

Asia Pacific Smart Mining Market Forecast to 2030 - Regional Analysis - by Component (Automated Equipment, Hardware Component, Software Solution, and Services) and Mining Type (Underground Mining and Surface Mining)

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Abstracts

The Asia Pacific smart mining market was valued at US\$ 5,832.05 million in 2022 and is expected to reach US\$ 13,440.53 million by 2030; it is estimated to register a CAGR of 11.0% from 2022 to 2030.

Adoption of Automated Mining Equipment Fuels Asia Pacific Smart Mining Market

Smart mines with already installed technologies can automate their operations faster than those lagging in technological adoption. By implementing advanced technologies, mining operators can expand their current wireless network of embedded sensors. For instance, installing automation software enables the operator to monitor static and moving assets remotely and program automated interaction between both. Automated trucks carry out mining operations with the help of a physical sensor network and the remotely configured and managed software system, which previously required a truck driver fleet for service. Digitizing a mine by installing a wireless sensor network to perform remote readings can facilitate further digitization, such as automating key mining processes. Growing use of Operational Intelligence (OI) technologies, wireless monitoring and predictive maintenance support mining operators to track operational properties, to overcome the risks associated with mining and other crucial tasks. In real-time, the digital data collection process replaces the manual data collection at the operational site. The pressure of pore water plays a significant role in the dam site. The fluctuation in pore water pressure may lead to a sudden break in the dam. Instead of manual pressure measurement, operators can continuously track pore water pressure

levels with real-time digital readings, giving them better capabilities to protect their critical assets. Mining automation not only provides protection but also makes complex operations simpler. Rio Tinto and BHP Billiton set up remote operation centers in Western Australia to enhance worker productivity and achieve effective mine operations. The nation also focuses on setting up broadband networks to collect, monitor, and process data for process optimization. The system allows resource-efficient usage and promotes the effective use of water and electricity to ensure sustainability in the environment and economy.

Numerous mining and technology companies are developing automated mining equipment to improve worker safety and working conditions, increase productivity, improve fuel efficiency and vehicle utilization, reduce driver fatigue and attrition, and reduce unscheduled maintenance.

In May 2023, Komatsu Ltd. launched a series of medium-sized hydraulic excavators equipped with a hydrogen fuel cell to achieve carbon neutrality in the mining and construction workplaces. This excavator delivers powerful digging performance and high operability to mining operations.

In March 2023, Roll Hill announced the expansion of its autonomous haulage system (AHS) by partnering with Epiroc and ASI. The companies are working on converting Roy Hill's 96 conventional haul trucks into the world's first autonomous haul truck solution. The autonomous haul truck provides driverless operation and helps Roll Hill to create the world's largest autonomous mine.

In November 2020, ABB launched the ABB Ability Safety Plus for hoists, a suite of mine hoist safety. The products consist of Safety Plus Hoist Protector, Safety Plus Hoist Monitor, and Safety Plus Brake System with Safety Brake Hydraulics. ABB Ability Safety Plus is the first independently certified Safety Integrity Level 3 mine hoist system in the mining industry.

Asia Pacific Smart Mining Market Overview

Asia Pacific comprises several developed economies such as China, India, Japan, South Korea, and Australia. These countries are witnessing an increase in the middle-class population and urbanization that offers ample opportunities for key market players in the smart mining market. Asia Pacific is well-known for its technological innovations. Rapid technological developments, government support, digitalization of the economy,

and rise in disposable income of the middle-income class group are among the factors that help the economy of the countries to develop. Asia Pacific integrates the smart mining industry more quickly than other regions. For instance, Asia Pacific has one of the biggest surface mines including Bakan Gold Project(Indonesia), Gevra OC Mine(India), Sangatta Mine(India), Kusmunda OC Mine(India), Batu Hijau Mine(Indonesia), Anjialing Open Pit Mine(China), oyu Tolgoi Copper-Gold Mine(Mongolia), etc. The increasing number of mines increases the demand for the innovative technologies in mining. Therefore, the smart mining is gaining traction in the market.

Several major mining companies reside in the region. By market capitalization, nearly half of the top 40 global mining companies, such as BHP Group, Rio Tinto, China Shenhua Energy Company, and Coal India, are in or closely tied to the region. Furthermore, the most important current mining deals involve the region. All these factors are expected to contribute to the growth of the smart mining market in Asia Pacific.

Asia Pacific Smart Mining Market Revenue and Forecast to 2030 (US\$ Million)

Asia Pacific Smart Mining Market Segmentation

The Asia Pacific smart mining market is segmented based on component, mining type, and country.

Based on component, the Asia Pacific smart mining market is segmented into automated equipment, hardware component, software solution, and services. The automated equipment segment held the largest Asia Pacific smart mining market share in 2022. The automated segment is further subsegmented into load haul dump, robotic truck, driller & breaker, excavator, and other automated equipment. The hardware component is further subsegmented into RFID tags, sensors, intelligent system, and others. The software solutions are further subsegmented into logistics software and solutions, data & operation management software and solutions, safety & security systems, connectivity solutions, analytics solutions, remote management solutions, and asset management solutions.

In terms of mining type, the Asia Pacific smart mining market is bifurcated into underground mining and surface mining. The surface mining segment held a larger Asia Pacific smart mining market share in 2022.

Based on country, the Asia Pacific smart mining market is categorized into China, India, Japan, South Korea, Australia, and the Rest of Asia Pacific. China dominated the Asia Pacific smart mining market in 2022.

ABB Ltd, Alastri, Caterpillar Inc, Hexagon AB, Hitachi Ltd, MineSense, Rockwell Automation Inc, SAP SE, and Trimble Inc are some of the leading companies operating in the Asia Pacific smart mining market.

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