

The Connected Mining Solutions Market

The Connected Mining Solutions Market is a comprehensive report from Berg Insight analysing the latest developments on the market for connected solutions used in the mining sector.

This strategic research report from Berg Insight provides you with 180 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

Highlights from this report:

- ◆ **Insights** from numerous interviews with market-leading companies.
- ◆ **Perspectives** on the impact of emerging technologies.
- ◆ **Profiles** of key players offering connected mining solutions.
- ◆ **Overview** of the connected mining value chain and key applications.
- ◆ **Summary** of the latest industry trends and developments.
- ◆ **Forecasts** of connected mining solutions lasting until 2023.

Berg Insight forecasts connected mining solutions will reach 1.2 million units in 2023

Berg Insight estimates that the total installed base of connected mining solutions reached almost 0.6 million units in use worldwide across the equipment, people and environment segments in 2018. The equipment segment accounts for the largest share of the total, representing connected devices deployed on machines and vehicles used in mining operations. This includes solutions ranging from OEM telematics systems on mining equipment to advanced connected solutions supplied by mining technology specialists. The people segment consists of various solutions deployed to support the safety and productivity of mining personnel, while the environment segment includes sensor technology implemented for environmental monitoring of the mine itself. Growing at a compound annual growth rate of 15.5 percent, the installed base of connected mining solutions across all segments is forecasted to reach close to 1.2 million units in 2023. Asia-Pacific is estimated to account for the largest share of the total installed base, followed by North America, the Middle East & Africa, Latin America and Europe.

The top players active in the connected mining space include strikingly different types of companies, ranging from specialised independent technology suppliers of varying sizes up to the leading

mining equipment manufacturers. Many of the key players today serve both surface and underground mining customers. The surface segment is dominated by Modular Mining Systems (owned by Komatsu), Hexagon Mining, Wenco International Mining Systems (owned by Hitachi Construction Machinery) and Caterpillar through its Cat MineStar suite. Modular, Hexagon and Caterpillar all serve underground customers in addition to a primary presence in the surface segment, while Wenco is fully focused on surface mining. VIST Group is also a player in the surface segment and serves some underground operations as well. Examples of key technology providers focused specifically on underground applications are Newtrax Technologies (recently acquired by Sandvik) and Mobilaris (partially owned by Epiroc). The underground segment is in general less mature and more fragmented. Mine Site Technologies, MICROMINE and rapidBizApps are additional strong players in the underground segment that all also serve surface customers to varying extents.



Berg Insight's M2M Research Series

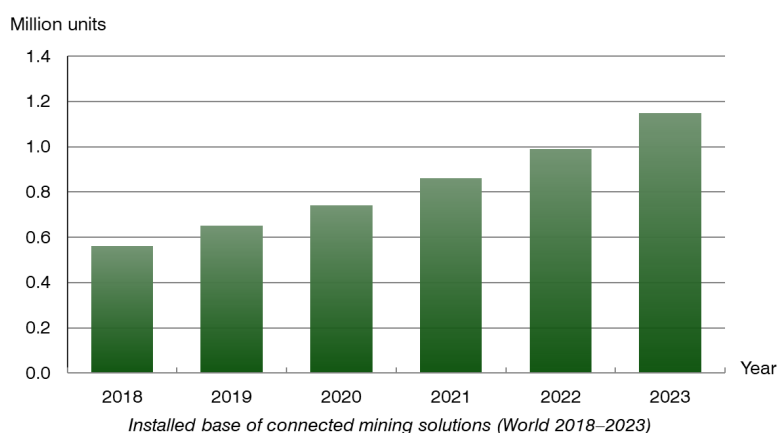
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This report answers the following questions:

- ◆ What types of techniques are used in surface and underground mining respectively?
- ◆ Which are the major types of mining equipment?
- ◆ Which are the main connected mining applications and concepts?
- ◆ How will the installed base develop in the coming years?
- ◆ Which are the key providers of connected mining solutions?
- ◆ What offerings are available from equipment OEMs?
- ◆ What other types of players are involved in the connected mining value chain?
- ◆ Which are the major trends and drivers affecting the market?
- ◆ How will the market for connected mining solutions evolve in the future?



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