

### Industry 4.0 Business & Investment Prospectus

Investing in the future of Loddon Mallee

January 2023

REGIONAL DEVELOPMENT VICTORIA

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#### Acknowledgement of Country

We acknowledge the Traditional Owners of the lands and waters on which we live and work, and pay our respects to their Elders past, present and emerging.

We acknowledge that the Loddon Mallee region is on traditional lands, including those lands of the First Peoples of the MillewaMallee (being Latji Latji, Ngintait and Nyeri Nyeri Traditional Owners), the Wurundjeri, Dja Dja Wurrung, Taungurung, Wotjobaluk, Jaadwa, Jadawadjali, Wergaia and Jupagalk Nations and Dja Dja Wurrung Yorta Yorta People, as well as other Traditional Owner groups in Victoria who are not formally recognised. We acknowledge the diversity of Aboriginal Victorians, their communities and cultures, the intrinsic connection to Country, the contribution and interest of Aboriginal people and organisations in developing a prosperous region.





### Foreword

Loddon Mallee's clusters of Industry 4.0 activity continue to attract global interest and investment.

Our regional business networks, knowledgesharing partnerships, and world-leading research institutions continue to support and nurture entrepreneurship throughout the region.

Loddon Mallee's emerging industries have long been a source of innovation, and we have seen firsthand the speed at which they have taken to and adopted Industry 4.0 concepts such as artificial intelligence and automation. These innovations will enhance local businesses, by making processes more efficient, unlocking export opportunities, but most importantly, by improving the experience of their customers, employees, or patients.

Loddon Mallee is uniquely positioned to benefit from the global trends which are shaping the economy, and we will continue to accelerate our growth through the uptake of new technologies and innovations.

#### Leonie Burrows

*Chair* Regional Development Australia Loddon Mallee











## Introduction

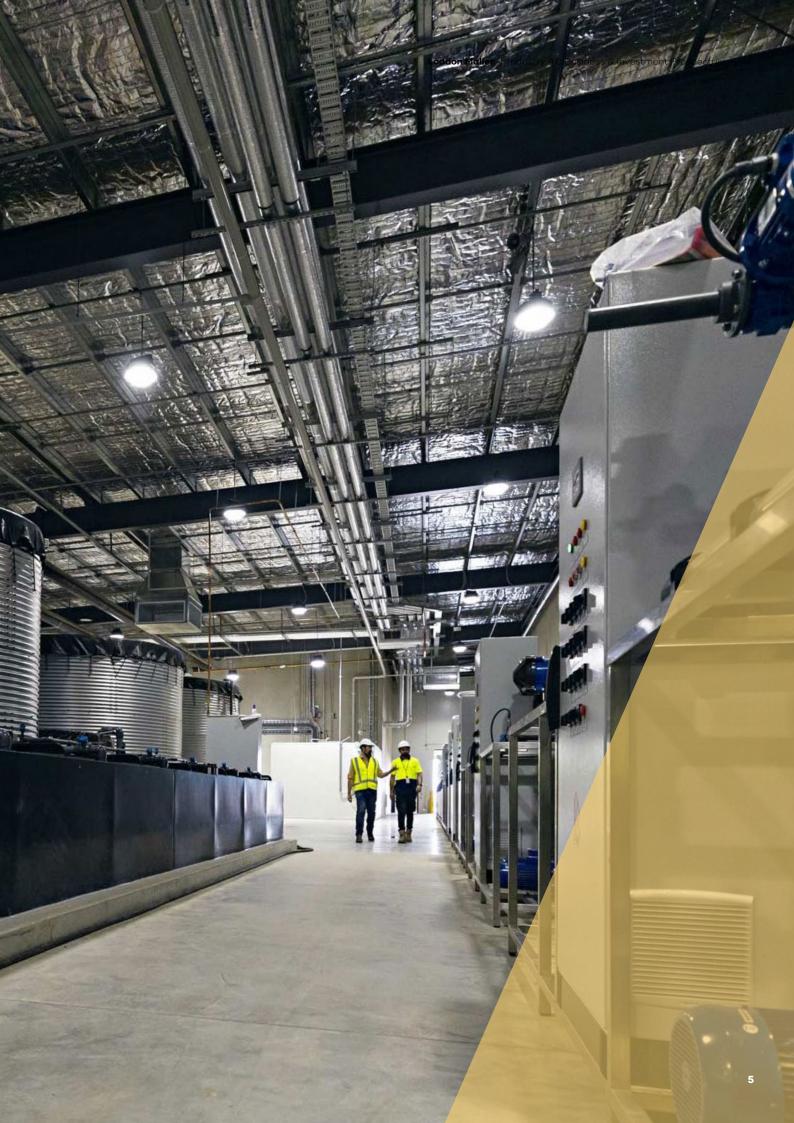
Loddon Mallee is investment ready and prepped for growth. As an Australian powerhouse of advanced manufacturing, technology-driven agriculture, and digital health, the global transition towards Industry 4.0 is well underway in Loddon Mallee.

The region's early-mover projects have already started to pay off, with existing clusters of smart technology and innovation providing a powerful springboard for future success. This Prospectus highlights some of the ways industries across Loddon Mallee have collaborated, adapted, and innovated to harness the opportunities presented by Industry 4.0. Beyond business, Loddon Mallee offers an enviable lifestyle, a variety of housing options, and worldclass research institutions providing those looking to relocate to the region with the means to flourish.

The advantages of Loddon Mallee are clear, with a space suitable for your needs available across the region.

Head to our key **Invest Loddon Mallee on-line portal** for information and support for your next venture.





## Why Loddon Mallee?

Loddon Mallee has a lot to offer potential investors. Its efforts to become an early leader in Industry 4.0 have, in turn, attracted skilled workers, and innovative businesses to the region.

Our unique advantages and ambitious targets continue to make Loddon Mallee an appealing place to live, work and study.



#### **Driving Regional Advantages**

Loddon Mallee's unique advantages make it an attractive region for entrepreneurs starting their next venture, or innovative business looking to expand their operations:

- Emerging renewable energy assets including Victoria's second largest solar farm, a hydrogen technology cluster, and the Murray River REZ
- Tri-state access for local industry with partnerships extending between Victoria, South Australia, and New South Wales
- Industrial land that is affordable and accessible to road, rail, and air freight along key transport and growth corridors
- Strong partnerships between industry and education institutions who collaborate and trial innovative technologies for real-world use
- Strategic links to global export markets including emerging east Asian economies
- World-leading research and education institutions offering clear career pathways for local graduates
- Extensive local heritage and a large variety of cultural, environmental and indigenous tourism businesses and experiences
- Areas of outstanding natural beauty and an unbeatable lifestyle making Loddon Mallee an appealing place to live, work, and study.



#### **Supporting Regional Ambitions**

Loddon Mallee has set ambitious targets to support emerging Industry 4.0 clusters in the region:

Improving digital connectivity

The City of Greater Bendigo is the southern powerhouse of Loddon Mallee. Through its 100gig initiative, the City offers businesses superfast internet connectivity – a key enabler of the fourth industrial revolution – and now aims to extend superfast connectivity into the broader region.

Developing Industry 4.0 excellence

Loddon Mallee plays host to several emerging networks of Industry 4.0 excellence. Key innovators such the Bendigo Regional Manufacturing Group, Coliban Water, La Trobe and Deakin Universities, the Mallee Regional Innovation Centre, and the Birchip Cropping Group offer important support to agriculture, mining, health, and manufacturing sectors as they look to gain business advantages through smart technology.

#### • Attracting workers

The Victorian Government's \$5 million investment in the Regional Workforce Pilots has boosted the availability of accommodation for seasonal workers in the Loddon Mallee's agricultural northwest. This follows substantial Victorian Government investment for worker accommodation facilities in Robinvale and Mildura enabling the continued rapid growth of business in these areas.



#### What is Industry 4.0?

Commonly referred to as the fourth industrial revolution, Industry 4.0 seeks to enhance conventional automation processes through the integration of cyber-physical systems.

Cyber-physical systems often operate autonomously, controlling industrial processes aided by sensor networks which collect, store and evaluate data.

Much like previous periods of industrial progress, businesses in Loddon Mallee are benefitting from innovations which drive efficiency and productivity.



### The ongoing Industry 4.0 revolution has typically revolved around 9 foundational pillars:



Nevertheless, definitions of Industry 4.0, and its constituent pillars, have adapted as regions make tangible advances with digital technology, data, and innovation to suit local requirements.

### **Driving Industry 4.0**

The transition to Industry 4.0 is a world-wide phenomenon. With a projected compound annual growth rate of 21% in the current decade, the global Industry 4.0 market will be worth over AUD \$400 billion by 2030.<sup>1</sup>

Loddon Mallee is well positioned to harness this global growth, strengthening its existing clusters of Industry 4.0 activity. The shift towards Industry 4.0 has already benefitted several important regional sectors including manufacturing, agriculture, healthcare, education, and the public sector (where the delivery of critical infrastructure and services will be increasingly aided through the use of digital technology, data, and innovation).

Loddon Mallee is at the vanguard of the transition to Industry 4.0. Across all sectors, its growth contributed approximately 4,000 jobs to the region in 2021<sup>2</sup>.

An analysis of 2021 job postings data showed that Industry 4.0 construction, resource extraction, IT, and engineering roles were in especially high demand. This demand no doubt reflects Loddon Mallee's growing construction sector, and its position as Victoria's preeminent mining region, historically possessing an intensity of mining jobs which is more than double the Victorian average.



### **Global Trends & Opportunities**

Countless megatrends have helped to drive Industry 4.0 innovation across the globe.

#### Inevitability

**GLOBAL TREND** 

*SPPORTUNITY* 

The advantages conferred on businesses who adopt Industry 4.0 concepts and technologies will ensure they become increasingly prevalent as organisations move to avoid falling behind their competitors.

The transition to Industry 4.0 can provide early mover advantages, allowing for the solidification of relative regional strengths.

#### Demand for Connectivity

Digital infrastructure is a key enabler of Industry 4.0 and ensures the exchange of data at ever increasing speeds and fidelity.

Through the upgrade of the city's data network, the 100 Gig Bendigo project demonstrates the region's commitment to provide business with worldleading connectivity.

#### **Demand for Skills**

The transition to Industry 4.0 has shifted expectations of the workforce as jobs are both created or made redundant by new technologies.

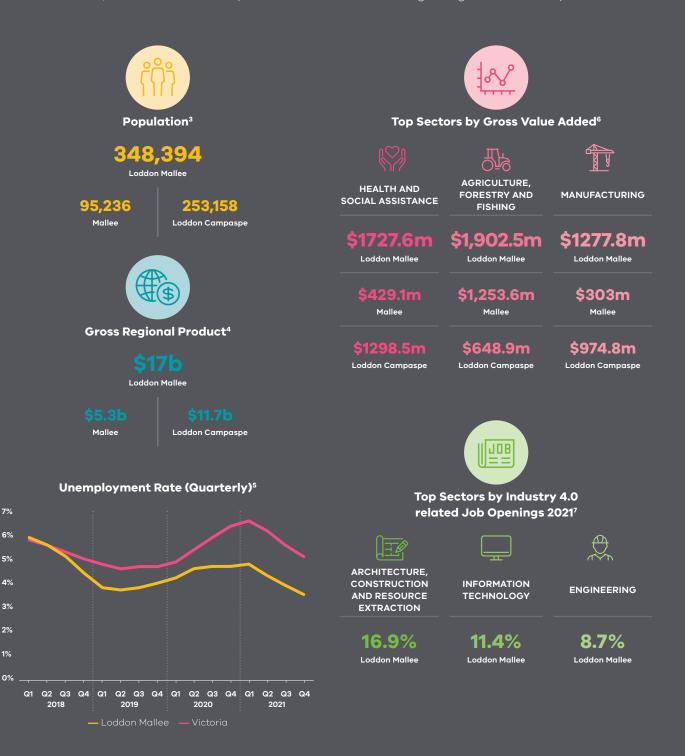
Loddon Mallee's world-leading research and education institutions will help to build the workforce of the future through qualifications that satisfy business demands.

1. Market Research Future, 2021

2. Delos Delta, Lightcast 2021

#### **Loddon Mallee by Numbers**

With existing strengths in advanced manufacturing, digital health care, smart farming, mining, amongst others, Loddon Mallee is well positioned to benefit from the global growth in Industry 4.0.



<sup>3.</sup> ABS 2021

4. RDV 2020

7. Delos Delta, Lightcast 2021

<sup>5.</sup> National Skills Commission. Small Area Labour Markets data agareaated by RDV - December Qtr 202

<sup>6.</sup> NIEIR 202

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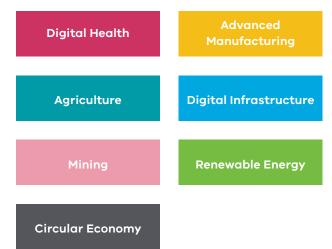
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### Industry 4.0 Clusters

Clusters of Industry 4.0 activity are areas which have already begun to exhibit a critical mass of skilled workers, pioneering businesses, and collaborative partnerships to become self-sustaining ecosystems of smart industry.

### Loddon Mallee's Existing and Emerging Industry 4.0 Clusters

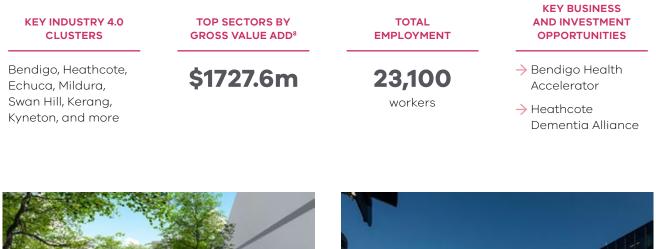


A sample of exciting projects and opportunities in Digital Health, Advanced Manufacturing, Agriculture, and Digital Infrastructure have been showcased in this Prospectus, although there exist several other or emerging clusters of Industry 4.0 activity including Mining, Renewable Energy, and the Circular Economy.

# **Digital Health**

The size of Loddon Mallee's Healthcare and Social Assistance sector creates ample opportunities for Industry 4.0 related investment. Industry 4.0 activity in Loddon Mallee disperses across a network of digital hospitals and innovative facilities connected throughout the region.

#### **Industry Profile**





Heathcote Dementia Alliance

In partnership with Care Villas Australia, Intelicare, and several industry partners and universities across Loddon Mallee, the Heathcote Dementia Alliance launched its Futures Hub to develop Industry 4.0 technologies to assist those living with dementia.

The Futures Hub is where innovation starts, and ideas and concepts are created enabling organisations to collaborate on the next generation of AI and assistive technology in digitally enabled health care. The Heathcote Dementia Alliance deploys these innovations through Care Villas Australia's living labs equipped with predictive behavioural learning software and integrated communications and alert systems.



**Bendigo Health Accelerator (BHx)** 

The first regional health accelerator in Victoria, BHx ran from June to October in 2020, providing early-stage health start-ups with access to Bendigo Hospital, a fully connected digital facility, as a living test environment for their innovation, product, or idea. As regional Victoria's largest hospital, Bendigo continues to facilitate Industry 4.0 innovation in healthcare and social assistance.

8. NIEIR, 2020

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**Bendigo Health IOMT Project** 

Bendigo Health's Internet of Medical Things pilot project represents Loddon Mallee's latest success in accelerating the use of Industry 4.0 technologies in the health sector. The project is the first step in developing an IoMT regional platform that could monitor the health of the elderly living in remote regional communities without direct clinical intervention, or the need for smartphones and internet access. By trialling various LoRaWAN and LTE networks, the project overcame blackspot connectivity challenges typically associated with the 4G mobile phone network technology currently used for remote patient monitoring and paves the way for new and innovative service models.

#### **Loddon Mallee Health Network**

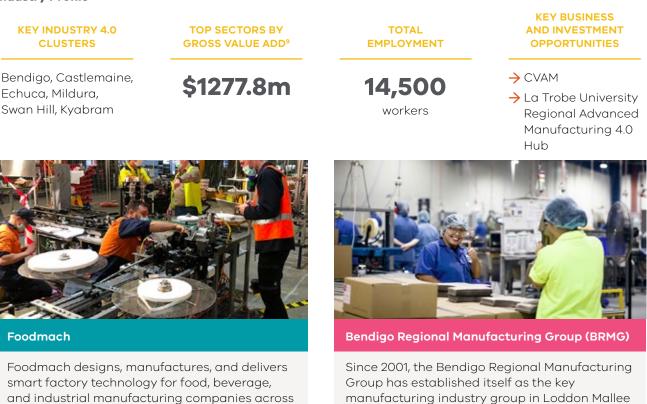
In a new approach for regional Victoria, the Loddon Mallee Health Network comprises over a dozen of the leading health facilities who drive digital healthcare outcomes in the region. The Network's 2022 – 2025 Telehealth Strategy outlines the group's ambition for integrating Industry 4.0 technologies and concepts including AI and IoT assisted remote patient monitoring, store-and-forward image and information transmission between healthcare providers, and the continued rollout of telehealth consultations to make use of increasingly capable internet and mobile connectivity across Loddon Mallee.

Bendigo Health acts as the lead agency for the Network, and, with its automated guided vehicles which collect and deliver food, linen and waste throughout the hospital, continues to champion and embed Industry 4.0 activity in healthcare settings.

### **Advanced Manufacturing**

Loddon Mallee's manufacturing legacy is long and secure. Advanced manufacturing clusters have developed across the region, especially in the innovation corridors supported by road, rail and air infrastructure.

#### **Industry Profile**



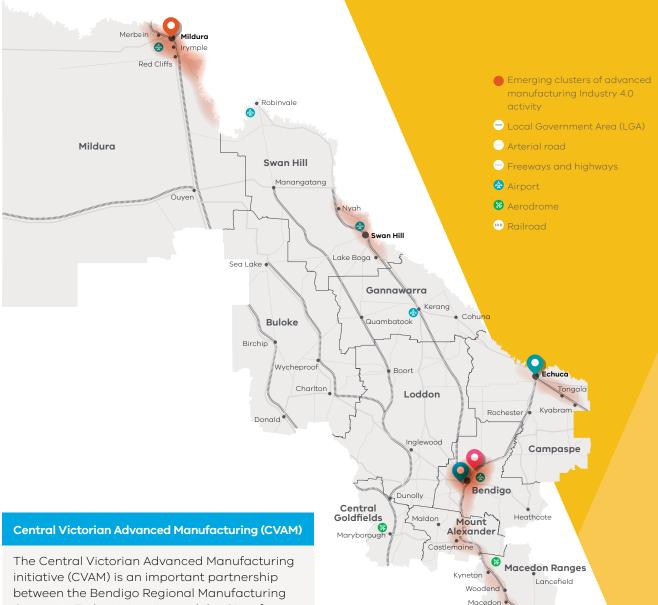
spearheading the growth of this critical sector

for the region.

smart factory technology for food, beverage, and industrial manufacturing companies across Australia. Its 5400m<sup>2</sup> factory in Echuca is a key driver of the Industry 4.0 revolution and provides valuable support to Loddon Mallee's advanced manufacturing sector.

#### Cann Group

With its abundant natural light, freight infrastructure, and reliable renewable energy, the Mallee proved an ideal location for the Cann Group's state-of-the-art closed system microclimate-controlled greenhouse facility in Mildura. The facility highlights the benefits of Industry 4.0 integration in agricultural manufacturing: The ongoing installation of automated conveyor systems will facilitate the rapid movement of cannabis plants throughout the \$120 million facility. Research partnerships also form a key component of the project. Facility connectivity via AARNET allows for seamless collaboration with research partners including AgVic, La Trobe University, and CSIRO. The current integration of Industry 4.0 technology such as hyperspectral imaging systems gives researchers real-time access to big datasets. These efforts have been supported by a \$5 million grant from the Australian Government to LaTrobe University, which simultaneously aims to build a cluster of skilled agricultural-technology workers in the regional hubs of Mildura and Swan Hill. The Mildura facility continues to leverage the world-leading bioinformatic capabilities of the La Trobe precinct AgriBio centre. Thanks to these innovations, the Mildura facility can be used as an industrial scale research facility.



between the Bendigo Regional Manufacturing Group, La Trobe University, and the City of Greater Bendigo to help develop advanced manufacturing capabilities in the region.

CVAM has been refining its model to support businesses digitally revamp their operating models and attract investment.

Backed by \$1 million of funding from the Victorian Government, CVAM has supported businesses across Loddon Mallee increase their global competitiveness by adopting Industry 4.0 technologies and concepts.

#### Australian Turntable Company (ATC)

CVAM collaborated with the ATC to undertake scientific research on the safety benefits of heavy vehicle turntables on construction and mining sites. This research has helped ATC market the benefits of its technology to local governments and businesses across Australia and internationally.



Gisborne

# Agriculture

Agriculture is an important sector for all 10 local government areas within of Loddon Mallee. The dispersion of agricultural Industry 4.0 activities across the Loddon Mallee has not stopped clusters of research and collaboration from developing in urban and rural areas where the sharing of innovative agricultural technologies and practices has become commonplace.

#### **Industry Profile**





#### Fieldin

Global Ag Tech and smart farm solutions provider Fieldin recently opened its Australian headquarters in Mildura, further cementing north-west Loddon Mallee's position as a cluster for Industry 4.0 agriculture.

Fieldin's machine-learning and AI driven agricultural operating system (AgOS) enables sensor-based connection between farm tractors and machinery, providing real-time data for local farmers.



Mallee Regional Innovation Centre (MRIC)

As a regionally significant partnership between the University of Melbourne, La Trobe University, and SuniTAFE, the Mallee Regional Innovation Centre spearheads Industry 4.0 research in horticulture as well as water, energy, and the environment. MRIC has advanced Loddon Mallee's Industry 4.0 maturity through its collaborative projects which include semiautomated grape pruning initiatives and the deployment of hyperspectral remote sensors to monitor water and nutrient stress in local orchards.

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#### Hazeldenes Chicken Farm

Based out of Lockwood, Hazeldene's continues to innovate in the Industry 4.0 space, using data and digital technology to support its decision making from the 'paddock to plate' including IoT sensors tracking animal welfare.

#### SuniTAFE

SuniTAFE's Mildura 'SMART farm' is training the next generation of farmers to integrate industry 4.0 concepts such as automation, robotics, and AI into agricultural practices. Students learn to use advanced technologies such as iMETOS, a system for modelling crop growth and monitoring insects, as well as Farmbot, an IoT enabled machine which can sow seeds, control weeds, and water crops.



**Birchip Cropping Group** 

The Birchip Cropping Group (BCG) drives agricultural innovation at the local level, providing solutions to a variety of farming problems in Loddon Mallee related to climate, plant nutrition, crop diseases, and new farming systems.

BCG have supported the development of several new agronomic technologies and farming practices, helping the region mature in the Industry 4.0 space. With over 400 members, BCG continues to help farmers across Loddon Mallee make informed decisions, develop risk management strategies, and use sustainable farming practices.

BCG is now seeking funding for its proposed NEXUS facility. NEXUS will bolster the Ag Tech driven Industry 4.0 cluster emerging in Loddon Mallee's northwest, by providing place-based learning and accommodation for emerging agricultural innovators and researchers.



ofi

Operating in over 60 countries, **ofi** has begun trials to operate automated fungicide sprayers at almond farms in Loddon Mallee's northwest. The trial was supported with a \$1 million investment in digital connectivity infrastructure and represents the group's commitment to the region.

**ofi's** advances in Industry 4.0 agribusiness build on its successful investment in a state-of-theart \$60 million almond hulling and processing plant which began operation in 2013. At 12,000 square metres, the processing plant, which operates laser sorter technology to enhance efficiency, is the largest of its kind in the southern hemisphere.

#### Agriculture Victoria's Support for Loddon Mallee

The 2030 Agricultural Strategy contains commitments to modernise the region's farms and to accelerate the transition to Industry 4.0.

- \$2.38 million of IoT grants for Loddon Mallee
- \$11.39 million for on-farm energy grants
- \$2.98 million for food to market grants
- \$3.2 million for small-scale and craft & AgriLinks grants

Agriculture Victoria's 'SmartFarms' in Mildura and Tatura have likewise helped to develop and demonstrate Industry 4.0 technologies across the region, helping to improve yields and increase the efficiency of local farms.

Connected to Agribio, the Centre for AgriBioscience in Bundoora, the Ag Vic SmartFarms in Loddon Mallee provide an invaluable connection to a world-class research and knowledge sharing network, and create a clear pathway for students looking to enter the agricultural sector in Loddon Mallee.



## **Digital Infrastructure**

Digital connectivity forms the foundation for Loddon Mallee's existing and emerging clusters of Industry 4.0 activity. The development of IoT networks across Loddon Mallee supports the region's inevitable and accelerating transition to new and smarter ways of working

#### **KEY INDUSTRY 4.0 CLUSTERS**

Bendigo to Gisborne rail corridor, VicTrack existing fibre assets, the Mallee IoT Network, Coliban Water's IoT Network

#### Digital Infrastructure in Loddon Mallee

In the Mallee, a joint partnership between four local governments, in collaboration with SuniTafe, La Trobe University, and Mildura Regional Development, established the first open and free IoT network with access and realtime data available to the community.

A total of 68 IoT access points were installed across the region, with the extensive network reaching from Mildura to Kerang, and from Murrayville to Ouyen along the Mallee Track.

In Loddon Campaspe, the partnership between Ventia and Coliban Water provides commercial grade connectivity across 52 sites from Kyneton to Kerang in the southeast of Loddon Mallee.

Ventia's LoRaWAN technology facilitates the connection of Coliban's smart devices across the region, providing real-time data from automatic meter-readers in the field.

Given the extensive coverage achieved by Coliban, Loddon Mallee's agriculture sector will benefit from the existing digital infrastructure, and knowledge, necessary to implement internet connected Industry 4.0 technologies in remote areas of primary production.

#### La Trobe University - Master of Internet of Things

With campuses in Mildura, Shepparton, and Bendigo, La Trobe University provides Loddon Mallee with a stream of talented graduates for expanding businesses. The recently launched and groundbreaking Master of IoT is already training the next generation of Industry 4.0 innovators to further strengthen the region's digital infrastructure. This is the only masters degree of its kind in Australia.



4G / 5G Enabled Infrastructure

Partnerships between the Victorian Government, Telstra, and businesses such as ofi, and the Fosterville Gold Mine, have seen rural areas of primary production become connected to the world with fibre and both 4G and 5G networks.

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## **Research, Skills & Partnerships**

Across Loddon Mallee, businesses looking to expand are supported by world-class research and education institutions developing and piloting the newest industry 4.0 concepts and technologies.

The partnerships between business and education are a key strength of the region, bolstered by the extensive network of industry and advocacy groups. The strength and success of these partnerships is reflected in the collaboration ecosystem below, representing the growing network of innovators, entrepreneurs, industry groups, and research bodies, who have collaborated on some of Australia's most exciting Industry 4.0 projects in Loddon Mallee.

#### **Collaboration Ecosystem**

#### Advanced Manufacturing

The Central Victorian Advanced Manufacturing initiative (CVAM) has been refining its model to support businesses digitally revamp their operating models and attract investment.

CVAM is a key regional partnership between the Bendigo Regional Manufacturing Group, La Trobe University, and the City of Greater Bendigo.

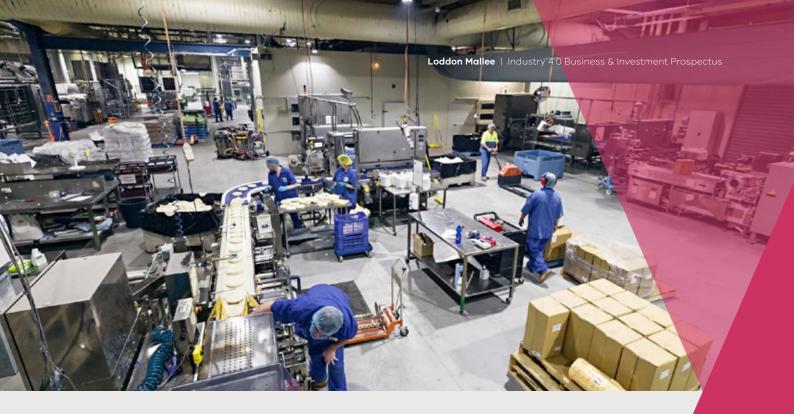
La Trobe's University's Regional Advanced Manufacturing 4.0 Hub in Bendigo represents a significant step for regional innovation. The Hub builds links between manufacturers, academics, and technology companies, providing greater access to global markets for regional manufacturers supporting Industry 4.0 related jobs. The project has the potential to grow well beyond Bendigo, including La Trobe's other regional campuses in Victoria.

Deakin University's successful ManuFutures2 program is coming to Loddon Mallee to strengthen existing partnerships with industry by developing pathways for skilled graduates into the local manufacturing sector. Loddon Mallee hosts countless institutions dedicated to developing the next generation of Industry 4.0 talent, as well as supporting local entrepreneurship and innovation. Key players include:

- La Trobe University
- The University of Melbourne
- Deakin University
- Monash University
- Swinbourne University
- Bendigo Tech School
- BendigoTAFE and SuniTAF
- Birchip Cropping Group
- Mallee Sustainable Farming
- And a range of industry specific bodies e.g. Murray Valley Winegrowers, Australian Table Grape Association, Mildura Regional Development Corporation

#### Agriculture and Energy

The Mallee Regional Innovation Centre (MRIC) coordinates research between the University of Melbourne, La Trobe University, and the Mallee based SuniTAFE, fostering collaboration and innovation to address regional challenges in 4 key areas - horticulture, water, energy, and the environment.



#### **Digital Health**

Supported by the IoT expertise of Loddon Mallee's world-class research institutions, Bendigo Health and the wider Loddon Mallee Health Network continue to develop innovative virtual care models, including using the Internet of Medical Things. Bendigo Health's real-time digitally enabled facility through our Regional Health Innovation Hub can also provide a living laboratory for digital health collaborations utilising industry 4.0 technologies, data and artificial intelligence.

In Heathcote, the local Dementia Alliance has collaborated with experts from Swinbourne and La Trobe Universities, and the University of Melbourne to use Industry 4.0 technologies to assist those living with dementia.

## **Regional Liveability & Tourism**

Investing in Loddon Mallee is more than a great business opportunity. The region provides an unbeatable lifestyle, with experiences for school leavers, retirees, and whole families to enjoy.



#### Festivals, Celebrations, and Innovation Showcases

- Bendigo Invention + Innovation Festival
- Mildura Country Music Festival
- Australian Alternative Varieties Wine Show
- Murray River International Music Festival
- Swan Hill Region Food and Wine Festival



#### Natural Wonders

- Hanging Rock
- Murray River
- Lake Tyrrell
- National and State Parks (Big Desert Wilderness Park, Wyperfield, Murray – Sunset, Hattah-Kulkyne, Terrick Terrick, Greater Bendigo, Leaghur, Kooyoora, and Paddys Ranges



#### A Highly Connected Region

As the busiest regional airport in Victoria, Mildura Airport, alongside the equally important Bendigo Airport, connect Loddon Mallee with business centres across Australia. The airports complement an effective rail service (which includes 28 trains a day from Bendigo to Melbourne, and the recent construction of 3 new stations on this to service this important rail corridor).



#### Bendigo

 UNESCO City of Gastronomy – recognised for its agricultural produce, creative and cultural industries, and variety of world-class restaurants

- Emporium Creative Hub in partnership with the Australian Centre for the Moving Image (ACMI) providing vibrant coworking spaces, mentoring and workshops
- Bendigo Art Gallery Australia's most successful regional gallery



#### **Nature Trail Destination of Choice**

Where interstate travellers come to enjoy a variety of hikes including the Goldfields Track, Murray River Adventure Trail, Lake Tyrell, Pioneer Settlement, and the Echucha Winery Loop.

Mildura's cross-border location means the city is the gateway to the World Heritage Mungo National Park in neighbouring New South Wales.

### **Next Steps**

This Prospectus has provided a glimpse of the Industry 4.0 opportunities available to investors, entrepreneurs, or those looking to live, work and study in Loddon Mallee.

If you have a project, pilot, or demonstration, or for more detail on any of the opportunities in this Prospectus, please get in touch with RDA Loddon Mallee or the organisations below.

- Health and Social Assistance Bendigo Health, Bendigo Health Accelerator, Heathcote Dementia Alliance
- Education and Training BCG, SuniTAFE, BendigoTAFE, La Trobe University Industry 4 Hub and IOT Masters Program, Bendigo Tech School
- Agriculture Ag Vic Grants, BCG Nexus
- Mining Gold and rare earth mineral exploration opportunities, METS Export Hub
- Renewable Energy
  Mallee Hydrogen Technology Cluster, VicGrid
  Murray River Renewable Energy Zone

Follow this QR code for up to date information about the latest investment opportunities in Loddon Mallee.



To find out more about RDA Loddon Mallee, or any of the business and investment opportunities contained in this Prospectus, contact us: rda.loddonmallee@rdv.vic.gov.au





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