



Australian Government

Australian Trade and Investment Commission

Life Sciences in Australia

A national network driving innovation



AUSTRALIA

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In the spirit of reconciliation we acknowledge the Traditional Custodians of country throughout Australia and their connections to land, sea and community. We pay our respect to their elders past and present and extend that respect to all Aboriginal and Torres Strait Islander peoples today.

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Publication date: December 2025



A national network of life science expertise enabling research, translation, development and commercialisation

Australia's thriving life sciences industry is represented across all of our states and territories, including large and small biotech and healthcare companies, research institutions, hospitals, other health and medical entities, and universities.

Australia's states and territories work collaboratively together, cooperating to ensure that investors and those partnering with Australian companies and organisations have the best possible experience.

Leveraging each state and territory's unique attributes, Australia continues to build and expand our deep capabilities at state, territory and national levels to remain a leader in life sciences as well as maintain and expand our strong international partnerships and trade relationships.

Precincts and hubs

At the state and territory level, Australia's deep expertise is often brought together in health, medical and innovation precincts.

Precincts serve as hubs for research and development, clinical and other healthcare services and education. Attracting a wide range of stakeholders, including researchers, healthcare practitioners and industry partners, they foster innovation and collaboration as well as driving improved health outcomes.

Australia's states and territories are home to numerous healthcare precincts and innovation hubs representing significant expertise and capability across the nation.



New South Wales Transformative innovation in next-gen health

New South Wales (NSW) is internationally recognised for its world class healthcare system and strong integration with research and development. Building on these strengths, the NSW Government has launched the NSW Health Research and Innovation Strategy 2025–2030¹—a 10-year roadmap to harness research and innovation to improve health outcomes.

NSW's dynamic research and innovation ecosystem includes leading research institutions, industry associations, and advanced manufacturing facilities. This ecosystem is deeply embedded within the health system, spanning biomedical and basic sciences, clinical research and trials, health systems research, implementation science, population health, and preventive care.

The state is home to over one-third of Australia's life sciences companies and has the highest-rated start-up ecosystem² in the Southern Hemisphere. Australia ranks 7th globally for health sciences research, reflecting its excellence in medical innovation and collaboration.³ NSW contributes significantly to this standing, being home to a world top 20 ranked university⁴ and all 11 NSW universities offering life sciences degrees. Notably, the University of Technology Sydney recently launched a Master's program in Good Manufacturing Practice (GMP), uniquely focused on medicine manufacturing

NSW hosts 31% of Australia's trial activity⁵ and is globally competitive in early-phase trials and supports the full research continuum—from pre-clinical discovery to late-phase registration trials and translation into care. Public health organisations in NSW typically achieve ethics approvals and contract execution within 90 days, with early-phase trials often approved in 25 days.⁶

A statewide Clinical Trial Management System ensures central oversight and efficient trial delivery across public hospitals.

NSW's diverse population—particularly in urban areas where residents represent over 150 countries—makes it an ideal location for genetically and culturally inclusive clinical trials.⁷

NSW has an active advanced therapeutics sector, serving as a global hub for the research, development delivery of advanced therapies and transformative technologies. Researchers and clinicians in NSW are recognised worldwide for their work in gene and cell therapies, RNA therapies, bacteriophage therapies, plasmid-based therapies, vaccine technologies, immunotherapies, and non-animal technologies. NSW supports this innovation through cutting-edge facilities for research, process development, advanced manufacturing, and delivery.

The NSW Government has invested:

- A\$134.5 million to build one of the first GMP-grade clinical and commercial viral vector manufacturing facilities in the Southeast Asia-Pacific region
- A\$95.8 million to establish an RNA research and pilot GMP manufacturing facility, the first in Australia and one of only a few worldwide. This investment is supported by an additional A\$119 million for RNA research and development.

Central to the state's innovation and research ecosystem is a network of health, education, research and innovation precincts that collaborate to provide comprehensive life sciences research and innovation across NSW. These hubs bring together hospitals, laboratories, universities, research institutes, and industry to train the future workforce, foster collaboration, drive innovation, and attract investment.

Partner with us:

NSW Health offers a free, concierge-style Navigator Service to connect companies and researchers with experts, clinical networks, and infrastructure across the state.

Contact us:

MOH-InternationalDesk@health.nsw.gov.au •



Viral Vector Manufacturing Facility - Westmead NSW

Queensland The gateway to the Asia-Pacific region

Queensland holds a competitive position as a leading biomedical hub in the Asia-Pacific, where world class hospitals, cutting-edge research institutions, and emerging health precincts converge to drive innovation, education, and high-quality care.

Global healthcare and pharmaceutical company, Sanofi, and global leader of medical technologies, Stryker, have chosen to establish a strong research and development presence in Queensland.

Queensland is the fastest growing economy in Australia and enjoys some of the highest levels of business confidence in the nation. It is ideally positioned to continue to attract international companies and build sovereign capability in areas such as the development, manufacture and delivery of vaccines.

The 'Team Queensland' approach supports multidisciplinary collaboration and strong industry partnerships to accelerate development and deliver leading clinical outcomes through:

- global expertise in tropical medicine, immunology and infectious diseases
- an educated, highly skilled workforce with access to world class training facilities
- world class research based within key health and knowledge precincts
- high-value niche businesses supported by an established network of service providers
- expertise in e-health, comprehensive pathology information and telemedicine
- attractive location for clinical trials with sophisticated academic health translation research infrastructure

- access to and shared time zones with high-growth markets in the Asia-Pacific region

Queensland is the ideal location to live and do business with a higher annual growth rate than the rest of Australia, relaxed lifestyle, world famous natural attractions and an average of 300 days of sunshine annually.

With a pro-business government; proximity to Asian economies; a well-educated and skilled workforce; and enviable liveability, Queensland is the perfect place to invest.

Queensland offers a wealth of investment opportunities in the biomedical sector. As Queensland prepares to welcome the world for the 2032 Olympic and Paralympic Games, it's time for international investors to put themselves in a win-win position and choose Queensland as their preferred location.

To learn more about Queensland's biomedical sector, visit:

www.statedevelopment.qld.gov.au/team-qld

Interested in connecting with one of Queensland's biomedical precincts, facilities, companies or institutes?

Contact us:
biomedical@dskilgp.qld.gov.au



South Australia Connected health innovation

South Australia is characterised by deep clinical research, manufacturing and an end-to-end value chain supported by world class infrastructure and digital capabilities. It is a strongly collaborative and connected ecosystem for drug development, advanced manufacturing and data-drive health innovation.

End-to-end clinical trials capability

South Australia offers a unique and efficient ecosystem for clinical trials, serving as an ideal entry point into the Australian clinical research sector. Clinical trials in South Australia are cost-effective, highlighted by the Australian Research and Development Tax Incentive Program of up to 43.5 per cent.

Data-driven precision health innovation

Adelaide is home to world leading artificial intelligence, data analytics and virtual reality capabilities, supported by unique clinical infrastructure, longitudinal datasets and biospecimen for precision health innovation.

Australia's first facility solely dedicated to artificial intelligence research, the Australian Institute for Machine Learning (AIML), conducts globally renowned research in machine learning, artificial intelligence, computer vision and deep learning and collaborates with industry across sectors to develop high-tech products and solutions. AIML works with leading global companies including Roche, GSK and Medtronic to push the frontier of precision health.

Manufacturing capability

South Australia's contract development and manufacturing organisations (CDMOs) support process development through to clinical and commercial scale manufacturing for global markets for Good Manufacturing Practice (GMP) for small molecules and biologics. South Australia offers radiopharmaceutical manufacturing, including access to radioisotopes.

Expertise spans across therapeutics (biologics and small molecules), vaccines, medical devices, nutraceuticals, traditional medicines, and radiopharmaceuticals to GMP requirements.

Drug development and biotech

South Australia is a centre for drug research across a wide range of indications including immunology, infectious diseases, neuroscience and endocrinology.

Oncology is a focus, including precision health, CAR T-cell technology, computational systems, epigenetics, single cell and spatial technologies, gene regulation, molecular signalling, translational oncology and cancer genomics.

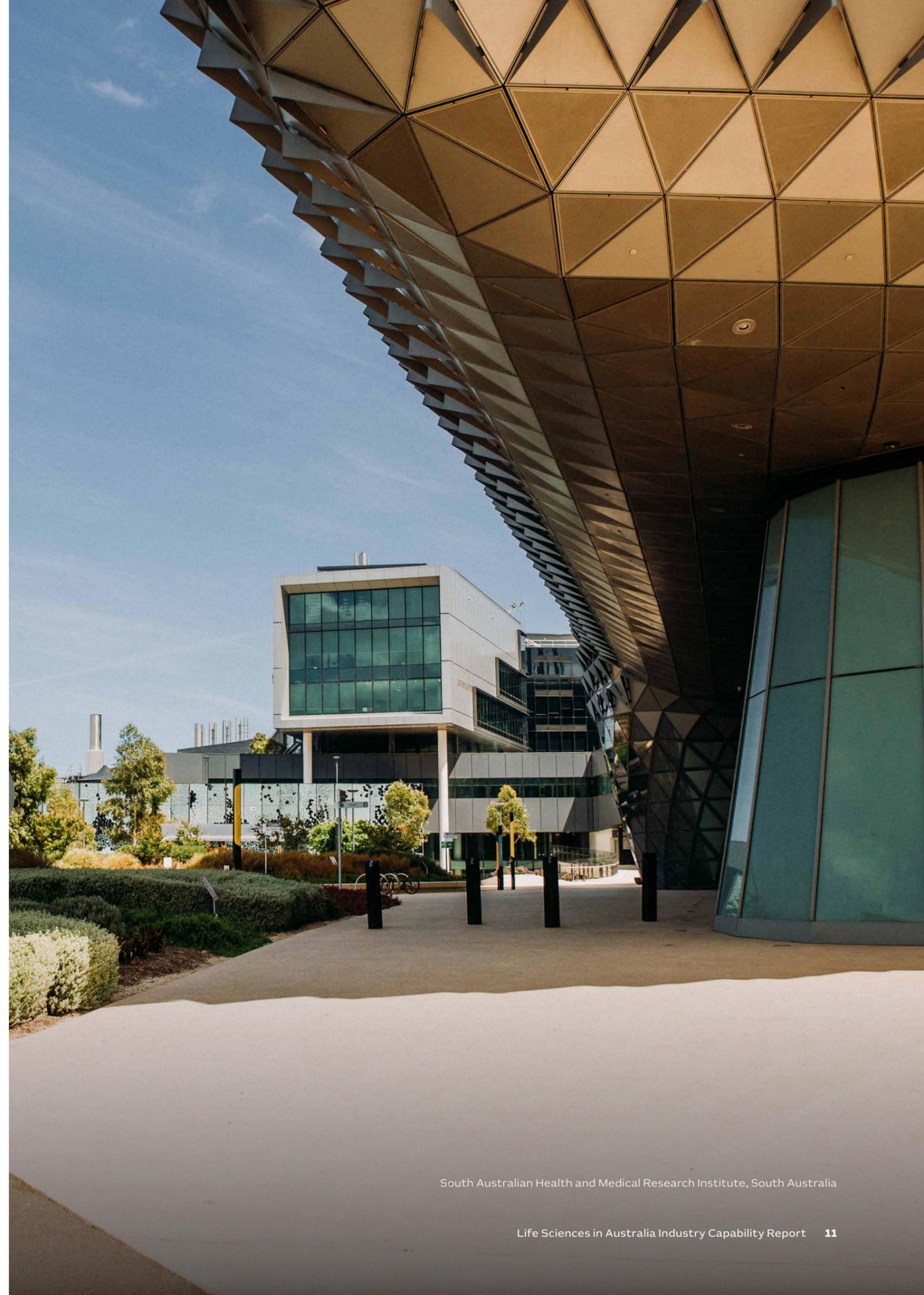
Connected innovation precincts

Adelaide's flagship innovation places include Adelaide BioMed City, an AUD\$3.8 billion investment, Lot Fourteen, focused on critical technologies, and Tonsley Innovation District, centred around advanced manufacturing. These places boast state-of-the-art infrastructure combined with world class researchers, industry, government and academia, spurring a high degree of integration and collaboration.

With Adelaide BioMed City, Lot Fourteen and the universities within walking distance of each other in the central business district, South Australia has a unique clustered environment where health and medical research, manufacturing and clinical care are embedded with technological innovation.

This makes Adelaide and South Australia the perfect location to collaborate, innovate, and trial new products, ready for global commercialisation.

Contact us:
DSD.Health@sa.gov.au



Victoria Where global health tech companies can scale with confidence

Victoria's health technologies industry is one of the Nation's largest, acting as an important global hub for biotech and medtech. The sector develops and manufactures high-quality, innovative pharmaceuticals, medical technologies, vitamins, supplements and topical products for local and global markets. It also includes professional, design and scientific service providers; pharmaceutical wholesalers; and contract research and clinical trial service providers. This thriving industry builds on the foundation of world renowned publicly funded research organisations and health services that conduct fundamental and clinical research.

There are more than 4,644 firms that make up the commercial sector in Victoria, employing over 51,785 staff. In addition, there are 20,000 research sector jobs and more than 122,000 full time equivalent public healthcare workers.

40% of all ASX-listed medtech and pharma companies are based in Melbourne and it is one of the few cities in the world to have two universities in the global top 40 biomedical rankings. Monash University is ranked #2 in the world for pharmacy and pharmacology.

Key capabilities include:

- Manufacturing, with a long history of pharma manufacturing enhanced by significant capabilities in advanced, additive and bio-manufacturing.
- Breakthrough Victoria, a Victorian Government initiative, committed to investing to turbocharge innovation, including investing to establish a Biotech Incubator in Parkville.
- Clinical trials, with 90% of trials conducted in Victoria sponsored by international firms.
- Research, with outstanding capabilities in neuroscience, cancer, regenerative medicines, infectious diseases, and drug discovery helping to drive innovations and intellectual property through the translational path to impact.

- Innovation precincts, such as the Melbourne Biomedical Precinct in Parkville, and Monash Clayton, bringing together a thriving hub of world leading organisations, top tier universities, hospitals and industry.
- Genomics, with world class genomics facilities including the Murdoch Children's Research Institute, Peter MacCallum Cancer Centre, The Advanced Genomics Collaboration, Melbourne Genomics Health Alliance, and Australian Genomics.

Importantly, the Victorian Government has consistently invested into the state's health technologies industry, providing \$4.4 billion in funding support to facilitate Victoria health technology projects since 1999. These have included the Australian Institute for Infectious Diseases; the Cumming Global Centre for Pandemic Therapeutics; the Industry R&D Infrastructure Fund; mRNA Victoria; ANDHealth's Victorian Connected Health Innovation & Commercialisation Centre; the National Vaccine and Therapeutics Lab; and Biobanking Victoria Precision Medicine Services, among many others.

Victoria has dedicated Innovation and Technology-focused expertise with a deep understanding and awareness of the global environment and how companies make global decisions. They are always seeking new opportunities to partner with others to enhance the sustainability of the health technologies industry especially in relation to digital, genomics, diagnostics, drug discovery, vaccines, advanced therapeutics and radiotherapies.

Contact us:

global.vic.gov.au/scale-in-melbourne



Victoria - Moderna, Synchrotron, VHH and Monash University

Western Australia Internationally recognised excellence in health and medical innovation

Western Australia is home to a thriving, and rapidly growing, biomedical ecosystem. With over 250 biomedical organisations and support services based in Western Australia, the sector grew nearly 150% between 2017 and 2024.⁸

Strategically located among the fastest growing economies in the world, Western Australia has significant expertise in biomedical innovation, particularly in:

- Precision health – including using mRNA to treat cancers, using oligonucleotides or small RNA to treat rare diseases, manufacturing advanced cell and gene therapies and substantial “-omics” capabilities. The international centre of expertise in metabolic phenotyping, the Australia National Phenome Centre, is based in Western Australia, as is the Rare Care Centre, which delivers worldleading, innovation, holistic and cross-sector care coordination to children with rare and undiagnosed disease.
- Remote health – Given its position as the single largest health jurisdiction in the world and drawing on world leading experience in remote operations gained through its mining, agriculture, energy, space and defence industries, Western Australia has extensive expertise in the development of remote and virtual healthcare infrastructure, products and services. At Royal Perth Hospital, Hospital in a Virtual Environment (HIVE) sees high-needs hospital patients monitored in both metropolitan and regional areas of the state while thousands of patients annually are connected with specialists via videoconferencing by the WA Country Health Service. Western Australia is also well placed to conduct teletrials given its vast health network.
- Manufacturing – Western Australia hosts a growing number of leading-edge specialist manufacturers of pharmaceuticals, RNA products, medical devices, advanced therapies and digital health products. Western Australia’s first contract development and manufacturing organisation (CDMO), BioCina, provides

sterile liquid pharmaceutical manufacturing with scalability from clinical support to full scale manufacturing.

- Clinical trials and Contract Research Organisations (CROs) – Western Australia is home to a range of CROs and several experienced clinical trials providers, including Linear Clinical Research, undertaking Phase I-III trials across a wide variety of disease areas and delivering rapid patient initiation and high quality assurance.

These areas of expertise are underpinned by world class infrastructure. Western Australia is home to one of the largest biomedical campuses in the southern hemisphere, the Queen Elizabeth II Medical Centre, a 28Ha campus co-located with a world leading university, as well as 21 medical research institutes and foundations, and six tertiary hospitals.

Western Australia also has strong data science infrastructure and high performance computing with two world class supercomputing facilities.

The Western Australian Government proudly and actively supports biomedical growth and activity. Key programs and initiatives include:

- The Future Health Research and Innovation Fund, backed by Western Australia’s \$1.8 billion sovereign wealth fund, which provides dedicated long term funding to support health and medical research and innovation
- The Western Australian Venture Capital Initiative, which provides startups with access to over \$150 million in VC funding
- The Health and Medical Life Sciences Industry Strategy, which provides support for five key focus areas including ecosystem support, facilitating commercialisation, workforce development and talent attraction, encouraging investment and supporting advanced manufacturing.

Contact us:

investandtrade.wa.gov.au



The Kids Research Institute Australia, Western Australia

Australian Capital Territory Accessible, accountable, sustainable

Canberra has a growing life sciences sector, particularly in research and development, with strong links to universities and government institutions. Healthcare and social assistance is the second largest contributor to gross state product (GSP) and professional, technical and scientific, which encompasses life sciences, is also a significant contributor to GSP.

Key areas of focus include biotechnology, medical technology and pharmaceuticals, with a growing emphasis on translating research into commercial outcomes.

The ACT health system is unique as private service providers, university partners and consumer representatives are all linked via the ACT Government which has committed to a strategic framework across its entire health system.

This framework commits to innovation in high-quality care, establishing a learning health system supported by high research capability and deploys the best physical and digital research infrastructure. The framework leverages bilateral agreements between the ACT's three leading universities, ACT Health and Canberra Health Services to build on existing strengths in research management and coordination and facilitate engagement and partnerships with industry.

In 2022, the ACT began implementation of a digital health record to capture information about every visit and treatment undertaken at an ACT public health service – the first Australian jurisdiction to do this. Implementation of a universal digital health record represents a step-change in potentially a whole-of-population laboratory and preferred destination for trials of clinical and public health interventions.

Capability in the university sector across data system development, data linkage and analysis, machine learning and AI, and clinical trials stands ready to partner with and complement business to innovate, design and trial new products and ideas. The ACT already discovers and applies personalised diagnosis and precision therapeutics and has a leading edge in RNA biology.

Health research in the ACT is based at the Australian National University (ANU), University of Canberra (UC), Australian Catholic University, UNSW Canberra, the Canberra Institute of Technology (CIT) and the Commonwealth Scientific and Industrial Research Organisation (CSIRO). The clinical schools of ANU and UC are embedded across all Canberra Health Services facilities, training clinicians in medicine, nursing, midwifery and allied health.

These capabilities are reinforced by Australian Government agencies engaged in health and life science policy and regulation all being based in the ACT as are many major national research facilities. These include the new Australian Centre for Disease Control; the Therapeutic Goods Administration; the National Health and Medical Research Council; National Computational Infrastructure; and the Office of the Gene Technology Regulator.

These collaborations, institutions and frameworks make the ACT as a compelling place for investors seeking to innovate in diagnostics and interventions, clinical care, health maintenance and promotion.

Business partners committed to pushing the envelope, through automation, synthetic biology, or who have opportunities for target discovery and development will find willing partners in the ACT.

Additional information on Canberra can be found at www.canberra.com.au

For more information, please get in touch with the ACT Investment Attraction Team. We can help you over the phone, in person or online.

Contact us:
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Medical sciences at the Australian National University, Canberra

Government and industry life sciences partnership

The Australian Government and Australian life sciences industry work in partnership to drive innovation, global competitiveness and positive health outcomes. By aligning policy, trade and investment frameworks with industry expertise, Government and industry work hand-in-hand to grow Australia's biotechnology, medtech and pharmaceutical capabilities.

Recent collaborations include the AusBiotech and Austrade TradeStart partnership, which embeds a dedicated Head of Global Trade and Partnerships within AusBiotech, as the peak industry body, to help companies expand their export potential. Similarly, the Australian Government's Industry Growth Program sees AusBiotech and other organisations including MTPConnect guiding biotech and medtech SMEs through commercialisation and scaling pathways.

The 2025/2026 Australian Clinical Trials initiative will promote Australia's world-class research capabilities abroad; joint global trade missions coordinated by Austrade create opportunities for industry to build new global partnerships; and the Accessing New Markets program helps emerging health tech companies navigate export opportunities.

Together, these collaborations demonstrate how Government and industry unite around a shared vision, fostering innovation, accelerating commercial success and strengthening Australia's reputation as a global life sciences partner of choice.

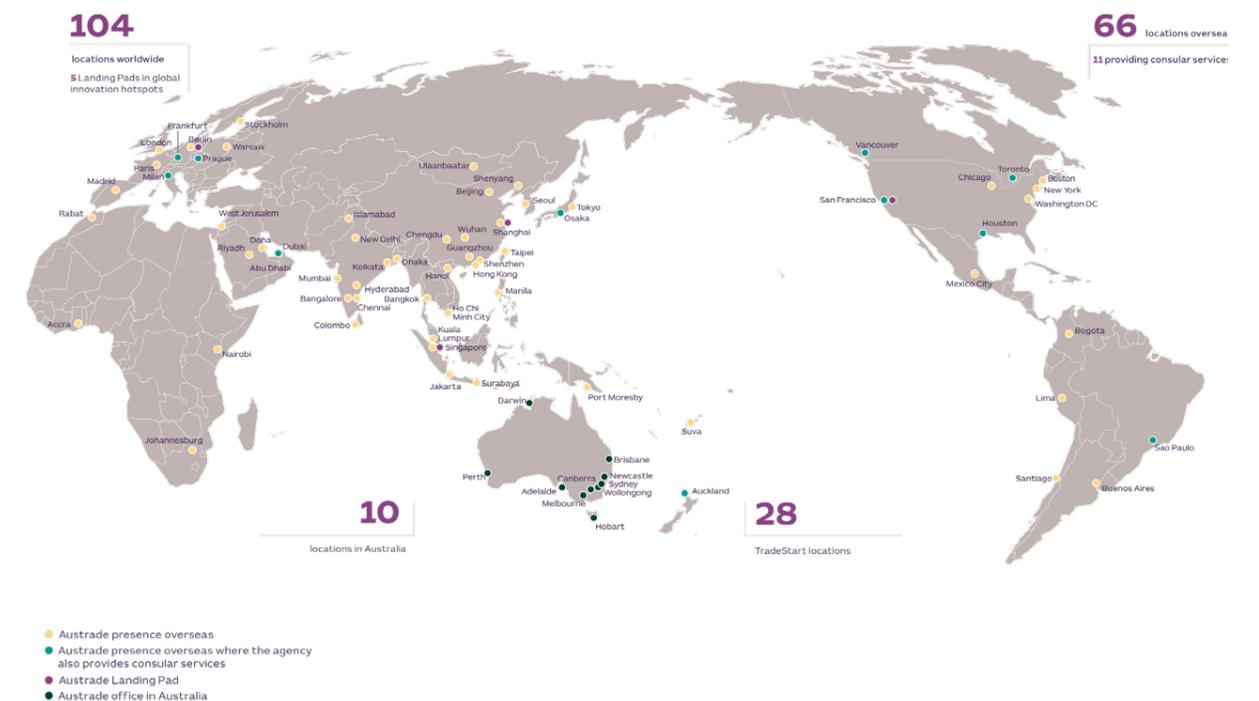
Connect with Austrade

The Australian Trade and Investment Commission (Austrade) is Australia's national trade and investment promotion agency. We facilitate trade and attract foreign direct investment into Australia. Austrade connects global businesses to Australian opportunities, helping foreign investors and buyers do business with Australia. Austrade advisers can provide insight on Australian capability, alert you to latest products and technology from Australia and connect you with Australian companies.

Austrade partners the strengths of Australian businesses with the needs of international markets. We can open the door to a world of opportunities for your business.

Talk to your local Austrade representative for tailored advice and to partner with Australia.

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Our partners

This report has been prepared in collaboration with AusBiotech.



AusBiotech is Australia's life sciences peak body. For almost 40 years, we have worked to support the growth of our more than 3,000 members as they advance breakthroughs in medical science and develop new innovations to help solve some of Australia's and the world's most complex health challenges.

With our unrivalled membership breadth, representing all stages of the health innovation ecosystem, and drawing on our unique national convening power, we advocate for the advancement of Australian life sciences and our members' success as they research, translate, develop and commercialise new health technologies, while supporting knowledge sharing and collaboration to help our life sciences innovators thrive.

Learn more about AusBiotech at www.ausbiotech.org and the annual AusBiotech International Conference www.ausbiotechic.com



