

# Global Mining Chemicals Market Outlook to 2027

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## Abstracts

Mining chemicals are an integral part of mining activity, and they play a vital role in enhancing the productivity and efficiency of mining processes such as extraction, recovery, water treatment, transportation, and general equipment maintenance. According to BlueQuark Research & Consulting, the global mining chemicals market is expected to have a moderate growth rate during the forecast period. The major factors responsible for the growth of the global mining chemicals market are increased investment in mining exploration, a rising number of low-grade ores, and favorable government policies. Stringent regulations related to environmental degradation and carbon emission will restrain market growth for a short-term period. The value of mining chemicals is expected to propel in the coming years as the mining industry strives for efficient recoveries from ever lower-grade ores.

To meet rising global demand for metals and minerals, and hence to expand their reserve base, rapidly growing economies have witnessed increased spending on exploration in the last decade. Thus, their share of total exploration expenditure, both domestic and inbound, has increased from about 40% at the beginning of the decade to about 60% in recent years. Governments have benefitted highly from the direct and indirect taxes, royalties, and rents from the mining activities. In recent decades, many countries have also introduced new mining laws with the intention to unlock investment and kick-start exploration. Government initiatives, together with the rising interest of key players, are the driving factors of increased investment in mining exploration. In the metal mining processes, mining chemicals are required at different stages of processing of the ore; hence the increase in mining investments worldwide, especially in Canada, Australia, United States, Chile, Mexico, and a few African nations, is boosting the market for mining chemicals and will lead to its growth during the forecasted period. These investments are also fueling the economic growth of the respective countries. For instance, Australia spent more than 2.3 billion AUD on mining exploration in 2018-19. Australia is one of the top players in translating exploration investments into mineral

production. Over the last decade, mining is the country's largest source of export revenue and generated AUD 212 billion in company tax and royalties. These increases in investment for mining exploration are driven by higher fund allocations for copper and gold by producers.

At the beginning of 2020, Mexico mining companies outlined exploration spending of over USD 200 million with a lot of planning budget boosts following significant gold and silver price rises. In 2019, Mexico attracted more than USD 1.2 billion in foreign mining investments. Most investments came from companies in Spain, Germany, Israel, the United States, and Canada and focused on gold, copper, zinc, and uranium. Another vital mineral, coal, contributes 38% to global electricity generation that makes it an important part of the mining industry, and leads to continuous substantial capital investment and transaction focus.

India, the 3rd largest coal producer in the world, approved the National Steel Policy 2017 to increase the production capacity and foreign investment. The Indian government has in the prospect around USD 145 billion of investment in coal mining to increase coal capacity to 300 million tonnes by 2030-31. In 2019, the Indian government decided to allow 100% foreign direct investment in coal mining and contract manufacturing. In 2019, the second-largest gold mining company in the world, Barrick Gold, allocated USD 205 million for mining exploration in different regions of the world. Similarly, Rio Tinto, a global mining group, has been doing extensive mineral exploration in Zambia. The company has dedicated USD 250 million to mineral exploration worldwide, and a substantial amount is being spent in Zambia.

The mining industry deploys mining chemicals from the beginning of mining operation until the end product. Some of these chemicals are toxic to humans and the environment, such as Cyanide. Currently, around 75% of gold extracted from ore is processed using Cyanide or mercury. Continuous research and development activities are going to bring down the usage of such chemicals. In 2019, Australia's national science agency, CSIRO, developed a new technology to replace Cyanide. The cost-effective process replaces Cyanide with a safer, less hazardous chemical reagent, thiosulphate. This inorganic compound helps dissolve fine gold out of ores into a solution, which can then be recovered through further processing. The technology was developed over a decade and was trialed with Clean Mining's parent company Eco Minerals Research. Certain digital and biological technologies are also enabling mining companies to operate faster and more efficiently, enhance safety, streamline costs, and reduce their environmental footprint.

The global mining chemicals market is segmented on the basis of function and application. The application segment is further segmented as mineral processing, explosives & drilling, wastewater treatment, and others. Base metals processing constitutes a large section of mineral processing due to their large commercial and industrial applications such as construction and manufacturing. The rise in base metal mineral processing due to an increase in the usage of base metals is one of the major driving forces of the mining chemicals market.

Mineral processing is a procedure of treating crude ores of metals and mineral products to separate the valuables from the waste rock or gangue. The process is carried out to provide more concentrated material for the procedures of extractive metallurgy. Mineral processing includes exploration, extraction, smelting, refining, fabrication, and manufacturing of the final product. The increasing applications of metallic and non-metallic minerals are increasing mineral processing globally. Metallic mineral such as copper is extensively used in electrical and electronic devices. Chile is the world's largest producer of copper, with around one-third of its income obtained from copper exports. However, the country's copper production in 2019 dropped by 44,000 tonnes compared to 2018 due to the falling of ore grades at Escondida, Chile, the world's largest copper mine.

In December 2019, to tackle the issue of falling ore grade, Chile's Codelco announced an investment plan of USD 40 billion, aimed at upgrading aging mines and improving its pre-tax earnings for the coming years. The rising number of new mining ores globally is also increasing mineral processing. In 2019, Codelco opened the Chuquicamata underground mine, which is one of the largest and most advanced mines in the world. The mine has reserved for 1,028 million tonnes of copper ore and is expected to produce 320,000 tonnes of fine copper annually by around 2026. Similarly, in 2018 BHP approved a new USD 2.9 billion mines in resource-rich northwestern Australia to meet Chinese demand for higher-quality metals. The new mine is also expected to improve the quality of the ore recovered, increasing the iron grade from 61% to 62% and the proportion of lump from 25% to 35%.

On the basis of geography, the global mining chemicals market is segmented into North America, Europe, Asia-Pacific, South America, and the Middle East & Africa. Asia-Pacific is expected to be the dominant region in the global mining chemicals due to the rapid expansion of economies and vast availability of mineral resources.

Mining is one of Canada's primary industries and involves the extraction, refining, and processing of economically valuable rocks and minerals. In 2018, Canada's mining

industry contributed CAD 97 billion, or 5%, to Canada's total nominal GDP. As of 2018, total mining establishments in the country were about 1060 (of which 63 were metal and 997 were non-metals establishments). Provinces with most metal mines include Quebec, Ontario, and British Columbia. The main types of non-metal mines are sand and gravel, stone, and peat.

Canada is richly endowed with natural resources and ranks among the top five countries in the global production of 15 minerals and metals, many of which are integral to the low carbon technology needed for a greener future. Around 75% of the world's mining companies are headquartered in Canada, and in the hope to attract more investment in the mining industry, the various provincial governments in the country have introduced tax policy initiatives such as in 2019, the government of British Columbia announced plans to make two pre-existing mining tax credits permanent. Similarly, province authorities in Saskatchewan recently introduced the Targeted Mineral Exploration Incentive (TMEI) scheme as part of its more comprehensive Mineral Development Strategy. The country is also a significant supplier of responsibly sourced critical minerals, which are crucial to the global push to electrify mobility using lithium-ion batteries, which have pushed the market for cobalt. On the back of critical minerals supply being threatened by US-China trade friction in 2019, the US and Canada agreed to work together to mitigate the risk of supply chain disruptions of essential elements, which are majorly controlled by China. The Nico cobalt/gold/bismuth/copper project in Canada's Northwest Territories is among several advanced critical minerals projects in the country that could be fast-tracked to the production stage within this joint association.

In 2018, the capital spending in the Canadian mining industry valued at around CAD 12.9 billion, an increase of about 5.1% compared to the previous year. The investments related to mining are expected to continue to increase during the forecast period owing to the announcement of new projects by the federal government. Moreover, Canada is continuously working to spur innovation in the mining sector and improve its environmental performance by contributing to research and development in mining chemicals as well. Increased R&D and investments in developing and commercializing newer, more sophisticated chemicals are expected to push currently cheaper yet less efficient and environmentally hazardous alternatives out of the market. Several organizations are established in the country to develop greener technologies, such as Clean Mining Alliance which is working towards technological advancements to make the mining industry cleaner and more environmentally responsible. Moreover, in February 2020, the federal government of Canada announced CAD 3.5 million in funding to advance green energy technology in the Sudbury region, which is rich in

metallic ores and has almost 15 active mines. The area currently produces 51,000 tons of ore per day.

Some of the key players in the market are BASF SE, Clariant AG, Kemira Oyj, Solvay SA, and Chevron Philips Chemical Company, among others.

In January 2020, BASF invests in capacity expansion for methane sulfonic acid to 50,000 metric tons per year. This involves a higher double-digit million euro investment in constructing a new methane sulfonic acid plant at the Ludwigshafen site. The volumes from the additional capacity are expected to be available from the end of 2021 and are dedicated to mainly serve European customers as well as the rapidly growing Asian market.

In Dec 2019, AkzoNobel repurchased 462,075 of its own ordinary shares in the period from December 16, 2019, up to and including December 20, 2019. This finalizes a EUR 2.5 billion repurchase program announced on February 13, 2019, and completes a total distribution to shareholders of EUR 6.5 billion following the sale of the Specialty Chemicals business.

In May 2019, BASF entered an exclusive agreement with Quadra Chemicals Ltd., to represent its mining solutions portfolio of products in Canada and Alaska effective May 15, 2019.

Our Global Mining chemicals market report provides deep insight into the current and future state of the Mining chemicals market across various regions. Also, the study comprehensively analyzes the Mining chemicals market by segments based on Function (Flotation Agents (Collectors, Frothers, Depressants, Flocculates, Dispersants, Modifiers, and Activators), Extraction Chemicals(Extractants, Diluents), Grinding Aids), and by Application(Mineral processing, Explosives & Drilling, Wastewater Treatment, and others), and by Geography (Asia Pacific, North America, Europe, South America, and Middle-East and Africa). The report examines the market drivers and restraints, along with the impact of Covid-19 are influencing the market growth in detail. The study covers & includes emerging market trends, market developments, market opportunities, market size, market analysis, market dynamics, and challenges in the industry. This report also covers extensively researched competitive landscape sections with profiles of major companies, including their market share and projects.

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  - Argentina

West of South America  
Middle East & Africa  
South Africa  
Saudi Arabia

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*ies is not exhaustive*

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