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Roadblock heterarchy: How local checkpoints, a regional trade war, and global commodity chains intersect in Eastern Congo

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ROADBLOCK HETERARCHY

How local checkpoints, a regional trade war, and global commodity chains intersect in Eastern Congo

Peer Schouten



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Cover photo by research team (2025) Muzalendo at a roadblock in Hombo Sud, South Kivu. Photographs of identifiable individuals are published with their consent.

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SUMMARY

Since the remobilisation of the Rwandan-backed armed group M23 in 2021, the war in eastern Congo has escalated into a struggle fought not just over territory and mineral deposits, but the routes through which goods move. In fact, control over circulation now represents a primary axis of the conflict. Hundreds of roadblocks across Ituri, North Kivu and South Kivu (on the country's eastern border with Uganda, Rwanda and Burundi) have become key instruments by which armed actors tax trade, regulate movement, and compete for economic and political leverage. Against this backdrop, the report analyses three key but contrasting commodity chains – gold, cacao and beer – showing how in each case the checkpoint landscape intersects with local, regional and global circuits of exchange.

The above reframing has important implications for policymakers. International policy on eastern Congo tends to centre around sites of production and resource extraction. However, value is captured along the entire supply chain. Policy instruments and regulatory controls targeting upstream processes may therefore overlook the downstream dynamics driving political and economic competition. Here, it should be acknowledged that the proliferation of checkpoints in eastern Congo reflects neither unstructured anarchy nor a single, coherent system. Instead, it is best understood as a *roadblock heterarchy*: a fragmented but structured landscape in which different actors exercise authority over circulation according to varied political and economic logics.

Eastern Congo is currently at the centre of a regional trade war, with neighbouring countries competing for access to the area's resource hinterland and markets. Not coincidentally, armed actors are present at almost every checkpoint in eastern Congo's road network, with rebels controlling nearly half of all roadblocks assessed. Four actors dominate this landscape: 1) the M23 armed group, which has used roadblocks to construct its own taxation regime; 2) Congolese civilian state agencies, which turn formal regulatory systems into informal brokerage over passage; 3) Congolese armed forces, which sustain their heavy deployment in the region through dense checkpoint networks; and 4) wazalendo militias, which territorialise circulation from below by embedding taxation within local struggles.

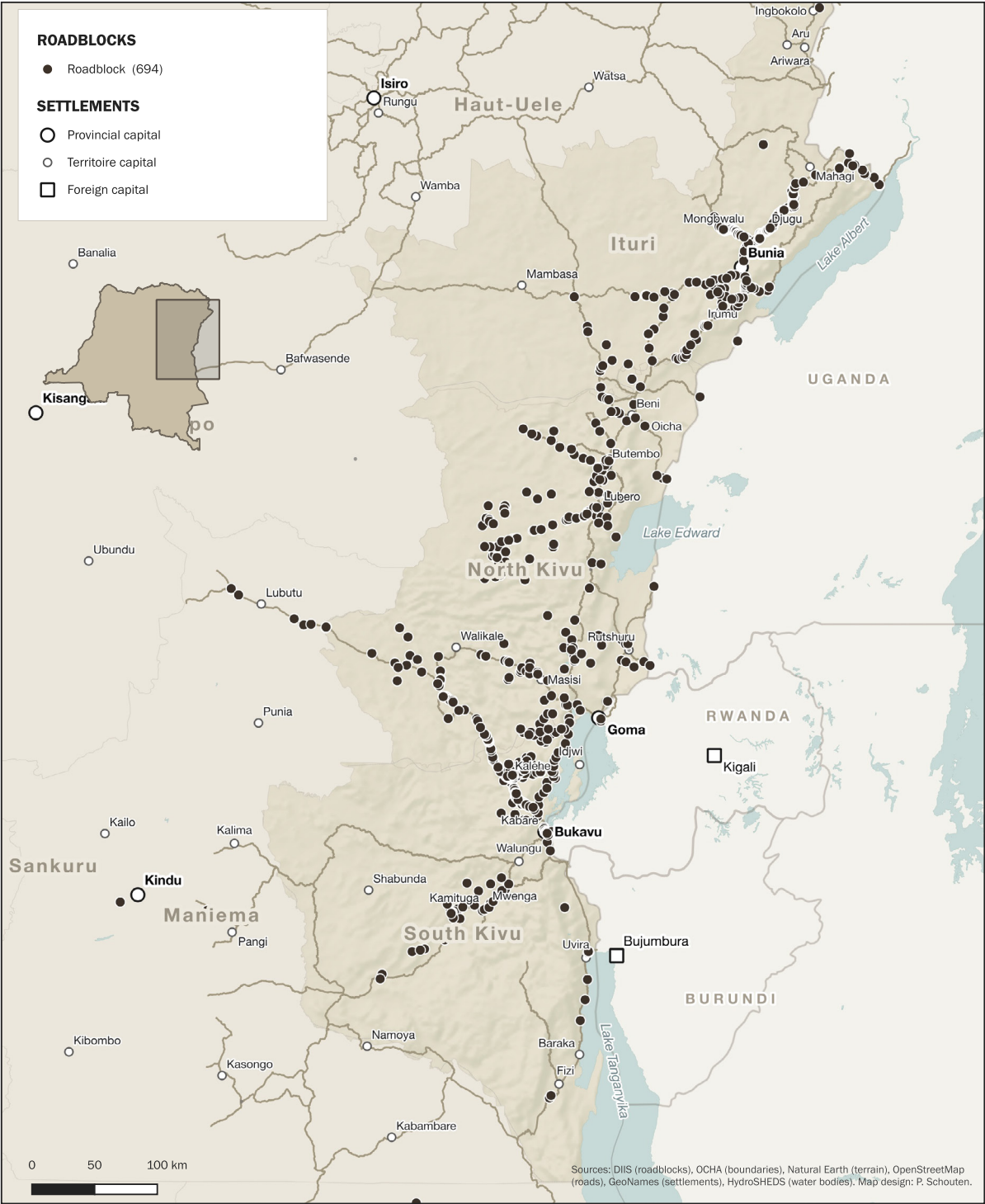
The report's key findings can be summarised as follows:

- **Circulation is a primary axis of the conflict economy.** Value is captured at bottlenecks all along the supply chain, from remote mining sites to refineries abroad. Thus, the governance of movement has become as important as the governance of territory. In order to understand the political economy of conflict, therefore, we must follow commodities along the entirety of the supply chain, not just examining production sites.
- **Commodities are not passive objects.** Rather, their material properties shape how armed actors intervene in their circulation, offering distinct opportunities for control and rent extraction.
- **The roadblock landscape is not chaos, but structured competition.** Different actors organise authority over circulation in ways that reflect their contrasting political projects, spatial positioning and economic constraints. These logics coexist, overlap and compete along the same roads, producing a fragmented but patterned landscape of extraction.
- **Eastern Congo's roads connect the local to the global.** The checkpoint landscape inside eastern Congo is not insulated from wider circuits of exchange. For instance, roadblocks along mining corridors are linked to Indian Ocean trading networks in which Dubai and Hong Kong serve as offshore nodes.
- **Western leverage over these circuits is structurally limited.** The Indian Ocean exchange geography through which gold and other commodities flow is deliberately organised to elude Western oversight. Here, regulatory frameworks premised on supply chain transparency in European and American markets operate upstream of circuits largely structured to circumvent them.

ABBREVIATIONS

ADF	Allied Democratic Forces
Bralima	Brasseries, Limonaderies et Malteries du Congo [Breweries, Soft Drink Factories and Malteries of Congo]
Bralirwa	Brasseries et Limonaderies du Rwanda [Breweries and Soft Drink Factories of Rwanda]
Brarudi	Brasseries et Limonaderies du Burundi [Breweries and Soft Drink Factories of Burundi]
CNDP	Congrès National pour la Défense du Peuple [National Congress for the Defence of the People]
CODECO	Coopérative pour le Développement du Congo [Cooperative for the Development of Congo]
DGI	Direction Générale des Impôts [General Directorate of Taxes]
DGDA	Direction Générale des Douanes et Accises [General Directorate of Customs and Excises]
DRC	Democratic Republic of the Congo
ESCO	Edm Schluter Co Ltd.
FARDC	Forces Armées de la République Démocratique du Congo [Armed Forces of the Democratic Republic of the Congo]
FC	Franc congolais [Congolese franc]
FDLR	Forces Démocratiques de Libération du Rwanda [Democratic Forces for the Liberation of Rwanda]
FDNB	Force de Défense Nationale du Burundi [Burundi National Defence Force]
FPIC	Front Patriotique et Intégrationniste du Congo [Patriotic and Integrationist Front of Congo]
FPRI	Force de Résistance Patriotique de l'Ituri [Ituri Patriotic Resistance Force]
FPP/AP	Force Populaire Patriotique / Armée du Peuple [Popular Patriotic Force / People's Army]
M23	Mouvement du 23 Mars [March 23 Movement]
MCRP	Mouvement des Résistants Patriotes Congolais [Congolese Patriotic Resistance Movement]
PAPCO	Parti des Artisans de la Paix au Congo [Party of the Artisans of Peace in Congo]
RAD	Réserve Armée de la Défense [Armed Reserve for Defence]
RCD-Goma	Rassemblement Congolais pour la Démocratie–Goma [Congolese Rally for Democracy–Goma]
RDF	Rwanda Defence Force
REGIDESO	Régie de Distribution d'Eau [Water Distribution Authority]
SNEL	Société Nationale d'Électricité [National Electricity Company]
UPDF	Uganda People's Defence Force
VDP	Volontaires pour la Défense de la Patrie [Volunteers for the Defence of the Homeland]

Figure 1. Overview map: roadblocks in Eastern Congo, late 2025-early 2026



Source: Data by research team; cartography: P. Schouten (see credits in map for layer source attribution).

INTRODUCTION

Roadblocks – broadly defined as compulsory points of passage erected by an actor exercising de jure or de facto authority over movement (Schouten, Murairi and Kubuya, 2017: 6) – are hardly new in the Democratic Republic of the Congo (DRC). For decades, state agencies, soldiers, militias and customary authorities have relied on decentralised taxation at roadblocks to levy formal and informal taxes on transporters, traders, farmers and miners (see Fairhead, 1992; Muzalia et al., 2021; Newbury, 1984; Schouten, 2022). As a relatively easy way of extracting wealth, these roadblocks form a key interface between presumed ‘authorities’ and civilians.

The scale and significance of these checkpoints have, however, changed dramatically over recent years. Ever since the renewed mobilisation of the *Mouvement du 23 Mars* (M23) in 2021, eastern Congo’s transport network has become a critical battleground between Congolese armed forces, militias and neighbouring countries, who are all competing violently for influence over the rents accrued from both local exchange and cross-border trade. As a consequence, hundreds of roadblocks now punctuate everyday movement along the roads linking mining sites, farming areas, towns and international borders.

The mapping of eastern DRC checkpoints conducted for this project identified 694 roadblocks across North Kivu, South Kivu and Ituri. This translates into roughly one roadblock every three kilometres – three times the average density recorded less than a decade earlier (Schouten, Murairi and Kubuya, 2017). Armed actors are now present at roughly 95% of checkpoints, attesting to the militarisation of eastern Congo’s road network.¹ Furthermore, with non-state armed groups now present at 60% of roadblocks – up from 22% in 2017 – more than half of all roadblocks are under rebel control.

Figure 2. A 'virtual roadblock' operated by wazalendo between Beni and Mangina



Source: Photo by research team (2025).

The mapping of eastern DRC checkpoints conducted for this project identified 694 roadblocks... roughly one roadblock every three kilometres — three times the average density recorded less than a decade earlier.

Such developments raise a number of questions. How should we understand this new roadblock geography? How does it relate to regional and international competition over Congo's minerals? More broadly, what are the implications when it comes to trade, conflict and livelihoods, and how these dynamics interact? Do we need to shift our thinking on governance in Congo?

Using roadblocks as an entry point, this report examines how the struggle for control over circulation is central to the conflict currently affecting eastern Congo. Two premises guide the analysis. The first is that armed groups, state agencies and neighbouring governments seek leverage over the strategic points found along commodity routes. Natural resources travel from sites of production in eastern Congo via Uganda, Rwanda, Burundi and beyond to Indian Ocean ports and global markets, with manufactured goods moving in the opposite direction. Thus, the roadblock configurations found in eastern Congo are embedded within broader regional and global supply chains, linking local extraction sites to distant consumer markets.

From this perspective, the conflict cannot be understood solely as a localised struggle over mineral production. A wide range of actors along the routes to and from international markets seek to capture rents by monopolising access, imposing transit taxes, manipulating terms of exchange, and influencing where commodities become legible within regulatory systems. Roadblocks are one of the principal instruments by which these 'gatekeeping' strategies are pursued.²

Eastern Congo's road networks link not only mining sites and towns, but the fiscal and commercial interests of neighbouring states and regional trading hubs. As governments across the region seek to redirect and control trade flows through their own territories, so the regulation of circulation inside eastern Congo becomes increasingly entangled with wider geopolitical and economic competition. Since M23's remobilisation in 2021, neighbouring countries have become drawn into what is perhaps best described as a regional trade war over access to the profitable economic hinterland that is eastern Congo.

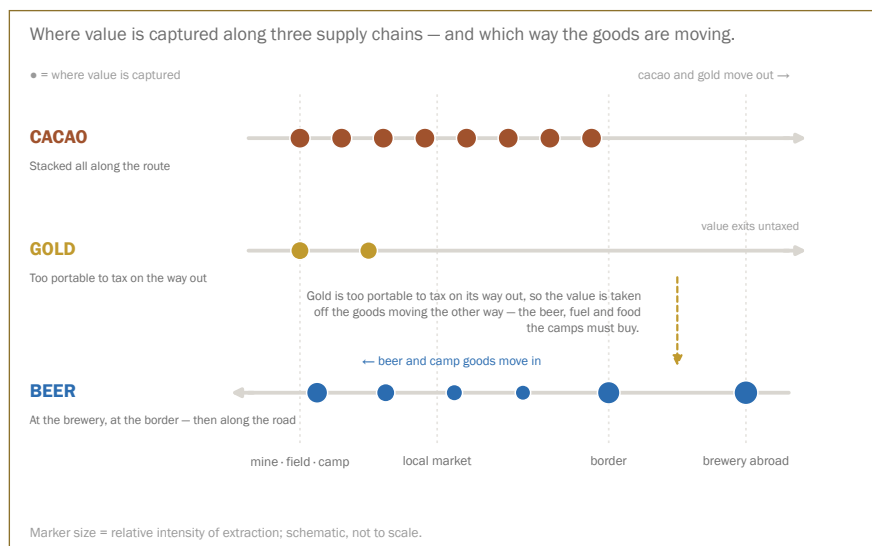
The second premise is that while all parties to the conflict use roadblocks to extract rents from circulation, they do so in different ways and to different ends. In other words, different roadblocks may, despite similarities in form, express radically contrasting political and economic objectives and constraints (Neil and Htoo, 2026). The roles fulfilled by a roadblock encompass some or all of the following: embedding circulation in local social struggles; offering protection to resource extraction; sustaining monopolies over particular commodities; extracting wealth from labour; supporting overlapping hierarchies of authority; and/or anchoring diffuse political settlements between armed actors, traders and local elites. Because of these diverse aims, roadblocks provide a window onto the competing but coexistent forms of order-making in eastern Congo.

The scattered territorial nature of roadblocks means such logics frequently intermingle along the same transport corridors (Schouten, 2026). Goods may therefore pass through a diverse sequence of taxation or security regimes, each reflecting the priorities of whichever actor controls a particular stretch of road. At the same time, the commodity chains involved impact and empower this assortment of political projects. The system-level result is what this report terms a 'roadblock heterarchy': an interconnected landscape characterised by economic circulation, enmity and collaboration, in which multiple actors simultaneously exercise authority over circulation without any single overarching objective or unified chain of command.³

Centring cross-border commodity chains

To date, much of the attention directed at eastern Congo's wars has centred around how mineral extraction finances armed groups (see Vogel, 2022). Other commodities however also finance conflict; their material properties and the way they move shape how exactly rents can be drawn from them (Schouten et al., 2026). With this in mind, the three commodities chosen for analysis in this report – gold, cacao and beer – each shed a distinct light on how the regional trade war interacts with local conflicts around circulation.

Figure 3. Extraction profiles of beer, cacao and gold



Source: Figure by P. Schouten.

Gold represents the archetypical conflict mineral. Although highly valuable relative to its weight, it is easily concealed, and so difficult to intercept or tax directly. It is therefore easier for armed actors to capture rents indirectly by taxing access to mining areas, the labour of artisanal miners, and the consumer goods circulating within mining economies. While gold largely eludes formal taxes in DRC, the fact that it is key to the forex balance sheets of neighbours Rwanda and Uganda has important implications for the current conflict in eastern Congo (UN Group of Experts on the DRC, 2024a, 2024b; SwissAid, 2024).

Cacao, by contrast, is a highly 'lootable' agricultural commodity. The cacao boom in eastern Congo has generated an expanding frontier of cultivation, land conflicts and militia mobilisation as plantations spread into remote areas beyond effective state

control. Of particular note are Uganda's Allied Democratic Forces (ADF), whose incursions into Congo have propelled the mobilisation of other non-state armed groups operating in the vicinity of the cacao frontier. Cacao is harvested seasonally and transported in bulk, rendering it especially vulnerable to theft, illicit predation and taxation along rural transport routes. Like gold, cacao is largely smuggled into neighbouring Uganda, where it is formally re-exported into global markets (see Furlan, 2025).

While not often considered in conflict analysis, consumer goods are vital to the political economy of the conflict. Beer is a case in point: a high-profile manufactured consumer good consumed in large quantities across the region, the substantial excise taxes levied on cross-border flows of beer have given it the status of a persistently lucrative commodity. Competition over brewery supply chains and urban markets directly link local roadblock politics to broader geopolitical struggles over trade and fiscal sovereignty, with M23 positioning itself as a key broker. According to our estimates, M23 has made over US\$3 million taxing the flow of beer into territory it controls, while other armed groups tax beer en route or monopolise the sale of beer in remote mining sites.

Following circulation: a note on methods

The report draws on the collective work of researchers from North Kivu, South Kivu and Ituri, and a researcher in Uganda with prior experience of studying roadblocks and cross-border trade. The team collected data between August 2025 and May 2026, conducting interviews and focus groups with artisanal miners, cacao planters, transporters, cross-border traders and smugglers. In total, this amounted to 103 individual interviews and 16 focus groups. Interlocutors were selected for their situated knowledge of points along the commodity chains studied. Roadblock data was compiled through first-hand GPS data collection, participatory cartography with key informants,⁴ and complemented by open-source intelligence wherever we could independently triangulate it.⁵ Satellite imagery was used to map land use change and identify smuggling points. Congolese franc amounts are converted at the parallel-market rate of about FC 2,300 to the dollar in early 2026.

We recorded as a 'roadblock' (or 'checkpoint', with the two terms used interchangeably throughout) any staffed point along a route where passage is subject to scrutiny, negotiation and – more likely than not – payment. This encompassed everything from permanent administrative buildings and road barriers to the more common '*barrières de fortune*' (often comprising little more than a rope slung across the road by a handful of soldiers or youth in civilian attire). It also included what initially appear

to be ‘volunteers’ repairing the road, but in reality are individuals who systematically extort passers-by; ‘virtual roadblocks’, in which members of M23 or some other armed group assail approaching vehicles despite not having any physical setup; and ‘periodic’ roadblocks, whose presence is contingent on harvest or market-day cycles (see Schouten, Murairi and Kubuya, 2017). A considerable number of the roadblocks surveyed were tied to shifting frontlines, and therefore probably temporary in nature. Nevertheless, roadblocks tend to outlast the situation that gave rise to them, reflected in the fact that, in North and South Kivu, the two provinces also covered by the 2017 survey, 32% of the barriers we mapped were already in place then.

The report does not claim to provide an exhaustive overview of all the roadblocks in eastern Congo today. Rather, it seeks to highlight their significance in the regional geopolitical dynamics surrounding resource and commodity flows. To this end, the focus is on strategically selected corridors that connect local conflicts in the DRC to neighbouring countries with a stake in the ongoing conflict. Main cross-border corridors and feeder roads that connect to mining and cacao-producing areas are thus over-represented compared to other kinds of transport routes, which are likely just as littered with roadblocks. We did, however, attempt to comprehensively map M23-operated roadblocks, while our selection bias is somewhat attenuated by small case studies located outside these corridors, which were selected due to local interest or the availability of reliable open-source information. Together, these corridor studies and local snapshots provide a window onto how authority over circulation is being reorganised across eastern Congo’s fragmented transport landscape.

The remainder of the report proceeds as follows. First, the report examines the history of roadblocks in the DRC and the broader regional tensions that have transformed eastern Congo into a battleground for control over cross-border trade. Next, it maps the contemporary checkpoint landscape, identifying who operates which roadblocks across the region, as well as how different actors exert their authority over circulation towards divergent ends. In order to illustrate how different commodity chains interact with this roadblock heterarchy, subsequent case studies follow three key commodities at the centre of the regional trade war: respectively gold, cacao and beer. The conclusion draws the report’s threads together before offering a series of takeaways.

CONTEXT: A BUDDING REGIONAL TRADE WAR?

Eastern Congo occupies a central position in the political economy of the Great Lakes region. Although often portrayed as isolated and impoverished, the region is not only one of the largest consumer markets in Central and East Africa, but a major source of minerals and other natural resources circulating through regional trade networks towards the Indian Ocean economy. Indeed, Eastern Congo's checkpoint-infested roads all eventually connect to neighbouring countries, which have long benefitted economically from acting as gateways for natural resources leaving Congo, as well as manufactured goods transiting into the country from the Gulf and Asia (cf. Musila 2009). As Tanzania's president observed in 2023: 'The DRC is a big country, a big market, so everyone, every country has to find their own way to get there' (cited in IPIS/ASSODIP/DIIS, 2024: 12).

The DRC is a big country, a big market, so everyone, every country has to find their own way to get there.

— Tanzania's president, 2023

Congo's eastern neighbours can thus be characterised as 'gatekeeper states', overseeing 'transit economies'; as has been noted, 'Rent seeking is an almost constant feature in the overall political economy of transit' (Cantens and Raballand, 2017: 5). Over the past decade, Burundi, Rwanda and Uganda have seen their dependency on trade with Congo deepen further. For Burundi, this was propelled by donor retreat after the former president exceeded the country's two-term limit in 2015. Rwanda, more recently, sought to increase DRC trade as a means of

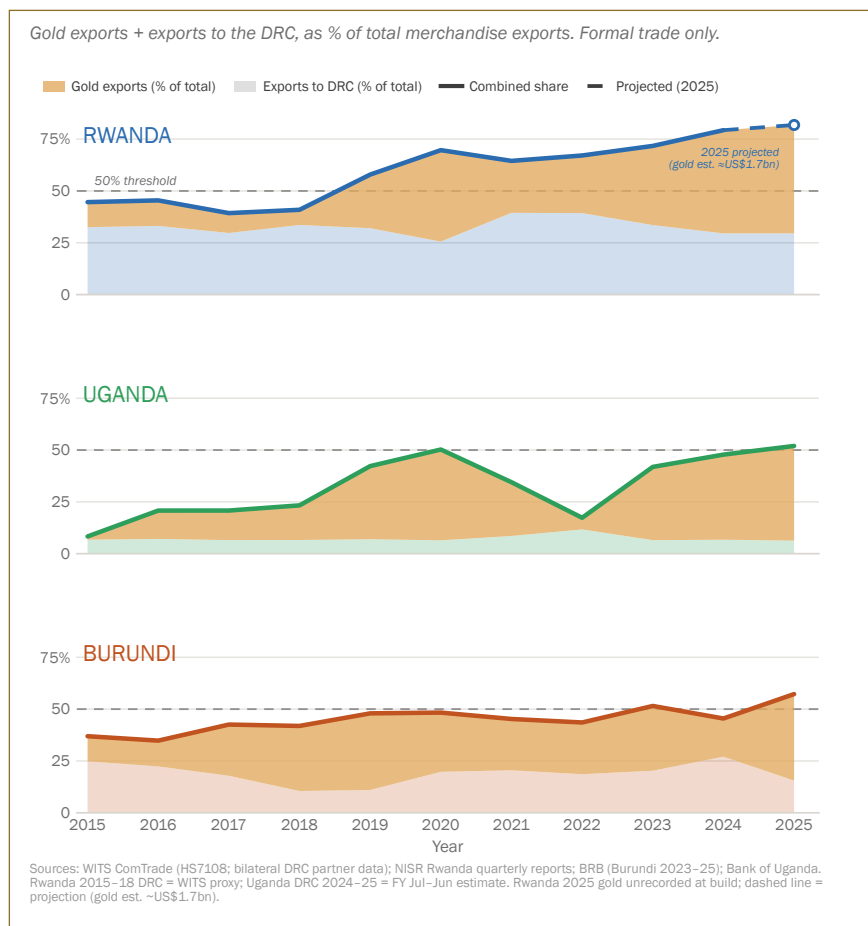
compensating for the losses incurred by sanctions and reduced donor support. Moreover, soaring gold prices prompted all three countries – Uganda especially – to take a greater interest in channelling the exports of DRC's artisanally mined gold. Essentially, they profit from turning 'informal' gold imports from the DRC into 'formal' exports shipped elsewhere. The three states are thus incentivised to keep mineral imports from Congo informal and unregulated, only seeking formalisation at the narrow bottlenecks where such minerals can profitably be turned into taxable exports.

Together, formal exports to, and gold largely re-exported from, eastern Congo make up nearly half the total export earnings in each of the three countries (see Figure 4). This offers a key source of foreign exchange to balance imports, as well as an important source of fiscal revenues.⁶ The structure of this economy is likely circular: the dollars earned trading Congolese gold are used to purchase manufactured goods in the Indian Ocean economy, which are then resold in Congo in order to obtain the dollars needed to buy more gold. The economies of these neighbouring countries have thus become increasingly 'extraverted' (Bayart, 2000) to the point that access to eastern Congo's deregulated, dollarised market can be seen as economically and politically existential.

In parallel with this deepening trend, Congolese president Félix Tshisekedi, since coming to power in 2019, has sought to establish greater control over the cross-border trade circuits established under his predecessor, Joseph Kabila. These, it was felt, were enabling the leakage of rents into neighbouring countries. Among other measures, the Congolese government began blocking imports that competed with domestic markets, while looking to export Congolese gold exclusively through Emirati partners to prevent smuggling across the border (Global Initiative Against Transnational Organized Crime, 2026; Stearns, 2023).

Prior to 2021, Uganda, Rwanda and Burundi had largely respected the informal boundaries delineating what each considered 'their' respective economic sphere of influence inside eastern DRC. This convention broke down, however, in the wake of joint military operations launched by the Congolese and Ugandan armed forces against the Allied Democratic Forces (ADF) – a jihadi armed group with Ugandan origins – in November that year. The offensive was accompanied by a Ugandan road rehabilitation project carried out by a firm with alleged links to Salim Saleh, brother to Ugandan president Yoweri Museveni (see Figure 5). This scheme threatened to trespass on Rwanda's putative economic hinterland in eastern Congo by linking it directly to Ugandan logistical corridors (see Congo Research Group and Ebuteli, 2022; Titeca and Salvaggio, 2025).

Figure 4. Neighboring countries' dependence on DRC trade, 2015–2025



Source: Figure by P. Schouten (see credits for data sources).

Later that same month, the Rwanda-backed M23 rebellion re-emerged. Having attacked the Ugandan contractors, the group proceeded to capture the strategic Bunagana border crossing between Uganda and the DRC (Bagala, 2025). From early 2024 onwards, the group expanded rapidly, occupying much of what Rwanda regarded as its Congolese hinterland. Since then, they have ensured trade from the area is channelled through Rwandan territory. Moreover, exports from Rwanda to the DRC have grown by 42% since M23 occupied Goma and Bukavu, creating a 'captive market' for its exports (KT Press, 2025b).

Mimicking Uganda, M23 announced its own road rehabilitation project inside the DRC, executed by a contractor with suspected links to the Rwanda Defence Force (RDF) (see Figure 5 above).⁷ In what appears to be a budding regional trade war, key arteries inside eastern Congo are now viewed as prime real estate, with boots on the ground used to secure exclusive access. According to the UN Group of Experts, the RDF is deeply embedded in M23 (UN Group of Experts on the DRC, 2024b, para. 49;

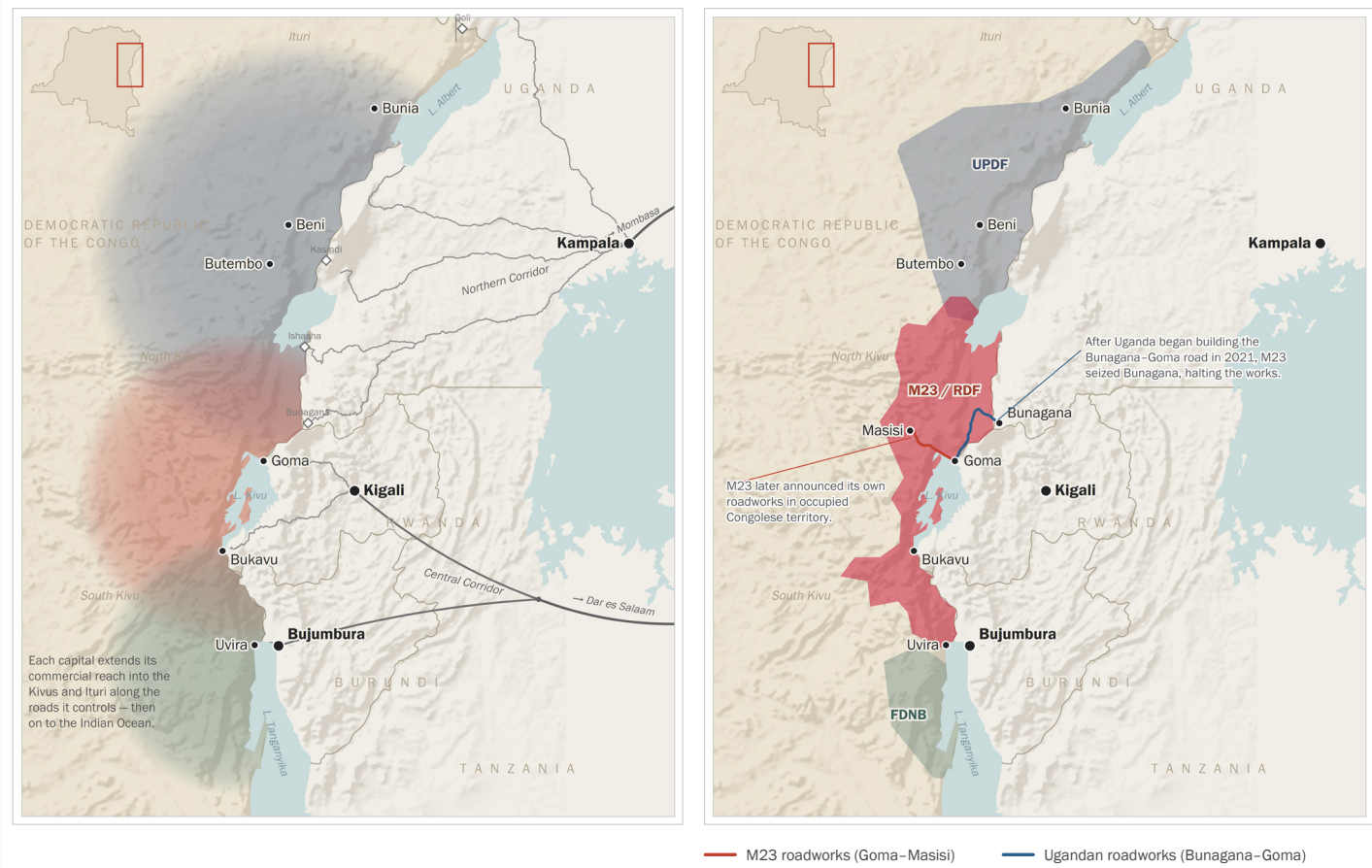
Figure 5. Placards announcing Ugandan (left) and M23 (right) road rehabilitation efforts inside eastern Congo



Sources: Photos by research team (2025). For placement of these projects, see Figure 6 below.

Figure 6. From economic hinterlands to military spheres of influence

Left: Kampala, Kigali and Bujumbura as gatekeepers for trade with their respective economic hinterlands in DRC. Right: their military deployments (late 2025).

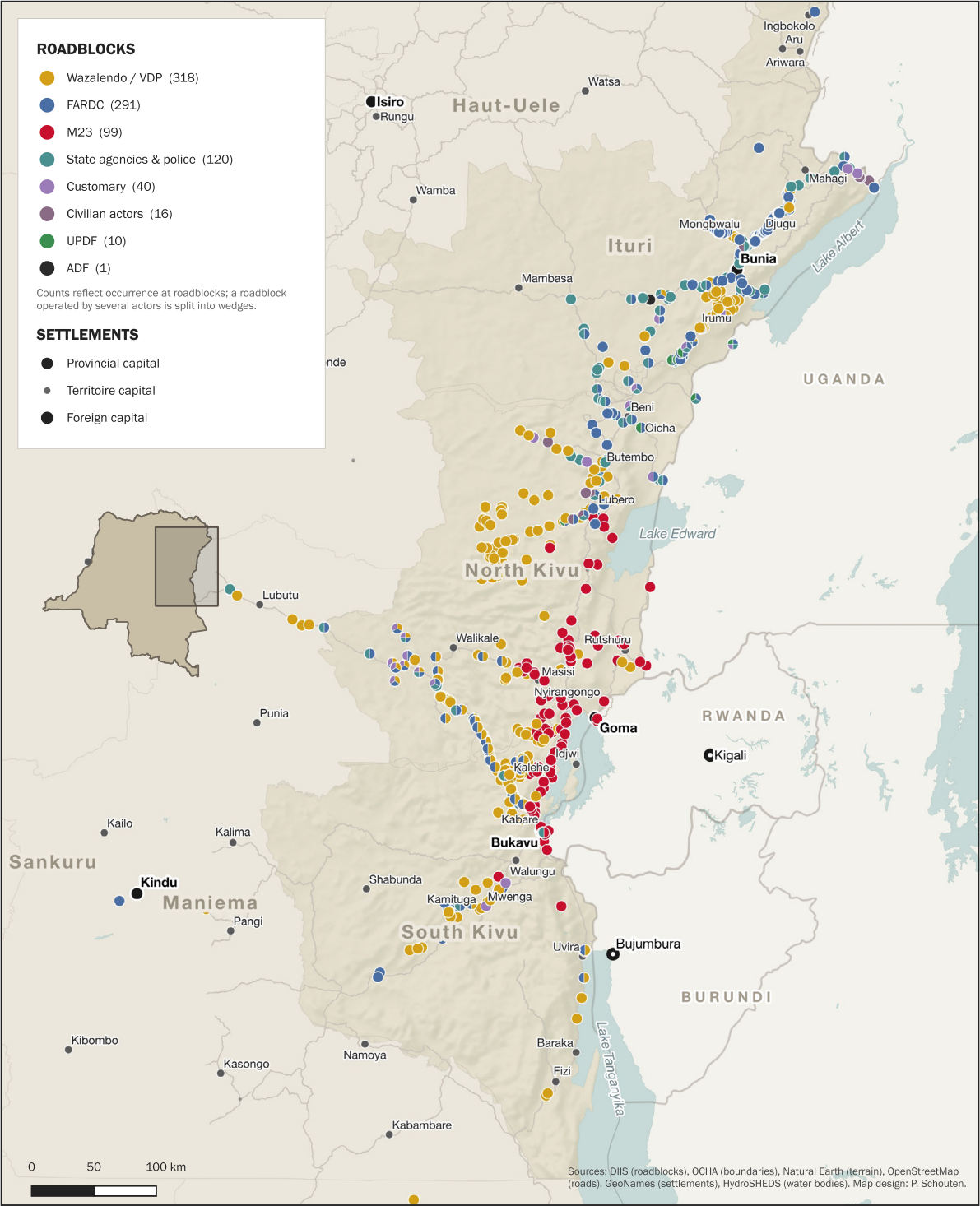


Corridors: OpenStreetMap · M23 area of control (Dec. 2025) adapted from IPIS · UPDF/FDNB deployments after AEI Critical Threats Project.
Base map: Natural Earth & OpenStreetMap. Cartography: P. Schouten.

2026, para. 97).⁸ Meanwhile, Burundian and Ugandan troops maintain a more discrete presence – although purportedly there to combat armed groups, they are also tasked with maintaining trade flows and acting as a buffer against mutual ‘hinterland piracy’ (cf. Titeca & Salvaggio, 2025).⁹

The next chapter takes a more granular look at eastern Congo’s emerging landscape of control and contestation over circulation within this context.

Figure 7. Roadblocks in eastern DR Congo by actor, late 2025-early 2026



Source: Data by research team; cartography: P. Schouten (see credits in map for layer source attribution).

EASTERN CONGO'S ROADBLOCK LANDSCAPE

This chapter presents an overview of eastern Congo's contemporary roadblocks, including which actor controls which roads, with what intention, and to what effect.

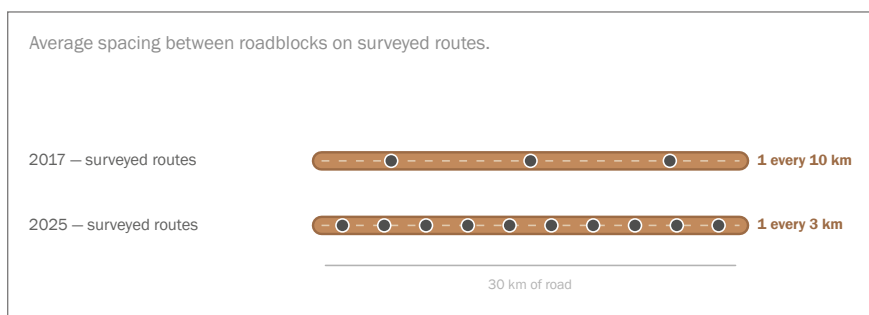
...thanks to your leadership, in the territory of Walikale we live with 70% peace and 100% of the tracasseries (harassment) orchestrated by the executive powers in the territory.

— Letter from the Walikale motorcycle drivers' association

Overall, 694 roadblocks were identified, 679 of which are located in North Kivu (229), South Kivu (213) and Ituri (237); the remaining 15 sit just across the provincial boundary in Maniema and Tanganyika (Figure 7).¹⁰ Whereas in 2017 there was, on average, one roadblock every 10 kilometres along the surveyed routes, that number has now risen to one roadblock every 3 kilometres (see Figure 8).¹¹

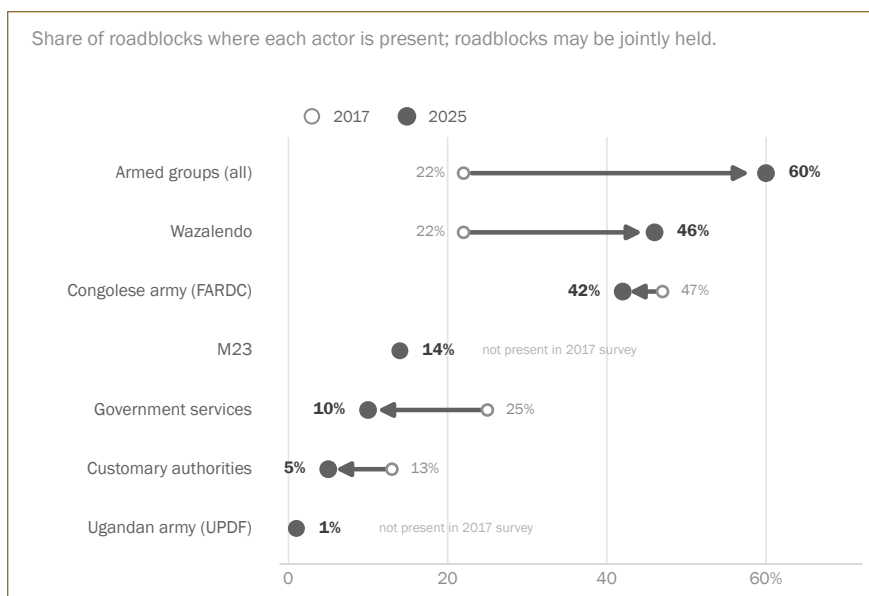
The network has also undergone unprecedented militarisation: armed groups are now present at 60% of all checkpoints, compared to just 22% in 2017. Rebel roadblocks thus outnumber those of the Congolese armed forces (FARDC), which are present at 42% of all roadblocks. The fact that the percentages for armed groups and the FARDC together exceed 100% is reflective of the fact that so many roadblocks are jointly operated by armed groups and Congolese soldiers.

Figure 8. Checkpoint density has roughly tripled between 2017 and 2025



Source: Data by research team (late 2025) and from IPIS (2017), as published in Schouten, Murairi & Kubuya (2017), figure by P. Schouten.

Figure 9. Actor share in roadblocks, 2017–2025

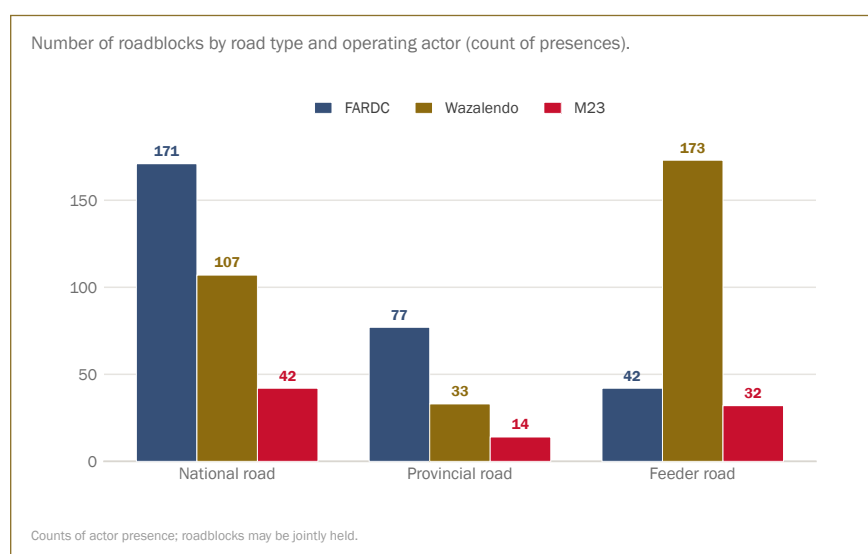


Source: Data by research team (late 2025) and from IPIS (2017), as published in Schouten, Murairi & Kubuya (2017), figure by P. Schouten.

At the same time, the civilian state's administrative presence on the road network has fallen by around three-fifths – from 25% of the roadblocks mapped in 2017 to 10% in 2025 (see Figure 9). Customary authorities have receded similarly, from 13% to 5%. The contemporary landscape is thus marked by a retreat of civilian government services from the road network, while at the same time armed actors expand across it.

Overall, roadblocks controlled by militias operating under the wazalendo umbrella are most likely to be found along feeder roads, with M23 and FARDC roadblocks concentrated more along national arteries. As such, the wazalendo tend to be located closer to supply chain frontiers – where natural resources are produced or extracted, and exchanged for manufactured goods – while the FARDC are more likely to be found along the corridors connecting these frontiers to borders and major trade hubs. Meanwhile, M23 controls a number of crucial regional transit spaces, including key border posts, urban consumer markets and a significant portion of mining zones (see Figures 10 and 11).

Figure 10. Who sits on which roads

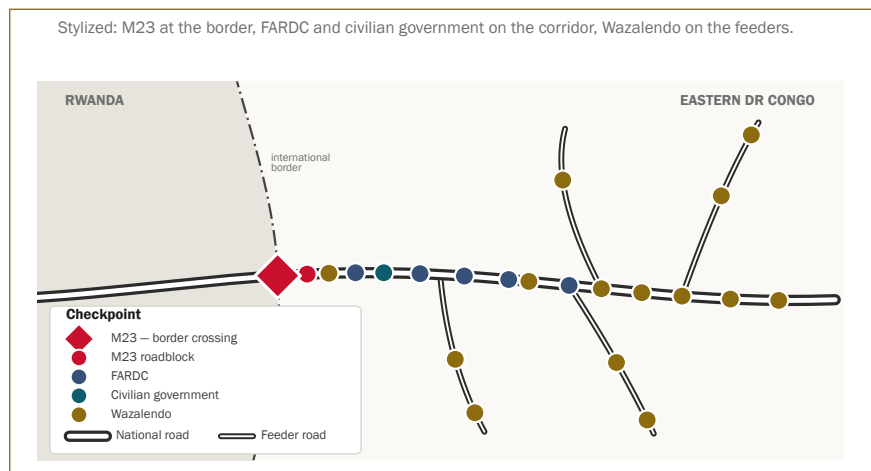


Source: Roadblock data by research team (late 2025) and from IPIS (2017), as published in Schouten, Murairi & Kubuya (2017), figure by P. Schouten.

Back in 2017, only 22% of roadblocks were operated by Congolese militias (from which the wazalendo stem). Of these, 80% were located along feeder roads and rural footpaths (Schouten, 2022). Today, while 54% of the wazalendo roadblocks still sit along feeder roads, they are increasingly encroaching on provincial (10%) and national (33%) roads.¹² Although this is partly reflective of the country's shifting frontlines, as wazalendo mobilise to contest M23's expansion along main arteries, several of their roadblocks impinge on national routes further afield. Indeed, never before have these relatively small, localised militias extended their reach so far onto the region's principal arteries: if there were only seven militia roadblocks on national roads in 2017, today this number is up to 107.

This encroachment is most accentuated in South Kivu, where the major Bukavu–Walikale and Bukavu–Fizi routes are teeming with wazalendo roadblocks. In North Kivu, by contrast, the wazalendo are more confined to feeder roads, with M23 dominating the key arteries.

Figure 11. Distribution of roadblock operators along an archetypal corridor

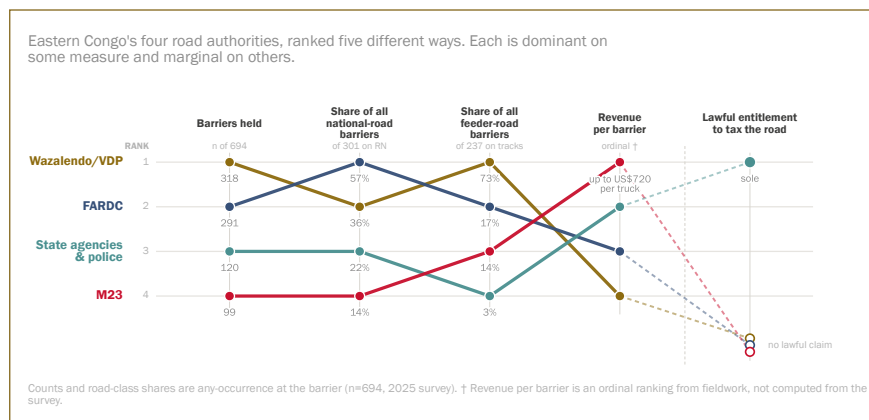


Source: Figure by P. Schouten, based on a figure from Duhamel as published in Schouten (2026).

Bearing all of the above in mind, a single truck travelling from Uganda into eastern Congo may pass through a number of radically different taxation and authority regimes in quick succession: a centralised M23 checkpoint issuing receipts; underpaid FARDC positions improvising charges; a cluster of civilian state agents demanding a trucker ‘se dédouaner’ (‘clear customs’); and/or wazalendo sites where passage is filtered according to affiliation. Goods moving along the same road may thus support contradictory projects of rule (see Figure 11). This landscape can be termed a ‘roadblock heterarchy’: a textured landscape interconnected by circulation, enmity and collaboration, where multiple actors exercise authority over movement in ways that are territorially fragmented, partially overlapping and unequally articulated (the extent of that overlap is mapped in Figure 7). The roadblock landscape pulls apart along two axes at once: into distinct spatial patterns, and into distinct actor-derived logics of extraction.

Carole Crumley (1995) coined the term ‘heterarchy’ to capture how control from different centres of power can differentially apply to different domains and sites; the sway actors have can thus be ranked in more than one way depending on the criterion applied. Eastern Congo’s road authorities are heterarchical in exactly this

Figure 12. Heterarchy: multiple rankings are possible



Source: Figure by P. Schouten.

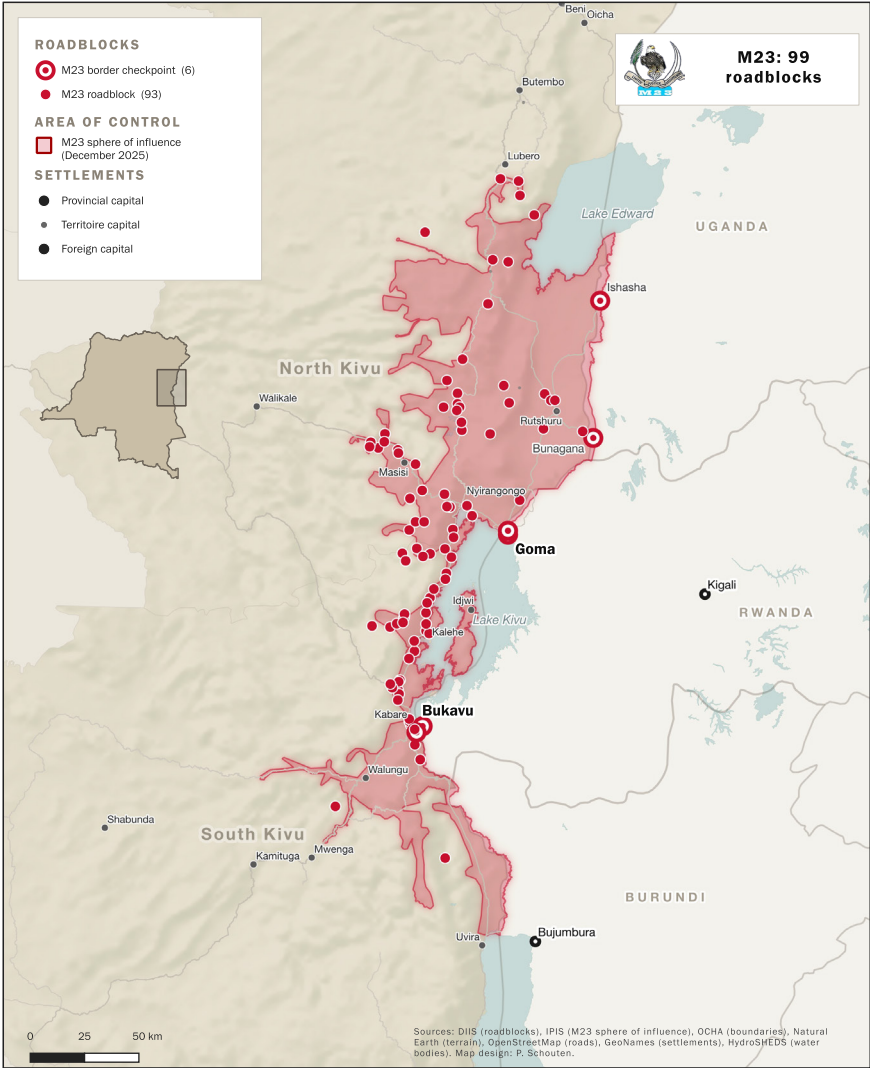
sense. Rank them by the number of roadblocks they hold and the wazalendo come first and M23 last; rank them by what a single roadblock yields and the order inverts. Rank them by lawful entitlement to tax and the civilian state agencies stand alone – yet they are among the least present actors on the road (Figure 12). Each authority is dominant on some measure and marginal on others, and none can be placed above the rest without choosing, arbitrarily, which measure counts. In attempting to understand this heterarchy as it applies to eastern Congo, it is therefore useful to distinguish between the contrasting logics at play. These are elaborated below.

M23: ECONOMIC COLONISATION THROUGH CORRIDOR CONTROL

The study identified 99 roadblocks operated by M23, constituting 24% of all armed group roadblocks and 14% of total roadblocks mapped.¹³ While these may appear to be relatively modest figures, these roadblocks allow M23 to exert monopoly control over a crucial part of the transport network of North and South Kivu.

M23's roadblock strategy combines continuity and change. The movement has a long history of taxing trade routes in eastern Congo, having emerged out of earlier Rwandan-backed rebellions that similarly focused on main towns, key roads and mining sites.¹⁴ During its occupation of parts of North Kivu in 2012–2013, M23 generated most of its revenues from the illegal taxes levied at roadblocks along major transport routes.¹⁵

Figure 13. M23 roadblocks and sphere of influence, December 2025



Source: Roadblock data by research team (late 2025); M23/AFC sphere of influence (dec 2025): courtesy of IPIS. Cartography by P. Schouten (see credits in map for layer source attribution).

More recently, the movement's roadblock strategy has evolved significantly. In March 2025, the movement announced a single, combined tax for transporters (Nouveau Média, 2025). Prior to this, each M23 roadblock had operated as an autonomous revenue-generating mechanism, which translated into fees being imposed at every

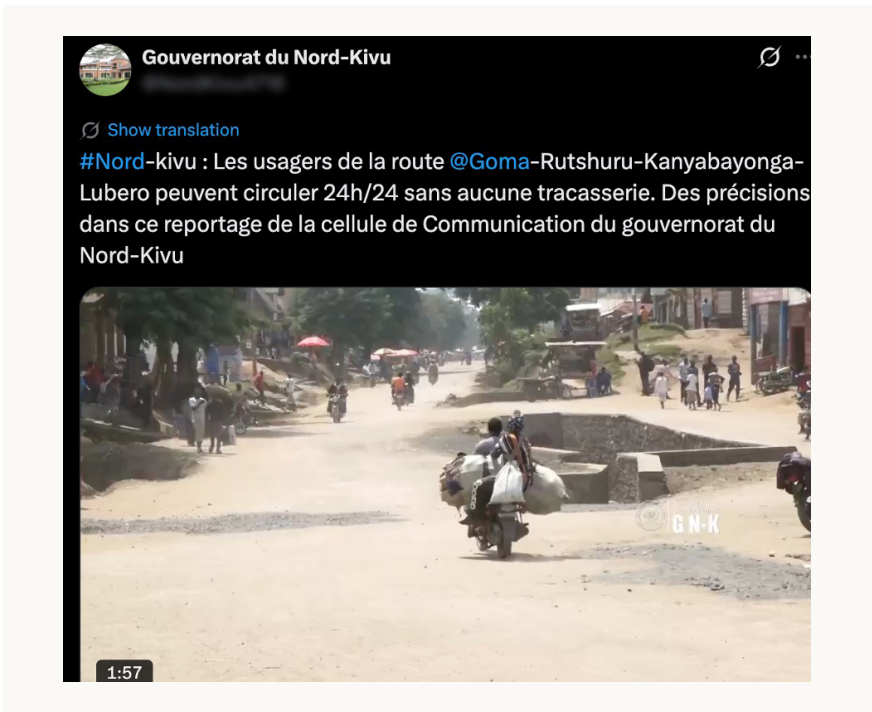
barrier (IPIS/ASSODIP/DIIS, 2024). Since then, however, M23 has increasingly used its roadblocks to signal a claim to conquered territory, within which economic activity is subsumed to a more centralised fiscal order – what the armed group itself hails as *'une révolution fiscale'*.¹⁶

Transporters interviewed for this study all independently asserted that M23-controlled roads have fewer roadblocks than before, and that taxes are generally only levied at the first checkpoint encountered.¹⁷ A receipt is then issued granting passage through subsequent barriers. Transporters indicate that although taxation levels can be high – up to US\$720 for a fully loaded truck – the simplified system lowers the overall cost and uncertainty of doing business compared to government-held territory. The movement doubling down on trade makes sense: according to the Congolese government, control over border posts and inland checkpoints makes M23 an estimated US\$17–20 million each month in taxes, largely levied at former government border points and checkpoints (Reporter.cd, 2026).

Thus, despite seeking to extract, M23 has made concerted attempts to reduce the friction encountered by bulk commerce. At the same time, M23 has imposed its roadblock taxes in such a way as to favour Rwandan-linked businesses over competitors from government-held or Burundian-linked zones. In December of 2025, almost a year after M23 occupied Bukavu and Goma, Congo reclaimed its position as Rwanda's primary export destination (KT Press, 2026). Individuals close to M23 are rumoured to have monopolies on profitable imports into Congo, including cement, fuel and cooking oil (TV5 Monde, 2026). Even Rwandan farmers benefit from the situation, as their products are in demand in Bukavu and Goma because they are cheaper than Congolese farming products, which are subject to strings of wazalendo and FARDC roadblocks, before being taxed again by M23. The knock-on effect is that farmers are struggling while basic foodstuffs have undergone dramatic price inflation, with, for instance, the cost of manioc – a staple food – increasing tenfold.¹⁸

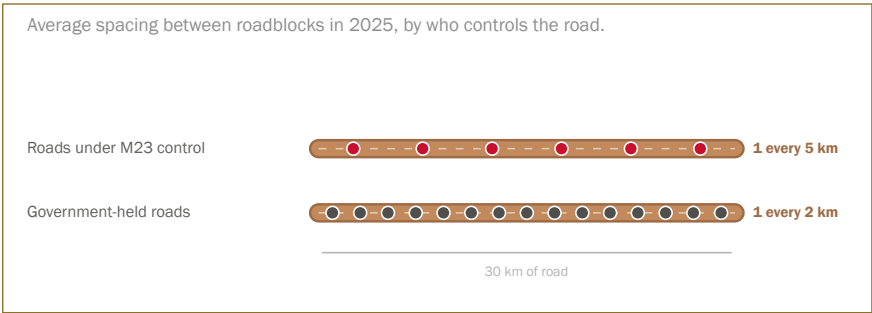
Roadblocks are as central to M23's revenues as they are to its attempts to project an image of superior statecraft. Towards this end, the group frequently posts on social media about the relative lack of roadblocks in 'liberated' areas (see Figure 14). The study's data indicates that roadblock density in areas under M23 control is indeed lower (one every five kilometres) than along nominally government-held roads (one every two kilometres, see Figure 15).

Figure 14. Example of M23 propaganda claiming a better circulation experience along 'liberated' roads



Source: Public X post by the M23/AFC-controlled Gouvernorat du Nord-Kivu, 26 May 2025, <https://x.com/NordKivu4716/status/1927005702452593069> (accessed 17 May 2026). Translation: 'Road users on the Goma–Rutshuru–Kanyabayonga–Lubero route can travel 24 hours a day without harassment. Further details in this coverage by the North Kivu Governorate's Communications Unit.'

Figure 15. Recorded density of M23 checkpoints vs roadblocks along 'government held' roads



Source: Data by research team, figure by P. Schouten.

While many transporters interviewed for the study were favourably disposed to the M23 taxation regime, this view was not shared by everyone. Contradicting the claims of a member of the M23 administration in Goma that 'M23 no longer taxes farmers, they are free to move as they like',¹⁹ rural sources across North and South Kivu indicate that small-scale traders and villagers continue to be harassed at M23 checkpoints, often through informal levies that contravene the movement's own rules. Anyone carrying agricultural produce between Masisi and Walikale, whether on foot or motorbike, is obliged to pay FC 2,000–5,000 at each of the ten M23 roadblocks, with no receipt issued. Likewise, hefty fees are imposed on women carrying fish from Lake Edward's fisheries to urban markets such as Lubero.²⁰

M23's taxation regime is therefore stacked in favour of trade elites and large-scale transporters, leaving ordinary road users exposed to petty extractions. Even so, compared to the multiplying roadblocks seen elsewhere, M23's regime is distinctive. Ultimately, it is perhaps best understood as a gatekeeper state writ little, profiting from the monopoly it claims over cross-border arbitrage and the taxation of both imports and exports.

CIVILIAN STATE AGENCIES: TURNING FORMAL PREROGATIVES INTO INFORMAL RENTS

The Congolese civil administration historically relies heavily on financing itself through decentralised indirect taxation at checkpoints placed at the entry to major towns and at the borders of inland administrative entities. Arguably, these are the only checkpoints with a legitimate taxation prerogative. But civilian government-operated roadblocks are today a small minority, with administrative services present at only 8% of mapped roadblocks in North and South Kivu, down from 21% in 2017 (Figure 16).

This 62% reduction is directly due to M23 occupying crucial cross-border and regional routes that traditionally formed the operating space for decentralised state agencies. To wit, according to the governor of South Kivu, now in exile in Uvira, the provincial administration has lost 84% of its tax revenues (Reporter.cd, 2026).

Where state-administered services remain, however, they are more densely concentrated than ever (Actualité.cd, 2026). Agents have regrouped along the remaining government-held corridors, leading to situations in which 20–30 agents from different services (e.g. customs, quality control, migration, tax authorities,

environmental services, intelligence, road toll, traffic police) swarm road users at a single checkpoint. In theory, each possesses a formal fiscal prerogative. In practice, road users are encouraged to 'se dédouaner' ('clear customs') by paying informal bribes rather than official taxes. In a letter to the President of the Republic, the local association of motorcycle drivers in Walikale, North Kivu, complained that, 'thanks to your leadership, in the territory of Walikale we live with 70% peace and 100% of the *tracasseries* (harassment) orchestrated by the executive powers in the territory'.²¹

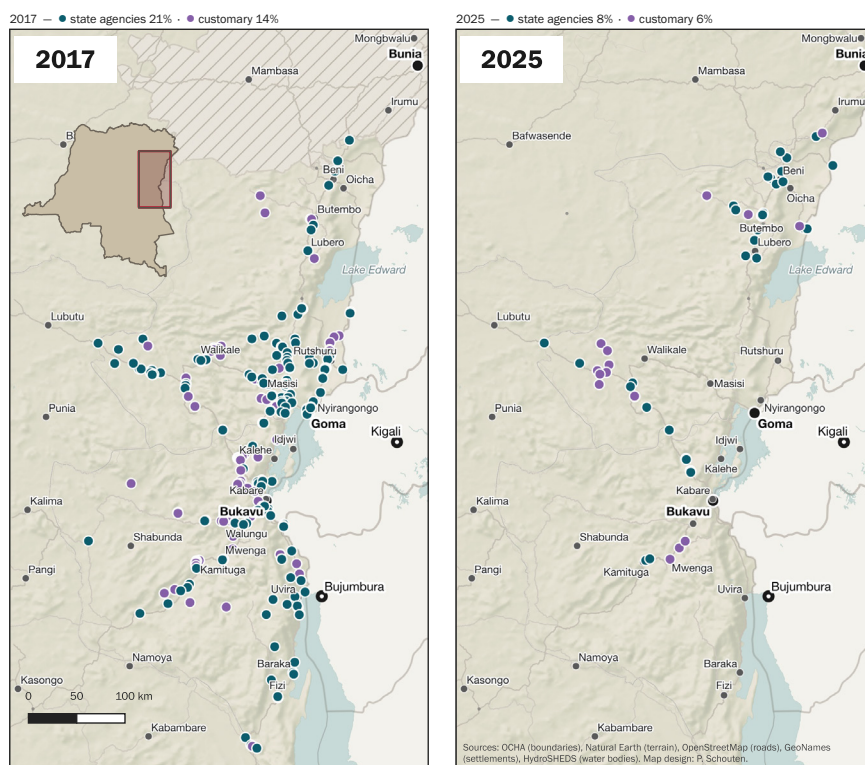
BOX 1. THE LONG HISTORY OF GOVERNMENT ROADBLOCKS IN THE DRC

Roadblocks and gatekeeping are longstanding features of the DRC's political economy, which since the colonial period has followed Frederick Cooper's 'gatekeeper state' model: power concentrated at the interface of domestic resources and international markets (Cooper, 2002). Upon coming to power in 1965, Mobutu manipulated the ensuing rents to fund loyal patronage networks from the centre (Schatzberg, 1980). With the Zairian state running short of resources to distribute in the wake of the 1973 oil crisis, however, a reverse patronage logic emerged. This revolved around higher-ups in the system licensing decentralised extraction to local gatekeepers, who in return passed on a portion of their earnings to their superiors. This 'democratisation of the gatekeeper state' significantly weakened administrative hierarchies throughout the country (see Muzalia et al., 2021; Schatzberg, 1979; Schouten, 2021; Verweijen, 2016).

Within this overall landscape, the central government persists as a gatekeeper, directing its administrative, security and fiscal power at a few highly rentable pockets (see Nest, 2002). Subsequent regimes made the most of these government revenues, as well as personal wealth accumulated from control over Katanga's copper mines and the routes along which ores were exported. Further revenue was extracted through tolls imposed along the main route by which manufactured goods were imported to Kinshasa (see Clowes and Kavanagh, 2022).

This system does not simply reflect corruption. Rather, it is tied to the Congolese state's decentralised fiscal organisation and the fact that many agents are not properly salaried. As such, they are expected to raise their own income, alongside any sums they must remit upwards in exchange for their posting (colloquially called '*le rapport*') (see Baaz and Olsson, 2011; Verweijen, 2018). This incentivises civilian state agencies to turn formal taxation prerogatives into informal rents. Towards this end, they deploy under-declaration, manufactured opacity, institutionalised mistrust of civilians, and incessant pressure to reach an informal settlement.

Figure 16. The retreat of civilian government from the road from 2017 to 2025



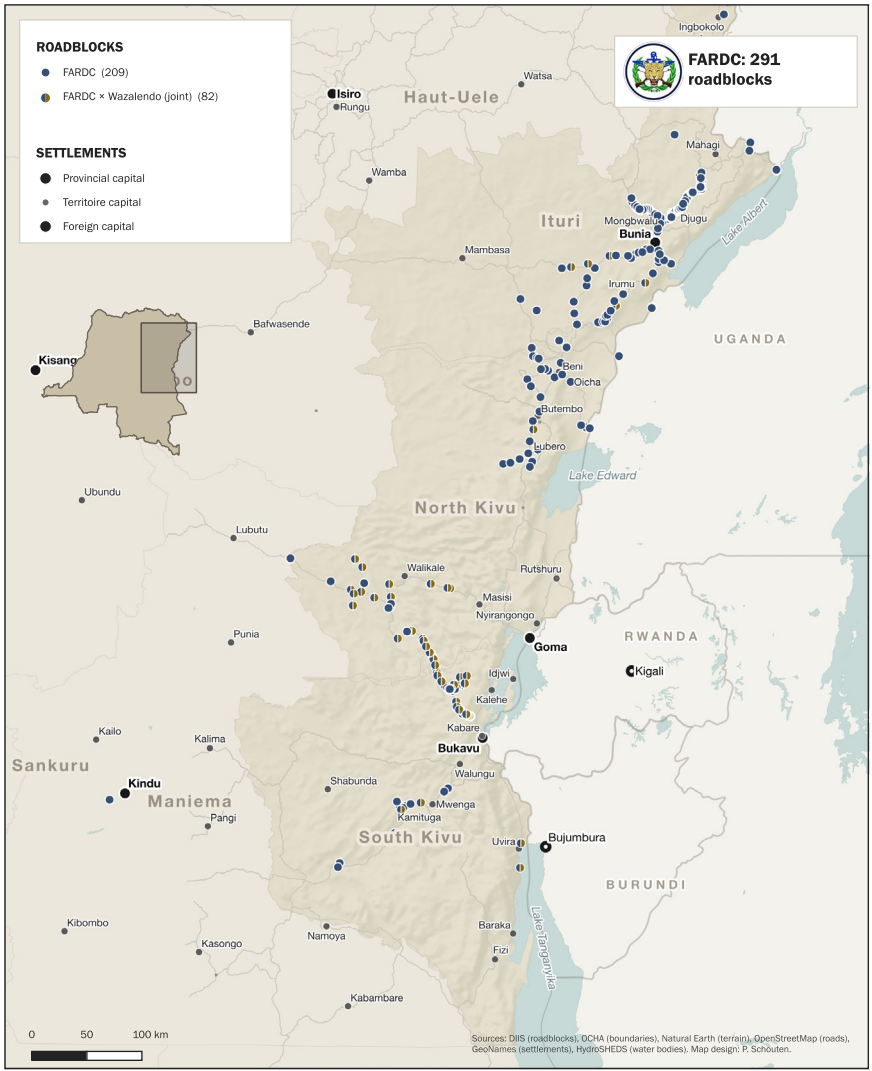
Source: Roadblock data by research team (late 2025) and from IPIS (2017), as published in Schouten, Murairi & Kubuya (2017), cartography by P. Schouten (see credits in map for layer source attribution).

THE FARDC: A PLATFORM OF DECENTRALISED SELF-FINANCING

With 291 roadblocks, the Congolese armed forces are the single biggest roadblock-operating entity (see Figure 17). Rather than operating as a unitary actor, however, the FARDC is best understood as a fragmented military platform through which individual commanders operate with relative autonomy. Military deployments commonly take the form of stretches of road allocated to particular commanders/units to protect, essentially granting a licence to mount roadblocks along that axis to extract rents from civilians (see Schouten, Murairi and Kubuya, 2017). From the government's point of view, allowing the army to enrich itself far from Kinshasa has the advantage of deflecting the attention of generals away from national politics. However, since President Tshisekedi declared a 'state of siege' in 2021, replacing

civilian government with military administration in the provinces of Ituri and North Kivu, the line between military authority and political power has increasingly become blurred (see CRG/GIC, 2023).

Figure 17. FARDC roadblocks, late 2025-early 2026



Source: Roadblock data by research team (late 2025), cartography by P. Schouten (see credits in map for layer source attribution).

Given that salaries of foot soldiers are often delayed by three months or more – or even consumed wholly further up the chain of command – these roadblocks also serve as a way of financing army deployment on the cheap. Essentially, the soldier's pay is crowdsourced locally. Depending on the context, proximity to the enemy, and mood of the commander and his subalterns, people travelling on foot or on the back of a motorcycle pay anywhere between FC 500 and FC 15,000 per roadblock, while motorised vehicles pay in the range of FC 10,000–100,000. The wildly divergent rates attest to the improvised, decentralised nature of the Congolese army. Along strategic routes, its makeshift roadblocks can often be found just a kilometre apart, making the collective burden of military checkpoints high. It is for this reason that seasoned traders seek agreements allowing them to be waived through checkpoints under a specific commander's control.

The FARDC, understood as a platform, is highly permeable, able to enter into local alliances with different actors. This has allowed rural militia members to don army uniforms as part of the 'reserve army' (RAD) or 'volunteers for the defence of the homeland' (VDP) moving from feeder roads to major roads in order to operate roadblocks jointly with the FARDC. About 12% of all roadblocks assessed – 82 in total – are jointly operated by the FARDC and wazalendo, most along national roads (see Figure 17). The fact that wazalendo often wear army uniforms, while soldiers may be missing parts of theirs, means road users find it increasingly difficult to distinguish between the two. This de facto power-sharing contrasts with M23, which – despite also collaborating with Congolese proxy militias – aims to project indivisible control.

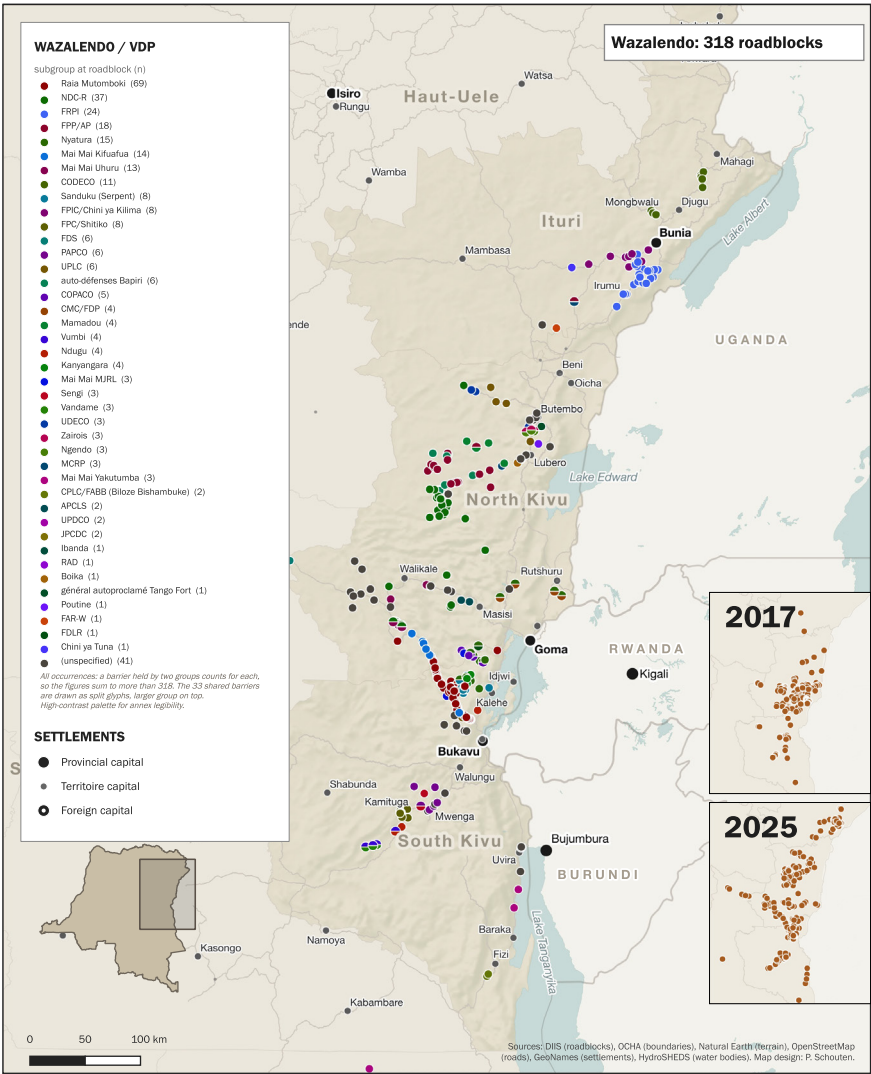
All this is not to say the army plays no stabilising role. In Ituri, for example, the military governor has reportedly forged bargains with gold-producing elites, pledging to secure major roads against militia incursions in exchange for direct payments.²² Even here, though, the provision of stability rests on circulation being monetised via dispersed deployment. Congolese frequently lament the proliferation of roadblocks and roadside exactions as the primary negative consequence of conflict. 'Sécuriser une route ne signifie pas installer vingt caisses de perception'—'securing a road doesn't mean installing twenty toll booths', as one journalist put it recently.²³

The study also identified the presence of Ugandan armed forces (Uganda People's Defence Force, or UPDF) at ten roadblocks in the area around Boga in Ituri. These troops are operating alongside the FARDC as part of the 'forward defensive posture' being pursued by Uganda in its hinterlands (UN Group of Experts on the DRC, 2025a, para. 57). The UPDF is restricted to supporting the FARDC at these roadblocks,

although tensions between the DRC and Uganda flared recently when the UPDF entered Mahagi by driving through government roadblocks without waiting for authorisation (Radio Okapi, 2026a).

WAZALENDO: TERRITORIALISED TAXATION AND THE SOCIAL COLOURING OF CIRCULATION

Figure 18. Wazalendo roadblocks, late 2025-early 2026



Source: Roadblock data by research team (late 2025) and from IPIS (2017), as published in Schouten, Murairi & Kubuya (2017), cartography by P. Schouten (see credits in map for layer source attribution and Annex 2 for details).

Wazalendo literally means ‘patriots’. This moniker, adopted by pre-existing militias joining the fight against M23, was intended to signal that any internal squabbles would be temporarily set aside in pursuit of a common struggle. While as a group the wazalendo operate over 300 roadblocks, it should therefore be remembered that the term covers over 200 localised militias across eastern Congo, most of which continue to anchor their struggles over circulation in the ethnic territories and local political histories from which they emerged (see Annex 2).²⁴

Figure 19. Muzalendo at a roadblock in Hombo Sud, South Kivu



Source: Photo by research team (2025).

This means that, unlike M23 and the FARDC, the wazalendo should not be treated as a single actor, but rather an amalgam of distinct groups, each with its own situated goals and antagonisms. Indeed, some groups treated as ‘wazalendo’ mobilised partly due to the perceived threat of other wazalendo encroaching on ‘their’ area. Such is the case with the self-defence groups of the Bapiri and Walese communities, set up as a bulwark against other militias expanding into their customary lands. As one source in South Kivu told us, ‘distinguishing them is not easy; it is often only when they clash that one group differentiates itself from this or that other armed group’.²⁵

These intra-wazalendo dynamics manifest in frequent disputes over roadblocks.²⁶ In September 2025, for instance, a faction called the Mai Mai Malaika attacked the Mai Mai Nyakiliba because the latter had refused to dismantle their roadblocks along

Figure 20. Foka Mike campaigns against roadblocks



Source: Public announcement poster circulated for wide distribution through WhatsApp channels by associates of Albert Kahasha Murhula ('Foka Mike') on 15 September 2025 and shared with the research team by a source who prefers to remain anonymous. Translation: 'End of roadblocks in the territories of Mwenga and Shabunda. Residents and travellers must be able to move freely in their communities without harassment. Peace and security are not a favour granted to us, but a fundamental right.'

National Road No 2 in Mwenga, South Kivu (Radio Okapi, 2025a). In the same area, wazalendo obeying Foka Mike, a former provincial minister, joined with the army to dismantle roadblocks by the wazalendo PAPCO faction, who then argued they needed to self-finance their deployment as they weren't supported by the government as other groups (RFI, 2025). For Foka Mike, this was about local militia competition for resources as much as political campaigning, as evidenced by his social media pronouncements (see Figure 20). Further to the south, in Fizi, militia leader William Yakutumba has long maintained a lucrative personal fiefdom taxing artisanal mining and traffic (see Stearns, 2013). Since the start of 2026, however, his group has clashed repeatedly with another wazalendo group looking to mount roadblocks in what Yakutumba considers his sphere of influence (Kivu Times, 2025).

The attachment of these various wazalendo groups to local community defence and situated grievances means that, taken together, they form a fragmented territorial patchwork.²⁷ One distinctive element of the wazalendo roadblocks is that their associated taxes vary according to ethnic identity and local belonging: road users from a militia's own community often pay far less than outsiders, while certain goods

traded by specific communities can become socially and politically 'coloured'. In South Kivu, for instance, suspicions that Shi traders from Bukavu collaborate with M23 have shaped how Tembo-linked wazalendo treat trade with, and commodities from, Bukavu. Similarly, local militias in Irumu, Ituri, predominantly tax ethnic Nande traders whom they consider to have 'taken over' trade and brought insecurity into 'their' area (see chapter on cacao below).²⁸ Consequently, the roadblock landscape is constantly re-evaluated in line with local alliances, balances of power and the profits enjoyed by particular communities.

An encounter with a wazalendo roadblock is more likely to involve elaborate exchanges aimed at establishing one's social belonging, which in turn determines the conditions imposed on passage. In such circumstances, the roadblock becomes a device for identification. Here, claims on circulation are embedded in social considerations and territorialised struggles. Any resultant 'inefficiency' is thus potentially reflective of attempts to protect values not easily recognised by theories focused on hierarchy, administrative predictability and rapacity.

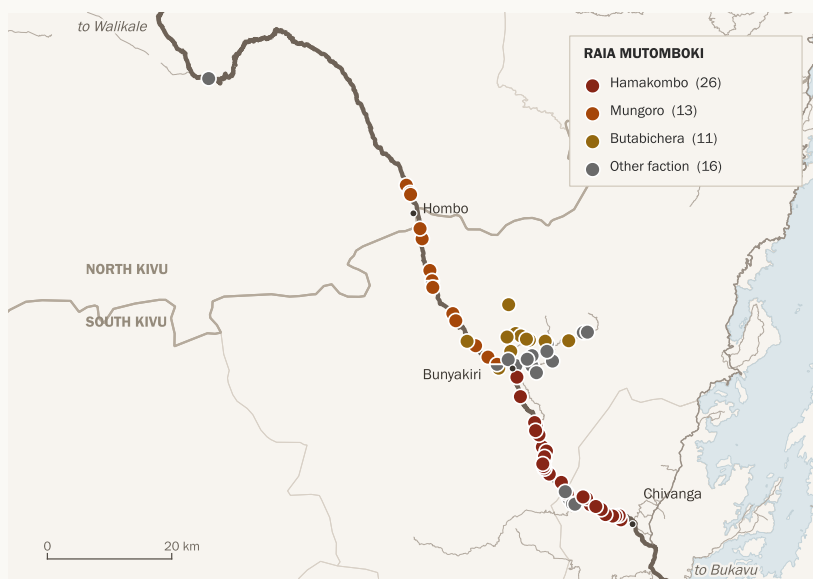
BOX 2. WAZALENDO CARVE UP THE ROAD NETWORK

The situation in Kalehe, South Kivu, reflects how the militarisation of key transport arteries often emerges from a negotiated local political settlement. Faced with M23's advance and a lack of meaningful financial support from the central government, local authorities and community leaders sought to mobilise existing armed networks as a defensive buffer.²⁹ In practice, this meant drawing Raia Mutomboki factions – long rooted in the area but typically operating from the bush (see Vlassenroot, Mudinga and Hoffmann, 2016; Vogel, 2014) – to more strategic positions along the territory's main roads and urban hubs, which are often the first targets of M23 expansion.

This deployment was coordinated through the local security committee, which includes state agents, traditional chiefs, the armed forces, the Fédération des Entreprises du Congo and civil society representatives. In negotiations, they divided Kalehe's road network into segments, which were then assigned to different factions in an attempt to manage both internal divisions and militia financing (see Annex 4.1).

The strongest and most senior Raia Mutomboki leader, Hamakombo, was allocated control over the main national road through Kalehe, while smaller or less influential commanders were assigned further afield or along secondary routes (see Figure 21). This arrangement was designed to accommodate the decentralised nature of the Raia Mutomboki, caused by various subalterns leaving to found their own groups after disagreements over politics or the division of spoils.

Figure 21. Raia Mutomboki roadblocks by faction along the Kalehe corridor



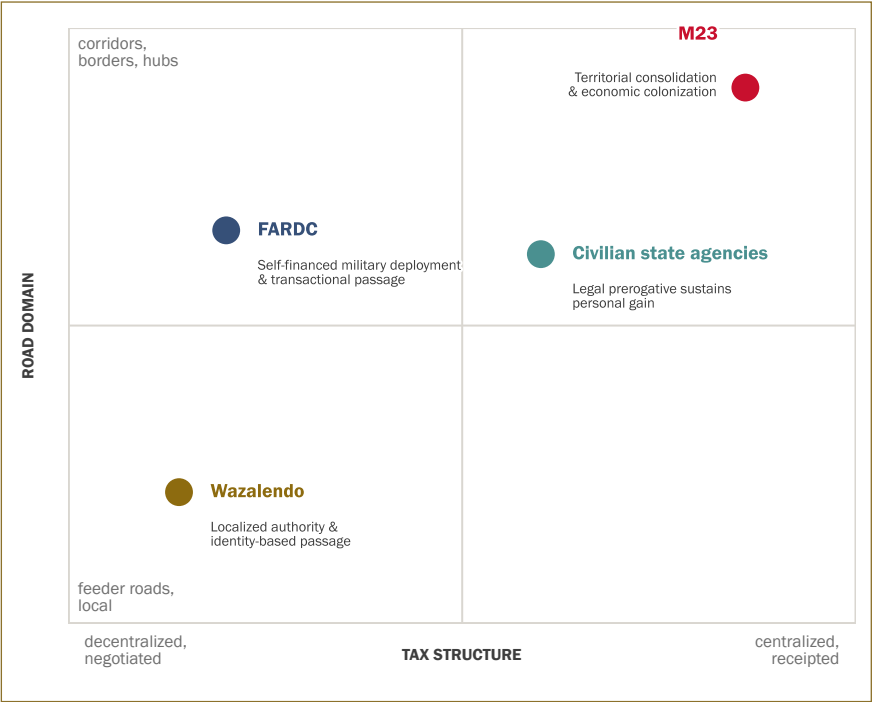
Source: Roadblock data by research team (late 2025), cartography by P. Schouten.

Local authorities initially envisioned a limited system in which each faction would maintain two to three roadblocks along their allocated axis. In practice, however, the militias set about erecting far more barriers than had been agreed, rapidly transforming the road network into a dense landscape of checkpoints.

This social embedding helps explain both the wazalendo's historical and current geography. In the past, the militias from which the wazalendo stem tended to dominate feeder roads, footpaths and rural areas. By erecting barriers along these secondary routes, they could curtail the expansion of dominant armed groups and the central government, while taxing circulation close to farms and mines (see Hoffmann, 2015: 174). More recently, however, the countermobilisation against M23 has drawn them onto main roads and urban areas – a process that requires that the internal tensions and competition among armed group factions be accommodated in some way (see Box 2). Given that the wazalendo's socially textured, ethnically layered interactions with trade are only loosely connected to the formal hierarchy of the state, this movement onto the region's main arteries represents one of the defining novelties of the current roadblock landscape.

SYNTHESIS: CONTRASTING CIRCULATION REGIMES

Figure 22. Four roadblock regimes



Source: Figure by P. Schouten.

Eastern Congo’s roadblock landscape reflects the diverse, partially overlapping networks of authority currently competing for economic rents along the region’s transport network. Occupying a strategic borderland, M23 uses fewer checkpoints in a bid to centralise taxation, reduce friction for favoured commerce and project territorial authority. Civilian state agencies survive on the remaining government corridors by multiplying their offices, brokering under-declaration and converting formal prerogatives into informal taxes. Both the FARDC and wazalendo ‘crowdsource’ local protection and the countermobilisation against M23. While the FARDC finances military deployment through a decentralised platform of unpredictable, small but numerous extractions, the wazalendo have sought to territorialise circulation from below, embedding taxation in local social frictions as they extend ever further from feeder roads onto national arteries.

The result is a roadblock heterarchy: not chaos, but the unstable coexistence of different registers of authority, each driven by their own military, social, political and economic considerations when looking to extract funds from the movement of people and things. As such, commodities crossing the eastern Congo do not encounter a generic 'checkpoint landscape'. Instead, they traverse a differentiated fiscal, social and ethnic landscape shaped by the value of a particular road, the kinds of goods travelling along it and the identity of those controlling it.

In order to unpack how this landscape fashions the political economy of conflict, the following three chapters trace how gold, cacao and beer respectively move through eastern Congo's checkpoint heterarchy. As will be seen, each commodity interacts with roadblocks in distinct ways, casting light on how struggles over transport routes translate into struggles over markets, taxation and political authority.



Artisanal gold pit in Ituri (top); gold in a paper wrapper (bottom left); a gold buyer's sign advertising the tola, a unit of gold weight (bottom right). Photos: P. Schouten.

GOLD

Over the past decade, gold has re-emerged as the most prominent conflict mineral in eastern Congo, with geopolitical and dollar volatility pushing global gold prices to unprecedented levels. This has triggered a new rush to gold both internationally and within eastern Congo. Despite a marked increase in the use of machine tools such as excavators and dredges, hundreds of thousands of artisanal miners continue to extract gold in dispersed sites across eastern Congo using only rudimentary hand tools. Working in groups of varying size, they sell what gold they are able to mine to networks of traders with cross-border contacts to any of the refineries in Uganda, Rwanda or the United Arab Emirates.

Each barrier has its amount ... we pay everywhere, and the selling price must rise to recover the losses.

— A transporter

Gold presents a particular challenge for armed actors looking to extract rents. Unlike bulk commodities such as timber, low-value mineral ores or agricultural products, gold is extremely valuable relative to its weight and easily concealed. Small quantities can be transported discreetly by individual traders, making it difficult to intercept or tax directly at roadblocks. Unlike the gold itself, however, the miners, along with the goods consumed in mines, are 'bulky' enough to be taxed along roads linking mining areas to regional markets. Because mining zones require enormous inputs in terms of fuel and consumption goods, the result is a geography characterised by intense commercial traffic and dense checkpoint taxation along the pathways connecting mines to borders.

The resultant system of indirect taxation is therefore based on three principal mechanisms: 1) taxing access to mines; 2) taxing commodities destined for mining areas along access roads; and 3) monopolising sales of such commodities within mining sites. In practice, this means the gold-related political economy of conflict extends well beyond extraction of the mineral itself; it encompasses the entire chain of people, goods and capital connected to mining areas. This chapter illustrates with material from Ituri and North Kivu.

THE START OF THE COMMODITY CHAIN: MONETISING ACCESS AND MONOPOLISING EXCHANGE

Armed groups, customary authorities and/or military commanders often impose fees on miners seeking access to mining sites. Wazalendo groups typically claim authority over specific mining sites, allowing their kin to exploit minerals freely while demanding payments from outsiders in exchange for protection or permission to operate. These payments include 'registration fees' (in the form of several grams of gold) paid to armed group commanders; daily access charges imposed on artisanal miners taking the path to the mines; and periodic taxes called '*ration militaire*'. For instance, the many roadblocks in the deep forest bordering Walikale and Lubero in North Kivu, while at a certain remove from gold mining sites, each generate around FC 1 million a day simply by charging each artisanal miner FC 5,000 per passage to/from the mines. As one community elder observed, 'They used to be operated by our customary authorities so that the money contributed a little to the development of the local community but the wazalendo have appropriated the right to levy taxes'.³⁰

This turns territorial control into an important vector of conflict inside gold mining areas. For instance, the armed group Zaire at one point controlled access to the rich alluvial sites around Mabanga in Ituri, working one site itself while granting exclusive licenses for the others to two cooperatives. Ituri's military governor has since chased Zaire and other armed groups from key mining areas, turning the military government into the exclusive broker of access and onsite protection. Thus, if mining cooperatives are to obtain access to a site, they must maintain good relations with the military governor.³¹

Rents can also be extracted from gold mining through monopoly pricing and debt relations within mining areas themselves. Here, traders linked to the entrepreneurs behind mining cooperatives, or local militia or armed forces commanders, monopolise the sale of certain consumption goods, such as beer, cigarettes, and

marijuana (see Laudati, 2013; Titeca, Joossens and Raw, 2011). Examples of this can be found at the more than two dozen isolated gold mining sites that lie on the border between Lubero and Walikale. These are controlled by a shifting patchwork of wazalendo groups, most of which mobilised after ADF incursions. Since then, however, the competing factions have entrenched themselves in profitable protection rackets around mining sites, premised mainly on revenues extracted from trade.

The militia commander in charge of a mining site here typically maintains a monopoly on the sale of goods such as beer, cigarettes and marijuana. Miners often end up paying for these products in gold rather than cash. The rate of exchange in such transactions is, however, artificially inflated in favour of the seller. For example, a beer might be sold for around 1.5 sengi – roughly 0.15 grams of gold – which corresponds to about US\$25 (or roughly FC 57,000 at early-2026 prices).³² Most artisanal mining schemes are pre-financed, meaning that businesspeople front the costs of machinery, fuel, food and access fees, which are later deducted from payouts to miners. Any consumption over and above such payouts are simply added to the miner's debt. Many miners are thus perpetually indebted and forced to repay what they owe at unfavourable rates.³³

ALONG THE COMMODITY CHAIN: TAXING GOLD THROUGH CONSUMPTION GOODS

Unlike the gold itself, the goods consumed in mines are bulky and must travel along roads linking mining areas to regional markets. Instead of taxing gold directly, armed actors have therefore sought to position themselves on the roads via which the mining economy circulates, extracting rents from the associated movement of goods and people. In this way, the checkpoint landscape captures value from the gold mining economy largely through indirect means.

In Ituri, the UN Group of Experts estimates that around 70% of all the province's Congolese soldiers have – at the behest of the military governor – been deployed along narrow corridors leading to key mining areas (UN Group of Experts on the DRC, 2024a). There are for instance 43 roadblocks, largely operated by the Congolese armed forces, along the 75 kilometre stretch of road between Bunia and Mongbwalu alone – roughly one every 1.5 kilometres. Those transporting goods by motorbike to mining sites must pay at each roadblock, with a one-way trip amounting to at least FC 54,000. These fees, which in effect pay for the deployment of security forces, add to the price of basic commodities in mining areas. As one transporter put it, 'Each

barrier has its amount ... we pay everywhere, and the selling price must rise to recover the losses'.³⁴ This is reflected in the fact that fuel and rice are respectively 30% and 50% higher in artisanal mining sites around Mongbwalu in Ituri than they are at the border with Uganda, from where they are imported.

In the gold mining zone of Shabunda in South Kivu, matters are worse still, with the prices of ordinary consumption goods anywhere from three to five times higher than in Bukavu, where most of them are sourced. This can be attributed to the hefty roadblock fees imposed on trucks taking this national highway – of the FC 2–2.5 million (US\$870–1,090) extracted, around half goes to M23 (see Radio Okapi, 2026b).³⁵

Similarly, there are 14 roadblocks along the Kasugho–Rama path in the southern Lubero jungle, while getting to the more remote Kamaninge site requires passing through an additional six checkpoints operated by local wazalendo factions. As one motorcycle driver in Kashugo explained: 'If this place produced only cassava, there would not be so many roadblocks'.³⁶ In practice, each settlement, river crossing or mining camp doubles as a checkpoint, many of which are 'virtual' in the sense that no physical barrier exists. Artisanal miners – mostly locals – aren't taxed here.

Traders supplying these remote mining sites, however, pay dearly. Nande ambulant traders play a key role in transporting bulky consumer goods along forest paths linking mining camps to trading hubs such as Kasugho and Kirumba. Locally, they are known as *nguya* ('the courageous ones') in recognition of the fact they often carry loads in excess of 100 kilograms for days through the bush, navigating competing authorities to reach the mining sites (see Figure 23). In such areas, those carrying merchandise have to pay as much as FC 30,000 (US\$13) to pass through each roadblock – more when the trader is unfamiliar, and less when he or she is an acquaintance. Beer in particular has a terrible weight-to-value ratio, making it unattractive cargo given the proliferation of roadblocks. Even so, ambulant hawkers continue to lug crates of beer through the forest, gambling that they can barter their load for gold at favourable rates with the military commander in charge. It is typically worth it: as one gold miner claimed, 'The Nande that come from Beni or Butembo to supply our site often make more than us miners ourselves because their business is steady while our production always fluctuates'.³⁷

By levying fees on motorcycles, trucks and traders transporting supplies to mining sites, roadblock operators embed checkpoint rents in the prices of goods consumed by miners without directly interfacing with them. This leads to a distinct pattern of

Figure 23. Porter carrying beer to a remote mining area in Mangurejipa, North Kivu (left) and the receipts that the wazalendo issue for such porters at their roadblocks (top right: MCRP; bottom right: FPP/AP)

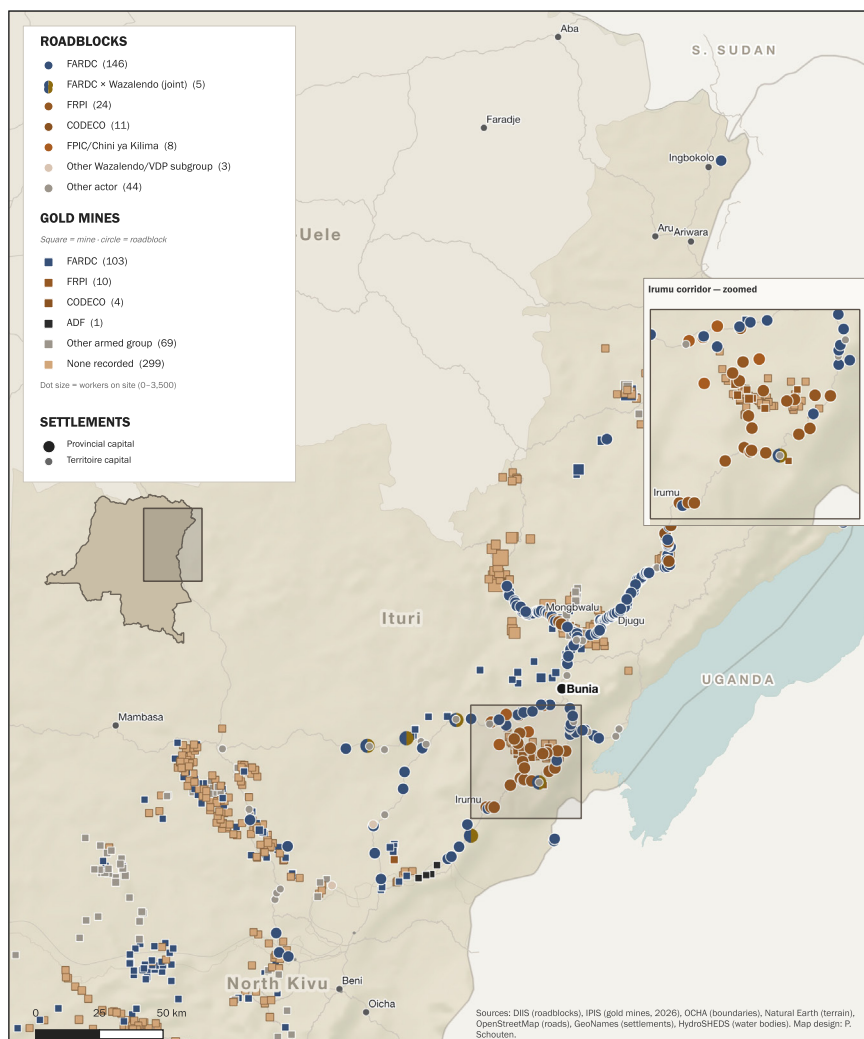


Sources: Courtesy of Saidi Balikwisha (left) and research team (right).

rent extraction from the circulation linking mining sites to regional trade hubs and border crossings. On the one hand, gold moves in relatively frictionless fashion away from the mining areas in the hands of traders who hide their wares and so incur significantly lower roadblock taxes. On the other, difficult-to-conceal food, fuel and manufactured goods flowing in the opposite direction provide the bulk of extracted revenues. For comparison, consumer goods that have travelled from Uganda to mining sites are easily 50–100% more expensive at their destination than at the border, whereas gold that has travelled from mining sites to Uganda is only 20% more expensive.³⁸

According to influential gold traders in Bunia, the arrangements touched on above form part of a broader political settlement in which key business figures have accepted the military's replacing of armed groups protection rackets. A relatively

Figure 24. Who controls Ituri's gold supply chain



Source: Roadblock data by research team (late 2025); mining site data courtesy of IPIS; cartography by P. Schouten (see credits in map for layer source attribution).

light tax on gold is paid directly to the military governor, while foot soldiers are allowed to tax the main routes leading to mining zones. Under this agreement, the Cooperative for the Development of Congo (CODECO) agreed to partially demobilise, though its men retain access to artisanal mining opportunities and the armed group still maintains several roadblocks of its own.³⁹

Armed groups with connections to ethnic territories, such as the Ituri Patriotic Resistance Force (FRPI) and Patriotic and Integrationist Front of Congo (FPIC), operate under a different logic. Having established roadblocks along roads leading up to mining sites within their customary territories, they impose tax on incoming commerce largely conducted by people from other ethnicities. This is accepted by their kinfolk in the mining pits themselves, despite their having to pay for these arrangements indirectly through inflated consumption good prices.⁴⁰

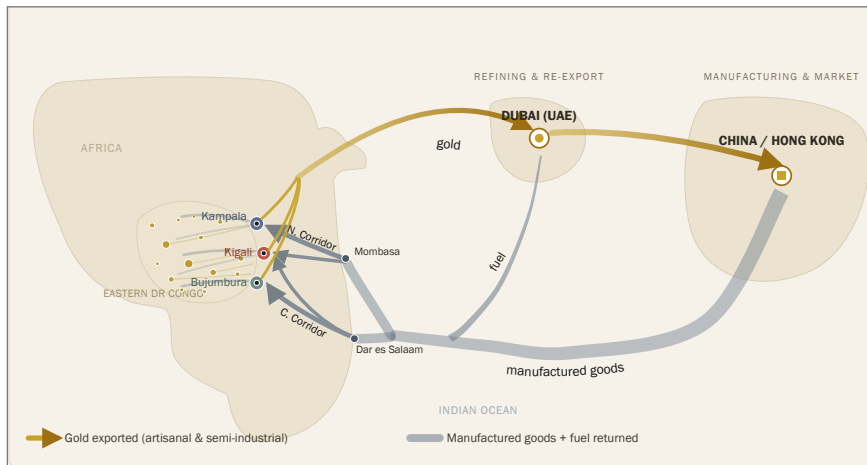
CROSSING THE BORDER: SMOOTH PASSAGE

Once extracted, much of eastern Congo's gold leaves the country through neighbouring states. The fiscal regimes governing gold exports vary significantly across the wider region, creating strong incentives for cross-border smuggling. While the DRC imposes multiple administrative procedures and export taxes on gold shipments, neighbouring countries offer far more enticing conditions: both Uganda and Rwanda have opened gold refineries and offer lower formal taxes than the DRC (Lyster and Smith-Roberts, 2021). Gold traders interviewed for the study confided they are very well received at border posts on both the Congolese and Ugandan side, often travelling via crossings controlled by contacts, likely of the same community. One described how 'On the Ugandan side we either meet our Indian business partners directly to take our gold or there are [military, red.] escorted vehicles waiting to take us to Kampala'.⁴¹

This backdrop has encouraged the laundering of Congolese gold through neighbouring economies, where it is refined and exported as domestic production (see Figure 4 above). Beyond its importance as a commodity, gold is used as a mechanism for transporting value across borders. By converting cash – including illicit wealth – into gold and delivering it to a refinery who takes care of transport, traders can unlock legitimate capital accessible elsewhere in the world. Logistics companies and freight-forwarding services often facilitate this process by structuring shipments and documentation in ways that obscure the origin and ownership of gold flows (Global Initiative Against Transnational Organized Crime, 2026).

For instance, the largest among the dozen or so gold refineries in Kampala is Thaba (formerly African Gold Refinery), allegedly operated by sanctioned gold smuggler Alain Goetz on behalf of figures among the Ugandan elite (Independent, 2026). Official export declarations show that Thaba consigns its gold to a global logistics

Figure 25. Eastern Congo's gold is laundered through Kampala, Kigali and Bujumbura into Indian Ocean hubs – and returns as manufactured goods



Source: Figure by P. Schouten.

firm, which is not the end buyer but a specialist in ‘white gloves’ transport services for high-value goods such as jewellery.⁴² The declarations therefore do not disclose whom its gold is destined for.

One refiner in Uganda explained that most gold travels via the United Arab Emirates to Hong Kong and other Asian destinations, where it is used to purchase manufactured goods that are then shipped to the DRC and exchanged at a profitable rate against more gold.⁴³ In fact, gold traders are almost obliged to double as importers of manufactured goods simply to obtain the Congolese francs necessary to purchase gold. For instance, one large gold trader operating out of Ariwara in Ituri explained that he sends his gold to Dubai. There, he uses the proceeds to purchase diesel and fuel, which is shipped via Mombasa to the fuel stations he operates in gold-producing areas in Haut Uele. The sale of fuel in local currency affords him the Congolese francs necessary to buy gold from artisanal miners.⁴⁴ Through these means, gold links local mining economies in eastern Congo to the much wider Indian Ocean exchange geography. In this exchange circuit, places like Dubai serve as essential offshore financial centres, shielding investors from scrutiny and taxation (Mahjoub, 2025; de Oliveira, 2026).

CONCLUSION

Overall, the movement and taxation of gold mined in eastern Congo is illustrative of how the area's political economy of conflict operates. Rather than handling or taxing minerals directly, armed actors often position themselves along the routes via which value moves. In the case of gold, the mineral itself travels undisturbed, leaving the checkpoint landscape to extract its rents from the labour and commodities sustaining mining economies. Ultimately, it is the artisanal miners who pay for the exactions perpetrated along the entire chain. Thus, gold becomes a mechanism for transferring wealth from unprotected and informal labour to armed actors and already privileged commercial elites.



Women selling cacao at a rural market, Mambasa, 2025 (top); people fleeing ADF attacks (bottom left); cacao pods (bottom right). Photos: research team.

CACAO

Most of the world's cacao is produced in just two West African countries: Côte d'Ivoire and Ghana. In recent years, two consecutive crop failures, combined with policy efforts aimed at raising farm-gate prices, have led to a dramatic surge in global cacao prices (see Vyawahare, 2022). This in turn has fuelled the anarchical expansion of cacao production in new areas, including eastern Congo.

A Mulese cannot cultivate 30 or 40 kilometres from the main road. That is exactly where the massacres are happening.

— A community leader, Walese Vokutu

Much of the frontier expansion in eastern Congo is being driven by entrepreneurial networks originating from the commercial hubs of Butembo and Beni. These are closely tied to the Nande (otherwise known as the Yira) ethnic group, who have traditionally inhabited the Uganda borderlands in the northern part of North Kivu ('Le Grand Nord'). Population growth and prolonged insecurity have, however, prompted many Nande to migrate into the southeastern parts of neighbouring Ituri province. There, they have come to dominate the region's commercial economy, which encompasses timber, gold, bushmeat and, increasingly, cash crop agriculture (see Akilimani, 2022).

Southeastern Ituri's lowland forest areas offer the perfect conditions for cacao (see Katho and Mbabazi Kahwa, 2021: 45). Cacao traders from Beni related that, with cacao prices rising, they pre-finance new plantations by negotiating concessions

with customary chiefs and recruiting seasonal migrant labourers from poor villages back home in Le Grand Nord.⁴⁵ These workers – often young men – are contracted to plant and maintain cacao fields for fixed payments per hectare. A cacao entrepreneur from Butembo with plantations in Irumu explained that one hectare typically earns a migrant caretaker around US\$40 per season, with food and medicines supplied by the patron.⁴⁶ Once plantations begin producing, workers sometimes establish their own small plots nearby.

All this has resulted in a cascading frontier of cacao cultivation. Unlike conventional land grabs driven by corporate actors, this largely unregulated process manifests as anarchic frontier expansion rather than a centrally organised enclosure. As a consequence, significant deforestation has taken place across Ituri (see Figure 27).

Local communities in this part of Ituri have traditionally cultivated land under flexible tenure systems: plots are used for one or several agricultural seasons and then left fallow, with communities rotating cultivation across larger customary territories (Rösler, 1997). Cacao, as a perennial crop, disrupts this system by introducing permanent claims to land. In effect, cacao plantations transform flexible customary tenure into long-term enclosures (INRAE, 2024; see also Kamath et al., 2024).

In many forest communities, the abundance of land meant boundaries were not formally demarcated. As a local customary authority representative in Walese Vokutu explained:

Our grandparents distributed the land poorly. They would simply show someone: you start here at the road and you can exploit the forest all the way to the back. Today some people claim concessions of 40 hectares or more, but the boundaries were never clearly established.⁴⁷

Now, with cacao plantations expanding ever deeper into the forest, competing chiefs sometimes allocate the same land several times over.⁴⁸ The result is overlapping concessions and escalating disputes between migrant cultivators and autochthonous communities, as well as among customary authorities.

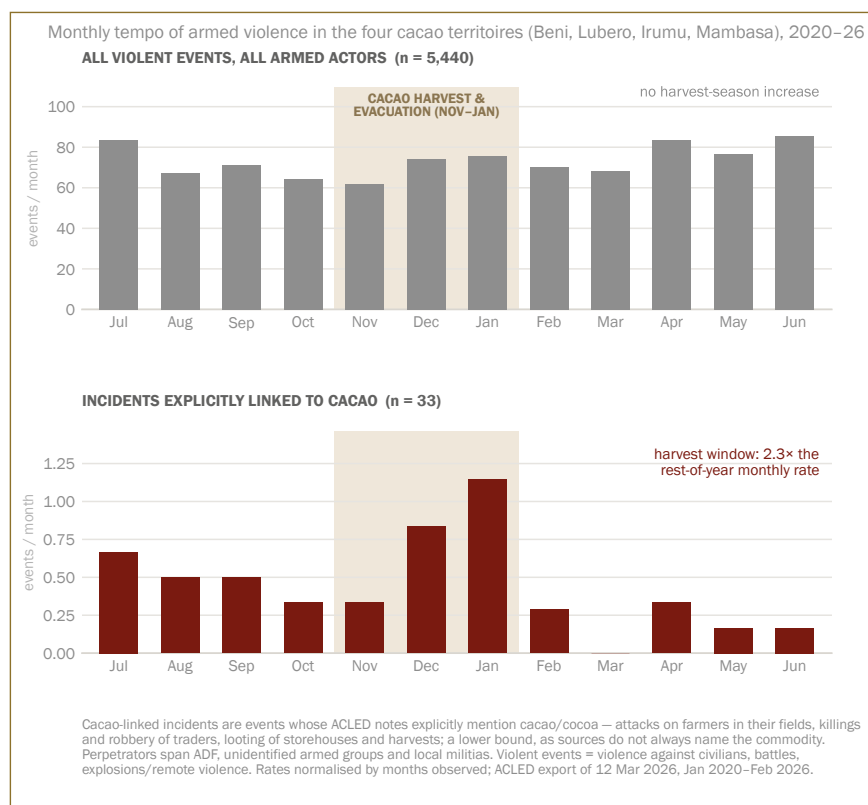
The frontier expansion has also pushed cacao farming further from state authority. Local authorities report that some plantations now begin more than 30 kilometres from the nearest road, despite official attempts to restrict this distance to five kilometres for security reasons. One community leader noted that: 'A Mulese

[member of the ethnic community indigenous to Walese Vokutu, in Irumu] cannot cultivate 30 or 40 kilometres from the main road. That is exactly where the massacres are happening'.⁴⁹

THE START OF THE COMMODITY CHAIN: A THEFT ECONOMY AND RACKETEERING

Cacao is harvested during specific seasonal windows, following which the beans are left to ferment, dried and then placed in sacks. Thus, the crop is not only valuable, but easily stored and relatively simple to transport. These highly lootable characteristics make cacao particularly attractive for appropriation in the eyes of armed actors. Violence in the cacao territories is not itself seasonal, but violence involving cacao spikes during the November–January harvest and evacuation window, rising to roughly two and a half times the rest-of-year rate (see Figure 26, cf. Chober, 2025).

Figure 26. The seasonality of cacao violence

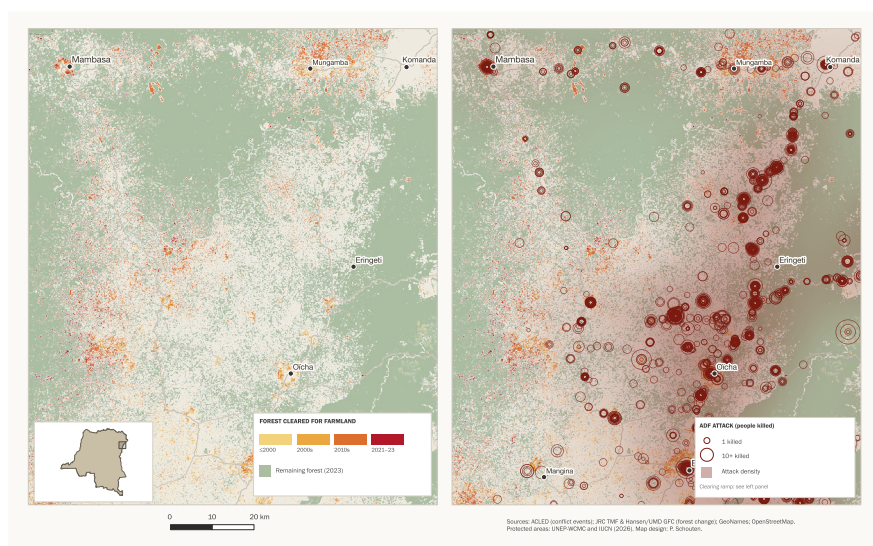


Source: Figure by P. Schouten; conflict events from ACLED (see in-map credits and annex 1 for data attribution).

Cacao cultivation began spreading across the Beni area of North Kivu in the early 2000s. Before long, sporadic theft and violence in and around plantations was being reported during harvest seasons. This took the form of bands of criminals stripping trees of their pods, occasionally killing farmers who attempted to resist.⁵⁰

This proved an endemic trend, but by the early 2020s, there were increasing reports of ADF attacks during cacao harvest periods, with the group taxing cacao farmers for access to their fields. The ADF also engaged in forced cacao cultivation around Oicha (UN Group of Experts on the DRC, 2021, 2022). Others began imitating the group's tactics, stealing cacao while disguising themselves as ADF fighters. These groups – sometimes referred to locally as *sanga belende* – proceeded to sell the stolen beans to traders connected to regional commercial networks. When the Congolese armed forces responded by deploying to cacao-producing areas, they also began levying taxes on local farmers (Deskeco, 2021).

Figure 27. The cacao frontier. Left: forest conversion to farmland on the Beni–Mambasa–Komanda frontier; right: ADF attacks 2020–2026



Source: Cartography by P. Schouten; conflict events from ACLED (see in-map credits and annex 1 for data attribution).

These dynamics are not confined to North Kivu. Military pressure on the ADF – initially from Congolese army operations and later from the joint FARDC–UPDF campaign launched in 2021 – pushed parts of the group westward into Ituri (Kisando, 2026), where Nande farmers were expanding cacao cultivation. As plantations spread deeper into remote forest areas beyond the reach of state authority, so the

cacao production frontier and the geography of ADF presence began increasingly to overlap. In the triangle between North Kivu and Ituri, it is exactly at the frontier where cacao is eating up the forest that the ADF appears most active (Figure 27).⁵¹

Theft has become endemic in the cacao-producing areas of Ituri. Cacao traders, planters and local militia representatives interviewed for the study all believed that the majority of cacao traded in some rural markets originates from theft or forced harvesting. One interviewee summarised the situation in stark terms: 'Out of 100% of the cacao on the market, maybe 90% is stolen'.⁵² Part of this reflects tensions over land enclosure. Autochthonous communities – including Batwa groups – have started harvesting cacao from Nande plantations established on land the communities consider historically theirs. Some justify this to be a 'weapon of the weak' or form of restitution (Scott, 1985). One customary authority representative explained, 'The youth doing this tell us: this is our land, we have to consume it together'.⁵³

Theft increasingly involves organised actors as well. Traders sometimes hire intermediaries to harvest cacao from remote plantations, a practice that has become normalised in some areas (Radiélimu, 2025). One militia representative was particularly blunt in described this dynamic: 'On Sundays when you are at church, I go harvest your field. Or I send pygmies to harvest it. Everyone does it now – the local youth, the Nande, everyone'.⁵⁴ Several reports confirm that cacao theft has become more organised. Networks of young men – sometimes involving minors or Batwa – are mobilised to harvest plantations illicitly, while local militias or criminal gangs occasionally disguise their attacks as ADF operations (Chober, 2025). Thus, while the ADF is a threat to many, its presence presents an opportunity for others (Titeca and Salvaggio, 2026).

The prevalence of theft has altered farming practices. Now, farmers often harvest pods prematurely to avoid having their crop stolen during fermentation periods, when beans remain in the fields. As a result, much of eastern Congo's cacao reaches markets in an immature condition, degrading its export quality.⁵⁵ Alongside this, the spread of cacao cultivation has reshaped armed mobilisation patterns, with the expansion of the ADF into cacao-producing zones prompting communities that had previously remained outside militia politics to organise self-defence groups.

Whenever ADF units settle (often temporarily) in a zone, they impose registration fees for farmers entering their fields – typically around US\$25 per hectare and US\$10 per worker. As part of this regime, monthly tax receipts (*jetons*) are issued

granting access to plantations (see Figure 28, cf. Actu7.cd, 2026; Visibilité Média Pro, 2025). Locals observed that such practices are a relatively new development for the ADF, having previously been more common among Nande armed groups: 'That's why today we talk about *ADF-supplétifs* – are they ADF behaving like Congolese armed groups or Congolese armed groups pretending to be ADF? We don't know'.⁵⁶

Figure 28. Jetons issued by the ADF (left) and local militias (right) to cacao farmers, Mambasa



Source: Photos by research team (2025).

Part of why it has become difficult to know is that local ethnic militias and Nande armed groups have responded to the ADF expansion by setting up their own protection rackets, leading to the cacao frontier becoming ever more intertwined with ethnic and territorial competition (Bunia Actualité, 2025). In areas such as Walese Vokutu in Irumu and the Bapere sector in Lubero, local militias have emerged not only as a response to ADF violence, but also to resist the expanding enclosure of land by Nande commercial networks.⁵⁷ Nande cacao planters have in turn called on their 'youth' to defend them against both the ADF and local militias.⁵⁸ As one Nande cacao planter put it:

Our associations make sure that some of our youth are present at the plantations but also the markets to dissuade all these groups from harassing us. Otherwise, it would be impossible to operate here. You know the Walese Vokutu invited us to help develop their unused land but now that we are making money they reproach us.⁵⁹

Further adding to the confusion are local youth associations that create 'private security companies' to protect cacao farmers, but which are most active around harvest time when they erect roadblocks to get paid for their 'services' (Radio Moto, 2025). Farmers suspect they are another front for local armed groups.⁶⁰

Government forces purportedly deployed to fight the ADF are often perceived as part of the problem, with locals reporting fees in the range of FC 10,000–15,000 each time they pass through their improvised military roadblocks, adding to the taxes already imposed by the ADF.⁶¹ Several interviewees alleged that FARDC officers periodically prohibit farmers from accessing plantations during harvest periods under the pretext of ADF threats, only to harvest the cacao themselves:

A typical example is that the soldiers order the entire population to leave the area because of alleged ADF threats, saying they need to pursue them. If you go back to your field, you will be considered ADF. When we finally return, there is no more cacao left in the field. Then their commander comes to us and says: 'I know you're a buyer – you must buy the product you yourself planted'. He has an AK-47 – what are you going to say?⁶²

On a similar note, a local militia member claimed, 'Today, almost every FARDC officer and policeman has become a cacao trader'.⁶³ Against this backdrop, it is often difficult for civilians to distinguish between different armed actors, while rumours of collusion between the ADF, militias and army commanders are rife.

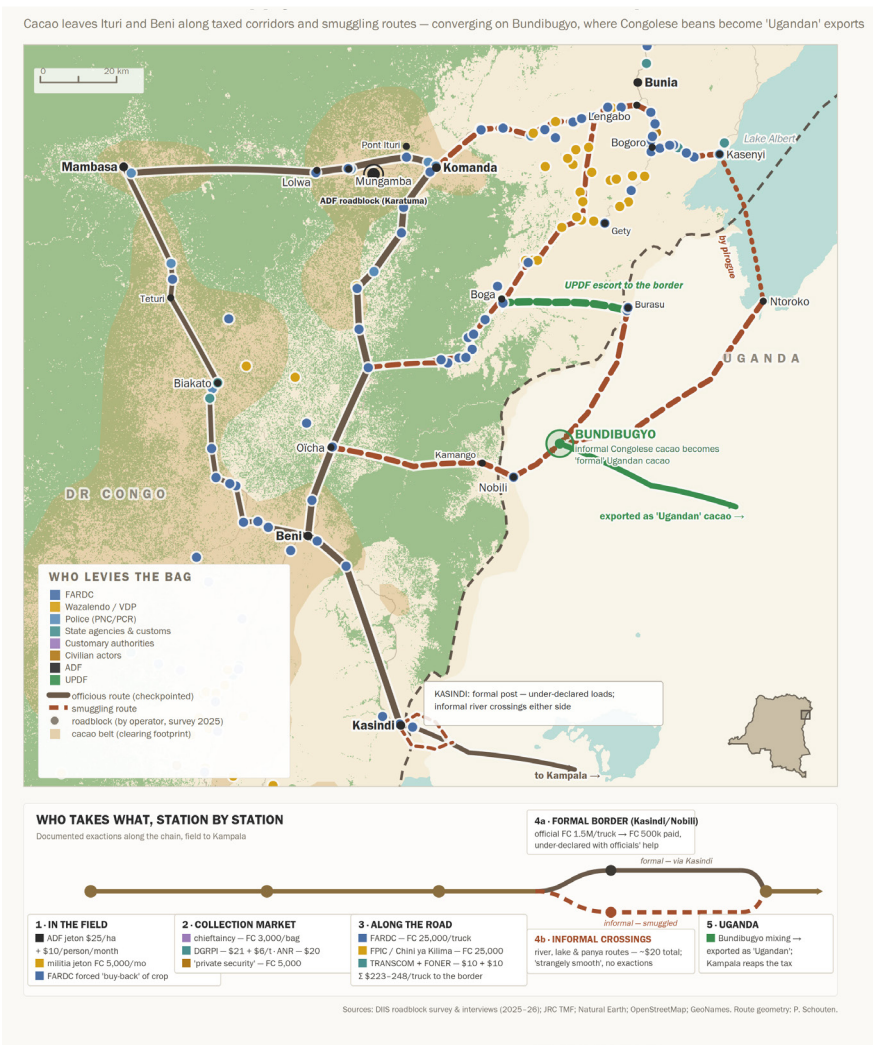
ALONG THE COMMODITY CHAIN: NAVIGATING THE CHECKPOINT ECONOMY

A dense network of checkpoints operated by various state agencies, militias and local authorities mark the routes along which cacao is transported. At least 34 roadblocks line the route from Mungamba to the ports of Kasenyi and Tchomia on Lake Albert. Elsewhere, the corridor towards the Kasindi border crossing features some 19 checkpoints (see Figure 29).

Transport costs accumulate rapidly. A truck carrying cacao from Mambasa to Beni typically pays US\$223–248 in checkpoint taxes before reaching the border with Uganda. Motorcycle transporters, meanwhile, pay FC 3,000 (approx. US\$1.3) per bag of cacao beans at each barrier. In total, up to 20% of the value of the cacao is swallowed up by such fees, further incentivising the avoidance of formal border

taxes further down the line. Worse still, these fees increase sharply during harvest seasons, when armed actors often intensify their exactions and demand additional payments in kind – typically one kilogram of cacao for each peasant or motorcycle carrying cacao (see Radio Okapi, 2025b).

Figure 29. Exactions along the cacao supply chain



Source: Roadblock data and routes by research team (late 2025); cartography by P. Schouten (see credits in map for layer source attribution).

A small-scale trader described the effect of these taxes: 'If a bag of cacao is worth 50 dollars and you expect five dollars profit, they will demand ten'.⁶⁴ He went on to say, 'We can hardly negotiate the price with those we sell to, so we are forced to buy cheaply'. Cacao buyers admit to offsetting the costs of higher roadblock taxes by paying lower prices to farmers. For many traders the cumulative burden of checkpoint taxation makes independent trading impossible. As one trader explained: 'You have two choices: either sell your cacao to the depot of one of the big trading houses like ESCO at a low price, or diversify into something else – plant cacao yourself or trade gold'.⁶⁵

Nande cacao traders, who tend to bear the brunt of checkpoint taxes, unsurprisingly view the roadblocks as an onerous burden. Countering this view, some of the local militias operating roadblocks claim the system ensures a cacao economy dominated by 'outsiders' contributes to the local economy.⁶⁶

CROSSING THE BORDER: THE LAUNDERING OF CACAO

Whereas cacao produced in western parts of the DRC is exported through the Congo River to Kinshasa, eastern Congolese cacao is almost entirely exported through neighbouring Uganda. This is partly driven by the absence of affordable transport connections between the east and the capital, thousands of kilometres away. Moreover, cacao prices are generally higher in Uganda than in the DRC, creating strong incentives for cross-border trade.

At the same time, formal export procedures in the DRC are expensive and bureaucratically complex: in some cases, the cost of paying the 22 official taxes adds up to 25% of the value of shipments (Congo1.cd, 2026). Most traders therefore avoid official channels. As one Ugandan cacao trader advised, 'Don't go to Congo to buy cacao if you don't have anyone at the border. You will not manage and you will regret it'. He added that anyone paying all the official taxes 'must be stupid'.⁶⁷

Interviews with Congolese border officials and Ugandan cacao traders suggest that circumventing official export taxes is achieved through two different strategies, the choice depending on the size of the consignment. Larger consignments are transported to official border crossings such as Kasindi, where exporters bribe officials to declare lower volumes and reduce taxes (see Radio Okapi, 2026c). In this way, transporters driving a fully loaded truck of cacao that would require FC 1.5 million (US\$660) in official border taxes might only pay FC 500,000 (US\$220).⁶⁸

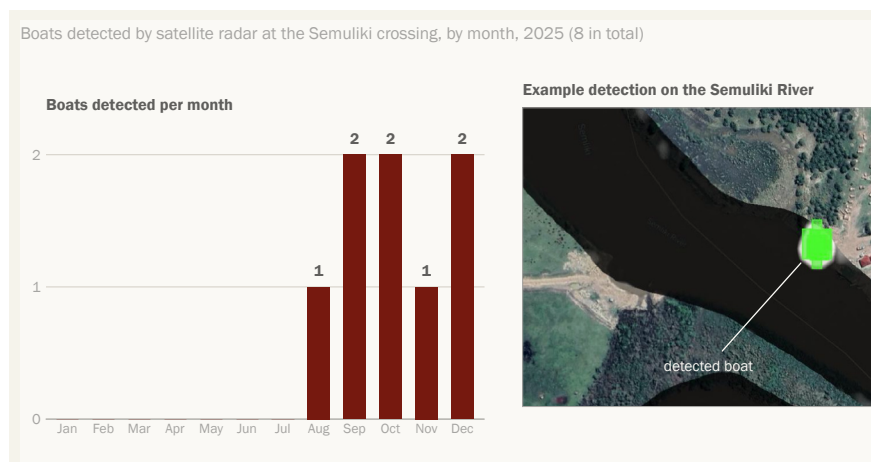
Regular cacao transporters and traders confirmed that they periodically arrange to declare the full amount with border checkpoint operators in order not to arouse the suspicion of their superiors.⁶⁹ Kasindi customs officials added that Congolese army commanders often help traders transporting big consignments of cacao circumvent the border post.⁷⁰ All this under-declaring and circumvention means official cacao export and taxation statistics from different government agencies vary wildly when compared with each other – as a rule, they capture only a small percentage of actual cross-border trade.

Meanwhile, smaller consignments are moved along routes that are purposefully kept informal, such as water crossings along the Semuliki River next to the formal Kasindi border post. In this case, motorcycle taxis or small trucks bring the cacao to the Congolese side of the river, while equivalent vehicles wait to pick up the bags on the Ugandan side. The customary chief runs the only barge, allowing him to profit handsomely from this monopoly on cross-river transportation.⁷¹ Alternatively, it is possible to transport the cacao via Lake Albert ports such as Kasenyi and Tchomia. Here, canoes transport sacks across the lake to the Ugandan port of Ntoroko, where trucks carry the beans inland (see Figure 29 above).⁷² One trader from Boga – a Congolese town in Ituri close to the border – explained that Ugandans often come directly to Boga in order to pre-finance cross-border cacao and timber shipments (see Blanshe, 2024). He added that some of his colleagues also make use of UPDF escorts from Boga to the border.⁷³ The crossing of the river Semuliki is controlled by the local customary chief, who levies FC 5000 or more for any river crossing. Analysis of satellite image time series suggest that these crossings increase in frequency during peak cacao harvest season (see Figure 30 below).

From these informal border crossings, the cacao takes what are called *panya* routes in Uganda: small paths that avoid most of the formal government checkpoints. As one seasoned small-time Ugandan cacao trader explained: ‘Whenever I go to the Congo border to pick up cacao I usually pay the local community leaders US\$20 just so they don’t report me, otherwise it is smooth sailing’.⁷⁴ In contrast to the cacao feeder roads, which are densely infested with roadblocks and exactions, the cross-border portion of the supply chain is therefore relatively smooth and devoid of exactions.

Having arrived in Uganda, the Congolese cacao is frequently mixed into Ugandan production processes and exported as Ugandan cacao. Bundibugyo district – officially responsible for around 70% of Uganda’s cacao production – has become a key node in this laundering process. Cross-border traders who supply the big

Figure 30. The Semuliki border crossing and the chief's levy



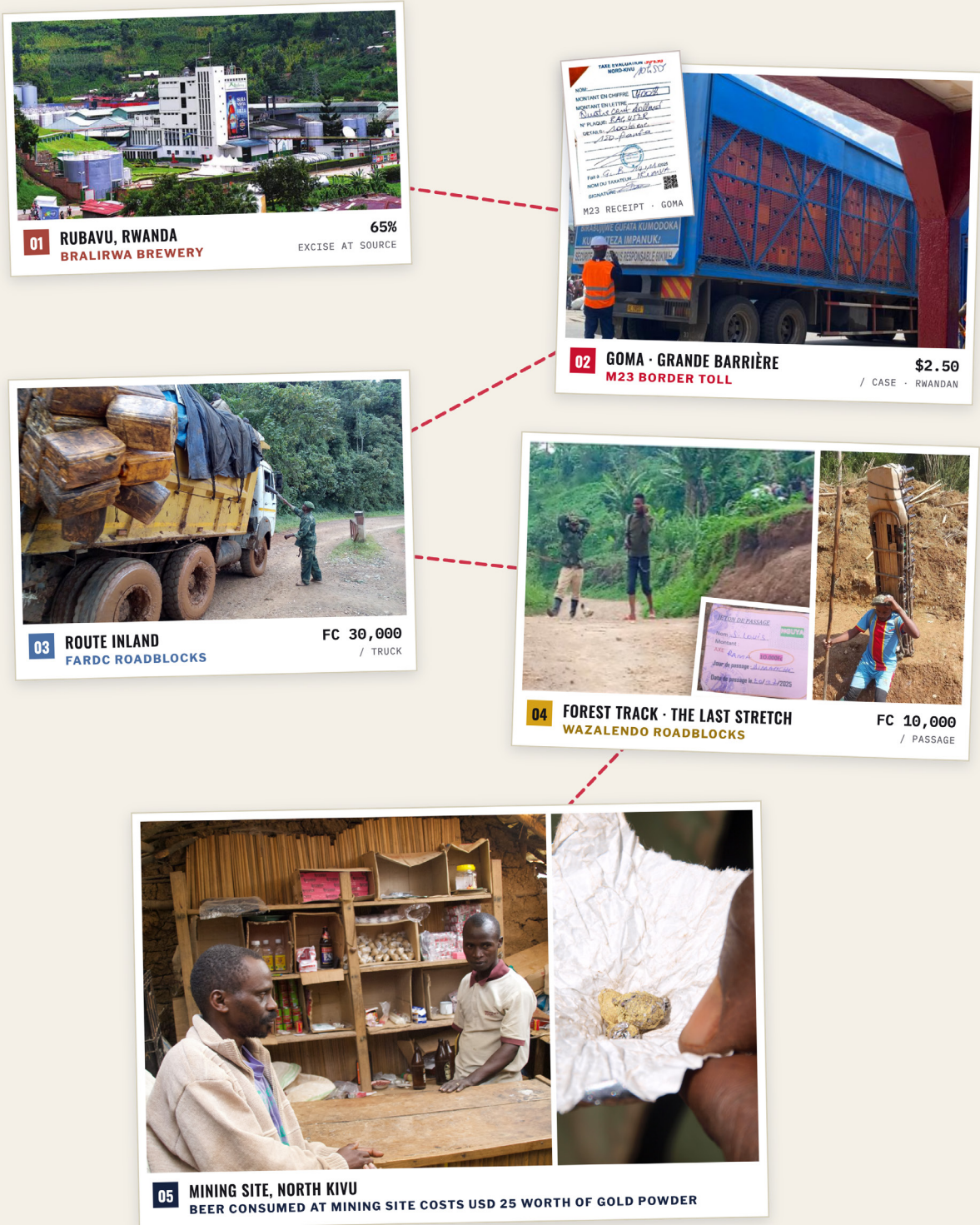
Source: Analysis using Synthetic Aperture Radar (SAR), imagery from Sentinel-1 (Copernicus) data (2026). Note: Remote sensing analysis shows that the frequency of boat trips appears to fluctuate with the seasonality of cacao, peaking between November and January.

exporting houses maintained that export companies operating in the region never ask for the origin of beans, allowing Congolese cacao to enter global markets as Ugandan produce, with the associated taxes reaped by the Ugandan regime.⁷⁵ The industry certification schemes that help grant access to formal Western markets (such as the Rainforest Alliance's cocoa certification programme) are not designed to capture these supply chain realities.

CONCLUSION

The cacao boom has produced not only new plantations in eastern Congo, but a complex political economy linking global markets to local systems of extraction. A surge in global cacao prices has enticed investors, migrant labourers and commercial networks into territories where state authority is thin and customary tenure contested. As plantations spread, they transform flexible land relations into permanent land claims, provoking disputes that are readily exploited by armed actors. The result is a frontier dynamic in which the commodity's value – which draws in militias keen to exploit the cacao frontier – actively generates the insecurity surrounding it. In most cases, it is the small-scale cacao farmers who end up footing the bill for protection fees and local cacao prices depressed by the roadblock taxes traders face along the commodity chain.

Figure 31. The journey of a bottle



Sources: Figure by P. Schouten; photos from the research team, Saidi Balikwisha, and anonymous sources (2025-2026).

BEER

The political economy of eastern Congo's regional conflict is most often analysed through the lens of mineral extraction, with neighbouring countries vying to profit from the coltan, gold and cassiterite moving out of the country into global supply chains. Considerably less attention has been paid to 'licit' manufactured goods transported into conflict economies – or, more specifically, regional competition for access to Congo as a consumer market, with knock-on effects for instability in Congo. This chapter uses beer as a prism for that analysis. Not only are the consumption taxes levied by central government on breweries carried all the way to the consumer, the fact that the bottles must be physically transported to those very consumers renders beer highly vulnerable to further taxation at checkpoints and borders. As such, control over its distribution has outsized financial consequences on all sides of the conflict in eastern Congo.



Five men on a footpath thus take more from the bottle than the Rwandan treasury does.

People in eastern Congo like to quip they have 'la bière à l'ouest, la guerre à l'est' ('beer in the west, war in the east'), but this isn't entirely true. Eastern Congo – with its relatively high population density – accounts for nearly a third of all beer consumed in the DRC (Rolley, 2025). The cities of Goma and Bukavu each comprise well over a million inhabitants, many of whom are beer drinkers. As such, the roads leading towards them represent a prize not only for armed groups extracting rents at

roadblocks, but for neighbouring governments whose own breweries – and fiscal revenues – depend on access to Congolese consumers. What follows is a story of three governments waging a cross-border war over beer taxes, with M23 acting as broker.

THE START OF THE COMMODITY CHAIN: BREWERIES AS A KEY FISCAL FOUNDATION

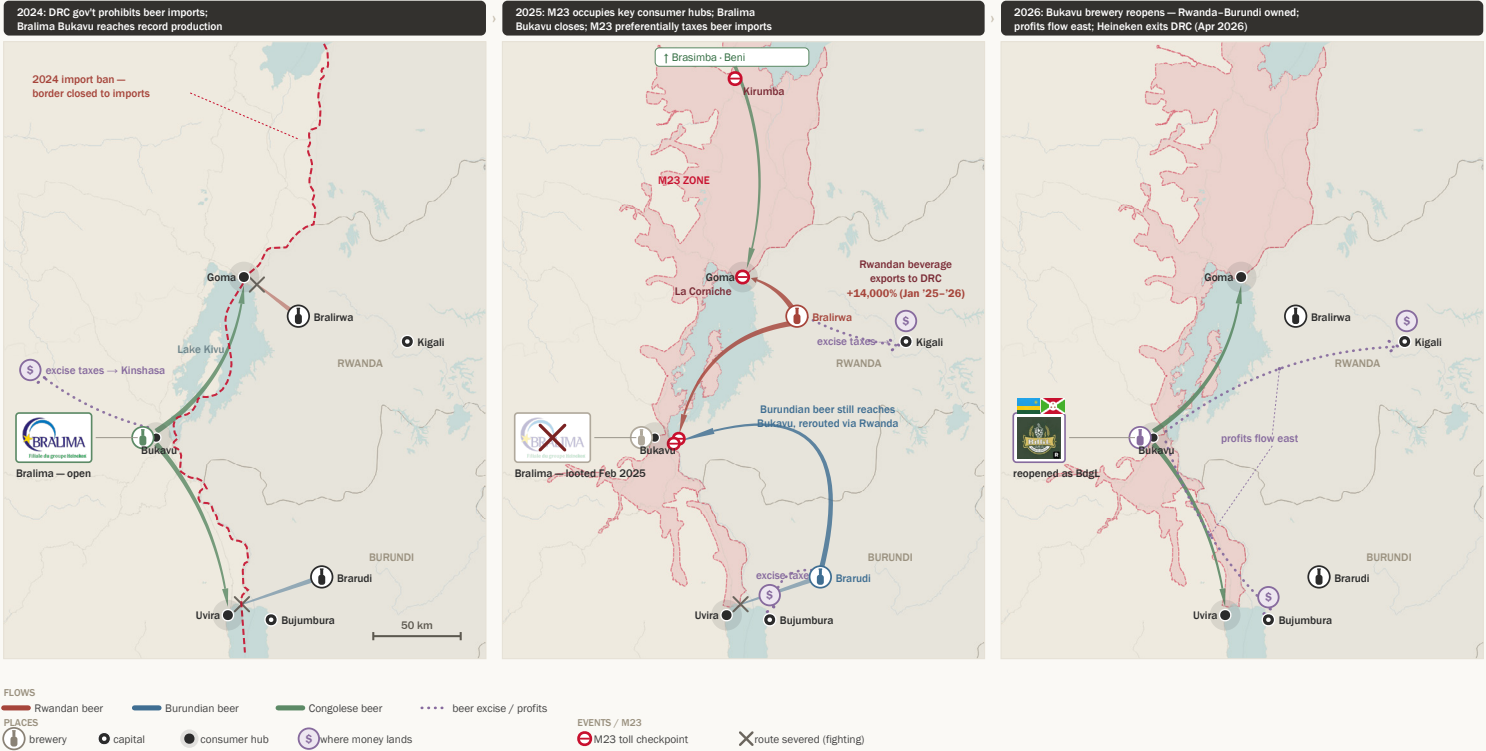
Breweries are central to the public finances of all three countries involved in the eastern Congo conflict – namely, the DRC, Rwanda and Burundi. A single Heineken subsidiary (or in DRC's case, former subsidiary) dominates the national market in each of these countries, constituting a key pillar of government revenue via various taxes (van Beemen, 2019). Consumers pay those taxes embedded in the price of every bottle. In other words: the more the beer flows, the more the government's coffers are filled. In countries with narrow, poorly diversified tax bases, this dependence is often acute (see Gwaindepi, 2023). This is certainly true of the DRC, where bottled beer is one of the principal sources of indirect fiscal revenue.

Bralima – the DRC's largest brewing and soft drink company – is a key taxpayer. Its Bukavu brewery alone paid more than US\$1 million each month to the national tax authority (DGI), and more than US\$1 million again to the customs authority (DGDA) in import duties and excise (Radio Okapi, 2025c). That plant in South Kivu was – up until it was ransacked in early 2025 – the single largest financial contributor to the province's formal economy, paying approximately US\$400,000 per month in provincial consumption taxes; covering more than 60% of the revenues of the local water utility REGIDESO, and as much again of those of the electricity utility SNEL (Rolley, 2025). Its economic footprint extended further still: the brewery was the anchor customer for a dedicated rice supply chain sustaining an entire paddy-farming industry in the Ruzizi plain (Mkulima, 2025). With Goma, Bukavu and Uvira together constituting roughly a third of Bralima's entire Congolese market, the government in Kinshasa had every reason to protect these urban beer markets.

In Burundi, where there is a chronic shortage of dollars, the fiscal role played by the country's main brewery is even more pivotal. Brarudi – 40% state-owned and 60% owned by Heineken – is 'the principal supplier of money to the government' (Kwizera, 2024), providing 45% of total tax revenues and 25% of government salaries.⁷⁶ Since 2014, the brewery has sought to export beer to the DRC in order to obtain foreign

Figure 32. The regional beer war, 2024–2026, in three acts

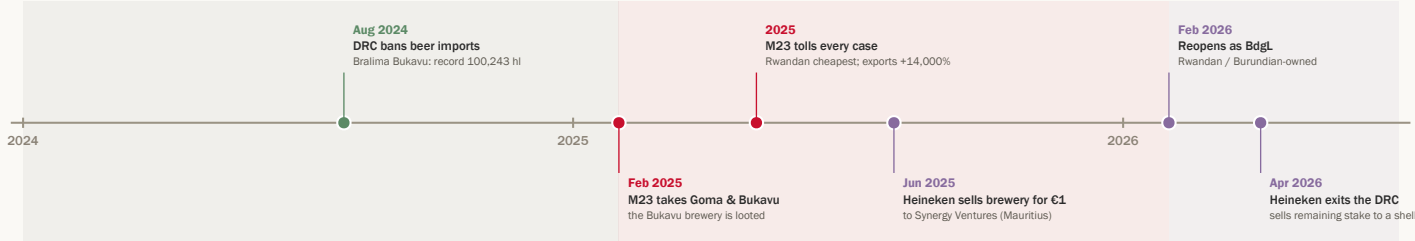
How M23 turned the cross-border beer trade into a toll gate — redirecting Congo's beer excise taxes toward Kigali and Bujumbura.



The Regional Beer War — a timeline

How control over eastern Congo's beer trade shifted, 2024–2026.

PHASES: ● before (2024) ● M23 gatekeeper (Feb 2025 – Jan 2026) ● the capture (from Feb 2026)



Sources: Figure and cartography by P. Schouten, based on data by research team; M23 control layer courtesy of IPIS.

Figure 33. After the Congolese government announces a suspension of beer and soft drink imports (left), Bralima Bukavu celebrated record production (right)



Sources: Left: official announcement (Ministère du Commerce Extérieur, DRC, 2024); right: photo by research team.

exchange and buy the raw materials necessary to keep the brewery running (Kwizera, 2024). Beer, in Burundi's political economy, therefore functions as a foundation for government revenues, foreign exchange and, in all probability, personal wealth.

In Rwanda, excise duties on beer account for 38% of total excise revenues, with soft drinks – another product of the national Heineken subsidiary Bralirwa – contributing a further 10% (Rwanda Revenue Authority, 2024). The scale of Bralirwa's fiscal contribution to the Rwandan government budget was formally recognised when the Rwanda Revenue Authority awarded it the 'Overall Best Taxpayer' prize in 2023 (Rwanda Revenue Authority, 2023). Beyond its domestic fiscal role, Rwanda has been developing Bralirwa as an export vehicle as a means of offsetting its unusually large trade imbalance (Fuje et al., 2026).

Official UN Comtrade data shows that Burundi and Rwanda have drastically increased their share of the eastern Congolese consumption market in recent years, with beer exports from both countries to DRC growing tenfold between 2019 and 2023.⁷⁷ Anticipating further growth in exports, Bralirwa even expanded the production capacity of its Gisenyi brewery – situated directly on the border with the DRC – in 2024 (African Marketing Confederation, 2024).

It was against this backdrop that Congo's trade minister Julien Paluku ordered a one-year suspension on beer and soft drink imports in 2024 (Figure 33, see Ministère du Commerce Extérieur, DRC, 2024). The measure was intended to not only protect the domestic brewery industry – central to government revenues – but address Congo's ballooning foreign exchange deficit and reassert Kinshasa's control over indirect tax

flows. At the time, imported beers were being taxed in decentralised ways by corrupt officials at distant border posts, whereas Bralima was paying its taxes directly into central government accounts. The ban thus promised to defend Congolese breweries against cheaper regional competitors while centralising rents siphoned off by provincial and informal intermediaries.⁷⁸

ALONG THE COMMODITY CHAIN: M23'S BEER BOTTLENECK

The import ban shut down the booming beer export trade enjoyed by Congo's neighbours just as it was reaching its peak.⁷⁹ Mere months after the suspension, Bralima's Bukavu brewery celebrated a new record: over 100,000 hectolitres of beer brewed in just one month – the equivalent of 15 million bottles. However, the achievement proved to be short lived. In February 2025, M23 captured Goma and Bukavu. During the ensuing chaos, the Bukavu brewery was looted, and Heineken, citing force majeure, suspended operations (Heineken, 2025a).

The closure of the Bukavu brewery and the collapse of the DRC government's import restrictions created a beer vacuum that Rwanda and Burundi rushed to fill. M23 in turn positioned itself as gatekeeper determining who got access. A senior M23 official in South Kivu, speaking on condition of anonymity, described what happened in the weeks after the group entered Bukavu: 'I suddenly received visits from certain Rwandans and Burundians, with well-stuffed envelopes, asking me to grant their country's products preferential access to the liberated area'.⁸⁰

Given that M23 is heavily interwoven with the Rwandan military, and in light of the fact Burundi had aligned itself militarily with the Congolese army, the group decided to grant preferential access to Rwandan beer while penalising Burundian imports. Testimonies from beer traders in Bukavu and Goma, backed up by receipts seen by the authors, show that since then M23 has taxed Rwandan beer at US\$2.50 per case at the border, compared to US\$10 per case for Burundian beer.⁸¹ Traders from Goma also explained that Congolese beer arriving from elsewhere in the country – such as the Castel-owned Brasimba brewery in Beni – is currently taxed at US\$3 per case at the first checkpoint entering M23's zone of control.⁸²

The impact of these developments on Rwanda and Burundi's otherwise tiny economies should not be underestimated. Rwanda's statistical office claims a hefty 14,000% increase in beverage exports between January 2025 and January 2026 (National Institute of Statistics of Rwanda, 2026). Meanwhile, shortly after M23's

Figure 34. Rwandan truck loaded with beer crossing the M23-controlled border to Goma, DRC, taken after the M23 occupation (left) and Rwandan beer being unloaded at a bar in Bukavu (right)



Sources: Photos by research team (2025).

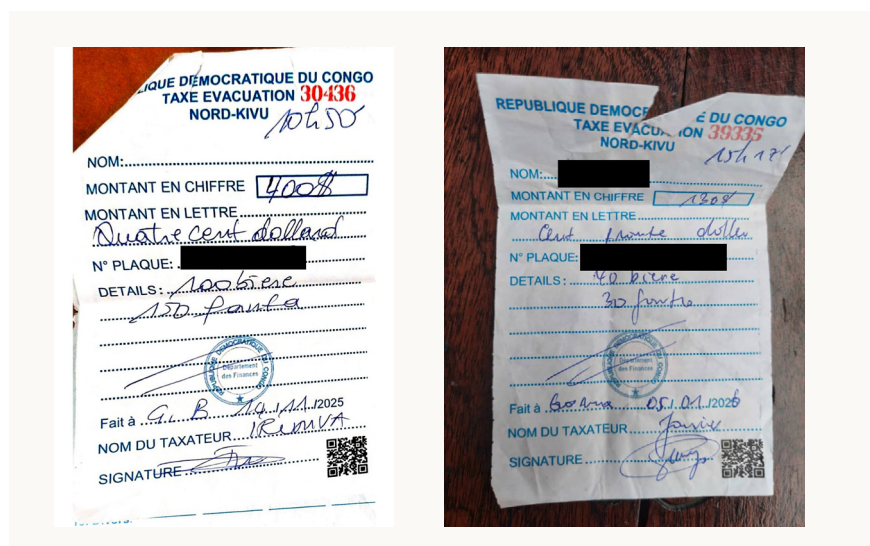
discriminatory tariffs came into effect, Brarudi was forced to raise the price of its products by 40%, citing increased raw material prices (SOS Médias Burundi, 2025). These figures point to M23's role as a vehicle for Bralirwa's forceful capture of the Congolese consumer market. As such, M23's beer tax regime – alongside the prospect of the group pushing further to the south and taking over the remaining border crossings between Burundi and Congo – presents an existential threat to the Burundian government: if the Brarudi brewery were to fail in its attempts to obtain forex, almost half the government's budget would fall away.

Beer traders in Goma described crossing the border into Gisenyi, where Rwandan entrepreneurs run depots stocked with beer from the nearby Bralirwa brewery. Here, some 2,000 cases (60,000 bottles) of beer are, according to conservative estimates, imported every week through Goma's Grande Barrière border post.⁸³ In Bukavu, a handful of Rwandan entrepreneurs monopolise the cross-border supply chain: one operator alone ran three trucks twice a week, each carrying 1,800 cases of beer across the border (a total of around 10,800 cases imported per week).⁸⁴ Rough calculations based on these figures suggest that M23 collected approximately

US\$240,000 in beer customs revenues from Goma over the course of 11 months, and upward of US\$1.29 million from Bukavu just from the one trader mentioned. As there are reportedly two or three other operators of comparable scale active in the city, M23 will have gained at least US\$3 million in beer taxes from Bukavu alone.⁸⁵ Asked for details and offered a right to reply, Heineken responded by repeating main elements of their formal press releases (see Annex 4.2).

While such figures may seem relatively small compared to the US\$800,000 that M23 reportedly makes each month in levies on mineral exports (UN Group of Experts on the DRC, 2025a), it should be borne in mind that the US\$2.5 levy imposed on a case of Rwandan beer constitutes 20% of its retail price – a higher rate than that imposed on the minerals exported by the group.⁸⁶ Ultimately, given beer traders and transporters incorporate these levies into the sale price of cases, it is consumers in Bukavu, Goma and further afield in eastern Congo who end up paying for them.

Figure 35. M23 tax receipts for Rwandan beer issued at the Goma border post



Sources: Photos by research team (2025, 2026). Notes: Receipts from confidential informants. Receipt no. 30436 (2025) records 100 crates of beer and 150 crates of soft drink for US\$400; receipt no. 39335 (5 January 2026) records 40 crates of beer and 30 crates of soft drink for US\$130. Both resolve exactly to the trader-reported M23 rates of US\$2.50 per crate of Rwandan beer and US\$1 per crate of soft drink. M23 issues on Congolese state receipt books headed 'République Démocratique du Congo / Taxe Evacuation / Nord-Kivu'; the printed QR code resolves to M23's own site.

M23 has also reduced internal business taxes in an effort to further promote the penetration of Rwandan business into Congolese markets, thereby increasing the volume of imports on which it collects customs revenue. Beer merchants report paying just US\$5 per month for beer depot licences – far less than the slew of

unpredictable fees previously imposed by Congolese government agents – and note that having cleared customs there are no further roadblock taxes within M23-controlled territory. As one trader put it: ‘Before, we were very harassed – FC 30,000 in roadblock taxes between Goma and Kiwanja, which is the value of a whole case of beer!’⁸⁷

THE MARKET: CAPTIVE CONSUMERS

A significant portion of the beer imported through M23 territory continues its journey towards inland urban centres or remote mining zones. Upon exiting M23-held territory, a truck carrying beer is met with a flurry of FARDC and wazalendo roadblocks. Congolese government forces and allied wazalendo militias in North and South Kivu maintain a de facto blockade on Rwandan beer, systematically confiscating any bottles found at their checkpoints. Only beer from allied Burundi or Congolese beer from more distant breweries is allowed through.⁸⁸

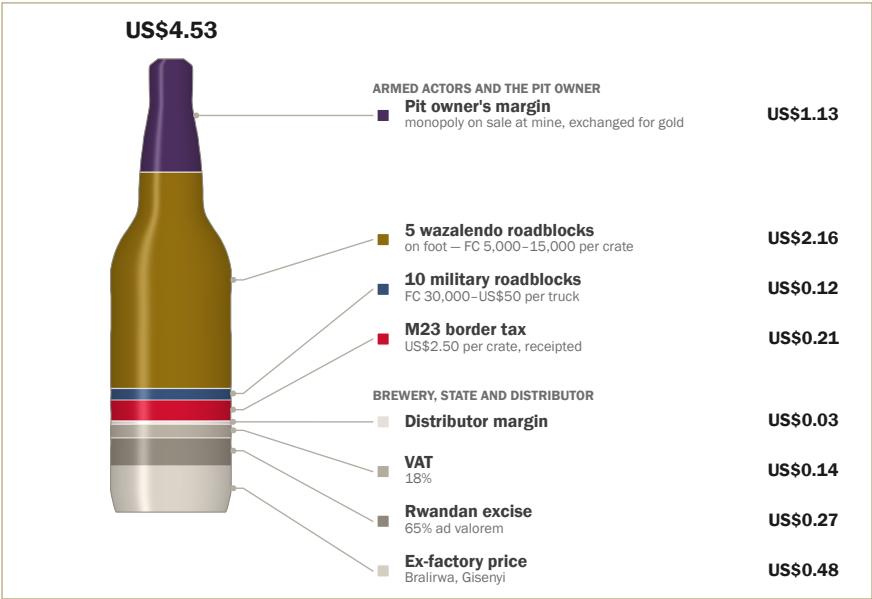
An incident in South Kivu illustrates how this plays out on the ground. On 1 March 2025, a trader accompanying his 15 motorcycles laden with Rwandan beer was stopped at a roadblock operated by wazalendo and FARDC forces on the Bukavu–Kisangani road. The trader was forced to pay a US\$250 fine and had five crates of Turbo confiscated.⁸⁹ ‘Loyalist’ roadblock operators are particularly suspicious of beer, having learnt that beer traders in Bukavu often peel off labels identifying beers as ‘Rwandan’ before shipping the bottles onward beyond M23-held territory.⁹⁰

The deeper one gets into the remote rural fiefs where varying configurations of wazalendo, army commanders and traditional authorities hold sway, the greater the monopolisation over beer sales exerted by the powers that be. As one community elder explained, ‘It is the military families in our area who sell beer, and who own the scant beer depots in our villages’.⁹¹ One armed group, the FPP/AP, even decreed a dedicated levy on beer in the remote area it controls (see Annex 4.3).

As touched on in the chapter on gold, this is where the mineral and beer economies overlap, with the latter offering a useful means of extracting wealth from the otherwise elusive artisanal gold mining economy. At remote mining sites, the price of a beer is inflated beyond even what can be justified by the strings of roadblocks encountered on the way: it is not uncommon for a bottle of Primus, which retails at just over a dollar in Goma, to cost the equivalent of US\$25 in gold powder. Essentially, these local authorities are replicating the fiscal logic implemented by M23 in urban

areas: monopolise the beer supply in order to extract indirect taxes. Thus, when an artisanal miner finally purchases a bottle at the end of a hot day, he is paying for taxes imposed by the local militia leader; taxes extracted at wazalendo and army roadblocks along the way; taxes taken by M23 at the border; and Burundian or Rwandan government levies on the originating brewery.

Figure 36. What a bottle pays between brewery and consumer: accumulated tolls along the route



Source: Figure and calculation by P. Schouten; ex-brewery price from Bralirwa circular DIV N°048/GD.1640/2025 (18 December 2025); bottle image, research team.

Decomposed, the bottle carries more roadblock tax than state tax. This can be illustrated at the hand of a typical journey (Figure 36): A Rwandan-brewed beer leaves the brewery at US\$0.48 and pays US\$0.27 in Rwandan excise. M23 then adds US\$0.21 in customs taxes at the Congolese border. The ten military roadblocks it passes on the highway after leaving M23 territory add at most US\$0.12 between them, because a truck spreads each levy across hundreds of crates. The last five wazalendo barriers, crossed on foot where the road stops being a road, add between US\$0.72 and US\$2.16 per bottle. A dozen men on a footpath thus take more from the bottle than the Rwandan treasury does. These figures trace one typical journey rather than an average across the trade: the total tax per bottle depends on the route it takes and on how many roadblocks it encounters along the way.

THE PRIZE: DIVIDING UP THE GOLDEN CALF

A year after Bralima's Bukavu brewery was looted in February 2025, it reopened its gates under the name 'Boissons des Grands Lacs', releasing a steady flow of trucks laden with beer crates onto the battered roads of the town.⁹² Patriotic inhabitants who had had to suffer a year of drinking Rwandan beer celebrated the reopening of the brewery as a '*retour à l'authenticité*' – a playful reference to Mobutu's 1970s decolonial agenda. As one enthusiastic beer-drinker related: 'That evening when we could drink our first Congolese beers again, it was a serious party, and more than one tear flowed over the course of the night'.⁹³

The ownership behind the reopening is less straightforward than it appears. In November 2025, Heineken formally transferred ownership of the Bukavu brewery for the nominal sum of €1 to Synergy Ventures Holding Ltd, described in a press release as 'a Mauritian company owned by a group of entrepreneurs and operators with experience in the Region' (Heineken, 2025b). Mauritian filings record its incorporation on 5 November 2025 and list three directors (see Annex 4.4).

Their professional backgrounds bear out the press release's reference to regional experience: one director previously represented the Burundian state on Brarudi's board, while another spent much of a three-decade career in brewing with Heineken, beginning in Rwanda in the 1990s, and has chaired the board of Bank of Kigali since February 2025.⁹⁴

Heineken's statement declares that Synergy Ventures will assume full responsibility for operations, employee welfare and 'tax obligations to the DRC government', while retaining a three-year buyback option. Local sources say the reopened brewery pays taxes to M23, but would not comment on where its revenues end up.⁹⁵ Given the plant's weight in South Kivu's tax base, who ultimately benefits from its revenues under M23 control is a question that merits continued scrutiny.

In April 2026, Heineken announced it had sold its entire stake in Bralima to a second Mauritius-registered company, ELNA Holdings Ltd (Heineken, 2026). Sources inside the company explained that the Bukavu brewery, a third of Congolese output, generated 80% of Bralima's profit margin, carrying the rationale for sustained investment in the other plants across Congo.⁹⁶ In retrospect, the looting of the Bukavu brewery during M23's capture of the city in February 2025 effectively began the process of toppling Heineken in Congo, and with it a major source of government revenues.

CONCLUSION

The case of Heineken in eastern Congo highlights three features of the conflict's political economy that analyses focused on mineral exports tend to miss.

First, Congo matters to its neighbours not only as a source of resources but as a *market* – for goods, for revenues, and for the foreign exchange that dollarised Congolese consumers represent. It is Congolese consumers, whether in urban areas or remote mining hubs, who ultimately pay for government taxes and rebel impositions along the beer distribution chain. Where that burden falls is not evenly spread: it rises as the beer moves from bulk to crate and from the highway to the footpath, so that the consumer furthest from a road – typically at a mining site – pays the most, and pays it to the least formal authority. Moreover, this underlying logic applies across a wide range of consumer goods outside the beer trade, including fuel, rice, cooking oil and soap.

Second, the fiscal significance of beer creates a direct link between market access and cross-border government revenues. When M23 taxes beer imports at Goma or Bukavu, it is not merely extracting rents – it is drawing revenue away from Kinshasa and, through its preferential taxes, channelling it toward Kigali. Such links are, however, not always unilinear, with the long transport routes separating breweries from consumers allowing 'joint extraction regimes' between rebels and governments as beer passes through contested terrain (Suykens, 2010).

Third, beer reveals the ways in which consumer markets have become frontlines in conflict, meriting attention beyond natural resources. It also illustrates how commercial actors navigate, accommodate and sometimes profit from that competition.

CONCLUSION AND POLICY RECOMMENDATIONS

The report's analysis began with a simple observation: across eastern Congo, power is increasingly being exercised over not just territory or production sites, but circulation. Mapping the hundreds of checkpoints and roadblocks present in the region reveals that political economy at today's critical juncture, caught as eastern Congo is in a zero-sum trade war between neighbouring countries. As far as these neighbours are concerned, eastern Congo represents a 'central margin' (Raeymaekers, 2009) – that is, it is central to the profit margins they derive from commodity flows destined for, or originating from, eastern Congo. The structural shift in incentives around holding checkpoints this has created means the current 'roadblock heterarchy' will almost certainly outlast the conflict that produced it. In light of this, a number of conclusions suggest themselves.

Roadblocks facilitate rather than inhibit trade... [they] constitute an 'extractive order' marked by competing, differently organised forms of authority over circulation.

First, the wartime transformation of roadblock geographies in eastern Congo is embedded in what Keen (2005) calls the 'continuation of the economy by other means': a struggle over access to wealth within an evolving regional political economy. Neighbouring countries now mainly derive their rents from controlling the interface between eastern Congo and global markets. As a result, the economies and politics of these neighbours has come to revolve around gatekeeping trade;

ensuring access to eastern Congo's market and resources; and preventing hinterland piracy by their neighbours. Control over supply chains linking Congo to international markets has therefore become a key stake in the region's tensions.

Second, the contemporary checkpoint landscape is marked by a striking pluralisation of authority. Rather than forming a single system of control, eastern Congo's roads are governed by a heterogeneous ensemble of actors – including M23, the Congolese armed forces, civilian state agencies, and various localised militias operating under the umbrella of the wazalendo. Each of these actors deploys roadblocks according to their own political and economic logic. The result is neither simple fragmentation nor a centralised hierarchy, but a landscape in which multiple registers of rule coexist, overlap and compete along the same transport corridors.

Third, different supply chains interact with distinct configurations of authority as they move through this heterarchy. The case studies demonstrate that commodities are not simply objects moving through conflict zones – rather, their material properties and economic features shape how actors will intervene in circulation. The contrasting trajectories of gold, cacao and beer show that the politics of checkpoints cannot be disentangled from the commodity chains that animate them. Here, it is important to acknowledge that such chains are not 'underdeveloped', 'unregulated' or 'primitive', but involve the complex arbitrage of different value registers, fluctuating global prices, protection markets, exchange rates, local measures, conversion rates and taxation modalities.

Nevertheless, all three cases are indicative of a predatory political economy premised on extracting wealth from unprotected and informal labour. Paradoxically, by signalling circulation is possible – subject to the transactional logic of payment for passage – roadblocks facilitate rather than inhibit trade. The payments extracted at roadblocks are then offset against market prices elsewhere. Gold miners face debt, deflated gold prices at remote mining sites, and roadblock-inflated consumption prices. Cacao planters, who are paid a fixed price for their labour instead of sharing in the value of cacao, must navigate insecurity. Beer drinkers have to pay for the preferential customs regimes imposed by M23. Collectively, then, roadblocks constitute an 'extractive order' (Schouten, 2016) marked by competing, differently organised forms of authority over circulation – the aforementioned roadblock heterarchy.

These findings point to a shift in how the conflict economy of eastern Congo should be conceptualised. While armed groups governing territory or exploiting production sites are undoubtedly worthy of attention, this focus should be broadened out to the often violent practices by which movement across space is organised and contested. In this respect, roadblocks represent key institutions via which competing actors structure trade, distribute rents and pursue political projects.

Seen from this perspective, eastern Congo's roads form the connective tissue linking local struggles over land and authority to regional rivalries over markets and revenue. Circulation thus becomes the arena within which local militias, state institutions and neighbouring governments intersect. These exchange networks connect eastern Congo to the Indian Ocean and beyond, and are largely free from the influence of Western regulatory efforts.

A fuller understanding of this landscape is essential for both analysis and policy. If efforts are rigidly centred around mining sites or political dialogue, then much of the incentives linked to capturing value along supply chains, and the power derived from it, will end up being overlooked. Thus, any strategy aimed at stabilising eastern Congo must start with the infrastructure of circulation itself: the roads, checkpoints and cross-border corridors via which commodities move, rents are extracted and authority is asserted.

A number of policy implications arise from a circulation-centred understanding of eastern Congo's conflict economy. In terms of broad recommendations, they can be summarised as follows.

1. REFRAME CONFLICT POLICY SO THAT IT ENCOMPASSES TRADE CORRIDORS AND CONSUMER MARKETS, NOT JUST PRODUCTION SITES

International policy on eastern Congo has for the most part focused on armed interference at the point of extraction in mineral supply chains. Although these remain important, interference often occurs elsewhere, along transport corridors or where commodities reach markets. As such, interventions aimed at stabilising eastern Congo's economy should pay greater attention to how chokepoints for circulation – whether roads, border crossings or checkpoints – are governed. For instance, while corridor monitoring, transport cost transparency initiatives and regional customs cooperation may defuse some of the drivers of cross-border smuggling, they risk exacerbating violent rent extraction elsewhere along commodity

chains. This is not speculative: armed actors have shown they can simply shift to uncertified sites, routes and trading points rather than lose access to revenue (Schouten, 2022) – confirming that corridor-level, not just site-level, governance is where this displacement needs anticipating.

Equally important are eastern Congo's consumer markets. These function as major demand hubs within the regional economy, making them key targets for hinterland piracy in the regional trade war. Failing to acknowledge this in policy means ignoring a key driver of regional competition over eastern Congo's economy.

2. ADDRESS AGRICULTURAL FRONTIER CONFLICTS THROUGH SUPPLY CHAIN GOVERNANCE

The case of cacao illustrates how the expansion of global commodity chains into frontier zones can reshape patterns of violence and land competition. Unlike minerals, cacao is produced across dispersed plantations and transported through complex networks of traders and transporters. Its seasonal harvest cycles and bulk transport make it particularly vulnerable to predation along rural transport routes.

Existing certification schemes for cocoa (or other agricultural commodities) and deforestation tend to focus on plantation-level conditions, rarely taking account of armed taxation along transport corridors. Incorporating these risks into due diligence frameworks could therefore reduce the incentives driving armed groups and military actors to capture rents from these supply chains, with incident monitoring precluding 'polluted' products from entering international supply chains. Towards this end, international buyers and certification initiatives should explore traceability systems that extend beyond farms to include transport conditions. The decade-long experience of mineral certification in the region is instructive here, and cautionary: armed actors that rely on minerals are often able to outwit relatively static traceability efforts (Global Witness, 2022; Matthysen et al., 2021), while certification and documentation requirements disadvantaged smaller, less liquid operators more than they deterred armed actors (Vogel, Musamba and Radley, 2018). Any cacao equivalent should be designed around these known failure modes from the outset, rather than discovering them after the fact.

3. RECOGNISE FISCAL CHOKEPOINTS IN CONSUMER SUPPLY CHAINS

The beer case study highlights another overlooked dimension of conflict economies: the role of consumer goods and fiscal systems. In countries with a narrow tax base,

breweries often provide a major source of indirect taxation through excise duties embedded in retail prices. As such, control over beer distribution links local checkpoint politics directly to state finances and regional trade competition.

This makes breweries and their supply chains potential fiscal pinch-points within the conflict economy. As these breweries often involve majority ownership of firms headquartered in the West, corporate oversight rules there may offer pathways of leverage over local spoilers.

At the same time, this means multinational firms operating in this sector face complex dilemmas. While they may wish to continue contributing to local employment and economic growth as countries spiral into conflict, their investments and distribution networks may inadvertently become embedded in conflict dynamics, as illustrated by the shifts in control over eastern Congo's beer market. Corporate accountability therefore needs to be strengthened not only by industry-driven due diligence and transparency efforts, but more rigorous Western judicial mechanisms concerning the commercial arrangements made in conflict-affected regions. The recent French verdict on financing terrorism charges against cement group Lafarge in relation to its operations in Syria indicates that tolerance for corporate complicity in war crimes is at an all-time low exactly at the moment that Western firms find themselves more beleaguered and politicised across conflict-affected areas (see Gessen, 2026). This pressure needs calibrating carefully, however: the DRC's own history with mineral due diligence shows that heightened legal and reputational risk can trigger blanket over-compliance – buyers avoiding DRC-origin sourcing altogether rather than specifically conflict-linked supply, producing what one study termed a 'de facto embargo' on legitimate Congolese exports (Matthysen and Cuvelier, 2013). Judicial pressure on beer's Western parent firms should be paired with clear channels for continued, accountable investment, to avoid repeating that pattern in the consumer-goods sector.

4. RETHINK STABILISATION THROUGH THE GOVERNANCE OF CIRCULATION

As all of the above implies, stabilisation strategies in eastern Congo should move beyond a narrow focus on territorial control or resource extraction and engage with the governance of circulation – in other words, the heterarchical ensemble of de facto regulatory practices that influence how goods move across contested space, and who earns along the way.

Roads, checkpoints and commodity corridors are all key sites where economic value is captured and political authority is asserted. Here, any shift in the density of flows or balance of power over key arteries must be read against a background of regional competition for access to eastern Congo's market. From this perspective, large infrastructure-cum-trade initiatives such as the EU's Global Gateway, the Couloir Vert initiative and EU support to cross-border infrastructure projects on the Uganda–DRC border⁹⁷ are imbued with several dynamic risks arising from the political logic by which wealth is appropriated and contested. Such risks may be overlooked by assessments that treat these projects purely in terms of investment and growth, since every road that is built or rehabilitated also creates new points at which armed actors can capture value. For instance, in the hypothetical case of an M23 retreat, the wazalendo's encroachment onto the region's main arteries – and the resulting alignment of individual and collective incentives around maintaining checkpoints – represents a structural challenge that will likely shape circulation in eastern Congo for a considerable time.

This has an immediate, practical application. The Expanded Joint Verification Mechanism Plus (EJVM+), which began field verification under the Doha Framework in August 2026 (US Department of State, 2026), currently operates on a trigger-based model that investigates only when alerted and with the consent of the parties involved – a design a parallel study of the peace process has already flagged as poorly suited to strategic mining areas and trade routes, since the actors benefiting from control over them have little incentive to report violations (Gaston et al., 2026). The roadblock geography mapped in this report offers a ready-made input for closing that gap: EJVM+ and the wider ceasefire monitoring architecture should build known checkpoint locations and armed-actor presence along key corridors directly into their tripwires, rather than relying on the parties themselves to self-report contested control over them.

5. REDIRECT WESTERN LEVERAGE FROM THE COMMODITY CHAIN TO REGIONAL FISCAL GOVERNANCE

Gold laundering through Gulf and East Asian financial centres remains central to eastern Congo's conflict economy, and the West has not stood idle: between March 2025 and July 2026, the EU, US and UN Security Council each sanctioned Rwandan and DRC-linked entities in the gold trade – a refinery, mining officials, an armed group, and, most recently, senior AFC/M23 figures (Council of the European Union, 2025; US Department of State, 2025; UN Security Council 1533 Committee, 2026) – yet each round has been followed by another rather than by any interruption to the

trade. Rwanda, as this report's opening chapter notes, has used deepened Congolese trade to offset exactly the fiscal and diplomatic costs such sanctions impose, while gold and ownership structures continue re-routing through the UAE and Hong Kong. Repeated enforcement is entrenching this shift, not reversing it.

The upshot: sanctions no longer translate reliably into leverage over the volumes, revenues and rents actually sustaining armed actors and their neighbouring patrons, and each round risks accelerating the shift into circuits where Western oversight has no purchase to begin with. Durable leverage, if it exists, now sits a level up – in the technocratic relationships financing public revenue systems in the DRC and its neighbors alike. The December 2025 Regional Economic Integration Framework (REIF) between the DRC, Rwanda and the US already commits to harmonizing tax and regulatory regimes and customs cooperation (Democratic Republic of the Congo and Republic of Rwanda, 2025, Statement of Tenets, sec. II.C), though these commitments remain, as one assessment notes, “non-binding” (Gaston et al., 2026). The DRC's IMF program already prioritizes domestic revenue mobilization; Rwanda's non-disbursing Policy Coordination Instrument functions as precisely the certification of donor credibility its Congolese trade has been compensating for; and Uganda's active IMF and World Bank engagement already discusses revenue measures alongside its own large gold-refining sector. The recommendation is to use these existing engagements as the delivery mechanism for the REIF's harmonization commitments, rather than treating sanctions as the primary lever.

This is not a silver bullet: the recurring lesson from sanctions, the Regional Certification Mechanism and the DRC–Rwanda political architecture alike is that political will, not institutional design, is the binding constraint (Gaston et al., 2026). But IMF and World Bank reviews are certified by the institutions themselves, not enforced by host governments against their own commercial interests – a structurally different form of leverage worth testing alongside, not instead of, the tools above.

NOTES

- 1 For the purposes of this report, the term ‘armed actors’ encompasses official Congolese security services (army, police), foreign armed forces and armed groups.
- 2 The term ‘gatekeeping strategy’ was coined by Cooper (2019) to denote the strategies employed by a variety of actors looking to derive political or economic benefits from controlling the interface between domestic and international exchanges.
- 3 This builds on Carayannis et al.’s (2018) insight that public authority in Congo is structured according to competing networks of power (see also Korf et al., 2018).
- 4 Participatory cartography folds descriptive spatial analysis and ethnography into one, relying on drawing and ‘spatial storytelling’ to communicate journeys, routes and roadblocks encountered along the way (see Harris, 2016). In discrete settings, we asked road users to describe and draw habitual routes on large sheets of paper, indicating roadblocks and typical or unusual occurrences.
- 5 For instance, crawling local news sites and the social media profiles of local civil society and conflict observers, as well as situation reports forwarded by local contacts.
- 6 While other minerals – principally cassiterite (tin) and coltan – sourced from the DRC are also important (for Rwanda especially), they are excluded from this analysis for the sake of analytical clarity. For a sense of the scale of informal trade between Congo and its eastern neighbours, see Mungai (2023).
- 7 Confidential diplomatic source, Kampala.
- 8 The US Treasury sanctioned the RDF for this in March 2026: <https://home.treasury.gov/news/press-releases/sb0411>.
- 9 Term coined in Taaffe, Morrill and Gould (1963).
- 10 The remaining 15 roadblocks sit just across provincial boundaries in adjacent provinces.
- 11 For these and the following 2017 figures, see Schouten, Murairi and Kubuya (2017). Note that comparison data for 2017 only covers North and South Kivu provinces, while the current survey also encompasses Ituri.
- 12 This trend was already evident in 2024 (see Murairi et al, 2024).
- 13 99 out of 418 armed group roadblocks and 99 out of the total 694.
- 14 M23 emerged out of the National Congress for the Defence of the People, or CNDP, which was itself a reinvention of RCD-Goma. The CNDP was estimated to have generated US\$250,000 per month in taxes, mainly from checkpoints and border posts (see UN Group of Experts on the DRC, 2009, para. 36).
- 15 Like the CNDP, M23 made around US\$200,000 monthly in taxes, mainly on trade (see UN Group of Experts on the DRC, 2012: annex 46, para. 5; UN Group of Experts on the DRC, 2013: para. 47).
- 16 AFC Congo, post on X, 13 November 2025, <https://x.com/afcongo/status/1989066726080692569>.
- 17 Focus groups and interviews, October 2025 and February 2026.
- 18 Motorcycle drivers raised prices per kilo from FC 3,000 to FC 5,000 as the price of roadblocks from Goma–Walikale reached FC 200,000 (see Congo Quotidien, 2025, 2026).
- 19 Telephone interview, December 2025.
- 20 Source: Interviews, local transporters, January 2026.

- 21 ACCO section Walikale, letter No. 001/ACCO/W/2025.
- 22 Source: interviews with large gold traders, Bunia, January 2026.
- 23 <https://aruactualite.com/ituri-chaque-barriere-est-un-prelevement-le-cri-dalarme-du-journaliste-parquet-madhira-job-face-aux-contrôles-a-repetition/>.
- 24 As recently as 15 years ago, only relatively few Congolese armed groups existed. Since then, they have fragmented into a patchwork of over 200 localised factions, reflecting what one recent analysis describes as a process of 'involution'. This describes a situation in which conflict generates its own centrifugal momentum due to a growing number of actors seeking material or political benefits from continued insecurity (see Congo Research Group and Ebuteli, 2025).
- 25 Interview, South Kivu, September 2025.
- 26 Many militia roadblock operators refuse to identify themselves beyond claiming to be 'wazalendo'. As such, no specific group could be identified for 40 of the wazalendo-operated roadblocks. Some groups use this as cover: according to local sources, the FDLR have mixed in with other wazalendo factions to avoid pursuit by M23 or the Congolese armed forces. There are also groups that reject the 'wazalendo' label entirely, preferring 'Mai-Mai' or 'self-defence groups'.
- 27 For the latest mapping of armed groups, see Kivu Security Tracker (2021) (see also Hoffmann, 2019).
- 28 Interviews in Kalehe, November 2025, and Komanda, February 2026.
- 29 This section is based on interviews with customary authorities, military commanders and faction leaders, Kalehe, September-October 2025.
- 30 Interview, Katendere, Walikale, September 2025.
- 31 Interviews with miners operating in Mabanga, August 2025.
- 32 Interviews with local miners, militias and customary authorities, Lubero, October 2025.
- 33 Interviews with miners, pit owners and traders, Bunia, January 2026.
- 34 Interview, Iga Barrière, September 2025.
- 35 Focus group with transporters, Bukavu, October 2025.
- 36 Interview, Kashugo, September 2025.
- 37 Interview, Komanda, January 2026.
- 38 Interviews, gold traders, Iga Barrière. October 2025.
- 39 Interviews and focus groups, Bunia, November 2025 and January 2026.
- 40 Interviews with mining pit bosses in areas under these militias' control, September 2025.
- 41 Interviews, Bunia (January 2026) and Bujumbura (May 2026).
- 42 Official export declarations for 2024–2025 obtained via Export Genius.
- 43 Interview, Entebbe, January 2026.
- 44 Interview, Bujumbura, May 2026.
- 45 Focus group in Komanda, January 2026.
- 46 Interview, December 2025.
- 47 Focus group, Komanda, January 2026.
- 48 Interviews with customary authorities and cacao farmers, Komanda and Bunia, January 2026.
- 49 Interview, Komanda, January 2026.

- 50 Interviews with experienced cacao entrepreneurs, Bunia, January 2026.
- 51 In ACLED data from 2020–2026 across Beni, Irumu and Mambasa, violent incidents involving the ADF occur at a median distance of 6.6 kilometres from the edge of the cleared frontier, against 8.7 kilometres for incidents attributed to any other actor; 42% of ADF incidents fall within five kilometres of it, against 34%. The contrast is sharpest where the frontier is still advancing – in Irumu the median is 7 kilometres for the ADF against 21 for all others – and it disappears in Beni, where conversion is far enough advanced that all violence is frontier violence, whoever commits it. See Annex 1 for discussion.
- 52 Focus groups and interviews, Bunia, January 2026.
- 53 Interview, Komanda, January 2026.
- 54 Interview, Komanda, January 2026.
- 55 Interview with the Provincial Director of the National Office for Agricultural Products of the Congo (ONAPAC), Bunia, January 2026.
- 56 Interview, Komanda, January 2026.
- 57 Interviews and focus groups with representatives of these militias, Bapere sector (November 2025) and Walese Vokutu (January 2026).
- 58 Interviews with cacao farmers, November 2025 and January 2026.
- 59 Interview, January 2026.
- 60 Interviews, Komanda, January 2026.
- 61 Interviews in Mungamba, January 2026, see Ituri.cd, 2025”.
- 62 Focus group, Komanda, January 2026.
- 63 Interview, Komanda, January 2026.
- 64 Focus group, Komanda, January 2026.
- 65 See Annex 3 for discussion.
- 66 Interviews, militia representatives, Komanda, January 2026.
- 67 Interview with cacao trader, Bundibugyo, Uganda, October 2025.
- 68 Interviews, Kasindi border checkpoint operators, September 2025.
- 69 Interviews, Butembo, September 2025.
- 70 Interviews, Kasindi border checkpoint operators, September 2025.
- 71 Interviews at border crossing, September 2025.
- 72 Interviews, Ugandan cacao traders, Mpondwe, September 2025.
- 73 Interview, Boga, September 2025.
- 74 Interview with cocoa trader, Bundibugyo, Uganda, October 2025.
- 75 Interviews, Bundibugyo, September 2025.
- 76 Interview, Brarudi, May 2026, see Nkurunziza, 2024. The 45% and 25% are the company's own figures.
- 77 UN Comtrade data, accessed via World Bank WITS platform: <https://wits.worldbank.org/trade/comtrade/en/country/BDI/year/2023/tradeflow/Exports/partner/ALL/product/220300> (Burundi); <https://wits.worldbank.org/trade/comtrade/en/country/RWA/year/2019/tradeflow/Exports/partner/ALL/product/220300> and <https://wits.worldbank.org/trade/comtrade/en/country/RWA/year/2022/tradeflow/Exports/partner/ALL/product/220300> (Rwanda, 2019 vs. 2022) (accessed 22 May 2026).

- 78 Congo faces a similar challenge at its Angolan border, where smugglers sell Angolan Heineken products at below market prices in order to obtain dollars (see Economist, 2018).
- 79 In November 2024, the DRC and Burundi negotiated a bilateral exemption for Burundian beer, reflecting their alignment in the fight against Rwanda-backed M23 (see Tsieleka, 2024).
- 80 Interview, Bukavu, October 2025.
- 81 Telephone interviews with beer traders, December 2025 and February 2026. They add that soft drinks are taxed at US\$1 per case, while Tanzanian beer is taxed at the same rate as Rwandan beer.
- 82 The rate was previously higher, but was lowered following pleading by traders. Telephone interview, December 2025.
- 83 Interview with a beer importer, Goma, November 2025.
- 84 Interview with a beer importer Bukavu, December 2025.
- 85 Goma border crossing: 2,000 cases per week × 48 weeks = 96,000 cases per year × US\$2.50 = US\$240,000. Bukavu: 10,800 cases per week × 48 weeks = 518,400 cases per year × US\$2.50 = US\$1,296,000. These calculations are likely conservative, given Rwanda's official beverage export figures for the same period.
- 86 Rwandan beer sales in Congo also fatten the excise accounts of the Rwandan government, which recently announced a suite of domestic consumption tax increases designed to offset Western economic sanctions. The so-called Funga Mkanda ('tighten the belt') policy includes a 5% increase in levies on beer and soft drinks (bringing the total rate of value captured from beer consumption to 65%) (Muhire, 2025).
- 87 Interview, beer trader, Goma, February 2026.
- 88 Interviews, wazalendo representatives, Kalehe, September 2025.
- 89 Interviews, Kalehe, September 2025.
- 90 Interview, Bukavu, December 2025.
- 91 Interview, community elder, Usala groupement, North Kivu, November 2025.
- 92 Simaro Ngongo Mba, post on X, 10 January 2026, <https://x.com/SimaroNgongoMba/status/2009864932917957092>.
- 93 Phone interview, Bukavu, March 2026.
- 94 Aloys Ntakirutimana (spelled Ntakarutimana in much Burundian reporting) represented the Burundian state on Brarudi's board until Presidential Decree No. 100/44 of 10 October 2015 named his replacement. According to local media, he was arrested on 24 March 2026 (SOS Médias Burundi, 2026). On Eugène Ubalijoro's career with Heineken and Molson Coors and his appointment as chair of Bank of Kigali, see KT Press (2025a).
- 95 Interviews, beer traders and individuals close to the M23 administration in Bukavu, March 2026.
- 96 The other plants, by contrast, suffered at the hands of competition from other brands and imports from neighbouring countries. Interviews, Bujumbura and confidential source, May 2026.
- 97 On the Global Gateway in the DRC, see European Commission, International Partnerships: Democratic Republic of the Congo, https://international-partnerships.ec.europa.eu/countries/democratic-republic-congo_en. On the Couloir Vert, see <https://kivukinshasagreenecorridor.org>, see <https://drcongo.iom.int/en/news/drc-and-uganda-launch-eu25million-eu-funded-projects-boost-cross-border-cooperation-stabilisation-resilience-and-trade-border-areas>.
- 98 See www.escokivu.com/partner-with-us. Interview, Rainbow Alliance, March 2026.

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ANNEXES

ANNEX 1. REMOTE-SENSING AND CONFLICT-EVENT METHODS

Land-cover change: data and epoch definitions

Forest loss and the deforestation and agricultural-conversion frontier are derived from two remote-sensing products. The long-run backbone is the Joint Research Centre's Tropical Moist Forest (TMF) dataset (Vancutsem et al., 2021; Earth Engine collection projects/JRC/TMF/v1_2023, covering 1990–2023), using its annual deforestation-year and transition layers. Recent-year loss is extended and cross-checked against the Hansen/UMD Global Forest Change product (Hansen et al., 2013; UMD/hansen/global_forest_change_2023_v1_11). Baseline forest is taken from the TMF undisturbed and degraded-forest classes.

Each cleared pixel is assigned to one of four epochs by its recorded year of loss – up to 2000, 2001–2010, 2011–2020 and 2021–2023 – with pixels carrying no recorded loss held as background. The final epoch closes in 2023 because both source products terminate there. Because year values are categorical, all pyramiding and reprojection was forced to nearest-neighbour resampling: numerically averaging class values across pixels would produce epochs that do not exist. The analysis window covers the cacao belt of Beni and Lubero territories in North Kivu and Irumu and Mambasa in Ituri.

Both products map forest clearing and conversion in general. They are used here as a proxy for the cacao-conversion frontier, not as a crop-specific classification: the Forest Data Partnership's cacao-probability model has no coverage over eastern DRC, so no crop-level attribution is possible. Clearing shown on the maps should therefore be read as conversion consistent with the cacao frontier – corroborated by the interview record and by spatial coincidence with known planting areas – rather than as mapped cacao. The cacao belt drawn on the routes figure is a single generalised polygon derived from the same clearing footprint, smoothed to one shape with no epoch distinction, and is indicative of extent only.

Conflict event data

Violence data are from the Armed Conflict Location & Event Data Project (ACLED), export of 12 March 2026, covering the territories of Beni, Lubero, Irumu and Mambasa from January 2020. Three uses are made of it.

Seasonality. The seasonality analysis covers 74 whole months, January 2020 to February 2026. Events were classed as cacao-linked where the ACLED notes field contains 'cacao' or 'cocoa' (case-insensitive), yielding 33 events, each verified individually as a genuine cacao-related incident; perpetrators span the ADF, unidentified armed groups, local militias and one joint FARDC-UPDF event. Monthly rates are normalised by months observed. The aggregate null result is robust to actor and event-type cuts: the ratio of the November–January monthly rate to the rest-of-year rate is 0.93 for ADF-only events, 0.88 for violence against civilians, 0.76 for looting, 0.97 for abductions, 0.76 for unidentified armed groups and 1.02 for riots and protests. The cacao-linked subset runs at 2.35 times the rest-of-year rate.

The ADF attack layer. The attack layer plots events in which the ADF appears in any ACLED actor field – as first or second actor, or as an associated actor – restricted to the three violent event types (violence against civilians, battles, explosions and remote violence) and to records with a geographic precision of 1 or 2, which excludes events located only to a district centroid. Each event is drawn as a ring scaled by recorded fatalities, over a kernel-density surface summarising where attacks cluster. Fatality counts are ACLED's own and are conservative.

Proximity of ADF violence to the conversion frontier. Taking the distance from each violent event to the edge of the mapped conversion belt, across the three cacao territories:

	Events	Median distance to frontier	Within 5 km
ADF-involved	2,960	6.6 km	41.8%
All other actors	1,645	8.7 km	33.8%

The difference is significant (Mann-Whitney $p < 0.001$), and it is concentrated where the frontier is still advancing. In Irumu the ADF median is 7.2 km against 21.1 km for other actors, with 37% of ADF events within 5 km against 15%; the pattern holds in Mambasa (4.7 against 6.6 km) and Lubero (9.6 against 14.3). In Beni the two are indistinguishable (6.26 against 6.23 km, $p = 0.999$), where conversion is far enough advanced that effectively all violence is frontier violence.

Three caveats. The frontier layer is the generalised conversion belt described above, not a surveyed plantation boundary. Perpetrator attribution follows ACLED's actor coding, which is itself uncertain for the ADF given the documented practice of other groups operating in its name. And this is a spatial association, not evidence of causation in either direction.

ANNEX 2. ARMED GROUPS RECORDED AT ROADBLOCKS

Although the term *wazalendo* suggests unity, in popular usage it has become a catch-all for Congolese armed groups, most of which long predate the label, are driven by highly localised agendas, and have been consistently manipulated by politicians from their home areas. Where fifteen years ago only a handful of groups existed, they have progressively fragmented into a patchwork of more than two hundred localised factions (Kivu Security Tracker, 2021) – a process one recent analysis describes as involution (Stearns, 2022), in which conflict generates its own centrifugal momentum as a growing number of actors seek material or political benefit from continued insecurity.

Most are tied to a specific ethnic community whose young men initially mobilised against an external threat: the Raia Mutomboki to the Rega and Tembo of South Kivu, the Mai Mai Kifuafua to the Tembo of southern Walikale, the APCLS to the Hunde of North Kivu, the Nyatura to North Kivu's Congolese Hutu population, the NDC-R to the Nyanga of northern Walikale. After that initial mobilisation most persisted, moving into local governance and economic predation.

The survey recorded a named group at the barrier for 41 distinct groups across 318 group-barrier records. Thirty-three barriers are held jointly by two or more named groups, so the totals below sum to more than the number of barriers involved. Counts are all occurrences: a faction's barriers count towards its parent group.

Raia Mutomboki factions: Hamakombo 26, Mungoro 13, Butabichera 11, Mwenye Asili 7, Bibilo 3, APDC (Alliance des Patriotes pour la Defense du Congo) 2, Kalumande 1, Enamatanga 1, faction unrecorded 5.

A further 20 groups account for 40 group-barrier records: Mai Mai MJRL, Mouvement des Jeunes Résistants pour la Libération (MJRL-RDC) (3) · Sengi (3) · Vandame (3) · UDECO, Unité de la Défense du Congo (3) · Zairois (3) · Ngendo (3) · MCRP, Mouvement des Résistants Patriotes Congolais (3) · Mai Mai Yakutumba (3) · CPLC/FABB (Biloze Bishambuke), Forces Armées Biloze Bishambuke (2) · APCLS, Alliance des Patriotes pour un Congo Libre et Souverain (2) · UPDCO (2) · JPCDC (2) · RAD, Réserve Armée de la Défense (1) · Boika (1) · général autoproclamé Tango Fort (1) · Poutine (1) · FAR-W (1) · FDLR, Forces Démocratiques de Libération du Rwanda (1) · MAIC/Chini ya Tuna (1).

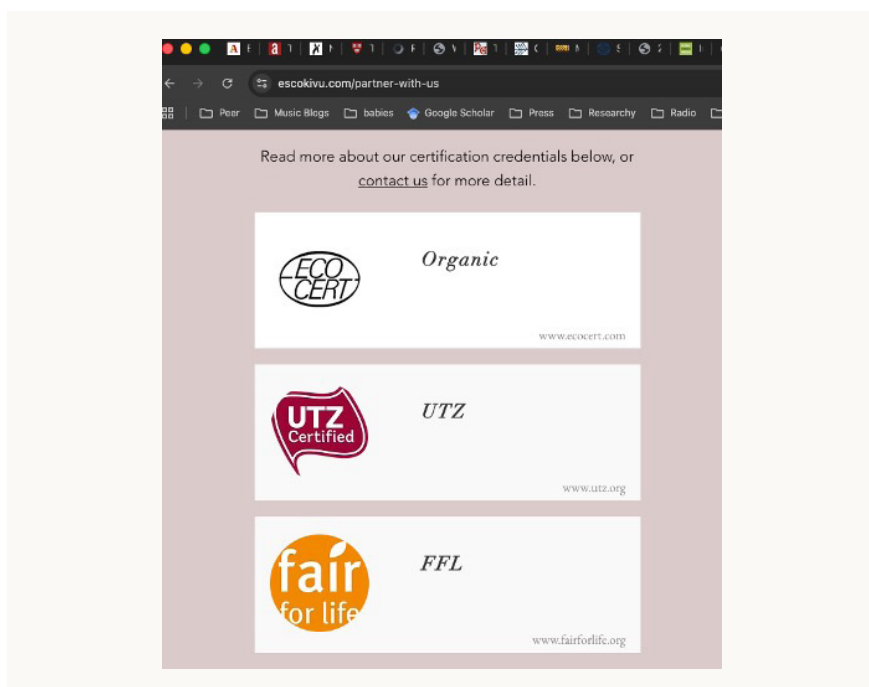
GROUP	Full name	Barriers	Joint	National road	Territories	Community
	Rénové				Walikale	
Raia Mutomboki	(umbrella)	69	2	47	Kabare, Kalehe, Walikale	Rega / Tembo
NDC-R	Nduma Défense du Congo-Rénové	37	11	1	Lubero, Walikale	Nyanga
FRPI	Force de Résistance Patriotique de l'Ituri	24			Irumu	Lendu
FPP/AP	Front Patriotique pour le Peuple / Armée du Peuple	18	2	1	Irumu, Lubero, Walikale	Nande
Nyatura	(catch-all for Congolese Hutu armed groups)	15	9		Kalehe, Masisi, Rutshuru	Hutu
of which MCDPIN	Mouvement Congolais pour la Defense du Peuple et de l'Integrite Nationale	10	3		Kalehe	Hutu
of which CMC/FDP	Collectif des Mouvements pour le Changement - Forces de Defense du Peuple	4	4		Masisi, Rutshuru	Hutu
Mai Mai Kifuafua	-	14		14	Kalehe, Walikale	Tembo
Mai Mai Uhuru	-	13	11	1	Walikale	-
CODECO	Coopérative pour le Développement du Congo	11		7	Djugu, Mahagi	Lendu
Sanduku (Serpent)	-	8	1		Kalehe	-
FPIC/Chini ya Kilima	Force Patriotique et Intégrationniste du Congo	8		5	Irumu, Mambasa	Bira
FPC/Shikito	-	8	1	3	Mwenga	Rega
FDS	Forces Divines Simba	6		6	Lubutu	-
PAPCO	Parti des Artisans de la Paix au Congo	6	1	3	Mwenga	-
UPLC	Union des Patriotes pour la Libération du Congo	6	1	2	Kabare, Lubero	Nande
auto-défenses Bapiri	-	6			Walikale	Piri
COPACO	Corps de Patriotes Congolais	5	3		Kalehe, Masisi	Tembo
Mamadou	-	4	1		Lubero, Walikale	Nande
Vumbi	-	4	4	1	Mwenga	-
Ndugu	-	4	1	2	Kalehe, Mwenga	-
Kanyangara	-	4			Kalehe	-

ANNEX 3. THE EXAMPLE OF ESCO

Multiple interlocutors in North Kivu and Ituri referred to the singular role played by cacao buyer ESCO Kivu. The company, started in 1956 as Edm Schluter Co Ltd in Uganda, entered Zaire in the 1970s as a coffee trader. After wilt disease destroyed local coffee, the company shifted to cacao in the 2000s, during the heyday of the Second Congo War. ESCO Kivu is reportedly the biggest exporter of cacao from Congo, while its sister company ESCO Uganda ranks among the top three cacao exporters in Uganda.

Today, the firm pre-finances farmers and operates buying depots across North Kivu and Ituri, including in some of the areas frequently affected by ADF and militia activities. Some have observed that, while other cacao traders are regularly harassed or pillaged, ESCO's depots and transporters appear impervious to the generalised insecurity (Tsieleka, 2021).

Figure 37. Screenshots from ESCO's homepage showing claimed certification



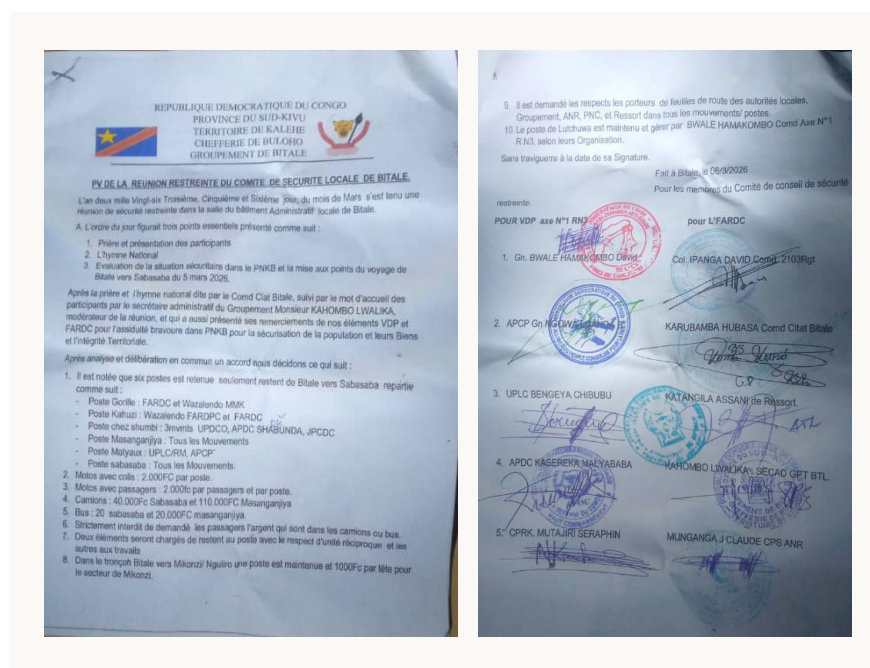
Source: ESCO Kivu website.

ESCO Kivu is hailed by the European Union as a model for responsible local sourcing for cacao producers wishing to enter the European market (CBI, 2025). While ESCO Kivu's webpage indicates EcoCert, Fair for Life and UTZ membership (see Figure 37), the databases of the former two international certification mechanisms did not return ESCO Kivu as a certified member, and the Rainforest Alliance, which absorbed UTZ, confirmed it does not licence in DRC.⁹⁸

ANNEX 4. OTHER CITED DOCUMENTS

ANNEX 4.1 DOCUMENT BY THE LOCAL SECURITY COMMITTEE STIPULATING THE DIVISION OF ROADBLOCKS AND TAX LEVELS BETWEEN DIFFERENT WAZALENDO GROUPS AND THE ARMY IN KALEHE

Figure 38. Procès-Verbal from the Bitale Security Committee stipulating the division of roadblocks between armed actors, as well as the levies agreed upon (March 2026)



Sources: Photos by research team (2025). Note: The document fixes a six-post tariff schedule along the Bitale-Sabasaba axis and is co-signed by FARDC officers, the ANR post chief and the Groupement's administrative secretary alongside five Wazalendo/VDP commanders, each affixing their own stamp. Taxation of the road here is a jointly authored fiscal order that state and non-state signatories ratify for one another.

English translation:

MINUTES OF THE RESTRICTED MEETING OF THE LOCAL SECURITY COMMITTEE OF BITALE

In the year two thousand twenty-six, on the third, fifth and sixth day of the month of March, a restricted security meeting was held in the hall of the local Administrative building of Bitale.

A. The agenda comprised three essential points, presented as follows:

1. Prayer and introduction of participants
2. The National Anthem
3. Assessment of the security situation in the PNKB [Kahuzi-Biega National Park] and finalisation of arrangements for the journey from Bitale to Sabasaba of 5 March 2026.

After the prayer and the national anthem, led by the Chief of Police, followed by the welcome address to participants by the administrative secretary of the Groupement, Mr KAHOMBO LWALIKA, moderator of the meeting, who also extended his thanks to our VDP and FARDC elements for their diligence and bravery in the PNKB in securing the population and their property and territorial integrity.

After joint analysis and deliberation, by common accord we decide the following:

1. It is noted that only six posts are retained, remaining from Bitale towards Sabasaba, distributed as follows:
 - Gorille Post: FARDC and Wazalendo MMK
 - Kahuzi Post: Wazalendo FARDPC (?) and FARDC
 - Chez Shumbi Post: 3 movements – UPDCQ, APDC SHABUNDA, JPCDC
 - Masanganjiya Post: All the Movements
 - Malyaux Post: UPLC/RM, APCP
 - Sabasaba Post: All the Movements.
2. Motorcycles carrying goods: 2,000 FC per post.
3. Motorcycles carrying passengers: 2,000 FC per passenger and per post.
4. Trucks: 40,000 FC at Sabasaba and 110,000 FC at Masanganjiya.
5. Buses: 20[,000] FC at Sabasaba and 20,000 FC at Masanganjiya.
6. It is strictly forbidden to demand money from passengers who are inside trucks or buses.
7. Two elements shall be assigned to remain at the post, with respect for reciprocal unity, and the others to the works [i.e. other duties].
8. On the Bitale–Mikonzi/Nguliro stretch, one post is maintained, at 1,000 FC per head, for the Mikonzi sector.

9. Respect is required for holders of travel permits (feuilles de route) issued by the local authorities, the Groupement, the ANR, the PNC, and the Ressort, at all movements/posts.
10. The Lutchuwa post is maintained and managed by BWALE HAMAKOMBO, Commander of Axis No. 1, RN3, according to their own organisation.

Done at Bitale, 06/3/2026

For the members of the restricted Security Council Committee.

FOR VDP Axis No. 1 RN3

For the FARDC

- | | |
|-------------------------------|---|
| 1. Gen. BWALE HAMAKOMBO David | Col. IPANGA DAVID, Comd. 2103rd Regt |
| 2. APCP Gen. NGOWA LOANDA B | KARUBAMBA HUBASA, Comd. Citat Bitale |
| 3. UPLC BENGAYA CHIBUBU | KATANGILA ASSANI, de Ressort |
| 4. APDC KASEREKA MALYABABA | KAHOMBO LWALIKA, SECAD GPT BTL
[Administrative Secretary, Bitale Groupement] |
| 5. CPRK MUTAJIRI SERAPHIN | MUNGANGA J. CLAUDE, CPS ANR |

ANNEX 4.2 HEINEKEN'S RESPONSE TO QUESTIONS FROM THE RESEARCH TEAM

Dated Jan, 22, 2026

"Dear Peer,

Thank you for your query, below you can find our response:

HEINEKEN suspended operations in Eastern DRC in February 2025 after the Bukavu brewery was looted by the local civilian population. Loss of operational control was formally declared in June 2025 following the takeover of our facilities by armed personnel in Bukavu, Goma and surrounding areas. Throughout this period our priority remained the safety and livelihoods of our employees, safeguarding essential community services, preventing misuse of the facilities in a volatile security context and fulfilling all tax obligations to the government of the DRC. HEINEKEN does not control the final destination of third party export flows as products tend to be traded with many intermediates.

Our updated position on the Eastern DRC is available on our website.

Best regards,

Heineken Press Office"

ANNEX 4.3 FPP/AP WAZALENDO LEVY IMPOSED ON BEER

Figure 39. Wazalendo group FPP/AP decree stipulating beer taxes at its roadblocks (June 2024)



Source: Photo by research team (2025).

English translation:

Circular note No. 003/Br.Fin/2024, Front Patriotique pour la Paix–Armée du Peuple (FPP/AP), Bureau of Finance, issued at Mbughavinywa, 7 June 2024.

DEMOCRATIC REPUBLIC OF CONGO
PATRIOTIC FRONT FOR PEACE
PEOPLE'S ARMY
(FPP/AP) in abbreviation
BUREAU OF FINANCE

CIRCULAR NOTE No. 003/Br.Fin/2024

To the attention of all distributors and resellers of BRASIMBA and BRALIMA products.

As of this Monday 10 June 2024, all BRASIBA [sic] and BRALIMA products in the zone under our control shall be taxed as set out in the table below.

TARIFF TABLE

No.	Designation	Amount	Observation
01	Crate of 65 cl	3,500 FC	
02	Crate of 50 cl	5,000 FC	
03	Crate of 33 cl	5,000 FC	
04	Crate of soft drinks	5,000 FC	

Done at Mbughavinywa, this 07 June 2024

**ANNEX 4.4 MAURITIAN REGISTRAR OF COMPANIES RECORD FOR
SYNERGY VENTURES**

Figure 40. Mauritius Registry of Companies entry for ‘Synergy Ventures Holding Ltd.’ (accessed August 2026)

Registrar of Companies

Date Issued: 09/08/2026

Company Details	
File No.: C228116	Date Incorporated: 05/11/2025
Name: Synergy Ventures Holdings Ltd	Nature: Private
Type: LIMITED BY SHARES	Status: Live
Category: AUTHORISED COMPANY	null
	Sub Category:
Registered Office Address: 35 Cybercity Level 3, Alexander House Ebene 72201 MAURITIUS	
Effective Date for Registered Office 27/10/2025	

Office Bearers			
Position	Name	Service Address	Appointed Date
DIRECTOR	KALISA JEAN PAUL	35 Cybercity Level 3, Alexander House Ebene MAURITIUS	05/11/2025
DIRECTOR	NTAKIRUTIMANA ALOYS	Level 3 Alexander House 35 Cybercity Ebene MAURITIUS	05/11/2025
DIRECTOR	UBALIJORO EUGENE	35 Cybercity Level 3, Alexander House Ebene MAURITIUS	05/11/2025
REGISTERED AGENT	INTERCONTINENTAL TRUST LIMITED	LEVEL 3, ALEXANDER HOUSE 35 CYBERCITY EBENE MAURITIUS	05/11/2025

Source: Mauritius Registry of Companies.

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