Queensland – United States

Trade and Investment Strategy 2026–2028

Queensland Government

TIQ TRADE + INVESTMENT QUEENSLAND

Mission statement

Position Queensland as a trusted economic, innovation and security partner for the United States, converting shared interests into practical outcomes for both markets.

Minister’s foreword

In a time of global uncertainty, intensifying competition and shifting trade settings, Queensland is focused on strengthening partnerships with trusted allies. These partners share our values, commitment to economic security and ambition to grow industries that create jobs and prosperity for Queenslanders.

The United States (US) is central to that effort. It is Queensland’s fastest-growing major export market and a leading source of foreign direct investment, supporting jobs, industries and communities across our state.

And our cooperation with the US extends well beyond trade. It is underpinned by strong defence and security ties, long-term relationships and a growing alignment in other areas such as critical minerals, advanced manufacturing, biomedical innovation, biofuels, digital technology and emerging industries.

The Queensland Government is backing our state through a strong, outward-looking trading focus. We are open for business, supporting industry and attracting the investment needed to deliver a better lifestyle through a stronger economy.

Our *Queensland-US Trade and Investment Strategy 2026-2028* reflects that commitment. It focuses on practical action to help more Queensland businesses enter the US market, grow exports, attract investment, build commercial partnerships and contribute to secure supply chains.

Queensland has what the world needs. From our world-class resources and energy sector to our strengths across key sectors, Queensland is well placed to support current and emerging US priorities.

Queensland has a compelling story to tell. Through this Strategy and through the work of the Queensland Government and Trade and Investment Queensland on the ground, we are ensuring our story is heard loud and clear across the US.

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

Contents

Intellidesign, Brisbane

Why the United States?

Queensland's relationship with the United States (US) is built on a shared history, strategic alignment, economic opportunity and deep engagement.

From the presence of more than 80,000 American soldiers in Brisbane during World War II[1] to collaboration between the Los Angeles 2028 (LA28) and 2032 Olympic and Paralympic Games, the ties between Queensland and the US are deep and enduring.

Today, the US is one of Queensland's most significant economic and strategic partners. It is the state's fastest-growing major export market, with exports increasing by 52.7% to $5.4 billion in 2025[2], and plays a central role as a source of foreign direct investment (FDI) and a two-way investment partner. Beyond trade and investment, the US remains one of Australia's closest allies, underpinning cooperation across defence, foreign policy and economic security.

This partnership is reinforced through cooperation in the Indo-Pacific and engagement in multilateral and bilateral frameworks, including the Australia–United Kingdom–United States partnership (AUKUS), the Quadrilateral Security Dialogue (Quad), and the Australia–United States Ministerial Consultations (AUSMIN).

As the world's largest economy and consumer market with world-leading e-commerce, the US offers substantial potential for Queensland businesses. Access to capital, advanced technologies and mature commercial ecosystems position the US as a critical market for expanding trade, attracting investment and forming high-value partnerships.

Queensland's strengths in biomedical innovation, sustainable biofuels, defence, critical minerals, energy technologies and advanced manufacturing align closely with US demand and investment priorities. These capabilities enable Queensland to partner with leading US research institutions, integrate into global supply chains and accelerate the commercialisation of new technologies.

Strong agricultural trade, led by premium beef exports alongside growing demand for horticulture products and seafood, complements opportunities in emerging industries and supports economic diversification.

The US policy environment presents both opportunities and challenges. Efforts to strengthen domestic capability and reduce reliance on strategic competitors are shaping approaches across trade, investment, technology and defence.

Given the scale and competitiveness of the US market, Queensland's approach must remain targeted, practical and commercially focused. This Strategy prioritises areas of strongest alignment between Queensland capabilities and US demand, ensuring effort is directed where it can deliver the greatest economic and strategic impact.

1 United States forces in Queensland, 1941–45 | naa.gov.au
2 World Economic Outlook (October 2025) - GDP, current prices

Australia's largest source of FDI – A$258.1 billion in 2025[3]

The world's largest consumer market worth $19.8 trillion[4]

Queensland's fastest growing major export market in 2025[5]

World's largest economy – GDP of US$32.4 trillion (2026 projection)[6]

The US is a **highly diversified market** with demands for many Queensland products

Host of LA28 Olympic and Paralympic Games[7]

3 International Investment Position, Australia: Supplementary Statistics, 2025
4 United States - Household Final Consumption Expenditure - 2026 Data 2027 Forecast 1960-2024 Historical
5 QGSO: Exports of Queensland goods overseas, December 2025
6 IMF World Economic Outlook, April 2026
7 Brisbane 2032 Olympic and Paralympic Games | Brisbane 2032 / LA 2028

Market snapshot

	US
Population (2026)[8]	342.6 million
GDP per capita (2026)[9]	US$94,430
Queensland exports (2025)[10]	A$5.4 billion
Queensland imports (2025)[11]	A$8.1 billion
FDI to Australia (2025)[12]	A$258.1 billion
International students enrolments (2025)[13]	1,178
International visitors to Queensland (2024)[14]	228,000

8 IMF World Economic Outlook (April 2026) Population
9 IMF World Economic Outlook (April 2026) GDP per capita, current prices
10 Queensland Government Statistician's Office (QGSO), (2025)
11 Queensland Government Statistician's Office (QGSO), (2025)
12 International Investment Position, Australia: Supplementary Statistics, Australia Bureau of Statistics, 2024
13 International student monthly summary and data tables - Department of Education, Australian Government
14 International Visitation Survey, Year Ending December 2025

Los Angeles, California

Market dynamics

The US' place in a changing world

Against a backdrop of increasing global uncertainty, the US is pursuing an 'America First' agenda that prioritises core interests using economic, trade, diplomatic and defence policy as geostrategic levers[15].

Tariffs, export controls and supply chains are at the core of policy, as the US focuses on shoring up national and economic security, and growing domestic manufacturing capability to reduce dependence on competitors.

Critical minerals are a clear example, with the US and Australia moving to increase cooperation through the establishment of a framework for securing supply in mining and processing critical minerals and rare earths[16].

For Queensland, this equals opportunity. With our resources, mining equipment, technology and services (METS) capabilities, processing potential and ESG credentials, our state is positioned as a valuable partner in diversified critical minerals supply chains.

The US is also strengthening defence industrial cooperation with Australia. For Queensland, this supports a stronger defence focus across capabilities in advanced manufacturing, sustainment, cyber, autonomous systems, hypersonics, space and tropical operating capability.

15 America First Policy Directive To The Secretary Of State – The White House
16 United States–Australia Framework for Securing of Supply in the Mining and Processing of Critical Minerals and Rare Earths | Department of Industry Science and Resources

Economic resilience and reinvention

The US is the world's largest economy, with GDP projected to reach **US$32.4 trillion**[17] in 2026. Despite global volatility, it continues to demonstrate strong economic fundamentals, supported by robust household consumption and investment. The International Monetary Fund (IMF) projects economic growth of about 2.3% in 2026[18], underpinned by steady labour markets and resilient private sector activity.

Fiscal pressures and high public debt are prompting more active industrial and trade policies, with tariffs and investment incentives used to strengthen domestic manufacturing and secure supply chains.

Structural challenges persist, with the US facing many of the same headwinds afflicting other middle- and high-income countries. These include labour shortages, high public debt and sticky inflation, resulting in prices that are slow to change even when economic conditions soften.

The US is undergoing a major industrial and security reset to strengthen economic resilience and technological leadership. Central to this is a focus on industrial self-reliance, supported by large-scale federal programs in critical minerals, advanced manufacturing and supply chain security.

Significant investment in artificial intelligence (AI), quantum technologies and cyber capabilities reflects the US' goal of maintaining leadership in emerging technologies. Defence and security remain key priorities, with initiatives such as AUKUS and the Quad reinforcing alliances, maritime security and supply chain resilience across the Indo-Pacific.

17 IMF World Economic Outlook Database, April 2026 (nominal GDP)
18 IMF World Economic Outlook Database, April 2026 (real GDP growth forecast)

Future outlook

The US is set to maintain its position as a globally influential economy. This will be driven by deepening integration across markets and sustained investment in strategic industries. While the US pursues its own national priorities, shared themes are emerging such as strategies to reduce external supply chain vulnerabilities and anchor growth in sustainable, innovation-driven sectors.

This includes diversifying energy sources and strengthening resilience against trade and security shocks. As supply chains continue to evolve, the US is expected to remain a magnet for investment and a centre for technological innovation, particularly in digital services, energy and advanced manufacturing.

For Queensland, these dynamics signal enduring opportunities across multiple fronts. Demand for responsibly sourced resources, premium food exports and energy will continue to grow, while pathways for collaboration in research, education and high-technology industries are expanding.

Queensland's reputation for stability, sustainability and high production standards positions it to be a long-term partner with the US, contributing to future growth for both countries.

San Francisco, US

Prospects for Queensland

The US is Queensland's largest North American trading partner and a major source of investment accounting for 9% of TIQ's export outcomes during 2025, compared to approximately 5% of all Queensland's exports, highlighting the strategic importance of the market and TIQ's contribution to supporting Queensland exporters.[19]

Queensland's critical minerals and energy technologies support major US policies such as the One Big Beautiful Bill Act (2025), and the 2023 Australia-US Climate, Critical Minerals and Clean Energy Transformation Compact. Additional frameworks, including the 2025 Critical Minerals Framework, further strengthen cooperation by securing supply chains and encouraging investment in Queensland's resources and technologies.

Queensland is widely recognised as Australia's "beef state", with the Department of Primary Industries confirming that the state has Australia's largest beef cattle sector, accounting for around 45% of the national cattle herd.[20]

The US is Queensland's top export market for premium beef, valued at $2.5 billion in 2025, 20.5% higher than the previous year. The US is also an important niche export market for Queensland's high-value horticulture and seafood commodities, including mangoes, macadamia nuts, tropical rock lobster and coral trout.

A focus on premium protein, food and AgTech will support Queensland to expand its food exports while using technology and value adding to grow long-term market presence in the US. This will build on Queensland's beef position in the US market by identifying premium and niche food opportunities by US region and offering support to exporters with targeted buyer introductions and market intelligence. Aligned with *Primary Industries Prosper 2050* and Queensland's ambition to boost its primary industries output to $30 billion by 2030, this will connect Queensland AgTech and food innovation firms to US partners accessing aviation links for time sensitive premium products where viable.

Queensland exporters are increasingly well positioned to access the US market through e-commerce channels. Australian brands are viewed favourably in the US for their quality, safety, sustainability and authenticity — particularly across categories such as food and beverage, health and wellness, beauty and lifestyle products, as well as agricultural technologies. Digital marketplaces including Amazon, Walmart and Shopify-enabled direct-to-consumer channels now allow Queensland businesses to reach US consumers without a traditional on-the-ground retail footprint, while the Australia-United States Free Trade Agreement (AUSFTA) continues to provide preferential market access and minimise tariff barriers between the two countries. Success depends on strong digital marketing, efficient fulfilment and clear brand positioning, but for export-ready Queensland companies, e-commerce provides a scalable pathway into a large and sophisticated market.

This strategy focuses on initiatives to drive trade, investment and partnership outcomes between Queensland and the US, leveraging the 2032 Olympics runway, strengthening allied supply chains, and positioning Queensland as a trusted partner in biomedical innovation, energy security and premium food production. Collectively, these initiatives target high-value opportunities, including sportstech, critical minerals, clinical trials, future fuels and agribusiness exports, while connecting Queensland capabilities with US capital, technology and markets to deliver export growth, investment attraction and stronger sovereign capability by 2028.

19 A TIQ outcome refers to an export or investment success directly supported by TIQ.
20 Livestock data | Department of Primary Industries, Queensland

Priority US market corridors

Given the scale of the US market, Queensland's effort will focus on priority corridors where there is a clear fit between US demand and Queensland capability.

The sprawling Southern Californian city of LA represents Queensland's most immediate and diversified trade and investment opportunity set, anchored by LA 2028 to the 2032 Olympic and Paralympic Games connection. This corridor supports collaboration across screen production, creative industries, sportstech, tourism, aviation and major events, while also providing deep capability in biotech, clean technology, defence, and advanced manufacturing. Complementing this, the San Francisco Bay Area offers a globally significant ecosystem for high-value innovation, including AI, quantum, biotech, medtech, climate tech, digital health and deep tech. Together, these markets provide a critical platform for scaling technology partnerships, attracting capital, and advancing research and commercialisation outcomes.

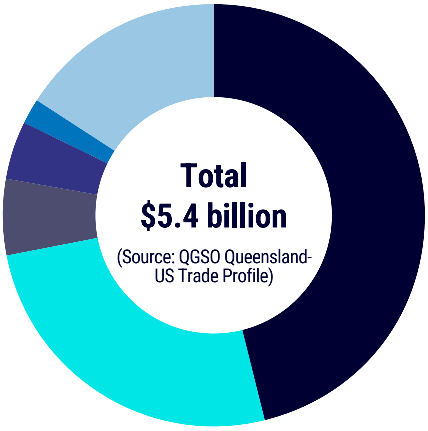
Washington DC, Texas and the US Northeast form additional strategic corridors focused on policy influence, defence engagement, resources and life sciences. Washington DC and Virginia are central to AUKUS, national security, critical minerals policy and federal procurement, making them essential for government and defence-linked engagement. Texas, particularly Houston and Dallas-Fort Worth, aligns strongly with Queensland's strengths in energy, resources, aerospace, agribusiness, logistics and infrastructure, and biotech, while also offering aviation connectivity into broader US markets. Boston and the northeast provide world-leading life sciences and research ecosystems, with opportunities in biotech, medtech, clinical trials and translational research, supported by leading universities and institutional investors. Together, these regions offer significant opportunities for Queensland if approached with a coordinated strategy spanning policy, industry collaboration and high-value investment attraction.

Strategic and market access frameworks

Queensland's engagement with the US is supported by a deep architecture of strategic, trade and security frameworks which support market access, defence and technology cooperation, procurement pathways, trusted supply chains, investment attraction and economic security.

AUKUS[21] Security Partnership	AUKUS is a trilateral security partnership between Australia, the United Kingdom (UK) and the US to enhance defence ties and jointly develop advanced defence technologies to promote Indo-Pacific stability. AUKUS was announced on 15 September 2021 by Australian, UK and US leaders.[22]
United States-Australia Critical Minerals Framework[23]	The US–Australia Critical Minerals Framework is a bilateral agreement to strengthen cooperation on mining, processing, and investment to secure diversified, resilient supply chains for critical minerals and rare earths essential to defence, energy, and advanced technologies. It establishes coordinated policy tools, financing, and project development to accelerate supply while reducing reliance on concentrated global sources and managing supply chain risks.
Quadrilateral Security Dialogue (Quad)[24]	The Quad – Australia, Japan, India and the US – is a strategic partnership promoting a free, open Indo-Pacific. While rooted in security, it also advances cooperation on infrastructure, supply chains, technology, and economic issues. The Quad strengthens regional leadership and deepens ties, offering a platform for collaboration in shared priorities such as energy, digital innovation, and critical minerals.
Australia-United States Free Trade Agreement (AUSFTA)[25]	The AUSFTA entered into force on 1 January 2005. Upon AUSFTA's entry into force, more than 97% of Australia's non-agricultural exports to the US (excluding textiles and clothing) became duty free and two-thirds of agricultural tariff lines went to zero. Under AUSFTA, Australian companies also have access to the federal government procurement market in the US and the government procurement markets of 31 US states.
Australia-New Zealand-United States (ANZUS) Security Treaty[26]	The ANZUS Treaty was signed by the parties in San Francisco in 1951 and entered into force in 1952. The ANZUS Treaty underpins the Australia-US Alliance. It binds Australia and the US to consult on mutual threats, and, in accordance with our respective constitutional processes, to act to meet common dangers.
Five Eyes[27]	The 'Five Eyes' is an intelligence-sharing alliance between Australia, Canada, New Zealand, the UK and US, developed out of World War II-era agreements between the UK and US. Cooperation covers areas including counterterrorism, counter-proliferation, cybersecurity and regional challenges.
The Australia-United States Defence Trade Cooperation Treaty[28]	The Australia-US Defence Trade Cooperation Treaty establishes a framework to streamline the exchange of defence goods, services, and technology between trusted government and industry participants in both countries by removing many export licensing requirements. It enhances interoperability and capability development by enabling faster, more efficient access to defence equipment and technical data within an approved bilateral community.

21 AUKUSFactsheet.pdf
22 Joint media statement: Australia to pursue nuclear-powered submarines through new trilateral enhanced security partnership | Defence Ministers
23 United States-Australia Framework For Securing of Supply in the Mining and Processing of Critical Minerals and Rare Earths – The White House
24 The Quad | Australian Government Department of Foreign Affairs and Trade
25 Australia-United States FTA | Australian Government Department of Foreign Affairs and Trade
26 Australia and the United States | Australia in the USA
27 How we work with others | National Intelligence Community
28 Australia-US Defence Trade Cooperation Treaty | Business & Industry | Defence



Queensland goods exports to US (2025)

- Meat **46.3%**
- Non-ferrous metals **25.9%**
- Transport equipment (excl. road vehicles) **5.6%**
- Animal fats and oils **4.5%**
- Other general industrial machinery **1.9%**
- Other **15.8%**

Los Angeles, US

Opportunities and challenges for Queensland

Opportunities
• Deepen Queensland's role in AUKUS Pillar II, including advanced manufacturing, cybersecurity and AI-enabled technologies.
• Strengthen participation in US defence supply chains by leveraging Australia's qualifying country status and building relationships with US Government agencies in defence and critical minerals.
• Supply critical minerals to meet growing US demand for secure, ESG-compliant resources.
• Leverage AUSFTA to maintain low tariffs, strong legal protections and predictable market access.
• Expand exports of premium beef, horticulture and seafood, building on Queensland's strengths in high-quality food production including through e-commerce.
• Attract US investment by positioning Queensland's energy, resources, infrastructure, AgTech, and biotech sectors as globally competitive and investment-ready.
• Grow Queensland's biomedical and life sciences ecosystem by: – Promoting fast clinical trial start-up and translational research capabilities. – Offering cost-efficient commercialisation pathways into the Asia-Pacific. – Provide access to a pipeline of mature, investment-ready companies with lower risk profiles.
• Partner with leading US firms in digital technology, AI and quantum computing, and build on strong research, education and innovation linkages.
• Position Queensland as a cost-efficient alternative for research and medical innovation.
• Establish Queensland as a global hub for content production, leveraging convergence across film, television, gaming and virtual production technologies.

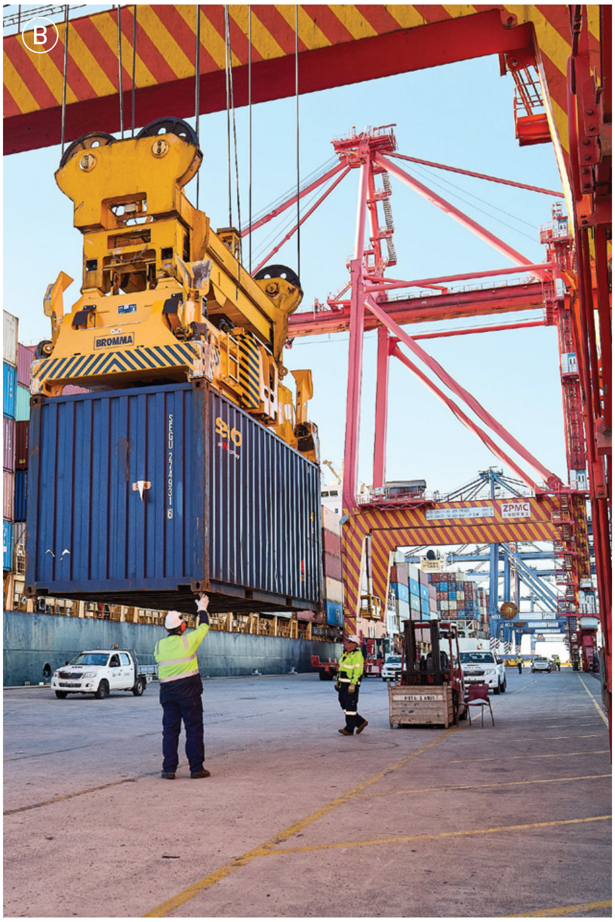
Challenges

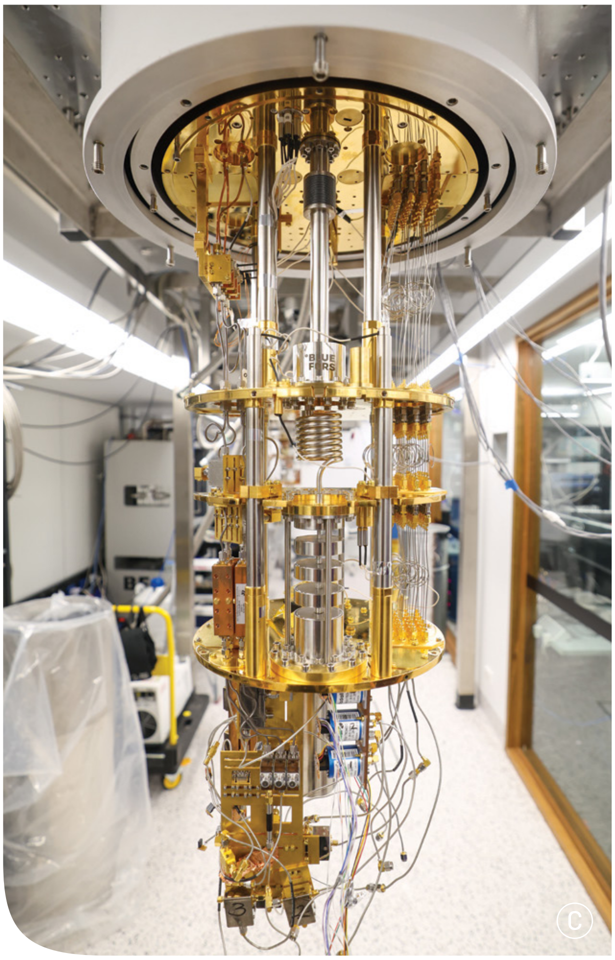
- Tariff volatility as the US uses trade measures as a geopolitical and revenue tool, creating market uncertainty.
- Rising public debt and fiscal pressures could shift policy priorities and consumer demand.
- An 'America First' approach may reduce support for multilateral trade and security institutions due to added expense e.g. clinical trials.
- Intensified competition for critical minerals and technology partnerships from other US allies.
- Complex and evolving regulatory standards, particularly in advanced technology and data governance.
- US push to onshore biomanufacturing reducing appetite for offshore production, particularly for US Government-funded procurement.

Brisbane, Queensland

Queensland and the US are anchored in partnership. Positioned for opportunity.

Manhattan, New York, US





A. University of Queensland Life sciences research lab
B. Port of Brisbane
C. University of Queensland Quantum computing cryogenic system
D. XR Hub at The Precinct, Fortitude Valley

Strategic priority sectors

Resources and energy

Promote Queensland as the premier destination for transparent, de-risked investment in strategic and critical minerals, renewable energy and advanced energy solutions.

Defence, aerospace and national security

Position Queensland as the US' trusted, innovative partner in defence, national security and aerospace capability.

Critical and enabling technologies

Position Queensland as the Asia-Pacific hub for quantum and other emerging platform technologies.

Food and agribusiness (including AgTech)

Leveraging Queensland's premium produce and AgTech innovation to advance sustainable and secure agrifood systems and partnerships.

Life sciences and health innovation

Strengthen and scale Queensland's globally competitive life sciences ecosystem to deliver world-class health and biotech innovations.

Sports infrastructure

Champion Queensland's capabilities in sports infrastructure and services to support successful delivery of the 2032 Olympic and Paralympic Games.

Resources and energy

The Queensland advantage

Queensland offers the US a secure and reliable partner across both traditional resources and the critical minerals essential to the global energy transition and advanced manufacturing. The state holds some of the world's richest reserves of copper, nickel, cobalt, graphite and rare earth elements – critical inputs into batteries, electric vehicles, clean energy technologies and defence applications, alongside metallurgical coal and gas that continue to underpin global industry.

Queensland is increasingly focused on moving up the critical minerals value chain, with opportunities in extraction, processing and downstream manufacturing. Supported by a transparent regulatory framework, strong ESG credentials and proximity to Asia-Pacific markets, Queensland provides US partners with de-risked, diversified and responsible supply chain options for critical minerals.

Complementing these resources is a globally competitive METS sector, delivering advanced technologies and services that improve productivity, safety and environmental outcomes. This capability extends into critical minerals extraction, processing innovation and automation, enhancing Queensland's attractiveness as a partner in building resilient and technologically advanced supply chains.

Queensland is also a leader in energy production. In October 2025, Queensland released its *Energy Roadmap*, a pragmatic plan to optimise existing energy assets while building the infrastructure needed for an affordable, reliable and sustainable energy system. The Roadmap highlights a significant role for private sector and international investment, including from the US, to deliver renewable generation, storage, transmission and enabling infrastructure.

Biofuels is one of three priority industries for the Queensland Government to build sovereign capability, unlock new economic opportunities and grow regional economies. The government is working with industry to increase feedstock availability, address regulatory barriers and progress commercially viable biofuel projects.

Primary Industries Prosper 2050 sets out a clear agenda for growth in mature markets such as the US, including:

- Primary industries plus: generating new income streams through energy, waste, environmental markets and emerging technologies
- Value-adding: investing in regional processing, advanced manufacturing and new product development (e.g. protein products, biofuels, nutraceuticals).

With abundant solar and wind resources, established export infrastructure, and a strong base for biofuel and bioenergy development, Queensland is well placed to supply future energy needs. Combined with its natural resources and critical minerals endowment, Queensland is positioned as a key partner for the US for the breadth of its supply chain, from raw materials through to value-added products.

TIQ initiatives

1. **Align Queensland projects with the US–Australia Critical Minerals Framework** and position Queensland as a preferred destination for US investment to deliver the state's *Energy Roadmap*, with a strong focus on critical minerals extraction, processing and downstream opportunities, alongside renewables and biofuels.

2. **Showcase Queensland as an Asia-Pacific hub** for critical minerals, renewable energy and emerging biofuel industries, highlighting its role in supporting secure, sustainable and diversified US supply chains.

3. **Engage with US state government agencies** and collaborate with Australian Government agencies to position Queensland projects for finance and offtake support.

What success looks like in 2028

Sustained increase in US investment, qualified investor leads, progressed offtake, and financing and strategic partnership discussions with Queensland proponents across critical minerals, clean energy and future fuels.

Expansion of Queensland's critical minerals processing and downstream industries, strengthening its position as a high-ESG, value-added supplier integrated into secure US-APAC supply chains for energy, defence and advanced manufacturing.

Growth in exports of Queensland METS, renewable technologies and low-emissions solutions to the US, demonstrating stronger commercial links and global competitiveness.

Rising US investment in biofuels and SAF sectors, supporting supply chain resilience, enhancing fuel security and sovereign capability, and driving regional economic and job growth.

Graphite extraction at Graphinex, Townsville

Defence, aerospace and national security

The Queensland advantage

Queensland is home to world-class defence and aerospace manufacturing and sustainment, advanced research, and a growing commercial space industry. The state hosts a concentration of globally significant defence manufacturers and highly capable local suppliers, including:

- Boeing Defence Australia's MQ-28 Ghost Bat production line
- Northrop Grumman providing maintenance, repair and overhaul services for the Royal Australian Air Force's fleets of KC-30A Multi-Role Tanker and C-27J Spartan transports
- Gilmour Space Technologies and its Bowen Orbital Spaceport in North Queensland
- Australia's core hypersonic research cluster encompassing the Australian Hypersonics Research Precinct, The University of Queensland's world-leading scramjet team and home-grown start-ups such as Hypersonix Launch Systems.

These capabilities and research assets, combined with strong links to research and innovation hubs, position Queensland as a trusted partner for advanced technology development.

In addition, Queensland offers capabilities in tropical medicine, biosecurity, medical technologies and digital health aligned with US government defence priorities.

The AUKUS trilateral strategic defence arrangement and the US-Australia Defence Trade Cooperation Treaty are reducing barriers for defence and related collaboration, removing the need for the traditional US export licences for many defence articles, services and data. With shared security priorities in the Indo-Pacific, Queensland companies are well placed to support US primes, scaleups, defence agencies and space partners with sovereign capabilities, resilient supply chains, talent, test sites and cutting-edge technologies.

TIQ initiatives

1. **Engage with US primes, integrators and agencies** to build long-term partnerships in research and development (R&D), co-manufacturing and sustainment to support supply chain resilience and innovation.
2. **Support Queensland companies** to participate in AUKUS opportunities.
3. **Work with Australian Government agencies** to help Queensland firms navigate procurement, export controls and defence trade pathways.
4. **Connect US firms with Queensland test sites,** manufacturing partners, research institutions and regional locations.
5. **Position Queensland's tropical operating environment** as a distinctive defence and resilience asset.

What success looks like in 2028

Queensland defence and space companies securing sustained contracts and partnerships with US primes and government agencies.

Increased US investment across Queensland's defence, national security and aerospace value chains.

Queensland is recognised in the US as a reliable and innovative partner in defence and space, through a visible presence at key trade events.

MQ28-A Ghost Bat, Boeing Australia

Critical and enabling technologies

The Queensland advantage

Queensland is an ideal location for world-class research and capabilities in frontier technologies, presenting opportunities for collaboration in quantum, compound semiconductors, advanced sovereign manufacturing, robotics and AI. Building on a legacy of research excellence, strong research-industry collaboration, and a trusted regulatory environment, Queensland is a natural partner for US innovators seeking a strategic entry point into the Asia-Pacific.

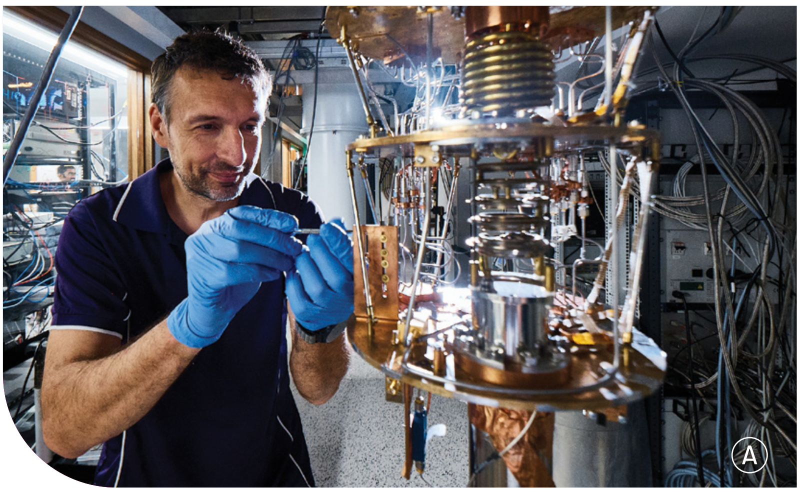
Queensland is establishing leadership in deep-tech. This includes technologies based on advanced scientific research and engineering that solve complex, global problems and typically require long-term R&D, significant capital and specialist expertise to commercialise, including:

- quantum technologies (e.g. quantum computing, sensing)
- biotech and life sciences (e.g. therapeutics, diagnostics)
- advanced materials and nanotechnology
- AI and machine learning (at the frontier level)
- robotics and autonomous systems
- space technologies
- advanced manufacturing (e.g. additive manufacturing, precision engineering)

AgTech, including biotech, is revolutionising Queensland's primary industries sector by embracing automation and digital transformation of farming, fishing, and forestry systems and supply chains.

Innovations in robotics, autonomous vehicles, protected cropping and digital tools, alongside research innovation and extension, will boost productivity and profitability and increase agriculture and food exports to the US.

The Queensland Government has established the $30 million *Sowing the Seeds of Farming Innovation Fund (SSFIF)* to support innovation and productivity growth across Queensland's primary industries. US investment into AgTech and innovation deals could leverage the SSFIF to seize agricultural opportunities across both markets.



A. University of Queensland
B. Queensland XR Hub, Brisbane
C. BiVACOR heart

TIQ initiatives

1. **Promote Queensland's leadership in deep tech** by showcasing its research institutions, startups, innovation funds and advanced manufacturing clusters.
2. **Drive targeted engagement through US missions, events and partnerships** to build awareness and credibility with US firms and investors.
3. **Facilitate commercialisation pathways** for frontier technologies by supporting joint ventures, licensing agreements, research partnerships and pilot projects in Queensland for export to US-Asia-Pacific supply chains.
4. **Support Queensland companies to access US capital,** customers and commercialisation partners, while actively connecting US investors and firms with Queensland's innovation ecosystem to drive inward investment and co-investment opportunities.
5. **Focus trade and investment engagement on high-impact sectors** including defence, biomedical, agriculture, energy and critical minerals, ensuring collaboration aligns with shared economic and security priorities.

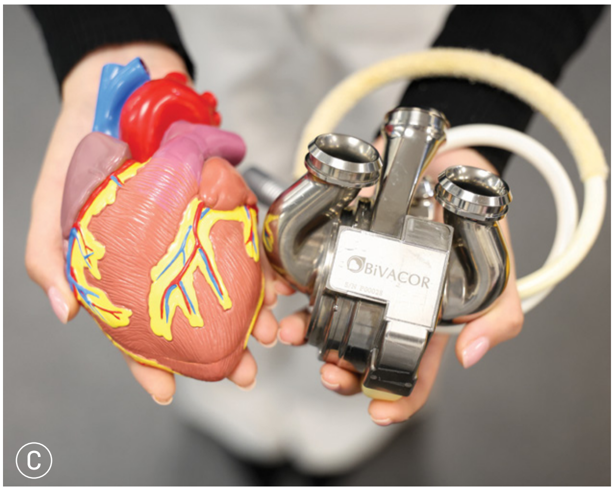
What success looks like in 2028

Strong pipeline of active partnerships between US firms and Queensland research institutions, start-ups and advanced manufacturing clusters, with Queensland recognised as a preferred innovation partner.

Increased number of joint ventures, licensing deals and pilot projects successfully commercialised, with Queensland technologies embedded in US-Asia-Pacific supply chains.

Expanded US investment into Queensland AgTech and innovation (leveraging SSFIF), driving productivity gains and measurable growth in AgTech exports to the US.


B



C

Semiconductor design and development

Global demand for semiconductors continues to accelerate, driven by advancements in AI, defence, and national security applications. Queensland's established capabilities in advanced manufacturing and systems design position the state to play a critical role in supporting this growth. Strategic partnerships with US semiconductor design and development firms can enable Queensland to become a trusted ally in delivering secure, high-performance solutions for sensitive and sovereign use cases while generating long-term economic benefits and high-value job creation across the state.

R&D partnerships

Queensland offers US partners a proven platform for applied R&D, technical validation, and translational research, anchored by globally recognised universities with deep industry alignment. Institutions such as The University of Queensland – ranked Australia's leading university in the TIMES Global Ranking, with top national strengths across health, agriculture, mining, sports science, tech transfer, and synthetic biology – sit alongside applied, industry-facing universities including QUT, and regionally embedded partners such as CQ University, University of Southern Queensland and James Cook University. Together, they deliver contracted R&D, testing and pilot activity directly into commercial and regulatory pipelines.

For US corporates and institutions, access to Queensland's R&D capability strengthens the value proposition of market entry by reducing technical, regulatory, and execution risk. Early engagement through research, pilots, and validation provides a low-friction entry point that builds confidence, local insight, and pathways for deeper operational presence.

These R&D partnerships can scale into broader commercial activity and larger foreign direct investment, creating high-value jobs in Queensland while embedding local innovations into global supply chains. By anchoring capability, relationships, and market access through research collaboration, Queensland's ecosystem translates early technical engagement into sustained investment and long-term growth.

A. QUT Pioneer BioPilot, Mackay

B. Defence manufacturing, Queensland

C. Vaxxas employee with needle-free vaccine

Food and agribusiness (including AgTech)

The Queensland advantage

Queensland is one of the world's leading producers of premium food and fibre, with a globally recognised reputation for quality, safety, sustainability and traceability. The US is Queensland's top export market for beef, valued at $2.5 billion in 2025, 20.5% higher than the previous year, demonstrating strong and growing demand for high-quality protein.

Queensland underpins Australia's position as a global beef exporter, accounting for approximately 46% of the national cattle herd (more than 13 million head) and generating around 58% of Australia's beef exports.[29] This scale, combined with world-class production systems and strong biosecurity standards, positions Queensland as a reliable, high-value supplier to the US market.

Beyond beef, the US represents an important niche market for Queensland's premium horticulture and seafood products, including mangoes, macadamia nuts, tropical rock lobster and coral trout. These categories align with US demand for differentiated, high-quality and sustainably produced food products, particularly in premium and health-conscious consumer segments.

Queensland's long-term growth agenda for primary industries, under *Primary Industries Prosper 2050*, focuses on expanding value, resilience and market diversification in mature markets such as the US.

A core driver of future competitiveness is the integration of AgTech and biotechnology, which are transforming Queensland's agriculture, fisheries and forestry sectors. The adoption of robotics, automation, protected cropping, autonomous systems and digital technologies is improving productivity, sustainability and supply chain efficiency while enabling scalable export growth.

The Queensland Government's target to grow primary industries output to $30 billion by 2030 is underpinned by strong investment in innovation, including the $30 million SSFIF. This creates a compelling platform for collaboration with US investors and technology partners.

Strategic engagement with the US will focus on integrating US' strengths in AgTech, robotics, synthetic biology and advanced data systems into Queensland's primary industries. This will enhance productivity, support climate resilience and unlock new export opportunities across emerging sectors such as biofuels, bioproducts and sustainable protein.

Queensland is well positioned to act as both a premium food supplier to the US and an innovation testbed for AgTech solutions, supported by strong industry linkages and growing engagement with US partners and investors.

With its scale, capability and innovation ecosystem, Queensland offers US partners a compelling value proposition, combining secure supply of premium agricultural products with advanced AgTech development, positioning the state as a trusted long-term partner in food security, sustainability and agricultural innovation.

29 Livestock data | Department of Primary Industries, Queensland

A. Brahman cattle, Queensland

B. Macadamia nuts, Bundaberg

C. Coral trout, Queensland

TIQ initiatives

1. **Expand premium food exports to the US** by supporting Queensland producers with targeted market intelligence, buyer introductions and in-market activation focused on high-value protein, horticulture and seafood segments.
2. **Position Queensland as a partner for AgTech collaboration, innovation and commercial partnerships** by connecting US firms, research institutions and industry bodies (including Western Growers Association and F3 Innovate) with Queensland's innovation ecosystem to facilitate pilot programs, knowledge exchange and technology adoption.
3. **Promote value-adding and new product development** by showcasing Queensland capabilities in regional processing, advanced manufacturing and emerging bio-industries (e.g. biofuels, nutraceuticals and alternative proteins).
4. **Attract and facilitate US investment into Queensland agribusiness and AgTech** by aligning opportunities with the SSFIF, leveraging global platforms such as Global AgInvesting, and connecting US institutional investors, venture capital and corporates with investment-ready projects across primary industries and innovation.

What success looks like in 2028

- **Sustained performance of Queensland food and agribusiness exports to the US,** maintaining strong market presence in premium beef, horticulture and seafood, supported by resilient supply chains and diversified customer relationships.
- **A strong and sustained pipeline of US investment into Queensland agribusiness and AgTech,** including ongoing engagement from institutional investors, venture capital and strategic corporates supporting sector transformation and innovation.
- **Increased number of joint ventures, pilot programs and research collaborations between Queensland and US partners,** accelerating technology adoption, commercialisation and capability development across primary industries.
- **Demonstrated adoption and commercialisation of AgTech solutions,** delivering measurable improvements in productivity, sustainability and supply chain efficiency, with Queensland recognised as a trusted partner for premium food and agricultural innovation in US–Asia-Pacific value chains.

Stacked Farm, Arundel

Life sciences and health innovation

The Queensland advantage

Queensland has a strong and mature biomedical ecosystem underpinned by internationally recognised scientific capabilities, world-class research infrastructure and a highly skilled workforce. The state's universities and medical research institutes deliver excellence across discovery research, translational science and commercialisation, supported by advanced facilities such as biobanks, genomics platforms and specialised laboratories. This capability is further strengthened by a statewide network of tertiary and quaternary hospitals, providing deep clinical expertise, real-world testing environments and direct pathways from research to patient care.

Queensland is an established and attractive destination for global pharmaceutical and medical technology companies seeking access to high-quality research, clinical expertise and Asia-Pacific markets. Leading firms including Sanofi, Stryker, Thermo Fisher Scientific, Cook Medical, Viatris and Baxter Healthcare have chosen to establish themselves in Queensland, reflecting confidence in the state's regulatory environment, talent base and collaborative innovation ecosystem. Their presence reinforces Queensland's credibility as a hub for advanced manufacturing, R&D and regional headquarters activity.

Queensland offers a comprehensive and globally connected clinical trials ecosystem, spanning early-phase through to late-stage trials across metropolitan, regional and remote settings. The state combines high-quality clinical governance with cost, speed and recruitment advantages, enabling efficient trial delivery for international sponsors. A diverse patient population across multiple climate zones supports research in areas such as infectious diseases, chronic conditions and tropical health, while growing biomanufacturing capability strengthens end-to-end development pathways from trials to production.

Queensland's life sciences success is driven by a strong culture of collaboration, bringing together government, academia, health services and industry. This collaborative model is embedded in major healthcare and innovation precincts including Herston, Boggo Road, the Gold Coast and the Sunshine Coast, where co-location enables rapid translation, shared infrastructure and industry engagement. This integrated ecosystem reduces barriers for international partners and accelerates commercial and clinical outcomes.

Queensland demonstrates global leadership in priority research areas including infectious diseases, neuroscience, oncology, tropical medicine, biosecurity and advanced health technologies. The state's expertise in tropical and infectious disease research is particularly distinctive, reflecting its geography and long-standing institutional capability. Queensland is also advancing innovation in defence and veteran health, digital health, medical devices and AI-enabled healthcare solutions, positioning the state as a trusted partner for addressing complex health, security and resilience challenges.

A. Dental implant, Herston Biofabrication Institute

B. The Spinal Cord Injury Liaison Service (SCILS), Gold Coast

TIQ initiatives

1. **Position Queensland as a trusted and strategic partner for US life sciences investment,** highlighting strengths in biotechnology, medtech, digital health and biomanufacturing, and Queensland's role as a launch-pad into Asia-Pacific healthcare markets.

2. **Advance Queensland's global profile at major US life sciences forums** (including BIO and J.P. Morgan Healthcare Week) to promote investment opportunities, showcase research and clinical capability, and facilitate strategic partnerships with US industry leaders.

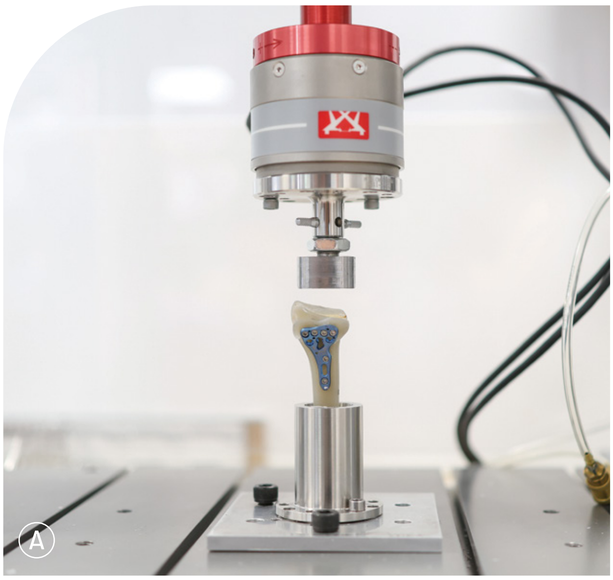
3. **Enable clinical trial and research collaboration with US sponsors,** leveraging Queensland's globally connected clinical trials network, quality and speed advantages, and recognised capabilities in areas aligned to US health and defence priorities.

What success looks like in 2028

A strong pipeline of US investment across biotechnology, medtech, digital health and biomanufacturing, with Queensland recognised as a trusted partner for strategic biomedical collaboration and Asia-Pacific market entry.

A measurable increase in US-sponsored clinical trials, research partnerships and translational projects conducted in Queensland, leveraging the state's globally connected trials network, speed and quality advantages.

Queensland firms have an established presence at major US life sciences forums, resulting in new commercial deals, licensing arrangements and long-term partnerships that strengthen the state's role in global health, defence health and biosecurity innovation.



Sports infrastructure

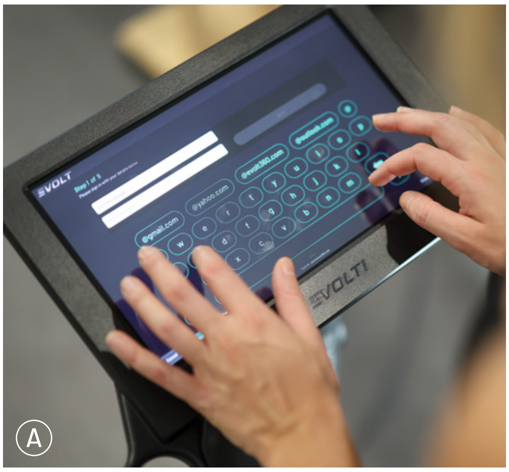
The Queensland advantage

Queensland offers US investors a unique entry point into Asia-Pacific's fast-growing sports economy, underpinned by world-class venues, elite teams across multiple sports, and a runway of infrastructure investment leading to the 2032 Olympic and Paralympic Games (2032 Olympics). The 2032 Olympics will be the most geographically dispersed Summer Games in history. Existing major facilities such as Suncorp Stadium, The Gabba, Cbus Super Stadium in Gold Coast and Queensland Country Bank Stadium in Townsville will be complemented by high-performance precincts and existing talent pathways through the Queensland Academy of Sport and leading universities, ensuring a steady pipeline of athletes, events and commercial opportunities across Queensland, with additional facilities to be built to ensure world-class events can occur throughout the 2032 Olympics and beyond.

Beyond sport, Queensland is emerging as a global hub for sports science, digital health and sports technology innovation, with strengths in AI-driven performance analytics, wearables, recovery science and fan-experience platforms. These capabilities, supported by deep research partnerships and a strong participation base, position Queensland as an ideal testbed for technologies and models that can scale back into the US and other international markets. For US companies, Queensland offers a thriving domestic market and a strategic bridge into the wider Asia-Pacific, creating opportunities for investment, innovation and global reach.

As host of the 2032 Olympics, Queensland is set to deliver an exceptional sporting event and build a lasting legacy that cements the state as the home of Australian sport, with significant opportunities for trade, investment, study, talent attraction and tourism well beyond the closing ceremony.

The US' world-leading expertise in event infrastructure, major sports operations and high-performance training can play a major role in the success of the 2032 Olympics. LA 2028 offers Queensland the chance to learn about sustainable venue design, transport planning, legacy planning, experience and event delivery. Partnerships with US corporates, investors and other stakeholders can support Queensland in raising investment capital, access advanced infrastructure solutions and create innovation hubs that strengthen Queensland's sports ecosystem, through the sportstech sector, healthtech, research collaborations and global business profile.



A. Evolt Health, Gold Coast

B. Runners, Brisbane

TIQ initiatives

1. **Position Queensland globally by leveraging the Olympic and Paralympic pathway** to drive trade, investment, tourism and innovation outcomes, including maximising the state's presence at LA28 (e.g. through Australia House).

2. **Attract targeted US investment** aligned with 2032 Olympics delivery and legacy priorities by engaging key investors and corporates and promoting Queensland's major infrastructure pipeline, sports ecosystem, sportstech innovation and broader commercial opportunities.

3. **Strengthen Queensland's trade and export pipeline into the US** by supporting businesses with targeted market intelligence, trade missions, business matching and opportunities linked to LA 2028 to expand their US presence.

4. **Support Tourism and Events Queensland (TEQ)** to attract high-value international business events across sport, digital health, sport science and technology to generate visitor economy benefits.

5. **Identify and progress aviation development opportunities** between Queensland and the US, leveraging the Connecting Queensland Fund to enhance connectivity, strengthen supply chains and unlock export growth.

What success looks like in 2028

Increased volume of qualified US investor and corporate leads, with investment commitments aligned to *2032 Delivery Plan* priorities, particularly infrastructure and precinct development.

Queensland companies successfully accessing LA 2028 supply chains and event opportunities, alongside measurable growth in exports of infrastructure solutions, sportstech and related technologies to the US.

Increased US visitation and high-value business event activity linked to the Olympic and Paralympic runway, reinforcing Queensland's international reputation and economic impact.

Brisbane, Queensland

Global network. Local expertise.

Your trade and investment partner - across Queensland and around the world

At TIQ, we don't just connect you to opportunity, we surround you with it. With a presence across 20 international markets, our global team brings deep local insight and direct access to Queensland's most dynamic sectors. Supported by eight regional offices across the state, we deliver seamless on-the-ground assistance to help your business grow wherever your ambitions take you.

TIQ is here to unlock Queensland's full trade and investment potential.

Start the conversation today:
Learn more here – tiq.qld.gov.au/contact

Queensland Government

TIQ TRADE + INVESTMENT QUEENSLAND

TIQ.QLD.GOV.AU