

PART 1: INDUSTRY STRUCTURE (Aggregates & Mining)

1.1 What We Actually Do

We do not “serve mining.”

We perform:

“Aerial inventory measurement and volumetric reporting for outdoor bulk materials.”

Mining & aggregates just happens to be the best-fit vertical.

Core Function:

- Capture aerial imagery
- Generate 3D surface models
- Calculate volumes
- Provide cut/fill comparisons
- Deliver audit-ready reporting

Everything else is industry context.

1.2 The Mining & Aggregates Ecosystem

A. Metals Mining (Not Our Focus)

- Gold, copper, iron ore
- Massive open pits
- Benches, haul roads, highwalls
- Rare in Texas
- Highly engineered, global operators

Status: Opportunistic, not primary.

B. Coal Mining (Declining Sector)

- Strip mining
- Draglines
- Massive earth movement
- Regulatory decline

Status: Low priority.

C. Construction Materials (PRIMARY FOCUS)

This is where we dominate.

It includes:

- Crushed Stone (Quarries)
- Sand & Gravel (Dredge or excavated)
- Lime/Cement
- Terminals
- Ready Mix (Batch Plants)
- Asphalt Plants
- Concrete Recyclers

This entire chain touches the same materials multiple times.

That's the key insight.

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