



PILLAR 6:

INFRASTRUCTURE

“Competing with overseas markets and reducing our cost of production means having efficient pathways to market and having the digital infrastructure to enable timely communication and decision-making.”

PILLAR CHAMPION WADE DABINETT

2030 VISION

The South Australian grain industry will have enhanced productivity and competitiveness as a result of public and private investment in sustainable infrastructure.



Attract \$500m of public/private investment in grain-related infrastructure in SA



Infrastructure is developed to enhance competitiveness by increasing our industry's capacity, supply-chain efficiency, connectivity and access to diverse markets



Build on SA's current digital capability to achieve widespread connectivity



The grain industry has a planned approach to its long-term infrastructure requirements

There needs to be a corresponding investment in infrastructure if the South Australian grain industry is to meet the growth targets outlined in this Blueprint.

During the past decade there has been investment in South Australian grain infrastructure, but it has come in smaller parcels — on-farm storage, additional elevation capacity, larger truck configurations and innovative bulk loading facilities. There have also been numerous standalone investments, ranging from processing outlets through to new innovative port facilities. The state's major bulk-handler Viterria has also invested significantly at many of its sites, increasing both inward elevation capacity and storage capacity. However, more large-scale grain infrastructure investment is required.

Priorities for this pillar include attracting at least \$500 million of public/private investment in grain-related infrastructure in SA in the next decade. This will involve working closely with industry and Infrastructure SA to develop a compelling business case that outlines the profit opportunity that exists from investing in grain infrastructure in SA.

Ongoing investment is needed to keep up with the industry's growth ambitions and to continue to put downward pressure on production costs so growers remain competitive nationally and internationally.

Finally, the counter-cyclical nature of grain production in Australia provides a natural advantage over Northern Hemisphere production. Therefore, the final priority in this pillar is to determine whether SA should have the practical capacity to ship its entire average export by the end of June following harvest to maintain this natural marketing advantage over grain originating in the Northern Hemisphere.

ALIGNED PLANS

The National Farmers' Federation (NFF), 2030 Roadmap

Primary Industries and Regions SA (PIRSA), SA Government and Industry, Growth State - Food, Wine and Agribusiness Draft Discussion Paper 2019

Infrastructure Australia, Infrastructure Priority List: Australian Infrastructure Plan 2018

Australian Government Department of Infrastructure, Regional Development and Cities Trends: Transport and Australia's Development to 2040 and Beyond and Delivering on Freight (2016)

Infrastructure South Australia, 20-year State Infrastructure Strategy (2020)

PILLAR 6. INFRASTRUCTURE



PRIORITIES	TARGETS	PROJECT AREAS
<p>Reduce transport costs and improve sustainability by increasing heavy vehicle road access across the state and developing strategic freight corridors.</p>	<p>1.1 Examine opportunities to reduce costs and increase the stability of input supplies to primary producers, such as fertiliser, chemicals and equipment.</p> <p>1.2 Establish minimum access levels to sites/facilities</p>	<ul style="list-style-type: none"> Examine all sites or facilities that consume, access or store over 100,000 tonnes of grain and ensure last mile access matches the classification of the connecting highway. Examine the optimal network for grain haulage and determine desired limits. All major roads used to haul grain to be a minimum of B-Double (PBS2A) with an aim to become minimum Road Train (PBS2B). Identify opportunities to increase the A-triple (PBS4A) network for grain transport. Establish an industry forum to identify and action major freight routes that do not currently meet those targets. Support the ability to increase rail efficiency including increased axle weights and additional sidings/passing lanes.
<p>Support new investment in SA's grain industry.</p>	<p>2.1 Investment is to specifically and proactively target infrastructure in line with the Blueprint.</p> <p>2.2 Maintain/improve access to existing east coast grain markets through rail development, loading access and linkages with inland rail.</p> <p>2.3 Support investment in the research infrastructure required to establish SA as a hub for agtech, agricultural research and innovation.</p>	<ul style="list-style-type: none"> Industry to work collaboratively with PIRSA, Infrastructure SA and Department for Trade and Investment to provide a detailed analysis of the economic benefit grain brings to SA. Support and recruit one agriculture-focused staff member in the Department for Trade and Investment. Encourage new entrants in established grain markets. Identify and address issues associated with the cost, efficiency and regulatory burden associated with executing coastal vessels. Conduct a review of SA's current research infrastructure and capabilities.
<p>Establish new processing facilities for grains and pulses in SA.</p>	<p>3.1 Establish processing facilities for pulses, oats, oilseeds, wheat and barley.</p> <p>3.2 Attract new capabilities in post-farm gate processing to significantly value add to grain production.</p>	<ul style="list-style-type: none"> Develop a target list of companies to attract or further invest in infrastructure in SA. Commit to expand malted barley production for domestic or export markets.
<p>Increase container export capacity and consolidate export pathways through infrastructure development to enable containerised exports to triple to 15% of total export.</p>	<p>4.1 Establish sustainable and efficient container export pathways.</p> <p>4.2 Increase container export capacity in SA through the development of required infrastructure.</p>	<ul style="list-style-type: none"> Investigate the feasibility of Whyalla as an export load point, tranship point or export container port for grain. Examine the opportunity for an intermodal terminal to complement inland rail and east-west rail traffic. Address road versus rail pricing disparity for containers at port.

PRIORITIES	TARGETS	PROJECT AREAS
<p>Build digital infrastructure to allow a 5% decrease in production costs.</p>	<p>5.1 Each farm should have the connective bandwidth to access, download and upload data to improve decision making.</p> <p>5.2 Accelerate the application of advancements in data science and connectivity.</p> <p>5.3 Telecommunications and digital infrastructure must allow for efficient data collection to improve decision making.</p>	<ul style="list-style-type: none"> • Ensure connectivity across regional SA to allow the effective use of technology in paddocks. • Establish nationally consistent integration of data systems/identification to allow for streamlined data management. • Identify a nationally consistent process to allow ease of safe movement of automated vehicles on public roads.
<p>Improve safety and decision making by providing weather information at a farm management level.</p>	<p>6.1 SA to have the most comprehensive network of Tier 2 weather stations in Australia.</p> <p>6.2 Additional Tier 1 weather station situated on the lower Eyre Peninsula.</p>	<ul style="list-style-type: none"> • Partner with the Bureau of Meteorology to determine the best locations for weather stations and find a funding solution to expand and maintain the network in ongoing and sustainable way. • Establish opportunities for primary producers to co-invest in the establishment of weather stations that meet their requirements, including real-time information.
<p>Increase SA's effective and efficient vessel loading capability to remain internationally competitive in bulk exports.</p>	<p>7.1 SA to have the practical capacity to ship the entire average export by the end of June following harvest (approximately 850,000 tonnes of practical capacity per calendar month).</p>	<ul style="list-style-type: none"> • Determine the practical capacity required for exports in each region of SA in 2030. • Determine whether there is value achieved in exporting grain in the counter-cyclical window. • Establish the required export capacity for each region to allow the full export program to occur in the December-June period. • Establish the current practical capacity for export volume and match it against a study of the requirements.
<p>Increase efficiency through adoption of technology</p>	<p>8.1 SA to have greater automation of vehicles for on-farm, logistics and handling.</p> <p>8.2 Identify emerging technologies to adopt/use throughout the grain value chain.</p>	<ul style="list-style-type: none"> • Ensure policy settings encourage the adoption and uptake of mechanical/ vehicle automation. • Proactively identify opportunities from Future Farming.