



Which State is Strongest for Tendering?

A data-driven comparison of tender activity, procurement intensity, ownership mix, project size, and category share across Australian state markets.

PERIOD

1 Jan 2026 – 30 Mar 2026

DATA SOURCE

E1 Tender & Project Data

MARKETS COVERED

VIC, NSW, QLD, WA, SA, TAS

1 Australian State Tender Market Snapshot

Activity is concentrated in the larger eastern states. Victoria leads on the core activity measures, recording both the highest tender volume and the highest tender intensity. State performance can't be explained by volume alone — this report examines public/private mix, budget distribution, and category share together.

Executive Scorecard

BEST OVERALL STATE FOR TENDERING

Victoria

LARGEST STATE BY PROJECT VOLUME

New South Wales

LEADING STATE BY TENDER VOLUME

Victoria

LEADING STATE BY TENDER INTENSITY

Victoria

STRONGEST PUBLIC TENDER VISIBILITY

Victoria

STRONGEST ALTERNATIVE MAJOR MARKET

Queensland

Headline Metrics

HIGHEST TENDER VOLUME

1,612

Victoria tenders in Q1 2026

LARGEST PROJECT BASE

1,137

New South Wales projects

HIGHEST TENDER INTENSITY

1.78

Victoria tenders per project

Bottom line: Victoria leads on tender volume and intensity. NSW and Queensland are the next largest markets but differ markedly in their public/private mix, project size, and category profile.

Source: E1 tender and project data, 1 January 2026 to 30 March 2026.

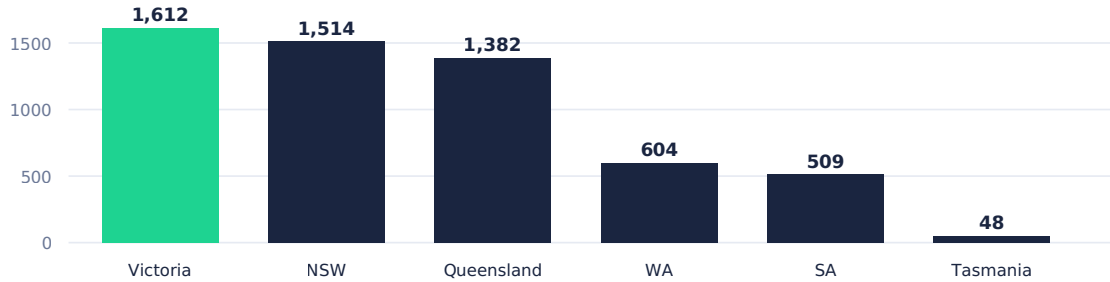
Methodology: This analysis reflects activity captured in E1 data and should be interpreted as an E1 market view. Projects are counted as unique project IDs; tenders at stage level. Territories are excluded. Public/private classification is determined by the head contractor at tender creation.

2 Comparing State Market Activity

Victoria is the strongest state market on the core activity measures, leading on both tender volume and tender intensity. Differences in tender intensity show that market strength is about more than size alone.

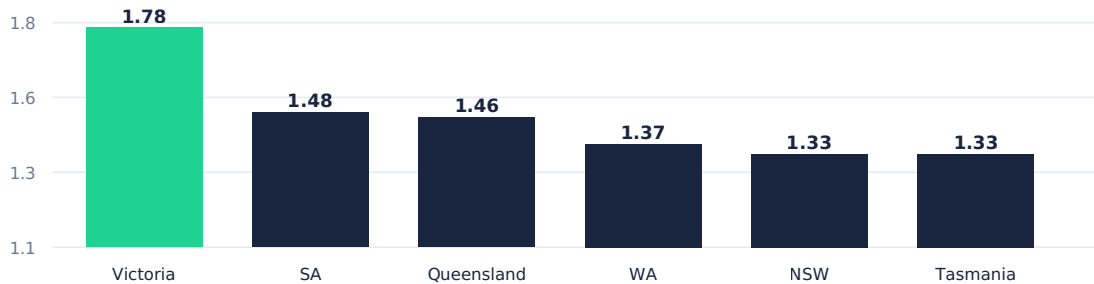
Total Tenders by State

Victoria recorded the highest number of tenders with 1,612, followed by NSW (1,514) and Queensland (1,382).



Tender Intensity by State

Victoria leads with 1.78 tenders per project — ahead of South Australia (1.48) and Queensland (1.46).



State Activity Summary

State	Projects	Tenders	Tenders per Project
Victoria	906	1,612	1.78
New South Wales	1,137	1,514	1.33
Queensland	948	1,382	1.46
Western Australia	440	604	1.37
South Australia	345	509	1.48
Tasmania	36	48	1.33

Bottom line: Victoria leads on both tender volume and intensity. Queensland ranks second; NSW has the largest project base but lower intensity and a larger private component.

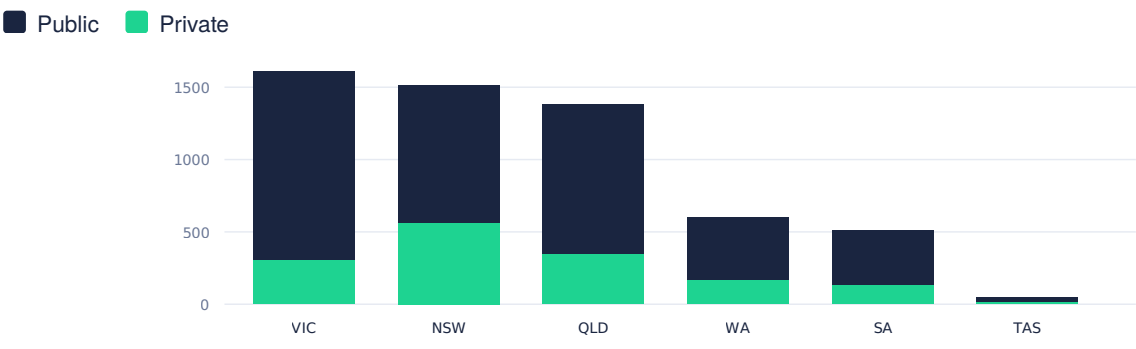
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Public and Private Tender Mix by State

Public tenders account for the majority of activity across all states. The public share is highest in Victoria at 81.2%, followed by Queensland (74.6%), South Australia (73.7%), and Western Australia (71.5%). Queensland records more public tenders overall than NSW — 1,031 vs 957.

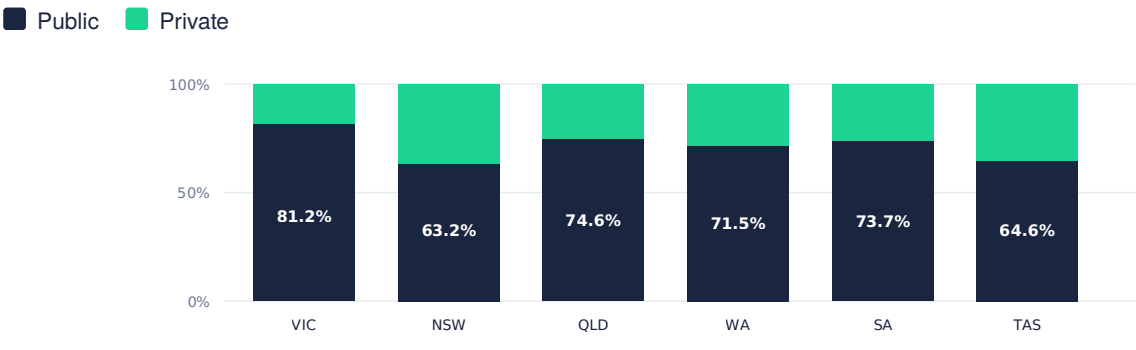
Public and Private Tender Volume by State

Victoria combines high tender volume with the strongest public weighting. Queensland records more public tenders than NSW overall. NSW has the largest private component.



Public Share of Tenders by State (100% view)

Victoria is the most public-weighted at 81.2%; New South Wales the most privately weighted at 36.8% private.



Bottom line: Victoria leads on public share at 81.2%. Queensland records more public tenders than NSW overall — 1,031 vs 957 — despite NSW being the larger market by project base.

4 Project Size by State

The 1m to 5m band is the largest across Victoria, NSW, and Queensland — indicating a deep mid-market pipeline. South Australia and Western Australia are more heavily weighted toward projects under 1m.

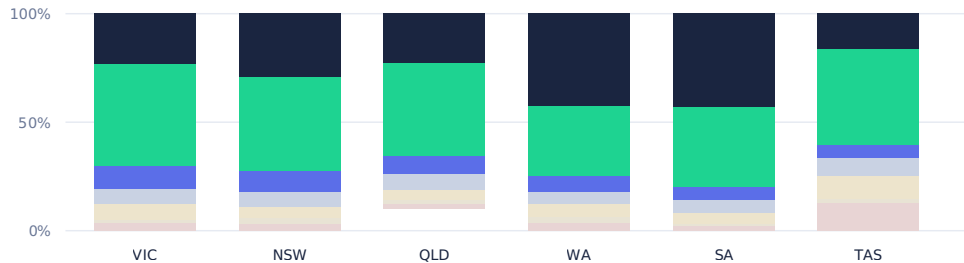
Project Size Mix by State (%)

State	<1m	1m–5m	5m–10m	10m–20m	20m–50m	50m–100m	>100m
Victoria	23.3%	47.3%	10.2%	7.1%	7.0%	1.8%	3.4%
New South Wales	29.2%	43.5%	9.5%	6.9%	4.9%	3.1%	3.0%
Queensland	22.8%	43.0%	8.2%	7.5%	4.3%	2.1%	2.3%
Western Australia	42.9%	31.8%	7.6%	5.5%	5.8%	3.0%	3.5%
South Australia	43.0%	37.1%	5.7%	5.9%	5.5%	0.6%	2.2%
Tasmania	16.7%	43.8%	6.2%	8.3%	10.4%	2.1%	12.5%

Project Size Mix by State — Stacked View

Eastern states show a deeper mid-market pipeline. SA and WA are more concentrated in smaller value work.

■ <1m
 ■ 1m–5m
 ■ 5m–10m
 ■ 10m–20m
 ■ 20m–50m
 ■ 50m–100m
 ■ >100m



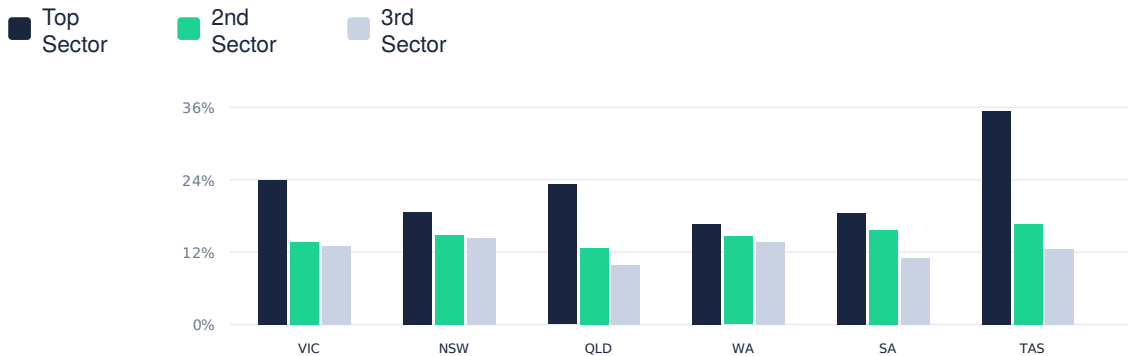
Bottom line: The 1m–5m band dominates the eastern states, pointing to a deep mid-market pipeline. SA and WA skew smaller with most projects under 1m.

5 Category Share by State

State performance is shaped not only by total activity, but also by the categories that make up that activity. Victoria and Queensland are weighted toward Education. New South Wales is led by Commercial activity. Western Australia stands out for its stronger Government and Refurbishment profile.

Top 3 Sector Share by State

Clear differences emerge in sector mix. Victoria and Queensland lead on Education; NSW and SA on Commercial; WA on Government.



Sector Mix by State — Top 3

State	Top Sector	Share	Second Sector	Share	Third Sector	Share
Victoria	Education	23.9%	Commercial	13.6%	Government	13.0%
New South Wales	Commercial	18.6%	Government	14.8%	Education	14.3%
Queensland	Education	23.2%	Commercial	12.7%	Government	9.8%
Western Australia	Government	16.6%	Commercial	14.6%	Refurbishment	13.6%
South Australia	Commercial	18.5%	Education	15.7%	Government	11.0%
Tasmania	Commercial	35.4%	Retail	16.7%	Fit-out	12.5%

Bottom line: Victoria and Queensland lead on Education; NSW and SA on Commercial; WA on Government and Refurbishment — each state has a distinct demand profile.

6

Which State is Best for Tendering?

Victoria emerges as the leading state market for tendering in the current reporting period. It leads on the core activity measures — highest tender volume, highest tender intensity, and strongest public visibility — while maintaining a strong mid-market project profile and a sector mix led by Education.

New South Wales remains a major market by project base and total activity, but its lower tender intensity and lower public weighting mean it doesn't perform as strongly on a tender-focused view. Queensland ranks as the strongest alternative major market, combining high tender volume, strong intensity, and more public tenders overall than NSW.

South Australia and Western Australia remain smaller markets, although both show useful structural strengths. Tasmania is a much smaller market and should be interpreted more cautiously.

Final State Ranking

State	Tender Volume	Project Volume	Tender Intensity	Public Share	Overall
Victoria	1	3	1	1	1
Queensland	3	2	3	2	2
New South Wales	2	1	5	6	3
South Australia	5	5	2	3	4
Western Australia	4	4	4	4	5
Tasmania	6	6	6	5	6

What Each State is Strongest For

★ OVERALL WINNER

Victoria

Strongest overall state for tendering — leads on tender volume, intensity, and public visibility.

New South Wales

Largest state by project volume. Deep project base with a larger private component.

Queensland

Strongest alternative major market. High public tender count and solid tender intensity.

South Australia

Smaller market with strong tender intensity. Distinct project size and category profile.

Western Australia

Smaller market with a stronger Government and Refurbishment profile.

Tasmania

Niche market with lower overall scale. Results should be interpreted with caution.

FINAL TAKEAWAY

- **Victoria is the strongest all-round state for tendering in the current E1 dataset.** While New South Wales offers the largest project base and Queensland remains the strongest alternative major market, Victoria provides the strongest overall balance of tender volume, procurement intensity, public visibility, and market depth.