

# **Mining Machinery Market by Machinery Category (Crushing, Pulverizing & Screening, Mineral Processing, Surface & Underground), Application, Power Output, Electric & Hybrid Machinery (Mining Trucks, LHD), Battery Chemistry Region - Global Forecast to 2030**

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## **Abstracts**

The mining machinery market is projected to grow from USD 24.8 billion in 2023 to USD 32.8 billion by 2030, at a CAGR of 4.1% from 2023 to 2030. The need for infrastructure development in developing countries is driving the demand for minerals and metals. As easily accessible mineral deposits become scarce, mining companies are compelled to explore and extract minerals from more challenging and remote locations. This requirement for specialized equipment to access and extract resources drives the demand for advanced mining machinery.

“Diesel segment is predicted to lead the mining machinery market during the forecast period.”

By propulsion, diesel-driven mining machinery is projected to dominate the market share with more than 95% across all considered regions. This is mainly due to the benefits offered by these engines. Diesel produces more torque at a lower speed compared to other fuels for the same power rating and combusts at a slower rate, hence resulting in better fuel efficiency. As it is a well-proven technology, diesel-operated machines are suitable to perform heavy-duty operations under harsh and rough conditions for long working hours in mining fields. Further, to cut the harmful gases to remain aligned with the stringent emission regulations, global OEMs are incorporating hybrid engines which mainly require an additional battery and motor to

work in parallel with diesel fuel. This will help in enhanced performance with lower emissions, thereby resulting in overall operational advantages. Though engines based on CNG/LNG/RNG are growing at a significant pace, however, owing to proven performance delivery, easy accessibility, and infrastructural challenges related to other alternative fuel & pure electric propulsion, the market of diesel-operated mining machinery will remain in the leading position under the review period.

“The mineral mining segment is estimated to be the largest and fastest for the mining machinery market, by application.”

Minerals mining is projected to remain dominant and like to grow at a higher rate for the application segment. The growth of the segment is mainly due to increased demand for metallic and non-metallic minerals such as iron, bauxite, copper, aluminium, gold, clay, limestone, gypsum, and sand among others in recent years. With the constant depletion of numerous global mineral reserves, mining operators need to find and extract minerals from increasingly challenging and remote locations. To meet this specific demand, the advanced and sophisticated mining machinery would become beneficial to unearth potential mineral deposits in these hard-to-reach terrains, leveraging cutting-edge exploration technologies, including remote sensing satellite imagery and geological modelling. Asian countries like China, Australia, and India are major players in mineral extraction along with some the African and South countries such as South Africa, Chile, and Peru. Further, growing demand for pollution-free mobility solutions and the use of renewable resources would prompt the higher demand for these minerals which subsequently boost the growth of mining machinery in the years to come.

“North America is the second largest market for mining machinery.”

North America is one of the dominant markets in the mining machinery industry as US and Canada have a higher demand for mining machines due to the presence of many active mines in the region. US's protectionist policies, which have increased demand for domestically extracted minerals, are expected to increase the demand for mining equipment in North America. Positive elements like low-interest rates will also boost spending in the mining sector. Apart from this, Canada has vast reserves of metals and minerals and exports 60 mineral commodities worldwide. It is a key global producer of copper, nickel, and cobalt and hosts advanced mineral projects for rare earth elements, lithium, and graphite. Thus, the growing demand for these rare minerals has led to an increase in extraction activities in mines in Canada which has further influenced the growth of the mining machinery market. Also, the presence of mining companies like Barrick Gold Corporation, Teck Resources Ltd., and Agnico Eagle Mines Ltd. would be

creating new growth opportunities for the mining machinery market.

The break-up of the profile of primary participants in the mining machinery market:

By Company Type: OEM – 70%, Tier 1 –20%, and Others – 10%

By Designation: Director Level – 30%, C Level – 30%, and Others – 40%,

By Region: North America – 10%, Europe – 10%, Asia Oceania – 60%, and South America – 20%

Prominent companies include Caterpillar Inc (US), Komatsu Ltd (Japan), Sandvik AB (Sweden), Epiroc AB (Sweden), and Liebherr (Switzerland), among others.

Research Coverage:

This research report categorizes the mining machinery market by different segments and regions. This includes by Machinery Category (Crushing, Pulverizing & Screening, Mineral Processing, Surface & Underground Mining), Application (Coal, Metal, Mineral), Power Output (2,000 HP), Electric & Hybrid Mining Machinery, by Type (Electric Mining Trucks, Electric LHD), Battery Chemistry (LFP, NMC, Others), Propulsion (Diesel, CNG/LNG/RNG), Autonomous Mining Machinery, by Mining Category (Surface & Mining Machinery), and Region (Asia Oceania, North America, Europe, South America & Middle East & Africa).

The report encompasses comprehensive details concerning the primary elements that impact the expansion of the mining machinery market, including driving forces, limitations, hurdles, and prospects. An extensive examination of the leading participants in the industry has been conducted to furnish insights into their corporate synopsis, offerings, and services. This encompasses principal tactics, affiliations, contracts, collaborations, introductions of novel products and services, amalgamations, and acquisitions, as well as the influence of economic downturns and recent advancements linked to the mining machinery market. Furthermore, this report addresses the competitive assessment of emerging startups within the mining machinery market environment.

Reasons to buy this report:

The report will help the market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall mining machinery market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the market pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (Increasing use of electric machinery in underground mining, Increased demand of metals and commodities, and rising count of active mines), restraints (Export of used mining machinery to developing countries, International trade policies and relations might restrict development of mining machinery market), opportunities (Use of autonomous mining machinery, Use of telematics in mining machinery), and challenges (Lack of standardization in mining machinery, Cyber-attacks would create a challenge for the growth of the mining machinery market during the forecast period) are influencing the growth of the mining machinery market.

**Product Development/Innovation:** Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the mining machinery market.

**Market Development:** Comprehensive information about lucrative markets – the report analyses the mining machinery market across varied regions.

**Market Diversification:** Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the mining machinery market

**Competitive Assessment:** In-depth assessment of market shares, growth strategies, and service offerings of leading players like Caterpillar Inc (US), Komatsu Ltd (Japan), Sandvik AB (Sweden), Epiroc AB (Sweden), and Liebherr (Switzerland) among others in the mining machinery market

The report also helps stakeholders understand the pulse of the mining machinery market by Machinery Category, Application, Power Output, Electric & Hybrid Mining

Machinery, Battery Chemistry, Propulsion, and Autonomous Mining Machinery used in the mining machinery market by providing them with information on key market drivers, restraints, challenges, and opportunities.

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