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QUEENSLAND MAJOR CONTRACTORS ASSOCIATION

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Queensland
Major Projects Pipeline
2026



Contents

Executive Summary	1
Key Findings	7
Key Statistics	8
Key Risks and Opportunities	9
Cost Issues	11
Industry Capacity and Capability	13
Supply Chain Capacity and Capability	17
Project Development and Delivery	21
Productivity Update and Opportunities	23
Queensland Major Projects Pipeline 2026	27
The Pipeline 2026 to 2031	53
CSQ Labour and Skills Report	59
Sector Outlook	75
Regional Pipeline Summary	83



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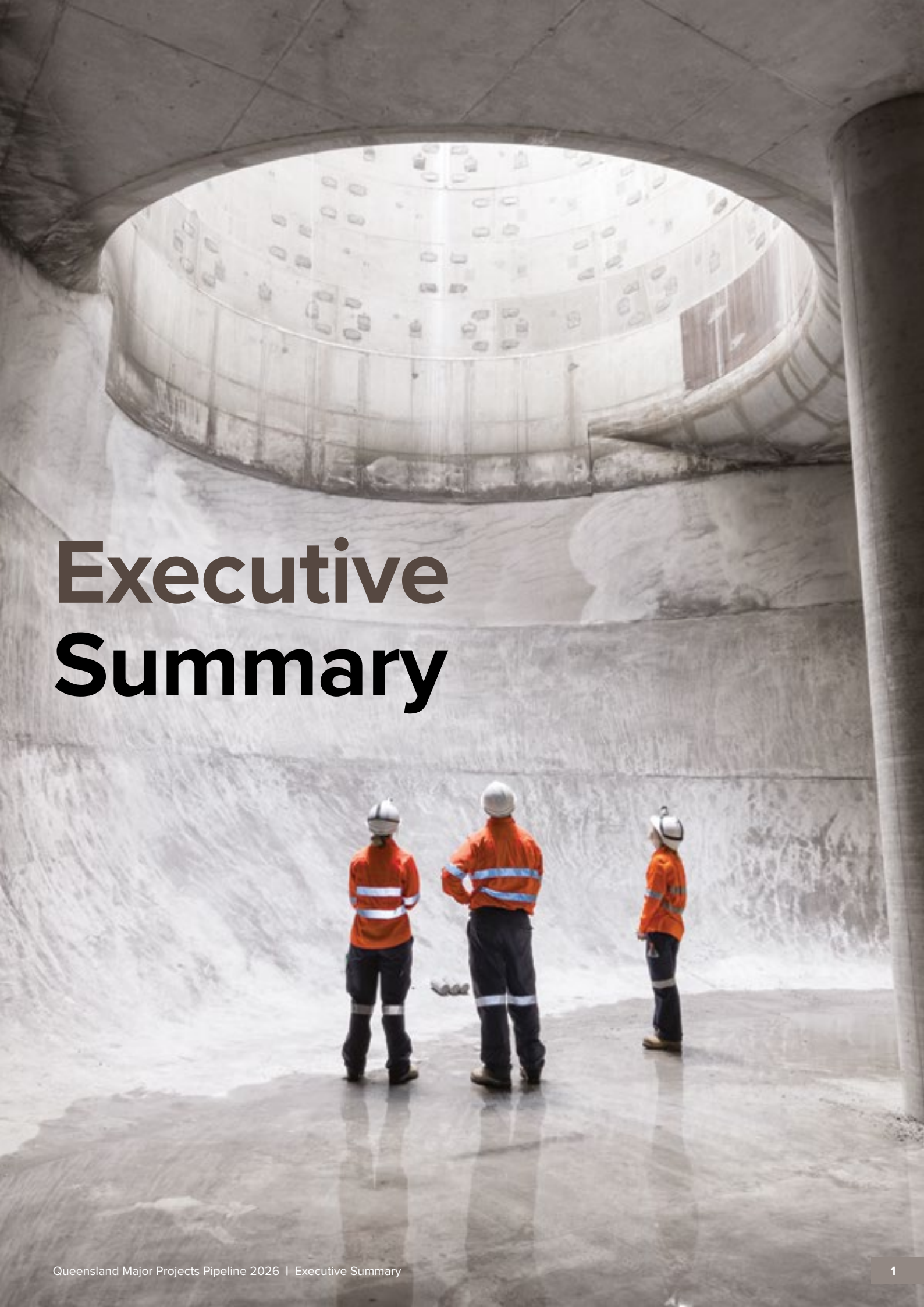
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The full Queensland Major Projects Pipeline Report, including regional pipeline summary and sector outlook, is available online at www.qmca.com.au



Executive Summary

Queensland is embarking on a massive $139.5b major projects pipeline across the engineering construction sector driven by investment in economic and social infrastructure, much of it with a tight deadline of 2032. This dwarfs the $112b of work delivered in the last major construction boom between 2011 and 2016. This unprecedented investment offers the opportunity to deliver not just legacy infrastructure for communities and the economy but also the construction industry in terms of capability and capacity. The Queensland Major Projects Pipeline Report (QMPPR/Report) continues to highlight these opportunities and be the barometer of major public and private engineering and construction works in this state.

This year marks the 15th instalment of the Report, brought to you by QMCA and Cbus. It has been developed in conjunction with Construction Skills Queensland (CSQ), Queensland Economic Advocacy Solutions (QEAS), Arup, Laing O'Rourke, Rider Levett Bucknall (RLB), Brisbane Economic Development Agency (BEDA) and Aurora Marketing.

The 2026 pipeline, spanning 371 projects, represents a significant expansion in both the number of projects (+21%) and the total value of the works (+9%) from the $127.5b 2025 Report. It demonstrates an active but increasingly congested project landscape. Interestingly, the average project value in the 2026 pipeline has fallen to $376m from $417m in 2025.

A deeper look at the data reveals that this growth is highly asymmetrical. The expansion of the pipeline has largely been driven by unfunded activity, which has grown nearly three times faster than funded commitments. This trend indicates rising delivery uncertainty, planning backlogs and structural constraints across Queensland's major project landscape, but also a growing confidence in Queensland as a destination for infrastructure investment.

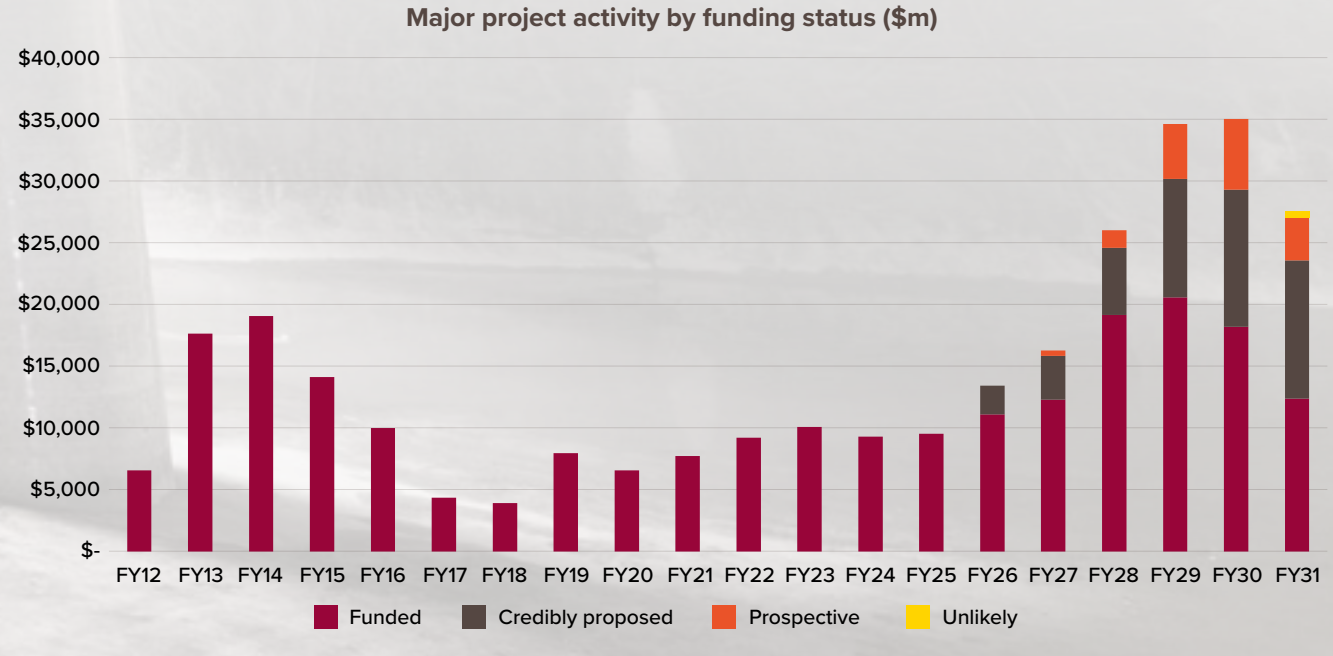
A comparison of the 2025 and 2026 pipelines

The 2025 Report projected a five-year pipeline totalling $127.5b across the FY26 to FY30 window. In contrast, this year's Report shifts the five-year window to cover FY27 to FY31, with a larger headline total of $139.5b. However, the overall expansion is heavily driven by the addition of the new outer year, FY31, which alone introduces $27.5b in activity ($12.4b funded and $15.2b unfunded) rather than any immediate growth in near-term project delivery.

The 2025 Report identified $14.6b of work in FY26; analysis of the 2026 pipeline highlights that only $11.1b of work was delivered. This near-term slowdown intensifies in FY27, where funded activity projections reduce from $15.7b in the 2025 Report to $12.3b in this year's pipeline. This near-term contraction reflects a broader 'delivery conundrum' in which projects struggle to exit procurement and planning processes due to increasingly complex processes that can delay project commencements by up to 12 months, prolonged environmental reviews, and ongoing overall project lifecycle productivity.

These delayed projects have been rescheduled and stacked into the later years of the decade, creating a highly compressed outer-year peak. In the 2025 Report, funded commitments were expected to peak in FY28 at $16.9b and progressively decline in subsequent years. In this Report, the peak has shifted to FY29, where funded activity is now projected to surge to $20.6b – an increase of $4.9b (+32%) over previous projections. Funded activity remains elevated in FY30 at $18.2b (a $2.9b increase). Simultaneously, uncommitted unfunded projects are compounding this backlog, rising by $502m in FY29 (to $14.1b) and surging by $2.9b in FY30 (to $16.9b).

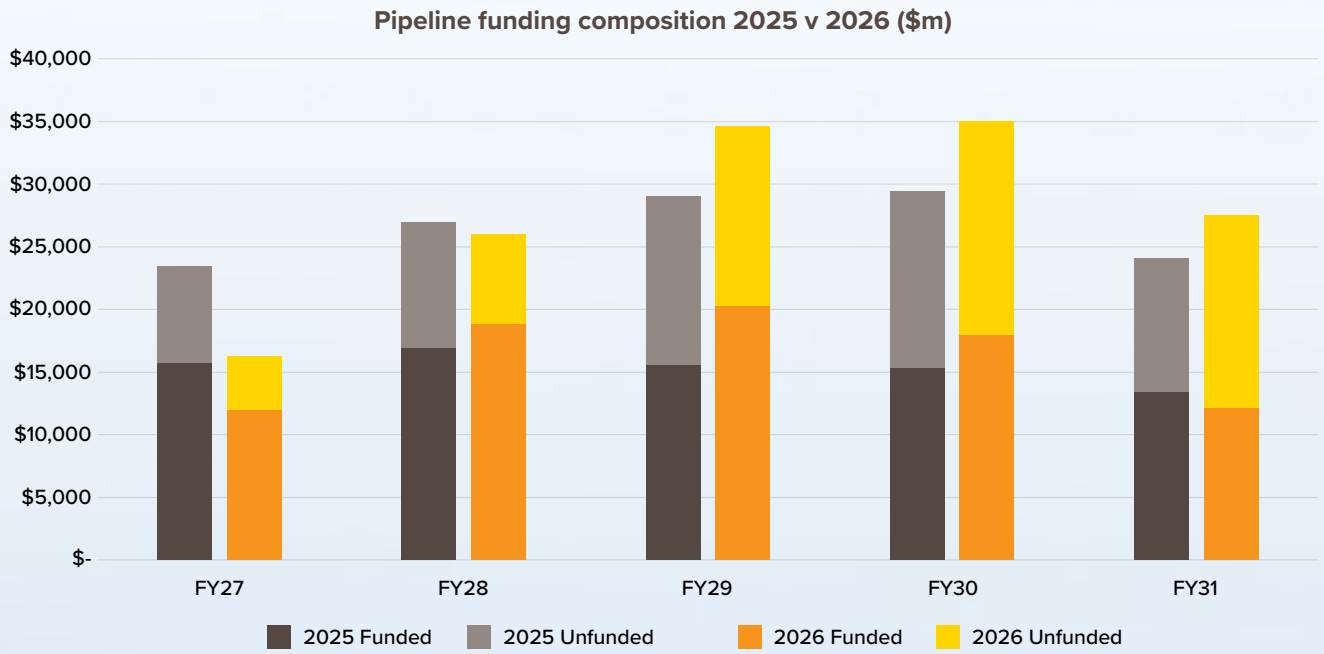
This restructuring of the pipeline concentrates a massive volume of work in FY29 and FY30, where total pipeline annual project activity is projected to exceed $34.6b and $35b respectively. This extreme outer-year peak creates some systemic risks, with rapid consolidation expected to place intense, immediate pressure on civil construction resources, including labour, plant and equipment, and raw materials such as steel and quarry products. Without direct, coordinated public and private sector intervention to streamline approvals and balance procurement schedules, this concentrated backlog will have an impact on productivity and sustain upward pressure on overall project delivery costs across Queensland.



Source: Queensland Economic Advocacy Solutions, QMCA analysis

Funding composition: funded vs unfunded

The funding status of the identified projects reveals a shift towards more funded work (in total value) over the five-year timeframe. The funded pipeline, which represents active and committed work, is valued at $82.5b, representing 59% of the total pipeline value. While the volume of funded work has increased from the 2025 Report, the proportion of it as part of the total pipeline has dropped. This committed segment covers 233 projects, comprising 166 public and 67 private projects. It represents a year-on-year growth of +$4.4b (+6%) from the $78.1b recorded in 2025, with an average funded project value of $354m.



Source: Queensland Economic Advocacy Solutions, QMCA analysis

In contrast, the unfunded portion of the pipeline has grown more substantially, reaching a total value of $56.9b, or 41% of the total pipeline. This uncommitted portion spans 138 projects, comprising 55 public and 83 private proposals. The unfunded pipeline grew year-on-year by +$7.6b (+15%) from $49.4b in 2025, with the average value of these unfunded projects sitting at $413m.

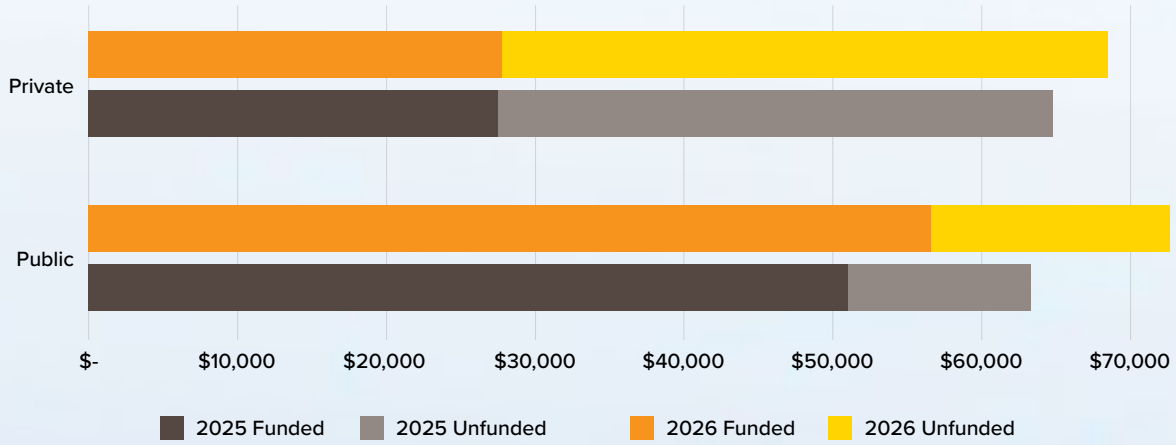
While the headline value of the pipeline grew by 9%, unfunded activity increased by a larger proportion (15%) than funded activity. Approved funded work is increasingly being pushed out into later years, which cannot continue with critical time deadlines looming, while the list of unfunded proposals continues to stack up due to planning delays, complex procurement guidelines and lengthy environmental approval processes. This disproportionate growth between funded and unfunded works, particularly in the outer years, reinforces the need to convert these projects into funded works over the next few years.

Public vs private sector

The 2026 Report highlights the differences in project progression between public infrastructure and private capital, detailing how project volumes, funding shares and total asset values between the public and private sectors are distributed.

A comparison of the five-year outlook in the 2025 and 2026 Reports for the total pipeline, funded and unfunded works, and the split between public and private funding, shows the general growth in the time periods and the stagnation in private sector funded works. The proportion of unfunded works that are publicly financed grew by over 33%, coupled with a $3.6b increase in private unfunded works. Conversely in the private sector, projects have not had as high a conversion into funded works, with only a 1% growth in the total value of funded work between the 2025 and 2026 pipelines, while unfunded works have increased by 15%. Contributing factors to this include the ongoing cost escalation and lengthy approvals timeframes impacting on project availability.

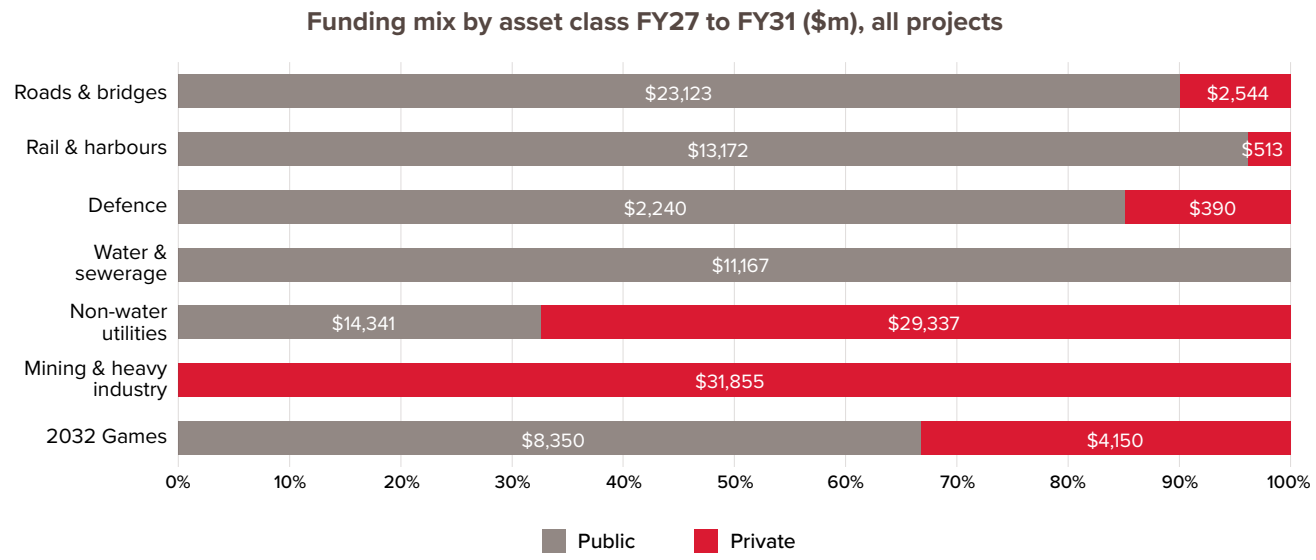
Public and private funding 2025 v 2026 QMPPR ($m)



Source: Queensland Economic Advocacy Solutions, QMCA analysis



The public sector continues to demonstrate substantial strength, accounting for 51% of the total pipeline but representing an overwhelming 67% of all funded work ($54.9b). Public projects enjoy a high level of funding certainty, with 78% of the public pipeline fully committed. However, public unfunded work also jumped by +33% (+$3.9b), indicating a growing list of uncommitted public proposals that are accumulating in the planning stages.

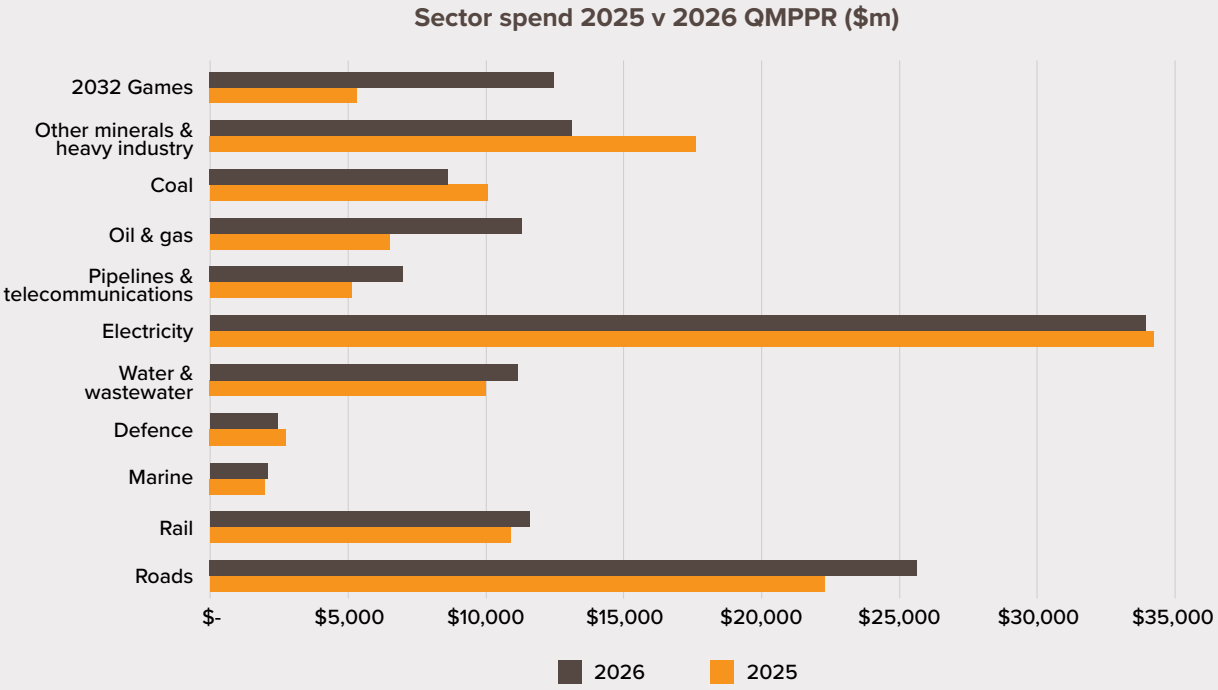


Source: Queensland Economic Advocacy Solutions, QMCA analysis

Conversely, the private sector is facing headwinds with project progression. While the private sector accounts for 49% of the pipeline, it remains heavily constrained and represents 72% of all unfunded work ($40.9b). Nearly 60% of all private sector proposals are currently unfunded. Furthermore, private funded activity was essentially stagnant between the 2025 and 2026 pipelines, growing by just +1% (+$287m) from 2025. This highlights some of the challenges that the private sector is attempting to manage when making investment decisions: cost escalation risks, global economic conditions around commodity markets (such as fuel), labour and supply chain constraints with a significant public sector pipeline of works underway, and in some areas a reliance on public enabling infrastructure.

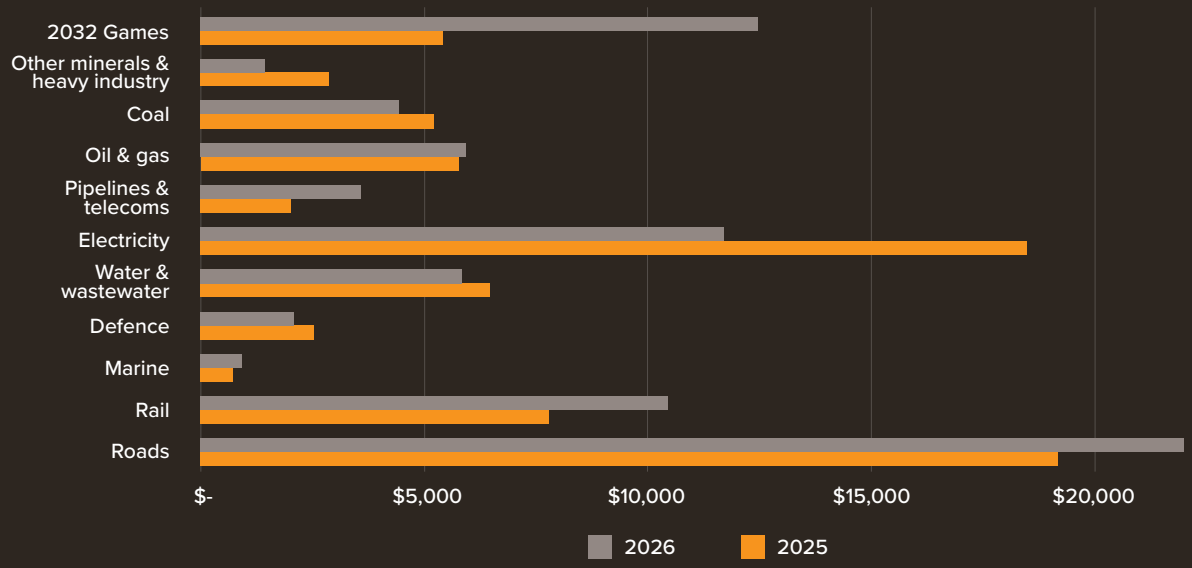
Sector and regional spend

The five-year projection of the total spend across the sectors in the state illustrates the areas of investment focus over the next five-plus years with electricity and roads being the two dominant sectors. Of the funded works, transport (roads and rail) and the Games infrastructure dominate the spend. The reduction in the electricity sector in the funded works is not correspondingly reflected in the total spend, which has held relatively steady. This reflects the readjustment of timing and focus of investment in this sector associated with the Queensland Government's Queensland Energy Roadmap.



Source: Queensland Economic Advocacy Solutions, QMCA analysis

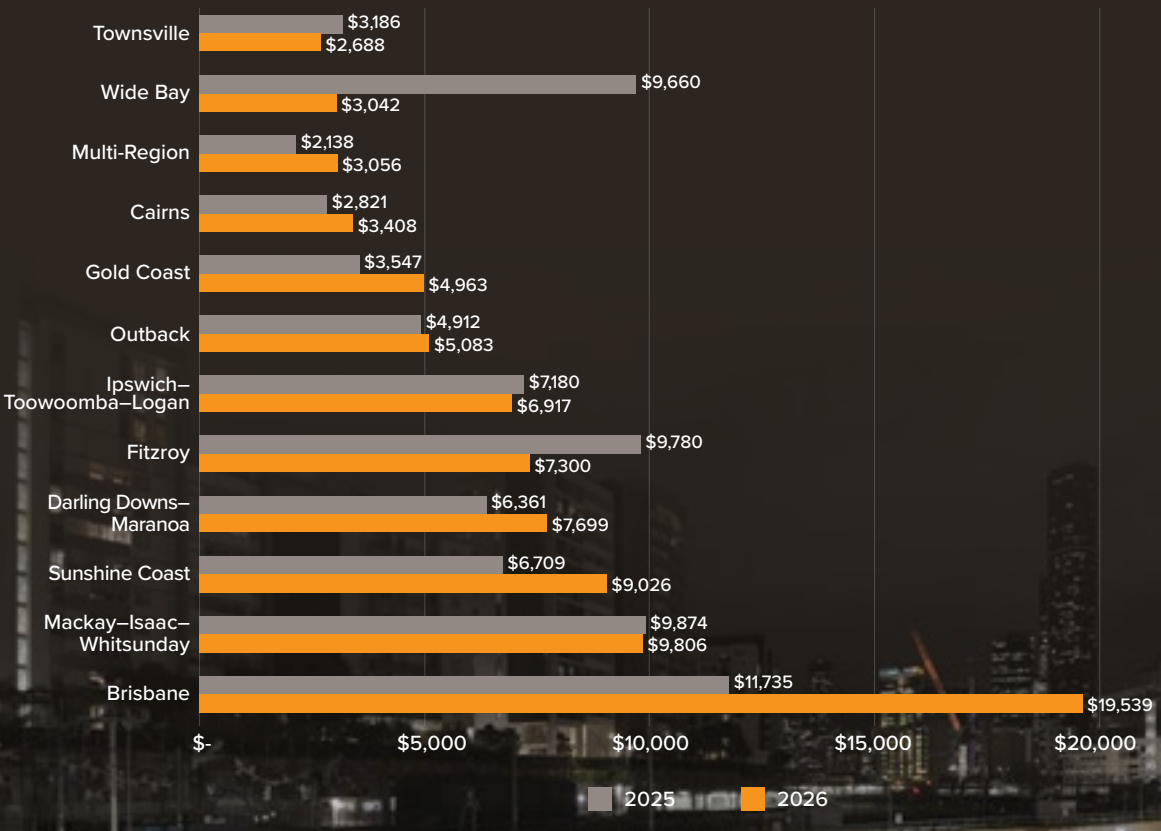
Funded works by sector 2025 v 2026 QMPPR ($m)



Source: Queensland Economic Advocacy Solutions, QMCA analysis

The funded outlook by region shows the significant investment in the greater Brisbane area, mainly associated with the Games spend and other key infrastructure. Some regions such as Wide Bay and Fitzroy have seen a reduction in the identified funded works over the forward five years due to some key projects being readjusted in terms of timing, scope and funding certainty.

Regional breakdown of funded work 2025 v 2026 QMPPR ($m)



Source: Queensland Economic Advocacy Solutions, QMCA analysis

Key Findings

Sharp increase in unfunded projects

A clear delivery bottleneck defines the current major projects landscape, as shown by the slow growth in funded projects of just 6% compared to the rapid 15% rise in unfunded proposals. This trend indicates that projects are struggling to transition from the credibly proposed stage into active, funded works.

Stagnating funded private construction

Funded private construction has essentially flatlined, growing by a negligible 1%, or +$287m, from 2025. This stagnation points to headwinds for private developers, including cost escalation and slow regulatory approvals, impacting on investor confidence.

Delayed starts on funded work

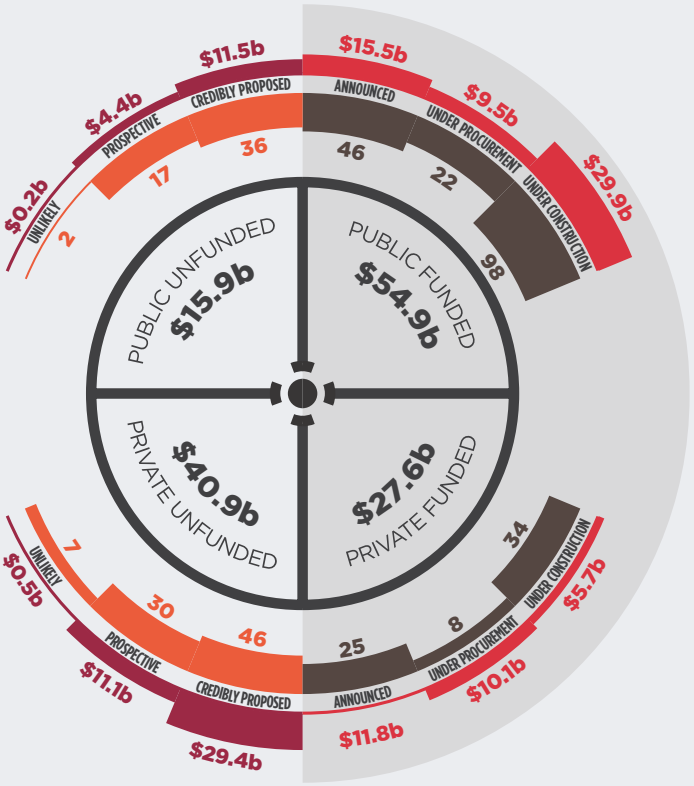
Approved funded work is increasingly being pushed out into later years, while unfunded proposals stack up due to planning delays, complex procurement policies and lengthy approvals processes. Peak activity of funded work has shifted to FY29 and is projected to surge to $20.6b, a 32% increase on previous projections.

Overall cost challenges

With critical deadlines associated with much of the $82.5b of funded work in this pipeline, there is pressure on Queensland's civil construction resources and project budgets. Delays to major project commencements have seen an increase in competition for available work, which has offset some of the pressure on delivery costs over the last 12 months. However, these conditions will not last as a significant number of the major projects are currently in varying stages of procurement with works commencing from 2027. The pressure on the labour market, supply chain and logistics channels will increase pressure on costs unless capacity and productivity can be lifted ahead of – and faster than – the commencement of the works.

For 2026, RLB is currently forecasting construction escalation of 5% in Brisbane, 5.5% on the Gold Coast and 7% in Townsville, however this will increase across the state in the forthcoming years to ~7%.

Pipeline summary



Source: Queensland Economic Advocacy Solutions, QMCA analysis

Productivity

There have been some increases in productivity (~10%) over the last 12–18 months that have seen the five-year rolling average rise to over $1m/person across all engineering construction works. And while efforts to lift overall productivity continue, it remains well below the 2011–2016 peak.

Annual 10% productivity lifts, combined with modest, sustained workforce growth in line with recent Queensland trends (annual rate of 2.5%), would reduce the peak labour demand by over 35%, allow the funded program to be delivered within manageable workforce levels, better align industry output with the pipeline, and reduce delivery risk.

Key areas where initiatives can lead to higher delivery efficiency include removing and reforming high levels of prescriptive delivery arrangements and resource duplication, industrial relations management, collaborative procurement approaches, workforce structure and planning, and adoption of new and improved technology and innovation. These areas can add significantly to improving overall productivity in excess of 10%.

Labour

Delivering all the works in this pipeline is estimated to require an average of 21,400 workers in FY27 rising to a peak of over 39,000 through FY29 and FY30. There are currently approximately 12,500 to 14,000 workers delivering the major engineering construction works. Australian Bureau of Statistics data has identified that 32,400 people are currently employed across all works in the engineering construction sector. With consistent improvements in productivity across the industry and annual workforce growth exceeding 2.5%, these workforce projections will decrease and become more achievable.

Key Statistics

The 2026 Report comprises 371 projects with a combined value of $139.5b and represents an increase from the 2025 pipeline of $127.5b across 306 projects.

While the total pipeline value grew by $11.9b (a 9% increase) and project count rose by 65 (a 21% increase), the average project value fell from $417m in 2025 to $376m in 2026.

The funded pipeline, representing active and committed work, is valued at $82.5b. This constitutes 59% of the total pipeline value across 233 projects (166 public and 67 private). While representing year-on-year growth of $4.4b, or 6%, from the $78.1b in 2025, the average funded project value stands at $354m.

The unfunded pipeline of proposed and uncommitted work has increased more proportionally than the funded works to $56.9b. This represents 41% of the entire pipeline across 138 projects, including 55 public and 83 private proposals. This uncommitted portion surged year-on-year by $7.6b (a 15% increase) from $49.4b in 2025, with an average unfunded project value of $413m. This contrast confirms that headline growth is 'inflated' by uncommitted projects, as unfunded activity grew nearly three times faster than funded commitments.

The public sector accounts for $70.9b, representing 51% of the total pipeline. This is split between $54.9b in funded commitments and $15.9b in unfunded proposals, spanning 221 projects (166 funded and 55 unfunded). Public projects enjoy high funding certainty, with 78% of the public pipeline fully committed. However, public unfunded work also jumped by 33% (an increase of $3.9b), indicating a growing list of uncommitted public proposals and also a longer pipeline that is important beyond 2032.

The private sector accounts for $68.6b, or 49% of the total pipeline. This is divided into $27.6b in funded commitments and $40.9b in unfunded proposals, spanning 150 projects (67 funded and 83 unfunded). Nearly 60% of these private proposals are unfunded, representing 72% of all unfunded work. Furthermore, private funded activity stagnated, growing by just 1% ($287m) from 2025, highlighting private sector client hesitation associated with global economic conditions, cost risks, labour and supply chain concerns, and a reliance on public enabling infrastructure before making final investment decisions.

Within the $82.5b funded pipeline, active construction represents the largest component, valued at $35.7b across 132 projects (98 public and 34 private). While this high volume of active construction is a positive economic indicator, it places immediate and immense pressure on labour and material supply chains.

Projects under procurement are valued at $19.6b across 30 projects. Public procurement dominates this stage at $9.5b, while privately financed projects in procurement account for another $10.1b across only 8 projects, indicating that very few major private projects are close to commencing.

Announced projects make up the remaining funded queue, valued at $27.2b across 71 projects, split between $15.4b in public works (46 projects) and $11.8b in private works (25 projects).

Among the $56.9b unfunded pipeline, the credibly proposed is valued at $40.9b across 82 projects. This category represents 72% of the entire unfunded pipeline and reflects longer-term confidence in the Queensland market in developing projects early for consideration in the medium to longer term. These are projects under detailed investigation including business cases, but are lacking committed funds at this point. The private sector holds the lion's share at $29.4b (46 projects) compared to the public sector's $11.5b (36 projects).

Prospective projects, representing developments likely to occur in the medium term but not yet formally proposed, are valued at $15.5b across 47 projects, with the private sector accounting for $11.1b (30 projects) and the public sector making up $4.4b (17 projects).



Key Risks and Opportunities

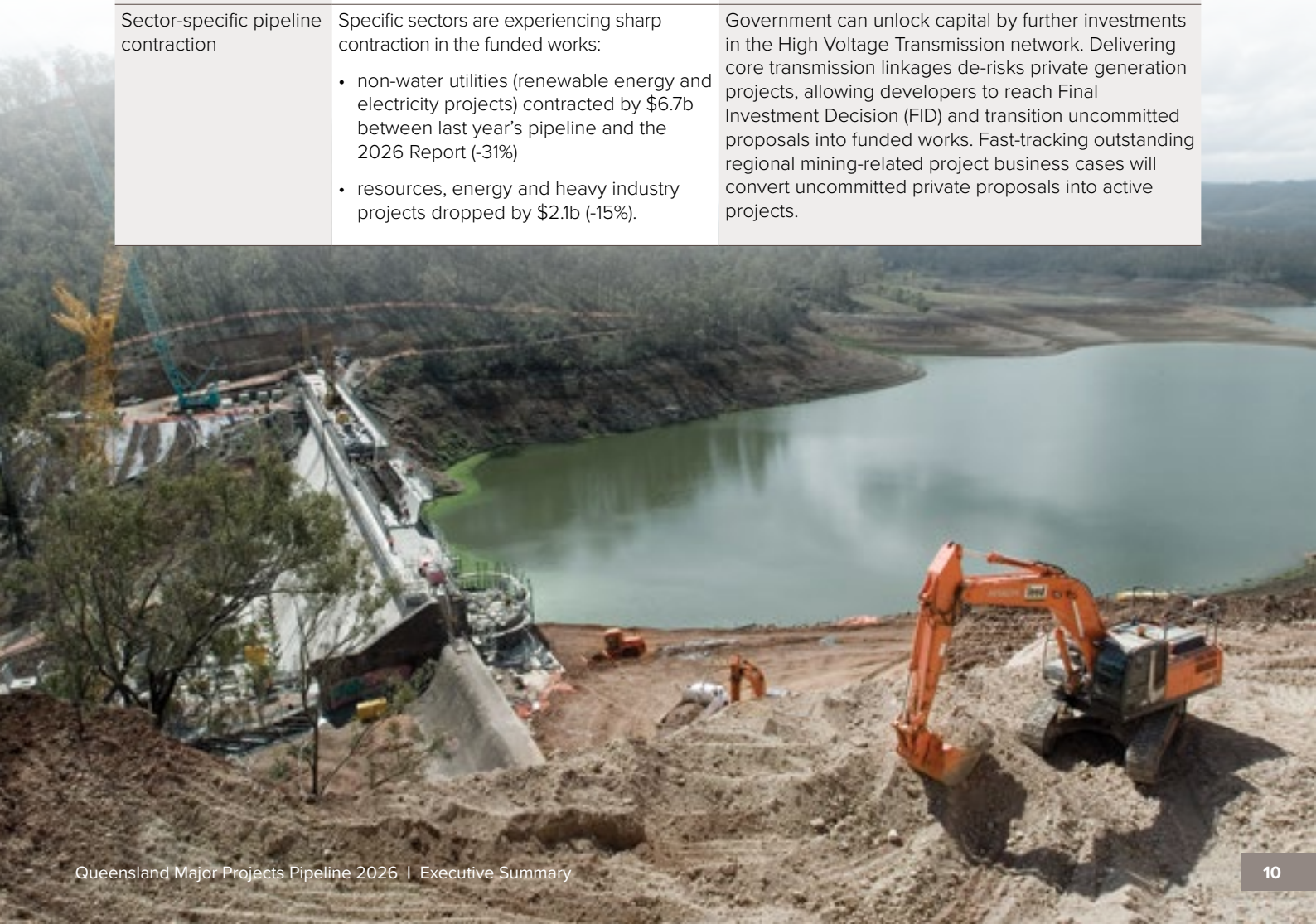
With this unprecedented level of committed investment and projected pipeline of work over the next decade, the outlook for the construction sector in Queensland is obviously buoyant. Emerging concerns about real world industry capacity, stable and predictable supply and demand markets, and the speed at which fundamental changes are made to eliminate waste and drive productivity, are critical to delivering the pipeline.

While the delivery of this work is not without its macro-level risks, there are many opportunities for industry, government, stakeholders and the private sector to work together to ensure the successful delivery of the program of works.

These key risks and opportunities are broadly summarised below.

Category	Risk	Opportunity
Approvals	Project approvals (environmental and commencement) have increased significantly over the last decade. For time-critical infrastructure, approval delays and commencements impact on the rate at which the works must be delivered.	Recent work by the Queensland Productivity Commission (QPC) identified the impacts that approvals are having on productivity. To address this will require the State Government and industry to continue to find ways to streamline the Environment Protection and Biodiversity Conservation (EPBC) approvals pathways and timing with the Commonwealth Government, as well as streamlining other state and local government approval processes.
Financing	The publicly funded component of the pipeline continues to grow. While this represents economic infrastructure investment, other pressures such as the cost of financing due to credit ratings will limit the extent of available public funding. Public dollars can only go so far.	Government and industry to work together to actively facilitate greater private sector investment through: • co-investment • private sector financing through Public Private Partnerships (PPPs) and other similar commercial models where it makes commercial sense • lease back • asset recycling.
Procurement	Public procurement processes and associated timeframes have become more complicated and lengthy. The 2026 Queensland Procurement Policy has provided a framework to streamline these processes and enable greater collaborative procurement.	Collaborative procurement to become the norm, enabling greater time and cost certainty for clients and, critically, ensuring that project risks can be properly understood, managed and de-risked as much as possible.
Costs	Cost escalation in the industry is estimated to run at or above 7% annually over the next five years. With overall productivity across the entire project lifecycle having dropped 9% since 2018 (according to the QPC), project budgets are under strain from rising supply chain costs due to supply and demand, increased labour costs and a reduction in overall productivity.	Clients across the board will need to account for actual cost increases in their budget planning. When engaged early, contractors can develop solutions to manage cost increases through different approaches to supply chain and delivery. Remove costs from inefficient resource allocation, particularly on the client side through double marking and excessive oversight, that add significantly to overall project cost.
Industry capacity	Industry capacity to deliver a pipeline of work of this size is subject to: • labour supply • supply chain capacity and capability • productivity across the project lifecycle. Industry capacity will need to lift from the current level of $11b in 2025/26 to an average of $16.1b/year over the next five years to deliver all the funded work (peak of $20.6b expected in FY29). To deliver the total pipeline, this figure is up to $27.9b/year.	Lifting productivity through a range of mechanisms such as technology across the board, industrial relations and procurement will have an impact on labour needs. So too will lifting labour capacity through greater diversity, higher retention, interstate and focused international skilled migration. Equally improving the efficiency of project development and management on the asset owner side will deliver gains in work delivered through better utilisation of resources. Supply chain capacity across the industry will also need to lift. This can be achieved through early engagement with key elements of the supply chain (such as steel, aggregates and concrete) to pre-invest in capacity uplift. Government incentives or co-investment might be required to assist in this too.

Category	Risk	Opportunity
Workforce accommodation	Accommodation in many parts of Queensland is under pressure with the additional need to accommodate the construction workforce, many of whom may come from interstate, overseas or other parts of the state. While investments are being made to increase supply as practicably as possible, the supply of housing remains a constraint on the ability to permanently attract and retain workers in Queensland.	While solutions are underway to address these housing shortages through initiatives such as the Residential Activation Fund and other mechanisms, a shortage in short- to medium-term accommodation exists. Other accommodation solutions need to be considered, including building workers' accommodation villages in SEQ and key locations in the state which could then be used post-construction for Games accommodation.
Geographic disparities: SEQ overheating	Of the funded works in the pipeline, 50% of the works are based in South East Queensland (SEQ). This concentration does increase the risk of localised market overheating, labour poaching and project-inflation. Conversely, some regional areas are seeing a reduction in the pipeline with Fitzroy falling by 25% (-$2.5b) and Wide Bay by 68% (-$6.6b). These two regions are the most significantly affected, primarily as a result of a readjustment of the timing of major projects in those regions.	Regional stability can be restored by actively converting outstanding regional business cases (such as bulk water and industrial energy proposals) into funded commitments with a focus on works commencing post 2030. Smoothing procurement sequencing across regions will prevent localised market failure while relieving pressure on SEQ supply chains. Equally, development of regional supply chain capacity (quarry and other resources) in these areas to support the construction in other regions should also be considered.
2032 Games legacy and post-2032	As the Brisbane 2032 Olympic and Paralympic Games capital program ramps up towards peak delivery in FY30 (~$4b), construction resource competition will peak, creating a risk of a sharp post-2032 activity cliff if outer-year project pipelines are not managed proactively.	Actively preparing to convert unfunded private sector proposals into active funded commitments during the late 2020s will ensure a seamless economic handover and prevent a post-Games construction downturn.
Sector-specific pipeline contraction	Specific sectors are experiencing sharp contraction in the funded works: • non-water utilities (renewable energy and electricity projects) contracted by $6.7b between last year's pipeline and the 2026 Report (-31%) • resources, energy and heavy industry projects dropped by $2.1b (-15%).	Government can unlock capital by further investments in the High Voltage Transmission network. Delivering core transmission linkages de-risks private generation projects, allowing developers to reach Final Investment Decision (FID) and transition uncommitted proposals into funded works. Fast-tracking outstanding regional mining-related project business cases will convert uncommitted private proposals into active projects.



Cost Issues

Construction input costs rising, but impact limited – for now

The re-escalation of the current Middle East conflict has pushed up prices of key construction inputs, notably diesel, freight, energy-intensive materials such as concrete, plus technology components. Higher diesel prices have flowed into plant, road freight, concrete deliveries, earthworks and regional logistics costs. Concrete suppliers have rapidly adjusted production and transport charges in response to diesel prices. Other oil-derived and freight-sensitive inputs such as bitumen, have also come under renewed pressure.

However, rising input costs are not translating uniformly into higher tender prices. South East Queensland is experiencing a temporary soft spot as delays to major projects increase competition for available work. Contractors with projects nearing completion are showing greater appetite for well-documented, lower-risk opportunities.

Conditions remain tighter for larger and more complex projects. Tier 1 contractor and specialist subcontractor capacity is constrained, while high construction and financing costs continue to affect the feasibility of proposed projects. The result is a two-speed market: competitive tendering for some smaller, lower-risk projects, alongside continued cost pressure and selective bidding for major projects.

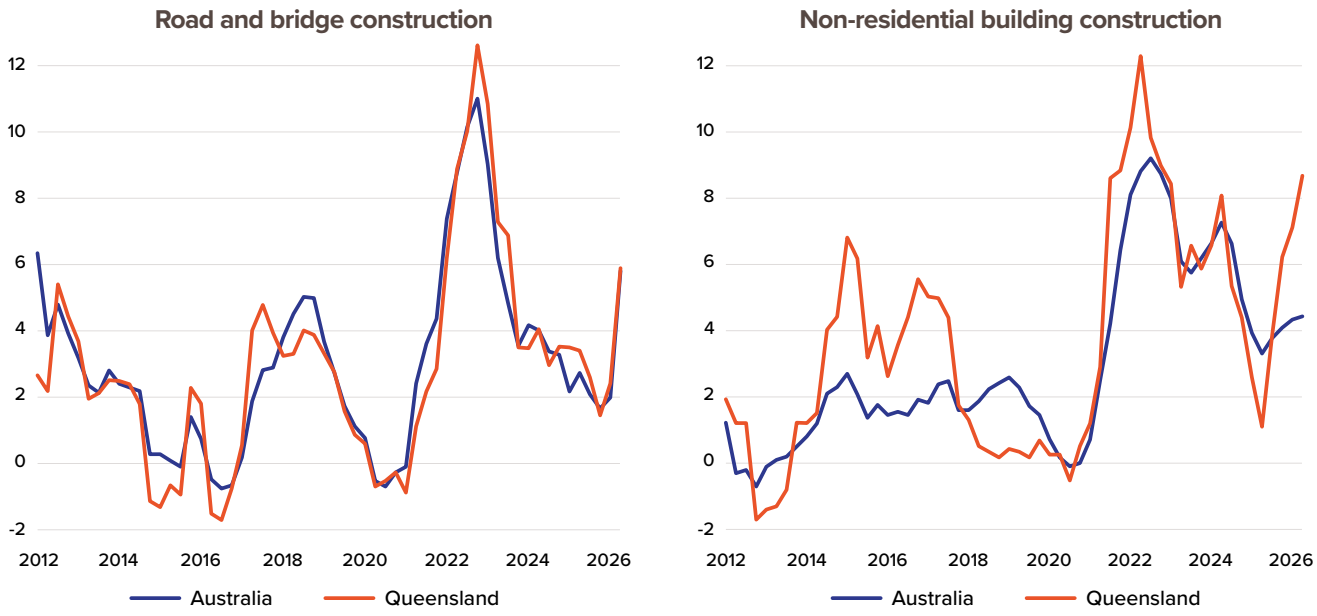
Australian Bureau of Statistics Producer Price Index data show that construction costs have risen in Queensland, driven by the global conditions and elevated levels of activity for major projects, especially in some regional areas. For example, growth in Queensland's road and bridge construction costs accelerated to 5.9%, slightly faster than the national rate. Non-residential building costs, which are interrelated with infrastructure, increased by almost 8.7% in Queensland over the year to June 2026, compared with 4.4% nationally.

RLB forecasts construction escalation of 5% in Brisbane, 5.5% on the Gold Coast and 7% in Townsville in 2026. However, the ongoing Middle East conflict presents additional risks in the near-term, particularly for fuel, freight and imported materials.





Construction output costs, Queensland and Australia, ABS Producer Price Index, annual % change



Source: Australian Bureau of Statistics

Current competitive window unlikely to continue

The current competitive window is unlikely to persist. Queensland's major infrastructure, hospital, housing and 2032 Games programs are expected to lift demand for contractors, subcontractors and skilled labour from late 2026 and into 2027. RLB forecasts annual construction escalation of 7% in Brisbane, the Gold Coast and North Queensland from 2027 to 2029, although there will be variances between regions and sectors. This is well above the typical rate of around 3.5% recorded before the pandemic.

Skilled labour availability is likely to be a major driver of higher escalation as the project pipeline moves into delivery. Tier 2 and tier 3 contractors may be drawn towards projects within larger programs, reducing competition across the broader market. Wage pressure will be compounded by weak construction productivity, although there are signs of improvement. Contractor insolvencies and limited tier 1 competition could also increase costs and extend delivery periods.

Early procurement planning, realistic escalation allowances and careful project packaging will become increasingly important as Queensland's pipeline accelerates.

Industry Capacity and Capability

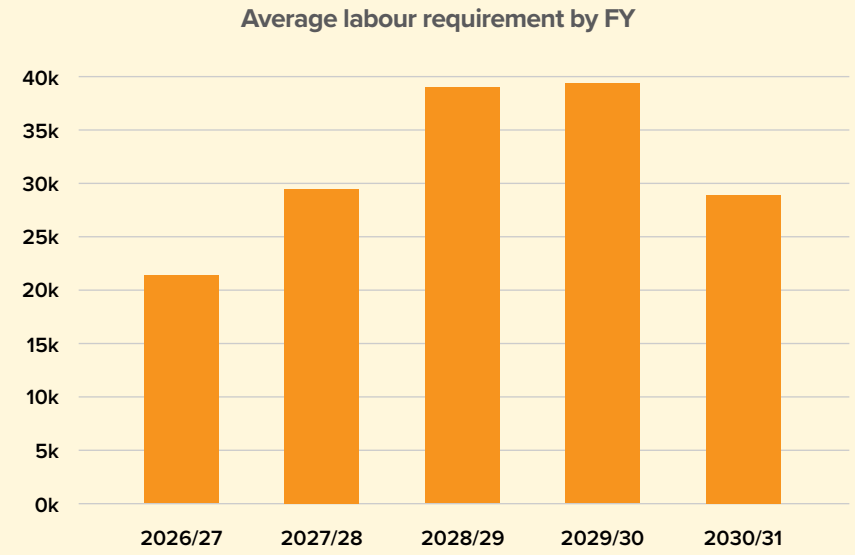
About CSQ

Construction Skills Queensland (CSQ) is an independent, not-for-profit, industry-funded body that supports employers, workers, apprentices, trainees and career seekers in the building and construction industry. CSQ has contributed two sections of this report: Industry Capacity and Capability; and the Labour and Skills Report.



Queensland is experiencing a significant period of infrastructure delivery, underpinned by a strong and diverse pipeline of projects across the state. The scale and geographic spread of this generational investment present substantial opportunities, while also increasing competition for construction workers across projects, regions and occupations.

Delivering the project pipeline covered in this report is estimated to require an average of approximately 21,400 construction workers in 2026/27. Average labour demand is projected to increase to around 39,000 workers in 2028/29 and peak at approximately 39,400 in 2029/30, an increase of 84% from 2026/27.



Source: CSQ for QMCA

The project pipeline is expected to drive demand across a broad range of occupations. Some of these include earthmoving plant operators, concreters, electricians, labourers, civil engineering professionals and construction managers.

Greater certainty around future labour demand

Funded projects provide a relatively firm baseline of activity across the five-year period. In the first two years, most labour demand is also associated with projects already under construction or in procurement, providing greater certainty around near-term workforce requirements.

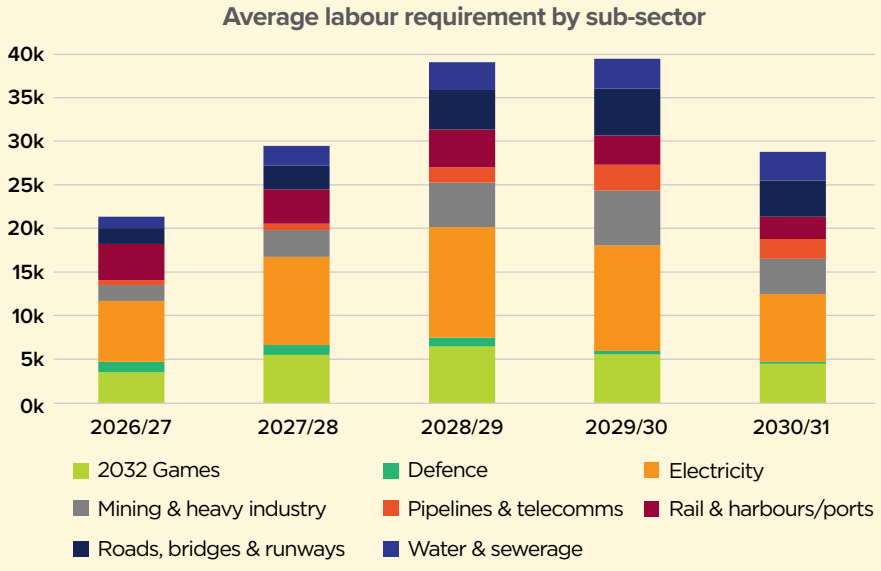
Funded projects are estimated to support between 50% and 75% of average labour demand from 2026/27 to 2030/31. Labour demand from this portfolio is expected to increase from approximately 16,000 workers in 2026/27 to a peak of around 24,800 in 2028/29. Unfunded projects account for the remaining 25% to 50% of demand and are projected to peak one year later, at around 19,300 workers in 2029/30.

By project status, projects under construction or in procurement are estimated to account for 67% of average labour demand in 2026/27, 55% in 2027/28 and 44% in 2028/29. Collectively, these advanced-stage projects are expected to require approximately 14,300 workers in 2026/27, rising to 16,200 in 2027/28 and peaking at around 17,200 in 2028/29.

Electricity infrastructure continues to drive workforce demand

Electricity projects consistently account for the largest share of average labour demand over the five-year period, reflecting sustained investment in energy infrastructure. These projects are estimated to represent between 27% and 34% of average labour demand. Average workforce requirements are estimated to increase from approximately 7,000 workers in 2026/27 to a peak of around 12,700 in 2028/29, an increase of approximately 82%.

Transport projects account for the second-largest share of labour demand, supported by investment in roads, bridges and runways, as well as rail, harbour and port infrastructure. These projects are estimated to require an average of approximately 5,900 workers in 2026/27, representing 28% of demand, with their share remaining above 20% in subsequent years.



Source: CSQ for QMCA

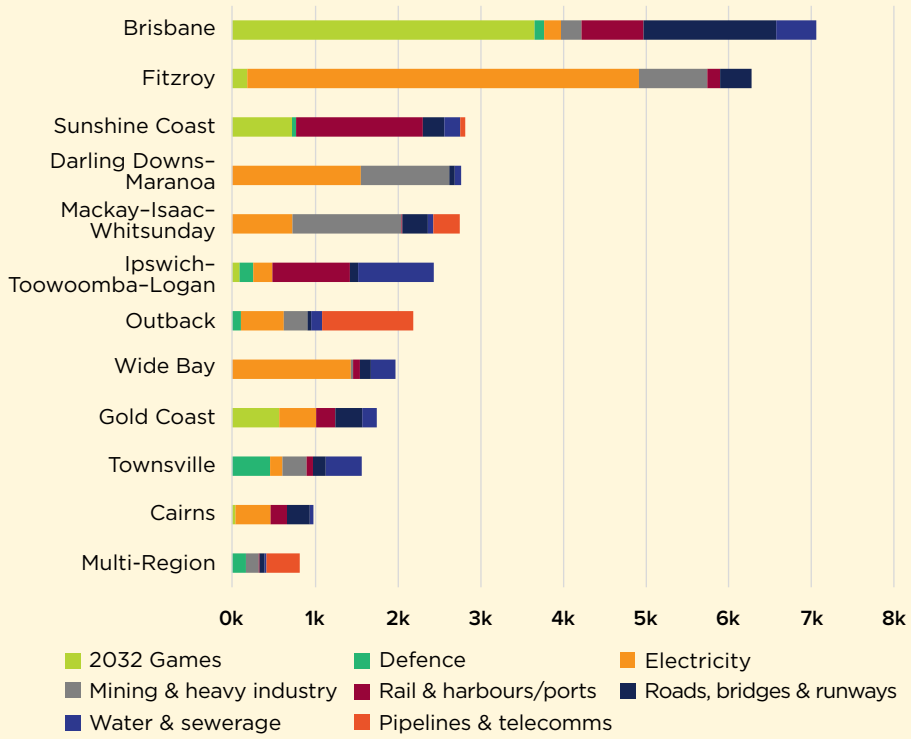
The 2032 Games and mining and heavy industry projects are also significant drivers of workforce demand. Games-related projects are estimated to account for between 14% and 19% of average labour demand over the five-year period, while mining and heavy industry projects account for between 9% and 16%.

Brisbane takes the lead in labour demand

Brisbane accounts for the largest share of average labour demand over the five-year period, estimated at approximately 7,000 workers. Funded projects support 81% of this demand, reflecting the concentration of the 2032 Games and major transport projects across the metropolitan area. Games-related projects account for 52% of Brisbane's average labour requirement, followed by roads, bridges and runways at 23%, and rail, harbour and port projects at 11%.

Outside Brisbane, Fitzroy has the next-largest average labour requirement, estimated at approximately 6,200 workers over the five-year period. Unlike Brisbane, however, unfunded projects account for 76% of Fitzroy's demand. Electricity projects are the primary driver, representing 75% of the region's average labour requirement over the review period.

Labour requirement by region and sector, average (2026/27 – 2030/31)



Source: CSQ for QMCA

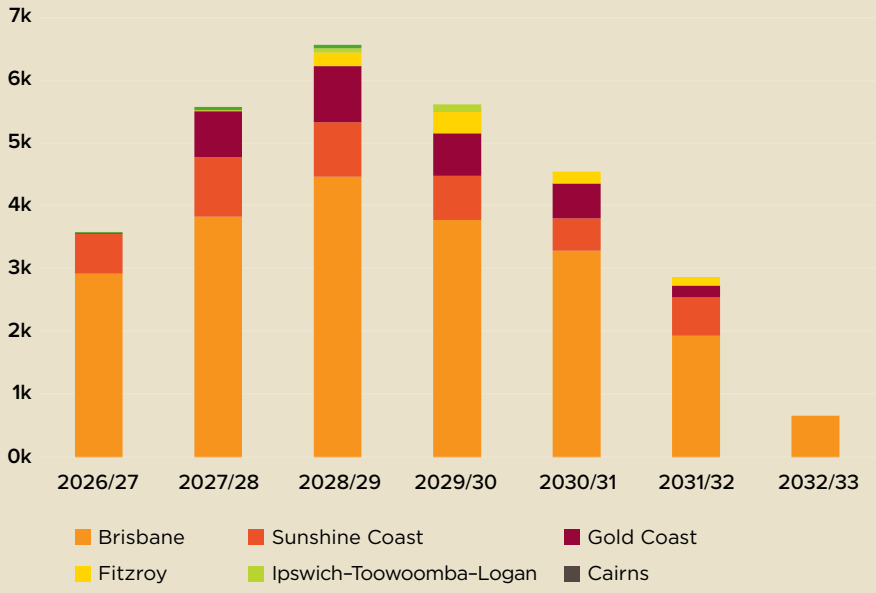
Games workforce demand to peak in 2028/29

The Games pipeline in this report includes a mix of competition venues, athlete villages and temporary infrastructure. Most construction activity is scheduled between 2027/28 and 2030/31 and is concentrated in South East Queensland.

Average workforce demand to deliver the Games pipeline is estimated to increase from approximately 3,600 construction workers in 2026/27 to a peak of around 6,600 in 2028/29.

Projects already under construction or in procurement underpin most near-term demand, providing greater certainty about workforce requirements. These advanced-stage projects are estimated to require around 2,600 workers in 2026/27, accounting for 73% of demand, and approximately 4,200 in 2027/28, representing 75%. At the 2028/29 peak, they are expected to require around 4,400 workers, or 66% of demand.

Average labour demand for 2032 Games pipeline by region and FY (2026/27 – 2032/33)



Source: CSQ for QMCA

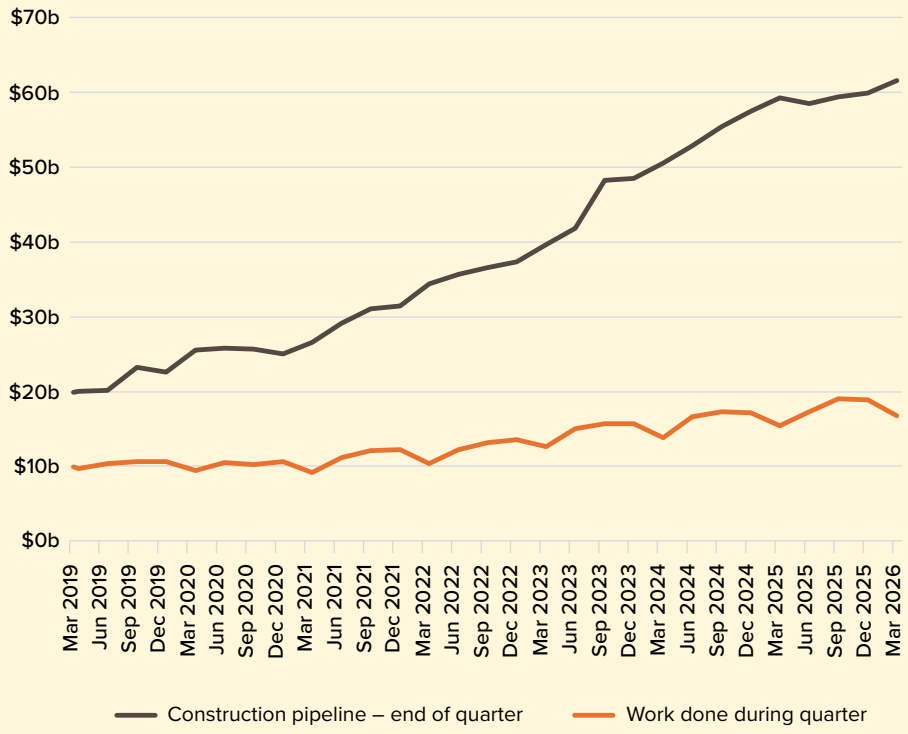
Games-related labour demand is concentrated in South East Queensland, particularly in Brisbane, where average labour demand is estimated to peak at around 4,500 workers in 2028/29. The Sunshine Coast follows, with demand peaking at approximately 900 workers in 2027/28, while the Gold Coast is expected to reach a similar peak in 2028/29.

Queensland's construction pipeline has more than doubled

The state has a substantial pipeline of construction activity to deliver. As of March 2026, the state's construction pipeline reached $61.8 billion, more than double the approximately $25.7 billion recorded in March 2020. The gap between the value of work in the pipeline and work done has now widened to around $45.3 billion, compared to $16.4 billion in the same period in 2020.

Of the current pipeline, approximately $41.1b, or 66% is building work, comprising $24.5b in residential projects and $16.6b in non-residential projects. Engineering accounts for the remaining $20.7b, of which around 72% is public-sector work and 28% private sector.

Construction pipeline versus work done (current $)



Source: Australian Bureau of Statistics

Increasing demand for construction workers

Queensland's strong construction pipeline is creating significant workforce opportunities. In February 2026, the state's construction industry employed approximately 285,785 workers, 24% more than in February 2021. Of these, around 32,400 were employed in the heavy and civil engineering subsector, an increase of 10% over the same period.

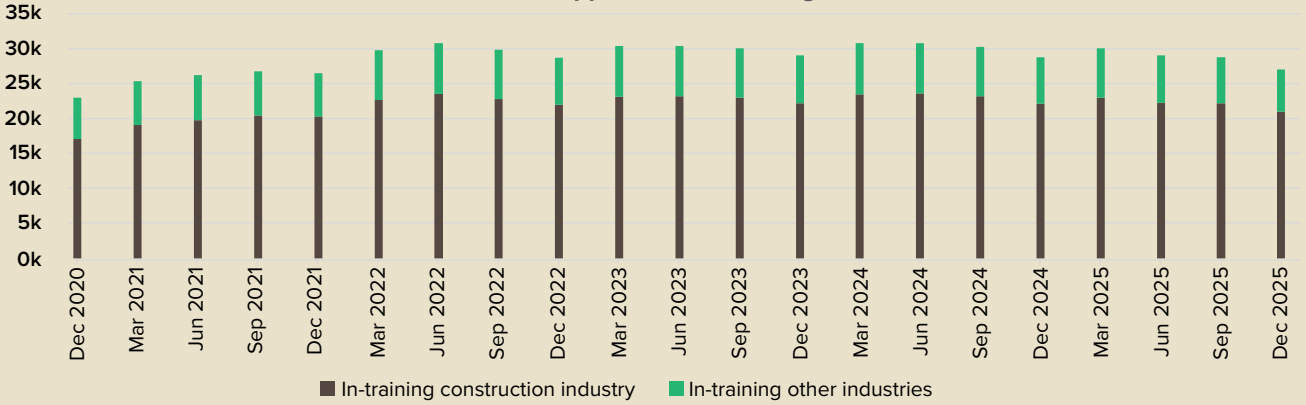
Demand is strong across several occupations essential to delivering engineering projects. In July 2026, online vacancies for selected trades and plant operator roles were approximately 108% higher than the pandemic low recorded in July 2020.

Expanding the talent pool to meet demand

Meeting Queensland's future construction needs will require continued investment in attracting new entrants and increasing participation among women and other underrepresented groups.

Apprenticeships continue to play a critical role in workforce development, with around 27,000 construction apprentices in training across Queensland as of December 2025, 18% more than in December 2020, including approximately 1,800 women and 1,950 Aboriginal and Torres Strait Islander apprentices.

Construction apprentices in-training, QLD



Source: National Centre for Vocational Education Research

Supply Chain Capacity and Capability

The capacity of materials supply is as fundamental to the successful delivery of the pipeline as is the capacity of the workforce. Two key inputs – steel and aggregates – are examined here as the two most in-demand materials required to deliver Queensland's major projects.

Steel supply

Australia produces about 4.4–6.1Mt of steel annually, split into two distinct segments:

- Primary steelmaking via a blast furnace at Port Kembla which produces ~4.4MTPA. The end uses includes roof sheets, welded beams and hollow sections
- Scrap-based electric arc furnaces with facilities in New South Wales and Victoria, producing 1.55–1.75MTPA with plans to increase this to close to 2MTPA. The end uses are predominantly reinforcing bar, mesh and wire products.

The annual national demand for steel is ~7.5Mt. In Queensland the consumption of steel was approximately 2.02Mt in 2024, of which ~982,000t was locally processed. The construction sector accounts for 1.6Mt of that total demand.

The recently released Queensland Construction Portal, developed by Brisbane Economic Development Agency (BEDA), has identified that for building and engineering construction works over $50m in value across the state, the demand in FY27 for structural steel is 463,000t and for reinforcing steel is 256,000t. This represents some 32% of the total demand for steel. Annual demand growth of ~10% is expected through the following building and engineering construction programs:

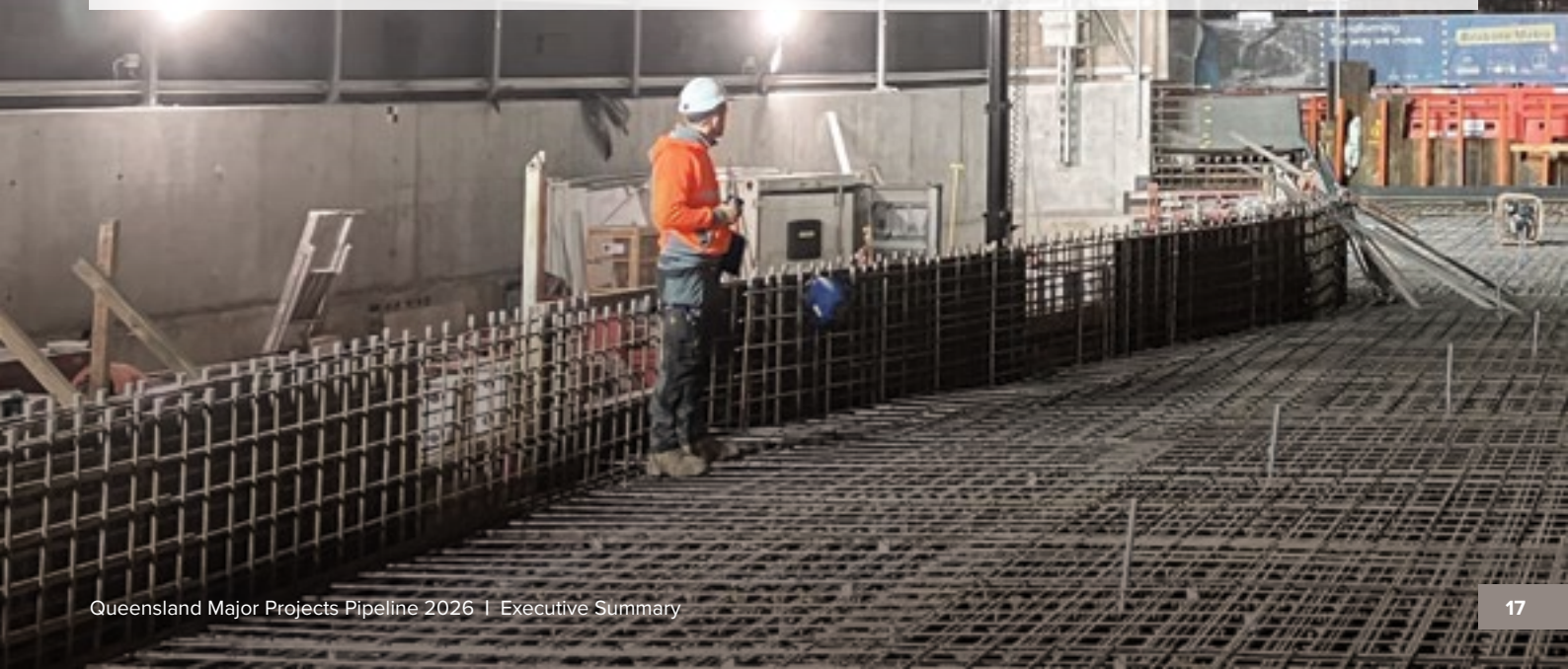
- Games Program and infrastructure: 160,000t through to 2032
- Housing program over the next decade: 30,000t
- Energy transition and electricity transmission: 2,000,000t through to 2040
- Other infrastructure, including bridges, schools and hospitals: 160,000t through to 2032.

Demand across the country for high-end steel for programs such as AUKUS, the 2032 Games and the ongoing energy transition will see raw steel production being stretched, especially with the ongoing challenges and uncertainty over the future of the Whyalla steelworks. The ever-increasing proportion of internationally sourced steel will continue to support this gap, but while in theory steel production can increase, the timeframes in which to do so and the investment required means lead times are long.

Three proposed greenfield steel facilities in Queensland have been identified:

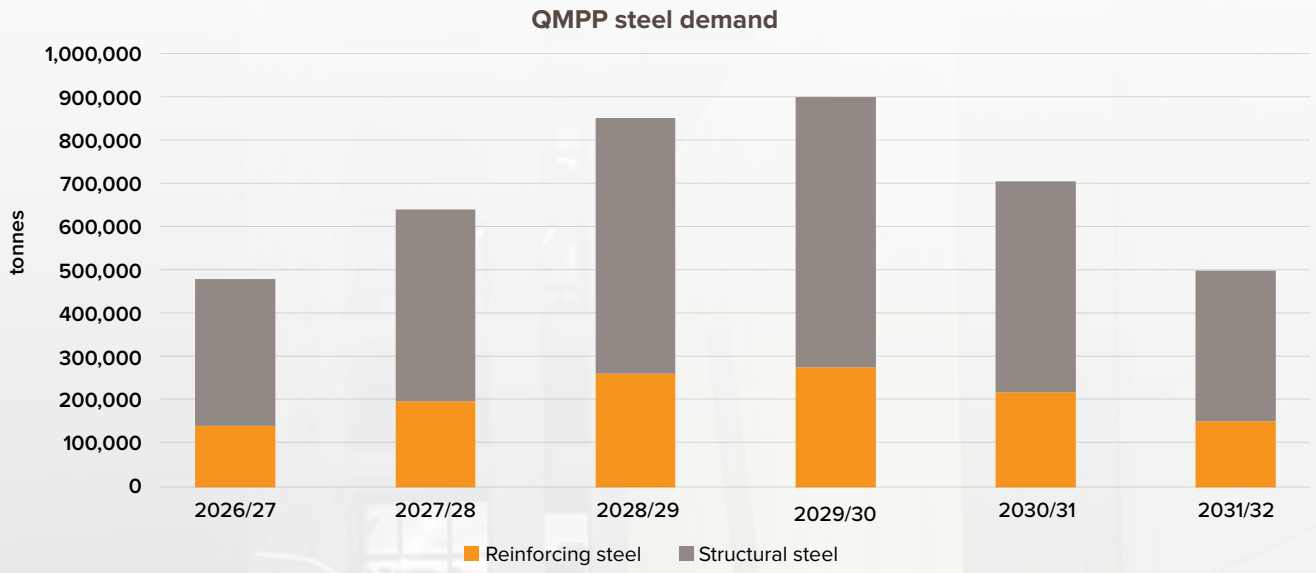
- Future Forgeworks facility at Swanbank (Ipswich)
- GM Steels facility at Wellcamp (Toowoomba)
- Alter Steels facility at Pinkenba (Brisbane).

Increasing the upstream steelmaking capacity will not address the supply chain challenge alone. Queensland's growing infrastructure program will require sufficient local distribution, processing and fabrication capability to convert the steel into project-ready requirements. Capacity and capability uplifts across both steel fabrication and reinforcing steel manufacturing are needed. There is a long lead time to bring these new facilities online and it is crucial that planning and environmental approvals are expedited to enable them to help meet the demand.

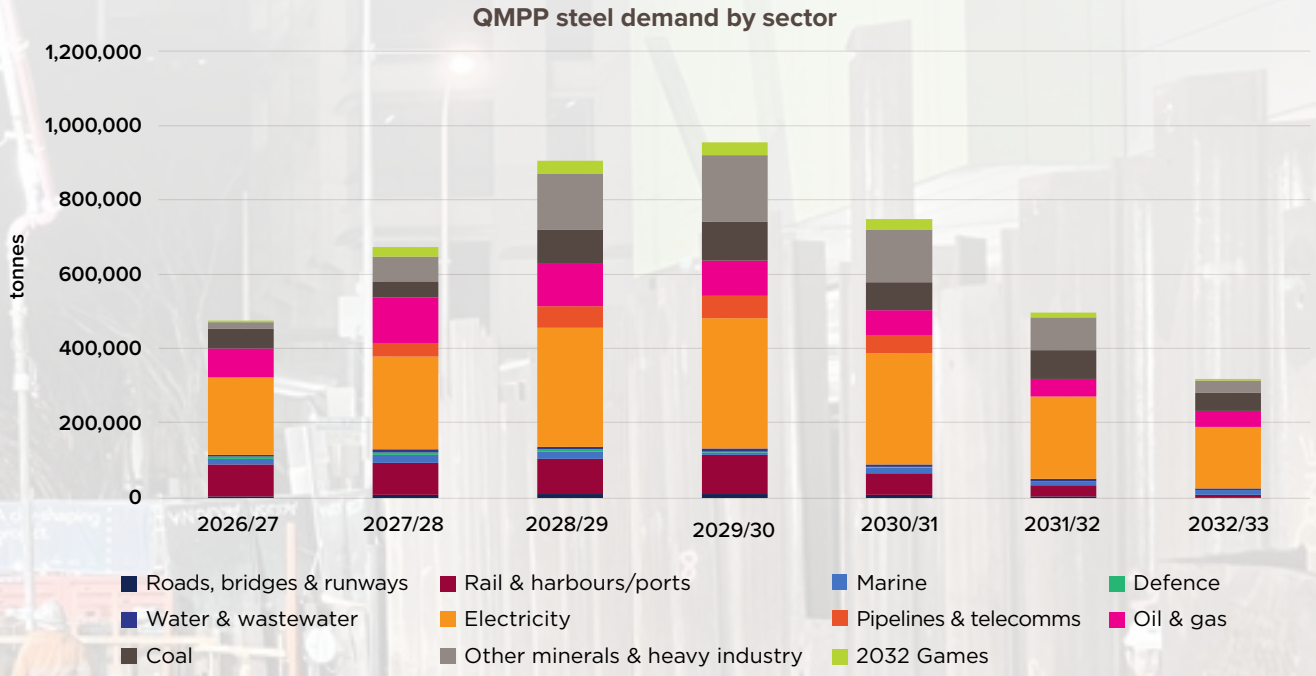


Steel fabrication capacity in Queensland ranges from 220–475,000t and from 285–640,000t in New South Wales. There are only seven fabricators across these two states with a fabrication capacity greater than 10,000t per year. The demand for fabricated steel in the construction industry is likely to exceed 500,000t, stretching local capacity well beyond current levels. Investment in the uplift of local fabrication capacity is imperative and must be undertaken early ahead of the significant lift in demand.

Some of these capacity uplifts are already underway, but further modernisation and increased output capacity of existing steel manufacturers are also needed. Incentives and co-investment from Commonwealth and State governments could be employed to fast-track capacity improvements, in partnership with existing local fabricators.



Source: BEDA, QMCA analysis



Source: BEDA, QMCA analysis



Aggregates and sand

Aggregates and sand are critical inputs to the infrastructure highlighted in this Report. Material sourced from quarries and sand sources are used in road pavements, asphalt, drainage and concrete. The existing sources of quarry material across the state and within South East Queensland have been under pressure for some time due to increasing demand, limitations on supply from various quarries and a diminishing supply base within many of these existing quarries.

The Cement and Concrete Association of Australia (CCAA) has identified that with the increase of work projected in South East Queensland alone the demand for hard rock and aggregate will increase to 28.3MTPA in 2028/29 from existing supply levels of around 21.5MTPA. Sand will equally undergo an increase in demand from 3.5MTPA currently to 5.4MTPA in 2028/29. This represents an additional requirement of almost 9MTPA of construction materials.

The challenge with current quarry material supply is that many of the current sources have existing permitting conditions that have the effect of restricting supply. These restrictions are a combination of legacy local and state government approval conditions which include allowable operating hours, maximum output levels and road restrictions. These conditions were made 10 to 15 years ago and do not reflect current operating environments. Additionally, urban encroachment within pre-established quarry areas has created further conflict, with governments attempting to minimise impacts on local communities – regardless of whether these communities pre-existed the quarry locations.

Up to now, demand and industry capability and capacity have effectively limited maximum utilisation of recycled material within the construction industry in Queensland. Lessons from other states have shown that recycled materials can displace the demand for virgin material in many uses (drainage, road base, asphalt and concrete) but such a change does rely on updates to current technical specifications.

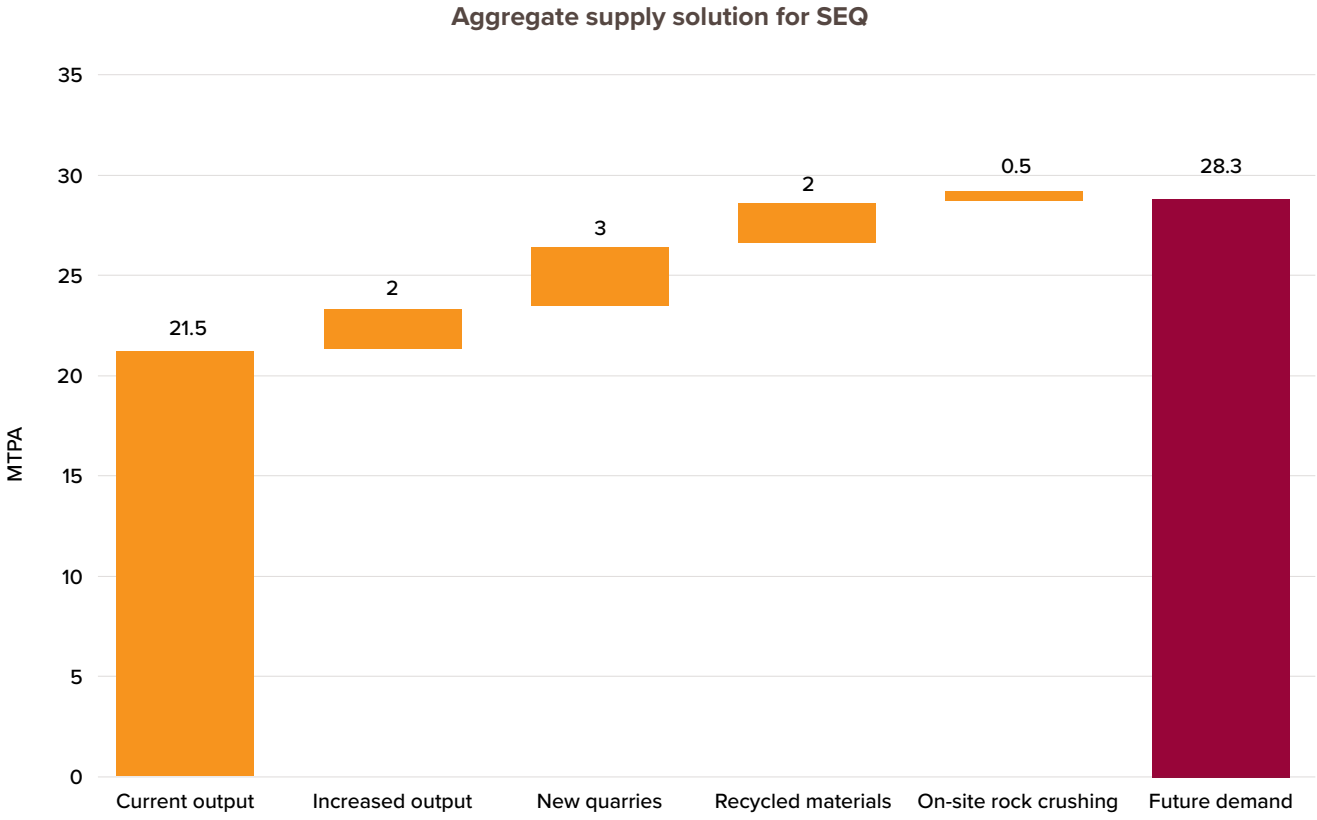
For example, since 2020 the Recycled First Policy in Victoria has required government construction projects to develop plans for the sourcing of specific recycled materials and government invested alongside and/or supported the development of such products. In the first four years of the policy, the uptake of recycled materials almost doubled on road projects. Metropolitan projects reported over 90% recycled crushed rock and asphalt base. Over that period, more than 3.6m tonnes of recycled content was diverted from landfill. The Queensland Government's new Waste Reduction and Recycling Plan provides a framework to enable greater recycling in the industry.

Solutions to the shortfall

Meeting Queensland's increase in demand will require a combination of existing quarry expansion, new quarry developments, recycled materials recovery, manufactured sand and project-based material recovery.

QMCA, along with industry representatives, has identified a series of solutions to address the 7MTPA shortfall in hard rock and aggregates for South East Queensland:

- **Increase output from existing quarry operations.** This represents the largest source of additional short-term capacity. Around 2 MTPA (25–30% of shortfall) in aggregate materials could be addressed by expanding quarry operating hours and volumes, upgrading plant and reviewing road haulage restrictions. This requires both state and local governments to adjust some permitting conditions at key sources to enable this. The timeframes for these changes are between 6 and 18 months.
- **Develop new quarries.** At least 2–3 new sources of supply (with base approvals) will need to be brought online to provide 2–3MTPA additional aggregate capacity (30–40% of the shortfall). New quarry supplies will take longer to fill the gap due to the time it takes to gain approvals, invest in and develop new sources. There are several new quarry sources that have been set aside and ready to invest in, available for development. It is critical that new material sources are fast-tracked within the approvals schemes and legislative arrangements too. The timing of this investment is around 2–3 years.
- **Recycle existing materials.** Material recycling (such as the recovery of demolition materials including crushed concrete) is already being used for road base and drainage applications; however the potential is not fully utilised, with 2–3MTPA currently being diverted to landfill. Increased use of recycled materials in lower-specification applications such as drainage backfill and N-class concrete allows higher-quality quarry materials to be reserved for applications requiring specific performance characteristics. Around 2MTPA (25–30% of the gap) could be recovered by increasing Queensland's sorting, processing and recovery capability. The industry has the capacity to handle and process this – but some specifications and waste codes will need to be updated to enable this to occur. The timing on this solution is within a 12-month period.
- **Enable on-site rock crushing.** This could provide 0.5–1MTPA additional quarried materials (10% of the shortfall) and is an immediate solution; however, it is entirely dependent on the project having suitable cuttings. It also depends on local material availability and the quality and quantity of materials.



Source: QMCA and Arup analysis

While there is adequate capacity to meet the 2MTPA of increased demand for sand in SEQ, timing and approvals for new extraction sources need to be addressed. To assist in helping meet short-term needs, further use of recycled materials and manufactured sand (byproducts from quarry operations) could assist in helping meet the demand.



Project Development and Delivery

The scale of the pipeline of construction works to be delivered in Queensland is historically as large as it has ever been. Project budgets and timeframes inevitably come under stress, and many of the types of projects in the QMPP have historically been subject to quite large average cost overruns (over the original budgets). There are many practical solutions to avoiding them, many of which are outlined in this Report and a little further on in this section.

The 2025 Report identified some $14.6b of work that was to be delivered in the 2026 financial year. Analysis of the pipeline delivery has shown that while industry output grew by 14% from the 2024/25 financial year to $11b, growth remains impacted by a range of delivery bottlenecks:

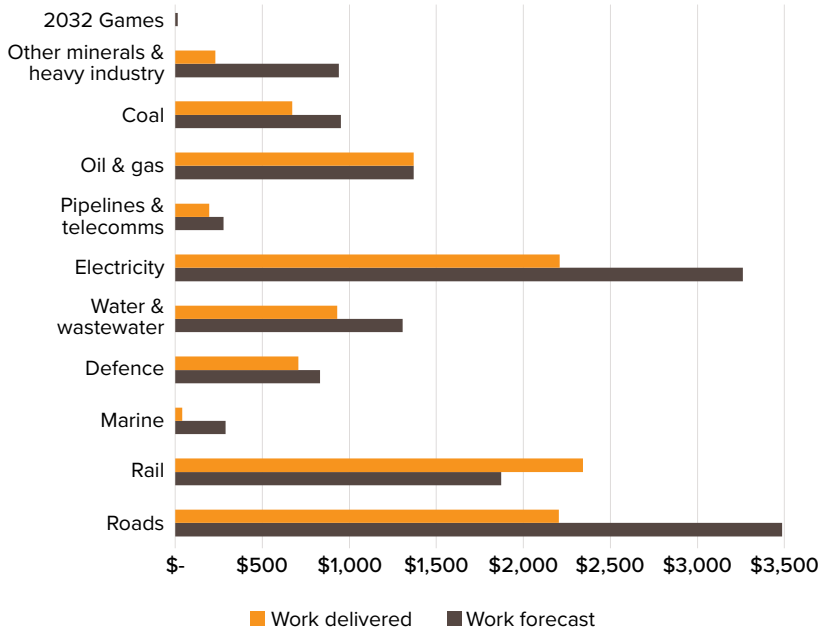
- **Procurement:** Complex public procurement frameworks and protracted tendering negotiations that have lengthened tender-to-award durations by up to 12 months, delaying project commencements
- **Approvals:** State and Commonwealth environmental approvals, including the Commonwealth Environment Protection and Biodiversity Conservation (EPBC) Act are continuing to face extended assessment cycles, holding major projects in pre-construction stages. The benefits of the proposed new arrangements between the state and federal governments are yet to be realised. The recent changes at state level are assisting, but it is limited to declared projects
- **Project status:** The progression of projects from the credibly proposed classification into funded works remains a challenge and ~ $41b (60%) of all private proposals remain unfunded. This is due to a range of factors including cost escalation risks, economic factors (global and local), workforce constraints and a reliance in some sectors on public enabling infrastructure
- **Productivity:** Civil construction lifecycle productivity has improved in the last 12 months but remains low historically. This reduces the physical turnover achieved per month on active job sites and extends overall build durations.

Left unchecked, these delivery bottlenecks will continue to extend the timeframes of projected work, affecting the capacity to deliver this important infrastructure amid enormous pressure associated with the 2032 Games.

The graph below illustrates the 2025 Report's expected spend for FY26 in each sector mapped against what was completed, as documented in this year's Report. Some of the highlights include:

- **Roads:** while the number of active projects underway in FY26 was larger than anticipated, the turnover was 37% less than projected
- **Rail:** significantly more expenditure was mapped, due to increases in scope and revaluation of work
- **Other minerals and heavy industry:** a 75% reduced level of delivery, due to slow project approvals and financial decisions
- **Electricity:** this sector saw a 17% decrease in the work delivered than what was forecast due to environmental, government and financial approvals.

Forecast v delivered work, 2025 v 2026 QMPPR ($m)



Source: Queensland Economic Advocacy Solutions, QMCA analysis

FY26 resulted in $3.5b less work delivered across 15 fewer projects than what was projected. This results in a net loss in economic activity for Queensland. The works being pushed into future years will result in further financial and industry delivery capacity issues, impacting the number of projects that can be delivered efficiently and effectively without crowding out other much-needed investments in housing, the 2032 Games and health.

The economic implications are significant with $966.3m in net economic activity lost and 4,523 jobs impacted. The Queensland Government itself is impacted with lost taxation revenue.

Estimated economic impacts for 2025/26

$3,533m
Major project delay value

4,523
Loss in jobs

$966.3m
Net loss in Queensland economic activity

$590.1m
Loss in wages

$208m
Loss in taxes

Modern methods of delivery

Current delivery approaches have on average resulted in projects being delivered over budget and over time. Without a change in approach the program will continue to be put under stress. Arguably one of the most critical ways to avoid cost overruns and extended timeframes is ensuring that the right parties are involved appropriately early in the project development phase so that defining 'how it will be built' is embedded into the planning and design – shaping how the project is designed.

This is where modern methods of delivery can play a key role. When applied systematically, it offers a credible, program-wide improvement in program and cost certainty, together with a material reduction in site labour demand and more efficient material requirements.

Applied systematically across the current pipeline:
a potential delivered cost saving of $4–$8b



Source: Laing O'Rourke and QMCA analysis

Collaborative procurement and delivery arrangements enable a programmatic view rather than a project-by-project one. These arrangements offer greater levels of standardisation and innovation to be considered in the project development phases and into delivery. Critical to this is engaging with and selecting preferred delivery partners (including critical supply chain solutions) early so that they can be embedded into the project planning and design. With this approach, practical delivery solutions can help shape the design rather than having the delivery adapted to suit a unique design solution.

For instance, on road projects requiring widening or realignment, design optimisation that draws on the residual life of existing pavement – rather than defaulting to full reconstruction – can reduce virgin material use, improve the speed of construction and open up stabilisation options.

Globally, the construction sector is making the shift away from bespoke, project-by-project delivery and towards more standardised, product-led delivery approaches across an entire program or sector. The UK Government's Construction Playbook requires public infrastructure to be procured on a platform basis using standardised, interoperable components. A far more standardised design is adopted with a focus on efficiency in construction across approaches, solutions and materials, delivering significant economies of scale. This standardised design approach also delivers greater efficiency and productivity through the planning and design phases.

Over the past 10+ years design costs as a proportion of overall project cost have risen from 5–10% to 10–15%. This (up to) 50% increase is attributed to more bespoke design, less standardisation, higher levels of specification and design approvals processes. If 25% of this increase could be captured through a more efficient process, the QMCA estimates that the potential benefit to the QMPP annually could be $350–$500m or a 1.3% to 1.9% productivity improvement.

Value for money and project outcome certainty is demonstrated through design measured in hours rather than weeks, lower embodied carbon, reduced whole-of-life maintenance and a lower delivery risk profile. This requires a shift where government and industry commit to program-level standardisation, giving the supply chain a genuine guarantee of pipeline certainty to invest in manufacturing capacity, workforce training and modern equipment.

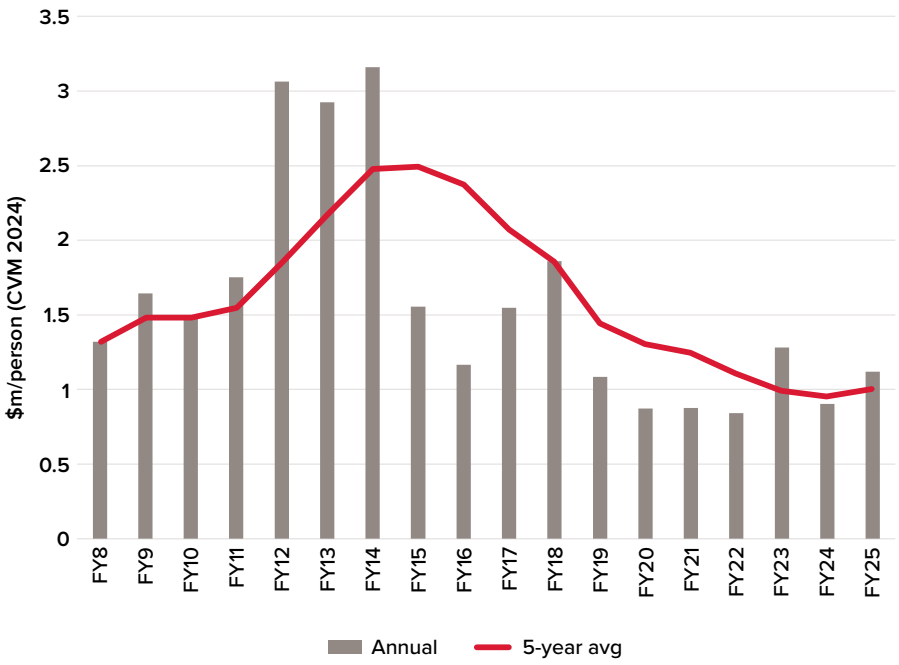


Productivity Update and Opportunities

Queensland construction productivity remains well below the 2011–2016 peak, but recent procurement reforms and an improvement in the industrial relations climate have driven a small rebound in engineering construction productivity between FY24 and FY25.

This has led to a corresponding increase in the output per person (as a measure of productivity) across the entire engineering construction industry to over $1m/person (five-year rolling average). The period through 2011–16 comprised predominantly privately funded projects; current works are mostly publicly funded. This disparity in productivity between privately and publicly funded projects establishes a benchmark for the future pipeline of works to meet the productivity levels required.

Engineering construction productivity ($m/person)



Source: QMCA analysis

Productivity in major engineering projects is 10–15% lower than the broader engineering construction sector (~$0.9m/person), due to:

- inflexible, legacy-style working conditions
- overly prescriptive project and technical specifications
- indirect costs averaging 35-45% of project costs, having increased from 15-25% levels over the last decade
- procurement time and cost roughly doubling in 5–10 years, eroding an estimated $250m in value annually
- disproportionate project risk being borne by the construction industry.

Despite major projects lagging overall engineering construction sector performance, there are positive signs, with initiatives underway across clients and industry, including:

- greater use of collaborative contracting to improve risk management and project certainty, albeit procurement processes and inputs continue to see a dilution of commercial terms and challenges in client embedment
- procurement reform to streamline processes, reduce costs and better de-risk delivery
- specifications updated to be more performance based
- improvements in industrial relations management and collaboration
- greater use of construction innovation and technology
- regulatory and administrative reform to eliminate unnecessary process, low-value reporting and layers of expensive non-productive oversight
- greater emphasis on accountabilities that will make compliance and acceptance more efficient.

With the scale of upcoming work, the industry must continue to drive change. With no change to the existing workforce range on major projects (currently 12,500–14,000), the productivity levels needed to deliver this program will need to change as outlined.

	Productivity required ($/person)					
	FY27	FY28	FY29	FY30	FY31	Avg (FY27–31)
Funded works	0.82–0.95	1.3–1.5	1.4–1.6	1.24–1.43	0.83–0.97	1.12–1.29
Funded + credibly proposed	1.07–1.23	1.67–1.94	2.06–2.38	2–2.32	1.61–1.86	1.68–1.95
Total	1.12–1.3	1.79–2.08	2.39–2.77	2.42–2.8	1.9–2.2	1.92–2.23

How Modern Methods of Construction can increase productivity

Modern Methods of Construction (MMC) has been generally associated with the building construction industry, where much effort has been made to adopt it. However, MMC is more than just modularisation and pre-fabrication, and there is arguably a greater application of it needed in the engineering construction sector – particularly on the projects identified in the QMPP.

In practice, MMC means standardising repeatable elements and pre-assembling them off-site, automating plant and equipment and processes, and consolidating the supply of key materials. These can be applied across a range of projects and project elements with significant opportunities to improve productivity through better utilisation of limited labour (workforce numbers and working hours), lower material wastage, greater use of recycled materials and more efficient deployment of resources.

Some examples of this include:



On bridges, mature modular systems and standardised design and elements already have demonstrated that with some solutions a single-span replacement can be completed in as little as three to five days, engineered for a design life of 100 years or more. For large-scale road and rail programs, standardising around a defined catalogue – such as a 20-metre prestressed concrete span and a small range of pre-ordered box culverts treating remaining bespoke structures as exceptions – would have a material impact on schedule and cost.



On transmission lines, a small catalogue of standard footing types could cover 80 to 90% of the ground conditions along a corridor, with bespoke engineering kept for genuine exceptions rather than designed afresh at every structure. The same logic is already being proven in the energy sector more broadly: precast, post-tensioned wind turbine foundations have demonstrated up to 45% faster construction and up to 70% less concrete placed on site compared with cast-in-place methods.



On highway corridors, consolidating the supply chain and moving to continuous, sensor-based compaction verification rather than periodic manual testing can be applied today across major road programs, delivering improved delivery efficiencies and schedule improvements. Using existing technology, automation of plant and equipment used in pavements and surfacing can also improve productivity substantially.

In some recent projects in the UK where up to 70% of standardised, pre-assembled components have been used, a 30% workforce reduction for those tasks – and importantly a 30% improvement in overall schedule – have been achieved.

Some examples of the scale of the opportunity as applied to the QMPP are outlined here:

Sector	Opportunities		Potential scale of opportunity
Roads and rail	Standardisation of: • bridges • culverts • road and rail pavement and embankment	Autonomous/ robotic: • road pavement • asphalt placement • steel placement and fixing • concrete pumping, placement and finishing • track placement • rail welding	15–30% of investment 15–30% improvement $800m–$2.8b
Water	Autonomous: • pipeline construction (excavation, pipeline laying and welding) • steel placement and fixing • concrete pumping, placement and finishing	Pre-assembly of components and modules in water treatment plants and wastewater treatment plants	5% of investment 10–20% improvement $50–$110m
Resources, energy and heavy industry	Modularisation and pre-assembly of process trains and elements		5% of investment 20–30% improvement $300–$500m
Electricity	Pre-assembly of components Precast foundations Standardised foundations and systems for transmission lines Modularisation of components into power generation		30% of investment 20–30% improvement $2b–$3b
2032 Games	Modularisation and pre-assembly of facilities, venues, villages Standardisation of building elements and fitout		10–30% of investment 15–35% improvement $150m–$1.3b

This could equate to a 3–5% annual output improvement for QMPP works.

Opportunities for industry to lift productivity

Through the work of the Queensland Productivity Commission (QPC) and current initiatives from Government, several areas to lift productivity across the industry have been clearly identified and are underway. The majority of these reforms deal with the whole of project lifecycle, in particular the interfaces around project development, procurement and into delivery. QMCA estimates these reforms could unlock $27.5b in value, including $10b for major engineering and construction, or about $666m extra work per year. This represents a 4–4.5% productivity boost.

However, this still falls short of what is needed to deliver the level of work outlined in this Report. The further increases in productivity required to achieve the lift in output will need to be driven by industry.

	Problem/Challenge	Opportunity	Potential productivity gain/year
Further procurement reform	Public sector procurement timeframes and complexity have increased, adding significant costs. This also delays the ability to deliver works.	Widespread adoption of more collaborative models to improve risk and certainty, and adoption of more standardised approaches to design and delivery, potentially unlocking up to $500m (1.3–1.9%) in extra work each year.	$300m–$500m
Indirect costs	Clients have shifted more delivery and project responsibility risk to contractors in recent times while also dictating the staffing levels. This has resulted in indirect costs on site rising from 15–25% 10–15 years ago to the recent estimate of 35–45%.	Reducing the tight specifications on technical and project delivery requirements, allowing delivery entities greater staffing flexibility and aligning risk more equitably could reduce indirect costs by 10% and improve productivity.	$100m–$250m
Industrial relations and management	There have been significant strides made in the civil construction industry with regard to managing industrial relations issues over the last 12–18 months, which have helped reset a number of contentious issues affecting productivity. The building sector has also seen some improvements, but there are legacy fixed conditions that still impact on productivity and will need to be addressed.	Further productivity gains can be made through: • Further flexibility in the management of conditions (for example limiting pre-starts to 15 minutes, some RDOs) • Management of hot weather to be more risk based and relevant to local conditions as per QMCA heat policy • Reducing impacts of mandated non-work time. These changes can deliver another 0.25–1 effective working day a week (depending on the current arrangements).	$300m–$900m
Modern Methods of Construction and delivery	The infrastructure sector has not embraced the opportunity to adopt large-scale technical innovation and automation to uplift performance and safety as other sectors such as mining and manufacturing have done. In this regard, the focus has been on the building sector with greater levels of pre-fabrication and modularisation of housing and common elements, but there remain significant opportunities to lift productivity using existing or newly developed technologies and solutions. The level of investment required to help progress these solutions is often quite high and restrictive to many smaller organisations and/or where there is a small pipeline of committed works.	Some opportunities include: • Short term: Pre-assembly of elements (foundations, bridge elements), modularisation of processing trains (water, resources and energy), remotely operated or autonomous earthmoving equipment on greenfield projects • Medium term: Autonomous earthmoving and paving operations, robotic steel and concrete placement • Long term: Large-scale autonomous onsite systems integrated into early stage design development. This needs a program level investment or client investment alongside industry.	$660m-$1.5b
Onsite cultural behaviours	The Cost of Doing Nothing Report identified $8b in annual lost opportunity cost across the industry from poor cultural behaviours leading to mental health issues, high turnover, lack of diversity and retention issues.	Improving industry culture on site through better workplace management solutions, including part-time work, diversity, and better support and training.	$160m–$320m

	Problem/Challenge	Opportunity	Potential productivity gain/year
Project development and management	Over the past 10–15 years the construction value as a proportion of the total project value has fallen, particularly for public sector works. This ratio is now down to 60–70%. This has been a function of the now-standard long and detailed planning and design processes, coupled with large amounts of time and cost being spent on transaction management and project oversight project management. In the private sector the ratio between construction costs and total project value is a lot higher (~75–85%), a function of the more efficient approach to project development and delivery management.	Project owners (industry clients) need to review where the total project investment is best spent to deliver value for money through more efficient planning, procurement and project delivery management. By improving efficiency, more work can be delivered. A 10% improvement in the ratio between construction value and total project value for public projects can deliver better value for money.	$600m–$700m
Total			**8–15%**

Not all of these initiatives can be achieved immediately or in their entirety, but they can have an impact over the next three to five years.

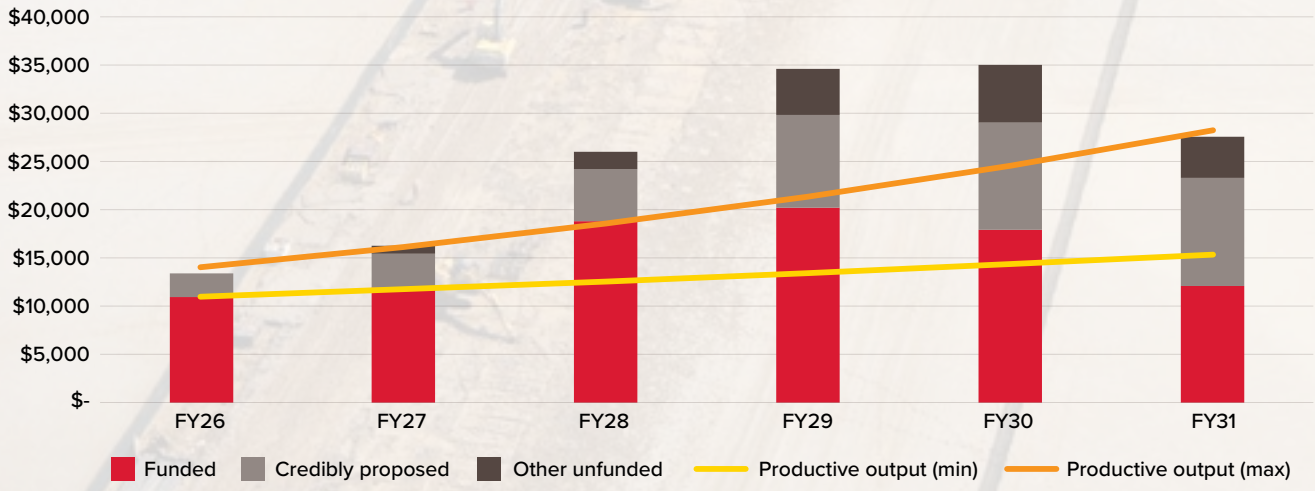
Impact of productivity initiatives over 3–5 years



Source: QMCA analysis

The industry output could grow to between $68b and $105.5b over the five years of the pipeline, or an average of between $13.7b and $21.1b per year (87% of the funded + credibly proposed works). This considers half of the potential improvements in productivity (4–7%) coupled with the 4–4.5% improvements the QPC actions might offer as well as the annual workforce growth (2.5–5%). Further reforms and workforce growth approaching 10% annually will ensure that the funded and credibly proposed projects can all be delivered.

Potential annual industry output capacity ($m)



Source: QMCA analysis



QMCA

QUEENSLAND MAJOR CONTRACTORS ASSOCIATION

CBUS

Queensland
Major Projects Pipeline
2026

ROADS, BRIDGES & RUNWAYS

Product Description	Sponsor	Type of Funding	Agg. Region	Total Value ($m)	Eng Value ($m)	Status	25/26	26/27	27/28	28/29	29/30	30/31	31/32	32/33	33/34	34/35	35/36
Brisbane Metro CP	Brisbane City Council	Public	Brisbane	1700	765	Under Construction	125	49									
Brisbane Metro - Northern Extension	Brisbane City Council	Public	Brisbane	1150	780	Prospective			204	204	204	204					
Brisbane Metro- Eastern Extension	Brisbane City Council	Public	Brisbane	950	644	Prospective			225	225	225						
Brisbane Metro - Airport Extension	Brisbane City Council	Public	Brisbane	750	509	Prospective				178	178	178					
Bruce Highway - Cairns Southern Access Corridor Stage 5 - Foster Road intersection	Qld Government	Public	Cairns	225	162	Announced								44	88	43	
Bruce Highway – Anzac Avenue to Uhlmann Road	Qld Government	Public	Brisbane	733	623	Announced			130	304	242						
Bruce Highway - Dohles Rocks Road North Facing Ramps	Qld Government	Public	Brisbane	290	163	Under Construction	56	79	55								
Bruce Highway - Linkfield Road Overpass	Qld Government	Public	Brisbane	176	123	Under Procurement		10	58	55							
Bruce Highway - Gateway Mwy - Dohles Rocks Rd- Stage 1	Qld Government	Public	Brisbane	950	713	Under Procurement	45	141	187	187	156	50					
Bruce Highway - Gateway Mwy - Dohles Rocks Rd- Stage 2	Qld Government	Public	Brisbane	550	413	Announced				108	108	108	108				
Bruce Highway - Rockhampton Ring Road (North & South Packages) - Stage 2	Qld Government	Public	Fitzroy	1215	851	Under Construction	267	250	234	100							
Bruce Highway - Tiaro Flood Immunity Upgrade	Qld Government	Public	Wide Bay	550	400	Under Procurement			40	190	160	10					
Bruce Highway - Gorganga Plains Upgrade	Qld Government	Public	Mackay – Isaac – Whitsunday	550	475	Announced			125	200	150						
Caloundra Transport Corridor Upgrade (Nicklin Way-Third Avenue extension)	Sunshine Coast Council & Qld Government	Public	Sunshine Coast	100	80	Under Procurement		40	42								
Caloundra Road Network Upgrade (Kawana Link Rd/ Caloundra Rd Upgrade & Caloundra Rd/ Nicklin Way Upgrade)	Qld Government	Public	Sunshine Coast	300	217	Announced				72	72	72					
Cairns Western Arterial Road - Redlynch Connector Road to Captain Cook Highway, Duplication	Qld Government	Public	Cairns	300	230	Announced				65	65	54	46				
Centenary Highway Capacity Upgrade - Ipswich Motorway to Toowong	Qld Government	Public	Brisbane	400	240	Prospective								43	87	87	43
Centenary Hwy Bridge Duplication	Qld Government	Public	Brisbane	353	265	Under Construction	51	42	40								
Cooktown to Weipa Corridor Upgrade (Cape York Regional Package 2)	Qld Government	Public	Outback	323	220	Under Construction	26	22	20	5							
Coomera Connector Stage 1- Central	Qld Government	Public	Gold Coast	1800	1260	Under Construction	402	330	139								
Coomera Connector Stage 1- South	Qld Government	Public	Gold Coast	500	400	Under Construction	130	130	57								
Coomera Connector - Stage 2	Qld Government	Public	Gold Coast	3000	2035	Announced				533	533	533	500	33			

ROADS, BRIDGES & RUNWAYS

Product Description	Sponsor	Type of Funding	Agg. Region	Total Value ($m)	Eng Value ($m)	Status	25/26	26/27	27/28	28/29	29/30	30/31	31/32	32/33	33/34	34/35	35/36
Gateway Motorway- Bruce Highway Stage 1: Telegraph Rd to Pine River	Qld Government	Public	Brisbane	1500	1200	Under Construction	10	50	400	400	340						
North South Urban Arterial Corridor (Moreton Connector)	Qld Government	Public	Brisbane	920	690	Prospective										55	143
Inland Freight Route (Mungindi to Charters Towers) Upgrades	Qld Government	Public	Darling Downs – Maranoa	1000	715	Under Construction	47	30	100	119	140	119	100	60			
Ipswich Motorway; Rocklea to Darra Stage 2 - Oxley to Darra	Qld Government	Public	Ipswich – Toowoomba – Logan	520	390	Announced				65	293	65					
Level Crossing Removal - Boundary Road	Qld Government	Public	Brisbane	399	279	Announced			54	120	105						
Level Crossing Removal - Lindum Rail Crossing Upgrade	Brisbane City Council / Qld Government / Federal Government	Public	Brisbane	300	250	Announced					72	108	87				
Level Crossing Removal - Cavendish Road	Qld Government	Public	Brisbane	500	400	Credibly Proposed						25	175	200			
M1 Pacific Motorway North: Daisy Hill to Logan Motorway	Qld Government	Public	Gold Coast	3000	2000	Credibly Proposed						325	488	542	488	325	
Mackay Port Access- Bruce Highway to Mackay - Slade Point Road	Qld Government	Public	Mackay – Isaac – Whitsunday	350	254	Credibly Proposed				81	100	73					
Sunshine Motorway - West Coolum Interchange	Qld Government	Public	Sunshine Coast	100	70	Credibly Proposed				21	25	24					
Sunshine Motorway - Mooloolah River Interchange Stage 2	Qld Government	Public	Sunshine Coast	850	595	Announced			92	125	187	141	50				
Tennant Creek to Townsville Corridor Upgrade - Queensland	Qld Government	Public	Townsville	263	189	Under Construction	47	49	3								
Warrego Highway Upgrades between Toowoomba and Roma	Qld Government	Public	Townsville	125	94	Under Construction	26	28	25								
Warrego Highway Upgrades between Ipswich and Toowoomba	Qld Government	Public	Ipswich – Toowoomba – Logan	468	345	Under Construction	89	93	93	47							
Youngs Crossing Road, Lawnton	Moreton Bay Regional Council	Public	Brisbane	120	95	Under Construction	40	35	11								
Outback Way, QLD	Federal Government	Public	Outback	224	145	Under Construction	21	27	27	22	16						
Captain Cook Highway - Cairns CBD to Smithfield, Upgrade (Cairns Ring Road)	Qld Government	Public	Cairns	359	244	Announced				54	76	76	59				
Brisbane Airport Upgrade (Third Terminal)	Brisbane Airport Corporation	Private	Brisbane	800	650	Credibly Proposed				100	200	200	150				
Brisbane Airport Upgrade Program (Runways & Airfield Works)	Brisbane Airport Corporation	Private	Brisbane	400	340	Announced			50	100	100	90					
Brisbane Airport Upgrade (Parking and Access Upgrades)	Brisbane Airport Corporation	Private	Brisbane	680	578	Announced			50	100	150	150	128				
Brisbane Airport Upgrade (Roads & Transport)	Brisbane Airport Corporation	Private	Brisbane	300	255	Announced			25	55	100	75					
Brisbane Airport Upgrade (Services &Utilities)	Brisbane Airport Corporation	Private	Brisbane	300	255	Announced		25	70	70	55	20	15				

ROADS, BRIDGES & RUNWAYS

Product Description	Sponsor	Type of Funding	Agg. Region	Total Value ($m)	Eng Value ($m)	Status	25/26	26/27	27/28	28/29	29/30	30/31	31/32	32/33	33/34	34/35	35/36
Queensland Beef Corridors	Qld Government	Public	Fitzroy	500	375	Under Construction	38	23	45	45	50	50	48	40			
Outback Way - Queensland Future Priorities	Federal Government	Public	Outback	183	119	Under Construction	16	27	27	16	11	9					
Logan Motorway - Western Upgrade	Transurban	Private	Brisbane	1000	700	Under Procurement			108	271	271	108					
Townsville Connection Road (Stuart Drive), Bowen Road Bridge (Idalia), duplicate bridge and approaches	Qld Government	Public	Townsville	100	69	Under Construction	21	10									
Access to Gladstone Port, improve heavy vehicle access	Qld Government	Public	Fitzroy	125	86	Credibly Proposed					30	30	30				
Cleveland - Redland Bay Road, Anita Street to Giles Road, duplicate lanes	Qld Government	Public	Brisbane	80	55	Announced			19	20	19						
Kuranda Range Road, safety and resilience upgrades	Qld Government	Public	Cairns	262.5	182	Announced			35	38	39	39	32				
Bruce Highway Targeted Safety Program , Gympie to Cairns (Far North)	Qld Government	Public	Cairns	1600	1120	Under Construction	25	113	246	246	246	246					
Bruce Highway Targeted Safety Program , Gympie to Cairns (Northern)	Qld Government	Public	Townsville	1300	910	Under Construction	20	92	199	199	199	199					
Bruce Highway Targeted Safety Program , Gympie to Cairns (Mackay Section)	Qld Government	Public	Mackay – Isaac – Whitsunday	2100	1470	Under Construction	33	148	322	322	322	322					
Bruce Highway Targeted Safety Program , Gympie to Cairns (Central Section)	Qld Government	Public	Fitzroy	2500	1750	Under Construction	39	177	384	384	384	384					
Bruce Highway Targeted Safety Program , Gympie to Cairns (Wide Bay)	Qld Government	Public	Wide Bay	700	490	Under Construction	11	49	107	107	107	107					
Bruce Highway Targeted Safety Program , Gympie to Cairns (Multi-Region)	Qld Government	Public	Multi-Region	800	487	Under Construction	138	49	107	107	107	107					
The Wave - Stage 3 -BRT Infrastructure (Birtinya to Maroochydore)	Qld Government	Public	Sunshine Coast	1500	1038	Announced			250	250	250	250	38				
Barron River Gorge Bridge Replacement	Qld Government	Public	Cairns	490	339	Under Procurement			178	177							
Bremer River Bridge Rehabilitation	Qld Government	Public	Ipswich – Toowoomba – Logan	85	59	Under Construction	18	23	43								
Bruce Highway – Gargett–Eton Range Upgrade	Qld Government	Public	Mackay – Isaac – Whitsunday	350	243	Credibly Proposed					49	97	97				
Bruce Highway – Far North Queensland Bridge Replacements (3 Bridges)	Qld Government	Public	Cairns	220	153	Under Construction		31	61	61							
Story Bridge Restoration Program- Stage 1	Brisbane City Council	Public	Brisbane	1600	1109	Announced		4	75	230	300	300	200				
Back Creek & Tanduringie Creek Bridge Replacements	Qld Government	Public	Wide Bay	120	83	Credibly Proposed				42	42						
Mooloolah River Interchange Upgrade – Stage 1	Qld Government	Public	Sunshine Coast	320	222	Under Procurement			44	89	89						
North Brisbane Tunnel	Qld Government	Public	Brisbane	8000	3279	Credibly Proposed								500	926	926	926

ROADS, BRIDGES & RUNWAYS

Product Description	Sponsor	Type of Funding	Agg. Region	Total Value ($m)	Eng Value ($m)	Status	25/26	26/27	27/28	28/29	29/30	30/31	31/32	32/33	33/34	34/35	35/36
Bribie Island Bridge Upgrade (Duplication)	Qld Government	Public	Brisbane	350	243	Announced			49	97	97						
M1 Pacific Motorway – Exit 45 (North) Ormeau Upgrade	Qld Government	Public	Gold Coast	180	125	Announced				50	75						
Bruce Highway - Rockhampton Ring Road (North & South Packages) - Stage 1	Qld Government	Public	Fitzroy	515	361	Under Construction	50										
Bruce Highway - Upgrade Burdekin River Bridge	Qld Government	Public	Townsville	97	53	Under Construction	9	9	6								
Coomera Connector Stage 1- North	Qld Government	Public	Gold Coast	1200	840	Under Construction	66										
Cunningham Highway Upgrade	Qld Government	Public	Ipswich – Toowoomba – Logan	350	261	Under Construction	75										
Level Crossing Removal - Beams Road	Qld Government	Public	Brisbane	235	165	Under Construction	37	21									
Mt Lindesay Highway - Johanna Street to South Street	Qld Government	Public	Ipswich – Toowoomba – Logan	95	69	Under Construction	59										
Riverway Drive Stage 2 (Allambie Lane - Dunlop Street)	Qld Government	Public	Townsville	135	95	Under Construction	53	15									
Toowong -West End Green Bridge	Brisbane City Council	Public	Brisbane	450	302	Prospective					80	122	100				
St Lucia- West End Green Bridge	Brisbane City Council	Public	Brisbane	450	302	Prospective								80	122	100	
Northshore Hamilton Roadworks	Economic Development Qld	Public	Brisbane	150	100	Under Construction	40	20									
Beams Road Upgrade, Carseldine	Brisbane City Council	Public	Brisbane	73	61	Under Construction	16	10									
Yeppoon Road upgrade (Iron Pot Rd - Tanby Rd)	Qld Government	Public	Fitzroy	155	116	Under Construction	44										
Townsville Connection Road (University Rd- Bowen Rd Bridge)	Qld Government	Public	Townsville	96	66	Under Construction	18										

RAIL

Product Description	Sponsor	Type of Funding	Agg. Region	Total Value ($m)	Eng Value ($m)	Status	25/26	26/27	27/28	28/29	29/30	30/31	31/32	32/33	33/34	34/35	35/36
Beerburrum to Nambour Rail Upgrade (Stage 1)	Qld Government / QR	Public	Sunshine Coast	1004	800	Under Construction	154	200	200	116							
Varsity Lakes to Elanora Extension	Qld Government / QR	Public	Gold Coast	859	470	Credibly Proposed									140	193	172
Elanora to Coolangatta extension	Qld Government	Public	Gold Coast	700	490	Prospective									171	171	171
Moura - Aldoga Link Project (Wiggins)	Qld Government	Public	Fitzroy	500	325	Unlikely								145	150	54	
Gold Coast Light Rail Stage 3	Qld Government & Federal Government	Public	Gold Coast	1549	1200	Under Construction	381	212									
Shorncliffe Line	Queensland Rail	Public	Brisbane	350	250	Prospective				90	90	90					
Loganlea Station Relocation	Qld Government & Federal Government	Public	Ipswich – Toowoomba – Logan	174	113	Under Construction	29	30	30								
Logan and Gold Coast Faster Rail (Main Line Upgrade)	Qld Government & Federal Government	Public	Ipswich – Toowoomba – Logan	5250	3150	Under Construction	259	550	750	750	715						
Logan and Gold Coast Faster Rail (Level Crossing Removals)	Qld Government & Federal Government	Public	Ipswich – Toowoomba – Logan	500	500	Under Construction	205	161									
The Wave - Stage 1a Direct Sunshine Coast Line (Beerwah to Caloundra)	Qld Government	Public	Sunshine Coast	1000	850	Under Construction		100	200	200	200	150					
The Wave - Stage 1b Direct Sunshine Coast Line (Beerwah to Caloundra)	Qld Government	Public	Sunshine Coast	2850	2500	Under Construction		150	350	500	600	600	300				
The Wave - Stage 2 Direct Sunshine Coast Line (Caloundra to Birtinya)	Qld Government	Public	Sunshine Coast	2000	1380	Under Procurement			280	250	300	300	250				
Gold Coast Light Rail Stage 2b (Parklands- Harbour Town)	Qld Government	Public	Gold Coast	700	600	Under Procurement			100	150	200	150					
Gold Coast Light Rail Stage 4	Qld Government & Federal Government	Public	Gold Coast	750	600	Unlikely									161	269	215
Beerburrum to Nambour Duplication (Stage 2)	Qld Government	Public	Sunshine Coast	600	500	Credibly Proposed				134	134	134	134				
Station Upgrade Program	Queensland Rail	Public	Brisbane	500	500	Prospective				131	131	131	131				
New Generation Rollingstock, Automatic Train Operation and Platform Screen Doors fitment	Qld Government & Federal Government	Public	Brisbane	275	202	Under Procurement		70	73	68	212						
CRR; Tunnel, Stations and Development (TSD) PPP	Qld Government	Public	Brisbane	7000	4256	Under Construction	256	250									
CRR; Rail, Integration and Systems package (RIS)	Qld Government	Public	Brisbane	3800	2250	Under Construction	350	350	200	50	200						
CRR; European Train Control System Level 2	Qld Government	Public	Brisbane	764	720	Under Construction	45	125	125	85							
CRR; New stations (Pimpama, Hope Island and Merrimac)	Qld Government	Public	Brisbane	550	500	Under Construction	300	50									
CRR; Clapham Yard Stabling (Moorooka)	Queensland Rail	Public	Brisbane	299	120	Under Construction	5										
Inner City signalling upgrades, various locations, upgrade signalling and interlocking	Qld Government & Federal Government	Public	Brisbane	765	562	Under Construction	56										
Mayne Yard (Mayne), upgrade vehicle and pedestrian access	Qld Government & Federal Government	Public	Brisbane	300	221	Under Construction	110										
New Generation Rollingstock, integration and ancillary works	Qld Government & Federal Government	Public	Brisbane	265	195	Under Construction	95	25									
New Generation Rollingstock, European Train Control System fitment, install new signalling	Qld Government & Federal Government	Public	Brisbane	375	276	Under Construction	100	76									
Timber Bridges program	Qld Government & Federal Government	Public	Multi-Region	250	180	Prospective			20	20	20	20	20	20	20	20	20

HARBOURS/PORTS

Product Description	Sponsor	Type of funding	Agg. Region	Total Value ($m)	Eng Value ($m)	Status	25/26	26/27	27/28	28/29	29/30	30/31	31/32	32/33	33/34	34/35	35/36
Townsville Port Expansion Project - Outer Harbour Expansion (berths 14+15)	Qld Government	Public	Townsville	690	449	Prospective						148	148	148			
Urangan Boat Harbour	Qld Government	Private	Wide Bay	800	200	Credibly Proposed					90	103	11				
Abbot point Dredging	Qld Government	Public	Mackay – Isaac – Whitsunday	600	270	Credibly Proposed								90	90	90	
Port of Gladstone - Second Shipping Lane (Gatcombe and Golding Cutting Channel Duplication Project)	Gladstone Port Authority	Public	Fitzroy	760	532	Prospective		192	237	171							
Cairns Port Ship Lift & Marine Precinct	Ports North	Public	Cairns	600	500	Under Procurement		133	225	192							
Port Hinchinbrook Revitalisation (Dredging, remediation, and resilience works to restore navigability and address environmental issues)	Qld Government	Public	Townsville	64	50	Announced		25	25								
Port of Townsville Channel Capacity Expansion (Stage 2)	Port of Townsville	Public	Townsville	232	127	Announced			6.35	38.1	38.1	38.1	6.35				
Port of Brisbane Fuel Security Precinct	Qld Government	Private	Brisbane	150	100	Announced			20	40	40						
Fuel Storage & Refining Precinct – Port of Gladstone	Qld Government	Private	Fitzroy	60	50	Credibly Proposed			12.5	12.5	12.5	12.5					
Fuel Storage & Refining Precinct – Port of Townsville	Qld Government	Private	Townsville	60	50	Credibly Proposed			10	10	10	10	10				
Fuel Storage & Refining Precinct – Port of Mackay	Qld Government	Private	Mackay – Isaac – Whitsunday	60	50	Credibly Proposed			10	10	10	10	10				
Port Hinchinbrook Precinct Restoration	Qld Government	Public	Townsville	100	55	Under construction		11	22	22							
Northern Land Expansion Project (NLEP) – Southern Bund Extension	Port of Townsville	Public	Fitroy	78.9	50	Under construction		25	25								
Gladstone Coal Shiploader Project	Gladstone Ports Corporation	Public	Fitzroy	100	80	Announced	41										
Gold Coast Cruise Ship Terminal	Gold Coast City Council	Private	Gold Coast	260	182	Prospective						26	39	57	39	26	
Wiggins Island Coal Terminal (Stages 2 and 3)	Wiggins Island Coal Export Terminal (WICET)	QLD	Fitzroy	580	327	Prospective						65	65	65	65	65	

DEFENCE

Product Description	Sponsor	Type of funding	Agg. Region	Total Value ($m)	Eng Value ($m)	Status	25/26	26/27	27/28	28/29	29/30	30/31	31/32	32/33	33/34	34/35	35/36
Herveys Range Facility Upgrade	Federal Government	Public	Townsville	1000	800	Under Construction	200	210	210	210							
ESTJP2093PH1 Guided Weapons Explosive Ordnance Storage Project (NSW and QLD)	Federal Government	Public	Multi-Region	200	200	Under Construction	67	70	70								
Sherger Airbase Upgrade	Federal Government	Public	Outback	300	200	Credibly Proposed		63	84	63							
Army Aviation of Program of Works - Stage 2 Delivery Phase	Federal Government	Public	Multi-Region	370	200	Under Construction	67	70									
RAAF Base Amberley - Ongoing Expansion and Capability Projects (near Ipswich)	Federal Government	Public	Ipswich – Toowoomba – Logan	735	565	Under Construction	94	99	99	99	99						
RAAF Townsville (Garbutt)	Federal Government	Public	Townsville	700	538	Under Construction	179	188									
HeliMods Aerospace Infrastructure Expansion	HeliMods Pty Ltd	Private	Sunshine Coast	80	58	Under Construction		29	29								
Norship Naval Certified Servicing Yard Upgrade	Norship Marine Pty Ltd	Private	Brisbane	120	87	Credibly Proposed			44	44							
EPE Oceania Small Drone Manufacturing Precinct	EPE Oceania Pty Ltd	Private	Brisbane	65	50	Credibly Proposed			25	25							
Greenvale Training Area Upgrade	Federal Government	Public	Townsville	807	610	Under procurement			122	183	183	122					
HMAS Cairns to accommodate new Arafura-class Offshore Patrol Vessels	Federal Government	Public	Cairns	155	119	Under Construction	59										
North Queensland Mid-Term Refresh Program	Federal Government	Public	Multi-Region	112	86	Under Construction	43										

WATER

Product Description	Sponsor	Type of funding	Agg. Region	Total Value ($m)	Eng Value ($m)	Status	25/26	26/27	27/28	28/29	29/30	30/31	31/32	32/33	33/34	34/35	35/36
Paradise Dam Improvement Project	SunWater	Public	Wide Bay	4400	2000	Announced	72	35	35	35	150	500	500	400	273		
Burdekin Falls Dam - Raising	SunWater	Public	Townsville	2500	1750	Credibly Proposed				459	459	459	459				
Fitzroy to Gladstone Water - Pipeline and Water Treatment Plant	GAWB	Public	Fitzroy	983	688	Under Construction	184										
Somerset Dam Upgrade	SEQ Water	Public	Ipswich – Toowoomba – Logan	1000	850	Announced				150	200	200	200	100			
Toowoomba to Warwick pipeline	SEQ Water	Public	Ipswich – Toowoomba – Logan	370	222	Under Construction		34	101	101							
The Cairns Water Security Stage 1	Cairns City Council	Public	Cairns	300	250	Under Construction	141	73									
Lake MacDonald Dam Upgrade	SEQ Water	Public	Sunshine Coast	420	320	Under Construction	98	93	79	25							
Wyaralong Dam WTP Stage 1	SEQ Water	Public	Ipswich – Toowoomba – Logan	1000	870	Under Procurement	20	242	242	215	151						
Haughton Channel Capacity Upgrade	Sunwater	Public	Townsville	90	70	Prospective			37	37							
Gold Coast Desal Augmentation	SEQ Water	Public	Gold Coast	600	400	Credibly Proposed					100	100	100	100			
Coolmunda Dam	SunWater	Public	Darling Downs – Maranoa	100	100	Credibly Proposed				54	54						
Teemburra Dam	SunWater	Public	Mackay – Isaac – Whitsunday	100	100	Credibly Proposed				54	54						
North Pine Dam	SEQ Water	Public	Brisbane	1000	756	Announced			198	198	198	198					
Cressbrook Dam Upgrade	Toowoomba Regional Council	Public	Ipswich – Toowoomba – Logan	270	243	Under Construction	10	53	90	90							
Ross River Dam Remediation	Townsville City Council	Public	Townsville	500	400	Credibly Proposed	0	143	143	143	0						
Burdekin- Bowen Pipeline	SunWater	Public	Townsville	250	200	Credibly Proposed	92	118									
Wivenhoe Dam Improvement	SEQ Water	Public	Ipswich – Toowoomba – Logan	2500	1750	Credibly Proposed						150	600	600	400		
Awoonga Dam Spillway Upgrade	GAWB	Public	Fitzroy	500	350	Credibly Proposed							123	123	123		
Somerset Dam- Early Works	SEQ Water	Public	Ipswich – Toowoomba – Logan	500	355	Announced			124	124	124						
Lowood WTP	SEQ Water	Public	Ipswich – Toowoomba – Logan	222	158	Credibly Proposed					56	56	56				
Canungra Off Stream Storage	SEQ Water	Public	Brisbane	450	320	Credibly Proposed				112	112	112					
Gold Coast Desal Pipeline Upgrade	SEQ Water	Public	Gold Coast	200	150	Credibly Proposed					50	50	50				

WATER

Product Description	Sponsor	Type of funding	Agg. Region	Total Value ($m)	Eng Value ($m)	Status	25/26	26/27	27/28	28/29	29/30	30/31	31/32	32/33	33/34	34/35	35/36
Northern Pipeline Interconnector (NPI3)	SEQ Water	Public	Sunshine Coast	1000	700	Credibly Proposed				25	200	200	200	75			
Regional New Weirs Construction Package	Qld Government	Public	Ouback	695	499	Credibly Proposed			25	150	150	150	25				
Indigenous Communities Water Security Program	Qld Government	Public	Multi-Region	196	141	Under Construction (Program)		17.6	17.6	17.6	17.6	17.6	17.6	17.6	17.6		
Emu Swamp Dam	Emu Swamp Dam Joint Venture Pty Ltd	Public	Darling Downs – Maranoa	160	115	Credibly Proposed					15	50	50				
Water for Warrill Irrigation Project	Qld Government	Public	Ipswich – Toowoomba – Logan	250	180	Credibly Proposed				36	72	72					
Lockyer Valley and Somerset Water Security Scheme	Seqwater / Qld Government	Public	Ipswich – Toowoomba – Logan	650	467	Credibly Proposed			50	230	187						
Westbrook Water Treatment Plant	Toowoomba Regional Council	Public	Ipswich – Toowoomba – Logan	195	140	Announced			70	70							
Charters Towers Water for Growth – Packages 1 & 2	Charters Towers Regional Council	Public	Outback	80	57	Under Construction		11.4	22.8	22.8							
Mount Crosby Additional Pathogen barrier	SEQ Water	Public	Brisbane	250	180	Credibly Proposed				60	60	60					
Mt Crosby West Bank WTP Solids Handling	SEQ Water	Public	Brisbane	250	180	Credibly Proposed					90	90					
Mount Crosby East Bank critical electrical infrastructure upgrade 59,348 47,289 11,659 400	SEQ Water	Public	Brisbane	50	38	Under Construction	38										
South West Pipeline	SEQ Water	Public	Brisbane	95	72	Under Construction	36										
Barlil Weir	Sunwater	Public	Wide Bay	100	70	under procurement			20	50							
Cooranga Wier	Sunwater	Public	Wide Bay	150	105	under procurement			25	75	5						
Haughton Pipeline Duplication - Stage 2	Townsville City Council	Public	Townsville	275	183	Under Construction	10										
Rockhampton - Mt Morgan Water Pipeline	Rockhampton City Council/ Qld Governemnt / Federal Government	Public	Fitzroy	88	55	Under Construction	31										

SEWERAGE

Product Description	Sponsor	Type of funding	Agg. Region	Total Value ($m)	Eng Value ($m)	Status	25/26	26/27	27/28	28/29	29/30	30/31	31/32	32/33	33/34	34/35	35/36
Luggage Point Sewerage Scheme	Urban Utilities	Public	Brisbane	600	500	Under Construction	39	41	41								
Bulimba to Hamilton Siphon	Urban Utilities	Public	Brisbane	94	70	Under Construction	12	13	13	13	13						
Burpengary East STP Upgrade	Unity Water	Public	Sunshine Coast	100	70	Under Construction	21	22									
S2 & Corinda Chelmer Sewer Augmentation	Urban Utilities	Public	Brisbane	69	52	Announced	9	9	9	9	9	9					
Logan Water Infrastructure Program Alliance	Logan City Council	Public	Ipswich – Toowoomba – Logan	1000	746	Under Construction	85	89	89								
Gold Coast Council Long Term Recycled Water Release Stage 2 - South Stradbroke pipeline	Gold Coast City Council	Public	Gold Coast	250	188	Announced		63	137								
Eagle Farm Rising Main Upgrade - A	Urban Utilities	Public	Brisbane	165	124	Announced		16	17	17	17	17	17	17	17		
Kawana STP Upgrade	Unity Water	Public	Sunshine Coast	250	173	Under Procurement		26	55	55	38						
Norman Creek Sewer Augmentation - Brisbane	Urban Utilities	Public	Brisbane	122	92	Announced			39	32	27						
Chambers Flat Wastewater Treatment Plant (Logan)	Logan City Council	Public	Brisbane	335	257	Under Procurement	37	39	39	39	39	39	39				
Gold Coast STP Infrastructure Development Program	Gold Coast City Council	Public	Gold Coast	600	300	Under Construction	43	45	45	45	45	45					
Mount Peter Priority Development Area Sewerage Upgrades	Cairns Regional Council	Public	Cairns	59	50	Under Construction		10	20	20							
Brendale STP Upgrade	Unity Water	Public	Brisbane	65	55	Under Construction	15	10	10	5							
Aura & Harmony Water and Sewerage Network	Unity Water	Public	Sunshine Coast	230	200	Under Construction	31										

ELECTRICITY

Product Description	Sponsor	Type of funding	Agg. Region	Total Value ($m)	Eng Value ($m)	Status	25/26	26/27	27/28	28/29	29/30	30/31	31/32	32/33	33/34	34/35	35/36
Bulli Creek Solar Farm (>1000 MW)	Genex Power (& Solar Choice)	Private	Darling Downs – Maranoa	1500	675	Announced			128	332	215						
Raglan Solar (300MW)	Eco Energy Group	Private	Fitzroy	327	114	Announced		60	61								
Kidston Solar Project - Stage 2 (270 MW)	Genex Power	Private	Outback	400	140	Credibly Proposed				70	70						
258MW Kidston Stage 3 Wind Project	Genex Power	Private	Outback	295	103	Credibly Proposed				20	50	33					
Baralaba Solar Farm 92MW	FRV Services Australia Pty Ltd	Private	Fitzroy	150	53	Prospective				27	29						
Clermont (Phase 2) 75MW	Wirsol Energy	Private	Mackay – Isaac – Whitsunday	120	42	Prospective				13	32						
Lower Wonga Solar Farm (Stage 1) 350MW	Solar Q	Private	Wide Bay	560	196	Under Construction	39	80	84								
Blair Athol Solar Farm 60MW	TerraCom Limited	Private	Mackay – Isaac – Whitsunday	100	35	Prospective				18	12	8					
Chinchilla Solar Farm 100MW	First Solar	Private	Darling Downs – Maranoa	160	56	Prospective				29	30						
Rugby Run Solar Farm Stage 2 105MW	Adani Australia	Private	Mackay – Isaac – Whitsunday	170	60	Prospective				21	42						
Clarke Creek Wind and Solar Farm (stages 1 and 2)	Squadron Energy	Private	Mackay – Isaac – Whitsunday	3000	700	Under Construction	100	130	50								
Majors Creek Solar Project 400MW	Edify Energy	Private	Townsville	640	224	Prospective				54	108	80					
Lakeland Wind Farm 100MW	Windlab	Private	Cairns	160	56	Prospective				38	22						
Rolleston Solar Farm 90MW	RES Australia	Private	Fitzroy	140	49	Prospective				22	31						
Dysart Solar Energy Farm 100MW	Tilt Renewables	Private	Mackay – Isaac – Whitsunday	200	70	Prospective				38	38						
Burdekin Solar Farm 140MW	CleanGen	Private	Mackay – Isaac - Whitsunday	220	77	Announced			40	41							
Desailly Renewable Energy Park 1000MW	DP Energy	Private	Cairns	1600	560	Prospective				108	280	215					
Archer Point Wind Farm 120MW	Wind Power Queensland	Private	Townsville	190	67	Prospective				31	39						
Aramara Solar Farm (140 MW)	Eco Energy World (EEW) Australia	Private	Wide Bay	280	98	Credibly Proposed		52	54								
Burdekin Falls - hydro-electric power station (50MW)	Stanwell	Public	Townsville	200	120	Prospective				32	65	32					
Copperstring Transmission Line (Eastern Link)	Qld Government	Public	Outback	3500	2450	Under Construction	150	500	500	500	500	300					
Copperstring Transmission Line (Western Link)	Qld Government	Public	Outback	5500	3150	Announced						150	750	750	750	750	
Forest Wind	Clean Sight/Siemens Financial Services	Private	Wide Bay	2000	1000	Announced			420	420	80						
Lockyer Valley hybrid gas-BESS- Stage 1	Stanwell	Public	Darling Downs – Maranoa	200	120	Credibly Proposed					62	65	65				
Big T pumped hydro storage project	BE Power Projects Pty Ltd	Private	Ipswich – Toowoomba – Logan	1500	1050	Credibly Proposed					150	370	350	130			
Banana Range Wind Farm	EDF Group	Private	Mackay – Isaac – Whitsunday	500	300	Prospective				105	108	108					

ELECTRICITY

Product Description	Sponsor	Type of funding	Agg. Region	Total Value ($m)	Eng Value ($m)	Status	25/26	26/27	27/28	28/29	29/30	30/31	31/32	32/33	33/34	34/35	35/36
Stanwell Power Station BESS (300MW)	Stanwell / Qld government	Public	Fitzroy	747	149	Under Construction	75	74									
Tarong West Wind Farm	Stanwell Corporation	Public	Wide Bay	776	466	Prospective				131	215	151					
Herries Range Wind Farm	Acciona (70%) / Ark Energy (30%)	Private	Darling Downs – Maranoa	2000	1000	Credibly Proposed	308	495	258								
Mount Hopeful Wind Farm	Neoen	Private	Fitzroy	750	488	Credibly Proposed	257	121									
North Queensland Super Hub	Fortescue / WindLab	Private	Fitzroy	18000	7200	Credibly Proposed	616	1290	1290	1935	1290	1290					
Moah Creek Renewable Energy	RES Australia / Energy Estate	Private	Fitzroy	6700	2680	Prospective		240	480	480	720	480	480				
Brendale SuperNode Battery & Data Centre	Quinbrook	Private	Brisbane	500	500	Under Construction	205	161									
Boomer Green Energy Wind Farm	Ark Energy	Private	Fitzroy	3000	2100	Credibly Proposed	431	452	452	452	452						
Borumba - PHES Main Works	Qld Hydro	Public	Wide Bay	8000	6400	Credibly Proposed					500	1250	1250	1250	1250	900	
Borumba Upper Dams	Qld Hydro	Public	Wide Bay	3000	2400	Credibly Proposed					300	600	600	600	300		
Borumba Dam - Lower Dam	Qld Hydro	Public	Wide Bay	3000	2400	Credibly Proposed					300	600	600	600	300		
Wandoan South Solar Stage 2 (525 MW)	Vena Energy	Private	Darling Downs – Maranoa	775	388	Under Construction	103	195	111								
Dugald River Mine Wind Farm	APA Group	Private	Outback	150	100	Under Procurement		33	34	36							
Theodore Wind Farm Stage 1	RWE Renewables	Private	Fitzroy	800	500	Under Procurement		128	134	134	103						
Capricorn Energy Pumped Hydro	Copenhagen Infrastructure Fund	Private	Mackay – Isaac – Whitsunday	3000	2500	Under Procurement				300	750	750	700				
Mt Rawdon Pumped Hydro	Evolution Mining & ICA Partners	Private	Wide Bay	1500	1000	Credibly Proposed					200	200	200	200	200		
Brigalow Gas Peaking Plant	CS Energy Limited	Public	Darling Downs – Maranoa	1000	430	Under Construction	42	100	200	130							
Boulder Creek Wind Farm	CS Energy Limited	Public	Fitzroy	740	429	Under Construction	107	112	112								
Lotus Creek Wind Farm	CS Energy Limited	Public	Mackay – Isaac – Whitsunday	1300	754	Under Construction	189	198	198								
SuperGrid Stage 1	Powerlink Queensland	Public	Wide Bay	3300	1915	Prospective								383	401	401	401
Broadsound Solar PV	Iberdrola Australia	Private	Fitzroy	518	301	Under Construction	100	105									
Ulinda Park BESS Battery	Akaysha Energy	Private	Darling Downs – Maranoa	150	87	Under Construction	43	45									
Blue Grass BESS, Battery	X-ELIO	Private	Darling Downs – Maranoa	200	116	Under Construction	58	61									
Bundaberg solar farm (Naturgy)	Global Power Generation (GPG)	Private	Wide Bay	130	75	Under Construction	38	40									
Tarong Battery Energy Storage System	Stanwell Corporation	Public	Wide Bay	750	420	Under Construction	210										
Renewable Energy Zone Transmission (Far North Queensland)	Powerlink Queensland	Public	Cairns	900	504	Under Procurement			50	202	212	50					

ELECTRICITY

Product Description	Sponsor	Type of funding	Agg. Region	Total Value ($m)	Eng Value ($m)	Status	25/26	26/27	27/28	28/29	29/30	30/31	31/32	32/33	33/34	34/35	35/36
Renewable Energy Zone Transmission (Western Downs)	Powerlink Queensland	Public	Darling Downs – Maranoa	1600	895	Under Construction		45	269	269	269	45					
Renewable Energy Zone Transmission (Southern Downs)	Powerlink Queensland	Public	Darling Downs – Maranoa	900	504	Credibly Proposed			50	202	212	50					
Goombi Wind Farm	Squadron Energy	Private	Darling Downs – Maranoa	1200	671	Credibly Proposed			134	268	268						
Euleilah Solar Farm & BESS	X-ELIO Australia	Private	Fitzroy	700	392	Credibly Proposed			196	196							
Gladstone Project Stage 1 (Transmission Line Reinforcement)	Powerlink Queensland	Public	Fitzroy	501	280	Under Construction		70	140	70							
Tangkam Battery Energy Storage System (BESS) Connection Project	Powerlink Queensland	Public	Outback	120	67	Under Procurement			34	34							
Central QLD Gas-Fired Generation Power Station	Queensland Government	Public	Fitzroy	800	448	Announced			90	188	170						
Coal Mine Methane Power Expansion (Centurion Mine)	Centurion Coal Mining Pty Ltd (Peabody Energy Australia)	Private	Mackay – Isaac – Whitsunday	75	64	Credibly Proposed			32	32							
Lockyer Energy Project (Gas-Fired Firming Capacity)	Lockyer Energy Pty Ltd	Private	Ipswich – Toowoomba – Logan	450	383	Credibly Proposed			77	153	153						
Advanced Resource Recovery Centre (Gold Coast W2E)	Gold Coast City Council	Public	Gold Coast	1200	1000	Credibly Proposed				250	250	250	250				
Dingo Solar Farm 85MW	ESCO Pacific	Private	Fitzroy	140	49	Announced	25										
Wambo Wind Farm - Stage 1 and 2	Cubico / Stanwell	Private	Darling Downs – Maranoa	456	273	Under Construction	65										
Swanbank Battery Storage	CleanCo	Public	Brisbane	330	191	Under Construction	64										
Tarong Battery	Stanwell	Public	Wide Bay	514	298	Under Construction	99										
Supernode Battery	Quinbrook Infrastructure Partners	Private	Brisbane	722	419	Under Construction	210	10									
Western Downs Battery- Stage 1	Neoen	Private	Darling Downs – Maranoa	325	189	Under Construction	94	45									
Gunsynd Solar Farm	Metis Energy	Private	Darling Downs – Maranoa	160	93	Under Construction	46	5									
Kidston Pumped Hydro Storage Project	Genex Power	Private	Outback	777	544	Under Construction	150	100									
Koberinga Solar Farm 55MW	OX2 Australia	Private	Townsville	90	32	Unlikely								16	16		

PIPELINES

Product Description	Sponsor	Type of funding	Agg. Region	Total Value ($m)	Eng Value ($m)	Status	25/26	26/27	27/28	28/29	29/30	30/31	31/32	32/33	33/34	34/35	35/36
Arrow Bowen Pipeline	Shell/Arrow/Bow	Private	Mackay – Isaac – Whitsunday	450	360	Prospective				172	215						
Northern Gas Pipeline Extension/Expansion (QLD Component)	Jemena / Galilee Energy	Private	Outback	3800	2848	Credibly Proposed			472	806	806	763					
Galilee Gas Pipeline	Jemena	Private	Mackay – Isaac – Whitsunday	600	426	Announced			112	112	112	112					
Glenaras to Cooladdi pipeline	APA	Private	Outback	1500	1066	Announced			279	279	279	279					

TELECOMMUNICATIONS

Product Description	Sponsor	Type of funding	Agg. Region	Total Value ($m)	Eng Value ($m)	Status	25/26	26/27	27/28	28/29	29/30	30/31	31/32	32/33	33/34	34/35	35/36
HyperOne Network - QLD	HyperOne	Private	Multi-Region	280	168	Prospective				40	68	60					
PsiQuantum	PsiQuantum	Private	Multi-Region	940	685	Under construction	114	210	210	151							
NBN Fibre Upgrade Program (Queensland packages)	NBN Co Limited	Public	Multi-Region	1250	911	Announced		91	364	364	91						
Residential Activation Fund (RAF) — Telecoms Infill Program	Queensland Department of State Development, Infrastructure and Planning (DSDIP)	Public	Multi-Region	200	146	Under construction		15	58	58	15						
Sunshine Coast International Broadband Network Expansion	Sunshine Coast Council	Public	Sunshine Coast	250	179	Under Construction		36	72	72							
Regional Connectivity Program Round 3 Projects	NBN Co, Telstra, Optus, local governments and regional telecommunications providers	Public	Multi-Region	140	100	Under Construction		20	40	40							
Regional Mobile Black Spot Program (new Queensland sites)	Telstra, Optus and TPG Telecom (successful funding recipients)	Public	Multi-Region	180	129	Under Construction		26	52	52							
National Broadband Network - Qld component	NBN Co.	Public	Multi-Region	9352	6878	Under Construction	67										
Telstra Intercity Dark Fibre Network - QLD	Telstra	Private	Multi-Region	225	135	Under Construction	15										

OIL & GAS

Product Description	Sponsor	Type of funding	Agg. Region	Total Value ($m)	Eng Value ($m)	Status	25/26	26/27	27/28	28/29	29/30	30/31	31/32	32/33	33/34	34/35	35/36
Queensland Curtis LNG Upstream Field Development (Sustaining)- on going	QGC & Shell	Private	Fitzroy	2200	2000	Under Construction	154	161	161								
Australia Pacific LNG Upstream Field Development (Sustaining)- on going	Origin/Conoco Phillips	Private	Darling Downs – Maranoa	2200	2000	Under Construction	154	161	161								
Gladstone LNG Upstream Field Development (Sustaining)- on going	Santos & Petronas	Private	Fitzroy	1540	1400	Under Construction	103	108	108								
Mahalo gas project	Comet Ridge	Private	Fitzroy	160	112	Prospective				63	56						
Arcadia Valley CSG Development	Santos & Petronas	Private	Darling Downs – Maranoa	1000	600	Credibly Proposed			215	215	215						
Australia Pacific LNG Salt Handling Facility	Origin/ConocoPhillips	Private	Outback	200	160	Unlikely						43	86	43			
Atlas (Stage 3)	Senex Energy	Private	Darling Downs – Maranoa	200	169	Under Construction	34	36	36	36							
Bowen Gas Project	Arrow Energy	Private	Fitzroy	1000	847	Announced	212	222	222	222							
Surat Gas Project (Phases 2-5)	Arrow Energy	Private	Darling Downs – Maranoa	8000	6779	Under Procurement	715	749	749	749	749	749	749	749	749		
Peabody Centurion Mine Gas LNG Facility	Clean Energy Fuels Australia Marketing Pty Ltd	Private	Mackay – Isaac – Whitsunday	120	102	Credibly Proposed				51	51						
Additional Cooper–Eromanga Basin gas appraisal programs	Santos Ltd	Private	Multi-Region	500	425	Under Construction		85	170	170							
The Taroom Trough Appraisal & Drilling Campaign (Block PLR2025-1-9)	State Gas Limited	Private	Mackay – Isaac – Whitsunday	180	153	Under Construction		77	77								
Mahalo Gas Project (Consolidated Commercial Phase)	Comet Ridge Limited	Private	Mackay – Isaac – Whitsunday	1100	936	Credibly Proposed			187	374	374						
Green Methanol	Cement Australia, Mitsubishi Gas Chemical Company	Private	Townsville	150	82	Credibly Proposed			28	28	28						
Ampol – Brisbane Renewable Fuels	Ampol	Private	Brisbane	2500	2119	Credibly Proposed			555	555	555	555					
Australia Pacific LNG – Gas Supply Security Project	Australia Pacific	Private	Mackay – Isaac – Whitsunday	3000	2132	Under construction		237	237	237	237	237	237	237	237	237	



COAL

Product Description	Sponsor	Type of funding	Agg. Region	Total Value ($m)	Eng Value ($m)	Status	25/26	26/27	27/28	28/29	29/30	30/31	31/32	32/33	33/34	34/35	35/36
Winchester South	Whitehaven Coal	Private	Mackay – Isaac – Whitsunday	1000	900	Credibly Proposed	359	484	108								
Eagle Downs Coking Coal	South 32 / Stanmore	Private	Mackay – Isaac – Whitsunday	1250	600	Prospective				169	245	231					
Peak Downs Expansion	BHP Billiton / Mitsubishi Alliance (BMA)	Private	Mackay – Isaac – Whitsunday	460	345	Announced			86	172	113						
Lake Vermont (Underground)	Jellinbah Resources	Private	Mackay – Isaac – Whitsunday	320	300	Announced			108	108	108						
Carborough Downs metallurgical coal mine extension	Fitzroy Australia	Private	Mackay – Isaac – Whitsunday	350	263	Credibly Proposed	136	140									
Lake Lindsay mine expansion	Anglo American	Private	Fitzroy	400	280	Prospective				151	151						
Gemini Coal Project	Magnetic South	Private	Mackay – Isaac – Whitsunday	250	200	Prospective				72	96	48					
Isaac River Coal Mine Project	Bowen Choking Coal	Private	Mackay – Isaac – Whitsunday	250	200	Credibly Proposed	51	81	81								
Colton Coal Mine	New Hope Corporation	Private	Wide Bay	300	180	Prospective				71	123	0					
Baralaba South Open Cut	The Mount Ramsay Coal Company (Liberty Mutual)	Private	Outback	200	160	Credibly Proposed	82	86									
Yarrabee	Yancoal	Private	Fitzroy	260	150	Unlikely						81	81				
Vulcan Coal Mine	Vitrinite	Private	Mackay – Isaac – Whitsunday	250	100	Prospective				54	54						
Saraji East	BHP Billiton / Mitsubishi Alliance (BMA)	Private	Mackay – Isaac – Whitsunday	2400	1800	Announced		316	500	500	484						
Eaglefield Coal Mine Expansion	Peabody	Private	Mackay – Isaac – Whitsunday	1500	1200	Unlikely							269	376	344	301	
Blackwater South	Whitehaven Coal	Private	Fitzroy	1000	729	Credibly Proposed					50	170	170	170	170		
Dysart East	Bengal Energy	Private	Mackay – Isaac – Whitsunday	200	146	Credibly Proposed					15	30	30	40	31		
East Olive Downs South Extended/Willunga	Pembroke Resources	Private	Mackay – Isaac – Whitsunday	980	714	Announced			50	125	125	150	150	114			
Hillalong	Shandong Energy Group	Private	Mackay – Isaac – Whitsunday	500	364	Credibly Proposed				86	86	106	86				
Lancewood (formerly Wards Well)	Stanmore SMC	Private	Mackay – Isaac – Whitsunday	1500	1093	Credibly Proposed				253	280	280	280				
Moranbah South	Anglo American and Exxaro Resources Limited	Private	Mackay – Isaac – Whitsunday	2000	1458	Credibly Proposed						158	400	450	450		
Rolleston (phase 2)	Glencore, Sumisho, IRCA	Private	Fitzroy	400	292	Announced				50	75	82	85				
Centurion North	Peabody	Private	Mackay – Isaac – Whitsunday	662	482	Announced			24	145	145	145	24				
Centurion South	Peabody	Private	Mackay – Isaac – Whitsunday	736	536	Under construction	121	121									
Meandu Thermal Coal Mine Life Extension	Stanwell Power Co	Private	Wide Bay	150	109	Announced		22	44	44							
Hail Creek Mine Extension Pit Project	Glencore, Sumisho, IRCA	Private	Mackay – Isaac – Whitsunday	175	127	Announced			25	51	51						
Corvus Metallurgical Coal Project	Corvus Metallurgical Coal Project	Private	Fitzroy	1240	902	Announced				77	275	275	275				
Olive Downs Coal Mine	Pembroke Resources	Private	Mackay – Isaac – Whitsunday	1200	960	Under Construction	246										
Drake Coal	Qcoal	Private	Mackay – Isaac – Whitsunday	900	690	Under Construction	82										
Hail Creek Extension - Underground	Glencore	Private	Mackay – Isaac – Whitsunday	1100	660	Under Construction	154										
New Acland Stage 3 project	New Hope Corporation	Private	Mackay – Isaac – Whitsunday	556	445	Under Construction	103										
Grosvenor Underground Stage 2	Anglo Coal	Private	Mackay – Isaac – Whitsunday	500	350	Under Construction	87										



OTHER MINERALS & HEAVY INDUSTRY

Product Description	Sponsor	Type of funding	Agg. Region	Total Value ($m)	Eng Value ($m)	Status	25/26	26/27	27/28	28/29	29/30	30/31	31/32	32/33	33/34	34/35	35/36
Paradise Phosphate South project	Phosphate International	Private	Outback	300	225	Announced			65	90	70						
Gladstone Energy and Ammonia Project	Australian Future Energy	Private	Fitzroy	1000	600	Prospective				215	215	215					
Eva Copper Project	Harmony Gold Mining	Private	Outback	836	502	Under construction		100	202	200							
SCONI Scandium Project (Phase 1)	Australian Mines	Private	Townsville	1014	304	Prospective				90	139	75					
Townsville Energy Chemicals Hub (TECH) Project	Queensland Pacific Metals	Private	Townsville	2100	1500	Credibly Proposed			100	300	300	300	300	200			
Collinville Green Energy Hub	Ark Energy	Private	Mackay – Isaac – Whitsunday	7500	4750	Credibly Proposed			500	1000	1250	1250	750				
Agripower Amorphous Silica - Stage 2 Development	Agripower Australia Ltd	Private	Townsville	2000	1600	Unlikely						400	800	400			
Charters Towers Gold Mine	Citigold Corporation	Private	Townsville	246	135	Prospective				38	76	22					
Hydrogen-equipment manufacturing facility - Stage 2	Fortescue	Private	Fitzroy	885	620	Unlikely								111	333	222	
Julia Ck Vanadium Project	QEM	Private	Outback	242	109	Credibly Proposed			25	54	30						
Northern Silica Project	Diatreme Resources Ltd	Private	Outback	535	356	Credibly Proposed			56	100	100	100					
Mt Dromedary - Graphite Project	Novonix	Private	Outback	100	80	Unlikely								40	40		
Alpha HPA Project - Stage Two	Alpha HPA	Private	Fitzroy	699	550	Under construction	150	200	100								
Richmond – Julia Creek Vanadium	Richmond Vanadium Technology Pty Ltd	Private	Outback	512	320	Credibly Proposed			75	90	80	75					
Julia Creek Project	QEM Limited	Private	Outback	791	433	Prospective			130	152	151						
Lindfield Vanadium Project	Critical Minerals Group	Private	Outback	400	220	Prospective			25	65	65	65					
Vecco Critical Minerals Project (Stage 1)	Vecco	Private	Outback	606	332	Prospective			75	85	87	85					
Sugarbag Hill UHPQS Project	High Purity Quartz Ltd	Private	Townsville	350	301	Credibly Proposed			60	120	120						
Esmeralda Graphite mine (Phase 1)	Qld Aus Graphite Ltd	Private	Townsville	316	186	Credibly Proposed			19	74	74	19					
Esmeralda Graphite mine (Phase 2)	Qld Aus Graphite Ltd	Private	Townsville	349	204	Credibly Proposed					20	82	82	20			
Gladstone Industrial Transformation Program	Rio Tinto	Private	Fitzroy	273	159	Announced			8	48	48	48	8				
St Elmo Vanadium Project	Multicom Resources	Private	Outback	500	292	Under Construction	58	117	117								
Lava Blue HPA	Lava Blue Ltd	Private	Townsville	82	48	Credibly Proposed				24	24						
White Range Project	Fetch Metals Pty Ltd	Private	Outback	135	79	Credibly Proposed				40	40						
VSPC Advanced Cathode Project	Livium Ltd	Private	Brisbane	515	301	Prospective						150	151				
Alpha HPA Project - Stage One	Alpha HPA	Private	Fitzroy	308	40	Under Construction	10										
Critical Minerals Processing Facility	Qld Government	Public	Townsville	75	15	Under Construction	9										
Cape Flattery Silica Sand Project	Metallica Minerals Ltd	Private	Outback	80	10	Under Construction	3										
H2-Hub Gladstone green hydrogen and ammonia production facility	Hydrogen Utility (H2U)	Private	Fitzroy	4700	2585	Prospective				800	1300	485					

2032 GAMES

Product Description	Sponsor	Type of funding	Agg. Region	Total Value ($m)	Eng Value ($m)	Status	25/26	26/27	27/28	28/29	29/30	30/31	31/32	32/33	33/34	34/35	35/36
Brisbane Stadium & Vic Park Development	GIICA	Public	Brisbane	3500	2900	Under construction		100	750	750	750	550					
Brisbane Aquatic Centre	GIICA	Public	Brisbane	1100	920	Under Procurement		50	250	275	275	70					
Minor Venues Program		Public	Statewide	2500	1896			30	469	773	526	96					
Redlands White Water Centre	GIICA	Public	Brisbane			Announced											
Moreton Bay Indoor Centre	GIICA	Public	Brisbane			Announced											
Logan Indoor Centre	GIICA	Public	Brisbane			Announced											
QLD Tennis Centre Upgrade	GIICA	Public	Brisbane			Announced											
Toowoomba Showgrounds Upgrade	GIICA	Public	Ipswich – Toowoomba – Logan			Announced											
Chandler Para Sport Facility Upgrade	GIICA	Public	Brisbane			Announced											
Sunshine Coast Football Stadium	GIICA	Public	Sunshine Coast			Announced											
Barlow Park Upgrade	GIICA	Public	Cairns			Under Procurement											
Gold Coast Hockey Facility	GIICA	Public	Gold Coast			Announced											
Rockhampton Rowing Facility	GIICA	Public	Fitzroy			Announced											
Sunshine Coast Mountain Bike Facility	GIICA	Public	Sunshine Coast			Announced											
Villages & Arenas Program		Public & Private	Gold Coast, Brisbane, Sunshine Coast & Fitzroy	7000	6233			200	991	1442	1592	1591	418				
Brisbane Athletes Village	Leand Lease & Qld Government	Private	Brisbane			Under Procurement											
Gold Coast Athletes Village	Qld Government	Public	Gold Coast			Under Procurement											
Gold Coast Arena	Gold Coast City Council	Public	Gold Coast			Under Procurement											
Brisbane Arena	Private Proponents & Qld Government	Private	Brisbane			Under Procurement											
Sunshine Coast Arena & Athlete Village	Sunshine Coast Council & Walker Corp	Private	Sunshine Coast			Announced											
Rockhampton Athlete Village	Qld Government	Public	Fitzroy			Announced											
Suncorp Stadium Upgrade	Qld Government	Public	Brisbane	300	219	Announced		110	110								
Games Temporary Infrastructure Overlay	BOCOG	Public	Brisbane	2500	1884	Announced					250	500	734	400			

Notes:

The Queensland Government has set aside a $3.5b contribution to the Villages and Arenas Program. This Program is predominantly being privately financed and delivered.

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As at 30 June 2026, our Growth (MySuper) investment option returned 9.25% over 1 year. Our Growth (MySuper) option is a strong performer over the long term too. It has also delivered **average annual returns** of **6.48%** over 5 years, **8.13%** over 10 years and **8.52%** over 15 years[2].

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Over the past 3 years (to 30 June 2025), we've paid out **$1.1 billion in insurance benefits**[5]. Our 5 year claims acceptance rate ending 30 June 2025 is **99.6%** for Death, **95.8%** for Total and Permanent Disablement[6].

Our service

We provide on the ground support from CBUS experts. Our dedicated teams deliver tailored super education directly to workplaces.

Support that shows up

Our team of Senior Employer Engagement Managers can provide information or general advice about super. Organise a group session at your workplace, or a one-on-one chat.



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* All figures as at 30 June 2026 unless otherwise stated.

[1] The Growth (MySuper) investment option obtained a top quartile performance ranking over 10, 15 and 20 year periods from the SuperRatings FCRS SR50 Balanced (60-76) Index, for the period ending 30 June 2026. SuperRatings is a rating agency that collects information from super funds to enable performance comparisons – visit superratings.com.au for details of its rating criteria. Past performance is not a reliable indicator of future performance.

[2] As at 30 June 2026. The crediting rate is based on investment returns minus investment fees and costs, transaction costs and investment-related taxes and until 31 January 2020, the percentage-based administration fee. Excludes fees and costs that are deducted directly from member's account. Past performance is not a reliable indicator of future performance.

[3] Cbus Property Pty Ltd is a wholly-owned entity of United Super Pty Ltd, and is responsible for the development and management of a portfolio of CBUS Super' s property investments.

[4] Estimated jobs created through Cbus Property since 2006 to June 2025 based on inductions for completed and committed developments.

[5] Insurance is issued under a group policy with our insurer TAL Life Limited ABN 70 050 109 450 AFSL 237848. The information in this insurance section provides a brief overview of the insurance types available through CBUS. It does not include all eligibility conditions for acceptance or payment of insurance benefits. For more information, we recommend you read the relevant Insurance guide for your membership.

[6] Source: https://www.apra.gov.au/news-and-publications/annual-fund-level-superannuation-statistics

This information is about CBUS Super. It doesn't account for your specific needs. Please consider your financial position, objectives and requirements before making financial decisions. Read the relevant Product Disclosure Statement (PDS) and Target Market Determination to decide if CBUS Super is right for you. Call 1300 361 784 or visit cbussuper.com.au. United Super Pty Ltd ABN 46 006 261 623 AFSL 233792 as Trustee for the Construction and Building Unions Superannuation Fund ABN 75 493 363 262 (CBUS and/or CBUS Super).

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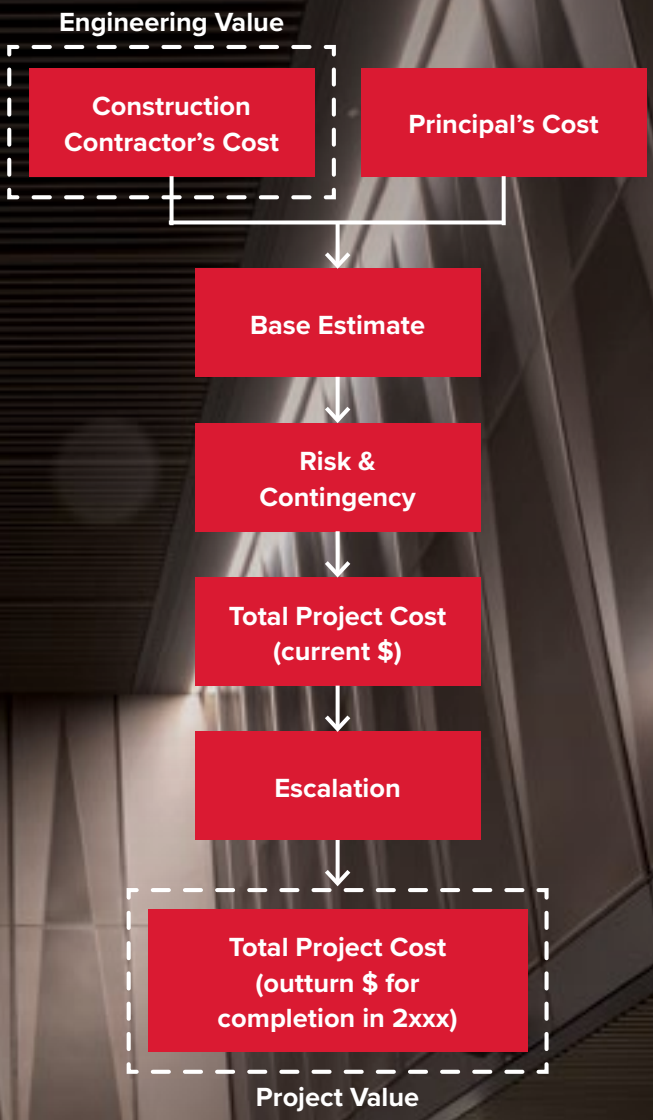
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The Pipeline: 2026 to 2031

The Queensland Major Projects Pipeline Report (QMPPR, the Report) gathers data from 371 projects (306 in the 2025 Report), each with an engineering construction value of $50m or greater, organised into 12 sectors and 11 regions.





Each project in the pipeline is separately assessed as either funded or unfunded and then assigned to one of six different project statuses:

FUNDED

ANNOUNCED
Projects which have funding support but have not yet entered the procurement stage. There are $27.2b across 71 projects in the announced pipeline.

UNDER PROCUREMENT
Projects in a procurement stage but have not yet started active on-site construction. There are $19.6b across 30 projects under procurement in the pipeline.

UNDER CONSTRUCTION
Projects in flight or currently under active construction. There are $35.7b across 132 projects currently under construction in the pipeline.

UNFUNDED

CREDIBLY PROPOSED
Projects that are supported by governments and/or the private sector but remain in prefeasibility or business case mode without committed funding. There are $40.9b across 82 projects in the credibly proposed pipeline.

PROSPECTIVE
Projects considered likely to occur over the next five years but not yet formally proposed. There are $15.5b across 47 projects in the prospective pipeline.

UNLIKELY
Projects considered highly unlikely to proceed in the next five years, even if previously announced. There are $524m across nine projects in the unlikely category.

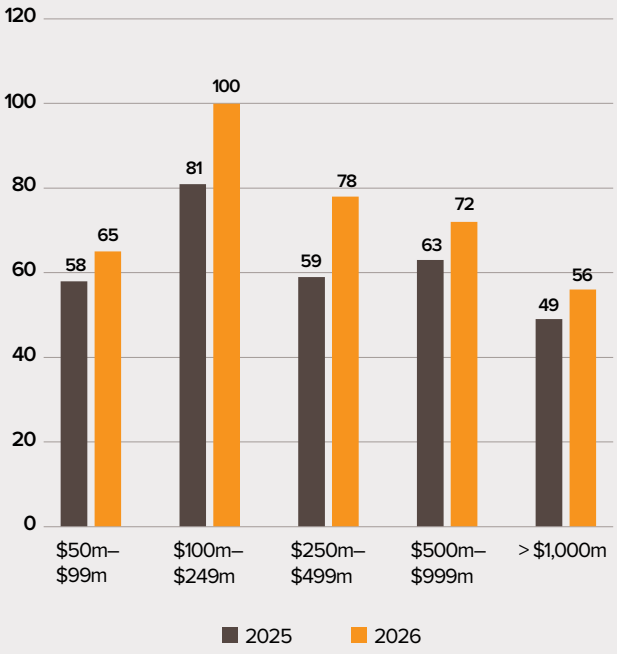
The funded forecast view is similar to a ‘worst case scenario’ outlook, should international developments or public sector finances deteriorate significantly or the combination of threats to the Queensland construction industry remain unaddressed. Maintaining a growing pipeline of major project work requires shifting currently unfunded projects into the funded category as well as incorporating new projects into the pipeline. While the most likely scenario for major project work excludes ‘unlikely’ projects, these are included to show their potential impact on major project work, particularly later in the forecast.

Size and scale of projects in this Report

The total number of projects expanded from 306 in the 2025 Report to 371 in the 2026 Report, representing a net increase of 65 projects. Over the same period, total pipeline value grew from $127.5b to $139.5b, showing a major expansion in capital allocation. However, analysing individual project size brackets reveals that this growth is heavily concentrated in middle-tier and upper- to middle-tier projects rather than mega-projects, causing the average project value across the entire pipeline to decline from $417m in 2025 to $376m in 2026.

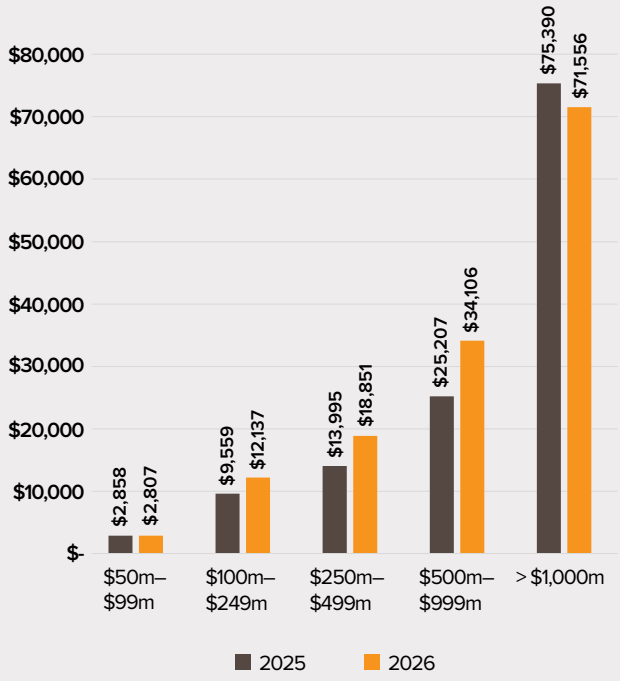
- **The smallest project tier ($50m to $99m)** experienced moderate growth in volume but a slight contraction in total value. Active projects in this bracket rose from 58 in 2025 to 65 in 2026, representing a 12% increase in project volume. Despite this volume growth, total value contracted by under 2% (decrease of $51m to $2.8b). Consequently, while this entry-level tier represents 17.5% of the project count, it accounts for a minor 2% of total pipeline value in 2026. This trend indicates a concentration of lower-value works that require significant local labour coordination but represent only a fraction of overall capital spending.
- The most rapid volume growth in the pipeline occurred in **the mid–high tier ($250m to $499m).** This bracket experienced a 32% surge in project count, rising from 59 projects in 2025 to 78 projects in 2026. Total capital committed to this bracket jumped by nearly 35%, expanding $4.9b to $18.9b. Representing 21% of all projects and over 13.5% of total pipeline value, this segment's rapid expansion is the primary driver behind medium-sized works entering the Queensland infrastructure market.
- **The large project tier ($500m to $999m)** experienced a major capital expansion. Project volume grew by over 14%, rising from 63 to 72 projects. Total value escalated by 35% ($8.9b) to $34.1b in 2026, representing a capital surge of over $8.8b. Because this bracket grew its share of total pipeline value to nearly 24.5% in 2026 while remaining under 20% of project count, it has become an increasingly significant focus of heavy civil engineering activity.
- In contrast, **the mega-project tier ($1,000m plus)** experienced a notable structural shift. Billion-dollar-plus projects in the pipeline increased by over 14%, rising from 49 in 2025 to 56 in 2026. However, total value contracted by 5% ($3.8b) to $71.6b. This reveals that while there are more mega-projects, their average size has shrunk, meaning extreme 'super-mega' projects declined in favour of smaller billion-dollar developments. Despite this contraction, mega-projects exert an overwhelming influence, commanding over 51% of total pipeline value across 15% of project count, driving intense demand for specialised engineering capacity and high-level project management resources.

QMPPR by size of project: number of projects



Source: QEAS, QMCA analysis

QMPPR by size of project: total pipeline size ($m)

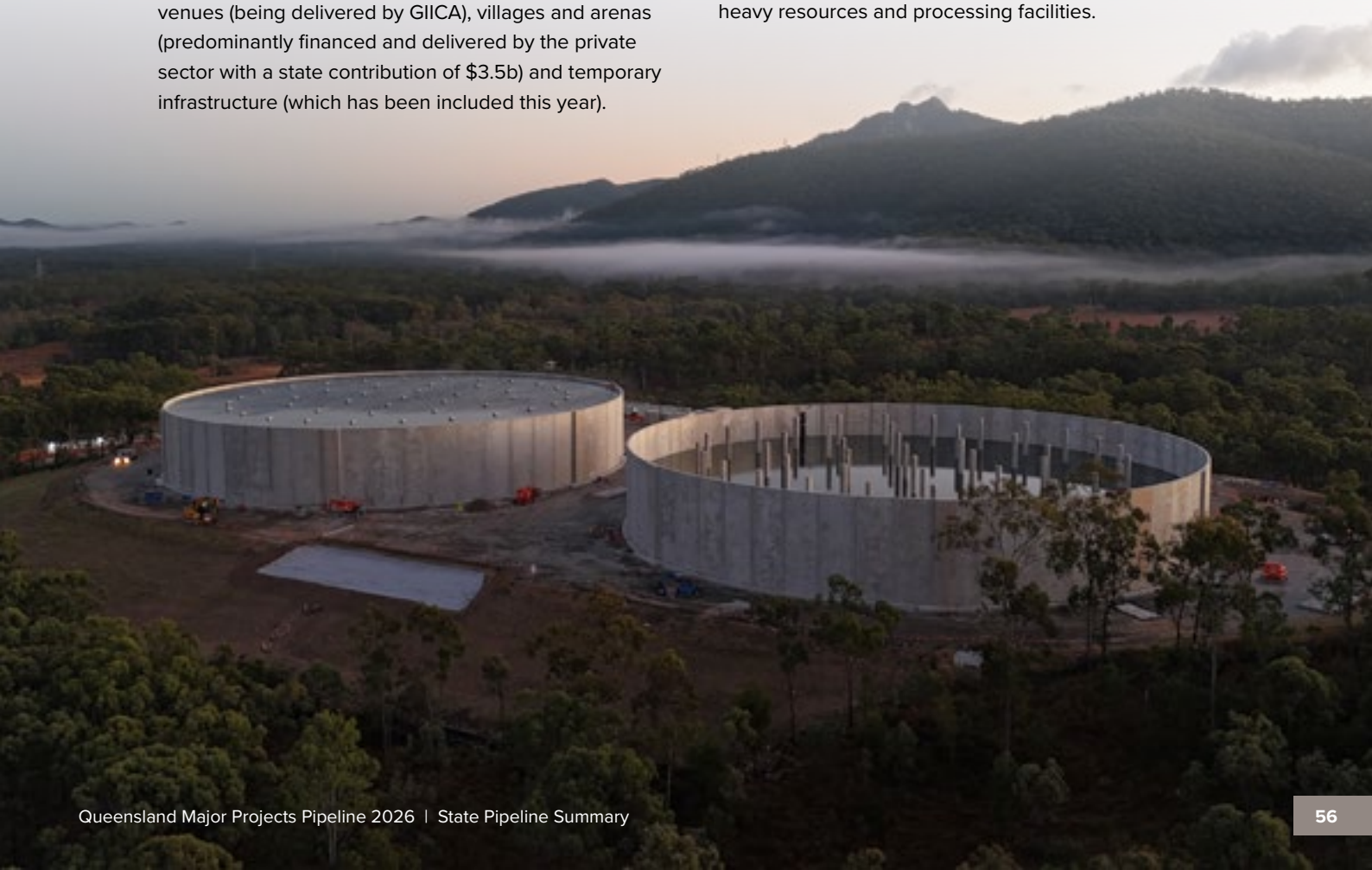


Source: QEAS, QMCA analysis

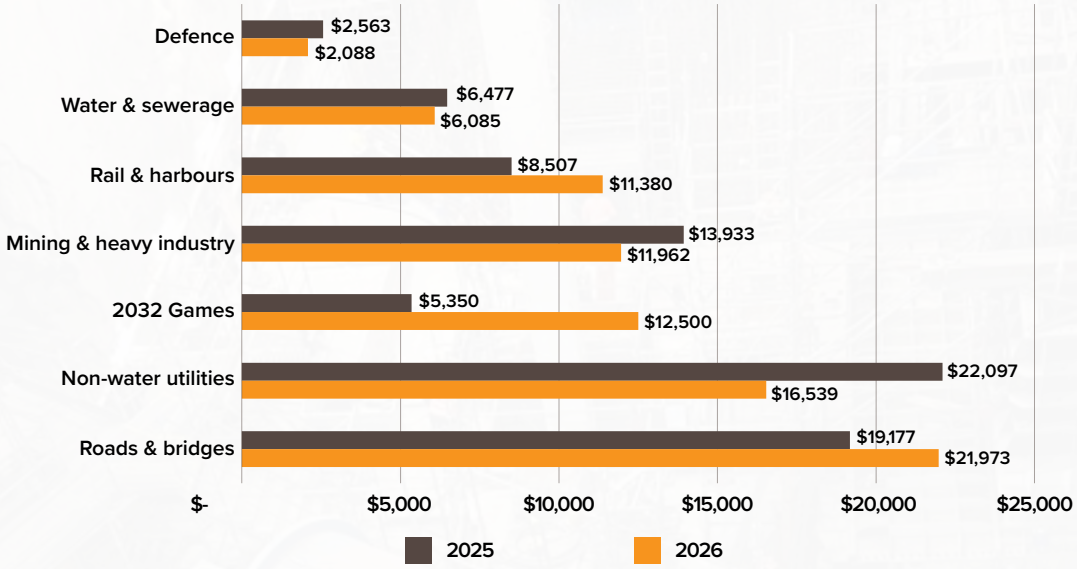
Types of major projects in this Report

Key points:

- Queensland's active infrastructure program is dominated by transport networks, social and sporting venues, and energy transition utilities, while traditional resource sector projects and heavy industrial assets represent a declining share of funded commitments.
- Transport infrastructure remains the absolute backbone of the state's capital works program. Roads and bridges constitute the single largest asset class in this Report, representing $21.9b (26.6%) of the total funded pipeline. This is an increase of +$2.8b (+14.6%) from the $19.2b projected in the 2025 Report, driven by major regional upgrades like the Bruce Highway Targeted Safety Program and the Rockhampton Ring Road.
- Similarly, railways and harbours represent a major growth sector, rising to $11.4b (13.8%) in the 2026 pipeline. This is a substantial expansion of +$2.9b (+33.8%) from the previous $8.b estimate, heavily supported by major new rail initiatives such as the Direct Sunshine Coast Line. Together, transport infrastructure accounts for more than 40% of all funded engineering work in the state.
- With the 2032 Games expenditure peaking in FY30 and substantial spending still expected in FY31, the social and civic infrastructure does show a significant expansion in volume of work in this year's pipeline. This represents a total of $12.5b across the forward five years of the pipeline, spread across the permanent venues (being delivered by GIICA), villages and arenas (predominantly financed and delivered by the private sector with a state contribution of $3.5b) and temporary infrastructure (which has been included this year).
- Conversely, the state's defence projects represent a much smaller and contracting asset class, standing at $2.1b (2.5%) in 2026. This is a decline of $475m (-18.5%) from the previous estimate of $2.6b, indicating a progressive wind-down of active works across key base upgrades and training areas, although there are longer term plans for significant base and training upgrades beyond the timeframe of this year's pipeline.
- Utilities and resources represent the remaining sectors of the major projects pipeline, characterised by a significant transition in energy assets and minor adjustments in water infrastructure.
- Non-water utilities comprising electricity transmission lines like CopperString, grid upgrades, telecommunications and gas pipelines collectively remain the second-largest sector in the pipeline at $16.5b (20%). However, this sector has experienced a contraction of -$6.3b of funded works from the 2025 Report's valuation of $22.8b, as several large-scale wind and solar projects remain uncommitted.
- Water and sewerage infrastructure also experienced a minor contraction in the funded works, falling slightly to $6.1b in the 2026 Report, down $392m (-6.1%) from $6.4b in 2025. Lastly, funded mining and heavy industry commitments fell to $11.96b (14.5%), a decrease of -$1.97b (-14.2%) from the previous year's $13.9b, highlighting a slower rate of capital commitment for heavy resources and processing facilities.

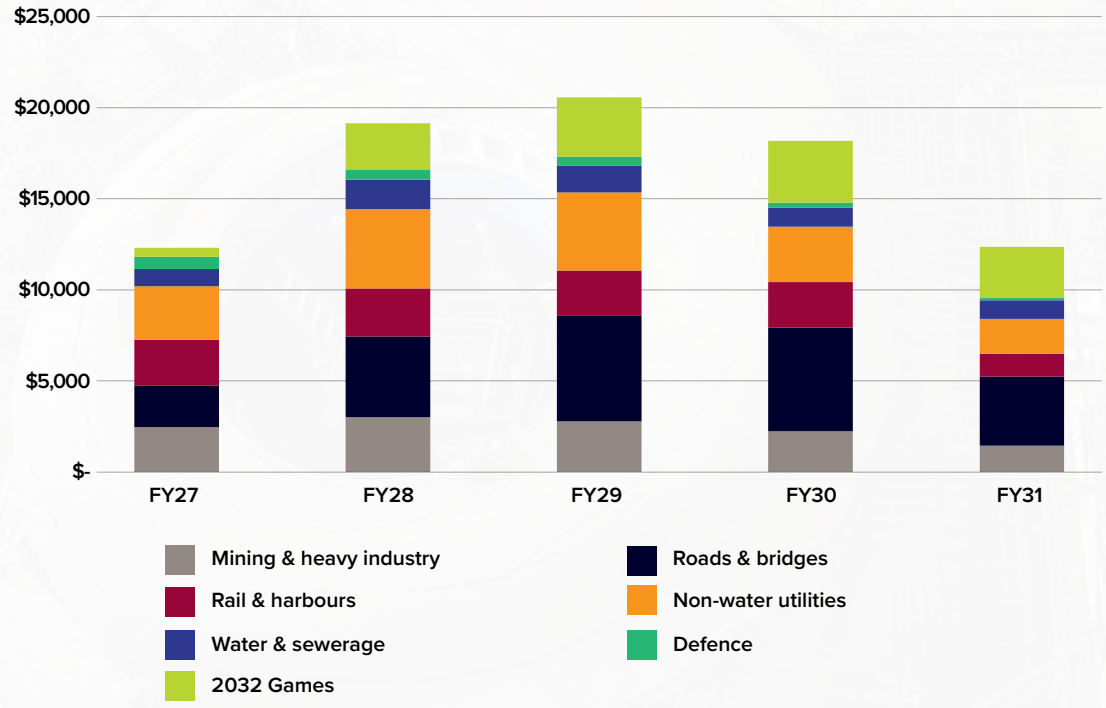


Funded major project outlook ($m) by sector: 2025 QMPPR v 2026 QMPPR



Source: QEAS, QMCA analysis

Funded major project work by sector ($m)



Source: QEAS, QMCA analysis



CSQ Labour and Skills Report [1]

Queensland is experiencing an unprecedented period of construction activity.

Unlike the previous construction boom, which was driven largely by investment in the resources sector, the current pipeline is more diverse. It includes projects across transport, water, electricity, mining, heavy industry, housing, and infrastructure for the 2032 Games.

The scale, diversity and geographic reach of the construction pipeline offer significant opportunities for industry, workers and other stakeholders to help shape Queensland's future.



[1] This section is an independent contribution from Construction Skills Queensland (CSQ). It presents the estimated labour requirements for delivering construction work for the QMPP (Queensland Major Project Pipeline) included in this report. The list of projects (which include engineering projects with engineering value above $50m and the 2032 Games venues and villages projects), provided by QMCA to CSQ for labour estimation, along with discussions on their additional attributes, can be found in other sections of the QMCA report. The CSQ section also offers an update on current construction activity, the labour market, and skilling initiatives in Queensland. The views and findings in the remainder of the QMCA report are not attributable to CSQ. For inquiries related to the CSQ section, please contact csq@csq.org.au.

Key insights from CSQ's Horizon 2032: Imagining Queensland's Future Construction Workforce Report

Realising the opportunities presented by Queensland's generational construction pipeline requires a clear understanding of the scale, timing and composition of the work ahead. CSQ's *Horizon 2032: Imagining Queensland's Future Construction Workforce report* provides a broad view of construction activity across the state, encompassing residential, non-residential and engineering work and the workforce needed to deliver it.

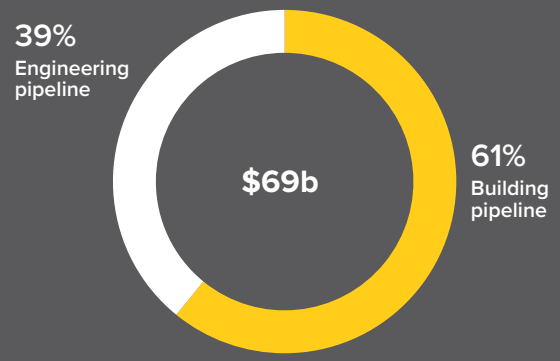
Population growth, the energy transition and preparations for the 2032 Olympic and Paralympic Games are driving construction demand across Queensland. The state's construction pipeline is forecast to average around $69b over the seven years to 2031/32, comprising 61% building work and 39% engineering work.

Delivering the pipeline is projected to require approximately 138,000 construction workers on average, with 72% supporting building projects and 28% engineering projects.

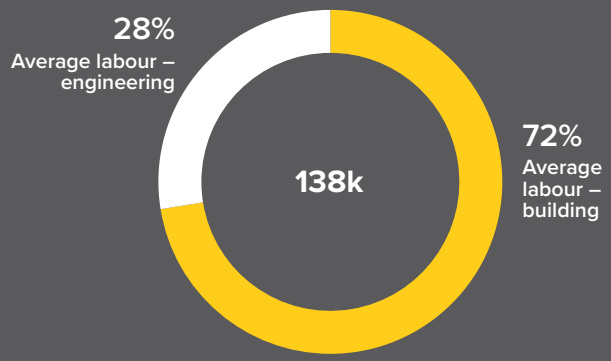
Activity will span both housing and major infrastructure, with residential construction comprising 62% of average building work and electricity, transport, mining and heavy industry collectively accounting for 81% of the average engineering pipeline.

Against this broader state outlook, the following analysis focuses on the construction labour required to deliver the QMPP and the 2032 Games project pipeline examined in this report.

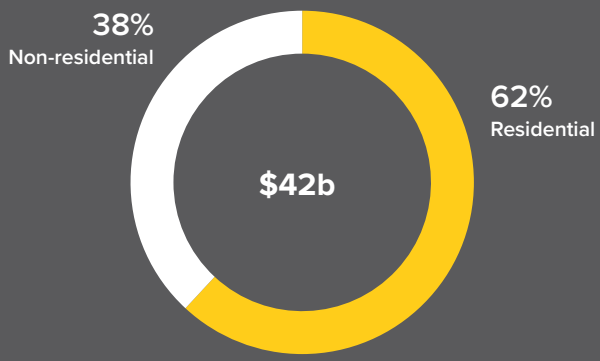
Construction pipeline (7-year average) by sector



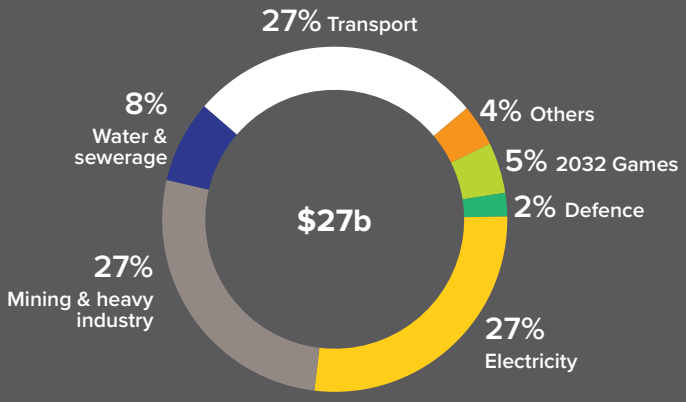
Labour requirement (7-year average) by sector



Building pipeline (7-year average) by sub-sector



Engineering pipeline (7-year average) by sub-sector



Source: CSQ (2026), Horizon 2032: Imagining Queensland's Future Construction Workforce

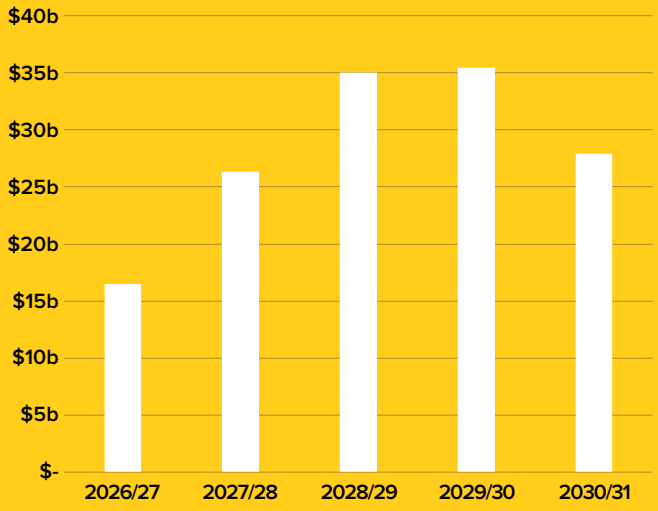
Notes: The full Horizon 2032 report (2026 edition), based on information available as of 19 December 2025, is available at www.csq.org.au. The labour requirements presented in this QMCA report are based on the QMPP (Queensland Major Projects Pipeline), which includes engineering projects with engineering values above $50m and the Brisbane 2032 Games venue and village projects, as provided by QMCA to CSQ on 19 August 2026. By contrast, the Horizon 2032 report covers the total construction pipeline, defined as all building work (residential and non-residential) and engineering work. All labour forecasts in both reports include only workers in construction-relevant occupations and exclude those not directly engaged in construction work.

Labour requirements for the QMPP and the 2032 Games pipeline

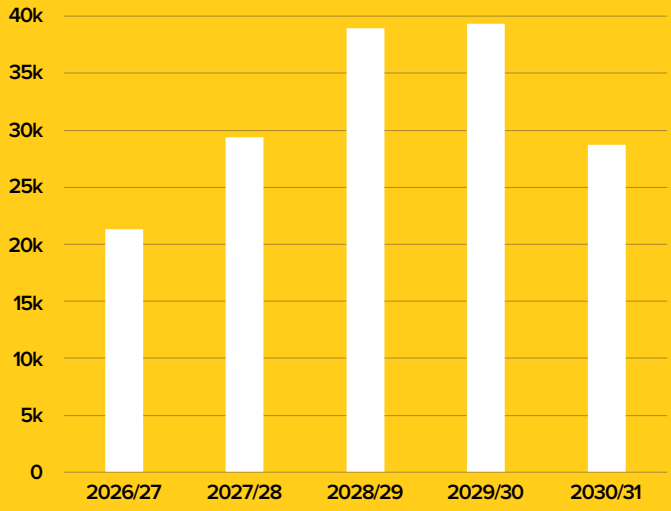
The QMPP and 2032 Games project pipeline examined in this Report is estimated to require an average of approximately 31,600 construction workers through to 2030/31. As the pipeline increases over the first four years, average labour demand is estimated to rise from around 21,400 workers in 2026/27 to a peak of approximately 39,400 in 2029/30, an increase of 84%.

The QMPP includes engineering projects with value above $50m and the 2032 Games venues and villages projects. The estimated average construction labour requirement for each financial year reflects the construction work planned for the pipeline in that year.

QMPP by financial year

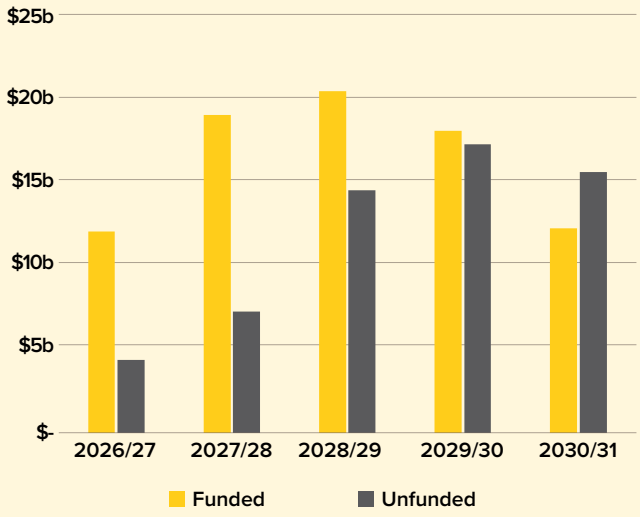


Average labour requirement by financial year

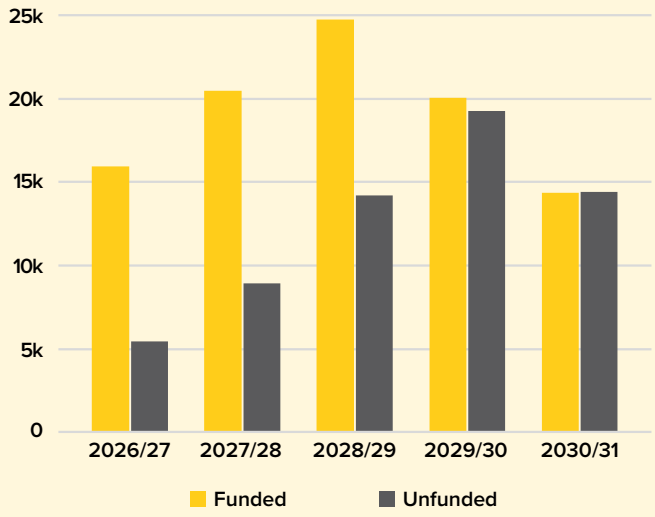


Source: CSQ for QMCA

QMPP by funding status



Average labour requirement by funding status

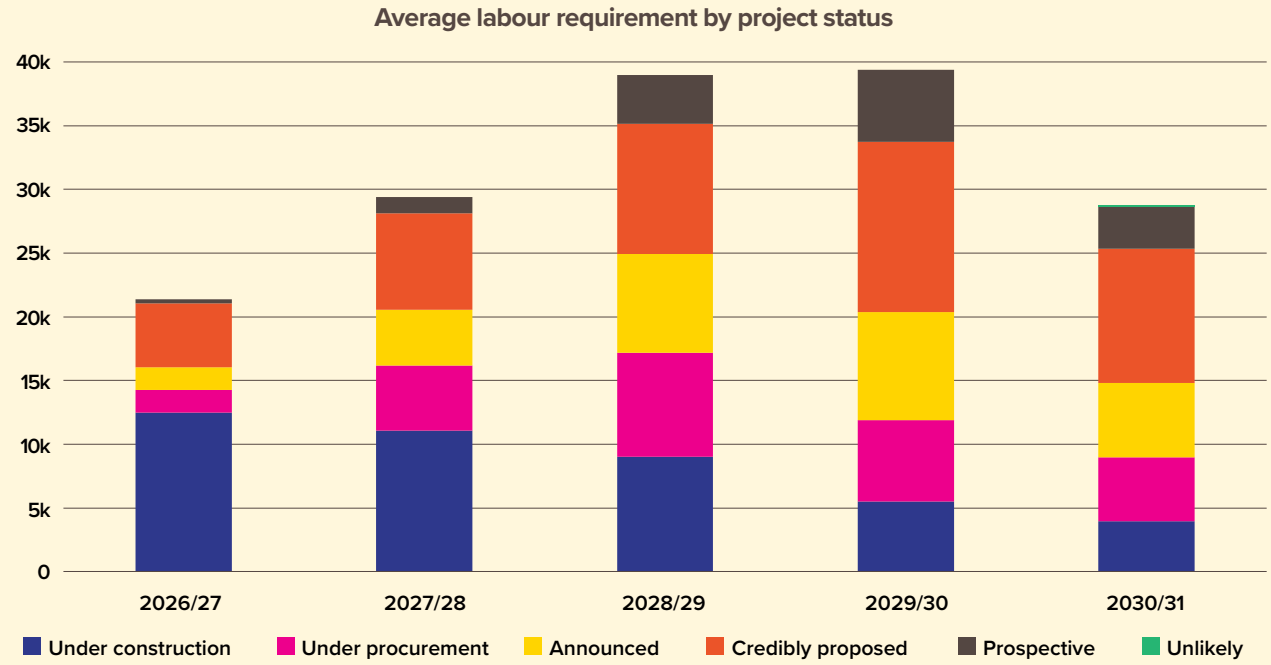


Source: CSQ for QMCA

Funded projects account for most of the pipeline in every year except 2030/31, supporting between 50% and 75% of average labour demand from 2026/27 to 2030/31. This provides a firm baseline of activity and greater certainty around future workforce requirements.

Average labour demand from funded projects is estimated to increase from approximately 16,000 workers in 2026/27 to a peak of around 24,800 in 2028/29. Unfunded projects are estimated to account for the remaining 25% to 50% of demand, peaking one year later at around 19,300 workers in 2029/30.

Funding status provides one measure of pipeline certainty. Project development status provides a complementary view of how close projects are to full delivery.



Source: CSQ for QMCA

From 2026/27 to 2028/29, projects already under construction or in procurement are estimated to account for between 44% and 67% of average labour demand. These advanced-stage projects provide a relatively firm pipeline of near-term work and greater certainty around workforce requirements.

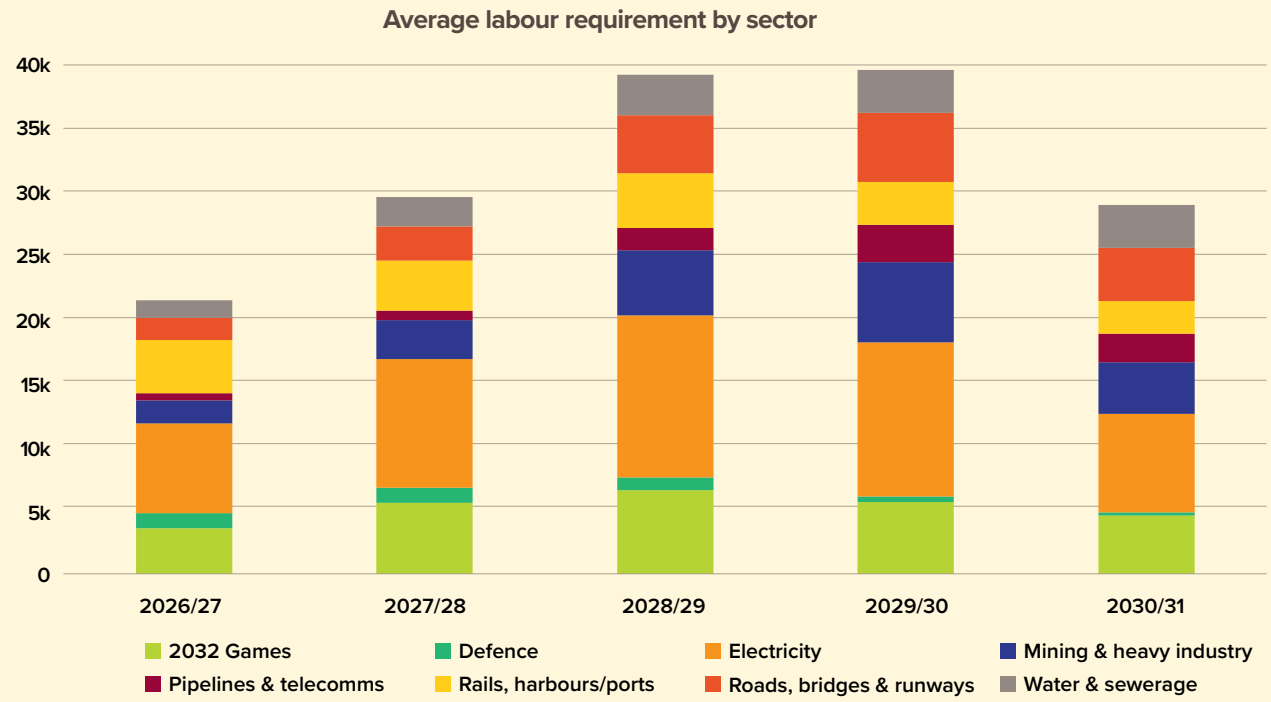
In 2026/27, projects under construction account for 58% of the estimated average labour demand, with a further 8% attributable to projects under procurement. Together, they account for around 67% of average labour demand, equivalent to approximately 14,300 workers.

In 2027/28, approximately 38% of the average labour demand is for projects under construction and 17% for projects under procurement; collectively representing 55% of demand, or around 16,200 workers.

In 2028/29, projects under construction or procurement account for around 44% of average labour demand, 23% and 21%, respectively. However, the larger overall pipeline this year lifts demand from these advanced-stage projects to a peak of approximately 17,200 workers.

From 2029/30, a greater share of estimated labour demand is for projects at earlier stages, including announced, credibly proposed, prospective, and unlikely projects.





Source: CSQ for QMCA

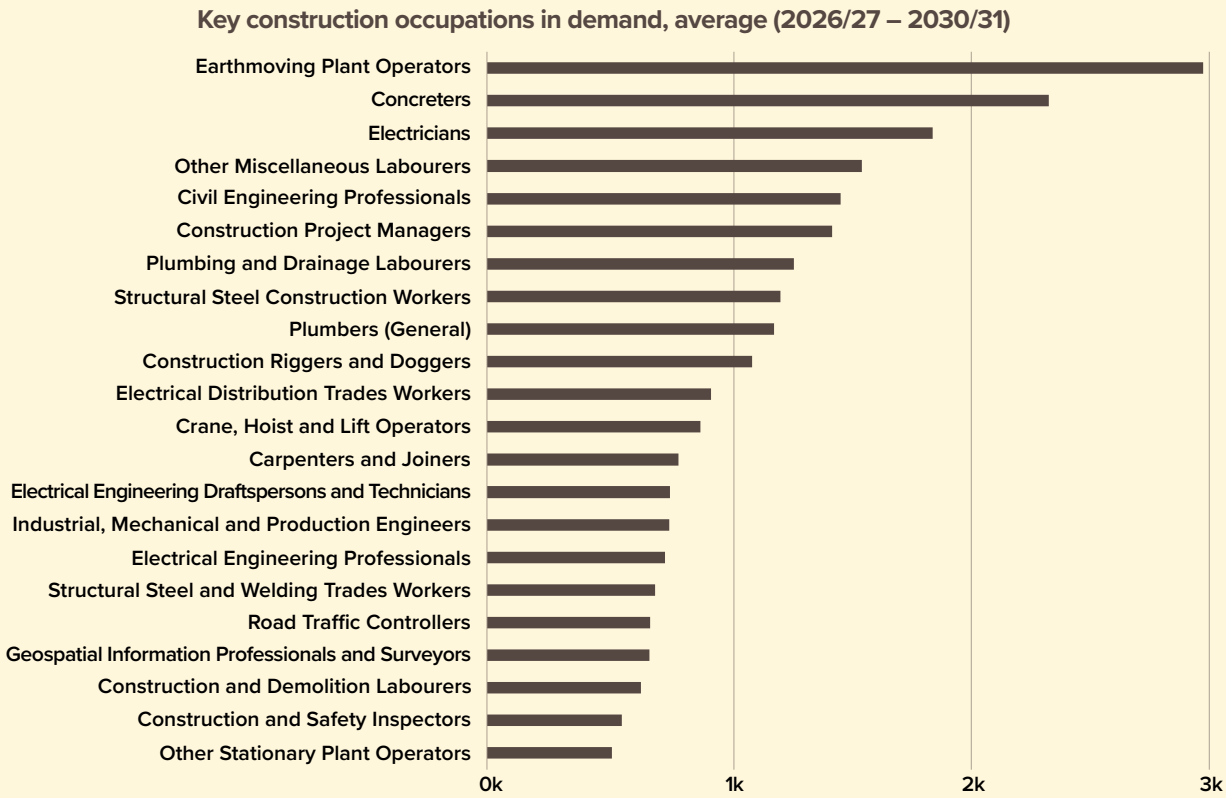
Several major infrastructure programs shape the labour profile, with electricity projects consistently accounting for the largest share of average labour demand over the five-year period.

Electricity projects are estimated to require an average of approximately 7,000 construction workers in 2026/27, representing around 33% of demand that year. Their share is expected to remain above 30% through to 2029/30 before easing to 27% in 2030/31. In absolute terms, demand is estimated to rise by 82% from 2026/27 to a peak of around 12,700 workers in 2028/29, remain above 12,000 in 2029/30, and then ease to approximately 7,700 in 2030/31.

Transport infrastructure is also a key driver of labour demand. Roads, bridges and runways, and rail, harbours and ports are estimated to collectively account for around 28% of average labour demand in 2026/27, equivalent to approximately 5,900 construction workers. Together, these subsectors are expected to account for more than 20% of average labour demand in each of the remaining four years.

The 2032 Games and mining and heavy industry projects add a further layer of demand. The 2032 Games pipeline is estimated to require an average of between 3,600 and 6,600 workers across the five years, accounting for 14% to 19% of average labour demand. Mining and heavy industry projects account for 9% to 16% of average labour demand over the review period, with demand peaking at approximately 6,300 workers in 2029/30.





Source: CSQ for QMCA

The pipeline is estimated to generate demand across a broad range of construction occupations. Earthmoving plant operators are estimated to have the greatest demand, reaching nearly 3,000 workers on average within the five years, followed by concreters at just above 2,300. Electricians, other miscellaneous labourers, civil engineering professionals and construction project managers are also estimated to be in relatively high demand, with average demand exceeding 1,400 workers over the review period.

Regional labour requirements

Strong construction labour demand is expected across Queensland; however, its scale and composition vary by region, reflecting differences in the location and mix of major projects. Brisbane is estimated to record the highest average labour demand over the five-year period, driven by the concentration of 2032 Games infrastructure and major transport projects. Fitzroy is also expected to require a sizeable workforce, supported by investment in electricity, mining and heavy industry.

Brisbane is estimated to require an average of approximately 7,000 workers, with funded projects accounting for around 81% of demand and unfunded projects the remaining 19%[2]. The 2032 Games pipeline and transport infrastructure are the principal drivers[3]. Games-related projects account for approximately 52% of Brisbane's average labour demand, followed by roads, bridges and runways at 23%, and rail, harbour and port projects at 11%.

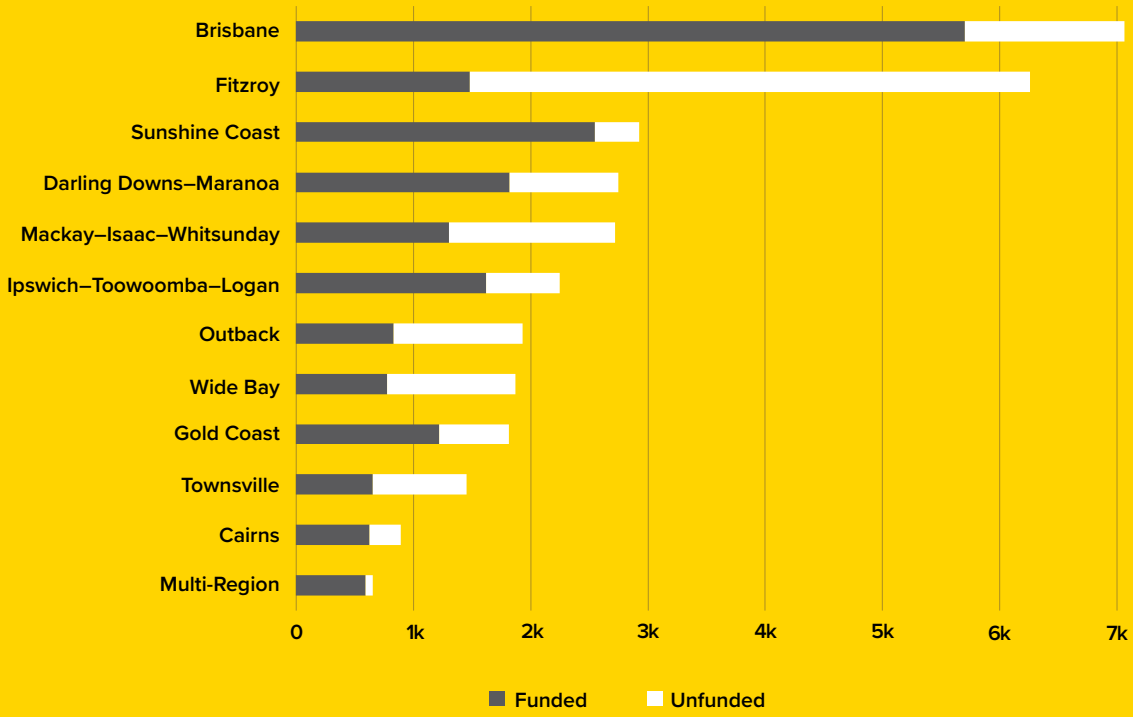
Fitzroy records the second highest average labour requirement, estimated at approximately 6,200 workers. Unfunded projects account for around 76% of this demand, while funded projects contribute 24%. Electricity projects are the dominant driver, representing 75% of the region's average labour demand, followed by mining and heavy industry at 13%.

The Sunshine Coast, Darling Downs–Maranoa and Mackay–Isaac–Whitsunday have broadly similar workforce requirements, of between 2,700 and 2,900 workers on average. On the Sunshine Coast, demand is largely driven by transport and 2032 Games-related infrastructure. In Darling Downs–Maranoa and Mackay–Isaac–Whitsunday, electricity, mining and heavy industry projects are the primary sources of labour demand.

[2]The averages are calculated over each project's scheduled delivery period within 2026/27 – 2030/31; regional periods without selected funding types are excluded from these averages.

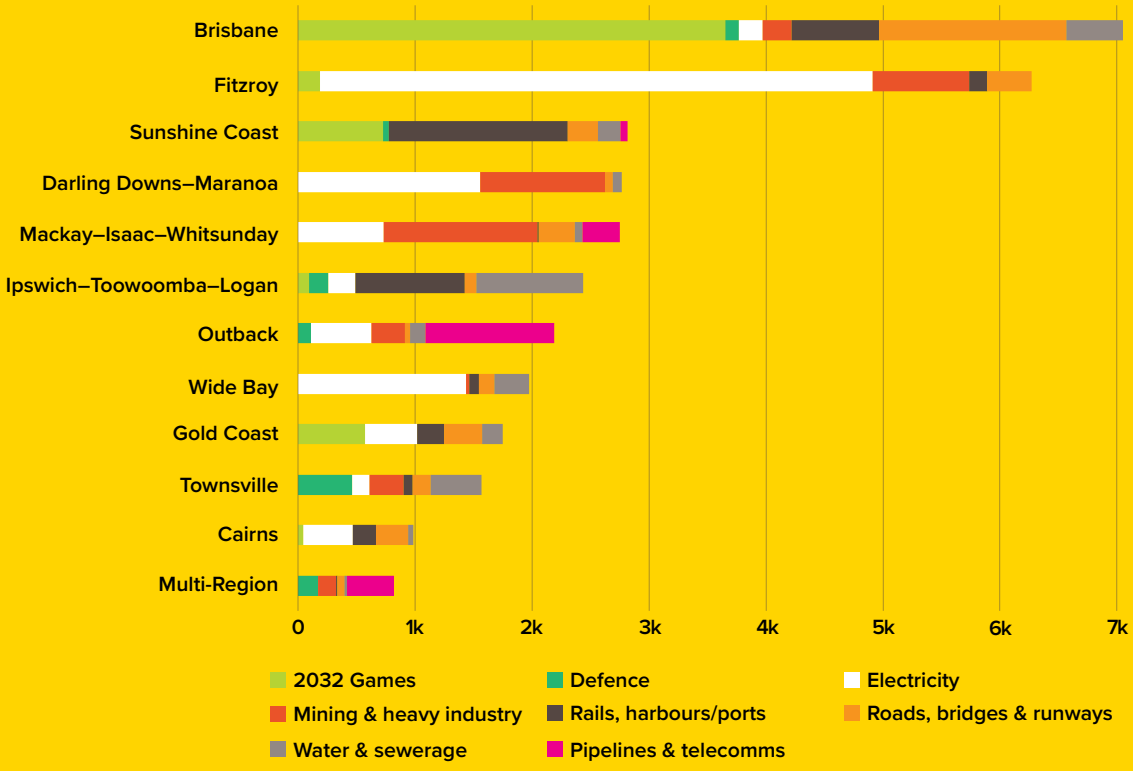
[3]The averages reflect only the project types and delivery years represented within 2026/27 – 2030/31 in each region's pipeline. Shorter projects contribute only for their scheduled delivery years, and project types with no projects in a region are excluded from the regional average.

Labour requirement by region and funding status, average (2026/27 – 2030/31)



Source: CSQ for QMCA

Labour requirement by region and sector, average (2026/27 – 2030/31)



Source: CSQ for QMCA

Construction workforce estimates for the 2032 Games pipeline

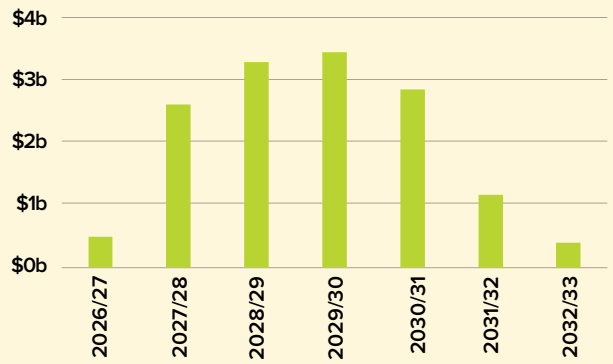
In the lead-up to the Brisbane 2032 Olympic and Paralympic Games, a significant pipeline of infrastructure and venues projects is moving towards delivery across Queensland. Projects are currently at various stages, including site investigations, early works, procurement and construction. As more Games projects transition into full-scale construction, the demand for construction workers is expected to increase rapidly.

Based on the 2032 Games pipeline included in this Report, Queensland has approximately $14.1b of construction work scheduled for delivery through to 2032/33. This includes a mix of competition venues, athlete villages and temporary infrastructure, with most activity scheduled to occur between 2027/28 and 2030/31.

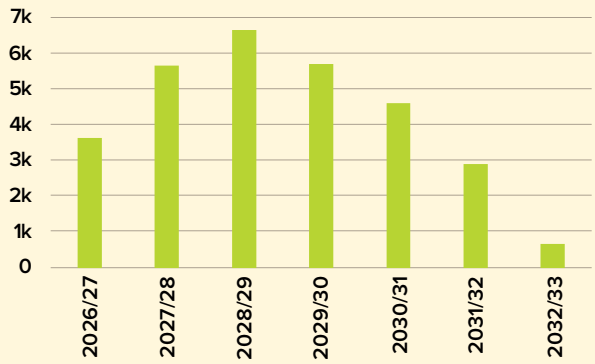
Average labour demand for the Games pipeline is estimated to rise from around 3,600 construction workers in 2026/27 to a peak of approximately 6,600 in 2028/29. Demand is expected to remain elevated at around 5,600 workers in 2029/30 and approximately 4,500 in 2030/31, before easing to approximately 2,900 in 2031/32 and around 700 in 2032/33 as the program nears completion.

The engineering value of the 2032 Games pipeline by financial year is provided to CSQ by QMCA. The average construction labour required to deliver the work scheduled is estimated for each corresponding year. Unlike the labour estimates in other sections, the 2032 Games analysis extends to 2032/33 to capture the full project horizon.

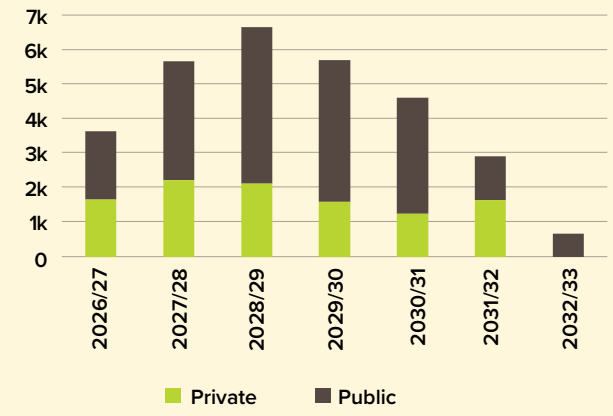
The 2032 Games pipeline



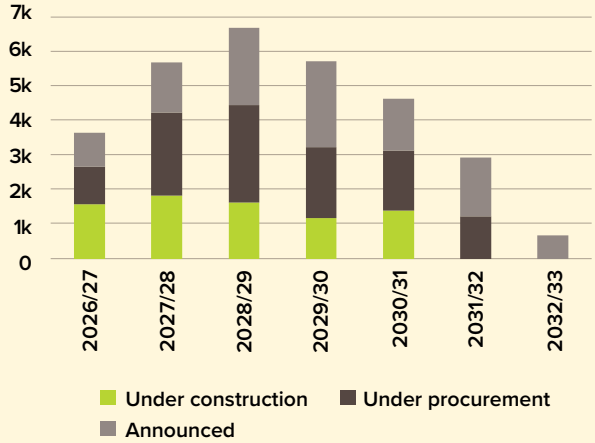
Average labour demand for the 2032 Games pipeline



Average labour demand for the 2032 Games pipeline by funding source



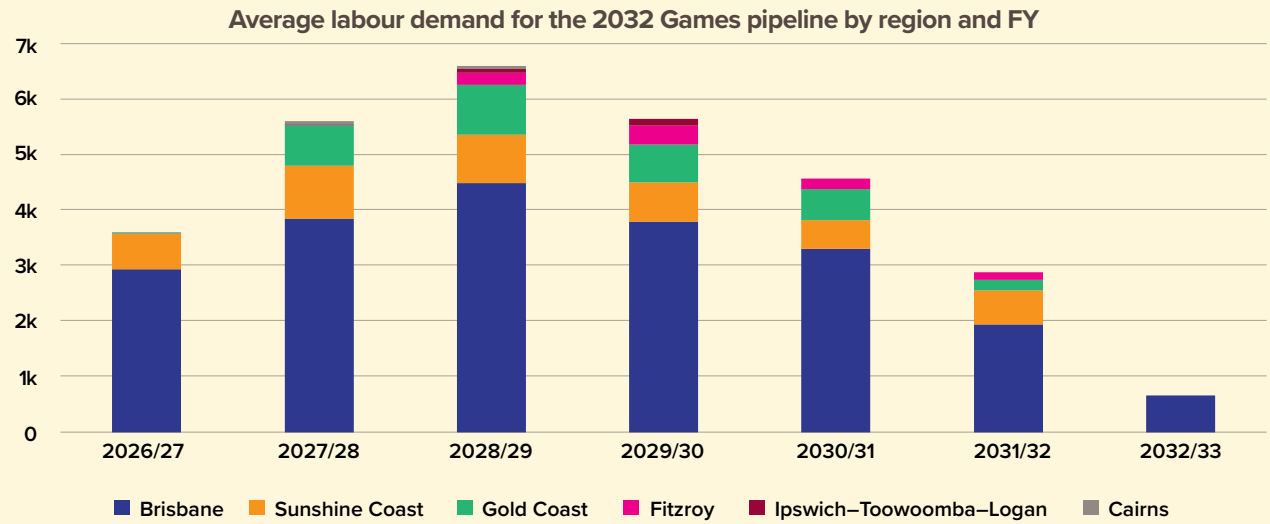
Average labour demand for the 2032 Games pipeline by project status



Source: CSQ for QMCA

Publicly funded projects account for most estimated average labour demand in every year except 2031/32. From 2026/27 to 2030/31, they represent between 54% and 73% of demand. In 2031/32, privately financed projects account for 57% of demand. This reflects accelerating work on the privately funded Brisbane Athletes' Village, Brisbane Arena, Sunshine Coast Arena and Sunshine Coast Athletes' Village.

Most labour demand is underpinned by projects already in construction or procurement, providing greater certainty about near-term workforce requirements. In 2026/27, these advanced-stage projects are estimated to require an average of approximately 2,600 workers, accounting for 73% of demand in that year. This is estimated to rise to around 4,200, equivalent to 75% of average demand in 2027/28. At the 2028/29 peak, these projects are estimated to require approximately 4,400 workers, accounting for 66% of demand.



Source: CSQ for QMCA

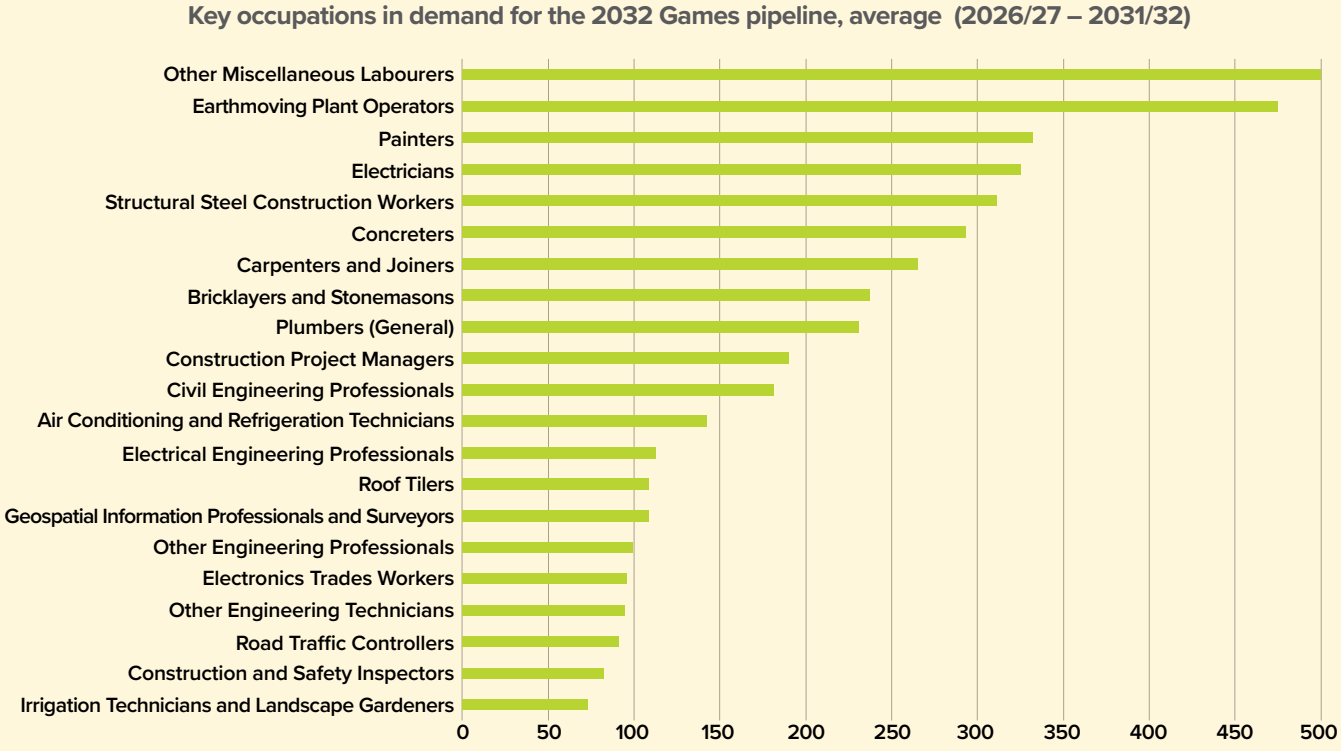
Delivery of the Games pipeline is expected to generate significant, concentrated workforce demand across South East Queensland.

Brisbane accounts for the largest share of labour demand throughout the delivery period, reflecting the scale and concentration of projects planned across the metropolitan area. Average labour demand is estimated to rise from approximately 2,900 workers in 2026/27 to a peak of around 4,500 in 2028/29. It is then expected to ease to around 1,900 workers in 2031/32 and approximately 700 in 2032/33 as the program approaches completion.

On the Sunshine Coast, average labour demand is estimated to increase from approximately 600 workers in 2026/27 to a peak of around 900 workers in 2027/28. Demand is expected to remain above 500 workers annually through to 2031/32, indicating a sustained workforce requirement across the delivery period.

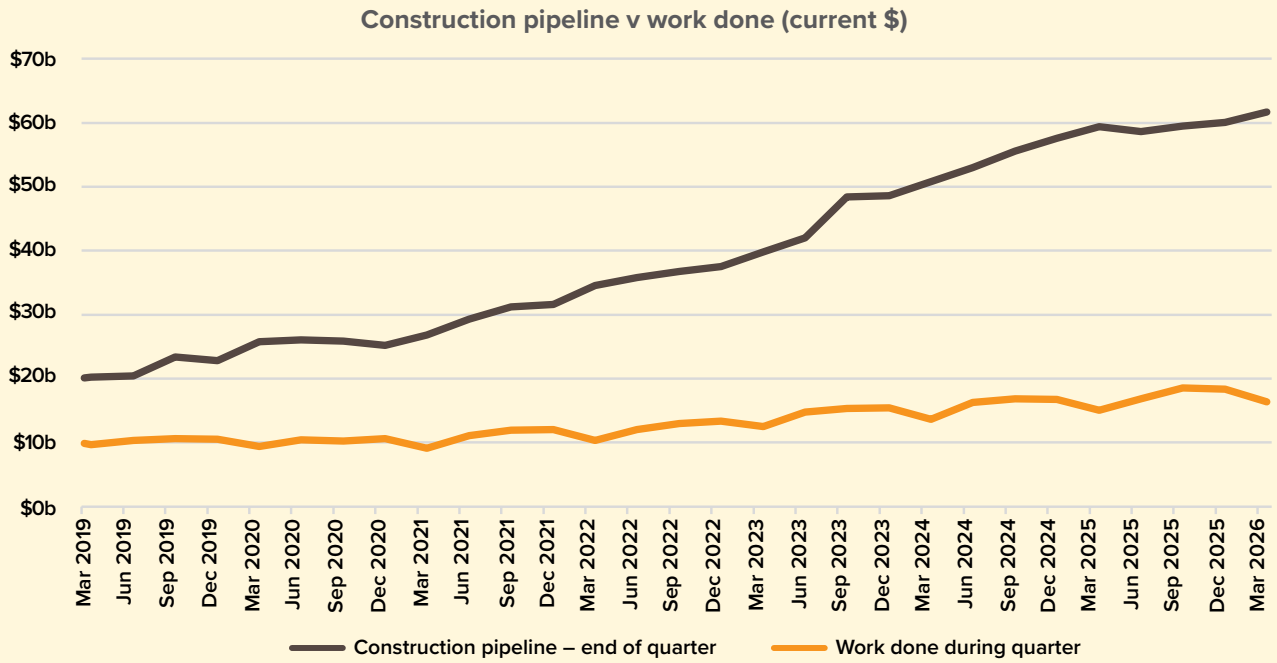
On the Gold Coast, average labour demand is expected to rise sharply from approximately 20 in 2026/27 to around 700 in 2027/28. Demand is projected to peak at approximately 900 workers in 2028/29, coinciding with Brisbane's peak labour requirement.

Delivering the Games pipeline is estimated to increase demand for a broad range of construction occupations. Demand is expected to be particularly strong for core trades and site-based roles, including labourers, earthmoving plant operators, painters, electricians, structural steel construction workers, concreters, carpenters and joiners, bricklayers and stonemasons, and plumbers. As multiple projects progress concurrently across the host regions, demand for these occupations is expected to remain elevated throughout the delivery period.



Source: CSQ for QMCA

Current trends in Queensland's construction activity



Source: Australian Bureau of Statistics

Queensland is experiencing one of Australia's most significant construction cycles. The value of its construction pipeline has more than doubled from approximately $25.7b in March 2020 to $61.8b in March 2026.

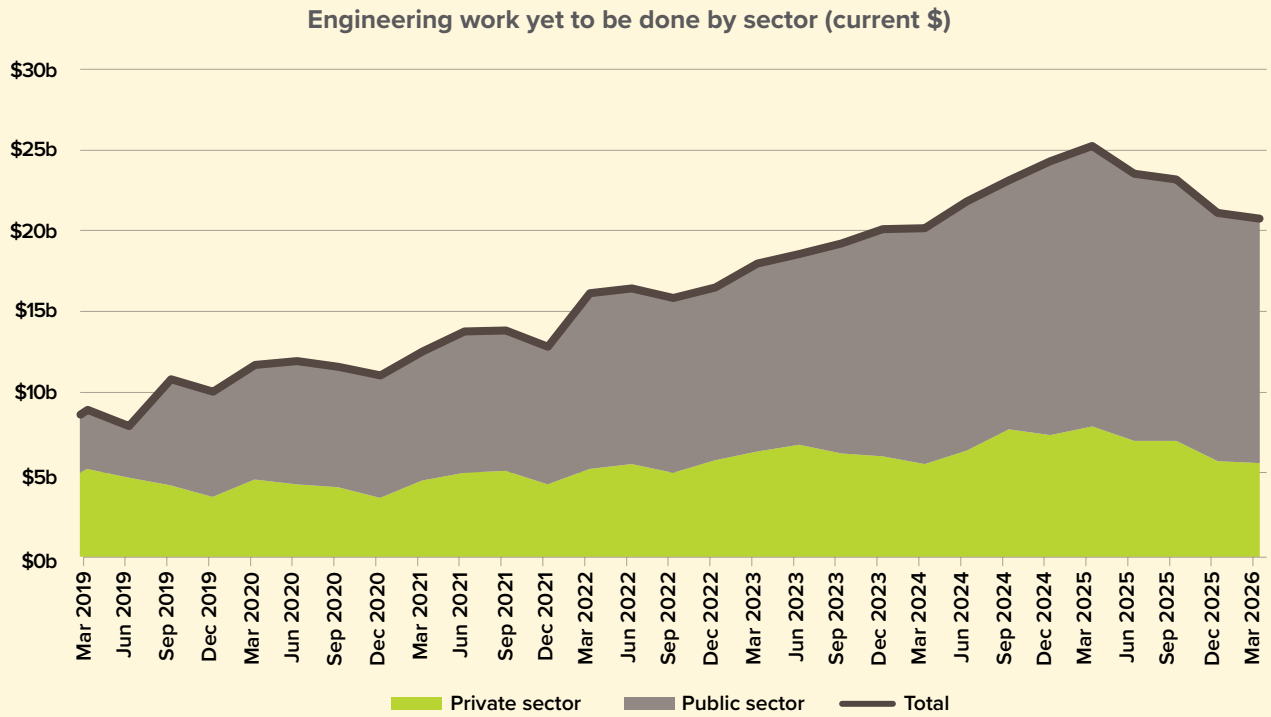
With new projects continuing to enter the pipeline, the gap between the value of work in the pipeline and work done has now widened to $45.3b, up from $16.4b in March 2020.

Building work accounts for most of the pipeline at $41.1b, or 66%, comprising $24.5b in residential and $16.6b in non-residential construction.

Engineering accounts for the remaining $20.7b, or 34% of the pipeline. Public-sector infrastructure investment underpins most of the engineering work, while private-sector projects – particularly in heavy industry – provide further momentum.

Of the engineering work yet to be done as of March 2026, 72% ($15b) was public-sector work. Bridges, railways and harbours accounted for the largest share at 39% ($5.9b), followed by water, sewerage and drainage at 27% ($4.1b), and roads, highways and subdivisions at 23% ($3.5b). The private sector accounted for the remaining 28% ($5.8b), led by heavy industry at 47% ($2.7b), followed by roads, highways and subdivisions at 24% ($1.4b).





Source: Australian Bureau of Statistics

The growing public-sector share reflects Queensland's sustained investment in infrastructure to support its long-term development. The 2026/27 Queensland Budget provides a historic $119.2b for social and economic infrastructure over four years, including $29.6b in 2026/27 alone.

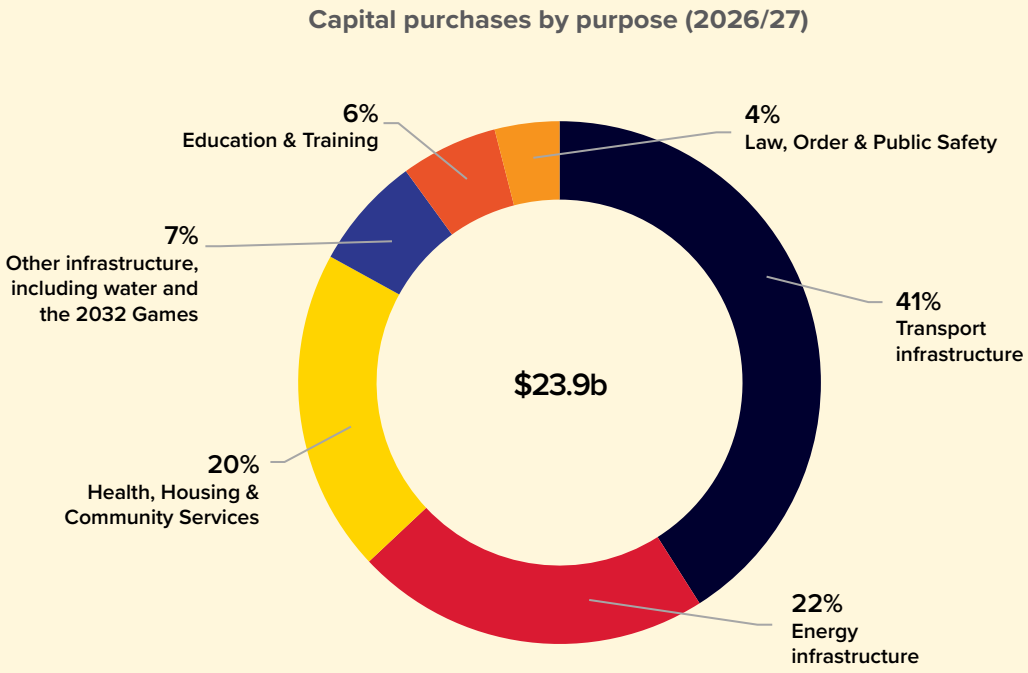
The 2026/27 capital program comprises $23.9b in capital purchases and $5.7b in capital grants. Around 69.3% is allocated outside Greater Brisbane, highlighting the scale of investment across regional Queensland. Funding spans transport, energy, health, housing, education and other essential infrastructure.

Transport and energy together account for around 63% of the $23.9b capital purchases program. Transport represents the largest share at 41%, reflecting continued investment in road, rail and public transport infrastructure to improve connectivity, support population growth and deliver infrastructure associated with the 2032 Games.

Energy accounts for a further 22% of capital purchases, supporting delivery of the Queensland Government's Energy Roadmap and its objective of a reliable, affordable and sustainable energy system.

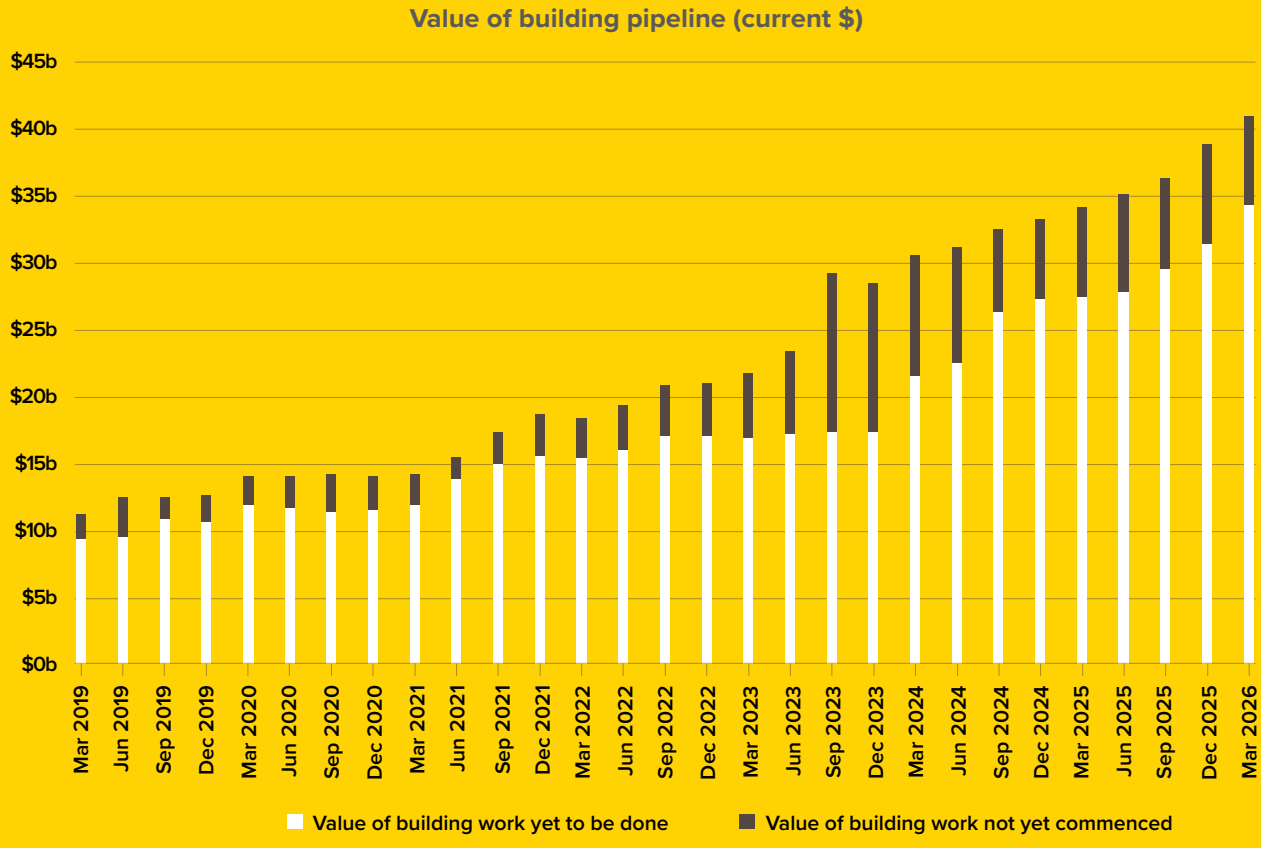
Health, housing and community services account for another 20%, reflecting substantial investment in health facilities, housing and community infrastructure.





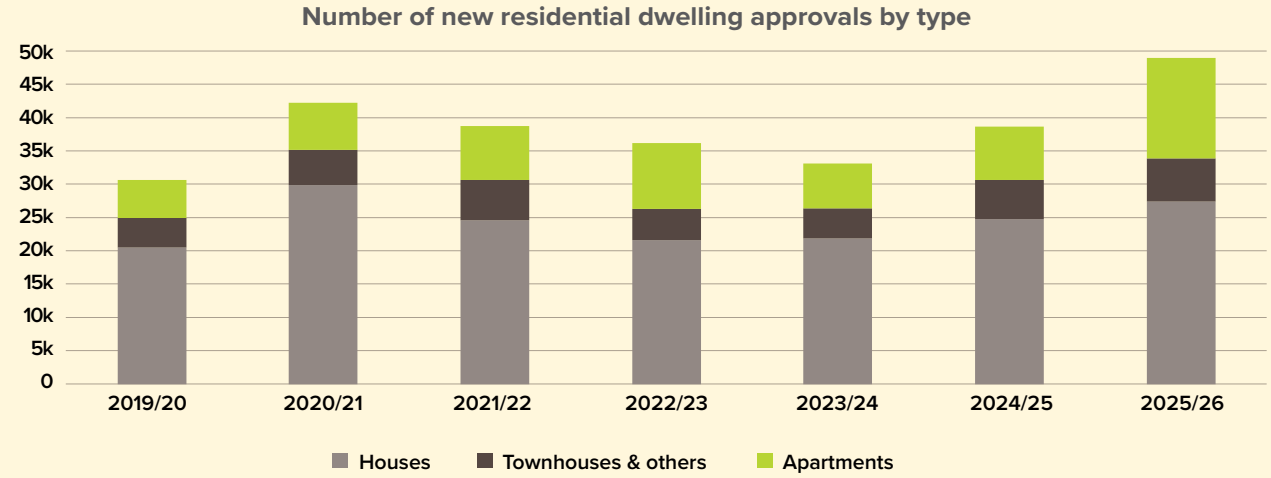
Source: Queensland Budget 2026/27

In addition to a growing engineering workload, Queensland's building pipeline has also increased significantly over the years. As of March 2026, the total value of the building pipeline reached $41.1b, comprising $24.5b in residential and $16.6b in non-residential construction. Around 83.8% ($34.4b) represented work yet to be done, comprising projects that had commenced but were not yet finished, while the remaining 16.2% ($6.6b) represented approved work yet to commence.



Source: Australian Bureau of Statistics

Queensland's residential construction outlook is strengthening as dwelling approvals recover, indicating a renewed flow of housing projects into the pipeline.



Source: Australian Bureau of Statistics

Following three consecutive annual declines, dwelling approvals increased by 17% in 2024/25 and a further 27% in 2025/26. This marked a strong recovery from the annual declines of 8%, 7% and 9% recorded over the preceding three years.

Dwelling approvals reached 48,431 in 2025/26, around 16% above the previous peak of 41,789 recorded in 2020/21. Growth was broad-based across dwelling types, led by an 87% increase in apartment approvals from the previous year, followed by an 11% rise in townhouses and other dwellings and a 10% increase in house approvals.

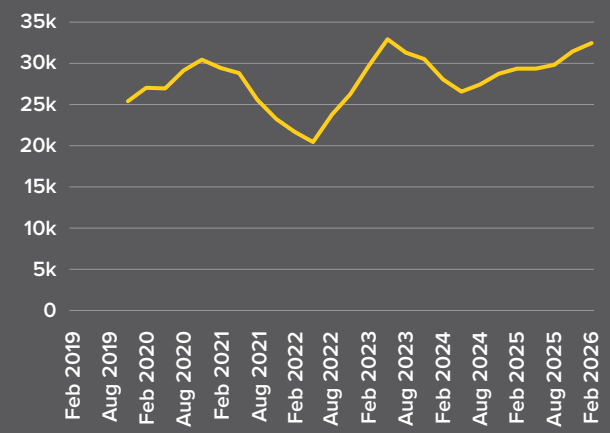
The Queensland Government is supporting housing delivery across the state through various measures that address constraints across the supply chain. These include investment in enabling infrastructure, initiatives to unlock more land, first home buyer assistance, and funding for social and affordable housing.

Unlocking workforce opportunities from the growing construction pipeline

Queensland's expanding construction pipeline is creating significant opportunities to grow the workforce and strengthen industry capability.

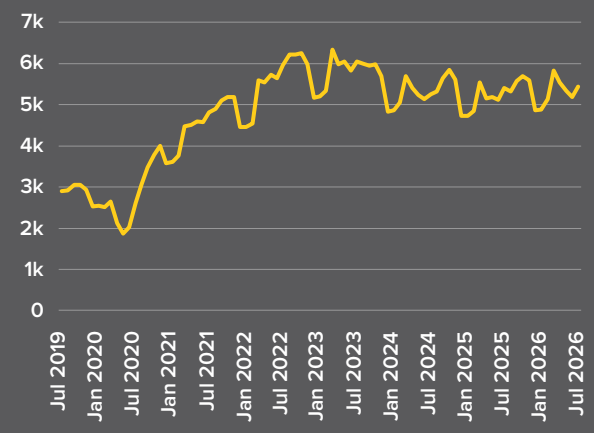
Construction industry employment in Queensland reached approximately 285,785 workers in February 2026[4], 24% higher than the same period in 2021. Heavy and civil engineering construction employed around 32,400 workers, representing growth of 10% from the same period in 2021.

Heavy and civil sub-industry employment



Source: Australian Bureau of Statistics

Internet vacancies for construction trades jobs

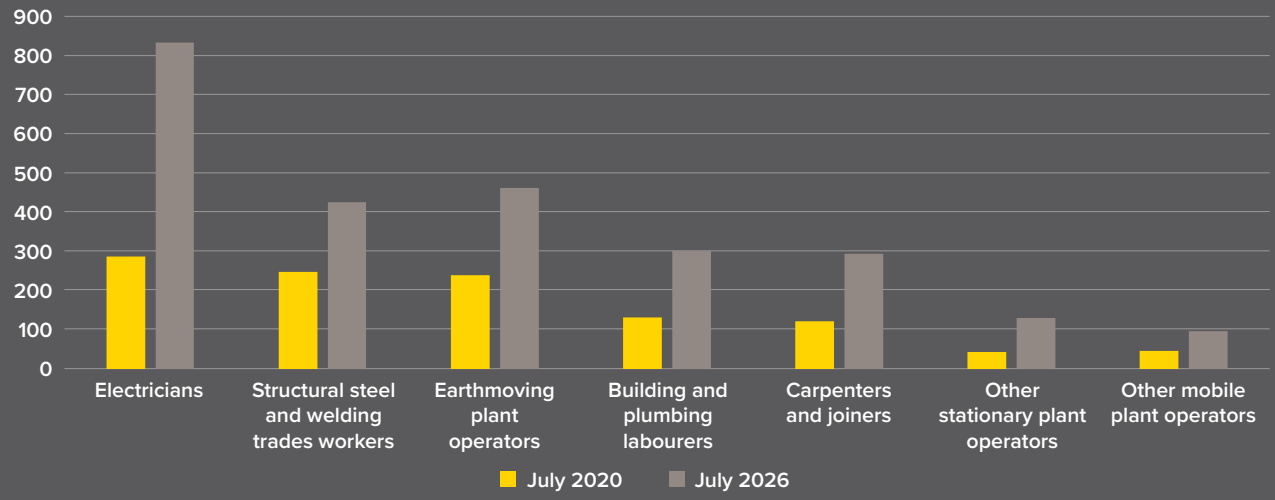


Source: Jobs and Skills, Australia

[4]Preceding 4 quarter average.

Demand remains high across several occupations essential to delivering engineering projects. Online vacancies for selected construction trades and plant operator roles have rebounded strongly from pandemic lows. Around 5,400 vacancies were advertised online in July 2026, 108% more than in July 2020.

Number of internet vacancies for selected construction roles



Source: Jobs and Skills, Australia

Selected occupations with consistently high vacancy levels include electricians, structural steel and welding trades workers, plant operators, building and plumbing labourers, and carpenters and joiners.

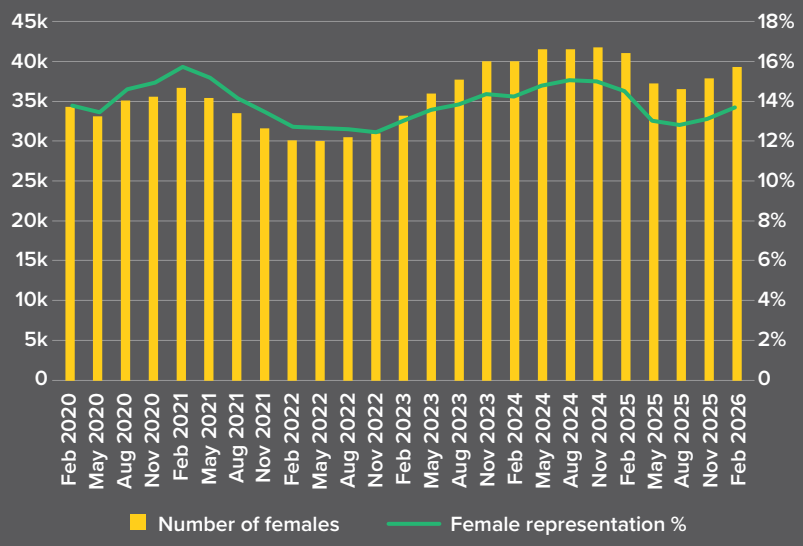
Developing a sustainable construction workforce requires local skills initiatives that attract new entrants, support career advancement and expand participation. As construction activity grows across Queensland, increasing the involvement of women and other underrepresented groups will be vital to building a stronger, more diverse workforce.

In February 2026, Queensland's construction industry employed around 38,900 women, 15% more than in February 2020, equating to 14% of total industry employment.

More women are also entering trade roles. Around 8,800 women were employed in these roles in February 2026, nearly double the number in February 2020, lifting their representation from 3% to 5%.

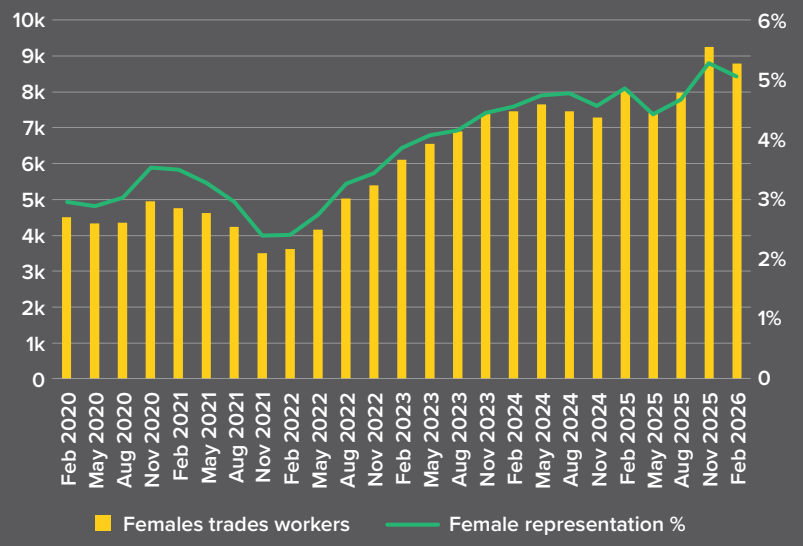
This upward trend provides a strong foundation for expanding the workforce to meet Queensland's future construction needs.

Female employment in construction industry



Source: Australian Bureau of Statistics

Females in construction trades roles



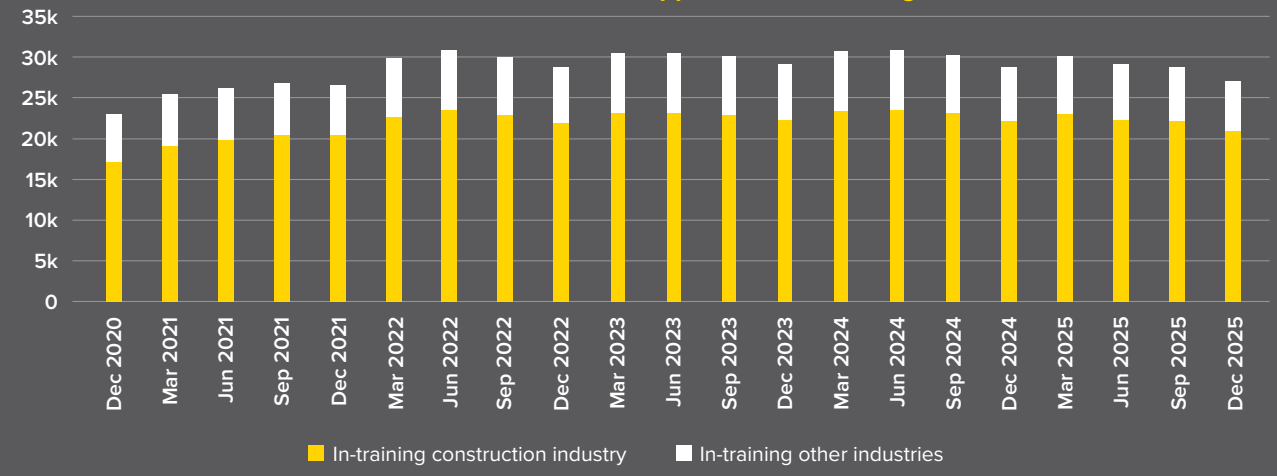
Source: Australian Bureau of Statistics, CSQ

Apprenticeships are a key source of new workers for the construction industry.

As of December 2025, around 27,000 construction apprentices were in training across Queensland, 18% more than in December 2020. Most were employed within the construction industry—77%, or approximately 20,900—while the remaining 23%, or 6,080, worked in other industries.

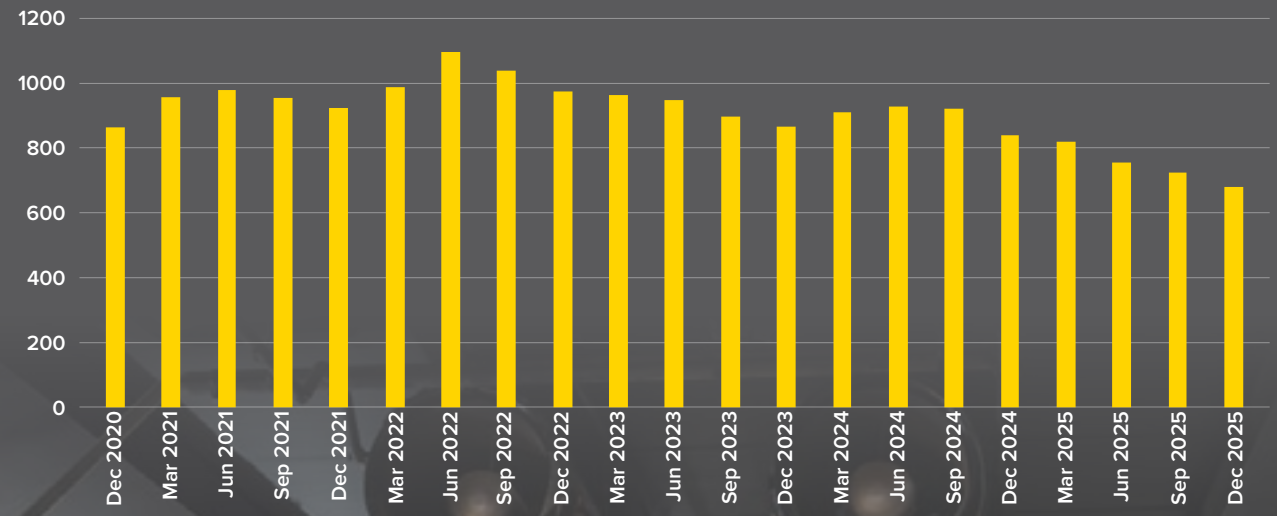
Of the 20,900 apprentices employed in construction, around 680 were in heavy and civil engineering construction.

Number of construction apprentices in-training



Source: National Centre for Vocational Education Research

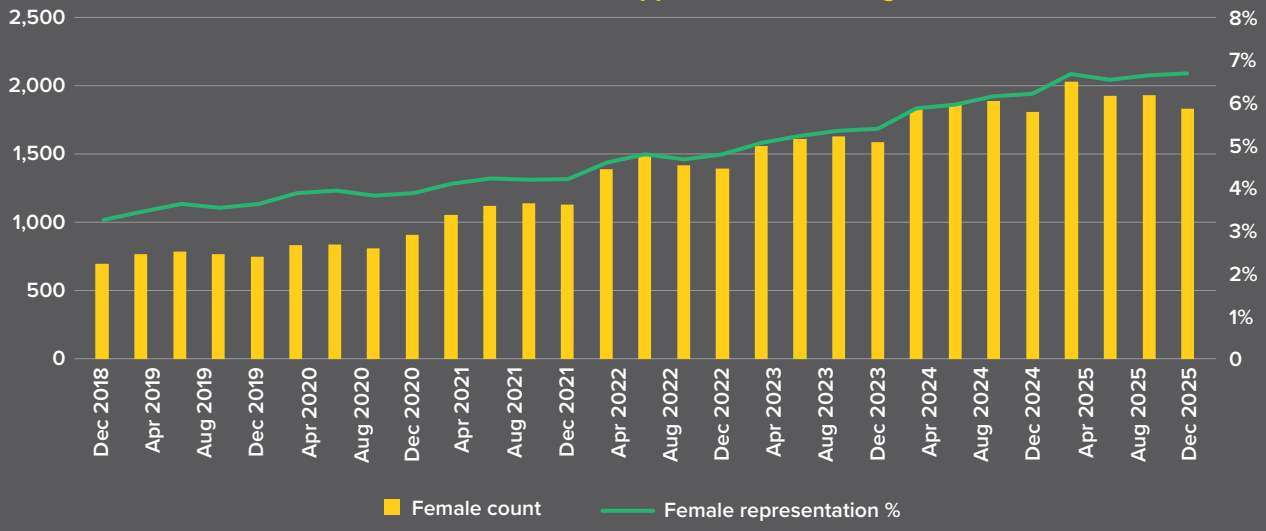
Number of construction apprentices in-training, heavy and civil engineering



Source: National Centre for Vocational Education Research

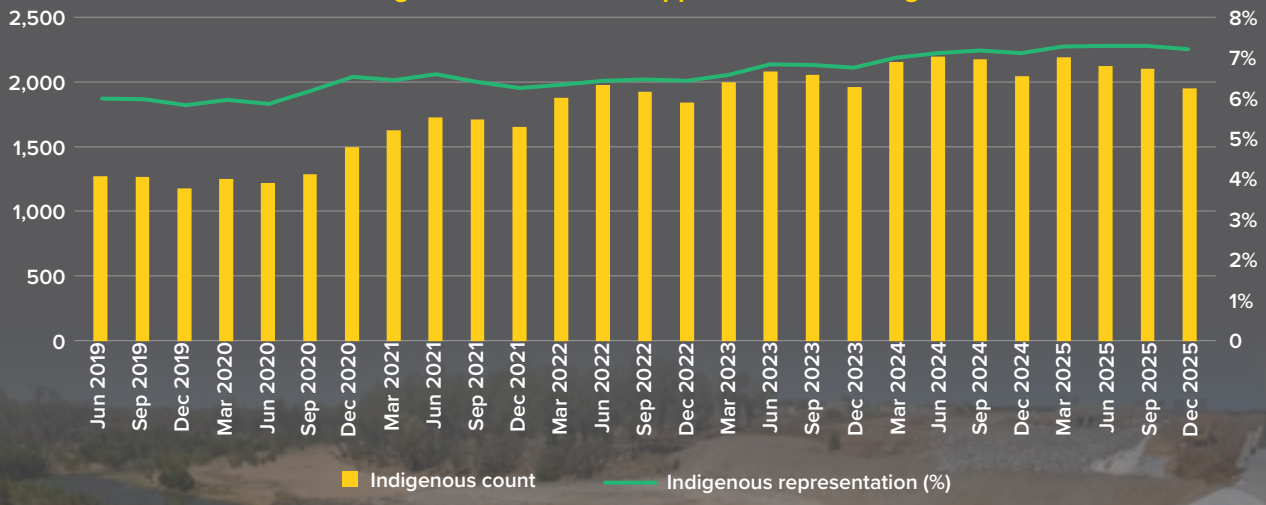
Queensland's strong construction pipeline presents a significant opportunity to expand the apprentice workforce and attract people from more diverse backgrounds. Of the 27,000 construction apprentices in training at the end of 2025, approximately 1,800, or 6.7%, were women, while around 1,950, or 7.2%, identified as Aboriginal and/or Torres Strait Islander peoples.

Female construction apprentices in-training



Source: National Centre for Vocational Education Research

Indigenous construction apprentices in-training



Source: National Centre for Vocational Education Research



Sector Outlook





Roads and Bridges

Road and bridges represent the largest sector in this Report, with a funded project pipeline across the period to 2030/31 valued at $22b. This represents 26.6% of all funded projects.

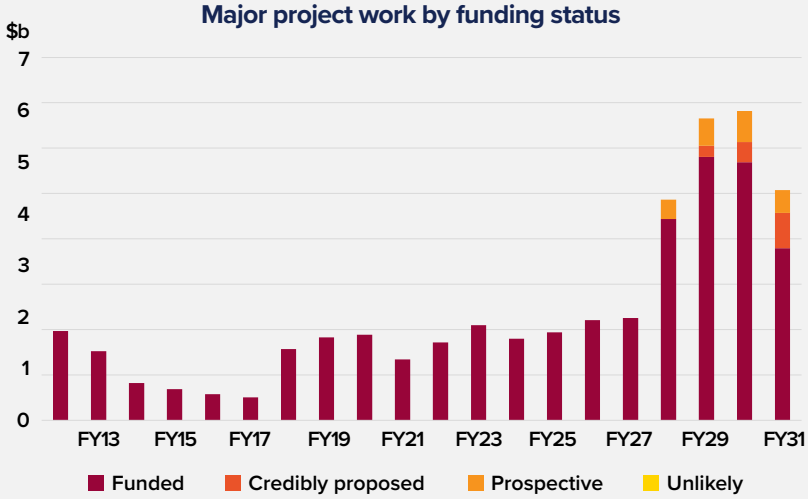
This is $3b up on the 2025 Report and comes as a result of a number of new projects commencing or being announced, including:

- Coomera Connector – Stage 2, $2,035m, 2028/29 to 2032/33
- Logan Motorway – Western Upgrade, $700m, 2027/28 to 2030/31
- Bruce Highway – Anzac Avenue to Uhlmann Road, $623m, 2027/28 to 2029/30
- Sunshine Motorway – Mooloolah River Interchange Stage 2, $595m, 2027/28 to 2031/32
- Brisbane Airport Upgrade (Parking and Access Upgrades), $578m, 2027/28 to 2031/32
- Bruce Highway – Gorganga Plains Upgrade, $475m, 2027/28 to 2029/30
- Bruce Highway – Gateway Mwy - Dohles Rocks Rd- Stage 2, $413m, 2028/29 to 2031/32
- Bruce Highway – Tiaro Flood Immunity Upgrade, $400m, 2027/28 to 2030/31
- Ipswich Motorway; Rocklea to Darra Stage 2 – Oxley to Darra, $390m, 2028/29 to 2030/31
- Barron River Gorge Bridge Replacement, $339m, 2027/28 to 2028/29
- Level Crossing Removal – Boundary Road, $279m, 2027/28 to 2029/30
- Brisbane Airport Upgrade (Roads & Transport), $255m, 2027/28 to 2030/31

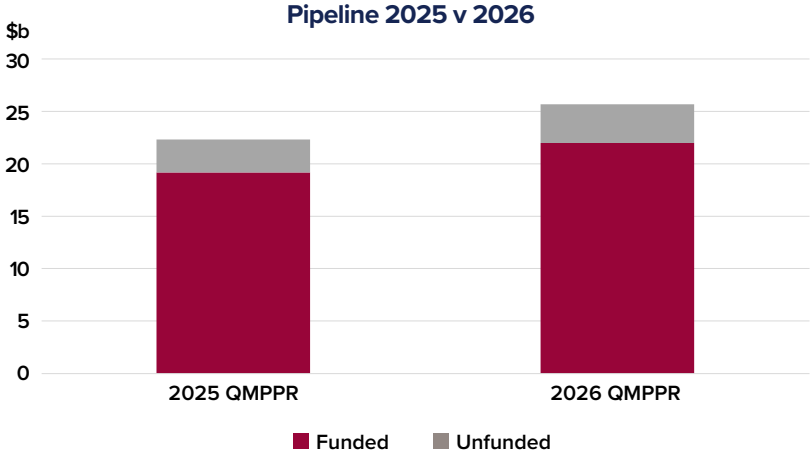
Funded roads and bridges major project activity will range from $2.3b in 2026/27 to $3.8b in 2030/31 and will peak at $5.8b in 2028/29. Across the pipeline period, funded roads and bridges major project activity will average $4.4b each year.

However, the percentage of the total pipeline that is unfunded is also rising, from 14.1% in the 2025 Report to 14.4% in the 2026 Report. Publicly funded roads and bridges projects continue to dominate the pipeline.

Major project work by funding status



Pipeline 2025 v 2026



Source: QEAS, QMCA analysis

Key material requirements per year:

Material	Max annual demand	Average annual demand
Concrete	215,000m^3	162,500m^3
Precast concrete	215,900m^2	162,500m^2
Structural steel	680t	515t
Reinforcing steel	11,300t	8,500t
Aggregate	21.8Mt	16.4Mt



Railways and Harbours

Railways and harbours has a funded project pipeline across the period to 2030/31 valued at $11.4b and represents 13.8% of all funded projects.

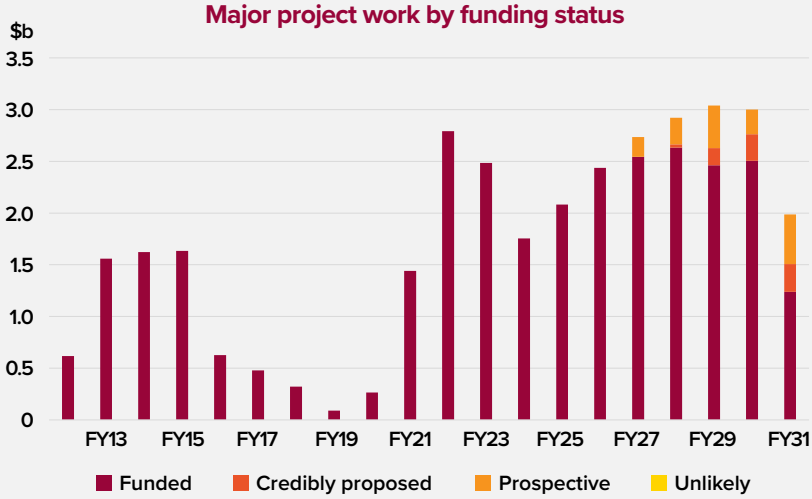
This is a $2.9b increase on the 2025 Report and represents major projects predominantly across South East Queensland (SEQ). New major funded projects that support construction activity in the pipeline period include:

- The Wave – Stage 1a Direct Sunshine Coast Line (Beerwah to Caloundra), $850m, 2026/27 to 2030/31
- The Wave – Stage 1b Direct Sunshine Coast Line (Beerwah to Caloundra), $2,500m, 2026/27 to 2031/32
- The Wave – Stage 2 Direct Sunshine Coast Line (Caloundra to Birtinya), $1,380m, 2027/28 to 2031/32
- Gold Coast Light Rail Stage 2b (Parklands – Harbour Town), $600m, 2027/28 to 2030/31
- New Generation Rollingstock, Automatic Train Operation & Platform Screen Doors fitment, $202m, 2026/27 to 2029/30
- Cairns Port Ship Lift & Marine Precinct, $500m, 2026/27 to 2028/29
- Port of Townsville Channel Capacity Expansion (Stage 2), $127m, 2027/28 to 2031/32
- Port of Brisbane Fuel Security Precinct, $100m, 2027/28 to 2029/30

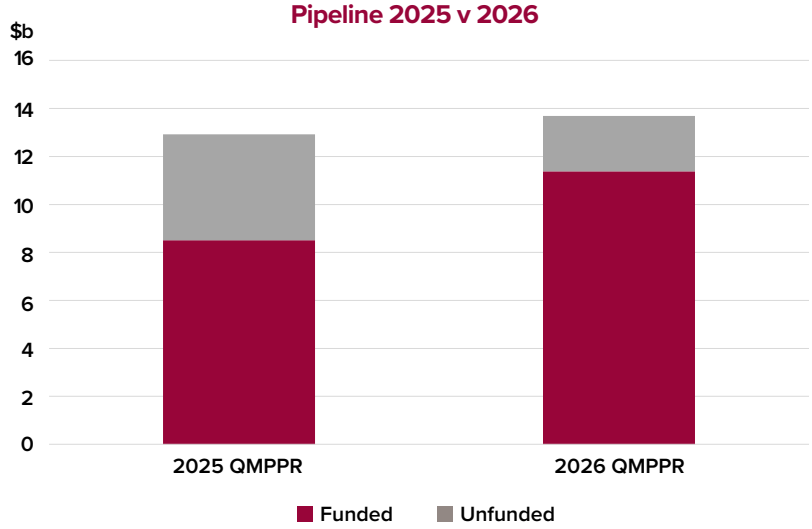
Funded railways and harbours major project activity will range from $2.5b in 2026/27 to $1.2b in 2030/31 and will peak at $2.6b in 2027/28. Across the pipeline period, funded railways and harbours major project activity will average $2.3b each year.

The percentage of the total pipeline that is unfunded will fall from 34.1% in the 2025 Report to only 16.8% in the 2026 Report.

Major project work by funding status



Pipeline 2025 v 2026



Source: QEAS, QMCA analysis

Key material requirements per year:

Material	Max annual demand	Average annual demand
Concrete	88,200m^3	73,000m^3
Precast concrete	88,200m^2	71,300m^2
Structural steel	86,100t	71,300t
Reinforcing steel	17,300t	14,400t
Aggregate	8.9Mt	7.4Mt



Water and Sewerage

Water and sewerage represents 7.4% of all funded projects and has a funded project pipeline across the period to 2030/31 valued at $6.1b and is down $392m or 6% on the 2025 Report. Publicly funded water and sewerage projects comprise the entire pipeline.

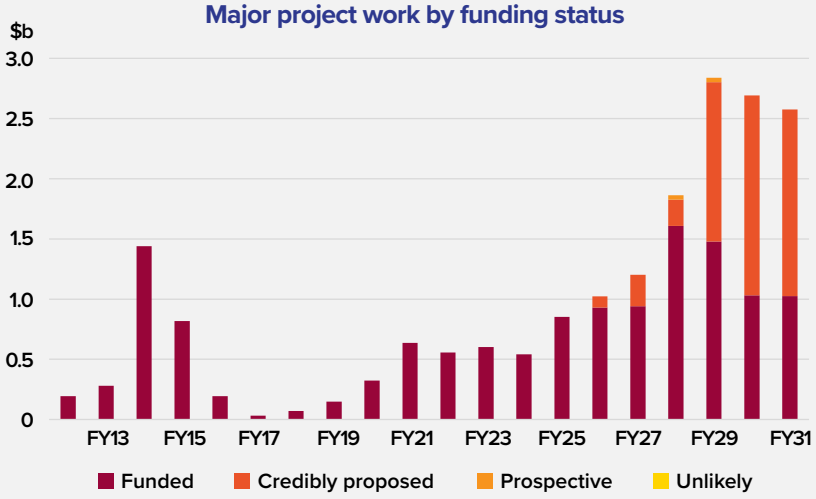
New major funded projects to the pipeline that support construction activity across the period include:

- Toowoomba to Warwick Pipeline, $222m 2026/27 to 2028/29
- Indigenous Communities Water Security Program, $141m 2026/27 to 2033/34
- Cooranga Weir, $105m 2027/28 to 2029/30
- Kawana STP Upgrade, $173m 2026/27 to 2029/30
- Somerset Dam Upgrade, $850m 2028/29 to 2032/33
- North Pine Dam, $756m 2027/28 to 2030/31
- Somerset Dam – Early Works, $355m 2027/28 to 2029/30
- Westbrook Water Treatment Plant, $140.1m 2027/28 to 2028/29
- Gold Coast Council Long Term Recycled Water Release Stage 2, $188m 2026/27 to 2027/28
- Eagle Farm Rising Main Upgrade, $124m 2026/27 to 2033/34

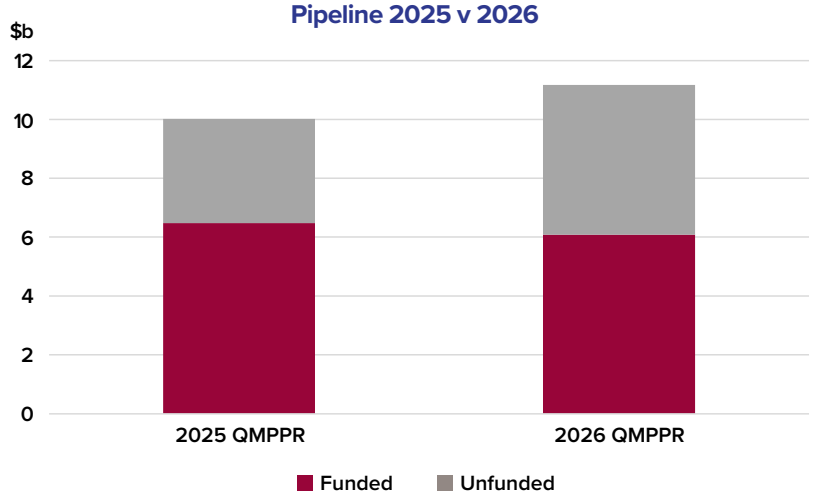
Funded water and sewerage major project activity will range from $941m in 2026/27 to $1b in 2030/31 and will peak at $1.6b in 2027/28. Across the pipeline period, funded water and sewerage major project activity will average $1.2b each year.

The percentage of the total pipeline that is unfunded has increased from 35.3% in the 2025 Report to 45.5% in the 2026 Report with the Burdekin Fall Dam – Raising, Wivenhoe Dam Safety Upgrade and Northern Pipeline Interconnector all unfunded at present.

Major project work by funding status



Pipeline 2025 v 2026



Source: QEAS, QMCA analysis

Key material requirements per year:

Material	Max annual demand	Average annual demand
Concrete	145,800m^3	123,700m^3
Precast concrete	99,000m^2	84,000m^2
Structural steel	265t	225t
Reinforcing steel	7,600t	6,500t
Aggregate	175,000t	150,000t



Electricity, pipelines and telecomms

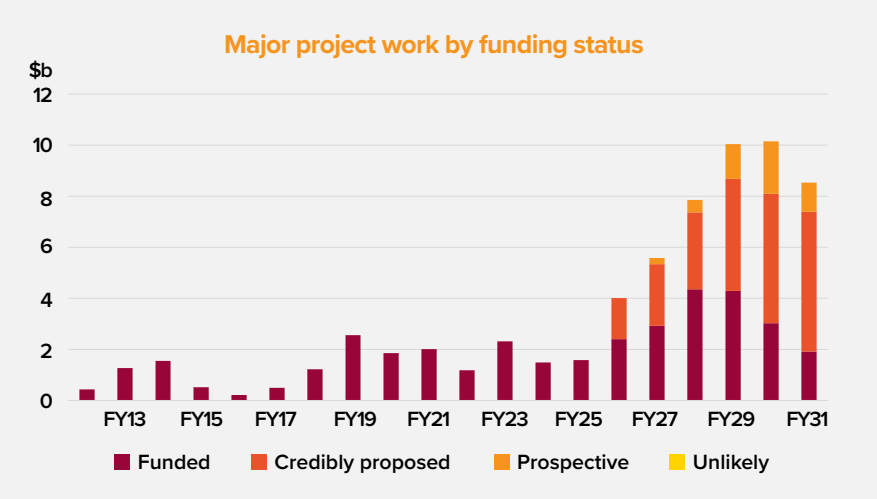
Electricity, pipelines and telecommunications is the second largest project pipeline representing 20% of all funded projects. This sector has a funded project pipeline across the period to 2030/31 valued at $16.5b and despite its size, the five-year pipeline is down $6.3b on the 2025 Report or 27.4%.

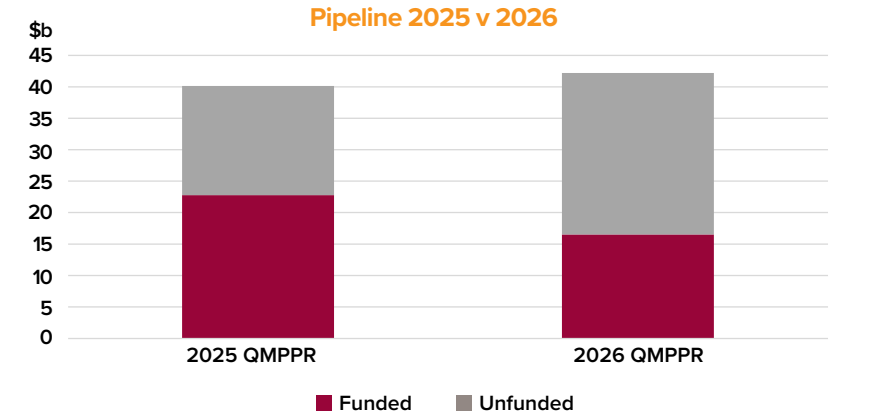
Electricity, pipelines and telecommunications major project activity will range from $2.9b in 2026/27 to $1.9b in 2030/31 and will peak at $4.4b in 2027/28. Across the pipeline period, funded major project activity in this sector will average $3.3b each year.

New major funded projects that support construction activity in the pipeline period include:

- Bulli Creek Solar Farm, $675m 2027/28 to 2029/30
- Copperstring Transmission Line (Western Link), $3,150m 2030/31 to 2034/35
- Forest Wind, $1,000m 2027/28 to 2029/30
- Theodore Wind Farm Stage 1, $500m 2026/27 to 2029/30
- Capricorn Energy Pumped Hydro, $2,500m 2028/29 to 2031/32
- Renewable Energy Zone Transmission (Far North Queensland), $504m 2027/28 to 2030/31
- Renewable Energy Zone Transmission (Western Downs), $895m 2026/27 to 2030/31
- Gladstone Project Stage 1 (Transmission Line Reinforcement), $280m 2026/27 to 2028/29
- Central Queensland Gas-Fired Generation Power Station, $448m 2027/28 to 2029/30
- Brigalow Gas Peaking Plant, $553m 2027/28 to 2028/29
- Galilee Gas Pipeline, $426m 2027/28 to 2030/31
- Glenaras to Cooladdi pipeline, $1,066m 2027/28 to 2030/31
- NBN Fibre Upgrade Program (Queensland packages), $911m 2026/27 to 2029/30

However, the percentage of the total pipeline that is unfunded will rise from 43% in the 2025 Report to 61% in the 2026 Report and is now valued at over $25.6b. These projects include mega-project opportunities such as Borumba Dam Pumped Hydro and Moah Creek Renewable Energy. There are significant potential opportunities in this sector associated with data centres over the medium to longer term.





Source: QEAS, QMCA analysis

Key material requirements per year:

Material	Max annual demand	Average annual demand
Concrete	1.7Mm^3	1.4Mm^3
Precast concrete	-	-
Structural steel	300,000t	240,000t
Reinforcing steel	105,300t	86,100t
Aggregate	7.1Mt	6Mt



Defence

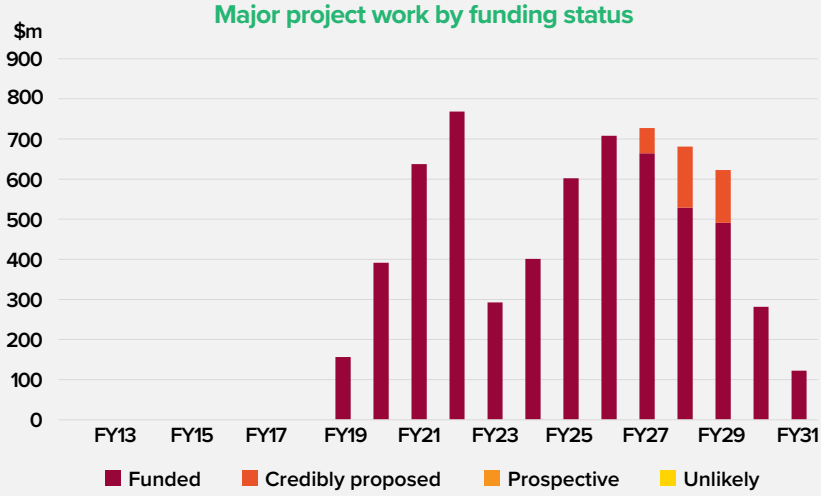
Defence only represents 2.5% of all funded projects and has a project pipeline across the period to 2030/31 valued at $2.1b, and is down $475m on the 2025 Report (18.5%).

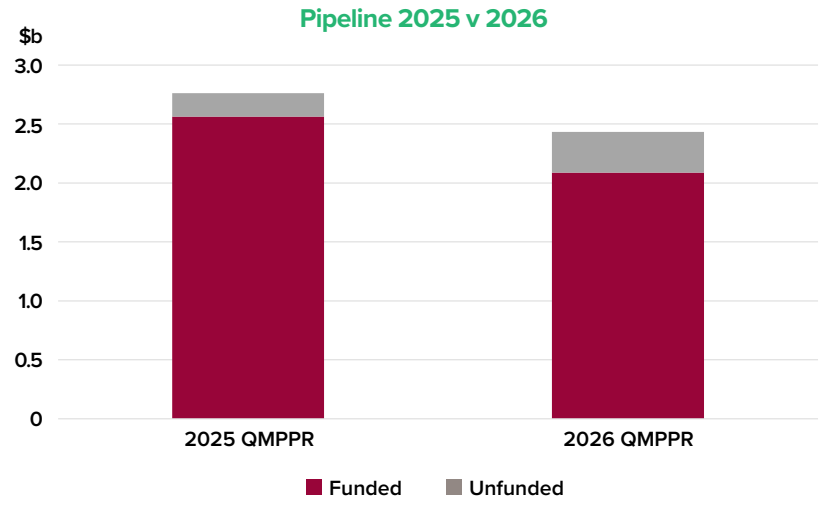
Funded Defence major project activity ranges from $664m in 2024/25 to its peak of $833m in 2026/27 and then falls away to as little as $122m in 2030/31. Across the pipeline period, funded Defence major project activity will average $418m each year.

Major funded projects that support construction activity in the pipeline period include:

- Hervey's Range Facility Upgrade, $800m, 2025/26 to 28/29
- Guided Weapons Explosive Ordnance Storage Project (NSW and Qld), $200m, 2025/26 to 27/28
- Army Aviation of Program of Works – Stage 2 Delivery Phase, $200m, 2024/25 to 26/27
- RAAF Base Amberley (Ongoing Expansion and Capability Projects), $565m, 2024/25 to 29/30
- RAAF Townsville (Garbutt), $538m, 2024/25 to 26/27
- HMAS Cairns (new Arafura-class Offshore Patrol Vessels), $119m, 2023/24 to 25/26
- Greenvale Training Area Upgrade, $610m, 2027/28 to 30/31

Unfunded projects represent 14.2% of asset activity, which is up from the 2025 Report (7.2%). There are longer term proposals for significant investment in bases and training facilities across North Queensland that are yet to be defined and beyond the timeframe of the current pipeline.





Source: QEAS, QMCA analysis

Key material requirements per year:

Material	Max annual demand	Average annual demand
Concrete	52,500m^3	35,200m^3
Precast concrete	5,200m^2	3,500m^2
Structural steel	2,900t	1,950t
Reinforcing steel	4,400t	2,950t
Aggregate	60,000t	40,000t



Resources, energy and heavy industry

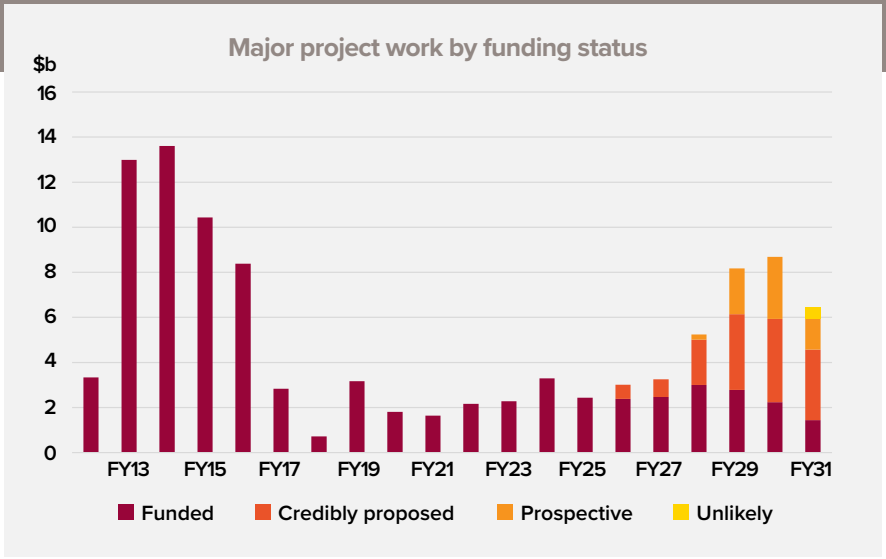
Resources, energy and heavy industry is the fourth largest project pipeline representing 14.5% of all funded projects. The sector's funded project pipeline across the period to 2030/31 is valued at $12b, down $1.8b or 13.3% from the 2025 Report.

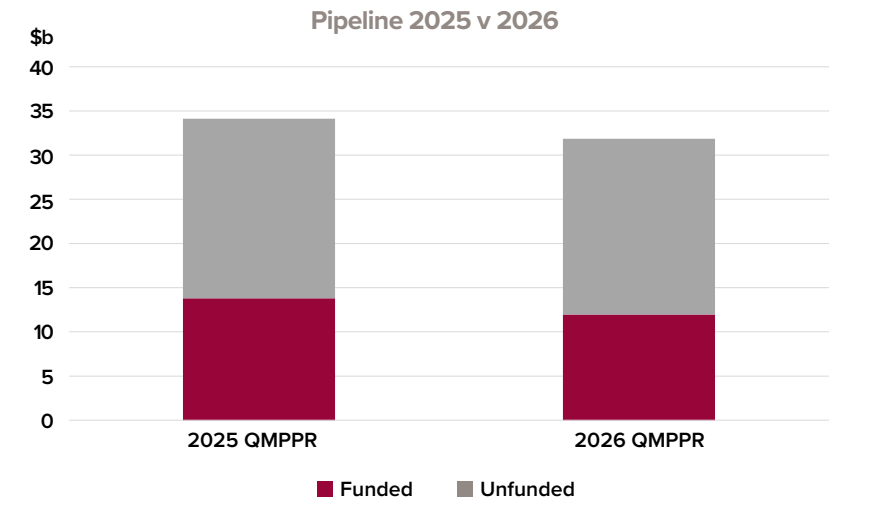
Resources, energy and heavy industry major project activity will range from $2.5b in 2026/27 to $1.4b in 2030/31 and will peak at $3b in 2027/28. Across the pipeline period, funded resources, energy and heavy industry major project activity will average $2.4b each year.

Major and new funded projects that support construction activity in the pipeline period include:

- Cooper–Eromanga Basin gas appraisal programs, $425m, 2026/27 to 2028/29
- Eva Copper Project, $502m, 2026/27 to 2028/29
- Peak Downs Expansion, $345m, 2027/28 to 2029/30
- Lake Vermont (Underground), $300m, 2027/28 to 2029/30
- Saraji East, $1,800m, 2026/27 to 2029/30
- East Olive Downs South Extended/Willunga, $714m, 2027/28 to 2032/33
- Rolleston (Phase 2), $292m, 2028/29 to 2031/32
- Centurion North, $482m, 2027/28 to 2031/32
- Corvus Metallurgical Coal Project, $902m, 2028/29 to 2031/32
- Paradise Phosphate South project, $225m, 2027/28 to 2029/30

The percentage of the total unfunded energy, resources and heavy industry pipeline will rise from 59.6% in the 2025 Report to 62.4% in the 2026 Report and is valued at nearly $20b.





Source: QEAS, QMCA analysis

Key material requirements per year:

Material	Max annual demand	Average annual demand
Concrete	2.1Mm^3	1.6Mm^3
Precast concrete	-	-
Structural Steel	266,500t	197,300t
Reinforcing Steel	110,500t	81,700t
Aggregate	2.5Mt	1.9Mt



The 2032 Games

The 2032 Games projects are now valued at $12.5b across the pipeline period – the third largest sector. While this has increased since the 2025 Report, it now includes the FY31 year and a number of other related projects such as the Gold Coast Arena, Suncorp Stadium upgrade and the temporary infrastructure and overlay. The 2032 Games Program is broken into three components:

- **The permanent venues and facilities:** This is $7.1b jointly funded between the state and federal governments and managed by the Games Independent Infrastructure Coordination Authority (GIICA)
- **The villages and arenas program:** These works are predominantly privately financed and delivered. The state government has committed $3.5b in contribution toward these projects
- **Other works and programs:** These include works on other venues such as Suncorp Stadium, the temporary infrastructure and venue development and overlay, and other ancillary infrastructure.

Engineering spend starts slowly but by 2027/28 is valued at $490m, peaking at $3.4b in 2029/30 and falling to $2.8b in 2030/31. Across the pipeline period, Games major project activity will average $2.5b each year. This category is unique in that it is completely and fully funded.

New and upgraded venues and facilities ($5.7b from 2026/27 to 2030/31):

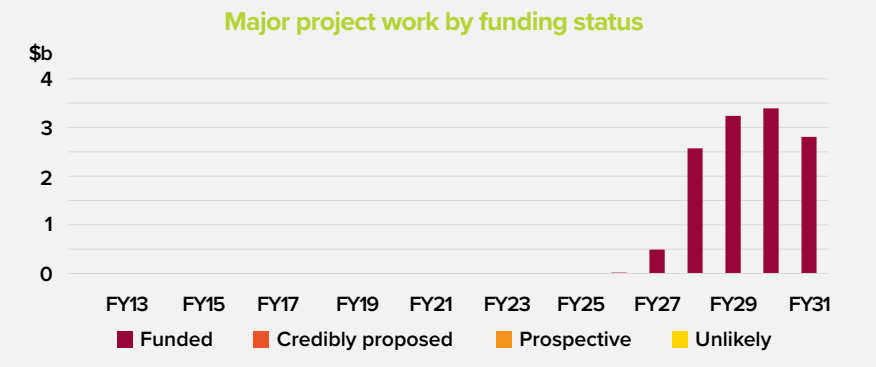
- Brisbane Stadium & Vic Park Development, $2.9b, 2026/27 to 2030/31
- Brisbane Aquatic Centre, $920m, 2026/27 to 2030/31
- Minor Venues Program:
  - Redlands White Water Centre
  - Moreton Bay Indoor Centre
  - Logan Indoor Centre
  - QLD Tennis Centre Upgrade
  - Toowoomba Showgrounds Upgrade
  - Chandler Para Sport Facility Upgrade
  - Sunshine Coast Football Stadium
  - Barlow Park Upgrade
  - Gold Coast Hockey Facility
  - Rockhampton Rowing Facility
  - Sunshine Coast Mountain Bike Facility

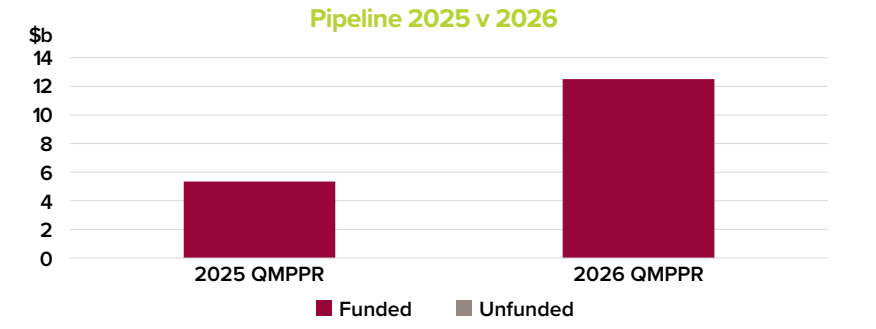
Villages and Arenas Program ($5.8b from 2026/27 to 2030/31):

- Brisbane Athletes Village
- Gold Coast Athletes Village
- Gold Coast Arena
- Brisbane Arena
- Sunshine Coast Arena & Athlete Village
- Rockhampton Athlete Village

Other works and programs (~$1b from 2026/27 to 2030/31):

- Suncorp Stadium Upgrade
- Games Temporary Infrastructure Overlay





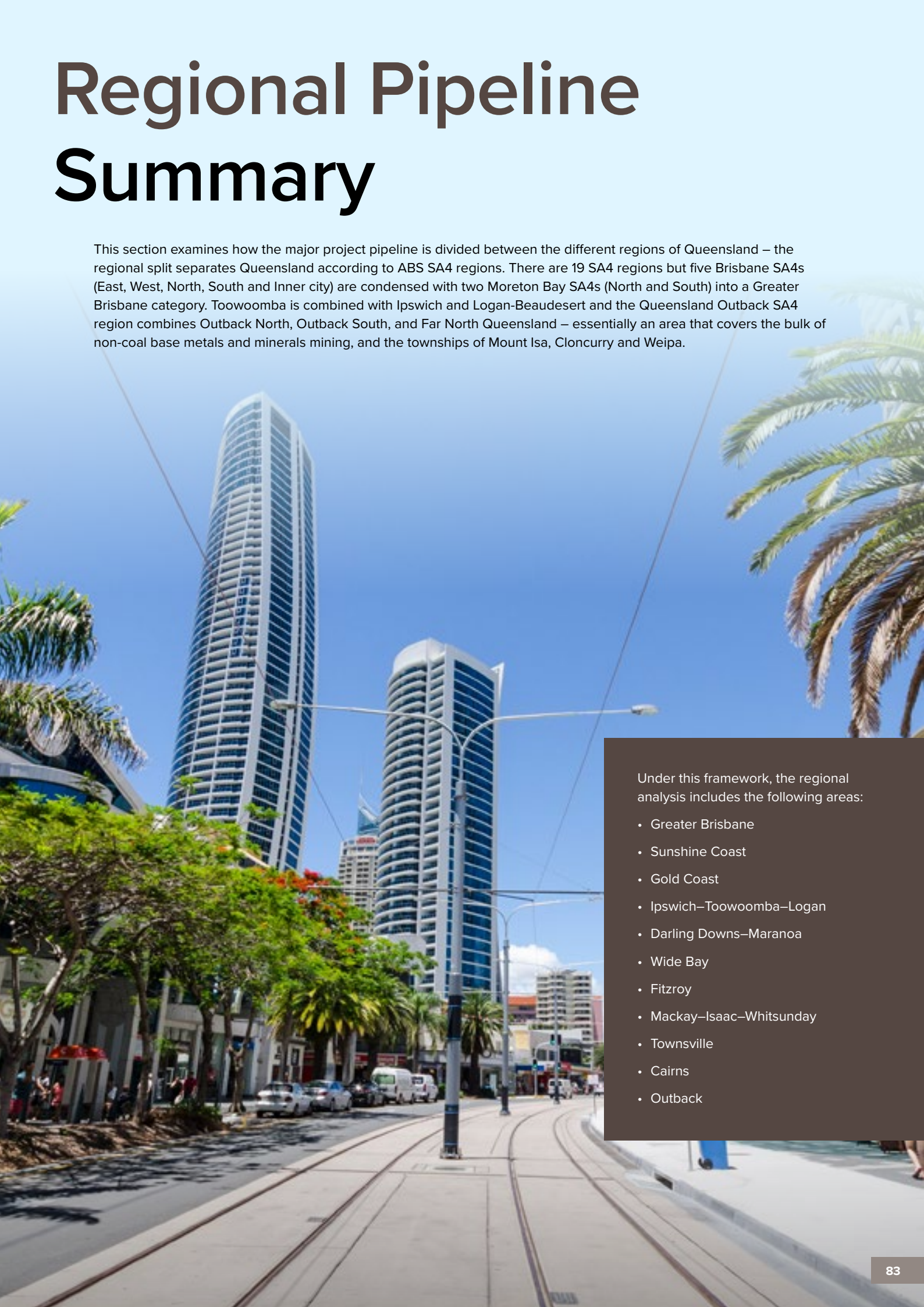
Source: QEAS, QMCA analysis

Key material requirements per year:

Material	Max annual demand	Average annual demand
Concrete	187,000m^3	138,000m^3
Precast concrete	176,500m^2	130,000m^2
Structural steel	13,600t	10,000t
Reinforcing steel	20,600t	15,200t
Aggregate	224,000t	165,000t

Regional Pipeline Summary

This section examines how the major project pipeline is divided between the different regions of Queensland – the regional split separates Queensland according to ABS SA4 regions. There are 19 SA4 regions but five Brisbane SA4s (East, West, North, South and Inner city) are condensed with two Moreton Bay SA4s (North and South) into a Greater Brisbane category. Toowoomba is combined with Ipswich and Logan-Beaudesert and the Queensland Outback SA4 region combines Outback North, Outback South, and Far North Queensland – essentially an area that covers the bulk of non-coal base metals and minerals mining, and the townships of Mount Isa, Cloncurry and Weipa.

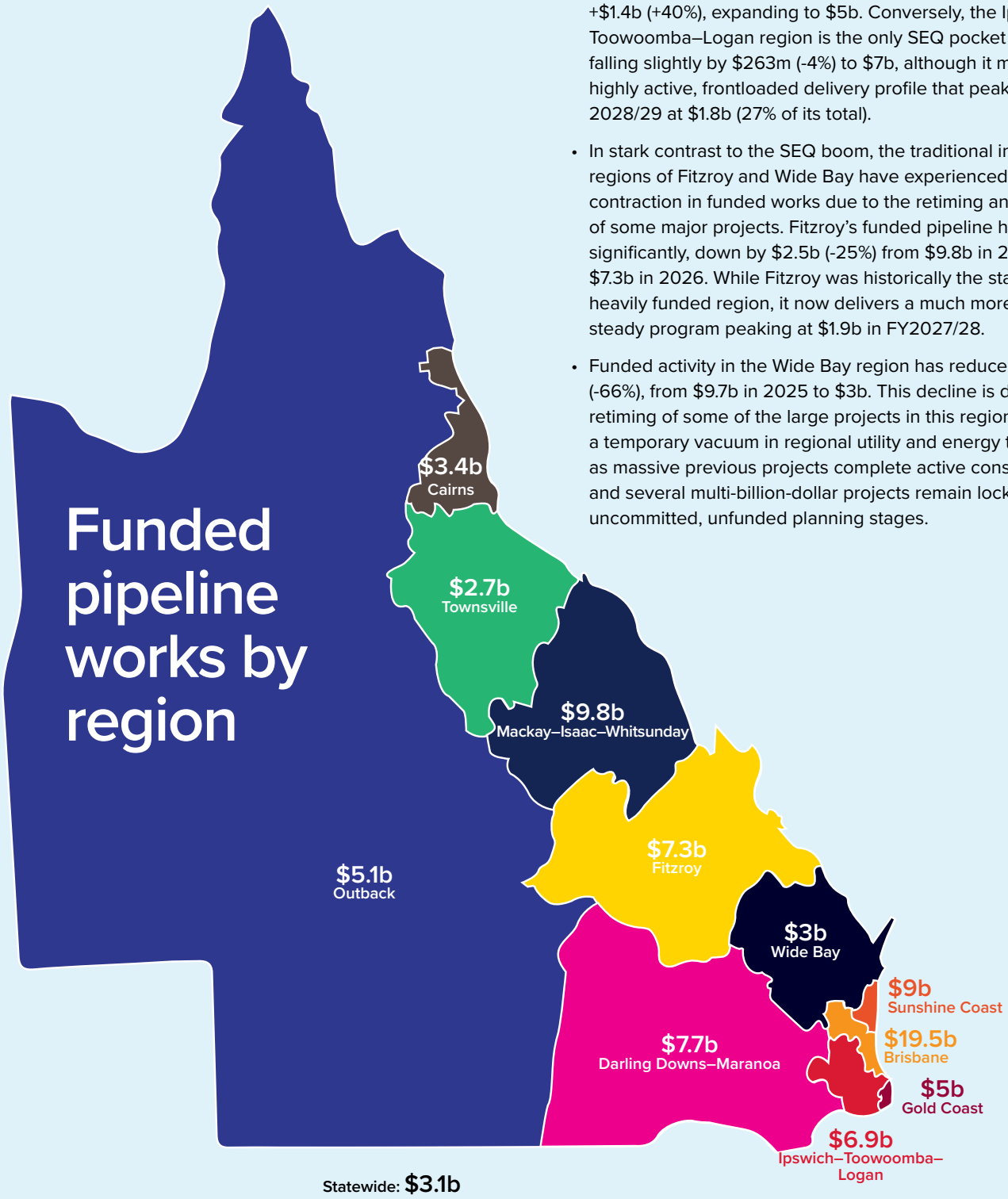


Under this framework, the regional analysis includes the following areas:

- Greater Brisbane
- Sunshine Coast
- Gold Coast
- Ipswich–Toowoomba–Logan
- Darling Downs–Maranoa
- Wide Bay
- Fitzroy
- Mackay–Isaac–Whitsunday
- Townsville
- Cairns
- Outback

Key points

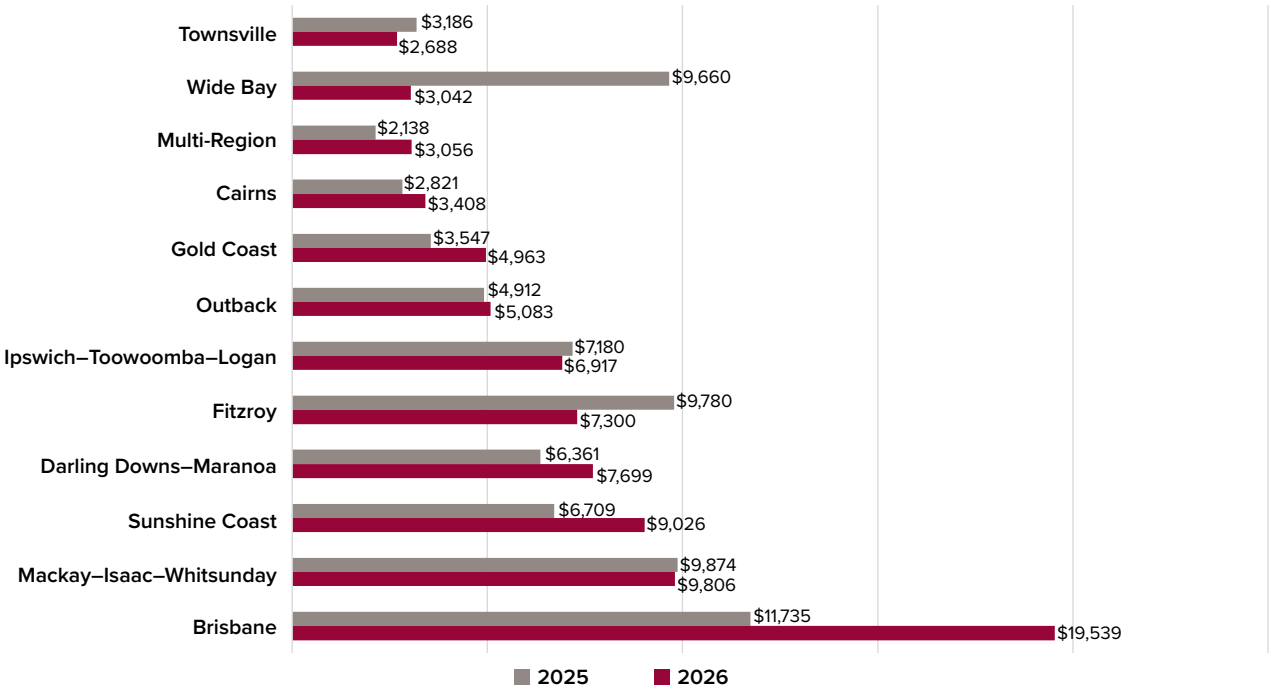
- The regional breakdown reveals a realignment of capital investment, particularly the funded works, between the 2025 and 2026 Reports. The distribution of the state's $82.5b major project pipeline shows a noticeable shift towards SEQ with investment moving away from traditional regional industrial heavyweights and pouring heavily into Greater Brisbane, Ipswich–Toowoomba–Logan, Sunshine Coast and Gold Coast.
- The SEQ corner has consolidated its position as the state's major project region, collectively commanding a massive $40.5b (49% of the total state funded pipeline).
- Greater Brisbane acts as the engine of this surge, with its funded pipeline increasing by $7.8b (a +67% increase) to reach $19.5b (24% of the entire state funded pipeline). This increase is heavily concentrated in the outer years of the decade, with annual work peaking at $5.3b (27% of Brisbane's total) in 2029/30, before tapering to $3.2b (16%) in 2030/31.
- This expansion is mirrored in the Sunshine Coast, which grew by +$2.3b (+35%) to $9b, peaking at $2.1b in fiscal year 2028/29 as major transport upgrades and early 2032 Games sporting venues move into committed budgets.
- The Gold Coast also experienced substantial growth of +$1.4b (+40%), expanding to $5b. Conversely, the Ipswich–Toowoomba–Logan region is the only SEQ pocket to contract, falling slightly by $263m (-4%) to $7b, although it maintains a highly active, frontloaded delivery profile that peaks early in 2028/29 at $1.8b (27% of its total).
- In stark contrast to the SEQ boom, the traditional industrial regions of Fitzroy and Wide Bay have experienced a contraction in funded works due to the retiming and status of some major projects. Fitzroy's funded pipeline has fallen significantly, down by $2.5b (-25%) from $9.8b in 2025 to just $7.3b in 2026. While Fitzroy was historically the state's most heavily funded region, it now delivers a much more modest, steady program peaking at $1.9b in FY2027/28.
- Funded activity in the Wide Bay region has reduced by -$6.6b (-66%), from $9.7b in 2025 to $3b. This decline is due to the retiming of some of the large projects in this region. It creates a temporary vacuum in regional utility and energy transitions, as massive previous projects complete active construction and several multi-billion-dollar projects remain locked in uncommitted, unfunded planning stages.



Statewide: **$3.1b**

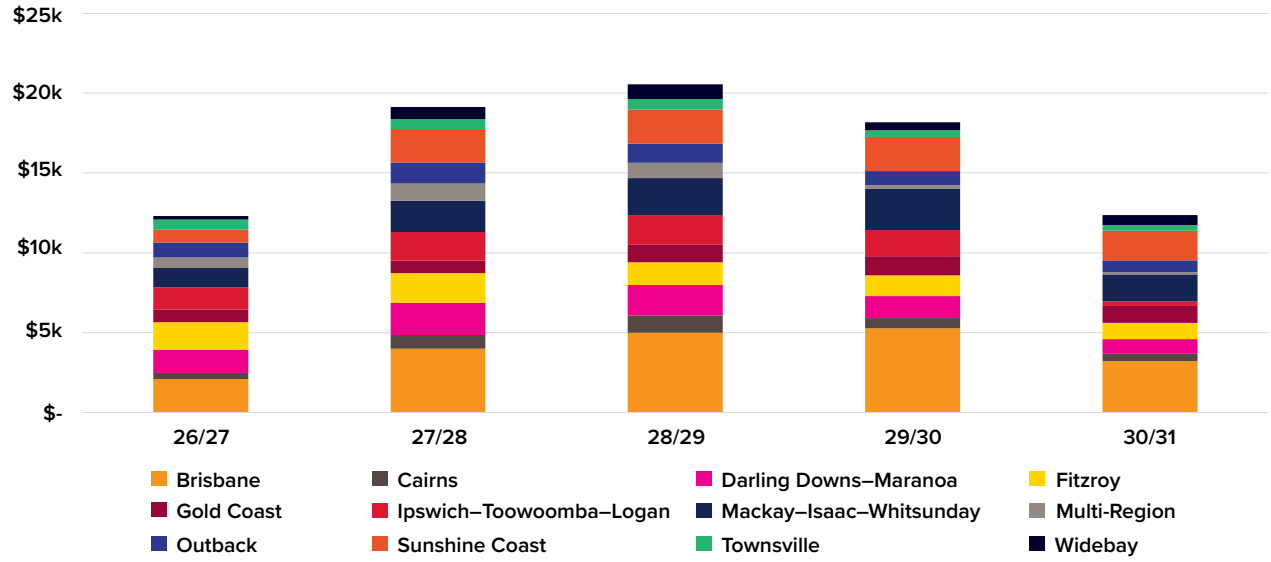
- Meanwhile, other regional resource and commodity hubs have held firm, showing stable or positive funding adjustments. Mackay–Isaac–Whitsunday remains the second-largest regional pipeline in the state, down slightly -$68m (or -0.7%) to $9.8b. Its peak construction activity is heavily backloaded, peaking at $2.6b in 2029/30, driven by substantial and resilient resources and heavy industry commitments.
- Darling Downs–Maranoa has also grown by +$1.3b (+21%) to $7.7b, peaking early in 2027/28 at $2b on the back of regional solar farm and CSG development. Outback Queensland remains highly stable at $5.1b, showing a modest gain of $171m (+4%) and sustaining steady activity around major transmission lines. On the northern coast, Cairns has increased by +$587m (+21%) to $3.4b due to committed regional ring roads and related projects, while Townsville fell by -$498m (-16%) to $2.7b.
- Ultimately, this regional skew sets up two parallel market environments. In SEQ and Mackay–Isaac–Whitsunday, the massive outer-year peaks in FY2028/29 and 2029/30 could trigger intense localised market overheating, causing shortages in labour and materials and driving up project costs.
- Simultaneously, the changes in funded works in some of the other regional areas such as Fitzroy and Wide Bay reinforces the need to ensure sustainable pipelines of work, particularly through converting unfunded projects into funded works.

Funded major project outlook ($m) by region: 2025 QMPPR v 2026 QMPPR



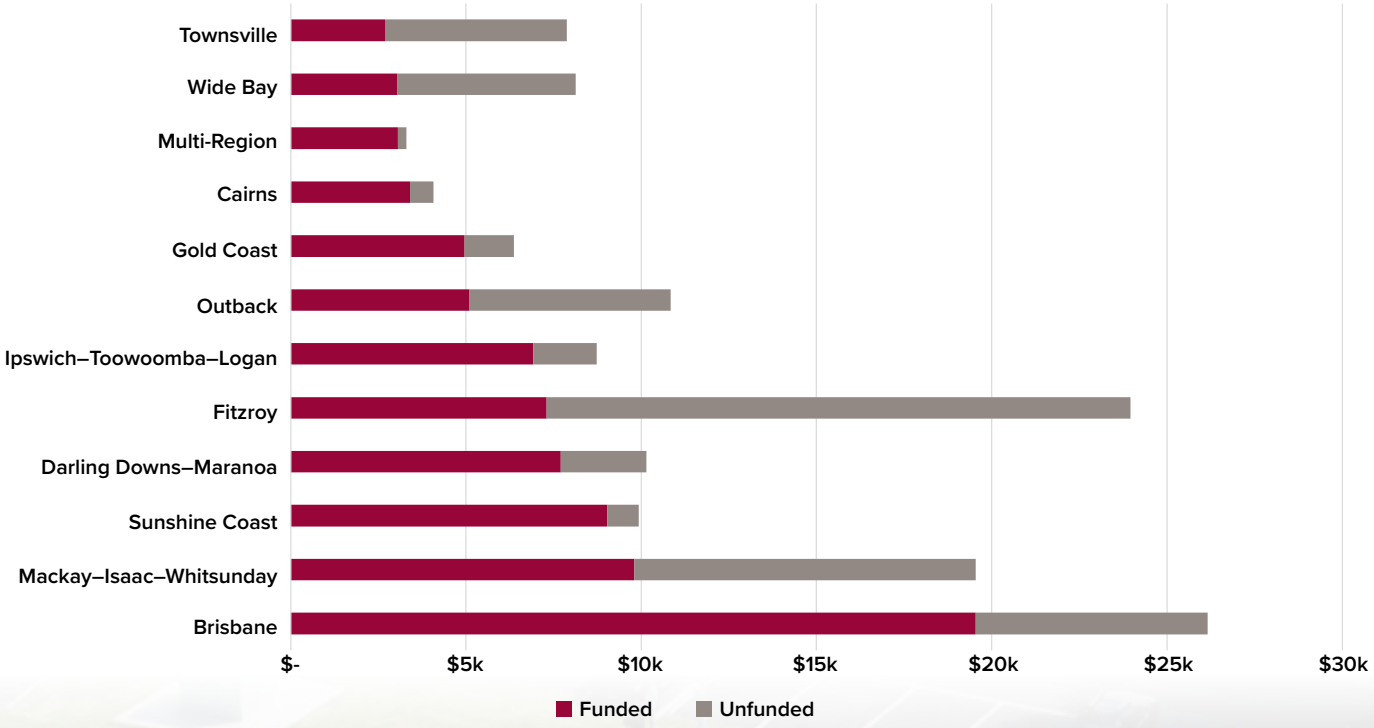
Source: QEAS, QMCA analysis

Funded major project work by sector ($m)



Source: QEAS, QMCA analysis

2026 QMPPR funded and unfunded major projects ($m)



Source: QEAS, QMCA analysis



Greater Brisbane

Population:
1,993,997

Sectors driving growth:
roads and bridges; rail; 2032 Games

Funded pipeline size:
$19.5b

Unfunded pipeline size:
$6.6b



Proportion of regional work unfunded

Key funded projects:

- Bruce Highway – Anzac Avenue to Uhlmann Road, $623m
- Bruce Highway – Gateway Motorway – Dohles Rocks Rd Stage 1, $713m
- Gateway Motorway – Bruce Highway Stage 1: Telegraph Rd to Pine River, $1.2b
- Brisbane Airport Upgrade (Parking and Access Upgrades), $578m
- Logan Motorway – Western Upgrade, $700m
- Story Bridge Restoration Program Stage 1, $1.1b
- Cross River Rail – various packages $7.7b
- North Pine Dam, $756m
- Luggage Point Sewerage Scheme, $500m
- Brendale SuperNode Battery & Data Centre, $500m
- 2032 Games Program ($10.6b) including
  - Permanent Venues and Facilities ($5.2b) including:
    - Brisbane Stadium
    - Aquatic Centre
    - Various minor venues
  - Brisbane Athletes Village and Brisbane Arena
  - Temporary Infrastructure and Overlay

Key unfunded projects:

- Brisbane Metro Extensions (North, East & Airport)
- North Brisbane Tunnel
- Ampol – Brisbane Renewable Fuels

Average annual labour requirement:

- Funded projects: ~5,680 people
- Total pipeline: 6,700 people

Key material requirements per year:

Material	Max annual demand	Average annual demand
Concrete	400,000m^3	317,000m^3
Precast concrete	260,000m^2	184,000m^2
Structural steel	47,000t	39,000t
Reinforcing steel	32,000t	25,000t
Aggregate	11.5Mt	7.9Mt

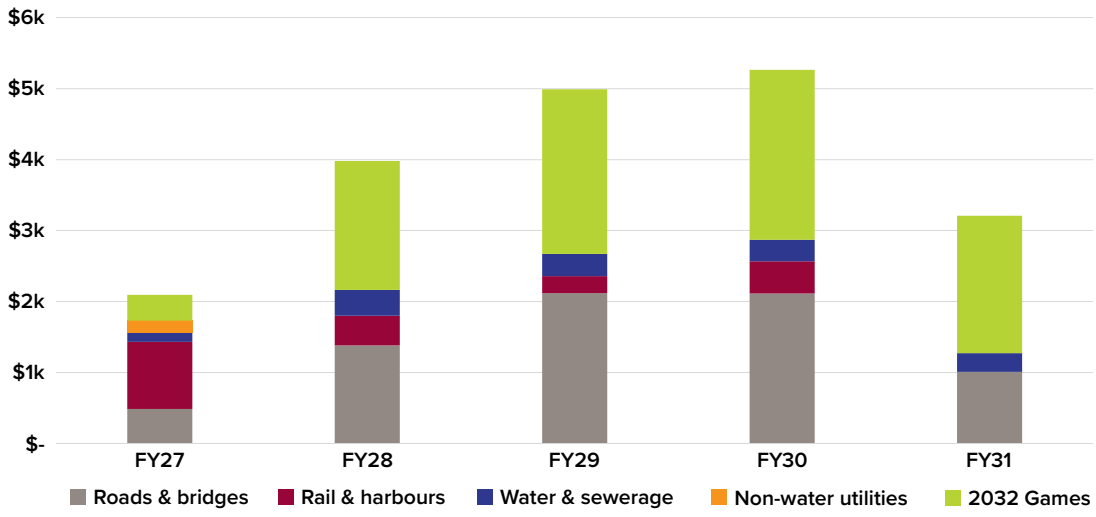
Outlook:

Brisbane has the highest funded major project pipeline at $19.5b (up from $11.7b in the 2025 Report) and an unfunded percentage of its total $26.2b pipeline at 25% below the state average of 41%. Key segments across the next five years will be roads and bridges and, unsurprisingly, the 2032 Games. Brisbane's major project activity will peak at $5.3b in 2029/30 and will average $3.9b each year across the five-year pipeline period.

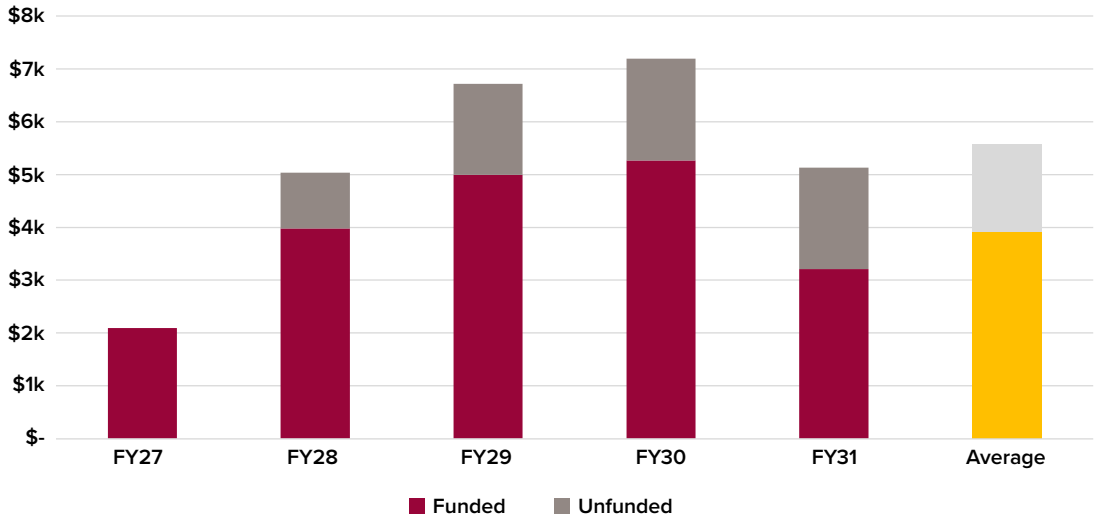




Funded major project pipeline by sector ($m)



Funded v unfunded pipeline ($m)



Source: QEAS, QMCA analysis



Gold Coast

Population:
708,085

Sectors driving growth:
roads and bridges; 2032 Games

Funded pipeline size:
$5b

Unfunded pipeline size:
$1.4b



Proportion of regional work unfunded

Key funded projects:
- Coomera Connector Stage 1 – Central, $1.3b
- Coomera Connector Stage 1 – South, $400m
- Coomera Connector – Stage 2, $2b
- Coomera Connector Stage 1 – North, $840m
- Gold Coast Light Rail Stage 2b (Parklands – Harbour Town), $600m
- Gold Coast STP Infrastructure Development Program, $300m
- 2032 Games Program:
  - Gold Coast Athletes Village,
  - Gold Coast Arena

Key unfunded projects:
- M1 Pacific Motorway North: Daisy Hill to Logan Motorway
- Varsity Lakes to Elanora Extension
- Elanora to Coolangatta extension
- Gold Coast Light Rail Stage 4
- Gold Coast Desal Augmentation
- Advanced Resource Recovery Centre (Gold Coast W2E)

Average annual labour requirement:
- Funded works: 1,200 people
- Total pipeline: 1,600 people

Key material requirements per year:

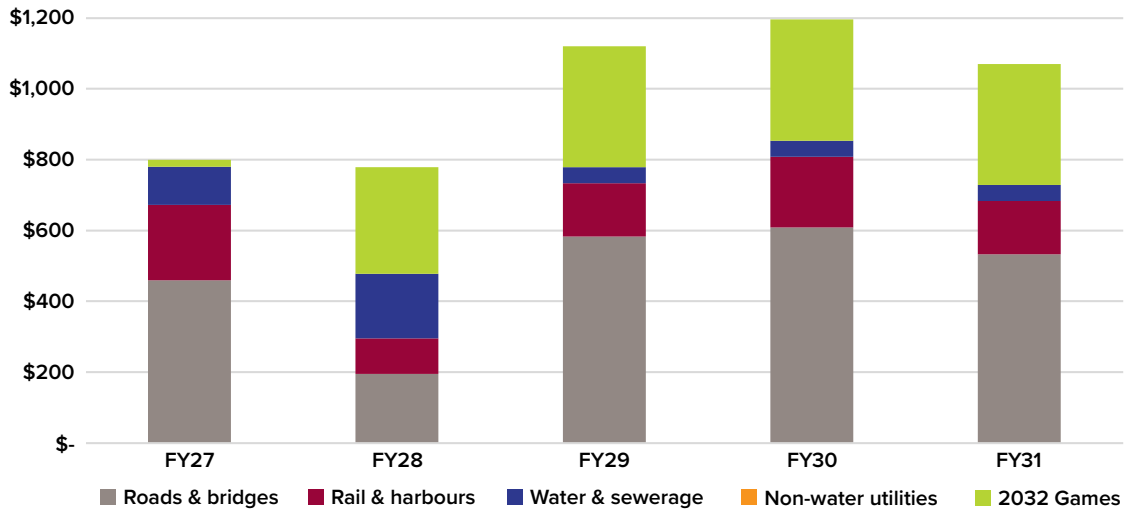
Material	Max annual demand	Average annual demand
Concrete	119,000m^3	79,000m^3
Precast concrete	56,000m^2	41,000m^2
Structural steel	15,000t	11,000t
Reinforcing steel	8,100t	5,800t
Aggregate	3.2Mt	2.2Mt

Outlook:
While the Gold Coast has the fourth-lowest funded major project pipeline at $5b, its unfunded work profile has increased from the 2025 Report ($3.5b) and the unfunded percentage of its total $6.4b pipeline is at 22% below the state average of 41%. Key segments across the next five years will be roads and bridges and the 2032 Games. Gold Coast's major project activity will peak at $1.2b in 2029/30 and will average $992.7m each year across the five-year pipeline period.

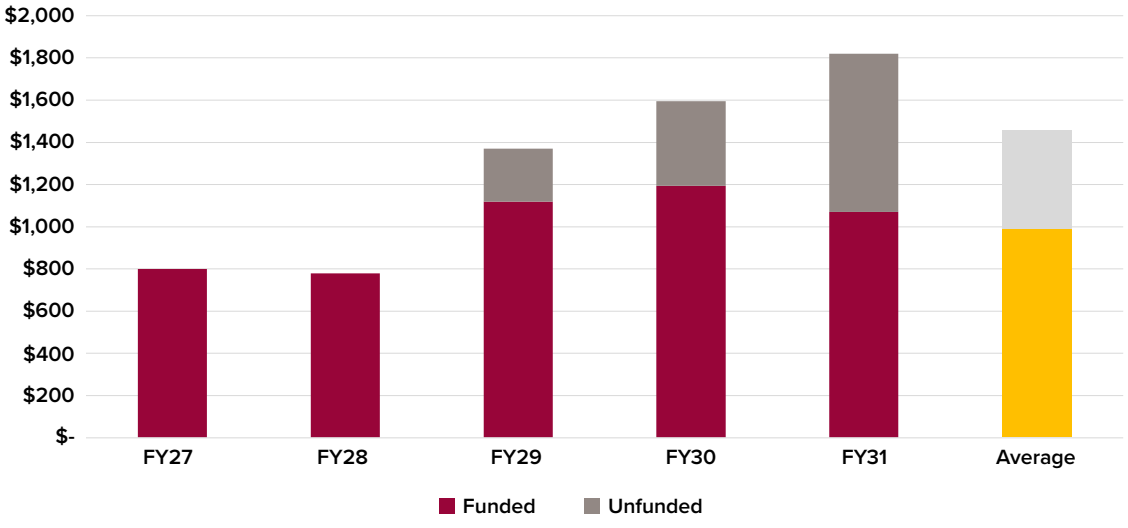




Funded major project pipeline by sector ($m)



Funded v unfunded pipeline ($m)



Source: QEAS, QMCA analysis



Sunshine Coast

Population:
441,508

Sectors driving growth:
roads and bridges; rail; 2032 Games

Funded pipeline size:
$9b

Unfunded pipeline size:
$898m



Proportion of regional work unfunded

Key funded projects:

- The Wave Program:
  - The Wave – Stage 1a Direct Sunshine Coast Line (Beerwah to Caloundra), $850m
  - The Wave – Stage 1b Direct Sunshine Coast Line (Beerwah to Caloundra), $2.5b
  - The Wave – Stage 2 Direct Sunshine Coast Line (Caloundra to Birtinya), $1.4b
  - Sunshine Motorway – Mooloolah River Interchange Stage 2, $595m
  - The Wave – Stage 3 BRT Infrastructure (Birtinya to Maroochydore), $1b
- Beerburrum to Nambour Rail Upgrade (Stage 1), $800m
- Lake MacDonald Dam Upgrade, $320m
- 2032 Games Program:
  - Sunshine Coast Arena and Athletes Village
  - Sunshine Coast Stadium
  - Sunshine Coast Mountain Bike Facility

Key unfunded projects:

- Beerburrum to Nambour Duplication (Stage 2)
- Northern Pipeline Interconnector (NPI3)

Average annual labour requirement:

- Funded works: 2,500 people
- Total pipeline: 2,800 people

Key material requirements per year:

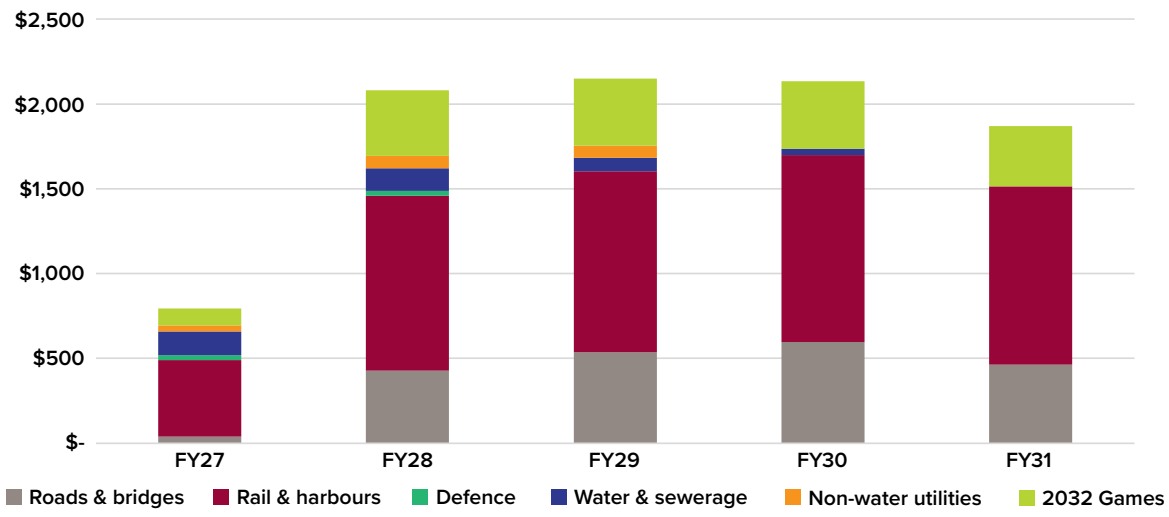
Material	Max annual demand	Average annual demand
Concrete	90,000m^3	71,000m^3
Precast concrete	86,000m^2	76,500m^2
Structural steel	39,000t	32,800t
Reinforcing steel	11,600t	9,400t
Aggregate	5.9Mt	4.6Mt

Outlook:
The Sunshine Coast is undergoing significant investment over the next five-plus years with the funded major project pipeline at $9b (well up from $6.7b in the 2025 Report) and an unfunded percentage of its total $9.9b pipeline at 9% below the state average of 41%. Key segments across the next five years will be roads and bridges; rail and the 2032 Games. Sunshine Coast's major project activity will peak at $2.1b in 2029/30 and will average $1.8b each year across the five-year pipeline period.

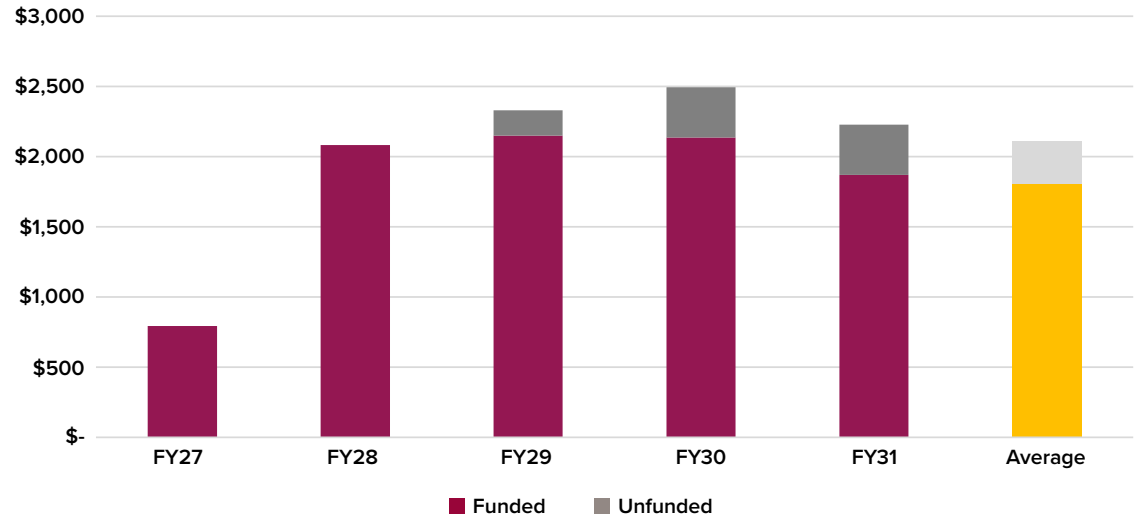




Funded major project pipeline by sector ($m)



Funded v unfunded pipeline ($m)



Source: QEAS, QMCA analysis



Ipswich–Toowoomba–Logan

Population:
1,015,234

Sectors driving growth:
roads and bridges; rail and harbours; water and sewerage

Funded pipeline size:
$6.9b

Unfunded pipeline size:
$1.8b



Proportion of regional work unfunded

Key funded projects:

- Ipswich Motorway; Rocklea to Darra Stage 2 – Oxley to Darra, $390m
- Warrego Highway Upgrades between Ipswich and Toowoomba, $345m
- Cunningham Highway Upgrade, $261m
- Logan and Gold Coast Faster Rail (Main Line Upgrade), $3.2b
- Logan and Gold Coast Faster Rail (Level Crossing Removals), $500m
- RAAF Base Amberley – Ongoing Expansion and Capability Projects, $565m
- Somerset Dam Upgrade, $850m
- Wyaralong Dam WTP Stage 1, $870m
- Somerset Dam – Early Works, $355m
- Logan Water Infrastructure Program Alliance, $747m
- 2032 Games Program:
  - Toowoomba Showgrounds Upgrade

Key unfunded projects:

- Wivenhoe Dam Improvement
- Lockyer Valley and Somerset Water Security Scheme
- Big T Pumped Hydro Storage Project
- Lockyer Energy Project (Gas-Fired Firming Capacity)

Average annual labour requirement:

- Funded works: 1,600 people
- Total pipeline: 2,100 people

Key material requirements per year:

Material	Max annual demand	Average annual demand
Concrete	148,000m^3	105,000m^3
Precast concrete	63,000m^2	47,000m^2
Structural steel	32,000t	24,200t
Reinforcing steel	11,400t	8,500t
Aggregate	3.2Mt	2.4Mt

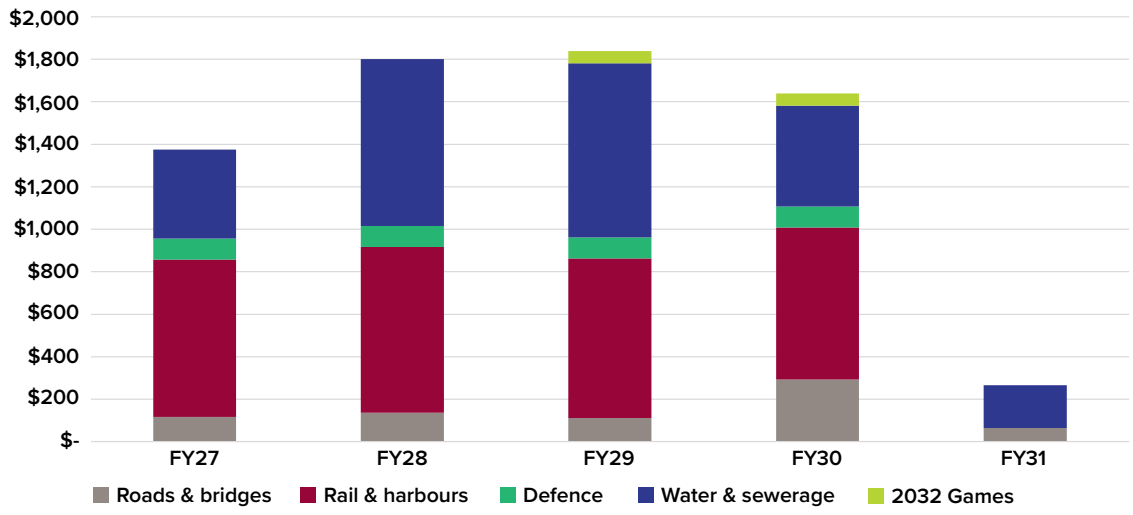
Outlook:

Ipswich–Toowoomba–Logan has the sixth-highest funded major project pipeline at $6.9b (down from $7.2b in the 2025 Report) and an unfunded percentage of its total $8.7b pipeline at 21% below the state average of 41%. Key segments across the next five years will be rail and harbours; and water and sewerage. Ipswich–Toowoomba–Logan's major project activity will peak at $1.8b in 2028/29 and will average $1.4b each year across the five-year pipeline period.

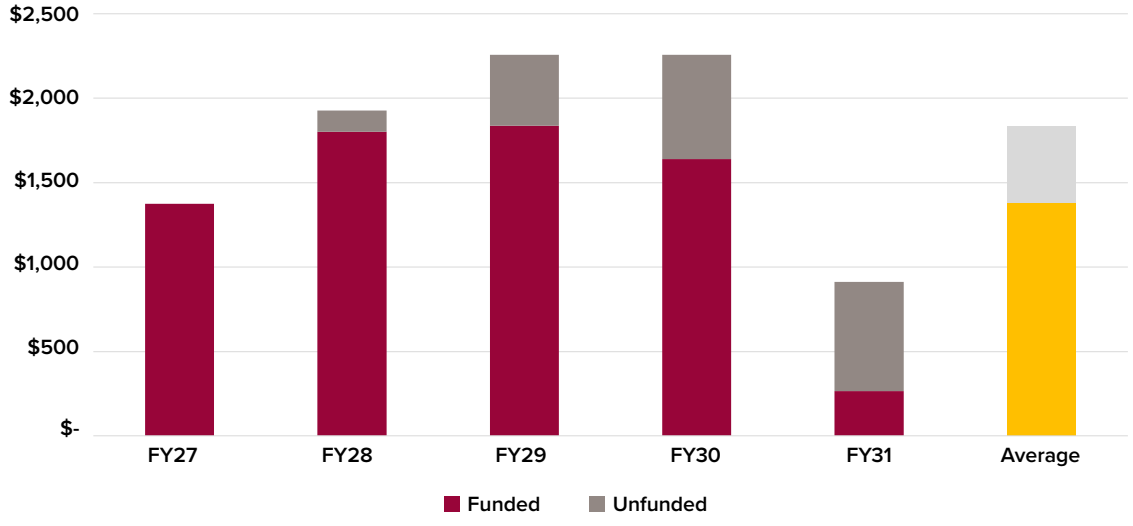




Funded major project pipeline by sector ($m)



Funded v unfunded pipeline ($m)



Source: QEAS, QMCA analysis



Darling Downs–Maranoa

Population:
134,169

Sectors driving growth:
non-water utilities; mining and heavy industry

Funded pipeline size:
$7.7b

Unfunded pipeline size:
$2.9b



Proportion of regional work unfunded

Key funded projects:
- Inland Freight Route (Mungindi to Charters Towers) Upgrades, $715m
- Bulli Creek Solar Farm $675m
- Wandoan South Solar Stage 2 $388m
- Wambo Wind Farm – Stage 1 and 2, $274m
- Renewable Energy Zone Transmission (Western Downs), $895m
- Australia Pacific LNG Upstream Field Development (Sustaining works) $2b
- Surat Gas Project (Phases 2-5), $6.8b
- New Acland Stage 3 project, $445m

Key unfunded projects:
- Herries Range Wind Farm
- Arcadia Valley CSG Development
- Renewable Energy Zone Transmission (Southern Downs)
- Goombi Wind Farm

Average annual labour requirement:
- Funded works: 1,800 people
- Total pipeline: 2,700 people

Key material requirements per year:

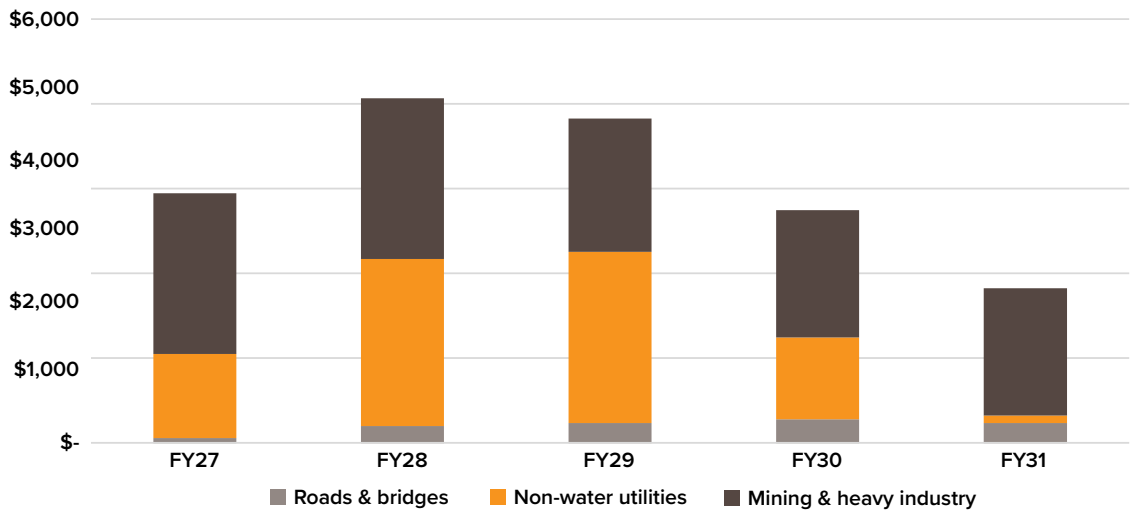
Material	Max annual demand	Average annual demand
Concrete	393,000m^3	303,000m^3
Precast concrete	6,500m^2	4,200m^2
Structural steel	58,000t	45,000t
Reinforcing steel	23,000t	17,400t
Aggregate	1.4Mt	0.8Mt

Outlook:
Darling Downs–Maranoa has the fourth-highest funded major project pipeline of 11 regions at $7.7b (up from $6.4b in the 2025 Report) and an unfunded percentage of its total $10.6b pipeline at 28% below the state average of 41%. Key segments across the next five years will be mining and heavy industry; and non-water utilities. Darling Downs–Maranoa's major project activity will peak at $2b in 2027/28 and will average $1.5b each year across the five-year pipeline period.

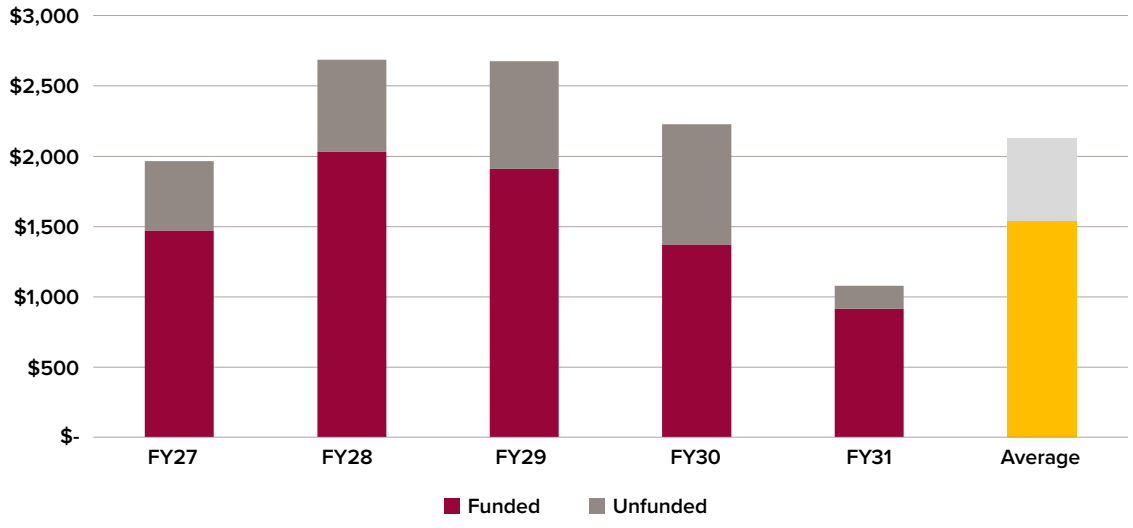




Funded major project pipeline by sector ($m)



Funded v unfunded pipeline ($m)



Source: QEAS, QMCA analysis



Fitzroy

Population:
262,859

Sectors driving growth:
non-water utilities; mining and heavy industry

Funded pipeline size:
$7.3b

Unfunded pipeline size:
$16.7b

Proportion of regional work unfunded

Key funded projects:

- Bruce Highway – Rockhampton Ring Road (North & South Packages) Stage 2, $851m
- Bruce Highway Targeted Safety Program, Gympie to Cairns (Central Section), $1.8b
- Bruce Highway – Rockhampton Ring Road (North & South Packages) Stage 1, $361m
- Fitzroy to Gladstone Water – Pipeline and Water Treatment Plant, $688m
- Theodore Wind Farm Stage 1, $500m
- Boulder Creek Wind Farm, $429m
- Central QLD Gas-Fired Generation Power Station, $448m
- Bowen Gas Project, $847m
- Corvus Metallurgical Coal Project, $902m
- 2032 Games Program:
  - Rockhampton Athletes Village
  - Rockhampton Flatwater Rowing Facility

Key unfunded projects:

- Moura – Aldoga Link Project (Wiggins)
- Port of Gladstone – Second Shipping Lane
- Wiggins Island Coal Terminal (Stages 2 and 3)
- Awoonga Dam Spillway Upgrade
- Mount Hopeful Wind Farm
- Moah Creek Renewable Energy
- Boomer Green Energy Wind Farm
- Gladstone Energy and Ammonia Project
- H2-Hub Gladstone green hydrogen and ammonia production facility

Average annual labour requirement:

- Funded works: 1,500 people
- Total pipeline: 6,200 people

Key material requirements per year:

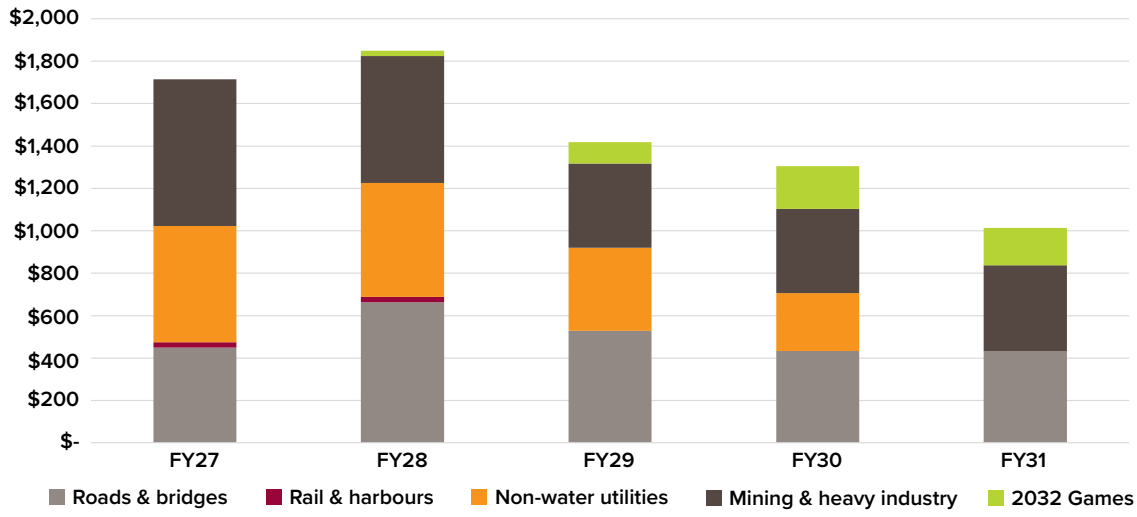
Material	Max annual demand	Average annual demand
Concrete	1,150,000m^3	910,000m^3
Precast concrete	32,700m^2	27,400m^2
Structural steel	158,000t	123,000t
Reinforcing steel	67,000t	53,400t
Aggregate	4Mt	3Mt

Outlook:

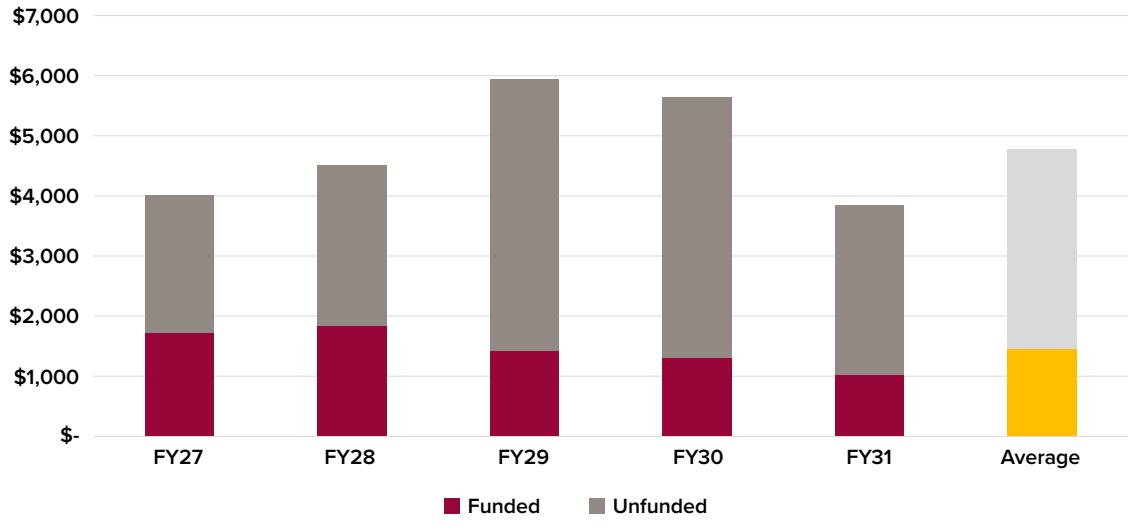
Fitzroy has the fifth-highest funded major project pipeline at $7.3b (down from $9.8 in the 2025 Report) and an unfunded percentage of its total $24b pipeline at 70% above the state average of 41%, which is the highest across the state. Key segments across the next five years will be roads and bridges; non-water utilities; and mining and heavy industry. Fitzroy's major project activity will peak at $1.8b in 2027/28 and will average $1.5b each year across the five-year pipeline period.



Funded major project pipeline by sector ($m)



Funded v unfunded pipeline ($m)



Source: QEAS, QMCA analysis



Outback

Population:
82,563

Sectors driving growth:
non-water utilities

Funded pipeline size:
$5.1b

Unfunded pipeline size:
$5.8b



Proportion of regional work unfunded

Key funded projects:
- Cooktown to Weipa Corridor Upgrade (Cape York Regional Package 2
- Copperstring Transmission Line (Eastern Link)
- Copperstring Transmission Line (Western Link)
- Kidston Pumped Hydro Storage Project, $544m
- Glenaras to Cooladdi pipeline, $1b
- Eva Copper Project, $502m
- St Elmo Vanadium Project, $292m

Key unfunded projects:
- Regional New Weirs Construction Package
- Northern Gas Pipeline Extension/ Expansion
- Northern Silica Project
- Richmond – Julia Creek Vanadium
- Julia Creek Project
- Vecco Critical Minerals Project (Stage 1)

Average annual labour requirement:
- Funded works: 830 people
- Total pipeline: 1,900 people

Outlook:
Outback has the seventh-highest funded major project pipeline out of 11 regions at $5.1b (up from $4.9b in the 2025 Report) and an unfunded percentage of its total $10.8b pipeline at 53% above the state average of 41%. Key segments across the next five years will be non-water utilities, and mining and heavy industry. Outback's major project activity will peak at $1.3b in 2027/28 and will average $1b each year across the five-year pipeline period.

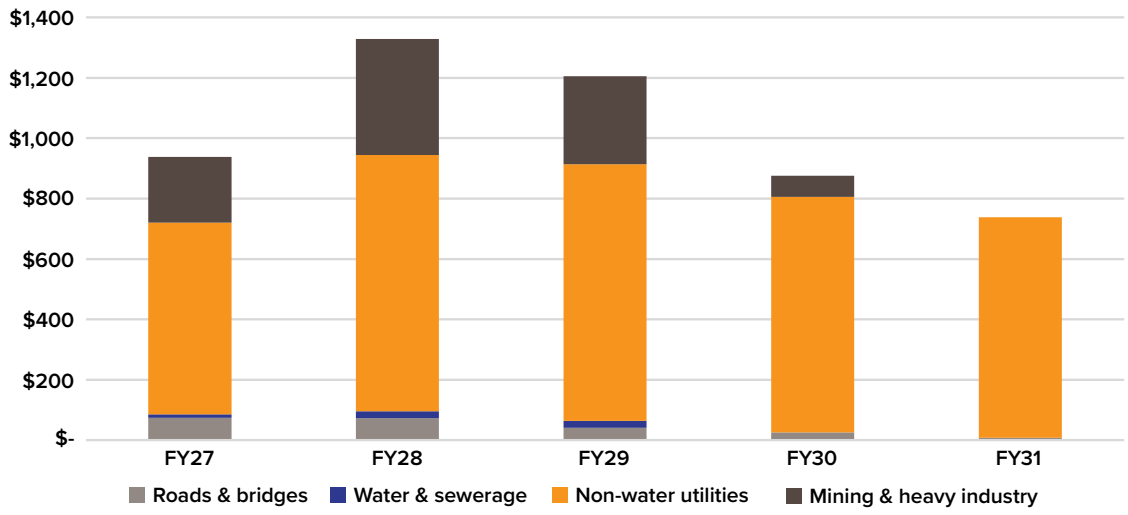
Key material requirements per year:

Material	Max annual demand	Average annual demand
Concrete	356,000m^3	280,000m^3
Precast concrete	3,600m^2	2,100m^2
Structural steel	92,000t	69,000t
Reinforcing steel	19,000t	14,900t
Aggregate	550,000t	480,000t

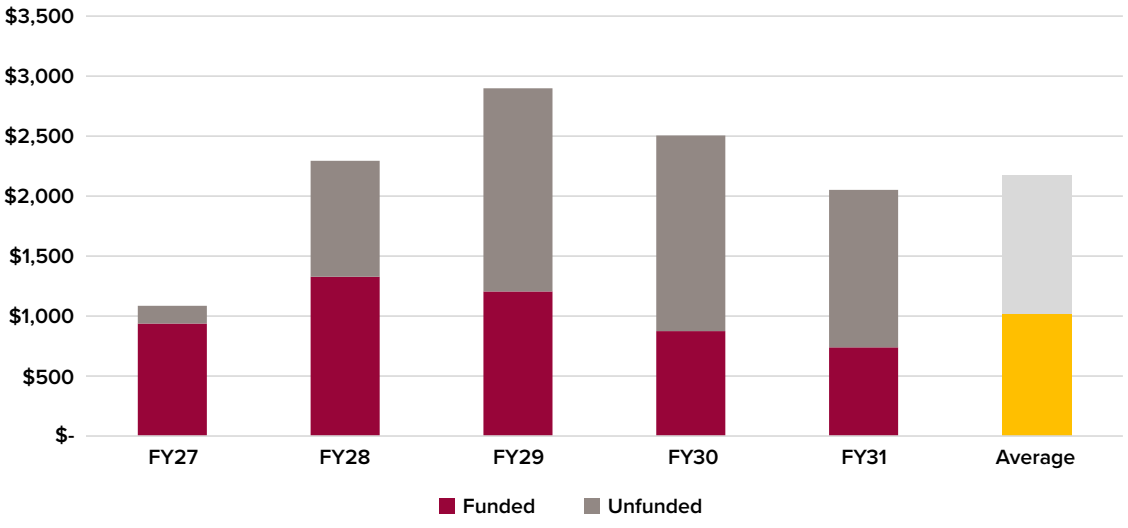




Funded major project pipeline by sector ($m)



Funded v unfunded pipeline ($m)



Source: QEAS, QMCA analysis



Townsville

Population:
249,097

Sectors driving growth:
road and bridges; defence

Funded pipeline size:
$2.7b

Unfunded pipeline size:
$5.2b



Proportion of regional work unfunded

Key funded projects:

- Tennant Creek to Townsville Corridor Upgrade – Queensland, $189m
- Bruce Highway Targeted Safety Program , Gympie to Cairns (Northern), $910m
- Port of Townsville Channel Capacity Expansion (Stage 2), $127m
- Herveys Range Facility Upgrade, $800m
- RAAF Townsville (Garbutt), $538m
- Greenvale Training Area Upgrade, $610m
- Haughton Pipeline Duplication Stage 2, $183m

Key unfunded projects:

- Townsville Port Expansion Project – Outer Harbour Expansion (berths 14+15)
- Burdekin Falls Dam – Raising
- Ross River Dam Remediation
- Burdekin- Bowen Pipeline
- Majors Creek Solar Project
- SCONI Scandium Project (Phase 1
- Townsville Energy Chemicals Hub (TECH) Project
- Sugarbag Hill UHPQS Project

Average annual labour requirement:

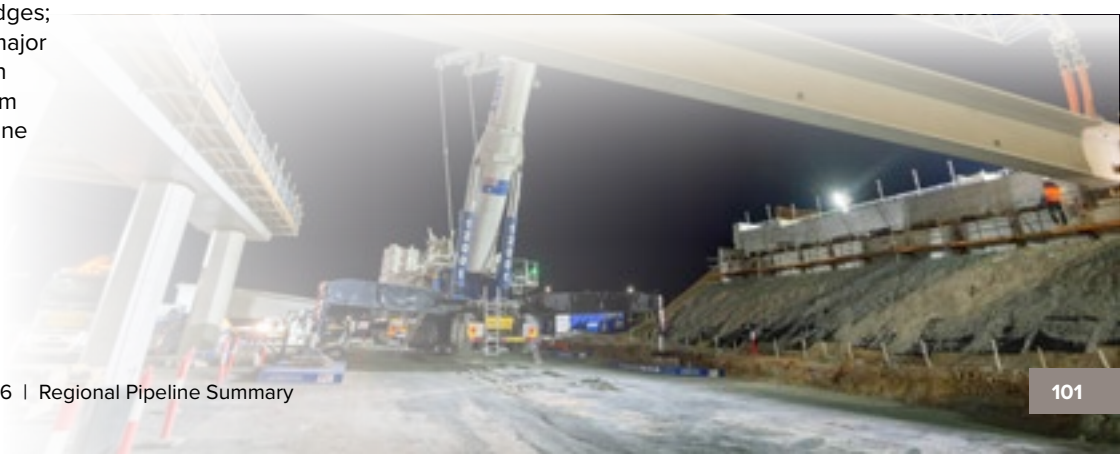
- Funded works: 650 people
- Total pipeline: 1,500 people

Outlook:

Townsville has the lowest funded major project pipeline of the 11 regions at $2.7b (down from $3.2b in the 2025 Report) and an unfunded percentage of its total $7.9b pipeline at 66% above the state average of 41%. This is the second highest unfunded percentage of all regions. Key segments across the next five years will be roads and bridges; and rail and harbours. Townsville's major project activity will peak at $652m in 2028/29 and will average just $538m each year across the five-year pipeline period.

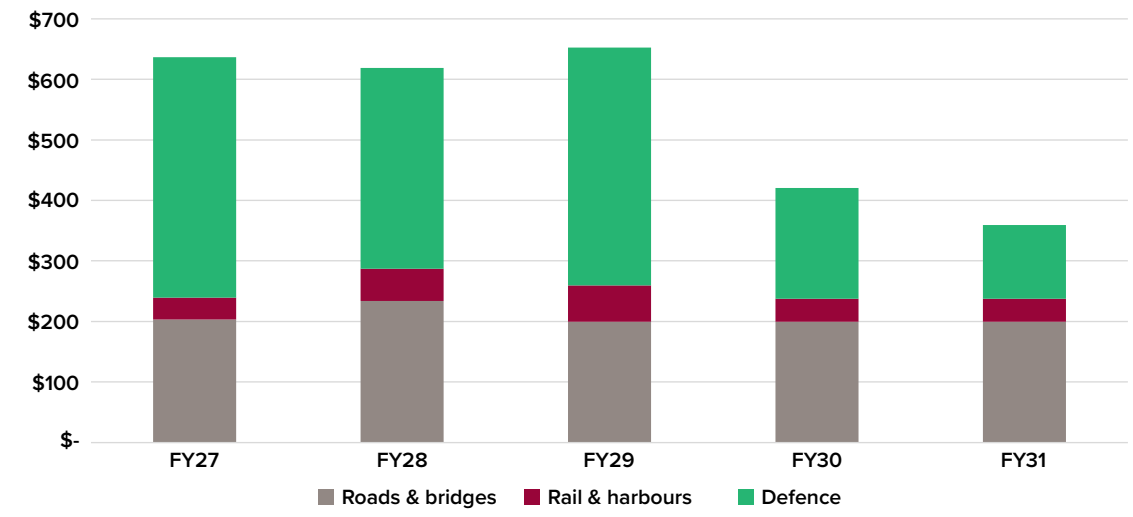
Key material requirements per year:

Material	Max annual demand	Average annual demand
Concrete	263,000m^3	178,000m^3
Precast concrete	31,000m^2	24,000m^2
Structural steel	37,100t	21,800t
Reinforcing steel	15,000t	10,500t
Aggregate	770,000t	710,000t

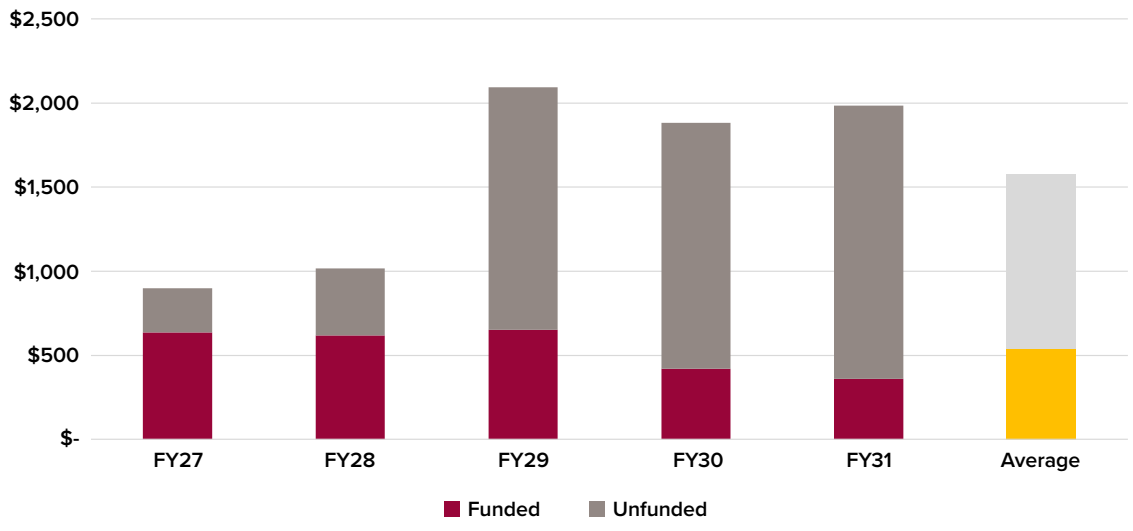




Funded major project pipeline by sector ($m)



Funded v unfunded pipeline ($m)



Source: QEAS, QMCA analysis



Wide Bay

Population:
335,670

Sectors driving growth:
roads and bridges; water and sewerage; non-water utilities

Funded pipeline size:
$3b

Unfunded pipeline size:
$5.1b



Proportion of regional work unfunded

Key funded projects:
- Bruce Highway – Tiaro Flood Immunity Upgrade, $400m
- Bruce Highway Targeted Safety Program, Gympie to Cairns (Wide Bay), $490m
- Forest Wind, $1b
- Tarong Battery Energy Storage System, $420m
- Meandu Thermal Coal Mine Life Extension, $109m

Key unfunded projects:
- Tarong West Wind Farm
- Borumba Pumped Hydro
- Mt Rawdon Pumped Hydro
- SuperGrid Stage 1

Average annual labour requirement:
- Funded works: 780 people
- Total pipeline: 1,860 people

Outlook:
Wide Bay has the second-lowest funded major project pipeline of the 11 regions at $3b (down from $9.7b in the 2025 Report) and an unfunded percentage of its total $8.1b pipeline at 63%, well above the state average of 41% – the third highest percentage of all regions. Key segments across the next five years will be roads and bridges; water and sewerage; and non-water utilities (electricity). Wide Bay's major project activity will peak at $921m in 2028/29 and will average $608m each year across the five-year pipeline period.

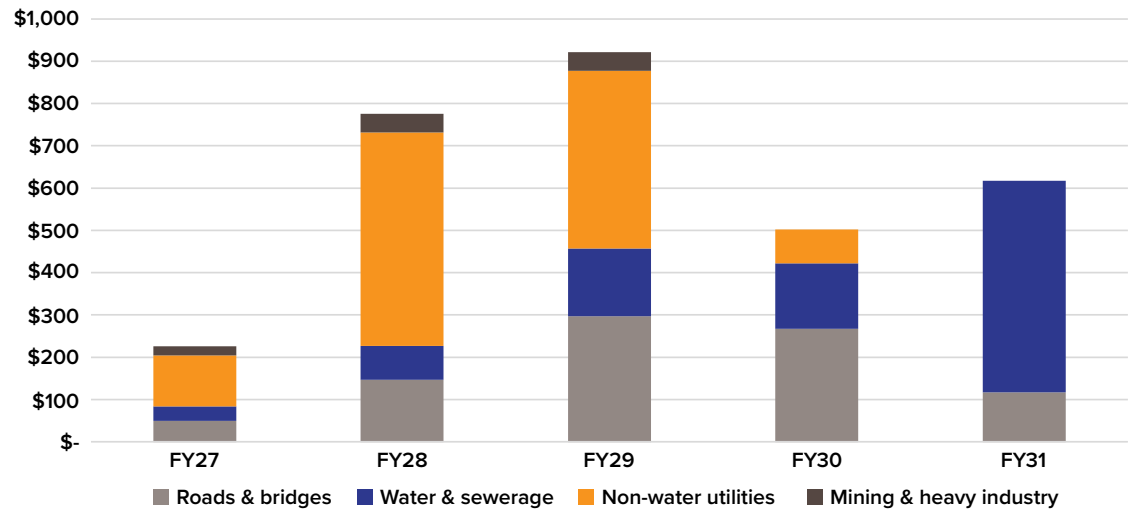
Key material requirements per year:

Material	Max annual demand	Average annual demand
Concrete	680,000m^3	267,000m^3
Precast concrete	23,000m^2	12,700m^2
Structural steel	86,000t	36,000t
Reinforcing steel	37,000t	16,600t
Aggregate	2.3Mt	1.3Mt

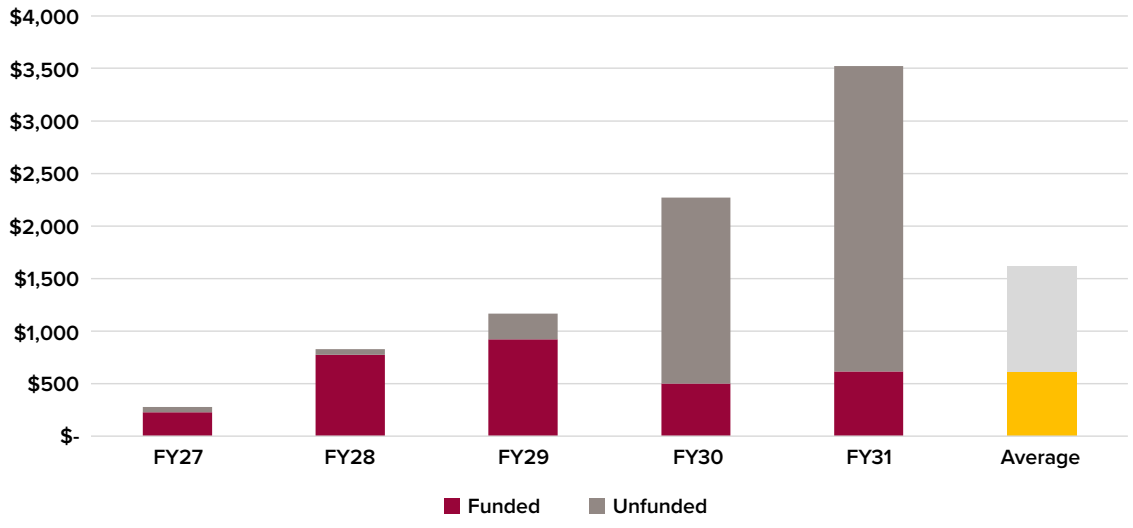




Funded major project pipeline by sector ($m)



Funded v unfunded pipeline ($m)



Source: QEAS, QMCA analysis



Cairns

Population:
271,408

Sectors driving growth:
roads and bridges; rail and harbours; non-water utilities

Funded pipeline size:
$3.4b

Unfunded pipeline size:
$661m



Proportion of regional work unfunded

Key funded projects:
- Cairns Western Arterial Road – Redlynch Connector Road to Captain Cook Highway, Duplication, $230m
- Captain Cook Highway – Cairns CBD to Smithfield, Upgrade (Cairns Ring Road), $244m
- Bruce Highway Targeted Safety Program, Gympie to Cairns (Far North), $1.1b
- Barron River Gorge Bridge Replacement, $339m
- Cairns Port Ship Lift & Marine Precinct, $500m
- The Cairns Water Security Stage 1, $250m
- Renewable Energy Zone Transmission (Far North Queensland), $504m
- 2032 Games Program:
  - Barlow Park Upgrade

Key unfunded projects:
- Lakeland Wind Farm
- Desailly Renewable Energy Park

Average annual labour requirement:
- Funded works: 630 people
- Total pipeline: 790 people

Key material requirements per year:

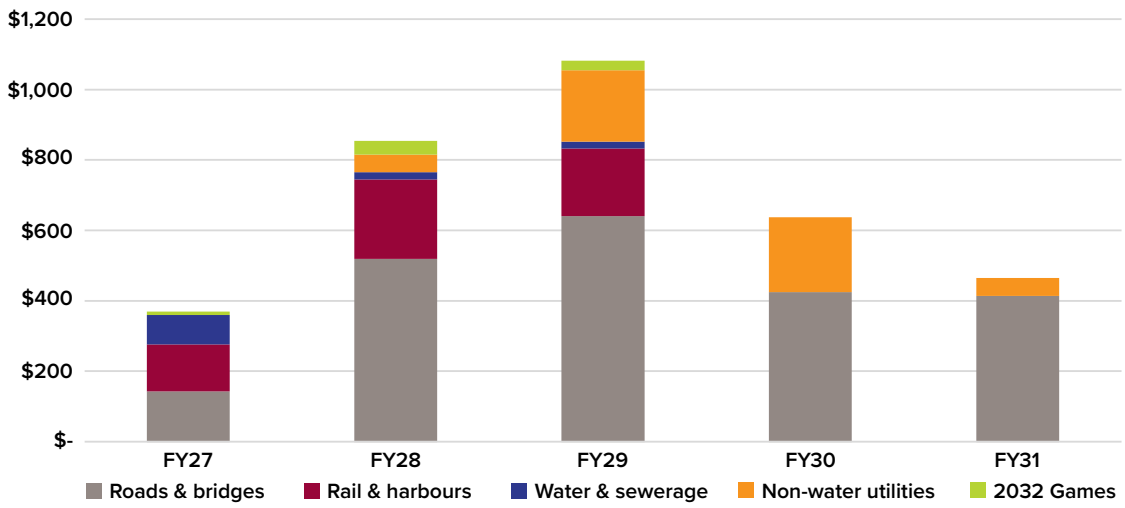
Material	Max annual demand	Average annual demand
Concrete	116,100m^3	66,400m^3
Precast concrete	30,300m^2	19,700m^2
Structural steel	15,700t	9,900t
Reinforcing steel	8,600t	5,100t
Aggregate	2.5Mt	1.7Mt

Outlook:
Cairns has the third-lowest funded major project pipeline at $3.4b (up from $2.8b in the 2025 Report) and an unfunded percentage of its total $4.1b pipeline at 16%, well below the state average of 41%. Key segments across the next five years will be roads and bridges; and rail and harbours. Cairns' major project activity will peak at $1.1b in 2028/29 and will average $681.6m each year across the five-year pipeline period.

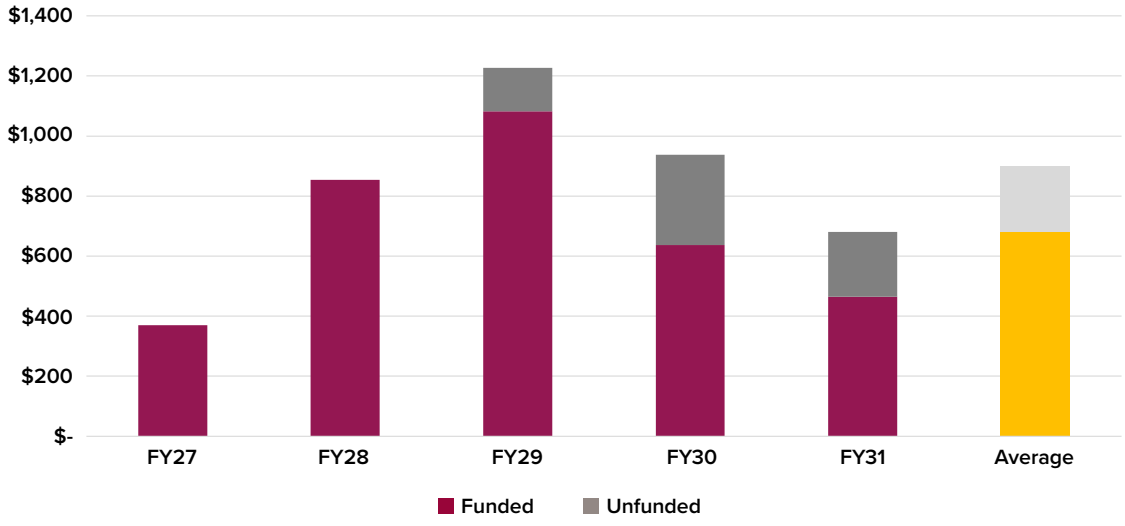




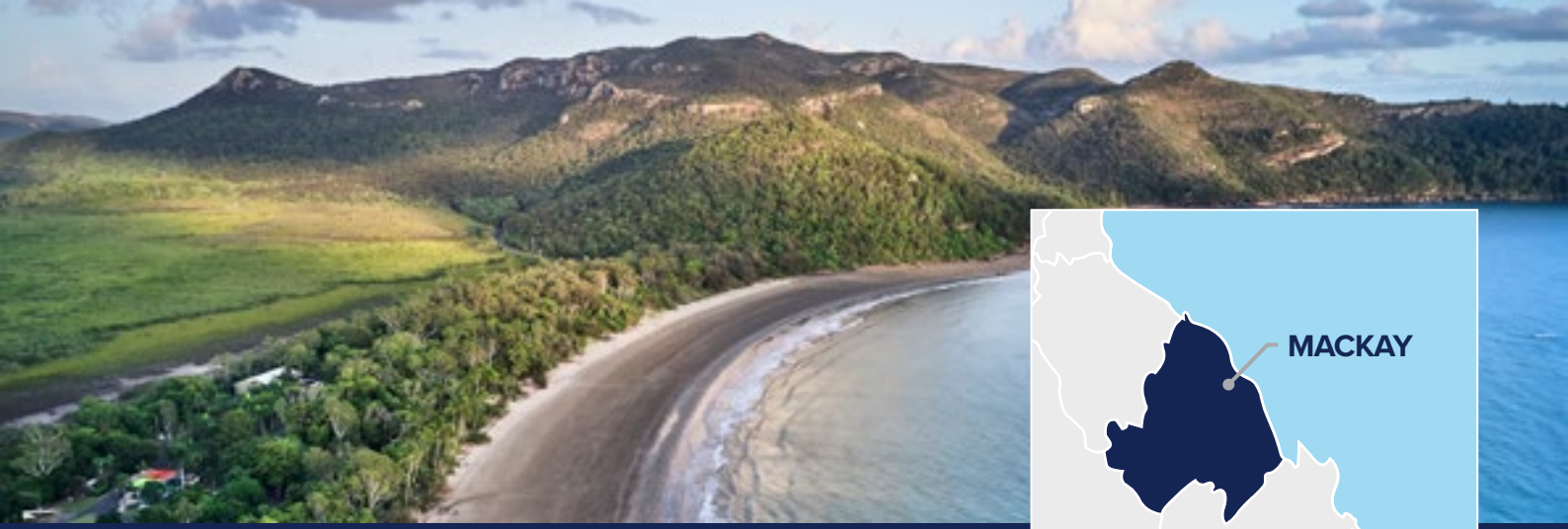
Funded major project pipeline by sector ($m)



Funded v unfunded pipeline ($m)



Source: QEAS, QMCA analysis



Mackay–Isaac–Whitsunday

Population:
193,813

Sectors driving growth:
roads and bridges; non-water utilities; mining and heavy industry

Funded pipeline size:
$9.8b

Unfunded pipeline size:
$9.7b



Proportion of regional work unfunded

Key funded projects:
- Bruce Highway – Gorganga Plains Upgrade, $475m
- Bruce Highway Targeted Safety Program, Gympie to Cairns (Mackay Section), $1.4b
- Clarke Creek Wind and Solar Farm (stages 1 and 2), $700m
- Capricorn Energy Pumped Hydro, $2.5b
- Lotus Creek Wind Farm, $754m
- Saraji East, $1.8b
- East Olive Downs South Extended/ Willunga, $714m
- Centurion North, $482m
- Centurion South, $536m
- Olive Downs Coal Mine, $960m
- Drake Coal, $690m
- Hail Creek Extension – Underground, $660m

Key unfunded projects:
- Mackay Port Access – Bruce Highway to Mackay – Slade Point Road
- Banana Range Wind Farm
- Arrow Bowen Pipeline
- Mahalo Gas Project
- Winchester South Mine
- Eagle Downs Coking Coal Mine
- Eaglefield Coal Mine Expansion
- Lancewood (formerly Wards Well)
- Moranbah South
- Collinsville Green Energy Hub

Average annual labour requirement:
- Funded works: 1,300 people
- Total pipeline: 2,700 people

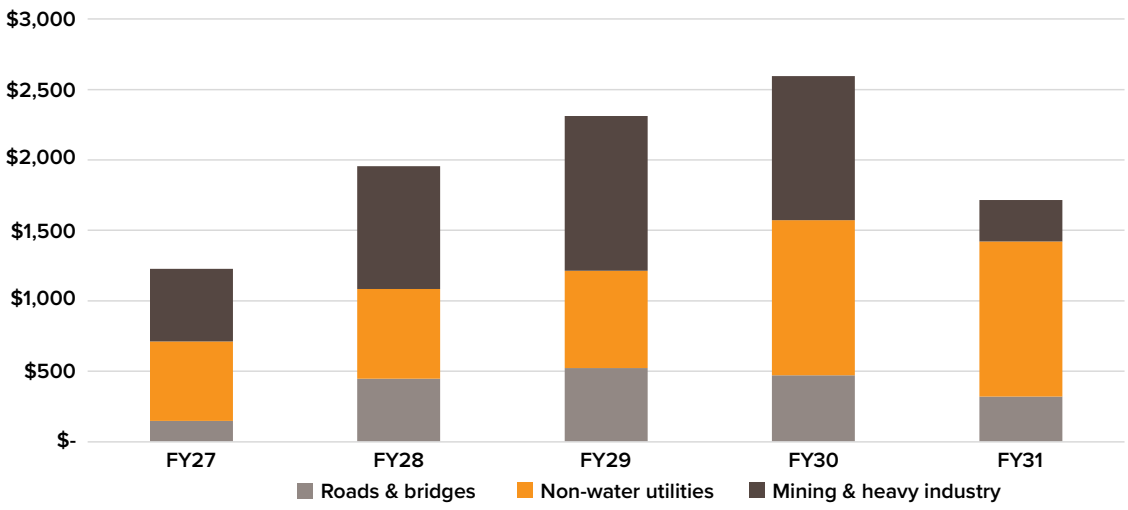
Key material requirements per year:

Material	Max annual demand	Average annual demand
Concrete	1,100,000m^3	760,000m^3
Precast concrete	21,700m^2	15,600m^2
Structural steel	154,000t	104,000t
Reinforcing steel	58,000t	41,000t
Aggregate	2.3Mt	1.9Mt

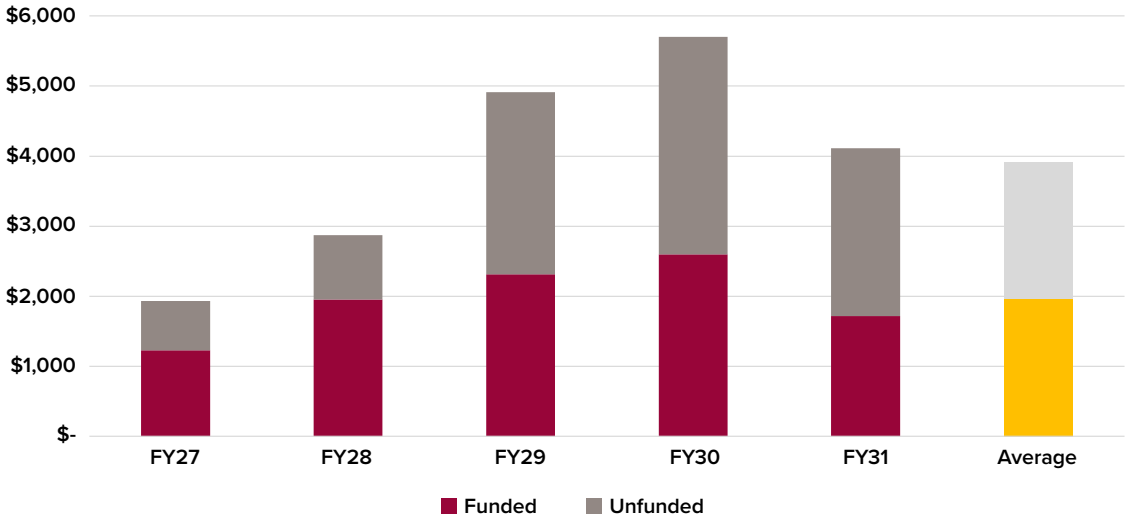
Outlook:
Mackay–Isaac–Whitsunday has the second-highest funded major project pipeline of the 11 regions at $9.8b (down slightly from $9.9b in the 2025 Report) and an unfunded percentage of its total $19.5b pipeline at 50% above the state average of 41%. Key segments across the next five years will be roads and bridges; non-water utilities; and mining and heavy industry. Mackay–Isaac–Whitsunday's major project activity will peak at $2.6b in 2029/30 and will average $2b each year across the five-year pipeline period.



Funded major project pipeline by sector ($m)



Funded v unfunded pipeline ($m)



Source: QEAS, QMCA analysis

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