



Australian METS Opportunities in the Middle East, North Africa and Türkiye

Saudi Arabia | United Arab Emirates | Morocco | Egypt | Türkiye



Australian Government

Australian Trade and Investment Commission



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About this report

This report has been prepared by Austmine, with support from the Australian Trade and Investment Commission, to assist Australian Mining Equipment, Technology and Services (METS) companies to assess emerging opportunities in Saudi Arabia, the United Arab Emirates, Morocco, Egypt and Türkiye.

It examines the development of the mining and minerals sectors in each market, the operational needs of priority customers, areas of alignment with Australian METS capabilities, and commercial considerations that may influence opportunity access and delivery.

The report forms part of a broader program designed to help Australian METS companies identify, prepare for, connect with and advance opportunities in new international markets.

Austmine acknowledges the Australian METS companies, mining and industrial organisations, government representatives, industry specialists and market advisers that contributed to the research.

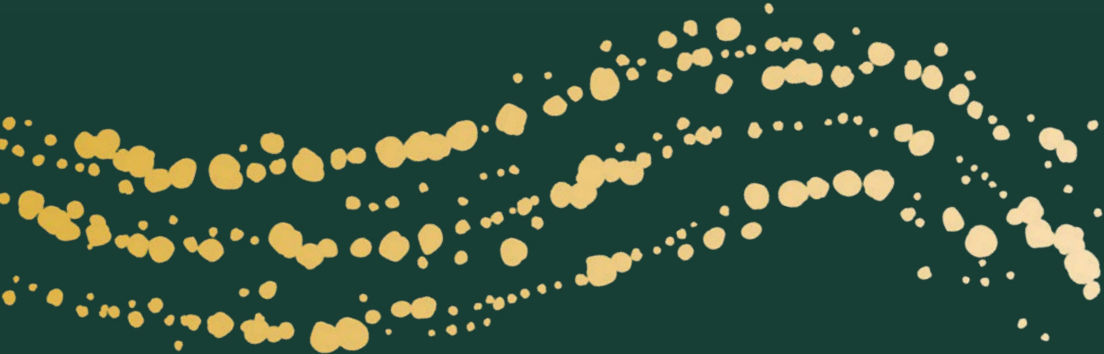
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Austmine is the leading industry association for Australia's Mining Equipment, Technology and Services (METS) sector. It connects Australian suppliers with mining companies, government and international markets through industry intelligence, export-development programs, events and commercial networks.



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Disclaimer

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While reasonable care has been taken in the preparation of this report, Austmine and the Australian Government do not guarantee that the information is complete, current or suitable for a particular business or transaction.

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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Executive summary

Five distinct markets offering substantial growth opportunities for Australian METS

Saudi Arabia, the United Arab Emirates (UAE), Morocco, Türkiye and Egypt are evolving markets for Australian METS businesses. Mineral resources, economic diversification and changes to supply chains are supporting investment in exploration, mining projects and downstream processing.

However, the five markets differ substantially in mining characteristics, technological maturity, investment activity and commercial accessibility, and should be approached as a portfolio of five distinct opportunities rather than with a single regional strategy.

This report considers current mining activity and the development outlook over the next five to ten years. Mineral endowment and announced investments analysed in this report signal market potential, but METS companies need to distinguish between funded and operating projects, which represent immediate commercial prospects, and projects still awaiting studies, approvals or financing.

Saudi Arabia

Saudi Arabia offers the broadest combination of operating demand, exploration and proposed development in the region. Maaden has outlined a US\$110 billion investment ambition across gold, phosphate, aluminium and other activities, and the government’s Vision 2030 strategy has created frameworks to unlock an estimated US\$2.5 trillion in mineral resources.^{[1][2]} Capturing this opportunity increasingly requires an in-Kingdom presence rather than a regional footprint alone, to align with procurement qualification, local content requirements and service expectations.

The United Arab Emirates

The United Arab Emirates features industrial customers in aluminium, steel and quarrying, but primarily serves as a regional hub for logistics, trade and investment. Major ports support bulk materials handling, warehousing and re-export to customers across the Middle East, Africa and South Asia. The case for a UAE base depends on where procurement authority sits and whether repeat work supports local stock, staff and service. Establishing a presence in the UAE improves connectivity and oversight but carries significant setup and operating costs, and may not remove the need for local partners, content and delivery arrangements in operating countries. ^{[3][4][5]}

Morocco

Morocco presents an emerging opportunity anchored by OCP Group’s US\$13 billion 2023–2027 investment program, which is reshaping the country’s phosphate and fertiliser industry.^{[6][7]} Government-led diversification strategies are making a tangible impact on base and precious metals investment with increased activity from Managem, Aya Gold & Silver, and several Canadian-listed juniors. Routes to market are often linked to OCP’s business units or its established contractor network, and suppliers should expect a highly competitive, European-facing business culture that values established relationships.

Egypt

Egypt is developing its mining sector through regulatory changes, incentives and a national airborne mineral survey.^[13] The Sukari gold mine and funded exploration programs provide current opportunities for Australian METS. The test for prospects is whether licences and announced projects convert into financed work programs and development decisions.^{[8][9]}

Türkiye

Türkiye is an established and competitive mining and industrial market, supported by a mature domestic supplier base spanning its boron industry, gold and other metals.^{[10][11][12]} Opportunities are increasingly focused on upgrading and sustaining ageing infrastructure and maximising value from existing assets. METS companies must demonstrate a clear technical or commercial advantage to compete effectively against Turkish, Chinese and European providers.

These country-level findings are reinforced by Austmine’s member survey of 29 companies pursuing opportunities in the region. Saudi Arabia was the most frequently cited priority market for the next one to three years (37.9%), followed by Türkiye (24.1%) and the UAE (20.7%).

However, offering a relevant, technically superior solution is not enough to capture success across the region. The barriers to entry and complexities are significant, and the survey identifies that while 79% of respondents are already exporting internationally, finding the right customer or decision-maker (66%) and local partner requirements (59%) are limitations for Australian METS.

For companies considering these markets, the first step is to identify requirements that match their capability, establish who specifies and purchases these solutions, and assess what local supply and service capability the opportunity demands. Site discussions, relevant operating references and trials can then help test demand before committing to staff, inventory or a local entity.

Austmine and Austrade can support Australian METS companies in establishing demand for their solution through market intelligence, trade programs and coordinated engagement before a significant investment decision is made on pursuing new markets.

“Trade diversification is becoming a strategic imperative for Australian METS exporters. The Middle East, North Africa and Türkiye are investing heavily in mining development and economic transformation, creating new opportunities for Australian companies to supply world-leading mining technologies, services and operational expertise.”

- Susan Kahwati, Head of Resources, Energy, Infrastructure and the Green Economy, Austrade

Market snapshot for METS

Market	Opportunity profile	Commercial opportunity	Capability Alignment	Key commercial considerations
Saudi Arabia	Primary mining and exploration growth market over immediate and long-term.	Maaden operations and expansion portfolio across mining, processing and downstream industries.	Exploration technology, drilling services, data acquisition and analysis.	Increasing local content, capability and service requirements.
		Exploration activity driven by Maaden and increasing foreign investment.	Engineering & construction, mine design, process modelling, water and waste. Skills transfer, training and automation.	Access to Maaden procurement pathways, contractors and business units.
United Arab Emirates	Domestic industrial minerals, metals processing and potential regional service base.	Aluminium, steel, quarrying and select downstream refining and smelting.	Process optimisation, maintenance, materials handling and technical support. Energy efficiency and emissions reduction.	Buyer-specific qualification for in-country value-add.
		Strategic access to logistics and servicing capability.		Cost, operating model and practicalities of a regional presence.
Morocco	Significant phosphate and select metals projects alongside exploration activity.	OCP-led phosphate operations and expansion.	Water treatment and recycling, minerals processing, materials handling and reliability.	Concentrated buyers and incumbent relationships.
		Managem, Aya Gold & Silver and funded metals exploration or development programs.	Energy management and renewables integration. Exploration & geological services.	European-facing commercial market and French-language capability. Local delivery and servicing model.
Egypt	Market amidst significant mining and investment reforms with selective current demand.	Technologies and services linked to funded exploration and airborne survey.	Mineral surveying, drilling, geological modelling and studies.	Monitoring of project funding and contracting. Customer-specific procurement, import arrangements, payment considerations and technical support.
		Short-term prospects with Sukari gold mine and industrial minerals.	Water, minerals recovery, maintenance and specialist site services.	
Türkiye	Mature, competitive mining market with demand for specialised technical solutions.	Optimisation and upgrades of operational mines and process plants across boron, gold and other metals.	Mineral processing, optimisation and water management.	High domestic and global competition with local support and servicing requirement.
			Fleet maintenance and reliability. Underground systems, safety and training.	Currency fluctuations and commercial risk.

Report objective and market focus

This report is designed to assist Australian METS companies to assess and prioritise opportunities across Saudi Arabia, Morocco, Egypt, Türkiye and the United Arab Emirates.

It provides practical, evidence-based market intelligence to identify where Australian mining capability may be most relevant, which opportunities present the strongest medium- to long-term prospects, and where further market research, customer engagement or business development activity may be warranted.

Why these markets, why now

The markets examined in this report form a growing mining and minerals processing corridor, characterised by significant capital investment, development ambitions and increasing demand for international expertise. Together, they present a significant diversification opportunity for Australian METS, provided market engagement is tailored to the distinct operating conditions, procurement practices and local requirements of each market.

Saudi Arabia

Economic Profile: Large, high-income economy; GDP US\$1.28tn in 2025.

Economic Structure: Oil-dominated, but diversifying into manufacturing, infrastructure and mining.

Mining Profile: Large mineral endowment: gold, copper, phosphate, bauxite and critical minerals.

Mining investment: Strong exploration growth.^[1]

Morocco

Economic Profile: Diversified, middle-income economy; GDP US\$182bn in 2025.

Economic Structure: Manufacturing, agriculture, tourism, phosphates, automotive, aerospace and renewables.

Mining Profile: Leading phosphate producer with growing metals activity.^[3]

Mining investment: Diversification beyond phosphate, including copper and cobalt.

Türkiye

Economic Profile: Large, industrialised economy; GDP US\$1.60tn in 2025.

Economic Structure: Diversified across manufacturing, construction, trade, services and energy.

Mining Profile: Mature mining sector; major boron and natural-stone industries, plus gold, chromite and copper.^[5]

Mining investment: Ongoing exploration.

United Arab Emirates

Economic Profile: Large, high-income economy; GDP US\$552bn in 2025.

Economic Structure: Oil plus trade, finance, construction, manufacturing, logistics and real estate.^[2]

Mining Profile: Limited domestic mining; significant metals processing and industrial activity.

Mining investment: Growing critical-minerals and international mining investment.

Egypt

Economic Profile: Large, diversified economy; GDP US\$365bn in 2025.

Economic Structure: Diversified across services, manufacturing, construction, energy, tourism and agriculture.

Mining Profile: Developing relative to geological potential; gold is the main current opportunity.^[4]

Mining investment: Egypt’s target of increasing mining’s contribution to GDP to 5–6% is a policy ambition, rather than its current contribution.^[4]

Economic profile gross domestic product (GDP) figures use the latest World Bank current price GDP data available in September 2026: Saudi Arabia^[6], Türkiye^[7], Morocco^[8], Egypt^[9] and the UAE^[10]. Egypt’s 5–6% mining contribution is a policy target, not current output.^[4]



Research methodology and acknowledgements

This report draws on desktop research that prioritises published information from government agencies, mining and industrial operators, and official procurement or trade systems. Sources are listed at the end of the report and were accessed up to September 2026 unless otherwise noted.

Austmine supplemented this research with interviews involving mining companies, METS businesses and other industry stakeholders across the region. These interviews provided practical insights into customer requirements, procurement processes, operating conditions and common market entry challenges.

The research was also informed by a survey of 29 Australian METS companies, including businesses already active in the region and those considering future market entry. The survey helped identify current levels of engagement, markets of interest and the principal entry barriers experienced or anticipated by Australian suppliers.

Findings were tested by Austrade regional offices, whose in-market knowledge provided additional context and helped validate the practical relevance of the analysis. The Saudi Arabia and United Arab Emirates sections were also reviewed by Altios consultants, who provided feedback on market conditions and commercial considerations. Capability requirements and market entry pathways in Türkiye were informed by research from the Australian Turkish Chamber of Commerce.

Austmine gratefully acknowledges the organisations and individuals who contributed their time and experience to the research. Their input informed the report; however, the analysis, assessments and conclusions remain those of Austmine and should not be interpreted as formal endorsement by any contributing organisation.

How to use this report

The priority markets examined in this report differ significantly in their mining maturity, customer base, procurement systems and market entry requirements. They should not be treated as a single, uniform regional opportunity.

The analysis of each market therefore considers:

- the role of the market within the regional mining and minerals ecosystem
- major operators, industrial customers and project development activity
- operational needs and alignment with Australian METS capability
- customer, procurement and commercial pathways
- localisation, delivery and servicing expectations
- issues that require buyer-specific or professional validation.

The market assessments are intended to help companies identify potential opportunity alignment and to support initial market investigation. They are not a substitute for detailed opportunity, partner, legal, tax or transaction-level due diligence. Opportunity assessments should be considered alongside current security conditions, transport reliability and counterparty requirements. These factors may affect the timing and cost of visits, mobilisation and delivery.

Market analysis and opportunity assessment

“The global race for critical minerals is accelerating, and this region is primed for significant growth across the whole value chain, from exploration and mine development to processing and metals production. Australian METS companies have the world-leading solutions to compete globally and to help build these industries. Now is the time to engage.”

*- Dr Robert Trzebski,
Director International Business,
Austmine*



Saudi Arabia

Building a world-leading mining and minerals ecosystem

Among the markets assessed in this report, the Kingdom of Saudi Arabia offers the broadest combination of operating demand, exploration activity and funded mining and processing development.

Saudi Arabia’s Vision 2030 strategy has set the course for a substantial program of mining activity and investment. Central to this agenda is the ambition to establish mining as the third pillar of the economy to unlock an estimated US\$2.5 trillion in untapped mineral wealth.^[1]

The scale and pace of Saudi Arabia’s economic diversification is creating the foundations needed to realise this potential. Legal and regulatory reforms, investment incentives, international partnerships, and the adoption of advanced technologies and processes for geological data collection are working in parallel to accelerate exploration, development and capital across the Kingdom’s mining industry.

Maaden, the Middle East’s largest multi-commodity mining and metals company, is at the centre of Saudi Arabia’s mining expansion, and has outlined a US\$110 billion ten-year investment program to triple its phosphate and gold production and double aluminium output.^{[23][2]} Current development priorities include the Ar Rjum gold mine, the Phosphate 3 expansion and the planned rare-earth refining joint venture with MP Materials, backed by the US Department of War.^{[13][21][24]}

The scale of the mining opportunity in Saudi Arabia is demonstrated by the extensive exploration campaign underway across the Kingdom, with spending reaching an estimated US\$346 million in 2025 from approximately US\$50 million in 2020.^[3]

Maaden remains the exploration leader in Saudi Arabia, including work around existing operations. On 18 August 2026, Maaden and Aramco signed a shareholders’ agreement for a proposed exploration and hard-rock mining venture covering approximately 182,000 km² in Zone-4 of the Arabian Platform. The agreement taking effect and the venture being incorporated remain subject to approvals and other conditions; procurement arrangements should be confirmed before suppliers treat the announcement as an opportunity to bid.^[4] Saudi Arabia has also attracted investment or exploration commitments from Ivanhoe Electric, Barrick, Hancock Prospecting, Vedanta, McEwen Mining and Zijin Mining.^{[5][6][7]}

The Australian METS sector holds a strong position within the Saudi Arabian mining industry, with Australia’s expertise, innovation and reputation highly respected in the Kingdom. METS businesses active in Saudi Arabia are primarily supporting exploration campaigns, geological surveys, resource and feasibility studies, and mine and processing plant design. However, with Saudi Arabia’s mineral endowment transitioning from potential to projects, Australian METS companies need to position their business to capture opportunities across the mining value chain.

Market at a glance

Saudi Arabia snapshot	
Market outlook	Long-term mining and processing regional hub
METS priority	Gold, copper, zinc, phosphate, bauxite, aluminium, industrial minerals and select critical minerals and rare earths
Strongest METS alignment	Current: Exploration, geoscience, engineering and design, infrastructure development, water management, safety and training. Emerging: Digitisation and automation, advanced minerals processing, waste management, maintenance and asset reliability, contract mining services, maximising recovery.
Priority customers	Maaden – immediate opportunities across project portfolio and expansions. Al Masane Al Kobra Mining Co. (AMAK) – operating copper, zinc, gold and silver producer. EPCMs and delivery partners – Worley and JESA (Phosphate 3, Phase 1), Bechtel (Ar Rjum) and Hatch (Maaden strategic delivery partner). Mining contractors – Contractors undertake a significant proportion of mining services, such as Byrnecut supporting underground development and production at Maaden’s Jabal Sayid copper project. Exploration ecosystem – Saudi Geological Survey, exploration licence holders.
Typical access pathway	Engage Maaden, the appointed EPCM or the mine contractor according to who specifies and purchases the solution.
Key commercial considerations	Increasing local content, employment and service requirements. Access to Maaden procurement pathways, contractors and business units. Confirm Saudi delivery, partner or presence requirements for work, together with payment terms and after-sales support.

“We see this as a once-in-a-generation opportunity in the region. There’s support from the highest levels to develop the minerals sector and the investments are there.”

- Steve Ledger, Regional VP, Strategic Partnerships, Fleet Space Technologies

Saudi Arabia mining and processing operations

- 1

Mansourah-Massarrah
Maaden | Gold | Operating
- 2

Ad Duwayhi
Maaden | Gold | Operating
- 3

Mahd Ad Dhahab
Maaden | Gold | Operating
- 4

Bulghah
Maaden | Gold | Operating
- 5

Sukhaybarat
Maaden | Gold | Operating
- 6

As Suq
Maaden | Gold | Operating
- 7

AlAmar
Maaden | Gold | Operating
- 8

Jabal Sayid
Maaden Barrick Copper Co. | Copper | Operating
- 9

Al Ba’itha
Maaden | Bauxite | Operating
- 10

Az Zabirah
Maaden | Bauxite/Kaolin | Operating
- 11

Al Jalamid
Maaden | Phosphate | Operating
- 12

Al Khabra
Maaden | Phosphate | Operating
- 13

Al Masane
AMAK | Copper/Zinc/Gold/Silver | Operating
- 14

Moyeath
AMAK | Copper/Zinc | Operating
- 15

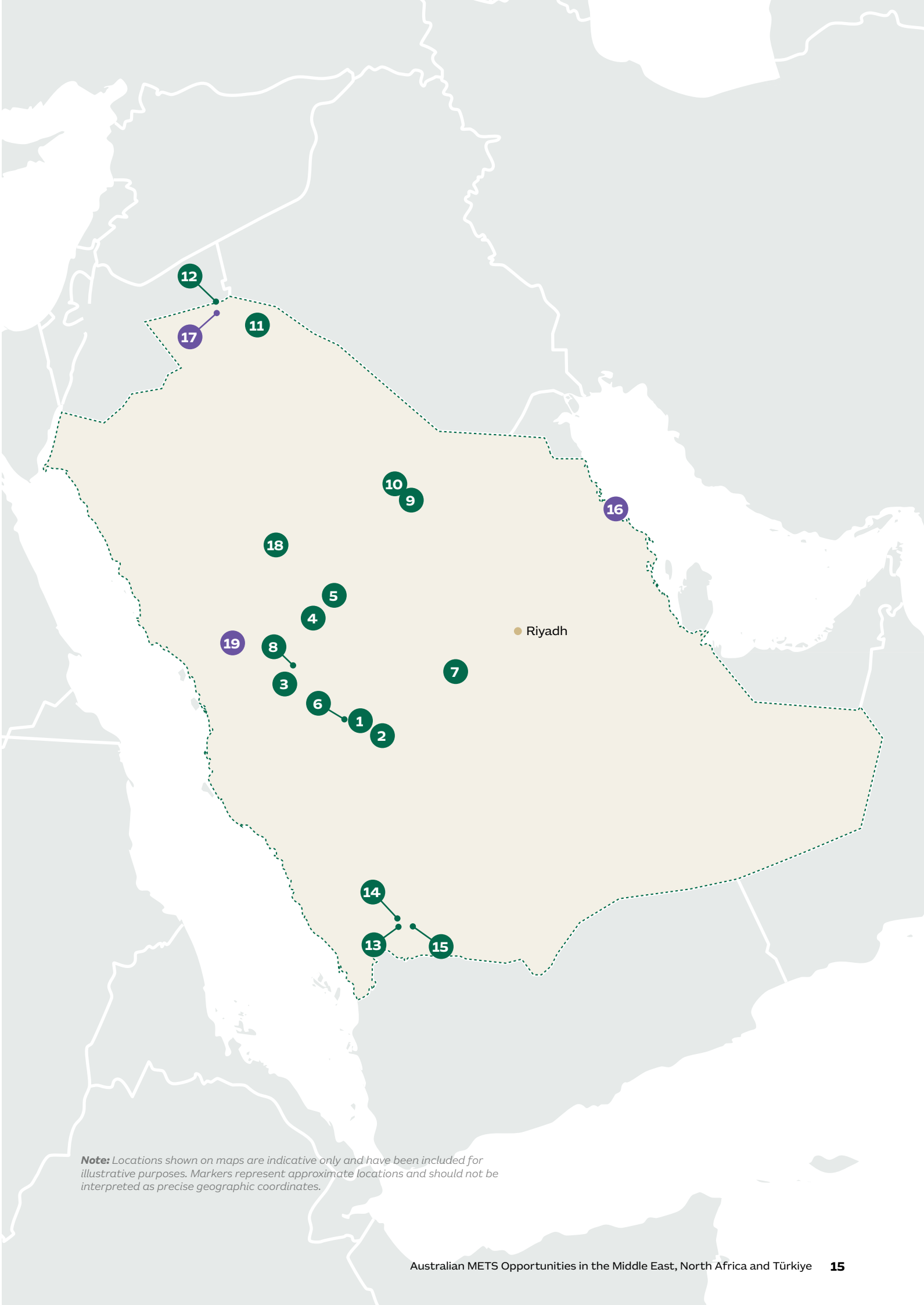
Guyan
AMAK | Gold/Silver | Operating
- 16

Ras Al-Khair minerals complex and port
Maaden / partners | Aluminium/Phosphate | Operating
- 17

Wa’ad Al Shamal Minerals Industrial City
Maaden / partners | Phosphate | Operating
- 18

Al Ghazalah magnesite mine
Maaden | Magnesite | Operating
- 19

Al Madinah magnesite processing plant
Maaden | Magnesite | Operating
- Mine / quarry / mineral field
- Development / exploration
- Plant / port / industry
- Suspended / remediation



Mining activity and implications for Australian METS

While Saudi Arabia’s mining industry is transforming rapidly, there is a diverse portfolio of operating assets providing immediate opportunities for Australian METS.

Gold, copper and most exploration activities are concentrated principally within the Arabian Shield in the west and centre of the Kingdom. Phosphate assets are concentrated in the north and connect to the Wa’ad Al Shamal complex, while bauxite and industrial mineral operations feed downstream processing and export infrastructure at Ras Al-Khair and other eastern industrial locations.^[8]

Opportunity	Status	Australian METS alignment
Arabian Shield gold portfolio	Strongest mining cluster of operating mines and significant exploration campaigns.	Exploration solutions and services, studies, ore characterisation and process design for growth projects. Asset reliability, water management, digitisation, safety and training for operating mines.
Copper and polymetallic operations	Maaden/Barrick Jabal Sayid and AMAK operating and growing base metals portfolio.	Underground productivity, ventilation, process control, reliability, geotechnical monitoring, safety and workforce capability.
Northern phosphate system	Maaden’s Al Jalamid and Al Khabra mines connect to Wa’ad Al Shamal processing and industrial infrastructure. Phosphate 3 Phase 1 is an expansion moving towards commissioning.	Materials handling, beneficiation, process optimisation, water, energy efficiency, maintenance and environmental systems.
Bauxite mining and aluminium processing	Al Ba’itha and related mineral assets feed the integrated Ras Al-Khair processing and export system.	Bulk handling, refining and smelting support, reliability, waste management (red mud), emissions reduction, asset integrity and port-linked logistics.

Exploration and licensing pipeline	Licence releases providing significant Maaden and foreign investment activity across prospective Arabian Shield areas.	Geophysics, geochemistry, drilling, sampling, laboratories, data platforms and field systems.
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“Maaden is aiming to cut its groundwater use by 65% by 2040, and it’s already moving in that direction, a 9% cut in withdrawal and a 45% increase in treated water use in 2024 alone. That’s a real, near-term market for the water-efficient processing and recycling technology Australian METS companies specialise in.”

- Aalia Hamadeh,
Project Manager, ALTIOS Middle East



Market expansion and exploration activity

Saudi Arabia is a rapidly expanding mining investment market, driven through a structured program aligned to the Kingdom’s Vision 2030 objectives to increase mining’s GDP contribution to SR240 billion (US\$63 billion) by 2030, create 200,000 direct and indirect jobs, and attract US\$27 billion in new investment.^[1]

To capture value from an estimated US\$2.5 trillion in mineral resources across 48 identified minerals, the Kingdom has introduced a range of initiatives to build a dynamic mining investment and exploration ecosystem. These include legal and regulatory reforms, licensing and digitisation initiatives, exploration incentives and financing mechanisms, geological data programs, infrastructure investment, and international partnerships.

Maaden leads Saudi Arabia’s exploration portfolio, with much of its activity targeting areas near existing operations. On 18 August 2026, Aramco and Maaden signed a shareholders’ agreement for a proposed venture owned 51% by Maaden and 49% by Aramco. The exploration programme covers approximately 182,000 km² in Zone-4 of the Arabian Platform.^[31] The agreement taking effect and the venture being incorporated remain subject to approvals and other conditions. Suppliers should therefore confirm procurement arrangements before treating the announcement as an opportunity to bid.^[31] Maaden has also outlined a US\$110 billion investment ambition over the next decade, including plans to expand gold, phosphate and aluminium production.^{[2][21][22][24]}

Saudi Arabia has established mining partnerships and joint ventures at different stages with companies including Ivanhoe Electric, Barrick, Hancock Prospecting, Vedanta, McEwen Mining and Zijin Mining. The arrangements span existing operations, exploration commitments and proposed downstream investments.^{[5][6][7][25]}

Central to attracting investors has been digitisation and data capture, including a large-scale national geological survey program led by the Saudi Geological Survey and the development of the Ta’adeen platform as a gateway for licensing, investment incentives, prequalification and competitive auctions. The Ta’adeen platform is operated by ESNAD (Saudi Mining Services Company) under the Ministry of Industry and Mineral Resources.^[9]



Key projects

Project	Overview	METS opportunity
Jabal Sayid Copper Mine – Maaden Barrick Copper Company (50-50 JV)	Saudi Arabia’s largest underground base metals mine producing 64kt of copper in 2025, with gold and silver as by-products. Australian mining contractor, Byrnecut Group, has a long-standing partnership and undertakes underground development, production drilling, blasting, haulage, paste-fill and fleet maintenance.	Byrnecut provides an interface into the market and has introduced several Australian technologies, such as the LiveMine paperless data management system and the Transcale truck load scanner, weighbridge and truck analysis system. Current priorities for Jabal Sayid are to maintain production efficiencies and continue exploration activities to extend the life of mine. ^[10] Potential METS fit includes underground productivity, fleet reliability, ventilation, processing performance and funded exploration work; suppliers should confirm a specific operating need and purchasing route.
Mansourah-Massarrah Gold Mine – Maaden	Mansourah-Massarrah is Maaden’s flagship gold project, which is expected to produce 250,000 ounces of gold per year over its mine life. The site includes open-pit mines, a greenfield mineral concentrator and gold processing plant.	Immediate opportunities align to operational efficiencies across maintenance, fleet management, materials handling and processing optimisation. Maaden continues to explore multiple high-grade deposits south of its existing mine which indicates potential for expanded operations in the area. ^[11]
Phosphate Phase 3 – Maaden	Phosphate 3 aims to increase Maaden’s phosphate production to 9Mt annually across their two key industrial cities of Wa’ad Al Shamal (WAS) and Ras Al-Khair (RAK). Commissioning of Phase 1 infrastructure is on track to begin at the end of 2026.	Worley and JESA International are leading the design and construction of Phase 1, with support of specialist equipment and technology providers such as FLSmidth. ^[12] Operational, maintenance and optimisation support opportunities set to follow from 2027 ramp up.
Ar Rjum Gold Mine - Maaden	Ar Rjum is Maaden’s newest gold mine with an expected first production in late 2028. It is an open pit mine with a processing facility that is expected to produce 3.6 million ounces of gold over a 12-year life of mine. ^[27]	Saudi Arabian Bechtel Company and Bechtel Australia Pty Ltd are the parties to Maaden’s EPCM agreement for the Ar Rjum mine and processing facilities. The involvement of Bechtel Australia is relevant to Australian suppliers, but companies should confirm the responsible purchasing entity, supplier qualification requirements and availability of specific work packages before pursuing supply opportunities. ^[32]
Rare Earth Refinery – Maaden – MP Materials / US Department of War JV	A binding term sheet announced in November 2025 set out a proposed joint venture for rare earth refining and separation; the facility has not yet reached construction. The planned facility would process rare earth feedstock sourced from both Saudi Arabia and other global regions, producing substantial volumes of separated light and heavy rare earth oxides. ^[13]	This project remains at an early stage rather than a fully financed project under construction. However, it represents a longer-term vision of Saudi Arabia as a downstream industrial hub with supply chain opportunities including engineering and construction, specialised processing and refining technology and digital architecture.

Market approach for Australian METS

Category	Capabilities Required	Demand Drivers
Exploration solutions	Airborne and satellite geophysics, geochemical surveys, drilling services, core logging, AI-driven mineral prospectivity mapping.	This represents a more immediate opportunity, as demonstrated by the Fleet Space Technologies case study below. The Saudi Arabia mineral exploration equipment market size reached over US\$2.05bn in 2025 and is expected to grow to US\$3.7bn by 2034.^[14]
Engineering and construction	Turnkey plant design and build, civil works, remote infrastructure (roads, power, water, accommodation), project management.	Market activity is shifting from specific plant builds to a multi-decade pipeline of greenfield plant and infrastructure builds. Worley’s work on Phosphate 3 and Bechtel’s Ar Rjum EPCM contract provide routes for suppliers to investigate defined work packages. Companies should confirm the relevant package, contractor and procurement stage.^{[21][28]}
Mineral Processing and Metallurgy	Full flow sheet design and equipment supply across new projects, re-processing and conversion of waste streams to value.	Maaden’s expansion and exploration portfolio will lead to demand for the full suite of capabilities to design, engineer, construct and operate processing infrastructure. Other immediate opportunities relate to finding value streams from phosphate and bauxite waste, such as converting phosphogypsum into cement or re-processing red mud rich in elements such as rare earths.
Mine Automation, Digital and AI Systems	Fleet automation, remote operations, IoT/telemetry, satellite monitoring, data analytics platforms, communications infrastructure.	Saudi Arabia is seeking to expand and develop projects leveraging the latest advancements in digital systems and connectivity. This is evidenced by Maaden and Hexagon partnering to launch the Middle East’s first “digital mine” at Mansourah-Massarrah, including mine-to-mill digital twins, material flow intelligence, and an MoU to modernise mining curricula. ^[15]
Skills, Training and Workforce Development	Technical and vocational training, competency frameworks, localisation programs, leadership development, and digitisation and automation capacities.	Vision 2030 targets the creation of 200,000 direct and indirect mining jobs. However, a 2026 TASC Report finds that Saudi Arabia faces a projected shortage of 663,000 skilled workers by 2030, and 93% of organisations report active talent gaps. While this is not unique to mining, it illustrates the wider competition for labour as Vision 2030 projects expand across multiple sectors. ^{[16][19]}

Procurement and supplier preparation

Any long-term growth strategy in Saudi Arabia requires strong relationships across Maaden and its wider supply chain. Registration through Maaden’s Supplier Portal is the formal starting point for establishing a business relationship with Maaden and its affiliates. Foreign companies must provide documentation including business licences, certificates of incorporation, evidence of authority to operate internationally, detailed financial statements, and relevant regulatory and compliance certifications.

Registration is simply a prerequisite for engaging with Maaden. Companies must build relationships with relevant business units, identify operational needs and forthcoming opportunities, and establish a visible presence through major industry events and direct engagement. In many cases, a partnership, joint venture or representative arrangement with a well-connected Saudi entity can provide a more effective pathway into Maaden and its supply chain.

Maaden’s dedicated Technology and Innovation team may offer a particularly relevant entry point for Australian METS companies. The team identifies, evaluates and develops solutions to priority operational challenges, creating potential pathways for technology partnerships, trials and pilot projects involving specialist SMEs.

Companies should nevertheless recognise that Maaden’s local content program, Tharwah, is designed to strengthen the participation of Saudi suppliers and SMEs. This can influence procurement decisions and the competitiveness of foreign bidders, particularly for larger engineering, processing and service packages. Australian companies should therefore consider how local partnerships, in-country capability and knowledge transfer can strengthen their market proposition.^[18]

“Australian companies enter Saudi Arabia with a genuine advantage: Australian mining expertise is well regarded and there are strong existing people-to-people links between the two countries.”

- Daniel Jamsheedi, Partnership Director, Australian Saudi Business Council and Forum



Case study



FLEET

Fleet Space Technologies:
From pilots to a long-term Saudi exploration partnership

Fleet Space Technologies delivers mineral systems intelligence to mining companies worldwide. Its ExoSphere platform combines ground-based seismic sensors, satellite connectivity and machine learning to generate 3D subsurface models, giving exploration and mine development teams the data they need to de-risk and accelerate capital decisions.

Fleet entered Saudi Arabia in 2023, identifying a clear opportunity linked to the Kingdom’s rapid exploration expansion and need to cover large, historically underexplored areas. Fleet mapped the key people at Maaden and built relationships at industry conferences ahead of formal engagements.

Fleet delivered its first two pilot projects with Maaden from Australia, a deliberate strategy to prove the technology and build trust, before committing to a market Fleet did not yet know would generate real demand. The relationship subsequently progressed to a four-year strategic partnership signed in 2025 to explore more than 12,000 km² of the company’s priority projects across the Arabian Shield.

After demand had been demonstrated, Fleet formed a joint venture with Tahreez, a subsidiary of Alturki Holding, to establish an in-market presence and improve client engagement, credibility, contracting and its ability to deliver turnkey programs. This has developed into a genuine in-country operation, including geoscience teams, and field delivery teams supported by geophysical equipment.

That footprint is now being leveraged beyond the original client relationship. Fleet has extended into other major and junior exploration companies operating in Saudi Arabia and is positioning its in-country team and equipment to support mineral exploration in other Gulf states.

The practical lesson is staged commitment: prove value before making a major establishment decision and invest in credible local delivery once market fit is clear. This avoids potential risks with procurement and contracting moving slower than expectations.

Market entry and delivery expectations

Success in Saudi Arabia is driven by a long-term approach that prioritises local partnerships, networks, and sustained support. While the opportunities are significant, it is a complex market that requires considerable time and resource commitment to build and maintain relationships, support clients, and develop local workforces.

“Once there is market fit and demand, finding a credible in-country partner will accelerate everything else”

- Steve Ledger, Regional Vice President, Strategic Partnerships, Fleet Space Technologies

Saudi local content and service requirements may affect the delivery model, and METS companies should assess whether direct service, a distributor, contractor, partner or local operation can meet the specific requirement.^{[17][18]}

Saudization

Saudization, implemented through the broader Nitaqat framework and occupation-specific requirements, is becoming an increasingly important consideration. The Saudization requirement for engineering professions increased from 20% to 25% in July 2024 and rose to 30% from 30 June 2026. The current requirement applies to private sector establishments employing five or more people across 46 designated engineering professions.^[16]

Saudization requirements do not prevent companies from employing expatriate specialists, but they reduce the flexibility of relying predominantly on expatriate recruitment to fill skilled roles. Foreign companies must plan for the recruitment, development and retention of Saudi professionals as part of their operating model. This reinforces the importance of local partnerships, workforce development and knowledge transfer when entering the market.

Importation

Products entering Saudi Arabia may be subject to product conformity and customs requirements. Importers are typically required to register on the SABER Portal, an online verification system used to issue conformity certificates before goods can enter the market. Requirements vary by product classification and intended use, making product-specific confirmation an important step when assessing the commercial and delivery requirements of any opportunity.

Competition

Competition in Saudi Arabia is high and growing. The world’s major OEMs, engineering houses and technology providers have established a presence in the Kingdom, while Chinese industrial and mining companies are increasingly active. More than 750 Chinese companies now operate in Saudi Arabia across sectors including construction, manufacturing and natural resources. Chinese investment in the Kingdom reached US\$8.26 billion in 2024, an increase of 29% year-on-year, while bilateral trade reached US\$107.5 billion.^[20]

This growing international presence reinforces the need for Australian METS companies to focus on segments and applications where their expertise, technology and capabilities are clearly differentiated, while also seeking to leverage relationships with Australian businesses already active in the Kingdom, such as Worley, Ausenco and Byrnecut.

METS networks

For Australian METS companies seeking to understand the Saudi market in greater depth, the Future Minerals Forum (FMF), held in Riyadh each January, is the leading platform. Led by Austrade and supported by Austmine, Australia maintains a coordinated presence at FMF to engage with over 18,000 attendees, offering a valuable opportunity to network with current and prospective mining industry customers. Networks such as the Australian Saudi Business Council can further support the development of high-level relationships aimed at understanding, pursuing, and capturing growth opportunities in the Kingdom.

“...what the country is looking for is partners who can help solve real problems that cannot be addressed locally – partners who will work with them, rather than simply try to sell to them.”

- Daniel Jamsheedi, Partnership Director, Australian Saudi Business Council and Forum



United Arab Emirates

A regional industrial, logistics and investment platform

The UAE is not a large conventional mining jurisdiction. For Australian METS, it combines domestic customers in metals processing and quarrying with regional engineering and service functions and resources investors with overseas portfolios.

Domestic METS demand spans quarrying and bulk materials in Ras Al Khaimah, Emirates Global Aluminium (EGA) operations and EMSTEEL’s steel and building materials businesses.^{[4][7][12][16]} Abu Dhabi hosts resources investors such as International Resources Holding (IRH)^[10], while Dubai provides a commercial and logistics base. Access to an investor’s overseas portfolio still depends on the operating company’s procurement and delivery requirements.^{[11][15]}

Oil and gas remain important to the UAE economy despite diversification. The Australian Department of Foreign Affairs and Trade (DFAT) identifies their continuing role in exports and government revenue alongside growth in trade, transport, manufacturing and services. For METS suppliers, demand should be assessed through named quarrying and industrial accounts rather than inferred from the economy’s oil and gas share.^[11]

The Australia–UAE Comprehensive Economic Partnership Agreement (CEPA) entered into force on 1 October 2025. DFAT states that it will eliminate tariffs on more than 99% of Australian goods exports to the UAE by value when fully implemented in 2029. Eligibility depends on the product and rules of origin and does not automatically extend to goods re-exported to another market.^{[1][2][3]}

The UAE’s ports and international transport links support regional trade and service delivery. Jebel Ali is an established logistics node, while DFAT identifies Dubai’s role in re-export, finance and business services.^{[11][19]} Connectivity can support regional operations, but suppliers should check current routes, costs and delivery reliability. Ownership, licensing, tax and employment requirements remain separate considerations when choosing a UAE base.^{[21][25]}

For Australian suppliers, the strongest alignment in the UAE’s domestic industry is with technologies and services that improve reliability, productivity and environmental performance. A regional presence can support repeat business across several markets where the customer base and service requirements justify the investment. METS companies should weigh the UAE’s regional accessibility and logistics advantages against the real cost of establishing a local presence, and should generally only consider this once sufficient scale has been established in the region.

Market at a glance

United Arab Emirates snapshot	
Market role	Industrial processing, quarrying, regional engineering & service hub and resources-investment decision centre
Principal activity	Aluminium, steel, building materials, mining investment, logistics and regional service delivery
Strongest METS alignment	Regional delivery and service into mining markets in Africa, the Middle East and South Asia.
	Domestic industrial optimisation, maintenance, digitisation, energy efficiency, and emissions reduction.
Typical access pathway	Direct engagement with industrial buyers, investors, project contractors or regional distribution and service partners.
Key commercial considerations	Buyer-specific qualification and in-country value requirements. The cost and practicalities of local service, stockholding or a regional presence. A UAE base does not replace operating-country requirements or local delivery expectations.

UAE industrial operations and infrastructure

- 1

EGA Jebel Ali
Emirates Global Aluminium | Aluminium | Operating
- 2

EGA Al Taweelah
Emirates Global Aluminium | Aluminium/Alumina | Restoration / restart
- 3

Al Taweelah aluminium recycling facility
EGA | Recycled aluminium | Operating / ramp-up
- 4

EMSTEEL-ICAD/Musaffah
EMSTEEL | Steel | Operating
- 5

Al Ain Cement Factory
EMSTEEL | Cement/Clinker | Operating
- 6

Jebel Ali Port and JAFZA
DP World | Regional supply chain | Operating
- 7

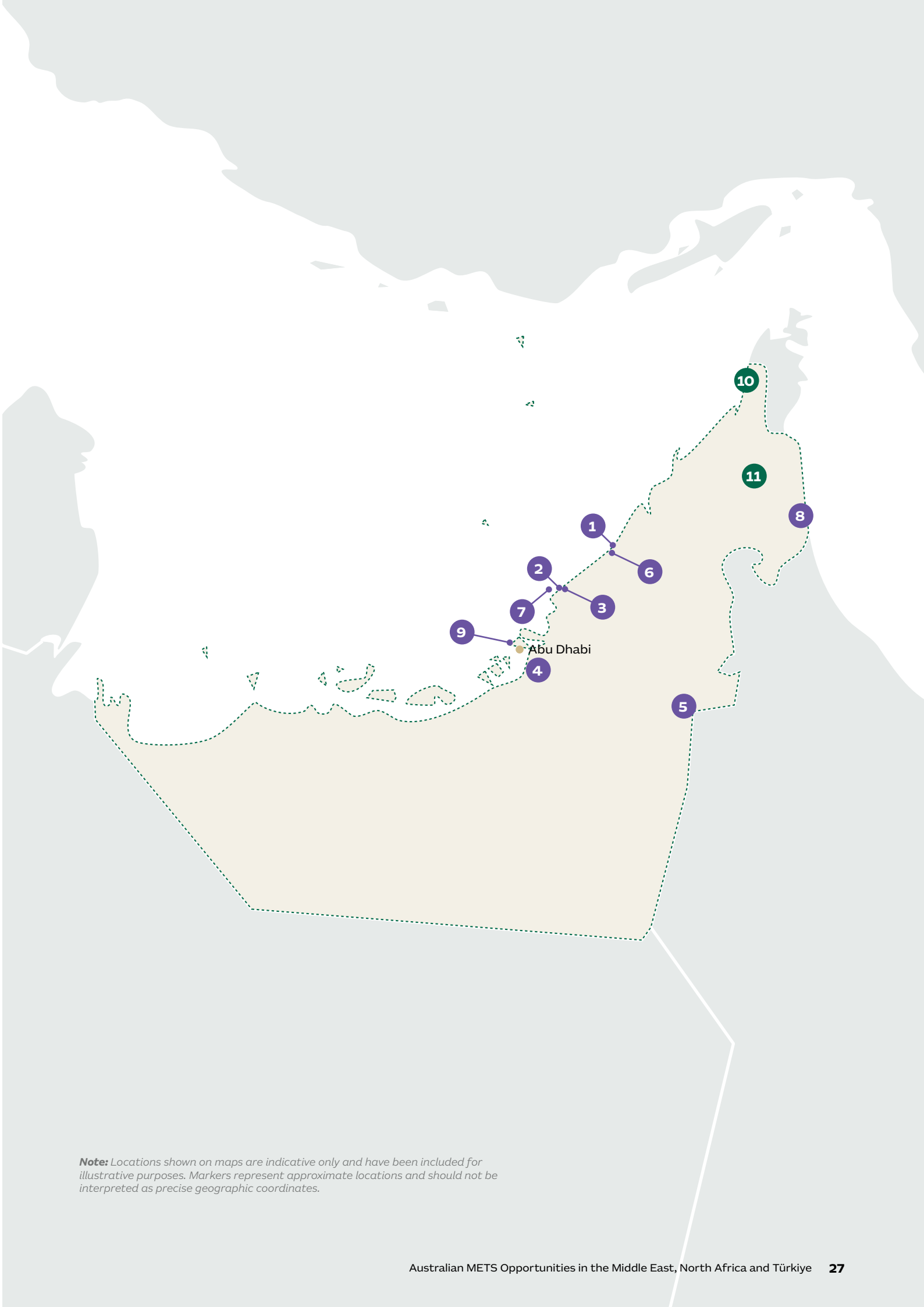
Khalifa Port and KEZAD
AD Ports / KEZAD | Industrial logistics | Operating / expansion
- 8

Fujairah Port
Port of Fujairah | Bulk logistics | Operating
- 9

Abu Dhabi resources investment node
IRH / IHC ecosystem | Mining investment | Operating
- 10

Khor Khuwair quarry cluster
Stevin Rock / RAK Rock | Limestone/Aggregates | Operating
- 11

Al Ghail quarry cluster
Stevin Rock / RAK Rock | Limestone/Gabbro/Aggregates | Operating
- Mine / quarry / mineral field
- Development / exploration
- Plant / port / industry
- Suspended / remediation



Note: Locations shown on maps are indicative only and have been included for illustrative purposes. Markers represent approximate locations and should not be interpreted as precise geographic coordinates.

Mining activity and implications for Australian METS

The UAE’s operating assets create selective opportunities for Australian METS that fall outside of the typical mining and metals portfolio.

Aluminium and steel complexes are concentrated around Jebel Ali, Al Taweelah and Musaffah/Industrial City of Abu Dhabi (ICAD). Ras Al Khaimah contains major quarrying operations. Ports and freight infrastructure connect these activities with domestic and export customers.^{[7][12][16][19]}

Near-term demand centres on plant reliability, processing performance, quarry productivity, maintenance and environmental systems. Foreign resources investment in neighbouring markets, regional procurement and service functions extend METS opportunities beyond the UAE, but access depends on the relevant asset owner, project and operating country requirements.

Opportunity	Status	Australian METS alignment
EGA: Jebel Ali and Al Taweelah	Integrated smelting, refining and recycling assets form the principal large-scale industrial cluster. Al Taweelah is in restoration and ramp-up.	Reliability, process control, energy efficiency, digital optimisation, emissions, recycling, asset integrity and major-hazard safety.
EMSTEEL and Musaffah/ICAD	Steel and building materials production provides a major industrial customer pathway.	Maintenance, condition monitoring, materials handling, process control, energy, emissions and workforce capability.
Ras Al Khaimah quarry clusters	Khor Khuwair and Al Ghail represent the clearest domestic extractive minerals activity.	Crushing and screening, wear, maintenance, dust suppression, fleet productivity, conveyors, environmental monitoring and safety.
Ports and industrial logistics	Jebel Ali, Khalifa Port and Fujairah support bulk materials, warehousing, re-export and regional service delivery.	Bulk handling, inventory visibility, condition monitoring, spares, logistics technology and regional technical support.
UAE-based resources investors	Abu Dhabi-based investors and technology functions may influence mining assets outside the UAE.	Technical due diligence, major contracting, operational improvements and portfolio-level technology deployment.

Market expansion and industrial investment

EGA’s restoration of its Al Taweelah facility, following the March 2026 shutdown, has generated plant restart requirements estimated at approximately US\$400 million in capital expenditure. The bulk of this work falls in 2026, with the remainder carrying into 2027.^{[12][13]}

The longer-term industrial pipeline is broader than one restoration program. EGA and Sunstone are planning a US\$300 million, 300,000 tonnes-per-annum anode plant, with construction from 2026 and first production expected as early as 2028. EMSTEEL is in the midst of an Asset Enhancement Program providing opportunities to support plant performance, materials handling, energy, emissions and decarbonisation. A proposed gallium plant at Al Taweelah remains at feasibility stage and should be treated as a watchlist opportunity.^{[7][13][14][17]}

Ras Al Khaimah’s quarrying industry provides a substantial domestic market for extractive equipment and services. Its largest operator, Stevin Rock, runs three sites with a combined annual capacity of approximately 80 million tonnes, according to the Ras Al Khaimah Investment and Development Office (IDO).^[16] The business is pursuing improved materials recovery and is investing in new wash plants to recover saleable sand and aggregate from waste material.

In July 2026, CFlo announced that a wet-processing plant for limestone scalpings and mine rejects had been dispatched to Stevin Rock, with commissioning still ahead.^[33] The investment illustrates demand for improved materials recovery.

The UAE also matters as an outbound resources-investment centre. For example, Abu Dhabi-based International Resources Holding (IRH) is the majority owner of Zambia’s Mopani Copper Mines following a 51% acquisition in 2024. For Australian METS firms, portfolio and technical engagement may begin in Abu Dhabi, while vendor qualification, delivery and local-value commitments occur in Zambia.^[15]

Key projects

Project	Overview	METS opportunity
EGA Al Taweelah restoration and recycling ramp-up	Restoration of the smelter is progressing towards production target of the first quarter of 2027. On 26 August 2026, EGA reported that 315 of 1,262 reduction cells had restarted. The recycling plant is also ramping up, with full production expected in late fourth quarter of 2026. ^{[12][13]}	Asset integrity, controls, safe commissioning, reliability, scrap preparation, process optimisation and emissions management. Potential suppliers need to establish which ramp-up requirements remain available and register on the EGA Supplier Collaboration Portal.
EGA–Sunstone anode plant	A US\$300 million joint venture to establish a 300,000 tpa pre-baked anode manufacturing facility in Abu Dhabi’s Khalifa Economic Zones Abu Dhabi (KEZAD), with construction commencing in 2026 and first production targeted for 2028. ^[14]	Materials handling, process and environmental controls, utilities, inspection, commissioning and maintenance. Sunstone will build for the joint venture.
Stevin Rock quarry processing upgrade – Ras Al Khaimah	Two major contracts have been awarded to support greater recovery. CFlo reported dispatch of a wet-processing plant for limestone scalpings and mine rejects on 15 July 2026, with commissioning still ahead. ^[33] CDE has announced a contract to design and manufacture a 1,000tph and a 250tph sand and aggregates wash plant to be located at the Al Ghail facility. ^[35]	Potential complementary work in wear, water recovery, plant reliability and maintenance.
IRH / Mopani transformation, Zambia	IRH reports investment of more than US\$1.1 billion since 2024 and a target to increase copper production to 300,000 tonnes per year by 2029. ^[10]	Geophysics, digital mine systems, grade control, predictive maintenance, underground connectivity and safety. IRH reports strong Zambian procurement localisation.

Market approach for Australian METS

Category	Capabilities required	Demand drivers
Maintenance and asset reliability	Asset integrity, non-destructive testing, electrical systems, controls, safe commissioning, condition monitoring and critical spares.	EGA restoration and ramp-up, together with continuing maintenance and reliability needs across metals, cement and quarry operations.
Processing and productivity	Advanced process control, materials handling, wear management, digital twins, analytics and predictive maintenance.	Operating plants and quarry fleets provide opportunities to improve throughput, availability and lifecycle cost.
Water, energy and environmental performance	Energy efficiency, water balance and reuse, dust and emissions monitoring, recycling technologies and supply chain resilience.	Recycling, industrial decarbonisation and operational resilience support demand for measurable improvements in resource use and environmental performance.
Engineering and regional technical support	Engineering, technical studies, project controls, training, remote operations, spares and field service.	UAE industrial projects and a defined multi-market customer base may support regional delivery and after-sales capability.



Australia–UAE Comprehensive Economic Partnership Agreement (CEPA)

The Australia–UAE Comprehensive Economic Partnership Agreement (CEPA) entered into force on 1 October 2025. DFAT states that tariffs will be eliminated on more than 99% of Australian goods exports to the UAE by value when fully implemented in 2029.^[1]

CEPA may improve the landed cost of eligible Australian goods, but it does not automatically waive UAE product standards, testing, import approvals or buyer qualification. Confirm the product-specific requirements before pricing or dispatch.^{[1][3][36]}

Preferential treatment is applied per product line via the good’s HS classification; exporters can identify the applicable tariff and staging schedule for a specific good through DFAT’s FTA Portal.^{[1][3]}

Procurement and supplier preparation

The UAE Ministry of Finance’s Federal Supplier Register is the mandatory entry point for selling to UAE federal government entities, requiring annual renewal to remain eligible for tenders. Industrial buyers and contractors maintain their own separate registration and approved-vendor systems. The National In-Country Value (ICV) Program, administered separately by the Ministry of Industry and Advanced Technology (MoiAT), scores suppliers on local procurement, in-country investment and national employment.

Where adopted, this score is factored directly into bid evaluation, and a missing or low score can weaken an otherwise competitive bid. Its relevance and weighting vary by buyer, however; it is not a universal procurement quota.^{[8][9]} EGA and EMSTEEL use their own supplier and site processes; Stevin Rock or its contractors buy for quarry operations. For overseas assets held by UAE investors, confirm whether the operating company purchases in the host country.

EGA reports that it procured more than US\$2 billion of goods and services locally in 2025, equal to 42% of its total procurement spend, and that it prioritises local suppliers when they are commercially competitive. This creates a practical incentive for international suppliers to add UAE-based service, stockholding or manufacturing capability.^[6]

Buyer / player	Role and likely buying route	Priority METS fit	Entry note
EGA	Owner/operator; central and site procurement; technical evaluation and vendor qualification.	Reliability, controls, process optimisation, recycling, water, energy, emissions and spares.	Identify the site department, technical sponsor and package owner; local competitiveness, content and ICV may affect evaluation.
EMSTEEL	Owner/operator in steel, cement and building materials.	Condition monitoring, automation, environmental systems, energy efficiency and materials handling.	Treat as an industrial/process account, not a mine; confirm project and maintenance package routes.
Stevin Rock / Ras Al Khaimah quarry cluster	Government-owned quarry operator and linked port/logistics users.	Crushing/screening, wear, conveyors, fleet, dust, safety and port bulk handling.	Local parts, technical service and response time are likely to be decisive.
IRH / portfolio companies	UAE portfolio and technical decision node; operating procurement occurs in host countries.	Mine digital systems, geophysics, underground connectivity, predictive maintenance and asset optimisation.	Engage both Abu Dhabi and operating-country procurement; respect host-country local-value requirements.
Worley and other EPC/EPCM contractors	Potential specifier, integrator or delivery partner depending on the named project and scope.	Packaged specialist technology, engineering inputs and commissioning support.	Confirm the contractor’s actual project role before describing access or an Australian EPCM pathway.
Distributors and service partners	Import, stockholding, installation, field service and customer access.	Equipment and systems with repeat parts, calibration or maintenance demand.	Select for technical capability and target-account access, not geographic reach alone.

“A local partner needs practical support from the Australian supplier. This includes product training, joint customer meetings and a clear explanation of the problem the technology solves.”

- Kassem Younes PSM,
Queensland Trade and Investment Commissioner to the Middle East and Africa

Market entry and delivery expectations

The value of a UAE-based presence depends on the target buyer and the volume of repeat business. A distributor or technical service partner can be sufficient where deal flow is occasional. Recurring or multi-market demand tends to justify regional staff, inventory or account management, as service depth and the ICV benefit become more material to bid outcomes.

In evaluating a partner, technical staff, import capability, field service reach and existing access to target accounts typically matter more than geographic coverage alone. Stockholding, repair, calibration, training or assembly capability become more relevant once repeat demand is established.^{[6][9]}

Commercial agency, establishment, import and re-export arrangements can have legal, tax and operational implications and should be considered in the context of the specific customer and commercial model.^{[22][25][26]}

Interviews undertaken for this report illustrate that the case for a local UAE presence strengthens as engagement in the region matures. Capital Limited, a mining services provider with a significant footprint across the Middle East and North Africa, opened its Dubai office to support business development, travel logistics and management functions. Jord, an engineering and process equipment supplier, operates from Dubai to serve the region’s oil and gas sector, where it has extensive experience. Austin Engineering, a global equipment manufacturer with recent UAE interests, plans to service local customers from Australia, with regional support under consideration as activity develops.

“The regulatory environment in the UAE and Saudi Arabia evolves constantly, licensing requirements, local content rules and market entry pathways shift regularly in both jurisdictions. Choosing the right structure and staying compliant isn’t something companies can work out from the outside. A missed filing deadline, an incorrect tax treatment or an overlooked local requirement can be costly to fix later, which is why working with an experienced service provider from the start often makes the difference between a smooth market entry and a difficult one.”

- Flavie Paquay, Middle East Director, ALTIOS Middle East

What a UAE base can, and cannot, support

Dubai and Abu Dhabi function as established regional hubs, with international air connectivity and a concentration of regional headquarters, distributors and professional services providers. The UAE is also a member of the Gulf Cooperation Council (GCC), alongside Saudi Arabia, Qatar, Kuwait, Bahrain and Oman. The GCC Customs Union applies a common external tariff to many imports, but the treatment of goods moving between member states depends on the product, origin and customs documentation. Services, procurement, value-added tax (VAT) and local content requirements still require a country-specific assessment. A UAE base therefore supports regional travel, logistics and relationship management, but each GCC market still requires separate assessment of its customs, procurement and local content rules.^{[19][11][20]}

Market	How a UAE base can help	Limitations and operating implication
UAE domestic market	Provides direct proximity to EGA, EMSTEEL, quarrying operators, engineering, procurement and construction (EPC) contractors and regional offices. A mainland company can trade directly across the UAE and pursue government work.	A free-zone licence does not, by itself, authorise direct mainland activity. The sales and import route must match the licence, customer and activity. ^[21]
Oman, Qatar, Bahrain and Kuwait	Can support account management, travel, re-export and selected stock or service functions where there is a genuine multi-market customer base.	Each market retains its own customs, standards, registration, tender and local delivery requirements. GCC integration does not create a single procurement or licensing market. ^{[19][20]}
Saudi Arabia	Useful for regional oversight, travel and relationships with companies that maintain regional offices.	Increasing Saudi requirements for business registration, importation, workforce localisation and site support may mean a base in UAE is insufficient for market growth. (see Saudi Arabia references ^[17] and ^[18])
Wider Middle East, Africa and South Asia	Dubai can provide logistics, professional services and access to UAE-based investors, traders and engineering groups with overseas portfolios.	Value depends on where procurement authority sits. Delivery, permits, taxation, local content and after sales support remain country and project specific. ^[18]

Choosing the operating model

Both mainland and free zone structures allow 100% foreign ownership for most activities. A mainland company can trade directly across the UAE and is generally the clearer route for repeat UAE sales, site services and government work. A free zone company can suit regional management, international consulting, trading or re-export, but its licence does not by itself authorise direct activity on the UAE mainland.

Depending on the activity, mainland access may require a distributor, branch, separate licence or an applicable permit.^[21] Dubai Multi Commodities Centre (DMCC) advertises remote company setup and publishes indicative licence costs; banking, visas and operational service capability need separate planning.^{[23][24]}

An Emirati equity partner is therefore not generally required for most activities. A technically capable distributor may still be commercially important for import, field service and account access, but a registered commercial agency carries different legal obligations to an ordinary distribution agreement and should be assessed accordingly.^[24]



Warehousing and service capability

For equipment suppliers, the establishment decision concerns stock and service capability as much as office space. Free zones offer warehousing and light manufacturing alongside port and transport access, which can support regional spare-parts inventory, equipment consolidation or light assembly where licensed activity and customer demand justify the investment. Zone selection should follow customer geography and site access rather than brand recognition alone.^[34]

Free zone	Supports	Key benefit for METS
Jebel Ali Free Zone Authority (JAFZA) – Dubai	Distribution, warehousing, spare parts and light assembly.	Major port and logistics hub; strong platform for regional distribution and re-export.
Khalifa Economic Zones Abu Dhabi (KEZAD) – Abu Dhabi	Manufacturing, assembly, workshops and warehousing.	Industrial ecosystem and proximity to Abu Dhabi's energy, metals and manufacturing customers, including EGA and EMSTEEL.
Ras Al Khaimah Economic Zone (RAKEZ) – Ras Al Khaimah	Workshops, servicing, light manufacturing and warehousing.	Cost-effective industrial base with proximity to Stevin Rock and Ras Al Khaimah's quarrying and aggregates sector.
Fujairah Free Zone – Fujairah	Aggregates, bulk materials, processing and logistics.	Proximity to quarrying activity and Fujairah Port for export-oriented operations.
Dubai Multi Commodities Centre (DMCC) – Dubai	Regional headquarters, trading, consulting, engineering and professional services.	Established commodities trading ecosystem and access to international mining and trading networks.

Free zone status does not automatically exempt a business from corporate tax, VAT or compliance obligations. Tax and customs advice should cover the actual movement of contracts, goods and personnel, including sales into the UAE mainland and re-exports.^{[25][26]}

Where the target buyer applies the National ICV Program, the commercial case for local staff, procurement, stockholding, repair or assembly should be weighed against that buyer's scoring and tender requirements. A UAE address alone should not be assumed to deliver a meaningful procurement benefit.^[27]

Developing the right relationships

The Mining Show is the most directly relevant event for mining equipment and supply, typically taking place each November in Dubai. It is useful for testing regional demand, meeting distributors and engaging mining companies, contractors and government representatives.^[28]

Australian companies should also leverage the presence of Austrade's Dubai and Abu Dhabi offices, the Australian Business Council Dubai and the Australia–UAE Business Council to build market understanding and identify credible contacts.^{[11][29][30][31]}



“With more than 46 jurisdictions across the UAE, including mainland and themed free zones, each offering different regulatory frameworks, licensing activities, ownership structures, and operational considerations, choosing the right jurisdiction can be challenging. The key is to ensure that your chosen jurisdiction is fit for purpose today and aligned with your business objectives for the future.”

- Maria Libunao,
Head of corporate services,
ALTIOS MIDDLE EAST



Morocco

A phosphate mining giant diversifying for long-term growth

Morocco occupies a highly strategic position in the global food security landscape, holding an estimated 70% of the world’s known phosphate reserves, the essential building block for fertiliser production to feed a growing planet. Morocco ranks second in global phosphate rock production behind China, with an output of 36 million tonnes in 2025.^[1]

The state-owned OCP Group has led the development of phosphate reserves since 1920 and has driven substantial investment in downstream industries, producing 12 million tonnes of fertiliser in 2024 with an expansion target of 20 million tonnes annually by 2027. With global demand for fertiliser expected to grow steadily over the next decade, Morocco’s scale and longevity of reserves position the country as critical to food security and global agricultural supply chains for decades to come.^{[2][3]}

However, Morocco’s mining ambitions extend beyond phosphate. The Ministry of Energy Transition and Sustainable Development is implementing the Morocco Mining Plan 2021–2030 to diversify mineral production, increase non-phosphate exploration and support sustainable economic development. In May 2026, the Ministry launched a public competition covering 361 exploration blocks across approximately 13,000 km², supported by a digital mining cadastre to attract further mineral exploration investment.^[14]

Morocco is also seeking to leverage mineral endowment for downstream processing industries. This is evidenced by the African Development Bank Group recently approving a €100 million loan to Gotion Power Morocco to finance the development of an integrated cathode-to-cell lithium iron phosphate battery gigafactory in the Rabat-Salé-Kénitra Free Trade Zone.^[5]

While the bulk of immediate METS opportunities for base and precious metals centres on supporting exploration, geological surveying studies and front-end engineering design, a small number of strategic mining and industrial accounts are operating across copper, cobalt, gold and silver. This is led by Managem, Morocco’s main diversified mining organisation with several operating units across the country, and growing activity from Aya Gold & Silver.

Australian METS companies can access a broad range of opportunities through targeted engagement across the phosphate, metals and exploration sectors. OCP has ambitious plans to expand mining and processing infrastructure while reducing the water and energy intensity of operations. Established and developing metals mines are demonstrating a growing appetite for productivity-enhancing technologies, while significant investment from Canadian-listed mining companies is bringing international best practices and technologies to the market.

Market at a glance

Morocco snapshot	
Market role	Established phosphate and select metals operations with further project development.
Principal activity	Phosphate, copper, silver, gold, cobalt, zinc and selected industrial minerals
Strongest METS alignment	Current: Water management, desalination, specialised processing, energy infrastructure and efficiency, maintenance, materials handling, waste management, environmental performance.
	Emerging: Exploration, geoscience, drilling, mine design and development, metallurgy and mineralogy, feasibility studies, process flow modelling.
Typical access pathway	Direct engagement with the OCP or private operator business unit, or through project and engineering partners such as Worley/JESA.
Key commercial considerations	Purchasing is concentrated in a small number of major accounts, often with established suppliers and engineering partners. Identify the responsible business unit, French-language requirements, expected service response and suitable local support. Allow for extended negotiations and consider payment, currency, tax and import arrangements.

Morocco mines and processing operations

- 1

Khouribga phosphate basin
OCP Group | Phosphate | Operating
- 2

Benguerir mine / Gantour basin
OCP Group | Phosphate | Operating
- 3

Youssoufia mine / Gantour basin
OCP Group | Phosphate | Operating
- 4

Jorf Lasfar complex and port
OCP Group | Phosphate/Fertiliser | Operating / expansion
- 5

Safi chemical complex and port
OCP Group | Phosphate/Fertiliser | Operating / expansion
- 6

Tizert
Managem | Copper | Operating / ramp-up
- 7

Draa Sfar
Managem | Zinc/Lead/Copper | Operating
- 8

Imiter
Managem | Silver | Operating
- 9

Akka
Managem | Copper/Silver | Operating
- 10

Bou-Azzer
Managem | Cobalt/Nickel/Gold | Operating
- 11

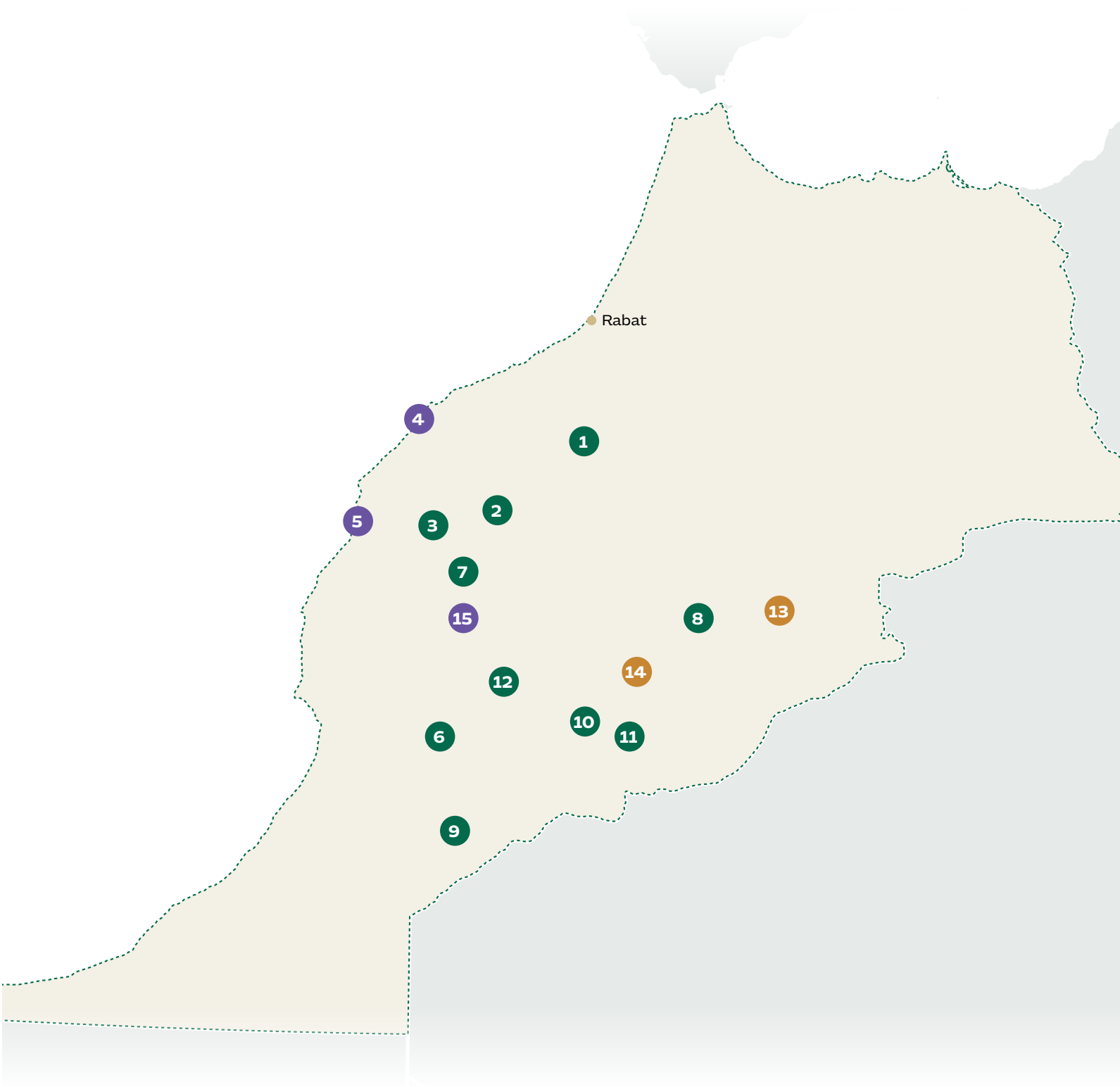
Bleida
Managem | Copper | Operating
- 12

Zgounder
Aya Gold & Silver | Silver | Operating / expanded
- 13

Boumadine
Aya Gold & Silver | Gold/Silver/Zinc/Lead | PEA / feasibility
- 14

Bouskour
Managem | Copper | Feasibility-stage / schedule unconfirmed
- 15

Guemassa mining and processing complex
Managem | Zinc/Lead/Copper | Operating
- Mine / quarry / mineral field
- Development / exploration
- Plant / port / industry
- Suspended / remediation



Note: Locations shown on maps are indicative only and have been included for illustrative purposes. Markers represent approximate locations and should not be interpreted as precise geographic coordinates.

Mining activity and implications for Australian METS

OCP’s phosphate value chain is concentrated around the Khouribga and Gantour mining basins and links to the processing and export complexes at Jorf Lasfar and Safi, with industrial activities spanning mining, beneficiation, chemical processing, fertiliser production, water and logistics.^[6]

Metals activity is more dispersed, with copper, cobalt, silver and polymetallic assets extending through the Atlas and Anti-Atlas regions and selected central and eastern districts. Managem provides the primary opportunity in metals and is continuing to expand its footprint across the region, achieving record profits and production in 2025. Canadian-listed Aya Gold and Silver operates the Zgounder silver mine and is developing the Boumadine polymetallic project.^[7]

For Australian METS companies, the strongest pathway is not broad market coverage but disciplined account selection aligned with development needs or operational priorities requiring specialised technical expertise or technologies.

Opportunity	Status	Australian METS alignment
OCP phosphate mining basins	Khouribga and Gantour are the core mining units feeding an integrated national phosphate system.	Mine planning, beneficiation, materials handling, water, energy, maintenance, automation and environmental performance.
OCP Jorf Lasfar and Safi processing complexes	OCP’s two primary chemical hubs to process raw phosphate rock into phosphoric acid and downstream fertiliser products, including significant water and export infrastructure.	Desalination and water systems, process optimisation, energy efficiency, emissions, asset integrity, waste management, maintenance and logistics.
Managem copper and polymetallic system	Tizert, Akka, Bou-Azzer, Bleida and Guemassa offer a geographically dispersed operating and growth portfolio.	Copper and polymetallic processing, project services, reliability, environmental, social and governance (ESG) systems, mine planning and technical studies.
Aya Gold and Silver Zgounder operation and Boumadine development	An expanded operating silver mine sits alongside a separate advanced polymetallic growth project.	Plant optimisation, water, digital systems, reliability, resource definition, test work and project studies.

Exploration licence holders	Licence releases and exploration activity may generate work before projects reach development.	Geophysics, drilling, sampling, laboratories, geological modelling and studies.
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Market development and exploration activity

Morocco’s strong investment environment is reflected in the Fraser Institute’s 2025 Investment Attractiveness Index, where it ranked 15th of 68 jurisdictions, up from 18th of 82 in 2024. Based on survey responses from 256 global mining companies, Morocco ranked second in Africa behind Botswana, which ranked 7th globally. ^[8]

Exploration in Morocco is largely focused on base and precious metals. It has attracted considerable foreign investment from companies listed on the Toronto Stock Exchange, such as Morocco Strategic Minerals, Stellar AfricaGold and Trigon Metals. Aya Gold & Silver’s total exploration and development expenditure across its Moroccan projects reached approximately US\$41 million in 2025, with a focus on its development of the Boumadine project.^[9]

Key projects

Project	Overview	METS opportunity
Khouribga Mining Complex and Jorf Lasfar Phosphate-Fertiliser Hub – OCP Group	Khouribga is OCP's primary mine site, producing around 70% of the Group's total output through large-scale open-pit operations. Mining involves continuous overburden removal and ore washing to produce merchant-grade phosphate rock, which is then processed through washing and beneficiation plants on site, before transport via a 235km slurry pipeline to the Jorf Lasfar processing complex.	Khouribga and Jorf Lasfar form OCP's Northern Axis. OCP Group reported in July 2025 that it had achieved complete autonomy from conventional water across its industrial and mining sites, two years ahead of its original 2027 target. Current priorities include continued desalination and transfer infrastructure, renewable energy and processing efficiency. ^[13]
Bou-Azzer Cobalt Mine and Cobalt Sulfate Plant – Managem	Bou-Azzer is Morocco's founding cobalt operation and Managem's flagship cobalt asset. Mining is conducted via underground methods with historical annual output of around 1,500–2,400 tonnes of contained cobalt used for cobalt cathode.	Market sources report that Managem is commissioning a project to switch from cobalt metal to sulfate production. The plant would have a capacity of 6,000 tonnes of sulfate per year, equivalent to about 1,200 tonnes of contained cobalt. This requires new technical capabilities and presents potential opportunities. ^[10]
Tizert Copper Mine – Managem	Tizert is a greenfield copper operation that commenced production in 2025, and plans to be the largest underground mining operation in the region. Its development and ramp-up add operating and technical service demand alongside Morocco’s established metals assets.	As a greenfields site, Managem worked with Epiroc to embed digitisation technologies such as real-time personnel and vehicle tracking and safety systems. ^[11] METS applications include plant reliability, maintenance, operating optimisation and workforce capability as copper concentrate production ramps up, along with efficiency-enhancing systems leveraging the mine’s digital architecture.
Boumadine Polymetallic Project - Aya Gold and Silver	Boumadine is a development-stage polymetallic growth project. Aya published an updated preliminary economic assessment on 9 September 2026 outlining a combined open-pit and underground plan with a 14-year mine life. A feasibility study and environmental and social impact assessment (ESIA) are underway, supported by a 400,000-metre drilling program across 2026–2027. ^[15]	Near-term METS opportunities relate to engineering, metallurgical testwork, water and infrastructure design, resource-definition and drilling. Future procurement packages remain prospective until the feasibility study, approvals and funding are further advanced. ^[9]

Market approach for Australian METS

Category	Capabilities Required	Demand Drivers
Water & desalination technology	Seawater desalination plant design and construction; non-conventional water treatment and reuse systems; water-efficient beneficiation and processing technology; water recycling and tailings water recovery.	Water scarcity makes desalination, transfer and reuse central to OCP’s operations. OCP reported autonomy from conventional water across its industrial and mining sites in July 2025 and continues to develop water infrastructure at Jorf Lasfar and Safi. ^{[6][13]} Water availability also affects project planning in inland exploration areas.
Renewable energy & decarbonisation	Solar and wind power integration for mine sites; green hydrogen/ammonia production expertise; grid connection and hybrid power system design; carbon capture/reduction technology.	OCP targets 100% renewable energy by 2027 and carbon neutrality (Scopes 1 and 2 by 2030, Scope 3 by 2040), backed by a US\$13 billion 2023–2027 investment program. ^[12]
Mining equipment & processing technology	Slurry pumps, hydrocyclones and separation equipment; crushing, grinding, and beneficiation plant technology; energy-efficient processing systems; equipment suited to open-pit and underground hard-rock operations.	OCP’s ongoing Khouribga/Benguerir/Louta expansions and Managem’s new mines (Tizert, Bou-Azzer sulfate plant) require modern, efficient processing equipment as production scales and OCP pursues its 20 Mt/year 2027 fertiliser target. ^[13]
Mine automation & digitalisation	Real-time personnel/vehicle tracking systems; remote and autonomous drilling/haulage technology; digital mine planning and orebody modelling software; data management and IoT sensor systems.	Managem’s “digitalised greenfield” approach at Tizert signals appetite for automation from project inception. OCP’s existing sensor-based slurry pipeline monitoring shows precedent for data-driven operations.
Exploration & geological services	Diamond and reverse-circulation (RC) drilling contract services; geophysical surveying; assay and metallurgical test work laboratories; resource estimation and reporting under Canada’s National Instrument 43-101 and the Australasian Code for Reporting of Exploration Results, Mineral Resources and Ore Reserves (JORC Code).	Rapid growth in junior explorer activity (Aya, Morocco Strategic Minerals, Stellar AfricaGold, Steadright, Trigon, CMR) with limited major international drilling contractor presence currently established in-country.
Environmental, safety & sustainability consulting	ESG compliance and reporting aligned with European Union (EU) standards; mine rehabilitation and closure planning; quality, health, safety and environment (QHSE) systems and auditing; community development program design.	Morocco’s green mining agenda is explicitly aligned with EU sustainability standards to support its export relationship with Europe. OCP and Managem both publicise strong sustainability and community commitments, and EU-linked trade requires demonstrable compliance.

“A local presence, either directly or through a qualified local partner or distributor, is a key success factor for large-scale projects. OCP typically seeks strategic partners capable of creating long-term value, rather than transactional supplier relationships.”

- Driss Sekkat, Investment Director, Austrade

Procurement and supplier preparation

Morocco has historically had no mandatory local content requirements in place. However, a draft mining code reform is set to examine the transfer and leasing of exploitation permits, regulates subcontracting, and prioritises local employment and training through a new professional mining card.^[16]

Customs duties and any zone-based incentives depend on the product, location and activity. Suppliers should confirm the applicable treatment before pricing equipment or choosing an import route.^[17]

OCP is the central account, and access differs according to the scale and nature of the requirement. Selected components and equipment may move through formal supplier and online procurement processes, while larger projects are more likely to involve sustained local engagement, engineering partners and a partnership-based delivery model. This reinforces the need to identify the relevant project and technical pathway rather than treating OCP as a single procurement channel.^[18]

A potential avenue for Australian METS companies to development and engineering opportunities may be through JESA, the joint venture between OCP and Worley. They provide significant project management and delivery capabilities across OCP’s major industrial and mining units, along with access to opportunities in other markets, such as Maaden’s Phosphate 3 Phase 1 expansion in Saudi Arabia.

“In Morocco, a strong local agent is essential to securing projects. Occasional proposals submitted remotely are unlikely to succeed without an established local presence and relationships”

- Shane Freeman, Senior Sales Manager, JORD International

Market entry and delivery expectations

Morocco should be approached as a distinct, European-facing commercial market, as business practices, customer expectations, and route-to-market considerations differ materially from the Gulf region or Africa. Commercial and technical engagements are often carried out in French language, and this shapes practical requirements for market access.

The most successful foreign entrants have established local delivery capability rather than exporting on a fly-in basis. Australian METS companies should seek a Moroccan agent, JV partner, or local service model to help navigate local content requirements, business and cultural practices, delivery of post-installation support and training, and the significant time and resource commitment required to build relationships.

Australia’s relative geographic distance and limited existing investment in Morocco’s mining industry present a potential competitiveness challenge. Morocco’s integration with European markets, along with significant investment from Canadian junior miners and explorers, has brought supply chains and technical solutions from those regions already embedded in the market. Morocco’s mining sector is also explicitly aligning its sustainability standards with the EU, and suppliers should expect scrutiny on carbon footprint, health and safety certification, and ESG standards.

For Australian METS investigating the market, the annual International Mining Congress (IMC) in Rabat offers the key platform to connect with industry and establish relationships with major mining houses, explorers and potential in-market partners. Companies can engage with Austrade’s office in Paris to receive advice, connections and support for the Moroccan market.

“It is important to approach Morocco as a distinct market rather than grouping it with the Gulf countries. The business mindset and decision-making processes are shaped by a different context, with many practices being familiar to European companies.”

- Driss Sekkat, Investment Director, Austrade

Case study



Jord: **Entering Morocco through relationships, references and an in-market representative**

Jord is an Australian METS company specialising in minerals processing technology and modular plant solutions. Building on its Middle Eastern operations, Jord is constantly expanding its presence into North Africa.

Jord is pursuing an opportunity to improve plant operating systems for a major Moroccan phosphate producer. Its approach has focused on collaboration with engineering houses, EPC contractors and end users to develop opportunities and maintain strong local relationships. Building trust and identifying suitable local representation have been important in understanding customer expectations and establishing credibility. The customer's openness to local and international operating references has enabled Jord to demonstrate its technical capabilities whilst building long term relationships in the region.

Morocco is a competitive industrial market with established international suppliers. Jord's experience reinforces the importance of proven technology, relevant test work and demonstrable operational benefits, supported by strong customer interaction and ongoing technical support. Commercial ongoing negotiations have required consideration of contractual, financial and regulatory matters, including exchange rates and withholding taxes, highlighting the value of local expertise and appropriate professional advice.

Jord's experience demonstrates that successful market development relies on technical credibility, flexibility, effective communication and sustained local engagement. Combining international expertise with trusted local partnerships provides a strong foundation for long-term growth in Morocco.





Egypt

A market amidst significant reform and transformation

Egypt’s mining industry is undergoing significant regulatory and institutional change linked to the government’s objective to raise mining’s contribution from around 1% of GDP to 5–6% over the coming years.^[1]

To deliver this target, the Mineral Resources and Mining Industries Authority (MRMIA) has an expanded mandate covering mining, downstream industries, and value creation. It has launched a comprehensive reform platform to attract investment into the sector, including modernising the industry’s legal framework to align with international best practices, creating competitive fiscal terms and stability clauses, delivering a suite of investment incentives, and driving a digital transformation agenda to increase efficiencies, transparency and governance.^[8]

To support future mining activity, Egypt has launched its first nationwide airborne mineral survey in 42 years. Led by the Ministry of Petroleum and Mineral Resources and MRMIA with Xcalibur Smart Mapping, the program covers six strategic regions and uses advanced airborne geophysics, artificial intelligence and multi-source geospatial data integration to generate higher-resolution geological information and reduce exploration risk.^[2]

The early signs of these reforms have been promising, with initial results indicating increased international interest, new exploration commitments and companies returning to Egypt. However, Egypt has a long path to navigate to develop its minerals sector, and the conversion of exploration licences into funded exploration programs and new mine development decisions across the next 12–24 months will be the real test.

For Australian METS companies, the strongest established mining account is the Sukari Gold Mine, owned 50% by AngloGold Ashanti and 50% by the Egyptian government.^[3] Since commencing production in 2009, Sukari has transformed into Egypt’s largest and most important mining operation, producing 500,000 ounces of gold in 2025.^[4] Sukari is the strongest proof-of-concept for Egypt’s modern gold mining industry, demonstrating that a large-scale international mining operation can be developed and operated in partnership with a major foreign investor, utilising international expertise and technical best practices.^[3]

Egypt’s longer-term prospects depend on implementation of the reforms and sustained investment. The announced changes and new exploration activity signal potential, but their practical effect on METS opportunities will be clearer as licence holders undertake funded work, secure finance and progress projects to development and construction.

Market at a glance

Egypt Snapshot	
Market role	Selective current demand with longer-term development potential
Principal activity	Gold, phosphate, copper, mineral sands, iron ore and rare earths
Strongest METS alignment	Operating-mine recovery and reliability; geoscience, surveying, drilling, water and specialist technical services
Typical access pathway	Direct engagement with AngloGold Ashanti business units, MRMIA or government-owned mining operators
Key commercial considerations	Current purchasing is concentrated around established operations and funded exploration. Test project funding and timing, identify the operator or contractor controlling procurement, and allow for equipment importation and mobilisation. Agree payment and acceptance terms and confirm the technical support and partner capability needed for the work.

Case study

Egypt’s exploration opening and the execution test

SRK Exploration has worked with Egypt for almost a decade and is in an unparalleled position to understand the transformational change underway in the market. According to their Managing Director, Colin Rawbone, a shift from a closed, high-risk, first-mover play to a more credible destination for international participation is rapidly developing, driven by national geoscience studies, a more accessible cadastre and a broader multi-commodity exploration focus.

These significant reforms have brought a maturing base of exploration companies and service providers, including drilling companies, laboratories and technical experts, demonstrating the development towards a vibrant mining ecosystem. SRK believes these international players are bringing in modern and expatriate skill sets to supplement a strongly academic domestic technical base and well-established infrastructure.

While the transformation is real and rapid, the mining industry development will take time, effort and investment. SRK notes that while signs are positive, Egypt must sustain the momentum, and potential investors will want to see outcomes from initial explorers.

“I’ve never seen a country and a government so proactive in turning things around and making it open to external investment and people coming into the industry.”

– Colin Rawbone, Managing Director, SRK Exploration

Egypt mines and processing operations

- 1

Sukari
AngloGold Ashanti | Gold | Operating
- 2

Hamama West
Aton Resources | Gold | PFS / development
- 3

Rodruin
Aton Resources | Gold | Exploration / exploitation lease
- 4

Abu Marawat Deposit
Aton Resources | Gold/Copper/Zinc/Silver | Resource definition
- 5

Semna
Aton Resources | Gold | Resource drilling
- 6

Nugrus block
AngloGold Ashanti | Gold | Exploration
- 7

Um Rus Block
AngloGold Ashanti | Gold | Exploration
- 8

Abu Tartur mine
Misr Phosphate / state ecosystem | Phosphate | Operating
- 9

Abu Tartur phosphoric acid complex
Project consortium | Phosphate | Development
- 10

Safaga port
Red Sea Ports Authority | Bulk minerals | Operating
- 11

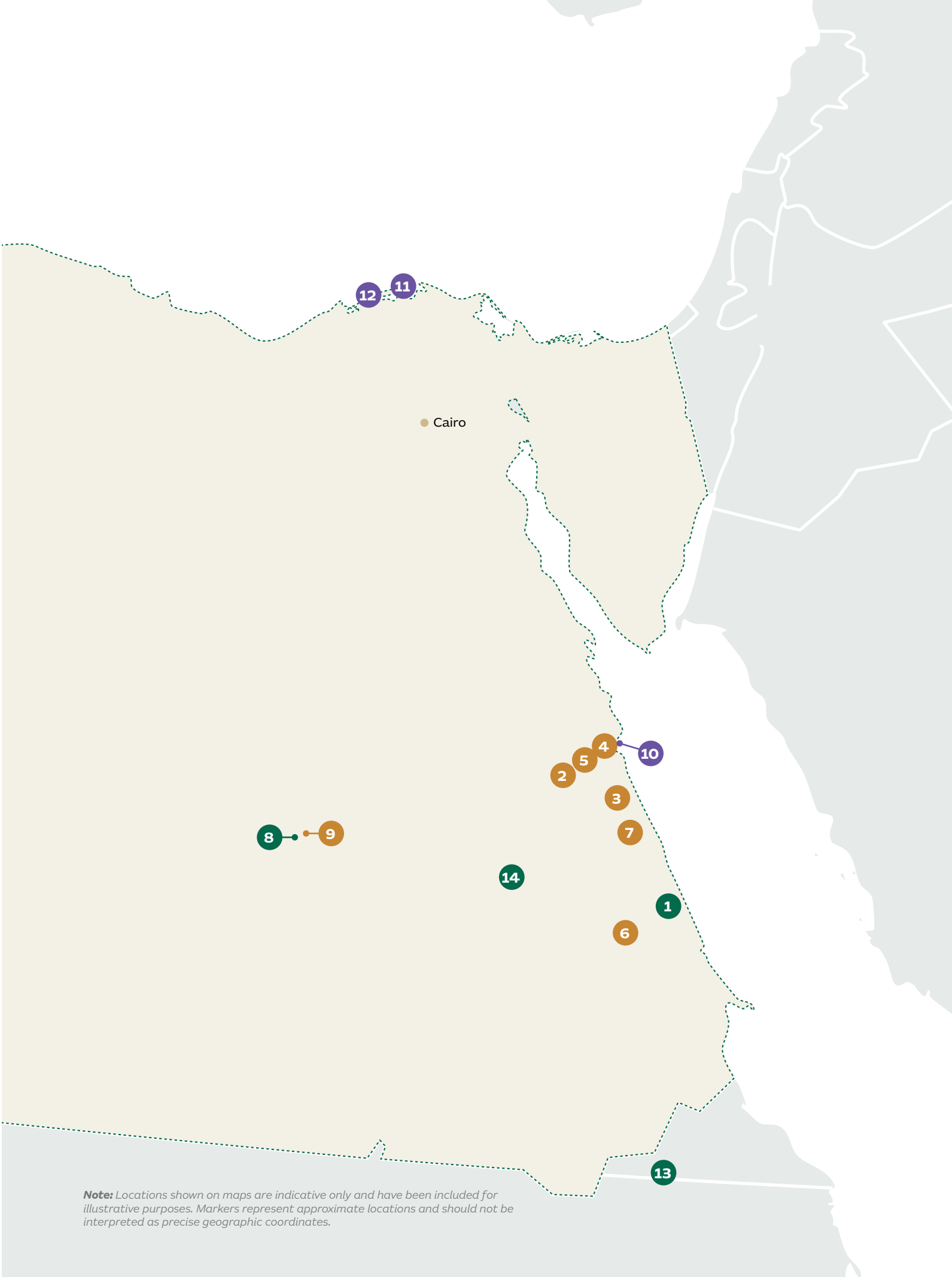
Burullus / Ghalioun black-sands complex
Egyptian Black Sand Company | Heavy mineral sands | Operating
- 12

Rasheed black-sands separation site
Egyptian Black Sand Company | Heavy mineral sands | Operating
- 13

Iqat gold project
Shalateen Mineral Resources / partners | Gold
- 14

El Sebaiya phosphate district
State / private operators | Phosphate | Operating

● Mine / quarry / mineral field ● Development / exploration ● Plant / port / industry ● Suspended / remediation



Note: Locations shown on maps are indicative only and have been included for illustrative purposes. Markers represent approximate locations and should not be interpreted as precise geographic coordinates.

Mining activity and implications for Australian METS

While gold is the main mining opportunity in Egypt, potential exists across a broad array of minerals and metals, with each commodity at a different level of maturity. The flagship Sukari operation is in the Eastern Desert within the Arabian-Nubian Shield, where much of Egypt’s gold exploration is concentrated. Red Sea ports provide important logistics hubs for current and potential gold projects. Phosphate activity is centred further west and south, while black sands processing, involving heavy minerals including ilmenite, zircon, magnetite, rutile, garnet and monazite, is located along the Nile Delta and Mediterranean coast.

For Australian METS companies, the timing of market entry to Egypt should follow project maturity rather than the size of the geological opportunity alone. Companies should track committed exploration spend, project finance and procurement timing rather than treating reform announcements alone as a signal of near-term purchasing.

Opportunity	Status	Australian METS alignment
Sukari gold mine – AngloGold Ashanti and MRMIA	A large-scale open-pit and underground gold operation providing Egypt's strongest established mining account.	Processing and recovery, comminution, maintenance, water, tailings, digital systems, safety and environmental performance.
Eastern Desert exploration	A cluster of licences and exploration activity is driving resource definition and development around the Arabian-Nubian Shield.	Geophysics, remote sensing, drilling, core and sample tracking, laboratories, field data and logistics.
Phosphate districts and Abu Tartur	Western Desert and Upper Egypt phosphate assets create a separate mining and downstream development opportunity. Most yet to be developed with small historical production from Abu Tartur project.	Exploration, mining systems, beneficiation, bulk handling, water, process engineering, infrastructure and environmental management.
Black sands systems	Largely operated by the government-owned Egyptian Black Sand Company (EBSC), this complex involves integrated dredging and processing/separation operations.	Mineral separation, magnetic, process control, maintenance, product quality and environmental monitoring.

Market development and exploration activity

Egypt’s mining sector is at an early but increasingly active stage of development. While current production is concentrated in a small number of established operations, the government’s 2025–26 reforms are expanding Egypt’s exploration pipeline.

Recent licensing activity provides an indication of sector activity. In the fourth quarter of 2025, MRMIA approved 53 decisions: 11 new exploration licences, 15 new exploitation licences, 26 exploitation-licence renewals and one land-licence request. The decisions covered minerals including feldspar, calcite, vermiculite, magnetite, iron oxide, talc, fluorspar, phosphate and glass sand. International companies are also recommitting capital, including Cyprus-based FMC, which announced plans to resume gold and mineral exploration in the Eastern Desert with around US\$20 million of investment.^{[4][5]}

“What they’ve managed to achieve in 11 months is unheard of anywhere.”

- Doug Horak, CEO, Australia-Africa Minerals & Energy Group (AAMEG)

Key projects

Project	Overview	METS opportunity
Sukari - AngloGold Ashanti (50%) and MRMIA (50%) Joint Venture	Sukari is Egypt’s largest modern gold mine. The operation produced 500,000 ounces of gold in 2025 and combines open-pit and underground mining with a large processing plant. ^[3]	In August 2026, AngloGold Ashanti announced various initiatives to increase the mine's long-term value, including upgrading the mining fleet, accelerating waste stripping, and improving the processing plant to enhance gold recovery. They also noted ongoing exploration on the Little Sukari project to expand mineral resources. ^[6]
Hamama West – Aton Resources	Aton targets first production in 2027 from its proposed Hamama West heap-leach project. Aton agreed a facility of up to US\$30 million in September 2026 for further exploration and development at Hamama and general corporate expenses. ^[12]	Technical studies, test work, metallurgy, project systems, infrastructure planning and future process design. Xinhai subscribed for CAD\$4 million of Aton shares and signed a non-binding memorandum to discuss potential cooperation; this does not establish an EPC award or committed plant supply. ^{[7][10]}
Eastern Desert Regional Exploration – AngloGold Ashanti	AngloGold Ashanti’s greenfield exploration portfolio in Egypt includes the Nugrus and Najd blocks in the Eastern Desert. ^{[11][6][12]}	Potential METS applications include drilling, geophysics, geochemistry, data systems and resource modelling. Suppliers should confirm the current exploration programme, budget and procurement requirements before pursuing work. ^{[11][6][12]}
National Geophysical Airborne Survey – MRMIA	Egypt has launched its first nationwide airborne mineral survey in 42 years. Xcalibur Smart Mapping is the principal international contractor, using advanced airborne geophysics, AI and multi-source geospatial data integration across six regions. ^[2]	The principal survey contract has already been awarded. Suppliers should establish whether Xcalibur or MRMIA has a defined follow-on need for data interpretation, integration or related services.

Market approach for Australian METS

Category	Capabilities Required	Demand Drivers
Mineral exploration and geological services	Geological modelling; exploration targeting; resource estimation; JORC-compliant reporting; field geology; geochemical interpretation.	Expansion of exploration following mining sector reforms and the 2026 Open Blocks system covering gold, phosphate, talc and kaolin. Egypt is seeking to attract international exploration companies and improve resource definition.
Geophysical surveying and remote sensing	Airborne geophysics; ground geophysics; hyperspectral imaging; remote sensing; 3D geological modelling; drone/UAV surveying.	Large, underexplored areas of the Eastern Desert and Arabian-Nubian Shield create demand for efficient exploration technologies. Sukari and surrounding exploration areas already use geochemical, geological, drilling and airborne geophysical techniques.
Exploration drilling and drilling technology	RC and diamond drilling; directional drilling; automated drilling; downhole instrumentation; drill optimisation; geological logging.	New exploration licences and increasing gold exploration will require significant drilling capacity. International companies are actively returning to or expanding exploration activity in the Eastern Desert.
Gold mining and mine optimisation	Mine planning; grade control; fleet optimisation; blasting; orebody modelling; production optimisation; automation.	Sukari and other gold mines coming on board with both open-pit and underground mining creates opportunities for productivity, cost and recovery improvements. Other projects depend on funding and development decisions.
Water management and treatment	Mine water treatment; desalination; water recycling; filtration; dewatering; tailings-water recovery; process-water optimisation	Water scarcity and the location of many mineral deposits in arid areas make water efficiency increasingly important. Processing expansion also increases demand for water recycling and treatment technologies.
Mining safety and workforce capability	Safety systems; fatigue management; proximity detection; mine rescue; training; competency systems; operational risk management	Expansion of mining activity will require development of technical and operational capability. Australian expertise in mine safety, training and operational systems is highly transferable to Egypt's developing modern mining industry.
Mine environmental management and closure	Environmental monitoring; rehabilitation; biodiversity management; closure planning; ESG reporting; impact assessment.	Egypt's mining reforms are accompanied by a stronger focus on internationally aligned environmental practices. New exploration and mining developments will require environmental assessment, permitting and closure planning.
Phosphate mining and processing	Beneficiation; phosphate processing; materials handling; process engineering; water management; downstream chemical processing.	The government is pursuing phosphate growth, evidenced by a July 2026 memorandum of understanding between MRMIA and Genesis Mining Egypt for a proposed US\$930 million integrated phosphate project in the New Valley. Studies, finance and procurement decisions remain ahead. ^[13]
Mineral sands / black sands processing	Mineral separation; magnetic/electrostatic separation; gravity concentration; wet processing; tailings management; process automation.	Egypt is seeking to monetise its mineral sands resources and develop downstream processing. This is a particularly relevant niche for Australian companies with mineral sands processing and separation expertise.

Procurement and supplier preparation

Current procurement opportunities are concentrated around established operations and funded exploration activity. Suppliers should identify specific purchasing requirements rather than assume that announced reforms or licence awards will generate immediate tenders.

A key factor is to determine whether the ultimate customer is a state-linked mining company or a multinational organisation, EPCM or private Egyptian operator. While government procurement generally gives preference to Egyptian-origin products, local content is not yet codified in mining-specific legislation. In practice, local content expectations at operating mines are driven by operator-level ESG and community commitments rather than statute.

For major projects that may be developed in the coming years, getting specified into the technical design is a more effective route to market than competing solely at the final tender stage. Therefore, METS companies should build relationships with these counterparts before procurement opportunities arise.

Market entry and delivery expectations

As the mining sector is still developing in Egypt, a staged approach to market entry is recommended that reduces upfront capital costs and allows a local presence. This includes initial market validation and customer mapping, establishing an Egyptian partner, and undertaking targeted business visits.

A local partner is highly valuable in Egypt, and a purely Australia-to-Egypt remote sales model is likely to be less effective for technical mining equipment and services. Key elements to look for in partners include existing relationships with mine operators, government entities and EPC contractors, and the ability to provide installation, commissioning, maintenance and Arabic-language support. The local Egyptian workforce has a high level of education and provides a strong resource to support in-market follow-up and technical requirements.

Commercial agency, distribution and importation have different registration requirements. Companies should check importer eligibility under the current GOEIC rules, including the foreign-ownership exceptions introduced by Law 173/2023 and subsequent amendments and regulations. Before contracting or shipping, confirm with GOEIC and qualified Egyptian advisers who will act as importer of record, how long the registration is valid and which conditions apply.^{[15][16]}

For equipment and parts shipped to Egypt, agree with the importer or an experienced customs broker who will arrange clearance, duties, insurance and inland transport under the chosen Incoterm. Egypt’s Advance Cargo Information (ACI) process requires advance shipment data and an ACID number. Exporters should check the current Nafeza instructions and document requirements before dispatch, including for samples and temporary imports. Confirm any claimed customs or tax incentive for the specific licence, item and transaction rather than assuming a general exemption.^[9]

For Australian METS companies looking at the market, consider starting with the Egyptian Mining Forum, taking place annually in Cairo. This is an increasingly popular event to meet the key players, with the first major Australian delegation delivered by AAMEG in 2026.

“The national level geological groups, consultancies, staffing providers, they underpin a lot of the exploration and early resource work that’s going on. Then other companies like Aton and Ankh have come in with international backers, and it’s starting to bring more modern and expatriate skill sets in to supplement what is a very academic technical group.”

- Colin Rawbone, Managing Director, SRK Exploration

Case study



Capital Limited: Building an Egyptian operating base and regional workforce

Capital Limited has maintained a long-standing presence in Egypt for two decades, with operations at the Sukari Gold Mine commencing in 2005. Initially supporting exploration drilling, Capital's role at Sukari has expanded over time into production drilling and broader mining services.

The company now employs over 600 people in Egypt. This long-term presence has been sustained by a strong focus on local employment, training and skills development across drilling, engineering, maintenance and other specialist functions. Egyptian employees now hold senior management roles across the business in Egypt and globally within Capital Limited. These roles include, but are not limited to, Senior Finance and Country Manager positions, as well as roles across Procurement, IT, Supply Chain and Maintenance, and Training.

Capital has also expanded its service offering through MSALABS, establishing the first internationally certified assay laboratory in Egypt, based in Marsa Alam. The laboratory provides sample preparation and assay services, with additional multi-element analysis supported by MSALABS' Vancouver laboratory. MSALABS has also continued to expand its activities in Egypt and Saudi Arabia.

Capital's experience in Egypt demonstrates how long-term investment in local capability, workforce development and an expanding mining services offering can support customers as the country's mining sector develops from exploration through to production.

"Since commencing operations in Egypt in 2005, Capital has grown alongside the country's mining sector, investing in local talent, developing technical capability and expanding the services we provide to our customers."

- Damien Valente, General Manager Business Development, Capital Limited





Türkiye

An established, competitive mining and minerals processing market

Türkiye offers Australian METS companies an established operating mining and minerals processing base, with opportunities concentrated in specialist technologies and services that deliver measurable performance improvements.

Türkiye spans Europe and Asia, with an estimated population of 85.8 million in 2025. Ankara is the capital and Istanbul is the principal commercial, transport and advanced manufacturing hub. Mining and minerals processing are geographically dispersed, so account selection and local service coverage matter more than proximity to one national mining centre.^{[11][12]}

Türkiye combines a diverse resource base with established mining, minerals processing and machinery capability. The Presidency of the Republic of Türkiye Investment Office’s sector profile reports that the country holds 73% of identified global boron reserves and hosts 649 international mining companies.^[13]

Boron is a defining part of the industry. Eti Maden operates under the state framework for boron mining and processing. Its mining and processing network creates opportunities across extraction, beneficiation, product quality, materials handling, plant reliability, energy and emissions performance.^{[1][2][16]}

Gold and polymetallic operations provide the clearest near- and medium-term project pipeline across surface mining, underground production and minerals processing. Eldorado Gold is investing in heap-leach, agglomeration, water, pit and underground development at Kışladağ and Efemçukuru. ACG Metals produced first copper concentrate from the Gediktepe sulphide expansion in August 2026 and has moved into ramp-up phases. Centerra is progressing a life-of-mine optimisation study at Öksüt, expected to be completed in early 2027. These are predominantly operating, brownfield or staged opportunities where optimisation, expansion and local service are more relevant than broad greenfield equipment supply.^{[17][18][19][20]}

Australian capability is most relevant where suppliers can demonstrate an advantage in recovery, safety, water management, underground productivity, fleet performance, digitalisation or lifecycle cost. Türkiye’s strong domestic machinery and engineering base, alongside European and Chinese competition, makes technical differentiation and responsive service central to the opportunity.^[14]

Market at a glance

Türkiye snapshot	
Market role	Established operating mines, processing plants and strong domestic engineering and machinery competition
Principal activity	Boron, gold, copper-zinc and other polymetallic ores; industrial minerals and natural stone
Strongest METS alignment	Minerals processing, recovery, automation, underground safety, ventilation, tailings, monitoring and selected technologies with protected intellectual property (IP)
Priority customers	Eti Maden, Eldorado Gold, TÜMAD, private operators, contractors and specialised distributors
Typical access pathway	Direct engagement with operators and industrial customers, supported where appropriate by technically capable local service or distribution partners.
Key commercial consideration	Competition from Turkish and international suppliers requires a demonstrable technical or lifecycle benefit. Turkish-language documentation, timely commissioning and after-sales support may affect selection.

Türkiye mines and processing operations

- 1

Kırka
Eti Maden | Boron | Operating / investment program
- 2

Emet
Eti Maden | Boron | Operating / investment program
- 3

Bigadiç
Eti Maden | Boron | Operating / investment program
- 4

Bandırma
Eti Maden | Boron/Lithium products | Operating / expansion
- 5

Beylikova
Eti Maden | Rare earths/Fluorite/Barite | Development / pilot
- 6

Kışladağ
TÜPRAG / Eldorado Gold | Gold | Operating / expansion
- 7

Efeçukuru
TÜPRAG / Eldorado Gold | Gold | Operating / exploration
- 8

İvrindi
TÜMAD | Gold/Silver | Operating / proposed expansion
- 9

Lapseki
TÜMAD | Gold/Silver | Operating
- 10

Çöpler
Cengiz Holding | Gold | Suspended / remediation
- 11

Hod Maden
Lidya / partners | Gold/Copper | Permitting / development
- 12

Öksüt
Centerra Gold | Gold | Operating
- 13

Gediktepe
ACG Metals | Gold/Silver/Copper/Zinc | Operating / staged development
- 14

Çayeli
Çayeli Bakır İşletmeleri / Cengiz Holding | Copper/Zinc | Operating.
- 15

Küre
Eti Bakır | Copper | Operating
- 16

Murgul
Eti Bakır | Copper | Operating
- 17

Mazıdağı
Eti Bakır | Phosphate/Metals | Operating / expansion
- 18

Eti Krom Elazığ / Guleman chrome complex
Eti Krom | Chromite | Operating
- 19

Zonguldak hard-coal basin
Türkiye Taşkömürü Kurumu (TTK) | Hard coal | Operating
- 20

Soma lignite basin
Türkiye Kömür İşletmeleri / operators | Lignite | Operating
- 21

Tunçbilek lignite district
Türkiye Kömür İşletmeleri / operators | Lignite | Operating
- 22

Afşin-Elbistan lignite field
EÜAŞ / operators | Lignite | Operating / development

● Mine / quarry / mineral field ● Development / exploration ● Plant / port / industry ● Suspended / remediation



Note: Locations shown on maps are indicative only and have been included for illustrative purposes. Markers represent approximate locations and should not be interpreted as precise geographic coordinates.

Mining activity and implications for Australian METS

Türkiye’s mining and minerals industry is geographically distributed. Western Türkiye contains the principal boron complexes and several major gold operations; copper and base-metals assets extend through northern and eastern belts; and central Türkiye contains Öksüt and the Beylikova rare-earth pilot and proposed industrial development.

Operating mines and processing complexes provide the clearest near-term opportunities. Demand aligns with recovery and throughput improvements, underground productivity, water management, fleet performance and plant reliability. Reference sites, lifecycle value and commissioning, training and after-sales support help specialist suppliers compete within this established market. Coal-related opportunities require separate consideration of the customer, funding, policy and emissions context.

Opportunity	Status	Australian METS alignment
Eti Maden boron system	Kırka, Emet, Bigadiç and Bandırma form a linked mining, processing and downstream system. ^[3]	Beneficiation, process control, automation, energy, maintenance, materials handling and downstream technology. ^[4]
Eldorado Gold Kışladağ and Efemçukuru	Operating mines with funded heap-leach, water, pit and underground work in 2026.	Recovery, water, geometallurgy, fleet, underground safety, communications, workforce capability, maintenance and process optimisation.
Gediktepe / western gold cluster	Gediktepe produced first copper concentrate on 31 August 2026 and is ramping up the sulphide circuit; İvrindi and Lapseki are established Turkish-operated assets. ^[19]	Ramp-up optimisation, flotation, concentrate handling, wear, maintenance, fleet, water and environmental systems.
Centerra Gold Inc. - Öksüt	Operating heap-leach mine with life-of-mine optimisation study expected in early 2027.	Residual recovery, solution management, low-grade ore, water, closure and monitoring.
Cengiz Holding - Çayeli	Operating underground copper-zinc mine with recent South Orebody work reported to extend mine life to 2036. ^{[21][27]}	Underground systems, processing, asset transition, reliability, water and mine-life support.
Beylikova rare earths	Pilot plant operating; government states an intention to scale toward an industrial refining facility. ^[24]	Testwork, separation, process control, water, residues, laboratories and commissioning.
Coal and industrial minerals	Large operating districts remain part of the mining system but differ in policy, emissions and capital context.	Safety, ventilation, conveyors, rehabilitation, water, dust and emissions monitoring.

Market expansion and exploration activity

Investment includes expansion and optimisation at existing operations, alongside exploration. Kışladağ’s heap-leach improvements and Efemçukuru’s underground development differ from Gediktepe’s sulphide ramp-up and Öksüt’s life-of-mine study.^{[18][19][20]} Eldorado’s 2026 guidance also includes resource-growth and discovery programs in Türkiye, supporting potential demand for exploration services.^[18]

Law No. 7554, adopted in July 2025, amended the Mining Law and related environmental legislation. It introduced decision periods for specified permissions, a rehabilitation-fee account and an investment guarantee for licence applications. The changes affect project timing and licence-holder obligations.^[15]

Beylikova remains a pilot operation, with industrial scale-up awaiting funding, design and procurement clarity. Hod Maden is now with Lidya Mines after SSR Mining’s July 2026 sale; confirm its financing and buying route. Çöpler remains suspended and was sold to Cengiz Holding in June 2026; it is not a current operating procurement account. Çayeli’s ownership change calls for a fresh supplier-qualification check.^{[21][22][23][24][27][28]}

Key projects

Project	Overview	METS opportunity
Kışladağ - Tüprag Metal Madencilik, a subsidiary of Eldorado Gold Corporation	Kışladağ is a large, low-grade porphyry gold deposit with mining via open-pit methods and processing using crushing and heap leaching. It produced 168,701 ounces of gold in 2025 and reports a 13-year reserve life to 2038. ^{[17][18][5]}	Eldorado has committed approximately US\$35 million to whole-ore agglomeration intended to improve heap permeability, leach kinetics and cycle times. A secondary crusher expansion is also underway.
Efemçukuru - Tüprag Metal Madencilik, a subsidiary of Eldorado Gold Corporation	Efemçukuru is an established high-grade underground gold operation that commenced commercial production in 2011. The operation produced 72,482 ounces of gold in 2025 and currently has an eight-year reserve life. ^{[17][18][6]}	Efemçukuru is currently progressing underground growth and development at the Kokarpinar and Bati vein systems, providing opportunities in development equipment, drilling and ground support, underground mobile equipment, ventilation, pumping, mine services, communications and mine planning/optimisation.
Gediktepe – ACG Metals	Gediktepe is transitioning from oxide-gold production to processing sulphide ore for copper and zinc concentrates. First copper concentrate was produced in August 2026, marking the start of ramp-up toward the operator’s year-end production target. ^[19]	The ramp-up provides near-term opportunities associated with mineral processing optimisation, comminution, flotation, materials handling, process control and automation, plant maintenance, water management and operational reliability.
Öksüt – Centerra Gold Inc.	Large-scale open pit mine with ore processed through a heap-leach operation. A life-of-mine optimisation study is expected to be complete early 2027, evaluating residual leaching, low-grade oxide and solution management. ^[20]	Residual recovery, solution management, low-grade ore, water, closure/reclamation planning and monitoring.

Market approach for Australian METS

Category	Capabilities required	Demand drivers
Mineral processing and metallurgy	Recovery, throughput and energy/reagent efficiency, metallurgical test work, process control, flotation and leach optimisation, supported by test work or operating data.	Boron processing, operating gold mines, Gediktepe ramp-up and study-led optimisation. Technical value needs to be demonstrated against incumbent supply.
Underground systems and safety	Ventilation, communications, tracking, ground support, geotechnical monitoring and mobile-equipment productivity.	Underground development and operating mine safety, productivity and reliability requirements.
Water and environmental performance	Water balance, solution management, tailings, monitoring, closure and rehabilitation systems.	Operating requirements, mine planning and environmental obligations.
Fleet performance and reliability	Truck bodies, wear materials, condition monitoring, rebuilds, OEM-independent troubleshooting and technician training.	Payload, uptime and lifecycle improvement at operating sites, supported by spares and responsive technical service.
Geoscience and digital systems	Exploration, geochemistry, assay, mine planning, automation, telemetry and operational analytics.	Targeted technical needs across resource evaluation, operational improvement and predictive maintenance.

“There are areas where the in-country solution simply isn’t available, and operators are open to working with specialist companies from outside Türkiye.”

- Maintenance Manager at major operational gold mining company

Procurement and supplier preparation

Most priority purchases are made through owner/operator or EPC processes rather than a single national channel. Eti Maden publishes tenders through its own system, while private operators use corporate prequalification, technical evaluation and commercial negotiation. For public tenders within scope, foreign suppliers should check whether Electronic Public Procurement Platform (EKAP) registration is required.^[7] Turkish-language technical documentation, responsive commissioning and after-sales support can be decisive.^[16]

Buyer / player	Role / active assets	How to engage
Eti Maden	State-owned boron mining, processing and product facilities.	Monitor the Eti Maden tender system and exact technical specifications. ^{[1][16]}
Eldorado Gold / TÜPRAG	Kışladağ open-pit heap leach and Efemçukuru underground/flotation.	Target site engineering and supply chain; distinguish sustaining from growth packages. ^{[17][18]}
ACG Metals / Gediktepe operator	Copper-concentrate ramp-up following the sulphide expansion.	Major sulphide equipment is delivered; focus on ramp-up, performance optimisation and next-phase scope. ^[19]
Centerra / Öksüt	Operating heap-leach mine and life-of-mine optimisation study.	Qualify further opportunity after study scope, budget and revised plan are published. ^[20]
TÜMAD	Operating İvrindi and Lapseki gold and silver mines.	Engage the relevant operator’s technical and procurement teams. Confirm current expansion plans, purchasing requirements and supplier qualification for the proposed work. ^{[8][9][10]}
Cengiz / Çayeli Bakır	Current owner/operator pathway for an operating copper-zinc mine following transfer to Cengiz Holding on 30 April 2026. ^[27]	Confirm current supplier qualification, responsible procurement entity and approved-vendor pathway. ^{[21][27]}

Turkish EPCs / distributors	Project delivery, fabrication, import, service and buyer access.	Choose partners with mining references and technical service.
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Case studies



Austin Engineering: Solving a defined productivity problem through a multinational operator

A common route to emerging markets for Australian METS companies is engagement with multinational or global mining companies that have the experience, bandwidth and capital to leverage the latest technological advancements in mining. This was the case for Austin Engineering and its expansion into Türkiye.

During the COVID period, Eldorado Gold's Turkish operation, Tüprag, contacted Austin Engineering seeking to improve haulage payload and address a production constraint. Austin engaged in technical discussions with Tüprag remotely, presenting materials, proposals and reference cases to a site committee that assessed their proposed lightweight truck body design.

Following these engagements, Austin received the first order of 11 units for trial. These were tested, validated and accepted in Turkish operating conditions, and two additional orders soon followed.

Austin reports that while it was challenged with pricing due to distance of delivery, the client was willing to invest in the long-term cost and efficiency benefits of adopting a specialist solution, backed by international references, technical experience and quantified payload benefit.

Delivery combined remote technical support with site visits, welding procedures, inspections, training tools and Austin's AustIQ condition monitoring platform. While Austin has yet to establish a Turkish entity, their delivery and follow-up support enabled Tüprag's operational team to inspect, maintain and maximise the equipment.

During this process, Austin undertook careful risk assessment and best practice procedures from potential challenges of doing business in Türkiye, such as transacting in multiple currencies, contractual milestone payments, and collaborating with their partners on logistics.

Austin's experience demonstrates that Australian METS businesses should identify the strategic accounts that are seeking to raise technical standards through exposure to international solution providers. While the broader Turkish market may be more price sensitive, this case study highlights the successful application of Australian technology in local operating conditions.

"Our best performing client in the whole world with AustIQ is Tüprag in Türkiye...they're willing to learn. They want to move forward. They learn pretty quickly."

- Brad Higgins, General Manager Sales APAC/EMEA, Austin Engineering



Gekko Systems: Entering Türkiye with specialised solutions and local partnerships

Gekko Systems, an Australian leader in gold processing and low-energy mining solutions, were first approached by FESA, an industrial engineering and equipment company based in Ankara, to support projects in Ghana and Liberia with their highly specialised processing technologies. Following three years of building a strong track record in the region, Gekko signed an agency agreement with FESA in 2024.

Fevzi Durunesil, General Manager, FESA describes Türkiye as an increasingly price sensitive market, especially for government procurement opportunities in the mining industry. For many suppliers, this has reduced competitiveness, especially with a growing presence of Chinese manufacturers often offering lower prices, faster delivery and more flexible payment terms.

FESA saw an opportunity for Gekko's specialist equipment and technical knowledge in applications where local alternatives did not meet the same need. It also valued Gekko's willingness to adapt to local regulatory and commercial requirements.

With increasing activity in the gold mining sector and operators starting to look at highly complex processing applications, such as re-processing tailings, Fevzi believes that Gekko has strong future potential in the region.

Despite this, Fevzi cautions that Australian companies must conduct significant due diligence to find that right local partner that offers reliable, wide coverage without many competing product lines. This will support in developing the market, screening potential customers, managing language and time zone risk, and taking care of importation and payments.

This case study demonstrates the value of a well-researched local partner in accessing the Turkish market, along with neighbouring mining jurisdictions.

Market entry and delivery expectations

Türkiye's investment framework provides equal treatment for international and domestic investors. This does not mean every procurement is commercially neutral, and it does not remove tax, customs, work-permit, certification or contracting requirements.^[25]

For machinery within the relevant scope, the Ministry of Trade's Product Rules Database identifies CE marking and conformity-assessment requirements. Requirements differ by product and use, so suppliers should confirm the applicable Turkish regulation, declaration, standards, importer responsibility and Turkish-language documentation before shipment.^[26]

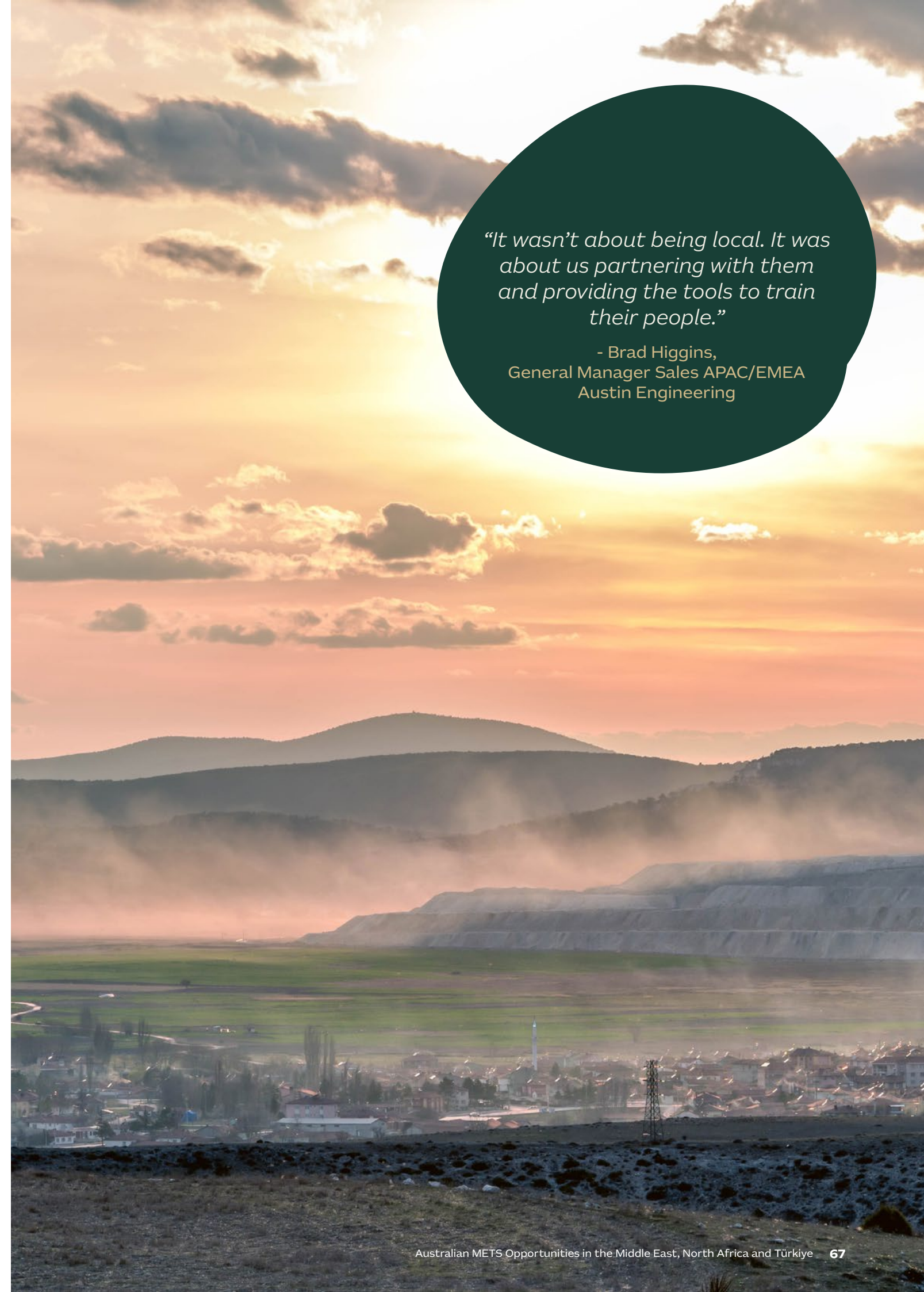
Currency movements and bid-validity periods can affect the competitiveness of imported equipment and services, particularly for longer procurement processes. The relevance of these factors will depend on the customer, contract structure and transaction currency.

Commercial arrangements need to address currency, bid validity, indexation, tax and duty, warranty, acceptance and payment terms. For partner-supported delivery, service levels, territory, customer ownership and anti-bribery responsibilities also matter. Open-ended Turkish-lira exposure and unclear commissioning-acceptance criteria can weaken an otherwise sound commercial proposition. Inventory, repair or engineering investment is most relevant where recurring demand and response-time requirements justify the cost.

The Mining Türkiye expo held every two years in Istanbul serves as a strong starting point for market intelligence and customer and partner engagement. This event brings together around 800 international companies, industry representatives, and engineering solution providers. The Australian Turkish Chamber of Commerce is also well positioned to help companies understand operating complexities, key networks and market entry pathways.

"For Australian companies, they definitely need very good, reliable local partners."

- Fevzi Durunesil, General Manager, FESA



"It wasn't about being local. It was about us partnering with them and providing the tools to train their people."

- Brad Higgins,
General Manager Sales APAC/EMEA
Austin Engineering



Comparative outlook for Australian METS

Balancing opportunity scale, capability alignment and commercial accessibility

The table below compares current opportunities, commercial constraints and practical engagement routes across the five markets.

Market	Demand relevant to Australian METS	Customer and delivery setting	Practical engagement approach
Saudi Arabia	The broadest combination of investment, exploration, mine development, operating assets and downstream processing demand.	Access to Maaden procurement and technical units, increasing localisation commitments and in-country service expectations.	Engage now where there is a defined customer need. Build technical sponsorship and determine the required Saudi partner or presence before scaling investment.
United Arab Emirates	Targeted demand in aluminium, steel, quarrying and industrial services, together with access to regional logistics and resources investors.	Domestic industrial sales and the case for a regional base are separate decisions. A UAE office does not replace country-specific customer and delivery arrangements.	Target identifiable industrial accounts first. Consider a regional service base only when repeat demand across more than one market justifies it.
Morocco	Concentrated opportunities in phosphate and fertiliser processing, operating metals assets and selected new developments.	Access is centred on a small number of major operators and project partners. Relationships, French-language capability and continuing service matter.	Use a strategic-account approach focused on OCP Group, Managem and selected project owners. Invest in local relationships and service arrangements over time.
Egypt	Current demand around Sukari, exploration, geological information and selected developments, with broader potential if reform produces funded activity.	The development pipeline remains less proven. Funding, importation, mobilisation and customer-specific procurement affect the timing of work.	Pursue specific operating or exploration opportunities selectively while monitoring whether licences convert into funded programs and development decisions.
Türkiye	An established market for specialist equipment and services across boron, gold and other mining and industrial operations.	Strong domestic, European and Chinese competition places a premium on differentiation, Turkish-language support and responsive technical service.	Engage selectively now where the solution offers measurable technical or lifecycle value that local and international competitors do not provide.

The longer-term outlook

Across the five-to-ten-year outlook, existing operations remain the firmest starting point. Saudi Arabia combines operating mines with the broadest announced expansion agenda, but each project needs its own funding and package check. The UAE offers industrial accounts and a regional service base where a defined customer portfolio supports the cost. Morocco’s phosphate and metals operations provide current demand alongside further development. Egypt’s wider prospects depend on exploration commitments, finance and project decisions beyond Sukari. Türkiye offers an established, competitive market for replacement equipment, recovery improvements and technical services.

Regardless of how immediate the opportunity, Australian METS companies should begin engaging in markets with aligned capability requirements now rather than waiting for projects to reach a bankable stage. Relationships, local registrations and in-country credibility typically take years to establish, and companies that only arrive once a package is tendered are competing against suppliers who have already built the trust and local presence the customer expects.

Survey respondent priorities and market timing

Austmine’s survey of 29 Australian METS companies found that Saudi Arabia was the most frequently selected priority market for the next one to three years, at 37.9%, followed by Türkiye at 24.1% and the UAE at 20.7%.

Longer-term choices were less settled, with 24.1% unsure of their priority and 6.9% selecting no market at that stage, an understandable outlook in such a rapidly changing region. Türkiye retained the same share over five to ten years. Interest in the UAE fell over the longer period, while Morocco attracted 6.9% of longer-term selections. No respondent selected Egypt as its highest-priority market in either timeframe. However, this does not indicate there are no export opportunities as reforms proceed.

One highest-priority market selected by each respondent (n=29)

Market or response	Next 1–3 years	Next 5–10 years
Saudi Arabia	37.9%	27.6%
Türkiye	24.1%	24.1%
United Arab Emirates	20.7%	10.3%
Morocco	0.0%	6.9%
Egypt	0.0%	0.0%
Unsure	13.8%	24.1%
None at this stage	3.4%	6.9%

Australian METS views: customer access

Respondents provided their feedback on the greatest challenges to growth in the region, with finding the right customer or decision-maker selected by 66% of respondents. Similarly, 72.4% identified introductions to customers, operators and project owners as a valuable form of support. Promotion to international customers and participation in trade events or missions were also prominent, at 51.7% and 44.8% respectively.

Support respondents considered valuable for international growth (n=29)



Australian METS companies should prioritise industry events and outreach targeted to technical decision-makers who understand operational requirements and will better engage around specialised solutions. Supplier registration may be a pre-requisite to work, but it is not a substitute for developing relationships with users of the technology.

Abed Hakmi of Austrade Riyadh emphasises the need to understand solution demand and alignment with the relevant technical department.

“Before committing to the supplier approval process, speak with the technical team and understand what they need. You need to know whether your product solves a problem they are willing to pay to fix. Then work through the purchasing requirements and how you will support the customer locally”

- Abed Hakmi, Director of Energy and Mineral Resources, Infrastructure and Defence, Australian Trade and Investment Commission (Austrade), Riyadh

Customer access is only one element of commercial considerations, and Australian METS companies provided their perspectives of other critical barriers. Local partner requirements were selected by 58.6% of respondents, limited market intelligence by 44.8%, contract risk by 41.4% and local content expectations by 37.9%. These responses indicate that companies recognise the complexity of the operating environment across the region and the need to invest in local relationships and value-add.

Delivery and support

For Australian METS companies with limited scale and resources, one of the most common challenges can be the ability to install, maintain and support a solution following the contract award.

The companies interviewed for this report each utilised different approaches that reflect the unique requirements of their customer and level of engagement in the region. Austin Engineering engaged remotely during negotiations with their Turkish customer and then supported their product through site visits, documented procedures, remote tools and customer training. Gekko and Fleet Space established partnerships with local representatives only once significant customer demand was identified. The experience of Capital Limited in Egypt and JORD in Morocco shows that providing on-site services and maintaining equipment may eventually require a larger regional or local presence.

“Customers expect ongoing equipment support and long-term relationships, making an established regional presence essential for effective after-sales service and sustainable growth.”

- Shane Freeman, Senior Sales Manager, JORD International

Finding the right partner does not automatically equal success either. Appointing a representative will have limited value if that business cannot explain the technology or obtain timely technical input from the Australian supplier. Expert interviews carried out for this report emphasised that building product knowledge and undertaking joint customer engagement is critical in markets with mining sectors that are still in development.

Implications for Australian engagement

The report findings favour focused market development, with Australian capability matched to specific customers and purchasing requirements. For Austmine and Austrade, this means keeping market intelligence close to operating needs and project progress. This requirement is not uniform across the markets. In Morocco this calls for sustained engagement with a small number of strategic accounts; in Egypt it requires close attention to exploration commitments and project approvals.

The survey also provides a basis for tailoring assistance. Twenty-three of the 29 respondents, or 79.3%, were already exporting internationally. Their needs may include assessing an unfamiliar partner, understanding a buyer’s qualification process or establishing a workable service arrangement. This supports building on existing export experience, while recognising that experience elsewhere does not establish readiness for every market covered here.

Industry events and missions can help establish the relationships needed for this work. Fleet Space’s experience shows the value of identifying target customers before an event and continuing the technical discussion afterwards. Follow-up should establish who will assess the solution, what references are needed and the next commercial step. Progress can be judged through substantive customer discussions, requests for technical information, trials, supplier qualification and subsequent work.

Continuity matters because project development and customer qualification can extend beyond a single mission or program. Australian engagement should retain a longer-term view while helping companies make proportionate commitments. A supplier with current operating customers may be able to support a regional presence; another may be better served through direct technical support or a capable partner. Assistance with these decisions, including training and after-sales arrangements, deserves attention alongside promotion.

“These are relationship-driven markets, and success takes time, patience, and commitment. Australian METS companies don’t have to do it alone. Austmine and Austrade can help you reach the right customers and partners in the region.”

Dr Robert Trzebski,
Director International Business,
Austmine

Conclusion

A differentiated opportunity for Australian METS

The Middle East, North Africa and Türkiye provide a credible diversification opportunity for Australian METS companies. The five markets provide different pathways for Australian METS companies, with substantial differences in customer demand, market maturity and commercial accessibility. Saudi Arabia has the broadest combination of operating demand, exploration and announced development activity. Türkiye provides established demand where suppliers can demonstrate a technical and service advantage. Opportunities in the UAE, Morocco and Egypt are more concentrated around particular customers, assets and funded programs.

The survey points to practical difficulties in reaching decision-makers, assessing partners and obtaining market intelligence, including among companies already exporting. The interviews add detail about proving technical value and maintaining support after a sale. Together, they indicate where assistance can be useful, without establishing that market entry will be straightforward or that the same approach will suit every company.

Where to start

Companies with limited resources should begin with the market and customer where their capability addresses a recognised need and where they can support the solution after sale. For many suppliers, Saudi Arabia will warrant the earliest investigation because of the breadth of operating and development activity. Türkiye may provide nearer-term opportunities for specialist suppliers able to demonstrate an advantage over established competitors. The UAE should be separated into two decisions: pursuing domestic industrial customers and establishing a regional base. Morocco requires sustained strategic-account development, while activity in Egypt should remain tied to specific customers, funded exploration and confirmed project progress.

What to watch

Over the next 12 to 24 months, the following milestones may indicate where more defined demand is emerging:

- Saudi Arabia: procurement and construction progress at Maaden projects, including Phosphate 3 commissioning and Ar Rjum development.
- United Arab Emirates: restoration and recycling activity at EGA, and funded procurement by other industrial and quarrying accounts.
- Morocco: OCP Group’s operating and investment program, and further study, funding and procurement decisions at Boumadine.
- Egypt: exploration licences converting into funded field programs, and project decisions beyond Sukari.
- Türkiye: Öksüt study results, Çayeli’s purchasing arrangements following the ownership change, Hod Maden financing and any formal decision on Çöpler’s restart.

These are indicators of possible demand, not guarantees that a contract will be open to Australian suppliers.

Over the next five to ten years, new investment could broaden the customer base available to Australian METS. Existing mines and industrial plants provide a foundation for engagement while that pipeline develops. Companies should use the country chapters to identify customers whose requirements match their capability, confirm the purchasing and service arrangements, and assess the resources needed to pursue the work. Austmine and Austrade can assist with market intelligence, relevant introductions and follow-up through trade diversification activity. Companies considering the opportunities in this report are encouraged to contact their Austmine or Austrade representative to discuss the most appropriate next step.

Taking the next step

Using the report to investigate a specific opportunity

The country chapters identify areas where Australian capability may be relevant. They are intended to support further investigation rather than provide a general recommendation to enter a market. For most suppliers, the useful starting point will be a specific customer, operating requirement or funded project rather than the market in isolation.

Information that can strengthen an opportunity assessment

Area to establish	Questions for further investigation	Useful evidence
Customer requirement	What operating, project or service requirement is the customer seeking to address, and who is responsible for it?	Site or project discussion, published operating priority, technical brief or defined work package.
Purchasing pathway	Does the operator, project owner, EPC or distributor specify and purchase the solution? Is supplier qualification required?	Named technical contact, procurement owner, qualification requirements and indicative timing.
Technical case	What will the customer need to assess performance and risk?	Comparable operating reference, quantified benefit, test work, pilot results or an agreed trial pathway.
Delivery and support	What installation, commissioning, training, maintenance, language and response capability will be expected?	Defined responsibilities, service model, partner capability and support costs.
Commercial basis	Are the likely order value, sales cycle and ongoing service requirements proportionate to the resources needed to pursue the work?	Indicative scope, budget status, payment and acceptance terms, import responsibility and internal resourcing decision.

Using the country chapters

The market snapshots provide an initial view of customer demand, capability alignment and the principal commercial considerations in each country. The opportunity and project tables can then be used to identify an operator, project or process relevant to the company’s offer. Before resources are committed, the current scope, budget, procurement owner and delivery requirements should be confirmed with the customer or responsible project party.

A credible initial enquiry does not require a completed market-entry plan. It should be specific enough to establish why the solution may be relevant, which customer or project it applies to, and what further information or introduction would help determine whether to proceed.

Accessing current support and information

Contacts and services for Australian METS companies

Market conditions, project timing and office coverage may change after publication. The channels below provide current information on Austrade and Austmine services, international offices, events and market activity. Support is most useful when a company can identify its relevant capability, target customer or project, and the question it is seeking to resolve.

Austmine

Austmine's international programs connect Australian METS companies with market briefings, webinars, missions and industry engagement. Companies can use the current international and events pages to identify relevant activity and contact the International Business team.

International programs: current market activity and team contacts. [View current details](#)

Events and webinars: current Austmine events and registration details. [View current details](#)

Austrade

Austrade provides eligible Australian businesses with market information, advice and connections through its Australian and international network. The level and form of assistance will depend on the company, market and opportunity. Current office and service pages should be used because staff and regional coverage can change.

METS enquiries: METSmanager@austrade.gov.au. [View current details](#)

Saudi Arabia: Austrade Riyadh office and current contact details. [View current details](#)

United Arab Emirates: Austrade Dubai and Abu Dhabi offices and current contact details. [View current details](#)

Other markets: use Austrade's international office directory or exporter enquiry service to confirm the post currently responsible for Morocco, Egypt and Türkiye. [View current details](#)

Exporter services: information on market assessment, export strategy and overseas contacts. [View current details](#)

TradeStart: local export advice for Australian small and medium-sized businesses. [View current details](#)

Austrade events: current webinars, trade shows and international events. [View current details](#)

Information that can assist an initial discussion

A brief description of the solution, the operating problem it addresses, relevant customer references and the target account or project will help Austmine or Austrade direct an enquiry. Where a company is considering a partner or local presence, it is also useful to identify the service, import, language or customer-access requirement that the arrangement is intended to address.

Austmine and Austrade can assist companies to interpret current market conditions and identify appropriate avenues for further engagement. Commercial, legal, tax, customs and partner decisions remain the responsibility of the company and should be supported by transaction-specific advice.

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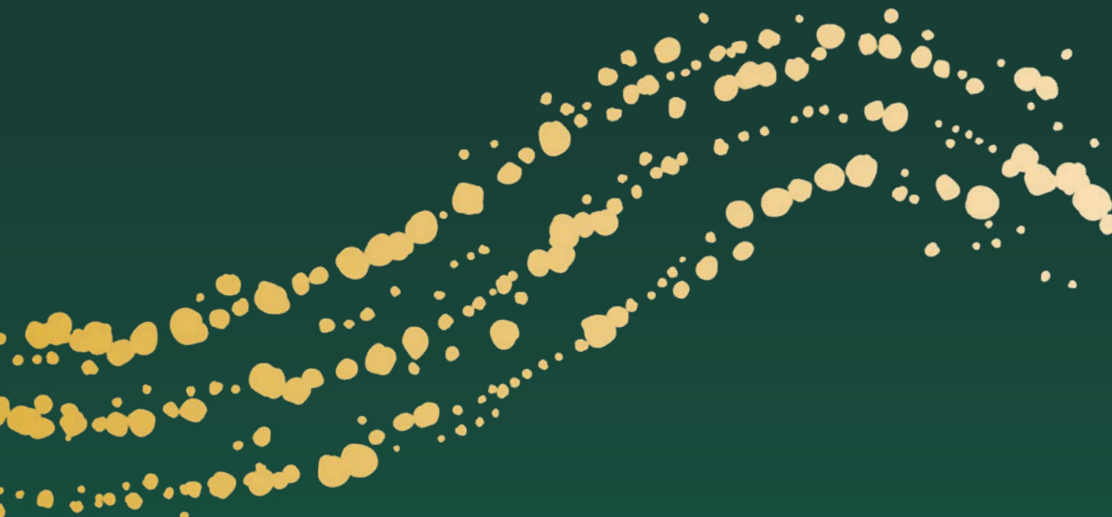
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