



# Mining Industry

South American Market

Business Hub

**Market Size: US \$ 92.28 bn** **Market Growth: 3.7% CAGR 2023-2028**

## Key Facts

✓ Increasing Surface Mining in Brazil, Chile and Peru

✓ Surface Mining Accounts for 77.5% of Equipment

✓ Mining Equipment Market is 8% of Global Mining Equipment Market

✓ Increasing Mineral Consumption in Chile, Peru and Argentina

 **Chile**

 **Peru**

Mining

**US \$317.2 bn**

**GDP** 15% of total GDP  
62% Exported

Mining

**US \$27.2 bn**

**GDP** 10% of total GDP  
63.9% Exported

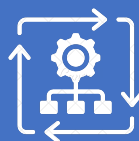
**World Leading Producer in Several Minerals**  
Supplies 28% of copper, 22% of lithium.  
Largest producer of Iodine, rhenium, sodium



**Mining Ownership and PPP**  
78% of mines privately owned. 28% state own and operated by CODELCO alongside private investors



**Future Project Developments**  
By 2027, 25 brownfield projects and 19 greenfield projects totalling US \$ 65.8bn



**Foreign Investor Incentives**  
Stable Income Tax, Free Profit Remittance, Favourable Exchange Rates, Equal Treatment with Domestic Competitors



**World Leading Producer**  
Largest gold producer in South America, second largest copper, silver and zinc



**Copper Investment Demand Rising**  
US \$91 bn investment needed in copper by 2030 to meet global demand



## Products in Demand

✓ **Crushers & Grinders**

✓ **Cranes & Lifting Technology**

✓ **Underground Drilling Technology**

✓ **Desalination Plants**

✓ **Air Pollution & Abatement Technology**

✓ **Critical Energy & Infrastructure Solutions**



Colombia



Argentina

Mining

**GDP**

**US \$16.2 bn**

**5% of total GDP**

**56% Exported**

Mining

**GDP**

**US \$15.2 bn**

**3.2% of total GDP**

**7.4% Exported**

**Leading Emerald Supplier**

High quality reputation with fewer impurities and high retail price



**Lithium Mining Growth**

70% of Lithium prospects have not been explored, positioning Argentina as world's 3<sup>rd</sup> largest lithium exporter

**Streamlined Regulatory Environment**

Government proactive in improving local regulations and managing local community relations



**US Market Share**

75% of mining equipment and technologies are US imports

**Need for Sustainable and Ethical Practices**

Companies innovating and focusing on the circular economy are needed to combat illegal operations



**Diversified Project Portfolio**

95 mines are advanced, 200 are in initial stages requiring solutions and investment

## Future Opportunities



**New Machinery Investments**

Desire for affordable mining equipment with longer life spans for use in surface mining operations



**Technological Revolution**

Sustainable energy coupled with remote operation machinery: excavators, loaders, trucks



**Industrial Equity and Community Resilience**

New entrants should be ethically focused considering community needs and the equitable distribution of mining benefits