

Opportunity: Expanding and Securing Market Access – Spotlight on Markets

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**Government
of South Australia**

Department of
State Development

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.

Type equation here.



Why market access matters

- Up to 80% of South Australia's agrifood production exported, highlighting both competitive advantage and high trade exposure.
- Uncertain global market conditions:
 - Shifting geopolitical dynamics and war.
 - Rising economic protectionism.
 - Climate change impacts.
- Global partners are seeking trusted, reliable, politically stable, and sustainably-managed supply chains.

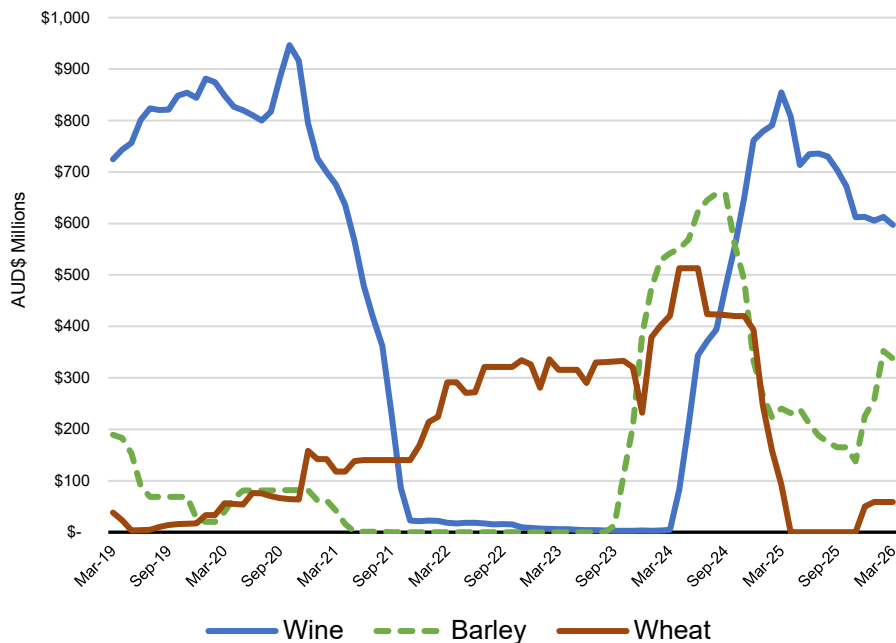
South Australia Trade and Investment Strategy to 2030

- Raising ambition for improved whole-of-state export and investment performance.
- Aims to drive productivity, economic resilience, and jobs growth.
- Priority sectors and markets linked with pillars of activity.
- In agrifood, leveraging industrial strengths and natural resources to meet Indo-Pacific food security requirements.
- In wine, strengthening South Australia's global leadership position in mature and emerging markets.

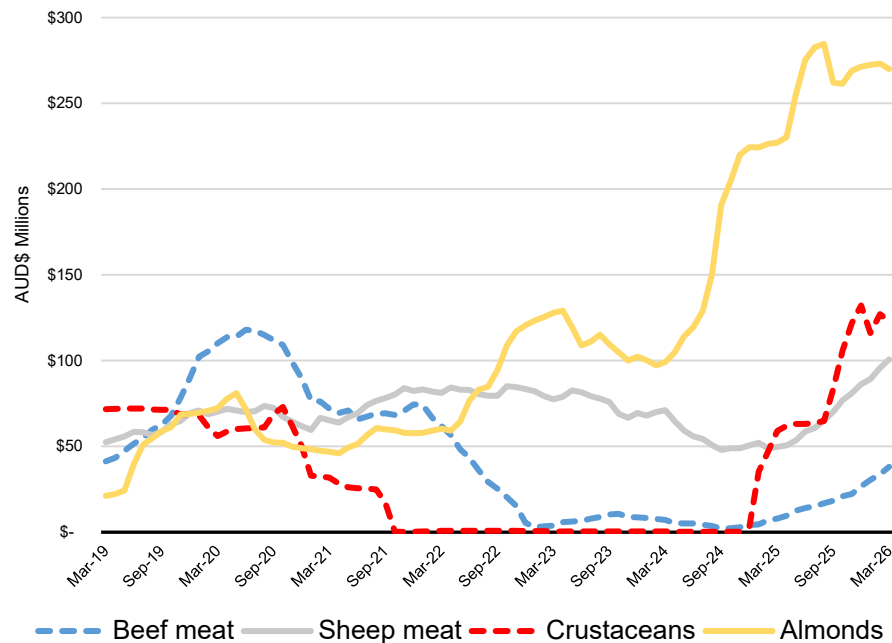


Trade with China

Top South Australian agrifood exports to China
March 2019 to March 2026



Other key South Australian agrifood exports to China
March 2019 to March 2026

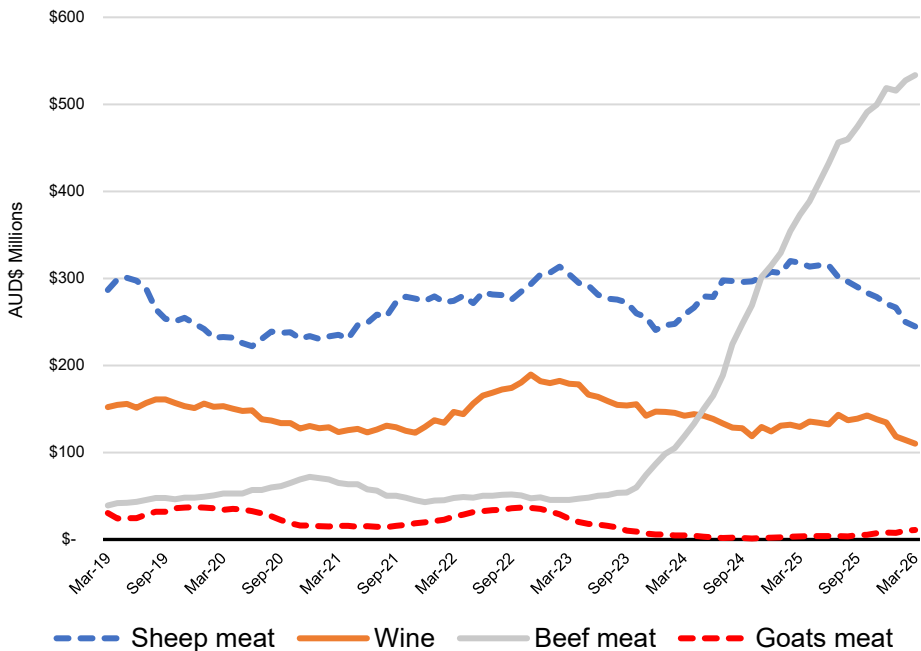


China: lessons learned and what's next

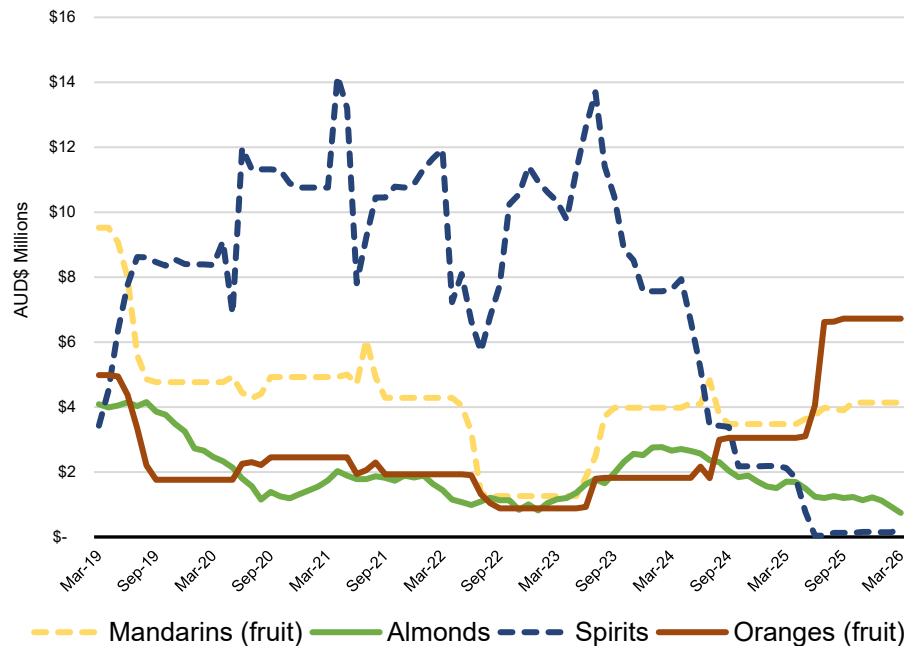
- Emerging from a challenging period it's important to:
 - Reiterate our role as food security partners.
 - Demonstrably move beyond the transactional.
 - Defend and advance market access, including through ChAFTA.
 - Explore new market channels, including quick commerce.
 - Align across sectors and value chains.
 - Understand the bigger geopolitical picture.

Trade with the United States

Top South Australian agrifood exports to the US
March 2019 to March 2026



Other key South Australian agrifood exports to the US
March 2019 to March 2026

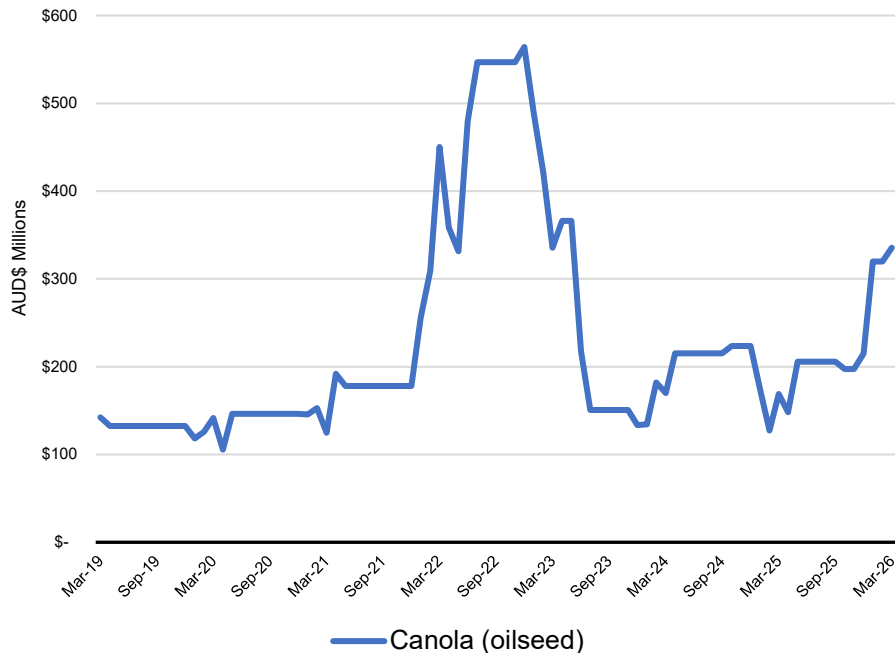


North America: resilience and adaptability amidst uncertainty

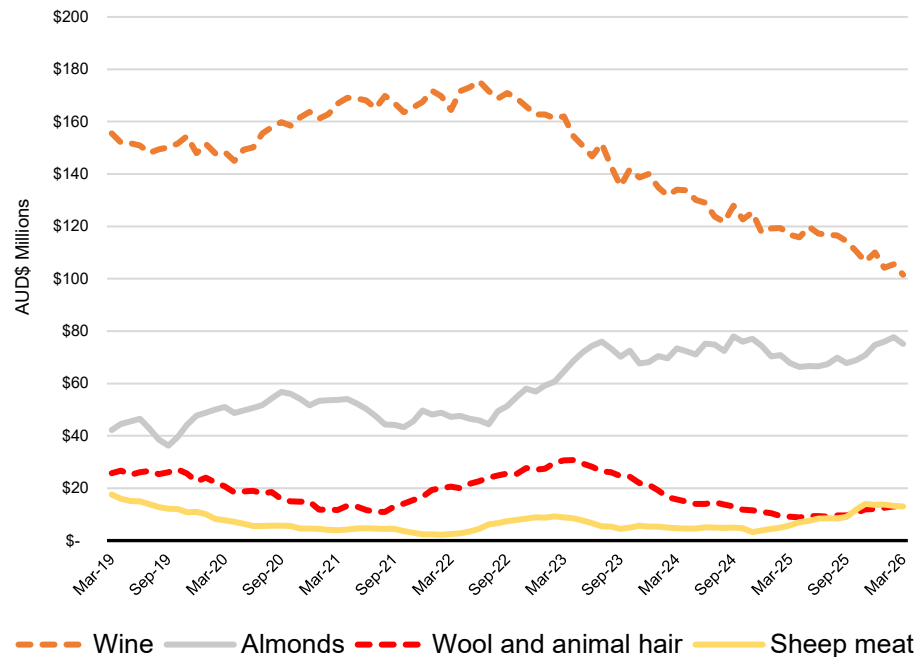
- Change is the constant but Australia well placed.
- South Australia has a special place in the alliance and that matters.
- Market segmentation, importer relationships, and boots on ground important.
- Canada a bright spot:
 - Demand for premium products, including wine, beef and lamb.
 - A well-disposed partner in free and open trade.

Trade with the European Union

South Australian canola (oilseed) exports to the EU
March 2019 to March 2026



Other key South Australian agrifood exports to the EU
March 2019 to March 2026

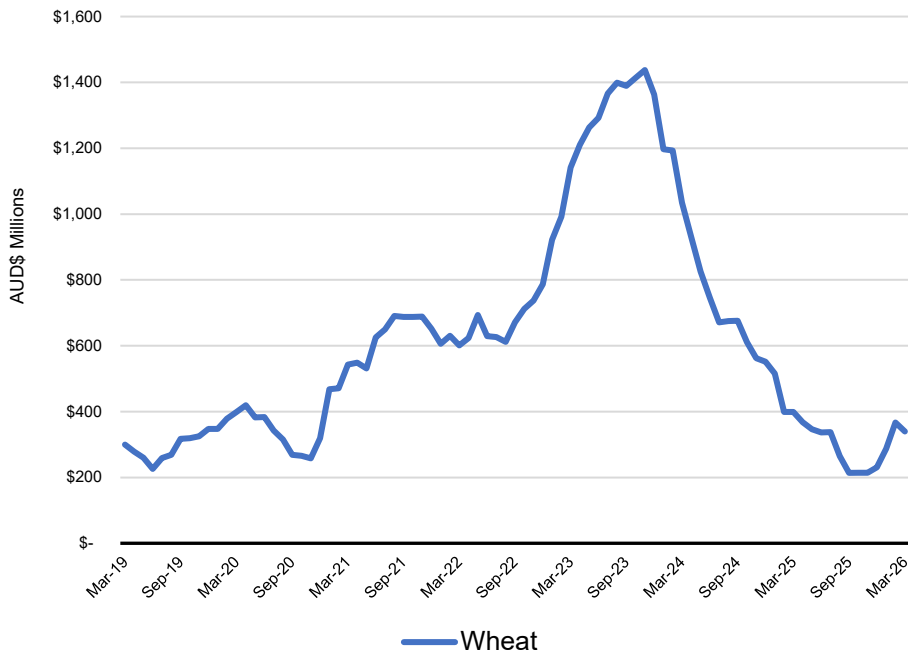


European Union: an unrealised export opportunity

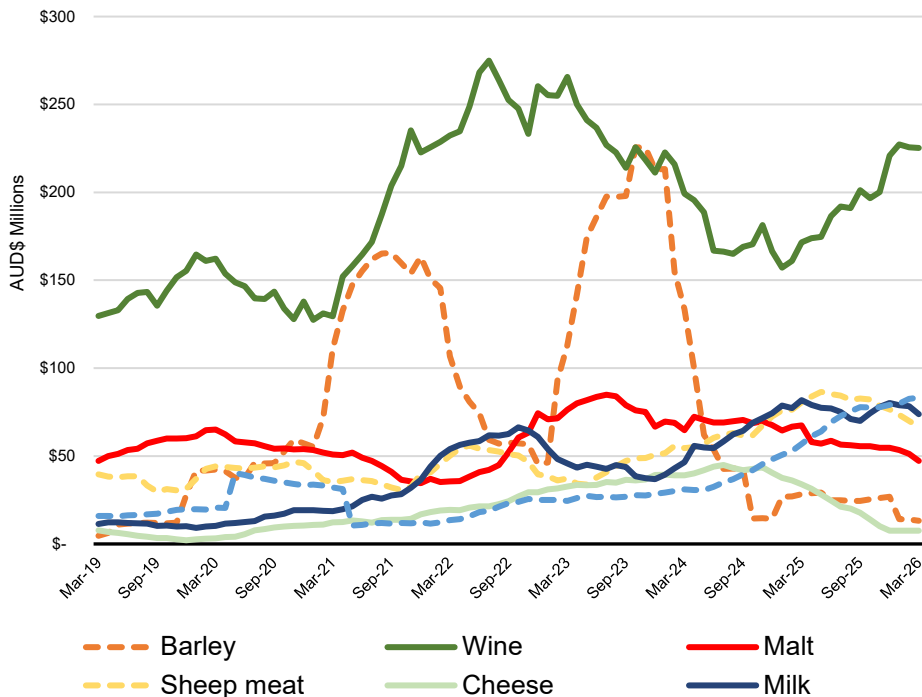
- Australia-EU FTA will improve market access to the world's second largest economic region and 450 million consumers.
- But EU will continue to protect its most sensitive industries through quotas, safeguards and geographic indications.
- Exporters should prepare now – understand access requirements.
- Sustainability and decarbonised supply chains matter for the EU.
- Australian Government investing to support FTA implementation.

Trade with Southeast Asia

South Australian wheat exports to ASEAN
March 2019 to March 2026



Other key South Australian agrifood exports to ASEAN
March 2019 to March 2026

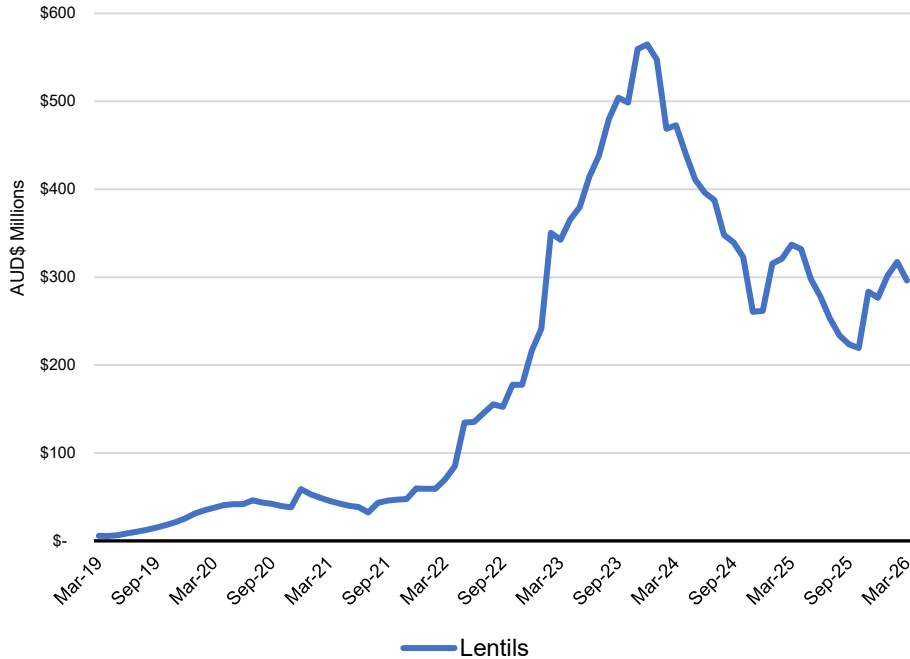


Southeast Asia: natural partners in food security

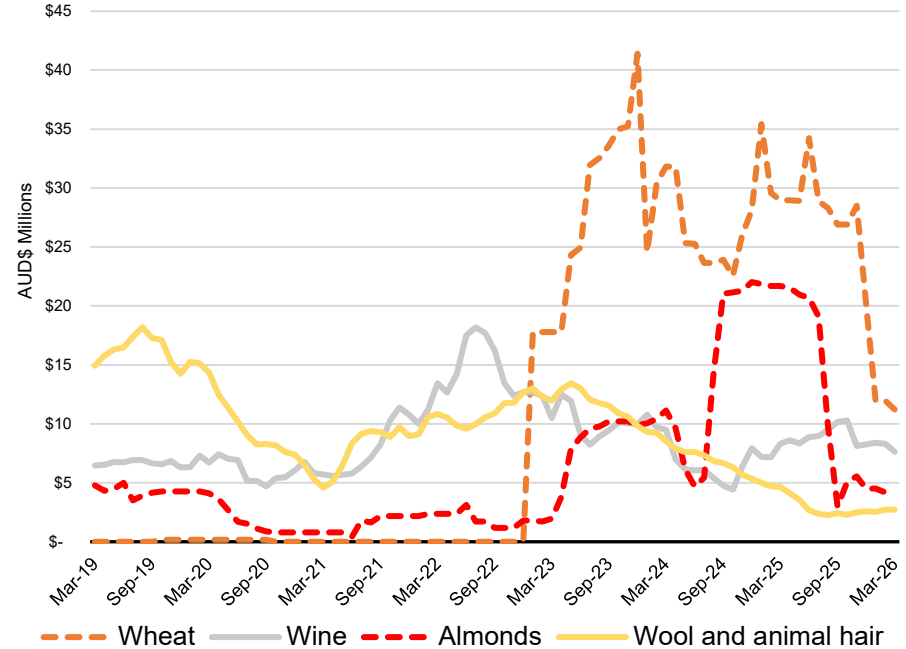
- Presents opportunities across all segments – from premium F&B in Singapore to bulk commodities for Thailand, Indonesia, Vietnam.
- Whole-of-state effort required to position as food and energy security partner for a region exposed to geoeconomic shifts.
- Complementary market access provisions under AANZFTA, RCEP, CPTPP – leverage tools to navigate.
- Substantial Australian Government and DSD investment in the region – leverage programs and initiatives.

Trade with India

South Australian lentils exports to India
March 2019 to March 2026



Other key South Australian agrifood exports to India
March 2019 to March 2026



India: growth opportunities for the medium and long term

- Unmatched demand for bulk agricultural commodities – particularly pulses – but market access oscillates.
- Food security a key domestic political consideration.
- ECTA – our interim FTA – delivered best-in-class outcomes and points to India's ambition for liberalisation.
- F&B opportunities in major metros but partnership selection vital.
- Huge e-commerce ecosystem can be a lower risk path to market.



How we support South Australia's agrifood and wine industries

- Case management and capability building
 - TradeStart Program
 - Invest SA
 - International Office Network
- Sector partnerships
 - Premium Food and Beverage Export Program
 - Global Wine Growth Program
- Business missions and grants
 - Ministerial and Business Missions Program
 - Export Diversification Program
 - Investment Accelerator Program
- Trade and investment policy and regulatory impact
 - Government-to-government advocacy
 - Input to free trade agreement negotiations



Industry resources

[DSD Programs](#)



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Go Global Toolkit](#)



[FTA Portal](#)



Q&A