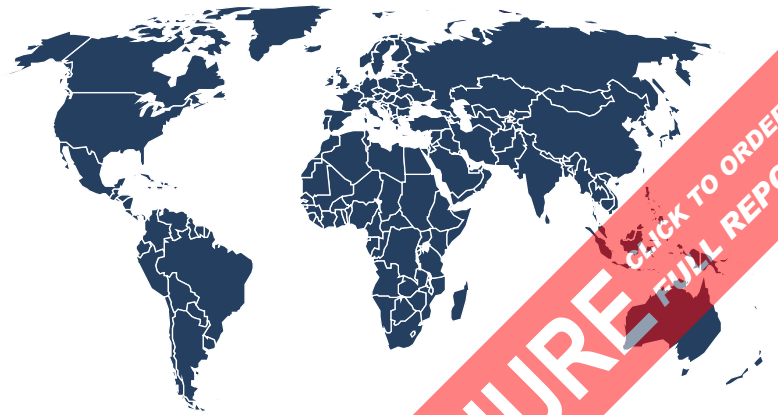


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Global Mining Equipment

October 2018



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About This Report

Scope

This report forecasts to 2022 global demand for mining equipment by product, market, and major world region in nominal US dollars at the manufacturer level. Product segments include:

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

Reported markets encompass:

- minerals mining
- metals mining
- coal mining

Major world regions include North America, Western Europe, Asia/Pacific, and all other regions.

To illustrate historical trends, world, product, market, and regional demand (including product and market segments) are provided for 2007, 2012, and 2017.

Global production is segmented by major world region and provided for 2007, 2012, 2017, and 2022.

Excluded from the scope of the 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.

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

Global Mining Equipment (FW75021) is based on 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 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 10 | NAICS & SIC Codes Related to Mining Equipment

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industrial Classification	
333120	Construction Machinery Manufacturing	3531	Construction Machinery & Equipment
333131	Mining Machinery & Equipment Manufacturing	3532	Mining Machinery and Equipment, Except Oil and Gas Field Machinery and 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 top-down and bottom-up) and then triangulate those results to come up with the most

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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 Forestry Equipment, October 2017

Global Construction Machinery, August 2017

Global Diesel Engines Market, January 2017

World Agricultural Equipment, April 2016

Freedonia Focus Reports

Construction Aggregates: United States

Construction Machinery: Canada

Construction Machinery: United States

World Construction Machinery

World Construction Aggregates

Freedonia Custom Research

Trade Publications

Engineering & Mining Journal

International Mining

Mining Magazine

Mining Weekly

Pit & Quarry

Rock Products

Agencies & Associations

Eurostat

UN Comtrade

US Census Bureau

US International Trade Commission