



# State of the Industry - Exploration and Other Mining Support Services

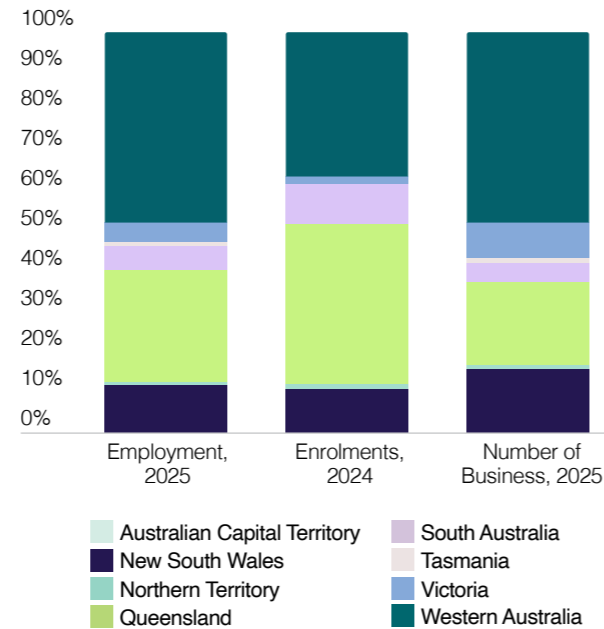
## The exploration sector faces declining employment

The exploration and other mining industries experienced a decline in employment around 2019–2020 (Figure M23). Even before the COVID-19 pandemic, Australia's mineral exploration sector faced historically low investor confidence, which constrained activity and hiring.<sup>1</sup> The combined effects of weak investment and the pandemic reduced employment to around 41,000 in 2020. Since then, the industry has rebounded, reaching approximately 69,000 employees by 2025 (Figure M24).

## Activity is largely concentrated in Western Australia and Queensland

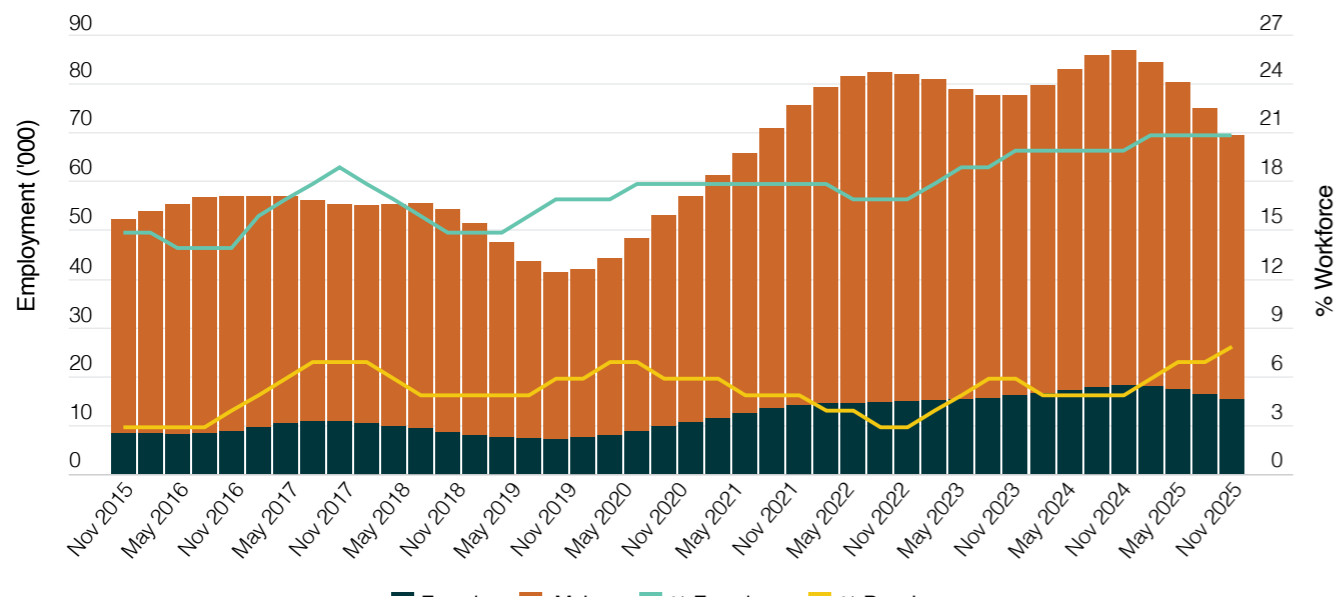
Like other mining subsectors, both employment and business activity are concentrated in WA and QLD, with NSW housing a relatively stable proportion of the workforce and businesses.

Figure M24: 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.

Figure M23: Exploration and Other Mining Support Services employment, 2015–2025



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

<sup>1</sup> AMEC, "AMEC Submission", 2021.

## The sector is a key enabler of mining activity

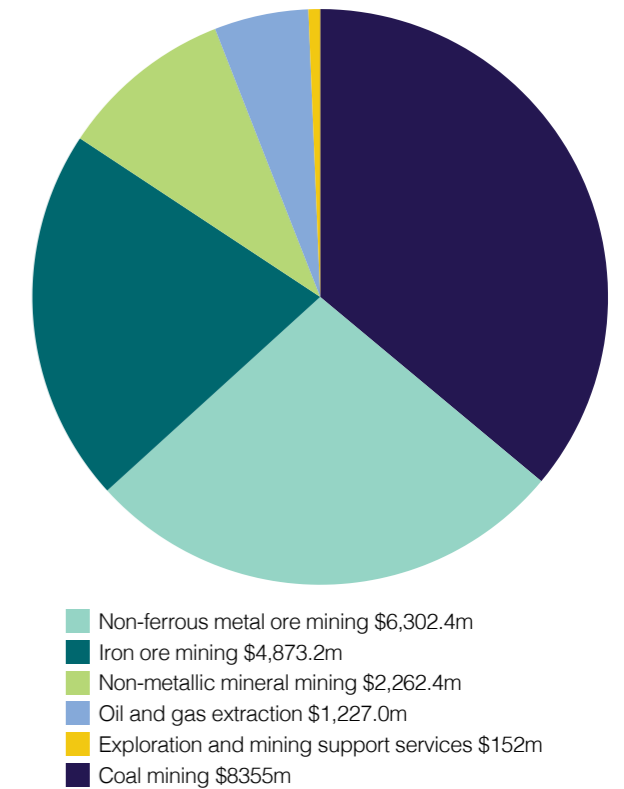
The sector primarily supplies other Mining industries, providing 48.2% of its output to Metal Ore Mining (including Iron Ore), 36.1% to Coal Mining, and 9.8% to Non-Metallic Mineral Mining (Figure M25).

## 8 out of 11 key occupations face critical shortages

8 out of 11 key occupations in the sector are currently experiencing skills shortages, with Drillers, Miners and Shot Firers and Metal Fitters and Machinists being at the top (Table M6).



Figure M25: What does the sector support in 2023?



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

Table M6: Key occupations, 2025

Occupations	Employed	10-Yr vacancies change	Included in CSOL?	Shortage
Drillers, Miners and Shot Firers	9,500	178%	No	RS
Metal Fitters and Machinists	6,300	148%	Yes	S
Truck Drivers	3,800	63%	No	S
Other Building and Engineering Technicians	3,400	20%	Yes	NS
Geologists, Geophysicists and Hydrogeologists	3,000	247%	Yes	S
Electricians	2,700	140%	Yes	S
Mining Engineers	2,200	185%	Yes	S
Production Managers	1,800	59%	Yes	NS
Structural Steel and Welding Trades Workers	1,600	72%	Yes	S
Other Construction and Mining Labourers	1,400	120%	No	NS
Diesel Motor Mechanic	21	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. For Diesel Motor Mechanics, the 2021 census employment figure is used instead.