

Australia EPC (Engineering Procurement And Construction) Market Size Analysis Report - Market Share, Forecast Trends and Outlook (2025-2034)

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Report description:

Australia EPC (Engineering Procurement And Construction) Market Report Summary Description Value Base Year AUD billion 2024 Historical Period AUD billion 2018-2024 Forecast Period AUD billion 2025-2034 Market Size 2024 AUD billion 25.13 Market Size 2034 AUD billion 37.20 CAGR 2018-2024 Percentage XX% CAGR 2025-2034 Percentage 4.00% CAGR 2025-2034 - Market by Region Australian Capital Territory 4.5% CAGR 2025-2034 - Market by Region Western Australia 4.2% CAGR 2025-2034 - Market by Type Procurement 4.4% CAGR 2025-2034 - Market by Industry Vertical IT and Telecom 5.2% 2024 Market Share by Region Victoria 22.8% Australia EPC (Engineering, Procurement, and Construction) Market Trends Growth of the Australia EPC (engineering, procurement, and construction) market is underpinned by its ability to streamline project delivery through an integrated approach. By aligning engineering, procurement, and construction processes, it maintains quality across all stages, reduces the risk of delays and budget overruns, and delivers cost efficiencies via expert procurement and construction oversight. According to the Australian Bureau of Statistics, new residential construction rose by 19.4% to USD 7.14 billion in January 2024. This surge has significantly stimulated the market, supporting job creation, boosting economic activity, and attracting further investment. EPC firms in Australia are advancing market performance by adopting cutting-edge technologies and modern methodologies, which greatly improve project efficiency and impact. Australia EPC (engineering, procurement, and construction) market revenue. By offering comprehensive, end-to-end services, they streamline stakeholder communication and simplify project coordination. The sector benefits from a highly skilled workforce and ensures full compliance with local regulations and environmental standards, strengthening its reputation and operational effectiveness. Australia EPC (Engineering, Procurement, and Construction) Market Growth Safety remains a key focus in EPC projects, helping to reduce workplace incidents and enhance employee wellbeing, factors that are boosting demand for the Australia EPC (engineering, procurement, and construction) market. Sustainability is also at the forefront, with firms adopting green technologies to lessen environmental impact. Efficient procurement practices help optimise resource use, while EPC contractors increasingly deliver bespoke solutions, offering greater project flexibility. Rail freight plays a critical role, accounting for 49% of domestic movement, primarily iron ore and coal, which together make up 80%. To support this, the government has pledged USD 180.1 million to improve safety at regional rail crossings, with major initiatives such as Inland Rail aiming to strengthen and expand the nation's freight network. EPC

developments contribute significantly to local economic growth by generating employment across multiple industries, influencing the Australia EPC (engineering, procurement, and construction) market dynamics and trends. Domestic EPC companies are integrating global innovations and best practices into their operations, helping to modernise the sector. These projects are pivotal in upgrading infrastructure across key sectors such as energy, transport, and manufacturing, supporting long-term economic resilience and sustainability. Australia EPC (Engineering, Procurement, and Construction) Market Insights- The 12.4% increase in non-residential buildings, reaching USD 4.92 billion in January 2024, reflects significant growth in the sector, as per the Australian Bureau of Statistics, January 2024. This expansion boosts the EPC market, as it drives demand for complex infrastructure projects, providing opportunities for innovation, efficiency, and sustainable practices in building construction.- According to industry reports, Australia's building and construction sector, managing over USD 162 billion worth of projects annually, accounts for approximately 10% of GDP. This substantial contribution underscores the importance of EPC services in supporting economic growth, fostering job creation, and enhancing national infrastructure, vital for Australia's long-term.- In 2023-24, BITRE data highlighted that USD 33 billion was allocated to road and bridge construction, and USD 16 billion to railway infrastructure. Such investments fuel the EPC market, providing robust opportunities for contractors to deliver high-quality, large-scale infrastructure projects that meet national transport needs. Australia EPC (Engineering, Procurement, and Construction) Market Drivers Sustainable Construction Practices The EPC industry has increasingly embraced sustainable construction methods, such as incorporating recycled materials and energy-efficient designs, which impacts the Australia EPC (engineering, procurement, and construction) market revenue. This transition supports the country's ambitions to cut carbon emissions and reach net-zero targets. Innovations like modular and prefabricated construction are gaining momentum, cutting waste and boosting efficiency. In 2023/24, more than 1,000 developments achieved Green Star certification, highlighting the sector's shift towards sustainability. Government initiatives, international collaboration, and ongoing innovation have been central in advancing energy efficiency and reducing environmental impact. Digital Transformation in Construction The adoption of digital technologies, including Building Information Modelling (BIM), drones, and advanced project management software, is fuelling growth of the Australia EPC (engineering, procurement, and construction) market. These technologies improve transparency, shorten project timelines, and cut costs by allowing for precise planning and simulation. Artificial intelligence and machine learning are also enhancing project oversight and operational effectiveness. In April 2025, Cemex Ventures launched the third edition of Leaplab, an accelerator programme for start-ups focused on transforming construction through sustainability, productivity, and efficiency. Six firms took part, with prospects for strategic investment and commercial partnerships. Opportunities in the Australia EPC (Engineering, Procurement, and Construction) Market Opportunities in the Australia EPC (engineering, procurement, and construction) market have been strengthened by a renewed emphasis on Public-Private Partnerships (PPPs) to meet growing infrastructure demands. Sectors such as mass transit, renewable energy, and housing are increasingly relying on PPP models to attract private investment for public gain. In April 2025, VINCI, via its subsidiary Cobra IS, secured Australia's first electricity transmission PPP with the New South Wales Government. This 35-year contract covers the financing, design, construction, and maintenance of 240 km of high-voltage lines and eight substations, aiming to deliver 4.5 GW of capacity by 2028 while supporting renewable energy zones and generating 5,000 jobs. Market Restraints The Australia EPC (engineering, procurement, and construction) market faces several restraints, including a shortage of skilled labour, which delays projects and raises costs. Soaring material prices and inflation further strain budgets. Complex, multi-tiered regulations often cause approval delays, while securing funding remains difficult due to market uncertainty. Additionally, strict environmental compliance and sustainability standards demand costly adaptations, increasing both financial and operational challenges for EPC contractors. "Australia EPC (Engineering, Procurement, and Construction) Market Report and Forecast 2025-2034" offers a detailed analysis of the market based on the following segments: Market Breakup by Type- Engineering- Procurement- Construction Market Breakup by Industry Vertical- Power- Chemical- Oil and Gas- Manufacturing- IT and Telecom- Roads, Railways, and Bridges- Others Market Breakup by Region- New South Wales- Victoria- Queensland- Australian Capital Territory- Western Australia- Others CAGR 2025-2034 - Market by Industry Vertical IT and Telecom 5.2% Chemical 4.6% Roads, Railways, and Bridges 4.2% Power XX% Oil and Gas XX% Manufacturing XX% Australia EPC (Engineering, Procurement, and Construction) Market Share Market Analysis by Type According to the Australia EPC (engineering, procurement, and construction) market report, engineering plays a vital role in creating efficient and cost-effective solutions. It guarantees that projects are technically sound and comply with industry standards. Experienced engineers help optimise timelines, enhance safety, and address environmental concerns, leading to better

project outcomes and long-term sustainability. In January 2025, Dr Michael Mossman and Professor Donald McNeill launched an online survey as part of their research project, Indigenising the Built Environment in Australia. Funded by a USD 1.4 million ARC grant, it evaluated First Nations-focused criteria in the 2021 National Standard of Competency for Architects. Procurement is a key factor in both global and Australian EPC markets, focusing on acquiring high-quality materials and equipment at competitive prices. Effective procurement management ensures resources are delivered on time, cuts costs, and reduces supply chain risks. It also nurtures supplier relationships, supports innovation, and ensures compliance with regulatory and environmental standards. Construction represents the phase where plans come to life and the final product is realised, contributing significantly to the growth of the Australia EPC (engineering, procurement, and construction) market. This phase guarantees that projects are completed on time, within budget, and meet quality standards. Skilled construction management teams handle execution, safety, and resource coordination, ensuring efficient and reliable project delivery across various sectors. In November 2023, the MPavilion 10, created by Tadao Ando, was unveiled in Melbourne's Queen Victoria Gardens. This was Ando's debut project in Australia, showcasing a grand canopy, a reflecting pool, and artistic installations, all designed to offer a sensory and harmonious experience for visitors. Market Analysis by Industry Vertical According to Australia EPC (engineering, procurement, and construction) market analysis, the power sector thrives due to strong demand for renewable energy projects such as wind and solar farms. EPC firms contribute to large-scale infrastructure, facilitating efficient power generation and distribution. Technological advancements and government incentives encourage investment in clean energy, enhancing energy EPC (engineering, procurement, and construction) and supporting Australia's transition goals. In October 2024, Engie began constructing the 250MW Goorambat East solar farm in Victoria, Australia, marking its first solar project in the state. Expected to be operational by 2027, the farm will power households in Benalla and Wangaratta. The project will create 250 jobs and contribute to Victoria's renewable energy transition, supporting regional growth. In the chemical sector, the EPC market supports the construction of advanced processing plants and refineries. With the growing demand for petrochemical products, sustainable chemicals, and innovative production methods, EPC companies provide expert chemical engineering services, improving productivity, efficiency, and sustainability while meeting strict environmental standards. The oil and gas sector is driving growth of the Australia EPC (engineering, procurement, and construction) market, spurred by both offshore and onshore projects, including exploration and production facilities. Ongoing investments in LNG and petroleum developments, fuelled by global demand, offer substantial opportunities. EPC contractors deliver complete services, ensuring operational efficiency, cost control, and compliance with safety and environmental regulations. The manufacturing EPC market in Australia benefits from the increasing demand for sophisticated manufacturing facilities. EPC providers deliver integrated solutions, including factory and warehouse construction and automation systems, which enhance operational efficiency, minimise downtime, and support the growth of industries such as food processing, automotive, and heavy machinery, bolstering Australia's competitive position. In April 2025, Construction of the USD 100 million Translational Manufacturing Facility (TM@TRI) in Brisbane, Australia, is progressing, with the project expected to open in early 2026. The facility will be Australia's first on-demand cGMP cleanroom, supporting biotech and medtech companies, fostering local startups, and creating skilled jobs in the research and healthcare sectors. The IT and telecom sector is significantly impacting the Australia EPC (engineering, procurement, and construction) market revenue, benefiting from technological progress and the rising demand for data centres, fibre optic networks, and 5G infrastructure. EPC firms play a key role in providing specialised construction services that enable faster connectivity and enhance data storage, processing, and communication, driving the country's digital growth. In the roads, railways, and bridges sector, the Australian EPC market prospers due to large-scale public infrastructure projects aimed at improving transport networks. EPC companies are engaged in designing, building, and maintaining critical infrastructure, promoting economic growth, enhancing mobility, and strengthening regional connectivity, with government investment accelerating sector growth. In September 2024, Mammoet successfully installed a bridge in Melbourne's Narre Warren using an Accelerated Bridge Construction (ABC) method. This innovative approach minimised disruptions by fabricating the bridge off-site, then transporting and installing it with minimal road closures. The new rail bridge improved traffic flow and safety, supporting the Victorian Government's level crossing removal project. Australia EPC (Engineering, Procurement, and Construction) Market Regional Insights New South Wales EPC Market Overview New South Wales benefits from strong infrastructure investment and urban development, supporting EPC growth. Public-private partnerships and smart city initiatives enhance efficiency, driving demand for sustainable and large-scale construction projects. In 2021, warehouse construction accounted for 73% of all industrial building approvals in New South Wales, with a total value of USD 2.1 billion, as reported by the NSW Government. Queensland

EPC Market Trends Queensland's EPC market is fuelled by mining, renewable energy, and transport projects. Government incentives and regional development strategies boost growth, creating opportunities in energy infrastructure, housing, and industrial construction sectors. In the first quarter of 2024, detached house construction increased by 3.5%, according to data from the Housing Industry Association (HIA). Western Australia EPC Market Dynamics Western Australia's EPC market is driven by the resource and energy sectors. Its strategic export links, large-scale mining operations, and offshore projects attract significant investment, supporting complex engineering and construction services. In 2023, the state saw 40,293 new housing commencements, reflecting adaptations to market conditions, as reported by the Australian Bureau of Statistics (ABS).Competitive LandscapeThe Australia EPC (engineering, procurement, and construction) market key players feature leading companies known for delivering major infrastructure and building projects. These firms utilise cutting-edge digital engineering and contemporary construction methods across residential, commercial, civil, and industrial developments.Key Industry Players Laing O'Rourke Corp. Ltd.: Laing O'Rourke is a privately owned international engineering and construction company, established in 1978. Headquartered in Dartford, United Kingdom, it operates across Australia, the Middle East, and Europe. The company is renowned for delivering large-scale infrastructure and building projects using advanced digital engineering and modern construction techniques. Brookfield Corporation (Multiplex Constructions Pty Limited): Multiplex, a subsidiary of Brookfield Corporation, was founded in 1962 and is headquartered in Sydney, Australia. It specialises in high-rise and large-scale construction projects globally. Known for iconic developments, it has a strong presence in the UK, Middle East, and Asia-Pacific, delivering complex commercial, residential, and healthcare facilities. J Hutchinson Pty Ltd.: J Hutchinson Pty Ltd., trading as Hutchinson Builders, is one of Australia's largest privately owned construction companies. Founded in 1912 and headquartered in Queensland, Australia, it delivers a wide range of projects, including residential, commercial, civil, and industrial builds. The company is recognised for its strong client relationships and community focus. CIMIC Group Ltd. (CPB Contractors): CIMIC Group Ltd., established in 1949 and headquartered in North Sydney, Australia, is a leading infrastructure, construction, mining, and services company. Its construction arm, CPB Contractors, delivers major projects across Australia, New Zealand, and Asia. The group is part of the global Hochtief and ACS Group network, ensuring strong international capabilities.Other key players in the Australia EPC (engineering, procurement, and construction) industry report are Lendlease Corporation Limited, John Holland Group Pty Ltd., ADCO Constructions Pty Ltd., Hansen Yuncken Pty Ltd., and Aurecon Group Pty. Ltd., among others.Recent Developments April 2025 Green Steel of WA received full regulatory and statutory approval to begin construction of the Collie Steel Mill, Australia's first green steel facility. Backed by the WA Government, the project aimed to produce 450,000 tonnes of low-emission rebar annually, boosting regional jobs and enhancing local steelmaking capability. January 2025 Sojitz Corporation acquired Australia's Capella Capital and its investment platform from Lendlease, aiming to strengthen its infrastructure development capabilities. The acquisition supported Sojitz's strategic expansion in energy, transport, and social infrastructure, enhancing its presence in Australia's robust PPP market and reinforcing its integrated business model.

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