

South Australia Partnering for growth



Acknowledgement of Country

The Department of State Development acknowledges and respects Aboriginal people as the state's first people and nations, and recognises Aboriginal people as traditional owners and occupants of South Australian land and waters.



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 Resources, fuels and cleantech, Defence and space, Health and medical, 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**



The South Australian Government has a strong plan to grow our state's economy and capitalise on its competitive strengths. As Minister, I am committed to working with our partners to realise its full potential, and Invest SA has been established to support that plan.

Invest SA's team of investment and business development professionals work hard to ensure South Australia is recognised as one of the best places in the world to invest by helping to drive inbound national and international investment.

South Australia's economic diversity contributes to state growth and Invest SA plays a critical role in connecting business professionals to opportunities, industry networks, and other government agencies in South Australia – all of this with a view of achieving investment attraction.

So, if you're interested in doing business in Australia, Invest SA stands ready to show you why South Australia is the best place to start.

Joe Szakacs MP **Minister for Trade and Investment**

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Key investment sectors in South Australia

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

- Resources, fuels and cleantech
- Defence and space
- Health and medical
- Critical and emerging technologies
- Creative industries
- Food, wine and agribusiness
- Green economy
- Tourism

Our strengths = your opportunity



Australia's renewable energy superpower

Global leader in integrating wind, solar and battery energy systems into the state's energy network with up to 74% of the state's energy produced through wind and solar in 2023.



World-class wind, solar and mineral resources

World-leading green credentials and global leader in wind and solar electricity production. Global leader in critical mineral exports with the world's largest zircon mine and significant resources including copper, graphite, magnetite and 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.



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 medical 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.



At scale agricultural production, premium food, wine and forestry products

Global reputation for producing clean, green, safe, and traceable food.



Cloud infrastructure

25 colocation data centres, 177 cloud service providers, 24 network fabrics and 50 service providers.



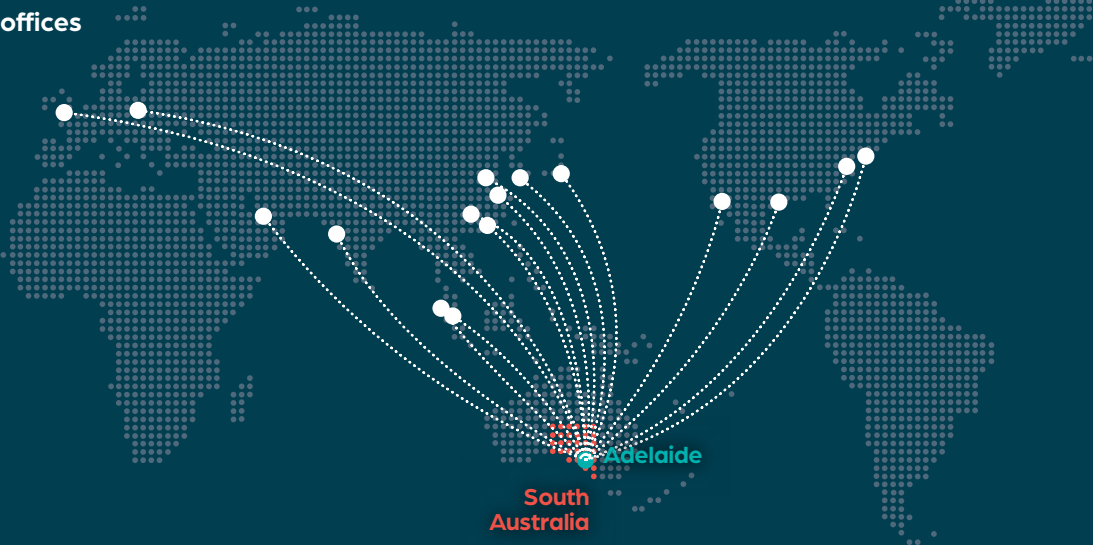
Exceptional connectivity

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

Introducing South Australia

Trusted global partner	Stable government with strong policy frameworks and green economy leadership.
Skilled workforce	<p>A suitably skilled and scalable workforce with the highest retention rate in mainland Australia based on 5+ years in current main job.</p> <p><i>Source: Australian Bureau of Statistics, February 2024</i></p>
Centrally located	<p>Centrally located and globally connected; shared borders with all mainland states with existing infrastructure corridors.</p> <p>UTC +9:30 hours time zone; favourable time zone to the Asia-Pacific region.</p>
Capability	<p>Consistently ranked Australia's number one jurisdiction in economic growth and the best location for doing business.</p> <p>Australia's renewable energy superpower with over 74% of South Australia's electricity generation from wind and solar in 2023.</p> <p>Industry contributing products and services into global and local supply chains for the build and sustainment of defence and space projects.</p> <p>Focus on Industry 4.0 technology development including Lot Fourteen, Tonsley Innovation District and Technology Park.</p> <p>Investment in highly-skilled workforce to deliver major projects.</p> <p>A strong geographical position to support polar and sun-synchronous launch services.</p>

● Invest SA overseas offices



Invest SA helps facilitate



Invest SA helps facilitate:

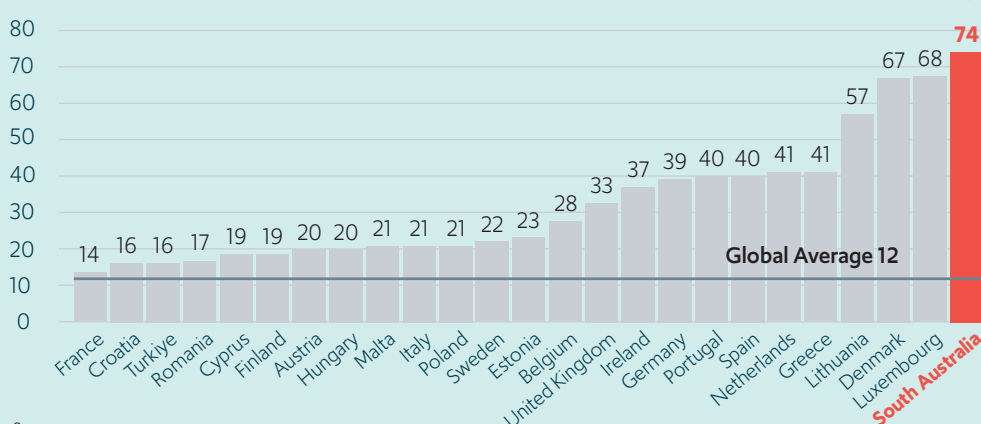
- Identifying a suitable location
- Connections across government
- Attracting and retaining highly-skilled staff
- Introductions to industry partners and networking opportunities
- Planning and cross-government delivery of investment projects
- Connections with our global teams and identifying export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

Resources, fuels and cleantech – South Australia has what the world wants. What the world demands.

Invest in Australia's renewable energy, hydrogen and minerals capital

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

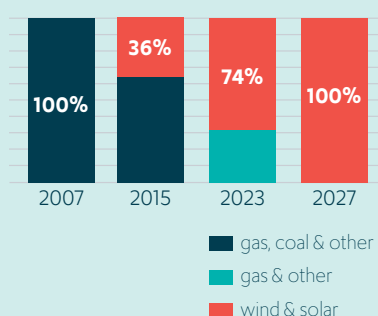
% share of wind and solar in electricity generation by market, 2023



Source: opennem.org.au



On track for 100% net renewables by 2027



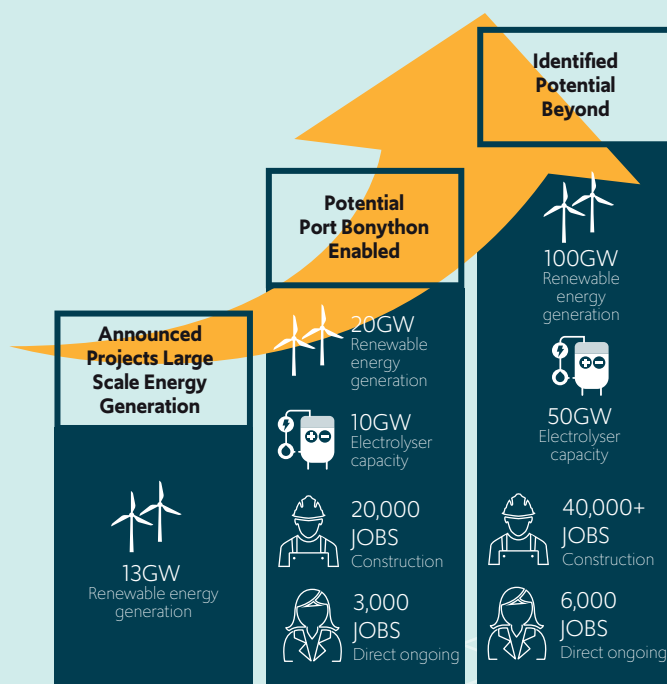
Hydrogen unlocks value

South Australia is an international leader in integrating wind, solar, and battery energy system into the state's energy network. In 2023, over 74% of South Australia's electricity generation came from wind (47%) and solar (27%).

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 100 gigawatts (GW) of wind and solar resources in South Australia with further development potential – that's more than 10 times the state's current registered electricity generation capacity. South Australia is on track to meet 100% of our electricity demand from renewable energy by 2027.

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 strategic and critical mineral exports with Australia's richest copper resource and the world's largest zircon mine, Jacinth-Ambrosia. Our state is also home to the world's second largest proven graphite reserve and promising cobalt resources, which are crucial for lithium-ion battery production, and has an expanding inventory of 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.

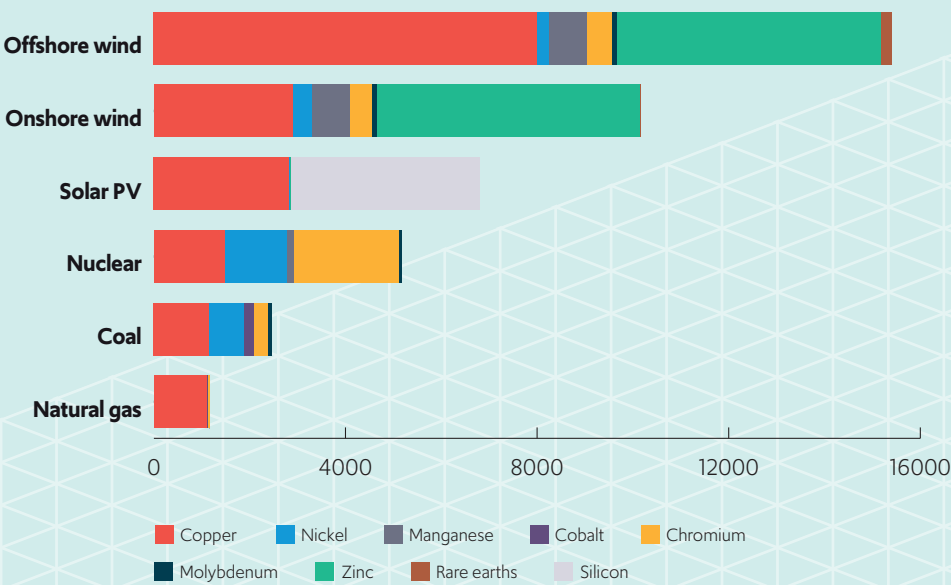
South Australia has huge potential to play an important role in industry supply chains with superior quality magnetite to assist the global steel industry to decarbonise, and high-purity alumina for a range of technologies, and the manganese and silicon resources as the main alloying elements used in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

The Government of South Australia supports the Australian Government's visions 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 South Australian Drill Core Reference Library, located in the Tonsley Innovation District, hosts geological samples recovered from over 130 years of exploration for minerals and energy resources otherwise hidden beneath the land surface of South Australia. These irreplaceable samples represent valuable direct records of the geological materials retrieved from the depths of the crust, that will continue to be investigated and analysed by new generations of geologists in industry, research, education and government.

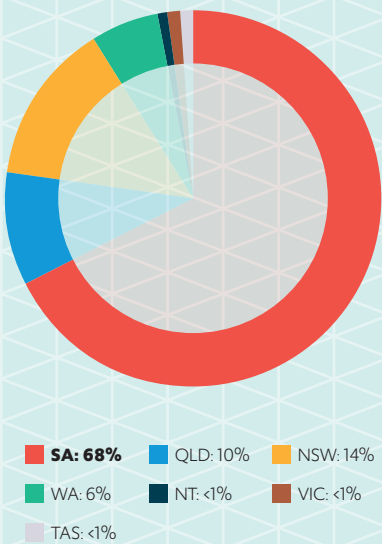
The Government of South Australia recognises the link between mining and renewable energy. This link is critical to the world's net-zero emissions future.

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



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

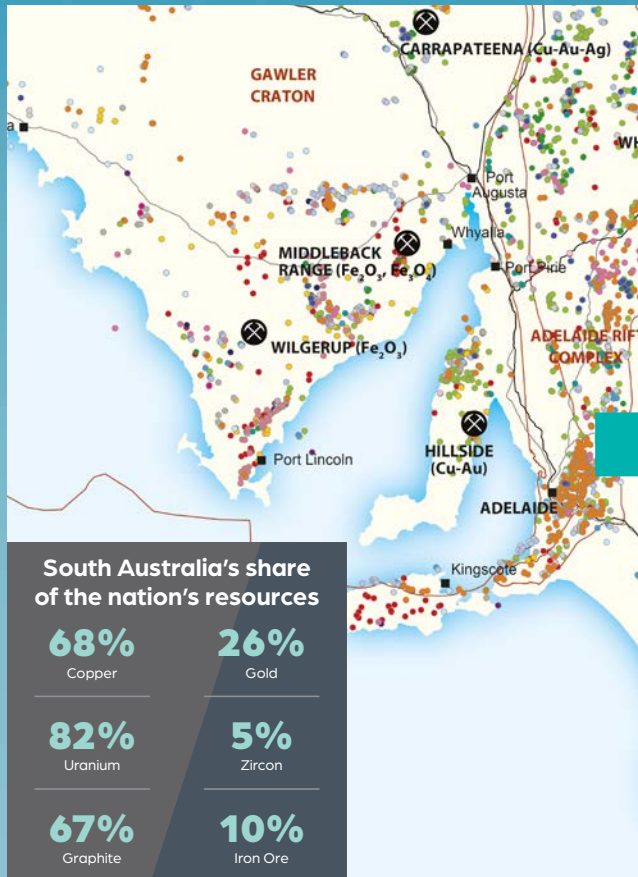
South Australia contains 68% of Australia's economic demonstrated resources of copper



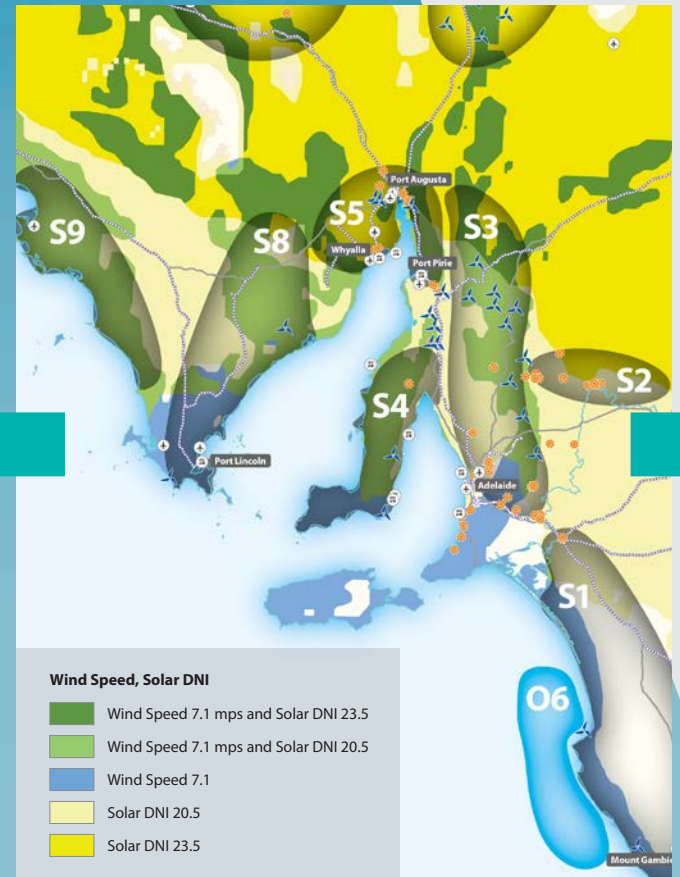
Source: Geoscience Australia

South Australia is set for a decarbonised future

Mineral resources



Renewable Energy Zones (REZ)

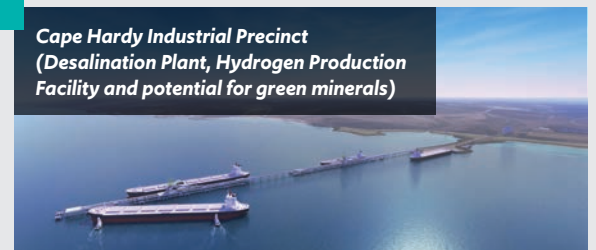


Port Augusta Renewable Energy Park

Infrastructure corridors



Energy hubs



Developing South Australia's net-zero carbon future

1. On track to reach **100% renewable** generation by 2027.
2. Rising force for **green minerals** (copper, magnetite, graphite, cobalt, zircon and rare earth elements).
3. Renewable **hydrogen superpower** by supporting hydrogen projects across the state.
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.

Seven of the world's top 10 defence primes call South Australia home.

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 combining industry leaders, government entities and education partners in critical technology precincts and collaboration hubs.

Home to defence programs including:

- Collins class submarines
- Hunter class frigates
- P-8A Poseidon maritime patrol aircraft
- Hobart class air warfare destroyers
- Jindalee Operational Radar Network (JORN)
- Triton unmanned aircraft system
- Arafura class offshore patrol vessels.

AUKUS partnership

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

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 coordinate 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 (and defence) sector 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 capability and hosts international businesses, notable private investors, 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

South Australia is characterised by deep clinical research, manufacturing and an end-to-end clinical trial value chain supported by world-class infrastructure and digital capabilities.

It is an exceptionally collaborative and connected ecosystem for drug development, advanced manufacturing and health innovation.

This makes Adelaide and South Australia the perfect location to collaborate, innovate and trial new products, ready for global commercialisation.

Data-driven precision health innovation

Adelaide is home to world-leading artificial intelligence and data analytics capabilities, supported by unique clinical infrastructure, longitudinal datasets and biospecimen for precision clinical research and drug development.

The Australian Institute for Machine Learning (AIML) is one of Australia's largest AI capabilities. It conducts globally renowned research in machine learning, artificial intelligence, computer vision and deep learning. AIML works with leading global companies including Roche, GSK and Medtronic to push the frontier of precision health.

Connected innovation precincts

Adelaide's flagship precincts combine world-class researchers, companies, government, academia, infrastructure, investment, teaching and clinical care, creating unique opportunities for innovation that underpin the state's leadership and strengths. These include Adelaide BioMed City, Tonsley and Lot Fourteen Innovation Districts, ensuring health and medical research, manufacturing and clinical care are embedded with technological innovation.

This makes Adelaide and South Australia the perfect location to collaborate, innovate and trial new products, ready for global commercialisation.



End-to-end clinical trial capabilities

Australia's unique regulatory framework means rapid start-up time without compromises. South Australia's complete ecosystem is your most strategic entry point for exploring the whole Australian clinical trials sector, clustering end-to-end advice and expertise which provides the most efficient pathway to your clinical trial conduct.

The state's major hospitals each have world-class infrastructure with clinical trial units allowing access to dedicated investigators leading clinical research. South Australia is an ideal location for both healthy individuals and patients, including specialised patient populations.

Fast and trusted for global markets (including FDA, EMA, TGA), working in South Australia will help you start your clinical trials in as little as six weeks.

Drug development and biotech

South Australia is a centre for drug research and new biotech companies. Key opinion leaders focus on drug development across a wide range of specialisations including immunology, infectious diseases, neuroscience and endocrinology.

Oncology is a focus, including precision health, CAR T-cell technology, computational systems, epigenetics, single cell and spatial technologies, gene regulation, molecular signaling, translational oncology and cancer genomics.



Manufacturing capability

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

Our contract development manufacturing organisations (CDMOs) support process development through to current Good Manufacturing Practice (cGMP) for both clinical and commercial scale for global market regulators, with capability across small and large molecules. Adelaide is home to global operations for pharma and nutraceutical therapeutics, generics and supplement manufacturers.

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 leadership 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 to be efficient, 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.

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 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 the largest machine learning group in Australia and the country's first institute dedicated to research in machine learning.

AIML conducts globally competitive research and development in machine learning, artificial intelligence, computer vision and deep learning, across industries including healthcare, defence and space and agriculture.

AIML is part of The University of Adelaide and provides AI capability for global brands including Amazon Web Services, GSK and BHP Group Limited.

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.

Massachusetts Institute of Technology – Connection Science: 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.

Australian Research Centre for 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 more papers than any other 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

avanade

"Adelaide is an exciting city with a booming technology industry. Our Adelaide Engineering Hub will play a key role in shaping the city's innovation ecosystem, support our clients through a period of accelerated digital transformation, and enable government and businesses alike to rapidly transform their operations."

Laura Malcolm,
General Manager, Avanade Australia

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

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

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

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 Connection Science the technology of innovation

"South Australia is quickly becoming a leader in the world's emerging digital economy, with its research leadership in data and AI, bringing partners from around the world to develop solutions relevant not only for Australia but also for the entire IndoPacific region."

Professor Alex 'Sandy' Pentland,
Massachusetts Institute of Technology

NEXTDC where the cloud lives®

"We're excited to invest in South Australia's future as a digital hub for innovation and sustainability. The State Government's commitment to a digital-driven, green economy supporting cutting-edge technology aligns with our vision to build Australia's leading digital infrastructure platform here in Adelaide."

David Dzienciol,
Chief Customer and Commercial Officer, NEXTDC

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

South Australia is well equipped to address world food challenges. With a thriving food, wine, and agribusiness sector, built from a time-honoured farming and manufacturing history, South Australia boasts an at-scale, high quality, safe and efficient agricultural production system. The sector integrates world-leading research and development with innovative technology, using advanced manufacturing, artificial intelligence and robotics to increase sustainable food production and meet consumer demand. The state has a strong focus on climate change adaption, food waste reduction, supply chain resilience, and the demand for low-carbon practices throughout the wider food industry.

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

Home to around 4,500 grain farms growing crops such as wheat, barley, lentils, and canola - contributing around 20 per cent of national grain production. Our grain industry is highly regarded for its innovation with farmer-led developments in machinery and land management, with a renewed focus on grains research and sustainable production practices.



Horticulture

Our producers have a long history of leadership in water-efficient technologies and management to ensure sustainable use of our water resources, particularly the Murray River, underground aquifers, and recycled water. Industry advancement from traditional grower base to a higher degree of value-add through innovative production and processing. We are leading technological advances in large scale protected cropping in Australia.



Meat, livestock and dairy

Our pastoral and mixed farming areas are home to a thriving meat and livestock industry recognised globally for premium quality and sustainable production practices. Local industry diversity with beef, sheep, pigs, chickens, kangaroos, goats and bees complements traditional dairy processing and a vibrant artisan cheese industry.



Seafood and aquaculture

Home to some of the world's most sought-after, premium quality, and sustainably produced seafood with a thriving land-based aquaculture industry, supported by first-rate fisheries and aquaculture management. Asparagopsis is a native seaweed that has been prioritised for rapid research development and cultivation scale up due to its methane-reducing properties in livestock, with Adelaide named as a pivotal scientific research hub within the National Hatchery Network.



Wine

Renowned as the wine capital of Australia. Home to some of the world's oldest vines, boasting a clean environment, diverse landscapes, rich soils and unique regional micro-climates. Future-proofing the industry through early technology adoption, embracing modern winemaking techniques and a commitment to environmental sustainability. Innovation is supported via Australia's leading viticultural and immunological education, research and development institutions being in Adelaide.



Forestry

A national leader in environmentally sustainable plantation forest management, boasting 168,000 hectares of softwood and hardwood plantations. The state's plantation forest contributes heavily toward meeting climate change targets with plantations absorbing carbon dioxide (CO₂) from the atmosphere - offsetting estimated emissions of over 20,000 trucks annually.

Globally recognised production of high-quality raw ingredients at scale

Access to diverse range of readily available quality raw materials at scale from primary producers in a variety of sub-climates as well as controlled environments. South Australia is the ideal place to take advantage of emerging global market opportunities across a wide array of new and innovative products, such as sustainable alternative proteins from natural land and marine-based resources.

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 and global trade partners.

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 aid companies in meeting their ESG targets.

Vigorous 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.

World-class high-tech capabilities (artificial intelligence, machine learning, augmented reality, virtual reality), and a well-established network of early agrifood technology adopters.

Robust biosecurity frameworks and traceability systems

Our integrated transport and storage network across road, rail and sea gives local producers and manufacturers a quick path from farm gate to international markets via deep sea container and bulk loading ports. Our network pathways to market are flexible and able to quickly adapt to market changes.

Cutting edge innovation, research and development

The Waite Research Precinct, which includes the newly formed Adelaide University, and the South Australian Research and Development Institute, is the largest concentration of expertise in the southern hemisphere, specialising in biotechnology, sustainable agriculture, wine, horticulture, and land management. Collaboration between government, universities, and private enterprise is fostering creative and practical solutions for the agriculture industry through innovation and commercialisation.

South Australian advantage

South Australia offers many advantages for agri-centric businesses looking for a new market to expand their global footprint or explore complementary capabilities for potential partnerships. With a supportive and collaborative ecosystem underpinned by strategic government and industry-led initiatives, opportunities are available for companies of all sizes, from startups to multinationals to support their strategic growth ambitions.

Green economy global leader

South Australia is leading the Indo-Pacific region to decarbonise and transition to net-zero.

The state’s green economy ecosystem includes abundant renewable energy resources, world-leading innovation and strengths in resource recovery and circular practices.

South Australia’s circular economy leadership

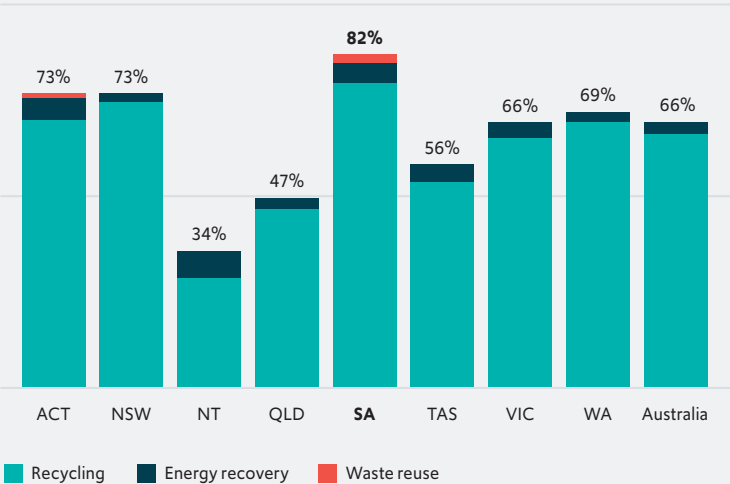
South Australia is an internationally recognised leader in the circular economy – with over 80% of all waste generated in South Australia diverted from landfill.

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.¹

South Australia has successfully demonstrated how good public policy has resulted in circular economy leadership. This includes:

- becoming the second jurisdiction in the world and first in Australia to implement a container deposit scheme. Starting in 1977, 35 years before any other Australian state
- initiating Australia’s first plastic shopping bag ban in 2009
- banning single-use plastic items such as plastic straws, cutlery and plates in 2020.

Resource recovery and recycling rates by jurisdiction, 2022-23



Source: National waste and resource recovery report 2024

South Australia has set a target to reduce greenhouse gas emissions at least 60% below 2025 levels by 2030, and to achieve net zero emissions by 2050.

In 2021-22, a 57% decrease in total net emissions from 2004-5 levels was recorded.

92% of materials diverted from landfill in South Australia are recycled within the state.

¹ Source: Green Industries South Australia

Investment priorities and opportunities



Bioenergy production

- Leveraging South Australia's significant and diverse agricultural feedstocks, and landfill diversion for utilisation projects including biofuels, organic SAF, biogas (biomethane, syngas), biochar etc.



Innovative climate tech

- Green manufacturing capability including production of sustainable packaging, recycled building materials, biodegradable products etc.



Resource recovery and recycling infrastructure

- Attracting investments that continue to improve waste separation
- New recycling infrastructure for materials not currently recovered
- Biogenic carbon dioxide recovery and utilisation for circular economy outcomes
- Value-add manufacturing from waste commodities (e.g. batteries, tyres, solar panels, construction waste, wind turbines, glass, plastic etc).



Leverage our world-class machine learning and AI capabilities to

- Improve to carbon accounting frameworks, ESG and traceability systems.

Orora Gawler Site
Image courtesy of Orora

Case Study – Orora

Sustainable manufacturing leader Orora opened an AUD\$25 million glass beneficiation plant at its Gawler manufacturing site in 2022. Orora acquires over 80 per cent of the glass returned to the South Australian Container Deposit Scheme (CDS) and the plant has capacity to process up to 150,000 tonnes of material per year, which is equivalent to approximately 330 million wine bottles or 750 million beer bottles. The facility enables Orora to increase the amount of recycled content in glass packaging manufactured, reducing the amount of energy consumed, carbon dioxide emissions released and virgin materials deployed to manufacture glass, whilst diverting waste away from landfill. Orora continues to demonstrate its sustainability commitment with significant investments including an oxygen-fuelled furnace commissioned in December 2024, to help Orora deliver a step change in greenhouse gas reduction.

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, 11 new international standard hotels providing a combined total of over 1,700 additional rooms have opened in Adelaide, with growing investment from international hotel brands. Ever-growing demand from leisure and business travellers ensures that high occupancy rates are maintained.

In April 2024, Adelaide had the highest hotel occupancy across 14 major cities throughout Australia and New Zealand.²

² Source: STR.

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.

Riverbank, Adelaide
Image courtesy of Michael Waterhouse



LIV Golf Adelaide
Image courtesy of Jon Ferrey/LIV Golf



Driving growth in SA's tourism economy towards 2030 by attracting investment in world-class tourism assets:

- new venues and experiences linked to tourism, recreation and wellbeing
- strategically expanding and upgrading the offerings of quality Adelaide accommodation across all traveller segments to meet demand
- attracting investment in high quality and significant scale accommodation in key regional destinations to stimulate international demand.

- AUD\$10.1 billion expenditure.³
- 39.8 million visitor nights.³
- The state's world-class year-round festival, sporting and leisure events calendar and conference seasons are driving the highest ever room nights with occupancy rates reaching record levels of over 90%.⁴

³ Source: Tourism Research Australia, Year ending December 2023.

⁴ Source: STR.

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

Monarto Safari Park

Monarto Safari Park is the largest open-range safari experience outside of Africa. Located just over an hour from Adelaide, the park attracted nearly 200,000 visitors last year following an AUD\$16.8 million upgrade to build a new visitor centre. A further AUD\$60 million expansion of Monarto Safari Park is in progress as a joint initiative between Zoos SA and investor, Gerry Ryan OAM. Opening in 2025, the expansion will feature a 78-room luxury safari resort and provide visitors their first opportunity to stay in deluxe accommodation at the park. The development will include conference facilities, function and restaurant spaces, as well as luxury eco-glamping facilities with lodge. 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, this 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 – as well as on-site accommodation through the 100-room Rydges Pit Lane Hotel and the BIG4 The Bend Holiday Park. The international, award-winning motorsport facility hosts an array of events each year including the Supercars Championship endurance event and the Asia Talent Cup – part of the International MotoFest.

The Cliffs Kangaroo Island, Penneshaw Pub & Seafront assets

In 2026, The Cliffs Kangaroo Island will deliver one of the world's bucket-list golfing destinations. As part of their investment across the state, Pelligra is investing heavily in tourism, particularly on Kangaroo Island. This development will include a world-class championship golf course, clubhouse, restaurants, pro shop 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. Encircled by jaw-dropping coastline, mesmerising natural wonders and abundant wildlife, this investment complements the nature-based tourism experiences on Kangaroo Island, where visitors can walk amongst the sea lion colony on Seal Bay; wander through the gigantic boulders at Remarkable Rocks which have been shaped by the erosive forces of wind, sea spray and rain over 500 million years; and explore Flinders Chase National Park, known for its dense bushland, soaring cliffs, untouched white sandy beaches and abundance of native wildlife.

Thriving regions

Regional tourism investment is booming with the Monarto Safari Park and Monarto Safari Resort (opening 2025), The Bridgeport Hotel – Murray Bridge and the Shell V-Power Motorsport Park featuring the Rydges Pit Lane Hotel and BIG4 Holiday Park.

Opportunities to invest in South Australia's premium wine regions are also available, including in the Barossa Valley, McLaren Vale and Clare Valley.

**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 Australians have made it clear that they want their state to be destination number one for business, and other jurisdictions need to take note if they want to remain competitive in attracting business investment"

Bran Black, Chief Executive, Business Council of Australia

Better, cheaper and less complicated

	SA vs VIC	SA vs NSW	SA vs QLD
Payroll tax threshold and rate ⁷	Better	Better	Less complicated
Prime office net face rent (\$/sqm p.a) ⁸	Lower	Lower	Lower
Prime industrial net face rent (\$/sqm) ⁹	Lower	Lower	Lower
Industrial construction cost ranges (\$/sqm) ¹⁰	Lower	Lower	Lower
Cost of living ¹¹	Better	Better	Better
Staff retention ¹²	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 8.1% below the national average, 8.2% lower than New South Wales, 6.6% lower than Victoria and 5.9% lower than Queensland.¹³

Sources:

⁷ Payroll Tax Australia

⁸ Office rent costs: CBRE Australian Office Space Costs – Q1 2025

⁹ Industrial rent and land costs. Knight Frank Industrial Review - Q1 2025

¹⁰ Industrial building costs: Napier & Blakely - Up to 10m high warehouse - medium standard over 3,000 sqm - July 2024

¹¹ Mercer: Cost of Living City Ranking 2024

¹² ABS - Job Mobility - Table 1.2 - Labour mobility, retrenchments and duration of employment by state and territory

¹³ Australian Bureau of Statistics, Average Weekly Earnings, Australia February 2024

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 61km from central business district

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.

Edinburgh Defence Precinct 34km from central business district

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

Edinburgh Parks Precinct 34km 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.

Osborne Naval Precinct 26km from central business district

Australia's premier naval industry hub and one of the world's most technologically advanced naval shipyards, which includes new capability to build the SSN-AUKUS nuclear submarines.

Technology Park 17km 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 health and 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 central business district

With three main campuses in South Australia, and over 150 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 central business district

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

University of South Australia Adelaide central business district

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

Waite Research Precinct 7km from central business district



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.

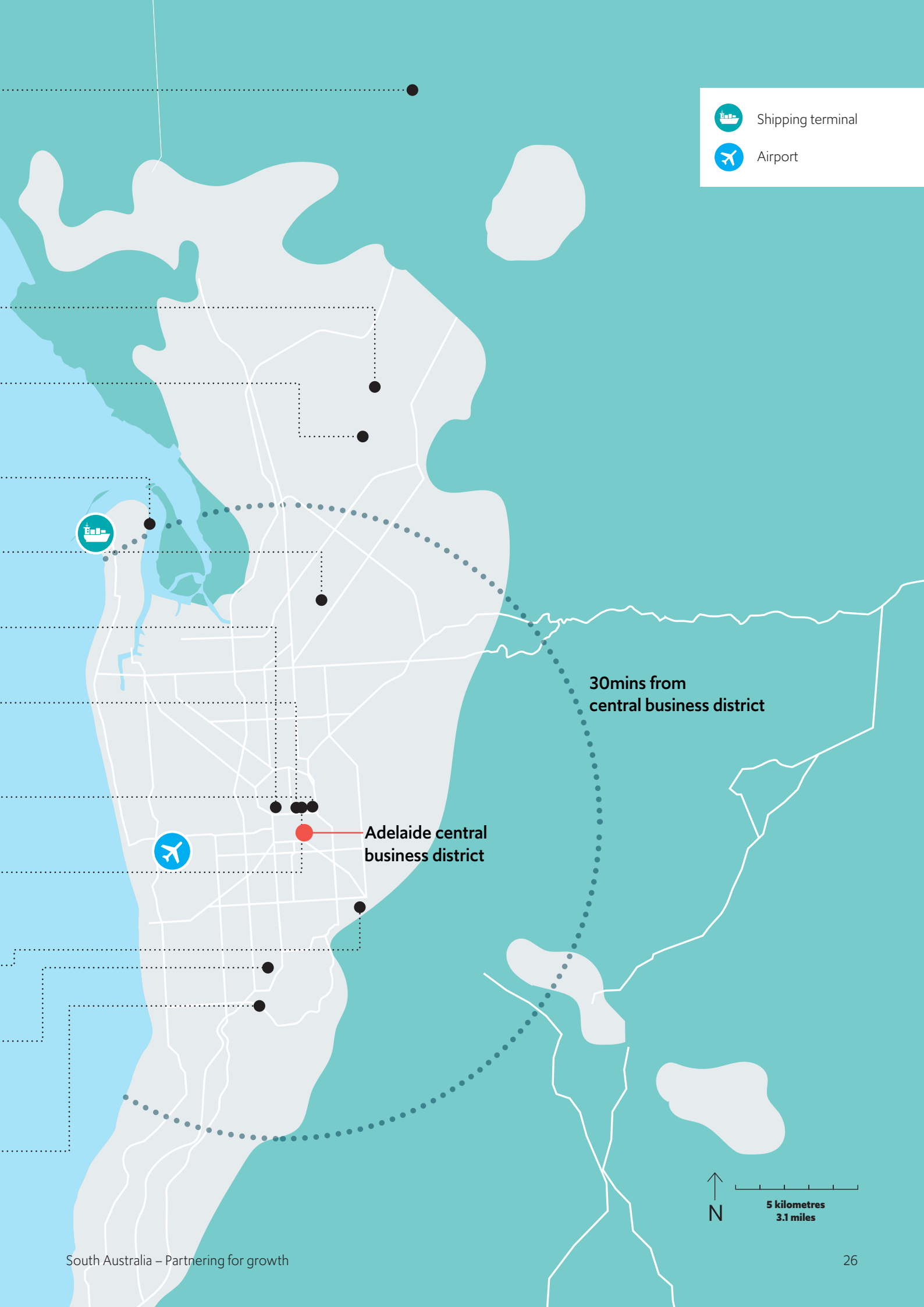
Tonsley Innovation District 12km from central business district

Home to high-value manufacturing industries including defence, health, medical devices and assistive technologies, clean tech and renewable energy, software and simulation, minerals and energy services. Home to Flinders 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 13km from central business district

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
central business district

Adelaide central
business district

N
5 kilometres
3.1 miles

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.

- **Ranked Australia's number one jurisdiction for economic growth (2024).¹⁴**
- **One of the lowest cost of living capital cities in Australia.¹⁵**
- **Adelaide's median house price is 40% lower than Sydney.¹⁶**

¹⁴ Commsec State of the States report, January 2025

¹⁵ Mercer: Cost of Living City Ranking 2024 – Sydney 58, Melbourne 73, Brisbane 89, Perth 109, Adelaide 107

¹⁶ Australian Bureau of Statistics, December 2024



Riverbank Precinct, Adelaide
Image courtesy of Olivia Dowling



East End Unleashed, Adelaide central business district
Image courtesy of Joseph Nes

The South Australian lifestyle

Adelaide has been named *The Most Beautiful City in the World* in 2024 (Architectural Digest).

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 – warm, dry summers and mild 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.

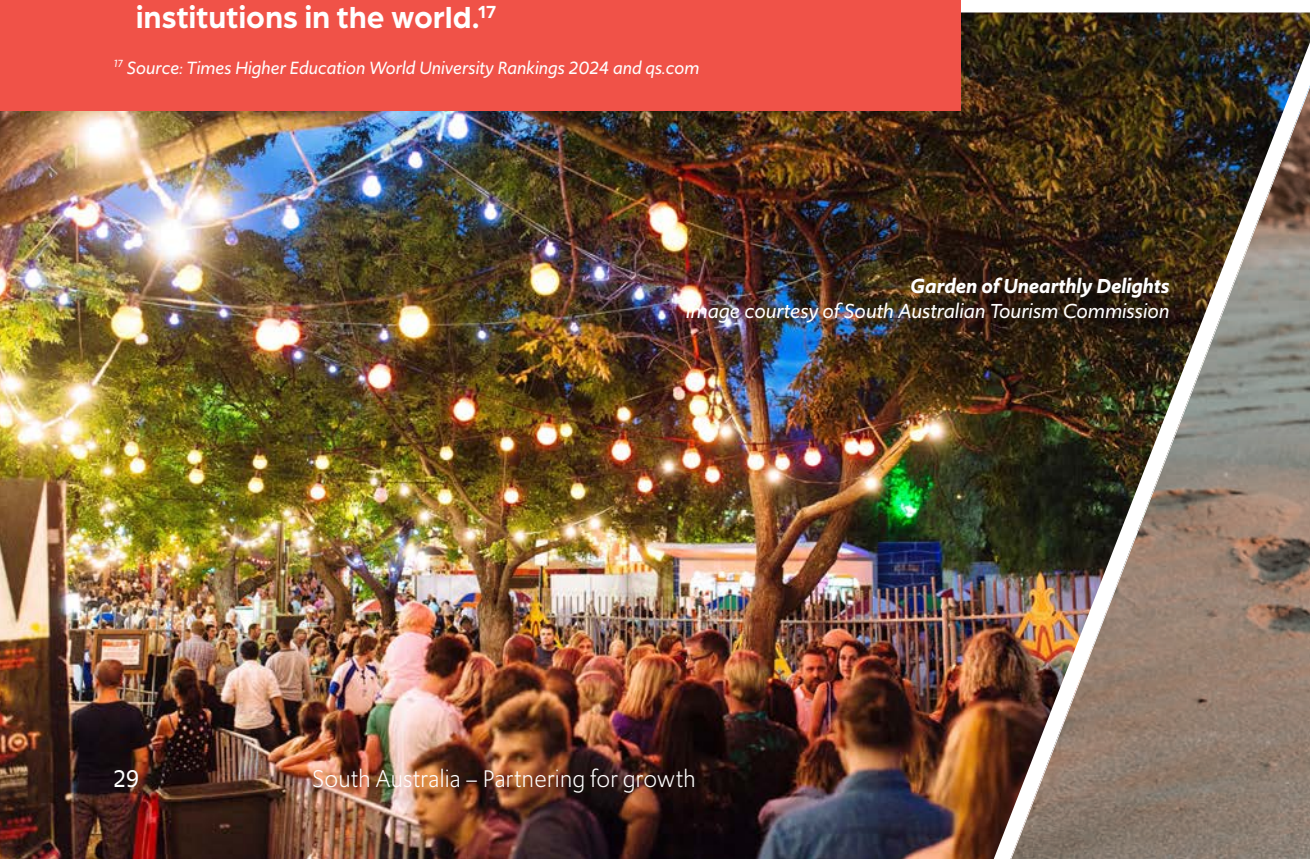
It's hard not to escape into nature with parks and walking trails everywhere.

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!

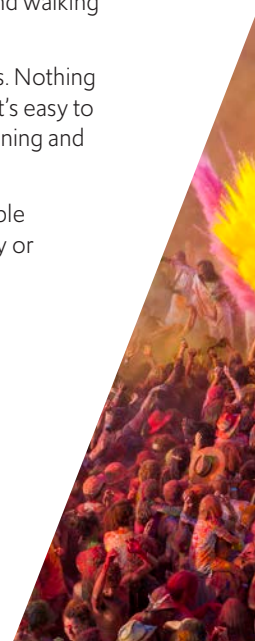
South Australia delivers a better, more affordable lifestyle and opportunities – whether in the city or suburbs, on the coast or in the hills.

- **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.¹⁷**

¹⁷ Source: Times Higher Education World University Rankings 2024 and qs.com



Garden of Unearthly Delights
Image courtesy of South Australian Tourism Commission





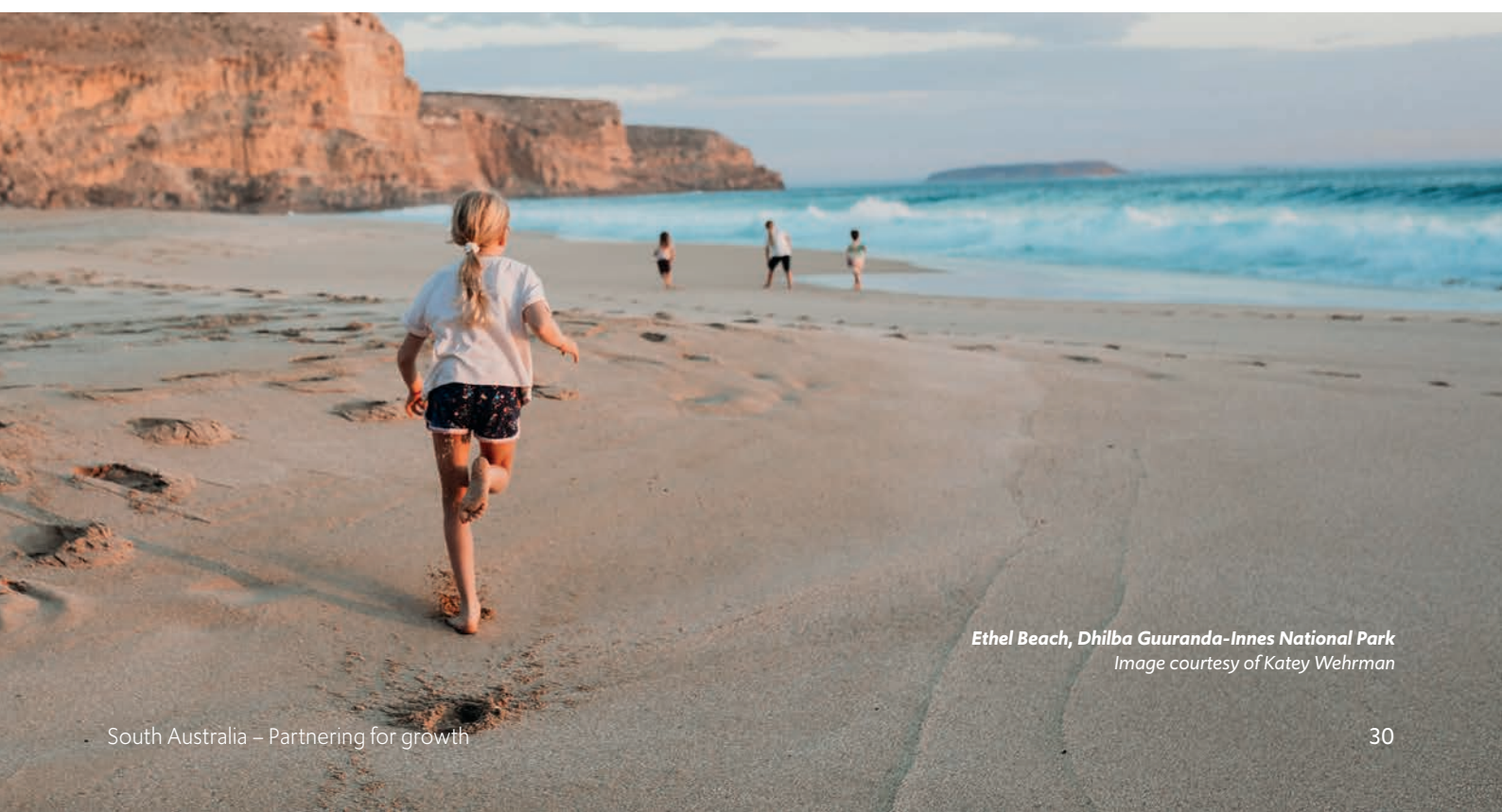
d'Arenberg Cube, McLaren Vale
Image courtesy of South Australian
Tourism Commission/
d'Arenberg Cube



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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