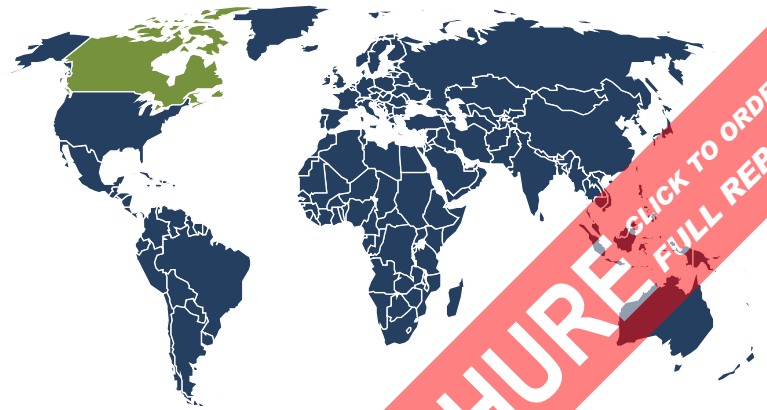




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Mining Equipment: Canada

October 2018



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About This Report

Scope

This report forecasts to 2022 mining equipment demand and shipments in nominal US dollars at the manufacturer level in Canada. Total demand is segmented by product in terms of:

- surface mining equipment
- underground mining equipment
- drills and breakers
- crushing, pulverizing, and screening equipment
- mineral processing and other equipment
- parts and attachments

Total demand is also segmented by market as follows:

- minerals mining
- metals mining
- coal mining

To illustrate historical trends, total demand is provided in annual series from 2007 to 2017; shipments and the various segments are reported at five-year intervals for 2007, 2012, and 2017.

Excluded from the scope of this report are certain products that can be used at mining sites and are sometimes considered to be mining machinery, including general purpose material handling and oilfield equipment. Also excluded is used and rebuilt mining machinery of all types.

For any given historical year, US dollar amounts are obtained from values expressed in the applicable local currency. These local currency values are converted to US dollars at the average annual exchange rate for that year. For forecast years, the US dollar amounts assume the same annual exchange rate at that prevailing in 2017. All figures cited are in US dollars unless otherwise specified.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Mining Equipment: Canada (FA75021) is based on *Global Mining Equipment*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 6 | NAICS & SIC Codes Related to Mining Equipment

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industrial Classification	
333120	Construction Machinery Mfg	3531	Construction Machinery & Equipment
333131	Mining Machinery & Equipment Mfg	3532	Mining Machinery & Equipment, Except Oil & Gas Field Machinery & Equipment

Source: US Census Bureau

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both

About This Report

top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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Resources

The Freedonia Group

Global Mining Equipment, October 2018

Freedonia Industry Studies

Global Industrial Silica Sand, August 2018

Hand Tools in the US, August 2018

Power Tools in the US, June 2018

Global Pumps Market, May 2018

Global Power Lawn & Garden Equipment, December 2017

Global Forestry Equipment, October 2017

Global Construction Machinery, August 2017

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Coal: United States

Construction Machinery: Canada

Construction: United States

Fabricated Metal Products: United States

Forestry Equipment: Canada

Industrial Silica Sand: Canada

Metal Services: United States

Mining & Quarrying: United States

Power Lawn & Garden Equipment: Canada

Power Tools: Canada

Proppants: North America

Pumps: Canada

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Trade Publications

Engineering & Mining Journal

International Mining

Mining Magazine

Mining Weekly

Pit & Quarry

Rock Products

Agencies & Associations

Association of Equipment Manufacturers

ASTM International

Canadian Institute of Mining, Metallurgy and Petroleum

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Coal Association of Canada
Copper Development Association
CSA Group
Environment Canada
Mining Association of Canada
National Mining Association
National Stone, Sand, and Gravel Association
Natural Resources Canada
Statistics Canada
United Nations Comtrade