NATIONAL MINING ASSOCIATION

Powering Jobs and Prosperity Across America: The 2025 Economic Contributions of U.S. Mining

Jobs, labor income and GDP supported by coal, metal ore and non-metallic mineral mining, nationally and by state

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A report prepared by the National Mining Association

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Executive Summary

America's economic strength starts with mining. Nearly 12,600 operations nationwide supply the energy and materials that power manufacturing, build infrastructure and strengthen our national defense. According to the Mine Safety and Health Administration (MSHA), that footprint includes 886 coal mines and 11,682 metal and non-metallic mineral mines in fiscal year 2025.

1.64 million
Total jobs supported
Direct, indirect and induced

506,248
Direct mining jobs
Operations, support and transport

$222.3 billion
Contribution to GDP
Value added, all effects

$113.4 billion
Labor income
Wages, benefits, proprietors' income

Key findings

- U.S. mining directly employed 506,248 workers in 2025, including mine operators, contractors, support services and transportation of mine output, and supported 1,130,504 additional jobs in other industries.
- MSHA reported 312,669 mine operator and contractor jobs in 2025 at about 12,600 U.S. mining operations.
- Every direct mining job supported roughly 2.2 jobs elsewhere in the economy.
- Mining contributed $222.3 billion to U.S. GDP, including $99.3 billion in direct value added, and $113.4 billion in labor income.

National Results

U.S. mining directly and indirectly supported 1.6 million full-time and part-time jobs in 2025, including employees and the self-employed. Labor income associated with U.S. mining reached $113.4 billion, which includes wages and salaries, employee benefits and proprietors' income.

Table E-1. Economic Contribution of U.S. Mining, 2025

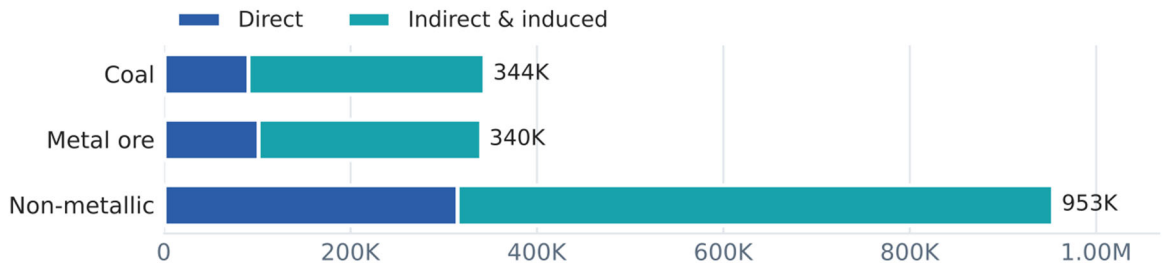
Item	Direct	Indirect & Induced	Total
Employment	506,248	1,130,504	1,636,752
Labor Income ($ billions)	$38.6	$74.8	$113.4
Contribution to GDP ($ billions)	$99.3	$123.0	$222.3

Source: NMA calculations based on MSHA, BLS, BEA and STB data. See Methodology.

Contribution by Mining Segment

Results are reported for three segments: coal, metal ore and non-metallic minerals. The direct contribution of each segment includes mine operations, the support services that mines purchase, and transportation of mine output to the purchaser.

Figure 1. Total Jobs Supported by Mining Segment, 2025



Source: NMA calculations. See Table 1.

Coal Mining

The coal segment accounted for 343,704 total jobs, $55.4 billion in total contribution to GDP and $27.9 billion in labor income (Table 1). Annual wages and salaries at coal mining operations averaged approximately $112,000 in 2025.[1]

Coal accounted for approximately 21 percent of mining's total employment contribution, 25 percent of its contribution to GDP and 25 percent of labor income.

Metal Ore Mining

The metal ore segment accounted for 339,562 jobs, $56.1 billion of GDP and $28.4 billion in labor income. Annual wages and salaries averaged $115,000. Metal ore mining accounted for about 21 percent of total mining employment, 25 percent of GDP contribution and 25 percent of labor income. This segment of the mining industry includes critical minerals and rare earths, serving as an important element of national security and supply chain independence.

Non-metallic Mineral Mining

The non-metallic segment accounted for 953,486 jobs, $110.8 billion of GDP and $57.1 billion in labor income. Annual wages and salaries averaged $87,000. Non-metallic mining represented about 58 percent of mining employment, 50 percent of GDP contribution and 50 percent of labor income.

[1]Average wage and salary data from BLS Quarterly Census of Employment and Wages, 2025. Labor income in Table 1 reflects total employee compensation (including benefits) and self-employment income for mining, support activities and transportation attributable to mining output.

Table 1. Economic Contribution of U.S. Mining by Segment, 2025

	Coal	Metal Ore	Non-metallic	Total
Employment				
Direct	90,339	101,277	314,632	506,248
Indirect & Induced	253,365	238,285	638,854	1,130,504
Total	**343,704**	**339,562**	**953,486**	**1,636,752**
Contribution to GDP ($ billions)				
Direct	$25.4	$23.7	$50.2	$99.3
Indirect & Induced	$30.1	$32.3	$60.6	$123.0
Total	**$55.4**	**$56.1**	**$110.8**	**$222.3**
Labor Income ($ billions)				
Direct	$8.5	$8.9	$21.2	$38.6
Indirect & Induced	$19.3	$19.5	$36.0	$74.8
Total	**$27.9**	**$28.4**	**$57.1**	**$113.4**

Source: NMA calculations. Figures may not sum due to rounding.

What Counts as Direct Employment

Direct employment combines three components:

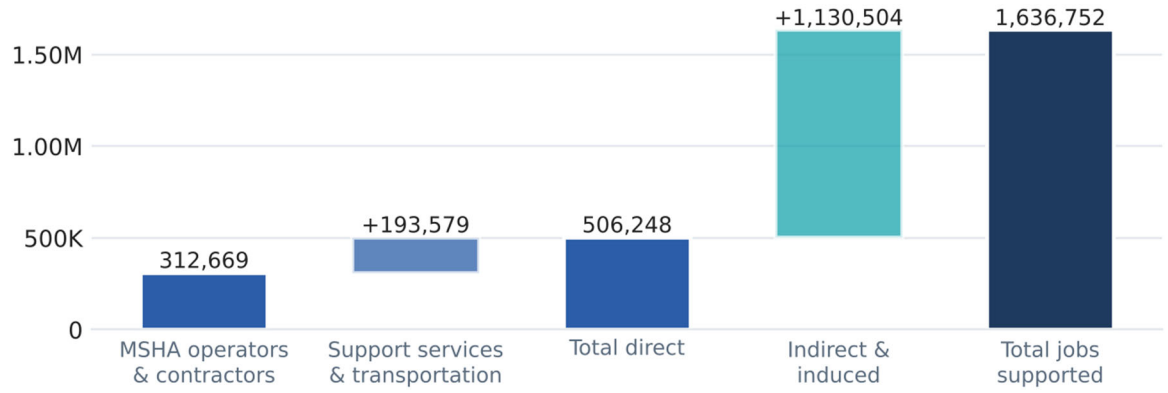
- Mine operators and contractors: employment reported to MSHA by mine operators and by contractors working at mines (2025 annual average).
- Support services: contract drilling, blasting, exploration and other services that mines purchase but MSHA does not capture. Earlier editions measured these with segment-specific industry data that is no longer published. For 2025, they are estimated from MSHA employment (see Methodology).
- Transportation: rail, truck and water jobs moving mine output to purchasers, estimated from mining freight volumes (see Methodology).

Table 2. Components of Direct Employment by Segment, 2025

Component	Coal	Metal Ore	Non-metallic	Total
Mine operators & contractors (MSHA)	62,202	61,612	188,855	312,669
Support services and transportation (estimated)	28,137	39,665	125,777	193,579
Total direct	**90,339**	**101,277**	**314,632**	**506,248**

Source: MSHA Part 50; NMA estimates. MSHA operator and contractor employment is shown after contractors are allocated to commodity groups. Support services and transportation are shown together.

Figure 2. From Mine Headcount to Total Jobs Supported, 2025



Source: NMA calculations. See Tables E-1 and 2.

Mining and the Economy by State

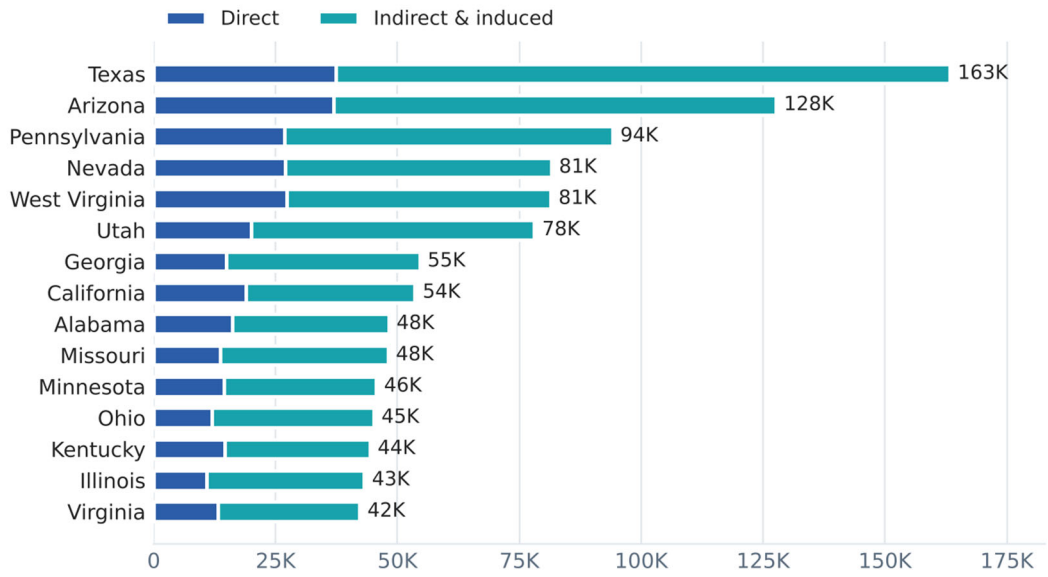
Mining supports jobs and income in every state, with average salaries that significantly exceed the U.S. average. Texas, Arizona and Pennsylvania had the most mining-supported jobs in 2025, and the 10 leading states together accounted for 51 percent of the national total. Texas's lead comes from non-metallic minerals, which account for 81 percent of its mining-supported jobs. Texas is the nation's largest producer of crushed stone, construction sand and gravel, and cement, according to the U.S. Geological Survey.

Table 3. Top 10 States by Total Mining-Supported Employment, 2025

Rank	State	Total Jobs	Direct Jobs	Total GDP ($M)	Labor Income ($M)
1	Texas	163,274	37,336	19,611	10,303
2	Arizona	127,625	36,826	15,279	6,677
3	Pennsylvania	94,074	26,771	13,447	7,151
4	Nevada	81,493	26,899	15,186	8,097
5	West Virginia	81,399	27,252	20,680	9,980
6	Utah	78,020	19,997	8,608	4,275
7	Georgia	54,534	14,928	5,930	3,036
8	California	53,524	18,841	7,931	4,247
9	Alabama	48,159	16,128	7,857	3,929
10	Missouri	48,031	13,695	3,057	1,520

Source: Tables 4 and 5.

Figure 3. Top 15 States by Total Mining-Supported Jobs, 2025

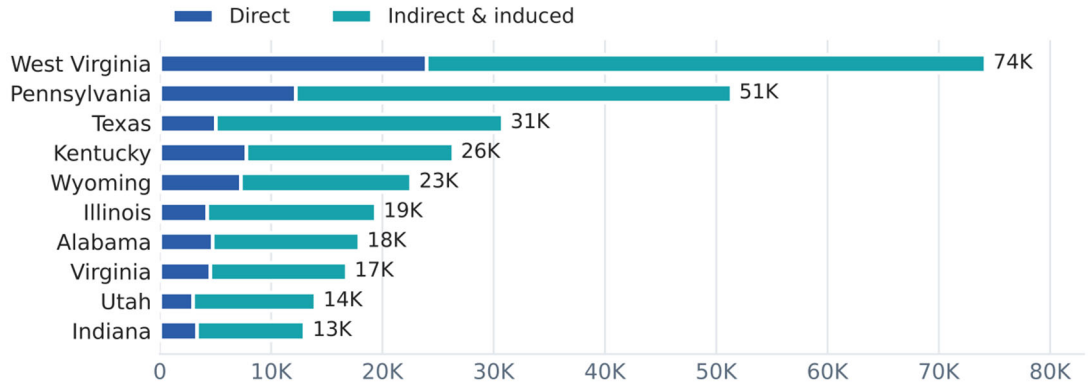


Source: NMA calculations. See Table 4.

State estimates include each state's share of activity that crosses state lines, such as a mine in one state buying equipment made in another, or mining-supported workers spending their wages in a neighboring state. That activity is attributed to the state where the mining occurs, in proportion to the state's own spillover effects. The District of Columbia, which has no mines, is not shown.

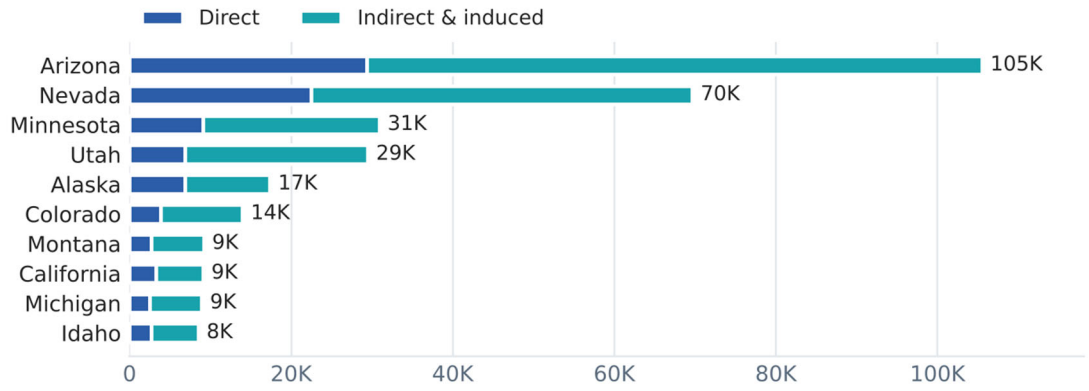
Leading States by Segment

Figure 4. Coal Mining: Top 10 States by Total Jobs Supported, 2025



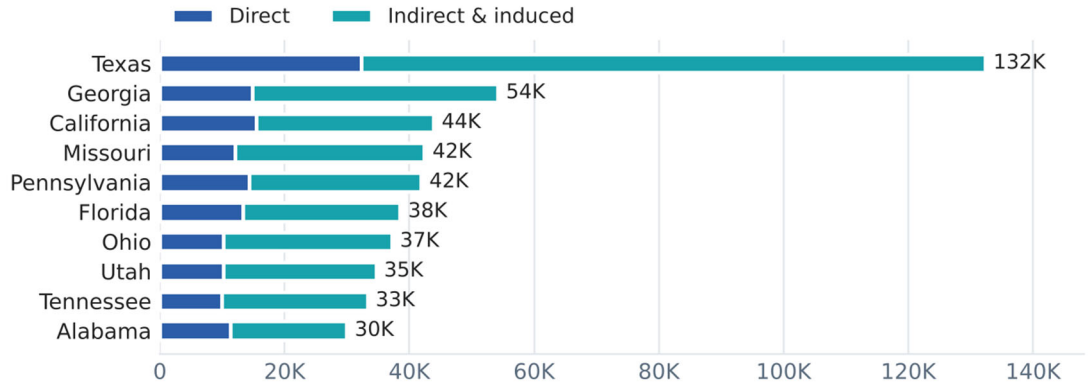
Source: NMA calculations. See Table 6.

Figure 5. Metal Ore Mining: Top 10 States by Total Jobs Supported, 2025



Source: NMA calculations. See Table 8.

Figure 6. Non-metallic Mining: Top 10 States by Total Jobs Supported, 2025



Source: NMA calculations. See Table 10.

All Mining: State Detail

The tables below present direct, indirect and induced employment, GDP and labor income for all U.S. mining by state.

Table 4. U.S. Mining Employment by State, 2025

State	Direct	Indirect & Induced	Total
Alabama	16,128	32,031	48,159
Alaska	8,082	12,011	20,093
Arizona	36,826	90,799	127,625
Arkansas	5,328	7,844	13,172
California	18,841	34,683	53,524
Colorado	13,133	28,921	42,054
Connecticut	1,635	2,057	3,692
Delaware	209	308	517
Florida	14,183	26,990	41,173
Georgia	14,928	39,606	54,534
Hawaii	673	1,200	1,873
Idaho	7,141	12,832	19,973
Illinois	10,854	32,259	43,113
Indiana	11,362	25,125	36,487
Iowa	5,544	9,337	14,881
Kansas	4,639	6,463	11,102
Kentucky	14,553	29,736	44,289
Louisiana	4,685	10,931	15,616
Maine	2,011	2,632	4,643
Maryland	5,538	14,602	20,140
Massachusetts	2,567	3,579	6,146
Michigan	9,077	19,056	28,133
Minnesota	14,441	31,151	45,592
Mississippi	3,527	4,952	8,479
Missouri	13,695	34,336	48,031
Montana	6,880	15,675	22,555
Nebraska	2,149	3,818	5,967
Nevada	26,899	54,594	81,493
New Hampshire	1,376	1,721	3,097
New Jersey	3,018	6,852	9,870
New Mexico	7,096	11,054	18,150
New York	7,632	12,722	20,354
North Carolina	10,091	18,094	28,185
North Dakota	3,536	7,580	11,116
Ohio	11,857	33,209	45,066
Oklahoma	6,515	17,018	23,533
Oregon	4,258	5,447	9,705
Pennsylvania	26,771	67,303	94,074
Rhode Island	585	663	1,248
South Carolina	5,857	14,212	20,069
South Dakota	2,220	2,998	5,218
Tennessee	11,268	26,942	38,210
Texas	37,336	125,938	163,274
Utah	19,997	58,023	78,020
Vermont	1,796	2,172	3,968
Virginia	13,247	28,941	42,188
Washington	6,373	7,924	14,297
West Virginia	27,252	54,147	81,399
Wisconsin	7,512	13,639	21,151
Wyoming	15,127	26,377	41,504
U.S. Total	**506,248**	**1,130,504**	**1,636,752**

Source: NMA calculations from MSHA Part 50, STB, BEA RIMS II and BLS employment requirements. Direct employment includes mine operators and contractors, estimated support services and transportation of mine output. Figures may not sum due to rounding.

Table 5. U.S. Mining GDP and Labor Income by State, 2025 (millions of dollars)

State	Direct GDP	Indirect & Induced GDP	Total GDP	Total Labor Income
Alabama	3,607	4,250	7,857	3,929
Alaska	3,289	3,409	6,698	3,519
Arizona	6,840	8,439	15,279	6,677
Arkansas	477	511	989	513
California	3,568	4,364	7,931	4,247
Colorado	2,132	3,546	5,678	3,077
Connecticut	202	203	406	200
Delaware	10	13	23	12
Florida	2,051	2,453	4,504	2,326
Georgia	2,428	3,503	5,930	3,036
Hawaii	129	118	247	123
Idaho	2,184	2,515	4,699	2,554
Illinois	2,131	3,250	5,381	2,763
Indiana	2,207	2,666	4,873	2,515
Iowa	517	475	992	500
Kansas	463	547	1,010	497
Kentucky	2,965	3,610	6,575	3,268
Louisiana	624	646	1,269	627
Maine	106	109	216	113
Maryland	656	622	1,278	702
Massachusetts	476	495	971	510
Michigan	1,542	2,248	3,790	1,976
Minnesota	1,731	2,909	4,640	2,593
Mississippi	383	388	771	403
Missouri	1,396	1,661	3,057	1,520
Montana	1,772	1,867	3,639	1,877
Nebraska	230	238	468	240
Nevada	6,359	8,827	15,186	8,097
New Hampshire	288	305	593	293
New Jersey	802	1,027	1,829	910
New Mexico	1,700	1,406	3,106	1,500
New York	1,186	1,120	2,305	1,106
North Carolina	1,664	2,122	3,786	1,950
North Dakota	881	815	1,695	929
Ohio	1,865	2,467	4,332	2,297
Oklahoma	950	1,135	2,085	1,065
Oregon	482	522	1,004	512
Pennsylvania	5,474	7,973	13,447	7,151
Rhode Island	121	122	243	113
South Carolina	1,096	1,540	2,635	1,391
South Dakota	215	219	434	233
Tennessee	1,739	2,373	4,111	2,092
Texas	7,370	12,241	19,611	10,303
Utah	3,626	4,982	8,608	4,275
Vermont	330	234	564	291
Virginia	3,118	3,544	6,662	3,517
Washington	576	628	1,204	623
West Virginia	10,575	10,105	20,680	9,980
Wisconsin	1,151	1,257	2,408	1,259
Wyoming	3,616	2,959	6,575	3,171
U.S. Total	**99,298**	**122,975**	**222,274**	**113,376**

Source: NMA calculations from BEA SAGDP2 2025, BLS QCEW, STB, BEA RIMS II and BEA input-output accounts. Nominal dollars. Figures may not sum due to rounding.

Coal Mining by State

Coal mining supported 343,704 jobs in 2025. The leading states were West Virginia (74,166), Pennsylvania (51,326), Texas (30,768) and Kentucky (26,317).

Table 6. Coal Mining Employment by State, 2025

State	Direct	Indirect & Induced	Total
Alabama	4,681	13,200	17,881
Alaska	222	381	603
Arizona	213	641	854
Arkansas	47	117	164
California	160	443	603
Colorado	2,483	7,109	9,592
Connecticut	11	31	42
Delaware	—	—	—
Florida	116	308	424
Georgia	79	219	298
Hawaii	—	—	—
Idaho	191	600	791
Illinois	4,212	15,143	19,355
Indiana	3,328	9,657	12,985
Iowa	8	22	30
Kansas	48	109	157
Kentucky	7,709	18,608	26,317
Louisiana	330	1,158	1,488
Maine	—	—	—
Maryland	2,313	7,789	10,102
Massachusetts	—	—	—
Michigan	99	276	375
Minnesota	181	488	669
Mississippi	517	1,138	1,655
Missouri	159	626	785
Montana	1,649	5,057	6,706
Nebraska	12	33	45
Nevada	79	215	294
New Hampshire	—	—	—
New Jersey	11	31	42
New Mexico	1,255	2,663	3,918
New York	13	37	50
North Carolina	72	208	280
North Dakota	2,162	5,702	7,864
Ohio	1,693	6,198	7,891
Oklahoma	31	110	141
Oregon	103	279	382
Pennsylvania	12,174	39,152	51,326
Rhode Island	—	—	—
South Carolina	58	169	227
South Dakota	11	30	41
Tennessee	186	638	824
Texas	4,962	25,806	30,768
Utah	2,986	10,958	13,944
Vermont	2	6	8
Virginia	4,472	12,278	16,750
Washington	96	181	277
West Virginia	23,945	50,221	74,166
Wisconsin	8	23	31
Wyoming	7,252	15,307	22,559
U.S. Total	**90,339**	**253,365**	**343,704**

Source: NMA calculations from MSHA Part 50, STB, BEA RIMS II and BLS employment requirements. Direct employment includes mine operators and contractors, estimated support services and transportation of mine output. Figures may not sum due to rounding.

Table 7. Coal Mining GDP and Labor Income by State, 2025 (millions of dollars)

State	Direct GDP	Indirect & Induced GDP	Total GDP	Total Labor Income
Alabama	1,342	1,760	3,102	1,534
Alaska	92	73	165	80
Arizona	57	70	127	65
Arkansas	14	15	29	15
California	34	41	75	40
Colorado	494	782	1,276	666
Connecticut	2	2	4	2
Delaware	—	—	—	—
Florida	19	23	42	22
Georgia	20	25	45	23
Hawaii	—	—	—	—
Idaho	81	79	160	83
Illinois	905	1,545	2,450	1,262
Indiana	839	1,142	1,982	1,016
Iowa	1	1	2	1
Kansas	1	1	3	1
Kentucky	1,820	2,386	4,206	2,084
Louisiana	30	33	63	33
Maine	—	—	—	—
Maryland	371	373	743	411
Massachusetts	—	—	—	—
Michigan	26	32	59	30
Minnesota	41	51	92	47
Mississippi	71	77	147	73
Missouri	29	42	71	36
Montana	530	537	1,067	531
Nebraska	3	4	7	3
Nevada	29	36	64	33
New Hampshire	—	—	—	—
New Jersey	3	4	7	4
New Mexico	331	306	637	316
New York	3	4	7	3
North Carolina	17	21	38	19
North Dakota	580	551	1,132	611
Ohio	332	462	794	426
Oklahoma	2	3	5	2
Oregon	21	26	46	24
Pennsylvania	3,013	4,784	7,798	4,175
Rhode Island	—	—	—	—
South Carolina	13	16	30	15
South Dakota	2	2	4	2
Tennessee	45	66	111	60
Texas	651	1,161	1,812	973
Utah	802	1,124	1,926	986
Vermont	—	1	1	—
Virginia	1,204	1,497	2,701	1,409
Washington	14	15	30	15
West Virginia	9,614	9,281	18,895	9,103
Wisconsin	1	2	3	2
Wyoming	1,865	1,605	3,470	1,617
U.S. Total	**25,365**	**30,062**	**55,427**	**27,855**

Source: NMA calculations from BEA SAGDP2 2025, BLS QCEW, STB, BEA RIMS II and BEA input-output accounts. Nominal dollars. Figures may not sum due to rounding.

Metal Ore Mining by State

Metal ore mining supported 339,562 jobs in 2025. The leading states were Arizona (105,480), Nevada (69,628), Minnesota (30,878) and Utah (29,458).

Table 8. Metal Ore Mining Employment by State, 2025

State	Direct	Indirect & Induced	Total
Alabama	124	244	368
Alaska	6,849	10,483	17,332
Arizona	29,382	76,098	105,480
Arkansas	750	1,199	1,949
California	3,244	5,827	9,071
Colorado	3,875	10,074	13,949
Connecticut	—	—	—
Delaware	84	180	264
Florida	749	1,537	2,286
Georgia	21	44	65
Hawaii	—	—	—
Idaho	2,641	5,834	8,475
Illinois	36	100	136
Indiana	8	17	25
Iowa	—	—	—
Kansas	—	—	—
Kentucky	—	—	—
Louisiana	1,377	3,767	5,144
Maine	—	—	—
Maryland	—	—	—
Massachusetts	—	—	—
Michigan	2,517	6,383	8,900
Minnesota	9,092	21,786	30,878
Mississippi	—	—	—
Missouri	1,449	3,417	4,866
Montana	2,714	6,447	9,161
Nebraska	—	—	—
Nevada	22,505	47,123	69,628
New Hampshire	—	—	—
New Jersey	—	—	—
New Mexico	2,094	3,382	5,476
New York	346	727	1,073
North Carolina	17	45	62
North Dakota	—	—	—
Ohio	—	—	—
Oklahoma	—	—	—
Oregon	54	80	134
Pennsylvania	282	592	874
Rhode Island	—	—	—
South Carolina	1,957	5,582	7,539
South Dakota	494	829	1,323
Tennessee	1,214	2,908	4,122
Texas	42	166	208
Utah	6,888	22,570	29,458
Vermont	—	—	—
Virginia	236	474	710
Washington	61	125	186
West Virginia	167	232	399
Wisconsin	—	—	—
Wyoming	8	13	21
U.S. Total	**101,277**	**238,285**	**339,562**

Source: NMA calculations from MSHA Part 50, STB, BEA RIMS II and BLS employment requirements. Direct employment includes mine operators and contractors, estimated support services and transportation of mine output. Metal and non-metallic employment is assigned to segments using MSHA commodity groups. Figures may not sum due to rounding.

Table 9. Metal Ore Mining GDP and Labor Income by State, 2025 (millions of dollars)

State	Direct GDP	Indirect & Induced GDP	Total GDP	Total Labor Income
Alabama	76	124	200	113
Alaska	3,041	3,211	6,252	3,294
Arizona	6,006	7,409	13,414	5,716
Arkansas	73	109	182	103
California	618	924	1,542	891
Colorado	853	1,655	2,508	1,429
Connecticut	—	—	—	—
Delaware	4	7	11	6
Florida	162	242	404	229
Georgia	6	11	17	10
Hawaii	—	—	—	—
Idaho	914	1,276	2,191	1,231
Illinois	10	19	28	16
Indiana	2	3	5	3
Iowa	—	—	—	—
Kansas	—	—	—	—
Kentucky	—	—	—	—
Louisiana	242	228	470	203
Maine	—	—	—	—
Maryland	—	—	—	—
Massachusetts	—	—	—	—
Michigan	545	960	1,505	792
Minnesota	1,198	2,247	3,445	1,962
Mississippi	—	—	—	—
Missouri	194	221	415	178
Montana	622	773	1,394	739
Nebraska	—	—	—	—
Nevada	5,616	8,033	13,649	7,314
New Hampshire	—	—	—	—
New Jersey	—	—	—	—
New Mexico	549	419	968	406
New York	92	69	161	64
North Carolina	5	9	14	8
North Dakota	—	—	—	—
Ohio	—	—	—	—
Oklahoma	—	—	—	—
Oregon	10	14	24	13
Pennsylvania	85	150	234	140
Rhode Island	—	—	—	—
South Carolina	369	702	1,071	598
South Dakota	65	89	153	87
Tennessee	396	482	878	390
Texas	192	417	609	357
Utah	1,519	2,203	3,722	1,748
Vermont	—	—	—	—
Virginia	92	122	214	128
Washington	7	8	15	7
West Virginia	90	112	202	110
Wisconsin	—	—	—	—
Wyoming	89	97	186	99
U.S. Total	**23,740**	**32,345**	**56,085**	**28,382**

Source: NMA calculations from BEA SAGDP2 2025, BLS QCEW, STB, BEA RIMS II and BEA input-output accounts. Nominal dollars. Figures may not sum due to rounding.

Non-metallic Mineral Mining by State

Non-metallic mineral mining supported 953,486 jobs in 2025. The leading states were Texas (132,298), Georgia (54,171), California (43,850) and Missouri (42,380).

Table 10. Non-metallic Mineral Mining Employment by State, 2025

State	Direct	Indirect & Induced	Total
Alabama	11,323	18,587	29,910
Alaska	1,011	1,147	2,158
Arizona	7,231	14,060	21,291
Arkansas	4,531	6,528	11,059
California	15,437	28,413	43,850
Colorado	6,775	11,738	18,513
Connecticut	1,624	2,026	3,650
Delaware	125	128	253
Florida	13,318	25,145	38,463
Georgia	14,828	39,343	54,171
Hawaii	673	1,200	1,873
Idaho	4,309	6,398	10,707
Illinois	6,606	17,016	23,622
Indiana	8,026	15,451	23,477
Iowa	5,536	9,315	14,851
Kansas	4,591	6,354	10,945
Kentucky	6,844	11,128	17,972
Louisiana	2,978	6,006	8,984
Maine	2,011	2,632	4,643
Maryland	3,225	6,813	10,038
Massachusetts	2,567	3,579	6,146
Michigan	6,461	12,397	18,858
Minnesota	5,168	8,877	14,045
Mississippi	3,010	3,814	6,824
Missouri	12,087	30,293	42,380
Montana	2,517	4,171	6,688
Nebraska	2,137	3,785	5,922
Nevada	4,315	7,256	11,571
New Hampshire	1,376	1,721	3,097
New Jersey	3,007	6,821	9,828
New Mexico	3,747	5,009	8,756
New York	7,273	11,958	19,231
North Carolina	10,002	17,841	27,843
North Dakota	1,374	1,878	3,252
Ohio	10,164	27,011	37,175
Oklahoma	6,484	16,908	23,392
Oregon	4,101	5,088	9,189
Pennsylvania	14,315	27,559	41,874
Rhode Island	585	663	1,248
South Carolina	3,842	8,461	12,303
South Dakota	1,715	2,139	3,854
Tennessee	9,868	23,396	33,264
Texas	32,332	99,966	132,298
Utah	10,123	24,495	34,618
Vermont	1,794	2,166	3,960
Virginia	8,539	16,189	24,728
Washington	6,216	7,618	13,834
West Virginia	3,140	3,694	6,834
Wisconsin	7,504	13,616	21,120
Wyoming	7,867	11,057	18,924
U.S. Total	**314,632**	**638,854**	**953,486**

Source: NMA calculations from MSHA Part 50, STB, BEA RIMS II and BLS employment requirements. Direct employment includes mine operators and contractors, estimated support services and transportation of mine output. Metal and non-metallic employment is assigned to segments using MSHA commodity groups. Figures may not sum due to rounding.

Table 11. Non-metallic Mineral Mining GDP and Labor Income by State, 2025 (millions of dollars)

State	Direct GDP	Indirect & Induced GDP	Total GDP	Total Labor Income
Alabama	2,189	2,365	4,554	2,282
Alaska	157	124	281	145
Arizona	777	961	1,738	895
Arkansas	390	387	777	395
California	2,915	3,399	6,314	3,317
Colorado	785	1,109	1,894	982
Connecticut	200	201	402	198
Delaware	6	6	12	6
Florida	1,869	2,188	4,057	2,076
Georgia	2,401	3,467	5,868	3,003
Hawaii	129	118	247	123
Idaho	1,189	1,160	2,348	1,240
Illinois	1,216	1,686	2,903	1,485
Indiana	1,366	1,520	2,886	1,497
Iowa	516	474	990	499
Kansas	462	545	1,007	496
Kentucky	1,145	1,224	2,369	1,184
Louisiana	351	385	736	391
Maine	106	109	216	113
Maryland	285	250	535	291
Massachusetts	476	495	971	510
Michigan	970	1,256	2,226	1,153
Minnesota	492	610	1,102	584
Mississippi	312	312	624	329
Missouri	1,173	1,398	2,571	1,307
Montana	620	557	1,177	608
Nebraska	227	235	462	236
Nevada	714	758	1,472	750
New Hampshire	288	305	593	293
New Jersey	799	1,023	1,822	906
New Mexico	821	680	1,500	778
New York	1,091	1,047	2,138	1,038
North Carolina	1,642	2,091	3,733	1,923
North Dakota	300	263	564	318
Ohio	1,533	2,005	3,538	1,872
Oklahoma	948	1,132	2,080	1,062
Oregon	452	483	934	475
Pennsylvania	2,376	3,039	5,415	2,836
Rhode Island	121	122	243	113
South Carolina	713	822	1,535	778
South Dakota	149	128	277	144
Tennessee	1,298	1,825	3,122	1,643
Texas	6,527	10,663	17,191	8,973
Utah	1,305	1,655	2,960	1,540
Vermont	329	233	563	290
Virginia	1,822	1,925	3,747	1,980
Washington	556	605	1,160	601
West Virginia	871	711	1,582	767
Wisconsin	1,150	1,256	2,405	1,257
Wyoming	1,662	1,257	2,919	1,455
U.S. Total	**50,193**	**60,568**	**110,761**	**57,138**

Source: NMA calculations from BEA SAGDP2 2025, BLS QCEW, STB, BEA RIMS II and BEA input-output accounts. Nominal dollars. Figures may not sum due to rounding.

Methodology

The economic contribution of U.S. mining includes its direct activity plus the activity of other industries linked to mining through supply chains and household spending.

- Direct contributions: mine operations, support services purchased by mines, and transportation of mine output to the purchaser.
- Indirect contributions: activity at upstream suppliers to mining, such as equipment manufacturers, energy providers and service firms, and at their own suppliers.
- Induced contributions: household spending by workers employed directly and indirectly throughout the supply chain.

The 2021 edition estimated these effects with the IMPLAN model. The state-level IMPLAN contribution data used for that report is no longer available, so this edition is built from published federal sources, chiefly the Bureau of Economic Analysis (BEA) 2023 Regional Input-Output Modeling System (RIMS II), with ratios from the 2021 analysis used where no current federal series exists. All three measures (employment, labor income and GDP) are estimated with RIMS II, supplemented by BEA and Bureau of Labor Statistics (BLS) national input-output data to capture activity that crosses state lines.

How Each Measure Is Estimated

Measure	Approach
Direct effects	
Mine operators & contractors	MSHA Part 50, 2025 final annual average, by state and commodity group. Contractors, reported only as coal or metal/non-metal, are allocated to commodity groups in proportion to each state's operator employment
Support services	2021 support-to-MSHA ratios (coal 17.9%, metal 56.3%, non-metallic 22.0%) applied to 2025 MSHA employment; distributed to states using 2021 state shares
Transportation	2021 transportation employment scaled by 2021–2025 mining freight growth from STB Freight Commodity Statistics (coal ×0.949, metal ×2.122, non-metallic ×1.294). Metal and non-metallic transportation jobs are distributed to states and commodity groups in proportion to MSHA employment
Direct GDP	BEA SAGDP2 2025, mining except oil and gas ($81.2 billion). Coal is allocated by MSHA employment share; the metal and non-metallic remainder is divided using BLS QCEW 2025 wages for NAICS 2122 and 2123. Plus transportation value added ($18.1 billion)
Direct labor income	Mining GDP multiplied by each industry's labor share of value added from BEA's 2017 detailed Use table, including proprietors' income: coal 30%, copper, nickel, lead and zinc 23%, other metals 44%, stone 36%, sand, gravel and other non-metallic 46%; plus 50% of transportation GDP
Indirect and induced effects within each state	
Employment	RIMS II Type II direct-effect employment multipliers by state and commodity group. Mine and transportation jobs use the mining industry multiplier; support jobs use the support-activities multiplier (21311A)
Labor income	RIMS II Type II direct-effect earnings multipliers applied to direct labor income
GDP	RIMS II Type II final-demand value-added multipliers applied to direct output. Direct output equals direct GDP divided by each industry's value-added share of output from BEA's 2017 detailed Use table, scaled so the industries average the 2025 share for mining except oil and gas (54.6%) from BEA's GDP-by-industry accounts

Measure	Approach
Mining-on-mining effects	Spillovers that land back in mining industries (RIMS II Tables 3.2–3.4) are excluded from all three measures to avoid double counting direct activity, as in the 2021 edition
Effects that cross state lines	
GDP and labor income	National supply-chain and household-spending effects from BEA's 2017 detailed input-output tables (domestic production only), compared with the sum of state RIMS II Type II effects
Employment	National supply-chain jobs from BLS's 2025 domestic employment requirements, compared with the sum of state RIMS II Type I effects

Effects That Cross State Lines

State multipliers count only activity inside the state where it occurs. When a mine in one state buys equipment, fuel or services produced in another state, or when mining-supported workers spend their wages in another state, that activity drops out of the state results. This edition adds it back.

For GDP and labor income, national effects are estimated from BEA's 2017 detailed input-output tables, including household spending, and compared with the sum of the state (Type II) effects from RIMS II. Households are assumed to spend 65 cents of each dollar of labor income on domestically produced goods and services, the economy-wide ratio of domestic personal consumption to GDP. This is conservative: the resulting national household-spending effect is slightly smaller than the one RIMS II assigns to Texas alone, although the national effect should exceed that of any single state.

For employment, national supply-chain jobs from BLS's domestic employment requirements are compared with the sum of state supply-chain (Type I) jobs from RIMS II. BLS publishes no household-spending counterpart, so cross-state jobs cover supply-chain purchases only.

The differences are the activity that crosses state lines: $44.7 billion of GDP, $24.8 billion of labor income and 77,626 jobs. They are attributed to the states where the mining occurs, in proportion to each state's own spillover effects.

Why Support Services Are Estimated

The North American Industry Classification System (NAICS) still defines three support industries for mining: support activities for coal mining (213113), metal mining (213114) and non-metallic minerals mining (213115). The 2021 IMPLAN analysis could allocate support activity to each mining segment. Current BEA regional data and RIMS II multipliers, however, publish one combined "other support activities for mining" industry that also includes oil and gas field services.

BLS employment data for NAICS 213113–213115 also cannot fill the gap. It counts only firms whose primary business is mining support, far fewer than the support activity mines actually purchase, because most contract drillers, blasters and maintenance crews work for firms classified in construction, equipment rental or professional services. This edition therefore applies each segment's 2021 ratio of support jobs to MSHA employment to 2025 MSHA employment. The combined support industry's RIMS II multiplier is still used to estimate the indirect and induced effects of those support jobs.

Data Sources

Source	Use	Vintage
MSHA Part 50	Mine operator and contractor employment by state and commodity	2025 annual (final)
MSHA At a Glance	Number of coal and metal/non-metal mines	FY2025
BLS QCEW	Average annual wages by segment; truck and water transportation wages	2025
BEA SAGDP2	State GDP, mining except oil and gas	2025
BEA GDP by Industry	Value added and gross output, mining except oil and gas	2025
BEA RIMS II	Type I and Type II multipliers by state and industry (Tables 3.2–3.5)	2017 benchmark / 2023 regional
BEA Input-Output Accounts	Detailed Use, Make and Import tables: value-added and labor shares; national supply-chain and household-spending model	2017 benchmark
BLS Employment Requirements	Domestic employment requirements by industry	2025
STB Freight Commodity Statistics	Class I rail tonnage and revenue for mining commodities	2025 Q1–Q4
USGS Mineral Commodity Summaries	Leading producing states; value added by industries consuming processed mineral materials (context only)	2026 edition (2025 data)
EIA Monthly Energy Review	Electricity net generation by source, Table 7.2a (context only)	2025
DOE U.S. Energy and Employment Report	Coal electric power generation employment (context only)	2026 edition (2025 data)
NMA, Economic Contributions of U.S. Mining, 2021	Support-services and transportation shares	2021

Relationship to the 2021 Edition

This edition uses different models and data sources than the 2021 edition. Dollar values are in nominal 2025 dollars.

Limitations

- MSHA records contractor employment by the contractor's mailing address rather than where the work occurs, and only as coal or metal/non-metal. Contractors are allocated to states and commodity groups in proportion to operator employment.
- Support services are distributed to states using 2021 state shares and are reported with mine operations rather than separately.
- RIMS II reports no multiplier where an industry has no regional model. For the 7 state and commodity combinations affected (956 MSHA jobs), the multiplier from the other industry in the same segment is used, or the U.S. average for that industry where neither is available.
- Value-added and labor shares by industry come from BEA's 2017 benchmark tables; value-added shares are scaled to the 2025 level for mining except oil and gas.
- Cross-state GDP and labor income depend on the assumed household spending rate (65 cents per dollar of labor income). Each 5-cent change moves total GDP by roughly $6 billion to $7 billion.

- Cross-state employment effects cover supply-chain purchases only. For metal ore mining, the sum of state RIMS II supply-chain jobs already exceeds the BLS national estimate, so no cross-state jobs are added for that segment.
- Indirect and induced employment is estimated per direct job, using RIMS II direct-effect employment multipliers applied to MSHA operator and contractor employment, estimated support services and transportation, consistent with the 2021 edition. GDP and labor income are estimated from direct output and earnings as measured by BEA, which assigns contractor and support-service activity to the industries of the firms that employ those workers. Because the direct employment count is therefore larger relative to output than in BEA's industry data, the employment multiplier effect is larger than the GDP and labor income effects.
- Tax payments are not estimated in this edition.

Scope

This analysis is conservative in that it does not include downstream economic activity from coal and uranium-based electricity generation or from manufacturing and other end users of metals and minerals. Coal and nuclear power together generated about 34 percent of U.S. electricity in 2025, according to the U.S. Energy Information Administration, and coal-fired generation alone employed 63,300 workers, according to the U.S. Department of Energy. Industries that consume processed mineral materials, chiefly construction and durable goods manufacturing, contributed an estimated $4.1 trillion to U.S. GDP in 2025, more than 13 percent of the total, according to the U.S. Geological Survey.

Appendix A. Industry Definitions

This report defines U.S. mining using the 2022 North American Industry Classification System (NAICS), which consolidated several six-digit mining industries used in prior editions.

Table A-1. NAICS Definition of U.S. Mining

NAICS Code	Industry
Coal Mining	
212114	Surface Coal Mining
212115	Underground Coal Mining
Metal Ore Mining	
212210	Iron Ore Mining
212220	Gold Ore and Silver Ore Mining
212230	Copper, Nickel, Lead, and Zinc Mining
212290	Other Metal Ore Mining (incl. uranium-radium-vanadium)
Non-metallic Mineral Mining and Quarrying	
212311	Dimension Stone Mining and Quarrying
212312	Crushed and Broken Limestone Mining and Quarrying
212313	Crushed and Broken Granite Mining and Quarrying
212319	Other Crushed and Broken Stone Mining and Quarrying
212321	Construction Sand and Gravel Mining
212322	Industrial Sand Mining
212323	Kaolin, Clay, and Ceramic and Refractory Minerals Mining
212390	Other Nonmetallic Mineral Mining and Quarrying (incl. potash, soda, borate, phosphate)
Support Activities for Mining	
213113	Support Activities for Coal Mining
213114	Support Activities for Metal Mining
213115	Support Activities for Nonmetallic Minerals (except Fuels) Mining

Source: U.S. Census Bureau, North American Industry Classification System, 2022.

Table A-2. BEA Industries Used for RIMS II Multipliers

Report Segment / MSHA Group	BEA Code	BEA Industry
Coal	212100	Coal mining
Metal Ore: copper, lead, zinc, nickel	212230	Copper, nickel, lead, and zinc mining
Metal Ore: all other metals	2122A0	Iron, gold, silver, and other metal ore mining
Non-metallic: stone (incl. cement and lime)	212310	Stone mining and quarrying
Non-metallic: sand, gravel and other	2123A0	Other nonmetallic mineral mining and quarrying
Support services (all segments)	21311A	Other support activities for mining. Used only as a multiplier for support jobs; it also covers oil and gas support, so it is not used to count jobs

Source: BEA RIMS II, Tables 3.2–3.5, Type I and Type II multipliers (2017 benchmark, 2023 regional data). Transportation activity carries the multipliers of the segment whose output is carried.

Appendix B. The RIMS II Model

The Regional Input-Output Modeling System (RIMS II), produced by the U.S. Bureau of Economic Analysis, provides industry and region-specific multipliers for output, earnings, employment and value added. The multipliers used here are based on the 2017 U.S. benchmark input-output accounts and 2023 regional data.

RIMS II is built around an input-output table that relates each industry's purchases from other industries to the value of its output. Meeting demand in one industry requires purchases from others, which in turn spark further purchases by their suppliers. Employees and business owners spend part of the additional income generated, further increasing demand. Type I multipliers capture direct and indirect (inter-industry) effects. Type II multipliers, used in this report, also capture induced effects from household spending.

The direct-effect employment and earnings multipliers give the total jobs or earnings in a state's economy associated with one direct job or one dollar of direct earnings in the industry; indirect and induced effects equal the direct amount multiplied by the multiplier minus one. The final-demand value-added multiplier gives the total GDP associated with one dollar of the industry's output.

Cross-state effects are measured against national benchmarks: BEA's 2017 detailed input-output tables, including household spending, for GDP and labor income, and BLS's domestic employment requirements for jobs. Type I multipliers are used only for the jobs comparison.

The 2021 edition of this report used IMPLAN, a proprietary input-output model also built primarily on federal data. Support-services and transportation shares from that analysis are used in this edition where noted in the Methodology.

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