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CONFLICT WATCHLIST 2026 REPORT

Economic warfare escalates as militants expand beyond the Sahel

Previously distinct conflicts in the Sahel and coastal West Africa are merging into a single, interconnected one that will likely become a key arena of militant competition.

11 December 2025 • 7-minute read

Also available in [French](#)



An aerial view of Bamako, Mali's capital, that's been hard-hit by a fuel and transport blockade. Photo by John Images via Getty Images.

AUTHOR



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By the numbers

From 1 January to 28 November 2025:

- Political violence resulted in the deaths of **over 10,000** people in Burkina Faso, Mali, and Niger.
- Militants kidnapped **30** foreign nationals in Mali (22) and Niger (8).
- ACLED records **nearly 70%** more fatalities in Benin compared to the first 11 months of 2024.

In 2025, jihadist militant groups escalated their campaigns in the central Sahel, threatening the stability and security of military-led regimes in the region. [Jama'at Nusrat al-Islam wal-Muslimin \(JNIM\)](#) and the [Islamic State Sahel Province \(ISSP\)](#) consolidated their influence across much of Mali, Burkina Faso, and Niger, while extending operations into the Benin, Niger, and Nigeria borderlands.

As a deliberate strategy employed by militant groups to disrupt economic functions and pressure states in the region, economic warfare became a defining feature. In Mali, JNIM imposed a sweeping [fuel and transport embargo](#) on the cities of Kayes and Nioro du Sahel as part of coordinated offensives spanning Kayes, Sikasso, Koulikoro, Segou, and Mopti. The blockade disrupted trade and transport routes linking Bamako and the surrounding regions, resulting in fuel shortages and nationwide price hikes. It was part of a deliberate effort to paralyze the economy, undermine government authority, and destabilize the military regime. As a result of JNIM's operations and counter-offensives by the military, violence in [Kayes, Sikasso, and Segou](#) surged to the highest monthly levels since ACLED began recording data in 1997.

In Burkina Faso, JNIM sustained its offensives against the military and the [Volunteers for the Defense of the Homeland \(VDP\)](#). In May, the group briefly seized the provincial capitals of [Djibo and Diapaga](#) in rapid succession, demonstrating a step change in its military capacity. In September, the group launched a devastating ambush on a military convoy near Koubel-Alpha in Soum province, killing about 90 soldiers in one of the deadliest attacks on the country's military forces to date. The offensives in both Mali and Burkina Faso further demonstrate JNIM's growing military capabilities and its clear intent to destabilize these military regimes by undermining state authority and territorial control and disrupting economies and key transit routes.

Niger has not experienced the same scale of violence as its neighbors, but it is becoming increasingly vulnerable to militant activities. Militancy has spread well beyond traditional hotspots into the southern Dosso and northern Agadez regions. Similar to JNIM, ISSP has carried out its own form of economic warfare and intensified its attacks on the [Benin-Niger oil pipeline](#) in the Dosso and Tahoua regions along the border with Nigeria. The kidnapping of a United States citizen in Niamey on 21 October illustrates the country's growing fragility and further demonstrates that militant reach now extends into [urban centers](#) once considered secure and less affected by militancy.

Both JNIM and ISSP launched kidnapping campaigns targeting foreigners, which drove record-high instances of kidnapping in Mali and Niger (*see graph below*).¹ JNIM primarily targeted foreign workers as part of its economic warfare strategy. It focused on industrial production facilities, mining sites, and transit routes. ISSP adopted a different approach by targeting both Western nationals and foreign laborers. Most abductions occurred in Niger. ACLED records additional incidents in the nearby border areas of Burkina Faso and Algeria. The [ISSP-sponsored operations](#) mark a shift toward taking high-value Western nationals hostage and outsourcing abductions to criminal networks.

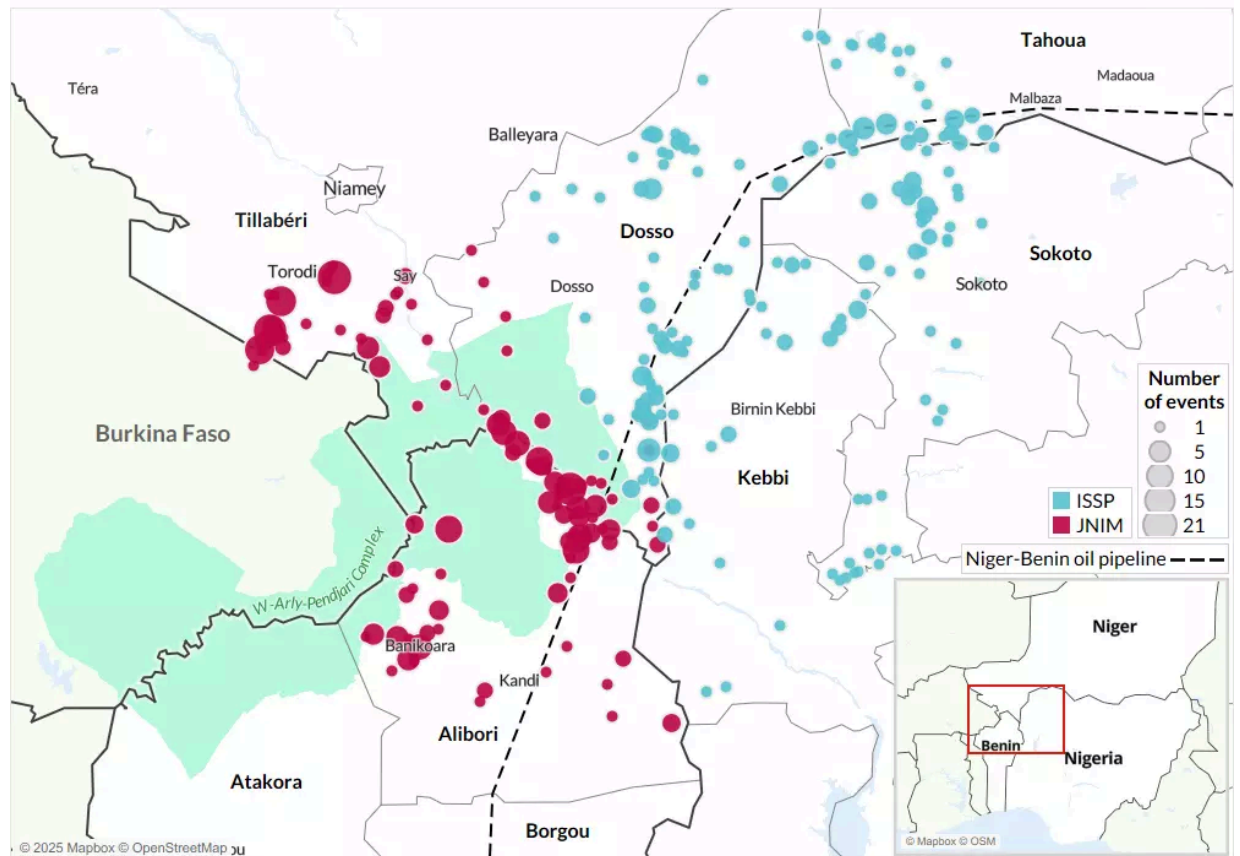
Spreading conflict into coastal West Africa will challenge regional cooperation in 2026

One of the key developments shaping the outlook for 2026 is the consolidation of a new frontline in the [Benin, Niger, and Nigeria borderlands](#), which is now strategically important for both Sahelian and Nigerian militant groups.

Throughout 2025, JNIM and ISSP further entrenched their presence in this tri-border area, transforming it into a conflict hotspot with implications for both the Sahel and coastal West Africa (*see map below*). Northern Benin experienced its deadliest year on record as JNIM intensified cross-border operations from eastern Burkina Faso in April, culminating in the killing of over 50 soldiers in Park W. By midyear, the group had advanced further south into the Borgou department, along the border with Nigeria, marking a southward expansion of its operations beyond the northernmost regions of Atacora and Alibori.² JNIM also claimed its first attack in Nigeria in late October.³

JNIM and ISSP activity in the Benin-Niger-Nigeria borderlands

1 January 2024 - 28 November 2025



Meanwhile, ISSP reinforced its foothold in southwestern Niger, moving closer to the city of Gaya, on the border with Benin, and continued operations in Nigeria's Sokoto and Kebbi states. In the Niger-Nigeria border areas, the group attacked villages, security posts, and military patrols and sabotaged critical infrastructure. Both Sahelian groups have now established themselves in northwestern and western Nigeria.

The growing convergence between Sahelian and Nigerian militants represents a turning point, as the previously distinct Sahelian and Nigerian theaters gradually merge into a single, interconnected conflict environment stretching from Mali to western Nigeria. In the coming year, this subregion is likely to become a key arena of competition among militant groups. JNIM, ISSP, Ansaru, Mahmuda, Islamic State West Africa Province factions, and bandit groups increasingly overlap in these border areas. As their areas of operation expand into shared spaces, we may see increased interaction among these groups, with evolving dynamics and new patterns of violence across these borderlands.

While this tri-border expansion reshapes the southern frontline of the Sahelian conflict, the military regimes in the central Sahel face mounting internal and external pressures. In Mali and Burkina Faso, JNIM's sustained offensives, blockades, and sieges have weakened state control and exposed deep structural vulnerabilities. In Mali, the fuel and transport embargo continues to affect the economy and the movement of goods and people, intensifying hardship for civilians and undermining the regime's legitimacy. Prolonged disruption risks deepening existing fractures within the armed forces and triggering unrest that the junta may struggle to contain.

Burkina Faso faces similar challenges. Years of attrition have left the army and the VDP overstretched. JNIM's ability to temporarily seize major towns is not only indicative of the group's strategic and tactical evolution, but also its potential to target regional capitals like Fada N'Gourma in the east of the country, given the state's incapacity to effectively defend and secure departmental and provincial capitals. Continued heavy military casualties and territorial losses could generate the same internal dissent and coup pressures that brought down previous governments.

Across the central Sahel, state authority is steadily eroding, despite junta promises to restore security. JNIM and ISSP now contest sovereignty across vast rural territories, where they enforce their social order, tax the population, and condition access to livelihoods. Their influence is increasingly encroaching on major population centers once considered relatively insulated from militant activity. ISSP's incursions into Ayorou and Tillabéri, along with operations in Niamey, underscore that no population center is beyond militant reach.

Local self-defense groups, which are central to state counter-insurgency efforts in rural areas, are under unprecedented strain. In Mali, many [Dozo militias](#) have been disarmed or forced into agreements with JNIM, leaving entire communities dependent on militant-enforced arrangements for limited security and economic access. In Burkina Faso, the VDP – which was once central to Traoré's mobilization strategy – has suffered heavy losses and remains largely defensive, limiting the state's ability to hold or reclaim territory. As these groups weaken, militants are likely to expand their authority further.

Russia's military partnership with the Sahelian countries has achieved limited results. The replacement of the Wagner Group with Africa Corps effectively left large areas unprotected – Africa Corps has a more limited scope and has been unable to prevent military advances. However, toward the end of the year, Africa Corps' role increasingly shifted to securing fuel convoys and key supply routes in southern Mali,⁴ where JNIM's embargo began to lose momentum. The military partnership is likely to remain important in 2026, with Africa Corps providing essential logistical and aerial support to help the junta maintain control over major transit routes and urban centers, even as broader security challenges continue.

The combination of sustained militant pressure, weakened militias, and declining state capacity and legitimacy heightens the risk of political destabilization in the central Sahel. If either the Malian or Burkinabe military regimes succumb to internal divisions or popular unrest, a regional domino effect could occur, placing neighboring regimes in increasingly precarious positions. If current trends continue, 2026 may bring deeper political instability and territorial fragmentation in the central Sahel and along its southern borders.

Visual produced by Christian Jaffe.

Burkina Faso and Mali rank among the top 20 countries with the most deadly violence in the world.



Conflict Index

The ACLED Conflict Index is a global assessment of how and where conflicts in every country and territory in the world vary according to four indicators – deadliness, danger to civilians, geographic diffusion,

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Footnotes

- 1 [David Baché, "Mali: record number of foreign nationals kidnapped by jihadists," RFI, 14 November 2025 \(French\); Thomas Ladonne, "In six months, their number has almost doubled': In Mali, jihadists are abducting more and more foreigners," TV 5 Monde Info 14 November 2025 \(French\)](#)
- 2 [X@MENASTREAM, 12 June 2025; X@MENASTREAM, 9 October 2025](#)
- 3 [Yakubu Mohammed, "Al-Qaeda terror network in Sahel claims first attack in Nigeria," Premium Times, 31 October 2025](#)
- 4 [aBamako, "Russian assistance in the fuel crisis: The Russian Africa Corps was deployed at the request of the Malian authorities to secure fuel convoys," 24 November 2025](#)

COUNTRIES

Mali

Niger

Benin

Burkina Faso

Nigeria

REGIONS

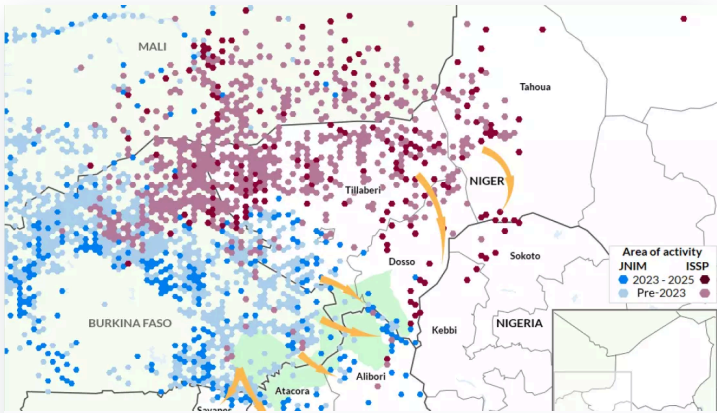
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Conflict in the Sahel

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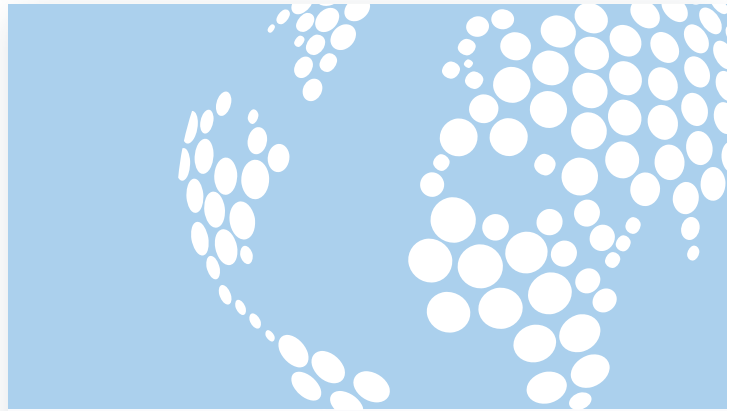
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