

North West region resource industry workforce, 2025

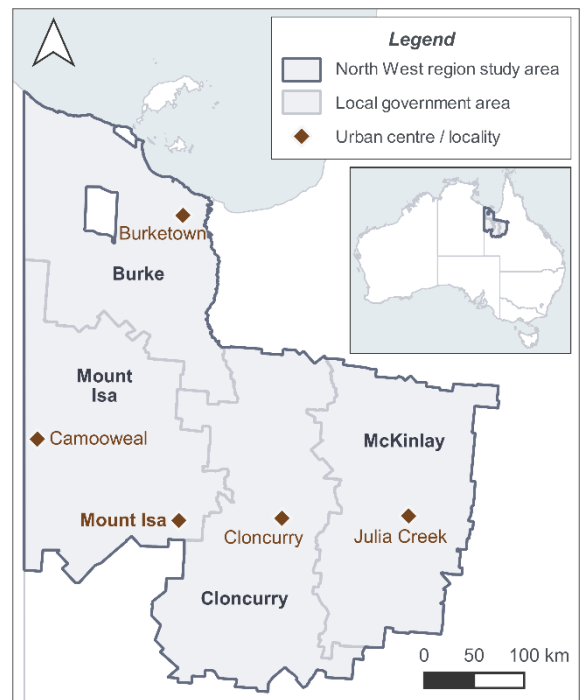
Introduction

The North West region of Queensland (Figure 1) is one of the world's richest mineral-producing regions, with large resources of metalliferous minerals including copper, gold, lead, silver, vanadium and zinc. Resource operations in the region include metalliferous and phosphate mining and processing, as well as related infrastructure. Much of the output from mining and processing in the region is transported to the Port of Townsville for export.

The North West region's resource industry workforce includes local residents who live in the same local government area (LGA) as their place of work, and others who live elsewhere and fly in/fly out or drive in/drive out (FIFO/DIDO) to work.

This report provides information on the characteristics and place of residence of the North West region's resource industry workforce. Data were derived from the Resource Employment Survey, conducted by Queensland Government Statistician's Office (QGSO), and other sources. The survey collected information for all existing resource operations and selected projects proposed for the region as at June 2025 (Figure 2).

Figure 1 North West region



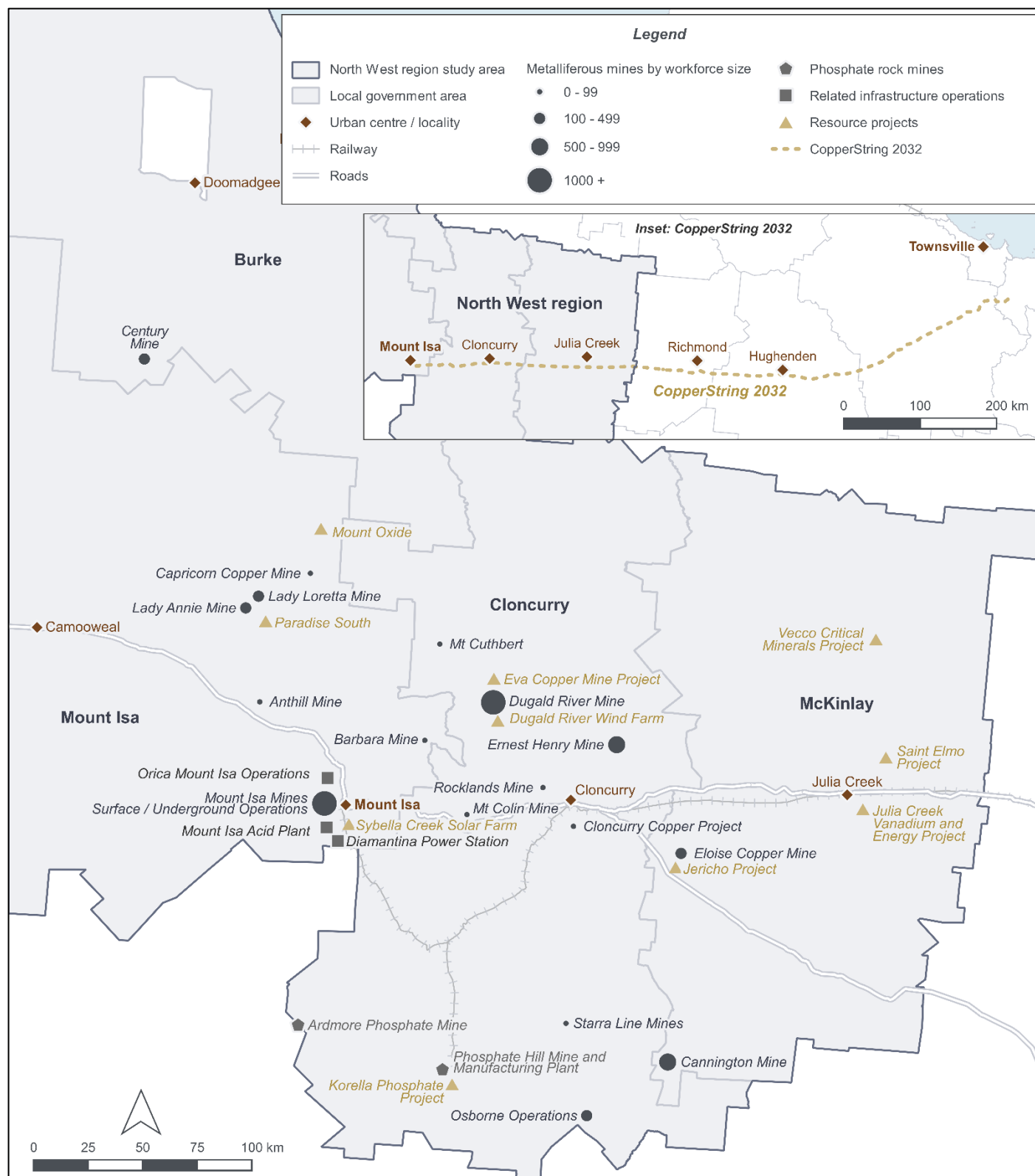
Source: QGSO

In this publication, the North West region comprises the LGAs of Burke, Cloncurry, McKinlay and Mount Isa (Figure 1).

Key findings

Key findings of this report include:

- In June 2025, the North West region had a resource industry workforce of around 8,305 persons.
- Most of the region's resource industry workers in June 2025 were engaged in metalliferous mining operations and processing (7,380 persons or 89%), with the balance in other resource industries (925 persons or 11%).
- By employment status, around 7 in 10 of the North West region's resource industry workers in June 2025 were employees (5,665 persons or 68%). Around 3 in 10 were contractors (2,640 persons or 32%).
- The LGA of Mount Isa (including Burke) had the largest number of workers, accounting for just over half of the region's total resource industry workforce in June 2025 (4,365 persons or 53%). The remainder worked in Cloncurry (2,530 persons or 30%), and McKinlay (1,410 persons or 17%).
- The North West region's resource industry workforce comprises local residents, who live in the same LGA as their place of work, and non-resident workers, who live outside the LGA where they work.
 - Place of residence was unknown for 13% (1,075 persons) of the region's workforce. Almost all these workers were contractors (1,050 persons).
- Of the 7,230 resource industry workers in the North West region in June 2025 whose place of residence was known:
 - 2,880 persons (or 40%) lived and worked in the same LGA
 - 2,165 persons (or 30%) came from North Queensland, including 1,600 persons (or 22%) from Townsville and 560 persons (or 8%) from Cairns
 - 1,560 persons (or 22%) came from South East Queensland.

Figure 2 Existing resource operations and selected projects^(a), North West region, June 2025

(a) Mining and mining processing operations by workforce size are based on numbers at June 2025 published by Resources Safety and Health Queensland (RSHQ), rather than confidential QGSO data. Operation and project locations shown in map are indicative only. Map includes operations that were in care and maintenance or had ceased production as at June 2025. See Table 8 (page 10) for a full list of existing operations and selected projects by LGA.

Sources: RSHQ, 2025; QGSO, 2025

Workforce characteristics

In June 2025, the North West region had a resource industry workforce of around 8,305 persons (Table 1). Mount Isa (incl. Burke) accounted for just over half of the region's total resource industry workforce (4,365 persons or 53%). The remainder worked in Cloncurry (2,530 persons or 30%) and McKinlay (1,410 persons or 17%).

At the time of QGSO's survey in June 2025, almost all the region's resource workers were engaged in metalliferous mining operations and processing (7,380 persons or 89%). The balance worked in other resource industries (925 persons or 11%) including phosphate rock mining and related infrastructure operations.

At the LGA level, Cloncurry had the largest proportion of resource industry workers in other resource industries (20%). In Mount Isa (incl. Burke), 10% of resource industry workers were in other resource industries, while in McKinlay, all workers were engaged in metalliferous mining.

At the time of QGSO's survey in June 2025, almost all resource industry workers in the region were engaged at existing operations. The remainder were engaged in project construction, care and maintenance activities, and the initial stages of mining projects.

Table 1 Resource industry workforce by sector of employment, North West region LGAs, June 2025

Place of work	Metalliferous mining	Other resource industry ^(a)	Total	Metalliferous mining	Other resource industry ^(a)	Total
	— persons —			— % —		
Cloncurry	2,025	505	2,530	80	20	100
McKinlay	1,410	0	1,410	100	0	100
Mount Isa (incl. Burke) ^(b)	3,945	420	4,365	90	10	100
North West region total	7,380	925	8,305	89	11	100

(a) 'Other resource industry' includes phosphate rock mining and related infrastructure operations. Refer to Notes at end of report for additional information.

(b) In order to preserve confidentiality, data for Burke LGA are aggregated with data for Mount Isa LGA.

Figures in tables in this report have been rounded to the nearest five; see Notes at end of report for details.

Source: QGSO estimates

According to their employment status, almost 7 in 10 of the North West region's resource industry workers in June 2025 were employees (5,665 persons or 68%) (Table 2). Around 3 in 10 were contractors (2,640 persons or 32%).

At the LGA level, Mount Isa (incl. Burke) had the largest employee workforce, both in magnitude (3,220 persons) and proportionally (74% of the LGA's total) (Figure 3). The remainder of the workforce in Mount Isa (incl. Burke) were contractors (1,145 persons or 26%). In Cloncurry, there were 1,610 employees comprising 64% of the LGA's resource industry workforce, while McKinlay had 835 employees accounting for 59%.

Employees are workers engaged directly by resource companies at resource operations or projects to carry out production, maintenance, and operational activities.

Contractors are workers engaged by companies providing services at resource operations or projects under contractual arrangements. Contracted services range from specific project construction and maintenance events to full provision of mining operations services, and contract workforces may be temporary or ongoing.

Mount Isa (incl. Burke) LGA had the largest resource industry workforce in the region (4,365 workers or 53% of the regional total). As Figure 3 shows, employees in Mount Isa (incl. Burke) also comprised the single largest group of resource industry employees in the region. Many employees in Mount Isa LGA live in the urban centre

of Mount Isa, which is the largest population centre in the North West region and the location of large-scale mining, mineral processing and industrial operations.

The North West region's resource industry workforce includes both local residents and non-resident workers. Non-resident or FIFO/DIDO workers stay in the local area while rostered on for work, then return to their place of residence elsewhere when rostered off. While in the region, non-resident workers typically stay in worker accommodation villages, commercial accommodation—such as hotels, motels and caravan parks—or in rented housing.

Mining companies operating in more remote parts of the region usually house their workers in on-site worker accommodation villages while they are rostered on. Some companies fly their personnel directly to remote mine sites from source regions such as Townsville, Cairns and South East Queensland.

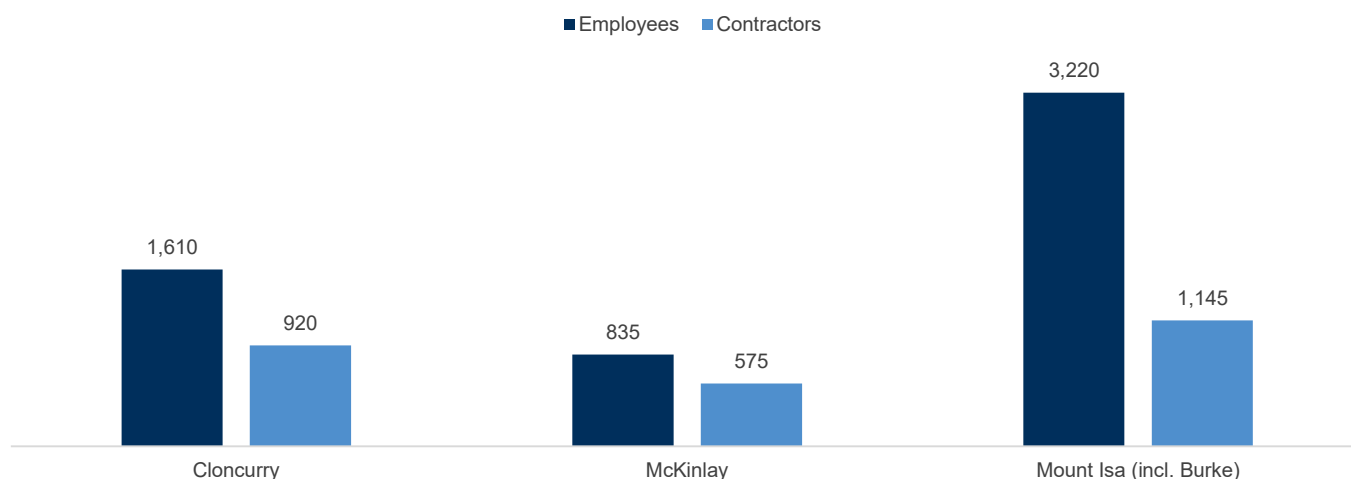
Table 2 Resource industry workforce by employment status^(a), North West region LGAs, June 2025

	persons	%
Employees	5,665	68
Contractors	2,640	32
Total workforce	8,305	100

(a) Refer to Notes at end of report for explanation of 'employment status'.

Source: QGSO estimates

Figure 3 Resource industry workforce by employment status^(a), North West region LGAs, June 2025



(a) Refer to Notes at end of report for explanation of 'employment status'.

Source: QGSO estimates

According to their residential status in June 2025, around 2,880 persons (or 35% of the region's resource industry workforce) were residents who lived and worked in the same North West region LGA (Table 3). A further 4,350 persons (or 52%) were non-residents who lived outside of the LGA where they worked.

Place of residence was reported as unknown for the remaining 1,075 persons (or 13%). While most resource industry companies were able to report the place of residence of their employees, they were less likely to know their contractors' place of residence.

Figure 4 illustrates these differences in reporting of residential status for employees and contractors in the North West region in June 2025. For employees, around 2,470 persons (or 44%) were reported to be residents, while 3,170 persons (or 56%) were non-residents. Less than 1% of employees, or 25 persons, were recorded by

Table 3 Resource industry workforce by residential status^(a), North West region, June 2025

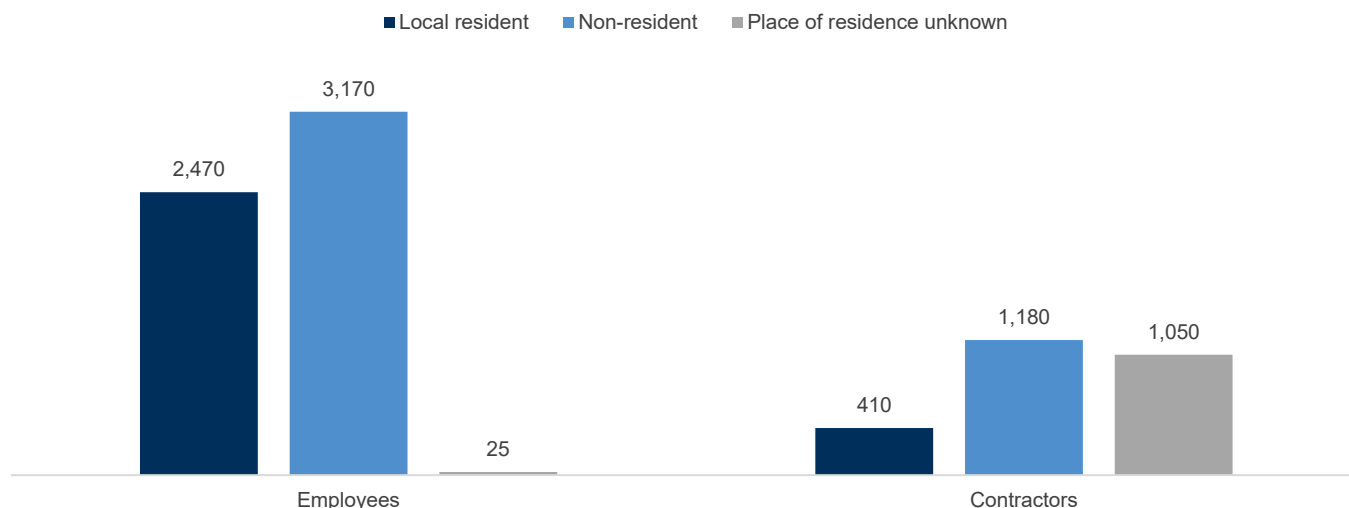
	persons	%
Local resident	2,880	35
Non-resident	4,350	52
Place of residence unknown	1,075	13
Total workforce	8,305	100

(a) Refer to Notes at end of report for explanation of 'residential status'.

Source: QGSO estimates

respondents as having an unknown place of residence. In contrast, place of residence was unknown for 40% of contractors (or 1,050 persons). Given the under-reporting of place of residence of contractors, the residential status of this group cannot be determined with the same degree of certainty as for employees.

Figure 4 Resource industry workforce by employment status^(a) and residential status^(b), North West region, June 2025



(a) Refer to Notes at end of report for explanation of 'employment status'.

(b) Refer to Notes at end of report for explanation of 'residential status'.

Source: QGSO estimates

Place of residence

Detailed place of residence data in this section provides further information on where the North West region's resource industry workers live when not at work.

As noted above, the North West region's resource industry workforce includes a sizeable number of non-resident workers (Table 3) who live outside the LGA where they work (Figure 5).

Due to the remoteness of the region, many non-resident workers fly in/fly out from major population centres elsewhere in the state or from interstate or overseas.

Place of residence was unknown for 1,075 persons or 13% of resource industry workers in the North West region in June 2025, most of whom were contractors.

Of the 7,230 persons where place of residence was known, around 2,880 persons lived and worked in the same North West region LGA (Table 4, Figure 6). This equates to 40% of those with a known place of residence.

Table 4 Resource industry workforce by place of residence, North West region, June 2025

Place of residence ^(a)	Place of work – North West region
	— persons —
Local LGA	2,880
Other North West region LGA	110
North West region	2,985
Cairns region	560
Townsville region	1,600
North Queensland	2,165
South East Queensland region	1,560
Other Queensland regions	360
Interstate or overseas	160
Total with place of residence known	7,230
<i>Unknown</i>	1,075
Total workforce	8,305

(a) Refer to footnotes below Figure 6 for explanation of 'place of residence'.

Source: QGSO estimates

Just 1% of those with a known place of residence (110 persons) came from other North West region LGAs. This reflects the remote location of many resource operations in the region, combined with the small resident populations of most towns.

Most non-resident workers in the North West region with a known place of residence outside the region came from coastal areas in North Queensland (2,165 persons or 30%). This included 1,600 persons (or 22%) from Townsville and 560 persons (or 8%) from Cairns.

After the North West region and North Queensland, South East Queensland was the next largest source region for resource industry workers in the North West region in June 2025 (1,560 persons or 22%).

Smaller numbers of workers came from other Queensland regions (360 persons or 5%) and interstate or overseas (160 persons or 2%).

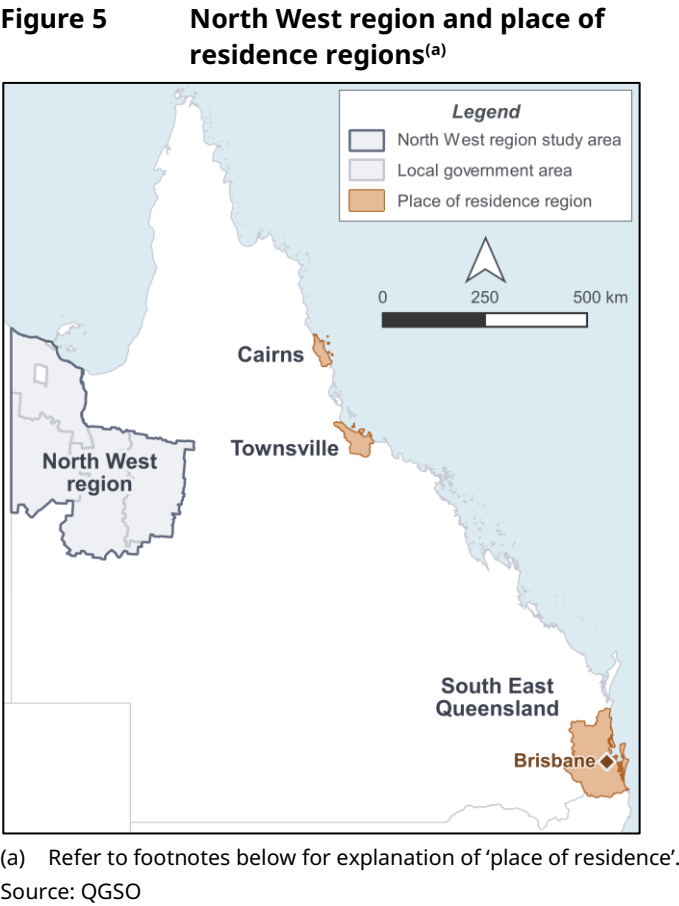
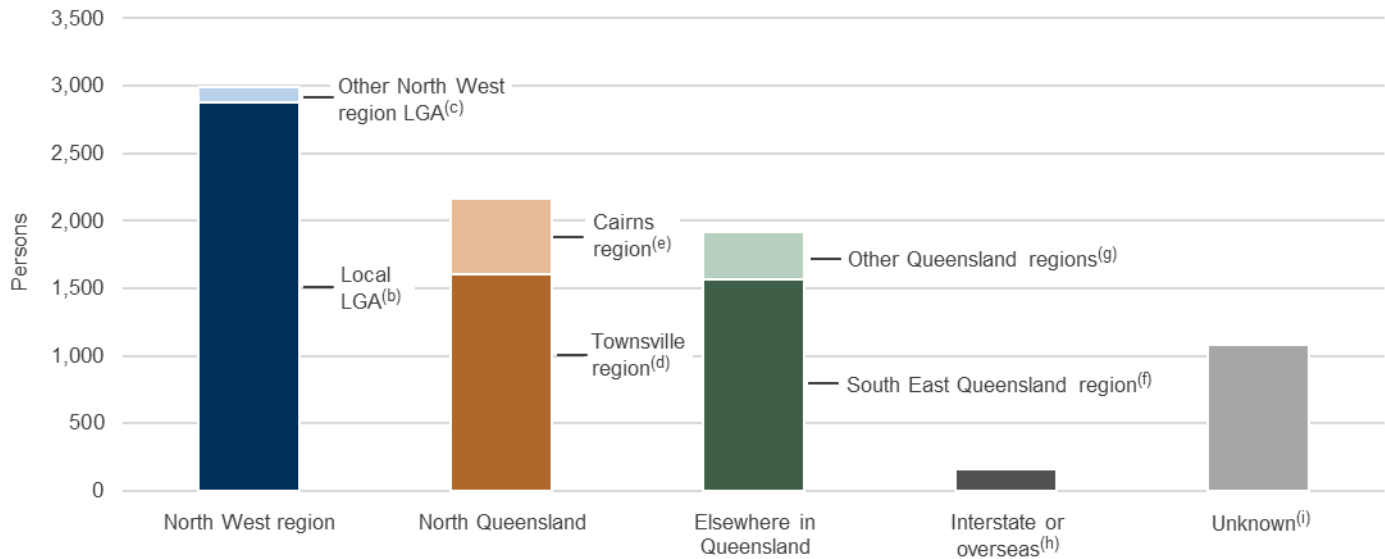


Figure 6 Resource industry workforce by place of residence^(a), North West region, June 2025



(a) Refer to Notes at end of report for further information on place of residence.

(b) 'Local LGA' refers to the North West region LGA in which the resource operation or project is located.

(c) 'Other North West region LGA' refers to the three North West region LGAs other than the LGA in which the resource operation or project is located. The four LGAs in the North West region are Burke, Cloncurry, McKinlay and Mount Isa.

(d) Townsville region includes the urban centre of Townsville and hinterland areas.

(e) Cairns region includes the urban centre of Cairns and hinterland areas.

(f) South East Queensland region includes the major population centres of Brisbane, Gold Coast and Sunshine Coast.

(g) 'Other Queensland regions' refers to all other locations not specifically identified in Queensland.

(h) 'Interstate or overseas' refers to all other locations outside of Queensland.

(i) 'Unknown' refers to workers whose place of residence was reported as unknown in QGSO's 2025 Resource Employment Survey.

Source: QGSO estimates

Cloncurry

Cloncurry was home to three metalliferous mining and processing operations and one phosphate rock mining and processing operation in June 2025, as well as a number of operations in care and maintenance (Figure 2, Table 8). Four resource projects were also included in the survey.

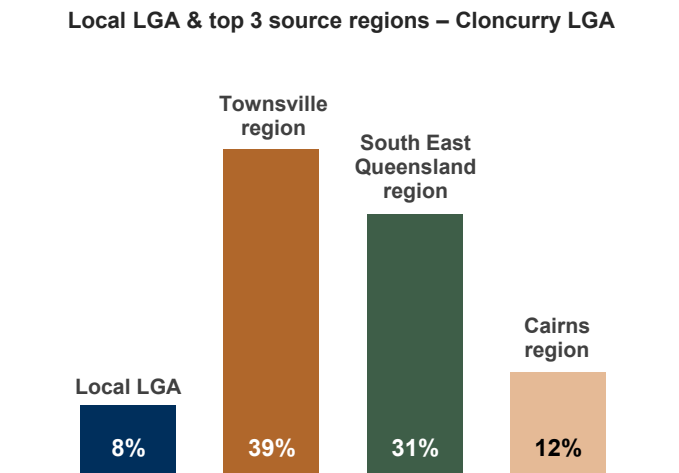
Cloncurry LGA had a resource industry workforce of 2,530 persons in June 2025 (Table 5). Place of residence was known for 2,150 of the LGA's resource industry workers, equivalent to 85% of the total.

Of those with a known place of residence, 175 persons or 8% lived locally in towns such as Cloncurry or in rural areas of the LGA. A further 90 persons (or 4%) came from other North West region LGAs.

The top source region for non-resident workers in Cloncurry LGA in June 2025 was the Townsville region (840 persons or 39% of those with a known place of residence) (Figure 7). Townsville is situated almost 800km to the east and is the place of origin of commercial flights to the town of Cloncurry and charter flights to airstrips at remote mines in the LGA.

South East Queensland was the second-largest source region for non-resident workers in Cloncurry in June 2025 (670 persons or 31%). Workers from major population centres in South East Queensland travel to the region by air.

Figure 7 Resource industry workforce by place of residence^(a), Cloncurry, June 2025



(a) Percentages in graph are based on those with a known place of residence.
Source: QGSO estimates

Cloncurry at a glance

- Cloncurry accounted for 30% of the North West region's resource industry workforce in June 2025.
- Around 8 in 10 workers (80%) in the resource industry were in metalliferous mining.
- 64% of the workforce were employees, while the remaining 36% were contractors.
- Place of residence was known for 85% of the workforce. Place of residence was unknown for 15% of the workforce.
- Of those with a known place of residence:
 - 8% lived in the local LGA
 - 55% lived in other North West region LGAs or elsewhere in North Queensland
 - 37% lived elsewhere in Queensland, or interstate or overseas.

Table 5 Resource industry workforce by place of residence, Cloncurry, June 2025

Place of residence ^(a)	Place of work – Cloncurry
	— persons —
Local LGA	175
Other North West region LGA	90
North West region	265
Cairns region	260
Townsville region	840
North Queensland	1,100
South East Queensland region	670
Other Queensland regions	80
Interstate or overseas	35
Total with place of residence known	2,150
Unknown	380
Total workforce	2,530

(a) Refer to footnotes below Figure 6 for explanation of 'place of residence'.
Source: QGSO estimates

McKinlay

There were two metalliferous mining operations and two projects under construction in McKinlay in June 2025 (Figure 2, Table 8). Three resource projects were also included in the survey.

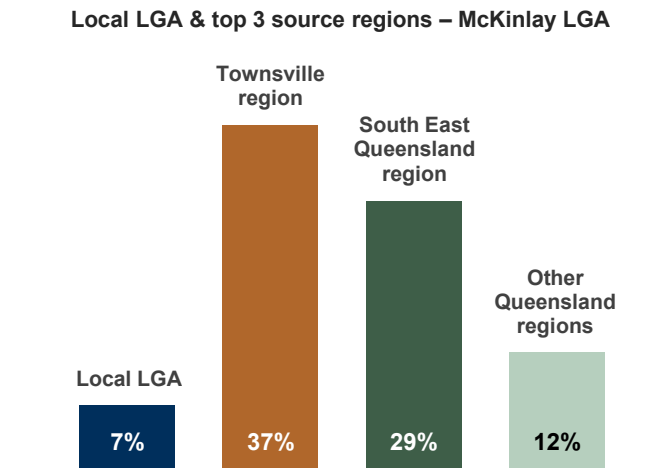
McKinlay LGA had a resource industry workforce of 1,410 persons in June 2025, representing 17% of the regional total (Table 6).

Place of residence was known for 935 persons or 66% of McKinlay's total resource industry workforce in June 2025. Of these, 60 persons or 7% lived locally.

The town of Julia Creek is the administrative centre of the LGA and is situated about 650km west of Townsville and 260km east of the regional hub of Mount Isa. Due to the long distances between these centres and mining operations in the LGA, almost all resource industry workers with a known place of residence fly in/fly out for work.

The top source region for non-resident workers in McKinlay in June 2025 was the Townsville region (340 persons or 37% of those with a known place of residence) (Figure 8). South East Queensland was the second largest source region for resource workers in McKinlay (265 persons or 29% of those with a known place of residence).

Figure 8 Resource industry workforce by place of residence^(a), McKinlay, June 2025



(a) Percentages in graph are based on those with a known place of residence.

Source: QGSO estimates

McKinlay at a glance

- McKinlay accounted for 17% of the North West region's resource industry workforce in June 2025.
- All workers in the resource industry were in metalliferous mining.
- 59% of the workforce were employees, while the remaining 41% were contractors.
- Place of residence was known for 66% of the workforce. Place of residence was unknown for 34% of the workforce.
- Of those with a known place of residence:
 - 7% lived in the local LGA
 - 49% lived in other North West region LGAs or elsewhere in North Queensland
 - 44% lived elsewhere in Queensland, or interstate or overseas.

Table 6 Resource industry workforce by place of residence, McKinlay, June 2025

Place of residence ^(a)	Place of work – McKinlay
	— persons —
Local LGA	60
Other North West region LGA	10
North West region	70
Cairns region	105
Townsville region	340
North Queensland	445
South East Queensland region	265
Other Queensland regions	115
Interstate or overseas	35
Total with place of residence known	935
Unknown	480
Total workforce	1,410

(a) Refer to footnotes below Figure 6 for explanation of 'place of residence'.

Source: QGSO estimates

Mount Isa (incl. Burke)

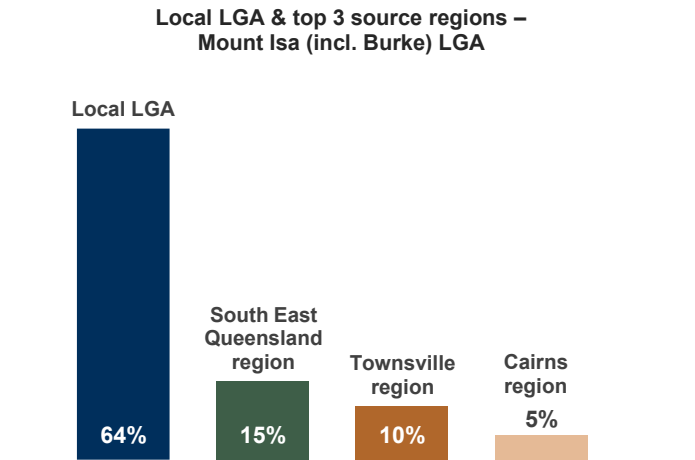
There were four metalliferous mining and processing operations and three related infrastructure operations in Mount Isa LGA in June 2025 (Figure 2, Table 8). Another mining operation, located in Burke LGA, is included with data for Mount Isa LGA for confidentiality reasons. Four resource projects in Mount Isa LGA were also included in the survey.

In Mount Isa (incl. Burke) LGA, 4,365 persons worked in the resource industry in June 2025 (Table 7). Place of residence was known for 4,145 workers, representing 95% of the total resource industry workforce in Mount Isa (incl. Burke) LGA.

Of those workers with a known place of residence, almost two-thirds lived locally (2,640 persons or 64%). Most were based in the urban centre of Mount Isa and worked at nearby resource operations. As Figure 2 shows, the largest of these is Mount Isa Mines Surface/Underground Operations, which included copper and zinc mines and metal processing operations in June 2025. Other local operations include Diamantina Power Station, Mount Isa Acid Plant and Orica Mount Isa Operations.

The top source region for non-resident workers in the LGA of Mount Isa (incl. Burke) in June 2025 was South East Queensland (625 persons or 15% of those with a known place of residence) (Figure 9). Workers from major population centres in South East Queensland travel to the region by air. Townsville and Cairns were the second and third-largest source regions of resource industry workers in Mount Isa (incl. Burke) LGA, accounting for 420 persons (or 10%) and 195 persons (or 5%), respectively.

Figure 9 Resource industry workforce by place of residence^(a), Mount Isa (incl. Burke), June 2025



(a) Percentages in graph are based on those with a known place of residence.
Source: QGSO estimates

Mount Isa (incl. Burke) at a glance

- Mount Isa (incl. Burke) accounted for 53% of the North West region's resource industry workforce in June 2025.
- 90% in the resource industry were in metalliferous mining.
- 74% of the workforce were employees, while 26% were contractors.
- Place of residence was known for 95% of the workforce. Place of residence was unknown for 5% of the workforce.
- Of those with a known place of residence:
 - 64% lived in the local LGA
 - 15% lived elsewhere in North Queensland
 - 21% lived elsewhere in Queensland, or interstate or overseas.

Table 7 Resource industry workforce by place of residence, Mount Isa (incl. Burke), June 2025

Place of residence ^(a)	Place of work – Mount Isa (incl. Burke)
	— persons —
Local LGA	2,640
Other North West region LGA	10
North West region	2,650
Cairns region	195
Townsville region	420
North Queensland	615
South East Queensland region	625
Other Queensland regions	160
Interstate or overseas	90
Total with place of residence known	4,145
Unknown	220
Total workforce	4,365

(a) Refer to footnotes below Figure 6 for explanation of 'place of residence'.
Source: QGSO estimates

Table 8 Existing resource operations and selected projects^(a), North West region LGAs, June 2025

Category	Operation / project name	Company name
Cloncurry		
RI	CopperString 2032	Powerlink
MM	Dugald River Mine	MMG
RE	Dugald River Wind Farm	MMG
MM	Ernest Henry Mine	Evolution Mining
MM	Eva Copper Mine Project	Harmony Eva Copper
PR	Korella Phosphate Project	Chatham Rock Phosphate
PR	Phosphate Hill Mine and Manufacturing Plant	Dyno Nobel
MM	Starra Line–Osborne Operations	Chinova Resources
McKinlay		
MM	Cannington Mine	South32
RI	CopperString 2032	Powerlink
MM	Eloise Copper Mine	AIC Mines
MM	Jericho Project	AIC Mines
MM	Julia Creek Vanadium and Energy Project	QEM
MM	Saint Elmo Project	Multicom Resources
MM	Vecco Critical Minerals Project	Vecco Group
Mount Isa (incl. Burke)		
MM	Capricorn Copper Mine ^(b)	29Metals
MM	Century Mine	Sibayne-Stillwater
RI	CopperString 2032	Powerlink
RI	Diamantina Power Station	APA
MM	Lady Annie–Anthill Operations	Austral Resources
MM	Lady Loretta Mine	Glencore Queensland Metals
RI	Mount Isa Acid Plant	Dyno Nobel
MM	Mount Isa Mines Surface/Underground Operations ^(c)	Glencore Queensland Metals
MM	Mount Oxide	True North Copper
RI	Orica Mount Isa Operations	Orica
PR	Paradise South	North West Phosphate
RE	Sybella Creek Solar Farm	APA

MM = metalliferous mine PR = phosphate rock RE = renewable energy RI = related infrastructure

(a) Existing operations include metalliferous mines, phosphate rock mines and resource industry-related infrastructure as at June 2025. Selected projects are those included in QGSO's 2025 Resource Employment Survey. Operations that have ceased production or were in care and maintenance, including Barbara Mine in Mount Isa, and Ardmore Phosphate Mine, Cloncurry Copper Project, Mt Colin Mine, Mt Cuthbert and Rocklands Mine in Cloncurry, are not included in this list.

(b) Operations at Capricorn Copper Mine remained suspended as at June 2025 (29Metals, 2025).

(c) Mount Isa Mines Surface/Underground Operations comprised copper and zinc operations, mineral processing and smelting operations, power generation, and support and administrative services (Glencore, 2026b). Mount Isa copper operations ceased mining in July 2025 (Glencore, 2026a).

Source: QGSO, 2025

Notes

Geographies

In this publication, the North West region comprises the LGAs of Burke, Cloncurry, McKinlay, and Mount Isa. Resource industry operations in the region are distributed across these four LGAs. Place of residence regions cited in this report reflect places of residence as reported by survey respondents, which may not be based on defined statistical geographies.

Survey scope

Data in this report are derived from annual surveys conducted by QGSO in 2025 and other sources. The scope of the Resource Employment Survey covered all resource industry companies with existing operations and selected projects in the North West region as at June 2025. Selected projects are those included in QGSO's 2025 Resource Employment Survey. Selected projects cover projects at different stages of the development pipeline, ranging from projects under construction to those in the initial stages of development.

A full list of operations and projects is available in Table 8 of this report.

Data coverage

In the 2025 Resource Employment Survey, reported data included numbers and place-of-residence characteristics of employees and contractors at resource operations or engaged in outsourced maintenance or project construction. Workers at operations that had ceased production or were in care and maintenance in June 2025 are included in workforce estimates if worker numbers were supplied to QGSO in the Resource Employment Survey. Data also include numbers and characteristics of workers engaged in on-site activities during the initial stages of resource projects.

Workforce estimates

Workforce estimates are based on the total number of workers reported at the time of the survey. Worker numbers may vary in response to a range of factors, including changing production demands, seasonal influences, adverse weather events and industrial action.

In contrast, the non-resident population measure presented in QGSO's Bowen and Surat Basin population reports reflects the number of workers staying in the LGA of their workplace at a given point in time. Workers who are absent from work due to their shift arrangements are not included in the non-resident population even though they are part of the region's resource industry workforce.

Employment status

The workforce of the resource industry in Queensland comprises employees, contractors and associated sub-contractors who work together at resource operations and projects and are engaged by different employers, either the owner/manager of the resource operation or a specialist contracting company. Employees are workers engaged directly by resource companies to carry out on-site production, maintenance and operations. Contractors are workers engaged by companies providing services at resource operations or projects under contractual arrangements. Contracted services range from specific project construction and scheduled maintenance events to full provision of mining operations services, and contract workforces may be temporary or ongoing.

Residential status

In this report, 'local residents' are defined as workers who live in the same LGA as their place of work. 'Non-residents' are workers who live outside the LGA where they work. 'Place of residence known' refers to

workers whose place of residence was reported by survey respondents. 'Place of residence unknown' refers to workers whose place of residence was reported as unknown by survey respondents.

In QGSO's Resource Employment Survey, most respondents were able to report the place of residence of their employees. Fewer could report this information for their contractors, as resource industry companies who engage contractors may not have oversight of their place of residence. In the 2025 survey, place of residence was reported as unknown for less than 1% of employees and 40% of contractors. Users should consider the limitations of the data in interpreting these results.

Data confidentiality and rounding

Survey information reported by resource industry companies is confidential and not available for distribution. Data in this report have been aggregated to ensure that confidentiality of individual responses is preserved.

Data for Burke LGA are aggregated with data for Mount Isa LGA to preserve the confidentiality of the single resource operation in Burke LGA.

Figures in tables have been rounded to the nearest five. As a result of rounding, discrepancies may occur between sums of the component items and totals. Percentages and other calculations are made prior to rounding of figures and discrepancies might therefore exist between these calculations and those derived from the rounded figures.

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