

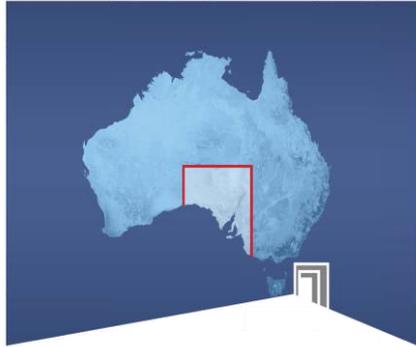


Government of South Australia

Department for Trade, Tourism
and Investment

SOUTH AUSTRALIA – AGRIBUSINESS OPPORTUNITIES

South Australia : A Snapshot

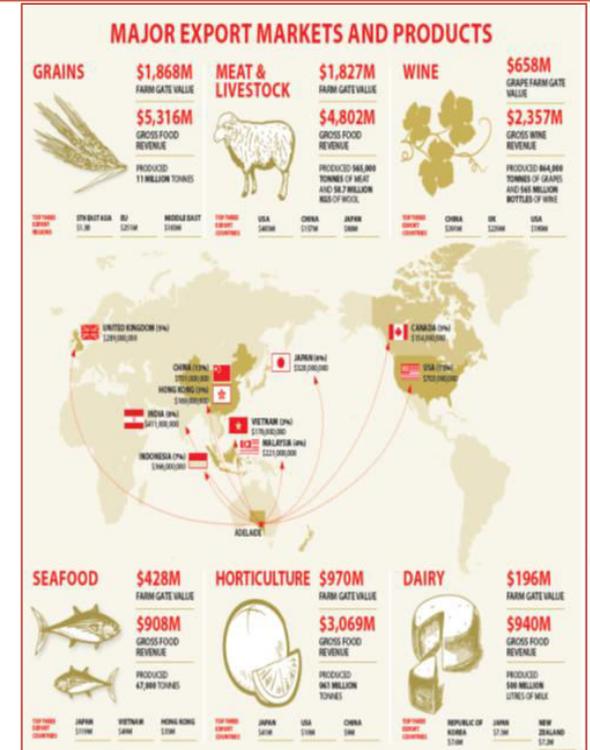


- **Population:** 1.6 Million (1.2 Million).
- Ranked **the most competitive city in Australia**, moving ahead of Melbourne, (KPMG 2016 Competitive Alternatives Report).
- Ranked **5th in the most liveable city** in the world (EIU).
- **Labour costs, land and taxes** are significantly lower than other Australian states.
- Exports: **\$ 15.4 Billion** (Sep 2017). India the **4th largest export market**.



South Australia: Agribusiness Overview

- A vital part of state's economy (largest export sector and a major employer).
- 2016-17: Generated AUD 22.5 billion in revenue and accounted for 57% of the state's merchandise exports.
- Main export markets are China, Japan, Malaysia, Singapore and South Korea.
- Food and Wine Exports to India include:
 - grains (AUD 392,438,913) & horticulture (AUD 14,057,276)
 - almonds (AUD 13.1 Million)
- India is amongst the largest market for a range of pulses and a growing market for wheat.
- Status as a producer of premium food and beverages from a clean environment is supported by robust systems for biosecurity, environment protection and food safety.
- South Australia is the only Australian mainland state that is free of fruit fly, and one of the few places in the world free of the vine destroying pest '*phylloxera*'.
- Pernod Ricard, Kirin Group Holdings, Mondelez International, Coca Cola, JBS, Ingham's, Cargill, Thomas Foods International, Beerenberg Gourmet Foods, Maggie Beer and Bickford Beverages.



South Australia: Production Regions

Eyre & Western

(Annual Output: AUD 1.5Billion)

Wheat, Barley & Aquaculture

Far North

(Annual Output: AUD 139 Million)

Meat & Wool

Limestone Coast

(Annual Output: AUD 1.3 Billion)

Dairy, Meat, Wool, Wine, Fruits
and Vegetable

Adelaide Hills, Fleurieu & Kangaroo Island

(Annual Output: AUD 834 Million)

Dairy, Almonds, Fruits and
Vegetables, Beer, Ciders, Wine

York & Mid North

(Annual Output: AUD 1.8 Billion)

Cereals, Pulses, Poultry, Meat &
Wool

Murray & Mallee

(Annual Output: AUD 2 Billion)

Almonds, Citrus, Stone Fruit,
Wine, Vegetables

Barossa & Lower North

(Annual Output: AUD 768 Million)

Wine, Fruits & Vegetables, Dairy

South Australia: Research, Education & Training

- A strong culture of innovation and collaboration between industry and research in agribusiness.
- The **South Australian Research and Development Institute (SARDI)**: South Australian Government's principal research institute – an extensive network of state-of-the-art research centres, laboratories and field sites across the State. A national leader in the areas of grains, seafood (wild fisheries and aquaculture), wine grapes, food and nutrition, climate adaption, poultry and animal welfare.
- **Waite Research Precinct**: Aims to contribute solutions to the emerging challenges of global food security and agriculture sustainability. 80% cereal production is from varieties developed at Waite. Home to 17 research organization, centres and nodes. 1500 scientists, technicians, teachers, students and supporting staff.
- In April 2018, **The Fight Food Waste Cooperative Research Centre (CRC)** was launched in South Australia. The CRC will support industry-led collaborations between researchers, industry and the community to address the issue of food waste. It aims to tackle the growing international problem of food waste by reducing waste throughout the supply chain, transforming unavoidable waste into innovative high-value co-products, and engaging with industry and consumers to deliver behavioural change.
- **Northern Adelaide Irrigation Scheme (NAIS)**: To deliver large volumes of affordable recycled water to the Northern Adelaide Plains through the Northern Adelaide Irrigation scheme. NAIS will help to transform the region into the national leader in intensive, high tech food production.

South Australia: Opportunities

- **Opportunities In Agribusiness:** Grains & Pulses, Seafood, Beverages, Dairy, Ready To Make Foods, Processed Food, and Horticulture.
- Asia Pacific (including India) is the fastest growing market for luxury foods – factors includes rapid economic growth and significant wealth disparities.
 - South Australia has diverse climatic conditions and an abundance of natural resources, and varied production systems, including small specialist farms, which are highly suitable for nice products. These niche products can be developed further into luxury food categories. An emerging consumer interest across Asia (primarily China, Japan and India), for the manufacture of luxury chocolates for gifting. This segment is traditionally dominated by European brands, however, South Australia has a local capability and traceability mechanisms in place to meet this market opportunity.
- India is an emerging market for luxury tourism within South Australia (to attract high net worth individuals) with luxury wine driven culinary tourism offerings.
- Business engagements across the agribusiness value chain.

Success Snapshots : Case Studies

Costa Mushrooms

- **Industry Sector:** Horticulture
- **Expansion of mushroom production facilities**
- **Investment:** \$60 Million
- **Jobs:** 200

Big River Pork

- **Industry Sector:** Food & Agribusiness
- **Expansion to enhance production**
- **Investment:** \$14 Million
- **Jobs:** 140 Ongoing + 46 New

Sundrop Farms

- **Industry Sector:** Horticulture
- **Sustainable horticulture in arid environment, growing high value crops using seawater and sunlight (350 tonnes of tomato each week).**

South Australia: India Representation





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