Water technologies and services for mining

Chile and Peru

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Understand the market through functions, payments and responsibilities

Abstraction or supply, conveyance, treatment, recovery and measurement address different needs. Engineering, commissioning and operation connect these functions. Plant capacity does not establish sales. Investment does not establish a contract available to a new supplier.

Chile provides broad evidence on copper-mining water and outsourced conveyance. Peru combines surface water, groundwater, urban reuse, transition/closure treatment and legacy-site remediation. The evidence does not support adding a homogeneous bilateral monetary market or ranking countries using incompatible magnitudes.

Useful questions are who needs each function, who contracts it, which payment is observed and what risk remains with each party. Manufacturers and integrators can distinguish channels and phases. Miners can compare scope. Analysts and investors can separate recurring business, construction and financing.

Two economic relationships that change the interpretation

1. Recovered volume may exceed avoided payment.

In an illustrative scenario, a minimum purchase commitment preserves part of the invoice even when external water use falls. Valuing all reuse at the average tariff overstates savings when that payment is unavoidable. Investment assessment requires minimum commitments, additional variable costs and final quality. This is not a claim about a specific observed contract.

2. Financing treatment may not confer plant control.

Comparing contractual structures shows that payer, owner, operator and integrator can be different actors. Reallocating cost changes cash exposure. Changing technology requires knowing who controls and authorizes intervention. The mechanism does not establish that a modification is commercially accessible to a new provider.

Before comparing	Relevant input
Water solutions	Equivalent quality and delivery point
Recovery versus purchase	Genuinely avoidable marginal payment
Transferable cost	Base, allocation and timing
Commercial access	Counterparty and actual buying status

Evidence and limits

The research combines original public sources, official statistics, operator reporting, supplier evidence and buyer registers. It separates observation, calculation, inference and scenario. Cases are selected deliberately and do not statistically represent all purchases or suppliers.

References for checking the foundations

Cochilco, water consumption 2025. Sector report. See S01 and locators in the full study.
https://www.cochilco.cl/

INEI, environmental statistics. Mining surface water2024 and groundwater2023 cannot be added into a contemporaneous total.
https://www.inei.gob.pe/

Codelco, awarded tenders. An award and published term do not establish an open bid or continuous execution.
https://www.codelco.com/licitaciones-adjudicadas

AMSAC, Quiulacocha. Earlier memorandum on retained plant/control and transferable costs. Not the definitive agreement.
https://www.amsac.pe/wp-content/uploads/2026/07/Resumen-Memorando-Quiulacocha.pdf

The complete edition

Includes the six-line country map, cases and business mechanisms, economic reconciliations, locatable references and an editable assumption-based workbook. Explore minimum payments, utilization, recovery and cost allocation. No complete monetary TAM, market shares, national margins, open tenders, business outcomes or continuous monitoring are promised.

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