
# Trade and Investment Queensland Strategy 2026–2032

TIQ TRADE + INVESTMENT QUEENSLAND

DELIVERING FOR QUEENSLAND

Queensland Government

# Minister's foreword

Queensland has entered a new chapter defined by disciplined economic focus, strong momentum and a clear commitment to ensuring all Queenslanders benefit from global opportunities.

A central part of this new direction has been re-energising Queensland's presence on the global stage. Our *Trade and Investment Queensland Strategy 2026–2032* signals a purposeful shift in the way Queensland connects with the world. It sharpens the focus on building the right relationships, pursuing quality foreign direct investment opportunities and expanding the export markets for the thousands of Queensland businesses whose products and services are sought after around the world.

Exports are critical to Queensland's economy, and the majority of our exporters are small, medium and family-owned businesses. They are the farmers, manufacturers, innovators and service providers committed to delivering something better for their customers and communities. When they succeed globally, Queensland succeeds with more new jobs, stronger regional economies and new skills and technologies flowing into our state.

Alongside trade, global investment plays a critical role in driving Queensland's economic growth. It brings capital, technology and collaboration with leading global companies that enhance productivity, build capability and support long-term prosperity.

This strategy reflects Queensland's renewed ambition. It is forward-looking and centred around the belief that trade and investment are essential to a stronger, more productive economy. We are removing barriers, providing certainty and backing businesses that want to grow. This is the *QueensLand of Opportunity*, and we are open for business.

With our industry partners, we will ensure Queensland's reputation as a world-class place to trade, invest, study and work continues to grow and deliver real benefits for the people of Queensland.

**The Hon. Ros Bates MP**
**Minister for Finance, Trade, Employment and Training**

# Contents

Rheinmetall Defence Australia, Brisbane

# Overview

## The *Trade and Investment Queensland Strategy 2026–2032* sets out how the state will compete and succeed in an increasingly contested global environment. It directs action and effort to where Queensland can secure the greatest economic and community benefit.

International trade and investment are central to Queensland's prosperity, supporting jobs, strengthening regional economies and connecting Queensland businesses to global markets, capital and expertise.

This strategy outlines how Queensland will pursue these opportunities. It reflects a deliberate focus that prioritises:

- growing the number, scale and diversity of exporters, helping more businesses become export-ready and succeed internationally
- building strong, long-term relationships in priority global markets
- activating partnerships and influence to secure outcomes, turning engagement into tangible trade and foreign direct investment results
- attracting global investment that delivers impact, supports job creation, productivity capability and regional growth.

## Why this strategy matters now

The global environment has changed since the initial version of this strategy was developed. Trade and investment are increasingly shaped by geopolitical tension, supply chain risk, skills shortages and intensified competition between jurisdictions. Markets are more contested, capital is more selective, and partners are seeking reliability, certainty and long-term alignment.

At the same time, Queensland enters this period with significant advantages:

- a strong and diversified economy
- globally competitive sectors
- deep regional capability
- a reputation for stability and trust
- growing international visibility.

In this environment, success will come from making clear choices, moving quickly and converting opportunities into economic benefits for Queensland. This strategy ensures we do exactly that.

Queensland will focus its trade and investment effort where it can deliver the greatest economic and community benefit.

By concentrating effort in these areas, Queensland strengthens its competitive position and ensures resources are used effectively.

Port of Brisbane

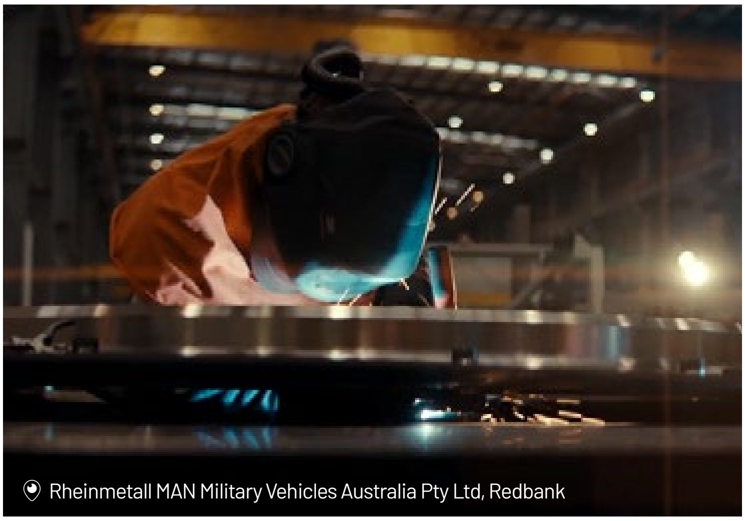
## What success looks like by 2032

By 2032, this strategy will have supported:

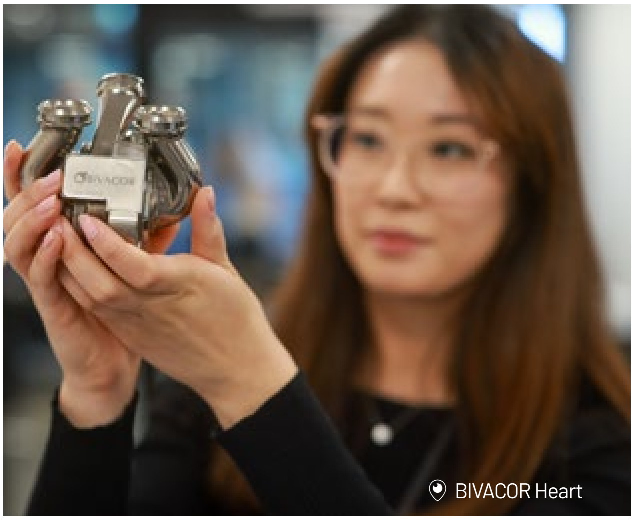
- more Queensland businesses exporting, and to more markets
- stronger global recognition of Queensland as a trusted place to trade, invest, study and work
- increased global investment aligned to Queensland's key sectors and regions, delivering jobs, productivity gains and long-term capability
- deeper, more effective partnerships that support market access, foreign direct investment attraction and commercial outcomes
- economic growth and community benefits flowing to regions across the state.

## Delivering the strategy

This is a whole-of-Queensland strategy. It will be delivered through coordinated action across government, industry and regions, led by Trade and Investment Queensland as the state's global trade and investment agency.



Rheinmetall MAN Military Vehicles Australia Pty Ltd, Redbank




BIVACOR Heart

# Trade and Investment Queensland Strategy 2026–2032

## Key Drivers

### International trade and investment drive Queensland's prosperity

Queensland is Australia's second largest goods exporter

**$123.5 billion**[1] goods and services exports in 2025

Exports represent **20%**[1] of Gross State Product

**$178 billion**[1] two-way goods trade in year ending May 2026

**$1.3 trillion**[1] worth of Foreign Direct Investment (FDI) into Australia during 2025

### The economic activity from trade and investment creates jobs for Queenslanders

**1 in 4**[2,3] Queensland jobs are supported by trade

**1 in 8**[2,3] Australian jobs by supported by FDI

Incomes are nearly **10%**[2,3] higher in export related jobs

Labour productivity is **40%**[3] higher for companies receiving FDI

### Trade and investment help build and sustain Queensland's regions and priority industries

**21** **seaports** shipping Queensland goods

**41%**[4] of Queensland exporters are based in the regions

**6** **international airports** connect Queensland to the world

**74.6%**[4] of Queensland exporters are small exporters (less than $250,000 in annual goods export value)

1 Australian Bureau of Statistics, 2025 (trade figures in nominal, balance of payment basis), Queensland Treasury 2026
2 Department of Foreign Affairs and Trade, 2024.
3 Austrade, 2024.
4 Trade and Investment Queensand, 2025.

Various Sources: Australian Bureau of Statistics (ABS), Department of Foreign Affairs and Trade (DFAT), Queensland Government Statistician's Office (QGSO), Austrade Economics. Note: FDI data is not available at a state or territory level.

## Vision

**Queensland is Australia's global trade and investment gateway — where world-class talent, businesses and dynamic industries connect with international opportunity, driving growth and prosperity across the state.**

## Strategic Pillars

### 1. More Queensland businesses export, and export more

1.1 Build and expand export capability and global reach

1.2 Preserve market share and strengthen established market positions

1.3 Drive export opportunities across Queensland's key sectors and markets

### 2. Queensland is known and trusted around the world

2.1 Build and maintain deep and trusted relationships

2.2 Elevate ***QueensLand of Opportunity*** global business brand

2.3 Leverage the 2032 Olympics to establish Queensland as a global business destination

### 3. Queensland builds strong partnerships that unlock opportunities

3.1 Champion Queensland's interests in trade and investment policy

3.2 Drive collaboration across all tiers of government to maximise trade and investment outcomes

3.3 Deepen and expand strong partnerships with key intermediaries

3.4 Provide intelligence to support clients and stakeholders to respond to global changes

### 4. Queensland attracts and secures high-value global investment

4.1 Drive new foreign direct investment and reinvestment into Queensland's key sectors

4.2 Drive foreign direct investment to deliver regional and statewide benefits

4.3 Make it easier to invest in Queensland

# Queensland's edge

**Queensland competes in a global trade and investment environment that is increasingly contested, selective and risk-aware. In this context, Queensland's edge lies in the certainty, stability and reputation of a state that is reliable, capable and ready to act — a Queensland ready for the opportunities ahead.**

# Why trade and investment matters to Queenslanders

Trade and investment are a core component of Queensland's success, accounting for over one third of Gross State Product (GSP), with exports alone driving over a quarter of the state's total economic output and one in four jobs[5,6].

This contribution is heavily felt in the regions – as Australia's most decentralised state, Queensland's regional economies rely on trade and foreign direct investment to support their growth and resilience. With 41% of Queensland's goods-exporting businesses operating in the regions, and with three quarters of all exporters being small or family-owned enterprises[7], these businesses anchor local jobs and industries and strengthen Queensland's connections to global markets.

Queensland is also Australia's second-largest goods exporter[8], firmly establishing it as a powerhouse on the world stage. One in eight Australian jobs are sustained by FDI[5,6], which brings new technologies, skills and competition that lift productivity and support higher living standards.

Together, trade and investment strengthen Queensland's competitiveness and fuels business innovation. For Queenslanders, successful trade and investment means:

- secure and well-paid jobs
- stronger regional economies
- more resilient industries
- access to new skills, technologies and ideas.

5 Department of Foreign Affairs and Trade, 2024.
6 Austrade, 2024.
7 Trade and Investment Queensland, 2025.
8 Australian Bureau of Statistics, 2025.

Brisbane Stadium (Artist's Impression)

Queensland's edge is defined by attributes the world values:

- **Global visibility:** the 2032 Olympic and Paralympic Games (2032 Olympics) puts Queensland into the international spotlight, opening new doors for trade, investment and collaboration.
- **Business confidence:** our stable, pro-growth environment gives investors and partners certainty and opportunity.
- **Lifestyle and talent:** Queensland is a magnet for people who want to study, work and build a life in a vibrant, welcoming community.
- **Future-ready skills:** our growing pipeline of skilled talent is aligned to the industries shaping tomorrow's economy.
- **Cultural strength:** the diverse cultures and communities that call Queensland home, enrich our state and expand our global outlook.

## Showcasing Queensland to the world

The 2032 Olympics provides Queensland with a rare global platform that extends well beyond sport. With the 2032 Olympics set to deliver a $4.6 billion trade and tourism uplift and generate over $8 billion in economic benefits by 2042[9], Queensland has the momentum to deepen relationships and attract FDI and talent. The *QueensLand of Opportunity* global business brand amplifies this message. It signals to global markets that Queensland is open to trade, investment, study and talent. The 2032 Olympics provide the impetus that will focus Queensland in its positioning as a confident, opportunity-rich economy ready to build enduring partnerships.

## Delivering value through global partnerships

Queensland creates value for global partners by aligning opportunity with capability. Partners choose Queensland because it:

- reduces risk through certainty and consistency
- accelerates delivery through coordination and clarity
- converts relationships into commercial and foreign direct investment outcomes.

## Aligning global engagement with Queensland's priorities

Queensland's trade and investment effort supports the delivery of key Queensland Government priorities by attracting global capital, opening markets and building capacity aligned to broader economic, industry and regional strengths.

These priorities have been identified in a suite of Queensland Government strategies, with trade and investment acting as an enabler, connecting long-term opportunities and delivering practical outcomes for the state.

Globally focused and locally led, Trade and Investment Queensland (TIQ) has an expanded and growing presence across international markets, supported by on-the-ground capability across eight Queensland regions. Through this work, TIQ helps Queensland deliver over a quarter of Australia's resource exports and supports 41% of the state's exporters based in regional areas[10].

9 KPMG, 2021.
10 Trade and Investment Queensland, 2025.

## Trade and Investment Regional Offices

Brisbane

Cairns

Townsville

Mackay

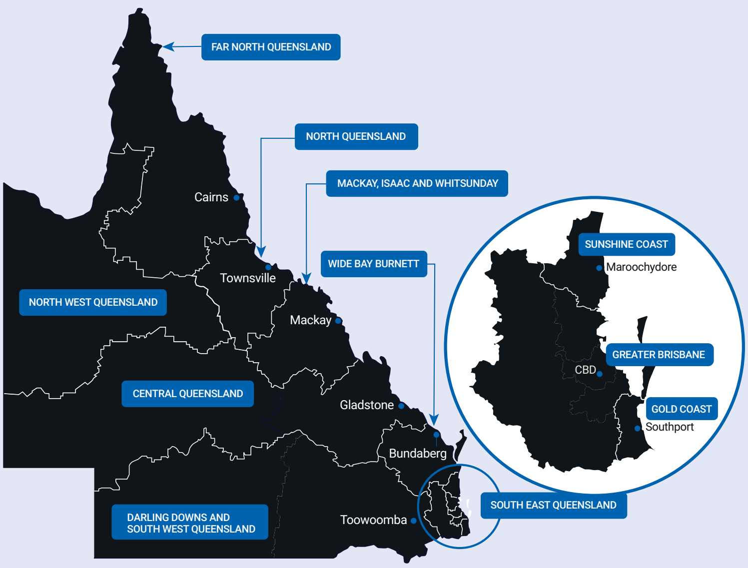
Gladstone

Bundaberg

Maroochydore

Toowoomba

Ipswich



# Strategic approach

**The *Trade and Investment Queensland Strategy 2026–2032* is delivered through four strategic pillars. Together, they set out how Queensland will build trust, attract global investment, expand exports and secure outcomes in a contested global environment.**

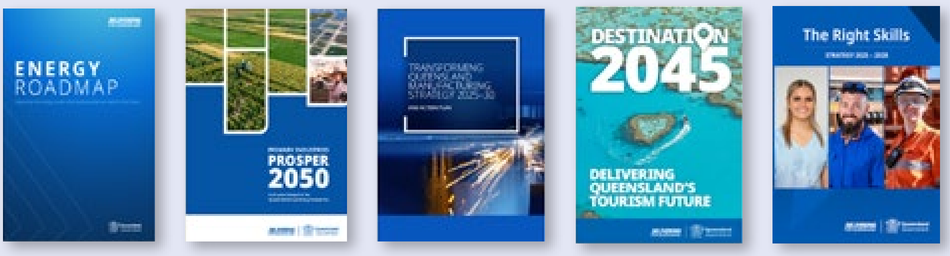
This section explains the strategic approach that underpins the pillars. It summarises how Queensland will focus effort, align capability and convert global engagement into results.

## A whole-of-Queensland approach to trade and investment

This strategy supports and reinforces the delivery of Queensland Government priorities by:

- attracting FDI aligned to industry development and economic growth
- opening and sustaining access to key sectors and markets
- supporting productivity, skills and capability uplift
- strengthening economic resilience across the state.

The ***Trade and Investment Queensland Strategy 2026–2032*** will be delivered through a 'Team Queensland' approach, working in alignment with Queensland Government strategies and frameworks.


Sovereign Industry Development Fund Priorities: Defence, Biomedical and Biofuels

## Activating the QueensLand of Opportunity global business brand

Global engagement, including trade missions, will be approached as deliberate opportunities to secure FDI, market access and capability outcomes for our state.

Queensland will continue to promote its strengths globally as a core part of its trade and investment effort. Strong visibility, reputation and brand recognition remain essential to competing in global markets.

This strategy strengthens the connection between promotion and outcomes, ensuring global engagement is targeted, purposeful and aligned to key sectors, regions and markets.

The *QueensLand of Opportunity* global business brand, introduced in 2025, provides the platform for this approach. It presents Queensland with a clear, consistent and confident voice internationally. Promotion will be delivered through:

- focused market activity aligned to strategic priorities
- targeted global events, missions and campaigns
- consistent messaging that reinforces Queensland's strengths and reliability.

## Focusing effort where it delivers impact

Queensland will focus its trade and investment effort where it can deliver significant economic and community benefit. This strategy prioritises:

- **sectors** where Queensland has strong capability and clear global demand
- **regions** with the scale, skills and infrastructure to support growth
- **markets** where relationships, trust and alignment are strongest.

By concentrating effort in these areas, Queensland can strengthen its competitive position and ensure resources are used effectively. This focus allows Queensland to pursue opportunity with intent.

## Activating opportunity across sectors, regions and markets

Queensland delivers the strongest outcomes when sectors, regions and markets are aligned. This strategy brings these elements together to ensure opportunities are identified early, shaped collaboratively and progressed with purpose. Better coordination will improve duplication and strengthen Queensland's efforts across the four strategic pillars.

## Opportunity in a changing world

Global shifts are reshaping trade and investment, creating challenges and opportunities for Queensland. Australia's competitive trading environment and extensive network of Free Trade Agreements (FTAs) gives Queensland exporters a clear advantage, particularly as global markets seek reliability and certainty. Queensland provides investors with stable conditions, trusted access and the confidence to grow in an increasingly contested environment.

| Global Change | The Queensland Opportunity |
|---|---|
| Trade-restrictive policies are driving up costs and uncertainty in global commerce.<br>By 2024, these policies were five times higher than the 2010-19 average[11]. Rising tariffs and supply chain bottlenecks are expected to slow global merchandise trade growth to just 0.5% by 2026, down from 2.4% in 2025[12]. | Queensland is well positioned as an attractive and stable market amid ongoing global uncertainty.<br>Shifting trade barriers are creating new opportunities for Queensland to diversify its trade relationships. Higher trade restrictions on competitor countries opens space for Queensland to capture additional market share. |
| The global environment is increasingly contested, raising risks for cross-border business.<br>Nation-based conflicts have also reached their highest level since 1946, driving instability and uncertainty[13]. The breakdown of traditional multilateral frameworks is accelerating a shift toward bilateral partnerships, while supply chain disruptions and regulatory challenges are driving up costs and complicating operations. | Queensland offers partners stability, reliability, and multi-regional reach in a fragmented global landscape.<br>Queensland is strengthening relationships with established partners such as Europe, Japan, and Korea, while deepening engagement with high-opportunity markets such as India. Backed by Australia's FTAs and TIQ's global footprint currently spanning 27 locations in 18 markets, Queensland provides certainty, resilience, and trusted access for trade and investment[14]. |

11 World Bank Group, 2025.
12 World Trade Organisation, 2025.
13 Rystad, 2025.
14 Department of Foreign Affairs and Trade, 2024.

Cattle farmer, Darling Downs

| Global Change | The Queensland Opportunity |
|---|---|
| Economic and national security are increasingly intertwined, reshaping global markets and supply chains.<br>Global defence spending reached a record $2.9 trillion in 2025[15]. Strategic trade barriers and export controls – such as China's rare earth restrictions and US technology bans – are driving a shift toward advanced manufacturing, critical minerals, and supply chain security[16,17]. | Queensland offers partners secure, resilient supply chains in a shifting global landscape.<br>Enhanced connectivity via the *Connecting Queensland Fund* is opening new air routes and improving market access. Strategic initiatives like the *Transforming Queensland Manufacturing Strategy 2025-30* are driving innovation, expanding export pathways, and attracting global investment in advanced manufacturing and defence. |
| Resource security is shaping global priorities and driving new investment strategies.<br>The transition to sustainable energy is now projected to extend to 2060, with coal and LNG remaining essential for reliable and affordable energy worldwide[18]. Critical minerals, food, and water security are increasingly central to economic stability, as nations invest in sustainable production and robust supply chains to safeguard these vital resources[19]. | Queensland is unlocking investment and export growth across energy, resources, and agriculture.<br>As a leader in coal, LNG, and critical minerals, Queensland is home to many of the world's most sought-after strategic materials and natural resources — including world-class vanadium deposits for advanced manufacturing and energy storage[21]. Guided by the *Primary Industries Prosper 2050* strategy, Queensland's globally recognised agricultural sector is targeting $30 billion in value by 2030, creating significant opportunities for trade partnerships, innovation, and value-added processing[21]. |
| Human and technological potential are reshaping productivity worldwide.<br>Global talent shortages, driven by ageing populations, technology adoption, and migration lows, are creating critical skills gaps that challenge growth. By 2030, 59% of workers will require reskilling or upskilling, while advances in artificial intelligence (AI) and quantum computing are unlocking new levels of productivity and value[20]. | Queensland is a recognised leader in quantum and advanced technology research.<br>With over 30 years at the global frontier in robotics, AI, nanotechnology, and quantum technologies, Queensland is recognised as a leader in advanced research. The 2032 Olympics provide a global platform to attract international students and skilled migrants to these areas, helping to grow the future-ready workforce and strengthen Queensland's position as a destination for talent and education. |

15 Stockholm International Peace Research Institute.
16 Center for Strategic and International Studies, 2025.
17 Reuters, 2025.
18 Wood Mackenzie, 2025.
19 International Energy Forum.
20 World Economic Forum.
21 Trade and Investment Queensland, 2025.


Genics, Brisbane


New Acland Mine, Oakey

# Pillars for success

The *Trade and Investment Queensland Strategy 2026–2032* is built around four strategic pillars that move Queensland from global ambition to action and outcomes. These pillars set out the choices Queensland is making to compete confidently in global markets by promoting existing strengths, growing key sectors and diversifying for long-term success.





A. Cane farm, Mackay.
B. International university student, Brisbane.
C. Brisbane CBD.
D. Purlingbrook Falls, Springbrook National Park.

# More Queensland businesses export, and export more

## Why this matters

Queensland's prosperity depends on businesses' ability to compete and win in global markets. By helping more Queensland companies to export and by supporting existing exporters to grow, we create new jobs, drive innovation and build resilience across Queensland. This pillar is about unlocking new markets and strengthening our position in existing markets we lead, ensuring Queensland businesses thrive on the world stage.

## What Queensland will do

Queensland will support more businesses to become export ready and help existing exporters to sustain performance and enable diversification where opportunities exist. Support will be targeted to market opportunities and aligned to the needs of businesses at different stages in their export journey.

| Objectives | Directions | Goal | Measure |
|---|---|---|---|
| **Build and expand export capability and global reach** | Support new exporters to enter global markets, and existing exporters to expand into new markets, by equipping Queensland businesses with the skills, networks, and market intelligence needed to succeed internationally. This will support new exporters to enter global markets and enable established exporters to deepen their presence and diversify globally to capture greater value. | Queensland businesses have the skills, knowledge, and support to compete and succeed in international markets. | The percentage of businesses who record export outcomes. |
| **Preserve market share and strengthen established market positions** | Support Queensland exporters to overcome barriers, protect their market share, and respond to global changes. By providing expert guidance and tailored support, we will assist exporters in maintaining strong relationships and sustain their position in key markets. | Queensland exporters maintain and grow their presence in key global markets. | Level of sustained growth in export value to priority international markets. |
| **Drive export opportunities across Queensland's key sectors and markets** | Focusing efforts across Queensland key sectors and markets where the state can achieve the greatest value and benefit. By leveraging data-driven insights and our global network, we will unlock new opportunities for growth while reinforcing our strengths in established export areas. | Queensland captures new export opportunities in key sectors and emerging markets. | Value of export growth across key sectors and markets. |

# Queensland is known and trusted around the world

## Why this matters

Queensland's global reputation is our gateway to developing and expanding the deep and trusted relationships that drive trade and investment outcomes. When the world knows and trusts Queensland, we attract the connections, talent and wealth to drive our state forward.

For Queensland, maintaining and protecting existing market strength and long-standing relationships is as important as building new ones. This pillar is about making Queensland the first choice for global business, delivering benefits for every Queenslander, across every region.

## What Queensland will do

Queensland will take a deliberate approach to reputation-building by deepening engagement in priority markets and treat existing and new relationships with consistency and respect.

Promotion will focus on reinforcing trust, credibility and delivery, rather than broad visibility alone.

| Objectives | Description | Goal | Measure |
|---|---|---|---|
| **Build and maintain deep and trusted relationships** | Deepen trust and engagement with new and existing global networks, opening more doors for Queensland businesses and talent. Through trade missions and global events, connect Queensland with key international stakeholders and decision-makers and invest to renew, refresh and maintain relationships fundamental to Queensland. This will secure new and maintain existing trade and investment opportunities. | Queensland is recognised globally as a trusted, leading network for trade, investment, and talent. | Satisfaction of stakeholders who underpin Queensland's trade and investment relationships. |
| **Elevate *QueensLand of Opportunity* global business brand** | Leverage the *QueensLand of Opportunity* global business brand to promote Queensland as a premier destination for trade, investment, study and work. Utilise bold messaging and a strong presence at global trade and investment events to attract new international interest and demand for Queensland products, services, and skills, while reinforcing our reputation and value with established markets and networks. | Queensland is top-of-mind for global investors, exporters, students, and skilled professionals. | Year-on-year improvement in global brand recognition and perception, as measured by international media mentions, investor/stakeholder surveys, and digital engagement analytics. |
| **Leverage the 2032 Olympics to establish Queensland as a global business destination** | Position Queensland as Australia's most recognised hub for global business. Leverage the light of the 2032 Olympics to demonstrate the capability and innovation across Queensland's regions to support the $4.6 billion trade and tourism uplift and realise a legacy of long-term economic prosperity. | Queensland leverages the 2032 Olympics to secure new international relationships and investment. | Number and value of new trade, investment, and talent attraction agreements delivering legacy outcomes directly linked to the 2032 Olympics related promotion and engagement activities. |

# Queensland builds strategic partnerships that unlock opportunities

## Why this matters

Queensland's trade and investment success depends on strong partnerships across all tiers of government, industry and global networks. By working together, we amplify our impact, secure better outcomes for exporters and investors, and ensure Queensland's priorities are front and centre in policy, government, and intermediary decision making. This pillar is about forging new alliances, strengthening existing partnerships, and driving results that benefit every Queenslander.

## What Queensland will do

Queensland will focus on partnerships that deliver outcomes, prioritising relationships that improve market access, attract global investment and support exporter growth.

Partnerships will also be used to help Queensland businesses scale export capability and connect them to intermediaries and global value chains.

| Objectives | Directions | Goal | Measure |
|---|---|---|---|
| **Champion Queensland's interests in trade and investment policy** | Advocate for Queensland's priorities in trade and investment policy – and engage across all Australian jurisdictions to influence federal decision-makers as they shape free trade agreements and wider policy impacting trade, investment, skills and talent. This will secure market access, strengthen supply chains, and deliver real benefits for Queensland businesses and communities. | Queensland's priorities shape national trade and investment policy and FTAs. | Consistency and quality of input into relevant national policies and FTAs submissions and engagement at cross-jurisdictional forums. |
| **Drive collaboration across all tiers of government to maximise trade and investment outcomes** | Connect opportunities across all tiers of government to streamline and secure trade and investment outcomes, establish a clear front door for stakeholders, reduce barriers and grow the state's international connectivity. Work with agencies, departments and councils to deliver clients a unified, multilayered approach to work, study, trade and live in Queensland. | Queensland businesses and investors benefit from integrated, end-to-end support across the trade and investment ecosystem. | Percentage of participating businesses and investors reporting improved access to coordinated support and services. |
| **Deepen and expand strong partnerships with key intermediaries** | Build and maintain strong partnerships with chambers of commerce, industry associations and other partners to open new growth pathways. This will expand opportunities for exporters and investors, spark innovation, support supply chain resilience, accelerate international success, and ensure Queensland businesses are equipped to lead on the global stage. | Stronger partnerships with key intermediaries including chambers of commerce and industry associations. | Results of stakeholder satisfaction surveys with key partners. |
| **Provide intelligence to support clients and stakeholders to respond to global changes** | Provide the intelligence and services to equip Queensland businesses and government stakeholders with the insights to respond to global challenges, build supply chain resilience, and embrace trade and investment opportunities in our changing world. | Queensland businesses and stakeholders have access to the intelligence and insights to respond to the changing global environment. | Increased stakeholder engagement with and provisions of wider range of intelligence and services. |

# Queensland attracts and secures high-value global investment

## Why this matters

FDI fuels Queensland's growth, jobs and innovation. By attracting new capital and reinvestment, we drive opportunity across all of Queensland's sectors and regions. This pillar is about making Queensland the destination of choice for global investors, unlocking new industries, strengthening our position in existing sectors we lead, and ensuring every Queenslander benefits from a stronger economy.

## What Queensland will do

Queensland will prioritise FDI aligned to key sectors and priority markets, focusing on projects and opportunities that strengthen economic resilience and deliver lasting benefits.

Effort will be directed toward attracting, securing and retaining global investors who are committed to Queensland for the long term.

| Objectives | Directions | Goal | Measure |
|---|---|---|---|
| **Drive new FDI and reinvestment into Queensland's key sectors** | Highlight Queensland's strengths to global investors and target high-impact opportunities, connecting capital with existing industries and those shaping our future, maintaining success and driving growth. This will create new jobs, accelerate innovation and provide investors with the assurance to reinvest. | Queensland attracts increased investment across key sectors to drive growth and innovation. | Increasing value and number of FDI outcomes secured in Queensland's key sectors. |
| **Drive FDI to deliver regional and statewide benefits** | Work proactively to deliver outcomes for all of Queensland by showcasing regional strengths and opportunities. By attracting new investment and supporting existing investors, we will deliver lasting economic benefits, resilience and jobs for communities across the state. | Foreign direct investment outcomes are realised across all of Queensland and its regions. | Increasing value and number of FDI outcomes secured across regions. |
| **Make it easier to invest in Queensland** | Strive to set a new standard for investor experience creating investor front-doors, streamlining approvals, cutting red tape, and providing clear, proactive support. This will attract new capital and ensure our current investors can grow and reinvest with confidence. | Queensland is recognised as open for business, offering a seamless investment experience. | Investor satisfaction score (for example Net Promoter Score or equivalent post-investment survey). |


University of Queensland

# Sector focus

Queensland's prosperity lies in the diversity of its industries. This strategy focuses effort where Queensland has the strongest capability, there is the clearest global demand and greatest opportunity to deliver long-term growth and benefits for the state.

Key sectors are those where Queensland can compete confidently, attract high-quality investment and support exporters to succeed at scale.

## Why sector focus matters

By prioritising sectors, Queensland:

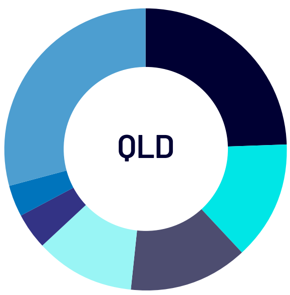
- signals clarity and confidence to global partners
- aligns promotion, partnerships and FDI attraction
- supports exporters with relevant market intelligence and connections
- builds scale and capability over time.

This focus allows Queensland to move from opportunity identification to delivery with greater speed and impact.

## Keeping sector focus responsive

Global markets, technologies and demand will continue to evolve. Detailed sector and market priorities will be progressed through annual delivery plans and supporting sector and market-based strategies aligned to this overarching framework. This approach ensures Queensland remains agile while maintaining strategic clarity and discipline.

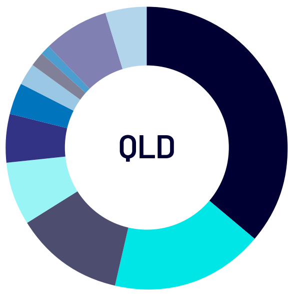
### Exports - Markets




- China **24.6%**
- Korea **13.7%**
- Japan **13.5%**
- India **11.5%**
- USA **4.2%**
- Taiwan **3.6%**
- Other **29.0%**

Source: Queensland Treasury FY2024-25.
Note: data captures goods only.

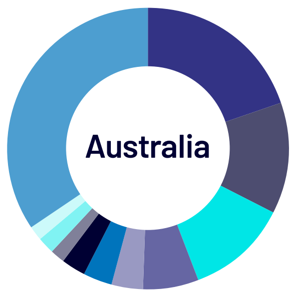
### Exports - Commodities




- Coal Resources **36.2%**
- LNG **17.6%**
- Metals/Minerals **12.5%**
- Beef **7.3%**
- International Education **5.4%**
- Tourism **3.6%**
- Crops **2.5%**
- Raw Sugar **1.6%**
- Cotton **1.3%**
- Other Goods **7.4%**
- Other Services **4.6%**

Source: Queensland Treasury & ABS 2024.

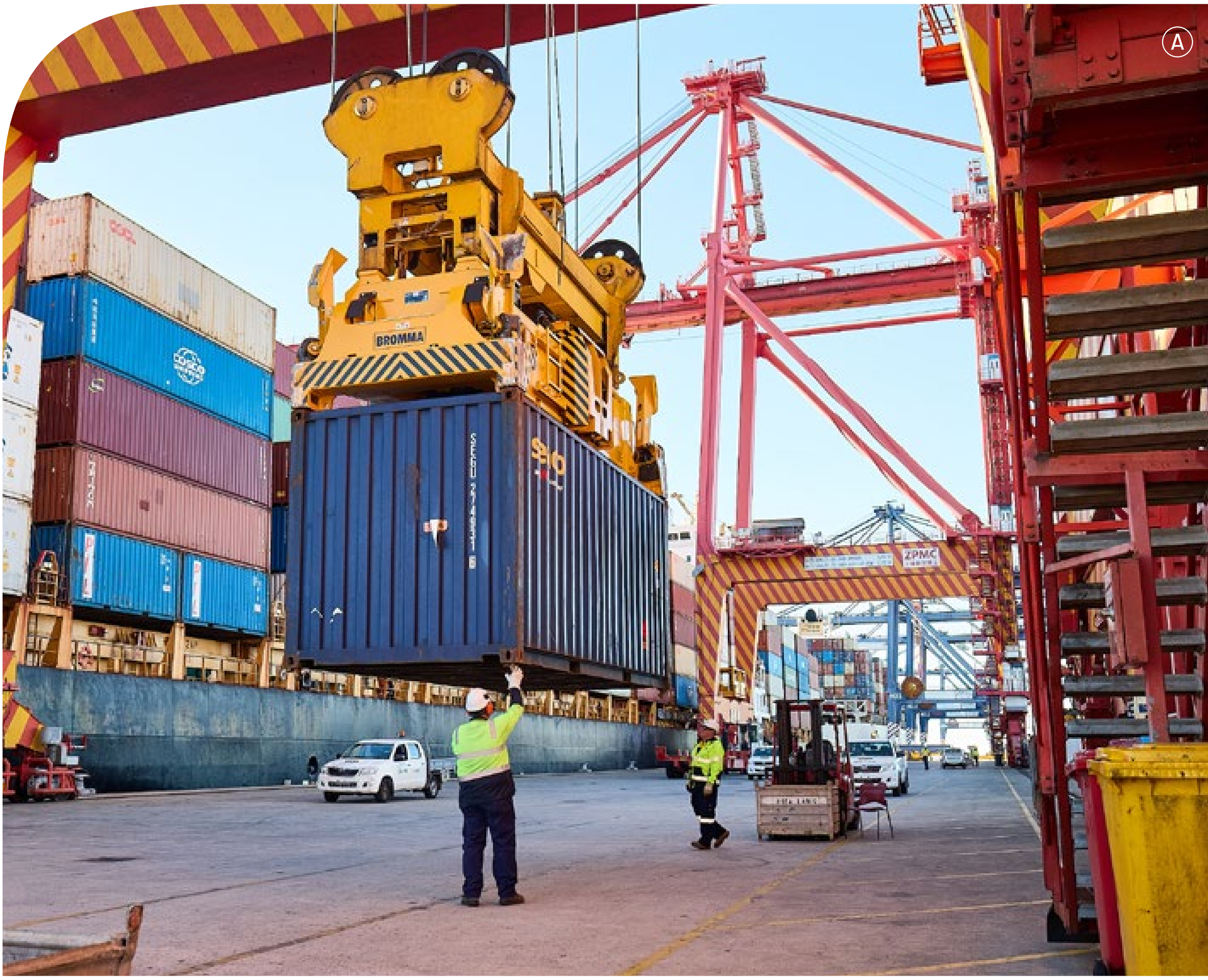
### Australian FDI - Markets




- USA **19.8%**
- Japan **12.7**%
- UK **11.8%**
- Canada **6.4%**
- Singapore **3.6%**
- Netherlands **3.2%**
- China **2.8%**
- France **1.9%**
- Germany **1.9%**
- Hong Kong **1.7%**
- Other **34.2%**

Source: ABS 2025.

A. Port of Brisbane.
B. Wheat farm, Queensland.
C. International students.





## Energy and biofuels

With its abundant gas reserves, emerging biofuels sector and rapidly expanding renewable energy portfolio, Queensland is positioned to support the world's growing demand for energy. Data centres, AI, industrial consumption and electrification powered a 3% increase in demand in 2025 (almost double the 2013-23 average)[22], as economies balance energy security with the energy transition.

### Queensland's opportunity

Queensland is well placed to meet global demand for reliable, affordable and sustainable energy. Backed by strong policy certainty, the *Queensland Energy Roadmap 2025* and targeted investment initiatives, the state is emerging as a global energy hub. Queensland is also expanding its biofuels industry, supported by its primary industries base and the $180.6 million Sovereign Industry Development Fund.

## Resources and critical minerals

As the state's largest export (worth $41.6 billion during FY24-25), Queensland coal is positioned to meet stronger and longer demand in both metallurgical coal, used in steel-making, and thermal coal needed to generate electricity[23]. Meanwhile, supply of critical minerals, which are essential inputs into sovereign industries including advanced manufacturing, defence, aerospace and renewable energy, will likely increase over the coming years to meet international emissions reduction targets[22].

### Queensland's opportunity

Queensland has some of the world's biggest coal reserves, with its high-quality metallurgical coal supporting ongoing industrialisation of the global economy. It is home to many of the world's most sought-after critical minerals and natural resources, backed by mining, Mining Equipment, Technology and Services (METS), refining and processing capabilities that position the state as a trusted partner for secure resources.

## Defence and aerospace

The invasion of Ukraine, increased US unilateralism and rising tariff barriers have recalibrated global defence priorities, prompting boosts in defence spending. NATO allies have committed, by 2035, to investing 5% of GDP on core defence requirements and defence and security-related spending, driving demand for advanced solutions and targeted initiatives[24]. Queensland's defence sector already contributes $1.2 billion to the national economy each year, positioning the state to benefit from this global shift.

### Queensland's opportunity

Queensland's defence sector is growing fast, supported in part by the $180.6 million Sovereign Industry Development Fund, and strengthened local supply chains. Our Asia-Pacific location, strong partnerships and skilled workforce give us an edge in defence manufacturing, aerospace, maritime sustainment and space, while our national leadership in heavy vehicle manufacturing and MRO (maintenance, repair, and overhaul) supports advances in autonomous systems and aerospace engineering.

22 International Energy Agency, 2025.
23 Wood Mackenzie, 2025.
24 NATO, 2025.

## Manufacturing

From precision-engineered medical devices and advanced robotics to world-class food processing and heavy industry, Queensland's manufacturing sector is powering innovation. The state's *Transforming Manufacturing Strategy 2025-30* positions Queensland as a dynamic destination for industry investment and export potential, with a clear vision to drive innovation, expand export markets, and attract capital across the sector.

### Queensland's opportunity

Backed by targeted grants, expanded manufacturing hubs and a strong focus on resilient supply chains and skills, Queensland offers investors and exporters a future-ready, globally competitive platform. With direct access to Asia-Pacific markets and a government committed to industry growth, Queensland manufacturing is primed for global success.

## Primary Industries

Queensland's primary industries are a diverse, economic powerhouse, employing almost 385,900 people though the supply chain and directly supporting over 68,500 businesses[25]. As global demand for sustainable, ethically produced food, fibre and bio-products accelerates, and technological, environmental and geopolitical pressures reshape markets, Queensland's scale, diversity and innovative capacity position it strongly to meet shifting global needs with resilience and competitiveness.

### Queensland's opportunity

Queensland's primary industries are globally recognised for safe, high-quality and sustainable food, backed by strong traceability and biosecurity. With the *Primary Industries Prosper 2050* strategy driving innovation, proximity to Asia, more than 80% of land suitable for production[25], diverse growing conditions and world-class logistics, Queensland is well positioned to meet rising global food and protein demand.

## Tourism

With spectacular natural scenery, diverse regions and world-famous visitor experiences, Queensland attracts over 2.4 million international visitors each year[26], making tourism our second largest service export[27]. With demand for international air travel projected to increase by 4.9% in 2026[28], the state is positioned for growth on the runway to the once-in-a-generation opportunity presented by the 2032 Olympics. Queensland welcomed 2.4 million international visitors in the year ending December 2025[29].

### Queensland's opportunity

*Destination 2045* positions Queensland as a global leader in tourism. Queensland is creating opportunities for investment through initiatives such as the *Connecting Queensland Fund*, streamlined approval processes for tourism infrastructure, and a global investment prospectus. These efforts are designed to attract international capital and ensure Queensland remains a top destination for both tourists and tourism investors.

25 Department of Primary Industries.
26 Tourism Research Australia.
27 Trade and Investment Queensland, 2025.
28 International Air Transport Association, 2025.
29 International Visitor Survey, Tourism Research Australia.

## Infrastructure

Queensland is accelerating a record infrastructure pipeline to support growth, livability, and a positive legacy of the 2032 Olympics. Major opportunities exist for investors across water security projects, large-scale housing development — including the government's plan to deliver one million new homes by 2044[30] — and transformative Games-related infrastructure such as world-class stadiums, transport upgrades, and community facilities.

### Queensland's opportunity

Strengthened by streamlined approvals and a strong commitment to both regional and urban renewal, Queensland's infrastructure sector offers long-term, partnership-driven opportunities for global investors. These projects are designed to deliver lasting economic and social benefits, positioning Queensland as a leader in sustainable, future-ready infrastructure.

## Health, Life Sciences and Biomedicine

Queensland is internationally recognised for its strengths in biomedical and biotechnology research, clinical trials, and health innovation. The Sovereign Industry Development Fund is a key initiative to build sovereign biomedical capability, attract private investment, and secure long-term economic growth.

### Queensland's opportunity

With world-class research institutions, advanced health precincts and a highly skilled workforce, Queensland offers global partners a trusted environment for health and life sciences collaboration and commercialisation. These strengths position Queensland as a preferred destination for international investment and partnerships in cutting-edge medical research and innovation.

## Digital and Critical Technology

The rapid expansion and volume of growth across technology is quickly shaping global momentum and forging innovation across every industry. Digital and critical technology underpins the productivity and innovation of many key industries. Queensland's collaborative leadership style in research and development for quantum science, AI, robotics, nanotechnology, game development and virtual reality showcases the states appetite to drive and foundations to deliver innovative and commercialised outcomes across emerging and traditional industries.

### Queensland's opportunity

Queensland's state-of-the-art infrastructure, strong industry collaboration and skilled talent positions the state as a trusted hub for investment, talent and global supply chain opportunities. Queensland offers international partners access to world-class expertise and a dynamic ecosystem for developing and scaling next-generation technologies.

30 Department of Housing and Public Works.

## International Education and Training

As the globe becomes more competitive and restrictive, demand for International Education and Training (IET) is shifting from prestige reputation toward pathways that deliver real career outcomes. The IET sector is Queensland's largest services export contributing $6.8 billion directly into the Queensland economy[31] while strengthening the state's cultural vitality and future workforce through global skills and talent attraction.

### Queensland's opportunity

Through Queensland's ecosystem of quality, practical based providers, the state delivers world-class education and career pathways that build global skills and produce workforce-ready graduates. Supported by strong industry links, and a high standard of living, the sector offers students and partners high-quality learning, valuable connections, and clear pathways to global success.

## Professional Services

Queensland's professional services sector helps organisations navigate complexity and move forward with confidence. Queensland has a growing professional services sector across legal, engineering, accounting, consulting and creative industries. As a stable and forward-thinking partner, the state is recognised for its expertise, quality and ability to deliver tailored solutions across diverse sectors and markets.

### Queensland's opportunity

Queensland professionals becoming increasingly in demand for their ability to support international business expansion, deliver cross-border projects, and provide tailored innovative solutions to global clients. These strengths enable Queensland's professional services sector to capture new opportunities, forge international partnerships, and contribute to business growth worldwide.

## Sports and Experiences

In a world that seeks connection, shared sports, arts and experiences unite people, strengthen communities and support economic growth. Queensland's embracing culture, creative industries, world-class venues, vibrant events, and high-performance ecosystems – combined with its strong record of hosting international events and deep community engagement – highlight the state's passion for sport, creativity, entertainment and fun as we prepare for the 2032 Olympics.

### Queensland's opportunity

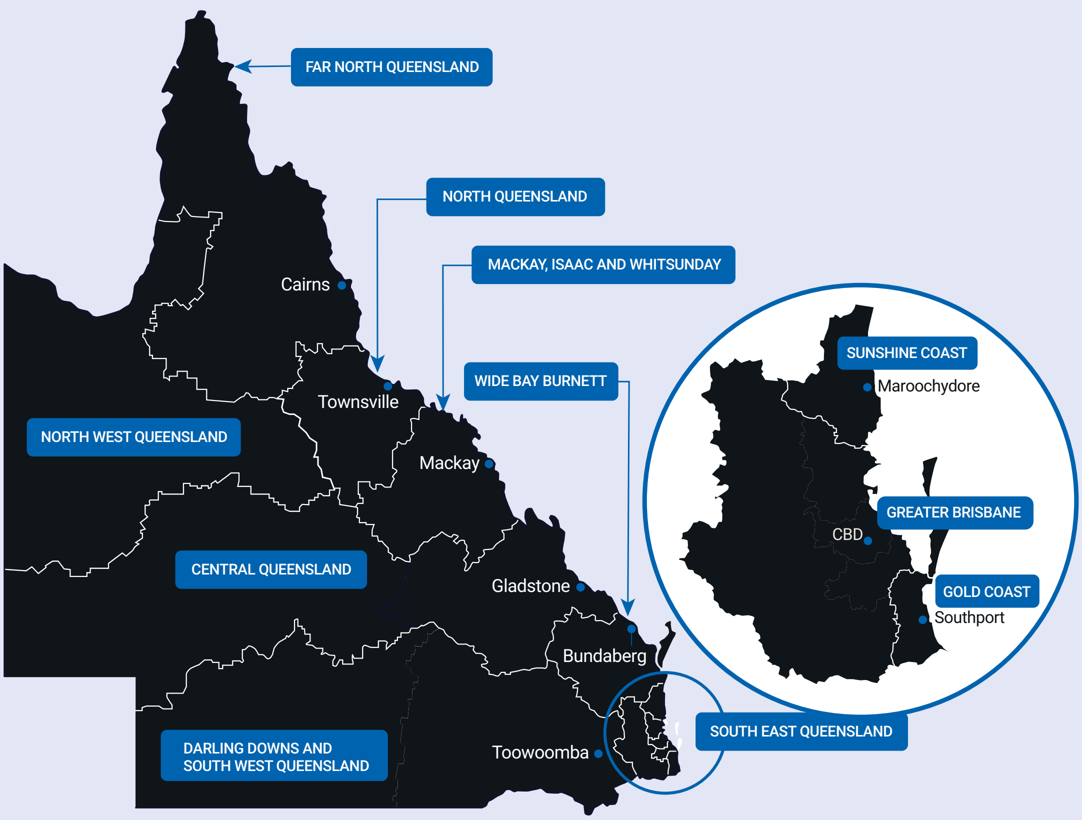
With the global spotlight of the 2032 Olympics, Queensland is uniquely positioned to expand international partnerships in sports media and content production, attract investment for new and upgraded venues, and grow sports tourism. These strengths enable Queensland to export sports expertise, host additional world-class events, and create new avenues for global engagement and economic growth.

31 Queensland Government Statisticians Office.


Kalfresh, Kalbar
OVERSIZE

# Delivering growth across Queensland's regions

Queensland's regions are key to the state's trade and investment success. They are where many of Queensland's globally competitive industries are based, where export value is generated and where the majority of global investment opportunities are delivered.



## Regional powerhouse

Spanning vibrant cities and towns, remote communities and high-quality natural assets, Queensland's regions deliver distinct strengths spanning resources, manufacturing, agriculture, energy and tourism. With 41% of exporters based in the regions, and 77.5% being small or family businesses[32,33], regional Queensland powers growth, innovation, and global competitiveness – ensuring every community shares in the state's future[33,34].

This strategy is focused on ensuring trade and investment deliver tangible benefits across Queensland. It recognises that regional outcomes are a critical measure of Queensland's success. By aligning global engagement with regional capability, Queensland will:

- drive foreign direct investment beyond metropolitan centres
- strengthen regional supply chains
- build skilled workforces
- support sustainable, long-term growth.

## Aligning regional strengths with global opportunity

Global opportunities do not automatically translate into regional outcomes. They require coordination, readiness and clear pathways to market. This strategy focuses on:

- identifying region-specific opportunities early
- preparing regionally-based businesses and exporters to respond to global interest
- supporting projects that deliver long-term regional benefit.

32 Austrade, 2024.
33 Trade and Investment Queensland, 2025.
34 TIQ, 2025. *QueensLand of Opportunity*.

# Greater Brisbane

### Regional advantages

- Rapid population and infrastructure growth
- High-tech manufacturing and innovation hub
- Centre for international education and medical research

### Established industries:

- Health and Life Sciences
- Infrastructure
- International Education and Training
- Manufacturing
- Primary Industries
- Tourism
- Sports and Experiences

### Growth areas:

- Defence
- Digital and Critical Technologies

## Gold Coast

### Regional advantages

- Thriving tech start-up and innovation culture
- Home of Australia's screen industry
- Health and knowledge precinct

### Established industries:

- Health and Life Sciences
- International Education and Training
- Manufacturing
- Professional Services
- Tourism

### Growth areas:

- Defence and Aerospace
- Digital and Critical Technologies
- Health and Life Sciences
- Sports and Experiences

## Sunshine Coast

### Regional advantages

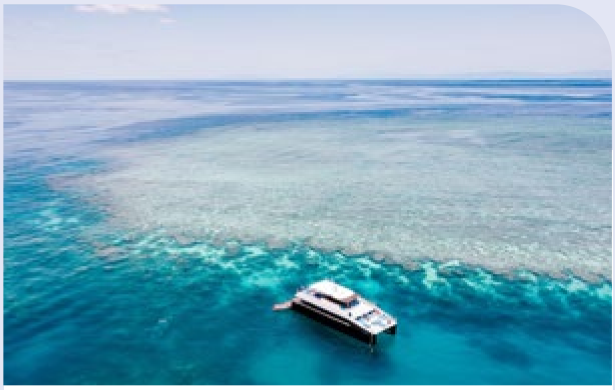
- Fast growing population
- Australia's fastest east coast data connection to Asia and US
- Global centre for cyber security

### Established industries:

- Digital and Critical Technology
- International Education and Training
- Manufacturing
- Primary Industries
- Tourism

### Growth areas:

- Defence and Aerospace
- Digital and Critical Technologies
- Health and Life Sciences
- Sports and Experiences



# Far North Queensland

## Regional advantages

- Strategic gateway for international air and sea freight
- Leading centre for marine and aviation industries
- Strong education and skills ecosystem
- Inclusive opportunities with significant Aboriginal and Torres Strait Islander peoples

## Established industries:

- International Education and Training
- Manufacturing
- Primary Industries
- Tourism
- Resources and Critical Minerals

## Growth areas:

- Defence and Aerospace
- Energy
- Health and Life Sciences

# North Queensland

## Regional advantages

- Key export hub to Asia-Pacific via Townsville port
- Major contributor to Queensland's food exports
- Centre for tropical health and marine science research
- Infrastructure for energy storage and transmission

## Established industries:

- Defence and Aerospace
- Infrastructure
- International Education and Training
- Resources and Critical Minerals
- Primary Industries

## Growth areas:

- Energy and biofuels
- Infrastructure
- Sports and Experiences

## North West Queensland

### Regional advantages

- Home of the North West Minerals Province's abundant mineral wealth
- Resilient economy with strong agricultural base (beef, fishing)
- Strategic positioning and access to transport corridors

### Established industries:

- Resources and Critical Minerals
- Primary Industries
- Energy

### Growth areas:

- Defence and aerospace
- Manufacturing
- Tourism

## Central Queensland

### Regional advantages

- Energy and resources hub
- Advanced manufacturing in metals and chemicals
- Major exporter of beef, grains, and horticulture

### Established industries:

- Manufacturing
- Primary Industries
- Resources and Critical Minerals

### Growth areas:

- Defence and aerospace
- Energy
- Health and Life Sciences
- Primary Industries

## Greater Whitsunday

### Regional advantages

- Bowen Basin: global leader in coal and mining services
- Biofutures production leveraging climate and manufacturing base
- Innovation in sustainable agriculture and aquaculture

### Established industries:

- Manufacturing
- Resources and Critical Minerals
- Primary Industries
- Tourism
- Energy and Biofuels

### Growth areas:

- Sports and Experiences
- Critical Technology

## Darling Downs and Southwest Queensland

### Regional advantages

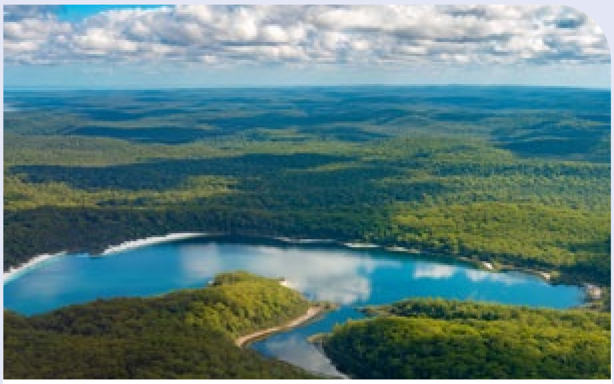
- Major centre for agricultural production and processing and a key gateway for international air export
- Innovation in AgTech and smart farming
- Resource-rich Surat Basin feeding LNG exports

### Established industries:

- Defence and Aerospace
- International Education and Training
- Primary Industries
- Resources and Critical Minerals

### Growth areas:

- Energy and Biofuels
- Manufacturing
- Tourism



## Wide Bay-Burnett

### Regional advantages

- Fertile region for diverse agricultural output
- Emerging advanced manufacturing capabilities
- Rich deposits of high quality mineral resources

### Established industries:

- Primary Industries
- Tourism
- Manufacturing
- Resources

### Growth areas:

- Energy and Biofuels
- Health, Life Science and Biomedical
- Critical Minerals

## West Moreton

### Regional advantages

- Queensland's most rapidly growing region
- Proximity to Brisbane and national logistics networks
- Diverse and resilient economy with strong contributors including manufacturing, defence, transport, agriculture, and food production
- A key national hub for agricultural exports, particularly in horticulture and beef production
- Home to Australia's largest operational defence air base

### Established industries:

- Primary Industries
- Defence and Aerospace
- International Education and Training
- Manufacturing
- Resources and Critical Minerals

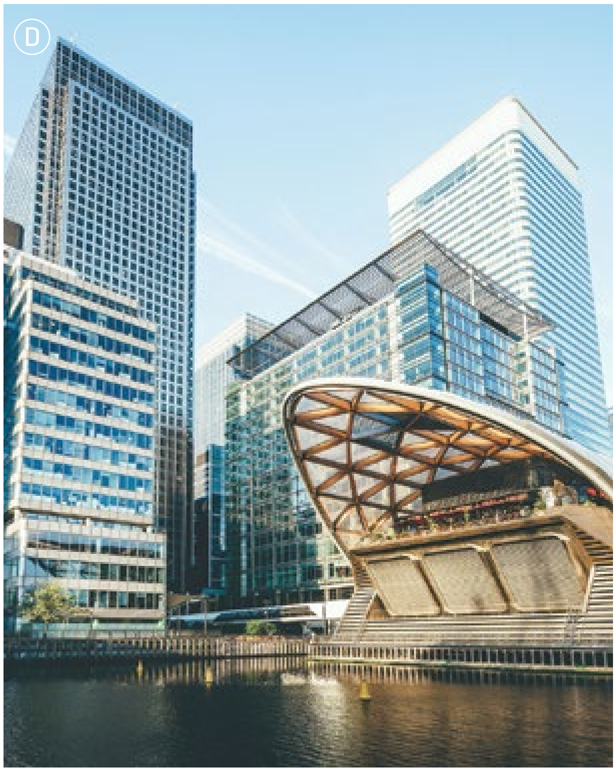
### Growth areas:

- Energy and Biofuels
- Health, Life Sciences and Biomedical
- Tourism

# Global markets

Trade and investment are no longer neutral economic activities. They are increasingly used as strategic and political levers, shaping global alliances, supply chains, technology access and economic resilience. In this environment, Queensland's success depends on where and how it engages globally, and its ability to read risk, anticipate change and act early.




A. Brussels, Belgium.
B. Abu Dhabi, United Arab Emirates.
C. Shanghai, China.
D. London, United Kingdom.

## Queensland's global trade and investment network – a competitive advantage

Queensland's global presence is a key competitive advantage. Through TIQ, Queensland has a growing presence, currently in 27 locations across 18 international markets, supported by on-the-ground capability across eight Queensland regions[35]. This network enables Queensland to:

- maintain a continuous presence in priority markets
- access early intelligence on risks and opportunities
- engage directly with decision-makers and intermediaries
- support exporters and investors in real time.

This international network is integrated with TIQ's domestic capabilities, ensuring global opportunities are connected to Queensland businesses, projects and regions. Few jurisdictions of Queensland's size maintain this level of global reach. It is a core enabler of Queensland's ability to compete, influence and deliver outcomes in global markets.

## A flexible and responsive market approach

Global markets will continue to evolve. Queensland's market engagement remains flexible, allowing effort to be adjusted as conditions change, while maintaining strong relationships and consistent engagement.

By combining focus with flexibility, Queensland will continue to build influence, secure opportunities and deliver outcomes in global markets through to 2032.

35 Trade and Investment Queensland, 2025.


**27**
locations across

**18**
international markets

# International Market Snapshot

The following regional market snapshots highlights Queensland's strategic drivers and growth prospects shaping engagement across key international markets. Queensland prioritises markets based on alignment, not size alone. Priority markets are those that:

- align with Queensland's sector and regional strengths
- offer sustained demand and partnership potential
- present investment and talent opportunities
- provide pathways to sustained export growth and diversification.

This approach ensures Queensland's global effort is focused, credible and responsive to change.

## China

- Queensland's largest trading partner and source of international students
- The world's second largest economy, driving approximately one third of global growth
- Australia's fifth largest source of FDI (combined Mainland China and Hong Kong SAR)
- World's largest middle class (400 million)

**Focus markets:** *Mainland China (particularly Tier 2, 3 and 4 cities), Hong Kong SAR*

**Strategic drivers:** China's 2026-2030 Five Year Plan prioritises stronger economic structures, sustainable growth, enhanced national security, self-reliance in science and technology, energy efficiency and renewables plus improved quality of life for citizens. Innovation-led sectors including energy, healthcare, biotechnology, manufacturing, and education can expect growth through expanded market access, regional partnerships and the large consumer base. China will promote FDI opportunities aligned with national development goals.

**Prospects for Queensland:** Queensland is well-positioned to contribute to China's industrial modernisation and meet future tourism demand, while continuing to grow exports across food, agribusiness and education services. Tier 2, 3, and 4 cities have large populations open to e-commerce, and regional partnerships in energy, manufacturing, and biotechnology.

# North America

- Australia-US Free Trade Agreement and the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) with Canada have supported two-way trade[36]
- The US is the world's largest economy[37], bigger than the next three economies combined
- The US is Australia's largest source of FDI[36]

**Focus markets:** *United States, Canada, Mexico*

**Strategic drivers:** focus areas for the US include economic resilience, technological innovation, and energy security. Canada is pursuing multi-lateral trade and security relationships due to current geopolitical and global tariff uncertainty.

Major investments in advanced manufacturing, critical minerals, and emerging technologies are reshaping supply chains, driving friendshoring and nearshoring opportunities.

**Prospects for Queensland:** Queensland has strengths in beef, critical minerals, mining, mining equipment, technology and services (METS), manufactured goods and agriculture, which create future opportunities for trade with the US and Canada. Partnerships around technology, biomedicine and semi-conductors provide prospects for growth as well as the development of collaborative defence supply chains. Demand for energy, resources and technology is strong and our strong education partnerships and tourism are a robust platform for growth. Canada also looks to Australia for resources leadership and partnerships.

# Latin America

- The Australia-Chile FTA, the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) and the Peru-Australia FTA all support growth in two-way trade[36]

**Focus markets:** *Chile, Peru, Brazil*

**Strategic drivers:** Latin American countries are seeking to accelerate economic growth and encourage sustainable development through technological adoption, improving infrastructure and enhancing agricultural productivity.

**Prospects for Queensland:** Queensland is a world leader in mining, mining equipment, technology and services (METS) and has strengths in beef, minerals and manufactured goods. Solutions which drive productivity and efficiency such as AI that are quick and easy to implement are currently untapped opportunities for consideration.

Existing growth in Latin America presents through similarities in mining, energy and agriculture and are supported by current FTAs. Potential sectors of opportunity include agtech, health tech, education, defence and security.

36 Department of Foreign Affairs and Trade, 2024.
37 World Bank Group, 2025.

# North Asia

- Japan, South Korea and Taiwan all sit in the world's top 25 economies by GDP[38] and have large, sophisticated consumer markets
- Japan is Australia's second largest source of FDI and has committed to a $211 billion Green Transformation investment into 2050 Net Zero

**Focus markets:** *Japan, South Korea, Taiwan*

**Strategic drivers:** North Asia's key economies have stated their prioritisation of innovation and technology. Japan's State Led Growth Strategy has 17 strategic sectors (including AI, shipbuilding and semiconductors) to be prioritised for investment. Overall, the region is focused on deepening partnerships in resources, agriculture and manufacturing, and emerging priorities (such as defence and semiconductors), while fostering collaboration to drive growth and resilience.

**Prospects for Queensland:** as a provider of stable, reliable and strategic cooperation, Queensland is poised to expand exports of agricultural products, education and health services, as well as digital and critical technologies to North Asia. It is also well placed to attract foreign direct investment and forge innovation partnerships in emerging key sectors – energy, agtech, defence and semiconductors – to support growth and transformation.

# South Asia

- South Asia provides a large, young labour resource and a significant consumption market
- India's stable government, youth, digital payments infrastructure and deep capital markets support strong growth

**Focus market**: *India*

**Strategic drivers:** India's government is investing in physical infrastructure, providing roads, energy and digital resources to increase productivity and create jobs. As the movement of informal economic activity into more formal sectors advances, financial discipline and private investment are growing. These changes plus on-going urbanisation increase demand for critical minerals, health innovation, manufacturing, technology partnerships and skill development.

**Prospects for Queensland:** India's ambition is to become a resilient high-income economy and a global leader in innovation. Queensland is uniquely positioned to partner with India's economic transformation by supplying critical minerals, energy, health innovation, and manufacturing solutions, as well as high-quality food, and education services.

38 World Bank Group, 2025.

## Southeast Asia

- Vietnam is Queensland's largest goods export market in Southeast Asia and sixth globally
- The region's population of 686 million[39] delivers a large work force and growing trade demand

**Focus markets:** *Vietnam, Singapore, Indonesia, Thailand*

**Strategic drivers:** supported by ongoing population growth, Southeast Asia is focused on infrastructure development, digital transformation, energy and manufacturing. Significant investment in critical minerals and electric mobility – combined with rising incomes and urbanisation – is driving demand for technology, sustainability and integrated supply chains.

**Prospects for Queensland:** promotion of Queensland's capabilities in manufacturing, advanced manufacturing, tourism, IET, biotechnology, biofuels, agriculture, agtech and critical minerals and resources is occurring through the *QueensLand of Opportunity* initiative. Our strategic location supports provision of premium food and beverages to meet growing demand in Southeast Asia. In particular, growth in Vietnam is creating a positive environment for provision of manufacturing equipment and services.

## UK and Europe

- One of the world's largest economies (representing one sixth of global GDP)[39]
- Four of the largest sources of Australia's FDI inflows (UK, Germany, France, Netherlands)[40]

**Focus markets:** *United Kingdom, Germany, France*

**Strategic drivers:** Europe's Committee of Regions is prioritising cohesion, proximity and resilience while the United Kingdom has elevated Defence Readiness, the Indo-Pacific (joined CPTPP) and International Development. These themes translate into focus on energy stability, manufacturing, defence capability, disaster resilience, science diplomacy and digital transformation, with emphasis on secure supply chains, innovation, and sustainability.

**Prospects for Queensland:** the EU/UK agenda creates opportunities for Queensland's critical minerals, energy, high-tech solutions and manufacturing expertise.

Professional services partnerships focused on disaster planning, sustainability and climate resilience will support regional goals to achieve industrial renewal and competitiveness. This opens doors for Queensland to collaborate on major infrastructure, defence, and research projects to support the region's transformation and sustainability goals.

39 World Bank Group, 2025.
40 Australian Bureau of Statistics, 2025.

# Middle East and North Africa (MENA)

- Australia-UAE Comprehensive Economic Partnership Agreement has removed tariffs on beef, sheep meat and dairy[41]
- Sustained demand for premium meat products and dairy is a significant opportunity for Queensland exporters

**Focus markets:** *UAE, Saudi Arabia, Qatar*

**Strategic drivers:** the MENA region's countries are charting a deliberate diversification path toward global competitiveness. Regional strategies include expansion of non-oil trade, foreign investment attraction with innovation, sustainability and resilience at their core. Major initiatives in talent attraction, manufacturing, energy, AI and infrastructure are establishing the region as a hub for finance, computing and international engagement.

**Prospects for Queensland:** MENA's development agendas align with Queensland's strengths in premium beef, dairy and grains plus mining technology, food processing equipment, energy, and infrastructure. By leveraging our expertise in education, health, urban and smart cities development, plus sports innovation, Queensland is well-positioned as a partner for the region as it pursues its ambitious growth path.

(North Africa includes Algeria, Egypt, Libya, Morocco, Sudan, Tunisia and Western Sahara.)

# The Pacific

- Made up of 14 Pacific Island countries, Australia and New Zealand
- Over one third of all Pacific Islanders in Australia, live in Queensland[42]
- Pacific Trade Strategy promotes economic partnerships

**Focus markets:** *New Zealand, PNG, Fiji, Samoa*

**Strategic drivers:** the Pacific Roadmap for Economic Development created by the Pacific Islands Forum[41] looks out to 2030. Its strategic focus areas are economic growth for resilience, growth and stability; financial integration for resilience; and raising capacity to implement these two areas. Expanding sustainable energy projects, modernising agribusiness and closing infrastructure gaps – alongside commitments to decarbonisation and food security – remain central priorities across the region.

**Prospects for Queensland:** close relationships with New Zealand and other Pacific nations underpin deep engagement in this region. Regional growth is creating opportunities for Queensland in clean energy, resilient infrastructure and sustainable agriculture. The mining sectors of PNG provide specialised service opportunities while tourism and education continue to grow.

41 Department of Foreign Affairs and Trade, 2024.
42 Australian Bureau of Statistics, 2025.

# Queensland's path forward

## This strategy marks the starting point for the next phase of Queensland's global trade and investment effort. Its success will be defined by its deliberate implementation through focused action, strong coordination and disciplined delivery.

Queensland will:

- activate key sectors, regions and markets through targeted engagement and investment attraction
- deepen global relationships and convert them into tangible trade and investment outcomes
- support businesses to act with confidence as they enter and grow in global markets
- align trade and investment effort with Queensland Government priorities and industry capability
- measure progress and adapt as global conditions evolve.

Delivery will continue through a whole-of-Queensland approach, aligning government departments and agencies, industry, regions and partners behind shared priorities and coordinated global engagement.

Queensland Government

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