



State of the industry - Coal Mining

Coal Mining's workforce has shown a decline in female participation in recent months.

Employment levels have remained relatively stable over the past decade, compared with other industries, and were less affected during the pandemic. Female representation increased from 8.2% in 2015 to 18.3% in 2024. However, it has declined in 2025, falling back to 7.8% in the November 2025 quarter (Figure M11). As this trend overlaps, or at least shares similarities, with trends in the (total) proportion of part-time workers, it could indicate that women were more likely to hold part-time roles that were not ongoing and/or conflicted with other responsibilities outside of work.

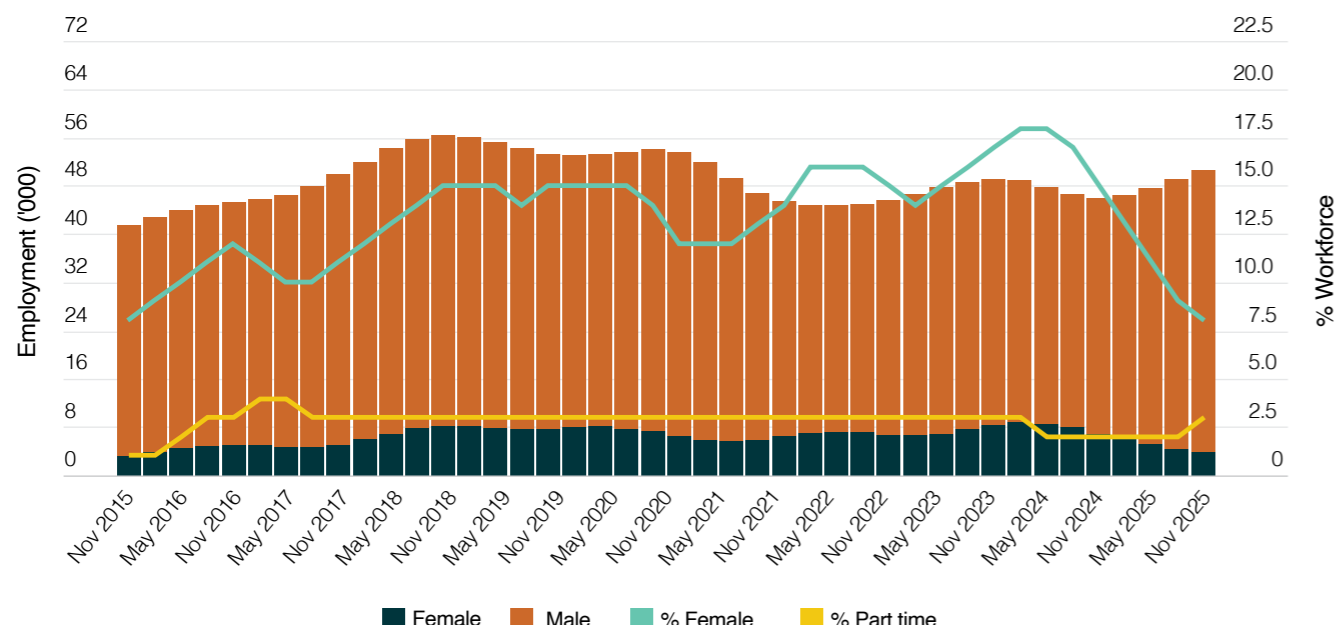
Queensland leads in employment in the Coal Mining industry.

New South Wales (NSW) accounts for around one-third (36%) of total Coal Mining employment (Figure M12). QLD tends to have the largest majority of employment (55.7%) and enrolments (70.9%) relevant to the sector. While the sector had a presence in almost all states and territories at different times, today it is concentrated in the Bowen-Surat basin in QLD and the Hunter region in NSW.

The Coal Mining sector makes a significant contribution to the energy and manufacturing sectors.

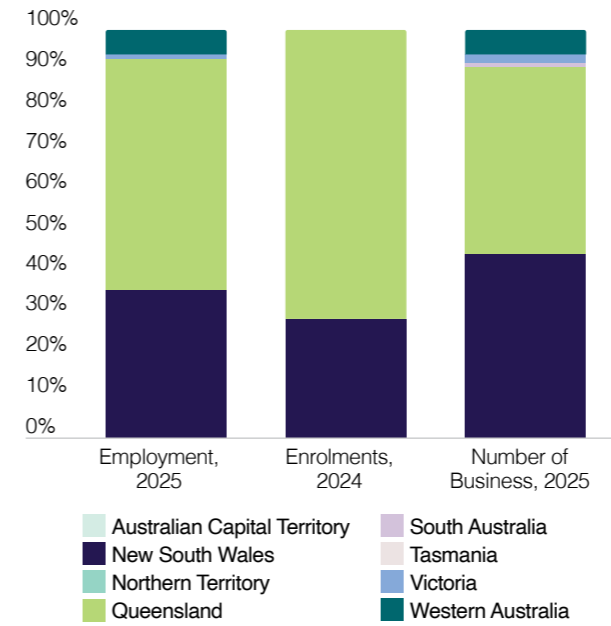
Approximately 65.1% of coal production is supplied to electricity generation (Figure M13). This highlights the need for succession planning to manage the Net Zero transition, particularly to replace the volume of electricity generated by coal-fired power plants. There is also a need to manage the transition downstream. If the shift to Net Zero leads to the shutdown of coal mines and power stations, the economic effects can be devastating for local communities unless managed properly through coordinated succession planning. Particularly because many of these communities are regionally linked, and there might not be employers large enough in the region to absorb the newly out-of-work workforce. A successful transition will require coordination across various levels of government and stakeholders.

Figure M11: Coal Mining employment, 2015–2025



Source: ABS, Labour Force, Australia, Detailed, November 2025; Trended by AUSMASA.

Figure M12: Coal mining employment size, number of enrolments and businesses by state and territory, 2024–2025

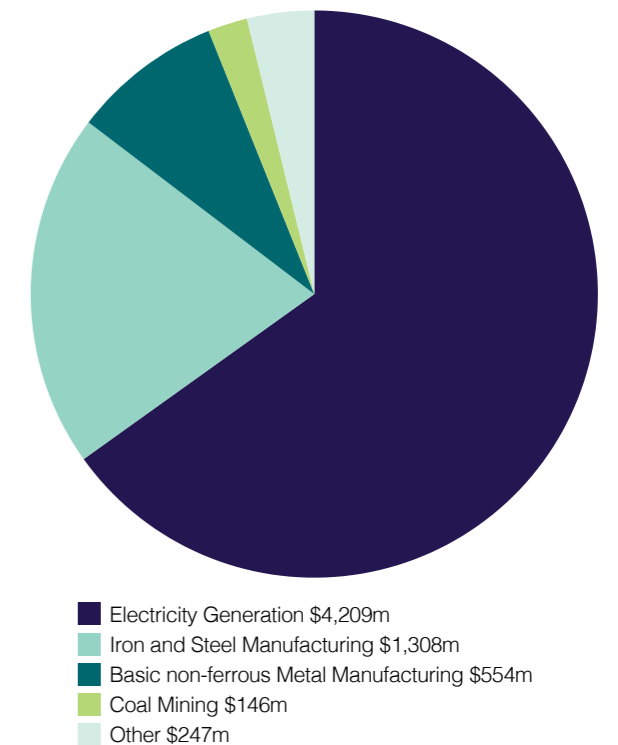


Source: ABS, Labour Force, Australia, Detailed, November 2025; Trended by AUSMASA; ABS, "Counts of Australian Businesses, including Entries and Exits, June 2021 to June 2025", December 2025; VOCSTATS, "Total VET students and courses 2015-2024", 2024. Note: The enrolment figure is based on the overall RII training packages, not exclusive to the sub-industries.

8 out of the 11 key occupations in the Coal Mining sector have experienced shortages in 2025.

Over the past decade, demand for these key occupations has increased, as reflected in positive vacancy growth across all 11 roles (Table M2). The sector continues to face challenges in recruitment, retention, and attraction, particularly due to negative perceptions linked to climate change. The challenge is exacerbated by a lack of understanding of VET pathways among career counsellors and school leavers, exacerbating the skills shortage. With growing electrification in the sector, there is rising demand for electrical, diagnostic, and digital skills.

Figure M13: What does the sector support in 2023?



Source: ABS, "Australian National Accounts: Input-Output Tables, 2022-23", March 2025.

Table M2: Key occupations, 2025

Occupations	Employed	10-Yr vacancies change	Included in CSOL?	Shortage
Drillers, Miners and Shot Firers	16,600	178%	No	RS
Metal Fitters and Machinists	5,200	148%	Yes	S
Other Building and Engineering Technicians	5,000	20%	Yes	NS
Electricians	4,400	140%	Yes	S
Truck Drivers	2,900	63%	No	S
Earthmoving Plant Operators	1,200	67%	No	S
Mining Engineers	1,000	185%	Yes	S
Production Managers	1,000	59%	Yes	NS
Surveyors and Spatial Scientists	800	73%	Yes	S
Other Stationary Plant Operators	700	165%	No	NS
Diesel Motor Mechanic	28	No data	Yes	S

Source: ABS, Labour Force Estimate: Customised Report, 2026; JSA, "Occupation Shortage List", 2025; JSA, "Internet Vacancy Index (IVI)", February 2026; Department of Home Affairs, "The Core Skills Occupation List", 2024; Note: 1. RS: Regional Shortage; S: Shortage; NS: Not in Shortage. 2. Employment is calculated as the four-quarter average for 2025 across occupation unit groups within each sub-industry, rounded to the nearest 100. 3. For Diesel Motor Mechanics, the 2021 census employment figure is used instead.