



AUSTRALIA

# Global Mining Equipment, Technology and Services (METS) Market Briefings

Key Takeaways Report



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Through Austrade's tailored trade services, targeted trade missions and extensive involvement in the world's largest mining shows, Austrade has achieved decades of success in supporting the expansion of Australian METS into the global METS sector.

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Austmine is the leading industry association for Australia's Mining Equipment, Technology and Services (METS) sector.

As the voice of Australia's METS industry, Austmine drives the global advancement of mining innovation and supports its members to grow, collaborate and compete internationally.

Austmine's membership spans the full mining value chain - from multinational engineering and technology firms to agile start-ups, SMEs, researchers and service providers - reflecting the depth and diversity of Australia's mining innovation ecosystem.

Austmine works across industry and with government to expand international opportunities, strengthen Australia's reputation for mining excellence, and connect local innovation with global markets.

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**Acknowledgement of country**

In the spirit of reconciliation, we acknowledge the Traditional Custodians of country throughout Australia and their connections to land, sea and community. We pay our respect to their elders past and present and extend that respect to all Aboriginal and Torres Strait Islander peoples today.

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## Overview

The Global METS Market Briefing series was delivered at the International Mining and Resources Conference (IMARC) in Sydney in October 2025, providing Australian Mining Equipment, Technology and Services (METS) companies with direct insight into emerging international opportunities. Designed to strengthen global engagement and inform export strategies, the series examined four priority regions for Australian METS - Latin America (specifically Peru and Brazil), Saudi Arabia, Mongolia, and Southeast Asia (specifically Indonesia and the Philippines) - through the lens of mineral investment outlook, sector development priorities and demand for innovation.

Each briefing featured mining executives, experienced exporters and Austrade's global leaders who shared practical perspectives on mining industry needs, alignment of Australian capabilities, and potential risks and challenges to export growth. The discussions revealed strong global demand for technologies and services that can support enhanced efficiencies, reduced costs and improved sustainability outcomes across the mining value chain, and underscored the importance of trusted, long-term partnerships in achieving commercial success.

Despite the unique regulatory and operational conditions explored in each market briefing, common themes emerged to achieve sustainable international business growth - local partnerships, long-term investment, cultural understanding and measurable value creation for customers. These insights delivered a practical pathway forward for Australian METS companies to develop global supply chains and position themselves as partners of choice in supporting mining industry development.

The following report consolidates the key takeaways from each regional session, outlining major growth areas, market considerations and practical strategies for successful market entry. It serves as both a record of discussion and a reference point for Australian METS companies expanding into new and evolving markets.

## Acknowledgements

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- **Carlos Castro**, Corporate Affairs Manager South America – Glencore & President – Australia Peru Chamber of Commerce & Industry (APCCI)
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- **Abed Hakmi**, Senior Business Development Manager, Austrade Saudi Arabia
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# Regional Overview

Region	Key Growth Drivers	Primary METS Opportunities	Strategic Alignment with Australia
<b>Latin America (Peru &amp; Brazil)</b>	Expansion of copper assets and critical minerals investment to meet energy transition demands	<ul style="list-style-type: none"> <li>Leveraging digital technologies and technical expertise to reduce cost, drive efficiencies and remove operational bottlenecks</li> <li>Sustainability solutions focusing on community engagement, water and tailings management</li> </ul>	<ul style="list-style-type: none"> <li>Established mining relationships and investment from global majors</li> <li>Mature markets with an appetite for innovation and sustainable technologies</li> </ul>
<b>Middle East (Saudi Arabia)</b>	Vision 2030 diversification strategy powering mineral exploration and downstream industrialisation	<ul style="list-style-type: none"> <li>Exploration services and digital technologies to fast-track new projects</li> <li>Development of core competencies and skills</li> <li>Minerals processing capabilities and efficiencies</li> </ul>	<ul style="list-style-type: none"> <li>Capabilities designed to support leading-edge mineral and industrial development</li> <li>Increased FDI driving sustainability, transparency and supply chain opportunities</li> </ul>
<b>Central Asia (Mongolia)</b>	Infrastructure expansion, modernised mining laws and sustainability initiatives driving sector development	<ul style="list-style-type: none"> <li>Utilising automation and digital technologies to combat harsh environment</li> <li>Expertise to manage water scarcity and tailings</li> <li>Workforce training across mining competencies</li> </ul>	<ul style="list-style-type: none"> <li>Knowledge and technology transfer to develop operational excellence</li> <li>Shared objectives to promote safety and sustainability</li> </ul>
<b>Southeast Asia (Indonesia &amp; The Philippines)</b>	Mining industry reforms and investment creating Southeast Asia hub for critical minerals and clean energy technologies	<ul style="list-style-type: none"> <li>Downstream processing, refining and smelting capabilities</li> <li>Enhancing Environmental, Social, and Governance (ESG) credentials and sustainability outcomes</li> <li>Workforce training and development of industry best practices</li> </ul>	<ul style="list-style-type: none"> <li>Regional alignment with sustainable development and industrial modernisation</li> <li>Opportunity to build on established education and training partnerships</li> </ul>





*“This is a perfect moment for Australian companies to engage – the region is open to innovation and collaboration, particularly around sustainability and productivity.”*

**Carlos Castro,**  
Corporate Affairs Manager,  
South America, Glencore

Bom Jardim da Serra,  
Brazil

## Latin America: Peru and Brazil

Latin America remains one of the most dynamic mining regions globally, underpinned by strong government support, major greenfield and brownfield investments, and rising demand for technologies that enhance safety, sustainability, and productivity.

### Key Opportunity Areas

- Energy transition & net zero: electrification, renewables, efficiency
- Mine closure & rehabilitation: land, water, monitoring
- Safety & risk management: tailings, geotechnics, wearables
- Automation & digital mining: remote ops, AI, data
- Exploration technologies: drones, geophysics, permitting

## Brazil

Brazil's mining sector combines scale, resilience, and long-term growth potential. Contributing approximately 5% of GDP and 25% of total exports, the sector plays a critical role in supporting global supply chains. Brazil's vast mineral diversity underpins a mining industry led by iron ore, gold, and copper, which together represent over 70% of total output.

### Key trends include

- Rising demand for copper and critical minerals to support the global energy transition and electrification.
- Strong appetite for digital, automation and ESG-driven solutions.
- A strong project pipeline, exceeding US\$70bn in Brazil over the next five years and US\$64bn in Peru over the next decade.
- Increasing focus on long-term partnerships with Australian METS providers offering proven technologies, local engagement, and lifecycle support.

### Market Dynamics

- Brazil's large, geographically dispersed mining operations require high-performance logistics, automation, remote operations, and efficiency-driven technologies.
- Mining companies are prioritising low-emissions operations, energy optimisation, water management, and tailings integrity, driving demand for sustainable METS solutions.
- Adoption of digital platforms, automation, and data-driven decision-making is increasing to enhance safety, productivity, and cost control throughout the mine lifecycle.
- Market entry favours Australian METS providers with proven technical performance, strong local partnerships, and a long-term commitment to the Brazilian market.

*“Brazil is truly a mining powerhouse. Like Australia, it's a country where innovation is driving growth, and companies are investing heavily to improve efficiency, safety and sustainability.”*

**Ana Bonamin,** Business Development Director, Austrade Brazil

# Peru

Mining accounts for more than 10% of Peru’s GDP, 60% of exports, and 20% of private investment, cementing its role as the country’s most important economic contributor. The next decade will see over US\$64 billion in development projects, largely driven by copper and gold.

The Peruvian mining industry is home to both large multinationals and family-owned operators, creating opportunities across both high-value and niche technical segments.

## Key Opportunity Areas

- Predictive maintenance, real-time monitoring and digital twin technologies.
- Water and tailings management, environmental monitoring and ESG compliance.
- Safety training, automation and operational efficiency systems.
- AI-enabled decision support and productivity solutions.

## Market Dynamics:

- Most operations are in remote, high-altitude regions, requiring specialised technology and logistics solutions.
- Community engagement and social license are critical — companies must demonstrate shared value and local development impact.
- Decision-making is highly technical and relationship-based, favouring suppliers with proven track records and consistent local presence.

*“Success in Peru takes patience and persistence. Building trust and genuine relationships is essential - that’s how you achieve sustainable outcomes and long-term growth.”*

**Valeria Beck**, Business Development Director, Austrade Peru

## Regional Insights

Across both Brazil and Peru, several consistent themes emerged:

Theme	Insight
<b>Sustainability</b>	Decarbonisation, water efficiency and responsible tailings management are top priorities for miners.
<b>Digital Transformation</b>	AI, automation and data analytics are being actively deployed to enhance productivity.
<b>Localisation</b>	Partnerships with local service providers and agents remain the fastest path to market.
<b>Relationship-Driven Business</b>	Trust, personal engagement and cultural understanding underpin long-term success.
<b>Australian Advantage</b>	Australia’s reputation for safety, ESG excellence and advanced technology positions METS companies strongly.

*“You need to be adaptable in Latin America. Find the right partners, understand how the market works, and take the time to build credibility. That’s how you achieve real, lasting success.”*

**Nigel Grigg**, General Manager, Global Sales and Solutions, Gekko Systems



AlUla,  
Saudi Arabia



*“This is a long-term play – a chance to help build the foundations for a stronger, more connected global mining industry.”*

**Jane Caforio,**  
National Co-Lead, Resources, Energy,  
Infrastructure & the Green Economy,  
WA State Director,  
Austrade

## Saudi Arabia

### Market Overview

The Kingdom of Saudi Arabia’s mining sector is entering a transformative phase as part of the Kingdom’s Vision 2030 agenda to diversify its economy. With over 48 identified minerals and an estimated US \$2.5 trillion in untapped resources, the government views mining as its “third pillar of the economy” after energy and petrochemicals.

The Ministry of Industry and Mineral Resources is leading an ambitious reform program to attract international partners, enhance transparency, and strengthen downstream processing capacity. Infrastructure development, renewable power integration, and local supply chain creation are key national priorities that align directly with Australia’s strengths in mining innovation and technology.

### Opportunities for METS

The Kingdom’s mining vision extends beyond extraction. It seeks to create a full value chain that includes exploration, processing, and manufacturing. This presents opportunities for Australian companies that can provide the technology and expertise to underpin efficient, safe and sustainable growth.

Focus Area	Opportunity for Australian Expertise
<b>Exploration &amp; Geoscience</b>	Advanced sensing, mapping and data analysis to support new discoveries.
<b>Sustainability &amp; ESG</b>	Tailings re-use, water efficiency, and renewable-integration technologies.
<b>Automation &amp; Digitalisation</b>	Remote operations, predictive maintenance and digital twin solutions.
<b>Downstream Processing</b>	Engineering and plant optimisation to enable value-added mineral production.
<b>Skills Development</b>	Training programs in operational excellence, safety and leadership.

Australian METS businesses that can embed innovation and knowledge transfer into their offering will find receptive partners in Saudi Arabia’s government-backed initiatives.

*“The Kingdom wants partners who can help build capability - not just deliver equipment. We are creating an environment where knowledge transfer, innovation and skills development are at the core of investment.”*

**Ahmed Alaqeel,** General Manager, Exploration Development,  
Ministry of Industry and Mineral Resources of Saudi Arabia

## Market Considerations

The business environment in Saudi Arabia is highly regulated but increasingly open to international collaboration. The 2021 Mining Investment Law introduced competitive licensing, improved tenure security and streamlined approval processes. However, local content and Saudisation requirements remain central to market entry.

Cultural understanding and long-term relationship building are vital. Decision-making is deliberate, and successful partnerships are founded on trust, visibility and sustained engagement. Participation in flagship events such as the Future Minerals Forum (FMF) is a strong avenue to establish credibility and connect with both government and private stakeholders.

*“Saudi Arabia is positioning itself as a global mining hub - one that values transparency, sustainability and long-term partnerships. For Australian METS, this is a market that rewards presence and genuine collaboration.”*

**Abed Hakmi**, Senior Business Development Manager,  
Austrade Saudi Arabia

## Future Outlook

Saudi Arabia is redefining its global role in mining by connecting Africa, Asia and Europe through integrated supply chains and sustainable mineral production. The country’s investment in infrastructure — including new rail, ports and industrial zones — is designed to attract global operators and establish the Kingdom as a mining services hub.

For Australian METS companies, the opportunity lies in delivering solutions that blend technological excellence with local value creation. By investing in partnerships, training and capability-building, Australian exporters can play a pivotal role in shaping the Middle East’s mining transformation.



*“Australian companies already have the trust and technical reputation to contribute to Saudi Arabia’s mining transformation. The key is being present, patient and genuinely engaged with local priorities.”*

**Greg Jackson**, Managing Director  
International, Byrnecut

*“Mongolia’s mining industry continues to grow, but the focus now is on efficiency, transparency and sustainability. Companies are looking for partners who can bring technology and capability, not just products.”*

**Solongo Dashdendev,**  
Senior Business Development Manager,  
Austrade Mongolia

Bayan-Ölgii,  
Mongolia

# Mongolia

## Market Considerations

Mongolia’s geography and climate pose practical challenges but also create opportunities for those who demonstrate commitment and adaptability. Mining operations are often located in remote, high-altitude environments where reliability and ongoing support matter as much as technology.

The country’s strategic location between China and Russia also influences procurement dynamics – supply chains can be complex, and strong in-market partnerships are essential.

Regulatory processes can be lengthy, and collaboration with state-owned enterprises or joint ventures often requires patience and relationship-building. However, once trust is established, partnerships tend to be enduring.

## Future Outlook

Mongolia’s government is working to balance economic growth with environmental responsibility and local benefit. The future of its mining sector will depend on efficiency, transparency and global collaboration – areas where Australian capability aligns naturally.

As the country accelerates projects in critical minerals, renewable power integration and transport infrastructure, demand will grow for technology providers who can deliver not only productivity, but also sustainability and community outcomes.



## Market Overview

Mongolia's mining industry continues to underpin its economy, accounting for roughly 25% of GDP and over 80% of exports. Copper, coal and gold dominate production, with the Oyu Tolgoi project alone representing one of the world's largest copper-gold deposits.

The government's priority is to leverage this resource base to attract foreign investment, improve infrastructure and logistics and enhance the sector's environmental and operational performance. The country's Geology and Mining Law reforms (2023–2024) aim to create a more transparent and investment-friendly framework for exploration and downstream value addition.

*“The opportunity in Mongolia is not about discovering new resources — it’s about developing them better. We need advanced processing, energy efficiency, and strong governance to compete globally.”*

**Gan-Ochir Zunduisuren**, Managing Director, Asian Battery Metals PLC

## Opportunities for METS

Focus Area	Opportunity for Australian Expertise
<b>Operational Efficiency</b>	Automation, predictive maintenance, and fleet optimisation for remote or extreme climates.
<b>Safety and Workforce Development</b>	Training systems, digital simulation, and safety management frameworks for open-pit and underground mines.
<b>Processing and Tailings</b>	Advanced ore-processing technologies, water recycling, and tailings rehabilitation.
<b>Infrastructure and Energy</b>	Engineering solutions for renewable integration and logistics expansion across the region.

The government's focus on diversifying its energy mix — including renewable power integration for mines — aligns well with Australia's clean energy capability. Meanwhile, expansion of transport corridors continues to open opportunities for integrated logistics and export services.



*“Safety, training and maintenance are big opportunities for Australian companies. Mines here are modernising quickly, and they need equipment support and technical expertise to operate efficiently.”*

**Lucinda Talbot**,  
Regional Sales Manager, APAC/EME,  
Russell Mineral Equipment



*“Indonesia is moving rapidly into downstream processing and industrialisation. Australian companies have a real advantage if they can show commitment to local partnerships and capability-building.”*

**Hanifan Tarmizi,**  
Senior Investment Director,  
Austrade Indonesia

Kendari,  
Indonesia

## Indonesia & the Philippines

### Market Overview

Southeast Asia is rapidly emerging as a focal point for global mining investment, underpinned by the drive toward decarbonisation, electrification and downstream processing. Indonesia and the Philippines are leading this shift, with ambitious policy frameworks that seek to maximise the value of their mineral endowment and attract technology-enabled partners.

For Australian METS companies, the region represents a powerful combination of growth, policy alignment and cultural compatibility. Both markets are seeking not just equipment or solutions, but trusted long-term partners who can help them operate more efficiently, sustainably and safely.

## Indonesia

Indonesia’s mining sector sits at the centre of its national development strategy. The country’s downstream-processing policy — which restricts unprocessed mineral exports and mandates domestic value addition — has triggered a surge of investment across nickel, cobalt and bauxite projects. In 2024, more than US \$30 billion was invested in new smelters and EV-battery supply chains, positioning Indonesia as the largest nickel processor in the world.

This industrial momentum is now giving rise to a second wave of opportunity, particularly around efficiency and decarbonisation, with some associated workforce capability needs.

### Opportunities for METS

Focus Area	Opportunity for Australian Expertise
<b>Process Optimisation</b>	Advanced control systems, data analytics and energy-efficient smelting technology.
<b>Sustainability and Tailings</b>	Tailings reuse, water recycling and low-emission waste management solutions.
<b>Digital Integration</b>	Automation, predictive maintenance and remote-monitoring platforms.
<b>Skills Development</b>	This is a long-term play – a chance to help build the foundations for a stronger, more connected global mining industry.

Indonesia’s policy landscape is evolving quickly, requiring exporters to stay engaged and adaptable. Local partnerships remain essential — both to satisfy localisation rules and to build credibility with regulators and state-owned operators.

*“Indonesia is not just looking for investors, we are looking for partners who can bring technology, expertise and training. Collaboration is key to achieving our long-term mining goals.”*

**Budi Santoso,** Director of Mineral Resources Processing Planning, MIND.ID

# The Philippines

After years of regulatory uncertainty, the Philippines is rebuilding its mining sector on the foundations of transparency, environmental accountability and community engagement. The lifting of the moratorium on new projects has reinvigorated exploration and investment, with strong momentum in copper, nickel and gold.

Mining contributes just over 1% of national GDP, but analysts expect this to triple within a decade as reforms take hold. The government is actively positioning the sector as a model for responsible resource development — one that aligns growth with local benefits and environmental stewardship.

## Opportunities for METS

Focus Area	Opportunity for Australian Expertise
Mine Rehabilitation	Closure planning, tailings management and land restoration.
Water Management	Real-time monitoring, recycling and treatment solutions.
Digital Transformation	Remote-operation systems, safety analytics and workforce-training technology.
Community Partnership Models	ESG advisory and transparent reporting systems.

While the investment environment has improved, operational risk remains tied to local governance. Provincial authorities play a decisive role in project approvals and oversight, making relationship management and trust-building vital to success.

*“The demand for modern equipment and process optimisation is growing fast across the region. Australian METS have the credibility and innovation that Southeast Asia needs to improve safety and efficiency.”*

**Richard Williams**, Regional Manager, McLanahan

## Strategic Fit for Australian METS

Both Indonesia and the Philippines reflect the broader shift in global mining — from volume extraction to value creation, decarbonisation and local empowerment. These markets are seeking partners who can combine technological capability with a genuine commitment to skills transfer and sustainability outcomes.

Australian companies bring a strong reputation for safety, innovation and ESG leadership, aligning perfectly with regional priorities. Those willing to invest time in relationships, localisation and capacity-building are well-placed to secure enduring opportunities in Southeast Asia.



*“Southeast Asia’s mining future will be shaped by partnership - where local collaboration, technical innovation and shared responsibility define long-term success.”*

**Mika Aure**,  
Business Development Manager,  
Austrade The Philippines



*“The next phase of global mining will be defined by collaboration — and Australia is already part of that story.”*

**Dan Boyer,**  
Deputy CEO, Trade and Investment,  
Austrade



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## Global Outlook for Australian METS

The Global METS Market Briefings highlighted clear alignment between industry development priorities and core strengths of the Australian METS sector. Across every market, miners and governments are seeking practical, proven solutions that advance efficiency, sustainability and workforce capability.

For Australian METS, the opportunity is not about scale — it’s about fit. Companies that invest time in relationships, local partnerships, and capacity-building will be best placed to convert opportunities into sustainable business.

As global mining systems evolve, the value of Australian expertise will come from collaboration, adaptability and credibility. Austrade and Austmine’s international programs will continue to connect companies with these markets, ensuring Australian innovation remains integral to the world’s transition to cleaner, smarter mining.



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