INTERGOVERNMENTAL FORUM
on Mining, Minerals, Metals and
Sustainable Development

COUNTRY PROFILE

Chile

POPULATION
19.76 million

TOTAL AREA
756,102 km²

CAPITAL
Santiago

GDP
USD 330 billion (2024)

IGF MEMBER

1. Geological Considerations

1.1 Mining-Specific Scorecard

Published critical mineral strategy and/or strategic plan[A]
2026
Yes

International coordination mechanisms (mining related, in force)[D]
2025
Multiple: United States (2026); European Union (2023)

Trade or export restrictions[E]
2025
Commodities: Copper, lithium

Mineral rents (% GDP)[F]
2021
Share: 16%

Logistics performance (1-5)[F]
2023
Score: 2.8

Electricity access (% of the population)[F]
2023
Score: 100

Internet access (% of population)[F]
2023
Score: 95

State-owned/affiliated mining company[B]
2025
Corporación Nacional del Cobre de Chile (codelco)

Extractive Industries Transparency Initiative (EITI) Membership[C]
2025
Yes

Source: [A]Chile Ministry of Mines, 2026; [B]Codelco, 2026; [C]Extractive Industries Transparency Initiative, 2025; [D]International Energy Agency, 2025b; [E]Organisation for Economic Co-operation and Development (OECD), 2025; [F]World Bank Open Data, 2025.

1.2 Reserves

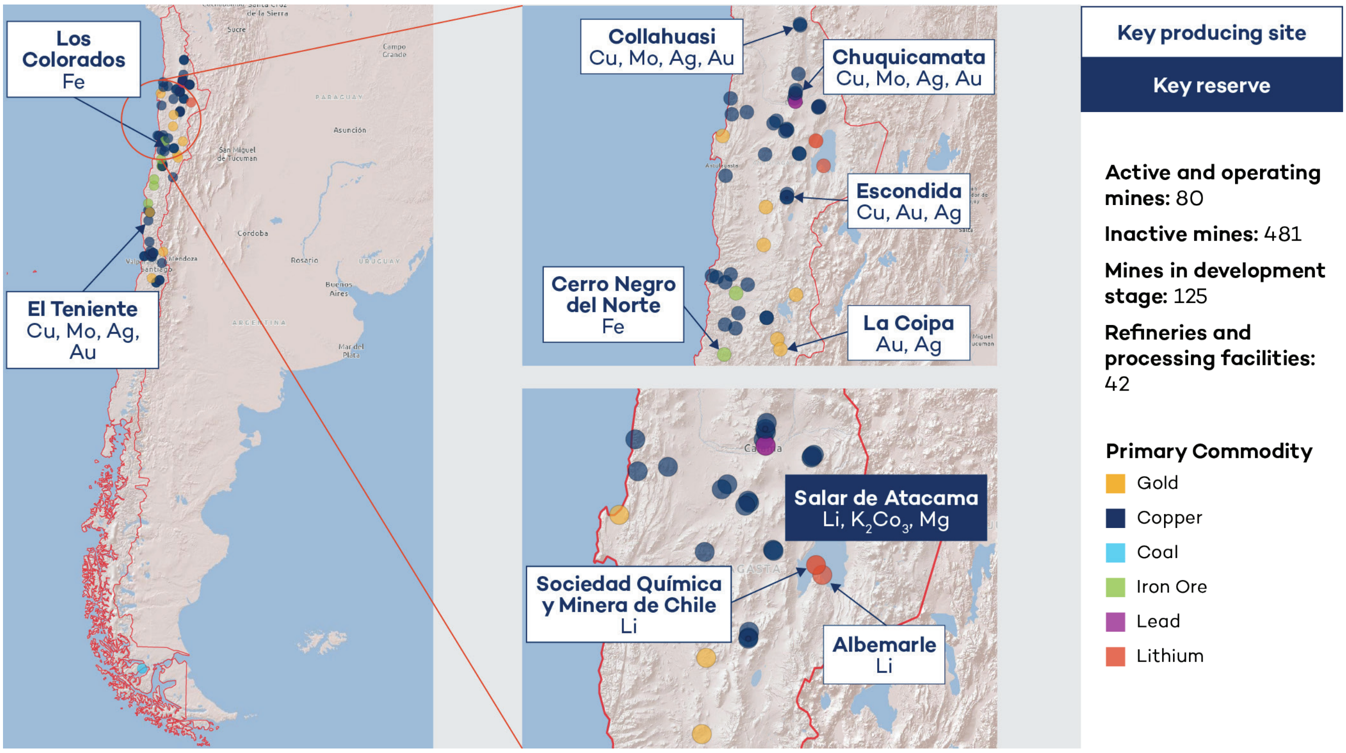
Reported key mineral reserves in Chile as of 2024

Commodity	Quantity (thousand metric tonnes, '000 mt)
Copper	180,000
Molybdenum	2,600
Iron ore	740,000
Silver	33
Lithium	9,200

Source: U.S. Geological Survey, n.d.-a.

1.3 Key Mining Regions and Producing Sites

Key mining regions and producing projects by commodity, 2025



Note: Points illustrated in the high-level map above represent only active and operational projects in Chile, as of January 2026, to allow for visualization.

Source: S&P Global Market Intelligence, 2026b.

1.4 Key Producing Sites

Key operational mining projects by commodity, Chile, 2024

Escondida
Main commodity: Copper
Global production share of primary commodity: 5.5%
Production (2024): 1,281,400 mt
Controlling companies: BHP Group, Rio Tinto Group, Mitsubishi Corp., JX Advanced Metals Corp., Mitsubishi Materials Corp.
Notable by-products: Gold, silver

Salar de Atacama (SQM)
Main commodity: Lithium
Global production share of primary commodity: 12.8%
Production (2024): 179,600 mt
Controlling companies: Sociedad Química y Minera de Chile
Notable by-products: Potash, potassium sulfate, magnesium

La Coipa
Main commodity: Gold
Global production share of primary commodity: 0.2%
Production (2024): 246,131 oz
Controlling companies: Kinross Gold Corp., Corporación Nacional del Cobre
Notable by-products: Silver

Collahuasi
Main commodity: Copper
Global production share of primary commodity: 2.4%
Production (2024): 558,636 mt
Controlling companies: Glencore plc, Anglo American plc, Mitsui & Co. Ltd., Mitsui Kinzoku Co.
Notable by-products: Molybdenum, silver, gold

Los Colorados
Main commodity: Iron ore
Global production share of primary commodity: 0.3%
Production (2024): 7,728,000 mt
Controlling companies: CAP S.A., Mitsubishi Corp.
Notable by-products: None

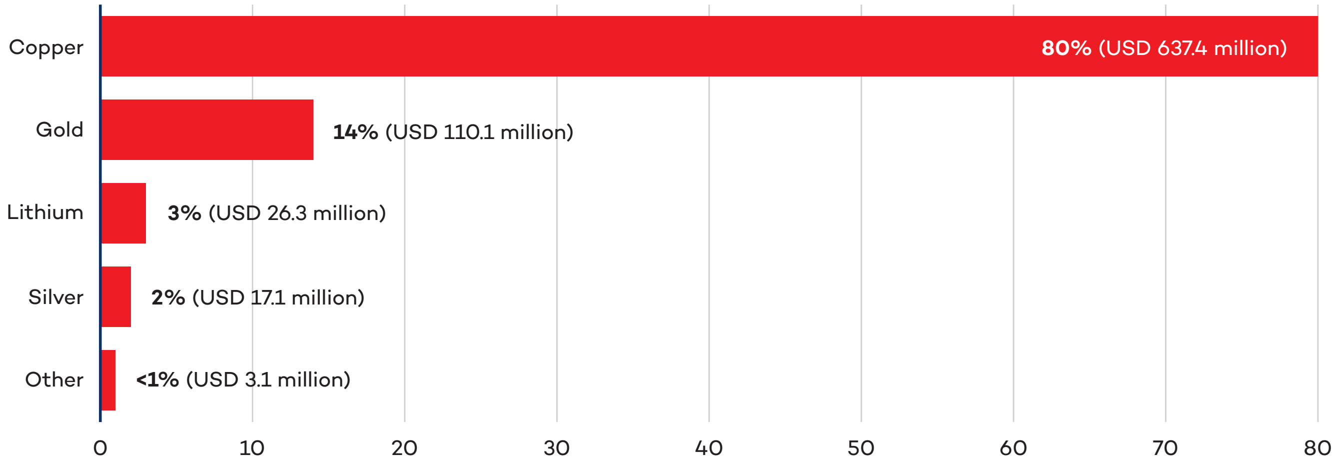
Salar de Atacama (Albemarle)
Main commodity: Lithium
Global production share of primary commodity: 4.9%
Production (2024): 69,000 mt
Controlling companies: Albemarle Corp.
Notable by-products: Potash

Chuquicamata
Main commodity: Copper
Global production share of primary commodity: 1.25%
Controlling companies: Corporación Nacional del Cobre
Production (2024): 289,000 mt
Notable by-products: Molybdenum, gold, silver, rhenium

Source: S&P Global Market Intelligence, 2026a.

1.5 Exploration

Exploration budget (USD million) and national exploration budget share per commodity (%) in 2024



Source: S&P Global Market Intelligence, 2026a.

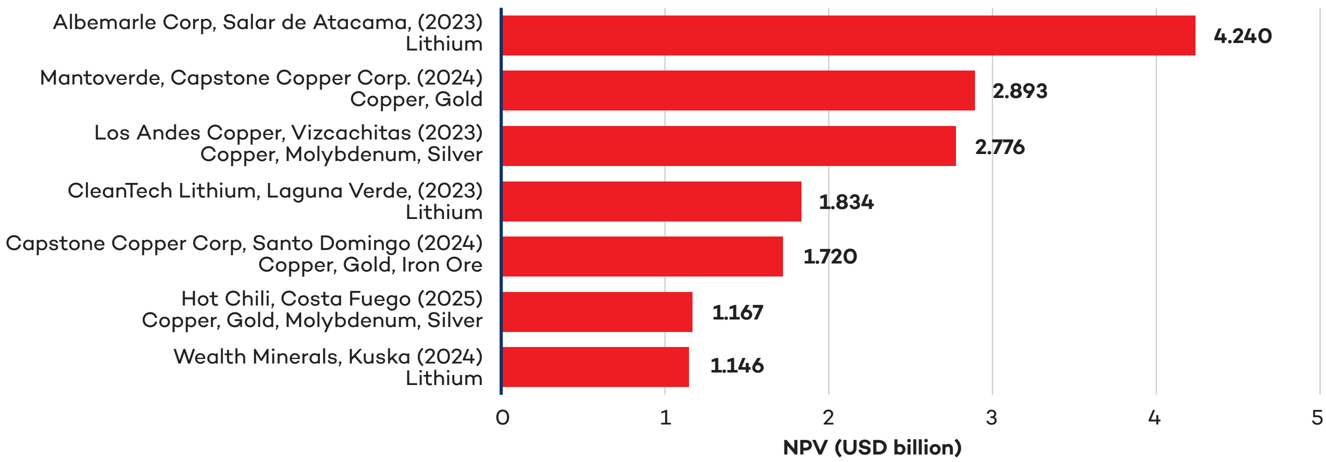
1.6 Artisanal and Small-Scale Mining

Artisanal and small-scale mining (ASM)

ASM represents a comparatively small segment of Chile's mining sector, with a recent study estimating 50,000 direct and indirect workers in the small-scale mining subsector and 11,500 to 50,000 miners in the artisanal mining subsector, although figures vary across commodities and mining regions. Concentrated around copper, gold, and silver, ASM activities are geographically concentrated in Chile's Norte Chico macrozone, particularly in Atacama (Region III) and Coquimbo (Region IV), reflecting the regional geology and the distribution of shallow, vein-type, and oxide mineralization that is amenable to low-capital extraction methods (Meller & Meller, 2021).

1.7 Top Five Development Projects by Net Present Value

Key development projects by estimated net present value (NPV) in Chile, 2020–2026, USD billion



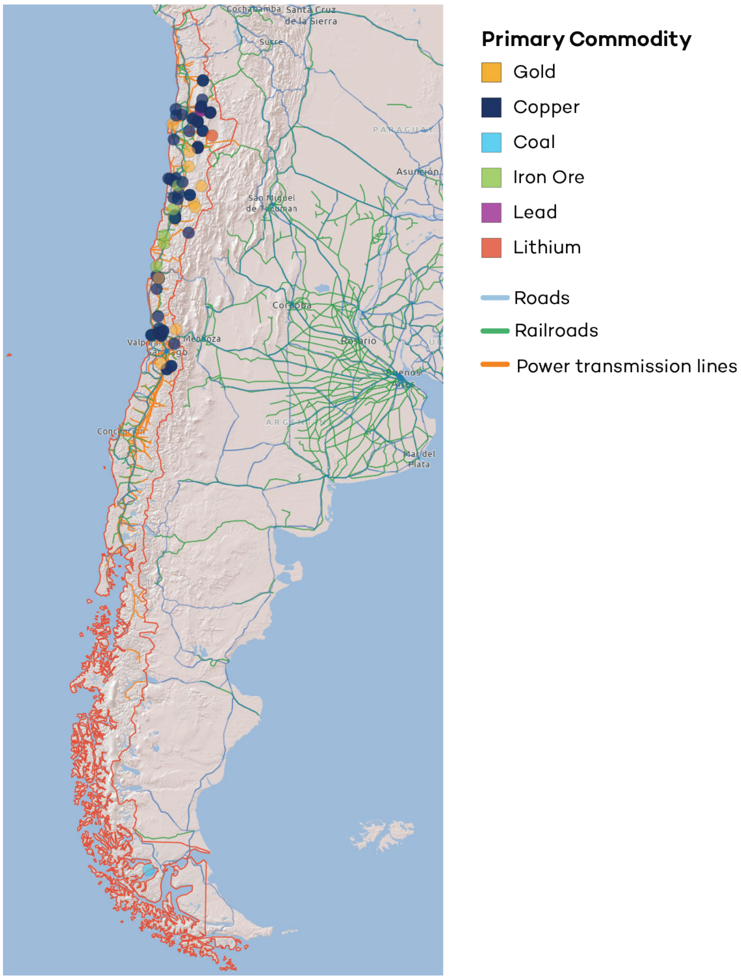
Methodological note: The bar chart above shows NPV (in USD million) of Chile's top development projects between 2020 and 2026. Only base case values (most likely set of assumptions, serving as the main reference scenario) are shown. For the reported NPV, if after-tax data is not available, the pre-tax value is reported. Key development projects include those at the preliminary economic assessment, prefeasibility, full feasibility, and mine plan stages.

Source: S&P Global Market Intelligence, 2026a.

2. Industrial Considerations

2.1 Mining, Infrastructure, and Energy Map, Chile (2025)

Mining, infrastructure, and energy map, Chile, 2025



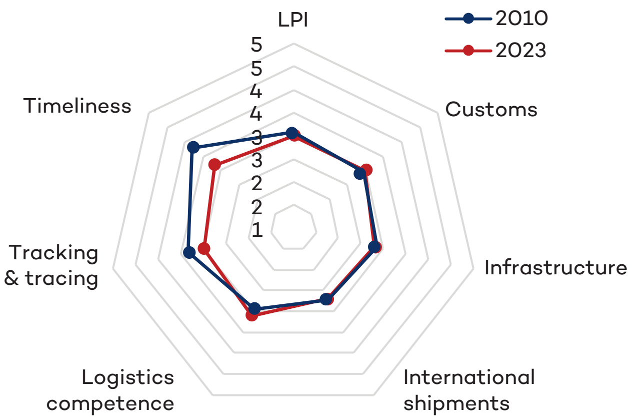
Source: S&P Global Market Intelligence, 2025b.

As shown in the map, Chile exhibits significant variation in infrastructure and logistics performance across its distinct regions, reflecting the high-altitude locations of copper mine sites and the associated logistics requirements. The central region has a high concentration of robust and well-developed critical infrastructure (railways, roads, and power transmission lines) concentrated around mining and processing activities and projects (OECD, 2023).

For the mining sector, strong connectivity is essential as it enables the cost-effective transportation of mined products from mines and processing facilities to international markets compared to other mining regions. Chile's copper and lithium mining infrastructure is highly concentrated in the Antofagasta region. Since less than 1% of production is consumed domestically, almost all minerals produced in the region are exported through four specialized deep-water mining ports including Angamos, Antofagasta, Coloso, and Mejillones (OECD, 2023).

2.2 Logistics Performance Index

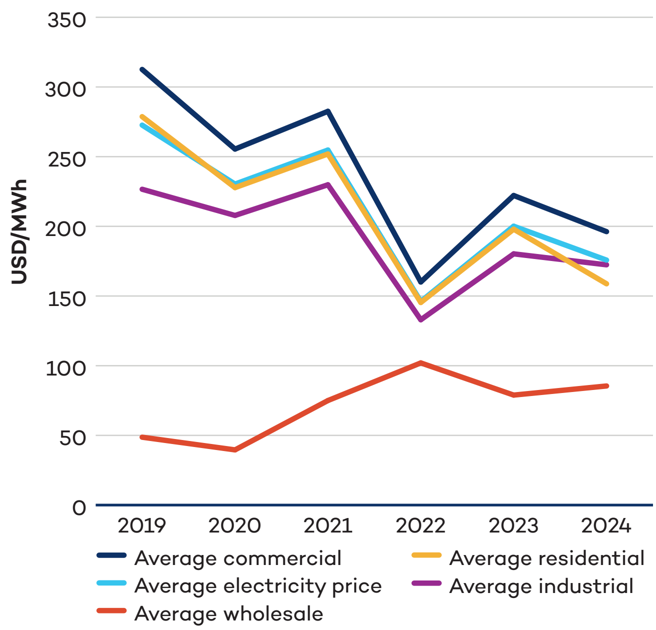
(i) Logistics performance index (LPI), 2010 versus 2023



Methodological note: *Radial Chart showing LPI breakdown for Chile (ranked 1 = low and 5 = high), a composite measure disaggregated into six key dimensions: 1) Efficiency of the clearance process (i.e., speed, simplicity, and predictability of formalities) by border control agencies, including customs; 2) Quality of trade and transport related infrastructure (e.g., ports, railroads, roads, information technology); 3) Ease of arranging competitively priced shipments; 4) Competence and quality of logistics services (e.g., transport operators, customs brokers); 5) Ability to track and trace consignments; 6) Timeliness of shipments in reaching destination within the scheduled or expected delivery time (World Bank Open Data, 2025).*

Source: World Bank Open Data, 2025.

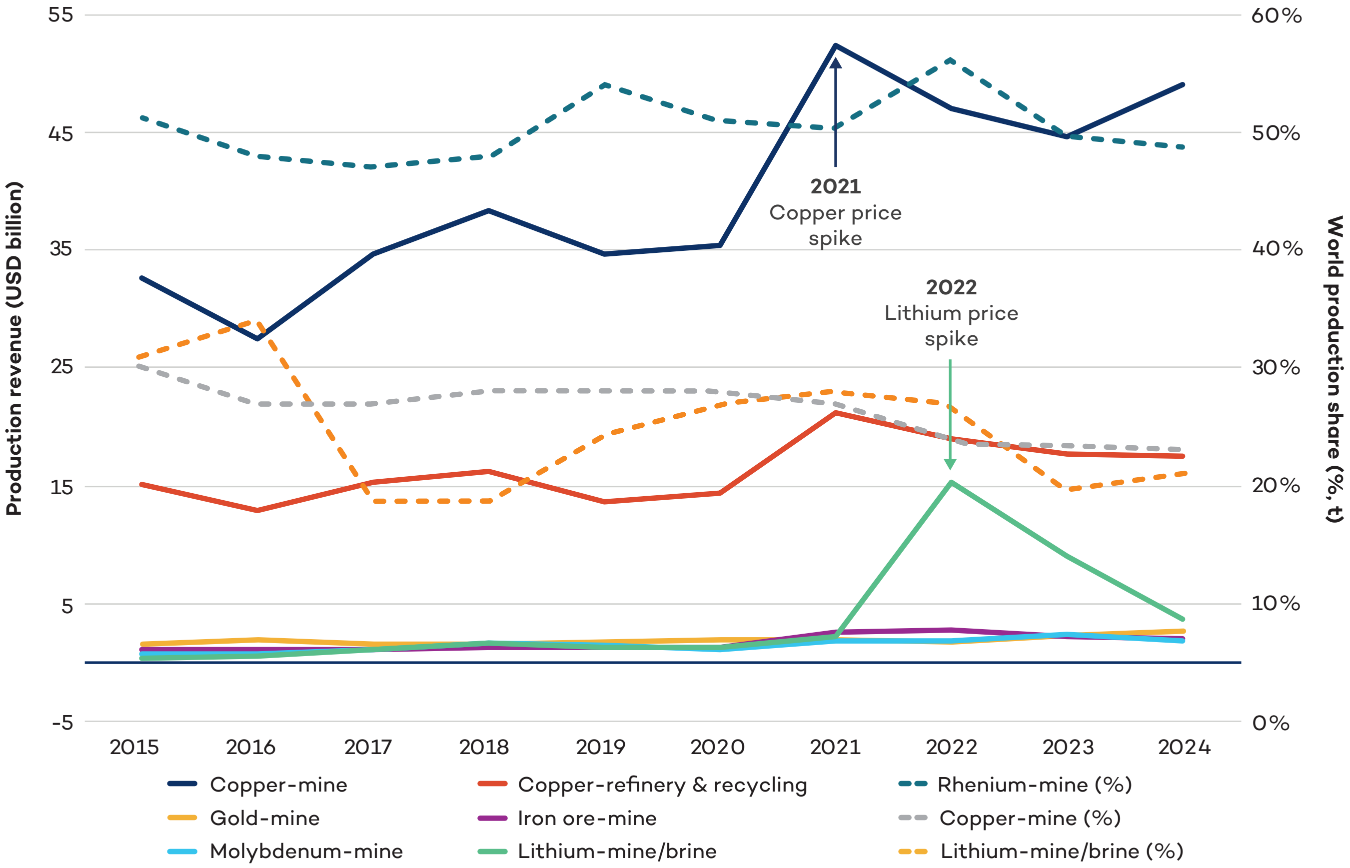
(ii) Chile electricity prices in USD/megawatt hour (MWh), 2017–2024



Source: Climate Watch, 2025; Global Climate Scope, 2025.

2.3 Mining and Refining Evolution

Chile's top revenue-producing commodities (USD billion) & world production share (% by metric tonnes)



Source: U.S. Geological Survey, n.d.-a; n.d.-b.

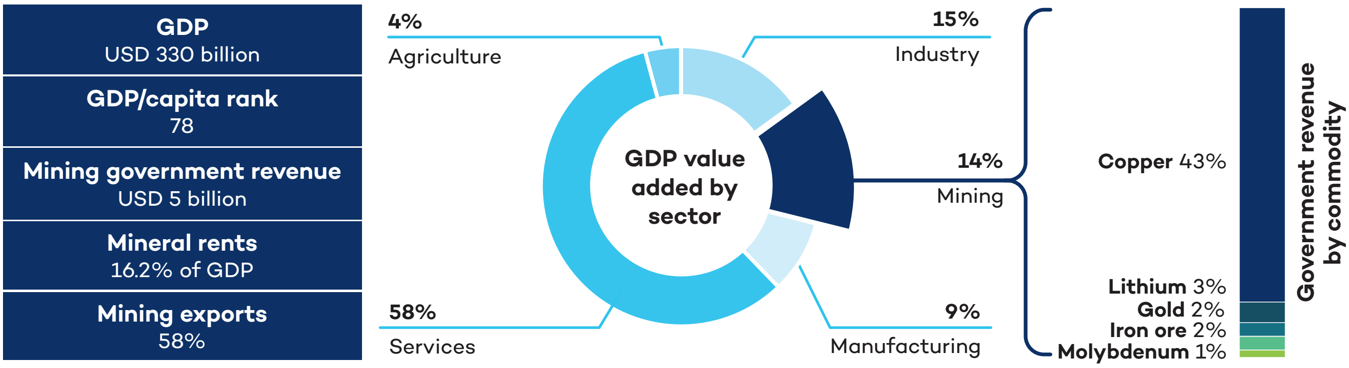
Methodological note: *The left axis on the graph above shows the revenue generated by production of selected commodities in USD billion. This is calculated as the average annual price times annual country-level production. The right axis shows the country's share of world production for selected commodities.*

Copper production revenue peaked in 2021, and lithium in 2022. This was due to a combination of increased production and price increases from 2021 through 2023, caused by supply disruptions from the COVID-19 pandemic, the Russian invasion of Ukraine, and fraying globalized supply chains, which collided with the increasing demands of economic recovery. Aside from a decline in Chile's share of global lithium production between 2016 and 2018, driven mainly by increased production from Australia, the country's share of global production for rhenium, copper, and lithium (from 2018 onwards) has remained broadly stable.

3. Economic Considerations

3.1 Sectoral Contribution

Chile GDP by sector and government revenue from mining by commodity (excluding oil and gas), 2024



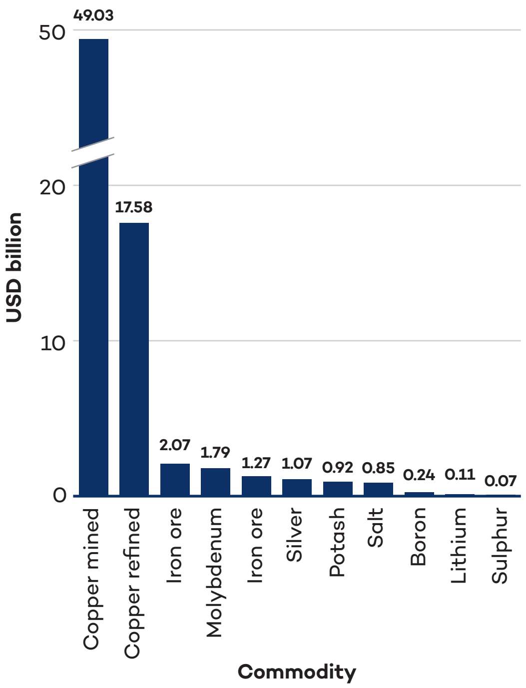
Source: Ernst & Young, 2025; U.S. International Trade Administration, 2023; World Bank Open Data, 2025.

Methodological note: *The data to the far left of the donut graph covers GDP, GDP per capita world ranking, total estimated government revenues from mining, and mining as a share of total exports. The middle figure presents each sector's share of GDP, with the mining and mining sector highlighted in yellow. The right-most figure estimates each commodity's revenue contribution to the mining sector.*

Relative to other developed countries, mining makes up a significant share of Chile's economy, up to 14% (World Bank Open Data, 2025). Chile's mining sector is dominated by Codelco, Chile's state-owned national copper corporation and the world's largest copper producer, operating seven mining divisions and four smelters within Chile (USGS, n.d.-a). This copper production also results in significant by-production of gold and molybdenum, while rhenium is recovered mainly through the processing of molybdenum concentrates associated with Chile's copper-molybdenum deposits. Despite being the world's largest copper miner, Chile's copper refining industry is dwarfed by China's and was recently surpassed by the Democratic Republic of Congo. Given the enormous quantities of copper ore that Chile exports, value addition from further smelting and refining may present an opportunity for the country (USGS, n.d.-b, n.d.-c).

3.2 Mined Production Value for Selected Commodities

Estimated production value of selected commodities (USD billion), 2024



Source: U.S. Geological Survey, n.d.-a, n.d.-c.

3.3 Trade and Export Restrictions

Summary of mining-related trade and export restrictions, 2025

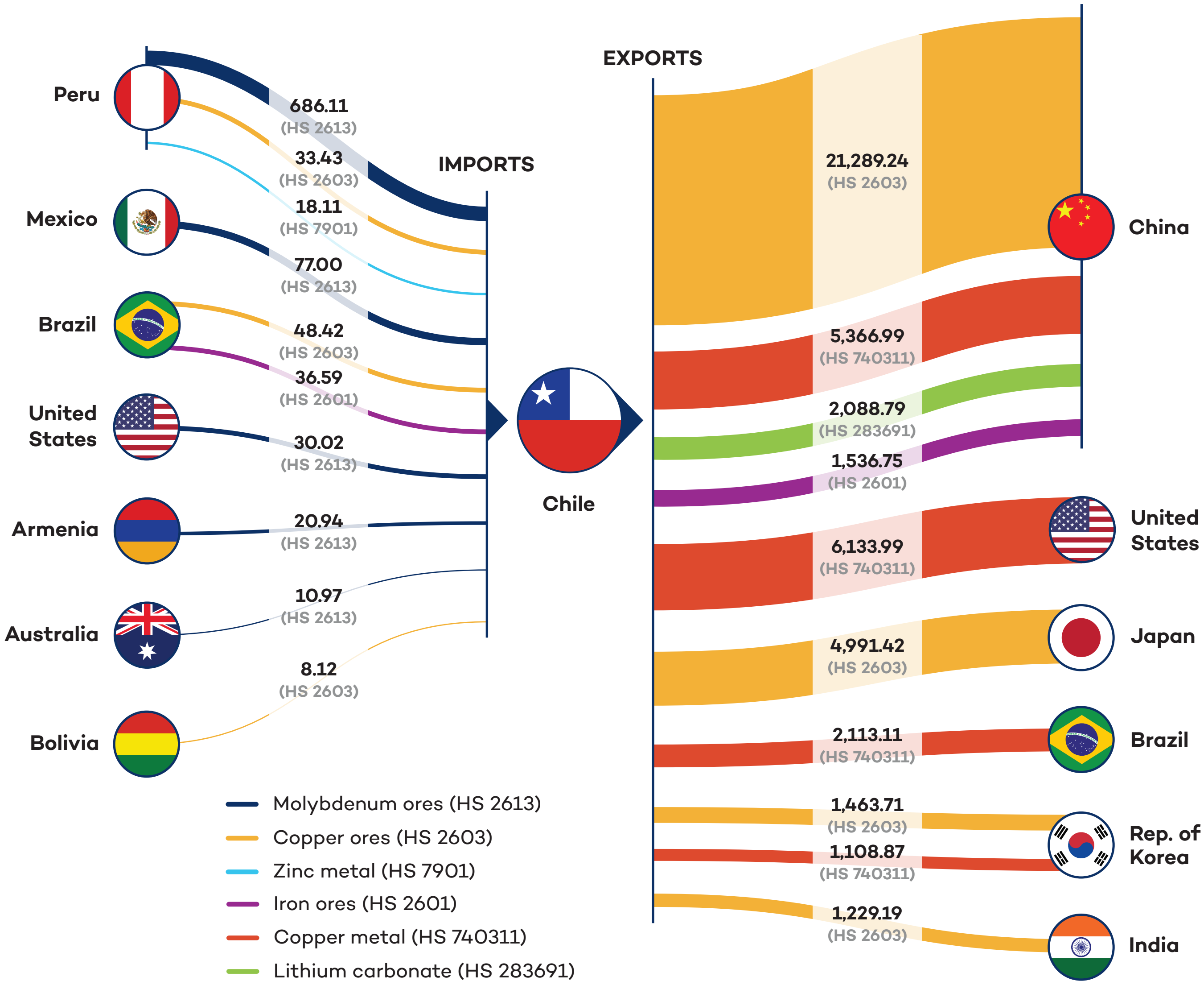
	Export restriction type (most restrictive)			
	Export prohibition	Export quota or tax	Licensing requirement	No restrictions
Copper			x	
Iron ore				x
Silver				x
Potash				x
Salt				x
Boron				x
Lithium			x	

Source: OECD, 2025.

Chile plans to nationalize its lithium industry, though it has not imposed export restrictions. It has implemented some policies to promote domestic value addition, such as its National Lithium Strategy, which mandates public partnerships and majority stakes with a set share for domestic lithium companies to process lithium locally (USGS, n.d.-c). The EU-Chile Advanced Framework Agreement (2023) stipulates the need to avoid export monopolies for raw materials and instead promote regional investment and strategic development (OECD, 2025).

3.4 Major Selected (non-fuel) Mining Trades

Major selected mining trades (excluding oil and gas) in Chile, 2024 (USD million)



Source: United Nations Statistics Division, 2026.

The figure above shows Chile's exports and imports for 2024 by value. China accounts for roughly two thirds of Chile's major mining sector exports, chiefly for mined and refined copper, with relatively smaller values for lithium and iron ores. Present copper metal exports to the United States are not subject to the recent 50% U.S. Section 232 national security tariffs on copper products, which apply more to semi-finished products, such as pipes, cables, and electrical equipment (BNAmericas, 2025).

4. Environmental, Social, and Governance Considerations

4.1 Environmental

4.1.1 Environmental Scorecard

Environmental

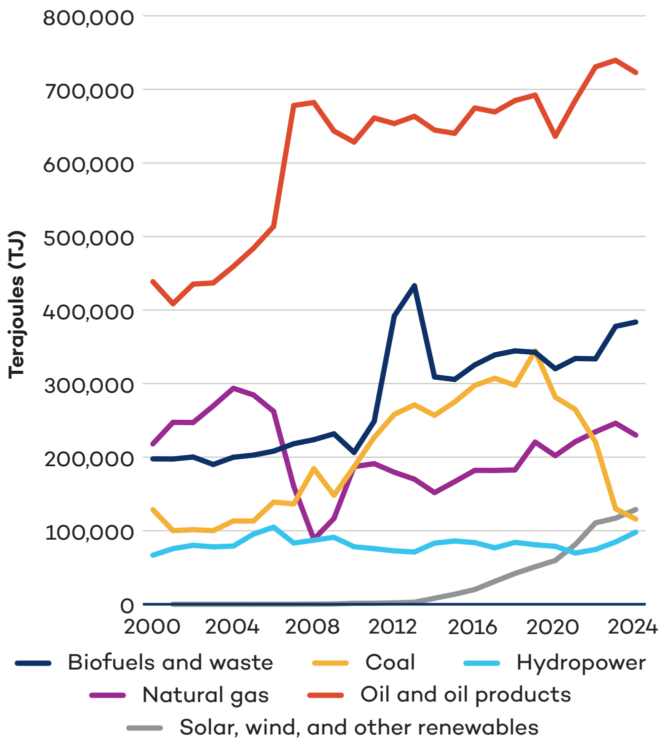
Indicator	Year	Score	% change
Annual greenhouse gas emissions[A] (million mt CO_2e) (including LULUCF*)	2000 2023	50.73 102.71	↑ +102%
Energy sector emissions[A] (million mt CO_2e)	2000 2023	51.76 75.97	↑ +47%
Industry/IPPU GHG emissions**[A] (million mt CO_2e)	2000 2023	1.74 5.10	↑ +193%
Industrial energy intensity[B] (terajoules)	2000 2024	33 36	↑ +9.09%
Renewables[B] (% of total consumption)	2000 2024	31 24	↓ -23%
Tree cover loss[C] (kilohectares (kha)/year)	2001 2023	73 48	↑ +34%

Sources: [A]Climate Watch, 2025; [B]IEA, 2025b; [C]Global Forest Watch, 2025.

**LULUCF = Land use, land-use change, and forestry; ** IPPU = Industrial processes and product use.*

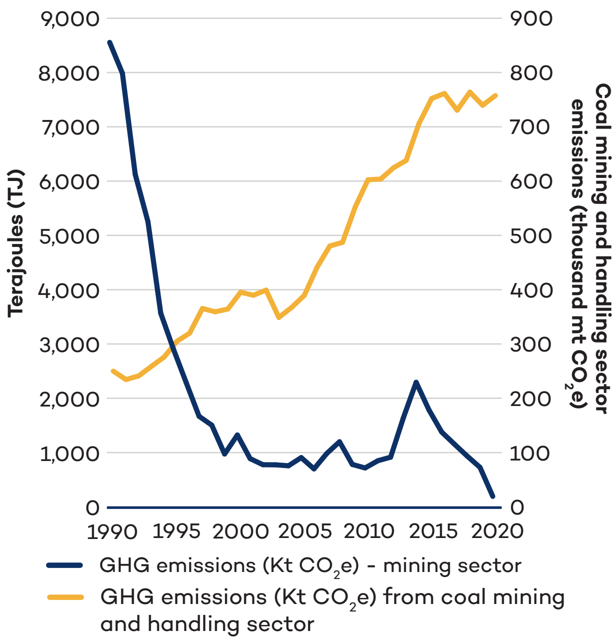
4.1.2 Emissions and Energy Mix Overview

(i) Evolution of total energy supply by source (terajoules, TJ), 2000–2024



Source: IEA, 2024a; Climate Watch, 2025.

(ii) GHG emissions from the mining & quarrying sector 1.A.2i versus coal mining and handling sectors (1.B.1A) in Chile between 1990 and 2020



Source: UNFCCC, 2025, adapted from Intergovernmental Forum on Mining, Minerals, Metals and Sustainable Development (IGF), 2024.

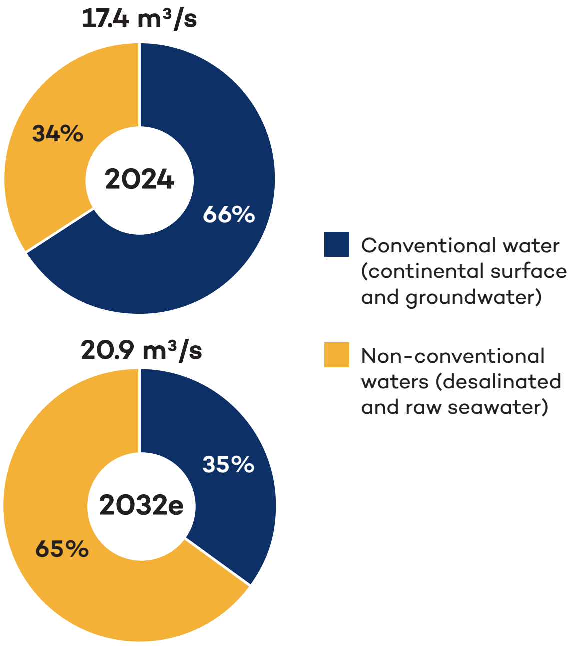
Climate Watch data estimates Chile's GHG emissions at 106.72 million mt in 2020, representing 0.10% of global emissions (Climate Watch, 2025). Nationally, the mining industry is responsible for 15.3% of Chile's overall energy consumption, translating to 21% of diesel consumption and 34.1% of electricity in 2022 (IGF, 2024). Some mining processes, notably those carried out for lithium brine processing and copper cathode production, are particularly energy intensive. In copper mines, core drivers can also be attributed to increased diesel consumption, machinery and heavy trucks used for the extraction and transportation of ores and mining products (IGF, 2024).

Relative to other mining regions, energy consumption in Chile's Antofagasta mining projects is particularly high due to the region's hyper-arid climate, which severely constrains the availability of local freshwater resources. As a result, mining operations are heavily reliant on seawater supply, requiring energy-intensive desalination, treatment, and long-distance pumping from coastal facilities to high-altitude mine sites that often exceed 3,000 metres above sea level (IGF, 2024). Nevertheless, supported by significant solar and wind resource potential, Chile has made substantial progress in decarbonizing the mining sector, with 14 renewable energy projects operating in the Antofagasta region and approximately 44% of regional electricity supply now sourced from renewables (OECD, 2023).

4.1.3 Water Intensity

4.1.3.1 Water Footprint Comparison Across Commodities

(i) Copper water demand



Source: OECD, 2023.

The Chilean mining industry is a major water user, particularly in the hyper arid Antofagasta and Salta provinces, which has an annual renewable freshwater availability of approximately 52 m³ per capita per year (Chacana-Olivares et al., 2024). In Chile's Salar de Atacama, lithium extraction accounts for an estimated 57% of local water consumption, or roughly 1,892,705 litres (or 500,000 U.S.gallons) per metric tonne of lithium produced. This approximation is largely attributed to conventional brine extraction via evaporation; actual water usage varies considerably across projects and processing technologies (Link et al., 2025; Marionova et al., 2025). In Antofagasta, water demand from copper mining is estimated at 17.6 m³/s and projected to rise to 20.9 m³/s by 2032, with about two thirds sourced from continental water and the remainder from seawater (OECD, 2023).

(ii) Mining and regional water use

REGIONAL IMPACT

ANTOFAGASTA	NATIONAL LEVEL
50%–65% of total regional water withdrawals comes from mining	**~3%** of total national water withdrawals comes from mining

COPPER'S ROLE

90% of mining-related water demand in the region is from copper mining and processing

EXTREME WATER SCARCITY

52 m³ of renewable fresh water available per capita per year

Source: IGF, 2021; OECD, 2023.

Mining in Antofagasta accounts for roughly 50%–65% of regional water withdrawals, compared to about 3% nationally, with copper representing 90% of this use (IGF, 2021; OECD, 2023). As a result, the sector is increasingly reliant on desalinated and raw seawater, with seawater use projected to rise from 41% in 2024 to up to 68% by 2034 as new desalination projects come online (Lubuzh et al., 2024; OECD, 2023).

Against the backdrop of climate change, mining sector water intensity is expected to increase due to higher production, declining ore grades, a growing shift toward sulphide copper ores that require more water-intensive processing, and the emergence of low-CO_2-emission hydrogen projects. (COCHILCO, 2021; OECD, 2023). Despite progress, the region may not meet national mining policy targets limiting continental water use to 10% by 2030 and 5% by 2040. Beyond desalination, further efficiency gains could come from improved process optimization and greater water recirculation and reuse (Aitken et al., 2016; IGF, 2021; Ministerio de Minería, 2020; Stella et al., 2023).

4.2 Social

4.2.1 Social Scorecard

Social

Indicator	Year	Score
Gini Index[H] (0–100)	2023	46.9
Prevalence of undernourishment[D] (%) (3-year av.)	2024	2.5
Representation of female staff in mining[F] (%)	2023	10
Total workforce[E] (direct only)	2021	176,500
Resilience index[G] (0-100)	2023	52

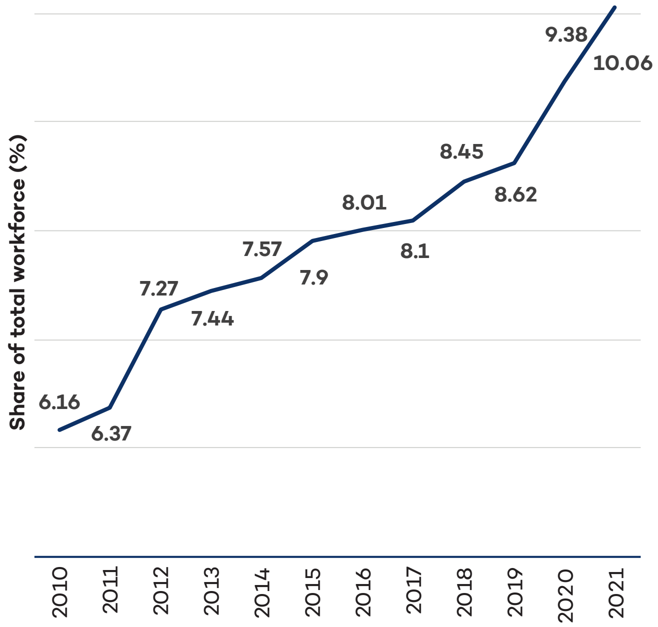
The Gini Index measures income (or consumption) inequality, ranging from 0 (perfect equality) to 100 (perfect inequality), with higher values indicating greater inequality.

Normalized score is a 0–100 country percentile ranking across all countries covered by the aggregate indicator, where 0 corresponds to the lowest rank and 100 to the highest.

Sources: [D]Food and Agriculture Organization of the United Nations (FAO), 2025; [E]Consejo de Competencias Mineras & Eleva, 2021; [F]IGF, 2021; [G]Lloyd's Register Foundation, n.d.; [H]World Bank Open Data, 2025.

4.2.2 Gender and Social Inclusion

(i) Women's participation in Chile's mining workforce (2010–2021)



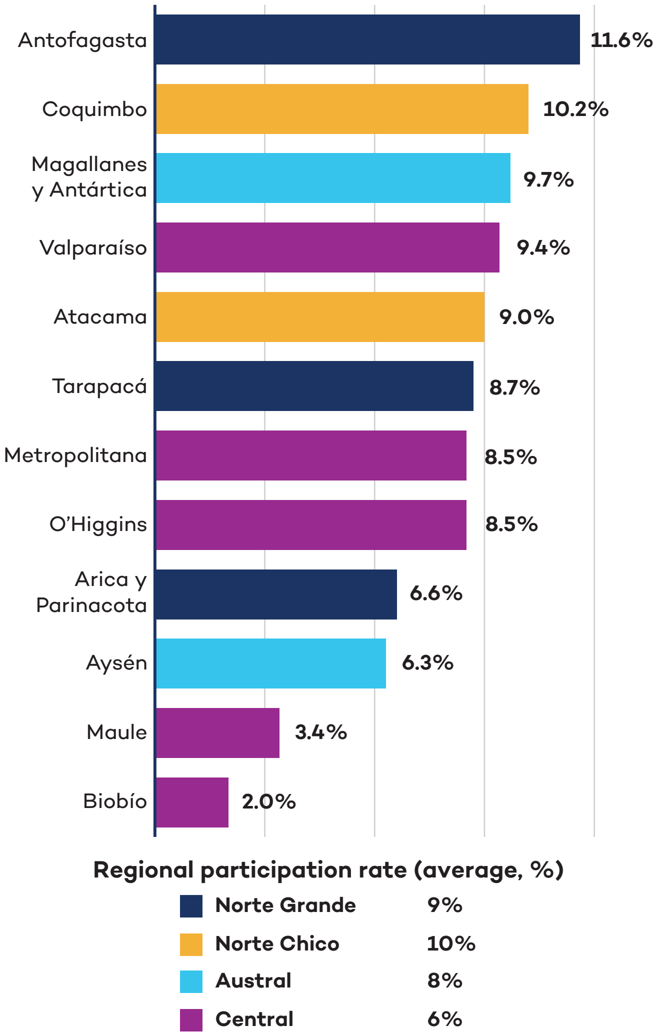
Source: IGF, 2021.

Average rate of women's participation based on the type of mining activity (%)

	Small	Medium	Large
2018	5.57	8.78	8.49
2019	5.57	9.26	8.63
2020	5.75	9.95	9.72
2021	6.31	10.58	10.19
Average participation (%)	5.8	9.64	9.26

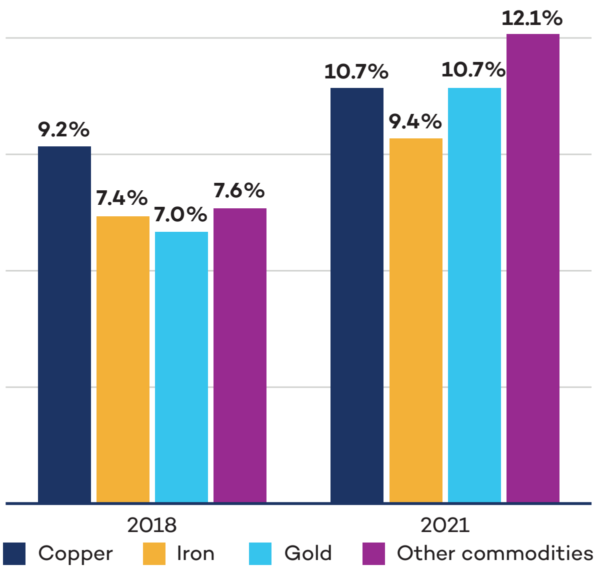
Source: IGF, 2021.

(ii) Women's participation in mining workforce by province (%) vs total regional rate, 2021



Source: IGF, 2021 - Estimates based on information obtained from SERNAGEOMIN.

(iii) Percentage of women's participation in mining workforce by region vs total regional rate (%), 2021



Source: IGF, 2021. Estimates based on information obtained from SERNAGEOMIN..

Mining is a significant source of employment in Chile, accounting for around 3% of the national labour force. Nevertheless, women's participation in Chile's mining sector remains low, with just a 10% participation rate compared to Canada's 18% (Winkler, 2023). Regionally, 84.2% of female workers in Chile's mining sector are employed in Chile's Norte Grande and Norte Chico, which contain most of the mining activities in Chile and 81.9% of the country's total mining workforce (IGF, 2021). At the provincial level, the highest women's participation rates are found in Antofagasta (11.6%) and Coquimbo (10.2%), and lowest in Maule (3.4%) and Biobio (2.0%) (IGF, 2021).

Across occupations, women are primarily employed as geologists (23%), followed by mining site professionals (10%), with only a small percentage as maintenance supervisors (4%), as well as mechanical and electrical engineering roles (2% and 4%) (IGF, 2021)

4.3 Governance

4.3.1 Governance Scorecard

Governance

Indicator	Year	Score
Political stability & violence[H] (0 - 100)	2023	50.2
Rule of law[H] (0 - 100)	2023	71.2
Voice & accountability[H] (0 - 100)	2023	70.9
Control of corruption[H] (0 - 100)	2023	80.7
Regulatory quality[H] (0 - 100)	2023	76.9
INFORM Disaster Risk Reduction Index[I] (0-10)	2026	3.3

Normalized score (0-100) indicated as a country percentile rank among all other countries covered by the aggregate indicator, with 0 corresponding to the lowest rank and 100 the highest.

INFORM Risk Index (0-10) is a composite indicator that identifies countries at risk of humanitarian crisis and disaster that would overwhelm national response capacity. 0 indicates no risk, 10 indicates extremely high risk.

Sources: [I]European Commission, 2025; [H]World Bank Open Data, 2025.

4.3.2 Regulatory Overview

Overview of Chile's mining policy and regulatory landscape

Type of legal system	Civil law
Main regulatory authority	Ministry of Energy and Mines
Mining code or primary legislation	Mining Code (Law No. 18, 248); Law No. 18.097 on Constitutional Organic Law on Mining Concessions; Act No.19, 300 General Environmental Framework
Legal provisions for Indigenous or local community rights	Title V of Decree No.40-2013 sets out provisions for Indigenous consultation. Public participation and consultation established in Act No.19, 300 as part of an environmental impact assessment process.
Environmental impact legislation	Act No. 19.300, General Environmental Framework Decree No.40-2012, Regulation of the Environmental Impact Assessment System. Ministry of Environment

Source: IGF, forthcoming.

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