

Middle East & Africa Mining Chemicals Market Forecast to 2030 - Regional Analysis - by Type [Flotation Chemicals (Frothers, Flocculants, Depressants, Collectors, and Others), Solvent Extractants, Grinding Aids, and Others], Mineral Type (Base Metals, Non-Metallic Minerals, Precious Metals, and Others), and Application (Mineral Processing, Wastewater Treatment, and Others)

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Abstracts

The Middle East & Africa mining chemicals market was valued at US\$ 1,390.00 million in 2022 and is expected to reach US\$ 1,969.91 million by 2030; it is estimated to register at a CAGR of 4.5% from 2022 to 2030.

Growing Demand for Metals and Minerals in High-End Product Manufacturing Bolsters Middle East & Africa Mining Chemicals Market

The demand for metals, rare earth elements, and minerals in manufacturing high-end products is driven by advancements in the automotive, aerospace, and electronics industries. The higher demand for metals prompts increased mining activity to extract and produce the required raw materials, ultimately leading to extensive use of mining chemicals to access ore deposits, eliminate impurities, and fragment rocks. In addition, with the growing demand for metals, mining companies increasingly focus on improving safety measures and operational efficiency. This includes advancing mining explosive technologies and formulations that can optimize blasting operations. Precious metals such as gold and platinum are sought for their properties such as conductivity in the electrical & electronics industry. In the automotive industry, sports and other high-end

vehicles are manufactured using lightweight metals such as aluminum, titanium, and high-strength steel. The demand for aluminum has significantly increased in the past few years due to the rising production of lightweight materials for internal combustion engines and electric vehicles. According to the International Energy Agency, aluminum production grew strongly between 2020 and 2022, with an annual growth rate of 3%, irrespective of the COVID-19 pandemic.

Source: International Energy Agency

Minerals such as lithium and cobalt play a major role in manufacturing batteries for electric vehicles and advanced electronics. The growing demand for renewable energy technologies such as solar, wind, and electric systems is further increasing the need for metals such as copper, and other rare earth metals. Further, rising demand for lithium prompted automotive companies to explore the mining business in recent years. For instance, in May 2023, Tesla Inc announced its plan to enter the lithium mining business to meet the rising demand for lithium for the production of electric vehicles. Mining chemicals are used for ore extraction and processing, mineral processing, water treatment, dust control, environmental management, and safety operations. The growth of the high-end product manufacturing industries, such as automotive, drives the demand for metals, subsequently driving the Middle East & Africa mining chemicals market.

Middle East & Africa Mining Chemicals Market Overview

A report published by the Mineral Council of South Africa in 2022 revealed that the value of mining production in South Africa grew from US\$ 57.0 billion in 2021 to US\$ 61.0 billion in 2022. The value of total sales generated from iron ore in South Africa accounted for US\$ 5.4 billion in 2022, representing a rise of 47.3% compared to 2019. According to the International Trade Administration, Saudi Arabia's untapped mineral reserves accounted for US\$ 1.3 trillion in 2021. Further, the World Mining Data 2022 report released by the Federal Ministry Republic of Austria revealed that Africa accounted for 889.63 million metric tons of mineral production (excluding bauxite). Also, the mining production rate of minerals in Africa increased by 16.2% from 2000 to 2020.

As per the National Industrial Information Center (Saudi Arabia), the Ministry of Industry and Mineral Resources issued 71 mining licenses, including licenses for 45 exploration projects, 21 building materials quarry, and 5 small mine projects, in July 2023. The report revealed 2,348 active mining licenses in the sector by the end of July 2023. Mining of metals and nonmetals requires several mining chemicals such as floatation

agents, dust suppression chemicals, explosives, and blasting agents for various mining processes. The rise in mining production rates for minerals, metals, and nonmetals in the Middle East & Africa drives the demand for mining chemicals across the region.

Middle East & Africa Mining Chemicals Market Revenue and Forecast to 2030 (US\$ Million)

Middle East & Africa Mining Chemicals Market Segmentation

The Middle East & Africa mining chemicals market is segmented based on type, mineral type, application, and country.

In terms of type, the Middle East & Africa mining chemicals market is segmented into flotation chemicals, solvent extractants, grinding aids, and others. The flotation chemicals segment is sub-segmented into frothers, flocculants, depressants, collectors, and others. The flotation chemicals segment held the largest share in 2022.

By mineral type, the Middle East & Africa mining chemicals market is segmented into base metals, non-metallic minerals, precious metals, and others. The non-metallic minerals segment held the largest share in 2022.

In terms of application, the Middle East & Africa mining chemicals market is segmented into mineral processing, wastewater treatment, and others. The mineral processing segment held the largest share in 2022.

Based on country, the Middle East & Africa mining chemicals market is categorized into South Africa, Saudi Arabia, the UAE, and the Rest of Middle East & Africa. The Rest of Middle East & Africa dominated the Middle East & Africa mining chemicals market in 2022.

Orica Ltd, Kemira Oyj, BASF SE, Clariant AG, Dow Inc, AECI Ltd, Nouryon Chemicals Holding BV, Betachem Pty Ltd, Betachem Pty Ltd, Solvay SA, and Arkema SA are some of the leading companies operating in the Middle East & Africa mining chemicals market.

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