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World Mining Equipment

Industry Study with Forecasts for **2019 & 2024**

Study #3337 | November 2015 | \$6600 | 439 pages

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The Freedonia Group

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INDUSTRY STRUCTURE

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Growth in demand will be driven by increases in manufacturing output, especially in the developing world, stronger construction activity in much of the developed world, and an eventual upswing in commodity prices.

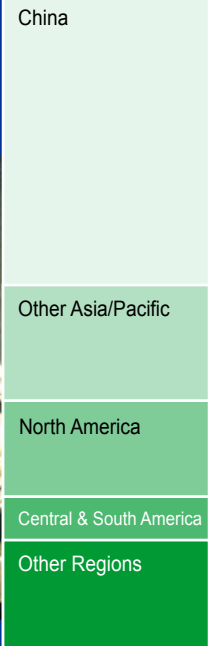
World demand to rise 7% annually through 2019

Global demand for mining equipment is forecast to expand 7.0 percent annually to nearly \$105 billion in 2019. Growth in mining equipment sales during the 2009-2014 period was erratic, a result of the volatility of commodity prices and the resultant effect on mining machinery investment. For example, in 2013 and 2014 falling commodity prices had a similar downward effect on mining equipment sales. Commodity prices are expected to be in the midst of an upswing in 2019, helping fuel mining equipment demand gains. In addition, increases in manufacturing output, especially in the developing world, and renewed strength in construction activity in much of the developed world will support mining equipment sales gains.

Developing world to remain fastest growing market

The developing world will continue to post robust gains in mining equipment demand, as overall lack of mechanization rates in these countries drive purchases. In addition, many developing countries have significant metals and coal mining industries that require substantial levels of capital investment. These include nations in the Asia/Pacific region and Central and South America, which have large metals mining industries, and in Eastern Europe and the Africa/Mideast region, which are sizable coal producing areas.

World Mining Equipment Demand, 2019 (\$104.5 billion)



India to be fastest growing national market

China is by far the largest national market for mining equipment, with sales more than doubling between 2009 and 2014. Rapid increases in manufacturing output and construction activity in the country, as well as government efforts to boost the mechanization of China's mines, led to torrid growth historically, and advances will remain above average through 2019. Although it will remain a much smaller market than China, India will record the fastest gains of any country, as there is still a significant need for mine mechanization. In addition, mining output growth in India will be among the strongest in the world.

Developed countries to experience slower growth

The developed countries of North America and Western Europe will experience more modest growth through 2019, although mining equipment demand in Western Europe will accelerate from the 2009-2014 period as the region's construction industry rebounds from a decade long decline. The majority of mining activity in these nations is of aggregates, which require less capital spending per metric ton of output than metals or coal. In addition, coal consumption and associated mining output are falling in many industrialized countries, as regulatory mandates lead to greater use of other energy sources.

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**Sample Text,
 Table & Chart**

MARKETS

China: Mining Equipment Outlook

Demand for mining equipment in China is forecast to grow at a rate of 2.5 percent annually through 2019, down from 3.5 percent in 2009-2014. This is due to the market conditions in 2013 and 2014, which were the fastest growing national markets in the world, behind Thailand. An expected deceleration in digit annual gains registered in 2015 will stem from the slower rate of growth through 2015, which will cause mining machinery sales to moderate. Additionally, the government has enacted a number of regulations to curb the consumption of coal, which will prevent faster gains in related mining equipment purchases. For instance, in November 2014 China issued the Energy Development and Conservation Action Plan, which will cap coal consumption in 2020 at 3.9 billion metric tons. The Action Plan also states that the share of coal in the energy mix will be reduced from 66 percent in 2015 to 62 percent in 2020. Furthermore, in March 2015 China's State Administration of Work Safety and the State Administration of Coal Industry announced a plan to shut down 5,000 coal mines in the country by the end of 2015.

Although metals mining accounts for a small share of total mining production in China in volume terms, the metals market comprises the largest share of mining equipment sales. This is due to the substantial amount of material that must be mined and processed to produce metals such as copper, gold, and rare earth metals in useful quantities. In addition, China's massive steel industry requires large supplies of iron and steel, which has spurred many mining companies to invest in iron ore production capacity. Through 2019, minerals and metals mining will account for the fastest gains in mining equipment sales.

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**SAMPLE
 TEXT**

TABLE VII-14

**RUSSIA: MINING EQUIPMENT SUPPLY & DEMAND
 (million dollars)**

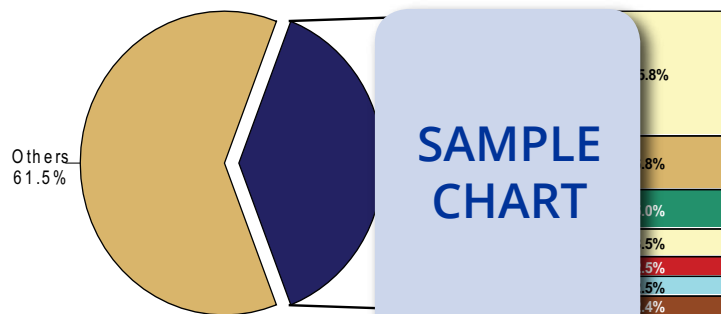
Item	2004	2009	2014	2019	2024
Gross Domestic Product (bil 2013\$)	2,000	2,000	2,000	2,000	2,000
% GFI					
Gross Fixed Investment (bil 2013\$)					
Mining Output (mil metric tons)					
\$ equipment/mil \$ GDP					
\$ equipment/000\$ GFI					
\$ equipment/m ton mining output					
Mining Equipment Demand					
Surface Mining Machinery					
Underground Mining Machinery					
Drills & Breakers					
Crushing/Pulverizing/Screening Equip:					
Stationary					
Portable					
Mineral Processing & Other Machinery					
Parts & Attachments					
net exports					
Mining Equipment Shipments					
% Russia					
Eastern Europe Mining Equipment Shpmts					

**SAMPLE
 TABLE**

Source: The Freedonia Group, Inc.

CHART VIII-1

**WORLD MINING EQUIPMENT MARKET SHARE
 (\$74.5 billion, 2014)**



**SAMPLE
 CHART**

Sample Profile & Table, & Study Coverage

COMPANY PROFILES

Refacciones Neumáticas La Paz SA de CV

Parque Industrial
 Manzana C, L
 Matchuala, S
 Mexico
 52-488-882-0
 www.rnpsa.co

SAMPLE PROFILE

Annual Sales:
 Employment:
 Key Products: pneumatic & hydraulic drill rigs, & related spare parts

Refacciones Neumáticas La Paz (RNPSA) is a leading producer of pneumatic and hydraulic drill rigs and related parts for rock drilling applications. The Company is privately held.

The Company participates in the worldwide mining equipment industry through the manufacture of pneumatic and hydraulic drill rigs and related parts. These products, which are available under the THUNDER ROCK brand name, can be utilized in mining and other industries. Among RNPSA's pneumatic drill rigs are RN-250S and RB83FX stoper, and RN-250X and RN-S83FX jackleg models, while the Company's hydraulic drill rigs comprise the RN-0338, RN-0238, and RN-300 units. The Company also makes spare parts for its drill rigs, including cylinders, pistons, valves, and covers.

RNPSA conducts manufacturing activities primarily at a site in Matchuala, Mexico. Additionally, the Company operates sales offices in Mexico, Peru, and Bolivia. Moreover, RNPSA's products are sold in more than 15 countries, including the US, Canada, Colombia, Chile, Argentina, Nicaragua, and France. RNPSA's products are marketed via a network of distributors in the Americas, Europe, and Africa.

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TABLE V-4

GERMANY: MINING EQUIPMENT DEMAND BY MARKET (million dollars)

Item	2004	2009	2014	2019	2024
Mining Output (mil metric tons)					
\$ equipment/m ton output					
Mining Equipment Demand					
Metals Mining:					
Iron Ore					
Other					
Minerals Mining:					
Aggregates					
Phosphate Rock & Potash					
Other					
Coal Mining:					
Bituminous & Sub-Bituminous					
Anthracite & Other					
% Germany					
Western Europe Mining Equip Demand					

SAMPLE TABLE

Source: The Freedonia Group, Inc.

STUDY COVERAGE

World Mining Equipment is a Freedonia study that presents historical data (2004, 2009, 2014) plus forecasts (2019, 2024) for supply and demand, as well as demand by market, in 6 regions and 27 major countries. This study also considers key market environment factors, details the industry structure, evaluates company market share and profiles 40 global industry players.

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Related Studies

World Elevators

Global demand for elevator equipment and services is forecast to grow 5.9 percent annually to \$121 billion in 2019. Growth in the leading Chinese market will slow but still rise 10 percent annually. The emphasis on space and energy saving technologies such as machine room-less (MRL) elevators will continue to increase. This study analyzes the \$91 billion world elevator industry, with forecasts for 2019 and 2024 by product and service for six world regions and 20 major countries. The study also evaluates company market share and profiles industry players.

#3324..... October 2015.....\$6300

World Construction Machinery

World demand for construction machinery is forecast to advance 3.9 percent annually through 2019 to \$218 billion. China will be the fastest growing national market and surpass the US as the largest. Demand for excavators and loaders will advance at the fastest pace, fueled by rising construction and surface mining activity. This study analyzes the \$180 billion world construction machinery industry, with forecasts for 2019 and 2024 by product for six world regions and 23 major countries. The study also evaluates company market share and profiles industry participants.

#3282..... June 2015.....\$6500

World Forestry Equipment

World demand for forestry equipment will climb 4.5 percent annually to \$9.3 billion in 2019. Harvesters and forwarders will be the fastest growing types, supported by increased use of cut-to-length harvesting methods. The US will record the largest increases in dollar terms, while Brazil will register larger increases in percentage terms. This study analyzes the \$7.4 billion world forestry equipment industry, with forecasts for 2019 and 2024 by type for six world regions and 14 major countries. The study also evaluates company market share and profiles industry participants.

#3270..... June 2015.....\$6300

World Material Handling Products

Global material handling product demand will rise 5.0 percent annually through 2018 to \$142 billion. India and China will grow the fastest as material handling products supply growing manufacturing and distribution activity. Automated storage and retrieval systems and automated guided vehicles will grow the fastest. This study analyzes the \$111 billion world material handling product industry, with forecasts for 2018 and 2023 by product, market, world region, and for 29 countries. This study also evaluates company market share and profiles industry participants.

#3196..... September 2014.....\$6400

World Agricultural Equipment

Global demand for agricultural equipment will rise 6.9 percent yearly through 2018 to \$208 billion. China will be the fastest growing market, followed by Turkey, Brazil, Thailand, India and South Africa. Tractors will remain the largest equipment segment, while harvesting machinery will exhibit the most rapid growth in demand. This study analyzes the \$149 billion world agricultural equipment industry, with forecasts for 2018 and 2023 by type, world region, and for 28 countries. The study also evaluates company market share and profiles industry players.

#3166..... July 2014.....\$6300

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States and other world markets. Industries analyzed by Freedonia include:

- Automotive & Transport • Chemicals • Construction & Building Products • Consumer Goods • Energy & Petroleum • Industrial Components • Healthcare & Life Sciences • Machinery & Equipment • Metals, Minerals & Glass • Packaging • Plastics & Other Polymers • Security • Services • Textiles & Nonwovens • Water Treatment

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Freedonia Custom Research

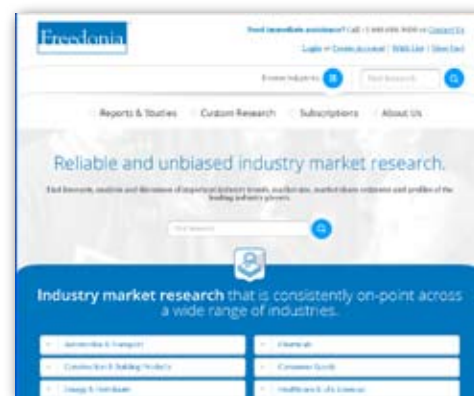
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