



Investment Opportunities 2019

The Greater Barossa Region:
Barossa, Gawler, Light and Adelaide Plains

The Barossa and wider Region stretches from the shores of Gulf St Vincent 80 km east to include the watershed of the Mount Lofty Ranges. From south to north, the region extends from the boundaries of Northern Adelaide, through the central Mount Lofty Ranges, a distance of 65 km, encircling the best broad acre cropping and wine growing country in South Australia.

A coast line with low-lying saltbush and samphire marsh lands is a part of a globally significant, high ecological and biodiversity value, **Adelaide International Bird Sanctuary**, and forms the western boundary of the region.

Traditional grain growing and food producing regions can be found in the north of the region. The production of premium quality grains and pulses over last 100 years continues to this day, supported by innovation and value adding.

The Barossa is Australia's foremost premium wine and food production region. Well known for producing some of the world's best wines, the wider region, incorporating

Light, Gawler and Adelaide Plains, also produces quality grains, pulses and vegetables. Its **Mediterranean-like climate** and its beautiful, historic amenities attract tourists from around the world.

The 'Barossa Brand' is highly sought after due to its high profile. Businesses operating from the Barossa gain an immediate advantage. Consumers associate the Barossa with high quality, safe, premium products.

The region is close to local, national and international markets. The **Northern Expressway** links the region with the **Adelaide Airport, Edinburgh Airforce base and Port Adelaide**, and provides quick road freight access to the Eastern and Western States.

The Regional Team *Barossa, Light, Gawler and Adelaide Plains – Working Together!*

Regional Development Australia Barossa Gawler Light Adelaide Plains (RDA BGLAP) is a collaboration between the Australian, South Australian and local government and industry to develop and strengthen the regional economy and attract investments.

Anne Moroney, CEO
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The Barossa Region

The Barossa Region covers 4 local government areas (LGA): *Barossa, Gawler, Light and Adelaide Plains*

Barossa - Australia's most famous wine region and tourist destination.

Land area **89,354** ha. Population **24,808**

Light - Viticultural and agricultural region with a rich mining heritage and premier broad acre farming. Land area **127,684** ha. Population **15,016**

Gawler – Population, Retail and Service Centre. Land area **4,109** ha. Population **23,583**

Adelaide Plains - Significant part of South Australian food bowl – horticulture, broad acre and grazing farming area with a tidal coast popular for recreational fishing. Land area 93,470 ha. Population **9,059**

Population is growing in this region is twice as fast as the state average

Competitive Advantages

Strategic location

- 60 km to Adelaide, Port Adelaide and Adelaide international airport
- Direct highways to Sydney, Melbourne, Perth
- 8 local airstrips for private and limited commercial aviation
- Barossa helicopter services
- Unique climate for premium wine and food

Economics

- \$ 3.42 billion in Gross Regional Product
- \$ 753 million GRP from wine industry
- Population growth - by 100,000 to 2040

Population

- Total Population 72,466
- Gawler 23,583
 - Adelaide Plains 9,059
 - Barossa 24,808
 - Light 15,016
- Labour force 36,973

Key Industries

- Wine (viticulture, winemaking, supply/services)
- Food (agriculture, agri technologies, horticulture, grains, artisan food production)
- Tourism
- Education

Emerging Industries

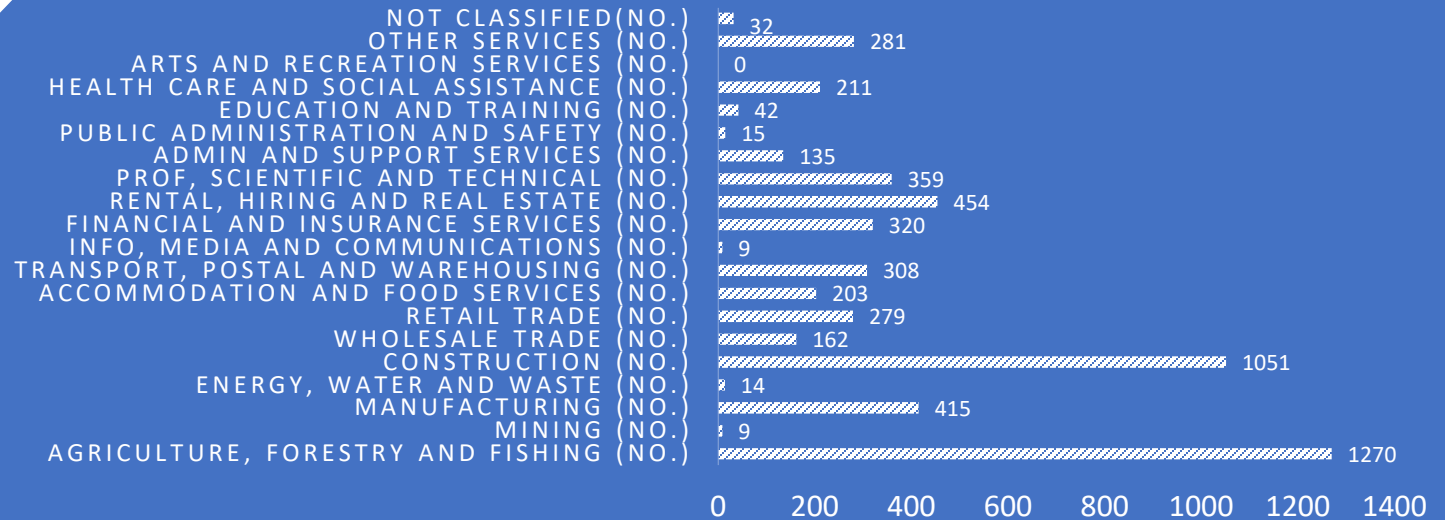
- Equine
- Weddings and events
- Professional services
- Health and wellness
- Creative industries
- Engineering Services
- Eco tourism

Capabilities

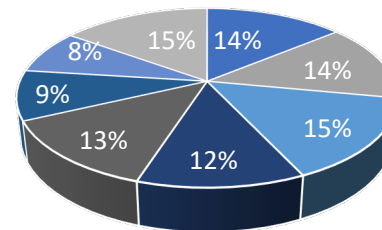
- Affordable land & housing
- Strong business networks
- RDA & government support
- Skilled workforce
- World famous regional Brand
- Large on-going investment in water, gas ,transport infrastructure
- Beautiful landscapes
- Education & Research

Regional Economics

Number of
Businesses
by Industry



- Managers (14 %)
- Professionals (14%)
- Technicians and trades workers (15%)
- Community and personal service workers (12%)
- Clerical and administrative workers (13%)
- Sales workers (9%)
- Machinery operators and drivers (8 %)
- Labourers (15 %)



Skilled
Workforce

TOP 6 Growth Sectors

The **Greater Barossa Region** experiences economic growth in a shared value model with a thriving agricultural sector underpinned by collaboration and boosted by investment, knowledge, services, downstream processing and tourism. Sectors with the highest growth potential are: **Premium Food and Wine; Tourism; Equine industry; Education and Professional services; Engineering services** including **wine, mining and defence**; **Services** associated with **Population growth**.

Premium Food & Wine

Grapes & Wine
Horticulture—light
vegetables, high tech
hydroponics; nuts
Grains and Pulses, Poultry
and Livestock

Tourism

Culinary and Wine
Eco, Cycle & Trails
Wellness Tourism
Business Tourism
Weddings,
Events & Festivals

Equine Industry

Equine health centre
Quality training
facilities and skilled
trainers. Breeding.
Suppliers & services
Training & education

Education and Professional Services

Business to Business
network as a driver
Professional business
consultants
6 high schools, TAFE, Uni
of Adelaide
R&D facilities SARDI
Barossa Campus,
Flinders Uni, UniSA

Engineering Services for wine, mining and defence

Skilled professionals
Technical precincts
Workforce with the
experience in auto
industry

Services for growing population

Retail
Entertainment
Health services
Aged Care
Education
Recreation

Infrastructure Drivers

- **Northern Connector** linking Northern Expressway and Port River Expressway
- **NBN and High Speed Wireless**
- **Residential growth** of Gawler South, Gawler East, Roseworthy, Two Wells, Nuriootpa and Concordia
- **\$1 b investment** in Edinburgh Airforce base
- Bunyip Water **Stormwater & Wastewater Harvesting Scheme** (Water for the economy)
- **NAIS Water Re-Use infrastructure** - Northern Adelaide Plains Bolivar extension north of Gawler River and potentially east to Barossa & Gawler
- Potential for **Airstrip**
- **Warren & South Para Reservoir** – fishing and kayaking
- **Barossa Campus**
- Electrification of **Gawler Rail Service**
- **Co-working Spaces**





Regional Industry Profile

- **Wine:** Global regional brand; global wine brands
- **Vineyards:** Premium A & B grade (**13,000** Hectares with an average of **80,000** tonnes crushed annually) New plantings and diversified varieties
- **Grain production:** Premiumisation
- **Grain processing:** Flour, animal feed, export
- **Pork:** Grain as input; processing and small goods
- **Lambs and Wool:** Premium Lamb, wool exported
- **Horticulture:** Fruits and light vegetables - high tech and low tech
- **Education & Research:** University, TAFE, R&D facilities, quality schools, VET education , executive education, international students, Barossa Campus
- **Tourism:** Culinary, recreation, wellbeing, business & events, sports, cultural
- **Manufacturing and Engineering:** Advanced services
- **Small Business:** Innovative, agile
- **Strong Population Growth:** double state average

Industry Profile - Wine

The Barossa as a world class region of fine wine endeavour based on a unique story of generations, inheritance and hallowed ground. The Barossa is home to some of the oldest *Shiraz*, *Grenache*, *Cabernet Sauvignon* and *Semillon* vineyards in the world, supplemented by new exploratory styles.

SA produces more than **75%** of Australia's premium wines. The Barossa on average accounts for **8%** of volume and **27%** of the total value of the South Australia grape and wine sector contributing on average **\$740** million annually.

The Barossa's **13,626** hectares of vineyards produce on average **80,000** tonnes of grapes with an estimated value of more than **\$114** million per annum. Up to **600,000** tonnes of wine grapes are processed annually in the Barossa. **2,700** people employed in the wine and grape sector in the Barossa accounting for **9.32%** of national wine sector employees.

Since **2001** exports of Barossa wine have grown from **402,000** cases to over one million cases equivalent annually and in dollar terms from **\$39** million to over **\$154.5** million (Mar, 2018). Wine export is growing in value more quickly than volume with highest growth in top 3 price categories.





Industry Profile - Food

South Australia is home to a renowned agriculture, food and wine industry. The Region takes pride in producing some of the best premium food and wine in the world – produced sustainably in a clean and safe environment. The Greater Barossa region has a rich and flavourful food culture that has a culinary heritage linked to German and English settlement in the **1840's**. More than **50** artisan food producers, more than 80 cafes and restaurants offering artisan food prepared with care and passion telling a story of time-honoured recipes passed down through six generations.

The total land area within the Region is **310,300** ha with agricultural land comprising of **268,323** ha.

South Australia's total agricultural gross value production is valued at **\$5,366,480,100** of which the Barossa Regions contribution is **7.2%**. Three major contributors to the Region's agricultural output are broadacre cropping, livestock and fruit production.

There is a diverse range of agriculture production within the Region. Number of farms: **110** pig, **130** chicken, **1104** sheep, **864** cattle, **172** alpaca, **19** deer, **101** oilseeds, **550** grapes, **78** fruit.

Industry Profile - Tourism

The Barossa is SA's food and wine tourism flagship well supported by trails for cycling, walking and riding. Colonial heritage and culinary traditions inspired by early settlers are alive and well, and modern reinventions have sparked interest in cultural food experiences including cooking schools, artisan products, farmers markets and restaurants.

Tourism listings in Barossa display **169** Attractions **22** Tour Operators **11** Hotels **11** Backpackers/hostels **7** holiday parks **88** B & B **65** Cabins/Cottages **98** Self Cont. properties. Tripadvisor provides **29,674** reviews and opinions on Barossa hotels, B&Bs and homesteads.

Average annual visitors and expenditure:

94% of the Barossa visitors are domestic and 6% visitors are international.

Domestic visits **312,000** Nights **515,000** International visits **13,000**

Nights **101,000** Average annual Day Trips to the Barossa **863,000**

Average Annual Expenditure **\$213,000,000**

The Barossa Region tourism offer:

- Food and Wine Tourism
- Heritage and Nature based tourism
- Equine tourism
- Adelaide International Birds Sanctuary
- Cycle Tourism
- Weddings
- Health and Wellness tourism
- MICE tourism (meetings, incentives, conferences, exhibitions)
- Epicurean Way Tourism Drive Route
- Education Tourism





Industry Profile - Equine

More than **350** clubs and associations are directly linked with horses in South Australia. There are approximately **90,000** horses in SA.

The Greater Barossa Region has a rich cultural and historical affinity with horses and a strong growing industry.

28 Equine facilities and clubs including:

- Gawler Race Course
- Mallala Equestrian Centre
- Kapunda Harness Racing Track
- Gawler Trotting Track

27 Equine industry suppliers

18 Equine veterinary services

28 Horse Breeding Studs

35 Horse trainers

Spending on horses in the Region is conservatively estimated at **\$37.7** million annually.

Racing is estimated to contribute an additional **\$10.6** million to the economy annually.

The Greater Barossa Region is home to a state-of-the art Equine Health and Performance Centre situated in the Roseworthy Campus of the University of Adelaide. High levels of expertise in equine medicine, surgery, sports medicine and reproduction. Equine education is an emerging opportunity.

Industry Profile – Weddings and Events

With an established and consumer led brand which has elements such as rich landscapes, heritage buildings, wine, artisan food and diverse hospitality venues, the Barossa Region is a perfect stage on which to leverage a vibrant weddings and functions industry. The Region presents opportunity for marriage ceremonies in surroundings that are extraordinary, offering a destination of choice and distinction.

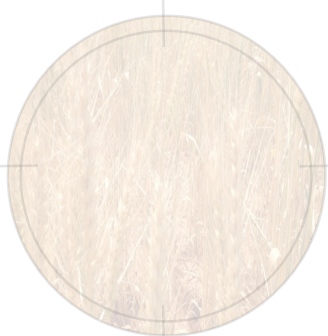
Quick facts:

Over **30** luxury venues that are highly suitable for wedding reception, **125** celebrants, **14** wedding photographers, **50** caterers, **57** conference venues, about **50** artists, musicians and artisans, **58** specialised service providers and suppliers, **68** beauticians, hairdressers and bridal fashion makers. Exquisite locations for photographs and ceremonies.

Trends:

- increasing interest in the Barossa region shown by Chinese Investors
- strong potential to expand the events market for international visitors
- linking of existing facilities and services providing an easy gateway for customers
- Weddings in exotic locations





Invest in Barossa

- Available and affordable land
- World-renowned 'BAROSSA BRAND'
- Skilled workforce
- Access to markets and ports
- World Heritage Bid Area
- Globally recognised region with capacity for growth into the future
- Grow, harvest and process food within the Barossa Region boundaries
- Reliable climate for quality cereal crops

Barossa Region Investment Map

Barossa Region Investment Map (the Map) is a snapshot of the Barossa Region. The Map highlights the region's economic, community and cultural assets to assist in deciding where investment is most strategic.

Barossa Region Investment Map is produced by Regional Development Australia Barossa Gawler Light Adelaide Plains. RDA's role is to increase economic diversity, economic growth and jobs. For potential investors, the Map is the first step towards exploring the Region and its investment potential.

The Map is a web-based GIS (geographic information system) application available to users all over the world. Information is presented in a series of layers (spatial maps) that can be viewed in any browser.

Barossa region Investment Map displays:

- Regional features
- Infrastructure
- Key industries and clusters
- Investment opportunities

Visit Barossa Region Investment Map at www.barossa.org.au





Invest in Premium Wine

Barossa is Australia's most famous wine region:

Home of established brands such as Penfolds, Jacobs Creek and Yalumba, the Barossa also hosts many emerging boutique wine brands. Barossa Shiraz is a super premium product and the Wine Industry overall is growing in value

Investment Opportunities:

- Energy infrastructure (solar and waste to energy)
- Water re-use infrastructure expansion
- Vineyards and Wineries – invest in value adding and tourism
- New markets development





Invest in Premium Food

Light Vegetables and Nuts:

High Tech Glasshouses
 Traditional vegetable growing
 Good climate and soils
 Clean environment and water availability
 Global almond industry
 Access to markets

Investment Opportunities:

- Energy infrastructure (solar and waste to energy)
- Water reuse infrastructure expansion
- Further investment in infrastructure and packaging and processing facilities
- New plantings
- New markets development including food waste re-use
- Logistics Hubs
- Airport
- Agri-tech investment in commercialisation and production





Invest in Premium Grains and Pulses

Grains and Pulses:

Premium Grain & Pulses

High value - high yield farms

Pelletisation and baling of animal feed

Australian Grain Technologies Research Centre at Roseworthy

Investment Opportunities:

- Specialty Milling facilities
- Maltster for Barley Malting for boutique beer
- Innovations in processing and manufacturing
- Processing and packaging of pulses (lentils, chick peas)
- New varieties





Invest in Poultry and Livestock

Poultry and Livestock:

Free range and caged poultry

Close to poultry processing and export facilities

Access to water and workforce

Pork with opportunities for value adding

Lamb for meat and wool

Dairy

Beef – small scale

Investment Opportunities:

- Pork farms including premium breeds
- Free range chickens and eggs
- Export ready processing and market development
- Wool processing for premium markets
- Cheese production for specialty cheese
- Barossa branded meat products





Invest in Culinary Tourism

Culinary Tourism:

The Barossa Region's rich heritage of German and British settlers has established a unique and authentic cuisine, in appealing landscapes supported by wine and cultural experiences.

Contemporary interpretations and a focus on fresh seasonal and local provide for exciting food discoveries.

Investment Opportunities:

- Tourism accommodation
- Restaurants and Cooking schools
- Hospitality education institutions
- Agri-tourism experiences
- Packaged offers





Invest in Health, Wellness and Recreation

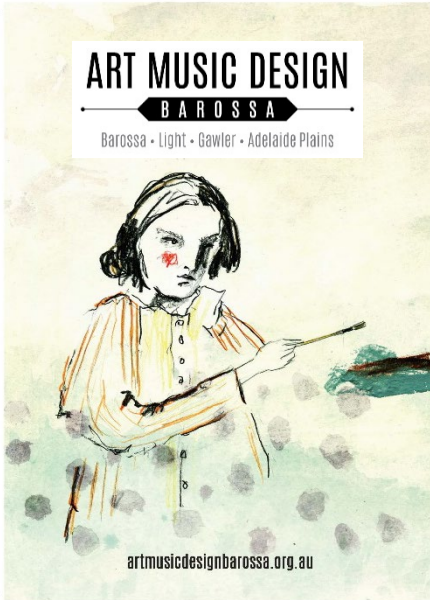
Wellness Tourism:

The Barossa region is a unique destination for those seeking recovery and relaxation or just prefer to maintain a healthy lifestyle while travelling. There is an enormous opportunity to add value to the tourism industry by creating luxury SPAs and resort style accommodation enriched with health and wellness services, eco-tourism and recreational facilities.

Investment Opportunities:

- Luxury SPA facilities
- Resort style accommodation
- Wellness retreat
- Detox facilities
- Recreation tourism
- Tourism Transport options
- Hospital





Investment Opportunities:

- Iconic Gallery/ Art Museum
- Artists Studios
- Live Music Events
- Recordings & video production studios
- Music Events

Invest in Cultural Facilities and Events

Art Music Design:

The Barossa Gawler Light Adelaide Plains areas have a rich cultural and art tradition. The Kurna, Ngadjuri and Peramangk people and immigrants from Europe have left a legacy of Arts and Artisans.

Features:

- Regional Galleries
- Artist Workshops
- Jam Factory Design Centre & Gallery Shop
- Writers Awards
- Photography
- Sculpture Park
- Public Art
- Mosaics
- Art Music Design Barossa
- Music Education
- Hill & Son Pipe Organ
- Flourishing artisan community





Invest in Equine Industry

Equine Industry:

The region has a proud history of equine industries, breeding race horses and performance horses with a racecourse, harness racing track and event arenas as well.

The Equine Health Centre at the University of Adelaide at Roseworthy provides expertise in health and high performance of horses, an ideal infrastructure base from which to expand investment in equine facilities and pursuits.

Investment Opportunities:

- International Equine Events arena (covered)
- Master Saddler
- Horses
- Breeding and Training facilities
- Equine Education & Training





Invest in Education and Professional services

Education:

The Greater Barossa Region has developed expertise in numerous areas: viticulture, wine, dry land agriculture, animal sciences (including equine), horticulture, culinary arts.

There is growing demand globally for services and service delivery. The region's strong amenity and global recognition provides ideal conditions for residential education, including executive education.

Assets: Barossa Campus, Roseworthy Campus of University of Adelaide, TAFE, several high schools and 3 co-working spaces.

Investment Opportunities:

- Further Co-working facilities for professional services
- Private educational & research Institutions
- Accommodation for students and retreats
- Bio-pharmaceuticals research
- Executive Education
- Culinary Training
- Technology hubs
- A University Resource Centre
- Sponsorship of Barossa Campus & Students





Invest in Aged Care and Population services

Aged Care and Population Services:

The Greater Gawler Area is planned to double in size from a current population of **22,000** to over **40,000** in the next **10** years

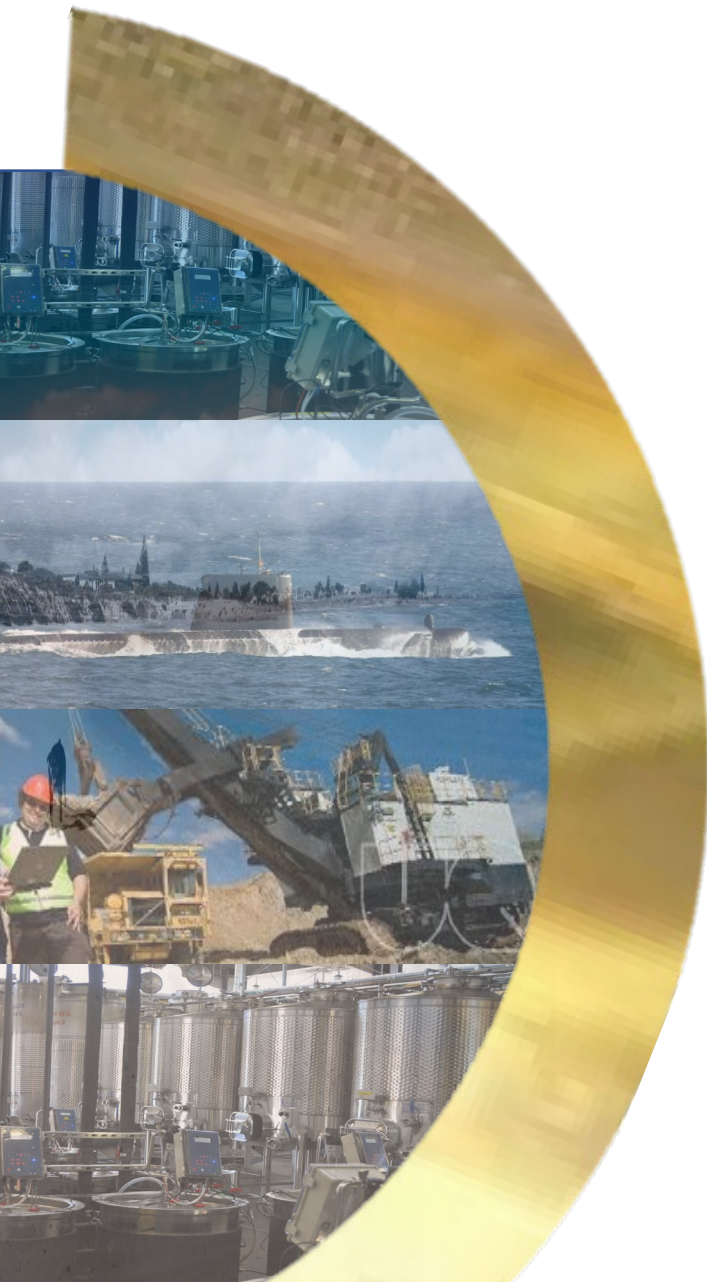
This growth provides opportunities for investment in facilities and services to support the growing population

Aged care services in high demand and this sector continues growing

Investment Opportunities:

- Entertainment facilities
- Recreation
- Health facilities
- Aged Care facilities and Services
- Professional Services
- Tourism accommodation
- Cycling infrastructure
- Tourism services to Barossa Valley





Invest in Manufacturing and Engineering Services

Engineering services in Wine, Mining, Defence:

- Excellent access to defence industries to the south, mining to the north and wine and food manufacturing within the region
- Cluster of advanced manufacturing businesses & scientific institutions that produce specialist parts and research for these industries
- Extensive wine and food industry processing and packaging facilities in the region

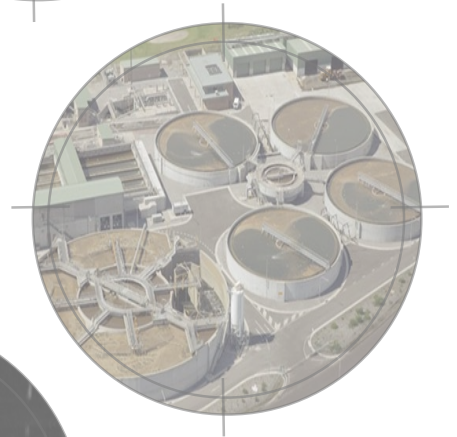
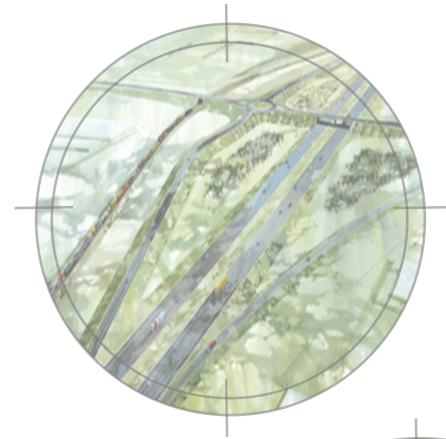
Investment Opportunities:

- Glasshouse and Solar panel production facilities
- High tech manufacturing
- Engineering Services Hub – serviced co-location
- Recreation Facilities for remote workers
- Educational Facilities

Invest in Infrastructure

Infrastructure

- Water Re-use Infrastructure – Northern Adelaide Plains extension of recycled water
- Renewable energy
- Natural Gas extension
- Accommodation infrastructure
- Tourism infrastructure
- Facilities for recreational fishing and kayaking – Warren & South Para Reservoirs
- Adelaide International Birds Sanctuary & associated investment
- Health Facilities
- Restaurants & Agri-tourism facilities
- Entertainment & Recreation associated with growing population
- Education and Co-working Hubs
- Horticulture Greenfield parks





Ready for Investment

The Barossa Region offers a wide range of 'Investment Ready' projects and businesses value **\$12-150m**.

For regional data and information, feasibility studies, business case details and further investment opportunity information contact RDA Barossa Gawler Light Adelaide Plains.

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More information about our Region



www.barossa.org.au



www.barossa.com



www.artmusicdesignbarossa.org.au



www.pir.sa.gov.au



www.tourism.sa.gov.au



www.barossacampus.com.au



www.barossabusiness.com.au



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Gawler

