



Deal *Pulse*

Queensland M&A
Stay and play





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Introduction

Pitcher Partners is pleased to present our Deal Pulse ‘Stay and play’ analysing Queensland Mergers & Acquisitions (M&A) over the 2025 calendar year. This report presents research findings including key transactions and sector trends.

Deal Pulse focuses on Queensland M&A activity being:

- Acquisitions by Queensland based private and public corporate entities of local, interstate and offshore ventures; and
- Divestments of Queensland based ventures to local, interstate and offshore entities and private equity funds.

Transaction values are included in this report to the extent that deal values have been publicly disclosed.

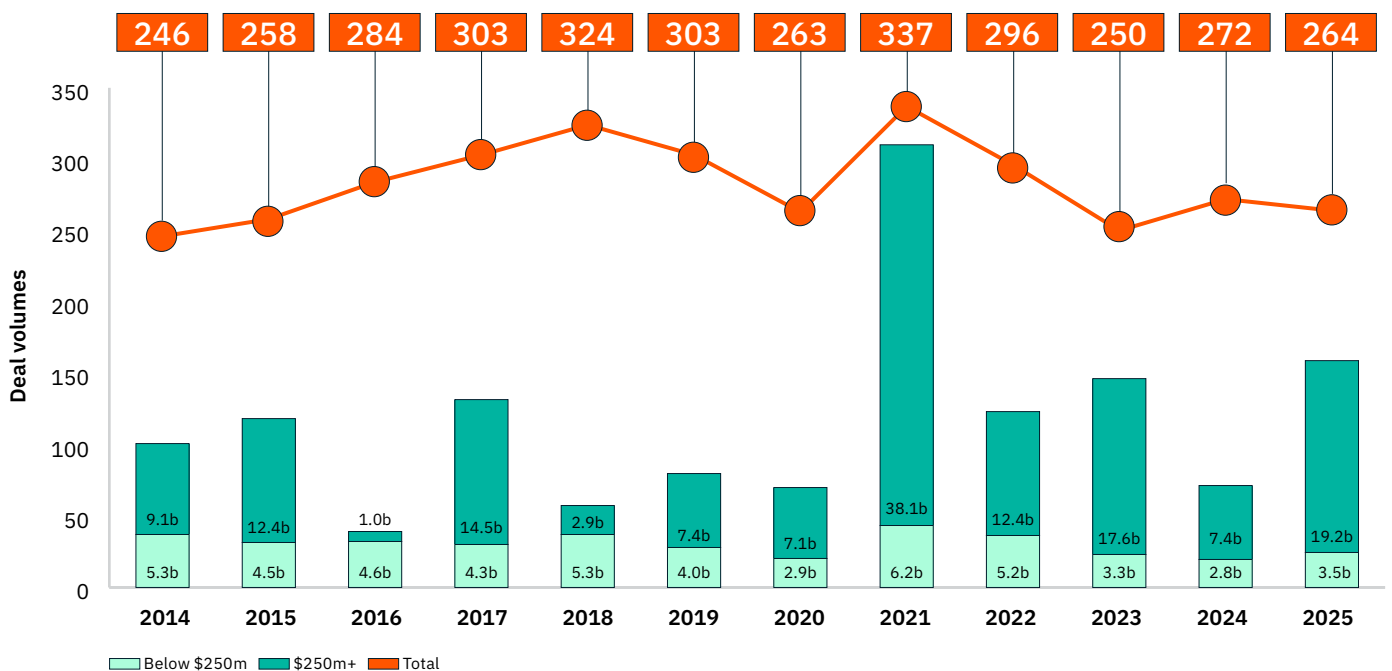
Queensland recorded 264 M&A transactions in 2025, slightly down from 272 deals in 2024, with activity remaining strongest in industries tied to the state’s rapidly growing population.

Over the past year, Queensland has seen consistent deal flow across population–and accommodation-linked assets, including student and retirement living, regional holiday parks and hotels and pubs. These businesses continue to play a vital role in supporting where Queenslanders choose to live, stay, and play.

Looking ahead, 2025 created a market environment that is actively building the physical and commercial foundations for Queensland’s next phase of growth – setting the stage for renewed deal momentum.



Number of deals and total deal values by year



264
Deals announced

3%
on 2024 (272 deals)

Largest deal:
National Storage REIT
(ASX:NSR)

\$9.3b

Most active:
Technology, media
& telecoms

50
acquisitions

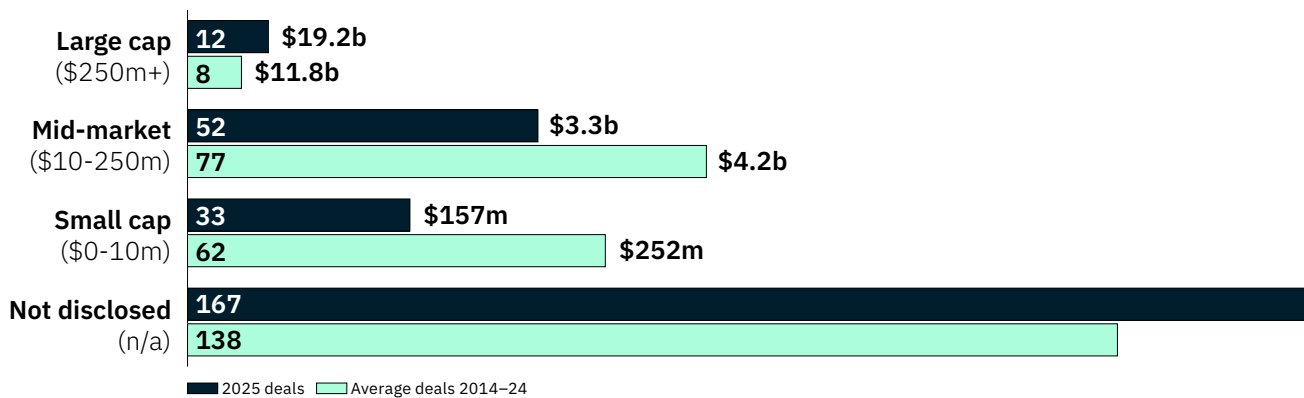
Is QLD selling
or buying?

Selling 10% 202

Buying 27% 104

QLD buyer & seller (42)
264

Queensland market breakdown by size



Key observations and trends observed included:

- **Leisure:** the 21 deals recorded in 2025 reflected a return to a more normal level of activity after a quiet 2024 as Pubs, Travel and Tour operators attracted the attention of both Queensland-based and interstate investors.
- **Real estate:** transactions involving niche accommodation providers servicing retirement, student and resource industries lifted the number of deals in Real estate to its highest level since 2018.
- **In-bound deal activity at record levels:** global businesses have increased their preference for Queensland-based targets, acquiring 67 businesses in 2025 (the highest over the 12 years of Deal Pulse).
- **Fall in acquisitions by Queensland buyers:** 2025 saw a notable fall in acquisitions made by Queensland businesses with 104 deals, the lowest over the previous 11 years of Deal Pulse.

- **Private Equity lifting volumes:** Private equity increased their activity during 2025 completing 15 direct acquisitions (the highest since 2020). Sectors which attracted the most attention were Consumer (5 deals) and Technology, media & telecoms (4 deals).

We trust this report provides valuable insights. Should you wish to understand the opportunities for M&A in your sector or to discuss strategic succession planning, we look forward to hearing from you.

Warwick Face
Partner in Charge –
Corporate Finance

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Sectors *summary*



Technology, media and telecommunications

2024	2025
48	50
Deals	Deals
Total value \$717m	Total value \$818m
from 13 deals	from 13 deals



Consumer

2024	2025
28	30
Deals	Deals
Total value \$160m	Total value \$295m
from 10 deals	from 8 deals



Energy, mining and utilities

2024	2025
41	26
Deals	Deals
Total value \$3,184m	Total value \$3,452m
from 26 deals	from 16 deals



Industrials and chemicals

2024	2025
36	25
Deals	Deals
Total value \$587m	Total value \$167m
from 9 deals	from 7 deals



Construction

2024	2025
22	24
Deals	Deals
Total value \$157m	Total value \$316m
from 5 deals	from 7 deals



Leisure

2024	2025
13	21
Deals	Deals
Total value \$130m	Total value \$882m
from 3 deals	from 10 deals



Pharma, medical and biotech

2024	2025
14	20
Deals	Deals
Total value \$454m	Total value \$1,085m
from 6 deals	from 7 deals



Financial services

2024	2025
13	18
Deals	Deals
Total value \$869m	Total value \$889m
from 5 deals	from 6 deals



Business services

2024	2025
31	16
Deals	Deals
Total value \$203m	Total value \$147m
from 11 deals	from 6 deals



Real estate

2024	2025
8	15
Deals	Deals
Total value \$1,037m	Total value \$11,210m
from 4 deals	from 11 deals



Transport

2024	2025
12	10
Deals	Deals
Total value \$2,274m	Total value \$3,365m
from 3 deals	from 3 deals

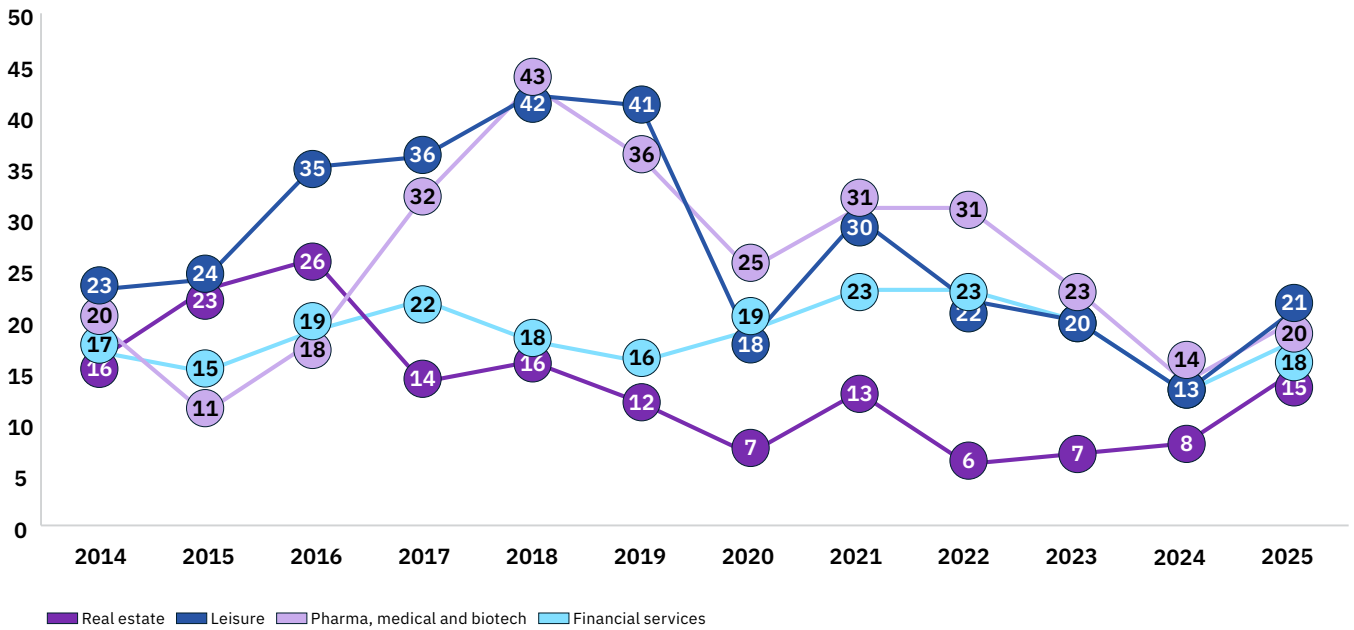


Agriculture

2024	2025
6	9
Deals	Deals
Total value \$455m	Total value \$80m
from 6 deals	from 3 deals

Sectors *trending up*

M&A deal volumes



Real estate

Real estate continued its upward trend with 15 deals in 2025, showing increased momentum and investor confidence across storage and accommodation subsectors.

Accommodation-linked assets drove sector activity with 7 deals followed by Storage (2 deals) and Retirement (2 deals).



Leisure

Leisure sector rose from 13 in 2024 to 21, reflecting strong market momentum across travel, hospitality and entertainment.

Deal activity in the Pub sector was at record levels (6 deals), Travel (6 deals), and Tourism (2 deals) businesses were also well-sought after.



Pharma, medical and biotech

M&A in the Pharma, medical and biotech sector increased from 14 to 20 deals, with strong activity across a variety of subsectors.

Deal flow was led by Day Hospitals, Medical Imaging and Health Care Distributors (all with 3 deals each).



Financial services

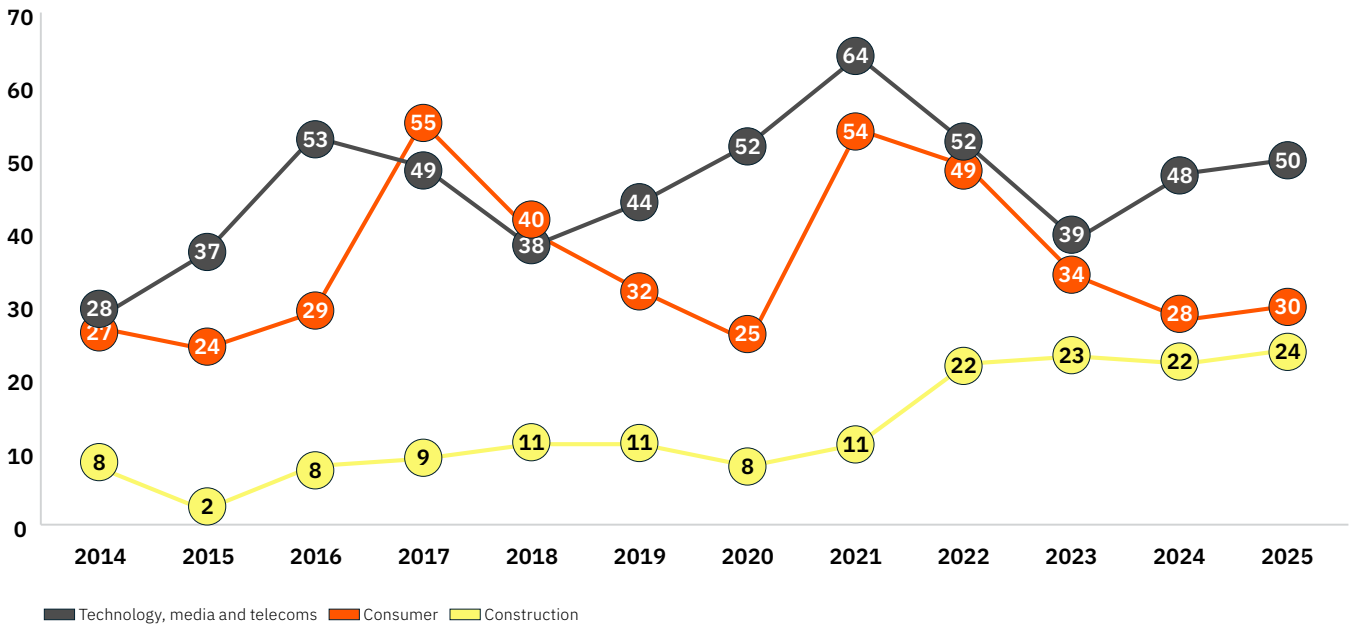
Financial services increased from 13 to 18 deals, signalling steady growth across insurance, banking, and advisory segments.

Subsectors seeing significant activity included Wealth Management (4 deals), Insurance Brokers and Superannuation (3 deals) and Cryptocurrency (2 deals).



Sectors *strong and steady* ⇄

M&A deal volumes



Technology, media and telecoms

Technology, media, and telecommunications deal activity remained strong in 2025, with 50 transactions highlighting sustained sector growth and innovation.

M&A activity increased from previous years across FinTech (3 deals), ICT & Managed Services (6 deals), Recycling (2 deals) and Health & Sport applications (2 deals).



Consumer

Consumer sector deal activity maintained its level of activity in line with previous years with 30 transactions.

Automotive Retail and Education Services (both 5 deals) and Pet Products and Services (2 deals) saw the largest increases in activity across subsectors.



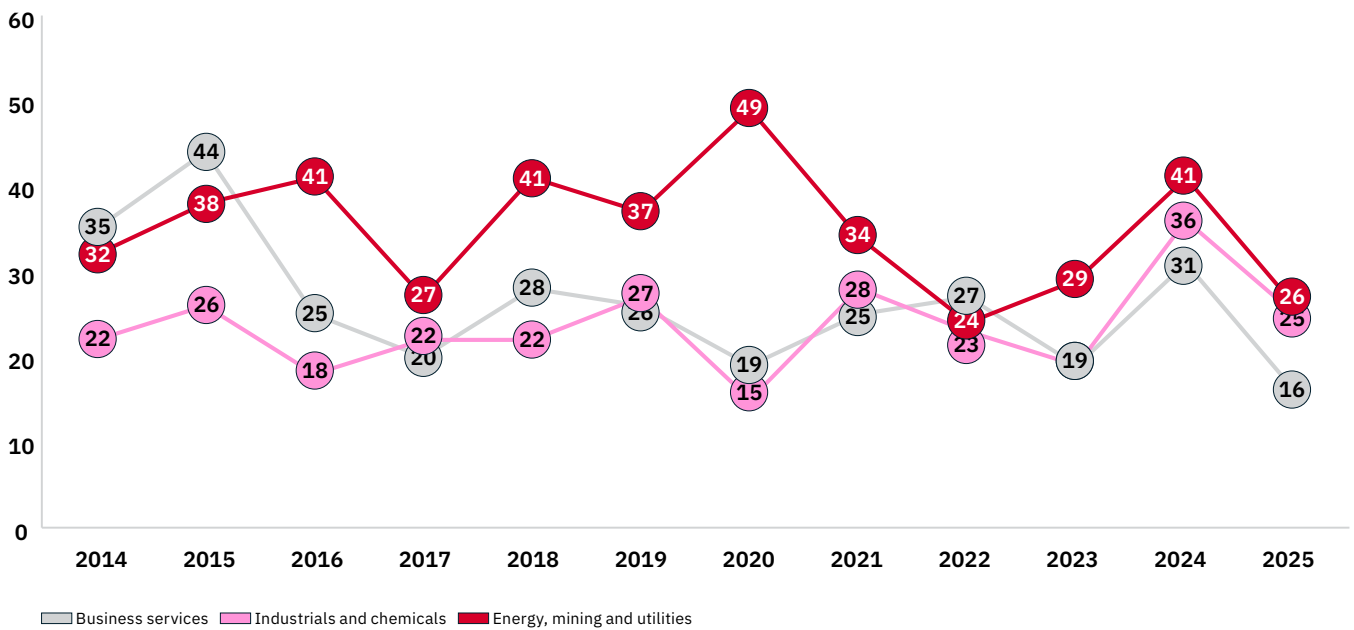
Construction

The Construction sector recorded 24 deals in 2025, with active consolidation across engineering, environmental consulting and construction services.

Pitcher Partners advised All Energy Contracting on their sale to OCU Group for \$192 million, underscoring investor appetite for energy-focused construction operations. The most active subsectors were Engineering (6 deals) and Construction services and Environmental consulting (both 4 deals).

Sectors *trending down*

M&A deal volumes



Business services

Business Services recorded just 16 transactions in 2025, down from 31 in 2024 which saw more activity in Business Consulting, Office Services and Supplies.

The standout deal was Tasma Limited's \$61m acquisition of WorkPac, highlighting continued interest in the Staffing solutions subsector (3 deals). Activity also picked up in Training Services (2 deals) as organisations sought to strengthen workforce productivity.



Industrials and chemicals

After a record level of dealmaking in 2024 driven by deals in Industrial Machinery and Power, Batteries & Charging, the Industrials sector saw activity ease to 25 transactions in 2025.

Despite the overall slowdown, several subsectors continued to attract strong investor interest, including Industrial Products (4 deals), Packaging (3 deals) and Chemicals (2 deals).



Energy, mining and utilities

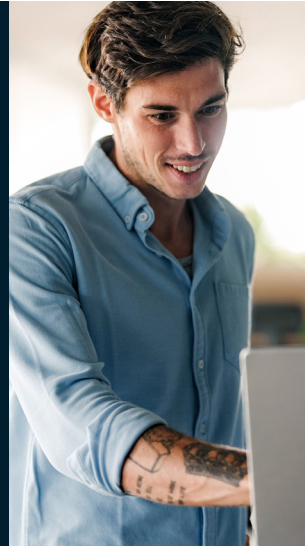
Deal activity in the Energy, mining and utilities sector fell to 26 transactions in 2025, down from 41 in 2024, with most subsectors experiencing a slowdown. Gold (4 deals) and Renewable Energy (3 deals) were notable exceptions, both posting increased activity.

A notable transaction was European market leader FairWind's purchase of wind installation and maintenance provider Cosmic Group.



1

Technology, media and telecommunications



Where software scales

The TMT sector again led Queensland M&A as one of the most active categories in Deal Pulse. Deal volumes increased from 48 in 2024 to 50 in 2025, underpinned by capability-led consolidation across Application Software, Cloud Solutions and Cybersecurity.

Application Software was the most active subsector with 13 transactions. Activity spanned vertical SaaS and workflow/productivity tools, with both global strategics and PE-backed platforms acquiring Queensland-born assets.

Notable transactions included:

- **Felix Group Holdings** (ASX:FLX) acquired **Nexvia** for \$12m, a leading project management software platform for construction SMEs.
- Canadian-based Clara Technologies Corp. completed the acquisition of **Hunter Sales Co** which runs Sales Buddi, a sales coaching platform and application that uses artificial intelligence (AI) to refine the techniques of sales professionals to tailor client needs.

Cloud adoption and data infrastructure demand remained strong, with buyers combining capabilities to bolster their market.

- **Megaport** (ASX:MP1) acquired Latitude.sh for \$453m to integrate its computer-as-a-service platform directly into Megaport's global network fabric, creating a unified infrastructure layer.
- Global clean energy investment firm United H2 acquired **Oper8 Global** for \$50m through its subsidiary VIRIDIS Green Data Centres, strengthening its position in the data centre market.
- **Entag Holding** acquired **Proactive Technology Solutions** to boost its capabilities in physical security practice and combine cloud-managed security, access control and surveillance into its existing IT managed services.

Cybersecurity and AI capability continued to attract local and international buyers:

- 5G Networks (ASX:5GN) acquired a controlling stake in **AUCyber** (ASX:CYB) through a takeover bid for \$20m, combining AUCyber's security expertise with 5GN's nationwide network of data centres.
- Searchlight Cyber LLC acquired **Assetnote**, a Brisbane-based attack-surface management (ASM) provider, integrating its ASM solution with Searchlight's dark web intelligence to strengthen proactive cyber-attack prevention.
- US-based advanced video technology group SightLine Applications acquired Brisbane's **Athena AI**, a specialist in AI-enabled computer vision and decision support for the military.

2024		2025
48		50
Deals		Deals
Total value \$717m		Total value \$818m
from 13 deals		from 13 deals

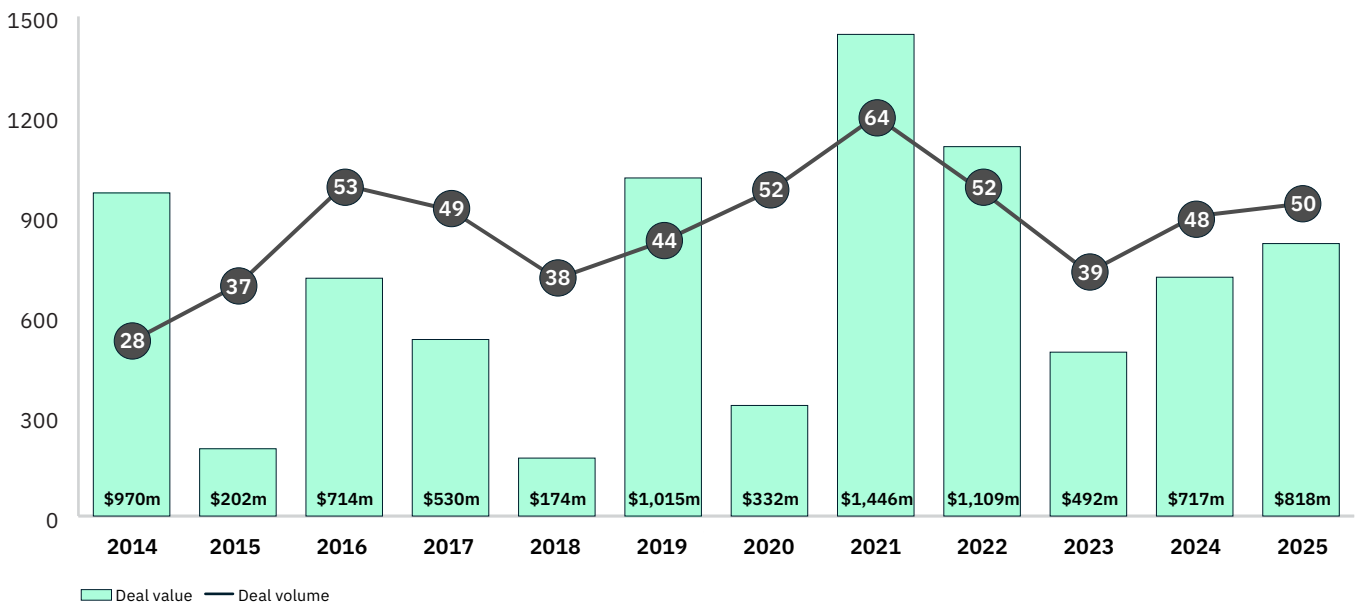


We've long admired what the Nexvia team has achieved. Their platform complements ours perfectly, extending our reach to SMEs and strengthening the value we can deliver to the entire construction ecosystem.

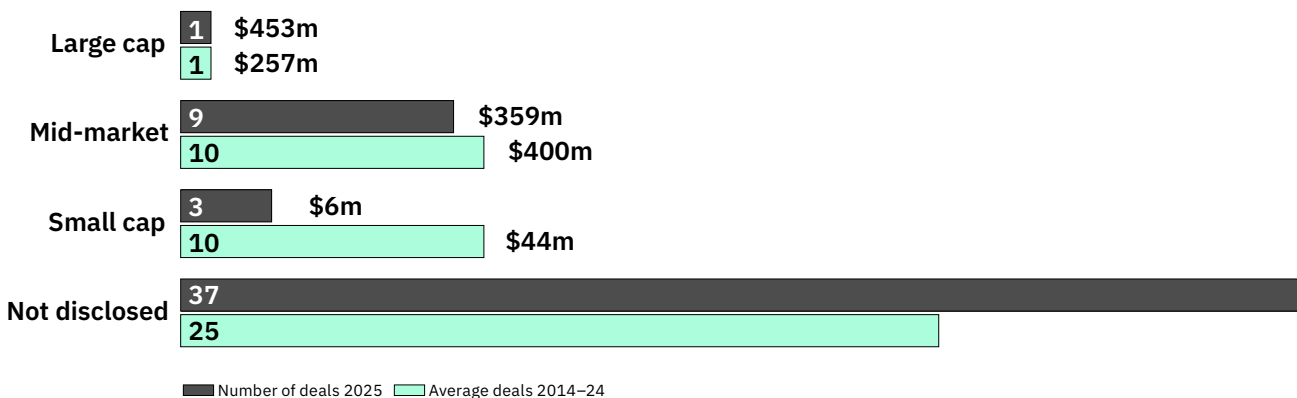
Mike Davis, Co-Founder and CEO – Felix Group



TMT deal volume and value breakdown by year



TMT deal volume and values by size





2

Consumer



Shift into gear

Deal activity in the Consumer sector held firm with deal volume increased from 28 in 2024 to 30 in 2025. Buyers favour scalable retail platforms including automotive retail, education services and resilient food categories.

Deal flow for automotive retail subsector reflected groups consolidating metropolitan footprints and brand portfolios to lift throughput and aftersales capture. Larger dealer platforms continued to seek scale and operating leverage through small, strategic acquisitions.

- **Eagers Automotive** (ASX:APE) acquired Brisbane-based **Norris Motor Group** for \$170m as part of its 'Next100' strategy to strengthen its leadership in key Australian markets, particularly in Queensland.
- Toyota Tsusho (Australasia) Pty Ltd acquired **MCT Automotive Group**, an online car buying company and undercover car sales warehouse.
- **Volvo Group Australia's** acquisition of Truck Centre (WA) consolidates the business under the Volvo trucks banner.

Private operators and sponsors added capacity across training and K-12, with transactions balancing continuity of service, governance uplift and multi-campus scale-up. Notable deals in the education services include:

- **Christian Community Ministries** paid \$30m for the troubled Brindabella Christian College following the school's collapse into voluntary administration in March 2025.
- **Tenkate Training School** acquired **Churchill Education** for \$4m to expand its service offerings and broaden their reach in the Australian VET sector, combining expertise in formal training with skills recognition.
- **Growth Story Capital** completed an investment in **Euka Future Learning**, following the significant increase of online, flexible and curriculum-aligned homeschooling education.

Food assets with route-to-market strength and private-label capability remained attractive. Pet services continues to outperform general discretionary, with manufacturers and clinics drawing strategic buyers seeking vertical integration and scale.

- **Alvia Asset Partners** acquired a majority stake in Altimate Foods for \$15m, with rising consumer desire for Australia's ice cream market which has doubled in value since 2012.
- Leveraging **Earlee Product's** expertise in supplying key ingredients to major food companies, Ord Minnett's investment would unlock domestic and international market opportunities for Earlee's science-driven food solutions.
- EBOS' \$43m acquisition of **Next Generation Pet Foods** fits into the Group's strategy of targeted growth through high-value additions to its animal care portfolio.

2024		2025
28		30
Deals		Deals
Total value \$160m		Total value \$295m
from 10 deals		from 8 deals

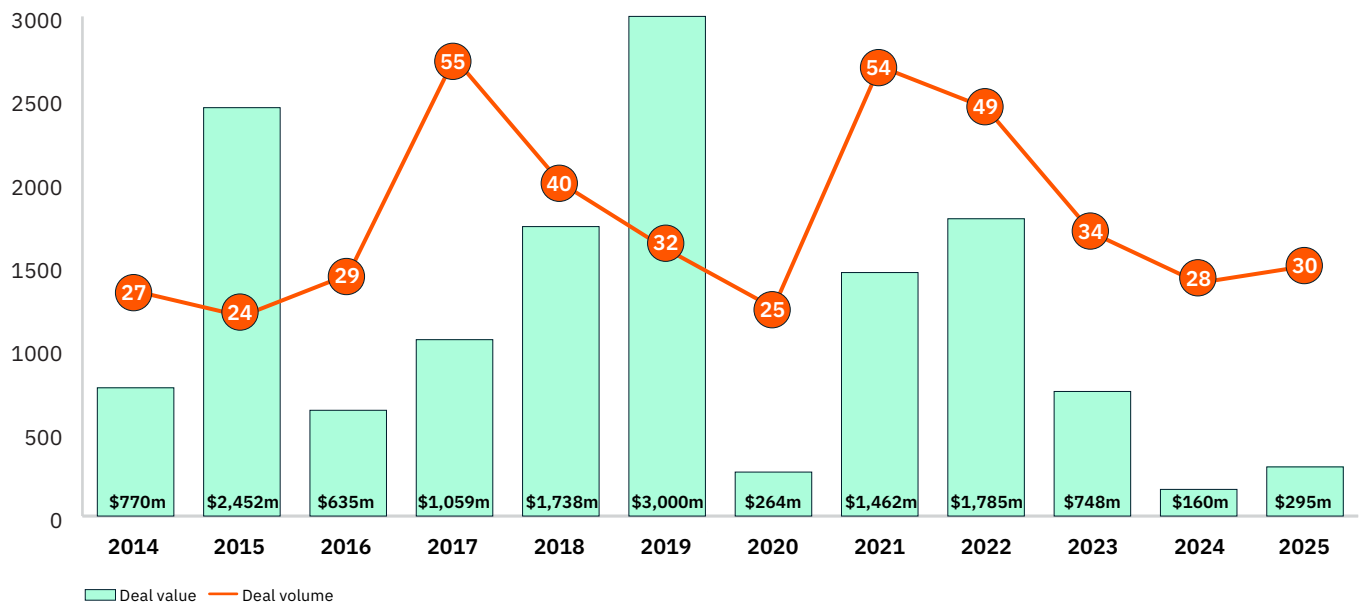


Altimate typifies much of our investment strategy as a business with fantastic market position, high quality and great value products, and a first-class management and founder team.

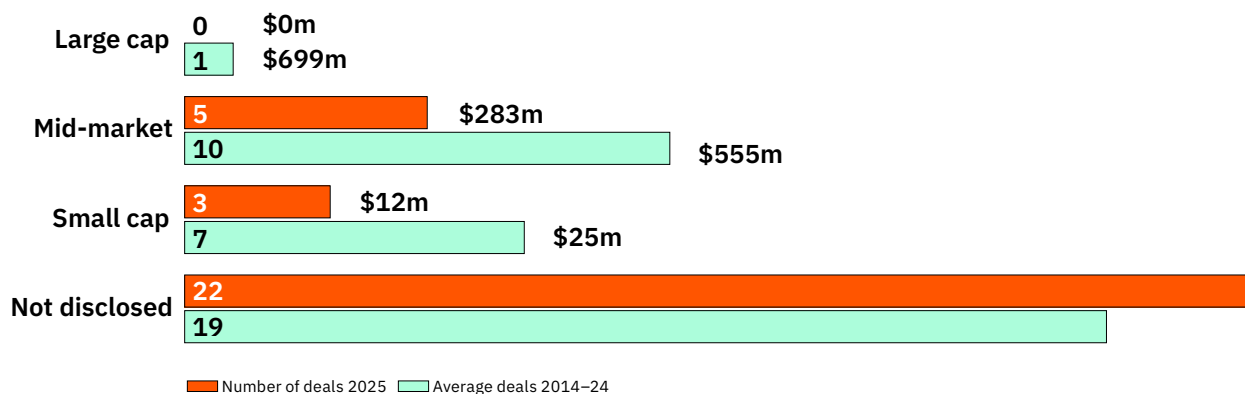
David Browne, Alvia Private Capital



Consumer deal volume and value breakdown by year



Consumer deal volume and values by size





3

Leisure



Raising the bar

After several years of steady post-pandemic recovery, Queensland’s Leisure sector entered 2025 with renewed momentum, driven largely by heightened activity across Pub and hotel-adjacent assets. Confidence has strengthened as operators reposition for sustained domestic tourism demand, shifting regional demographics, and growing interest in community-focused hospitality venues.

Pubs were by far the most active subsector in 2025, accounting for the largest share of transaction volume across the Leisure category.

- Pitcher Partners’ client, **Eumundi Group**, was taken off market by SEQ Hospitality Group, which later expanded further with its acquisition of Queensland’s iconic **Caxton Hotel**.
- Vinta Group added three more regional venues to its Waymark Hotel Group portfolio, purchasing the **Mill Inn and Sundowner Hotel** (Millmerran), **Birdcage Hotel** (Longreach) and **Country Club Hotel Motel** (Stanthorpe).
- **Star Group**, one of Queensland’s largest privately owned pub groups, acquired the **Parkhurst Tavern** (Rockhampton) for \$24 million.

Helloworld Travel (ASX: HLO) acquired the remaining interest in Gold Coast-based travel agency **Mobile Travel Agents Australia (MTA)**. Other tourism related transactions included:

- **Star Entertainment** sold its 50% share of the **Queen’s Wharf** precinct joint venture to Far East Consortium for \$243m.
- **Flight Centre** rationalised its portfolio by divesting Cross Hotels to South Korea’s Sono International while expanding its cruise offering through the acquisition of UK based Iglu.com.
- **Lake Tinaroo Holiday Park** was acquired by Discovery Holiday Parks.
- Journey Beyond added Far North Queensland’s **Moreton Telegraph Station** and **Sailaway Port Douglas** to its tourism asset portfolio.

Niche leisure transactions included:

- **Jumbo Interactive’s** \$110m acquisition of UK-based Dream Car Giveaways, highlighting the growing convergence between leisure, digital engagement and prize-based competition models.
- Queensland-based **Altor Private Equity** made two sports entertainment investments, acquiring majority stakes in the Tasmania JackJumpers and Tickford Racing.
- Betr Entertainment acquired **TopSport** from the Merlehan family in a deal reported to be worth \$10m.

2024		2025
13		21
Deals		Deals
Total value \$130m from 3 deals		Total value \$882m from 10 deals

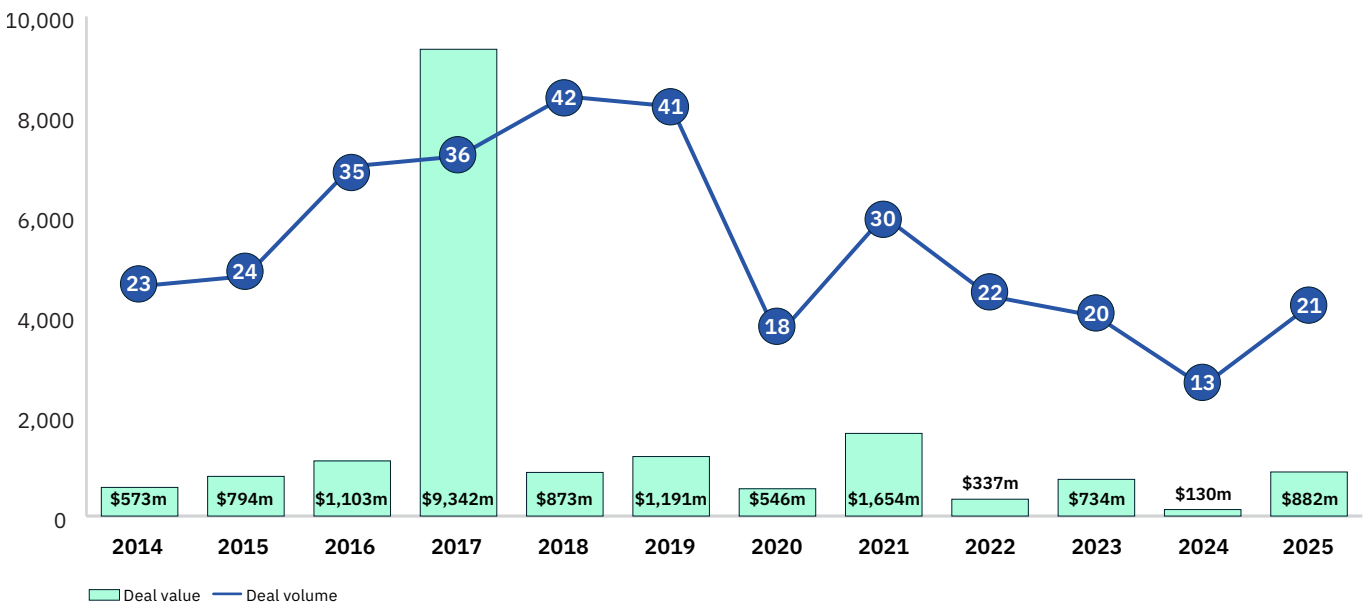


Jumbo's two decades of B2C success in Australia and its world-class software, marketing and customer management expertise, provides DCG with the foundation to continue its already impressive growth.

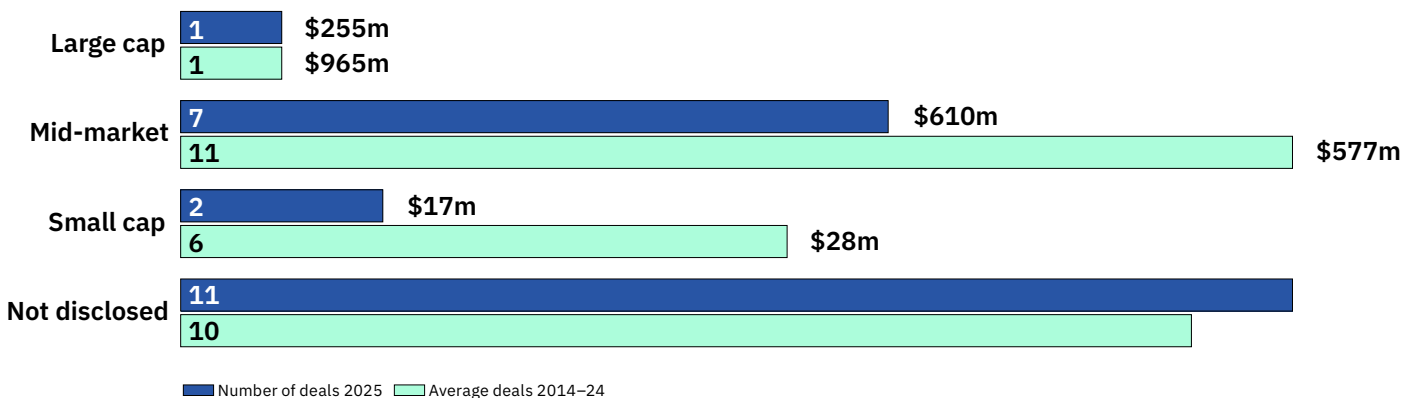
Mike Veverka, Founder, Executive Director and CEO – Jumbo Interactive



Leisure deal volume and value breakdown by year



Leisure deal volume and values by size





4

Pharma, medical *and biotech*



Deals are checking in

Pharma, medical and biotech deals accelerated with deal volumes up over 42% to 20 transactions. This activity was seen across a wide variety of subsectors ranging from day hospitals, health care distribution platforms, medical imaging and tech-enabled care, reflecting patient throughput, network scale and leverage.

Day hospitals remained in focus as investors pursued short-stay capacity close to population corridors, underpinned by predictable case-mix and specialist rosters.

- RAM Essential Services Property Fund (ASX:REP) acquired **Cairns Day Surgery** for \$23m to pivot towards a healthcare focus, expand its relationship with Ramsay Health Care, and reposition its portfolio away from retail towards resilient, essential services.
- **Day Hospital Partners** acquired Tweed Day Surgery from Healthscope as part of a strategic expansion of their specialized, independent day surgery network and meet the increasing demand for short-stay surgeries in regional locations.
- Queensland-based **Cura Day Hospitals Group** acquired Seaford Day Surgery to expand its network in South Australia, gain a high-quality facility with strong physician alignment, and enhance its market leadership in a growing day surgery sector

Pitcher Partners advised **Mediquip Holdings** on their acquisition of **Bosco Medical**. Other acquisitions by Mediquip include Innovative Medical Solutions and James Optronics as part of their strategic initiative to scale its national footprint.

Other health care deals include:

- PE-owned Device Technologies acquired **ActivTec Solutions** to expand its service footprint and capabilities in crucial healthcare areas like aged care, hospitals, and disability services.
- Healthcare Australia acquired **First Choice Care and Edmen Community Staffing Solutions** from **PeopleIN** (ASX:PPE) for \$20m.

Across medical imaging, medical centres and health care technology, scale players widened their networks, balancing capacity, service breadth and geographic coverage.

- Healius sold **Lumus Imaging** to Affinity Equity Partners for \$965m to refocus on its core pathology business. Affinity's acquisition marks its entry into healthcare services.
- Vitura Health (ASX: VIT) acquired **Livelihood Health**, the parent company of the Candor Medical telehealth platform for \$6m.
- Partnered Health acquired **Health Hub Doctors Morayfield** and **Woorim** expanding its integrated healthcare model and strengthening its regional presence.

2024		2025
14		20
Deals		Deals
Total value \$454m from 6 deals		Total value \$1,085m from 7 deals

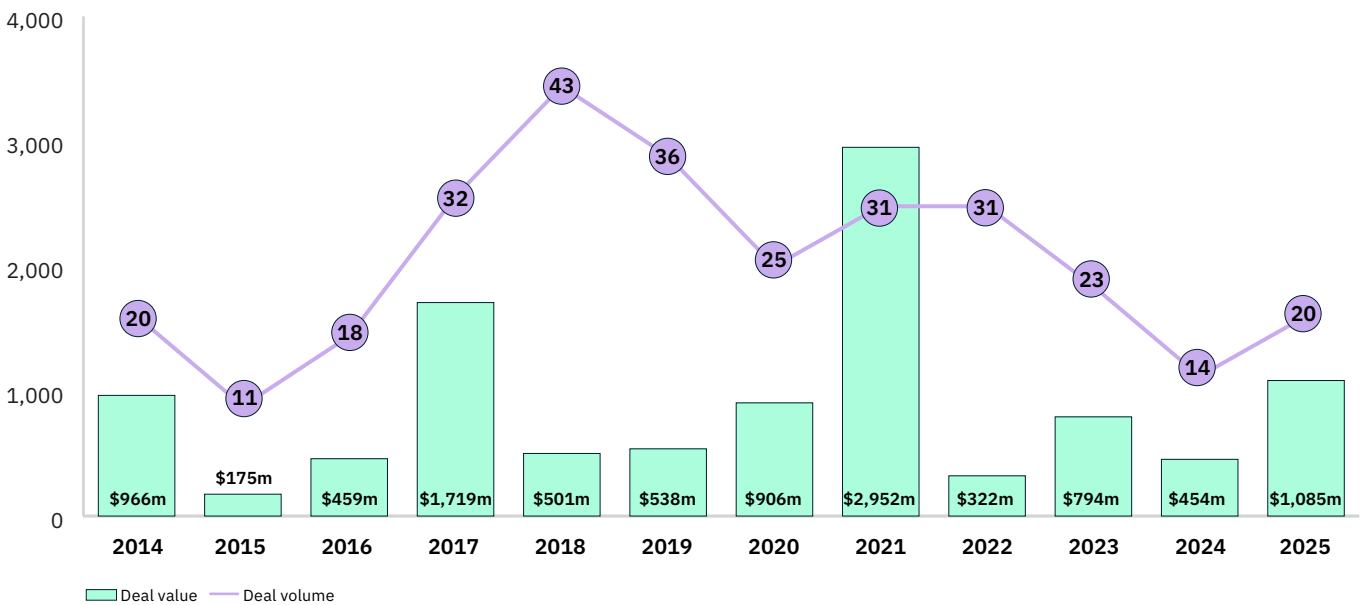


These acquisitions are a major step in scaling our business to support more customers with more solutions. Our goal is to help our healthcare and veterinary partners achieve greater efficiencies, deliver better clinical outcomes, and provide outstanding after-sales support.

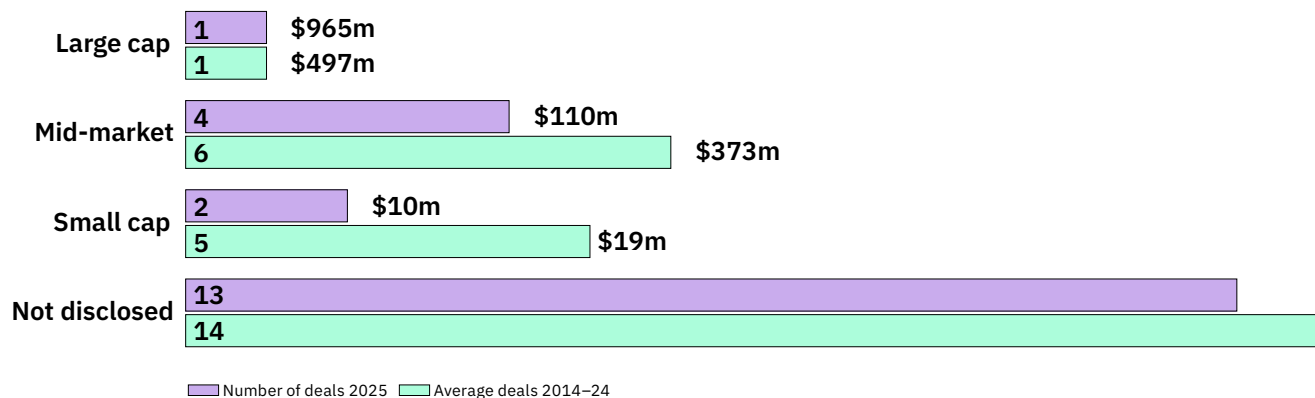
Daniel Berndt, CEO – Mediquip



Pharma, medical and biotech deal volume and value breakdown by year



Pharma, medical and biotech deal volume and values by size





5

Real estate



Sheltering strong demand

Queensland’s Real estate sector showed solid momentum through 2025, underpinned by strong demand for accommodation-based assets, continued consolidation in storage facilities and heightened investor interest in retirement living portfolios.

Accommodation-focused transactions dominated Real estate deal flow in 2025, reflecting ongoing confidence in specialised residential and accommodation assets.

- **Eureka Group Holdings** expanded its footprint in the affordable all-age rental market, acquiring multiple accommodation villages including Benalla Tourist Park, Hillside Garden Village, **Barrier Reef Tourist Park**, Tuggerah Shores Home Village, and a mixed-use **residential/caravan park** in Gladstone.
- Student-accommodation provider **UniLodge** was sold to Japan-based developer and fund manager Samty Holdings in a reported deal worth \$600 million.
- Civeo Corporation (NYSE:CVEO) acquired 1,340 rooms across **four villages in the Bowen Basin** for \$105 million, highlighting sustained demand for accommodation tied to resource-sector workforce needs.

Retirement living assets also recorded meaningful activity:

- **RetireAustralia** was acquired by Invesco Advisers for \$845m, reflecting strong global confidence in long-term, needs-based residential communities.
- Regis Healthcare purchased aged care operator **Rockpool** in a reported \$135m deal, continuing consolidation as operators seek scale and operational efficiencies.

M&A activity in the storage subsector continues to benefit from strong population growth and evolving household storage needs.

- Brookfield Office Properties and GIC Investment (Australia) acquired **National Storage** in a transaction valued at more than \$9bn, marking one of the largest real estate deals of the year and underscoring international appetite for stable, income-producing storage assets.
- Contactless self-storage operator **Swift Storage** sold a majority stake to global investment manager Barings for \$200 million.
- BlackRock invested in **StoreLocal**, reinforcing storage as a resilient, scale ready asset class.

2024		2025
8		15
Deals		Deals
Total value \$1,037m from 4 deals		Total value \$11,210m from 11 deals

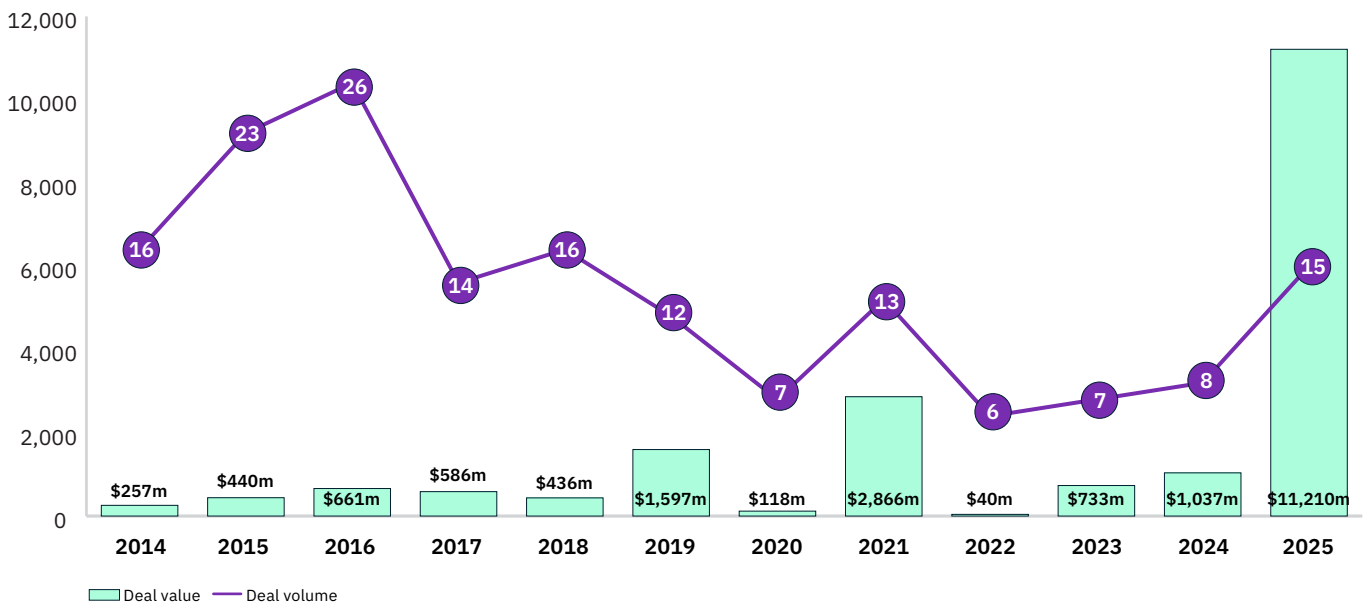


We are excited to announce the acquisition of Rockpool, a highly regarded provider of residential aged care services in Queensland. This acquisition aligns with our strategy to broaden our residential aged care footprint through the acquisition of premium homes.

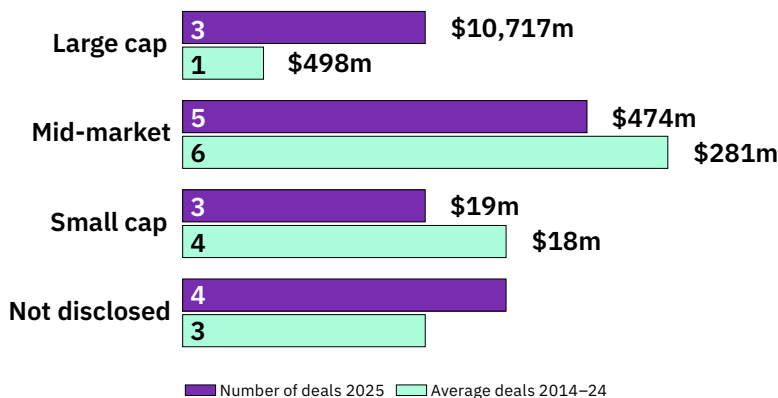
Dr Linda Mellors, Managing Director and CEO – Regis Healthcare



Real estate deal volume and value breakdown by year



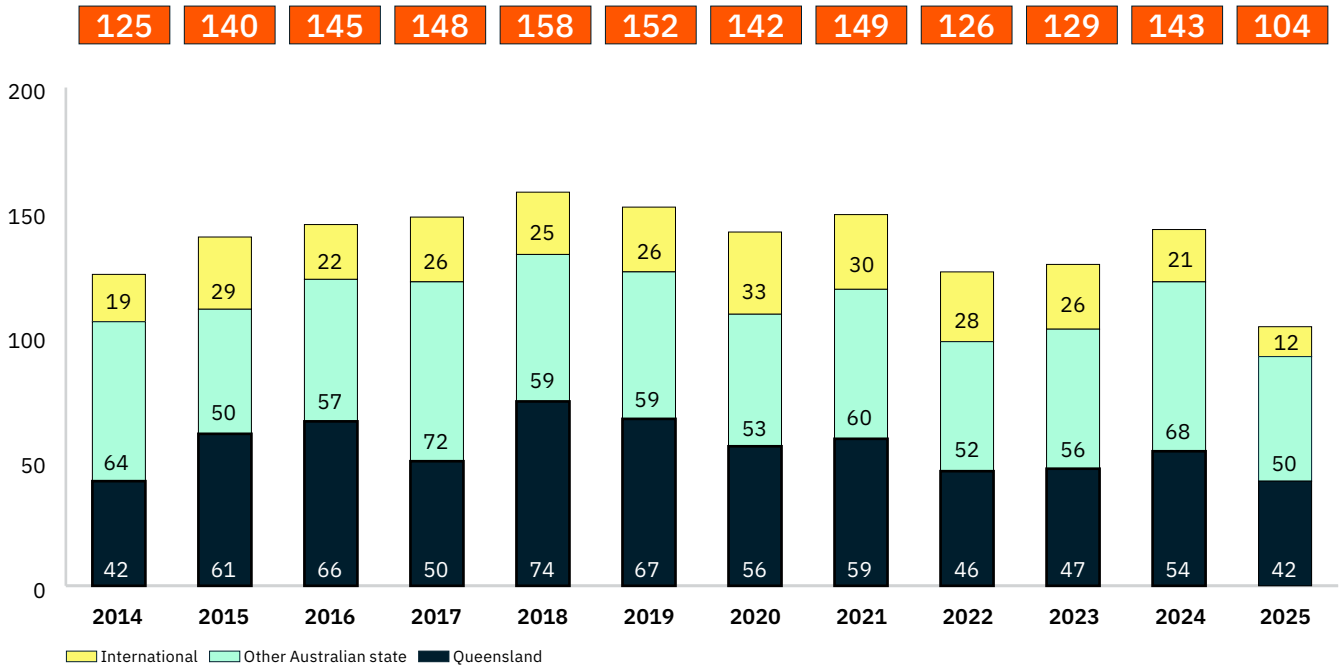
Real estate deal volume and values by size





Geographic spread

Where do Queensland businesses like to buy?



Queensland businesses executed 104 acquisitions in 2025, a decrease of 39 deals (-27%) from the previous year, falling below the 12-year average of 138 acquisitions. This sentiment was broad-based however most notable was the decline in outbound acquisition activity and the drop in interstate acquisitions.



Queensland companies completed 12 international acquisitions, a decline relative to the average of 26 deals over the previous 11 years. Despite this pullback, notable transactions include Megaport's purchase of Latitude.sh (Brazil) and Flight Centre's acquisition of Iglu.com.

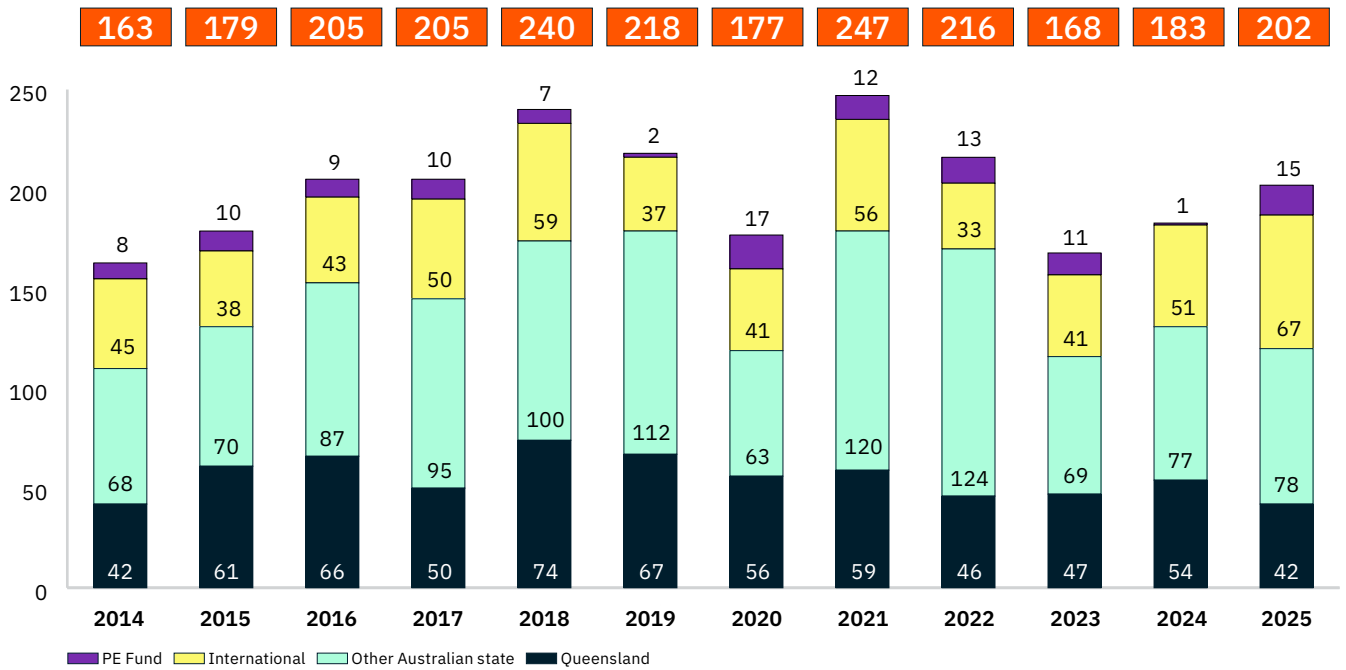


Interstate targets of 50 marks a moderation from prior years for Queensland buyers. Even so, interstate deals remained the largest component of 2025 activity. Notable deals included Eureka's multiple accommodation village acquisitions and Swyftx acquisition of Melbourne-based brokerage Caleb & Brown Holdings.



Capturing nearby market share, consolidating fragmented segments and deepening vertical service integration within the state have been the overall theme for in-state local acquisitions. ARCC Gold Coast acquired Phoenix Power Recyclers' organics facility in Yatala for \$90m and Eagers Automotive acquired Norris Motor Group.

Where is Queensland selling to?



Queensland sell-side transactions increased to 202 deals in 2025, marking a meaningful increase over last year and sitting above the 12-year average of 200 deals. The uplift was driven by international demand, alongside a solid return of PE-fund acquirers.



International acquirers completed 67 Queensland acquisitions – the highest level ever. Renewed global confidence saw both US and UK buyers re-enter the market, targeting defensive service providers and mid-market platforms with scalable national footprints.



Interstate appetite remained stable, with 78 deals recorded. Interstate strategic buyers remained focused on expanding national networks, especially across Leisure and TMT.



Private equity increased their activity during 2025 completing 15 direct acquisitions. Sectors which attracted the most attention were Consumer (4 deals) and Technology, media & telecoms (3 deals).

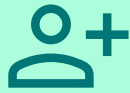


About *Pitcher Partners*



140+

partners



1,300+

people



6

independent
member firms



9th

largest network
of accounting and
advisory firms

National statistic as at 1 July 2025

We're ready to *help you thrive*

Since day one we've been helping businesses, families and individuals intelligently frame their goals and make the most of their potential.

Today, we're one of the largest accounting, audit and business advisory firms in Australia. We work with middle market businesses, from family-run companies to renowned industry leaders and iconic brands. And help families and individuals manage their wealth across generations.

If you've got ambition, we're the team you want on your side.

Local knowledge, national footprint

Pitcher Partners is a national association of six independent accounting, audit and business advisory practices. You'll find our firms in Adelaide, Brisbane, Melbourne, Newcastle and Hunter, Perth and Sydney. Each firm has a unique character, with a strong connection to the local community. Supported by our combined resources, we deliver Australia's most personalised and responsive assurance and advisory services.

And if you're thinking beyond the border, we can support your global operations and ambitions through the Baker Tilly International network.

We'll always make it personal

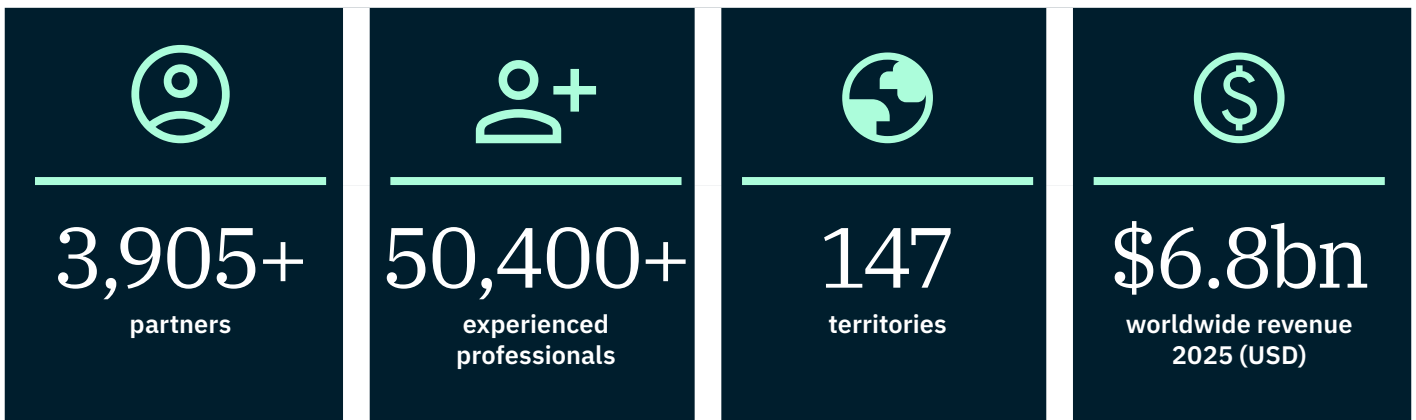
At the heart of Pitcher Partners is the idea that business is never just business. We're known for the dedication we give to building great relationships, and it's been that way from the start. People first.

Everything we do is grounded in communication and collaboration. We're here for that frank, refreshing and always informed discussion that leads to new ideas and better decisions. And we're here for you. Whatever your goals, we can get there together.

Our global *reach*

We are proud to be a member of the Baker Tilly network, a global network of independent accounting and business advisory firms, whose member firms share our dedication to exceptional client service.

Every day, 50,400+ people in 147 territories share experiences and expertise to help privately held businesses and public interest entities meet challenges and proactively respond to opportunities. International capability and global consistency of service are central to the way we work.



Global statistic as at December 2025

Baker Tilly International

Experts across a wide range of industry and business sectors, each Baker Tilly International member firm combines high-quality services and in-depth local knowledge. Sharing knowledge and resources, our business approach brings together the power of the global network to deliver exceptional results to clients globally.



Pitcher Partners

Pitcher Partners is an independent member of Baker Tilly International. Pitcher Partners' strong relationship with other Baker Tilly International member firms, particularly in Asia-Pacific, provides clients with access to international networks, opportunities and expertise to expand globally.



Pitcher Partners is a member of the global network of Baker Tilly International Limited, the members of which are separate and independent legal entities.

Making
business
personal



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