# CANADIAN MINING
# LABOUR MARKET OUTLOOK

2026

MINING INDUSTRY
HUMAN RESOURCES COUNCIL
CONSEIL DES RESSOURCES HUMAINES
DE L'INDUSTRIE MINIÈRE

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**For more information, contact:**
Mining Industry Human Resources Council
260 Hearst Way, Unit 600
Kanata, ON K2L 3H1
(613) 270-9696
research@mihr.ca

**Or visit the website at:**
www.mihr.ca

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*Cover photo courtesy of Teck Resources Limited.*

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# INTRODUCTION

*Photo sourse: Camus Photography*

**Canada's mining industry is entering 2026 with strong momentum and growing optimism. There is a clear motivation to expand the mining industry and fast-track projects across the country. Over the past two years, rising mineral prices (especially gold) have contributed to notable growth in employment, capital investment and exploration activity.**

In this environment, and with US tariffs threatening Canada's economic stability, mining is increasingly viewed as a major opportunity to protect Canada's economic and strategic interests.

For example, the federal government's Critical Minerals Strategy[1] aims to support the industry's growth through faster permitting, regulatory coordination and targeted funding for exploration and mine development. In addition, Canada's new Major Projects Office[2], launched in August 2025, has designated several mining projects as high priority and is working to advance and streamline regulatory approvals. These policies signal to the marketplace that mining is an important part of Canada's future growth and long-term stability.

There are currently 138 mining-related projects across the country, representing approximately $117 billion in potential investment.[3] This level of activity reflects strong confidence in Canada's mineral potential.

### MINING WORKFORCE PROFILE

While this report focuses on economic trends driving mining employment, MiHR publishes a complementary *Canadian Mining Workforce Profile* report providing detailed demographic statistics that are not included in the analysis below. This publication, set to release in 2027, will present the latest available statistics on key workforce characteristics, including age profile, educational attainment, Indigenous participation, the share of women in the mining workforce, and related indicators.

## About this Report

This report examines current Canadian mining labour market conditions and explores key areas that may face workforce challenges over the coming decade. It is structured into three main sections:

1) **Current State of Canada's Mining Industry**

2) **Future Outlook for the Mining Industry**

3) **Labour Market Forecast for Canada's Mining Industry**

1) Government of Canada, *Canada's Critical Minerals Strategy*. https://www.canada.ca/en/campaign/critical-minerals-in-canada/canadas-critical-minerals-strategy.html

2) Government of Canada, *Major Projects Office*. https://www.canada.ca/en/privy-council/major-projects-office.html

3) Natural Resources Canada, *Natural Resources: Major Projects Planned or Under Construction 2024 to 2034*. https://natural-resources.canada.ca/science-data/data-analysis/natural-resources-major-projects-planned-under-construction-2024-2034

# Key Data Sources

This report draws on a range of data sources to analyze key variables of interest, including demographic and economic factors shaping Canada's mining industry. Information sourced from both public and private entities is utilized to conduct a comprehensive analysis of Canada's mining labour market.

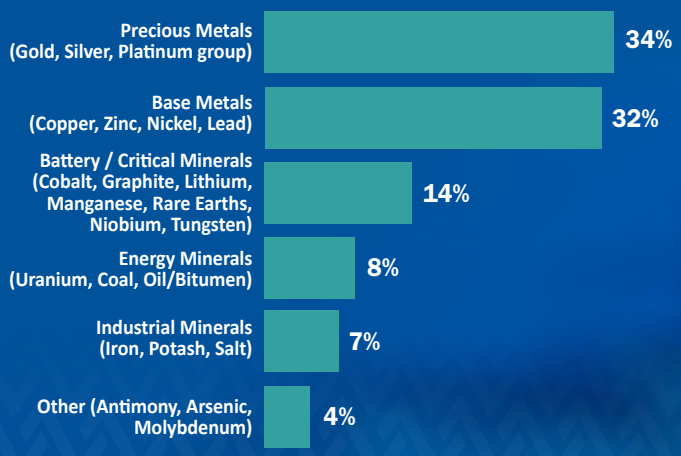
The analysis in this report primarily draws on data from Statistics Canada, including the latest Census, the Labour Force Survey (LFS), the System of National Accounts (SNA) and the Job Vacancy and Wage Survey (JVWS). The report also draws on complementary findings from MiHR's 2026 Mining Employer Survey.

**MiHR's 2026 Mining Employer Survey:** In January 2026, MiHR distributed a mining workforce survey to leading mining employers across Canada. Employers were requested to provide details regarding the occupational structure of their workforces and other factors that will impact future hiring needs. The resulting data represents 28 organizations, including mining companies and mining contractors.

## Mining Employer's Perspective: Survey Sample Profile

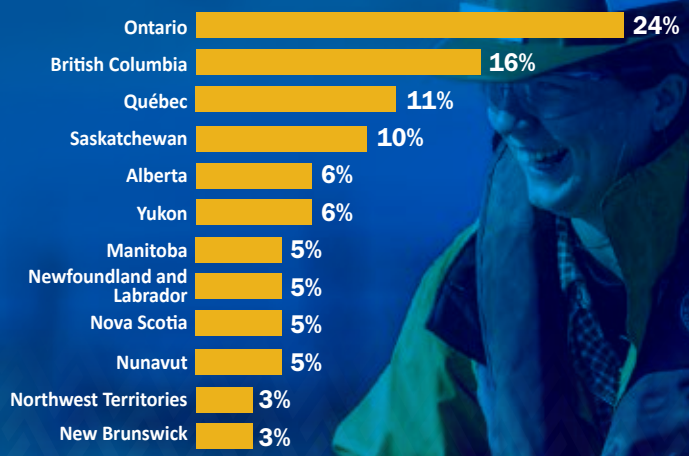
Employer respondents represent a broad range of commodities with precious metals, base metals and critical minerals among the most prominent. Similarly, respondents indicated that their operations span across Canadian provinces, with Ontario, British Columbia and Quebec most frequently cited.

***What commodities are actively mined or in advanced stages of development?*** ***Select all that apply***




*(71 Responses)* *Frequency (%)*

***Where does the specified mine site, project or company operate?*** ***Select all that apply***




*(60 Responses)* *Frequency (%)*

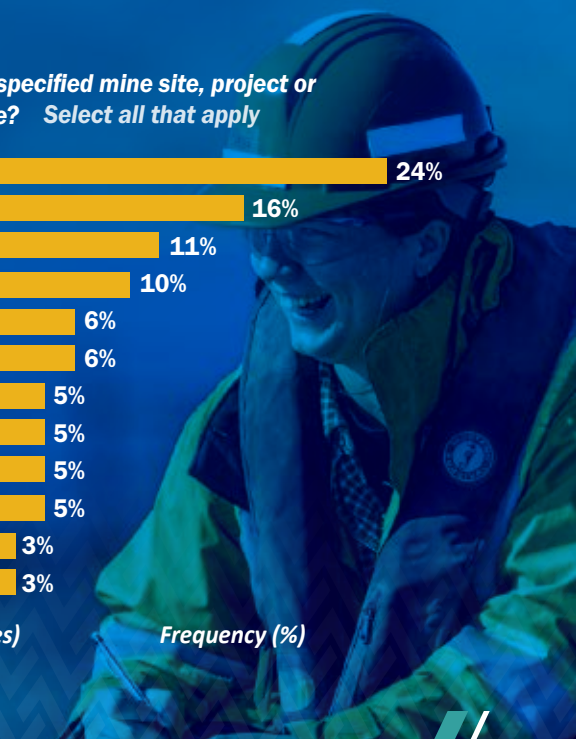


*Photo source: Baffinland*

# MiHR's Definition of Canada's Mining Industry

The mining industry includes a broad set of activities across the mine life cycle, including mineral exploration, mine development and construction, active extraction and processing, and mine closure, decommissioning and reclamation. Not all these activities are consistently captured in standard labour market data sources.

MiHR focuses on the segments of the mining industry for which data are most available and comparable. Accordingly, MiHR's definition of the mining industry includes activities that fall within the following four sub-sectors:

1. ***Extraction and Milling*** describes the activities at operating mines across Canada, including both surface and underground mining operations and on-site processing activities.
2. ***Oil Sands Mining*** comprises surface mining activities specific to oil sands operations, including the extraction of bitumen through open-pit methods, on-site upgrading and initial processing activities.
3. ***Mining Support Services*** includes the activities of organizations providing support services for mine construction, extraction, processing and exploration activities, usually on a contract or fee basis.
4. ***Primary Metal Manufacturing*** consists of activities that are directly downstream from extraction and milling, including smelting and refining of ferrous and non-ferrous metals.

Wherever possible, MiHR uses data and information that adhere to its definition of the mining industry. This includes industry-level data based on the North American Industry Classification System (NAICS). For more information about MiHR's definition of the mining industry, see Appendix A. It is important to note that NAICS codes do not always perfectly correspond to MiHR's definitions of mining sub-sectors. In such cases, MiHR employs the closest available proxy or adjusts the NAICS data to better reflect each sub-sector.


*Photo source: Vale*

# 1) CURRENT STATE OF CANADA'S MINING INDUSTRY

*Photo source: Teck Resources Limited*

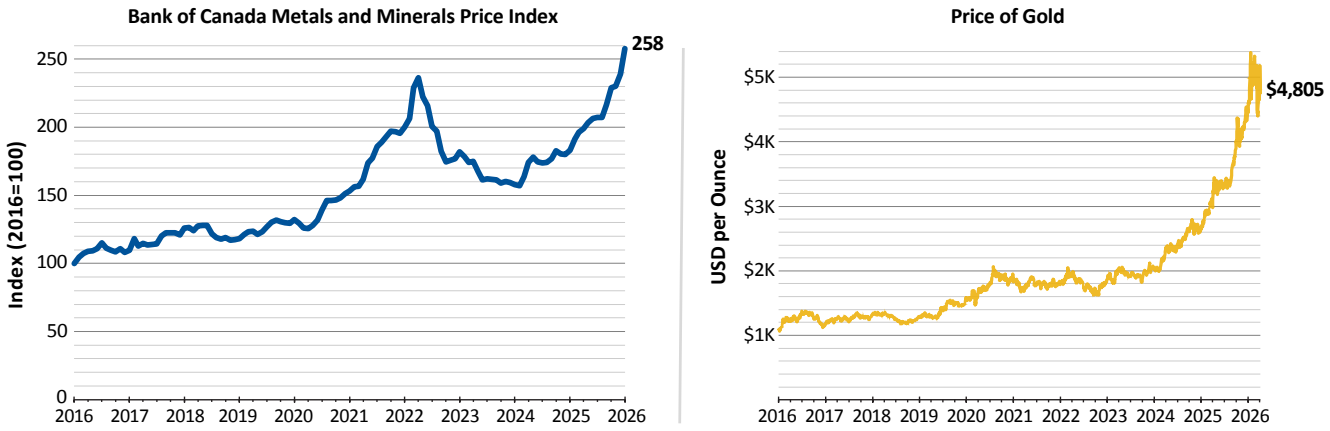
**The mining industry in 2026 is in a clear upswing. Several factors, including the ongoing global energy transition, tariff-driven uncertainty and heightened geopolitical competition have contributed to rising demand for minerals. As a result, the global trade landscape is shifting. New markets are emerging, while others are becoming more uncertain. Countries are rerouting their supply chains in response to these changes. With minerals gaining more strategic and industrial importance, mining has entered a new growth cycle.**

## Clear Signs of Industry Momentum

Several indicators suggest the mining industry is currently experiencing significant expansion. Mineral prices have risen significantly over the past few years, as shown in Figure 1. For example, gold prices have increased substantially, improving project viability and encouraging investment. These market conditions are supporting increased mining activity and contributing to employment growth across the industry.

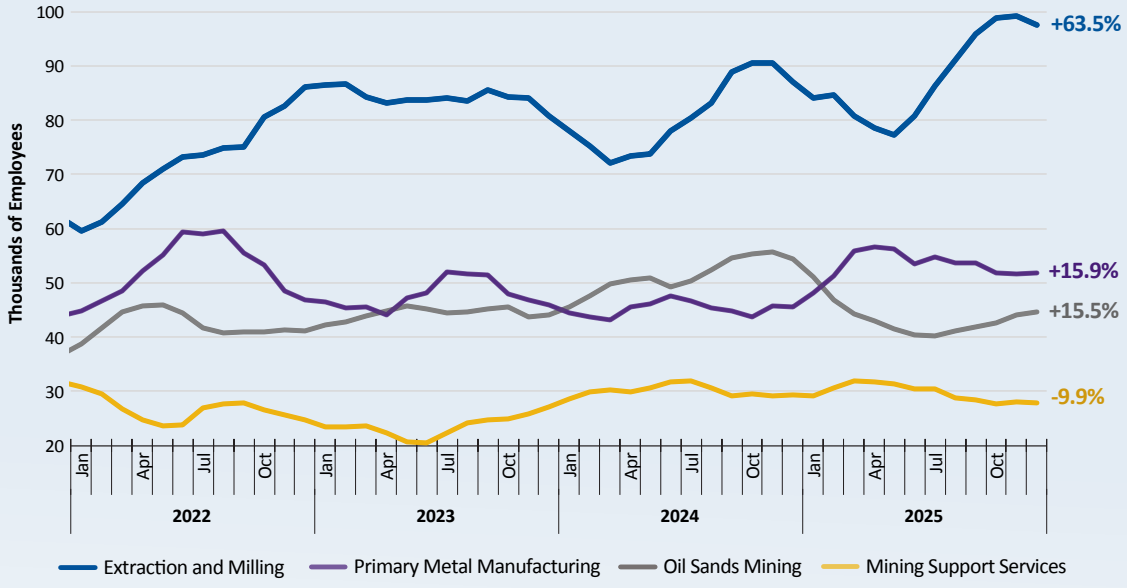
**WITH MINERALS GAINING MORE STRATEGIC AND INDUSTRIAL IMPORTANCE, MINING HAS ENTERED A NEW GROWTH CYCLE.**

## Figure 1 Metals and Minerals Price Trends (2016-2026)




*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026; Bank of Canada, Monthly Commodity Price Index – Metals and Minerals, 2026; MacroTrends.net, Gold Price - 10 Year Daily Chart, 2026.*

## Figure 2 Employment (3-Month Moving Average) by Mining Sub-sector (2022-2025)




*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026; Statistics Canada, Labour Force Survey, 2026.*

Figure 2 shows employment trends across the four main industry sub-sectors (*Extraction and Milling, Oil Sands Mining, Mining Support Services, and Primary Metal Manufacturing*) from January 2022 through December 2025.

Employment in *Extraction and Milling* expanded significantly, increasing by 63.5% over the period. By contrast, other mining sub-sectors remained within their usual range. This indicates a period of uneven growth across mining sub-sectors, with *Extraction and Milling* accounting for the bulk of employment gains.

## Mining Employer's Perspective: Workforce Expectations

Most employers indicate that they expect their workforce to increase in size over both the next 90 days and the next 12 months.

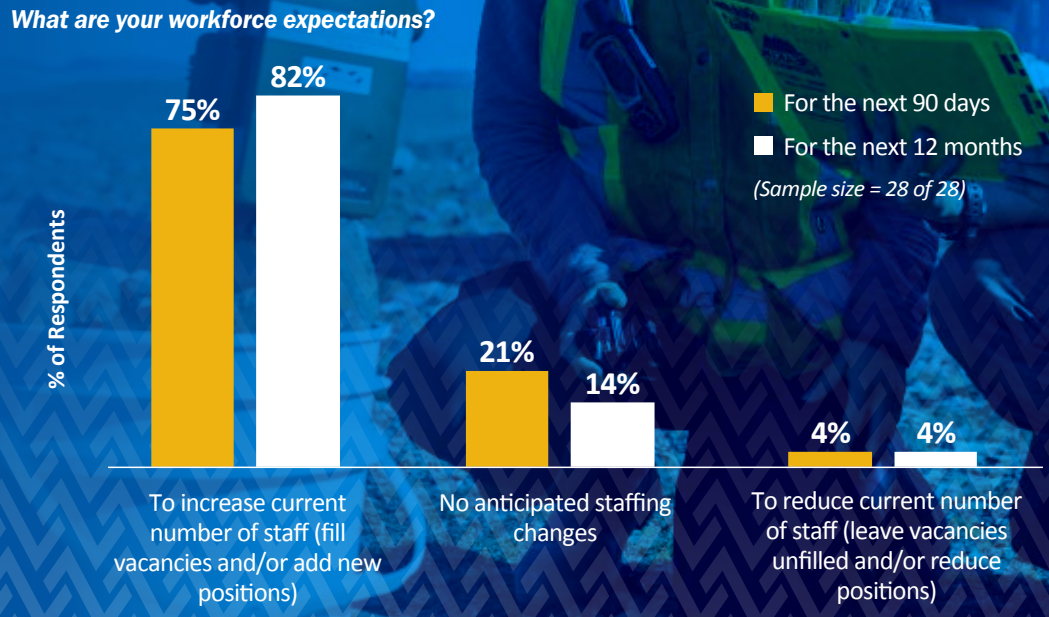
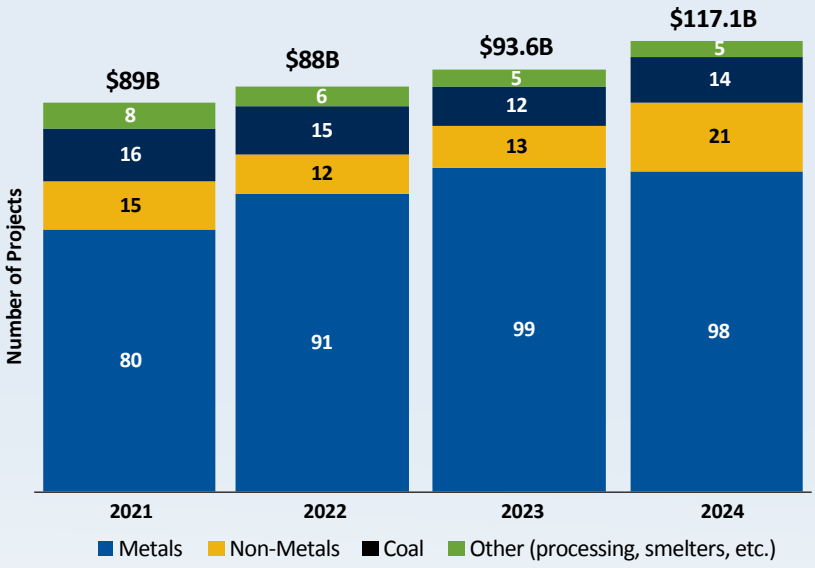



*Photo source: Baffinland*

## Figure 3 Major Project Trends in Mining (2021-2024)




*Source: Natural Resources Canada, Major Project Trends by Sector: Mining, 2025.*

The observed employment gains likely reflect a combination of expansions at existing operations and new project development.

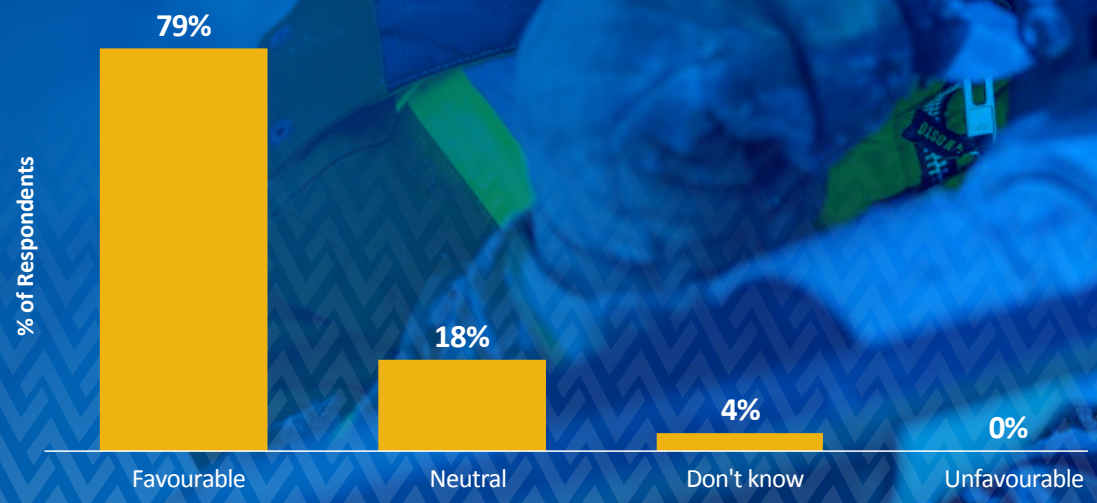
According to Natural Resources Canada (NRCan), both the number and potential investment value of mining projects increased between 2021 and 2024, largely driven by metal and non-metal projects (Figure 3). Over this period, the number of mining projects rose from 119 in 2021 to 138 in 2024. This represents a 32% increase in potential capital value, from $89 billion to $117 billion.

At the same time, persistent labour market tightness remains a key risk to sustaining this growth and fully realizing the industry's expanding project pipeline.

## Mining Employer's Perspective: Business Conditions

Most employers indicate that current business conditions are favourable, with no respondents reporting unfavourable conditions.

***The current state of business conditions is generally:***




*(Sample size = 28 of 28)*

## Mixed Evidence of Labour Market Tightening

While some indicators point to increasing labour market pressures, others suggest that the burden to find workers has been easing slightly over the past few years. For example, aggressive employment growth, as observed in the mining industry since 2022, can be a catalyst for labour market tightness, especially if employment grows unsustainably. Recruitment and workforce training take time and may not respond seamlessly to fast-growing labour demand.

Labour market tightness simply means that labour supply is not keeping pace with labour demand. A tight labour market is often characterized by labour shortages, which make it more difficult for employers to find the skilled workers they require.

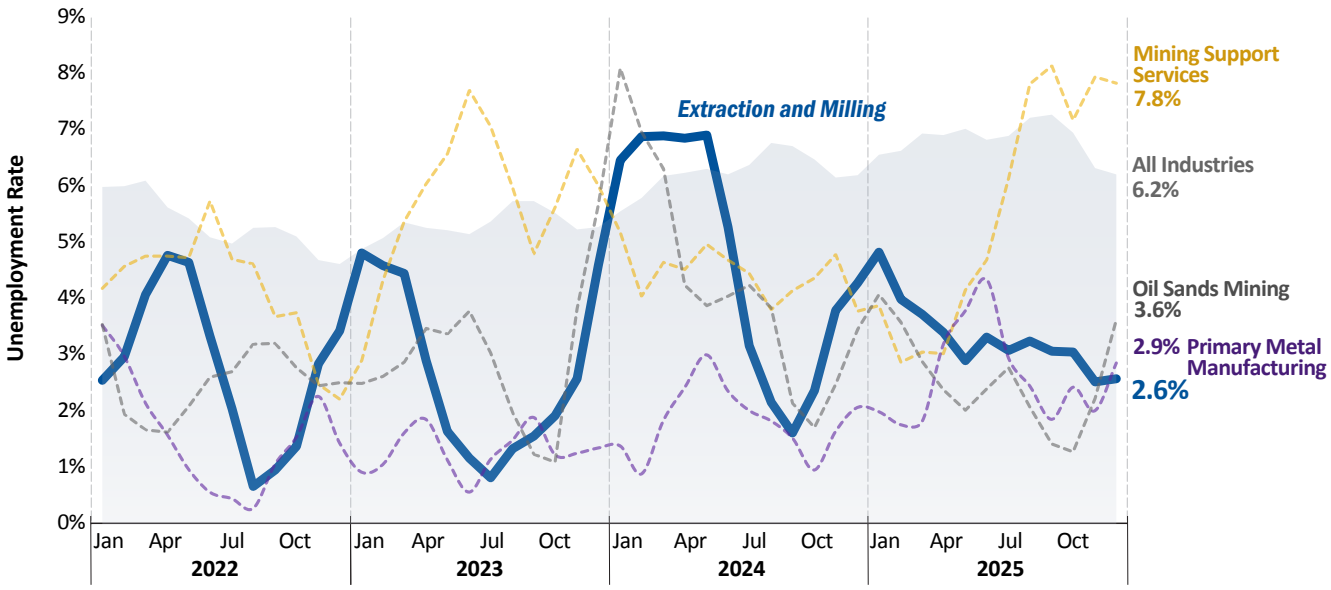
Tighter labour markets drive up costs in recruitment, wages and advertising, and increase the need for competitors to inefficiently poach talent from each other. On the other hand, a labour market that is more sustainable and competitive would have a labour pool sizeable enough to effectively respond to the short-term acute needs of the industry.

*Photo source: Camus Photography*

## Low Unemployment Rate

A persistently low unemployment rate is a key indicator of labour market tightness, suggesting that the industry may be nearing the limits of its available labour supply. Figure 4 compares unemployment rates across all industries in Canada with those for *Extraction and Milling, Oil Sands Mining, Mining Support Services, and Primary Metal Manufacturing*. While some seasonal variation is evident, unemployment in *Extraction and Milling* and *Primary Metal Manufacturing* is notably low, frequently dropping below 1% during peak hiring periods. Under these conditions, employers often face a constrained pool of available candidates, which can increase recruitment challenges.

**Figure 4** **Unemployment Rate (3-Month Moving Average) by Mining Sub-sector (2022-2025)**



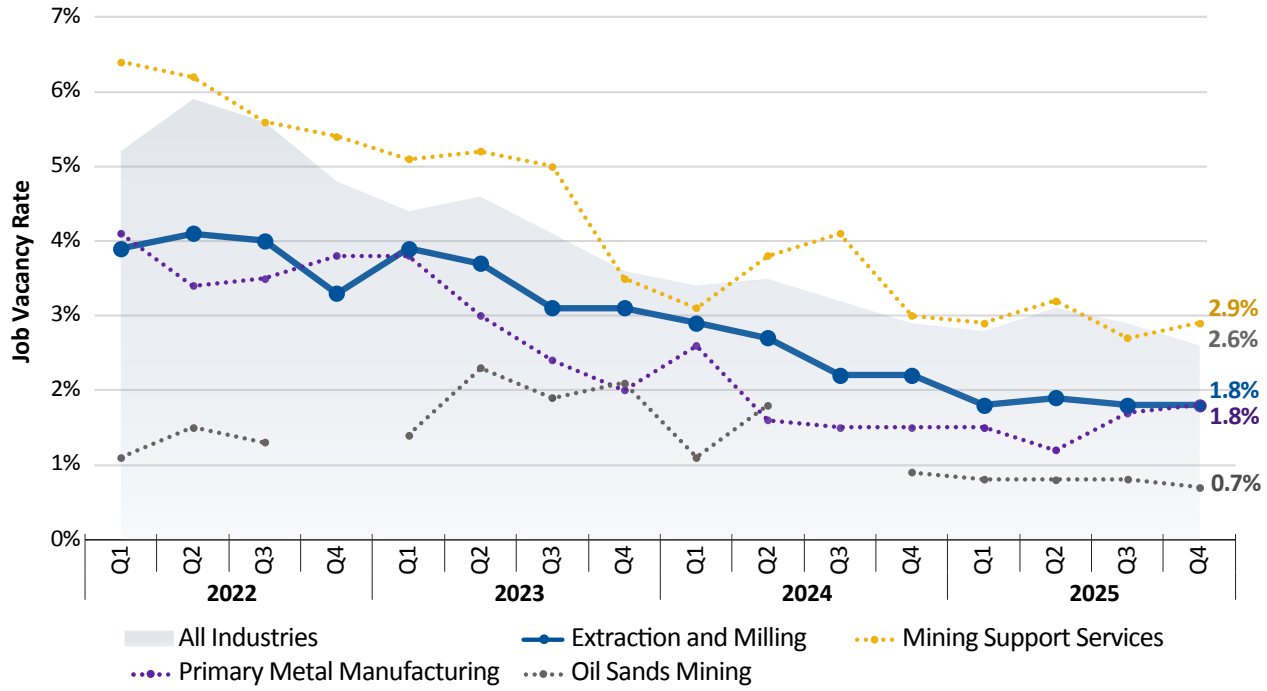

*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026; Statistics Canada, Labour Force Survey, 2026.*

## Job Vacancy Rate

On the other hand, job vacancy rates have trended downward since 2022, suggesting that labour market pressures have eased. This pattern is evident not only within mining sub-sectors, but also across all industries in Canada, indicating a normalization of hiring conditions toward pre-pandemic levels (Figure 5).

The job vacancy rate measures the share of total labour demand represented by unfilled positions. In a tight labour market, employers struggle to convert their labour demand into hires. The recent decline suggests that mining employers are increasingly able to fill roles, pointing to a better functioning labour market rather than a weakening in demand.

## Figure 5 Job Vacancy Rates by Mining Sub-sector (2022-2025)

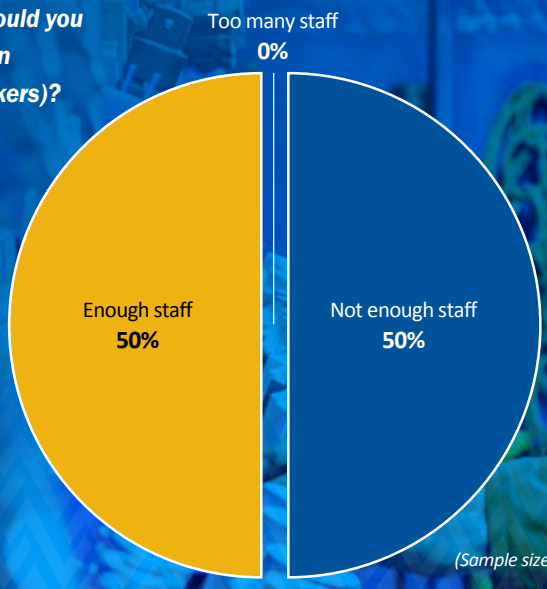



*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026; Statistics Canada, Job Vacancy and Wage Survey, 2026.*

## Mining Employer's Perspective: Staffing Situation

Employers were evenly split in their assessment of staffing levels, with half reporting they had enough staff and half indicating they did not have enough. No employers reported having too many staff.

***Over the past 30 days, how would you describe your staffing situation (permanent and contract workers)?***



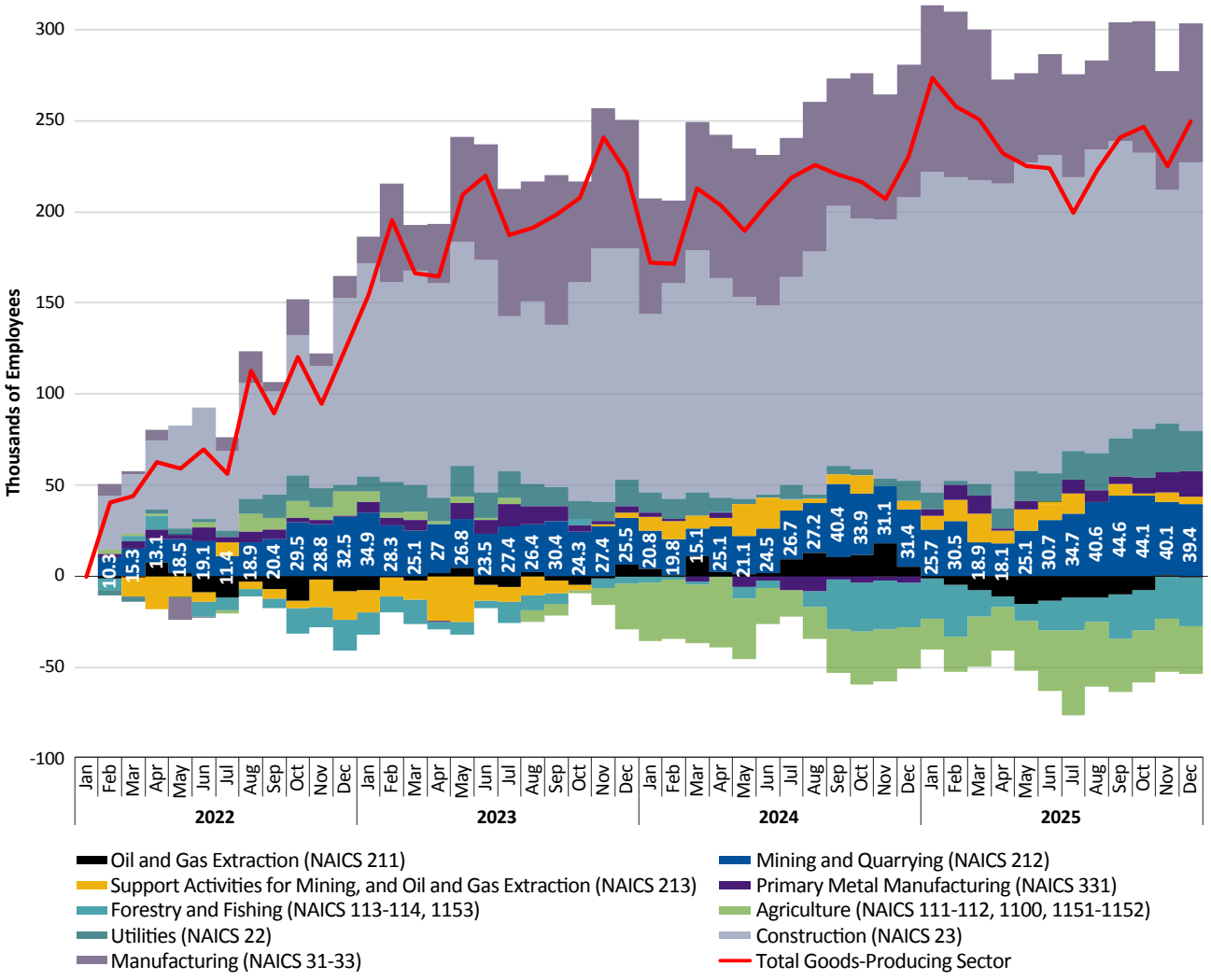

*(Sample size = 26 of 28)*

## Labour Force Expansion across Goods-producing Industries

Easing labour conditions (such as falling job vacancy rates) in addition to rapid employment growth are made possible by an expanding labour force. Figure 6 shows that, across most goods-producing industries, the labour force has grown since January 2022.

Construction, Manufacturing and Utilities have all seen cumulative gains in their labour forces over this period. Mining has likewise expanded its labour force, supporting recent employment growth. Together, these trends suggest that mining's growth has not necessarily come at other sectors' expense but reflects broad-based labour market momentum across goods-producing industries.

### Figure 6 Cumulative Labour Force Growth by Goods-producing Industry (2022-2025)

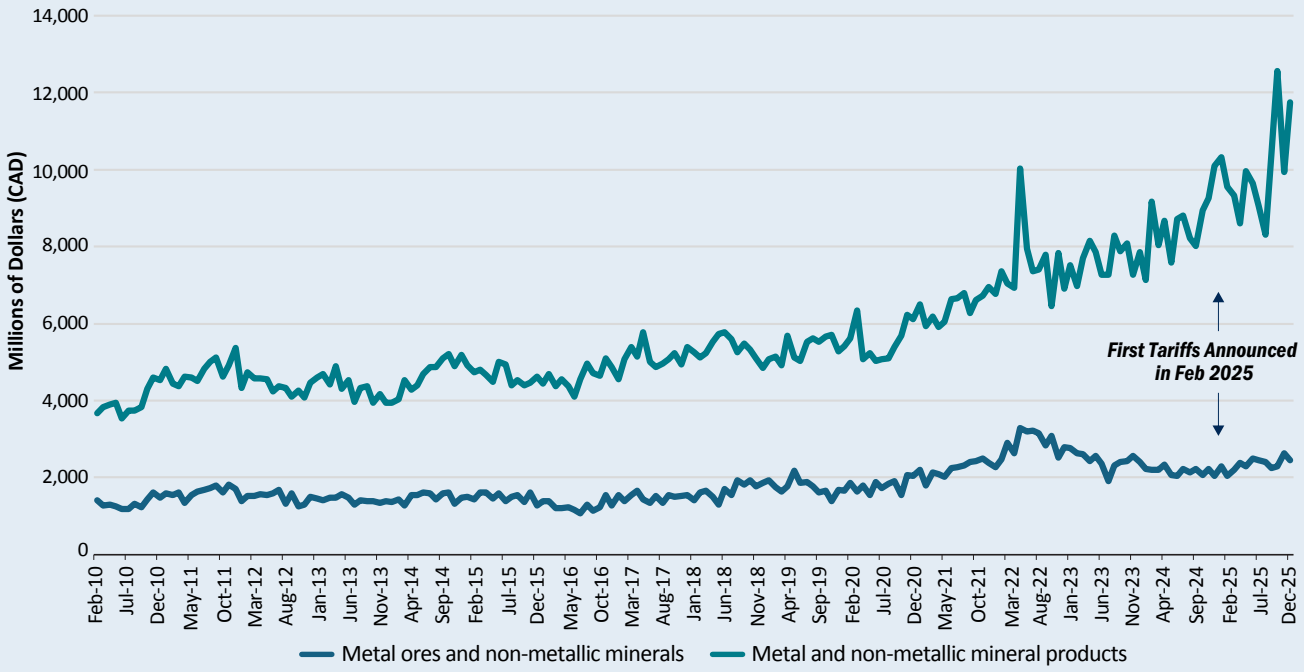



*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026; Statistics Canada, Table 14-10-0291-01: Labour force characteristics by industry, monthly, seasonally adjusted, last 5 months (x 1,000), 2026.*

# External Factors Shaping the Labour Market

The international trade environment is entering a period of structural adjustment. After decades of steadily expanding global integration, recent years have seen a rise in protectionist measures, supply chain realignments and shifting geopolitical priorities. Established trading relationships are being disrupted, renegotiated, and, in some cases, fundamentally redefined.

## Figure 7 Monthly Canadian Exports by Merchandise Category (2010-2025)



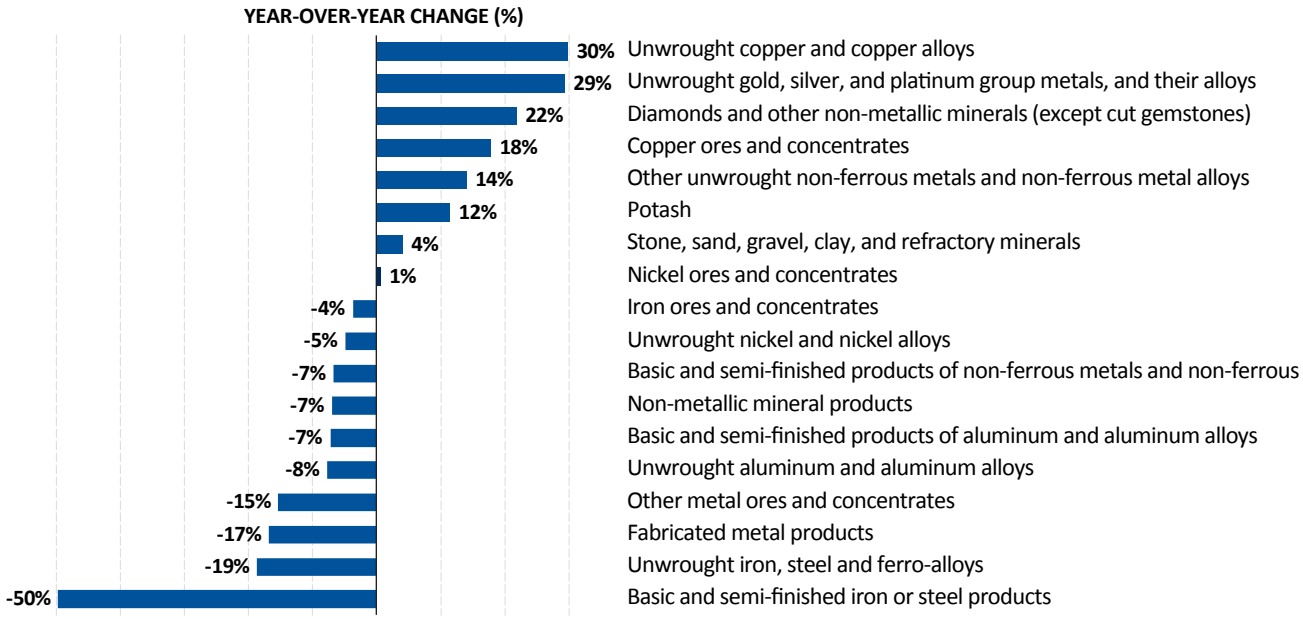

*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026; Statistics Canada, Canadian International Merchandise Trade, 2026.*

As a major exporter of natural resources, Canada is particularly exposed to these shifts. Changes in trade policy introduce risks to project timelines, capital allocation and ultimately labour demand across exploration, development and production phases. While these risks are increasingly discussed within the industry, there has not yet been clear evidence of significant negative disruption to Canadian mineral exports (Figure 7).

The export picture varies considerably across commodities. Some segments, such as steel, have faced layoffs and production cutbacks, while others (particularly gold) have benefited from the new economic environment (Figure 8).

As of December 2025, *Unwrought gold, silver, and platinum group metals, and their alloys* accounted for approximately 54% of total mining export value, meaning its price movements heavily influence overall export performance. The recent increase in export value is largely driven by a flight to gold in global markets, which has pushed prices sharply higher. This reflects price effects more than a significant increase in the physical volume of gold exported.

## Figure 8 Year-over-Year Changes in Canadian Exports by Merchandise Category (Dec 2024 – Oct 2025)

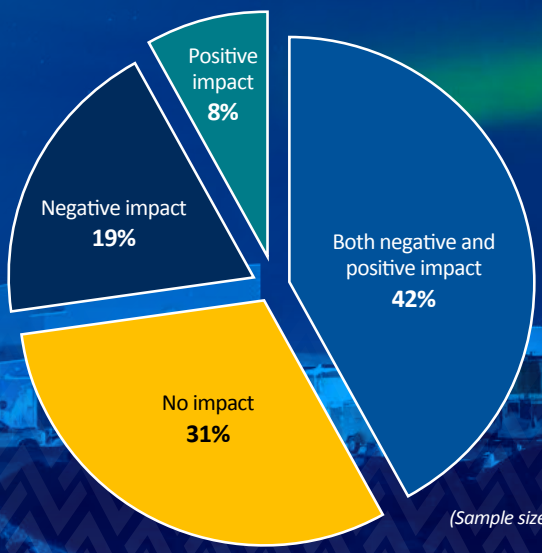



*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026; Statistics Canada, Canadian International Merchandise Trade, 2026.*

## Mining Employer's Perspective: Impact of Tariffs

The impact of tariffs is largely ambiguous, with some employers reporting positive effects, others negative effects, and many indicating no impact.

***Over the last three months, how have the U.S. or Global tariffs or Canada's retaliatory tariffs affected your business?***

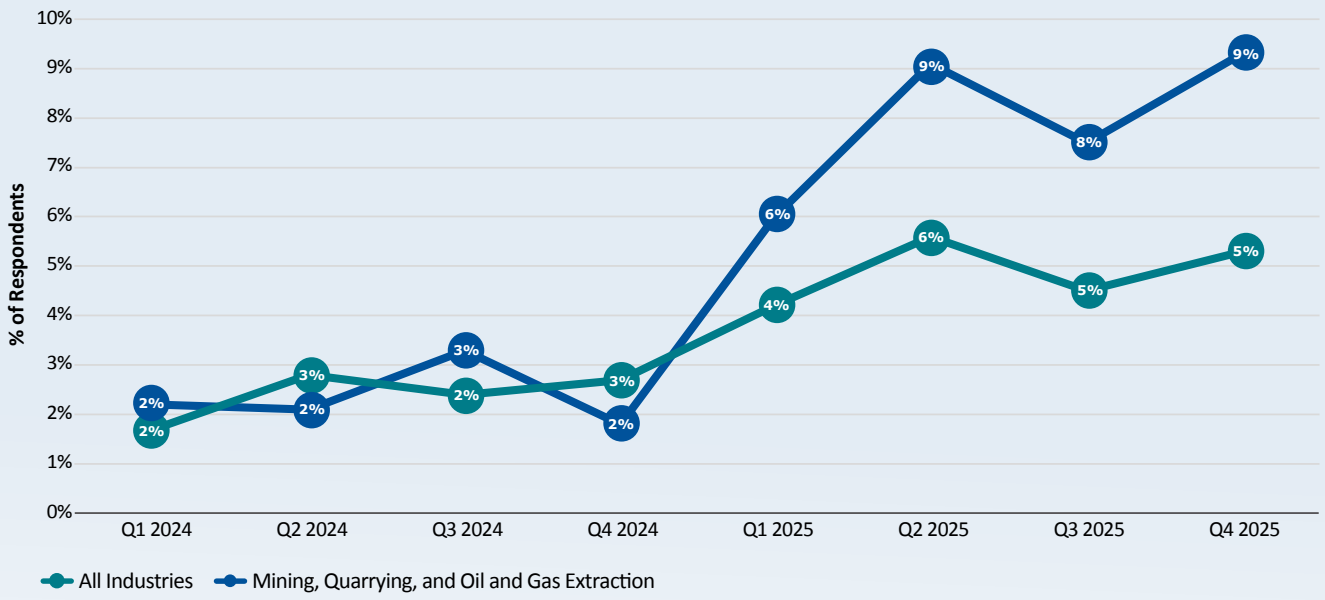



*(Sample size = 26 of 28)*

Although exports have not been materially disrupted, there are emerging signs that industry confidence in external markets is weakening. The *Canadian Survey on Business Conditions* monitors the economic outlook and expectations among businesses on a quarterly basis.

When asked whether exporting goods and services would pose an obstacle in the upcoming quarter, respondents in *Mining, Quarrying and Oil and Gas Extraction (NAICS 21)* reported a marked increase in concern. The share of businesses anticipating export-related challenges rose from approximately 2% in early 2024 to 9% by late 2025 (Figure 9).[4] This trend suggests that US tariffs and broader trade uncertainty have begun to weigh on mining industry sentiment. Notably, the increase in mining outpaces the average across all industries in Canada.

**Figure 9** **Share of Respondents Anticipating Challenges Selling Outside of Canada (Q1 2024 – Q4 2025)**




*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026; Statistics Canada, Canadian Survey on Business Conditions, 2026.*

4) Note that, for each quarter, data from *Canadian Survey on Business Conditions* was accessed from a separate table product number. This means the design and administration of this survey may have varied from quarter to quarter to accommodate new emerging and topical questions. MiHR has identified those questions that are consistent throughout and has presented them as a time series for the purpose of this analysis.

# 2) LONG-TERM OUTLOOK FOR THE MINING INDUSTRY

*Photo source: Baffinland*

**In the coming years, the mining industry is positioned to benefit from several tailwinds that support continued growth and rising labour demand. Emerging trends in capital investment, public policy support and the green energy transition suggest that the foundation for long-term expansion continues to strengthen.**

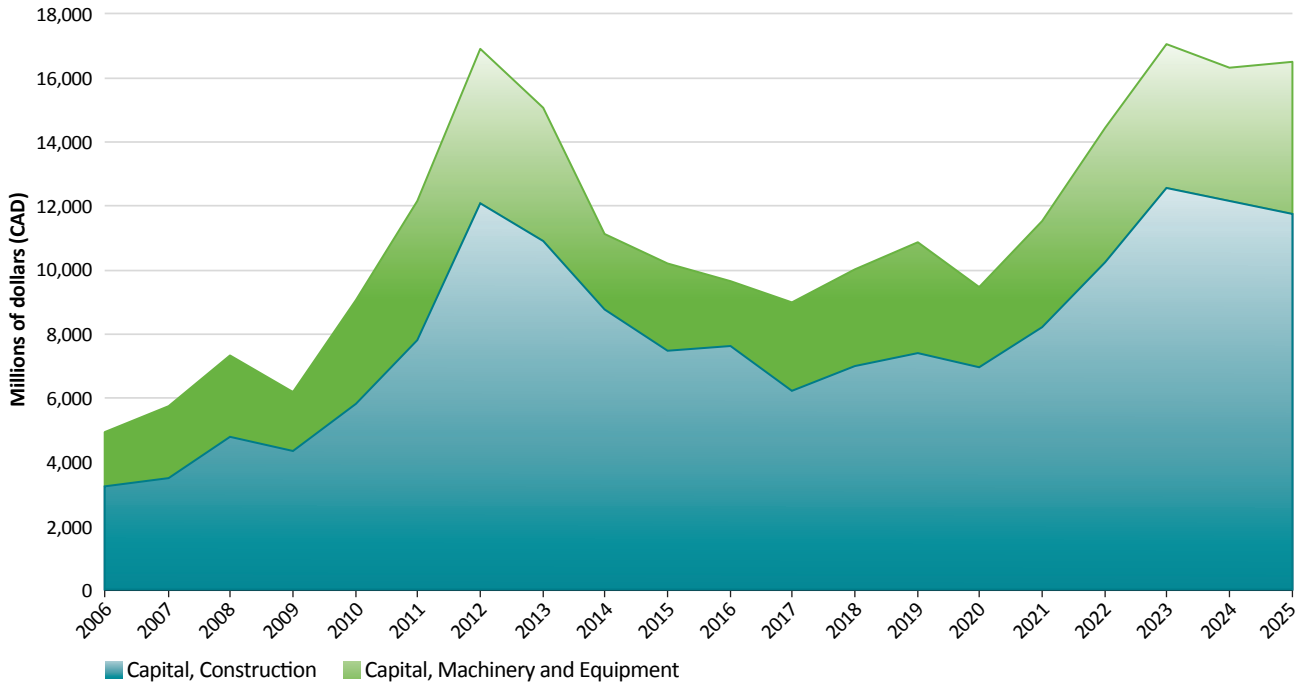
The analysis in this section is intended to provide context for the mining industry's employment outlook. Capital investment, exploration activity and policy support are key drivers of mining development, influencing the timing, scale and geographic distribution of labour demand. Changes in economic activity affect not only the number of workers required, but also the types of occupations, skills and workforce adjustments needed to support industry growth. These dynamics translate directly into future workforce requirements and inform the employment forecast presented in Section 3.

## Strong Investment Spending

A rise in capital expenditures points to renewed investment momentum within the industry. Spending on construction, as well as machinery and equipment, has returned to previous highs (Figure 10). This is an encouraging signal, as these categories are inherently forward-looking. Increased capital spending typically precedes operational expansion, translating into higher labour demand and future mining development.

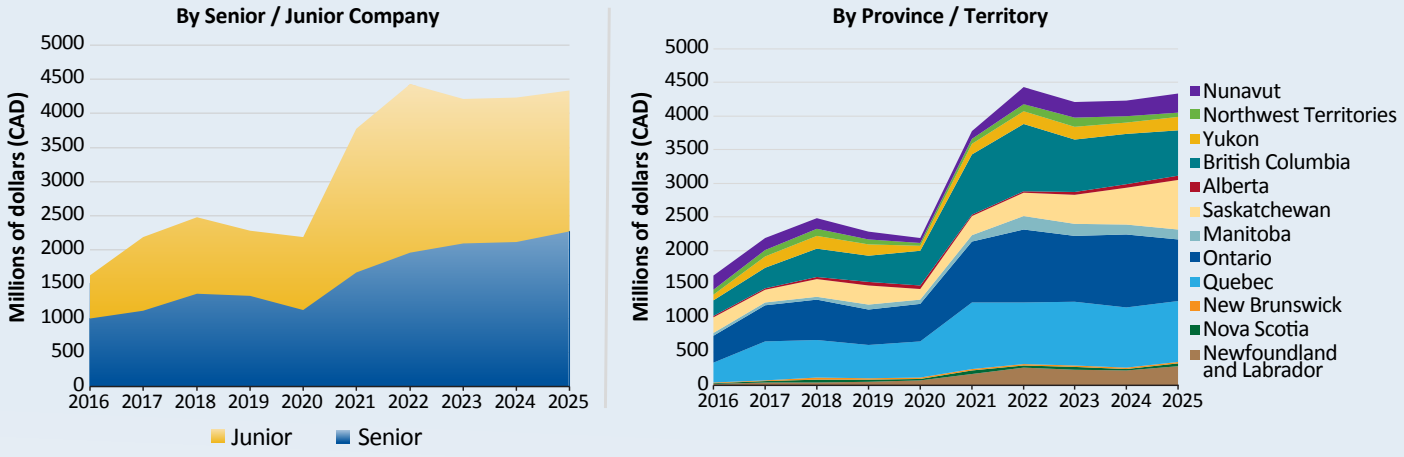
A similar trend is evident in exploration spending, which has grown by approximately 50% since 2020 (Figure 11). As a leading indicator, exploration investment reflects confidence in project pipelines and long-term viability. Elevated spending in this area suggests that firms are positioning themselves for future production growth, reinforcing a constructive outlook for the industry.

## Figure 10 Capital Expenditures in Mining (2006-2025)




*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026; Statistics Canada, Capital and repair expenditures, non-residential tangible assets, by industry and geography (Table 34-10-0035-01), 2026.*

## Figure 11 Mineral Exploration Spending by Project Type and by Province (2016-2025)

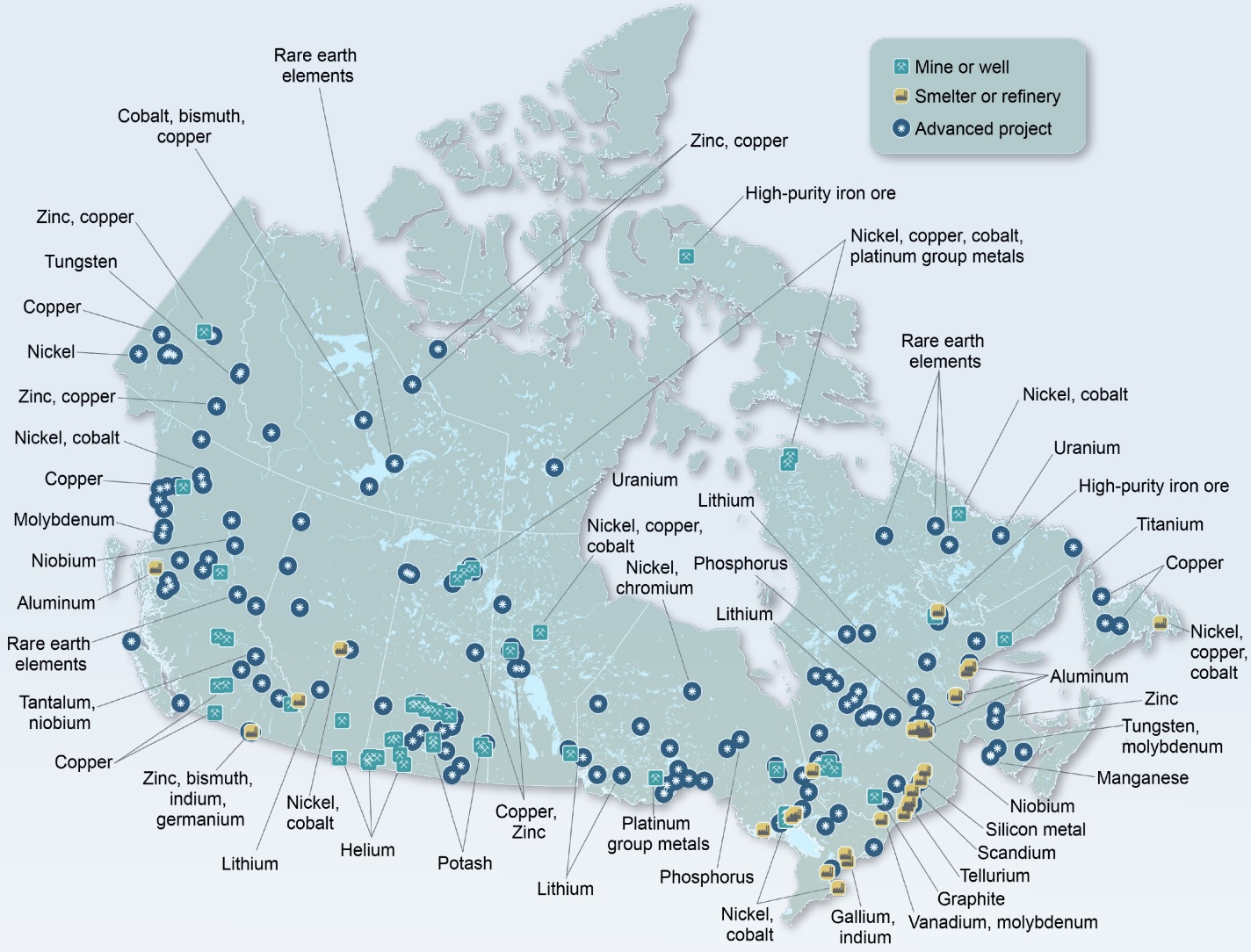



*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026; Natural Resources Canada, Survey of Mineral Exploration, Deposit Appraisal and Mine Complex Development, 2026.*

# Mining as a Government Priority

Since the announcement of US tariffs in early 2025, there has been an increased urgency to strengthen Canada's economic security and resilience. In this context, the mining industry is increasingly viewed as a strategic opportunity for growth. Federal and provincial governments have advanced several policy initiatives aimed at accelerating mining development and ensuring Canada can fully capitalize on its mineral resource potential (Figure 12). These developments improve regulatory clarity and reduce uncertainty, both of which are critical to long-term capital investment decisions.

## Figure 12 Critical Mineral Development Across Canada (2025)




*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026; Government of Canada, Critical Minerals: an Opportunity for Canada, 2026.*

## Federal Budget 2025

Canada's 2025 federal budget, announced in November 2025, included the most substantial investment in the mining industry in decades.[5] Notably, the budget committed $2 billion over five years to establish the *Critical Minerals Sovereign Fund*, enabling the federal government to invest directly in strategic critical minerals projects. It also created the *First and Last Mile Fund* (with up to $1.5 billion through 2030) to advance near-term critical minerals projects and associated infrastructure. Lastly, the budget included several targeted tax incentives designed to stimulate capital investment and improve project economics, such as the *Productivity Super-deduction*.

## The Major Projects Office

The federal government launched the Major Projects Office (MPO) in August 2025 to coordinate and accelerate projects of strategic economic significance, including major mining and resource developments. This new entity advances nation-building projects by providing a single point of contact to streamline regulatory processes, coordinate financing and expedite major projects, while protecting the environment and upholding the rights of Indigenous peoples.[6] This approach is intended to create a more efficient and predictable environment for investors and project proponents.

As of November 2025, the MPO had announced 11 major projects for federal coordination and review, representing more than $116 billion to the Canadian economy. Five of these projects are in the mining and critical minerals industry, accounting for billions of dollars in planned capital investment and expected to contribute significantly to regional economic activity, resource development and future workforce demand within Canada's mining industry.

To support the MPO's mandate, the federal government has committed to shortening review timelines by reducing duplication between federal and provincial processes. At the 2026 Prospectors & Developers Association of Canada (PDAC) Convention, the Minister of Energy and Natural Resources stated that "from the time [a] project is referred to the MPO, you'll get a conditions document within two years," a timeline that would be the fastest in the G20.[7]

## The Canadian Critical Minerals Strategy

Launched in December 2022 with close to $4 billion in funding from Budget 2022, the Canadian Critical Minerals Strategy[8] is a federal initiative designed to increase the supply of responsibly sourced critical minerals (i.e., those essential for Canada's economic security and the transition to a low-carbon economy) and build end to end value chains for these materials.

The strategy aims to strengthen the mining industry's competitiveness through faster project approvals, improved infrastructure, closer Indigenous collaboration and focused support for exploration and skills development.

## Provincial and Territorial Initiatives

Not only is the federal government supportive of mining development, but many provincial and territorial governments likewise recognize the significant economic opportunity. Several have introduced targeted policy reforms to accelerate mining development and strengthen the critical minerals supply chain.

- British Columbia's *Critical Minerals Strategy*[9] and *Infrastructure Projects Act*[10] aim to accelerate approvals for provincially significant projects and improve coordination across permitting authorities, helping advance major resource and infrastructure developments.

5) Mining Association of Canada, *Budget 2025 Historic for Canada's Mining Sector*, 2025. https://mining.ca/wp-content/uploads/dlm_uploads/2025/11/MAC-press-release-Budget-2025-final.pdf

6) Government of Canada, *Major Projects Office*. https://www.canada.ca/en/privy-council/major-projects-office/about-us.html

7) Mining.com, *PDAC: Canada will be G20's quickest on mining permits, Natural Resources Minister vows*, 2026. https://www.mining.com/pdac-canada-will-be-g20s-quickest-on-mining-permits-natural-resources-minister-vows/

8) Government of Canada, *The Canadian Critical Minerals Strategy*. https://www.canada.ca/en/campaign/critical-minerals-in-canada/canadian-critical-minerals-strategy.html

9) British Columbia Ministry of Mining and Critical Minerals, *B.C.'s Critical Minerals Strategy*, 2025. https://www2.gov.bc.ca/assets/gov/farming-natural-resources-and-industry/mineral-exploration-mining/bc-geological-survey/critical-minerals/phase_1_bc_critical_minerals_-_digital.pdf

10) Government of British Columbia, *Infrastructure Projects Act*. https://www2.gov.bc.ca/gov/content/governments/infrastructure/infrastructure-projects-act

- Ontario's *Protect Ontario by Unleashing Our Economy Act*[11] establishes special economic zones and advances a "*One Project, One Process*"[12] model to cut approval times for major resource projects.
- Quebec is updating its regulatory framework through *Bill 63 (An Act to amend the Mining Act)*[13], while leveraging hydropower and industrial incentives to attract battery metal processing and extraction.
- Nova Scotia introduced a phased industrial approval process[14] to accelerate metal-mining projects following environmental assessment.
- Saskatchewan is strengthening its investment appeal through a dedicated *Critical Minerals Strategy*[15] with incentives for exploration and processing, alongside the *Mineral Resources Amendment Act, 2025*[16], which allows the creation of subsurface development areas and enhances regulatory clarity for project proponents.
- Alberta is updating its minerals legislation under its *Minerals Strategy and Action Plan*[17] and preparing a dedicated critical minerals incentive program[18] designed to draw investment and speed up development of lithium, vanadium, rare earths and other emerging minerals.
- Yukon has restructured its mining regulatory framework to improve permitting coordination and bolster the territory's investment competitiveness[19], introducing clearer approval pathways to accelerate responsible project development.

These provincial and territorial initiatives collectively reduce regulatory bottlenecks, bolster investment conditions and support long term growth in Canada's mining workforce.

11) Government of Ontario, *Protect Ontario*. https://www.ontario.ca/page/protect-ontario

12) Government of Ontario, *Mining: One Project, One Process Framework*. https://www.ontario.ca/page/mining-one-project-one-process-framework

13) Assemblée nationale du Québec, *Projet de loi no 63 – Loi modifiant diverses dispositions législatives en matière de développement économique*. https://www.assnat.qc.ca/en/travaux-parlementaires/projets-loi/projet-loi-63-43-1.html

14) Government of Nova Scotia, *New phased in approach to industrial approval process will support responsible, faster metal mining*, June 2025. https://news.novascotia.ca/en/2025/06/13/new-phased-approach-industrial-approval-process-support-responsible-faster-metal

15) Government of Saskatchewan, *Securing the Future: Saskatchewan's Critical Minerals Strategy*, 2023. https://publications.saskatchewan.ca/api/v1/products/120502/formats/139379/download

16) Government of Saskatchewan, *Saskatchewan enhances legislation to support development of resource projects*, November 2025. https://www.saskatchewan.ca/government/news-and-media/2025/november/06/saskatchewan-enhances-legislation-to-support-development-of-resource-projects

17) Government of Alberta, *Alberta Minerals Strategy and Action Plan*. https://www.alberta.ca/minerals-strategy-and-action-plan

18) Government of Alberta, *Government introduces legislation to modernize mineral development framework*, March 2026. https://www.alberta.ca/release.cfm?xID=95756DC27018A-FD98-9D26-B0484C3568CBC43A

19) Government of Yukon, *The Yukon takes decisive action to make mining more predictable*, March 2026. https://yukon.ca/en/news/yukon-takes-decisive-action-make-mining-more-predictable

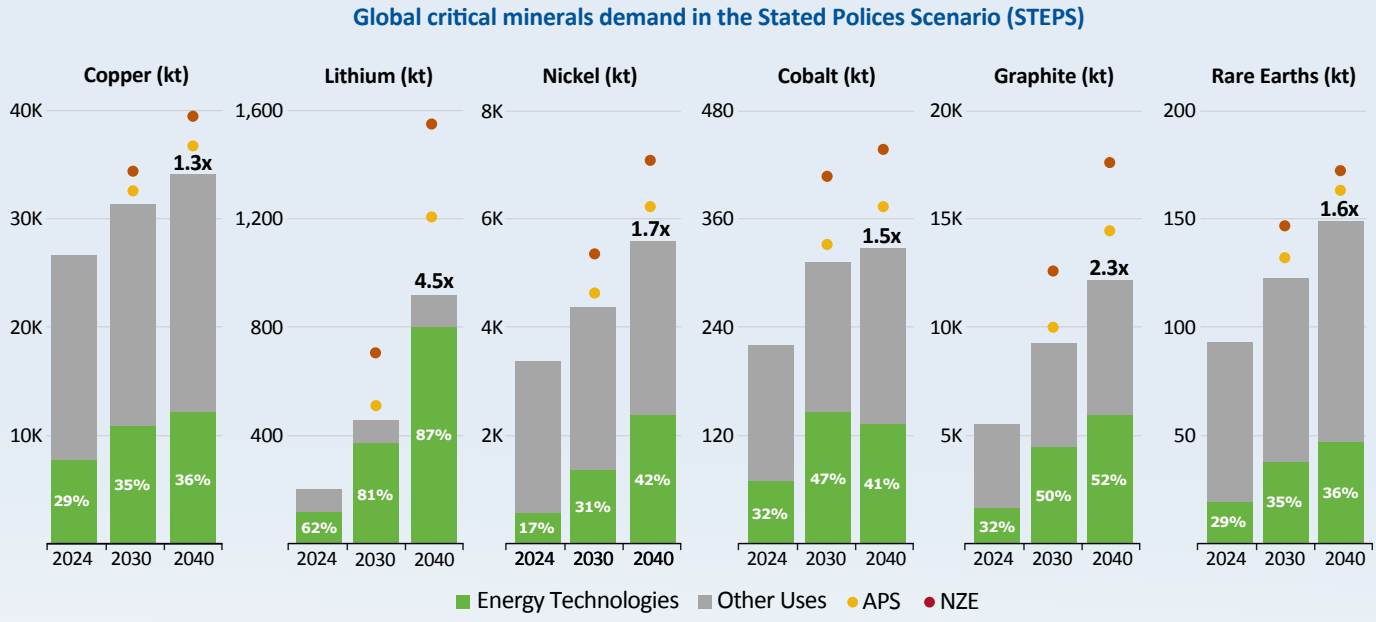
# Economic Tailwinds for Mineral Demand

Not only is Canada's mining industry ramping up capital investment and exploration spending in response to favourable market conditions, it is also receiving strong federal and provincial support. Adding to this, long-term demand for critical minerals is expected to increase substantially, providing additional momentum to mining demand.

Critical minerals such as copper, nickel and graphite are a key input across a wide variety of clean energy technologies and therefore are projected to see sustained growth in global demand. The International Energy Agency published a 2025 study projecting that on global critical mineral demand is set to grow rapidly through 2040, largely driven by energy technologies (Figure 13).

With substantial reserves of many of these minerals, Canada is well-positioned to benefit from these long-term economic tailwinds and capitalize on new opportunities for decades to come.

## Figure 13 Global Critical Minerals Demand Outlook (2024 - 2040)




*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026; International Energy Agency, Global Critical Minerals Outlook, 2025.*

*Notes: STEPS = Stated Policies Scenario; kt = kilotonnes; APS = Announced Pledges Scenario; NZE = Net Zero Emissions by 2050 Scenario. The figures for copper are based on refined copper (excluding direct-use scrap). Those for rare earth elements are for magnet rare earth elements only. Growth rates (in blue) are between 2024 and 2040.*

# 3) LABOUR MARKET FORECAST FOR CANADA'S MINING INDUSTRY

**MiHR's labour market projections aim to identify key areas where the mining industry will face workforce pressures, which is critical to ensuring a sustainable supply of skilled labour that can meet the evolving needs of the industry.**

### MiHR's labour market projections provide this insight by examining three core questions:

**A. What will labour demand look like in the decade ahead?**
MiHR's industry employment forecast estimates the demand for labour (i.e., the optimal employment level) across mining industry sub-sectors over the next 10 years (2026 to 2035).

**B. What workforce adjustments will be required to achieve the optimal level of industry employment?**
The industry's employment level, at any given time, is sustained by ongoing recruitment efforts. MiHR's forecast of hiring requirements estimates the cumulative workforce adjustments that will be necessary to maintain the optimal level of employment over the next decade.

**C. How difficult will it be to meet the required workforce adjustments?**
The industry's ability to satisfy its hiring requirements will depend on the number of new workers (i.e., graduates, migrants, etc.) entering mining-related occupations. A healthy labour market will draw enough entrants to offset future hiring pressures.

## a) Future Labour Demand

Central to MiHR's analysis of the mining labour market is a forecast of industry employment over a 10-year horizon. MiHR uses a time-series econometric model, which considers historic patterns and various leading explanatory factors to predict future employment levels in four mining sub-sectors. For each sub-sector, the best fitted model was selected based on a range of statistical performance metrics and diagnostic criteria.

MiHR developed three economic scenarios to illustrate the industry's underlying volatility and how shifting market conditions may influence future employment in Canada's mining industry:

1. **Baseline scenario:**
The baseline scenario represents MiHR's central outlook for the mining industry. It considers employment trends in each sub-sector since 2003[20] and widely accepted forecasts of economic conditions and commodity prices[21], including World Bank metals and minerals price projections[22]. This scenario assumes a stable environment in which commodity prices gradually normalize and other predictors such as capital expenditures follow a more balanced path, providing a foundation for the baseline employment projection.

20) Historic employment data is from Statistics Canada's System of National Accounts (SNA) (Table: 36-10-0489-01). Employment levels cited in Section 3 differ from those in Section 1 due to use of different data sources (i.e., labour force survey versus SNA), and the use of a robust set of NAICS codes in Section 3 (see Appendix A for details).

21) World Bank, Pink Sheet Data Commodity Prices, 2026. https://www.worldbank.org/en/research/commodity-markets#1

22) Other predictive indicators include Statistics Canada's capital expenditures in mining (Table: 34-10-0035-01), Alberta Energy Regulator's oil prices and bitumen production volume, and manufacturing production volume as a proxy for downstream demand. Both lags and coincident values were considered for all indicators.

2. **Expansionary scenario:**
   The expansionary scenario reflects more favourable economic conditions than assumed in the baseline scenario. Under these conditions, commodity prices (particularly gold) follow stronger paths based on the average of several private-sector forecasts from major financial institutions.[23] A higher price environment would support higher levels of activity and employment across the mining industry. Other key predictors are assumed to follow stronger trajectories relative to the baseline.

3. **Contractionary scenario:**
   The contractionary scenario illustrates the impact of a less favourable market environment. In this case, metals and minerals prices are assumed to experience a correction similar to declines observed in past commodity cycles. Such conditions would lead to reduced industry activity and employment levels below the baseline. Other key predictors are assumed to weaken relative to the baseline.

Taken together, these scenarios present a range of possible future conditions. That said, MiHR's forecast implicitly assumes that future trends will follow patterns observed in the past. Although these scenarios address some of the uncertainty, projections remain limited as the model cannot anticipate unpredictable events or unexpected shocks that may arise over the forecast period.

## Mining Employment Outlook

Figure 14 illustrates the overall mining industry employment outlook (historical and forecasted).

Mining employment has maintained an upward trend, expanding from 108,570 in 2003 to 208,530 in 2025 (a 92% increase in over two decades).

MiHR's baseline forecast to 2035 anticipates that the mining workforce will continue to grow in the long-term to 242,400 workers (a 16% increase). Under the expansionary scenario, employment is projected to increase to 294,920 workers (a 41% increase), whereas under the contractionary scenario, employment is projected to decrease to 189,950 workers (a 9% decrease).

## CHANGES TO THIS YEAR'S FORECAST MODEL

Forecasting in *MiHR's Canadian Mining Outlook (2026)* may differ from previous versions due to adjustments in underlying methodology, industry definition and data sources. The highly uncertain economic environment of the past few years has especially challenged economic forecasting models. MiHR has made certain adjustments for key data inputs in 2026:

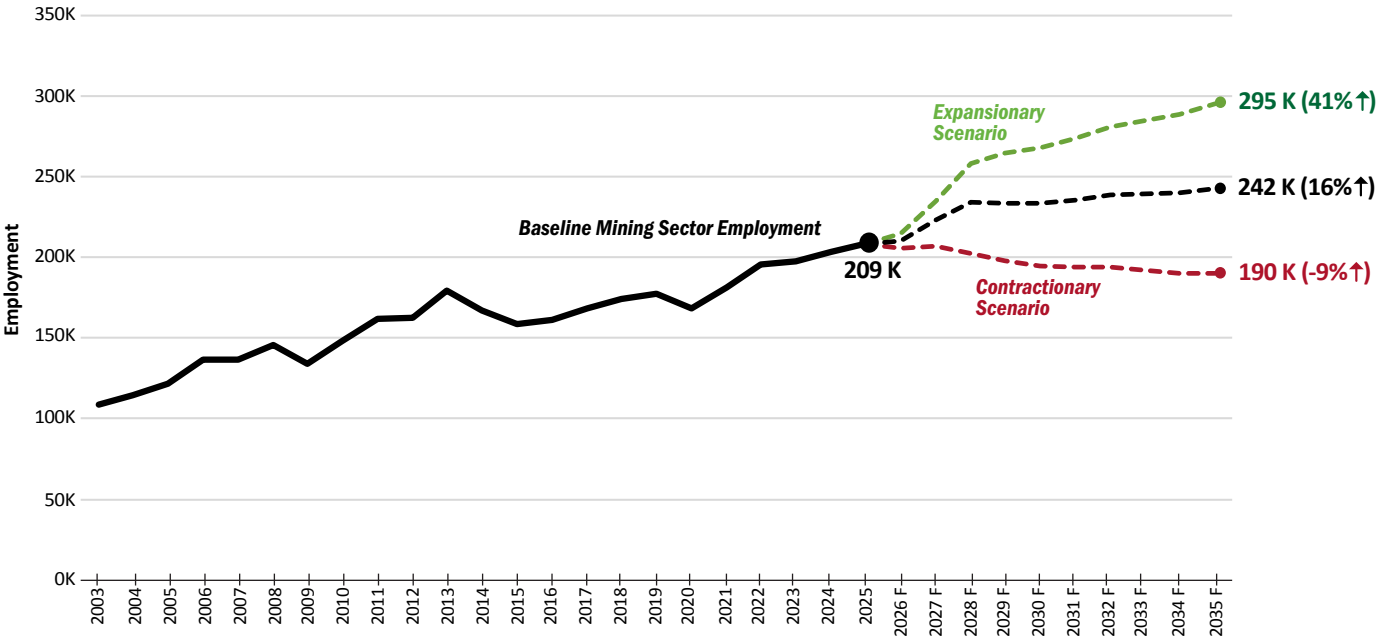
- In the 2024 forecast, *Extraction and Milling* combined mineral and metal mining with *Oil Sands Mining*. Because these two activities have diverged significantly in recent growth and long-term outlook, this year's forecast separates *Oil Sands Mining* into its own sub-sector. As a result, each now follows an independent time series and set of explanatory variables throughout the model and the broader report.
- The previous forecast used statistical prediction intervals to generate expansionary outcomes. This year's expansionary scenario is anchored in market-based expectations and uses consensus projections of the main explanatory variables (e.g., the average of several private-sector gold price forecasts from major financial institutions). This provides a more realistic representation of stronger-than-baseline economic conditions.
- Similarly, the contractionary scenario no longer uses a lower-bound statistical prediction interval. Instead, it reflects a commodity price correction consistent with declines observed during past market cycle downturns, offering a historically grounded view of downside risk, with other key predictors also assumed to follow a weaker path relative to the baseline.

Collectively, these updates reflect the shifts in economic expectations and data availability since MiHR's 2024 employment forecast. In particular, the change in scenario modelling and the separation of *Oil Sands Mining* both contribute to differences in projected employment paths that were not present in last report's outlook. As a result, this forecast offers an improved foundation for understanding the industry's current and future labour dynamics.

23) The private-sector average reflects gold price forecasts from several leading financial institutions, including BMO Capital Markets, J.P. Morgan, RBC Capital Markets, TD Economics, CIBC Capital Markets, Bank of America Global Research, Goldman Sachs Research, and other consensus estimates.

*Photo source: Camus Photography*

## Figure 14 Historical and Forecasted Employment in the Mining Industry (2003 – 2035)




*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026. Statistics Canada, System of National Accounts, 2026.*

*Note: Due to data unavailability, 2025 employment levels were estimated using Statistic Canada's monthly Labour Force Survey and anchored to SNA employment levels to account for survey inconsistencies.*

The updated 2026 forecast shows rapid employment growth in the short-term followed by slower but sustained growth for the industry based on relatively strong economic conditions and elevated commodity prices.

## Employment Outlook by Mining Sub-sector

Figure 15 illustrates the employment outlook for the mining industry broken down by its four main sub-sectors: *Extraction and Milling*, *Oil Sands Mining*, *Mining Support Services* and *Primary Metal Manufacturing*[24].

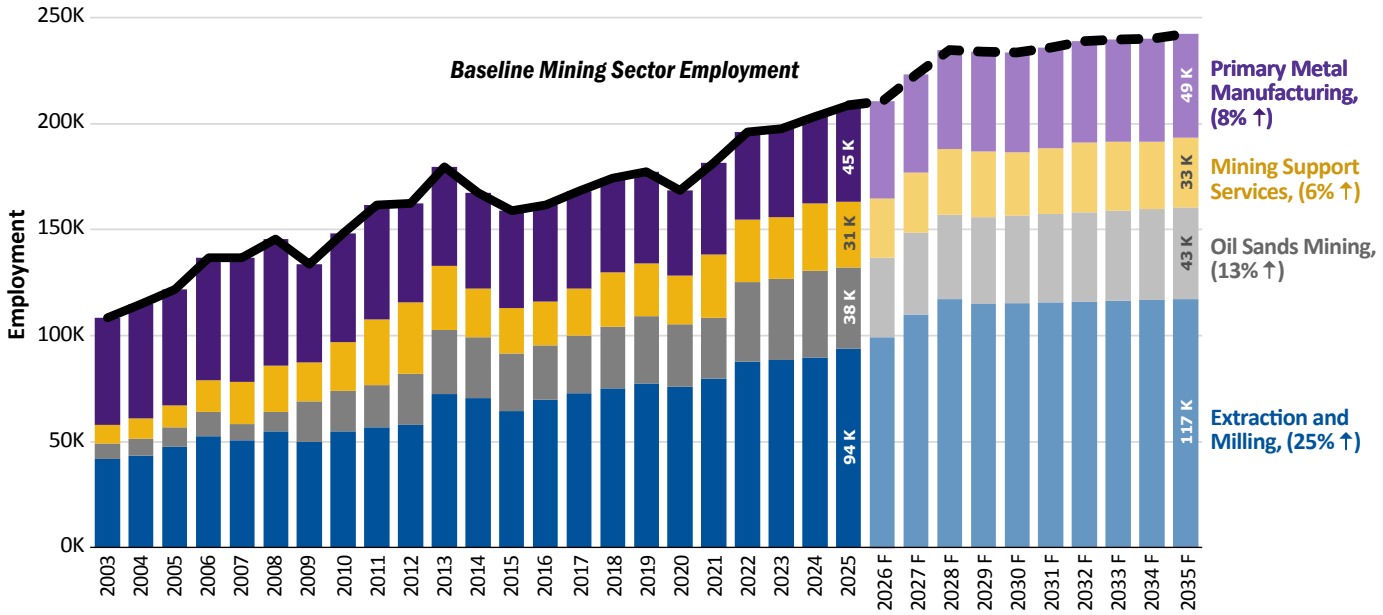
*Extraction and Milling* workers make up the largest segment of the mining industry (about 45% in 2025), followed by *Primary Metal Manufacturing* workers (about 22% in 2025), *Oil Sands Mining* workers (about 18% in 2025) and *Mining Support Services* workers (about 15% in 2025) (Table 1).

Historically, employment in Canada's mining industry has tended to increase overall, though the pace of growth has varied considerably by sub-sector. Over the past 20 years, employment in *Oil Sands Mining* has more than tripled, while *Extraction and Milling* and *Mining Support Services* have both roughly doubled. Over the same period, employment in *Primary Metal Manufacturing* has declined by about 20%.

1. *Extraction and Milling* is estimated to increase substantially by about 25% from 94,010 workers in 2025 to 117,230 workers in 2035.
2. *Oil Sands Mining* is estimated to increase moderately by 13%, from 38,080 workers in 2025 to 43,060 workers in 2035.
3. *Mining Support Services* is estimated to increase slightly by 6%, from 31,180 workers in 2025 to 33,100 workers in 2035.
4. *Primary Metal Manufacturing* is estimated to increase slightly by 8%, from 45,260 workers in 2023 to 49,000 workers in 2035.

24) Figure 15 shows the baseline forecast across the four mining sub-sectors. For expansionary and contractionary scenarios by sub-sector, see Appendix B.

## Figure 15 Historical and Forecasted Employment in Mining Sub-sectors (2003 – 2035)




*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026.*

## Table 1 Share of Mining Workforce and Projected Employment Growth in Mining Sub-sectors (2025)

| Mining Sub-sector | 2025 Share of Mining Workforce | 2025 Employment | 2035 Baseline Employment |
|---|---|---|---|
| Extraction and Milling | 45% | 94,010 | 117,230 |
| Oil Sands Mining | 18% | 38,080 | 43,060 |
| Mining Support Services | 15% | 31,180 | 33,100 |
| Primary Metal Manufacturing | 22% | 45,260 | 49,000 |

*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026.*

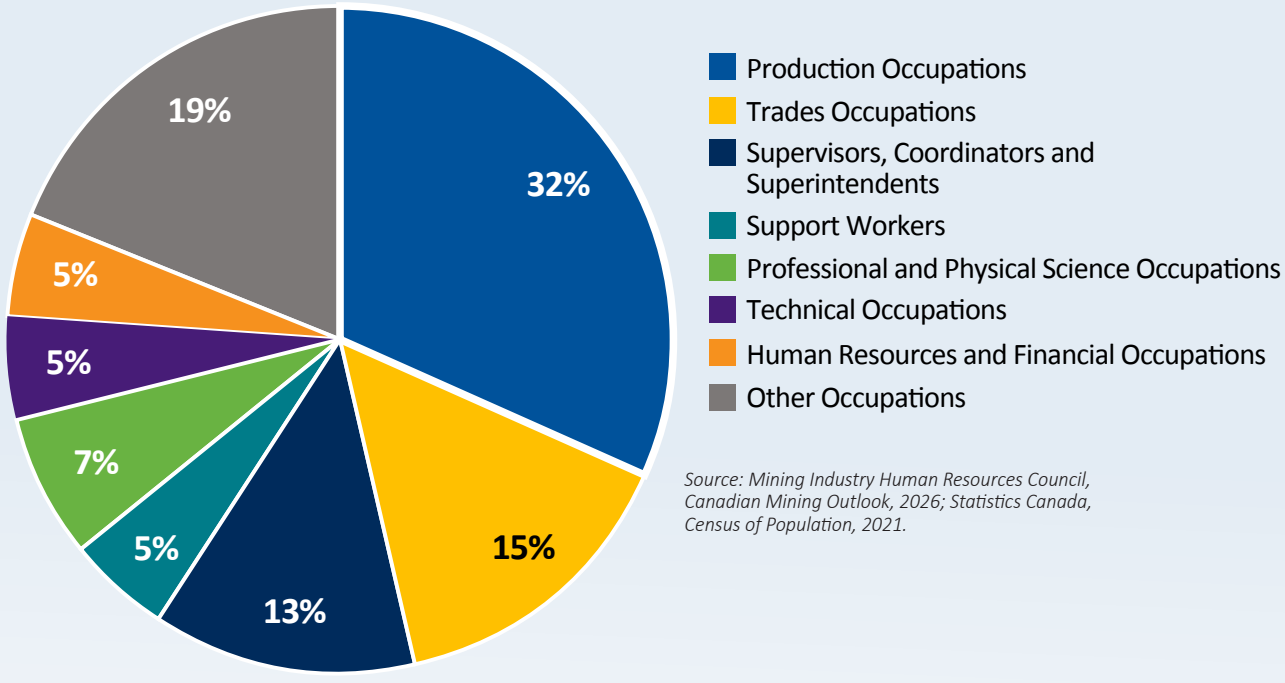
## Occupational Mix

Forecasting for specific occupations depends on the mining industry's 'occupational mix,' which describes the combination of critical jobs that are expected to comprise future labour demand.

MiHR has identified 100 occupations aligned with the *National Occupational Classification (NOC) 2021* system considered to be the most relevant to the mining industry. These are then grouped into one of seven broad occupational categories ranging from occupations in production and operations, such as *Heavy equipment operators [NOC 73400]*, to occupations in professional and physical sciences, such as *Geoscientists and oceanographers [NOC 21102]* (see *Appendix A* for the full list).

As reported by the 2021 Census, the largest segment is *Production Occupations*, which comprises about 32% of all mining labour demand, followed by *Trades Occupations* (15%) and *Supervisors, Coordinators and Superintendents* (13%) (Figure 16). Table 2 reports the top 10 occupations in each mining sub-sector by share of employment. For the purposes of this analysis, MiHR assumes the occupational mix will reflect the historical data and remain consistent over the forecasting period.[25]

**Figure 16 Share of Employment by Occupational Category (2021)**




*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026; Statistics Canada, Census of Population, 2021.*

25) Note that the occupational mix is constantly in flux as demand for different occupations will rise and fall depending on where mining projects are in the mining life cycle and macroeconomic conditions. In addition, this could change radically with new technology and increased demand for critical minerals. The baseline forecast assumes that operations are more likely to adhere to the status quo.

## Table 2 Top 10 Occupations by Share of Employment in Mining Sub-sectors (2021)

| | EXTRACTION AND MILLING | | OIL SANDS MINING | | MINING SUPPORT SERVICES | | PRIMARY METAL MANUFACTURING | |
|---|---|---|---|---|---|---|---|---|
| Rank | Position | Share of Total | Position | Share of Total | Position | Share of Total | Position | Share of Total |
| 1 | Underground production and development miners | 11.6% | Central control and process operators, petroleum, gas and chemical processing | 6.4% | Contractors and supervisors, oil and gas drilling and services | 6.6% | Machine operators, mineral and metal processing | 9.3% |
| 2 | Heavy equipment operators | 9.9% | Heavy equipment operators | 4.8% | Transport truck drivers | 6.4% | Construction millwrights and industrial mechanics | 6.7% |
| 3 | Supervisors, mining and quarrying | 6.4% | Financial auditors and accountants | 3.5% | Oil and gas drilling, servicing and related labourers | 5.0% | Labourers in mineral and metal processing | 5.3% |
| 4 | Construction millwrights and industrial mechanics | 5.2% | Power engineers and power systems operators | 3.1% | Oil and gas well drillers, servicers, testers and related workers | 4.1% | Manufacturing managers | 4.2% |
| 5 | Transport truck drivers | 4.5% | Mining engineers | 2.9% | Underground production and development miners | 3.7% | Supervisors, mineral and metal processing | 4.2% |
| 6 | Heavy-duty equipment mechanics | 4.4% | Central control and process operators, mineral and metal processing | 2.8% | Heavy equipment operators | 3.5% | Crane operators | 3.4% |
| 7 | Underground mine service and support workers | 3.2% | Managers in natural resources production and fishing | 2.3% | Oil and gas well drilling and related workers and services operators | 3.0% | Welders and related machine operators | 3.4% |
| 8 | Managers in natural resources production and fishing | 2.7% | Supervisors, mining and quarrying | 2.2% | Managers in natural resources production and fishing | 2.9% | Industrial electricians | 2.9% |
| 9 | Industrial electricians | 2.5% | Construction millwrights and industrial mechanics | 2.1% | Supervisors, mining and quarrying | 2.4% | Metalworking and forging machine operators | 2.6% |
| 10 | Geological and mineral technologists and technicians | 2.3% | Geoscientists and oceanographers | 1.9% | Central control and process operators, petroleum, gas and chemical processing | 2.3% | Material handlers | 2.2% |

*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026; Statistics Canada, Census of Population, 2021.*

# b) Workforce Adjustments

MiHR considers two main factors that contribute to mining workforce adjustments: *net change in employment* and *expected exits*. Net change in employment describes changes in labour demand due to industry expansion or contraction. Expected exits refer to individuals leaving Canada's mining industry, either through retirement, industry-migration or other avenues.

## Adjustments from Net Change in Employment

Using MiHR's employment forecast, the cumulative net change in employment is calculated for mining sub-sectors and broad occupational categories across the three economic scenarios – contractionary, baseline and expansionary.

## Net Change in Employment by Sub-sector

Table 3 shows the cumulative net change in employment for each mining sub-sector over the forecasted 10-year horizon (2026 - 2035). Under the baseline scenario, the mining industry is expected to employ 33,866 additional workers (about a 16% increase from 2025) over the forecast period.[26] This substantial expansion reflects the current growth momentum and favourable commodity price environment for mining activity.

Among the four sub-sectors, *Extraction and Milling* is expected to grow the most over the next decade with an addition of 23,221 workers (about a 25% growth from 2025) under the baseline scenario. *Oil Sands Mining*, *Primary Metal Manufacturing* and *Support Services* are also projected to grow, though to a lesser extent, with 13%, 8% and 6% growth respectively.

**Table 3** Forecast Scenarios of Cumulative Net Change in Employment by Mining Sub-sector (2026 - 2035)

| | Contractionary | Baseline | Expansionary |
|---|---|---|---|
| **Extraction and Milling** | 323 | 23,221 | 44,168 |
| **Oil Sands Mining** | -6,572 | 4,980 | 15,658 |
| **Mining Support Services** | -8,366 | 1,926 | 14,003 |
| **Primary Metal Manufacturing** | -3,958 | 3,738 | 12,559 |
| **All Mining Sub-sectors** | **-18,573** | **33,866** | **86,388** |

*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026.*

26) Differences from the 2024 forecast are due to recent volatility in several variables, particularly mineral and metal prices, which greatly impact cumulative net change in employment in the near-term part of the forecast.

## Net Change in Employment by Occupation

Table 4 shows the cumulative net change in employment for each broad occupational category over the forecasted 10-year horizon (2026 - 2035). *Production occupations* are expected to experience the largest increase under the baseline and expansionary scenarios, but also the greatest reduction under the contractionary scenario, mainly due to its size and sensitivity to mining workforce developments. Under the baseline scenario, the industry is anticipated to increase 10,900 workers (a 16% increase from 2025) in this occupational category.

**Table 4** **Forecast Scenarios of Cumulative Net Change in Employment by Occupational Category (2026 - 2035)**

| | Contractionary | Baseline | Expansionary |
|---|---|---|---|
| **Human Resources and Financial Occupations** | -862 | 1,571 | 4,007 |
| **Production Occupations** | -5,978 | 10,900 | 27,804 |
| **Professional and Physical Science Occupations** | -1,255 | 2,288 | 5,836 |
| **Supervisors, Coordinators and Superintendents** | -2,384 | 4,347 | 11,088 |
| **Support Workers** | -1,010 | 1,842 | 4,698 |
| **Technical Occupations** | -860 | 1,568 | 4,000 |
| **Trades Occupations** | -2,700 | 4,922 | 12,557 |
| **Other Occupations**[27] | -3,525 | 6,428 | 16,398 |
| **All Occupations** | **-18,573** | **33,866** | **86,388** |

*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026.*

## Adjustments from Exits

Employee exits are a common and ongoing occurrence for all industries and the mining industry is no exception. Workers exit the mining labour force for various reasons. MiHR's forecasting captures two main categories of exits: (1) Mining labour force exits (retirements) and (2) Mining industry exits.

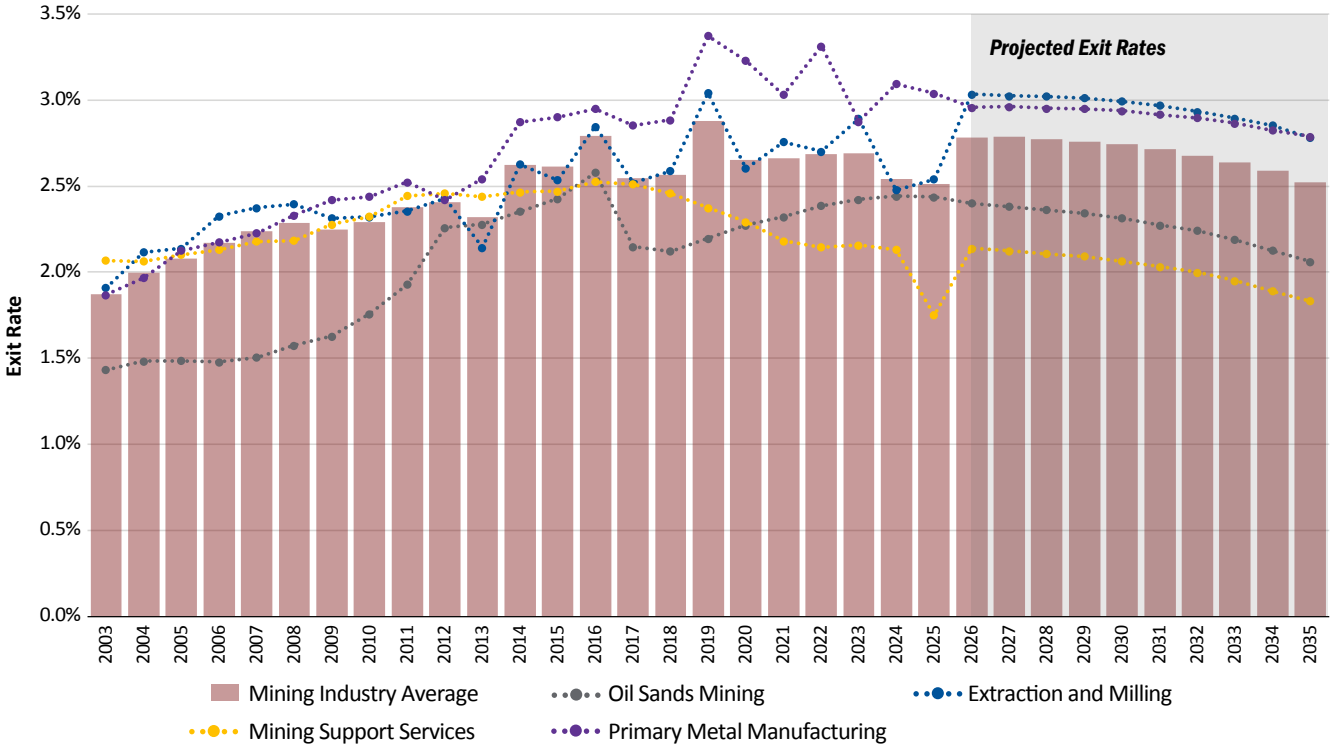
***Mining labour force exits (retirements)*** estimates the number of individuals exiting the labour force altogether. Most labour force exits are primarily due to retirement, but may also include other reasons such as going back to school, starting maternity/paternity leave, etc. Labour force exits describe former mining industry participants who are no longer in the labour force.

MiHR's model of labour force exits considers demographic characteristics to estimate the share of workers anticipated to withdraw from the mining labour force over time.[28] Labour force exits in mining sub-sectors have increased as the baby-boom cohort reaches peak retirement age and are projected to stabilize and ease slightly in the latter 2020s. From 2026 to 2035, the mining industry's average labour

27) *Other Occupations* refers to a large group of occupations not necessarily exclusive to mining operations and outside the critical occupations targeted in this analysis, but employed by the industry nonetheless (e.g., registered nurses, light duty cleaners, security guards, etc.)

28) Differences between estimates of exit and entry rates in this report and those published in the 2024 edition reflect methodological improvements and harmonization across data sources. As a result, historical levels may appear slightly higher, while trends and conclusions remain consistent.

## Figure 17 Historic and Forecasted Labour Force Exit Rates by Mining Sub-sector (2003 - 2035)




*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026.*

force exit rate is estimated to be 2.7% per year (Figure 17). Among mining sub-sectors, *Extraction and Milling* and *Primary Metal Manufacturing* exhibit the highest exit rates, while *Mining Support Services and Oil Sands Mining* tend to follow a lower trend.

***Mining industry exits*** estimates the number of individuals leaving the mining industry to work in another industry. Although cross-industry mobility is a normal and ongoing reality, every exit generates hiring pressures for employers.

Given that information related to industry exits is rather sparse, MiHR has relied on limited available literature to estimate a reasonable industry exit rate over the forecast period. Notable information includes historical turnover data previously collected by MiHR, the US Bureau of Labour Statistics and historical data from the Survey of Labour and Income Dynamics (SLID).[29]

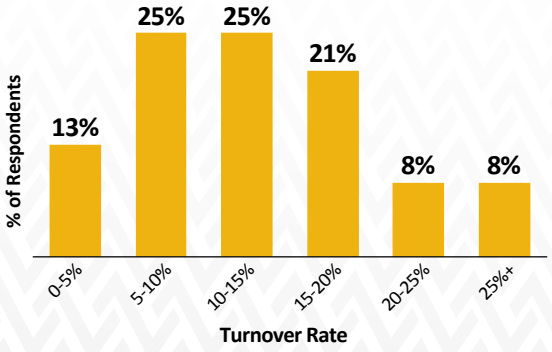
MiHR's forecast assumes the annual industry exit rate will range between 6% - 7% in the four mining sub-sectors. For occupational categories, the forecast assumes a couple of deviations: 8% for *Production occupations* and 5% for *Human Resources* and *Financial Occupations*, *Professional* and *Physical Science occupations* and *Supervisors*, *Coordinators* and *Superintendents*.

29) Notable resources consulted include: Xuyang Chen and Maxime Fougère (2009) *Inter-provincial and Inter-industry Labour Mobility in Canada, 1994-2005*, the Survey of Labour and Income Dynamics (SLID) (Note that SLID has since been discontinued in 2011), and the US Bureau of Labour Statistics forecast of "occupational separations (2021-2031)" (https://www.bls.gov/emp/documentation/separations.htm).

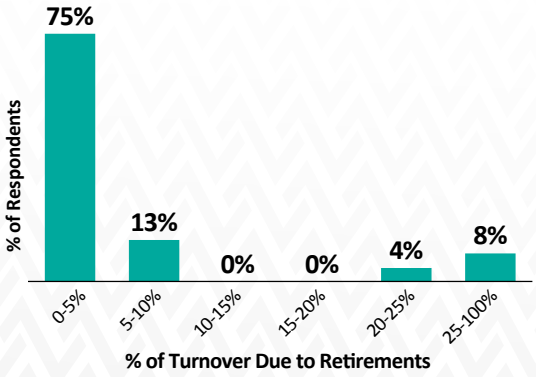
# Mining Employer's Perspective: Turnover

Nearly two-thirds of employers reported a turnover rate between 0% and 15%. Three-quarters indicated that 5% or less of their turnover was attributable to retirements.

***Over the last 12 months, what was the turnover rate for your mining operations?***




***Over the last 12 months, what percentage (%) of turnover was due to retirements?***



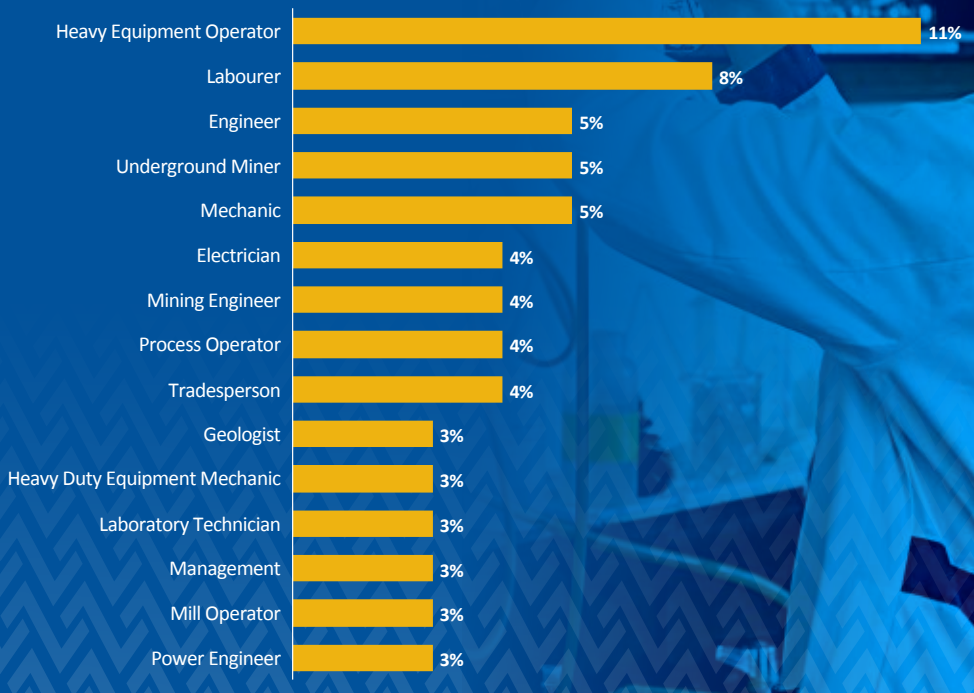

*(Sample size = 24 of 28)*

** Turnover rate is defined as the total number of employee departures—including retirements, resignations, layoffs, etc.—divided by the average number of employees over the same period.*

# Mining Employer's Perspective: Occupational Turnover

According to employers, Heavy Equipment Operators, Labourers and Engineers were among the most frequently cited positions with the highest turnover.

***Over the last 12 months, which occupations had the highest turnover? (Please list up to five positions/occupations)***



## Hiring Requirements

MiHR's forecast of hiring requirements gauges the human resource efforts required to ensure that, over time, the forecasted mining industry employment (Figure 14) is attained. The hiring requirement is estimated as the sum of net change in employment, mining labour force exits and mining industry exits, each of which create hiring pressures for the industry.

Table 5 presents industry-wide cumulative hiring requirements for the forecast period, under the three economic scenarios. The projected 10-year cumulative hiring requirements are as follows: 246,422 workers for the baseline scenario; 328,997 workers for the expansionary scenario; and 160,967 workers for the contractionary scenario. The majority of hiring requirements are expected to come from replacing exiting workers.

### Table 5 Forecast Scenarios of Cumulative Hiring Requirements in Mining (2026 - 2035)

| | | Contractionary | Baseline | Expansionary |
|---|---|---|---|---|
| **Cumulative Net Change in Employment** | | -18,573 | 33,866 | 86,388 |
| **Replacement Requirements** | **Cumulative Labour Force Exits** | 53,000 | 62,686 | 71,491 |
| | **Cumulative Industry Exits** | 126,540 | 149,870 | 171,118 |
| **Cumulative Hiring Requirements** | | **160,967** | **246,422** | **328,997** |

*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026.*

### *Hiring Requirements by Sub-sector*

Table 6 provides the cumulative hiring requirements for the forecast period for each sub-sector, under the three economic scenarios. *Extraction and Milling* is expected to make up the vast majority of the hiring requirements with 131,345 additional workers needed under the baseline scenario.

### Table 6 Forecast Scenarios of Cumulative Hiring Requirements by Mining Sub-sector (2026 - 2035)

| | Contractionary | Baseline | Expansionary |
|---|---|---|---|
| **Extraction and Milling** | 92,573 | 131,345 | 165,954 |
| **Oil Sands Mining** | 20,618 | 39,070 | 55,205 |
| **Mining Support Services** | 12,058 | 27,456 | 44,863 |
| **Primary Metal Manufacturing** | 35,718 | 48,551 | 62,974 |
| **All Mining Sub-sectors** | **160,967** | **246,422** | **328,997** |

*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026.*

***Hiring Requirements by Occupation***

Table 7 provides the cumulative hiring requirements for the forecast period for each broad occupational category, under the three economic scenarios. *Production occupations* is expected to constitute the bulk of hiring requirements with a requirement of 91,615 additional workers under the baseline scenario.

**Table 7** **Forecast Scenarios of Cumulative Hiring Requirements by Occupational Category (2026 - 2035)**

| | Contractionary | Baseline | Expansionary |
|---|---|---|---|
| **Human Resources and Financial Occupations** | 6,041 | 9,742 | 13,333 |
| **Production Occupations** | 62,194 | 91,615 | 119,938 |
| **Professional and Physical Science Occupations** | 8,902 | 14,311 | 19,558 |
| **Supervisors, Coordinators and Superintendents** | 17,076 | 27,384 | 37,381 |
| **Support Workers** | 8,210 | 12,757 | 17,156 |
| **Technical Occupations** | 7,972 | 12,024 | 15,935 |
| **Trades Occupations** | 22,366 | 34,598 | 46,428 |
| **Other Occupations** | 28,206 | 43,992 | 59,270 |
| **All Occupations** | **160,967** | **246,422** | **328,997** |

*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026.*

# c) Relative Difficulty of Workforce Adjustments

MiHR's gap analysis investigates whether new entrants to mining-related occupations can adequately offset future hiring requirements. A shortfall of new entrants points to potential risks for mining operations; a thin labour supply can derail projects, drive up the cost of finding workers and ultimately undermine an operation's ability to continue to run competitively.

## Expected Entries

Entries represent the opportunity to neutralize the pressures and costs associated with hiring; that is, the burden of replacing a worker lessens if there is an abundant availability of qualified candidates. MiHR's model of expected entrants provides a forecast of new entrants to the mining labour market. Counter to the expected exits, MiHR considers two parallel categories of entries: (1) Mining labour force entries and (2) Mining industry entries.

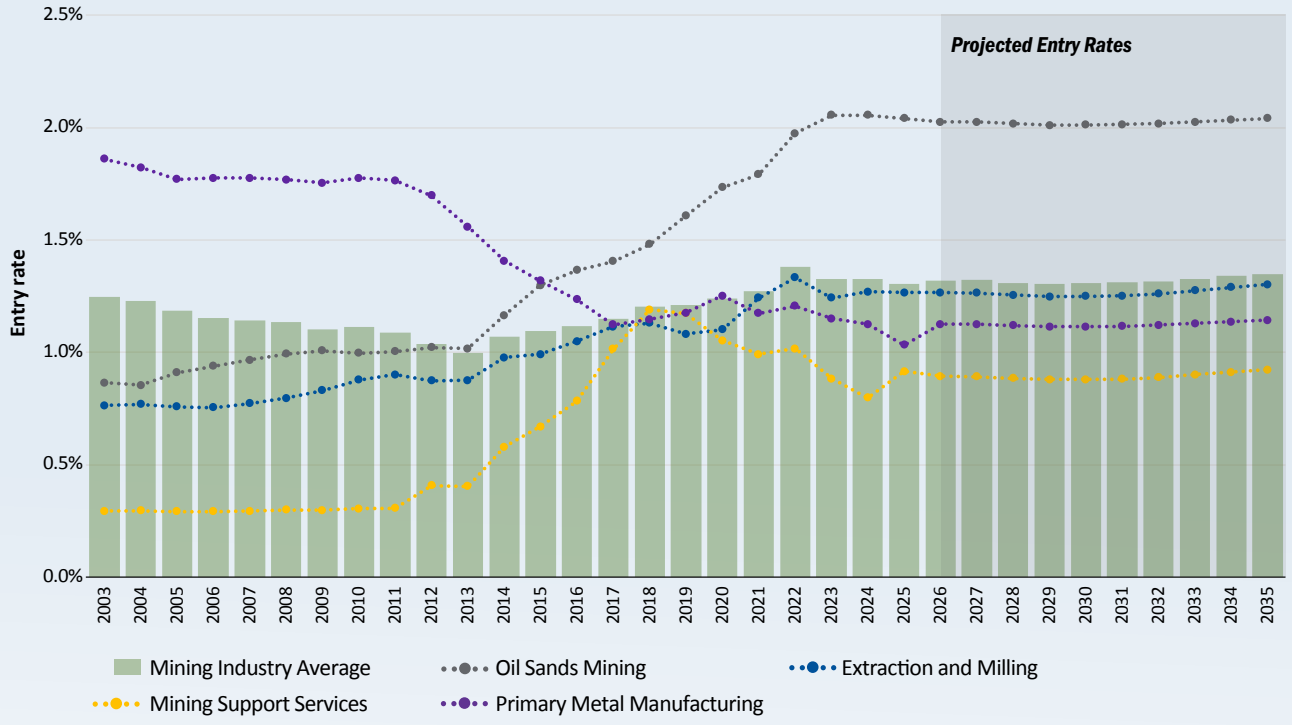
### *Mining Labour Force Entries*

A model of labour force entries covers a variety of entry points. Firstly, students transitioning from school into the labour force comprise most new entrants, but labour force entries are inclusive of all cases of people joining the labour force (i.e., non-students who were previously not in the labour force for any reason).

The method for estimating labour force entries is the same as labour force exits (See "Adjustments from Exits"), except the focus is on individuals' likelihood of entering the mining labour force, based on historical trends and their key demographic characteristics.

From 2026 to 2035, the average labour force entry rate is expected to be 1.3% per year in the mining industry (Figure 18). Among mining sub-sectors, *Mining Support Services* shows the lowest expected entry rates, suggesting that this group will face the greatest pressure to obtain new entrants for its workforce.

**Figure 18** **Historic and Forecasted Labour Force Entry Rates by Mining Sub-sector (2003 - 2035)**




*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026.*

### *Mining Industry Entries*

Mining industry entries are parallel to the previously derived mining industry exits. As workers continually switch roles throughout their working life, one industry's entry also represents another's exit. The key question is whether transfers between industries are in balance. If exits to other industries consistently surpass entries, the mining workforce will experience attrition over time.

This balance of industry exits and entries will depend on the economic push and pull of different industries through their cycles over time. Therefore, MiHR considers three scenarios of mining industry entries based on their degree of balance with mining industry exits. To cover the range of possibilities in the forecast, three scenarios describe industry entries as follows:

1. Balanced scenario: Industry entries equal industry exits.
2. Inflow Scenario: Industry entries exceed industry exits (+2%).
3. Outflow Scenario: Industry entries fall behind industry exits (-2%).

## Gap Analysis and Labour Market Tightness

MiHR's gap analysis combines hiring requirements with forecasts of entries into one comparative analysis of sub-sector and broad occupational categories. A hiring gap occurs when expected entries are unable to cover the forecasted hiring needs. Hires that stretch beyond the obtainable labour supply represent an additional burden to employers to increase their effort to meet their labour demand.

A hiring gap further provides a signal of labour market tightness in the long-term view. Unlike short term tightness, where certain economic factors are cyclical and likely to resolve over time, long-term tightness anticipates an un-reversing trend led by long-term demographic and economic factors.

### *Gap Analysis for the Mining Industry*

A gap-sensitivity analysis for the mining industry is presented in Table 8. The table highlights a range of outcomes for the projected gap (i.e., expected entrants minus hiring requirements) depending on three scenarios for mining employment (baseline, contractionary and expansionary) and three scenarios of balance between industry exits and entrants (balanced, industry inflow and industry outflow). The scenario with the largest gap is shown to be the *expansionary x industry outflow* scenario, meaning industry employment is projected to grow aggressively while industry exits will surpass industry entries by 2%.

**Table 8 Forecast Scenarios of Hiring Gap in Mining (2026 - 2035)**

| | Contractionary | Baseline | Expansionary |
|---|---|---|---|
| Industry Inflow | 30,992 | -49,658 | -127,855 |
| Balanced | 14,938 | -65,712 | -143,909 |
| Industry Outflow | -17,072 | -97,722 | -175,919 |

*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026.*

### *Gap Analysis by Sub-sector*

Table 9 shows the gap analysis for mining sub-sectors. Selected scenarios provide a range of possible hiring gaps/surpluses over the forecast period. The gap is especially prevalent in *Extraction and Milling* under the scenario where industry exits exceed entrants (industry outflow) and labour demand follows the expansionary path. Even under the balanced baseline scenario, persistent hiring gaps across all sub-sectors point to limited capacity for industry self-correction, reinforcing the need for proactive workforce development and retention strategies over the forecast period.

## Table 9 Forecast Scenarios of Hiring Gap Analysis by Mining Sub-sector (2026 - 2035)

| | Contractionary - Industry Inflow | Baseline - Balanced | Expansionary - Industry Outflow |
|---|---|---|---|
| **Extraction and Milling** | 3,025 | -42,275 | -91,323 |
| **Oil Sands Mining** | 12,402 | -5,934 | -26,278 |
| **Mining Support Services** | 10,563 | -5,386 | -25,659 |
| **Primary Metal Manufacturing** | 5,002 | -12,117 | -32,659 |
| **All Mining Sub-sectors** | **30,992** | **-65,712** | **-175,919** |

*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026.*

Table 10 further highlights how each gap is derived under the baseline-balanced scenario: *Net change in employment + expected exits – expected entries = projected hiring gaps.*

The gap is coming primarily from *Extraction and Milling* exits; 108,123 workers are projected to exit the mining workforce, causing significant hiring pressure over the forecast period.

## Table 10 Breakdown of Baseline-Balanced Hiring Gap Analysis by Mining Sub-sector (2026-2035)

| | Net Change in Employment | Exits | Total Hiring Requirements | Expected Entries | Gap Analysis |
|---|---|---|---|---|---|
| **Extraction and Milling** | 23,221 | 108,123 | 131,345 | 89,069 | -42,275 |
| **Oil Sands Mining** | 4,980 | 34,090 | 39,070 | 33,137 | -5,934 |
| **Mining Support Services** | 1,926 | 25,529 | 27,456 | 22,069 | -5,386 |
| **Primary Metal Manufacturing** | 3,738 | 44,813 | 48,551 | 36,434 | -12,117 |
| **All Mining Sub-sectors** | **33,866** | **212,556** | **246,422** | **180,710** | **-65,712** |

*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026.*

### *Gap Analysis by Occupation*

Table 11 shows the gap analysis for broad occupational categories. Selected scenarios provide a range of possible hiring gaps/surpluses over the forecast period. The gap is especially prevalent in *Production Occupations* under the scenario where industry exits exceed entrants (industry outflow) and labour demand follows the expansionary path. Given its relative size, the gap in this category becomes a surplus under the contractionary scenario, highlighting the high sensitivity of the gaps (and surpluses) projected in this forecast.

## Table 11 Forecast Scenarios of Hiring Gap Analysis by Occupational Category (2026 - 2035)

| | Contractionary - Industry Inflow | Baseline - Balanced | Expansionary - Industry Outflow |
|---|---|---|---|
| Human Resources and Financial Occupations | 1,654 | -2,790 | -7,863 |
| Production Occupations | 9,154 | -22,133 | -57,764 |
| Professional and Physical Science Occupations | 2,335 | -4,152 | -11,552 |
| Supervisors, Coordinators and Superintendents | 3,893 | -8,532 | -22,684 |
| Support Workers | 1,765 | -3,479 | -9,458 |
| Technical Occupations | 1,437 | -3,041 | -8,144 |
| Trades Occupations | 4,152 | -9,969 | -26,045 |
| Other Occupations | 6,603 | -11,616 | -32,408 |
| **All Occupations** | **30,992** | **-65,712** | **-175,919** |

*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026.*

Table 12 further highlights how each gap is derived under the baseline-balanced scenario: *Net change in employment + expected exits – expected entries = projected hiring gaps*. The gap is coming primarily from *Production Occupations* exits; 80,715 workers are projected to exit the mining workforce, causing significant hiring pressure over the forecast.

## Table 12 Breakdown of Baseline-Balanced Hiring Gap Analysis by Occupational Category (2026 - 2035)

| | Net Change in Employment | Exits | Total Hiring Requirements | Expected Entries | Gap Analysis |
|---|---|---|---|---|---|
| Human Resources and Financial Occupations | 1,571 | 8,171 | 9,742 | 6,952 | -2,790 |
| Production Occupations | 10,900 | 80,715 | 91,615 | 69,482 | -22,133 |
| Professional and Physical Science Occupations | 2,288 | 12,023 | 14,311 | 10,159 | -4,152 |
| Supervisors, Coordinators and Superintendents | 4,347 | 23,037 | 27,384 | 18,851 | -8,532 |
| Support Workers | 1,842 | 10,915 | 12,757 | 9,277 | -3,479 |
| Technical Occupations | 1,568 | 10,456 | 12,024 | 8,984 | -3,041 |
| Trades Occupations | 4,922 | 29,675 | 34,598 | 24,629 | -9,969 |
| Other Occupations | 6,428 | 37,564 | 43,992 | 32,376 | -11,616 |
| **All Occupations** | **33,866** | **212,556** | **246,422** | **180,710** | **-65,712** |

*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026.*

## Mining Employer's Perspective: Difficult Positions to Hire

According to employers, Heavy Duty Equipment Mechanics, Electricians and Engineers were among the most frequently cited hard-to-fill positions.

***Please list up to five positions/occupations that your organization has the most difficulty hiring for or filling.***

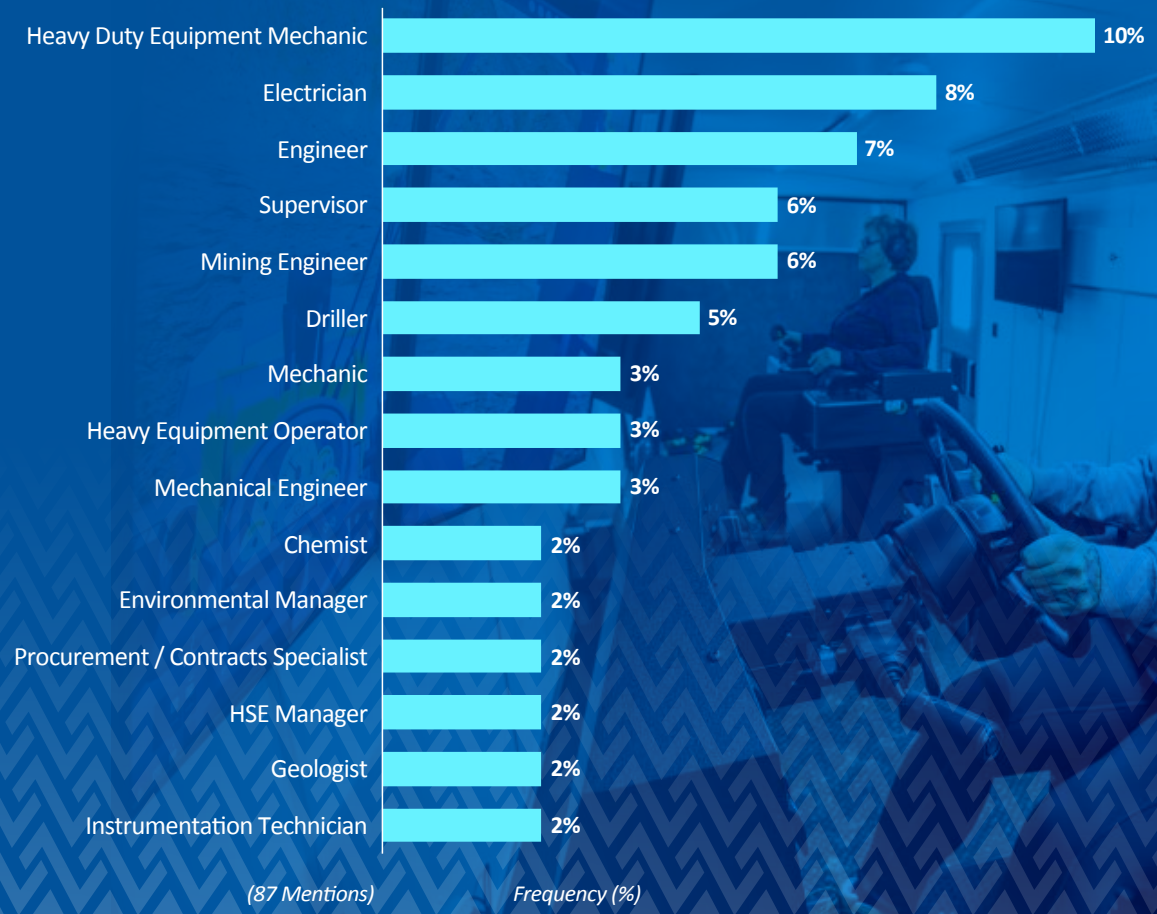


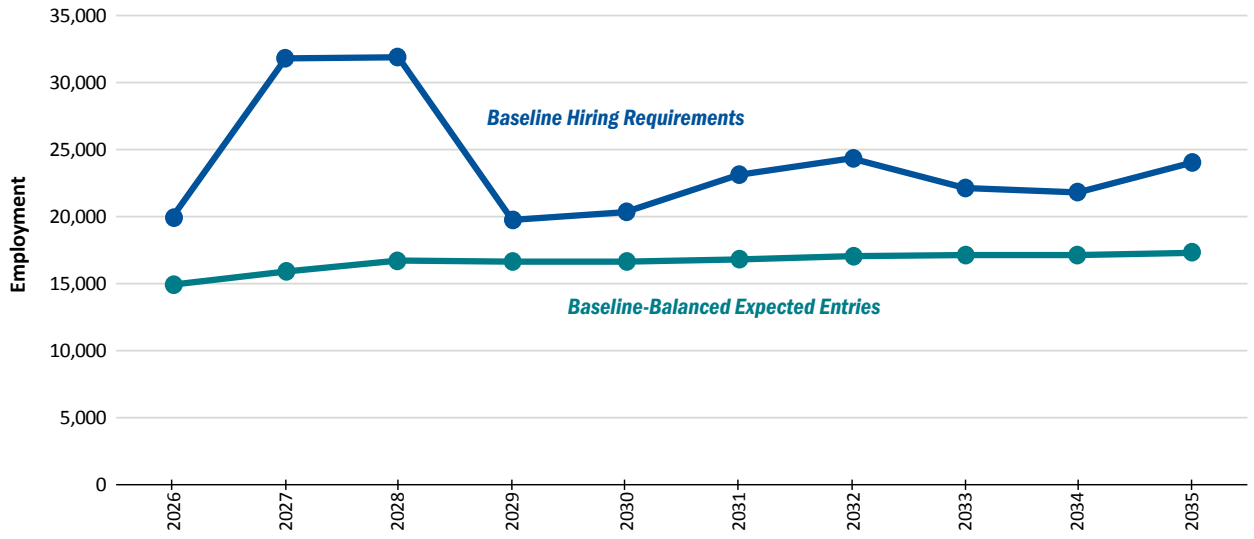

*Photo source: Camus Photography*

### Hiring Gap Intensity

Figure 19 overlays baseline hiring requirements with expected entries over the forecast period. Hiring requirements exceed expected entrants from the outset and remain higher throughout the forecast, indicating a persistent hiring gap with no period of surplus. Hiring requirements peak in 2027 and 2028 before moderating, while expected entries follow a comparatively stable and flat trend. As a result, the gap narrows but does not close, suggesting that underlying labour supply pressures persist even as demand growth stabilizes.

MiHR reports the "hiring gap intensity" – the share of hiring needs that is projected to remain unsatisfied under the status quo state. Hiring requirements become more gap intensive as the proportion of unmet hiring needs increases. In other words, the higher the gap intensity, the greater the number of vacancies that are expected to remain unfilled (or relatively difficult to fill) given the forecast of new entrants. Therefore, a high gap intensity is a sign of labour market tightness.

## Figure 19 Baseline-Balanced Scenario of Hiring Gap/Surplus in Mining (2026–2035)

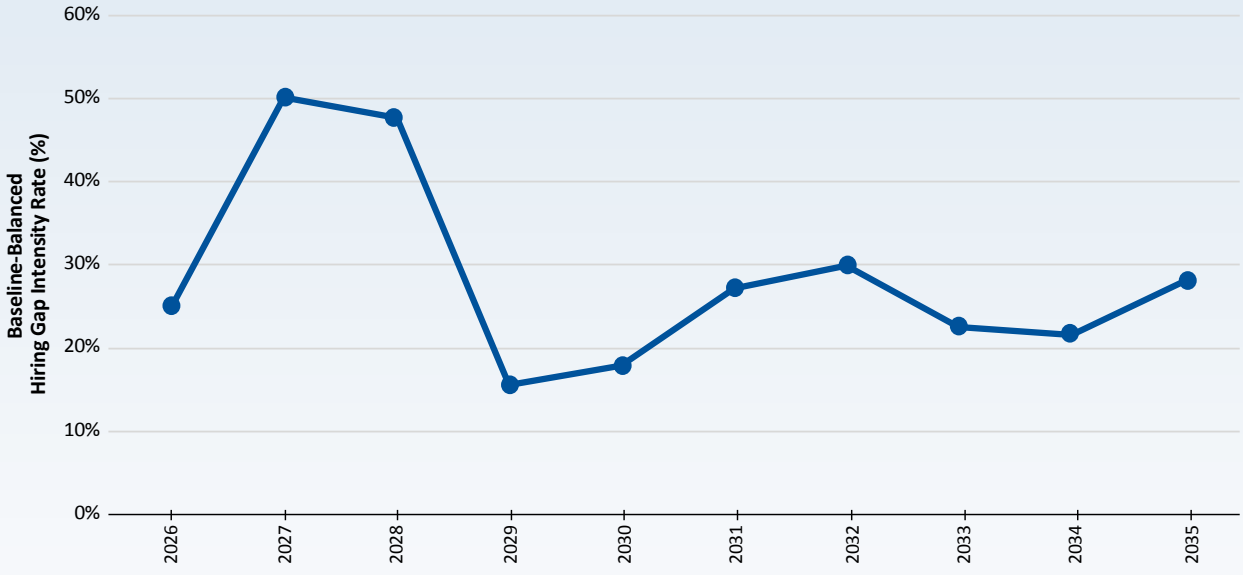



*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026.*

Hiring gap intensity, expressed as the hiring gap divided by the hiring requirements, is shown for overall mining for the forecast period (Figure 20).

The forecast points to a period of pronounced labour market tightness in 2027, when nearly half of hiring requirements are projected to be difficult to fill, due to acute near-term labour demand under the baseline forecast. Gap intensity is expected to moderate but remain elevated, with roughly 15% to 25% of hires projected to be relatively difficult to recruit over the rest of the forecast period.

## Figure 20 Baseline-Balanced Scenario of Hiring Gap Intensity in Mining (2026-2035)




*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026.*

Photo source: Rio Tinto

# CONCLUSION

**This outlook report describes the current state of Canada's mining industry, highlights positive drivers for the industry in the coming years and presents a forecast of mining labour demand and hiring requirements over the next decade.**

In 2026, the mining industry is undergoing significant expansion, driven largely by rising metals and minerals prices, specifically gold. This has resulted in historically high levels of employment in *Extraction and Milling* as well as signs of labour market tightening.

There is also surging optimism about the future of mining, with significant increases in capital expenditures and in exploration spending, setting up a runway for growth in the years to come. Furthermore, the mining industry has gained political and economic support from the federal government as well as many provincial governments, as evidenced by the several critical minerals initiatives aimed at boosting incentives and reducing regulatory friction in mineral development.

MiHR's 10-year forecast provides employment projections for the mining industry and its sub-sectors from 2026 through 2035, under three economic scenarios. The baseline scenario estimates that the mining workforce will continue to grow in the long-term to 242,400 workers (a 16% increase) by 2035, while the more bullish expansionary scenario estimates that employment will increase to 294,920 workers (a 41% increase) and the contractionary scenario projects that it will decrease to 189,950 workers (a 9% decrease).

The forecast also explores the hiring requirements that the industry is likely to face based not only on increasing demand for labour but also retirements and other industry transfers. The model estimates that the mining industry will need to make the following cumulative hiring requirements: 239,410 workers for the baseline scenario; 321,246 workers for the expansionary scenario; and 154,815 workers for the contractionary scenario.

Lastly, the forecast gauges the difficulty of filling labour gaps by measuring expected entries into the industry. The model points to a period of pronounced labour market tightness in 2027, when nearly half of hiring requirements are projected to be difficult to fill, due to acute near-term labour demand under the baseline forecast.

# Mining Employer's Perspective: Greatest Anticipated Challenges

Employers ranked finding, attracting and retaining qualified and skilled workers as the most anticipated challenge in the next five years.


*Q. Over the next five years, in your view, what do you anticipate being your biggest challenge(s) in ensuring you have the workers you need to meet your business goals? (rank from most to least challenging) (Sample size = 26 of 28)*

# APPENDICES

## Appendix A

### North American Industry Classification System (NAICS)

MiHR has aligned its definition of the mining industry to a set of NAICS codes.[30] NAICS codes are used by statistical agencies throughout North America to describe economic and business activity at the industry level.

MiHR uses the following NAICS codes to define the mining industry in the report:

#### *Extraction and Milling*

*NAICS 2121 (Coal mining)*: This industry group comprises establishments primarily engaged in mining bituminous coal, anthracite and lignite by underground mining, and auger mining, strip mining, culm bank mining and other surface mining.

*NAICS 2122 (Metal ore mining)*: This industry group comprises establishments primarily engaged in mining metallic minerals (ores). Also included are establishments engaged in ore dressing and beneficiating operations, whether performed at mills operated in conjunction with the mines served, or at mills, such as custom mills, operated separately.

*NAICS 2123 (Non-metallic mineral mining and quarrying)*: This industry group comprises establishments primarily engaged in mining or quarrying non-metallic minerals, except coal. Primary preparation plants, such as those engaged in crushing, grinding and washing, are included.

#### *Oil Sands Mining*

*NAICS 211114 (Non-conventional oil extraction)*: This industry group comprises establishments primarily engaged in producing crude oil from surface shales or oil sands or from reservoirs in which the hydrocarbons are semisolids and conventional production methods are not possible.[31]

#### *Mining Support Services*

*NAICS 21311B (Support activities for mining)*: This industry group comprises establishments primarily engaged in providing support services, on a contract or fee basis, required for the mining and quarrying of minerals. Establishments engaged in the exploration for minerals are included. Exploration includes traditional prospecting methods, such as taking ore samples and making geological observations at prospective sites. Note that this NAICS code combines NAICS codes 213117 (Contract drilling (except oil and gas)) and 213119 (Other support activities for mining).

#### *Primary Metal Manufacturing*

*NAICS 3311 (Iron and steel mills and ferro-alloy manufacturing)*: This industry group comprises establishments primarily engaged in smelting iron ore and steel scrap to produce pig iron in molten or solid form.

30) For more information on NAICS codes, see the Statistics Canada website: https://www23.statcan.gc.ca/imdb/p3VD.pl?Function=getVD&TVD=1181553

31) Currently, MiHR considers non-conventional oil extraction (NAICS 211114) to account for oil sands mining activities. This NAICS code likely includes other activities that are not relevant to mining (e.g., offshore drilling and shale oil production).

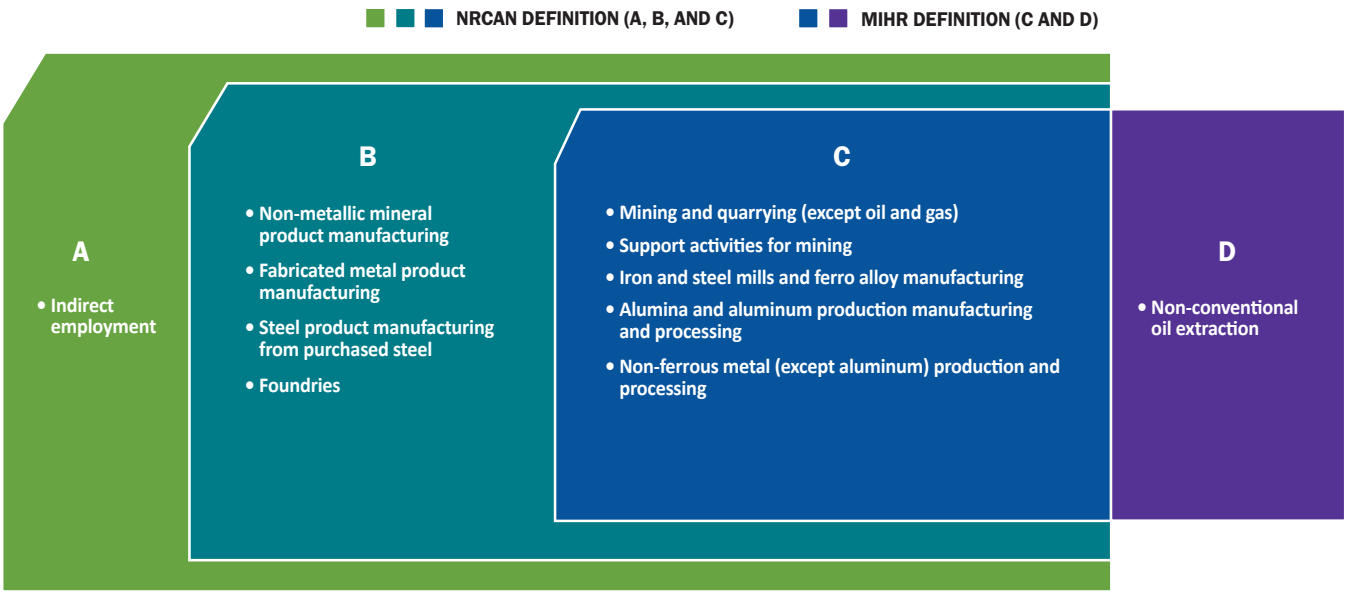
*NAICS 3313 (Alumina and aluminum production and processing)*: This industry group comprises establishments primarily engaged in extracting alumina.

*NAICS 3314 (Non-ferrous metal (except aluminum) production and processing)*: This industry group comprises establishments primarily engaged in smelting, refining, rolling, drawing, extruding and alloying non-ferrous metal (except aluminum).

### *How MiHR's Industry Definition is Different*

MiHR's definition of the mining industry does not perfectly align with definitions used by Natural Resources Canada (NRCan), the Mining Association of Canada (MAC) and other organizations that produce labour market and employment information related to mining. In contrast to NRCan, MiHR excludes certain aspects of downstream manufacturing and indirect employment from its definition (Figure A - 1). Consequently, MiHR's employment estimates tend to be lower compared to NRCan's estimate.

## Figure A - 1 Comparison of MiHR and NRCan Definitions of the Mining Industry




*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026.*

## National Occupational Classification (NOC) System

Occupational analysis in this report follows the NOC system to report on labour market activity. The NOC system is the nationally accepted taxonomy and organizational framework of occupations in the Canadian labour market.[32]

From the hundreds of occupations under the NOC system, MiHR has identified and tracked 100 "selected occupations" considered the most relevant to the mining industry (Table A - 1). These range from occupations in production and operations, such as *Heavy equipment operators*, to occupations in professional and physical sciences, such as *Geoscientists and oceanographers*.

32) For more information on NOC codes, see the Government of Canada website: https://noc.esdc.gc.ca/.

## Table A - 1 List of MiHR's Top 100 Mining-Centric Occupations and Categories

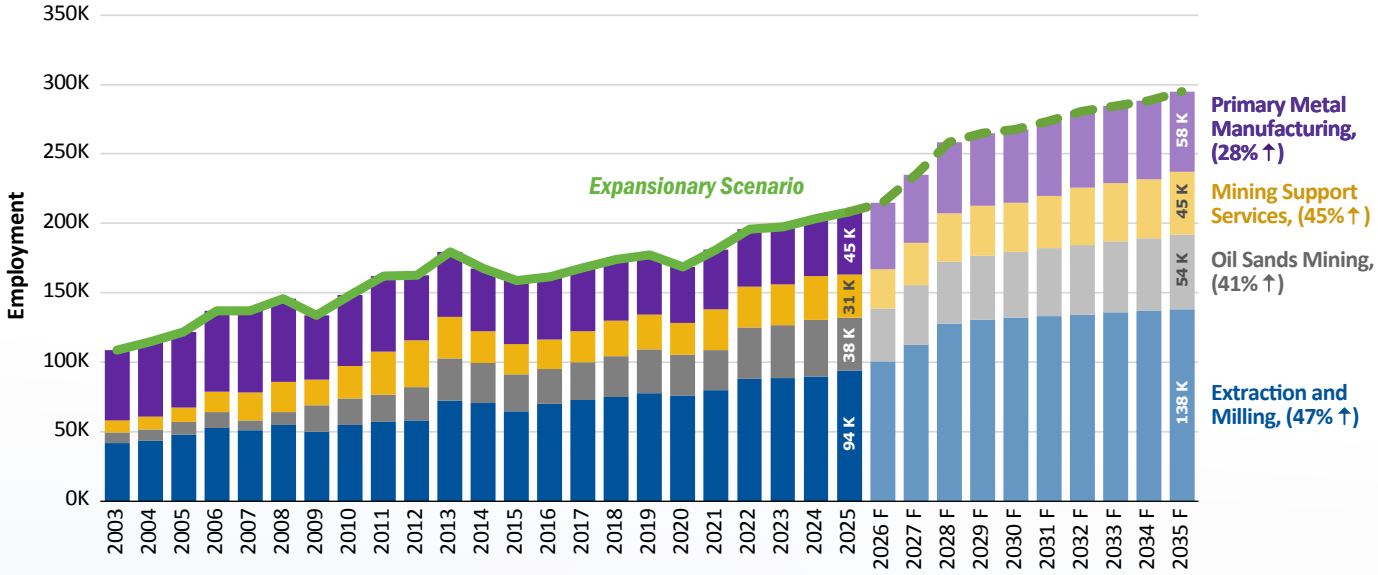
| Categories | NOC | Title |
|---|---|---|
| Human Resources and Financial | 10010 | Financial managers |
| | 10011 | Human resources managers |
| | 11100 | Financial auditors and accountants |
| | 11101 | Financial and investment analysts |
| | 11200 | Human resources professionals |
| | 12101 | Human resources and recruitment officers |
| | 12200 | Accounting technicians and bookkeepers |
| | 14200 | Accounting and related clerks |
| Production | 72500 | Crane operators |
| | 73300 | Transport truck drivers |
| | 73400 | Heavy equipment operators |
| | 73402 | Drillers and blasters - surface mining, quarrying and construction |
| | 75101 | Material handlers |
| | 83100 | Underground production and development miners |
| | 84100 | Underground mine service and support workers |
| | 85110 | Mine labourers |
| | 93100 | Central control and process operators, mineral and metal processing |
| | 94100 | Machine operators, mineral and metal processing |
| | 95100 | Labourers in mineral and metal processing |
| | 13201 | Production and transportation logistics coordinators |
| | 75110 | Construction trades helpers and labourers |
| | 75119 | Other trades helpers and labourers |
| | 92100 | Power engineers and power systems operators |
| | 94101 | Foundry workers |
| | 94105 | Metalworking and forging machine operators |
| | 94106 | Machining tool operators |
| | 94107 | Machine operators of other metal products |
| | 95101 | Labourers in metal fabrication |
| | 95109 | Other labourers in processing, manufacturing and utilities |
| Professional and Physical Science | 21102 | Geoscientists and oceanographers |
| | 21322 | Metallurgical and materials engineers |
| | 21330 | Mining engineers |
| | 21331 | Geological engineers |
| Supervisors, Coordinators, and Superintendents | 22233 | Construction inspectors |
| | 70010 | Construction managers |
| | 70012 | Facility operation and maintenance managers |
| | 72010 | Contractors and supervisors, machining, metal forming, shaping and erecting trades and related occupations |
| | 72011 | Contractors and supervisors, electrical trades and telecommunications occupations |
| | 72012 | Contractors and supervisors, pipefitting trades |
| | 72020 | Contractors and supervisors, mechanic trades |
| | 72021 | Contractors and supervisors, heavy equipment operator crews |
| | 90010 | Manufacturing managers |
| | 92011 | Supervisors, petroleum, gas and chemical processing and utilities |
| | 92023 | Supervisors, other mechanical and metal products manufacturing |
| Support workers | 12102 | Procurement and purchasing agents and officers |
| | 13100 | Administrative officers |
| | 13110 | Administrative assistants |
| | 14100 | General office support workers |
| | 14400 | Shippers and receivers |
| | 14401 | Storekeepers and partspersons |
| | 14402 | Production logistics workers |
| | 14403 | Purchasing and inventory control workers |
| | 21120 | Public and environmental health and safety professionals |
| | 22230 | Non-destructive testers and inspectors |
| | 22231 | Engineering inspectors and regulatory officers |
| | 22232 | Occupational health and safety specialists |
| | 41210 | College and other vocational instructors |
| | 94104 | Inspectors and testers, mineral and metal processing |
| Technical | 22101 | Geological and mineral technologists and technicians |
| | 22312 | Industrial instrument technicians and mechanics |
| | 21203 | Land surveyors |
| | 21222 | Information systems specialists |
| | 22100 | Chemical technologists and technicians |
| | 22212 | Drafting technologists and technicians |
| | 22213 | Land survey technologists and technicians |
| | 22214 | Technical occupations in geomatics and meteorology |

| Categories | NOC | Title | Categories | NOC | Title |
|---|---|---|---|---|---|
| Professional and Physical Science | 21101 | Chemists | Technical | 22300 | Civil engineering technologists and technicians |
| | 21202 | Urban and land use planners | | 22301 | Mechanical engineering technologists and technicians |
| | 21231 | Software engineers and designers | | 22302 | Industrial engineering and manufacturing technologists and technicians |
| | 21300 | Civil engineers | | 22310 | Electrical and electronics engineering technologists and technicians |
| | 21301 | Mechanical engineers | Trades | 72100 | Machinists and machining and tooling inspectors |
| | 21310 | Electrical and electronics engineers | | 72106 | Welders and related machine operators |
| | 21320 | Chemical engineers | | 72201 | Industrial electricians |
| | 21321 | Industrial and manufacturing engineers | | 72400 | Construction millwrights and industrial mechanics |
| | 21399 | Other professional engineers | | 72401 | Heavy-duty equipment mechanics |
| | 41400 | Natural and applied science policy researchers, consultants and program officers | | 72104 | Structural metal and platework fabricators and fitters |
| Supervisors, Coordinators, and Superintendents | 80010 | Managers in natural resources production and fishing | | 72105 | Ironworkers |
| | 82020 | Supervisors, mining and quarrying | | 72200 | Electricians (except industrial and power system) |
| | 92010 | Supervisors, mineral and metal processing | | 72301 | Steamfitters, pipefitters and sprinkler system installers |
| | 00018 | Seniors managers - public and private sector | | 72410 | Automotive service technicians, truck and bus mechanics and mechanical repairers |
| | 10012 | Purchasing managers | | 73201 | General building maintenance workers and building superintendents |
| | 12013 | Supervisors, supply chain, tracking and scheduling coordination occupations | | 74203 | Automotive and heavy truck and equipment parts installers and servicers |
| | 20010 | Engineering managers | | 74204 | Utility maintenance workers |

*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026.*

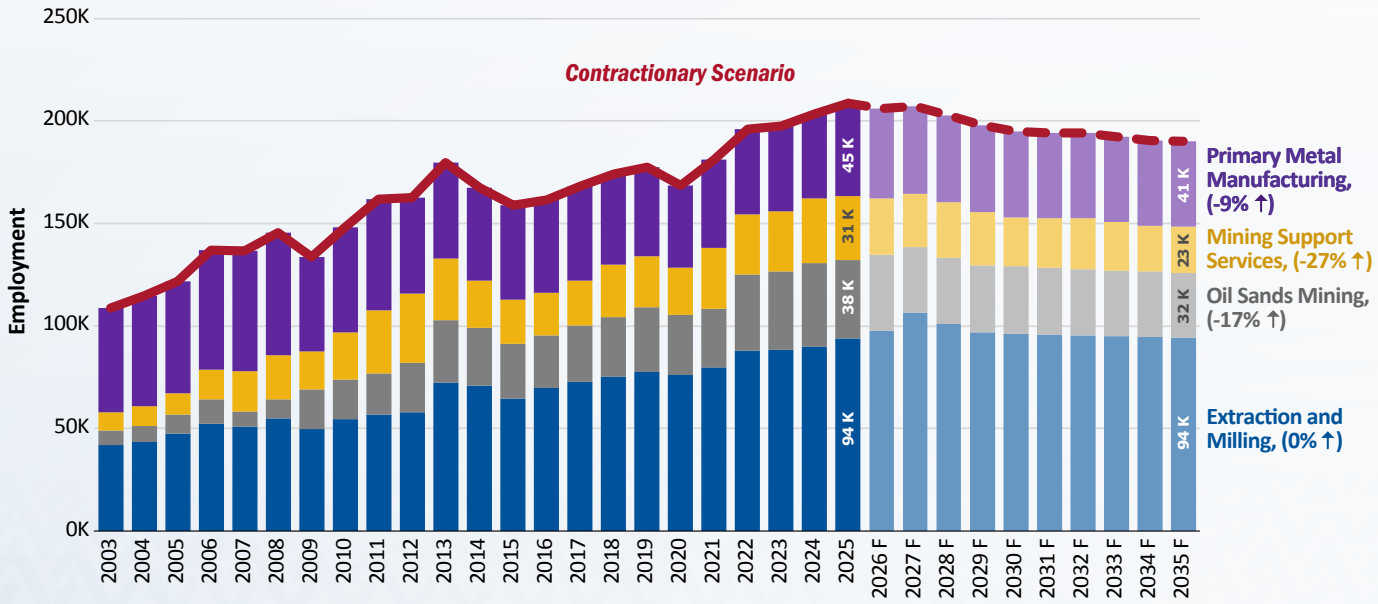
# Appendix B

## Employment Forecast by Mining Sub-sector, Expansionary Scenario




*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026.*

## Employment Forecast by Mining Sub-sector, Contractionary Scenario




*Source: Mining Industry Human Resources Council, Canadian Mining Outlook, 2026.*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