



2026 Weld Australia
Industry & Workforce
Outlook Survey

RESULTS ANALYSIS



2026 WELD AUSTRALIA INDUSTRY & WORKFORCE OUTLOOK SURVEY

ACCESS TO WORK, VERIFIED COMPLIANCE AND SKILLS DEVELOPMENT CRITICAL TO AUSTRALIA'S MANUFACTURING FUTURE

Weld Australia has released the results of its 2026 Industry and Workforce Outlook Survey. The findings demonstrate that Australia's welding and fabrication industry is at a critical turning point. While many businesses remain resilient and cautiously optimistic, the sector continues to face significant pressure from short work pipelines, rising input costs, imported fabricated steel, labour shortages, and inconsistent enforcement of Australian Standards.

The Federal and state governments must commit to strengthening sovereign manufacturing capability through enforceable local content procurement, verified compliance requirements, and practical support for workforce and technology investment. With long-term demand, fair competition and clear procurement signals, Australian fabricators will have the confidence to invest in people, plant, equipment, quality systems and advanced manufacturing.

According to Geoff Crittenden, CEO of Weld Australia, "Australian welding and fabrication businesses are ready to work, ready to train and ready to invest. The problem is not a lack of capability. The problem is that too many local workshops are operating below capacity while work continues to go offshore or is awarded to imported alternatives that are not subject to the same level of compliance scrutiny."

The Survey found that only 15% of respondents have more than six months of confirmed work ahead. By contrast, 60% have three months of confirmed work or less, including 20% with no confirmed pipeline at all. Almost 60% of fabrication workshops are operating below 75% capacity. When asked why their workshop is not operating at capacity, the major reason cited was a lack of work (60%), followed by a shortage of skilled staff (30%).

"These figures should be a warning to governments and major project owners," said Crittenden. "Australian fabricators cannot build capability, employ apprentices or invest in automation without reliable work. Governments must stop treating local content as an aspiration and start treating it as an enforceable procurement requirement."

The Survey also found that imported fabricated steel remains a major concern for industry. When business owners and senior managers were asked how often imported fabricated products fail to meet Australian welding or fabrication standards, 71.4% said this occurs at least sometimes, while more than half said it occurs often or very often.

"This is exactly why Weld Australia continues to advocate for independent verification of imported fabricated steel," said Crittenden. "If imported fabricated steel complies with Australian Standards, it should be welcome. If it does not comply, it should not be used. This is not protectionism. It is public safety, fair competition and common sense."





Cost pressures also remain a key challenge. In the last 12 months, 82.1% of respondents reported an increase in energy prices, while 78.5% reported an increase in material prices. However, only 28.5% reported an increase in selling prices, suggesting that many businesses absorbed rising input costs rather than passing them on. This is reflected in the fact that 39.2% reported a decline in gross profit margin.

Despite these pressures, businesses continue to invest in capability. Half of respondents reported an increase in investment in technology, while 42.8% increased investment in staff training and 39.2% increased investment in research and development. This demonstrates that industry is focused on productivity, skills and long-term competitiveness, even in a difficult operating environment.

“Business owners are caught between rising costs, tight margins and uncertain work pipelines,” said Crittenden. “Yet many are still investing in technology and training because they understand that productivity is essential. What they need is the confidence that there will be a pipeline of work to justify that investment.”

Workforce shortages remain another major risk. Asked whether Australia has enough qualified welders to meet upcoming infrastructure and defence demand, 89.2% of respondents said no. Respondents also identified attracting young people into the trade, non-compliant imported products undercutting local work, the shortage of qualified welders, and low pay relative to skill level as key challenges facing welders today.

“The skills challenge cannot be solved through immigration alone,” said Crittenden. “Australia needs a long-term strategy to attract young

people, support apprenticeships, strengthen TAFE pathways, improve mentoring, and promote welding as the highly skilled, technical and essential trade that it is.”

The Survey also highlights the importance of advanced manufacturing. While welding productivity remains strong, respondents identified poor planning, poor preparation, non-compliant materials and rework as ongoing barriers. Rework remains a hidden productivity cost, with nearly one-third of respondents spending more than 20% of their work time on rework due to quality issues. “A clear pathway to productivity is through better planning, stronger compliance and smarter use of technology,” Crittenden said.

“Automation, cobots, digital systems and advanced welding technologies all have a role to play, but adoption must be practical and supported. Australian SMEs need help to make the right technology decisions, not just pressure to buy equipment.”

Australian welding and fabrication businesses are not asking for special treatment. They are asking for fair competition, enforceable standards, access to work, and support to build the workforce and technology capability Australia needs.

“If governments are serious about sovereign capability, infrastructure delivery and a Future Made in Australia, they must start with the people and businesses that fabricate the steel our economy is built on,” said Crittenden.

“Local content procurement, verified compliance, workforce development and advanced manufacturing are not separate issues. Together, they are the foundation of a stronger, safer and more competitive Australian manufacturing industry.”

RESULTS ANALYSIS



As the peak body representing the welding industry, Weld Australia is committed to supporting its members and the welding and fabrication wider industry. As such, it’s important that we understand both the state of the industry itself, and how we can better serve your needs. The survey was completed by Weld Australia members across the country, including major players in the defence, power generation, mining, rail and infrastructure sectors.

DEMOGRAPHICS

The majority of survey respondents were based in Victoria (31.9%), followed by Queensland (24.6%), and then New South Wales (18.6%) and Western Australia (13.3%) (see Figure 1).

The largest age group was 65+, accounting for 20.4% of respondents, followed by 60 to 64 (15.9%). This is quite different to last year’s results, in which the largest cohort was aged 45 to 49 (at 17%), followed by 40 to 44 (at 15%).

In line with industry trends, almost 85% of respondents were over the age of 40—an even higher proportion than the 78% recorded in the last survey (see Figure 2).

The most commonly cited highest level of education was an apprenticeship or vocational training at 31%, followed by International Welding Specialist at 19%, Master’s Degree at just over 12%, and Bachelor Degree at 11.5%.

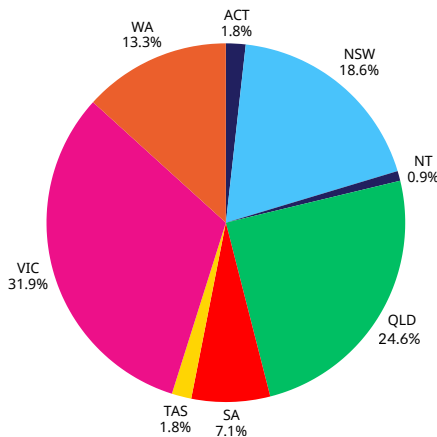


Figure 1. In which state or territory do you live?

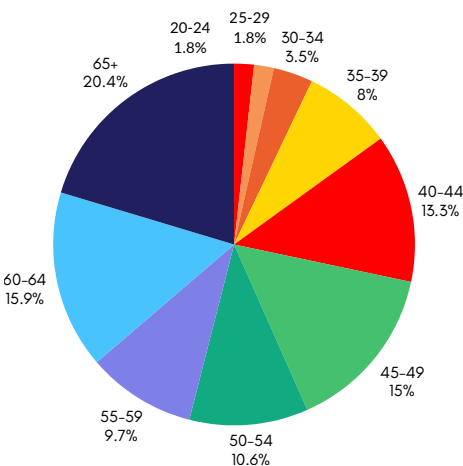


Figure 2. How old are you?

DEMOGRAPHICS

Salaries are relatively healthy compared to Australia's average wage (of around \$106,000 per annum); 34.3% of respondents indicated that their salary is over \$150,000 (up from 24% in the last survey), while another 38% of respondents indicated that their salary is between \$100,000 and \$150,000 (see Figure 3).

Overwhelmingly, respondents are employed full-time (61.9%). Another 11% are either employed part-time or as a sub-contractor. The largest increase in respondents was business owners up from 13% in the last survey to 18.4%.

At 15.7%, the largest cohort of respondents has worked for their current employer or owned their own business for 20 years or more, down from almost 23% in the last survey. However, the results also show a strong spread across experience levels, with more than half of respondents having been with their current employer or business for seven years or more, indicating a stable and experienced industry base.

The largest proportion of respondents work in fabrication (25.6%), followed by education and training (12.5%) and manufacturing (11.8%). Overall, 43.4% of respondents work in fabrication, manufacturing or engineering, down slightly from over 46% in the previous survey, while representation from mining and resources has increased from 6.7% to 10.5% (see Figure 5).

This year's results show strong representation from both SMEs and larger organisations. The largest cohort of respondents works for businesses with 0 to 10 staff (26.3%), up from 17% in the last survey, while 24.3% work for organisations with over 500 staff, down slightly from 26% in the last survey (see Figure 6).

Overall, more than half of respondents work for businesses with 50 staff or fewer, demonstrating strong participation from small and medium-sized enterprises across the welding and fabrication industry.

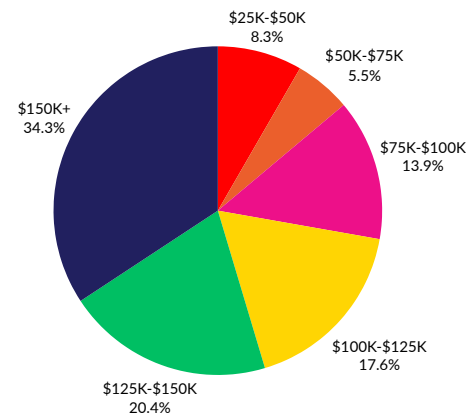


Figure 3. What is your salary?

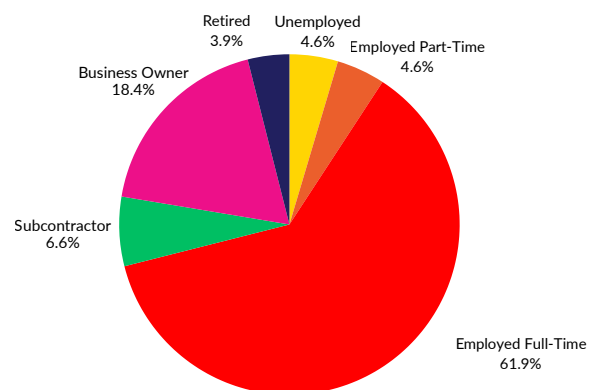


Figure 4. What is your current employment status?

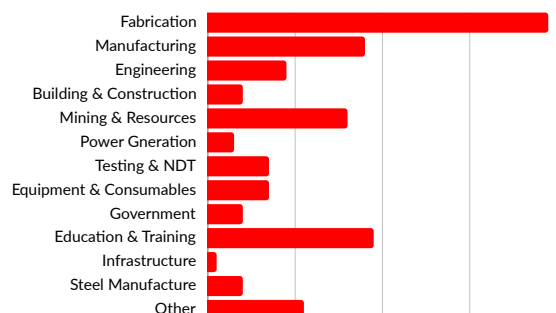


Figure 5. What type of business do you work for?

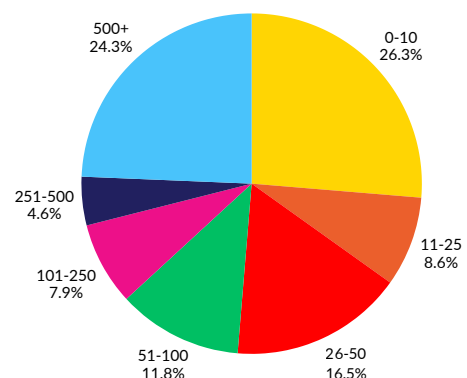


Figure 6. What is the size of the business you work for?



BUSINESS CONDITIONS AND WORK PIPELINE

Short Work Pipelines Remain a Major Constraint

Only 15% of respondents reported having more than six months of confirmed work ahead. By contrast, 20% reported no confirmed pipeline, 12.5% had less than one month, and 27.5% had only one to three months. This means 60% of respondents have three months of confirmed work or less (see Figure 7).

This is a significant concern for an industry that requires long-term investment in people, plant, equipment, certification, quality systems and technology. Short and uncertain pipelines make it difficult for businesses to confidently employ apprentices, invest in automation, or expand capacity.

Recent years have seen an increase in government expenditure in infrastructure, Defence and renewable energy projects, as well as a growing sentiment to buy local. Despite this, almost 6 in 10 Australian welding companies say they have capacity for additional work or that their pipeline is drying up or empty.

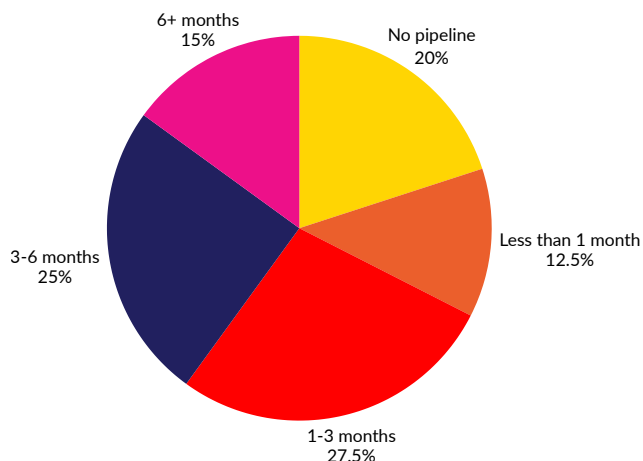


Figure 7. How far ahead is your confirmed work pipeline?

Workshop Capacity Is Still Underutilised

The underutilisation picture is stark: almost 60% of fabrication workshops are operating below 75% capacity (see Figure 8).

Only 25% of respondents reported that their workshop operates at 90% to 100% capacity. 16.1% were operating at 75% to 89% capacity, while 25% were operating at 50% to 74%.

When asked why workshops were not operating at capacity, 60% cited lack of work, followed by 30% citing lack of skilled staff.

The problem is not simply lack of industry capability. Many businesses have capacity. The issue is that too much work is going offshore or being awarded to low-cost imported alternatives without equivalent compliance assurance.

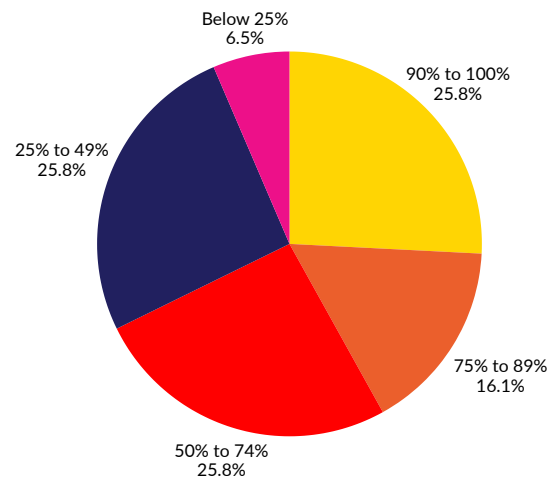
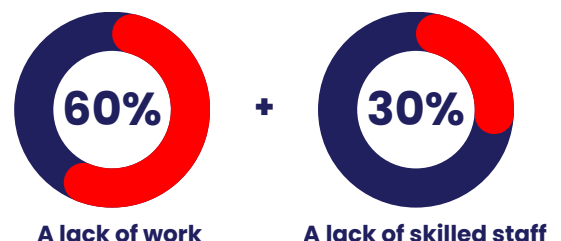


Figure 8. What capacity is your workshop operating at?

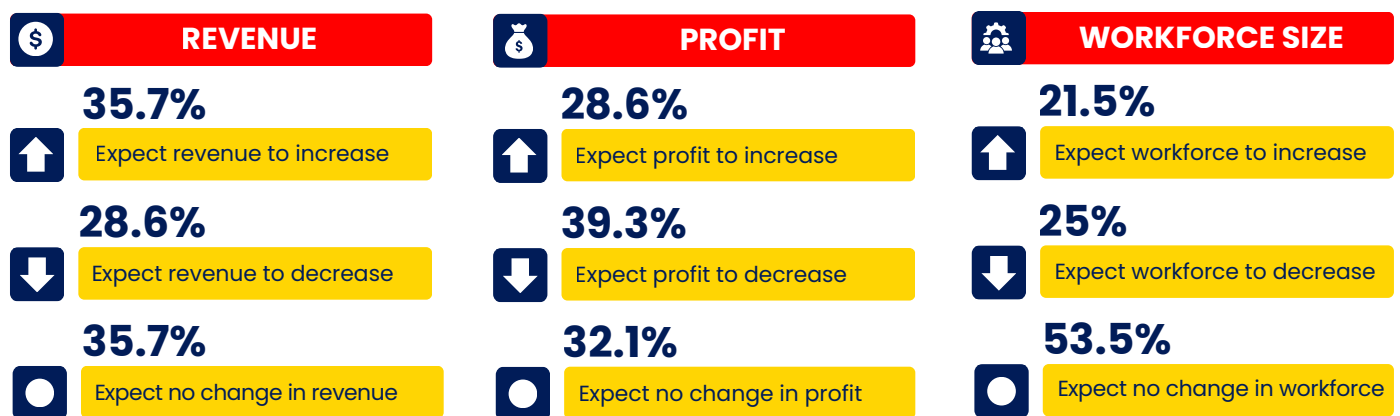
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BUSINESS CONFIDENCE: RESILIENT, BUT UNEVEN

Despite work pipeline pressures, many businesses remain cautiously optimistic. When asked about business prospects over the next six to 12 months, 78.6% of business respondents rated their prospects as either strong or very strong. This is significantly higher than the 68% reported in the previous survey. However, underlying indicators reveal a more mixed outlook for the next 12 months.



Rising Costs, Tight Margins and Cautious Investment

The results indicate a sector under sustained cost pressure, but still investing in capability. In 2025, the most significant increases were in the price of energy (82.1%) and price of materials (78.5%), yet only 28.5% of respondents reported an increase in selling prices (see Figure 9 on the following page). This suggests many businesses absorbed rising input costs rather than passing them on in full, which is reflected in the fact that 39.29% reported a decline in gross profit margin.

General business conditions were mixed in 2025, with 35.7% of respondents reporting a decline, 39.2% reporting no change, and just 25% reporting an improvement. Workforce conditions were relatively stable, with 53.5% reporting no change in workforce size and 64.2% reporting no change in staff turnover. However, more businesses reported a reduction in workforce size than an increase, pointing to ongoing caution in hiring and business expansion.

Despite these challenges, investment remained encouraging. Half of respondents reported an increase in investment in technology, while 42.8% increased investment in staff training and 39.2% increased investment in research and development. This shows that many businesses are continuing to focus on productivity, skills and long-term competitiveness, even in a difficult operating environment.

Looking ahead to 2026, respondents expect many indicators to stabilise, with 50% expecting no change in general business conditions and gross profit margin, and 64.29% expecting no change in workforce size (see Figure 10). However, cost pressures are expected to continue: 71.43% expect both energy and material prices to rise again. While 42.86% expect selling prices to increase, only 25% expect gross profit margins to improve, suggesting that margin pressure is likely to remain a key challenge for the industry.

Overall, the figures point to a cautious but resilient industry. Businesses are not expecting dramatic growth, but many are continuing to invest in technology, training and process improvement. At the same time, persistent increases in energy and material costs reinforce the need for stronger project pipelines, fairer procurement settings, and practical support that helps welding and fabrication businesses remain competitive.

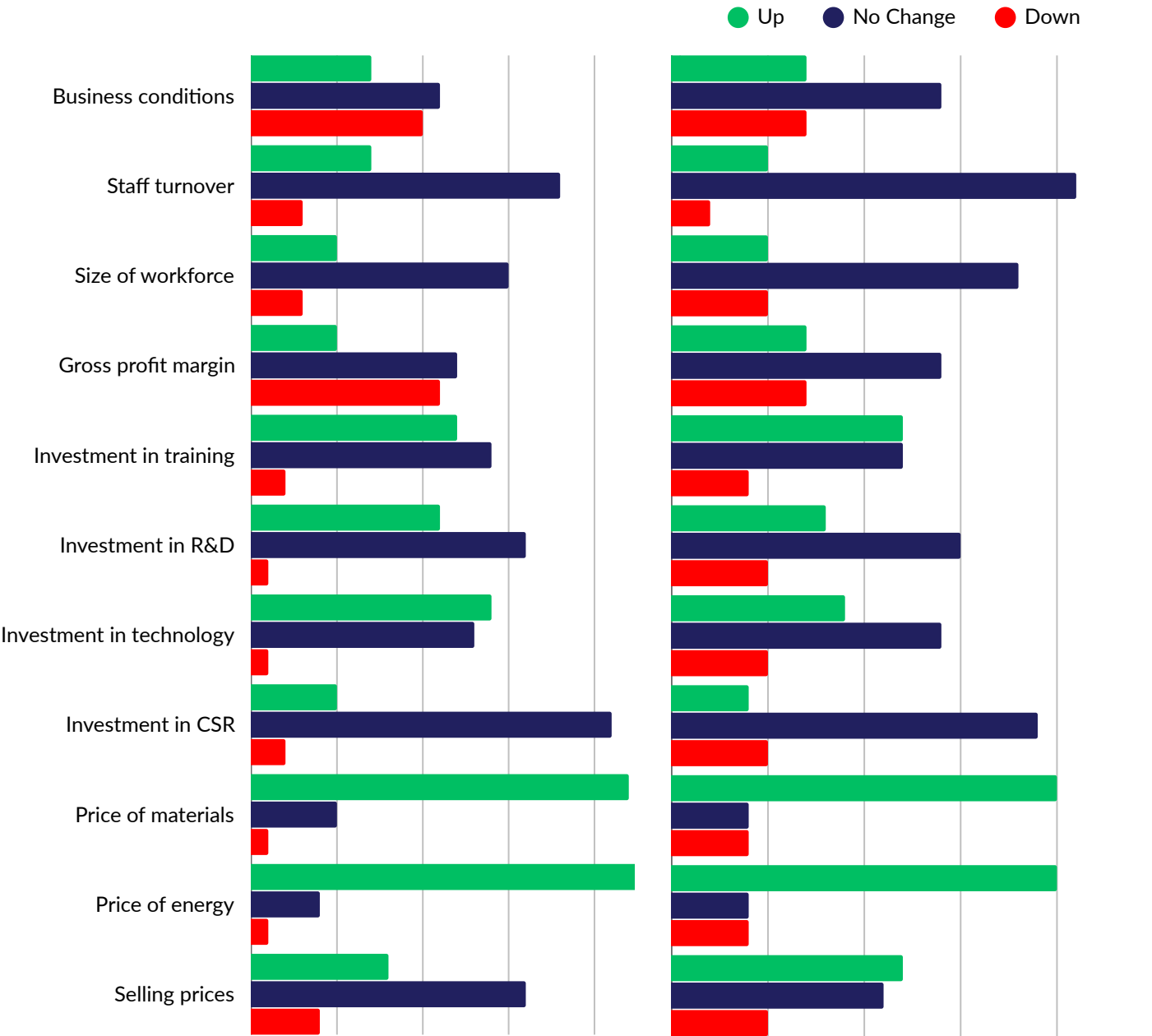


Figure 9. Please rate the performance for the following indicators for your business **last** year - in 2025.

Figure 10. Please rate how you expect the indicators to perform for your business **this** year - in 2026

The Major Barriers to Business Growth

Business owners and senior managers identified several key factors likely to inhibit growth in 2026 (see Figure 11). The top responses were:

- Lack of work: 46.4%
- Labour shortages: 42.9%
- Rising labour costs: 42.9%
- Rising material costs: 35.7%
- Inflation and high interest rates: 35.7%

Note: Multiple responses were permitted. Percentages represent the proportion of respondents who selected each option.

When asked for their single main concern right now, lack of work was the leading issue at 35.8%, followed by labour shortages at 21.4% (see Figure 12). This marks a shift from the last survey, where labour shortages and lack of work were equal leading concerns at 21.4%.

The increasing prominence of lack of work reinforces the need for procurement reform. Australian fabricators cannot build capacity without reliable demand.

Local Manufacturing: A Source of Optimism

Despite pressure from rising costs and uncertain pipelines, respondents are optimistic about rising demand for local manufacturing. When asked what they were most optimistic about (multiple responses permitted):

- 50% selected rising demand for local manufacturing
- 35.7% selected revenue growth
- 35.7% selected major project commencements
- 28.6% selected efficiency gains through process improvement
- 25% selected technological investment

This is an important finding. It shows that industry sees opportunity in domestic capability, particularly as Australia prepares to deliver major infrastructure, defence, energy and renewable projects.

However, optimism alone will not translate into work. Governments must implement procurement policies that recognise local capability, verified compliance and whole-of-life value—not just lowest upfront cost.

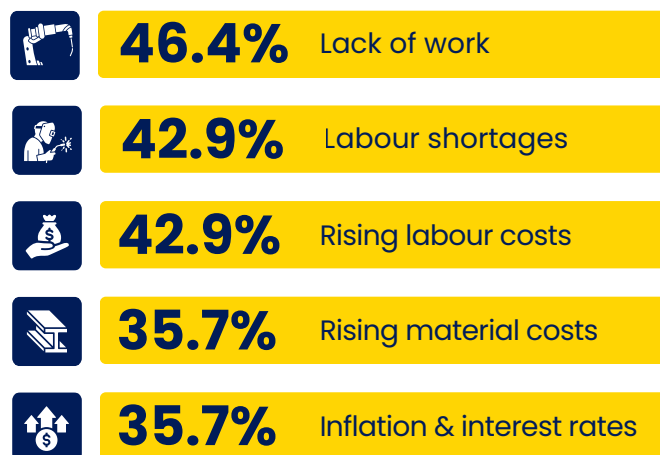


Figure 11. As a business owner or senior manager, what factors are most likely to inhibit the growth of your business in the next 12 months? (Multiple responses permitted)

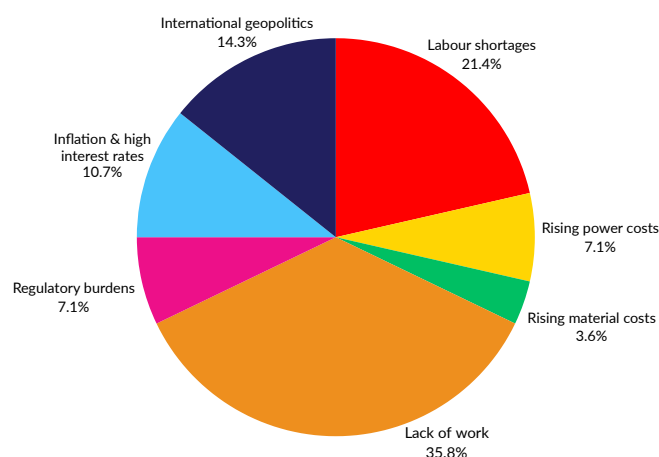


Figure 12. As a business owner or senior manager, what is your number one main concern right now?

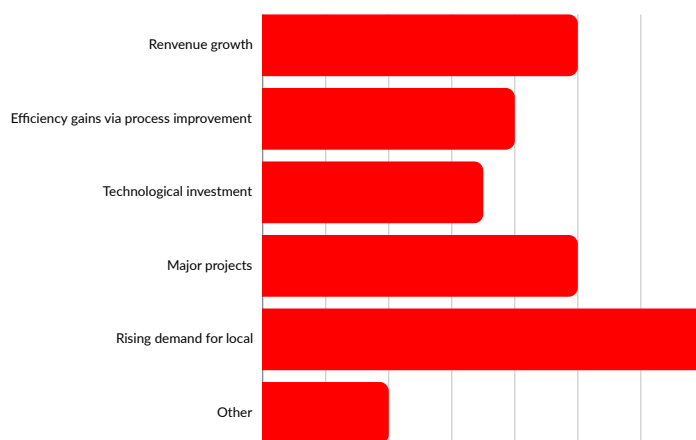


Figure 13. As a business owner or senior manager, what are you most optimistic about right now?

IMPORTED FABRICATED STEEL & COMPLIANCE



The survey confirms that non-compliant imported fabricated steel is not a theoretical concern. It is being experienced regularly by industry. When imported products fail to meet Australian welding or fabrication standards, the costs are pushed onto local contractors, asset owners, taxpayers and the public.

The solution is not complicated: all fabricated steel used in Australia must be independently verified to Australian Standards before it is installed.

One of the most significant findings in the 2026 survey is the level of concern about imported fabricated products.

When business owners and senior managers were asked how often imported fabricated products fail to meet Australian welding or fabrication standards (see Figure 14):

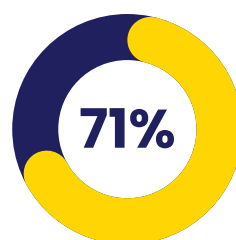
- 32.1% said very often
- 21.4% said often
- 17.9% said sometimes

Together, this means 71.4% of respondents have experienced imported fabricated products failing to meet Australian welding or fabrication standards at least sometimes.

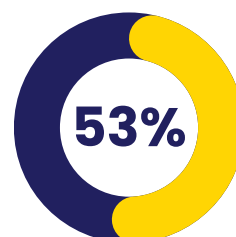
More than half—53.6%—said this occurs often or very often.

This is a direct endorsement of Weld Australia's advocacy on imported fabricated steel, verified compliance and the Australian Fabrication Authority.

Australian fabricators are required to comply with Australian Standards, qualified supervision, welding procedures, inspection requirements and quality systems. If imported fabricated steel is not subject to equivalent scrutiny, compliant Australian businesses are placed at a structural disadvantage.



Report imported fabricated products failing to meet Australian standards



Say they experience this often, or very often

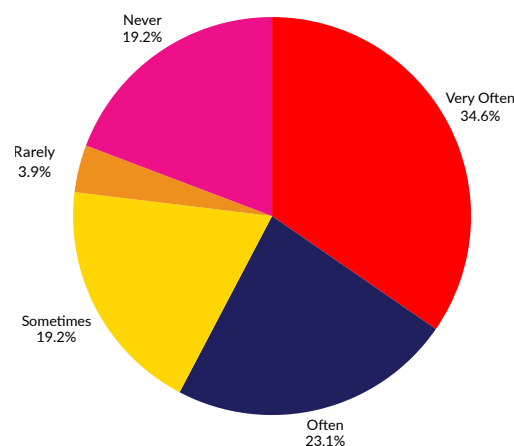


Figure 14. How often do imported fabricated products fail to meet Australian standards?

WORKFORCE & SKILLS SHORTAGES



AUSTRALIA DOES NOT HAVE ENOUGH WELDERS

The survey results are stark on workforce capacity. Asked whether Australia has enough qualified welders to meet upcoming infrastructure and defence demand, 89.2% of respondents said no. Only 10.8% believe Australia has enough qualified welders. Respondents also reported low confidence in Australia's ability to deliver major projects without importing labour.

This result should concern governments, major project owners and defence primes. Australia's pipeline of infrastructure, renewable energy, defence and advanced manufacturing work cannot be delivered without skilled welders, supervisors, inspectors and welding engineers.

Attracting Young People Is the Biggest Challenge

When welding professionals were asked about the biggest challenge facing welders in Australia today, the top responses were (see Figure 15):

- Attracting young people into the trade: 21.1%
- Non-compliant imported products undercutting local work: 23.7%
- Shortage of qualified welders: 19.7%
- Low pay relative to skill level: 17.1%

The fact that non-compliant imported products ranked so highly among individual welding professionals is notable. It shows that imported steel is not just a business-level concern; it is also affecting welders' perception of job security, work availability and the future of the trade.

Welding Still Has Strong Career Loyalty

Despite these pressures, the welding trade retains strong long-term commitment. 88% of respondents see welding as a long-term career; and 68.7% have not considered leaving the trade in the past two years.

The industry must do more to improve career pathways, respect for the trade, working conditions and public understanding of welding as a highly skilled profession.

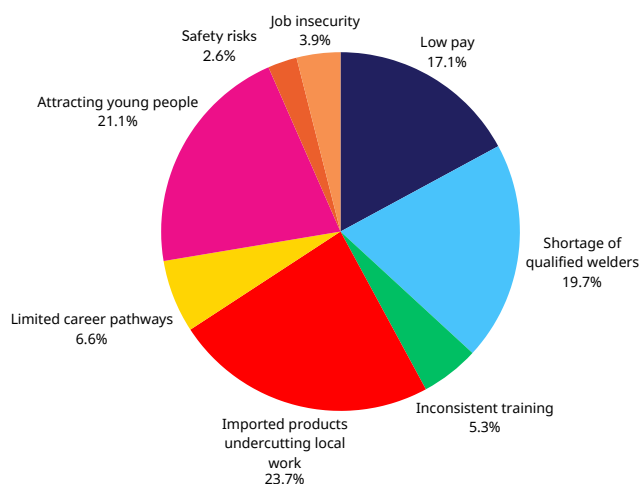


Figure 15. What is the biggest challenge facing welders in Australia today?



View welding as a long-term career



Have not considered leaving the industry in the last two years

WORKFORCE & SKILLS SHORTAGES



THE RESPECT GAP

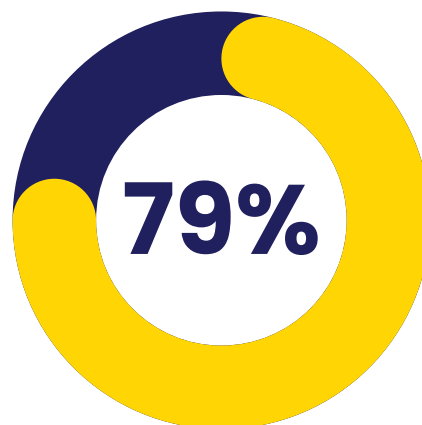
One of the clearest messages from the 2026 survey is that welders do not feel sufficiently recognised.

When asked whether the trade of welding receives the respect it deserves, 79.5% said 'No'.

This matters. Welding is a highly skilled, technical, safety-critical profession. It underpins infrastructure, defence, energy, mining, construction, manufacturing and transport.

Yet public understanding of welding remains limited. Too often, it is still viewed as a low-tech trade, rather than a profession involving standards, metallurgy, inspection, quality control, robotics, automation, engineering and advanced manufacturing.

This perception problem directly affects recruitment, retention and apprenticeship uptake. Changing the way welding is promoted (to students, parents, careers advisers, government and the wider public) must be a priority.



Of respondents believe the trade of welding doesn't receive the respect it deserves



APPRENTICESHIPS AND THE NEXT GENERATION



Recruitment Challenges Are Cultural

The survey highlights the need to improve how welding careers are promoted to young people. Respondents identified the main challenges in recruiting people into welding as (see Figure 16):

- Negative perceptions of manufacturing and trades: 52.3%
- Lack of awareness of welding careers: 51.2%
- Limited school engagement: 40.7%
- Lack of suitable candidates: 39.5%
- Competition from other trades: 37.2%

These results strongly support Weld Australia's ongoing advocacy for earlier school engagement, stronger TAFE funding, and programs that expose students to modern welding technologies.

Why Apprentices Leave

Respondents identified the main reasons apprentices leave the welding industry as: working conditions (51.2% of respondents); poor understanding of the role before starting: (50%); wages (48.8%); and moving to other industries (33.7%) (see Figure 17).

This suggests that attraction is only half the problem. Retention also depends on realistic pre-entry information, mentoring, workplace culture, career development and visible long-term pathways.

What Would Help Businesses Recruit and Retain Apprentices

The supported measures were (see Figure 18):

- Pre-apprenticeship programs: 61.6%
- Improved training programs: 60.5%
- Financial incentives / subsidies: 58.1%
- Mentoring programs: 52.3%
- Better school outreach: 43%
- Industry promotion campaigns: 43%

This is a clear roadmap for industry and government. Apprenticeship reform must be practical, industry-led and connected to real workplaces.

Note: Multiple responses were permitted. Percentages represent the proportion of respondents who selected each.

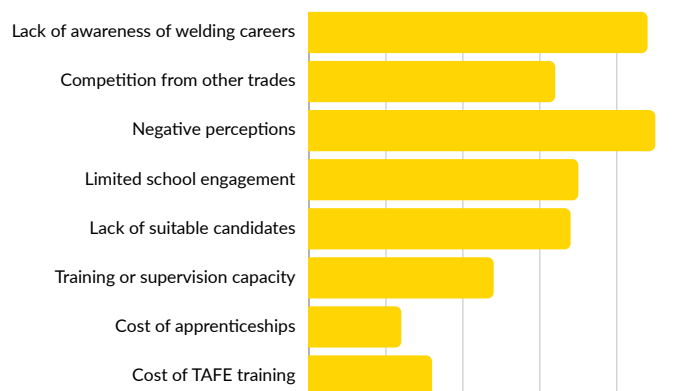


Figure 16. What do you think are the main challenges when recruiting young people into welding?

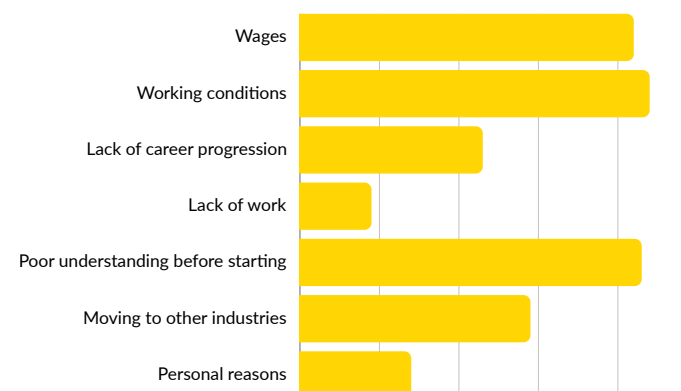


Figure 17. What do you think are the main reasons apprentices leave the welding industry?

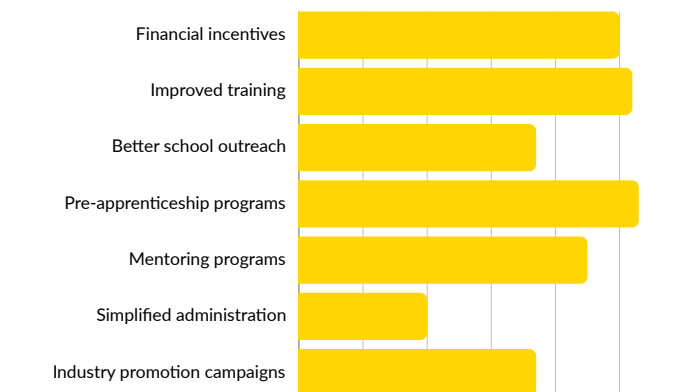


Figure 18. What support do you think would help businesses recruit and retain more apprentices?

WOMEN IN WELDING



Most Businesses Employ No Female Welders

While many workplaces believe they actively support diversity, female representation remains extremely low.

Among respondents asked how many female welders were employed in their business:

- 74.4% reported zero female welders
- 9.3% reported one female welder
- 8.1% reported two to three female welders

This indicates that many businesses support the idea of gender diversity, but have not yet translated that support into actual workforce participation.

Workplace Support Is Improving, But Barriers Remain

Encouragingly, 81.4% of respondents agreed or strongly agreed that their workplace actively supports gender diversity and inclusion (see Figure 19).

However, 30.3% said they had witnessed or experienced gender-based bias or discrimination frequently or occasionally (see Figure 20). If respondents who answered “rarely” are included, more than half have observed or experienced bias at some level.

The main barriers identified for women entering or staying in welding were (see Figure 21):

- Stereotypes about welding and gender roles: 39.5%
- Lack of role models and mentors: 32.6%
- Work environment not welcoming: 31.4%
- Lack of flexible working arrangements: 17.4%
- Recruitment processes: 17.4%

These results support a continued focus on Women in Welding, mentoring, school outreach, visibility of female role models and workplace culture change.

Note: Multiple responses were permitted. Percentages represent the proportion of respondents who selected each option.

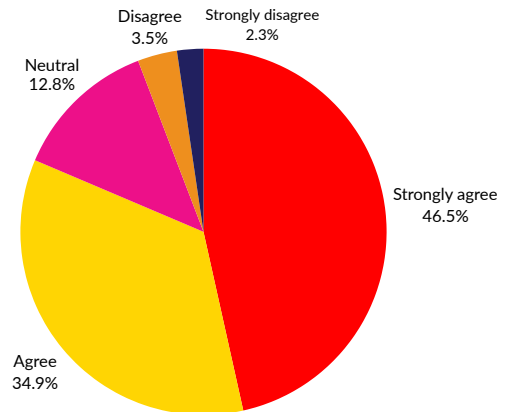


Figure 19. To what extent do you agree with: “My workplace actively supports gender diversity and inclusion”.

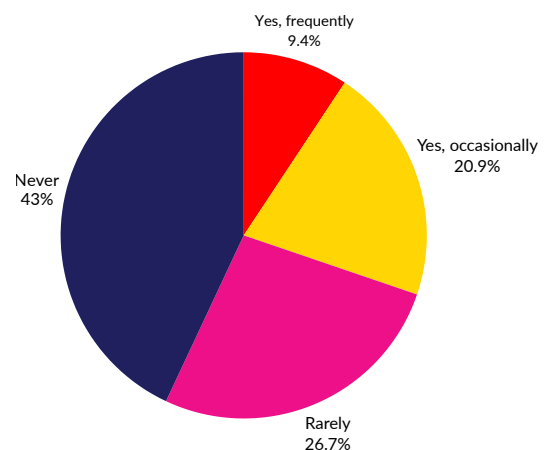


Figure 20. Have you ever witnessed or experienced gender-based bias or discrimination in the welding industry?

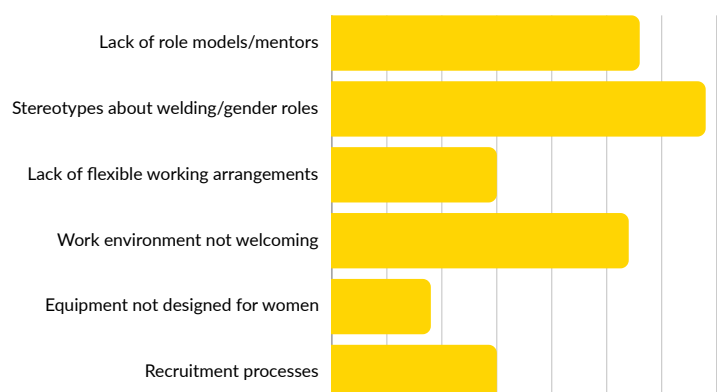


Figure 21. What do you think are the main barriers for women entering or staying in welding?

SKILLS, TRAINING AND COMPETENCY

While many respondents feel confident in their own practical competency, the split view on whether trade training prepares welders for real-world conditions highlights the need for closer alignment between formal training, workplace expectations and industry-led competency development.



Standards Knowledge Is the Biggest Skills Gap

Respondents identified the skills most lacking in the current welding workforce as (see Figure 22):

- Welding to standards: 69.9%
- Reading drawings: 55.4%
- Quality compliance: 54.2%
- Weld defect identification: 49.4%
- Productivity / efficiency: 44.6%
- Automation capability: 38.6%
- Supervision and mentoring: 38.6%
- Apprenticeship readiness: 38.6%

This is highly significant. The top four responses all relate to compliance, quality and technical interpretation.

Interestingly, when asked 'are you confident working to Australian Standards without supervision', an overwhelming 87.9% of respondents answered 'Yes'. And, when asked 'do you believe your current qualifications fully reflect your practical competency on the job', 73.4% of respondents answered 'Yes'.

Training Is Not Fully Aligned With Site Conditions

When asked whether trade training adequately prepares welders for real-world site conditions: 45.8% said 'Yes'; 43.4% said 'No'; and 10.8% were unsure (see Figure 23).

This split result shows that while many respondents value the training system, there is still a significant gap between formal training and site or workshop realities. This reinforces the need for stronger industry involvement in training design, more practical exposure, better workplace-based learning and improved links between TAFEs, employers and industry bodies.



Figure 22. What skills do you believe are most lacking in the current welding workforce?

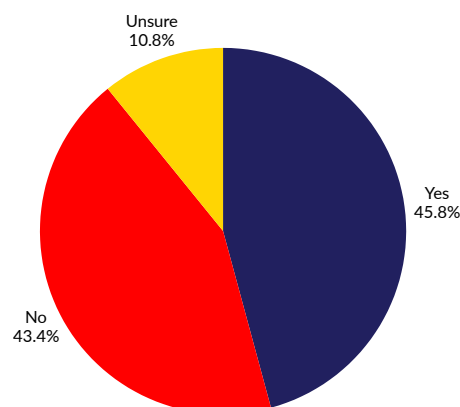


Figure 23. Do you feel trade training (TAFE/apprenticeship) adequately prepares welders for real-world site conditions?



PRODUCTIVITY, ARC-ON TIME AND REWORK

Welding Productivity Remains Strong, But Barriers Persist

Two-thirds of respondents rated the productivity of their current welding staff as good or excellent, consistent with the last survey. In 2026, 57.1% rated productivity as good, 23.8% rated it average and 9.5% rated it as excellent.

Arc-on time appears to have improved compared with the last survey. 23.8% of respondents indicated that welders spend more than 6 hours per shift welding; 19% indicated 6 hours; and another 19% indicated 5 hours. This is compared to the last survey, in which 58% of respondents reported four hours or less of welding per shift.

When business owners were asked what the main obstacles affecting the productivity of the staff were, they cited: staff shortages (25.9%); joint preparation and fit-up (25.9%); materials handling (22.2%); and post-processing (18.5%) (see Figure 24).

When welders were asked what limits their productivity on site, they cited: poor planning (40.4%); poor preparation (15.8%); non-compliant materials (10.5%) and rework (10.5%) (see Figure 25).

Rework Is a Hidden Productivity Cost

More than one-third of respondents reported spending more than 20% of their work time on rework due to quality issues (see Figure 26). This is a major productivity drag. Rework consumes labour, delays delivery, increases costs, reduces margin and undermines confidence. It also links directly to the need for stronger compliance, adherence to standards, welder qualification, and the need to build quality into the process rather than inspect it at the end.

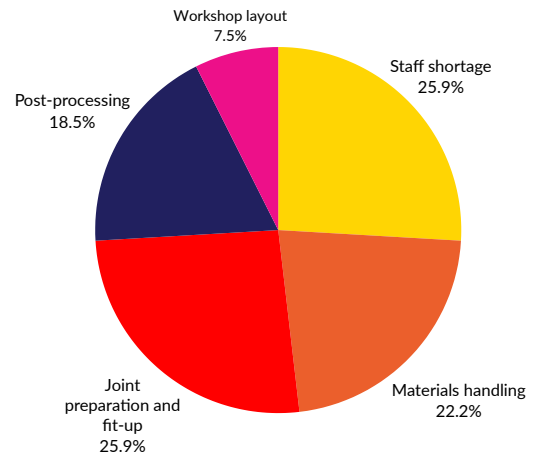


Figure 24. Which activities or obstacles most affect the productivity and efficiency of your welding staff?

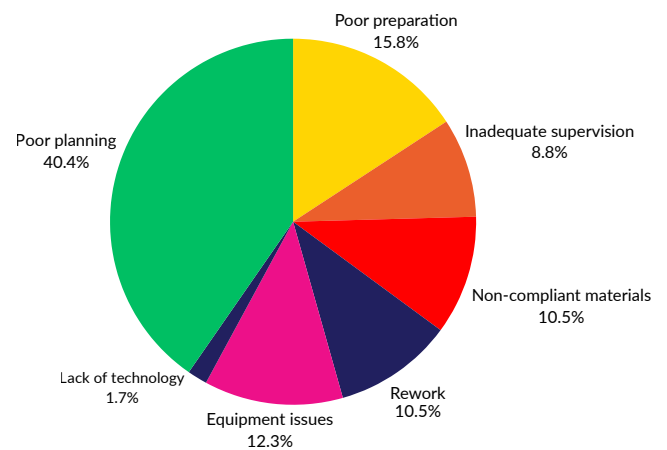


Figure 25. What typically limits your productivity on site?

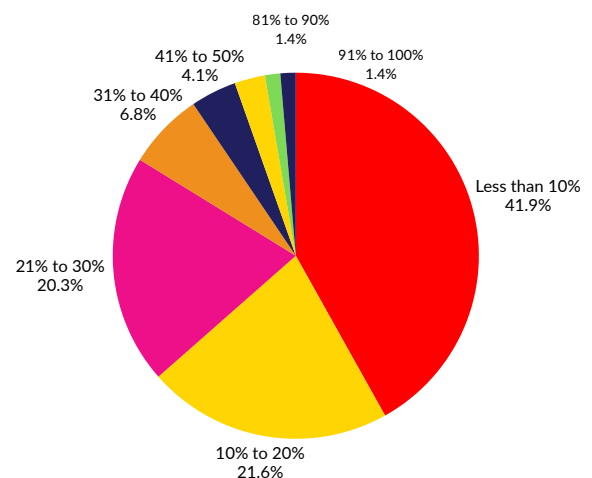
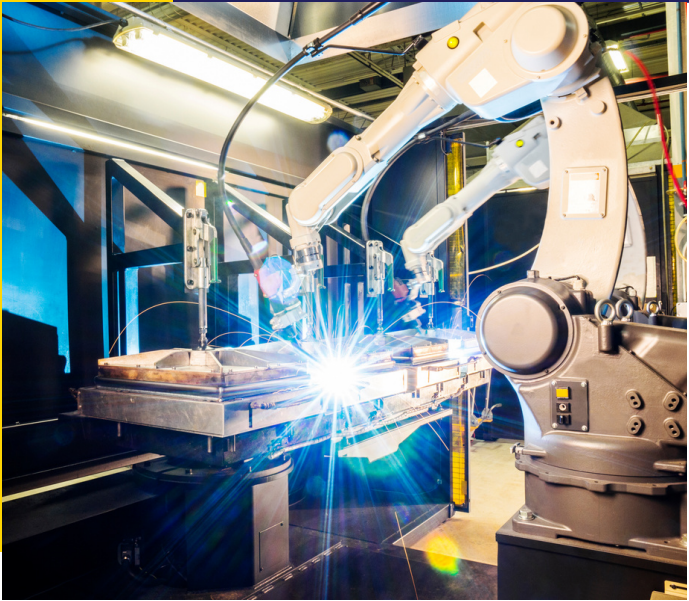


Figure 26. How much of your work time is spent on rework due to quality issues?

TECHNOLOGY ADOPTION



The uptake of advanced welding technology remains relatively slow. 40% of survey respondents have no technology exploration currently planned. Technology investment has not risen substantially since 2023, and in some areas has dropped.

When business owners and senior leaders were asked what type of technology they would be most likely to explore in the two years (see Figure 27):

- 40% are likely to explore cobots
- 30% are likely to explore laser welding
- 15% are likely to explore robotics

Barriers to implementing automated welding technologies include: high capital cost (50%); low production volumes or unsuitable work types (40%); uncertain return on investment (30%); lack of skilled operators or programmers (20%) and difficulty integrating automation with existing processes (20%) (see Figure 28).

Given that the major barriers to productivity are materials handling and a lack of skilled staff, there is a clear opportunity for welding businesses to harness the capabilities of advanced welding technologies to help address these issues.

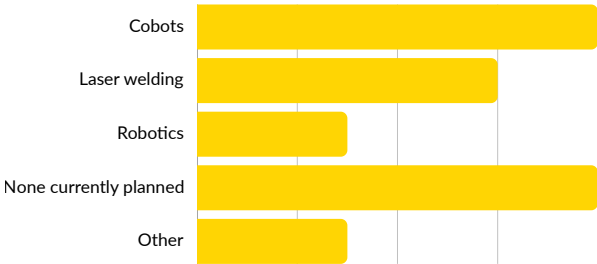


Figure 27. Which technologies are you most likely to explore in the next two years?

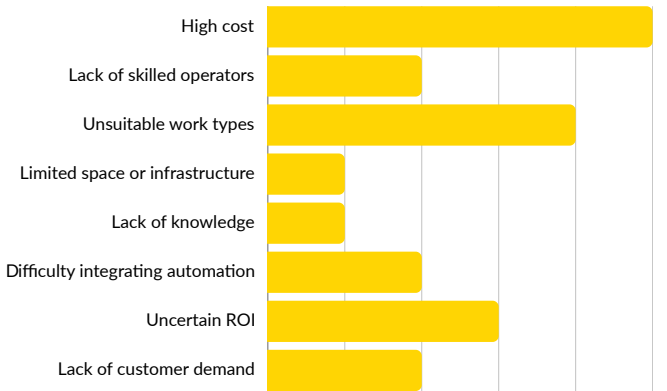


Figure 28. What are the barriers preventing your business from adopting welding technology?

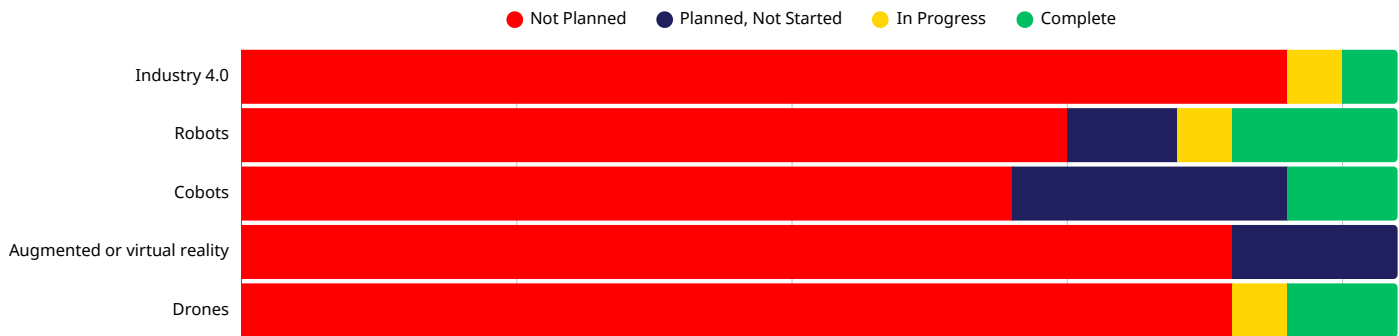


Figure 29. Has your business, or the business you work for, invested in advanced welding technology?

SUSTAINABILITY AND CORPORATE RESPONSIBILITY

Sustainability continues to be a growing area of focus for the welding industry. The survey results indicate that many businesses are acting, but often due to practical, cost-saving initiatives rather than major decarbonisation investments.



Sustainability Investment Is Steady, But Government Support Is Lacking

Support for the Federal Government’s Climate Change Bills was more divided in 2026 than in 2024. In 2024, 69% of respondents supported the Bills. In 2026, support is lower, with 45.5% supporting government action.

However, there is strong agreement that government is not doing enough to help industry transition to net zero. In 2026, 73.3% of respondents said the government is not doing enough, compared with 66% in 2024. This suggests that while industry views on national climate policy may be mixed, there is broad agreement that practical assistance for manufacturers is insufficient.

Current sustainability actions show businesses are continuing to invest where practical (see Figure 30):

- Implementation of LED or sensor lighting (72%; down from 74% in 2024; and from 80% in 2023)
- Waste reduction programs (71%; down from 76% in 2024; and from 78% in 2023)
- Recycling, upcycling and repurposing programs (73%; up from 70% in 2024; down from 75% in 2023)
- Digital transformation (72%; down from 64% in 2024; and down from 73% in 2023)
- Water use reduction (42%; down from 65% in 2024; down from 60% in 2023)
- Installation of solar panels (61%; up from 53% in 2024; up from 60% in 2023)
- Purchasing electric or hybrid vehicles (42%; up from 35% in 2024; up from 39% in 2023)

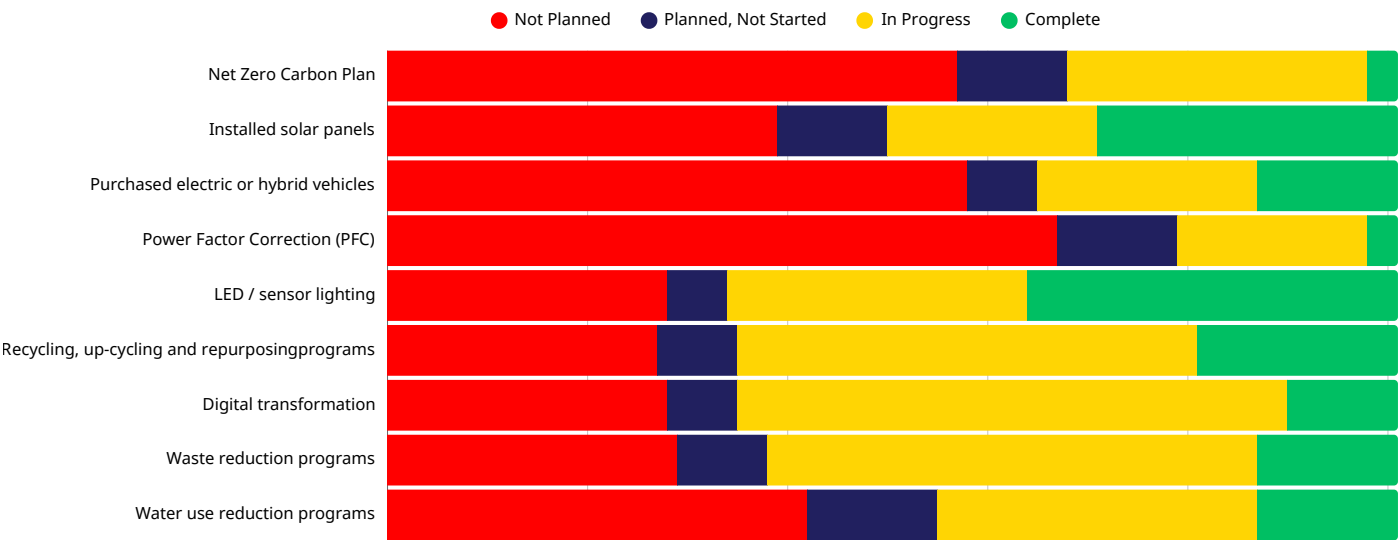


Figure 30. Has your business, or the business you work for, invested in any sustainability initiatives?



SUSTAINABILITY AND CORPORATE RESPONSIBILITY

Businesses continue to invest in social and workforce initiatives.

Measures that the welding industry has planned, in progress or completed include (see Figure 31):

- Employee wellbeing programs (73%; down from 76% in 2024; down from 80% in 2023)
- Opportunities for women (75%; down from 76% in 2024; down from 81% in 2023)
- Mental health and fitness programs (73%; down from 75% in 2024; down from 79% in 2023)
- Opportunities for apprentices and trainees (78%; up from 71% in 2024; down from 81% in 2023)
- Diversity and inclusion initiatives (67%; down from 69% in 2024; down from 74% in 2023)
- Modern Slavery Act initiatives (60%; up from 59% in 2024; up from 52% in 2023)
- Implementing a Reconciliation Action Plan (51%; up from 48% in 2024; down from 53% in 2023)

These results are broadly consistent with 2024, when corporate responsibility initiatives remained strong despite cost pressures.

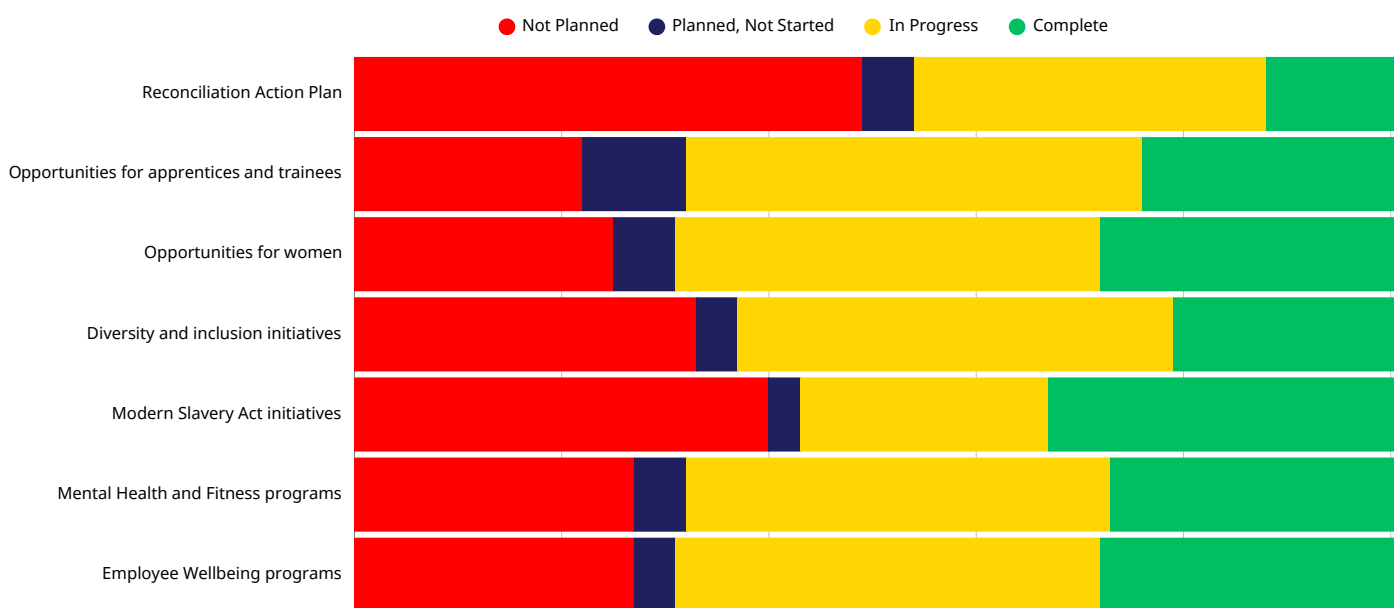


Figure 31. Has your business, or the business you work for, invested in any corporate responsibility initiatives?

POLICY IMPLICATIONS



The 2026 Industry and Workforce Outlook Survey confirms that Australia's welding and fabrication industry is at a turning point.

The industry has capability. It has workshops ready to work. It has appetite for training, technology and process improvement. It sees opportunity in local manufacturing, renewable energy infrastructure, defence, major projects and advanced manufacturing. But it also faces significant risks.

Short work pipelines, rising costs, imported fabricated steel, skills shortages, weak apprenticeship attraction, slow technology adoption and inconsistent enforcement of Australian Standards are limiting growth and investment.

The policy implications are clear:

- Governments must strengthen local content procurement.
- Imported fabricated steel must be independently verified to Australian Standards.
- Workforce and apprenticeship pathways must be reformed and promoted.
- TAFEs and training providers need stronger support.
- Advanced manufacturing adoption must be made practical for SMEs.
- Women, Indigenous Australians, school students and non-traditional talent pools must be actively supported into welding careers.
- Compliance must be treated as a productivity and safety issue, not red tape.

The message from industry is clear. Australian welding and fabrication businesses are not asking for special treatment. They are asking for fair competition, enforceable standards, access to work, and support to build the workforce and technology capability Australia needs.

If governments are serious about sovereign capability, infrastructure delivery and a Future Made in Australia, they must start with the people and businesses that fabricate the steel on which our economy is built.



ABOUT WELD AUSTRALIA

Weld Australia is the peak body representing welding in Australia. Our mission is to 'facilitate the growth of world class welding in Australia'. Members are made up of individual welding professionals and companies. Weld Australia corporate members include power generators, defence primes, road authorities, fabricators, universities, research institutions and TAFE. They are involved in almost every facet of Australian industry and make a significant contribution to the economy. Weld Australia is the Australian representative member of the International Institute of Welding (IIW).

