



Brunel

2023

U.S. MINING
LABOR OUTLOOK

Thank you.

We would like to express our gratitude to all those organizations and individuals who participated in the collection of data for this year's survey.

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Brunel is a global workforce services provider, specializing in the delivery of skilled professionals to the oil, gas, energy and mining industries.

The Brunel network is comprised of more than 13,000 employees in over 100 offices across 44 countries. Our operational excellence and expanding global presence empowers projects with access to a network of talented professionals and unrivaled services.

Our mining team is part of an evolving industry with new potential. With resource scarcity and market uncertainty making projects increasingly complex, the pressure to work efficiently, safely and cost-effectively is higher than ever. To stay competitive, companies need a smart, experienced and dedicated workforce.

We offer services across every phase of the mining project lifecycle, from acquiring and mobilizing talent to providing technical services and project solutions. Brunel has the talent and workforce services your mining project needs to thrive.

With expertise across geological exploration, construction, commissioning, HSE and quality operations, our specialists operate as an extension of your business, so you can keep growing.

The Brunel Advantage: Unparalleled Mining Experience

Angela Ingram

Angela Ingram
Mining Business Manager, Brunel



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It is our pleasure to present the following summary on 2020 Salaries, Wages and Benefits for the U.S. Mining Industry.

We would also like to express our special thanks to those companies and organizations that have participated in this survey.

It is important to note that all survey responses and data has been kept confidential. CostMine and InfoMine USA, Inc. have retained all survey responses internally and the summary data as presented in the report, without company or mine names, is the only data released to our customers and our marketing partner, Brunel.

We would like to thank Brunel for their support and sponsorship of this report.

Please contact us if you have any questions or comments, or would like to purchase the full report. We value your input and continue to strive to deliver compensation information to the mining industry. If you would like to participate, let us know.

On behalf of the entire CostMine team, thank you.

Sincerely,

Jennifer Leinart

Jennifer B. Leinart
President, InfoMine USA, Inc.

CostMine, a division of InfoMine USA, Inc. has produced this report independently of any other entity. All data is retained in the InfoMine USA, Inc. office and is kept confidential. The summary data in the following pages was compiled by CostMine personnel. The company names and mines are not included and identified by code number only. Every effort was made to make the information about these mines as usable without revealing the mines' identities.



MINING OUTLOOK

2020 was a year of turmoil. While more optimistic than 2020, the state of 2021 remains uncertain. Lucky for the mining industry, there is positive growth forecasted over the next few years.

The US gold mining sector will see steady growth over the coming years. Non-ferrous and precious metal prices will pave the way for project development in copper and gold. With elevated gold prices and improving greenfield and brownfield projects, gold is paving the way for an optimistic mining future.

The outlook for coal however is gloomy. It is not expected to recover this year as US thermal coal consumption hits a multi-decade low. The pandemic's disruptions to the power sector accelerated structural weaknesses in the coal industry and ultimately led to idled operations. With the recent election we can expect to see a return to an environmental policy similar to the Obama administration. Overall, the US coal mine production will continue to decline over the coming years as competition from less-expensive power sources reduces domestic thermal coal demand.

Our data findings make for an insightful read, with each table telling a different story. From the pandemic and structural decline to the election and environmental policies, each state's salaries echo the future of the mining industry.

As with our previous salary guides, is it the year over year trends that provide the most insights. We hope you enjoy this 2021 summary of the U.S. Mine Salaries, Wages & Benefits 2021 Survey Results.

The full report is available for purchase at www.costmine.com.

INTRO

This year, 165 mines in 42 U.S. states, representing over 46,000 mine employees responded to the InfoMine USA, Inc. U.S. mining compensation survey. InfoMine surveys mines throughout the United States, Canada and other parts of the world annually for information about wages, salaries, benefits, and incentive bonus plans as part of an extensive data collection program to monitor cost areas of significance to the mining industry.

The full report contains the results of our latest survey of U.S. metal, industrial mineral, aggregate, and coal mine wages, salaries, benefit plans and employment taxes. Included are wages for hourly employees, salaries for technical, managerial, and administrative personnel, as well as executive compensation. This executive summary is intended to provide an overview of the survey results.

The survey was designed to provide current information for estimating labor costs for new projects, and to provide comparative information for establishing wages and benefit plans for new and existing operations. State and federal employment tax rates are also summarized.

The data is collected by sending questionnaires to personnel managers at active mining operations. The information included in the report was taken from the forms returned to us, from labor contracts provided by some of the mines, and from follow-up telephone calls. This year's data was collected between July 2020 and December 2020. All currency is in U.S. dollars.

The full report titled *U.S. Mining Salaries, Wages and Benefits, 2020 Survey Results* is available for purchase from InfoMine USA, Inc.

MINE WAGE & BENEFIT SURVEY

Listed in the full report are actual wage and benefit plan summaries for 41 metal mines, 65 industrial mineral/aggregate mines, and 44 coal mines. All of the mines are identified by code number only. The information is presented essentially as provided to us by the mining companies, with minimal analysis or manipulation on our part.

One hundred and twenty-one mines provided salary information, of which 36 were metal producers, 48 were industrial mineral and aggregate mines, and 37 were coal mines.

This report also includes executive compensation for over 200 Canadian and U.S. mining companies, traded on U.S. stock exchanges.

HIGHLIGHTS

Of the 165 mines responding, 66 industrial mineral, 33 metal mines, and 41 coal mines increased wages by an average of 3.0%, ranging from 1.0% to 33.0%, in the 12 months preceding the survey. Two of the industrial mineral mines, 13 of the metal mines, and 4 coal mines showed no change in wages. Six of the mines decreased wages in the last 12 months. Ninety-two mines offered their employees the opportunity to increase wages through incentive bonus plans.

In addition to standard benefit items, some companies offer employee assistance programs, safety equipment and tool allowances, uniform rental, transportation and/or room and board for remote mine sites, scholarships for dependent children, education and training assistance, adoption assistance, matching charitable gift programs, health club memberships, and a variety of other innovative benefits. One mine reported offering big game hunting privileges to employees and family as a benefit, while another offered pet insurance.

Many mines pay cash bonuses for good safety performance. The most common type is a fixed bonus for achieving an accident-free record for a specified period of time. Some mines penalize workers by reducing other bonuses when lost-time accidents occur. The penalties may be imposed on the individual at fault, on a department, or on the entire mine. Other mines pay bonuses based on improvement over historical averages, or they may tie the bonus to production as a fixed award per ton of ore produced if no lost-time accidents occur. Some mines pay an attendance bonus. Details of these bonus plans and other benefits are presented in the full report.

BENCHMARK HOURLY WAGES

Wages for selected job classifications are listed in table 1 for comparison purposes. Other statistical tables comparing wages for union and nonunion mines, eastern versus western mines and by commodity are presented in the full report. The job categories listed were selected because they are readily recognized and are common to many mines.

Responsibilities included under the same title can vary considerably, and similar jobs can have varying titles from mine to mine. The jobs were categorized on the basis of job title only.

Additional tables are presented in the full report.

TABLE 1

Benchmark Hourly Base Wages for Selected Job Titles: Surface and Underground Mines (U.S. \$ per hour)

Extracted from U.S. Mining Salaries, Wages & Benefits, 2020 Survey Results.

Job Title	Metal Mines	Coal Mines	Other Mines ¹
	Average	Average	Average
Surface Mines (30 metal mines, 29 coal mines, 59 industrial mineral mines)			
Electrician	33.02	33.58	31.10
Heavy Equipment Operator	31.06	33.23	27.43
Production Truck Driver	27.39	29.78	23.12
Laborer	23.74	27.03	21.31
Underground Mines (14 metal mines, 22 coal mines, 11 industrial mineral mines)			
Mechanic	32.88	30.46	30.97
Miner	29.47	30.86	25.39
UG Equipment Operator	30.35	29.29	26.88
Underground Laborer	22.09	26.84	22.52
Milling Operations (All mines)			
Mill Equipment Operator	31.13	30.10	29.00
Mill Laborer	23.87	27.58	21.49

¹Other Mines include industrial Mineral mines and Aggregate operations.

Other job titles benchmarked in the full report include Surface Mechanic, Surface Driller, Shovel/Dragline, Surface Blaster, Surface Welder, Underground Electrician, Hoistman, Underground Blaster, Underground Welder, Surface Labor (UG mine), and Control Room Operator.

U.S. METAL & INDUSTRIAL MINE SALARY SURVEY

Along with the wage and benefit information reported in the full report, our survey also gathered information about salaries for technical, managerial, and administrative personnel.

Of the 165 metal, industrial mineral, and coal mines responding to this year's wage survey, 118 mines and corporate offices provided salary information and 3 mines provided only salary information. Salaries by job title are listed for each of these mines in the full report.

None of the mines are named, but most are identified by type of mine (surface or underground), annual production, number of employees and geographic locale. Represented are 30 underground operations and 91 surface mines, ranging in size from less than 100,000 to over 5,000,000 tons ore or product mined annually.

A statistical summary of some of the salary survey results is presented in table 2. Other job titles in the full report include: chief engineer, chief geologist, mill superintendent, maintenance superintendent, mill foreman, chemist, metallurgist, purchasing agent, environmental coordinator, personnel manager, secretary and more.

Additional statistical tables comparing salaries at underground and surface mines, industrial mineral versus metal mines, and within regions (Eastern, Midwestern, Rocky Mountain and Western) are available in the full report.

TABLE 2

Summary of Annual Base Salaries for Selected Job Titles: All U.S. (U.S. \$ per hour)

Extracted from U.S. Mining Salaries, Wages & Benefits, 2020 Survey Results.

	Underground	Surface	Total
Number of Mines	30	91	121
Job Title:	Average	Average	Average
General Manager	193,800	199,000	197,500
Mine Manager	142,500	144,800	144,100
Mine Superintendent	114,300	123,100	120,800
Mine Foreman	99,900	97,100	98,100
Mine Engineer	86,100	91,000	89,400
Mine Geologist	86,300	86,900	88,700
Environmental Technician	66,500	66,700	66,700
Metallurgist	93,900	105,000	101,300
Accountant	91,000	99,100	96,300
Accounting Clerk	48,800	52,000	51,100

U.S. MINING EXECUTIVE COMPENSATION

Public companies must disclose information concerning the amount and type of compensation paid to the chief executive officer, chief financial officer, and the three other most highly compensated executives in the company. This information is collected from each company's annual proxy statement or annual report. The information collected represent up to the top five job titles. Often, one employee fulfills more than one roll. For example, the CEO is often the President of the company as well.

This year information from over 200 U.S. and Canadian metal and industrial mineral mining companies, traded on U.S. stock exchanges, was reported. This information is reported by company size. Additional tables are available in the full report.

All compensation is reported in U.S. dollars. All salaries reported in the table are rounded to the nearest \$100.



TABLE 3

2019 Annual Executive Compensation for Selected Job Titles at 15 U.S. Headquartered Metal and Industrial Mineral Mining Companies: Size of Issuer \$100,000,001 - 500,000,000 (U.S. \$ per hour)

Extracted from U.S. Mining Salaries, Wages & Benefits, 2020 Survey Results.

		Salary	Total Compensation
CEO	Maximum	938,900	6,550,400
	Minimum	73,200	73,200
	Average	483,000	1,950,000
President	Maximum	813,500	3,550,400
	Minimum	73,200	73,200
	Average	456,400	1,795,100
Vice President	Maximum	500,000	3,869,900
	Minimum	30,000	60,000
	Average	296,400	1,054,300
CFO	Maximum	500,000	2,198,100
	Minimum	30,000	60,000
	Average	254,300	766,200

GLOBAL MINING FOOTPRINT

Whether you are working in the U.S. or abroad, Brunel's global presence provides recruitment and workforce services, anywhere in the world.

Below are some of our key mining projects:

- **Resolution Project, Kennecott Smelter Shutdown, Holden Mine Remediation** - U.S.
- **Byerwen Project, Fitzroy Australia Resources, Poitrel Overburden Project, Grosvenor Minesite, Barbara Minesite** – Australia
- **Udaipur Project** – India
- **Peschanka/Baimskaya Copper Field** – Russia and Kazakhstan
- **Jansen Project** – Canada
- **Grasberg** – Indonesia

