

# Asia-Pacific Rotary Blasthole Drilling Rig Market By Type (Large-range Drilling Rig, Mid-range Drilling Rig, and Others), By Power (Electric, Diesel, Hybrid), By Application (Quarries, Open-Pit Mining, and Others), By Country, Competition, Forecast and Opportunities, 2020-2030F

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## Abstracts

### Market Overview

The Asia-Pacific Rotary Blasthole Drilling Rig Market was valued at USD 960.41 million in 2024 and is projected to reach USD 1,261.24 million by 2030, growing at a CAGR of 4.49% during the forecast period. The market is witnessing consistent growth, primarily driven by increased mining activities in emerging economies, rising demand for mineral resources, and ongoing advancements in drilling technologies. Countries including China, India, Australia, and Indonesia are leading regional demand due to vast mineral reserves and expanding mining operations. Australia stands out as a market leader, supported by a mature mining sector and investments in automation and sustainability. Meanwhile, China and India are fueling growth through policies promoting domestic mineral production and reduced reliance on imports. Technological innovations—such as automation, remote monitoring, and data analytics—are transforming the industry, enhancing drilling precision and operational efficiency. Despite market expansion, challenges like fluctuating commodity prices and stringent environmental regulations continue to influence capital investments in advanced drilling solutions.

### Key Market Drivers

## Expansion of Surface Mining Operations Across the Region

Surface mining operations are expanding rapidly throughout the Asia-Pacific region, significantly driving demand for rotary blasthole drilling rigs. Countries like Australia, India, and Indonesia rely heavily on surface mining to extract key resources such as iron ore, coal, and bauxite. The method's efficiency in large-scale mineral extraction requires high-capacity rotary rigs for blasthole drilling. For instance, Australia produced over 1.1 billion metric tons of iron ore in 2023, predominantly from surface mines. Similarly, Indonesia's coal output exceeded 710 million metric tons, reinforcing the need for reliable and high-performance rotary drilling systems. This demand is further bolstered by the global transition to green energy, which is increasing the need for metals like copper, nickel, and lithium. Government policies aimed at mineral exploration—such as India's new licensing reforms—also support the expansion of surface mining and, consequently, the use of rotary blasthole rigs.

### Key Market Challenges

#### High Initial Capital Investment and Ownership Costs

A significant challenge in the Asia-Pacific rotary blasthole drilling rig market is the high initial investment required to acquire advanced equipment. The cost of purchasing a large rotary rig can range from USD 1 million to 3 million, depending on its features and capacity. Beyond the purchase price, operators incur recurring expenses related to training, maintenance, and spare parts, often adding 20–30% to annual ownership costs. These financial demands can be prohibitive for small and mid-sized mining operators, particularly in emerging markets where access to capital or financing options may be limited. In less-developed mining regions, older rigs remain in use, reducing productivity and increasing safety risks. Without sufficient government support or financial incentives, these barriers deter operators from modernizing their equipment, thus impacting market growth.

### Key Market Trends

#### Increasing Preference for Electrified and Hybrid Drilling Rigs

A notable trend shaping the Asia-Pacific rotary blasthole drilling rig market is the shift toward electrified and hybrid power systems. As mining companies aim to reduce their carbon footprint and comply with stricter emission standards, the adoption of electric and diesel-electric hybrid rigs is gaining momentum. Countries such as Australia

and Japan are leading this transition, supported by pilot projects and government initiatives promoting low-emission technologies. These rigs offer benefits including lower fuel consumption, reduced emissions, and lower maintenance requirements, making them appealing for environmentally conscious mining operations. Major OEMs are actively developing next-generation hybrid and electric rigs optimized for Asia-Pacific's diverse terrain and mining conditions. The increased focus on sustainability, paired with long-term cost savings, is expected to drive further adoption of electrified drilling equipment across the region.

### Key Market Players

Bauer AG

Caterpillar Inc.

Epiroc AB

Komatsu Ltd.

Liebherr Group

Nanchang Kamach Mining Co. Ltd.

Schramm Inc.

Sunward Intelligent Equipment Co. Ltd.

### Report Scope:

In this report, the Asia-Pacific Rotary Blasthole Drilling Rig Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Asia-Pacific Rotary Blasthole Drilling Rig Market, By Type:

Large-range Drilling Rig

Mid-range Drilling Rig

Others

Asia-Pacific Rotary Blasthole Drilling Rig Market, By Power:

Electric

Diesel

Hybrid

Asia-Pacific Rotary Blasthole Drilling Rig Market, By Application:

Quarries

Open-Pit Mining

Others

Asia-Pacific Rotary Blasthole Drilling Rig Market, By Country:

China

Japan

India

South Korea

Australia

Singapore

Thailand

Malaysia

Competitive Landscape

*Asia-Pacific Rotary Blasthole Drilling Rig Market By Type (Large-range Drilling Rig, Mid-range Drilling Rig, a...*

Company Profiles: Detailed analysis of the major companies present in the Asia-Pacific Rotary Blasthole Drilling Rig Market.

Available Customizations:

Asia-Pacific Rotary Blasthole Drilling Rig Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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