

# South Australia

## Manufacture where you grow

Agrifutures  
**evoke** AG





Invest SA is a dedicated team of investment and business professionals within the Department for Trade and Investment that can connect you with opportunities, industry networks, and other government agencies in the food, wine and agribusiness sector in South Australia.

Invest SA, **Food, Wine and Agribusiness team** offers project facilitation and case management services to support your business growth.

[invest.sa.gov.au/sectors/food-wine-and-agribusiness](https://invest.sa.gov.au/sectors/food-wine-and-agribusiness)

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# Our strengths = your opportunity



## Manufacture where you grow

Major producer of quality raw materials; world-leading, consistent, agricultural, and cropping regions grown in diverse sub-climates and controlled environments.



## Nation-leading environmental and climate change credentials

Ceased coal-generated electricity production in 2016; leading the world in the transition to renewable energy, with 100% renewable production on track to be achieved before the 2030 target.



## World-leader in green economy

Internationally recognised leader in recycling, water management, climate change, smart cities, innovation, and renewable energy.



## World-leading capabilities in advanced technologies

Home to technologically advanced glasshouses and renowned global food manufacturers.



## Largest concentration of world-class agricultural research in the southern hemisphere

Extensive research and development (R&D) proficiency in agricultural production underpinned by the Waite Research Precinct (WRP), the largest agricultural R&D precinct in the Southern Hemisphere.



## Robust biosecurity frameworks and traceability systems

Global reputation for producing clean, green and safe food.



## Counter-seasonal growing

Reliable source of quality food commodities offering supply security for domestic and international consumers and food and beverage manufacturers.



## Sustainable agricultural water sources

Significant natural water sources and storage, including underground wells, recycled water schemes, desalination and rainwater harvesting provide abundant access for primary producers to grow consistent and healthy crops, even in barren environments.



## Robust food and beverage supply chain

Access to a well-established supply chain supported by reliable domestic and international logistics and distribution partners.



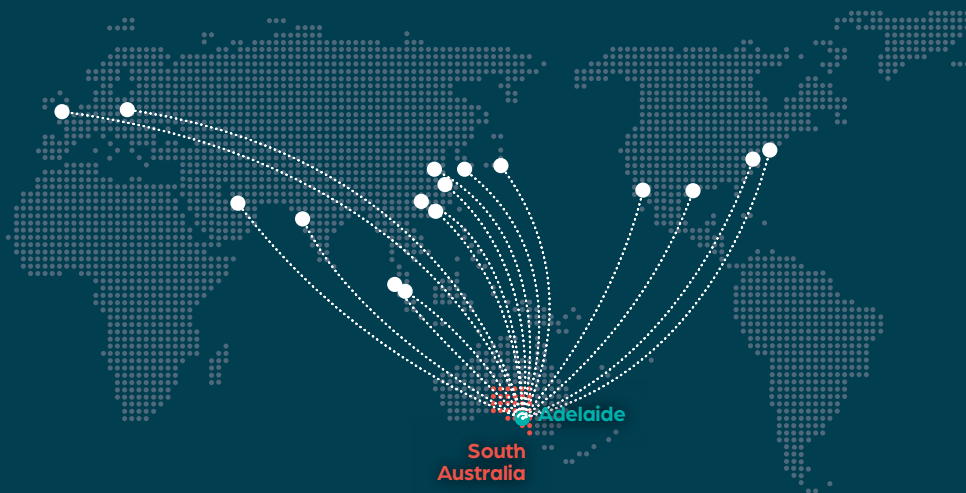
## Gateway to the Asia-Pacific

Direct air freight capacity to markets in Asia, the Pacific and Middle East

# Introducing South Australia

Clean, green environment	Primary production industries protected by rigorous biosecurity measures. One of the few places in the world that is free of animal diseases like Foot-and-Mouth Disease, African Swine Fever, Avian Influenza, grape vine destroying pest phylloxera and is the only mainland Australian state recognised as being free of fruit flies.
Manufacturing	Manufacture where you grow with abundant, high quality raw materials, manufacturing capability and skills, suitable land and sites, access to critical infrastructure and logistics and outstanding research. South Australia is ideally located to sell to the growing markets of Asia in an ecosystem that nurtures innovation and collaboration.
AgTech	Cementing its place as an innovative hub for agricultural technology development, commercialisation and industry adoption and the home of the Australian Institute of Machine Learning (AIML). All are ideal for connecting to Agtech opportunities. South Australia offers a nationally recognised entrepreneurial ecosystem with a variety of innovation programs, co-working spaces, and incubators.
Green energy powerhouse and a leader in sustainability	South Australia is at the forefront of green innovation, waste recycling, and resource recovery by reducing waste to landfill and increasing recycling capabilities. International leader in integrating wind, solar and battery into the state's electricity network, with over 72% of the state's power being generated by wind and the sun. Future green hydrogen production will open opportunities for decarbonising industries including food and beverage manufacturing.
World-leading R & D	Home to globally recognised educational institutions including the WRP and leading experts at the forefront of R&D and commercialisation. Access to trusted industry partners with expertise to accelerate ideas into concepts to take to market.
Centrally located and established freight logistics	Network of heavy vehicle expressways and numerous rail intermodals connected to national road, rail routes and an international port, which aids supply chain optimisation, trade facilitation and enhances our state's competitiveness on both national and global levels. Free Trade Agreements are in place with many countries and with a multicultural workforce, South Australia is well connected to Asia, which is serviced by air and sea.

## ● Invest SA overseas offices



## Invest SA helps facilitate



### Invest SA helps facilitate:

- Identifying a suitable location
- Connections across government
- Attracting and retaining highly-skilled staff
- Introductions to industry partners and networking opportunities
- Planning and cross-government delivery of investment projects
- Connections with our global teams and identifying export opportunities



# A global reputation for producing safe, high quality food and beverages

South Australia represents the gold standard of where tradition intersects innovation within the heart of our thriving food, wine, and agribusiness sector. Boasting an at-scale, efficient production of agri-produce, the rich tapestry of time-honoured farming and manufacturing practices seamlessly intertwine with innovative technology, underpinned by advanced R&D expertise and capabilities.

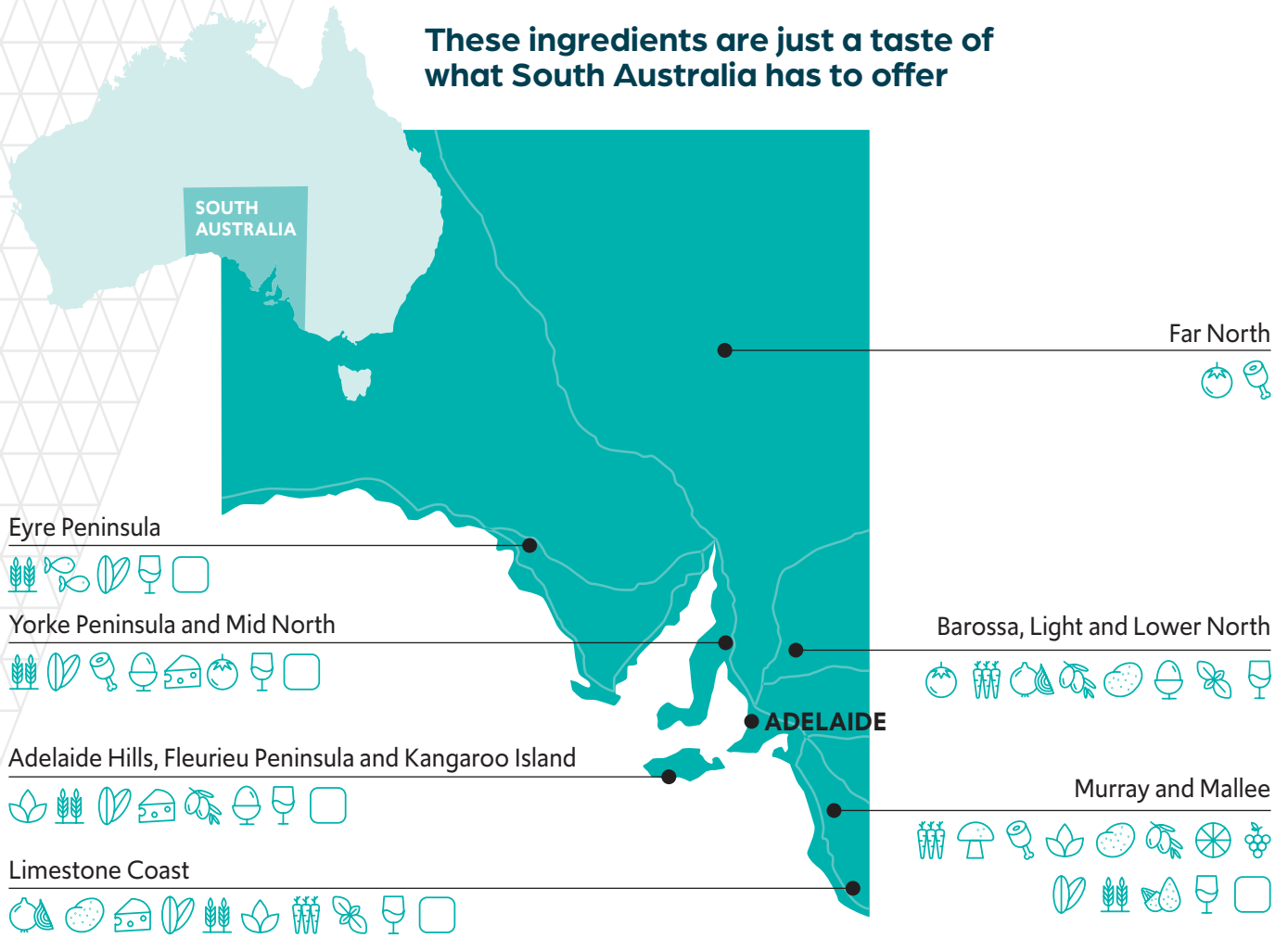
Adopting the research findings in South Australia to broadacre crops like wheat have led in significant growth in water use efficiency (WUE). In the 1960's WUE was averaging around 7 kg/ha/mm in the 1960s and 1970s, then steadily increased through the 1980s and 1990s before levelling out at around 11 kg/ha/mm in the 2000s. Over the last decade, WUE has increased to about 14 kg/ha/mm. Technology advances have also been applied to enable high-tech glasshouse production to occur in South Australia.



# South Australia

All the quality ingredients to build wholesome and honest food can be found here in South Australia, with an international reputation for clean, pure and safe food production.

## These ingredients are just a taste of what South Australia has to offer



Wheat



Onions



Meat



Almonds



Seafood



Durum



Tomatoes



Grapes



Olives



Wine



Barley



Potatoes



Eggs



Carrots



Other



Basil



Mushrooms



Dairy



Citrus

*other crops include canola, lentils, oats, ryecorn, triticale, lupins, peas, beans (fava and broad), chickpeas and vetch*



# A global reputation for producing safe, high quality food and beverages



## Grains and pulses

South Australia's 4,500 grain farms grow on average 8 million tonnes of grain crop each year, including wheat, barley, lentils and canola. The farm gate value in 2021-22 exceeded AUD\$3 billion. More than 80% exported to 60 countries. Local processing includes beer, flour, pasta and biscuits.



## Dairy

From large commercial milk processors to niche producers to world-leading boutique artisan cheesemakers. Supported by production of 490 million litres of milk in 2021-22 from more than 64,000 cows with the highest average milk volume in Australia.



## Meat and livestock

Domesticated livestock industries, including beef cattle, sheep, pigs, chickens and goats, generate around AUD\$4.5 billion annually in revenue. South Australia is a leader in the development of undomesticated meat industries, with camels processed for export markets and kangaroos processed for both Australian and overseas destinations.



## Seafood

South Australia's clean waters are home to some of the world's most sought-after seafood including rock lobster, Southern Bluefin Tuna, oysters, prawns and abalone. The wild catch and aquaculture industries produced approximately 73,000 tonnes in 2021-22, with a production value of AUD\$406 million.



## Horticulture

South Australia is a major horticulture producer and recognised for its excellence in environmentally clean, safe and advanced agricultural production. A diverse combination of fruit, nuts and vegetables make up South Australia's horticulture industry.



## Wine

South Australia is indisputably Australia's wine state, producing 50% of all bottled wine and about 80% of premium wine. Adelaide, South Australia is a Great Wine Capital of the World, which recognises its wine regions as significant economic and cultural assets. Rigorous biosecurity measures have kept our vines free of phylloxera, making some of our vines the oldest in the world.



## Food processing

With a diverse food production sector processing meat, grains, dairy, seafood, nuts, fruit and vegetables, food and beverage is the largest manufacturing sub-sector in South Australia.



South Australia has all the elements you need for successful and profitable food processing. We have an abundance of high-quality raw materials, manufacturing capability and skills, suitable land and sites, access to critical infrastructure and logistics, outstanding research and a supportive state government. We are ideally located as a base for enterprises keen to sell into the growing markets of Asia. It all adds up to a food and agribusiness ecosystem that nurtures innovation, collaboration and profitability.

- **Primary industries and agribusiness contribute AUD\$17.3 billion in revenue.**
- **51% of South Australia's overseas exports are primary industries and associated processing.**
- **Food and beverage manufacturing is the largest component of manufacturing in South Australia, accounting for almost a fifth of total manufacturing activities.<sup>1</sup>**
- **One in 12 people are employed in food, wine and agribusiness.**

<sup>1</sup> Source: South Australia's Advanced Manufacturing Strategy 2023.  
All other data: Source: Primary Industries Scorecard 2021–22 and 2021 Census.





# Manufacture where you grow

South Australia's strengths in renewable energy and green technologies provides the perfect opportunity for companies looking to minimise their carbon footprint.

South Australia is a major producer of high-quality raw materials and home to consistent agricultural and cropping regions, which sit alongside a well-established food and beverage manufacturing ecosystem, making the state an excellent location for agri-centric manufacturing. As the world looks to modern technologies like precision fermentation to meet the food security needs of a growing global population, investors can leverage South Australia's significant fermentation capability, built from over a century of wine making and brewing, and the state's food manufacturing ecosystem, to scale up and deliver new food and beverage products.

## **Globally recognised production of high-quality raw ingredients at scale**

South Australia offers access to a diverse range of readily available quality raw materials. South Australia grows around four million hectares of grain crop each year, including wheat, barley, lentils and canola. The farm gate value in 2021-22 exceeded AUD\$3 billion. Yields continue to grow while maintaining minimal impact on South Australia's clean soils and water resources. South Australia is also a major horticulture producer and recognised for its excellence in environmentally clean, safe and advanced agricultural production. A combination of fruit, nuts and vegetables make up South Australia's horticulture industry.

South Australia's raw materials are grown at scale in a variety of sub-climates and controlled environments. This makes South Australia the ideal place to take advantage of emerging global market opportunities across a wide array of new and innovative products, such as alternative proteins including plant protein.

## **Counter-seasonal growing**

Counter-seasonal growing, to the Northern Hemisphere, allows reliable sources of quality food commodities that offer security of supply for domestic and international consumers, and food and beverage manufacturers, servicing the Asia-Pacific region.

## **Robust food and beverage supply chain**

An expansive agribusiness industry provides access to a well-established supply chain across metropolitan Adelaide and regional South Australia. From raw materials and trusted suppliers to contract manufacturing and household brands, all are supported by reliable domestic and international logistics and distribution partners.

## **World-leading capabilities in advanced technologies**

Home to some of the most technologically advanced glasshouses as well as several renowned global food manufacturers. South Australia's significant local food manufacturing industry is well-connected, collaborative, and ready to partner on new and innovative product development, commercialisation, and contract manufacturing opportunities.

## **Robust biosecurity frameworks and traceability systems**

Global reputation for producing clean, green, and safe food, aided by South Australia's rigorous regulatory systems and innovative technologies, have allowed South Australia's provenance story to grow, supplying increasing international market demand for unique, fresh, and healthy options sourced from our pristine oceans and fertile soils.

# Plant protein innovation

South Australia is the ideal location for next generation plant protein manufacturers. With some of the world's best consistent agricultural and cropping regions, South Australia is a globally renowned producer of premium quality pulses (chickpeas, lentils, lupins and faba beans) and grains (oats, wheat, and barley).

South Australia is a scale producer, with established export markets, of all core pulse varieties. South Australia produces 50% of Australia's lentils, 37% share of faba beans, 37% share of field peas and is a significant oat producer. The state's central location on the Australian mainland allows for efficient sourcing of input ingredients from across the country.

## **Largest concentration of agricultural research in the southern hemisphere**

South Australia has extensive and proven R&D capabilities, underpinned by research institutions including WRP. It is a co-located partnership of 18 complementary organisations and centres engaged in world-class research and development in plant, agricultural, food, wine, and natural resources science.

The South Australian Research and Development Institute (SARDI), located at the WRP, has invested in milling and pilot scale dry fractionation equipment to enable industry research into plant protein and fibre fractionation and environmentally sustainable processing methods. It has also invested in lab and pilot scale extrusion capability. This capability complements the WRP's expertise in food technology, supporting the focus on the development of next generation plant protein products.

A testing facility is also available to explore both traditional and molecular microbiology, with the testing protocols modified to accommodate a wide range of food commodities and processing environments.

## **Progressive regulatory environment**

The South Australian Government is committed to its agribusiness industry and leveraging its proximity to Australia's largest sources of globally renowned, premium quality, next generation plant protein input crops.

## **Most cost competitive city in Australia**

South Australia's lower cost business environment, competitively priced vast industrial spaces located within proximity to agricultural producers, and multi-logistic networks, provide opportunities for companies to establish efficient and cost-effective plant protein manufacturing facilities in South Australia.

**South Australia produces over 24% of the nation's pulses**

## **South Australia is:**

- expanding the WRP to support plant protein ingredient development
- developing viable plant-based food ingredients, and establishing a commercialisation pathway
- focusing development on prototype plant-based food products such as healthy low fat/allergy alternatives; and
- attracting key components of the required ecosystem that will provide a solid foundation for further growth and investment attraction.



### **Precision fermentation**

Precision fermentation is considered one of the most promising technologies for producing alternative proteins and associated ingredients to meet the future global protein demand. The process of fermenting modified organisms to produce enzymes, medicine and therapeutics safely and effectively has been used for decades. The application of the process to produce animal proteins and other ingredients required by the alternative protein industry will present new challenges. With a synergistic wine industry and world leading research organisations, combined with existing traditional protein production industries, South Australia is well positioned to support the development of this future global industry.

### **The Australian Wine Research Institute**

The Australian Wine Research Institute (AWRI) is one of the world's leading grape and wine research and development R&D organisations supporting a sustainable and prosperous grape and wine industry through worldclass research, practical solutions, and knowledge transfer. The AWRI has broad capabilities that supports precision fermentation, including internationally recognised expertise in microbiology, molecular biology, genomics, and analytical chemistry. Routinely The Institute undertakes functions studies applying using modern molecular biology and microbiology tools such as recombinant DNA technology, genome editing, flow cytometry and continuous culture fermentation. With vast eExperience with in next-generation sequencing technologies is used to analyse genomes of plants and microorganisms, and metagenomes in complex food, beverage, and environmental samples. AWRI's work is Underpinned by an extensive culture collection, a powerful resource of microbial diversity comprising of over 20,000 strains of yeast and bacteria strains.

### **The University of Adelaide – School of Chemical Engineering, Bioprocess Engineering**

The school recently invested in state-of-art biomanufacturing laboratories including industry standard equipment for all major unit operations and analytics up to semi-commercial scale. This includes bioreactors for mammalian and microbial fermentation, tangential flow filtration, batch and continuous chromatographic purification, and advanced analytical capabilities.

The university can provide laboratory testing in the following areas:

- Lipid nanoparticles, cell uptake optimisation, microfluidics, and drug delivery systems
- Drug stability and formulation optimisation
- Microbial fermentation and cell culture
- Early and late-stage process development including in-silico process modelling and optimisation
- Continuous biomanufacturing including continuous fermentation and continuous chromatography
- Purity and stability analysis of proteins and other biological products.



# Wine and Beverages

## Wine

South Australia stands with Bordeaux and Napa Valley as one of 12 Great Wine Regions of the world.

South Australia produces most of Australia's prestigious wines from some of the oldest vines on the planet, producing 80% of Australia's premium wine and 50% of all bottled wine.

Eighteen wine regions known for their distinctive terroir and varietal excellence are located within South Australia - including Clare Valley Rieslings, Coonawarra Cabernet Sauvignons, Barossa Valley and McLaren Vale Shiraz and Adelaide Hills Pinot Noir and sparkling wines.

South Australia has eight of the 13 oldest wine companies, or continuously operating wine brands in Australia, with some of the most established and historic wineries consistently named in the 'Top 50 Vineyards in the World' at the 'World's Best Vineyard Awards' including Penfolds (Magill), Henschke, Seppeltsfield (Barossa Valley), and d'Arenberg (McLaren Vale).

### Rigorous biosecurity

South Australia is one of the few places in the world that is free of the vine-destroying pest phylloxera, allowing wine to be produced from exquisite vines up to 160 years old, responsible for the oldest, continuous single vintage in the world, being Barossa Valley's Seppeltsfield ports (dating back to 1878).

## 2023 international and national food and beverage award winners:

- **Restaurant & Bar Design Awards 2023 - 'Best Overall Bar' and 'Best Australia & Pacific Restaurant/Bar' - Luma Restaurant & Bar (Adelaide)** <sup>2</sup>
- **World's Best Vineyards Awards 2023 - South Australian wineries in the top 100 - d'Arenberg #17, Henschke #26, Penfolds Magill Estate #44, Seppeltsfield Barossa #98** <sup>3</sup>
- **2023 International Wine & Spirit Competition - Kangaroo Island Spirits awarded the highest accolade - a Gold Outstanding medal for its O Gin** <sup>4</sup>
- **International Champion Award 2022 - Taylors Estate Shiraz 2020 (Clare Valley)** <sup>5</sup>
- **Wine Bar of the Year 2023 - Jennie Wine Bar (Adelaide)** <sup>6</sup>

<sup>1</sup>IWSR

<sup>2</sup>Restaurant & Bar Design Awards 2023

<sup>3</sup>World's Best Vineyards Awards 2023

<sup>4</sup>2023 International Wine & Spirit Competition

<sup>5</sup>Great Champions Awards, Vinus 2022, Argentina

<sup>6</sup>Australian Bartender Bar Awards 2023

<sup>7</sup>Luxlife Magazine's Travel and Tourism Awards, 2023

## World-leading innovation

South Australia is world-recognised in education and innovation in viticulture, winemaking, and production, supported by the globally recognised AWRI and the University of Adelaide. World first innovations have included the screw cap closure that revolutionised quality assurance and convenience, development of cask wine packaging, recycled plastic bottles and viticulture techniques.

## Beverages

Alongside South Australia's well-established wine ecosystem, the state's beer, cider, spirit, low and nonalcoholic beverage industries are thriving. With a century-long reputation, created in the late 1800s, South Australian craft beers, ciders and spirits, distillers and brewers are experiencing a resurgence in popularity with world-recognised gin, whisky, and vodka.

World class beverages are being crafted by a growing array of large and small artisans, who draw their premium ingredients from the Adelaide Hills (cool climate apple and pear orchards), Riverland (vineyards) and Yorke Peninsula (barley and wheat fields).

## No and Low Alcohol beverages

With the growth of health-focused demand for low and non-alcoholic beverages, researchers from the University of Adelaide and the AWRI have teamed with Wine Australia and Australian Grape & Wine to develop a 'No and Low' (NOLO) Alcohol program to build on the success of the wider beverage industry.

These types of wines are gaining global popularity among health-conscious consumers who are looking to reduce their alcohol intake without compromising on the taste and experience of drinking wine.

The global NOLO wine market, valued at AUD\$3.03 billion in 2022, is growing rapidly, with Australia representing 5% of volume and 6% of value.<sup>1</sup>

The Government of South Australia's NOLO Alcohol Program includes an investment of AUD\$1.98 million for the University of Adelaide to establish the world's first trial-scale NOLO research facility to enable the South Australian wine industry to create world-class products, develop a skilled workforce and capitalise on significant market opportunities.

**Watervale Hotel, located in South Australia's Clare Valley wine region, named Best Culinary Experience Hotel in the World for 2023<sup>7</sup>**



# Packaged, native and functional foods

## Packaged foods

Packaged food is South Australia's largest and fastest growing form of manufacturing.

South Australia offers global food and beverage companies' pathways to market via contract manufacturing opportunities, with businesses investing in infrastructure to equip their manufacturing facilities with technological advancements and innovations in processing and packaging.

Product development is reinforced by a strong domestic customer base and supported by independent supermarket retailers which dominate the South Australian market, giving companies a testbed for consumer tastes and build on product innovation.

## Native foods

Celebrating and sharing the unique flavours of a 60,000-year-old culture, the emerging Australian native food industry has enormous potential for the development and delivery of authentic Australian foods, and raw ingredients, for both national and international communities.

The rich Australian flora, containing over 25,000 native species, provides opportunities for the selection of traditionally consumed sources that, besides being new attractive foods, possess significant health-enhancing properties.

There is an untapped export market for Indigenous botanicals supporting a growing range of Indigenous companies in agribusiness, food, and beverage. In South Australia there are four endemic foods that have the potential for commercialisation to national and international buyers - the bush tomato, wattleseed, desert lime and quandong.

## Functional foods

The WRP offers a unique testbed for functional food and beverage development and production.

Functional foods provide an extra health benefit to the consumer beyond basic nutrition. Ingredients that present an excellent opportunity for South Australia include:

- poly-unsaturated fatty acids (PUFAs)
- proteins and peptides (e.g. from dairy)
- Vitamin D
- probiotics
- aloe vera extract
- phytosterols
- carotenoids
- polyphenols
- indigenous plant extracts.

Demand for health-promoting food and beverages is being driven by ageing populations, particularly in the Asia-Pacific region, in line with increased demand for remedies to lifestyle-related diseases such as diabetes, digestive issues and bone density loss.

South Australia's latest developments in functional food include:

- Breeding high lutein wheat, that has been proven to retain its functional properties through processing and heating processes, offering eye health benefits
- Breeding a low-GI wheat, to assist in preventing disease, like diabetes
- Omega-3 in eggs derived from plant-based source, without the fish taste, offering many health benefits.

South Australia's expertise in food production, processing, and export, coupled with vast potential in the state for sourcing healthy foods, nutritional components and functional food and ingredient development, provide extensive opportunities for companies looking to establish here. Primary produce including grains, dairy, fruits, vegetables, meat, and seafood all have the potential to capitalise on their intrinsic nutritional value in the functional food market.







# Blue bio industry

## Investigate South Australia's unique marine biota

Australia has the world's third-largest marine area. Much of the nation's rich and diverse marine bioresources are situated within its exclusive economic zone and are yet to be explored and developed for new and improved health, nutrition, aquaculture, agriculture and biomaterial applications.

With 80% of South Australia's marine life occurring nowhere else, leading research and development, and proactive regulation, the opportunity exists to explore and develop new products from our bioresources.

South Australia is home to well-established fisheries and aquaculture industries, with a reputation for producing safe, sustainable, high quality and high value products in both land and marine based environments.

The number of seaweed business operating out of South Australia continues to grow - from developing and producing fertilisers, food and health products to traditional aquaculture businesses diversifying into seaweed farming. For example, CH4 Global is building its first full-scale EcoPark in South Australia to sustainably grow its methane-reducing *Asparagopsis* feed supplement at scale.

## Nearly 80% of South Australia's marine biota is unique to our region

Southern Australia has more than 1,400 species of seaweed and up to 60% of these species are found only in South Australian waters.

South Australia has almost 15% of the world's recorded diversity for red and brown seaweeds, which are the most commercially valuable species.



Nearly 80% of South Australia's marine biota is unique to our region.



Southern Australia has over 1,400 species of seaweed, 60% of these species are only in found South Australian waters.



Home to the Marine Bioproducts Cooperative Research Centre, Australia's flagship industry-driven marine bioproducts research and development hub.



Access to world-leading research and development capability.



World-class regulatory framework for aquaculture development.



Marine and land-based licences including macroalgae management areas for seaweed seedstock or broodstock collection to farm seaweed.



Marine areas and coastal land available for farming in a clean, pristine environment.



Established fisheries and aquaculture industries.

# Green economy leadership

## South Australia's circular economy leadership

South Australia is an internationally recognised leader in the circular economy, with over 80% of all waste generated in South Australia diverted from landfill. The state is recognised for its high-performing household waste collection systems, food, and organics recycling and over 90% of construction and demolition waste recycled into new products.<sup>8</sup>

South Australia has a lengthy list of 'firsts' in its circular economy successes, including being the first state in Australia to implement a container deposit scheme in 1977, 35 years before the next Australian state. Since then, the state has gained praise for its leadership in regulatory actions including introducing a ban on plastic bags (2009) and recent single-use plastic ban on items including plastic straws, cutlery, and plates (2021).

- **South Australia leads Australia's recycling and resource recovery performance**
- **Highest recovery rate – 81.9% waste recovery rate 2021–22 (3.99 million tonnes diverted from landfill)**
- **92% of recovered materials were recycled in South Australia**

## Renewable energy powerhouse

South Australia is ranked number one globally for annual renewable energy generation from wind and solar resources. The state's leadership in integrating wind, solar and battery energy systems into the state's energy network has already delivered over 72% of the state's electricity being produced through wind and solar. South Australia is on track to meet 100% of its electricity demand from renewable energy by 2030.

South Australia is poised to produce and deliver a sustainable supply of green hydrogen with 56 renewable energy projects in the pipeline, totalling AUD\$20 billion dollars.

## Climate independent water

South Australia's Virginia Pipeline Scheme (VPS) is the largest recycled water project of its type in the Southern Hemisphere, second in the world and the first in Australia.

The project was established in 1997 to provide a reliable, climate-independent Class A source of water (highest recycled quality), for the horticulture industry on the Northern Adelaide plains.

Around 20 gigalitres of recycled water per annum from the Bolivar Wastewater Treatment Plant reaches market gardeners and the food industry to help supply the national market with tomatoes, cucumbers, peppers, and bunch lines.

The Northern Adelaide Irrigation Scheme (NAIS) was developed by the South Australian Government to grow agricultural industries through increased access to water resources in the Northern Adelaide Plains.

The location of NAIS provides a critical climate and season independent water supply to support the region's suitability for agriculture – with fertile soils, a Mediterranean climate, proximity to transport and logistics and ready access to skilled labour.

The NAIS infrastructure will deliver 12 gigalitres per annum of climate independent recycled water to the region.

Port Augusta Renewable Energy Park

<sup>8</sup>Source: Green Industries South Australia



## End Food Waste Australia

End Food Waste Australia, the merging of Fight Food Waste Cooperative Research Centre and Stop Food Waste Australia, will continue to undertake a range of activities and programs into the future, fostering unprecedented collaborations with more than 100 industry, government, and research partners. This significant public-private partnership has driven Australia's most extensive research on consumer food waste behaviours, pioneered transformative technologies for repurposing unavoidable food waste, established evidence-based food waste reduction best practices and led collaborative industry food waste action through the Australian Food Pact.

Headquartered in South Australia, End Food Waste Australia is committed to creating a more productive, sustainable, and resilient Australian food system by ending food waste and food insecurity, progressing Australia's goal in line with the United Nations Sustainable Development Goal 12.3, to halve per capita global food waste at the retail and consumer levels and reduce food losses along production and supply chains, by 2030.

## Sustainable forestry

South Australian, forest and wood processing industries are entirely plantation-based with no native forests harvested. Every tree that is harvested has been planted specifically for wood production.

South Australia's plantation forests cover approximately 189,000 hectares. The main species grown are radiata pine (*Pinus radiata*) and Tasmanian blue gum (*Eucalyptus globulus*).

South Australia's forest production exceeds 2.7 million cubic metres and is worth about AUD\$2.6 billion annually.

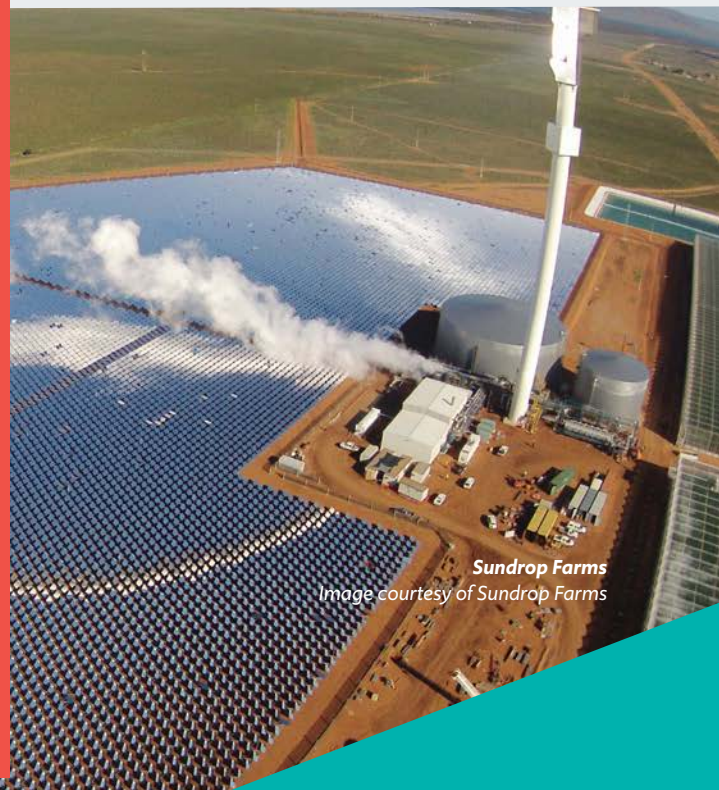
The Limestone Coast is the state's major forestry region, with the wood harvested from plantations being used for house frame construction, infrastructure, fencing, furniture, bioenergy, and household paper. South Australia produces approximately 35% of Australia's locally produced house framing and interior sawn wood. South Australia is also the location for Australia's first Cross Laminated Timber (CLT) and Glue Laminated Timber (GLT) facility, the Timberlink plant at Tarpeena.

Investment opportunities include existing processing facilities and new value-added initiatives as well as renewable energy using forest and processing waste. Innovation to add further value to timber production and opportunities are available to industries and companies to maximise the use of timber to assist transition to net zero carbon emissions.

## Case study: Sustainable horticulture – Sundrop Farms

Sundrop Farms is a world leader in sustainable horticulture, employing revolutionary technology to produce high-value crops using renewable sources in arid environments. It is the first company in Australia to develop a commercial scale operation using solar thermal and desalination technology.

Located near Port Augusta (north of Adelaide), Sundrop Farms' technologically advanced 20-hectare state-of-the-art greenhouse allows it to produce horticultural crops in non-traditional locations with limited access to fresh water or grid energy. Demonstrating leading innovation in the integration of solar thermal, electricity generation, freshwater conservation, production, climate control and hydroponics, Sundrop Farms' technologies provide optimal conditions and sustainable farming practices that allow year-round crop production.



# Research and development

## Waite Research Precinct

WRP has the largest concentration of expertise in the areas of plant biotechnology, cereal breeding, sustainable agriculture, wine, food, horticulture, and land management.

WRP underpins Australia's agricultural industries with both fundamental and applied research, through its strengths in grains, soil science and wine production, with plant breeding, functional genomics targeting improved plant performance and quality and collaboration on crop management and farming conditions.

The Institute is an ideal strategic R&D partner for companies considering a base in South Australia for indoor farming systems and vertical farming expertise. The research and development undertaken at WRP, on behalf of Australia's agricultural sector, has already delivered multiple critical innovations, discoveries, and breakthroughs.

The campus is located seven kilometres from Adelaide's city centre and is home to 19 key research and innovation partners including the University of Adelaide, CSIRO, AWRI, South Australian Research and Development Institute, Australian Grain Technologies, Australian Genome Research Facility, Australian Plant Phenomics Facility, Arris Pty Ltd, ARC Industrial Transformation Research Hub for Wheat in a Hot and Dry Climate, Plant Energy Biology, ARC Training Centre for Innovative Wine Production and Adelaide Glycomics, Food SA and End Food Waste Australia.

## Australian Plant Phenomics Facility

Located at the WRP is the Australian Plant Phenomics Facility (APPF). The open access APPF is one of the first plant phenotyping facilities in the world, using a multi-disciplinary approach in its design and commissioning of complex phenotyping platforms for use in controlled environmental and in the field software, and to facilitate data management analysis and visualisation.

## The Plant Accelerator

The Plant Accelerator is an initiative of the APPF and offers professional consultation on plant phenomics and experimental design, backed by dedicated bioinformatics support with data management and analysis. The facility's capabilities include combining digital imaging technologies, high-capacity computing, and robotics to allow the automated, high throughput, non-destructive measurement of plant growth and function (phenomics).

*University of Adelaide,  
Waite campus*





# World-class agricultural research, technology, and innovation

## Commitment to new technologies

The state's strong space and defence industries are helping form nation-leading AgTech innovation, from the use of: satellites to detect crop health; autonomous farm machinery; robotics in meat processing; and remote sensing to maximise water use efficiency with the University of Adelaide's WRP and the AIML for collaboration on crop management and farming conditions, and Minnipa Research Centre on the Eyre Peninsula, a nationally recognised dryland farming research hub.

Strengthening the state's AgTech capabilities is the work currently being undertaken in farming including:

- precision agriculture techniques through applications of new technologies such as artificial intelligence and remote sensing
- growing food closer to where the consumer lives reducing transportation costs, CO<sub>2</sub> emissions and reducing the need for refrigerated storage, making produce fresher and more profitable
- robotics and their applications in everyday operations
- blockchain.

The Department of Primary Industries and Regions, South Australia's (PIRSA's) AgTech start-up hubs support entrepreneurs to develop entrepreneurship and technology capabilities to solve critical industry challenges – the perfect environment for primary producers to connect with AgTech developers through collaborative networks.

## Lot Fourteen

The innovation precinct of Lot Fourteen is home to AIML which ranks in the top six worldwide in computer vision (csrankings.com). AIML's agricultural focus is across three key themes of sensing and monitoring, data management and analysis and farm automation. The Lot Fourteen precinct provides unique opportunities to partner with ground-breaking companies and is the perfect location to grow with our AgTech industry. The precinct is also home to the Australian Space Agency.

## Factory of the Future

South Australia's Line Zero Factory of the Future at Flinders University brings together education, industry, and government to facilitate the implementation of Industry 4.0 technologies.

Bridging research, development and innovation, Line Zero Factory of the Future delivers a world-class, reconfigurable advanced manufacturing test bed, training, and industry growth facility – the first of its kind in Australia. It is a purpose-built facility that allows for industrial scale testing of new technologies and processes in the advanced manufacturing or shipbuilding industries.

A joint initiative between Flinders University, BAE Systems Australia and supported by the Innovative Manufacturing Collaborative Research Centre and state and federal government, the Factory of the Future connects industry with enabling technologies, research capabilities and training to modernise and transform manufacturing and integrate Industry 4.0 tools into production, including:

- advanced robotics and AI
- sophisticated sensors
- cloud computing
- Internet of Things
- data capture and analytics
- digital fabrication
- software-as-a-service; and advanced navigation tools.

The Factory of the Future is significantly reducing barriers to entry for companies seeking to adopt advanced manufacturing technologies, by connecting them to key enabling technologies and research capabilities, driving investments in new technologies and capabilities for Australia.

# Innovation districts

Our sectors co-exist in hi-tech hubs and research centres, forging collaborative ecosystems that open doors and inspire new ways of thinking.

## **Roseworthy Campus** 61kms from Central Business District

A hub of undergraduate teaching, postgraduate training, research, and clinical services with an international reputation for excellence in dryland agriculture, natural resource management and animal production.

## **Edinburgh Precinct** 34kms from Central Business District

The precinct is part of a key food manufacturing, food service, defence and transport industry hub. Located in a major industrial growth corridor connected by Adelaide's Northern Expressway and located adjacent to some of South Australia's fastest growing council areas ensuring access to suitable labour.

## **Technology Park** 17kms from Central Business District

Hub for systems development and integration, information communications technology, advanced manufacturing and electronics, and home to over 100 small to medium enterprises, multinationals and start-ups.

## **Adelaide BioMed City** Adelaide Central Business District

AUD\$3.8 billion medical innovation district with leading edge anchor institutes and companies that cluster and connect with start-ups, business incubators and accelerators.

## **Space Manufacturing Facility** Adelaide Central Business District

Plans are underway to establish a space manufacturing facility at Lot Fourteen Innovation District to accelerate the development of local space innovation into real world commercial technologies.

## **Lot Fourteen** Adelaide Central Business District

Australia's first ideas and innovation neighbourhood and home to the Australian Space Agency, SmartSat CRC, Defence and Space Landing Pad, FIXE start-up hub, MIT Adelaide Living Lab, Australian Institute for Machine Learning and the Australian Cyber Collaboration Centre.

## **UniSA Enterprise Hub** Adelaide Central Business District

UniSA's Enterprise Hub works with organisations of all sizes to overcome challenges, innovate and add value, creating partnerships, drawing on the energy and expertise of staff, research, and collaborators to produce mutually beneficial outcomes. There is a cross disciplinary team of experts developing novel solutions for the Australian agri-food industry sector to showcase their sustainability credentials and reduce regulatory burden.

## **Waite Research Precinct** 7kms from Central Business District

Home to the largest concentration of agriculture and wine research and teaching expertise in the Southern Hemisphere and a leading centre of Australian research capability in wine, grains, soil and plant breeding. Research organisations include Australian Plant Phenomics Facility, The Plant Accelerator, South Australian Research and Development Institute.

## **Tonsley Innovation District** 12kms from Central Business District

Home to high-value manufacturing industries including defence, health, medical devices and assistive technologies, clean tech and renewable energy, software and simulation, and minerals and energy services. Home to Australian Industrial Transformation Institute (Factory of the Future), South Australia Drill Core Reference Library, SA-H2H Hydrogen Technology Cluster, Hydrogen Park SA, BAE Systems Maritime Australia, Micro-X and the Medical Device Research Institute.





## AgTech demonstration farms showcasing cutting-edge technology

Demonstration Farms have been established across the state offering a diversity of climates and soil types, making them the perfect test beds for AgTech companies to demonstrate, validate and further develop technologies hand-in-hand with industry.

- **Struan/Kybybolite** - high rainfall pasture and livestock production systems
- **Kangaroo Island** - sheep (for wool and meat), cattle, cropping, free range poultry (egg production), viticulture, horticulture, aquaculture and apiculture
- **Turretfield** - livestock, pastures and crops
- **Minnipa** - field crops, low rainfall farming systems
- **Nuriootpa and Loxton** - viticulture, horticulture, citrus



30mins from CBD

-  Shipping terminal
-  Airport

N

5 kilometres  
3.1 miles





# Centrally located, globally connected

South Australia's is the most centrally located capital city in Australia, with access to critical infrastructure, essential for ease of product distribution to national and international networks.

## Globally connect | Gateway to Asia Pacific

South Australia's central location makes it the ideal gateway to access those in the Asia-Pacific region and beyond. The state's logistics network of heavy vehicle expressways and numerous rail intermodals connected to national road, rail routes and the international port and airport, allows the quick and efficient movement of freight interstate and overseas.

Australia continues to enjoy free trade agreements with many countries, including China, Japan, Korea, Singapore, Malaysia and Thailand South Australia has a multicultural workforce and is well connected to Asia, which can be serviced by air and sea.



### Road network

- Expressway level infrastructure providing efficient heavy vehicle connection between ports, industrial zones and all Australian capital cities.
- Toll free expressways and lower congestion making transit by road more efficient and consistent.
- Expressway rated for 36.5 metre road train and 35 metre B-triple heavy vehicles connecting Adelaide's container port, key industrial zones, rail intermodals and national freight routes.



### Rail network

- Access to the national rail network with three established metropolitan intermodal options.
- All intermodals are connected to the expressway rated up to 36.5 metre road train and 35 metre B-triple configurations. Includes Adelaide to Darwin corridor, servicing Alice Springs, Tennant Creek, Katherine and Darwin.
- National rail network connecting with Western Australia, Victoria, New South Wales and Northern Territory.



### Shipping terminals

- International container terminal close to development sites serviced by Flinders Ports.
- Direct connection through the Port River Expressway links the major port and rail terminals directly with the National Highway to Perth and Darwin via Port Wakefield Road, the National Highway to Sydney and Melbourne and the Interstate Mainline rail network.
- Channel can accommodate larger economical vessels.



### Airport

- Located approximately 7 kilometres from the Adelaide central business district.
- Features a dual domestic/international terminal.
- Increasing number of international airlines with direct air freight capacity to markets in Asia, the Pacific and Middle East

# Skilled talent pipeline

South Australia has demonstrated a rare ability to rapidly scale to meet the skilled workforce needs of global companies, and provide the infrastructure, safety and security to transform your business and grow over the next decade with an established manufacturing workforce and supply chains firmly entrenched in the food manufacturing sectors.

The northern Adelaide region is a hub for food manufacturing as the region's workforce has taken the benefits gained from the automotive industry and has transferred these into food manufacturing.

## Education and training

South Australia has three world-class public universities, the University of Adelaide, University of South Australia and Flinders University, consistently delivering high performing graduates. Universities in Adelaide are ranked within the top 1% in the world and have produced numerous Nobel Laureates and Rhodes Scholars, leading the world in their various fields of expertise.

Joining the universities are many private specialist training institutions and vocational training providers. All education and training providers work with companies directly to shape and influence courses to ensure they are relevant for the future.

The University of Adelaide's AIML is ranked in the top six worldwide in computer vision (csrankings.com) and is the top site in Australasia for artificial intelligence research. AIML is working with South Australian farmers, agribusiness, and technology developers to collate and analyse large quantities of agricultural data, allowing farmers to better understand, predict and manage their resources to maximise farm production and profitability.

Joining the universities are the campuses of internationally recognised Torrens University Australia and many private specialist training institutions and vocational training providers. All our education and training providers work with companies directly to shape and influence courses to ensure they are relevant for the future and that innovation is supported and commercialised.

## TAFE SA

TAFE SA is our largest vocational training provider with over one million students having studied with TAFE SA since it was established in 1971.

Each year, TAFE SA accepts more than 68,000 students, delivering training at over 290 locations across South Australia. Their courses cover more than 80 areas of industry and activity, with flexible delivery options.

TAFE SA's experience in customising training for industry, businesses and government departments is extensive and proven. They can tailor training to benefit organisations and deliver it on-the-job, on-campus or online.

## Your future workforce

South Australia offers a range of cost advantages that no other state in Australia can match, improving your company's bottom line with Adelaide ranked as the most cost competitive city in Australia by global services company KPMG. (source)

Access to staff, competitive labour costs and high staff retention rates should place South Australia at the top of your list. Private sector labour costs in South Australia are 10.8% below the Australian average and staff retention rates are higher than Victoria, Tasmania, and New South Wales. (source)

The food, wine and agribusiness industry employs around a fifth of South Australia's total workforce. With companies such as Inghams Enterprises, Bickford's Group, Lactalis, Thomas Foods International, Obela, Goodman Fielder, Pinnacle Bakery & Integrated Ingredients, Lion Drinks, Arnott's Group, Pirate Life Brewing, Maggie Beer, Beerenberg Farm, Beston Global Food Company and La Casa Del Formaggio all owning production facilities in the state, you can be confident that South Australia offers a skilled workforce to help you establish, grow and innovate here.



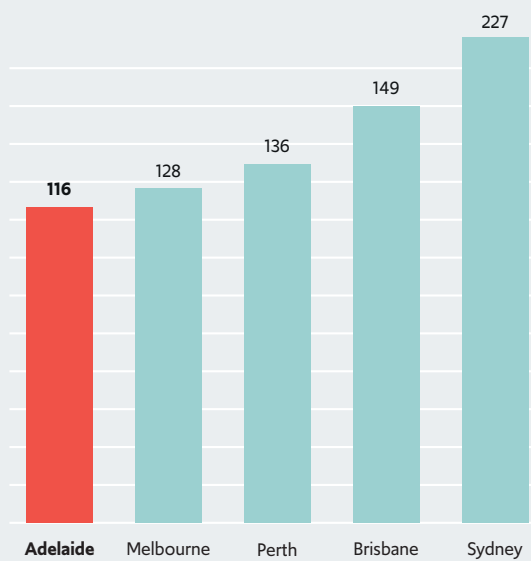


# Australia's most cost competitive city

South Australia's competitive business environment supports commercial success and scaling of operations.

South Australia offers a suitably skilled and scalable workforce with competitive labour cost and high staff retention rates. Businesses benefit from a range of potential cost savings, including land and wage costs. Large industrial land options strategically located in and around greater Adelaide have access to a readily available talent pool, particularly in northern Adelaide where there is an alignment of skilled staff in advanced manufacturing and food processing industries.

## More affordable industrial rental space



Source: Knight Frank Industrial Review Q3 2022

## Staff retention rates, 5+ years in current main job (% of employed)



Source: Australian Bureau of Statistics - Job Mobility [Table 1.2 - Labour mobility, retrenchments and duration of employment by state and territory, February 2023]



**Adelaide CBD**  
Image courtesy of  
Lightly Salted/Liam West



# Advantage Adelaide – live, work & play

South Australia is a great place to live, work and play. The capital Adelaide, is consistently ranked as one of the most liveable cities in the world.

Adelaide is a progressive, cosmopolitan capital offering a premium lifestyle with world-renowned festivals, major sporting events and iconic locations, such as the Barossa Valley, Kangaroo Island and Flinders Ranges.

South Australia's innovative, cost competitive and agile nature is luring more young talent, and the ability to rapidly scale and provide skilled workers in critical sectors has caught the attention of world-class companies.

We're forging global partnerships and leveraging our position as one of the most liveable and safest cities to grow the state and opportunities for everyone.

There's a strong commitment to collaboration among industries with specialist precincts, such as the Tonsley Innovation District and Lot Fourteen encouraging companies to thrive.

- **Shortest daily work commute of the major mainland cities – 21% less than Sydney<sup>14</sup>**
- **One of the lowest cost of living capital cities in Australia<sup>15</sup>**
- **Adelaide's median house price is \$680,000 – 44% lower than Sydney<sup>16</sup>**

<sup>14</sup> Melbourne Institute: Applied Economic & Social Research, The Household, Income and Labour Dynamics in Australia Survey

<sup>15</sup> Mercer 2023 Cost of Living city ranking – Sydney 58, Melbourne 67, Brisbane 84, Perth 97, Adelaide 102

<sup>16</sup> Australian Bureau of Statistics, March quarter 2023



**Riverbank Precinct, Adelaide**  
Image courtesy of Olivia Dowling





*East End Unleashed, Adelaide CBD*  
Image courtesy of Joseph Nes



# The South Australian lifestyle

There is a year-round calendar of major, regional and community events and festivals, complemented by blockbuster one-off events to ensure a balance across the year. The events calendar features international and national drawcards which include the Australian Masters Games, WOMADelaide and Illuminate Adelaide. Additional well-known cultural and arts events complement the calendar which includes Tasting Australia, Adelaide Fringe, Adelaide Cabaret Festival, Adelaide Festival, CheeseFest, OzAsia Festival and regional gourmet wine and vintage festivals. South Australia also hosts globally renowned sporting events including LIV Golf Adelaide, winner of the World's Best Golf Event of the Year 2023 at the world golf awards, cycling's Tour Down Under, Adelaide 500 car race, Adelaide Motorsport Festival and the Adelaide Rally.

Our Mediterranean climate – hot, dry summers and mild, wet winters – enables an exciting outdoor lifestyle. South Australia also hosts globally-renowned sporting events including LIV Golf Adelaide, winner of the World's Best Golf Event of the Year 2023 at the world golf awards.

Adelaide's coastline stretches more than 30 kilometres, delivering wide, golden beaches with clean seas for swimming, kayaking, surfing and more.

It's hard not to escape into nature with parks and walking trails everywhere.

Best of all, getting around Adelaide is effortless. Nothing is really more than 30 minutes away by car so it's easy to have a family, sporting and social life every evening and an action packed, or relaxing, weekend!

South Australia delivers a better, more affordable lifestyle and opportunities – whether in the city or suburbs, on the coast or in the hills.

- **Most affordable unit rents and third most affordable house rents of any Australian capital city<sup>17</sup>**
- **Affordable and accessible childcare**
- **Good public transport and no toll roads**
- **Great public and private schools**
- **Adelaide's three public universities are ranked in the top 1% of the estimated 26,000 higher education institutions in the world.<sup>18</sup>**

<sup>17</sup> Domain Rental Report, June 2023

<sup>18</sup> Source: Times Higher Education World University Rankings 2024 and qs.com

**Garden of Unearthly Delights**  
Image courtesy of South Australian Tourism Commission





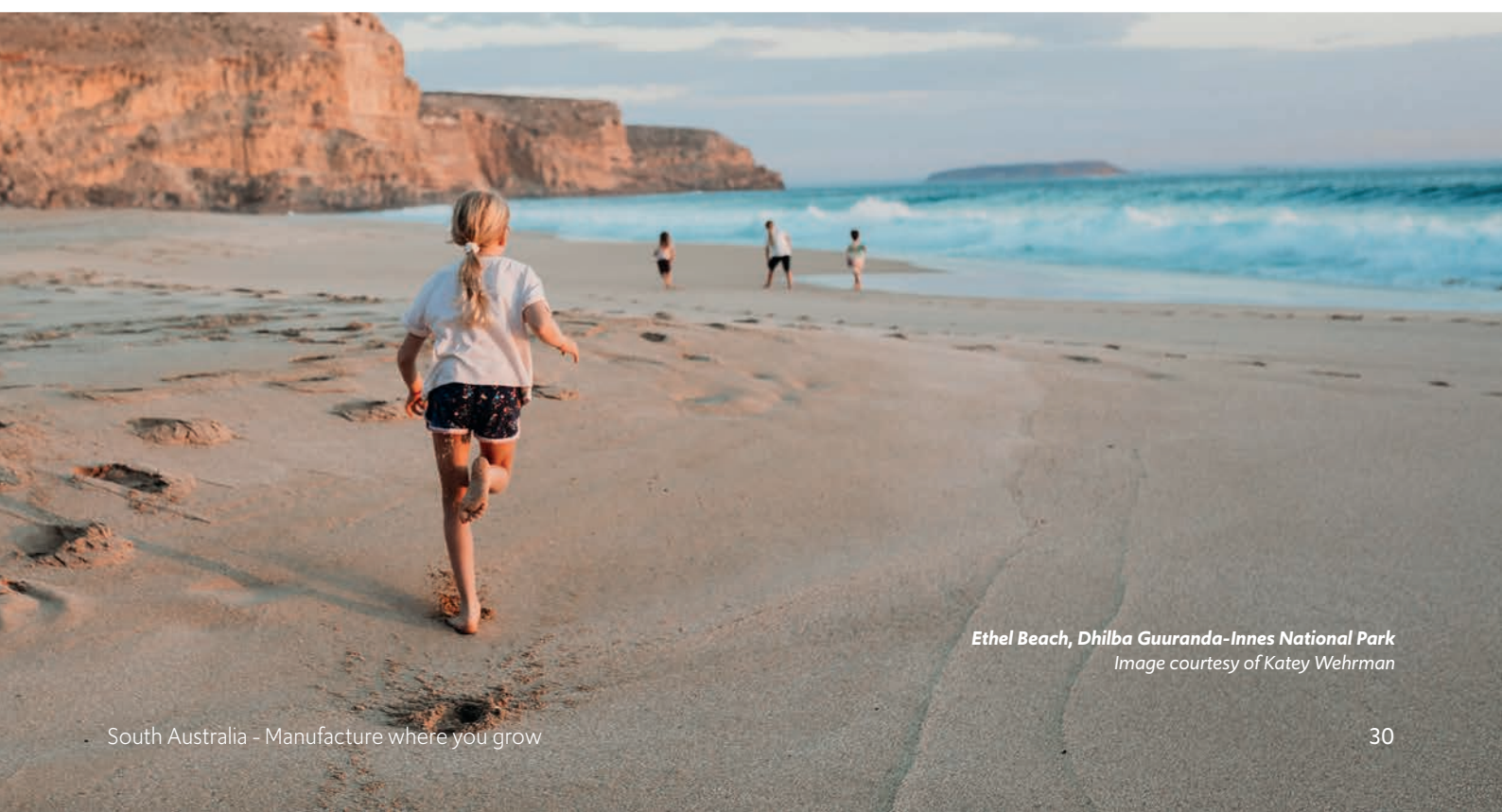
**d'Arenberg Cube, McLaren Vale**  
Image courtesy of South Australian  
Tourism Commission/  
d'Arenberg Cube



**WOMADelaide**  
Image courtesy of Grant Hancock



**LIV Golf Adelaide**  
Image courtesy of Chris Trotman/LIV Golf



**Ethel Beach, Dhilba Guuranda-Innes National Park**  
Image courtesy of Katey Wehrman

# Let's talk

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