

Autonomous Mining Equipment Global Market Insights 2025, Analysis and Forecast to 2030, by Market Participants, Regions, Technology, Application, Product Type

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Abstracts

The Autonomous Mining Equipment market is a transformative segment within the mining industry, leveraging advanced automation technologies, artificial intelligence, and IoT to enhance operational efficiency, safety, and sustainability in mineral extraction. This equipment, including autonomous trucks, drilling rigs, underground loaders, and tunneling systems, reduces human intervention in hazardous environments, optimizes production, and lowers operational costs. Key characteristics include integration with real-time data analytics, GPS navigation, and remote monitoring systems, enabling precise and efficient mining operations. The market is driven by the global demand for minerals, increasing labor costs, and a push for safer, environmentally responsible mining practices. The global Autonomous Mining Equipment market is estimated to reach a valuation of approximately USD 3.0–5.0 billion in 2025, with compound annual growth rates projected in the range of 8.0%–14.0% through 2030. Growth is fueled by technological advancements, rising adoption in large-scale mining operations, and supportive government policies for automation. Challenges include high initial investment costs, regulatory hurdles, and workforce retraining needs. The market's strength lies in its ability to improve productivity and safety while aligning with sustainability goals in resource-intensive industries.

Application Analysis

Metal

Autonomous equipment in metal mining, such as for iron ore, copper, and gold, grows at 9%–15% annually, driven by demand for high-value metals in industries like electronics and renewable energy. Trends include the use of AI-driven analytics to optimize ore extraction and reduce waste, with a focus on integrating renewable energy sources into equipment operations.

Coal

Coal mining applications, growing at 7%–12% annually, leverage autonomous systems to enhance efficiency in declining but still significant coal markets. Trends emphasize retrofitting existing equipment with automation kits and remote operation systems to improve safety in high-risk environments.

Mineral

Mineral mining, including phosphates and rare earth elements, grows at 8%–13% annually, driven by demand for critical minerals in technology and green energy sectors. Trends include autonomous drilling and hauling systems tailored for precision extraction in diverse geological conditions.

By Type

Autonomous Mining/Hauling Trucks

Autonomous trucks dominate due to their role in large-scale material transport, growing at 9%–15% annually. Features like GPS-guided navigation and collision avoidance systems enhance efficiency. Trends include hybrid and electric trucks to reduce emissions, aligning with ESG goals.

Autonomous Drilling Rigs

Drilling rigs, growing at 8%–14% annually, offer precision and reduced downtime through automation. Trends focus on AI-optimized drilling patterns and remote operation for hazardous sites.

Underground LHD Loaders

Load-Haul-Dump (LHD) loaders for underground mining grow at 7%–13% annually, improving safety in confined spaces. Trends include sensor integration for real-time

navigation and productivity monitoring.

Tunneling Equipment

Tunneling equipment grows at 7%–12% annually, supporting underground mine development. Trends emphasize automation for complex geological environments and integration with digital twin technologies.

Others

Other equipment, such as autonomous dozers and graders, grows at 6%–11% annually, with innovations in modular automation systems for smaller operations.

Regional Market Distribution and Geographic Trends

North America: 8%–13% growth, led by the United States and Canada, where advanced mining operations and technology adoption drive demand. The U.S. focuses on autonomous trucks for metal mining, while Canada emphasizes minerals for clean energy.

Asia-Pacific: 9%–15% growth, with Australia and China leading due to large-scale mining and government support for automation. India's growing mineral sector boosts demand for cost-effective solutions.

Europe: 7%–12% growth, with Sweden and Finland prioritizing autonomous systems for sustainable mining under strict environmental regulations.

Latin America: 8%–14% growth, driven by Brazil and Chile's metal mining sectors, particularly copper and lithium, with a focus on safety and efficiency.

Middle East & Africa: 7%–12% growth, with South Africa and Saudi Arabia adopting automation for mineral and metal extraction to enhance global competitiveness.

Key Market Players and Competitive Landscape

Caterpillar Inc. leads with autonomous trucks and retrofit solutions, emphasizing IoT integration for global mining operations. Komatsu Ltd. offers advanced autonomous hauling systems, popular in Asia-Pacific and Australia. Sandvik AB and Epiroc AB specialize in underground loaders and drilling rigs, with a strong European presence.

Hitachi Construction Machinery Co. Ltd. provides tailored automation for metal mining, while Rio Tinto and Vale S.A. integrate autonomous systems into their operations, driving innovation. Aktiebolaget Volvo and Liebherr Group focus on sustainable equipment, with hybrid and electric options. Atlas Copco AB, Terex Corporation, and Metso Outotec offer niche solutions, while Zoomlion Heavy Industry, HD Hyundai Infracore, and Sany Heavy Industry Co. Ltd. cater to Asia-Pacific's growing demand.

Industry Value Chain Analysis

The value chain for Autonomous Mining Equipment is technology-intensive, spanning component manufacturing, system integration, and operational deployment, with significant value in automation and data analytics.

Raw Materials and Upstream Supply

Raw materials include sensors, microchips, and durable alloys, sourced from electronics and metal suppliers. Companies like Caterpillar integrate with sustainable suppliers to ensure high-quality components, supporting reliability in harsh mining environments.

Production and Processing

Manufacturing involves assembling equipment with embedded AI, sensors, and communication systems, requiring precision engineering. Producers like Komatsu invest in R&D for autonomous navigation and energy-efficient designs, adhering to safety and environmental standards.

Distribution and Logistics

Distribution focuses on delivering heavy equipment and software updates to global mining sites, with logistics optimized for large-scale transport. Exports from North America, Europe, and Asia-Pacific ensure supply, with digital platforms supporting remote maintenance and upgrades.

Downstream Processing and Application Integration

Metal/Coal/Mineral: Tailored for specific mining needs, enhancing efficiency.

Trucks/Drills/Loaders: Integrated into mining workflows for productivity.

Downstream value lies in system integration with mine management software, reducing costs and improving safety through automation.

End-User Industries

Mining companies capture value through increased productivity, safety, and sustainability, with autonomous equipment enabling higher output and regulatory compliance.

Market Opportunities and Challenges

Opportunities

Rising global demand for minerals, particularly for renewable energy, offers significant growth potential, especially in Asia-Pacific and Latin America. Advancements in AI and IoT enable smarter, more efficient equipment, while sustainability trends drive adoption of electric and hybrid systems. Government incentives for automation and partnerships with tech firms enhance market expansion, particularly for safety-focused solutions.

Challenges

High initial costs and long ROI periods deter smaller operators, while regulatory variations across regions complicate deployment. Workforce retraining and resistance to automation pose challenges, alongside cybersecurity risks in connected systems. Supply chain disruptions for critical components like semiconductors and environmental concerns over equipment disposal require innovative solutions.

Contents

CHAPTER 1 EXECUTIVE SUMMARY

CHAPTER 2 ABBREVIATION AND ACRONYMS

CHAPTER 3 PREFACE

3.1 Research Scope

3.2 Research Sources

3.2.1 Data Sources

3.2.2 Assumptions

3.3 Research Method

Chapter Four Market Landscape

4.1 Market Overview

4.2 Classification/Types

4.3 Application/End Users

CHAPTER 5 MARKET TREND ANALYSIS

5.1 Introduction

5.2 Drivers

5.3 Restraints

5.4 Opportunities

5.5 Threats

CHAPTER 6 INDUSTRY CHAIN ANALYSIS

6.1 Upstream/Suppliers Analysis

6.2 Autonomous Mining Equipment Analysis

6.2.1 Technology Analysis

6.2.2 Cost Analysis

6.2.3 Market Channel Analysis

6.3 Downstream Buyers/End Users

CHAPTER 7 LATEST MARKET DYNAMICS

7.1 Latest News

7.2 Merger and Acquisition

- 7.3 Planned/Future Project
- 7.4 Policy Dynamics

CHAPTER 8 HISTORICAL AND FORECAST AUTONOMOUS MINING EQUIPMENT MARKET IN NORTH AMERICA (2020-2030)

- 8.1 Autonomous Mining Equipment Market Size
- 8.2 Autonomous Mining Equipment Market by End Use
- 8.3 Competition by Players/Suppliers
- 8.4 Autonomous Mining Equipment Market Size by Type
- 8.5 Key Countries Analysis
 - 8.5.1 United States
 - 8.5.2 Canada
 - 8.5.3 Mexico

CHAPTER 9 HISTORICAL AND FORECAST AUTONOMOUS MINING EQUIPMENT MARKET IN SOUTH AMERICA (2020-2030)

- 9.1 Autonomous Mining Equipment Market Size
- 9.2 Autonomous Mining Equipment Market by End Use
- 9.3 Competition by Players/Suppliers
- 9.4 Autonomous Mining Equipment Market Size by Type
- 9.5 Key Countries Analysis

CHAPTER 10 HISTORICAL AND FORECAST AUTONOMOUS MINING EQUIPMENT MARKET IN ASIA & PACIFIC (2020-2030)

- 10.1 Autonomous Mining Equipment Market Size
- 10.2 Autonomous Mining Equipment Market by End Use
- 10.3 Competition by Players/Suppliers
- 10.4 Autonomous Mining Equipment Market Size by Type
- 10.5 Key Countries Analysis
 - 10.5.1 China
 - 10.5.2 India
 - 10.5.3 Japan
 - 10.5.4 South Korea
 - 10.5.5 Southeast Asia
 - 10.5.6 Australia & New Zealand

CHAPTER 11 HISTORICAL AND FORECAST AUTONOMOUS MINING EQUIPMENT MARKET IN EUROPE (2020-2030)

- 11.1 Autonomous Mining Equipment Market Size
- 11.2 Autonomous Mining Equipment Market by End Use
- 11.3 Competition by Players/Suppliers
- 11.4 Autonomous Mining Equipment Market Size by Type
- 11.5 Key Countries Analysis
 - 11.5.1 Germany
 - 11.5.2 France
 - 11.5.3 United Kingdom
 - 11.5.4 Italy
 - 11.5.5 Spain
 - 11.5.6 Belgium
 - 11.5.7 Netherlands
 - 11.5.8 Austria
 - 11.5.9 Poland
 - 11.5.10 Northern Europe

CHAPTER 12 HISTORICAL AND FORECAST AUTONOMOUS MINING EQUIPMENT MARKET IN MEA (2020-2030)

- 12.1 Autonomous Mining Equipment Market Size
- 12.2 Autonomous Mining Equipment Market by End Use
- 12.3 Competition by Players/Suppliers
- 12.4 Autonomous Mining Equipment Market Size by Type
- 12.5 Key Countries Analysis

CHAPTER 13 SUMMARY FOR GLOBAL AUTONOMOUS MINING EQUIPMENT MARKET (2020-2025)

- 13.1 Autonomous Mining Equipment Market Size
- 13.2 Autonomous Mining Equipment Market by End Use
- 13.3 Competition by Players/Suppliers
- 13.4 Autonomous Mining Equipment Market Size by Type

CHAPTER 14 GLOBAL AUTONOMOUS MINING EQUIPMENT MARKET FORECAST (2025-2030)

- 14.1 Autonomous Mining Equipment Market Size Forecast
- 14.2 Autonomous Mining Equipment Application Forecast
- 14.3 Competition by Players/Suppliers
- 14.4 Autonomous Mining Equipment Type Forecast

CHAPTER 15 ANALYSIS OF GLOBAL KEY VENDORS

15.1 Caterpillar Inc.

15.1.1 Company Profile

15.1.2 Main Business and Autonomous Mining Equipment Information

15.1.3 SWOT Analysis of Caterpillar Inc.

15.1.4 Caterpillar Inc. Autonomous Mining Equipment Revenue, Gross Margin and Market Share (2020-2025)

15.2 Komatsu Ltd.

15.2.1 Company Profile

15.2.2 Main Business and Autonomous Mining Equipment Information

15.2.3 SWOT Analysis of Komatsu Ltd.

15.2.4 Komatsu Ltd. Autonomous Mining Equipment Revenue, Gross Margin and Market Share (2020-2025)

15.3 Sandvik AB

15.3.1 Company Profile

15.3.2 Main Business and Autonomous Mining Equipment Information

15.3.3 SWOT Analysis of Sandvik AB

15.3.4 Sandvik AB Autonomous Mining Equipment Revenue, Gross Margin and Market Share (2020-2025)

15.4 Epiroc AB

15.4.1 Company Profile

15.4.2 Main Business and Autonomous Mining Equipment Information

15.4.3 SWOT Analysis of Epiroc AB

15.4.4 Epiroc AB Autonomous Mining Equipment Revenue, Gross Margin and Market Share (2020-2025)

15.5 Hitachi Construction Machinery Co. Ltd.

15.5.1 Company Profile

15.5.2 Main Business and Autonomous Mining Equipment Information

15.5.3 SWOT Analysis of Hitachi Construction Machinery Co. Ltd.

15.5.4 Hitachi Construction Machinery Co. Ltd. Autonomous Mining Equipment Revenue, Gross Margin and Market Share (2020-2025)

15.6 Rio Tinto

15.6.1 Company Profile

- 15.6.2 Main Business and Autonomous Mining Equipment Information
- 15.6.3 SWOT Analysis of Rio Tinto
- 15.6.4 Rio Tinto Autonomous Mining Equipment Revenue, Gross Margin and Market Share (2020-2025)
- 15.7 Vale S.A.
 - 15.7.1 Company Profile
 - 15.7.2 Main Business and Autonomous Mining Equipment Information
 - 15.7.3 SWOT Analysis of Vale S.A.
 - 15.7.4 Vale S.A. Autonomous Mining Equipment Revenue, Gross Margin and Market Share (2020-2025)
- 15.8 Aktiebolaget Volvo
 - 15.8.1 Company Profile
 - 15.8.2 Main Business and Autonomous Mining Equipment Information
 - 15.8.3 SWOT Analysis of Aktiebolaget Volvo
 - 15.8.4 Aktiebolaget Volvo Autonomous Mining Equipment Revenue, Gross Margin and Market Share (2020-2025)
- 15.9 Liebherr Group
 - 15.9.1 Company Profile
 - 15.9.2 Main Business and Autonomous Mining Equipment Information
 - 15.9.3 SWOT Analysis of Liebherr Group
 - 15.9.4 Liebherr Group Autonomous Mining Equipment Revenue, Gross Margin and Market Share (2020-2025)
- 15.10 Atlas Copco AB
 - 15.10.1 Company Profile
 - 15.10.2 Main Business and Autonomous Mining Equipment Information
 - 15.10.3 SWOT Analysis of Atlas Copco AB
 - 15.10.4 Atlas Copco AB Autonomous Mining Equipment Revenue, Gross Margin and Market Share (2020-2025)

Please ask for sample pages for full companies list

Tables & Figures

TABLES AND FIGURES

Table Abbreviation and Acronyms

Table Research Scope of Autonomous Mining Equipment Report

Table Data Sources of Autonomous Mining Equipment Report

Table Major Assumptions of Autonomous Mining Equipment Report

Figure Market Size Estimated Method

Figure Major Forecasting Factors

Figure Autonomous Mining Equipment Picture

Table Autonomous Mining Equipment Classification

Table Autonomous Mining Equipment Applications

Table Drivers of Autonomous Mining Equipment Market

Table Restraints of Autonomous Mining Equipment Market

Table Opportunities of Autonomous Mining Equipment Market

Table Threats of Autonomous Mining Equipment Market

Table COVID-19 Impact for Autonomous Mining Equipment Market

Table Raw Materials Suppliers

Table Different Production Methods of Autonomous Mining Equipment

Table Cost Structure Analysis of Autonomous Mining Equipment

Table Key End Users

Table Latest News of Autonomous Mining Equipment Market

Table Merger and Acquisition

Table Planned/Future Project of Autonomous Mining Equipment Market

Table Policy of Autonomous Mining Equipment Market

Table 2020-2030 North America Autonomous Mining Equipment Market Size

Figure 2020-2030 North America Autonomous Mining Equipment Market Size and CAGR

Table 2020-2030 North America Autonomous Mining Equipment Market Size by Application

Table 2020-2025 North America Autonomous Mining Equipment Key Players Revenue

Table 2020-2025 North America Autonomous Mining Equipment Key Players Market Share

Table 2020-2030 North America Autonomous Mining Equipment Market Size by Type

Table 2020-2030 United States Autonomous Mining Equipment Market Size

Table 2020-2030 Canada Autonomous Mining Equipment Market Size

Table 2020-2030 Mexico Autonomous Mining Equipment Market Size

Table 2020-2030 South America Autonomous Mining Equipment Market Size

Figure 2020-2030 South America Autonomous Mining Equipment Market Size and CAGR

Table 2020-2030 South America Autonomous Mining Equipment Market Size by Application

Table 2020-2025 South America Autonomous Mining Equipment Key Players Revenue

Table 2020-2025 South America Autonomous Mining Equipment Key Players Market Share

Table 2020-2030 South America Autonomous Mining Equipment Market Size by Type

Table 2020-2030 Asia & Pacific Autonomous Mining Equipment Market Size

Figure 2020-2030 Asia & Pacific Autonomous Mining Equipment Market Size and CAGR

Table 2020-2030 Asia & Pacific Autonomous Mining Equipment Market Size by Application

Table 2020-2025 Asia & Pacific Autonomous Mining Equipment Key Players Revenue

Table 2020-2025 Asia & Pacific Autonomous Mining Equipment Key Players Market Share

Table 2020-2030 Asia & Pacific Autonomous Mining Equipment Market Size by Type

Table 2020-2030 China Autonomous Mining Equipment Market Size

Table 2020-2030 India Autonomous Mining Equipment Market Size

Table 2020-2030 Japan Autonomous Mining Equipment Market Size

Table 2020-2030 South Korea Autonomous Mining Equipment Market Size

Table 2020-2030 Southeast Asia Autonomous Mining Equipment Market Size

Table 2020-2030 Australia & New Zealand Autonomous Mining Equipment Market Size

Table 2020-2030 Europe Autonomous Mining Equipment Market Size

Figure 2020-2030 Europe Autonomous Mining Equipment Market Size and CAGR

Table 2020-2030 Europe Autonomous Mining Equipment Market Size by Application

Table 2020-2025 Europe Autonomous Mining Equipment Key Players Revenue

Table 2020-2025 Europe Autonomous Mining Equipment Key Players Market Share

Table 2020-2030 Europe Autonomous Mining Equipment Market Size by Type

Table 2020-2030 Germany Autonomous Mining Equipment Market Size

Table 2020-2030 France Autonomous Mining Equipment Market Size

Table 2020-2030 United Kingdom Autonomous Mining Equipment Market Size

Table 2020-2030 Italy Autonomous Mining Equipment Market Size

Table 2020-2030 Spain Autonomous Mining Equipment Market Size

Table 2020-2030 Belgium Autonomous Mining Equipment Market Size

Table 2020-2030 Netherlands Autonomous Mining Equipment Market Size

Table 2020-2030 Austria Autonomous Mining Equipment Market Size

Table 2020-2030 Poland Autonomous Mining Equipment Market Size

Table 2020-2030 Northern Europe Autonomous Mining Equipment Market Size

Table 2020-2030 MEA Autonomous Mining Equipment Market Size
Figure 2020-2030 MEA Autonomous Mining Equipment Market Size and CAGR
Table 2020-2030 MEA Autonomous Mining Equipment Market Size by Application
Table 2020-2025 MEA Autonomous Mining Equipment Key Players Revenue
Table 2020-2025 MEA Autonomous Mining Equipment Key Players Market Share
Table 2020-2030 MEA Autonomous Mining Equipment Market Size by Type
Table 2020-2025 Global Autonomous Mining Equipment Market Size by Region
Table 2020-2025 Global Autonomous Mining Equipment Market Size Share by Region
Table 2020-2025 Global Autonomous Mining Equipment Market Size by Application
Table 2020-2025 Global Autonomous Mining Equipment Market Share by Application
Table 2020-2025 Global Autonomous Mining Equipment Key Vendors Revenue
Figure 2020-2025 Global Autonomous Mining Equipment Market Size and Growth Rate
Table 2020-2025 Global Autonomous Mining Equipment Key Vendors Market Share
Table 2020-2025 Global Autonomous Mining Equipment Market Size by Type
Table 2020-2025 Global Autonomous Mining Equipment Market Share by Type
Table 2025-2030 Global Autonomous Mining Equipment Market Size by Region
Table 2025-2030 Global Autonomous Mining Equipment Market Size Share by Region
Table 2025-2030 Global Autonomous Mining Equipment Market Size by Application
Table 2025-2030 Global Autonomous Mining Equipment Market Share by Application
Table 2025-2030 Global Autonomous Mining Equipment Key Vendors Revenue
Figure 2025-2030 Global Autonomous Mining Equipment Market Size and Growth Rate
Table 2025-2030 Global Autonomous Mining Equipment Key Vendors Market Share
Table 2025-2030 Global Autonomous Mining Equipment Market Size by Type
Table 2025-2030 Autonomous Mining Equipment Global Market Share by Type
Table Caterpillar Inc. Information
Table SWOT Analysis of Caterpillar Inc.
Table 2020-2025 Caterpillar Inc. Autonomous Mining Equipment Revenue Gross Profit Margin
Figure 2020-2025 Caterpillar Inc. Autonomous Mining Equipment Revenue and Growth Rate
Figure 2020-2025 Caterpillar Inc. Autonomous Mining Equipment Market Share
Table Komatsu Ltd. Information
Table SWOT Analysis of Komatsu Ltd.
Table 2020-2025 Komatsu Ltd. Autonomous Mining Equipment Revenue Gross Profit Margin
Figure 2020-2025 Komatsu Ltd. Autonomous Mining Equipment Revenue and Growth Rate
Figure 2020-2025 Komatsu Ltd. Autonomous Mining Equipment Market Share
Table Sandvik AB Information

Table SWOT Analysis of Sandvik AB

Table 2020-2025 Sandvik AB Autonomous Mining Equipment Revenue Gross Profit Margin

Figure 2020-2025 Sandvik AB Autonomous Mining Equipment Revenue and Growth Rate

Figure 2020-2025 Sandvik AB Autonomous Mining Equipment Market Share

Table Epiroc AB Information

Table SWOT Analysis of Epiroc AB

Table 2020-2025 Epiroc AB Autonomous Mining Equipment Revenue Gross Profit Margin

Figure 2020-2025 Epiroc AB Autonomous Mining Equipment Revenue and Growth Rate

Figure 2020-2025 Epiroc AB Autonomous Mining Equipment Market Share

Table Hitachi Construction Machinery Co. Ltd. Information

Table SWOT Analysis of Hitachi Construction Machinery Co. Ltd.

Table 2020-2025 Hitachi Construction Machinery Co. Ltd. Autonomous Mining Equipment Revenue Gross Profit Margin

Figure 2020-2025 Hitachi Construction Machinery Co. Ltd. Autonomous Mining Equipment Revenue and Growth Rate

Figure 2020-2025 Hitachi Construction Machinery Co. Ltd. Autonomous Mining Equipment Market Share

Table Rio Tinto Information

Table SWOT Analysis of Rio Tinto

Table 2020-2025 Rio Tinto Autonomous Mining Equipment Revenue Gross Profit Margin

Figure 2020-2025 Rio Tinto Autonomous Mining Equipment Revenue and Growth Rate

Figure 2020-2025 Rio Tinto Autonomous Mining Equipment Market Share

Table Vale S.A. Information

Table SWOT Analysis of Vale S.A.

Table 2020-2025 Vale S.A. Autonomous Mining Equipment Revenue Gross Profit Margin

Figure 2020-2025 Vale S.A. Autonomous Mining Equipment Revenue and Growth Rate

Figure 2020-2025 Vale S.A. Autonomous Mining Equipment Market Share

Table Aktiebolaget Volvo Information

Table SWOT Analysis of Aktiebolaget Volvo

Table 2020-2025 Aktiebolaget Volvo Autonomous Mining Equipment Revenue Gross Profit Margin

Figure 2020-2025 Aktiebolaget Volvo Autonomous Mining Equipment Revenue and Growth Rate

Figure 2020-2025 Aktiebolaget Volvo Autonomous Mining Equipment Market Share

Table Liebherr Group Information

Table SWOT Analysis of Liebherr Group

Table 2020-2025 Liebherr Group Autonomous Mining Equipment Revenue Gross Profit Margin

Figure 2020-2025 Liebherr Group Autonomous Mining Equipment Revenue and Growth Rate

Figure 2020-2025 Liebherr Group Autonomous Mining Equipment Market Share

Table Atlas Copco AB Information

Table SWOT Analysis of Atlas Copco AB

Table 2020-2025 Atlas Copco AB Autonomous Mining Equipment Revenue Gross Profit Margin

Figure 2020-2025 Atlas Copco AB Autonomous Mining Equipment Revenue and Growth Rate

Figure 2020-2025 Atlas Copco AB Autonomous Mining Equipment Market Share

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