

Cordell Construction Monthly

AUSTRALIA | SEPTEMBER 2026



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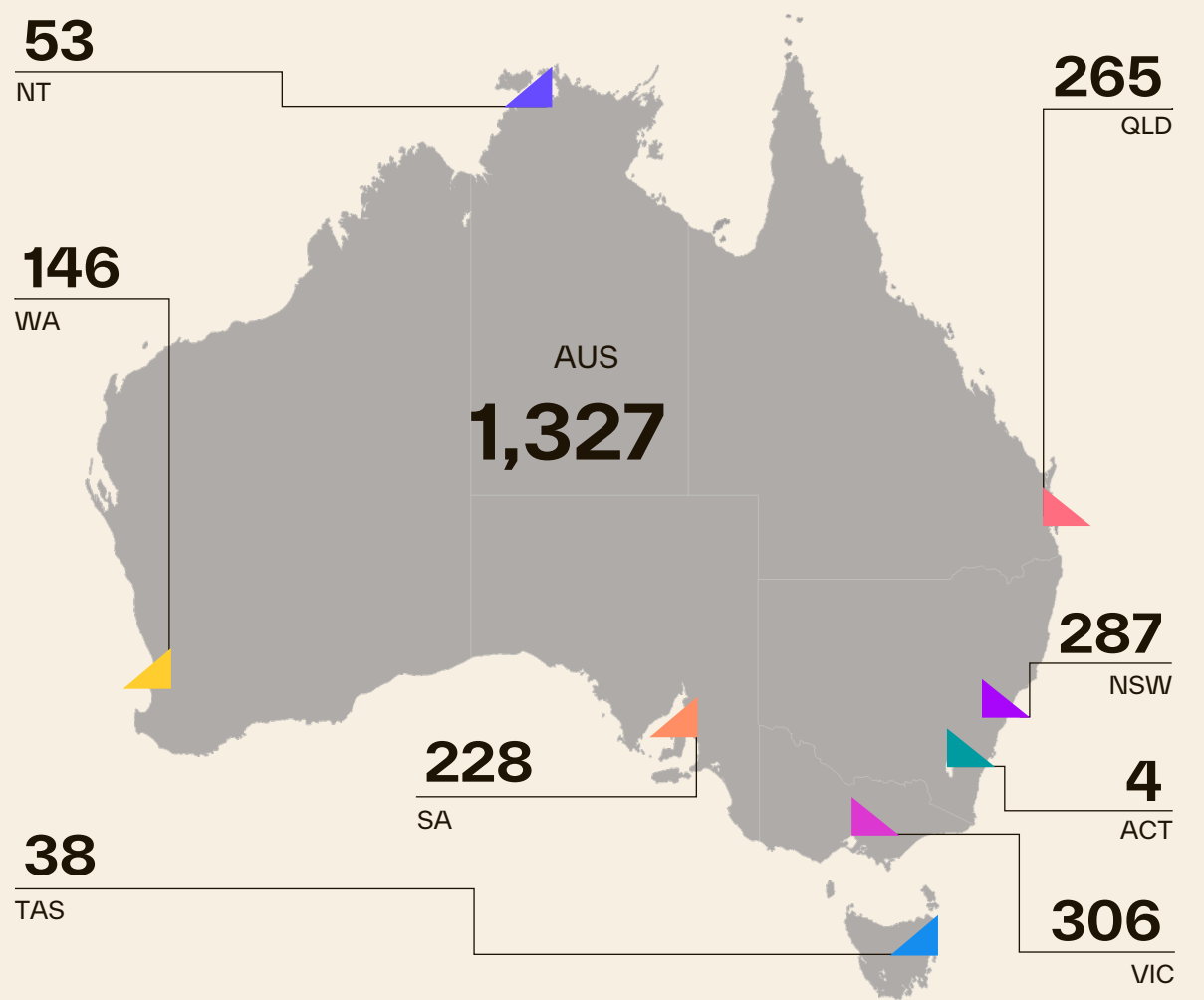
Pipeline – Australia

There were 1,327 new projects identified by Cordell nationally in August, down 3.7% month-on-month. The number of new projects identified nationally over the past three months was up 11.3% on the previous three-month period, while the number of new projects seen over the past 12 months was 1.7% higher compared with the 12 months to August 2025.

Over the past 12 months, the number of new projects identified by Cordell increased by 13.8% in Queensland, 13.1% in the Northern Territory, 6.5% in South Australia, 4.8% in Western Australia and 0.4% in Tasmania when compared with the previous 12-month period. On the other hand, the ACT (-12.8%), Victoria (-6.6%) and New South Wales (-3.5%) recorded a decline in new projects over the same period.

Apartments & units (19.2%) and civil engineering (7.4%) were the only sectors to see an increase in the number of new projects identified by Cordell over the year to August 2026.

Number of projects



Median Project Value

CIVIL ENGINEERING	COMMERCIAL	COMMUNITY	APPARTMENTS & UNITS	INDUSTRIAL	MINING
\$1,500,000	\$1,500,000	\$1,500,000	\$2,000,000	\$2,000,000	\$5,500,000

Pipeline – By state

Share of Project Numbers by Category

	# of projects	Civil engineering	Commercial	Community	Apartments & units	Industrial	Mining
NSW	287	27.2%	10.1%	22.6%	25.1%	14.6%	0.3%
VIC	306	45.4%	4.6%	15.0%	22.2%	12.4%	0.3%
QLD	265	38.5%	7.2%	19.6%	17.7%	14.7%	2.3%
SA	228	13.2%	3.9%	7.5%	64.5%	11.0%	0.0%
WA	146	34.2%	4.8%	42.5%	12.3%	3.4%	2.7%
TAS	38	44.7%	5.3%	21.1%	18.4%	10.5%	0.0%
ACT	4	50.0%	0.0%	25.0%	0.0%	25.0%	0.0%
NT	53	32.1%	9.4%	15.1%	11.3%	9.4%	22.6%
AUS	1,327	32.8%	6.4%	19.5%	27.5%	12.0%	1.8%

Share of Project Values by Category

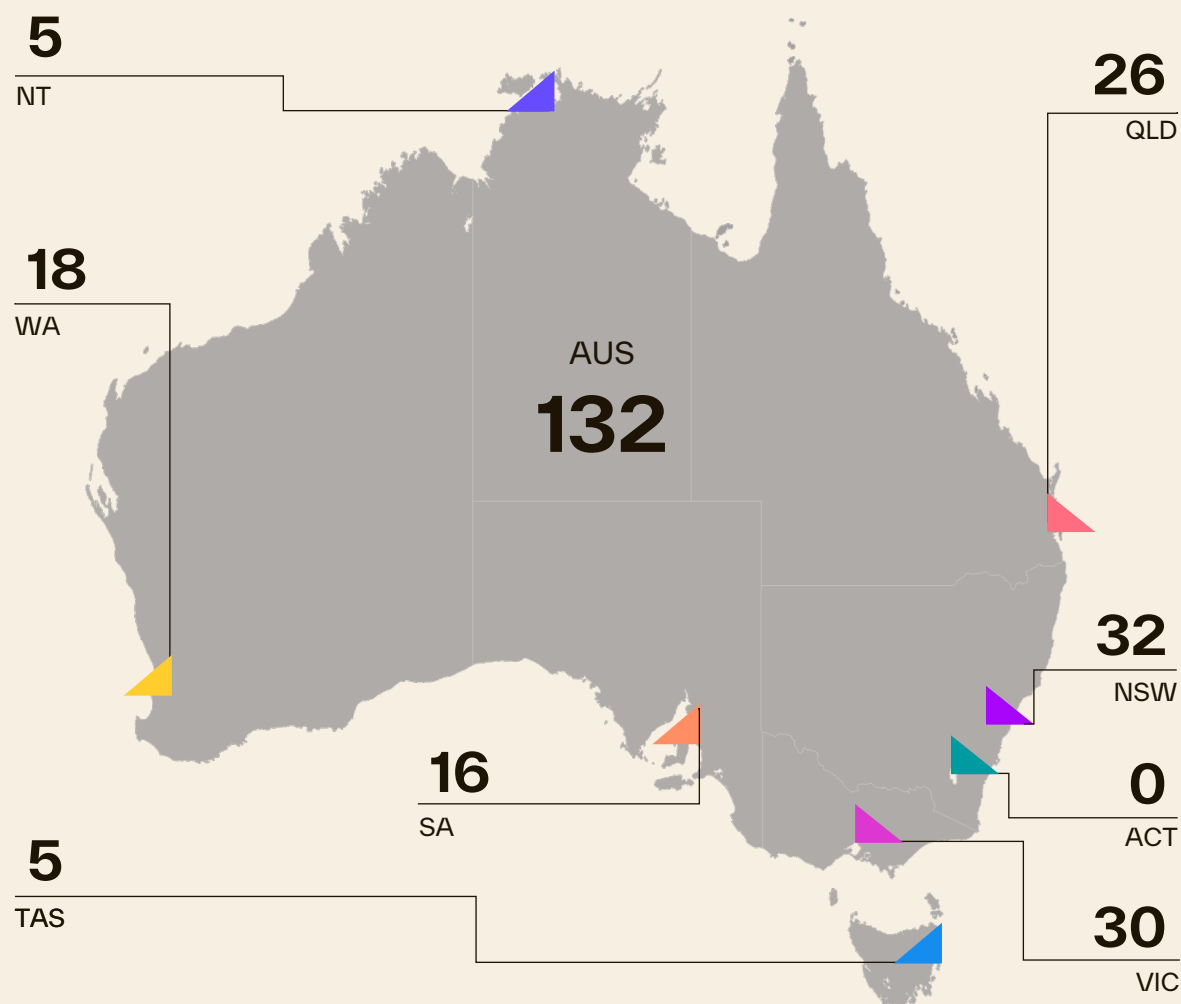
	Estimated value of projects	Civil engineering	Commercial	Community	Apartments & units	Industrial	Mining
NSW	\$10.4 billion	18.0%	38.7%	2.0%	35.3%	5.7%	0.1%
VIC	\$1.4 billion	64.9%	2.6%	15.1%	10.9%	6.4%	0.1%
QLD	\$5.2 billion	16.0%	2.4%	57.9%	18.0%	3.6%	2.1%
SA	\$624 million	8.5%	1.2%	8.6%	75.6%	6.0%	0.0%
WA	\$467 million	22.5%	2.0%	29.4%	19.1%	8.0%	18.9%
TAS	\$202 million	15.0%	15.9%	54.0%	12.4%	2.7%	0.0%
ACT	\$13 million	39.8%	0.0%	37.2%	0.0%	23.0%	0.0%
NT	\$359 million	32.0%	9.9%	4.4%	11.7%	2.6%	39.3%
AUS	\$18.6 billion	21.0%	22.9%	20.2%	28.9%	5.2%	1.9%

Moving into construction – Australia

Nationally, 132 projects moved into the construction phase in August, down from 184 in July. The number of projects moving into construction over the past three months was 9.4% higher than in the previous three-month period, however the number of projects moving into construction over the 12 months to August was 12.1% lower than in the previous 12-month period.

Apartments & Units (5.5%) was the only sector to record an increase in the number of projects moving into construction over the 12 months to August 2026, with all other sectors recording a decline when compared with the previous 12-month period.

Number of projects



Median Project Value

CIVIL ENGINEERING	COMMERCIAL	COMMUNITY	APARTMENTS & UNITS	INDUSTRIAL	MINING
\$12,000,000	\$4,500,000	\$3,500,000	\$4,000,000	\$5,400,000	n.a.

Moving into construction – By state

Share of Project Numbers by Category

	# of projects	Civil engineering	Commercial	Community	Apartments & units	Industrial	Mining
NSW	32	28.1%	15.6%	37.5%	9.4%	6.3%	3.1%
VIC	30	10.0%	10.0%	56.7%	13.3%	10.0%	0.0%
QLD	26	7.7%	11.5%	23.1%	38.5%	19.2%	0.0%
SA	16	0.0%	0.0%	25.0%	68.8%	6.3%	0.0%
WA	18	11.1%	11.1%	27.8%	38.9%	11.1%	0.0%
TAS	5	0.0%	40.0%	20.0%	40.0%	0.0%	0.0%
ACT	0	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
NT	5	20.0%	20.0%	20.0%	40.0%	0.0%	0.0%
AUS	132	12.9%	12.1%	34.8%	29.5%	9.8%	0.8%

Share of Project Values by Category

	Estimated value of projects	Civil engineering	Commercial	Community	Apartments & units	Industrial	Mining
NSW	\$398 million	47.6%	5.0%	21.3%	16.2%	7.8%	2.0%
VIC	\$239 million	12.2%	12.5%	33.0%	25.0%	17.3%	0.0%
QLD	\$915 million	0.9%	1.1%	5.0%	68.7%	24.3%	0.0%
SA	\$139 million	0.0%	0.0%	57.3%	40.9%	1.8%	0.0%
WA	\$704 million	65.5%	15.4%	10.1%	7.6%	1.3%	0.0%
TAS	\$50 million	0.0%	60.3%	30.7%	9.0%	0.0%	0.0%
ACT	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
NT	\$27 million	27.8%	20.1%	16.9%	35.2%	0.0%	0.0%
AUS	\$2.5 billion	28.1%	8.2%	15.4%	35.5%	12.4%	0.3%

NSW

The largest project announced this month is the \$3.5 billion NEXTDC S4 Data Centre Phase 2 development at Horsley Park. Currently at the Sketch Plans stage, the proposal comprises a major expansion across multiple stages to increase hyperscale data infrastructure capacity within Western Sydney. NEXTDC is leading the development, with HDR engaged as architect. The project represents one of the most significant digital infrastructure investments in Australia and reflects strong demand for large-scale cloud and data storage facilities.

A major \$765 million mixed-use development has been identified for Leppington. Currently in the early planning stages, the project is expected to deliver a substantial combination of residential and supporting urban infrastructure. Tony Owen Partners is associated with the development. The proposal aligns with continued growth across Sydney's south-west and is expected to contribute significantly to future housing supply.

The \$650 million Mixed Use Development at Five Dock is progressing through early planning. The proposal will provide a major mixed-use precinct comprising residential development and associated urban infrastructure. Muir Burnside Group is leading the development with Terroir Pty Ltd engaged as architect. The project reflects the ongoing transformation of the Parramatta Road corridor into a high-density urban precinct.

Development applications continue to progress for the \$445.6 million Uniting Gordon Seniors Housing project in Gordon. The project will deliver a substantial senior living and aged care accommodation community aimed at meeting increasing demand for specialised housing options. Uniting is leading the development, with Architectus Sydney appointed as architect. The proposal represents a major investment in social and seniors housing infrastructure across Sydney's north shore.

A design and construct procurement process is underway for the \$400 million Windsor Road – Rouse Hill Roadworks Upgrade project. The project will deliver significant transport infrastructure improvements to increase capacity and improve traffic flow within Sydney's rapidly growing north-west. Transport NSW is overseeing project delivery and procurement. The road upgrade forms a critical component of regional growth infrastructure supporting new housing and employment areas.

VIC

The \$65 million Victoria Regions Kindergartens on School Sites Bundle program is progressing at the Sketch Plans stage across regional Victoria, with activity centred around Neerim South. The project will deliver new kindergarten facilities integrated within existing school sites, providing modern early learning environments and supporting growing enrolments across regional communities.

A second major education initiative, the \$39 million Victoria Region Kinder Delivery Bundle - 2028, is also advancing through the Sketch Plans stage. The program will deliver new kindergarten facilities across multiple Victorian locations, helping to expand capacity and support government commitments to early years education. The Department of Education and Training is managing the project as part of its statewide infrastructure pipeline. Together with other kindergarten delivery packages, the project represents a significant commitment to community and educational infrastructure.

Open tenders have been released for the \$30 million Leakes Road Roadworks Duplication project in Tarneit. The works will provide road duplication and associated transport upgrades designed to improve traffic flows and network capacity within one of Melbourne's fastest-growing municipalities. Wyndham City Council is leading the project and progressing procurement through a firm tender process.

Consultancy tenders have been called for the \$30 million Baw Baw Cultural Connection Precinct project in Warragul. The project will establish a significant cultural and community precinct designed to provide gathering, education and community facilities for the region. Baw Baw Shire Council is leading the development and is currently seeking superintendent representative services to support project delivery. The precinct is expected to become an important cultural asset and community hub for the region.

Planning continues for the \$30 million East Werribee Precinct project with consultancy procurement underway for landscape architectural services. The project forms part of the broader transformation of the East Werribee employment and innovation precinct, incorporating substantial landscape and public realm works. Development Victoria is overseeing the initiative and progressing planning activities. The development will contribute to the long-term creation of a major employment and innovation destination in Melbourne's west.

QLD

The \$1.3 billion Arthur Gorrie Correctional Centre Capacity Uplift Project at Wacol is currently at the Sketch Plans stage and represents Queensland's largest project announcement this month. The development will increase correctional facility capacity through major infrastructure upgrades and expansion works. BESIX Watpac is leading the project. The proposal forms part of broader investment in justice infrastructure and correctional services capacity across the state.

The \$900 million Beachside Yaroomba project continues to progress following development approval. The proposal will deliver a major resort and tourism precinct designed to strengthen the Sunshine Coast visitor economy. Dennis Family Corporation is leading the development, with Cottee Parker engaged as architect. The project remains one of the state's most significant tourism developments.

A major expansion of correctional infrastructure is underway through the \$730 million Townsville Correctional Centre Capacity Uplift Project at Stuart. The project has reached the contract award stage and will deliver increased correctional accommodation and supporting infrastructure. Queensland Corrective Services and Building & Asset Services are overseeing delivery. The development forms part of Queensland's long-term investment in justice infrastructure.

Development continues on the \$350 million PA Health Connect Woolloongabba Hospitals & Health Care Services Stages. The proposal will provide significant healthcare infrastructure expansion and associated service upgrades. Barwon Investment Partners is leading the development with BVN engaged as architect. The project supports continued investment in major health facilities servicing the Brisbane metropolitan region.

Expressions of interest have been invited for the \$250 million Hinterland Nerang Precinct Redevelopment. The project will establish a major community and civic precinct designed to support future growth and service requirements within the Gold Coast region. Invest Gold Coast is leading procurement and development planning. The project is expected to provide a catalyst for broader urban renewal and community infrastructure investment.

WA

Long-term planning continues for the \$156 million Karnup Station Precinct project, with the proposal currently at the Sketch Plans stage. The development is expected to establish a major transport and station precinct supporting future residential and employment growth within Perth's southern corridor. The project forms part of broader transport infrastructure investment across metropolitan Perth. Its delivery will improve connectivity and support planned urban expansion in the region.

Open tenders have been released for the \$35 million Library, Museum and Arts Centre project in Booragoon. The development will provide a major community, cultural and civic facility incorporating library, museum and arts functions. City of Melville is leading the project with Christou Design Group engaged as architect. The project will become a significant cultural destination and community asset for the municipality.

The \$30 million Warehouse & Office project in Doobarda is progressing through Development Application. The proposal will deliver industrial warehouse and office facilities designed to support future business and logistics activity. Fife Capital is managing the development while JMA Architects has been appointed as architect. The project strengthens the industrial development pipeline within Perth's south-east corridor.

An \$18 million mixed-use development has been proposed for Ellenbrook. The project will deliver residential development integrated with supporting mixed-use elements designed to enhance the town centre environment. Space Collective Architects is associated with the development. The proposal contributes to the ongoing evolution of Ellenbrook as a major metropolitan centre.

SA

The Bond Southwark, an \$80 million mixed-use development on the site of the former West End brewery, is the largest South Australian project updated this month. The proposal is progressing through Development Application. Samaras Construction & Developments is leading the project. The development continues the transformation of Adelaide's inner western suburbs through higher-density housing and urban renewal investment.

A \$50 million apartment and row dwelling project is advancing in Adelaide. The proposal will provide a significant residential development supporting increased inner-city housing supply. Studio Nine Architects is engaged for design services. The development contributes to Adelaide's ongoing residential intensification strategy.

Plans have been submitted for a \$30 million apartment project in North Adelaide. The proposal will deliver a substantial apartment development within one of Adelaide's most established residential precincts. Carr Design Group is leading the development. The project reflects continued demand for higher-density living opportunities close to the CBD.

The \$19 million Norwood Medical Precinct Stages are progressing through development application. The development will establish a new healthcare precinct incorporating modern medical facilities and associated infrastructure. Leyton Property is leading the project, with Chessman Architects engaged on the design. The proposal will strengthen healthcare service provision within Adelaide's eastern suburbs.

TAS

The largest Tasmanian project announced this month is the \$100 million Tasmanian Youth Justice Facility at Pontville. Open tenders have been released for the project, which will provide a purpose-built youth justice facility to replace ageing infrastructure and improve service delivery outcomes. Department for Education, Children and Young People is leading the development.

Consultancy tenders are progressing for the \$34 million Halls Saddle Visitor Hub project in Ridgeway. The proposal will establish a major visitor destination with supporting tourism and community infrastructure. City of Hobart is overseeing project planning and approvals. The development is expected to strengthen tourism opportunities and enhance visitor experiences in the region.

A \$31.3 million Data Centre has been proposed in Wesley Vale. The project is progressing through Development Application and will deliver significant digital infrastructure capacity for the state. Firmus Technologies is leading the development, with HDR

engaged as architect. The proposal highlights Tasmania's growing role in supporting technology and digital infrastructure investment.

The \$16.5 million Deloraine High School Major Redevelopment is moving forward with architectural consultancy procurement underway. The project will deliver major upgrades to education infrastructure and enhance learning environments at the school. Department for Education, Children and Young People is managing the development process. The investment supports ongoing improvement of educational facilities across regional Tasmania.

NT

The \$30 million Pirlangimpi Road Unsealed Roadworks Upgrade & Sealing project on Melville Island has reached the tenders called stage. The works will upgrade and seal critical transport infrastructure connecting communities throughout the Tiwi Islands. Department of Infrastructure, Planning & Logistics is leading procurement and delivery. The project will improve accessibility, resilience and connectivity for local communities.

The \$25 million St Marys Social Housing Redevelopment project in Alice Springs is progressing through a design and construct procurement process. The development will provide new social housing accommodation designed to address housing needs within the region. The project forms part of broader investment in community housing and social infrastructure across the Northern Territory. It is expected to deliver important housing outcomes for residents.

ACT

Consultancy procurement is underway for the \$62 million Canberra New National Convention & Entertainment Centre. The project will establish a major convention and entertainment facility designed to support business events, tourism and cultural activities within the national capital. The ACT Chief Ministers Department is leading development planning. Once delivered, the project is expected to become a landmark destination and a major contributor to Canberra's visitor economy.

Mining

Early-stage exploration activities are advancing through the \$75 million Dante Polymetallic Project in Ngaanyatjarra, Western Australia. The project is progressing through exploration, drilling and assessment activities aimed at evaluating the viability of polymetallic mineral resources within the project area. Terra Metals is leading development of the project and continues to progress investigation works. The proposal highlights ongoing exploration investment across Western Australia's minerals sector and contributes to the state's resource development pipeline.

The \$50 million Cannington Base Metals Project in Cloncurry, Queensland, is progressing through exploration and drilling activities. AIC Mines is managing the project as part of its ongoing resource assessment program. The works focus on evaluating and expanding base metal resources through targeted drilling and geological investigations. The project reflects continued investment in Queensland's minerals sector and supports long-term resource development opportunities within the north-west region.

Registrations have been invited for the \$50 million Arrow Energy CSG-LNG Surat Basin Gas Project – Supply of Casing and Tubing (OCTG) and Associated Services at Dalby, Queensland. The procurement package forms part of Arrow Energy's ongoing coal seam gas and LNG operations within the Surat Basin and seeks suppliers capable of supporting future field development activities. Arrow Energy is leading the procurement process. The package represents a significant component of the infrastructure and equipment supply chain required to support continued gas production in one of Australia's major energy regions.



Definitions

Pipeline: Reports the flow of new projects identified by Cordell within the data month. The new project pipeline monitors projects that have been flagged with the following status; early, firm, no further information, possible and registrations. The New Project category does not include projects that were both identified and commenced, deferred or abandoned within the same month and excludes projects with an estimated construction value of less than \$300,000.

Moving into Construction: Reports the volume and value of projects identified within the last 24 months, where the project stage has been updated to "construction" within the data month. Actual construction commencement dates may vary. Projects with an estimated construction value of less than \$2,000,000 have been excluded.

Data Disclaimer

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Aggregate value estimates and median project values are based on raw data from the Cordell Connect database. Data from Cordell Connect includes project values as advised by the project managers, or are estimates provided by Cordell researchers.

Everyone is talking about Big Data

Big Data is fundamentally changing the way builders, developers and professionals involved in commercial real estate go about their jobs. Detailed real time data collection is providing the industry with more accurate and efficient tools to understand the best performing potential markets, analyse the best types of products to build with, identify leads and new sales opportunities and to quickly estimate and quote.

Cotality is the provider of Australia and New Zealand's most comprehensive residential and commercial property data. Our acquisition of Cordell in 2015 means we are also now proud to be able to provide the most extensive construction data available.

Collectively, our data covers more than 4 billion decision points across residential, commercial, building and construction costing, collected from more than 660 sources. This includes the real estate industry, all levels of government, data partners, media and our own team of researchers creating analytics and insights that fuel decisions from first home buyers right through to federal government.

Big Data that does not tell a story or provide you with actionable insights is just a pile of numbers. At Cotality, we pride ourselves on our tools and analytics that help our clients understand their markets, improve their workflows, save time, make money and make better decisions. We'd love to work with you, too.

6 Ways Big Data Can Help You Succeed



Identify new opportunities

Be alerted to zoning changes and see detailed zoning information with Blockbrief.



Identify properties to purchase

Look up properties – both on and off the market – that are suitable for development and understand their value with RP Data Professional.



Identify pricing and future sweet spots

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See what is planned, out to tender and under construction in detail together with contact details of developers and key contractors with Cordell Projects.



Understand your CBD

See the shape of the market, when leases are coming up and recent sales in commercial property with Cityscope and Lease Expiry Diary.



Produce accurate quotes and estimates

Use building data to reduce the risk of over or under quoting, and produce quotes faster with Cordell Costings.

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