

# The 2025-2030 World Outlook for Metal Ore Mining

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## Abstracts

This study covers the world outlook for metal ore mining across more than 190 countries. For each year reported, estimates are given for the latent demand, or potential industry earnings (P.I.E.), for the country in question (in millions of U.S. dollars), the percent share the country is of the region, and of the globe. These comparative benchmarks allow the reader to quickly gauge a country vis-à-vis others. Using econometric models which project fundamental economic dynamics within each country and across countries, latent demand estimates are created. This report does not discuss the specific players in the market serving the latent demand, nor specific details at the product level. The study also does not consider short-term cyclicalities that might affect realized sales. The study, therefore, is strategic in nature, taking an aggregate and long-run view, irrespective of the players or products involved.

This study covers metal ore mining as defined by the North American Industrial Classification system or NAICS (pronounced "nakes").

The NAICS code for metal ore mining is 2122. It is for this definition that aggregate latent demand estimates are derived. Metal ore mining is specifically defined as follows:

2122 This industry group comprises establishments primarily engaged in developing mine sites or mining metallic minerals, and establishments primarily engaged in ore dressing and beneficiating (i.e., preparing) operations, such as crushing, grinding, washing, drying, sintering, concentrating, calcining, and leaching. Beneficiating may be performed at mills operated in conjunction with the mines served or at mills, such as custom mills, operated separately.

21221 See industry description for 212210.

21222 This industry comprises establishments primarily engaged in developing the

mine site, mining, and/or beneficiating (i.e., preparing) ores valued chiefly for their gold and or silver content. Establishments primarily engaged in the transformation of the gold and silver into bullion or dore bar in combination with mining activities are included in this industry.

21223 This industry comprises establishments primarily engaged in developing the mine site, mining, and/or beneficiating (i.e., preparing) ores valued chiefly for their copper, nickel, lead, or zinc content. Beneficiating includes the transformation of ores into concentrates.

21229 This industry comprises establishments primarily engaged in developing the mine site, mining, and/or beneficiating (i.e., preparing) metal ores (except iron and manganiferous ores valued for their iron content, gold ore, silver ore, copper, nickel, lead, and zinc ore).

212210 This industry comprises establishments primarily engaged in (1) developing mine sites, mining, and/or beneficiating (i.e., preparing) iron ores and manganiferous ores valued chiefly for their iron content and/or (2) producing sinter iron ore (except iron ore produced in iron and steel mills) and other iron ore agglomerates.

212221 This U.S. industry comprises establishments primarily engaged in developing the mine site, mining, and/or beneficiating (i.e., preparing) ores valued chiefly for their gold content. Establishments primarily engaged in transformation of the gold into bullion or dore bar in combination with mining activities are included in this industry.

212222 This U.S. industry comprises establishments primarily engaged in developing the mine site, mining, and/or beneficiating (i.e., preparing) ores valued chiefly for their silver content. Establishments primarily engaged in transformation of the silver into bullion or dore bar in combination with mining activities are included in this industry.

212231 This U.S. industry comprises establishments primarily engaged in developing the mine site, mining, and/or beneficiating (i.e., preparing) lead ores, zinc ores, or lead-zinc ores.

212234 This U.S. industry comprises establishments primarily engaged in: (1) developing the mine site, mining, and/or beneficiating (i.e., preparing) copper and/or nickel ores; and (2) recovering copper concentrates by the precipitation, leaching, or electrowinning of copper ore.

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