

Focus sur le Pérou et le secteur minier



Flanders
State of
the Art

Esthefani López
FIT LIMA

Mining sector: general overview



+11% of GDP



+60% of Peru's total exports



+20% FDI

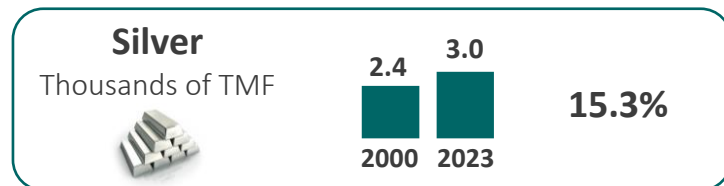
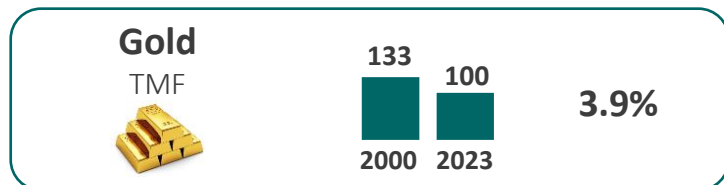
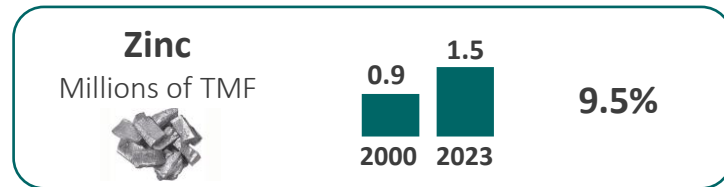
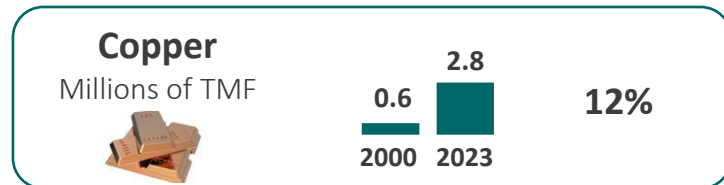


8 additional jobs are created for every direct job generated in mining



Mineral production

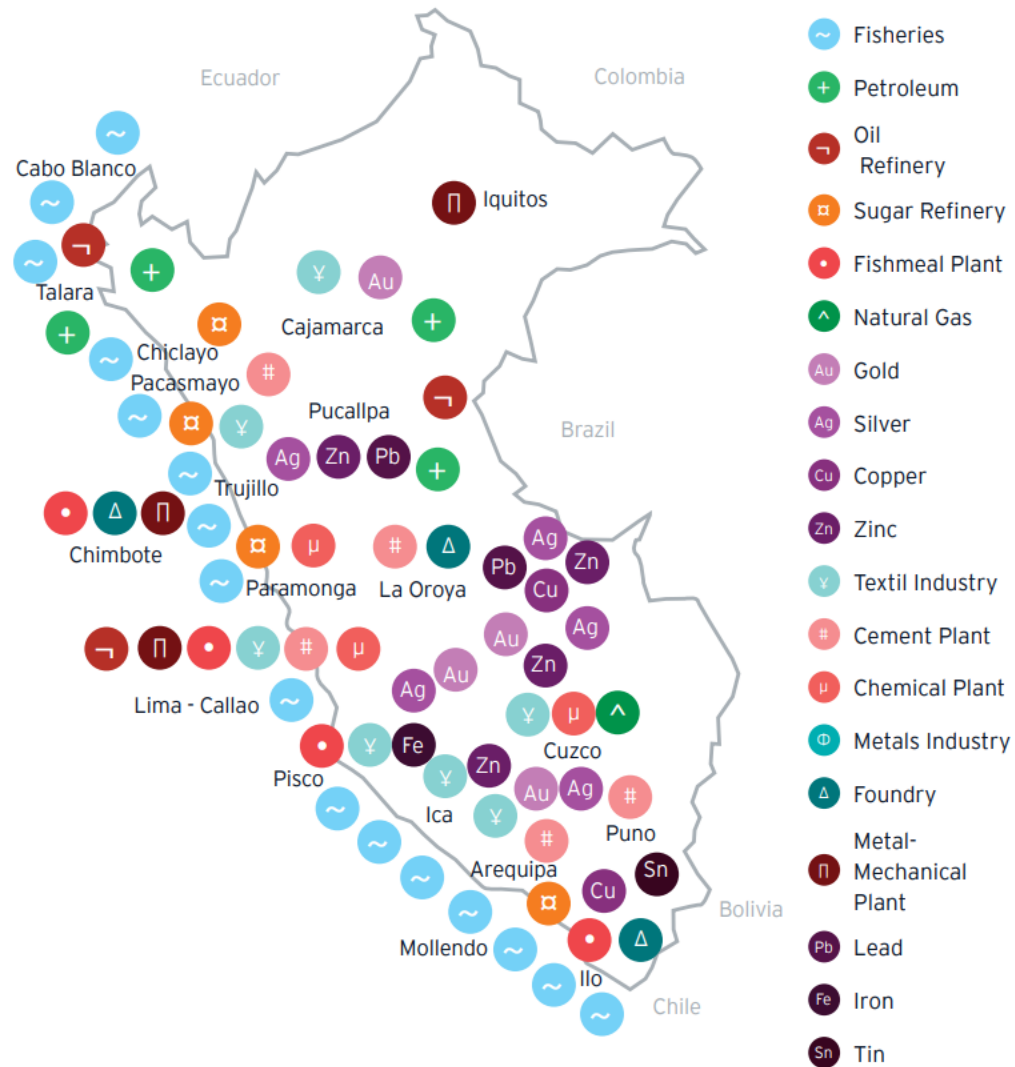
% World reserves



Peru's metal production ranking

| Ore | Latin America | World | Top positions in the world |
|------------|---------------|-------|--|
| Copper | 2 | 2 | Chile (1 st), Congo (3 rd) |
| Zinc | 1 | 2 | China (1 st), Australia (3 rd) |
| Gold | 2 | 11 | China (1 st), Australia (2 nd), Russia (3 rd) |
| Silver | 2 | 3 | Mexico (1 st), China (2 nd) |
| Tin | 1 | 4 | China (1 st), Burma (2 nd), Indonesia (3 rd) |
| Lead | 2 | 5 | China (1 st), Australia (2 nd), U.S. (3 rd) |
| Molybdenum | 2 | 3 | China (1 st), Chile (2 nd) |
| Mercury | 1 | 3 | China (1 st), Tajikistan (2 nd) |
| Cadmium | 2 | 8 | China (1 st), Republic of Korea (2 nd), Japan (3 rd) |
| Selenium | 1 | 9 | China (1 st), Japan (2 nd), Russia (3 rd) |

Mineral production



Mining activities are carried out in 1.5% of the national territory

Portfolio of mining projects

| | Projects | Total investment USD million |
|--|-------------|------------------------------|
| Portfolio of mining investment projects | 51 projects | 54 556 USD million |
| Portfolio of mining exploration projects | 75 projects | 644.2 USD million |

Mining potential

Project portfolio (USD 54 billion = 51 projects)

NORTE
40.5%
11 Proyectos

US\$ 22 074 millones

CAJAMARCA
LAMBAYEQUE
LA LIBERTAD
PIURA

CENTRO
15.3%
19 Proyectos

US\$ 8362 millones

ÁNCASH
AYACUCHO
HUANCAVELICA
ICA
JUNÍN
LIMA
PASCO
HUÁNUCO



ORIENTE
0.4%
1 Proyecto

US\$ 214 millones

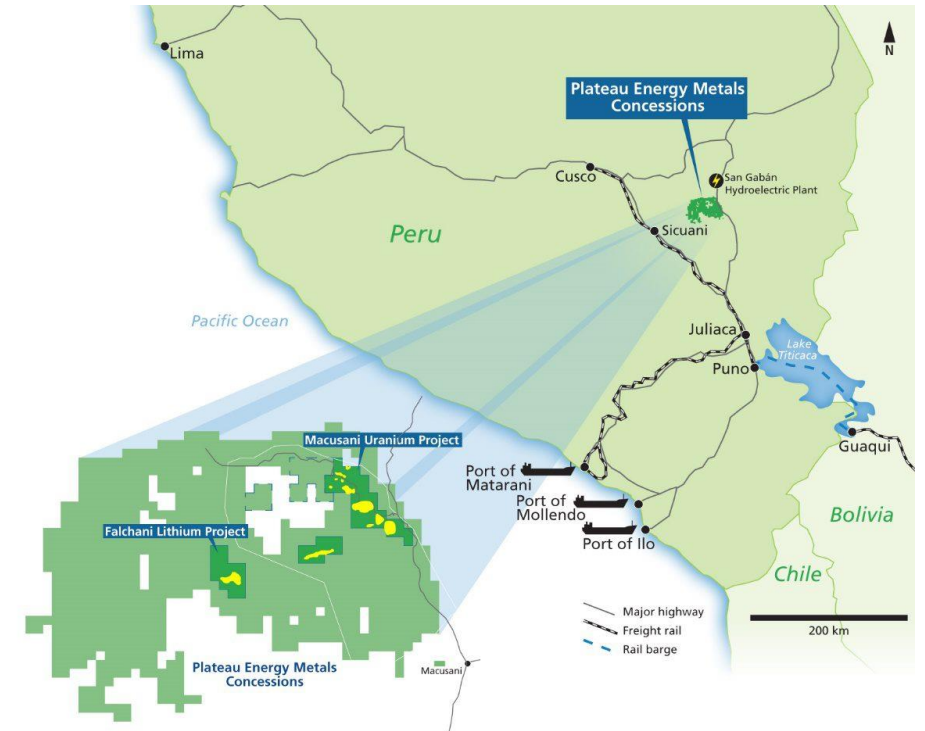
AMAZONAS

SUR
43.8%
20 Proyectos

US\$ 23 906 millones

APURÍMAC
AREQUIPA
CUSCO
MOQUEGUA
PUNO

What about lithium?



Falchani (Puno) is the first Li mining project in Peru. According to geological studies, it is the 6th largest hard-rock lithium deposit in the world

Mining ecosystem

Mining companies



Authorities:

Administrative (MINEM, INGEMMET, MINAM, ANA, SENACE, etc.)
Supervisors (OSINERGMIN, OEFA, etc.)

Business and professional associations:

SNMPE - CONFIEP
IIMP - Soc. Geológica
CIP - CIL - Amautas mineros

Academy Universities
and technical institutes

Analysts and
specialized media

Specialized service
providers - Contractors

Suppliers of machinery,
supplies and equipment

Service providers and
consulting



Opportunities in the mining sector

- ✓ **Decarbonizing the mining sector.** Mining companies need to increase their share of renewable energy in their current electricity mix
- ✓ Opportunity to **adopt new technologies** to close a significant portion of that gap
Global copper demand: 36.6 million mt by 2031 *
Supply gap: 6.5 million mt (17.8%)
- ✓ Peru has huge (critical/strategic) **energy-transition** metal resources/reserves that needs to be commercialize in an environmentally and socially responsible way
- ✓ Companies need **sustainable extraction, processing and refining technologies**
- ✓ The **remediation of environmental mining liabilities (EML)** has become a crucial issue in the context of mining in Peru



**FLANDERS
INVESTMENT
& TRADE**

ESTHEFANI LÓPEZ

Head of Office

Flanders Investment and Trade

Embajada de Bélgica

Avenida Angamos Oeste

380 Miraflores, Lima, Peru

T [+51 920 493 103](tel:+51920493103)

E esthefani.lopez@fitagency.com

W www.investinlanders.com

¡Muchas gracias!