

# Key Industry Sectors for Growth



## Agriculture

*Irrigation and the Mediterranean climate make the Mildura, Sunraysia region ideal for growing high quality dried fruits.*

**Peter Jones**  
Immediate Past Chairman,  
Australian Dried Fruits  
Association Inc.

The Mildura region is steeped in history as a major agricultural and horticultural centre. This proud history holds true today as agriculture, horticulture and fruit and vegetable processing continue to grow and significantly contribute to the economy and character of this region.

### Fruit Fly Exclusion Zone

The Mildura region is proud of its fruit fly free status. The Greater Sunraysia region has been accorded an annual window of opportunity for Pest Free Status which gives it easier access to export markets.

The fruit fly is a great threat to fruit and vegetable growers and has the potential to devastate the agricultural and horticultural industries in the Mildura region. Fruit flies can lay their eggs in a wide variety of fruit and some vegetables. Infected fruit can look perfectly fine on the outside, but on the inside it will be infested, brown and mushy. Infections can spread quickly.

Generally speaking, fruit flies cannot travel very far, unless they are carried by unsuspecting humans carrying fruit and vegetables. The Fruit Fly Exclusion Zone, as well as the Greater Sunraysia Pest Free Area both protect the growers in the Mildura region and this strong tradition of agriculture and horticulture. It is forbidden to take any fruit or vegetables into these areas as outbreaks of fruit fly will jeopardise producer's ability to sell product into important markets.

To help protect fruit and vegetable growing regions in South Australia, northern Victoria and southern New South Wales, areas of these states are protected by the Fruit Fly Exclusion Zone, the Greater Sunraysia Pest Free Area and Protected Areas in the Riverina. You cannot take fruit or fruiting vegetables into these areas. Large fines exist for those people caught bringing in fruit or vegetables whether they contain fruit fly or not.

### Fruit Fly Exclusion Zone Map



Source: [www.fruitfly.net.au](http://www.fruitfly.net.au) (2009)

## Wine and Wine Grapes

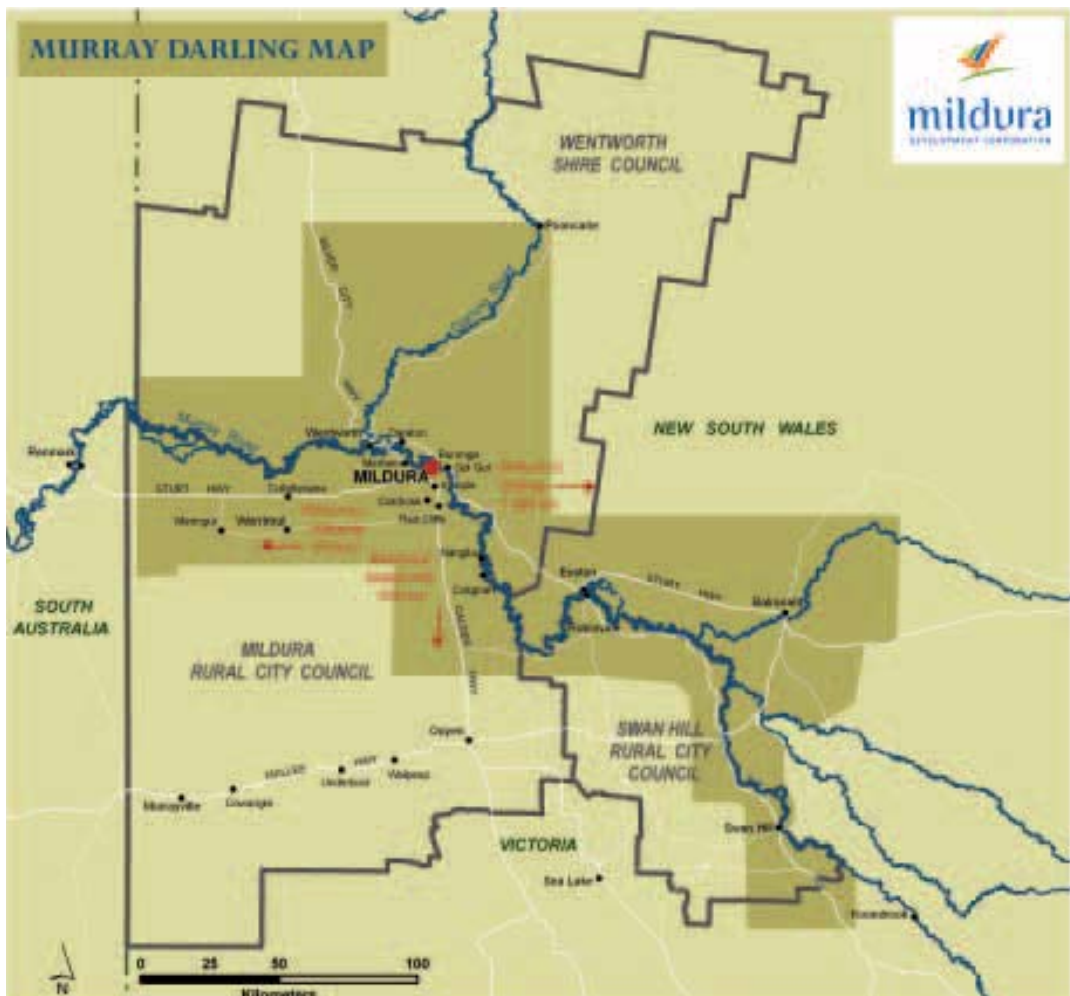
The Murray Darling and Swan Hill region is a significant grape growing and wine production area in Australia, crushing over 365,211 tonnes of wine grapes and roughly 20% of the total Australian grape crush in 2008. Much of the wine from the region is exported, with primary markets being the United States and the United Kingdom. The following tables highlight the varieties of grapes that are grown in the Murray Darling and Swan Hill region and the range of wines produced.

*Mildura is positioned in the heart of the Murray-Darling wine region, among the largest and most diversified of Australia's wine production zones. All the major grape varieties are grown in the region for most of the best-known and successful international wine brands.*

Mike Stone  
Chief Executive Officer,  
Murray Valley Winegrape  
Growers'



The map below highlights the Murray Darling and Swan Hill winegrape growing region.



## Red Grape Varieties for Wine in the Murray Darling and Swan Hill Region

20% of Australia's wine is crushed in the Murray Darling and Swan Hill region.

Variety	Winery Grown 2008 (tonnes)	Total Crush 2008 (tonnes)
Cabernet Sauvignon	6,100	41,664
Dolcetto	532	638
Durif	52	135
Grenache	99	1,188
Malbec	52	52
Mataro (Mouvedre)	95	410
Merlot	6,789	29,484
Muscat a Petit Grains Rouge / Rose	-	80
Other Red	1,136	1,543
Petit Verdot	604	2,521
Pinot Noir	322	2,358
Red Globe	-	58
Ruby Cabernet	1,505	2,542
Sangiovese	731	1,209
Shiraz	8,572	58,750
Tarrango	1,265	1,494
Tempranillo	15	260
<b>Total</b>	<b>27,938</b>	<b>144,504</b>

Source: AECgroup; VIC Dept. of Primary Industries, *Australian Regional Wine Grape Crush Survey Murray Darling / Swan Hill* (2008)

Note: Figures represented include production from Swan Hill area, which is outside the Mildura region. Winery grown figures represent only those figures reported by wineries surveyed. Not all wineries were surveyed and of those surveyed, not all replied. "Winery Grown" grapes refer to locally grown grapes, "Total Crush" includes grapes grown in other regions that are crushed in the Mildura region.



## White Grape Varieties for Wine in the Murray Darling and Swan Hill Region

Variety	Winery Grown 2008 (tonnes)	Total Crush 2008 (tonnes)
Canada Muscat	4	477
Chardonnay	20,523	125,117
Chenin Blanc	-	939
Colombard	1,025	18,535
Crouchen	1,534	2,457
Muscat a Petit Grains Blanc	-	98
Muscat Gordo Blanc	166	16,553
Orange Muscat	448	557
Other white	-	5,338
Pinot Gris	1,569	11,911
Riesling	532	1,854
Sauvignon Blanc	5,884	12,050
Semillon	6,408	12,960
Sultana	-	6,599
Taminga	10	10
Traminer	-	269
Trebbiano	-	90
Verdelho	709	1,851
Viognier	532	272
<b>Total</b>	<b>39,435</b>	<b>220,707</b>

Source: AECgroup; VIC Dept. of Primary Industries, *Australian Regional Wine Grape Crush Survey Murray Darling / Swan Hill* (2008)

Note: Figures represented include production from Swan Hill area, which is outside the Mildura region. Winery grown figures represent only those figures reported by wineries surveyed. Not all wineries were surveyed and of those surveyed, not all replied. "Winery Grown" grapes refer to locally grown grapes, "Total Crush" includes grapes grown in other regions that are crushed in the Mildura region.

## Wine Production in the Murray Darling and Swan Hill Region

	Hectares Grown 2006	Total Wine Crush 2008 (tonnes)	Wine Crush 2008 (% of Australian Total) (a)	Production Value 2008 (M\$)
Red	8,757	144,504	15.1%	\$90.1
White	13,383	220,707	25.3%	\$113.4
<b>Total</b>	<b>22,140</b>	<b>365,211</b>	<b>19.9%</b>	<b>\$203.7</b>

Source: AECgroup; VIC Dept. of Primary Industries, *Australian Regional Wine Grape Crush Survey Murray Darling / Swan Hill* (2008); ABS Cat. No. 1329 (2008); SunRise 21 (2006).

Note: Hectares grown are sourced from SunRise 21 2006 crop report and are for the Murray Darling area and are not to be used in conjunction with production figures above. (a) Australian production volume of wine crush is based on 2007-2008 information.

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*74% of Australia's table grapes are grown in and around the Mildura region.*

## Table Grapes

Table grapes are another crop in which the Mildura region leads the country. Roughly 74% of all table grapes in Australia are grown in and around Mildura. The Australian Table Grape Association is also based in Mildura.

### Table Grapes in NW Victoria, Big Rivers NSW and Lower Murray SA Region

Crop	Hectares Grown 2006	Production Volume 2009 (tonnes)	Production Volume 2009 (% of Australian Total)	Production Value 2009 (M\$)	Export Volume 2009 (tonnes)
Table Grape (all varieties)	8,165	92,500	74%	\$240	59,375

Source: AECgroup; ABS Cat. No. 1329 (2008); Australian Table Grape Association (2009); SunRise 21 (2006).  
Notes: Production figures taken from ABS regional districts NW Victoria, Big Rivers NSW and Lower Murray, which are larger than the Mildura region. Production value for Mildura region is based on total production in Australian and export figure assumes national average of exports of table grapes. Hectares grown are sourced from SunRise 21 2006 crop report for the Murray Darling area and should not be used in conjunction with production figures above.

### Australian Table Grape Association

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## Dried Grapes

The Mildura region produces 98% of Australia's dried grapes and is home to the Australian Dried Fruit Association, a peak industry body representing the interests of growers that dates back to 1895.

### Dried Vine Fruit in the Murray Darling Region

Variety	Hectares Grown 2006	Production Volume 2009 (tonnes)	Production Volume 2009 (% of Australian Total)
Sultanas	3,765	12,535	98.0%
Currants	380	2,030	95.0%
Raisins	261	1,121	100.0%
Other	645	1,688	98.0%
<b>Total</b>	<b>5,050</b>	<b>17,374</b>	<b>98.0%</b>

Source: AECgroup; Australian Dried Fruit Association (2009); SunRise 21 (2006).  
Note: Hectares grown are sourced from SunRise 21 2006 crop report and should not be used in conjunction with production figures above.

*Sunbeam sees Sunraysia as the perfect environment to base its operations.*

Chris Ellis

General Manager,  
Domestic Fruit Supply,  
Sunbeam Foods Pty Ltd

### Australian Dried Fruits Association Inc.

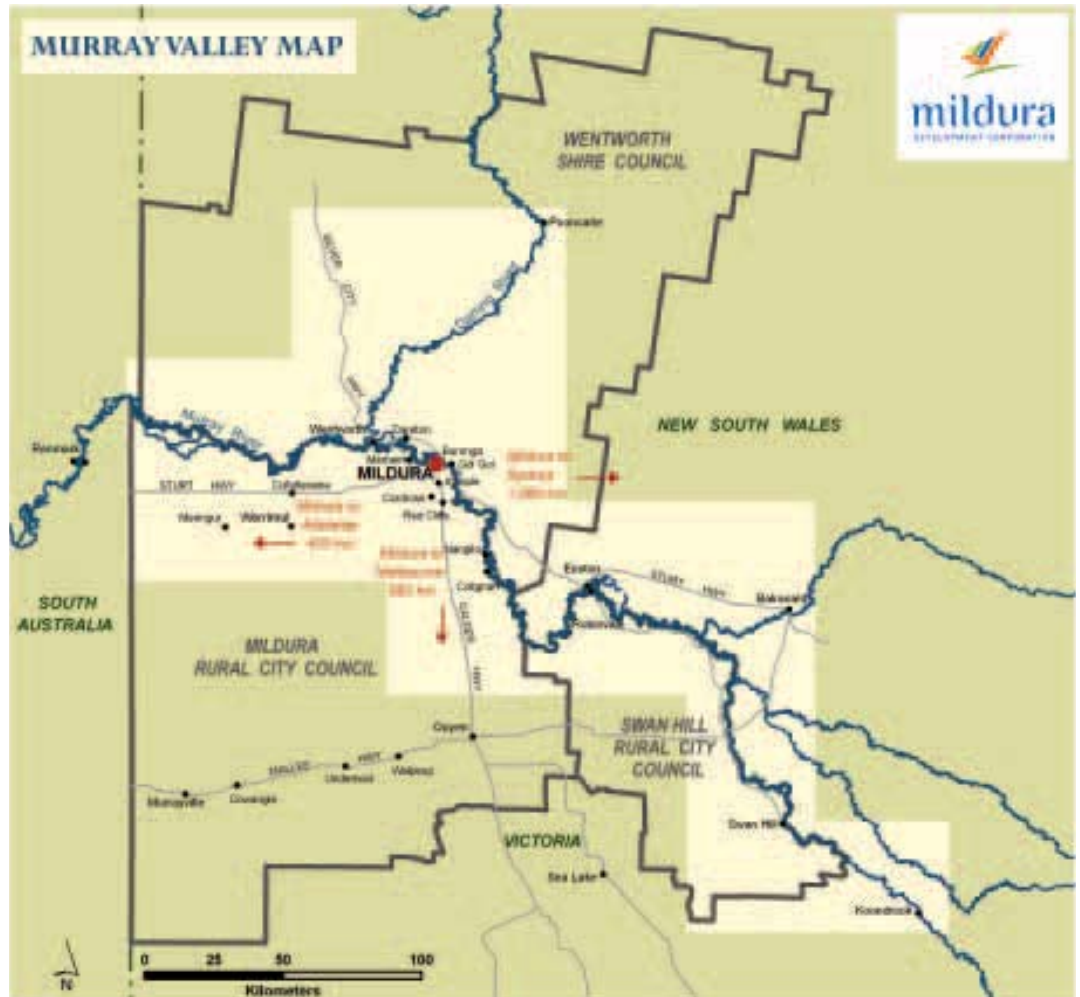
31 Deakin Avenue, Mildura Vic 3500  
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[www.adfa.asn.au](http://www.adfa.asn.au)



## Citrus Crops

The Murray Valley region, which incorporates Mildura (see map next page), is also a significant citrus growing region, producing over a third of the Navel orange and Grapefruit crop in Australia. Mildura is also the headquarters of Citrus Australia Ltd, the peak body of the citrus industry in Australia and is also the location for the office of the Murray Valley Citrus Board that provides a wide range of information and services to citrus growers, packers and marketers in the region.

24% of Australia's citrus is grown in the Murray Valley region.



### Citrus in the Murray Valley

Crop	Planted 2009 (Ha)	Fruit Bearing 2009 (Ha)	Production Volume 2008-2009	Production Volume 2008-2009 (% of Australian Total)
Navel	4,068	3,628	66,263	34.9%
Valencia	1,125	1,110	25,020	10.3%
Mandarin	737	455	11,119	8.5%
Lemon/Lime	128	120	4,150	5.0%
Grapefruit	191	178	4,531	40.0%
Tangelo	90	82	2,463	100.0%
<b>Total</b>	<b>6,339</b>	<b>5,573</b>	<b>113,546</b>	<b>24.3%</b>

Source: AECgroup; Murray Valley Citrus Board (2009).  
 Note: Production figures above are derived from the Murray Valley.



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## Vegetables

While not as significant as other crops, the Mildura region still produces a large amount of vegetables every year, much of which goes to domestic consumption like lettuce and many varieties of melon. Additionally, many vegetable products are exported such as carrot juice and green asparagus.

### Vegetables in the Mildura Rural City Council and Wentworth Shire Council

Crop	Hectares Grown 2008	Production Volume 2008 (tonnes)	Production Volume 2008 (% of Australian Total)	Production Value 2008 (M\$)	Production Value 2008 (% of Australian Total)
Carrot	1,000	30,000	11.0%	\$10.5	6.64%
Melon	450	15,300	7.5%	\$11.3	6.51%
Asparagus	300	900	16.0%	\$3.6	13.74%
Potato <sup>(a)</sup>	500	14,000	1.0%	\$4.2	0.82%
Lettuce	250	7,500	1.0%	\$2.6	0.93%
Zucchini & Squash	120	1,800	8.0%	\$1.8	2.58%
Capsicum & Chilli	40	1,920	3.0%	\$1.7	1.21%
Eggplant	50	750	<1.0%	\$0.8	<1.0%
Pumpkin	100	2,500	3.0%	\$0.7	0.96%
Other	-	-	0.0%	\$4.0	0.00%
<b>Total</b>	<b>2,810</b>	<b>74,670</b>	<b>NA</b>	<b>\$41.1</b>	<b>NA</b>

Source: AECgroup; Horticulture Australia, NSW Dept. of Primary Industries (2009); VIC Dept. of Primary Industries (2009)

Note: Potatoes are grown in Murrayville VIC and 40kms beyond the boundary of the Mildura Region at Boundary Bend. Other vegetables grown in the region include bean, garlic, pea, cauliflower, cucumber, okra, broccoli, spinach, tomato and onion. Some columns may not sum due to rounding errors.

## Nut Crops

The Mildura region is a nationally significant nut growing region, specifically for almonds and pistachios. The Sunraysia region is one of four major almond growing regions in Australia, and has the fastest growing almond industry in the world. There have been extensive plantings of almonds since 1999, representing growth of over 600%!

There are about 25 pistachio growers in Australia (4 large and 21 smaller growers), with about 550 hectares of trees planted. Australian Pioneer Pistachio Company has recently completed the construction of a new hulling and grading plant at Robinvale, Victoria.

### Nuts in the Sunraysia Region

Crop	Hectares Grown 2009	Production Volume 2009 (tonnes)	Production Volume 2009 (% of Australian Total)	Production Value 2009 (M\$)	Production Value 2009 (% of Australian Total)
Almond <sup>(a)</sup>	8,599	16,900	65.0%	\$116.5	65%
Pistachio	200	1,800	41.0%	\$10.8	41%

Source: AECgroup; Australian Pioneer Pistachio Company (2008); Almond Board of Australia (2008); Industry consultation.

Note: Almonds are predominantly grown at Lake Cullulleraine, Mildura and surrounding areas, Robinvale / Boundary Bend and surrounding areas and Piangil. Pistachio production is concentrated around Robinvale and Nangiloc. (a) Almond figures are for 2008.



## Olives and Olive Oil

Olive growing has expanded significantly in recent years. Since 2004, the hectares of olives grown has expanded fourfold. Production of olives since 2004 has grown by 1,450%! Boundary Bend Estate (located in the Swan Hill region) has planted extensive olive groves and has pioneered mechanical harvesting that enables rapid movement of the fruit from trees to the oil extraction plant. Boundary Bend is exporting its olive oil all around the world and is reaping the benefits from its bountiful harvest and world leading technology.

## Olives and Olive Oil in the Swan Hill region

Crop	Hectares Grown 2008	Production Volume Olives 2008 (tonnes)	Production Volume Olives 2008 (% of Australian Total)	Production Value Olive Oil 2008 (litres)	Production Value 2008 (M\$)	Export Volume 2008 (litres)
Olives	3,860	13,000	22.8%	1,800,000	\$9.0	900,000

Source: AECgroup; Boundary Bend Estate (2008); Robinvale Estate Olive Oil (2008); ABS Cat. No. 7121 (2008).

Note: Boundary Bend Estate and Robinvale Estate Olive Oil are both located in the Swan Hill LGA. For national comparisons, information from 2006-2007 was used.

## Dryland Farming (Grains)

While relatively small compared to other grain growing regions in Australian, the grain industry in the Mildura region is well established and makes up part of the agricultural tradition of the region. The impact of climate change and low rainfall patterns has been effecting the production of grains in the region resulting in declining yields in recent years.

### Grain Growing in the Mallee Region

Grain Crop	Hectares Grown 2008	Production Volume 2008 (tonnes)	Production Volume 2008 (% of Australian Total)	Production Value 2008 (M\$)	Production Value 2008 (% of Australian Total) <sup>(a)</sup>
Wheat	820,000	574,000	4.15%	\$195.2	3.60%
Barley	375,000	300,000	4.17%	\$102.0	4.54%
Oats	50,000	30,000	1.94%	\$8.6	2.09%
Canola	15,000	3,000	0.24%	\$2.2	0.33%
<b>Total</b>	<b>1,260,000</b>	<b>907,000</b>	<b>1.45%</b>	<b>\$307.9</b>	<b>3.52%</b>

Source: AECgroup; VIC Dept. of Primary Industries (2009); ABS Cat. No. 7111 (2008); ABS Cat. No. 7501 (2009)

Note: The Mallee Region is made up of the Local Government Areas of Mildura, Swan Hill and Buloke. Comparisons to national statistics based on 2007-2008 information from the ABS. (a) Column will not sum. % represents the total production value in the Mallee region compared to the national total value of the selected grain crop.

## Livestock (Sheep)

Beyond crops of fruit and vegetables, the Mildura region also has a vibrant livestock industry, including the *Prime Mallee Lamb* trademark. There are two major saleyards in the region, the Ouyen Livestock Exchange and the Yelta Saleyards.

### Livestock in the Mildura Rural City Council LGA

Livestock (Sheep)	Volume 2007-2008 (Number of Sheep)	Volume 2007-2008 (% of Australian Total)	Value of Sheep 2007-2008 (M\$)
Ouyen Saleyard	219,069	0.28%	\$6.0
Yelta Saleyard	38,500	0.05%	\$1.05
<b>Total Sheep</b>	<b>257,569</b>	<b>0.33%</b>	<b>\$7.05</b>

Source: AECgroup; Ouyen Saleyards (2008)

Note: In order to calculate the value of sheep in Mildura, the national average price per sheep in 2007-2008 was used.



## Honey Bee

As a large horticultural area, honey bees are very important in the Mildura region, particularly for the pollination of almond, avocado and melon crops. While the region does produce some honey and bees wax, pollination is an industry in itself. There are over 6,000 hives based in the region that produced over \$1 million in 2007-2008.

In order to pollinate the region's vast almond plantations, between 60,000 and 70,000 bee hives are brought into the region from as far away as the East Coast and Queensland in order to meet the huge demand that pollination creates, generating up to \$4.2 million.

Bee keepers in the Mildura region also service other regions including South Australia.

## Honey in the Sunraysia Region, 2007-2008

Product	Production Volume 2007-2008 (tonnes)	Production Volume 2007-2008 (% of Australian Total)	Production Value 2007-2008 (M\$)	Production Value 2007-2008 (% of Australian Total)
Honey	600	2.0%	\$1.80	2.0%
Bees Wax	7	NA	\$0.04	0.8%

Source: AECgroup; Australian Honey Bee Council (2008); Industry consultation.

Note: NA – Not Available. For the purposes of this information, the Sunraysia region extends from the South Australia border to Robinvale along the Murray River.



*As a key supplier to the Australian wine and beverage industry we have been able to grow as the region's wine industry has taken advantage of domestic and global opportunities for their own growth.*

**Damien Matthews**  
Managing Director,  
GTS Freight Management  
Pty Ltd

## Manufacturing

The Mildura region has been actively diversifying and developing additional value to its core strengths through numerous manufacturing sectors. This activity in advanced manufacturing has brought significant value to the region. There are numerous active industry clusters and many poised for continued growth in the future.

### Food and Beverage

The food and beverage manufacturing sector is a natural fit with the Mildura region due to its strength in agricultural and horticultural production. This activity offers synergies with numerous other operations in the region, beyond the primary production of food, including the growing transport and logistics sectors, machinery and equipment manufacturing and a wide variety of services.

Some of the products manufactured in the Mildura region include numerous varieties of wine, fruit and vegetable juices and concentrates as well as other types of food products. It is estimated that this sector currently employs 1,587 workers and is poised for future growth as the population of Australia continues to grow and generate demand for food and beverage products.

### Wine

The Murray Darling region boasts nearly 40 wine producers, ranging from boutique to large scale wineries. They have the capacity to crush between 5 and 120,000 tonnes of wine grapes each annually. The region has the capacity to produce over 400,000 tonnes of wine grapes per annum and approximately 20% of the national crush from more than 40 different varieties. The mainstream varieties are Chardonnay, Shiraz, Cabernet Sauvignon and Merlot with new and emerging varieties planted and increasing each year including Pinot Grigio, Pinot Noir and Temranillo.

The Murray Darling wine growing region contributes significantly to the national wine industry, with many of Australia's most recognised and successful brands sourcing wine from this region. In 2007/2008 over 300 medals were won by Murray Darling wineries from national and international wine shows.

One of the largest wineries in the Mildura region is Lindemans Karadoc complex which was established in 1973. The site includes wine production, packaging and a national distribution centre; as well as a popular cellar door. Karadoc's focus is on production of commercial wines. It is considered a key Lindemans site, with international markets in the USA and Europe. Its packaging facility predominantly packages wine for the Australian market. It receives and packages wine from several wineries in the Foster's Group. The Karadoc Warehouse is the National Distribution Centre for domestic wine. It supplies wine to all state distribution centres and warehouses and delivers directly to major customers.

*The region's infrastructure, central location and strong support services have enabled us to further develop our operations at Karadoc.*

**Wayne Falkenberg**  
Regional Winemaker,  
Lindemans Karadoc

*Apart from being close to our suppliers, Sunraysia has all the resources required for modern food manufacturing and most importantly gives ready access to a talented, committed workforce who enjoy living a vibrant regional centre.*

**Chris Ellis**  
General Manager  
- Domestic Fruit Supply,  
Sunbeam Foods Pty Ltd

The site is now Australia's largest sparkling wine producer with carbonation, charmat and tirage sparkling wine capability up to 500 kilolitres per week.

Karadoc is one of the top three employers in the Sunraysia region with around 250 permanent employees plus casual contractors during vintage and peak production periods.

Current crush capacity is 85,000 tonnes of grapes. The winery can process up to 2,500 tonnes of grapes per day, with a red ferment capacity of 7,000 tonnes per fill. Total wine storage capacity is 114 million litres with the largest tanks being 1.5 million litres making them the largest tanks in the Australian wine industry.

## Fruit and Vegetable Processing

With an abundance of fruit and vegetable production, value-adding processing is a well established industry in the Mildura region. Carrot juice is a big export for the Mildura region and becomes the key ingredient into many dishes in Japan and other Asian countries. As agricultural production continues to grow, the fruit and vegetable processing sector is likely to grow as well.

Mildura is home to Australia's largest orange packer and exporter, Mildura Fruit Company (MFC). MFC markets a full range of citrus fruits around the world. MFC sources quality citrus from approximately 130 citrus growers along the Murray and Darling Rivers including the Mildura region.

Large volumes of quality citrus are sourced from an extensive harvest area. MFC's largest twenty suppliers deliver greater than 50% of their intake. MFC packs out of a single, very large packing-house, located in Mildura and employs 40 permanent staff and 220 casual staff to meet seasonal and shift requirements. MFC is one of the world's most technologically advanced citrus packers, making extensive use of bar code scanning and computerised fruit sizing and sorting equipment.

In recent years, MFC has spent in excess of A\$7 million on major plant upgrades and shed expansion, to cope with a steady growth in packing and marketing demand, which is forecast at 3.5 million carton output in 2009. MFC's operation consists of 2 large capacity packing lines that enable the full range of citrus products to be sorted and packed with little interruption throughout the busy navel and mandarin season. MFC is well supported by an established, worldwide customer base and in 2008 greater than 85% of MFC's carton production was shipped to overseas destinations; including USA, Canada, Japan, Hong Kong, Malaysia, Singapore, Indonesia, New Zealand, India, Bangladesh, Russia, the Middle East and Europe. MFC also has significant market share in Australian wholesale markets and supermarkets.

SdS Beverages Pty Ltd (located in the Mildura region) is the largest vegetable concentrate manufacturer and one of the top three manufacturers of base blended fruit concentrates and fruit pastes in Australia.

The company employs 45 people and focuses mainly on vegetable juice, carrot juice, concentrate and pulp. SdS processes up to 35,000 tonnes of carrots annually and purchases approximately 80% of carrots from the Mildura region. Carrot juice is predominantly made for the export market where 85% is exported to Japan and 15% sold to the domestic market.

The principal activities of SdS Beverages are:

- Import and blend citrus concentrates into value added juices/drinks
- Process vegetables into value added concentrates/pulps
- Process dried fruits into fruit pastes/purees

## Dried Grapes

With 98% (or 17,000 tonnes) of Australia's dried grapes produced in the Mildura region it is not surprising that the region is home to Sunbeam, Australia's largest dried fruit company.

Sunbeam, which also includes the Angas Park brand, services the export, retail and food services markets. Sunbeam employs 160 staff within Sunraysia and produces over 20,000 tonnes of dried grapes and dried tree fruit annually.



*The business was established in Mildura by the Andriske family in 1947. Since the acquisition by Titan Europe, the business has continued to grow to a level that Mildura has supported in infrastructure and industry.*

**Clinton Taylor**  
Production Manager,  
Titan Wheels Australia  
Pty Ltd

*Mildura is an ideal site for our operation, and many other industries looking to decentralise, Mildura has it all.*

**Geoff Redman**  
Director,  
AusPlaztik Pty Ltd

## Machinery and Equipment

An additional sector that has tremendous synergies with the food industry is Mildura's machinery and equipment manufacturing sector, which provides a lot of equipment to these operations. Having numerous companies nearby that share so many synergies becomes an incentive for additional companies to move to the area.

Titan Wheels Australia Pty Ltd, (part of the global Titan Europe Group of companies), is the world's largest wheel manufacturer is located in the Mildura region. Titan Wheels Australia offers the widest range of engineered wheels available in Australia to the industrial, mining, earthmoving, crane, and agricultural markets.

They design, develop and manufacture wheels to the "off road" industry. On-site manufacturing facilities include advanced production machinery including CNC lathes, welding equipment and heavy pressing machinery.

Titan Wheels Australia employs over 40 staff in Mildura with over 100 employees Australia wide.

## Natural Tartaric Acid

Australian Tartaric Products Pty Ltd at Colignan, just out of Mildura, Victoria, is Australia's largest manufacturer of natural Tartaric Acid, and also produces Food Grade Spirit. The facility processes considerable volumes of grape marc, grape lees, centrifuge desludge by-products created from the wine making process, producing a completely natural product from material, which would otherwise go into landfill. The company collects the above-mentioned waste from the Sunraysia, Riverland, Riverina and Barossa Valley wine growing regions.

A major ingredient in wine-making, the Tartaric Acid produced in the Mildura region is sold mainly to Australian wineries, with smaller quantities taken up by pharmaceutical companies and food manufacturers. Food Grade Spirit is also sold both to Australian wineries and internationally to be used in wine fortification and Brandy production.

Australian Tartaric Products manufacture and supply the finest quality natural Tartaric Acid, natural Cream of Tartar and pure food grade Spirit to the Australian wine industry. They are also suppliers of Citric Acid, Rochelle salt, Ammonium Tartrate, Metatartaric Acid and Potassium Tartrate.

## Emerging Industries

There are numerous emerging industries in the Mildura region, including:

- Boat Building
- Recycling
- Renewable Energy
- Packaging, and
- Aquaculture

### Boat Building

Baldwin Boats have been producing and manufacturing commercial and private vessels along the Murray River for over 30 years.

Baldwin's design, manufacture and deliver customised boats, from luxury commercial vessels, to work boats and weekenders.

Demand for the company's products and services has allowed Baldwin Boats to expand it's original factory size, invest in the latest innovative construction methods and techniques and service the entire industry up and down the length of the Murray River and beyond.

They operate a state of the art manufacturing facility, with modern equipment operated by a workforce of highly skilled fabricators, technicians, fibreglassers, fitter and turners, electricians and plumbers.

### Recycling

Local company AusPlaztik has developed and patented a blend of recycled plastic and natural fibre products for use in the agriculture, horticulture, marine and recreation industries.

AusPlaztik recycles waste plastics and agricultural films into useful products such as decking, bollards, posts and planks, for use in oyster farms, marine environments, speciality irrigation products, streetscapes, playgrounds and home garden landscaping.

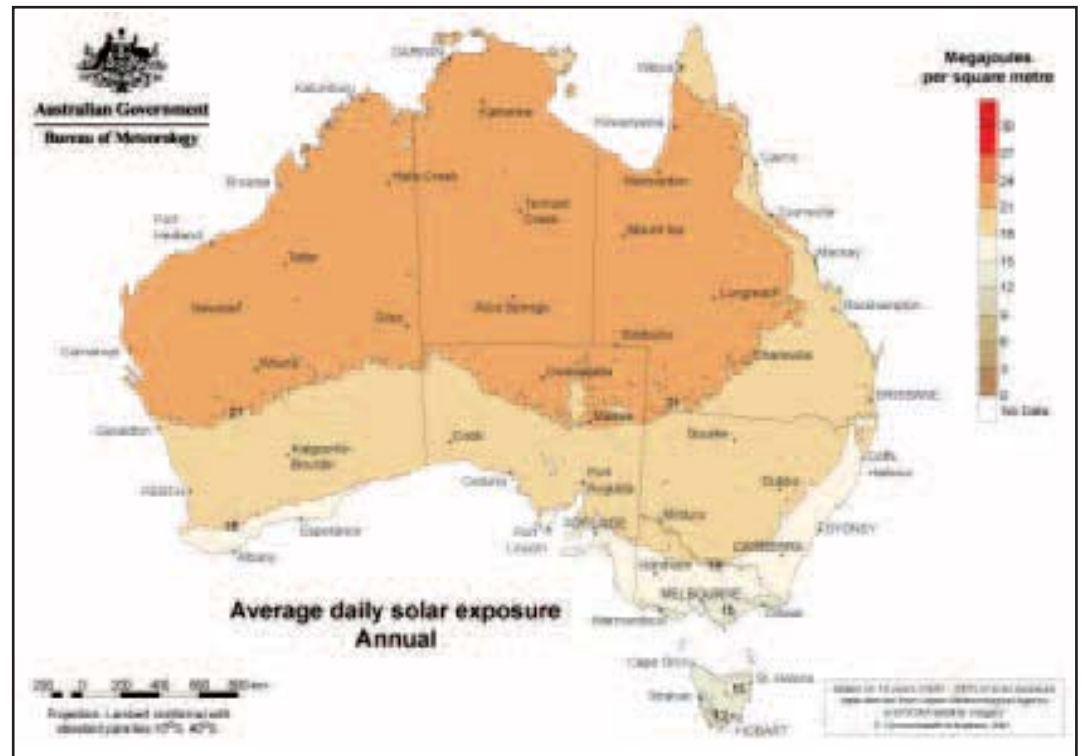
They employ 14 people and have a customer base that stretches from Perth to Cairns. This makes Mildura an ideal location as it sits on the cross-over point of all interstate freighting.

## Renewable Energy

The Mildura region has the best solar resources in Victoria, with an average of:

- 8.6 hours of sunshine per day
- Annual maximum temperature of 23.7°C
- 132.1 clear days per year
- 18.9MJ(m<sup>2</sup>m) in solar exposure

*The Mildura region is Victoria's premier solar location.*



The Mildura region is also conveniently located in a tri-state area with connections to the National electricity grid, access to flat land and water supply. Excellent transport connections (via road, rail and air), a ready source of labour along with excellent support services, make Mildura the ideal location for renewable energy development.

The first stage of a \$420 million large scale solar power station is to be built in the Mildura - Red Cliffs region. The solar power station will be built by Melbourne-based clean energy technology company Solar Systems, in partnership with project investor and leading energy management company, TRUenergy.

The project is expected to provide many economic benefits, such as the creation of up to 950 new jobs at the peak of construction and up to 45 new direct full-time ongoing jobs. A large majority of local positions will be filled by workers from within the Mildura region.

There will also be numerous opportunities for local suppliers and regionally based manufacture and component assembly. When complete, the Mildura solar power plant will be one of the largest and most efficient concentrated solar power plants in the world and will generate carbon free power. Construction of the two megawatt pilot plant is due to commence in 2010, with the 154 megawatt power station due for completion in 2013.

Development of the solar power station was made possible following a A\$292 million development agreement between TRUenergy and Solar Systems, as well as State and Federal government grant funding of \$125 million.

For more information on Solar Systems please visit [www.solarsystems.com.au](http://www.solarsystems.com.au)  
For more information on TRUenergy please visit [www.truenergy.com.au](http://www.truenergy.com.au)

## Tourism in the Mildura Region

Tourism is a major and vibrant industry in Mildura, generating more than \$210 million expenditure each year and underpinning around 2,100 full time jobs.

Mildura's setting - on the banks of the Murray River while being flanked by impressive natural surrounds and national parks - lends itself to the apt description of being where the Mediterranean meets the Outback.

An abundance of quality restaurants and eateries celebrate the magnitude of locally-grown produce while Mildura's reputation as a wine region is further enhanced by a growing number of cellar doors that are emerging among the ranks of nearly 40 wine producers.

Mildura boasts an exceptional sporting, cultural and arts scene with an impressive year-round calendar of highly reputable events directly matching the diversity of themes and interests that makes life in and around Mildura very liveable. Mildura was Australia's first irrigated colony, heritage proudly displayed along the Chaffey Trail which enables visitors to follow the 1880s vision of the Chaffey Brothers who transformed Mildura into an irrigated oasis in the midst of an arid land.

The Murray River provides a spectacular yet calming backdrop to everything that happens in Mildura; there's no better example than the junction of where Australia's two greatest rivers - the Murray and the Darling - occurs at Wentworth. Not surprisingly the luxury houseboat market, epitomizing floating indulgence, is one of the fastest growing and highest yielding segments of Mildura's tourism industry.

Also of growing significance are the region's surrounding national parks. Best known with its international reputation and indigenous significance is Mungo National Park, while the Perry Sandhills, Kings Billabong Reserve, Hattah-Kulkyne National Park and Murray Sunset National Park are among firm favourites with locals.

The conference and business events market is another growing segment within the local tourism industry. Currently Mildura hosts around 25 conferences a year, with strategic efforts aiming to double that within two years.

For the year ending Year Ended December 2008, Mildura attracted some 500,000 visitors (domestic, international and day trippers) to the region who spent 1.3 million visitor nights here. Domestic overnight travel represents our largest visitor sector. For the Year Ended December 2008 Mildura received 392,000 domestic overnight visitors, down 16% on the previous year. Domestic visitors spent nearly 1.3 million nights in the region, down 21% on the previous year. It is acknowledged that, around Australia, domestic tourism is generally flat or in decline. Mildura's domestic figures mirror those of similar regions within Victoria and around Australia. Other figures worth noting include the main purpose for domestic visits to the Mildura region and sources of origin of those visitors.

#### Mildura Tourism

PO Box 3103, Mildura Vic 3502  
 Telephone +61 (3) 5021 0599  
 Facsimile +61 (3) 5021 0599  
 Email admin@milduratourism.com.au  
 www.visitmildura.com.au

#### Mildura Visitor Information & Booking Centre

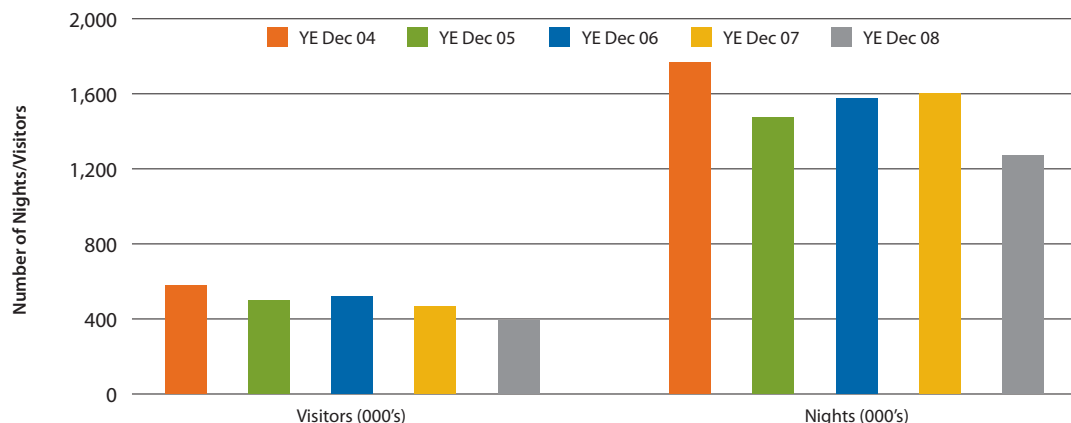
Cnr Deakin Ave and Twelfth St, Mildura Vic 3500  
 Open 9am - 5.30pm Monday to Friday and 9am - 5pm weekends and public holidays. Closed Christmas Day.  
 Telephone +61 (3) 5018 8380 or Freecall 1800 039 043 (within Australia)  
 Email tourism@mildura.vic.gov.au

#### Wentworth Visitor Centre

66 Darling St, Wentworth NSW 2648  
 Open 9am - 5pm Monday to Friday and 10am - 2pm weekends and public holidays.  
 Telephone +61 (3) 5027 3624  
 Email tourism@wentworth.nsw.gov.au  
 www.visitmildura.com.au

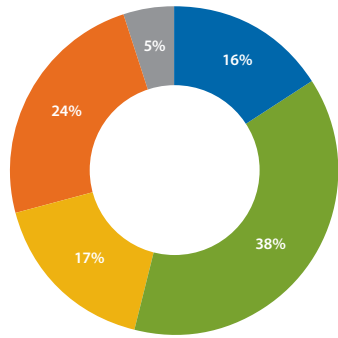
**Tourism generates \$210 million per annum in expenditure in the Mildura region.**

**Tourism Visitors and Nights, Year Ended December 2008**



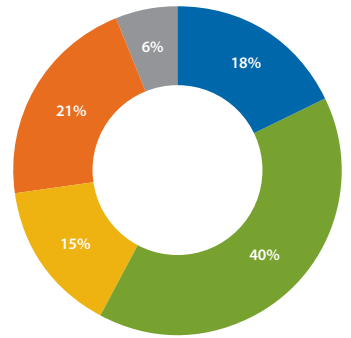
Source: AECgroup; Mildura Tourism, 2008

**Visitor Origin, Year Ended December 2008**



- Melbourne
- Regional Victoria
- New South Wales
- South Australia
- Other Interstate

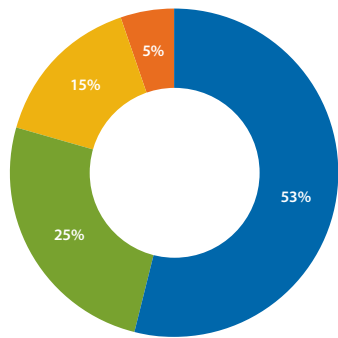
Visitors



Nights

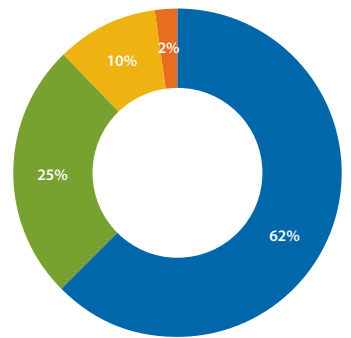
Source: AECgroup; Mildura Tourism, 2008

**Purpose of Trip, Year Ended December 2008**



- Holiday or Leisure
- Visiting Friends and Relatives (VFR)
- Business
- Other

Visitors



Nights

Source: AECgroup; Mildura Tourism, 2008



## Mining Resources

The Mildura region is fortunate to have mining resources that are starting to expand and further diversify the economy. The resources currently being extracted include:

- Mineral Sands
- Bentonite
- Salt

### Mineral Sands

The Murray Basin has an abundance of mineral sands resources and is seen as the next big mineral sands producing region in Australia. Mineral sands are made up of rutile, ilmenite, zircon and leucoxene and are processed and used in the production of the following:

- Pigment
- Paint and plastics
- Sunscreen
- Paper coating
- Toothpaste
- Aircraft and ship building
- Surgical implants such as artificial joints and pacemakers
- Foodstuffs
- Pharmaceuticals and cosmetics
- Sports equipment
- Ceramic glazes on tiles
- White goods and televisions
- Welding rods

*Iluka is focused on developing a regional workforce from Mildura and surrounding areas to enable it to access the significant mineral sands resources in north-western Victoria.*

**Suresh Vadnagra**

Mine Manager,

Murray Basin Stage 2

Iluka Resources Limited

### Iluka Resources Limited

Iluka Resources Limited is the world's largest producer of zircon and the second largest producer of titanium minerals and has annual sales in excess of \$1000 million. The Murray Basin Stage 2 Project comprises two areas of mineralisation:

- The Kulwin deposit about 28km east of Ouyen
- The combined deposits of Woorack, Rowack and Pirro about 20km south-east of Ouyen

The operational workforce for the Murray Basin Stage 2 Project will consist of approximately 160 people on site, some of whom will be housed within a self contained accommodation resort on the outskirts of Ouyen.

The Murray Basin Stage 2 Project is expected to produce approximately 2.4 million tonnes of dry, heavy mineral concentrate over 7 years with mining taking place 24 hours a day, 365 days a year.

[www.iluka.com](http://www.iluka.com)

### Bemax Resources Limited

Bemax Resources Limited (Bemax) has mining operations located in two significant mineral sands provinces in Australia namely, the Murray Basin and south west Western Australia.

In 2006, Bemax became the largest producer of Leucoxene, the third largest producer of Rutile and the seventh largest producer of Zircon, globally and became recognised as one of Australia's premier mineral sands miners.

In 2008, Cristal Australia Pty Ltd acquired all of the shares in Bemax via an off-market takeover bid and the company was removed from the official list of the Australian Stock Exchange.

Cristal Australia Pty Ltd is a wholly owned subsidiary of The National Titanium Dioxide Company Limited (Cristal). Cristal is a private company with headquarters in Jeddah, Kingdom of Saudi Arabia.

Regarded by the industry as a world class Zircon and Titanium mineral sands province, the future of Bemax and indeed the mineral sands industry in Australia, is in the Murray Basin. The implementation of Bemax's planned expansion of the Murray Basin operations is advancing well. Bemax has two significant deposits in the Murray Basin, Ginkgo and Snapper, both of which are located between Wentworth and Broken Hill. The current focus is the development of the Snapper mine.

The Ginkgo mine contains 5.8 million tonnes of heavy mineral, with an excellent suite of products including Zircon. The Snapper mine, which will be mined in conjunction with the Ginkgo mine, is an even richer mine containing an overall higher tonnage and greater percentages of both Rutile and Zircon. The Ginkgo mine is located 220km from Broken Hill.

The infrastructure at the Ginkgo mine is well established and includes a 124km (66kv) power line, 67 km of unsealed haulage road, readily available water supply, accommodation camp, communications as well as administration buildings.

Heavy mineral concentrate from the Ginkgo mine (and the Snapper mine once commissioned) is transported to the Broken Hill Mineral Separation Plant for processing.

[www.bemax.com.au](http://www.bemax.com.au)

## Bentonite

Bentonite is an absorbent clay which is naturally formed by the decomposition of volcanic ash and has swelling properties of 5 to 6 times its original volume in the presence of water.

Arumpo Bentonite Pty Ltd's deposit is the largest bentonite deposit in Australia. With indicated reserves in excess of 70 million tonnes, renowned for its purity, the deposit is located 95km north east of Mildura.

Arumpo bentonite is produced in a variety of sizes and grades to suit a wide range of applications including, but not limited to; pet litter, stockfeed additive, water storage sealing, civil engineering, electrical earthing aids, road making, geological barriers, drilling, farm dam sealing, absorbents, soil improvers and garden products.

Large weatherproof storage, processing and packing facilities in both Mildura and Buronga allow for consistent and regular supply of product all year round.

Arumpo Bentonite Pty Ltd has developed its world class bentonite deposit over the past 16 years and the shallow depth of the deposit allows for easy mining with minimal disturbance to the immediate environment. The company employs a workforce of 16.

[www.arumpobentonite.com.au](http://www.arumpobentonite.com.au)

## Salt Resources

SunSalt commenced salt harvesting in 1982 known then as Hattah Salt. The business originally began producing salt from the unlimited supply of underground saline water (twice as salty as seawater) at Spectacle Salt Lake - Hattah, Victoria, Australia.

In 1986 the company installed a refinery for drying, processing and packaging of salt products. To enable the business to grow successfully, further salt producing sites were identified at Mourquong basin and Wakool Mitigation Site 2.

In addition to the long term production of industrial, bulk and stockfeed salts, whose varied uses include tanning hides, metal recycling, cooking and baking, pickling and preserving, the dye industry, detergents, swimming pool chlorination, dust suppressants and stabilising of dirt roads - the company also produces a retail gourmet flake salt, Murray River Pink Salt. This gourmet, naturally pink finishing salt has won many prestigious awards and is enjoyed by food connoisseurs the world over.

[www.sunsalt.com.au](http://www.sunsalt.com.au)

## Transport, Logistics and Warehousing

As mentioned earlier, with a growing population and economy, it is no surprise that the transport and logistics sectors is doing well in the Mildura region. Supported by key road and rail infrastructure, it is easy to move products and people to anywhere in Australia. Currently, it is estimated that 2,431 people work in this field.

The Mildura Region Transport and Logistics Cluster (MRTaLC) was established in 2007, through joint funding from the Department of Innovation Industry and Regional Development Regional Innovation Clusters Program; Office of Training and Tertiary Education initiative funding through Sunraysia Institute of TAFE; support from the Sunraysia Mallee Economic Development Board (now Mildura Development Corporation Inc.); Mildura Rural City Council; and local industry.

The Cluster has been established to be an action group, focusing on the concerns of the Transport and Logistics industry within the Mildura region, to research and develop strategies and initiatives that can be implemented to resolve those issues.

*Being ideally situated between capital cities, having a locally based high class freight distribution network, and its close proximity to the bentonite deposit, makes Mildura the perfect location for Arumpo Bentonite Pty Ltd and enables the company to offer reliable national delivery to its entire customer base.*

Lloyd Thomson  
Managing Director,  
Arumpo Bentonite Pty Ltd

*There are over 237 transport and storage companies in the Mildura region employing around 2,431 people.*

The Cluster has identified following areas of focus for the group:

- **CROSS BORDER ANOMALIES** Working with key bodies in an effort to streamline state regulations for the Heavy Vehicle Industry
- **INFRASTRUCTURE** Working with local and state governments to identify, prioritise and develop appropriate Heavy Vehicle access infrastructure.
- **SKILLS SHORTAGES** Developing strategies to fill existing and future needs for skilled labour.
- **INDUSTRY IMAGE** Promoting a positive image of the Transport profession to the community.

This is a new Cluster being the first of its kind and reflects the importance of transport within this growing tri-state region of Australia.

The Cluster believes that Mildura is in a key strategic position to develop into a national Transport and Logistics hub. To achieve this, collaboration with and within industry is essential as is the joint partnerships of local, state and federal government and the transport and logistics sector.

There are over 237 transport and storage companies in the Mildura region, some of the largest transport operators include Pickering Transport Group, Piscioneri Transport Services, Wakefield Transport and GTS Freight Management. GTS Freight Management is a privately owned transport company based in Mildura. Established in 1982, its core focus has been the provision of integrated transport and logistics services to the Australian wine and beverage industry. Servicing the eastern seaboard, GTS' infrastructure and equipment is extensive with 112 b-double prime movers complimented by 280 curtain side trailers. GTS' transport division is complimented by over 21,000 square metres of insulated warehousing, with another 8,000 square metres of non-insulated warehousing also available.

GTS Freight Management employs over 215 people (as well as additional labour hire as required) locally and elsewhere on the eastern seaboard. The majority of those employed outside the region are drivers located in strategic geographical locations that compliment the workload, contracts and growth opportunities.

Productivity in a linehaul transport company is primarily measured by kilometres travelled by the fleet as a whole as well as average kilometres travelled by each prime mover per working day. During 2008 the GTS fleet travelled in excess of 20 million kilometres, with average daily productivity per prime mover in the order of 800 kilometres.