

# South Australia Partnering for growth





South Australia is not just a great place to invest; it is also the easiest, thanks to Invest SA.

With a deep and broad understanding of the state and its areas of competitive advantage, Invest SA understands the needs of investors and local businesses and has the expertise to create those vital links between the two.

By building industry, government and academic alliances in global growth areas Invest SA drives inbound international and national investment into South Australia, in Minerals and Energy, Defence and Space, Health, Critical and Emerging Technologies, Creative Industries, Food, Wine and Agribusiness, Green Economy, Tourism and more.

And it does this by drawing on the knowledge and expertise of dedicated professionals with experience in supporting companies with expansion or relocation plans across multiple sectors.

Invest SA is building upon South Australia's internationally recognised sustainability credentials to make the most of the economic opportunities already before us as we capitalise on the global green transition.

Alongside the historic AUKUS agreement, local investment in research capability and infrastructure in priority disciplines will drive the transformation of the economy and unlock new opportunities for generations of South Australians.

Truly, this is a time of extraordinary opportunity for South Australia, and the decision to bring Invest SA back demonstrates this government's commitment to creating a forward-focused, business-friendly investment environment within a culture that encourages entrepreneurship, innovation and collaboration.

And in so doing, Invest SA is itself investing in the future of SA: helping create the dynamic business sector and skilled workforce the state needs to realise its incredible moment of potential.

With peerless local knowledge and a passion for our beautiful state, Invest SA is the obvious first port of call for any company ready to get excited by the incredible opportunities South Australia offers.

## **Peter Malinauskas MP** **Premier of South Australia**



By working with the Invest SA team, businesses are supported to capitalise on investment opportunities.

Invest SA is focused on identifying key investment targets to build out high-value ecosystems in South Australia, growing the state's economy. Its mandate is to drive inbound international and national investment into South Australia – leveraging the state's competitive strengths and competencies.

Consisting of a team of investment and business development professionals, with deep sector knowledge and strong industry networks, Invest SA also extends its remit to the development and delivery of key strategic investments and projects.

The team amplifies the Government of South Australia's attraction of external investment into economic priority areas to create long-term sustainable economic growth.

South Australia is a place where our sectors co-exist in innovation districts and research centres, creating a place of connection for future-focused industries and bringing together collaborative ecosystems that open doors and inspire new ways of thinking.

By partnering with investors, Invest SA discovers opportunities in South Australia that leverage the state's competitive advantages and provide the potential for entrepreneurship and innovation to drive the next generation of business opportunities.

## **Nick Champion MP** **Minister for Trade and Investment**

# Contents

<b>Our strengths = your opportunity</b>	3
<b>Introducing South Australia</b>	4
<b>Minerals and energy</b>	5
<b>South Australia - the defence state</b>	9
<b>South Australia - the space state</b>	10
<b>Connected health innovation</b>	11
<b>Critical and emerging technologies</b>	13
<b>Creative industries</b>	15
<b>Food, wine and agribusiness</b>	17
<b>Green economy leadership</b>	19
<b>Tourism</b>	21
<b>Australia's most cost competitive city</b>	24
<b>Innovation districts</b>	25
<b>Advantage Adelaide – live, work &amp; play</b>	27
<b>The South Australian lifestyle</b>	29

## Key investment sectors in South Australia

Invest SA is a dedicated team of investment and business professionals within the Department for Trade and Investment, the only agency that can connect you with opportunities, industry networks, and other government agencies in the following sectors in South Australia:

- Minerals and energy
- Defence
- Space
- Health
- Critical and emerging technologies
- Creative industries
- Food, wine and agribusiness
- Green economy
- Tourism

# Our strengths = your opportunity



## Renewable energy powerhouse

Global leader in integrating wind, solar and battery energy systems into the state's energy network with up to 73% of the state's energy produced through wind and solar.



## World-class renewable and mineral resources

World-leading green credentials and global leader in wind and solar electricity production. Global leader in critical mineral exports with world's largest zircon mine and 66% of Australia's graphite and cobalt, and substantial resources of heavy rare earth elements.



## World-leading AI and data capability

Globally competitive research and development in artificial intelligence (AI), virtual reality (VR), quantum and data analytics leadership. Top six in the world for computer vision research.



## Australian Cyber Collaboration Centre

Central connection point for cyber resilience improvement.



## Adelaide BioMed City investment of AUD\$3.8 billion

Home to expertise and capabilities that bring together organisations from health and life sciences across clinical care, research, education, government and industry to drive bench-to-bedside innovation.



## Largest concentration of world-class agricultural research in the Southern Hemisphere

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



## Collaborative research and innovation ecosystem

Collaborative technology research and innovation ecosystem, linking world-leading research and development to a skilled workforce to build next generation technology products and services.



## Network of innovation districts and hubs

Lot Fourteen, Tonsley Innovation District, Adelaide BioMed City, Edinburgh Defence Precinct, Osborne Naval Precinct and Technology Park Adelaide.



## Circular economy innovation

Recognised as a world-leader in waste management, South Australia has led the nation's recycling and resource recovery performance since 1977.



## Robust biosecurity frameworks and traceability systems

Global reputation for producing clean, green and safe food.



## Cloud infrastructure

Twenty-four colocation data centres, 177 cloud service providers, 24 network fabrics and 50 service providers.



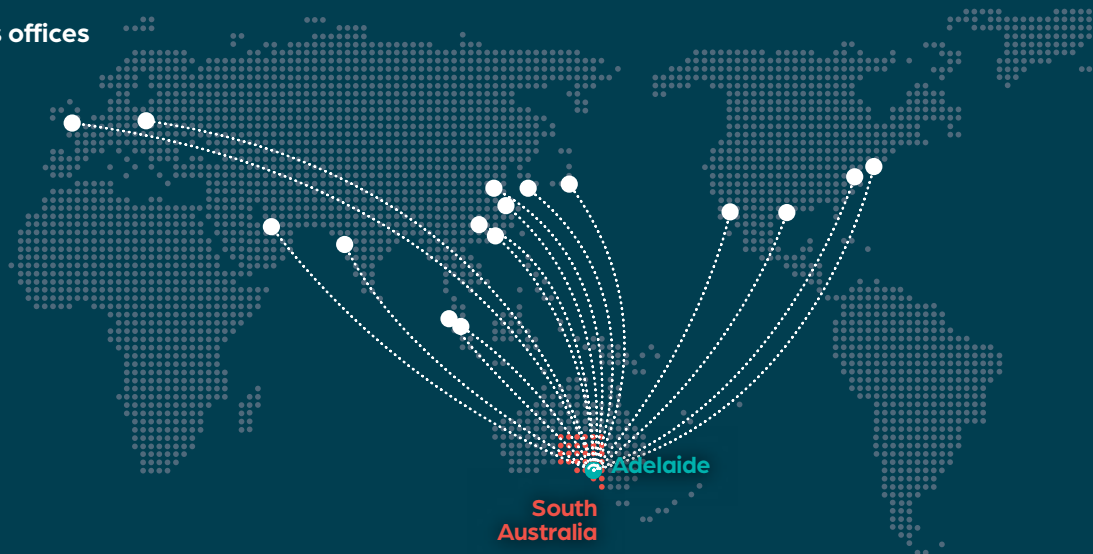
## Exceptional connectivity

Ten Gigabit Adelaide, GigCity and SABRENet - high reliability, low latency optic fibre connectivity throughout greater Adelaide.

# Introducing South Australia

<b>Trusted global partner</b>	Stable government with strong policy frameworks and green economy leadership.
<b>Skilled workforce</b>	A suitably skilled and scalable workforce with the highest retention rate in Australia based on 5+ years in current main job. <i>Source: Australian Bureau of Statistics, February 2023</i>
<b>Centrally located</b>	Centrally located and globally connected; shared borders with all mainland states with existing infrastructure corridors. UTC +9:30 hours time zone; favourable time zone to the Asia-Pacific region
<b>Capability</b>	Industry contributing products and services into global and local supply chains for the build and sustainment of defence and space projects. Focus on Industry 4.0 technology development including Lot Fourteen, Tonsley Innovation District and Technology Park. Investment in highly-skilled workforce to deliver major projects. A strong geographical position to support polar and sun-synchronous launch services.

## ● 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

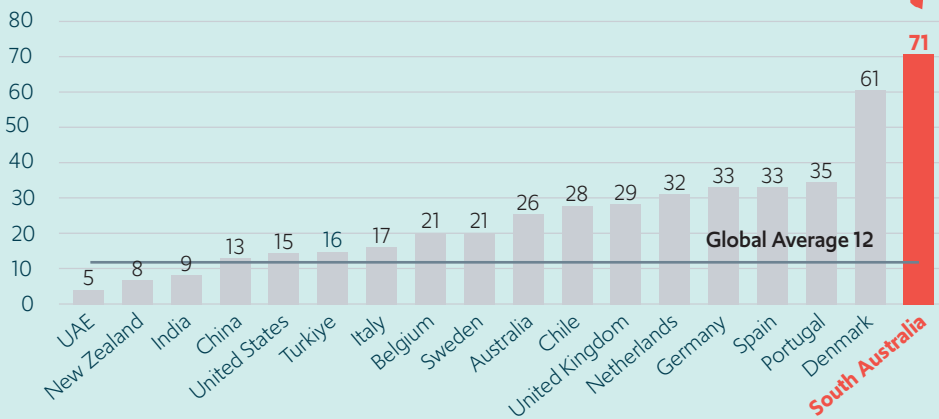
# Minerals and energy – South Australia, clean energy powerhouse

Invest with Australia’s renewable energy, hydrogen and minerals capital

South Australia ranked **number one globally** for annual renewable energy

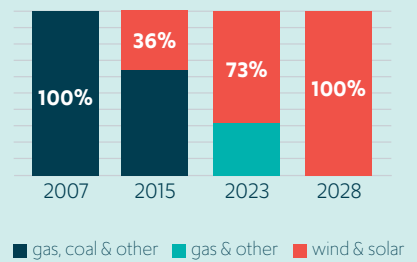


% share of wind and solar in electricity generation by market, 2022



Source: opennem.org.au

On track for net 100% renewables by 2030



South Australia is becoming a Green Hydrogen superpower and is delivering the Hydrogen Jobs Plan (250MWe electrolyser and 200MW Power Plant) to enable the industry to follow quickly.

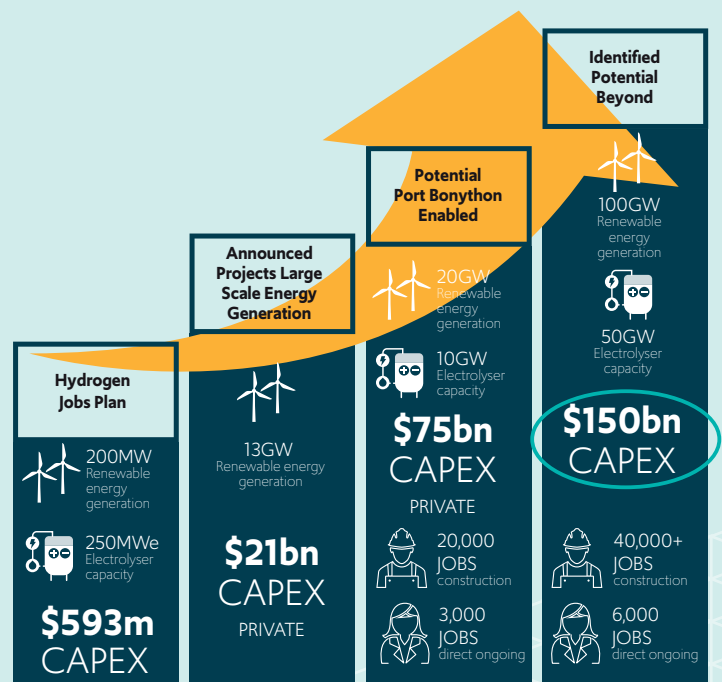
## Hydrogen unlocks value

South Australia is an international leader in integrating wind, solar and battery energy systems into the state’s energy network. In 2023, 73% of South Australia’s electricity generation came from wind (48.5%) and solar (24.5%).

Abundant wind and solar resources, land availability, existing and developing infrastructure, and skills combine to place South Australia in prime position to be a world-class producer, user and exporter of hydrogen.

It is estimated there are over 100GW of wind and solar resources in South Australia with further development potential – that’s more than 13 times the amount of electricity the state currently generates.

Our low-cost power, reputation for innovation and world-leading regulatory system is leading the decarbonisation of industry and modern manufacturing opportunities.





## South Australia is rich in mineral resources and is the rising force in Green Minerals.

South Australia is a global leader in critical mineral exports, with the world's largest zircon mine, Jacinth-Ambrosia. The state also holds 66 % of Australia's graphite and cobalt resources, which are crucial for lithium battery production, and has substantial resources of heavy rare earth elements used in high temperature magnets.

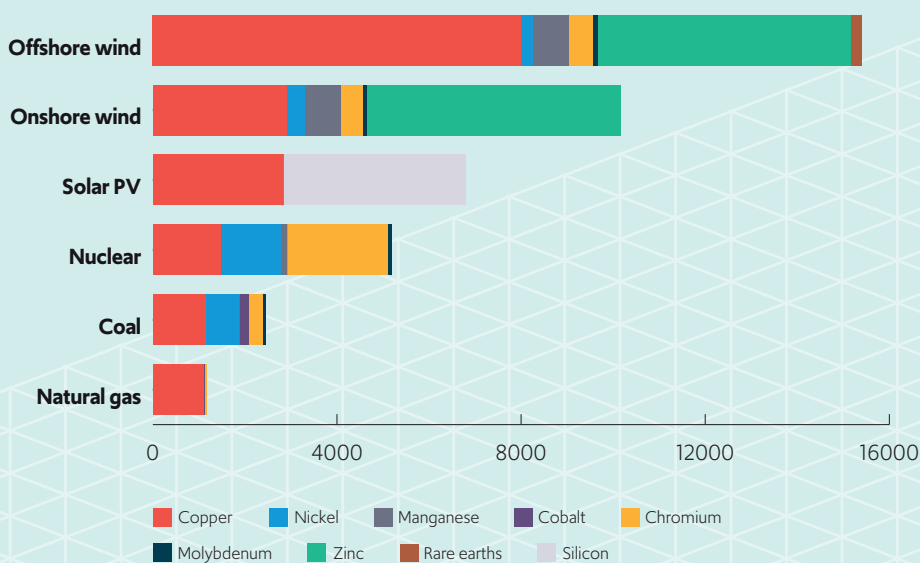
Demand for minerals, such as copper, cobalt and graphite, will grow quickly as the global energy transition gathers pace. This demand will create significant opportunities for South Australia due to our critical mineral reserves and our reputation as a trusted and reliable supplier.

South Australia has huge potential to play an important role in industry supply chains; with the available magnetite for the steel industry, high-purity alumina for a range of technologies and the manganese and silicon resources as the main alloying elements used in carbon steel production.

The Government of South Australia supports the Australian Government's vision for strengthening Australia's sovereign capabilities and increasing the capacity of downstream manufacturing. We are keen to contribute through our streamlined regulatory framework and capabilities, while adding value domestically, rather than exporting the high-value raw materials as unprocessed commodities.

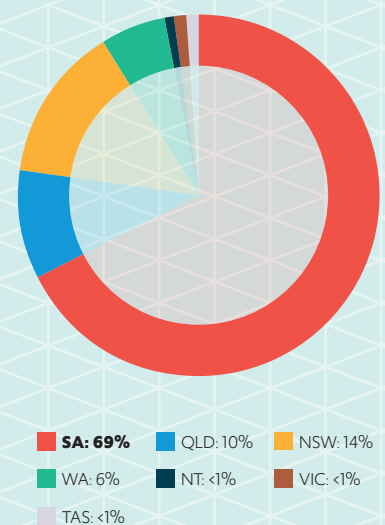
**The Government of South Australia recognises the link between mining and renewable energy. This link is critical to the world's net-zero emissions future.**

### Minerals used in clean energy technologies compared to other power generation sources



Source: IEA (2021), *The Role of Critical Minerals in Clean Energy Transitions*

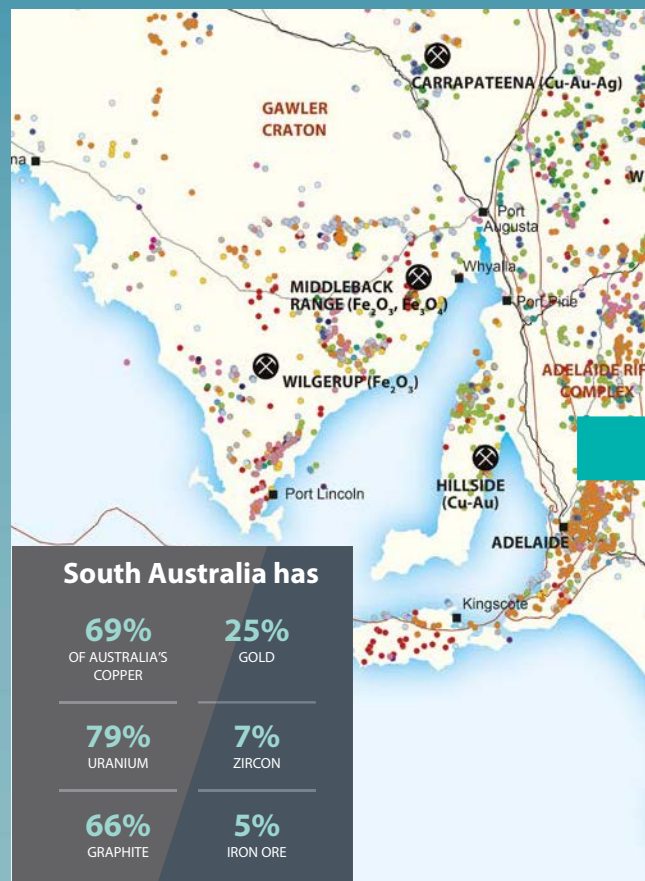
### South Australia contains 69% of Australia's economic demonstrated resources of copper



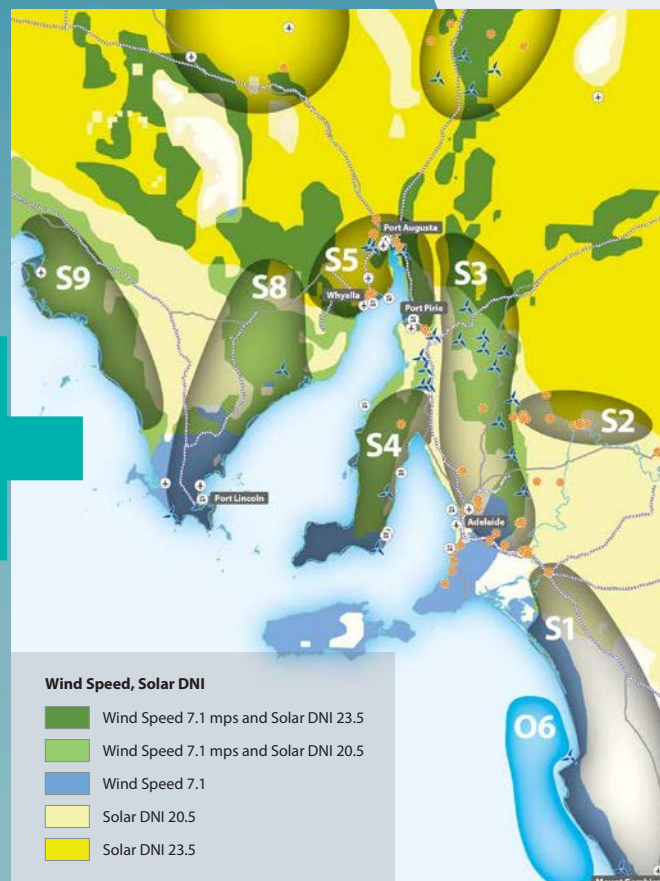
Source: Geoscience Australia

# South Australia is set for the decarbonised future

## Mineral resources



## Renewable Energy Zones (REZ)



Port Augusta Renewable Energy Park



## Infrastructure corridors



## Energy hubs



## Developing South Australia's net-zero carbon future

1. On track to reach **100% renewable** generation by 2030.
2. Rising force for **green minerals** (copper, magnetite, graphite, cobalt, zircon and rare earth elements).
3. Renewable **hydrogen superpower** by delivering the 'Hydrogen Jobs Plan' (250MWe electrolyser + 200MW power plant + storage facility) and supporting hydrogen hub developments at Port Bonython and Cape Hardy.
4. The Northern Water project will unlock growth in mining, defence, hydrogen and pastoral industries, in regions **critical to achieving net-zero** targets, through construction of a seawater **desalination plant** that connects up to a 600 kilometre transfer pipeline from the Spencer Gulf to northern South Australia.

# South Australia – the defence state at the forefront of the nation's defence

Hobart Class Air Warfare Destroyer  
Image courtesy of Defence SA

Renowned for innovation, world-class research and development, and a highly-skilled workforce, South Australia holds a significant proportion of Australia's total in-country defence materiel spend.

#### Benefit from our:

- global supply chain
- access to prime contractors
- strategic intelligence, test and evaluation facilities
- reconnaissance capabilities
- world-leading capabilities in artificial intelligence (AI), data analytics and cyber security.

South Australia's defence programs benefit from a highly connected and coordinated defence and space ecosystem located in critical technology precincts and industry clusters.

#### Home to defence programs including:

- Arafura Class Offshore Patrol Vessels
- Hunter Class Frigates
- Collins Class Submarines
- Jindalee Operational Radar Network
- P-8A Poseidon Maritime Patrol Aircraft
- Triton Unmanned Aircraft System
- Hobart Class Air Warfare Destroyers.

## AUKUS partnership

AUKUS is a trilateral security partnership for the Indo-Pacific region between Australia, the United Kingdom and the United States.

Australia and the UK will work to deliver SSN-AUKUS, a new conventionally-armed, nuclear-powered submarine based on a UK design and incorporate cutting edge technology from the three nations.

The UK will deliver its own SSN-AUKUS in the late 2030s, with the first SSN-AUKUS built in Australia to be delivered in the early 2040s.

Work has begun on the development of new submarine construction infrastructure at the Osborne Naval Shipyard including site identification and design, land transfer discussions, civil works and prototype facilities.

In support of this endeavour, an Office for AUKUS has been established by the Government of South Australia to co-ordinate the state's preparations and provide a key point of contact for Commonwealth agencies and high level inter-governmental relations.

- AUD\$2 billion expected investment over next four years
- Up to 4,000 workers employed to design and build the construction yard infrastructure
- Additional 4,000-5,500 direct jobs to build the nuclear-powered submarines at program peak

# South Australia – the space state

**“The space sector (and defence) in South Australia is thriving and is well-supported by the Government of South Australia and a range of other organisations.”**

Mr Lloyd Lopez, CEO at Hex20

With over 100 space organisations in Adelaide, South Australia has a dynamic space ecosystem that includes upstream and downstream organisations hosting a mix of primes, international organisations, notable private investors, companies, start-ups and research institutions that are developing space technologies and attracting global attention and investment.

**South Australia has the capability and supply chain to deliver a competitive advantage in space, supported by a vibrant, world-leading research and education sector.**

End-to-end capabilities include:

- satellite sensor and component manufacturing
- launch vehicle manufacturing and launch services
- mission services including the Australian Mission Control Centre
- software integration, data analytics and AI.

South Australia has a long and established heritage in ground operations relative to space, with Nova Systems operating a common-user Space Precinct on a 21-hectare site near Peterborough to track Low Earth Orbit (LEO) and Medium Earth Orbit (MEO) small satellite missions.

## Australian Space Agency

Putting South Australia at the centre of the national space industry, the Agency aims to increase the space sector to AUD\$12 billion and create up to 20,000 additional jobs by 2030.

## SmartSat Cooperative Research Centre

The AUD\$245 million Centre, headquartered in Adelaide, is Australia’s leading space research project. It brings together the Australian Government, state governments and industry partners from around Australia and the world, with a focus on advanced satellite systems, communication technologies and next generation earth observation data services.

## Space manufacturing capability

The Government of South Australia is investing AUD\$20 million towards local space manufacturing capability, with plans underway to accelerate the development of space innovation into real world commercial technologies. Industry will have access to world-class equipment capable of small satellite and component manufacturing, assembly, integration and test activities.

## Plants for Space

An international research consortium building novel solutions for long term space habitation and on Earth sustainability. Led by the University of Adelaide, the new research centre will focus international expertise on finding ways to provide the next generation of space explorers with nutritious foods and the on-demand supply of materials and medicine.

## Space Incubator Program, Venture Catalyst Space

Initiated by the South Australian Space Industry Centre and delivered through the University of South Australia’s Innovation and Collaboration Centre, the program supports new start-up founders to nurture and grow ideas within the space sector.

# Connected health innovation

Adelaide's flagship innovation precincts bring together institutes and centres from health and life sciences, clinical care, research, education and industry.

Adelaide BioMed City, Tonsley Innovation District and Lot Fourteen embed South Australia's health and life sciences, manufacturing and hi-tech ecosystems into our health and life sciences sector.

## Artificial intelligence and digital health

South Australia's collaborative ecosystem brings together hi-tech hospitals and innovation precincts, unique data sets and data infrastructure, with leading artificial intelligence (AI) and data analytics capabilities to provide an ideal location for digital and precision health innovation.

Global tech and pharma companies are developing projects in Adelaide to tap into this ecosystem for frontier technologies such as quantum, augmented reality (AR), virtual reality (VR), and artificial intelligence (AI).

Our innovation clusters enable collaboration between companies, clinicians, universities, infrastructure and workforce to drive digital health.

## Unique innovation infrastructure

The state has a unique longitudinal clinical dataset consisting of a centralised electronic medical record with a single identifier for each patient across a universal healthcare system for 1.7 million people. This is matched by biospecimen resources, offering opportunities for longitudinal insights for data-driven health innovation.



## End-to-end clinical trial capabilities

Our expertise provides an efficient pathway to clinical trial conduct and pharmaceutical/GMP manufacturing, making South Australia a strategic entry point for exploring the Australian trials sector.

### Start in South Australia to leverage the Australian Advantage

#### SPEED

- Efficient regulatory framework saves up to one year in regulatory timelines.
- Investigational new drug application (IND) not required.

#### QUALITY

- Globally accepted data with the highest quality standards for submission to regulatory agencies including the US FDA, UK HMRA, EU EMA and Japan PDMA.

#### VALUE

- 43.5% R&D tax incentive.

### South Australian Advantage

Australia's most experienced providers operate in South Australia, creating the nation's most comprehensive, connected and supportive clinical trial ecosystem providing support across the entire supply chain:

- Local ethics approval and an advanced ecosystem allows you to start trials in five to six weeks.
- Save by collaborating with experienced partners, providing specialist advice for you to operate efficiently, de-risk and add value to your trial exploration, setup and conduct.

Our globally unique ecosystem provides a trusted and connected environment for you to partner and innovate, maximising value for your organisation.

## Pioneering medtech innovation and commercialisation

Medtech in South Australia benefits from access to critical technology capabilities such as AI, opening up data driven and precision opportunities from product development through to manufacturing.

The state's clinical trials capabilities are Australia's most comprehensive. Service providers work together to support device companies on their clinical trial journey.

## Pharmaceutical manufacturing

Australia's commercial drug manufacturing pedigree was forged in South Australia and features many of its leading academic manufacturing resources and long-established commercial operations.

Our contract development manufacturing organisations (CDMO) support accreditation for global regulators from R&D through to commercial scale, with capability and breadth across small and large molecules.

Adelaide is home to global operations for pharma and nutraceutical therapeutics, generics and supplement manufacturers.

# Critical and emerging technologies

## Artificial intelligence

South Australia's collaborative ecosystem brings together dominant data and artificial intelligence (AI) capabilities as the foundational building blocks for emerging cyber security, AI and data analytics knowledge generation and commercialisation. This powers transformative digital technologies across industry sectors.

### Australian Institute for Machine Learning

**Location:** Lot Fourteen, Adelaide Central Business District

The Australian Institute for Machine Learning (AIML) is part of the University of Adelaide. AIML provides AI capability for global brands including Amazon Web Services, Lockheed Martin Australia, BAE Systems, GSK and BHP Billiton.

Research themes: deep learning, computer vision and robotic vision, natural language processing and visual question answering, medical machine learning, space, defence and agriculture.

AIML is ranked in the top six worldwide in computer vision (*csrankings.com*) and is the top site in Australasia for AI research generally, with world-class expertise in AI, computer vision and deep learning.

### Centre for Augmented Reasoning

**Location:** Lot Fourteen, Adelaide Central Business District

Within AIML, the Centre for Augmented Reasoning leads the research and development of new advanced augmented systems and improves machine learning technology across a range of applications including:

- machines that continually learn new things while interacting with the environment
- machines that work with data analysts to optimise business processes
- machines that can ask people questions in ways that are more natural and easier than filling in forms
- robots that can understand and follow instructions from people and factories where people and machines work seamlessly together without the need for constant reprogramming of software.

### School of Computer and Mathematical Sciences

**Location:** The University of Adelaide, Adelaide Central Business District

Recognised for world-class computer science in the areas of computer vision, automation and control, and computer science with world-class expertise working to solve some of the most challenging societal problems in pioneering ways.

The School of Computer and Mathematical Sciences actively seeks research collaborations with industry through post-graduate student projects, student internships, short term consultancy projects and collaborative grant funding projects.

### MIT Adelaide Living Lab

**Location:** Lot Fourteen, Adelaide Central Business District

MIT Adelaide Living Lab is a collaboration with the Massachusetts Institute of Technology (MIT) supported by the Government of South Australia. The Lab facilitates data focused projects that rely on collaborative innovation consortiums to create next generation data infrastructure that have global applications.

### Industrial AI Research Centre

**Location:** University of South Australia, Adelaide Central Business District

University of South Australia's Industrial AI Research Centre brings together experts from across computer sciences to develop solutions for autonomous and augmented intelligence systems. Their researchers work with organisations around the world such as Siemens, BP Australia and Yokogawa Electric to design sophisticated AI-driven solutions.

### Interactive and Virtual Environments

**Location:** University of South Australia, Adelaide Central Business District

The Australian Research Centre for Interactive and Virtual Environments (IVE) is a world-leader in augmented reality (AR) and virtual reality (VR) and has produced the most AR papers of any institute or university in the world.

IVE is a unique alignment of computer science, engineering, art, architecture and design. IVE is responding to the challenge of increased global demand for AR and VR technologies, with leading research including wearable computing, interface design, empathic computing, 3D visualisation, perception and telepresence.

# Global technology companies in Adelaide for innovation

These leading technology companies continue to build around South Australia's connected technology ecosystem driving global businesses well into the future.

## **accenture**

"We are incredibly proud of the success of our Adelaide capability and our contribution to the growth of Australia's sovereign capabilities. Adelaide is a highly attractive destination for companies and first-class talent looking to deliver technological and scientific excellence and we are privileged to be a part of this momentum.

**Peter Burns,**  
CEO Accenture Australia and New Zealand

## **aws**

"Amazon Web Services recognise that South Australia has a rich community of both innovation and entrepreneurship, and we're excited to continue to support our customers and partners in South Australia out of our office in the innovation district of Lot Fourteen in Adelaide."

**Rianne van Veldhuizen,**  
Managing Director, Amazon Web Services ANZ

## **Deloitte.**

"We have chosen Adelaide as the home of our first Australian Centre for Innovation and Technology because we have enormous confidence in the South Australian economy and the exceptional talent market that exists in the region."

**Hendri Mentz,**  
Adelaide Office Managing Partner

## **NOKIA**

"Nokia is delighted to establish our National 5G Industrial Incubation Lab in South Australia, an important step forward to harnessing the power of 5G for all Australian industries."

**Andrew Cope,**  
Nokia Managing Director of Australia and New Zealand

## **cognizant**

"Adelaide's vision to become a centre for innovation and technology aligns with our focus to accelerate the digital agenda and sustainability ambitions of Australian businesses."

**Jane Livesey,**  
CEO, Australia and New Zealand

## **Microsoft**

"Having maintained a presence in South Australia for over 30 years, it has been wonderful to see the significant development of the local ICT industry over the last few years. Adelaide is fast becoming a hub for technology innovation and we're excited to continue our commitment to the state."

**Mark Cuggy,**  
State Manager, South Australia

## **MIT ADELAIDE LIVING LAB**

"We identified Adelaide early on as the prime location for a Living Lab in Australia and the Indo-Pacific region due to its leadership in data analytics and machine learning."

**Professor Alex 'Sandy' Pentland,**  
Massachusetts Institute of Technology

## **Commonwealth Bank**

"The focus on Cyber Security and AI within Adelaide and Lot Fourteen, and the depth of the local talent pool in these topics are big attractors for us. AI and data are key to the next generation of digital personalisation, and the local focus on Augmented Reasoning, in particular, is very exciting when we think about how we can use AI technology to better empower our staff to serve our customers."

**Brendan Hopper,**  
CIO for Technology, Commonwealth Bank of Australia

# Creative industries



**Elvis**  
Image courtesy of Rising Sun Pictures



## Rebates and incentives

Access competitive rebates and incentives to support the screen industry and business growth in South Australia.

## Games

South Australia was the first Australian jurisdiction to introduce a video game rebate demonstrating support of the industry to the local and international community.

### South Australian Video Games Development Rebate

Offered by the Government of South Australia.

**Rebate:** up to **10%**

**Eligibility:** development costs incurred in South Australia on eligible project expenditure with a minimum spend of **AUD\$250,000**

### Digital Games Tax Offset

Offered by the Australian Government.

**Offset:** up to **30%**

**Eligibility:** game development expenditure over **AUD\$500,000** from 1 July 2022

Games developers meeting eligibility criteria can access both incentives, up to 40%.

## Skilled talent pipeline

Government, universities, training providers and industry work together to advance the sector to meet current and future needs.

### Universities

Three world-class public universities, the University of Adelaide, University of South Australia and Flinders University, deliver undergraduate and post-graduate screen qualifications with purpose-built facilities providing the best the world has to offer.

## Screen

### Screen Production Fund

Provided by the South Australian Film Corporation to support production of outstanding scripted and unscripted content for any screen that generates significant economic outcomes for the South Australian screen industry.

**Funding:** up to **10%** of qualifying South Australian expenditure

**Key criteria:** project substantially produced and post-produced in South Australia

## Effects

### Post-Production, Digital and Visual Effects Rebate

Provided by the South Australian Film Corporation to develop the South Australian post-production, digital and visual effects sector by complementing the Australian Government's Australian Screen Production Incentive Producer Offset, Location Offset or PDV Offset.

**Rebate:** equivalent to **10%** of approved expenditure on post-production, digital and visual effects work, subject to available funds.

**Key criteria:** post-production, digital and visual effects (PDV) work undertaken in South Australia with a minimum expenditure of **AUD\$250,000**

### Specialist technical campuses

- Academy of Interactive Entertainment
- Adelaide College of the Arts
- CDW Studios
- Media Arts Production Skills (MAPS) Film School
- SAE Institute Adelaide

# Food, wine and agribusiness – manufacture where you grow

- Primary industries and agribusiness contribute AUD\$17.3 billion in revenue.
- 51% of South Australia's overseas exports are primary industries and associated processing.
- Nearly half of all manufacturing in South Australia is food and beverage manufacturing and machinery and equipment.<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.

**Premium raw ingredients,  
food and wine produced  
at scale in clean water,  
clean air and clean soil**



- **Internationally recognised** food safety record
- **Diverse sub-climates** including high-rainfall cool climate regions to warm, dry regions
- Largest concentration of **world-class agricultural research** in the Southern Hemisphere



## Grains and pulses

Harvested **8.4 million tonnes**

**Largest pasta manufacturer** in the Southern Hemisphere



## Meat, livestock and dairy

Produced **469,000 tonnes** of meat and **23.8 million** dozen eggs

**127 million** chickens processed

**56.1 million** kilograms of wool

Produced **490 million** litres of milk

**Highest average** milk volume per cow in the country



## Wine

Produced **805,852 tonnes** of grapes and over **570 million litres of wine**

Produce **80%** of Australia's premium wine

Produce **50%** of Australia's wine



## Horticulture

Produced **1.16 million tonnes**

**Largest climate-controlled** cropping area in the Southern Hemisphere

**80%** of Australia's fresh washed potatoes

Produced **200,000 tonnes** of citrus

Produced **31,000 tonnes** of almonds



## Seafood and aquaculture

Produced **73,000 tonnes**

**Internationally recognised** for world-class fisheries and aquaculture management supporting top quality sustainable seafood

Seafood capital of Australia, Port Lincoln has one of the **largest fishing fleets** in the Southern Hemisphere

**80%** of Southern Australian marine life occurs nowhere else in the world



## Forestry

South Australia **harvests 100% of its timber** from sustainable plantations.

Source: Primary Industries Scorecard 2021–22

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

Access to a diverse range of readily available quality raw materials at scale from primary producers in a variety of sub-climates as well as controlled environments, 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 (to Northern Hemisphere) reliable source of quality food commodities offering security of supply for domestic and international consumers and food and beverage manufacturers servicing the Asia-Pacific region.

## Manufacture where you grow

A major producer of high-quality raw materials, consistent agricultural and cropping regions, along with a well-established food and beverage manufacturing ecosystem, make South Australia an excellent location for agri-centric manufacturing. As the world looks to new technologies like precision fermentation to meet the food security of a growing global population, investors can leverage South Australia's significant fermentation capability and wider food manufacturing ecosystem, to scale up and deliver new food and beverage products.

Manufacturing where you grow in South Australia provides the perfect opportunity to capitalise on the state's strengths in renewable energy and green technologies to minimise carbon footprint.

## Robust food and beverage supply chain

An expansive agriculture 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 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, our significant local food manufacturing capability is well-connected, collaborative and can partner on new and innovative product development, commercialisation and contract manufacturing.

An innovative hub for agriculture and food technology.

## Robust biosecurity frameworks and traceability systems

Global reputation for producing clean, green and safe food backed by regulatory systems and technology. Sharing the South Australian provenance story to an increasing international market demanding unique, fresh and healthy options sourced from our pristine oceans and fertile soils.

# 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.

A circular economy is in South Australia's DNA – with high-performing household waste collection systems, food and organics recycling and over 90% of construction and demolition waste recycled into new products.<sup>2</sup>

South Australia has a long list of 'firsts' for advancing a circular economy, becoming the second state in the world and first in Australia to implement a container deposit scheme in 1977, 35 years before the next Australian jurisdiction. Since then, the state has gained praise for regulatory actions including a plastic shopping bag ban (2009) and recent single-use plastic ban on items such as plastic straws, cutlery, and plates (2020).

## Fight Food Waste Cooperative Research Centre

The Fight Food Waste Cooperative Research Centre, headquartered in South Australia, brings together industry, research and the community to move towards their vision of a nation without food waste.

Through their research and development programs, they engage with industry and consumers to reduce food waste across the supply chain and transform unavoidable waste into innovative products.

Global UK-founded climate action non-government organisation Waste and Resources Action Programme has its Asia-Pacific office located in Adelaide, in partnership with Fight Food Waste Australia.

## Climate independent water

The first and largest recycled water project of its type in Australia, the Virginia Pipeline Scheme remains the largest in the Southern Hemisphere and second largest globally. The project was established in 1997 to provide a reliable, climate-independent Class A source of water 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, cucurbits, peppers and bunch lines.

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

The location of NAIS combines a new climate and season independent water supply to leverage the region's suitability for agriculture (fertile soils, Mediterranean climate, proximity to transport and logistics, and access to skilled labour).

The infrastructure build managed by SA Water envisaged two stages (1A and 1B), to ultimately deliver 12 gigalitres per annum of climate independent recycled water to the region.

The first water from Stage 1A was delivered in February 2021, producing and distributing up to 6 gigalitres per annum of treated recycled water suitable for agricultural production. The NAIS trunk main has a full capacity of 20 gigalitres per annum to enable future growth.

<sup>2</sup> Source: Green Industries South Australia



## **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.

# Tourism – iconic experiences and natural wonders

There is significant opportunity to invest in new bucket-list experiences and premium accommodation infrastructure in Adelaide, South Australia’s capital, and its iconic tourism regions.

The number of world-class festivals, international sporting events and conferences in Adelaide and regional South Australia continues to grow, driving increased demand for accommodation.

Since 2020, 10 new international standard hotels providing a combined total of 1467 additional rooms have opened in Adelaide, with growing investment from international hotel brands. Ever-growing demand from leisure and business travellers maintain occupancy rates well above sustainable levels.

Further opportunities exist for additional hotel developments and the refurbishment of existing properties in key locations.

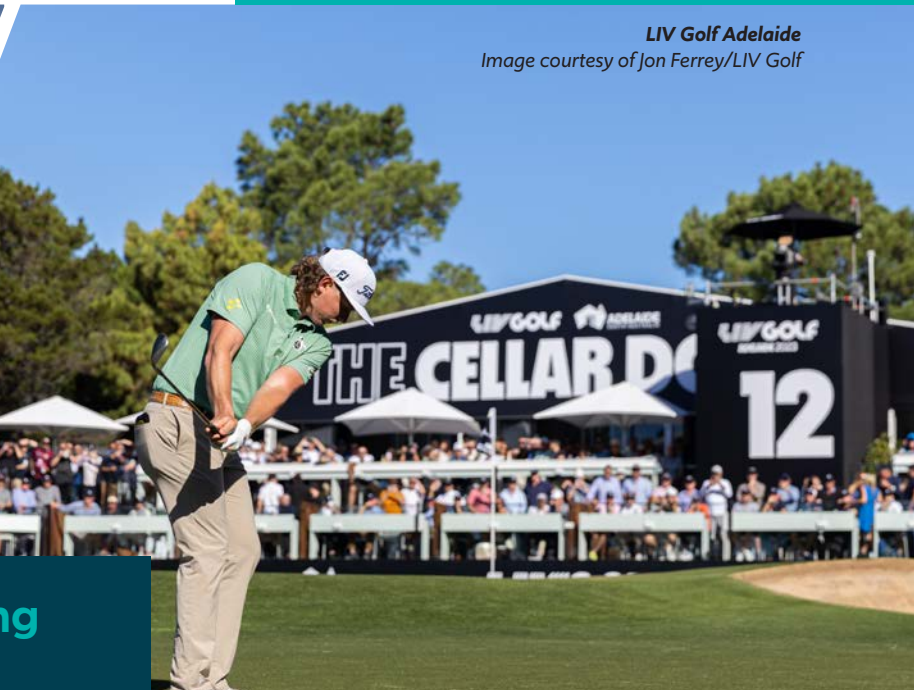
## Regional tourism is thriving

Diverse natural assets and iconic experiences see our regions primed for further investment opportunities.

Regional expenditure is 48 cents in every tourism dollar.



**Tour Down Under**  
Image courtesy of Meaghan Coles



**LIV Golf Adelaide**  
Image courtesy of Jon Ferrey/LIV Golf

## Regional drawcards driving visitor demand include:

- One of the Great Wine Capitals of the world – 18 wine regions
- Barossa Valley – world’s oldest Shiraz vines
- Shark-cage diving in Port Lincoln
- Snorkelling with giant cuttlefish on the Eyre Peninsula
- Flinders Ranges - 350 million years of near-continuous geological sequence
- Kangaroo Island – pristine wilderness
- Naracoorte Caves National Park World Heritage site.

- AUD\$9.95 billion expenditure<sup>3</sup>
- 36 million visitor nights<sup>3</sup>
- The State’s world-class year-round festival, sporting and leisure events calendar and conference seasons are driving the highest ever room nights occupied with occupancy rates reaching record levels of 90%.<sup>4</sup>

<sup>3</sup> Source: Tourism Research Australia, Year ending June 2023.

<sup>4</sup> Source: STR.



Iconic bucket-list attractions are increasing the length of visitor stays and demand for quality accommodation.

### **Monarto Safari Park**

Scheduled to open in early 2024, investor Gerry Ryan OAM is developing an AUD\$60 million luxury safari resort in a tourism partnership with Zoos SA. The development will include a Safari Resort with 78 hotel rooms, conference facilities, function and restaurant spaces, as well as luxury eco-glamping facilities with Lodge. Located just over an hour from Adelaide, the park attracted nearly 200,000 visitors last year following a AUD\$16.8 million upgrade to build a new visitor centre.

Monarto Safari Park is the largest open-range safari experience outside of Africa. The visitor experience includes the premium Lion 360 experience as well as the largest walk through lemur experience in the world. Monarto Safari park is a welfare accredited facility that is renowned for its role in conservation of critically endangered species.

### **Shell V-Power Motorsport Park at The Bend**

Located approximately 80 minutes from Adelaide, the AUD\$150+ million precinct offers further proof that regional South Australia is ideal for world-class tourism infrastructure and accommodation investment. Attracting an additional 339,000 visitors to the region annually since opening in 2018, the Shell V-Power Motorsport Park at The Bend includes a 7.77-kilometre racing circuit - one of the world's longest permanent circuits, second only to Nürburgring in Germany, the 100-room Rydges Pit Lane Hotel and BIG4 The Bend Holiday Park.

### **The Cliffs Kangaroo Island, Penneshaw Pub & Seafront assets**

As part of their investment across the state, Pelligra are investing heavily in tourism, particularly on Kangaroo Island. Partnering with the locally created Pennington Cliffs Property Trust and the Seafront Group, the joint venture will deliver one of the world's 'bucket-list' golfing destinations, The Cliffs Kangaroo Island in 2025. This development will include a world-class championship golf course, clubhouse, restaurants, proshop and practice facilities along with purpose built on-site accommodation. The Cliffs Kangaroo Island is expected to draw upwards of 40,000 tourists from across the globe in its first year.

The group has also acquired and operates a range of tourism assets on the eastern end of Kangaroo Island including the Penneshaw Pub & Bottle Shop, the Seafront Hotel and Seafront Caravan & Holiday Park. The Group plans to invest in all these assets to support their on-going development plans to provide much needed jobs, investment, accommodation, experiences and infrastructure on this iconic South Australian island.

**Kangaroo Island named Lonely Planet's #2 must visit global destination for 2024.<sup>5</sup>**

<sup>5</sup> Source: *The Guardian*, October 2023

**South Australian Health and Medical  
Research Institute (SAHMRI), Adelaide**  
*Image courtesy of Nam Le Photography*





# Australia's most cost competitive city

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

**South Australia is ranked first among all Australian states for ease of doing business<sup>6</sup>**

<sup>6</sup> Source: Cisco Australia Digital Readiness Index 2022

## Better, cheaper and less complicated

	SA vs VIC	SA vs NSW	SA vs QLD
Payroll tax threshold and rate <sup>7</sup>	Better	Better	Less complicated
Prime office net face rent (\$/sqm p.a) <sup>8</sup>	Cheaper	Cheaper	Cheaper
Prime industrial net face rent (\$/sqm) <sup>9</sup>	Cheaper	Cheaper	Cheaper
Industrial construction cost ranges (\$/sqm) <sup>10</sup>	Cheaper	Cheaper	Cheaper
Rent index <sup>11</sup>	Better	Better	Better
Local purchasing power index <sup>12</sup>	Better	Better	Better

### Better business tax breaks:

Zero payroll tax for wages under AUD\$1.5 million.

South Australia is the lowest taxing state on the mainland according to independent data provided by Victoria's Parliamentary Budget Office that showed each Victorian pays AUD\$5,073 a year in state taxes compared to AUD\$2,970 in South Australia.

Average wages are 8.7% below the national average, 8.4% lower than New South Wales and 8.5% lower than Victoria.<sup>13</sup>

Sources:

<sup>7</sup> Payroll Tax Australia

<sup>8</sup> Industrial rent and land costs. Source: Knight Frank Industrial Review Q2 2023

<sup>9</sup> Office rent costs. Source: CBRE Australian Office Space Costs - Q3 2023

<sup>10</sup> Industrial building costs source: Napier & Blakely - Up to 10m high warehouse - medium standard over 3,000 sqm - 2023

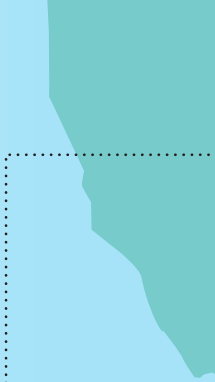
<sup>11</sup> Electricity prices. Source: Australian Energy Regulator - annual volume weighted average 30 minute prices, FY 2022-23

<sup>12</sup> Cost of living index, Rent Index, Local purchasing power index 2023 mid year; Source: Numbeo

<sup>13</sup> Source: Australian Bureau of Statistics, Average Weekly Earnings, Australia May 2023

# 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 CBD

Part of the University of Adelaide, 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.

## **Defence Super District** 34kms from CBD

Key national defence research, manufacturing and sustainment hub housing the RAAF Base Edinburgh, Defence Science and Technology Group and major defence companies.

## **Edinburgh Precinct** 34kms from CBD

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.

## **Osborne Naval Precinct** 26kms from CBD

Australia's largest naval shipbuilding hub incorporating a critical mass of world-class warship design and construction skills. Significant upgrades are slated to make it the most technologically advanced naval shipyard in the world.

## **Technology Park** 17kms from CBD

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 CBD

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.

## **The University of Adelaide** Adelaide CBD

With three main campuses in South Australia, and over 140 years of educational experience, recognised globally as a leading research university ranked in the world's top 100 universities. Distinguished alumni of five Nobel Laureates, over 100 Rhodes Scholars, including Australia's first Indigenous recipient, and Australia's first female prime minister and Supreme Court judge.

## **Lot Fourteen** Adelaide CBD

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.

## **University of South Australia** Adelaide CBD

Australia's University of Enterprise on the global stage; partnered globally and nationally with academic, research and industry leaders with six campuses. Offering degree programs including business, law, education, arts and social sciences, health sciences, information technology, engineering and the environment.

## **Waite Research Precinct** 7kms from CBD



Part of the University of Adelaide, 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.

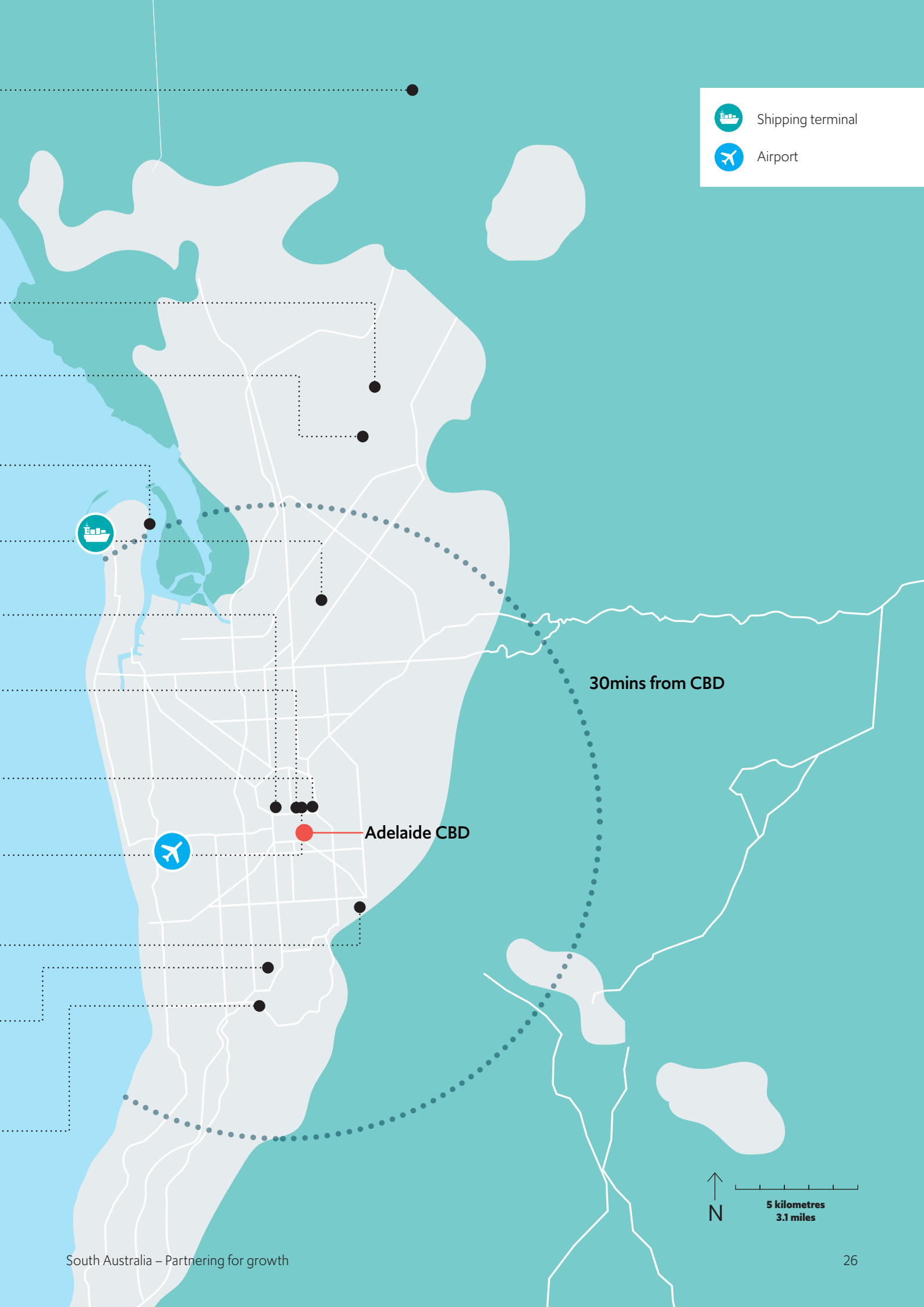
## **Tonsley Innovation District** 12kms from CBD

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 Line Zero Factory of the Future advanced manufacturing test bed, 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.

## **Flinders University** 13kms from CBD

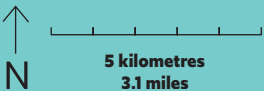
For over 50 years, Flinders has been a centre of inspiring achievement, from pioneering research and excellence in teaching to the positive impact the university has on the communities it serves. Three main campuses provide future-focused, internationally recognised degrees with flexible study options.

-  Shipping terminal
-  Airport



30mins from CBD

Adelaide CBD



# 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 large events, entertainment, culture and excitement. Some of the best known cultural and arts events include the Adelaide Festival, WOMADelaide, Tasting Australia, Adelaide Fringe, Adelaide Cabaret Festival and OzAsia Festival. South Australia hosts international and national sporting events including cycling's Tour Down Under and the Adelaide 500 car race.

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*



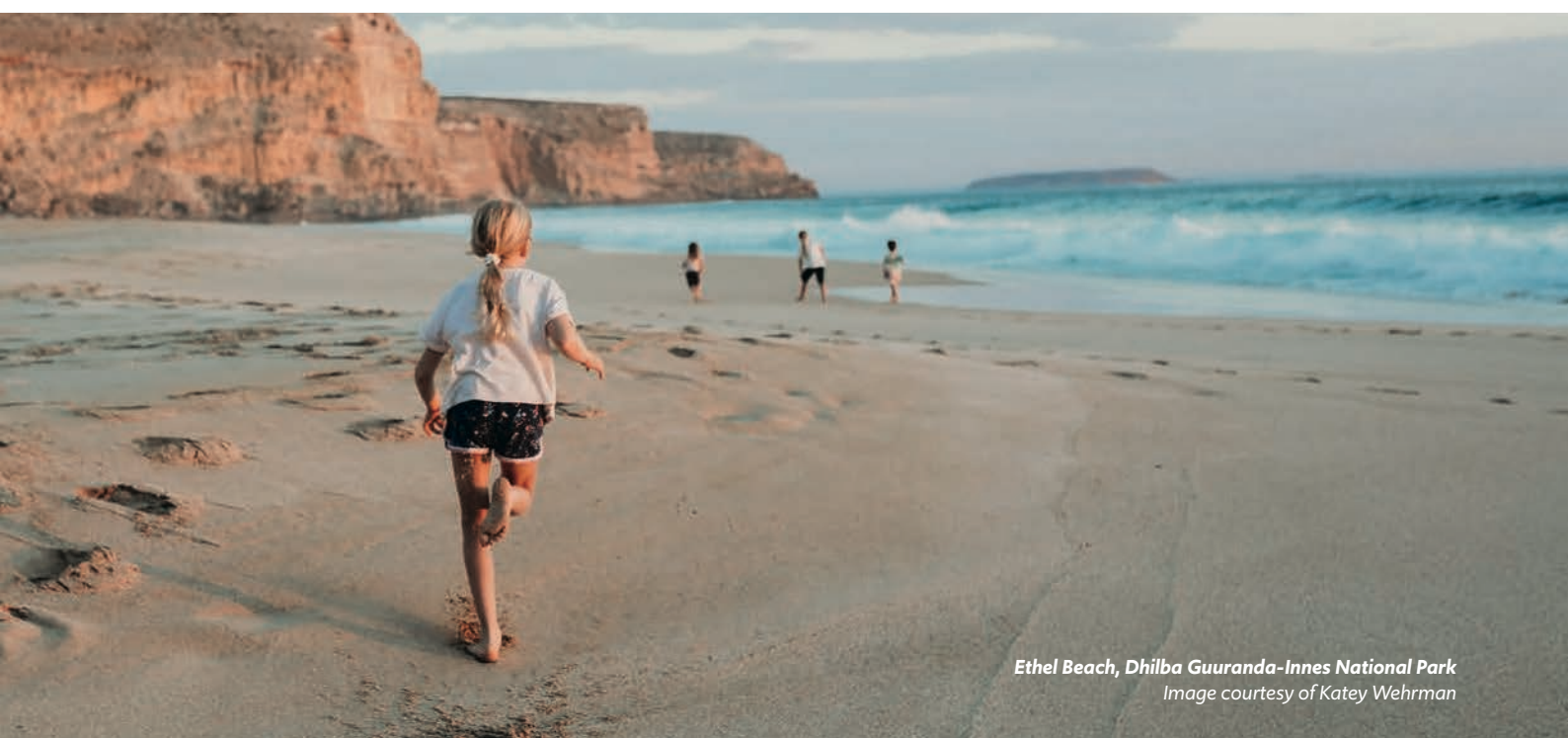
**d'Arenberg Cube, McLaren Vale**  
Image courtesy of South Australian  
Tourism Commission/  
d'Arenberg Cube



**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

Please contact Invest SA



## Chris Wood Executive Director

Invest SA  
Department for Trade and Investment

T: +61 (8) 8235 5400  
E: [dti.investmentsupport@sa.gov.au](mailto:dti.investmentsupport@sa.gov.au)

Published November 2023.

No responsibility for any loss or damage caused by reliance on any of the information or advice provided by or on behalf of the state of South Australia, or for any loss or damage arising from acts or omissions made, is accepted by the state of South Australia, their officers, servants or agents. Produced by the Government of South Australia © November 2023. Content correct at time of printing.



[invest.sa.gov.au](https://invest.sa.gov.au)



Government  
of South Australia