

FY26 Q4 · ROAD AND CIVIL INFRASTRUCTURE

Queensland roads: the mid-size market.

Who won Department of Transport and Main Roads (TMR) road and civil contracts in the first half of 2026, how packages are sized, and what TMR and councils are tendering next.

\$3.56m

median TMR road and civil contract,
January to May 2026

52

awards published, worth \$344m
(incl. GST)

69%

of contracts sit between \$1m and
\$20m

THE QUARTER IN BRIEF

Queensland's road market is built from mid-size packages.

FY26 Q4 (April to June 2026) produced 16 published TMR road and civil awards worth \$108m by the end of May, against 36 awards and \$236m in Q3. June notices are not yet published, so Q4 will grow.

16

Q4 awards published to date
(36 in Q3)

\$108m

Q4 disclosed value incl. GST
(Q3: \$236m)

\$4.61m

Q4 median contract, up from
\$3.09m in Q3

\$344m

Jan to May 2026 total across 52
awards

01 · PACKAGE SIZE

A typical TMR contract is \$3.56m.

Only 25% of awards are under \$1m. 36 of 52 sit between \$1m and \$20m, the natural territory of regional civil contractors.

02 · THE PLAYS

Asphalt majors go big. Regional civils go often.

Colas, Boral, Fulton Hogan and Hazell Bros average \$12m to \$19m per award. Durack, Doval and Downer each won five awards averaging \$6m to \$7m.

03 · RECOVERY WORK

Disaster recovery is a market of its own.

10 DRFA restoration awards were worth \$59.8m. In the South West, most went by sole invitation to councils and RoadTek.

04 · NEXT QUARTER

2027 road maintenance contracts are in play.

TMR is tendering 2027 Road Asset Management Contracts for Metropolitan and South Coast regions, while 8 council DRFA packages opened in Jul to Sep.

Prequalification is the gate.

Most TMR tenders are open only to contractors prequalified at a set roadworks (R), asphalt (A) and financial (F) level. The level you hold decides which lane you can play in before price is considered.



Source: Tendor market data, QLD Government (TMR via QTenders/QBuild eTender) award notices published 1 Jan to 31 May 2026 (latest available). Values are disclosed contract values including GST, not quarterly expenditure.

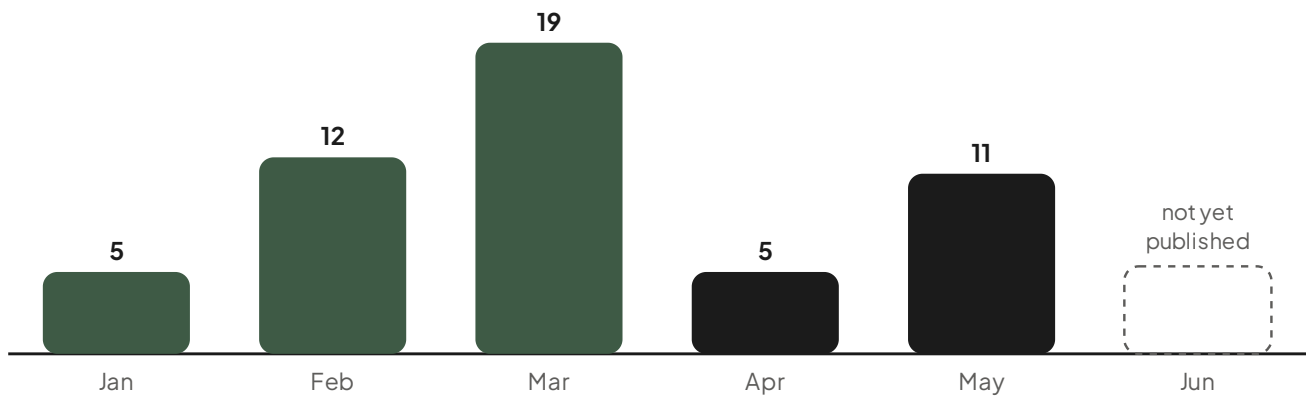
JANUARY TO JUNE 2026 MONTH BY MONTH

March was the peak. Q4 is still filling in.

TMR road and civil awards built through the first quarter of 2026 and peaked in March, driven by the \$94.8m Bruce Highway pavement rehabilitation package. April and May have been quieter so far, and June notices are not yet published.

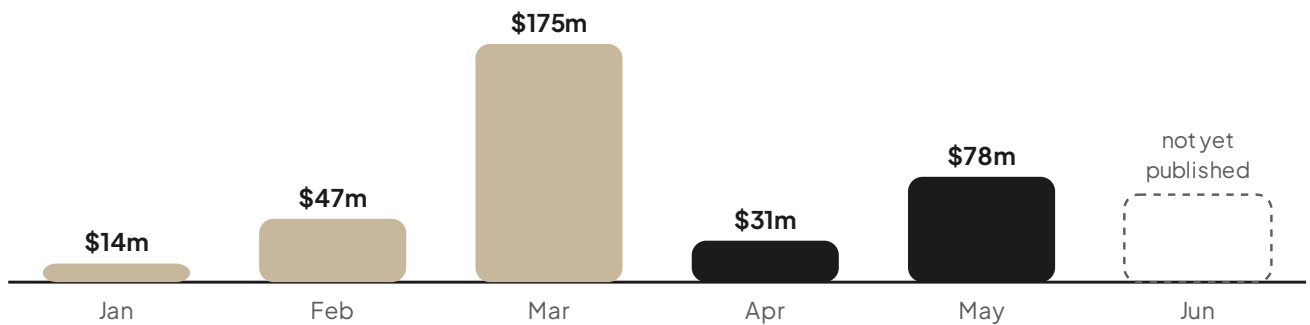
Awards published per month

CONTRACTS · ZERO BASELINE



Disclosed value per month

AUD MILLIONS INCL. GST · ZERO BASELINE



Quarter view

FY26 SECOND HALF

QUARTER	AWARDS	VALUE	MEDIAN
Q3 Jan to Mar	36	\$236m	\$3.09m
Q4 Apr to Jun*	16	\$108m	\$4.61m

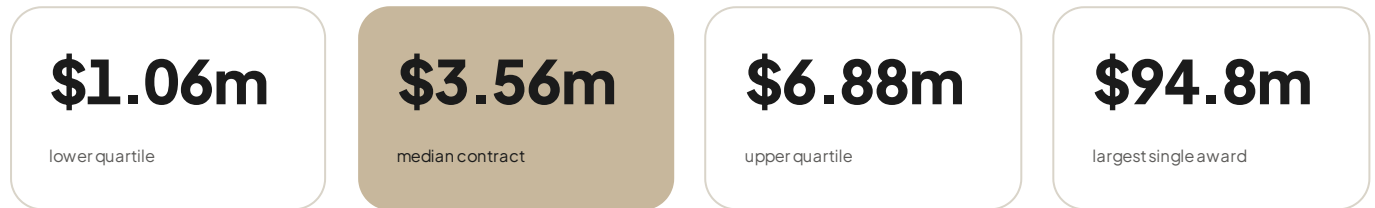
*Q4 includes April and May notices only. Dark bars mark Q4 months. Source: Tendor market data.

Coverage note. TMR construction award notices in Tendor's dataset start in January 2026, so this report compares Q3 with Q4 rather than the full financial year. Q4 includes April and May only; treat it as a floor.

HOW BIG IS A TYPICAL CONTRACT?

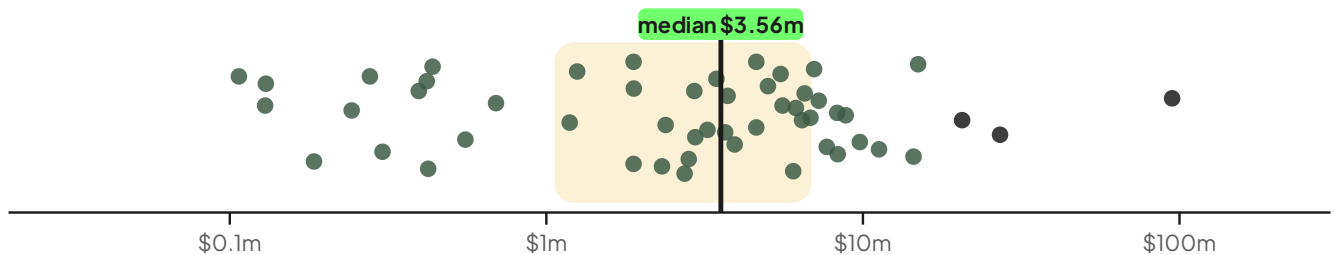
Median TMR contract: **\$3.56m.**

Queensland's state road packages are larger and more even than a typical state agency market. Half sit between \$1.06m and \$6.88m. Three awards above \$20m carry 41% of value, led by the \$94.8m Bruce Highway package shared by three asphalt suppliers.



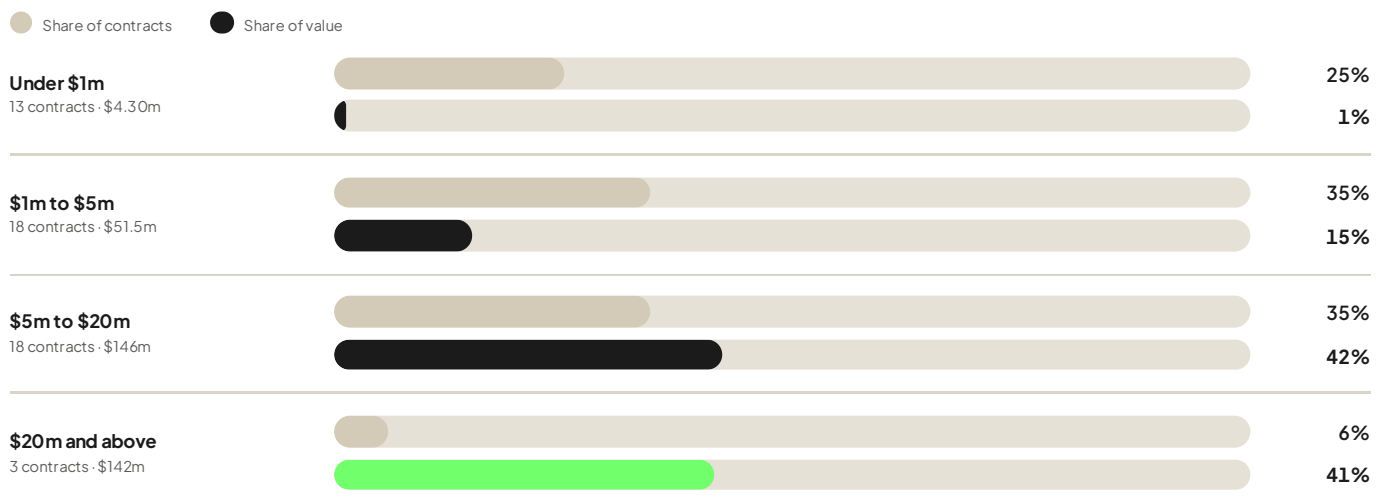
Every award on one scale

EACH DOT IS ONE CONTRACT · CREAM BAND = MIDDLE 50%



Share of contracts vs share of value, by contract size

JAN TO MAY 2026 · 52 AWARDS · \$34.4M



69% of contracts sit between \$1m and \$20m.

That is the middle of the market, and where prequalified regional civil contractors compete hardest.

25% of contracts, 1% of value, under \$1m.

Small TMR works are mostly traffic signals, boat ramps and guardrail. Much of the small road work sits with councils instead.

Value coverage: 52 of 52 awards carry a disclosed value (incl. GST).

WHAT WAS BOUGHT

Pavement work dominates.

Recovery is the second market.

Pavement rehabilitation, asphalt and resurfacing account for 58% of value, much of it under the Bruce Highway Targeted Safety Program. Disaster recovery restoration is the next largest block, followed by highway safety treatments and intersections.

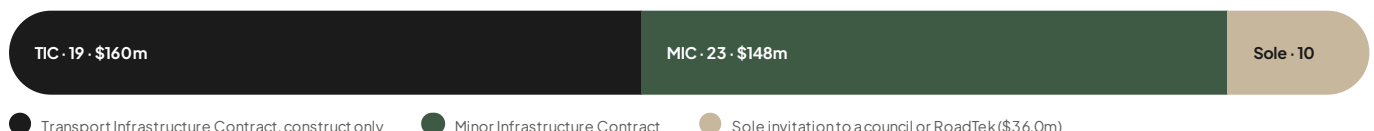
Work type: share of contracts vs share of value

JAN TO MAY 2026 · TENDOR CLASSIFICATION



How TMR contracted the work

BY CONTRACT FORM · VALUE INCL. GST



Contract form is taken from the notice title. Work types are assigned by Tendor from the award description.

TMR DISTRICT OR REGION NAMED IN THE AWARD

Value is regional. Fitzroy and Wide Bay lead.

Every award names its TMR district, region or road location. Fitzroy leads on value because of the Bruce Highway package, Wide Bay Burnett follows on the Bruce Highway Gympie to Maryborough works, and the South West leads on count thanks to DRFA restoration programs delivered by councils.

Disclosed value by district	AUD INCL. GST	Awards by district	CONTRACTS
Fitzroy	\$114m	Fitzroy	4
Wide Bay Burnett	\$55.2m	Wide Bay Burnett	7
South Coast	\$51.5m	South Coast	9
South West	\$36.4m	South West	11
Metropolitan	\$28.1m	Metropolitan	7
Mackay Whitsunday	\$28.0m	Mackay Whitsunday	5
Darling Downs	\$19.0m	Darling Downs	4
Far North	\$9.78m	Far North	3
North Coast	\$1.18m	North Coast	1
Northern	\$0.42m	Northern	1

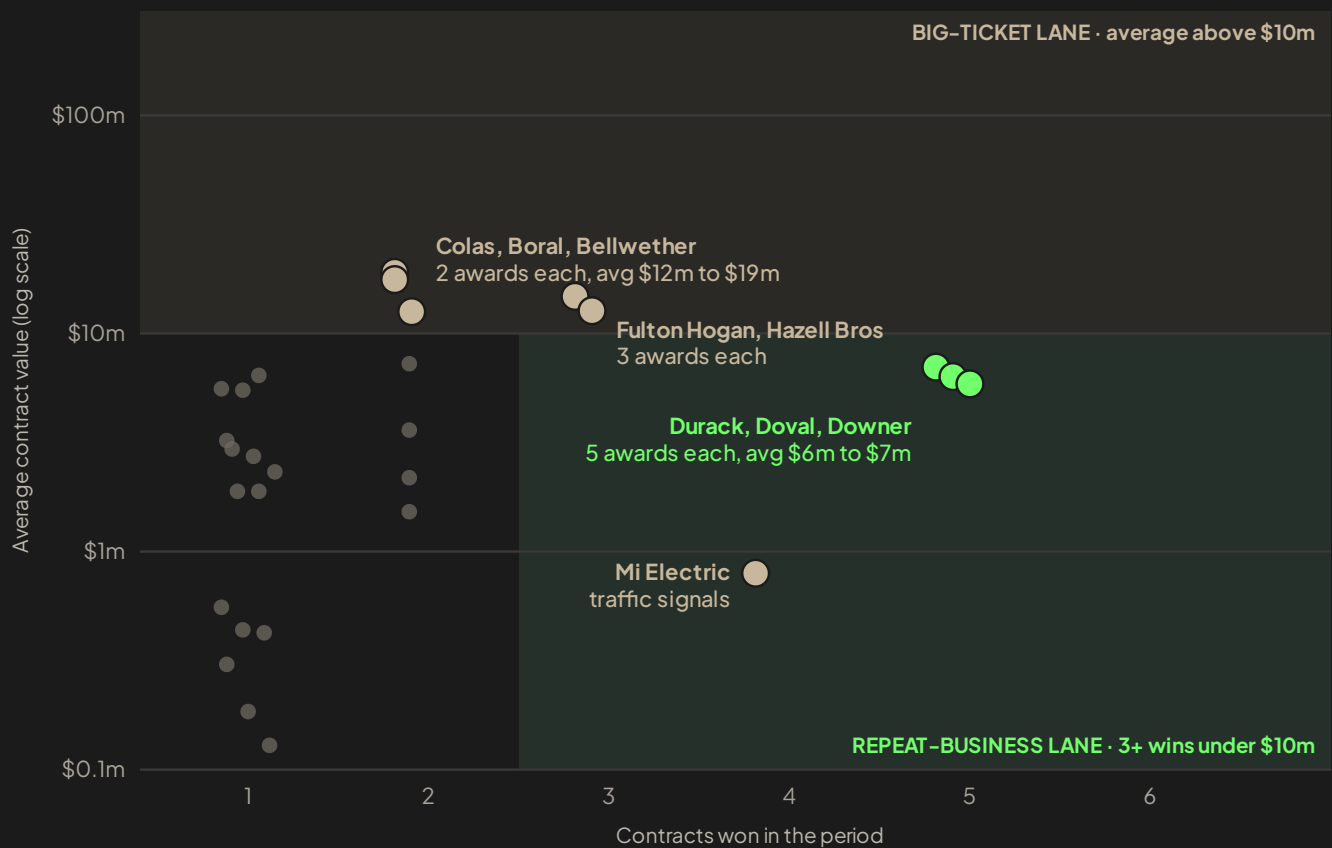


Location is taken from the district, region or road named in each award, not from the buyer's address. Metropolitan includes Brisbane and Moreton Bay works. Where an award spans several districts it is counted once, in the district named first.

SUPPLIER POSITIONING, JANUARY TO MAY 2026

Big packages or a steady regional book.

Each dot is a supplier that won TMR road or civil work. The asphalt majors sit in the top band: two or three awards each, averaging over \$10m. Regional civil contractors sit in the green box, winning five times each at \$6m to \$7m. Queensland's repeat lane runs at a much larger ticket size than NSW's.



BIG-TICKET LANE · ASPHALT MAJORS

Colas 2 · avg \$19.1m

Boral 2 · avg \$17.7m

Fulton Hogan 3 · avg \$14.8m

Hazell Bros 3 · avg \$12.7m

The \$94.8m Bruce Highway package is split equally across Boral, Colas and Fulton Hogan here.

REPEAT LANE · REGIONAL CIVIL

Durack Civil 5 · \$35.1m

Doval Constructions 5 · \$31.7m

Downer EDI Works 5 · \$29.3m

Pavement rehab, DRFA restoration, safety treatments and intersections across several districts.

Where an award names several suppliers, value is split equally between them. Councils and RoadTek winning sole-invitation work are shown as dots but not labelled.

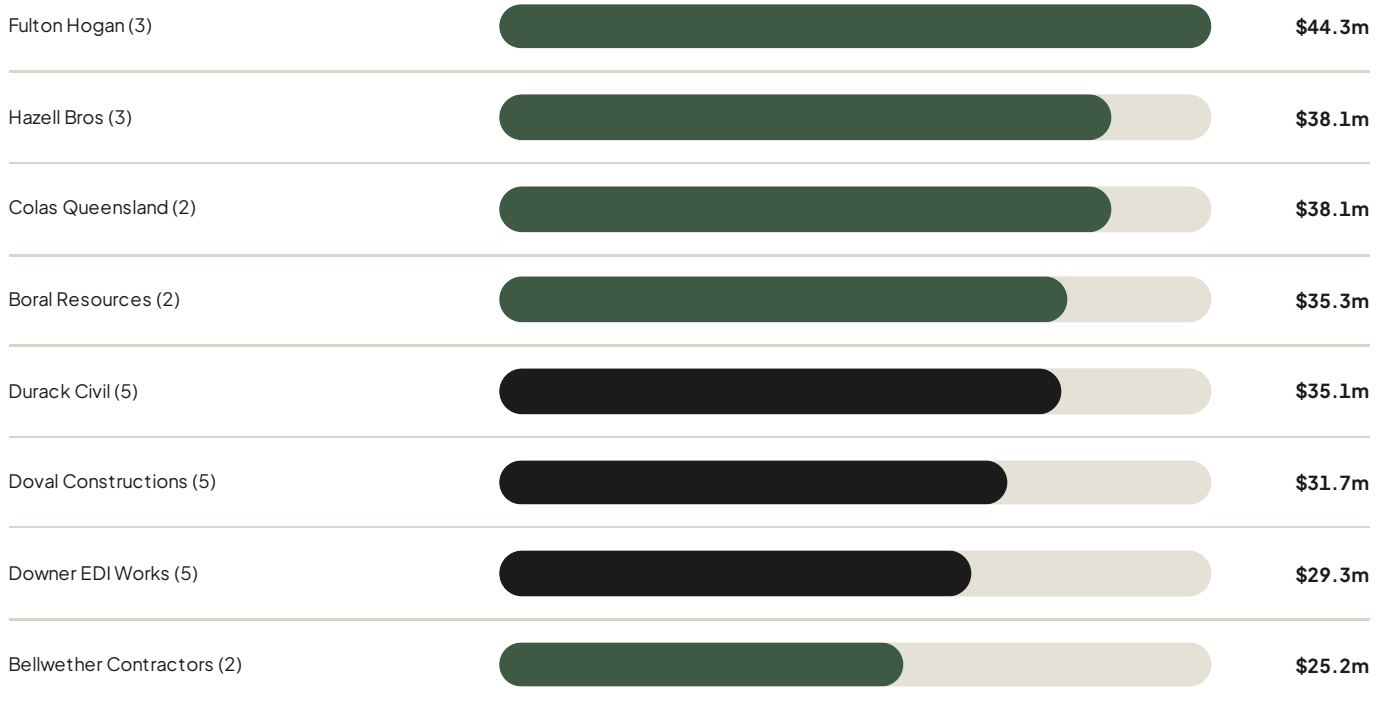
WHO WON

Repeat winners took 75% of awards.

28 suppliers won TMR road and civil work between January and May 2026. 13 of them won more than once and together took 39 of 52 awards. Value is less concentrated than in NSW: the top five hold 56%.

Top 8 suppliers by disclosed value

AWARDS IN BRACKETS - VALUE INCL. GST



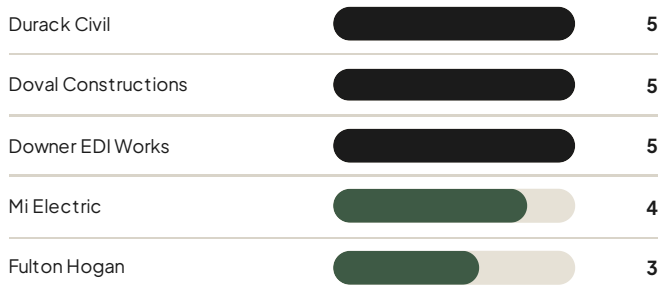
Concentration of value

28 SUPPLIERS - \$34.4M



Most frequent winners

AWARDS WON



19 of 52

awards state the TMR prequalification level required; R2 and R3 roadworks levels are the most common

Read concentration with care. This is concentration within published TMR road and civil awards, not market share. Council-run road contracts and subcontracts are not included.

TENDERS OPENED JUL TO SEP 2026

Recovery work and 2027 maintenance contracts.

Award notices for FY27 Q1 are not yet published, so this page reads the open market: 32 road and civil tender notices sampled from Tendor's live feed for Queensland. These are opportunities being tendered, not confirmed awards.

REPEAT-BUSINESS PRIZE

TMR's **2027 Road Asset Management Contracts** for the Metropolitan and South Coast regions closed in July. These multi-year maintenance contracts (minimum R2, B1, A2 and F75 prequalification in South Coast) lock in network work for years.

COUNCIL RECOVERY WAVE

Goondiwindi, Banana, Noosa, Etheridge and Cassowary Coast councils opened DRFA road restoration packages, and Local Buy reopened its **LB313 Road and Civil Construction** register for councils.

Tender notices by buyer and work type

32 NOTICES · OPENED MAY TO SEP 2026

	DRFA recovery	Pavement	Safety / Intersections	Maintenance (RAMC)	Marine	Design
TMR		2	3	2	2	1
Council	8	7	1	1		1

Notices by month opened

COUNT

May 2026		2
Jun 2026		7
Jul 2026		10
Aug 2026		12
Sep 2026		1

8

council DRFA restoration packages

12

TMR notices, incl. two RAMC regions and new TIC intersections

19

council road and civil notices in the sample

Sample: the 32 most relevant road and civil notices returned for QLD with open or close dates in Jul to Sep 2026 (some opened earlier). Duplicate listings of the same tender are counted once. A tender notice is a signal of demand, not an award.

FOR BID AND BUSINESS DEVELOPMENT TEAMS

Three moves before the next tender.

01

Match your prequalification to your lane.

R2/F15 opens safety and floodway works. R3 with A3 and F25 or above opens the Bruce Highway pavement packages. Plan upgrades a year ahead of the work you want.

CAPABILITY

02

Treat RAMC as a multi-year bet.

The 2027 Road Asset Management Contracts are the largest repeat-business prize on the horizon. Partners, depots and local subcontractor networks decide these bids.

REPEAT LANE

03

Follow the recovery money.

DRFA restoration flows through TMR TICs and council packages. Regional firms with plant close to affected shires can build volume fast.

REGIONAL GROWTH

METHOD AND DEFINITIONS

SCOPE	TMR Transport Infrastructure Contracts (TIC), Minor Infrastructure Contracts (MIC) and sole-invitation contracts for road, pavement, safety, drainage, signals and marine civil works. QBuild building works are excluded.
PERIOD	Notices published 1 Jan to 31 May 2026 (FY26 Q3 and Q4). TMR construction awards in Tendor's dataset begin in January 2026. June notices are not yet published.
VALUE	Disclosed contract value including GST as stated in the notice. It is not spend in the period.
SUPPLIERS	Value on multi-supplier awards is split equally. Location is the district or road named in the award text.
SIGNALS	Tender notices with open or close dates in Jul to Sep 2026, sampled by relevance. Not awards.

52

AWARDS ANALYSED

100%

VALUE DISCLOSED

100%

LOCATION NAMED

37%

STATE PREQUAL LEVEL

