

Underground Mining Diamond Drilling Market Forecasts to 2030 – Global Analysis By Type (Rotary Drilling and Wireline Drilling), Drilling Type (Core Drilling, Non-Core Drilling, Directional Drilling and Reverse Circulation Drilling), Equipment Type, Application, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Underground Mining Diamond Drilling Market is accounted for \$602.90 million in 2024 and is expected to reach \$986.87 million by 2030 growing at a CAGR of 8.56% during the forecast period. Underground Mining Diamond Drilling is a specialized technique employed to extract core samples from beneath the earth's surface, primarily in mining operations aimed at identifying and assessing mineral deposits. Diamond-embedded drill bits, which are very good at precisely and efficiently cutting through hard rock formations, are used in this technique. Critical geological information, such as the composition, structure, and mineral content of the targeted area, is provided by the extracted core samples, allowing mining companies to assess the feasibility of additional excavation. Moreover, diamond drilling for underground mining is frequently chosen because it can yield high-quality, intact core samples, guaranteeing precise analysis with the least amount of disturbance to nearby strata.

According to the International Council on Mining and Metals (ICMM), the adoption of advanced diamond drilling technologies is enhancing the efficiency and safety of underground mining operations, contributing to the growth of the market. ICMM members are collaborating with original equipment manufacturers (OEMs) to promote operational and technological innovations that will enable mining operations to introduce emission-free surface mining vehicles by 2040.

Market Dynamics:

Driver:

Growing interest in metals and minerals

One of the main factors driving the underground mining diamond drilling market is the increasing demand for minerals and metals around the world due to urbanization and industrialization. Demand is high for rare earth elements, base metals like copper and zinc, and precious metals like gold and silver that are used in electronics and renewable energy systems. Additionally, the need for efficient exploration methods has been further highlighted by the drive for electric vehicles (EVs) and renewable energy infrastructure, both of which require large amounts of lithium, cobalt, and other essential minerals.

Restraint:

Expensive initial investment costs

The high upfront costs of acquiring and implementing cutting-edge diamond drilling equipment are one of the main factors limiting the market for underground mining diamond drilling. Significant capital investment is needed for modern rigs with automated systems, real-time data analytics, and long-lasting diamond drill bits. Furthermore, increasing the financial burden and discouraging some businesses from utilizing this technology are the costs associated with maintaining and modernizing these devices as well as training staff to use them efficiently.

Opportunity:

Adoption of digital and automation technologies

The diamond drilling market is seeing new growth prospects as a result of the incorporation of digital and automated technologies into underground mining operations. Artificial intelligence (AI) and remote control systems on automated drilling rigs make it possible to operate in dangerous subterranean environments more safely and effectively. Additionally, mining companies can utilize technologies like geospatial mapping tools, predictive maintenance systems, and real-time data monitoring to enhance decision-making and optimize drilling procedures.

Threat:

Recession risks and economic uncertainty

Economic instability, whether global or regional, is a major threat to the underground mining diamond drilling market. The cyclical nature of the mining industry makes this problem worse because exploration budgets are frequently the first to be slashed during economic downturns. These uncertainties can create an unpredictable business environment for drilling companies, affecting both demand and profitability. Furthermore, recessionary trends, inflation, or financial crises can result in reduced capital expenditure in the mining industry, forcing companies to delay or scale back exploration projects.

Covid-19 Impact:

Due to lockdowns, travel restrictions, and a lack of workers, the COVID-19 pandemic severely disrupted the underground mining diamond drilling market, delaying exploration projects and upsetting supply chains. The temporary suspension of mining activities in a number of areas resulted in a decline in the demand for drilling equipment and services. Additionally, as businesses prioritized cost-cutting measures during the economic downturn, capital expenditures in the mining sector decreased. But as restrictions loosened, the market started to rebound, with a renewed emphasis on remote operations, automation, and health and safety protocols to guarantee business continuity in the event of future crises.

The Wireline Drilling segment is expected to be the largest during the forecast period

The market for diamond drilling for underground mining is expected to be dominated by the wireline drilling segment. It is perfect for mineral exploration because of its effectiveness, accuracy, and capacity to extract high-quality core samples without removing the entire drill string. The preferred technique in contemporary mining operations, wireline drilling drastically lowers operating expenses and downtime. Moreover, the use of wireline drilling in underground mining projects has also increased as a result of technological developments like lighter equipment and enhanced core recovery systems.

The Drilling Rigs segment is expected to have the highest CAGR during the forecast period

The drilling rigs segment of the underground mining diamond drilling market is anticipated to grow at the highest CAGR over the course of the forecast period. Drilling rigs are the foundation of diamond drilling operations and are necessary for the efficient extraction of geological resources. Their role is critical in enabling precise and effective drilling, which directly impacts the overall productivity and success of mining projects. Additionally, the segment is expected to grow significantly due to the growing demand for minerals and the need for advanced drilling technologies.

Region with largest share:

The North America region is expected to have the largest market share in the underground mining diamond drilling market. The sophisticated mining infrastructure, large investments in mineral extraction, and the presence of important industry players are the reasons for this region's dominance. With businesses offering complete drilling solutions, such as core drill bits and entire drill rigs, the US leads the market in particular. Furthermore, North America's dominant position in the market is further supported by the continued demand for minerals and the use of cutting-edge drilling technologies.

Region with highest CAGR:

The Asia-Pacific (APAC) region is anticipated to witness the highest CAGR in the underground mining diamond drilling market. This is fueled by the quick infrastructure development and industrialization of important nations like China and India, which are significant mining industry participants. Growth in this area is being driven by the rising demand for minerals, improvements in drilling technology, and investments in mining exploration. Moreover, the strong growth forecast for the APAC market is also influenced by the need for economical and effective drilling solutions in growing mining operations.

Key players in the market

Some of the key players in Underground Mining Diamond Drilling market include Boart Longyear Ltd., Epiroc AB, Sandvik AB, Anglo American plc, Fordia, VersaDrill Canada, Barrick Gold Corporation, Zinex Mining Corp, Wuxi Geological Drilling Equipment Co., Ltd, Geomachine Oy, Sinocoredrill Group Co, Atlas Copco AB, Goldcorp Inc., Newmont Corporation and Indium Corporation.

Key Developments:

In November 2024, Global mining company Anglo American has reached an agreement to sell its 33.3% stake in Jellinbah Group – a joint venture (JV) that holds a 70% ownership in the Jellinbah East and Lake Vermont steelmaking coal mines in Australia – to Zashvin for A\$1.6bn (\$1.1bn). Zashvin, alongside Anglo American and Marubeni, holds an existing 33.3% share in Jellinbah Group.

In May 2024, Swedish equipment manufacturer Epiroc has agreed to acquire the remaining 66% interest in US-based Company ASI Mining for an undisclosed sum. ASI Mining provides mining automation systems, which include remote control, teleoperation, and fully autonomous solutions.

In December 2023, Drilling services company Boart Longyear has agreed to a takeover by American Industrial Partners Capital Fund VIII in a deal that values its stock at around US\$371 million. The Utah-based, Australia-listed company said its directors unanimously recommend the takeover and that its five largest shareholders—who in aggregate control almost 99% of Boart Longyear's common shares—have agreed to vote in favor of the deal.

Types Covered:

Rotary Drilling

Wireline Drilling

Drilling Types Covered:

Core Drilling

Non-Core Drilling

Directional Drilling

Reverse Circulation Drilling

Equipment Types Covered:

Drilling Rigs

Diamond Drill Bits

Accessories

Support Equipment

Applications Covered:

Hard Rock

Soft Rock

End Users Covered:

Mining

Construction

Oil & Gas

Environmental

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2022, 2023, 2024, 2026, and 2030
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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