SOUTH EAST QUEENSLAND

# Food System Strategy

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This report builds on Food System Horizon's goal of helping Australians understand the food system, their roles in it, and who they need to work with to develop a more sustainable, resilient, nutritious and equitable food system through science-based approaches. It recognises that there are diverse roles and responsibilities shared across the food system, and that place-based approaches provide a real opportunity for understanding and action.

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- Foodbank Queensland
- Food Connect Foundation
- Future Wild
- Griffith University
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- Healthy Land & Water
- Just Meat Protein
- Liveris Academy
- Lockyer Valley Foods
- Mott MacDonald
- Savour and Salt
- Queensland Department of Natural Resources and Mines, Manufacturing and Regional and Rural Development (DNRMMRRD)
- Queensland Department of Trade, Employment and Training
- Queensland Department of Primary Industries
- Queensland Department of State Development, Infrastructure and Planning
- Queensland Fruit and Vegetable Growers (QFVG)
- Resilient Rivers SEQ
- Slow Food Noosa
- Sunshine Coast University
- The Nature Conservancy
- The University of Queensland
- Three Little Birds Events
- Today News Group
- Toowoomba Surat Basin Enterprise (TSBE)
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# FOREWORD

Australia's food security depends on the strength and resilience of its key food-producing regions—our national food "bowls"—which grow, process and distribute the safe, nutritious food that sustains our communities. While Australia exports a significant share of what we produce, we also rely on imports to meet our diverse and evolving food needs.

South East Queensland is one of the nation's most important food-growing regions. It supports a rapidly growing and culturally diverse population and is preparing to welcome global visitors as host of major international sporting events. In this context, the leadership shown by members of CoMSEQ in seeking a clearer understanding of the region's food security challenges and opportunities is both timely and nationally significant.

This report marks an important first step, delivered through a collaborative research partnership between CSIRO and CoMSEQ. It highlights emerging issues, identifies gaps in current knowledge, and outlines key recommendations to guide future action. Strengthening food security in SEQ will require ongoing analysis, collaboration, investment and strategic planning—but this work lays a strong foundation for building a more resilient and sustainable regional food system.

## LARELLE MCMILLAN

**CSIRO Agri-food system**
**Program of Research Director**

South East Queensland has always been defined by its people, its landscapes, and its remarkable capacity to grow, create and innovate.

As our region continues to expand, we have both an opportunity and a responsibility to ensure our food system remains strong, sustainable and ready to support a rapidly increasing population.

SEQ is home to some of Australia's most productive agricultural land and world class producers. These industries support tens of thousands of jobs and contribute billions to our economy, but they are facing increasing pressure from severe weather events, water security challenges, supply chain vulnerabilities and a population expected to reach six million by 2046.

Developed in partnership with CSIRO and informed by councils, communities and organisations across SEQ, the region's first SEQ Food System Strategy identifies the priorities and challenges we must address to strengthen resilience, sustainability and long term food security.

We extend our thanks to all partners, individuals and organisations who have contributed time, knowledge and support to this work.

This shared commitment will ensure South East Queensland is ready to meet growing demand and showcase the rest of our region on the global stage in 2032 and beyond.

## BRISBANE LORD MAYOR ADRIAN SCHRINNER

**Chair, Council of Mayors South East Queensland**

# ACRONYMS

| | |
|---|---|
| **ABARES** | Australian Bureau of Agricultural and Resource Economics and Sciences |
| **ABS** | Australian Bureau of Statistics |
| **ACCC** | Australian Competition and Consumer Commission |
| **AUD** | Australian Dollars |
| **CPI** | Consumer Price Index |
| **CoMSEQ** | Council of Mayors South East Queensland |
| **CSIRO** | Commonwealth Scientific and Industrial Research Organisation |
| **DAFF** | Department of Agriculture, Fisheries and Forestry (Australian Government) |
| **DPI** | Department of Primary Industries (Queensland Government) |
| **FAN** | Food and Agribusiness Network |
| **FLW** | Food loss and waste |
| **FoodIQ** | Food Insights Questionnaire |
| **GRP** | Gross regional product |
| **GVAP** | Gross value of agricultural production |
| **ICIP** | Indigenous Cultural and Intellectual Property |
| **IOC** | International Olympic Committee |
| **LGA** | Local government area |
| **NHVR** | National Heavy Vehicle Regulator |
| **NRM** | Natural resource management |
| **NIAA** | National Indigenous Australians Agency |
| **PALM** | Pacific Australia Labour Mobility |
| **PBS** | Performance based standard |
| **R&D** | Research and development |
| **SEQ** | South East Queensland |
| **TraNSIT** | Transport Network Strategic Investment Tool |

# EXECUTIVE SUMMARY

This Strategy brings together diverse evidence and perspectives to identify the levers needed to better connect and support the South East Queensland (SEQ) food system's varied components. It seeks to broaden how food value is understood, moving beyond narrow market metrics to include multiple values for land and seascapes, cultural identity, and community connection. It also highlights the need for greater awareness among planners and decision makers of food's foundational role in regional economies, identities, liveability and health. As this inaugural SEQ Food System Strategy begins to map the system and uncover its dynamics, risks, and dependencies, subsequent phases can deepen the integrated understanding of how food functions across the region's communities, landscapes, and industries.

This Strategy takes a practical, inclusive approach. It is not a plan for a plan, nor a critique from the sidelines. Instead, it embraces inclusive innovation, recognising that solutions require creativity and contributions from producers, processors, manufacturers, distributors, consumers, community groups, governments, and investors. By elevating multiple local voices, the Strategy aims to create a shared narrative to inform recommended actions, rather than relying on a traditional top-down approach.

SEQ is emerging as an innovative food bowl—stretching from paddock to plate and extending through partnerships across Australia and the world. New ideas, technologies, and practices are taking shape throughout the region—some promising, some challenging—each influencing how food is grown, shared, and valued. Looking ahead, SEQ's future growth, major infrastructure developments, and the opportunities presented by the 2032 Olympic and Paralympic Games reinforce the need for a coordinated, data-driven, region-wide approach to food. Supporting innovation through new infrastructure, enabling businesses to scale, and embedding food considerations into land-use, economic, and development strategies will be essential. This Strategy lays the groundwork for a shared, resilient, and future-ready food system—one that reflects the region's unique values and ensures food remains central to SEQ's identity and prosperity.

# The Strategy

SEQ's food system spans all processes involved in producing, distributing and consuming food and ingredients.

This Strategy provides evidence-based insights into the SEQ food system which inform focus areas for government, industry, local and First Nation partners in integrating food into long-term and event-based strategies across the region.

# 1 A SOUTH EAST QUEENSLAND FOOD SYSTEM STRATEGY

## 1.1 A FOOD SYSTEM FOR SOUTH EAST QUEENSLAND'S FUTURE

South East Queensland (SEQ) is a successful and innovative food bowl. The region produces high-quality food that is value-added, distributed and consumed within the region, across Australia and around the world. Indeed, SEQ is responsible for close to 20% of the value of Queensland's agricultural production (Queensland Government, 2025a). However, SEQ's food system faces multiple pressures, including recurring climate disruptions, land use competition, supply chain infrastructure limitations, increased demand to showcase local food at mega sporting events such as the 2032 Olympic and Paralympic Games, and growing food security concerns. While there is considerable potential for further growth, these pressures threaten the region's ability to capitalise on its abundant strengths and resources.

In response, this SEQ Food System Strategy identifies key recommendations to build a productive and sustainable food system that supports the region's economic, cultural and social prosperity. To develop this Strategy, local councils, government agencies, and researchers began by constructing a robust evidence base describing the current state of the SEQ food system. This evidence was then used to identify practical actions to address key challenges and drivers influencing the system. A focus was placed on the production, processing, distribution and consumption of food in SEQ and how the two key drivers below present opportunities and challenges for a future sustainable food system *(Figure 1)*.

- **Mega sporting events** such as the 2032 Olympic and Paralympic Games present opportunities to build a sustainable and equitable food system.
- **Projected population growth** to around six million residents by 2046 brings increasing cultural diversity, including Aboriginal and Torres Strait Islander peoples and diverse communities, to SEQ.

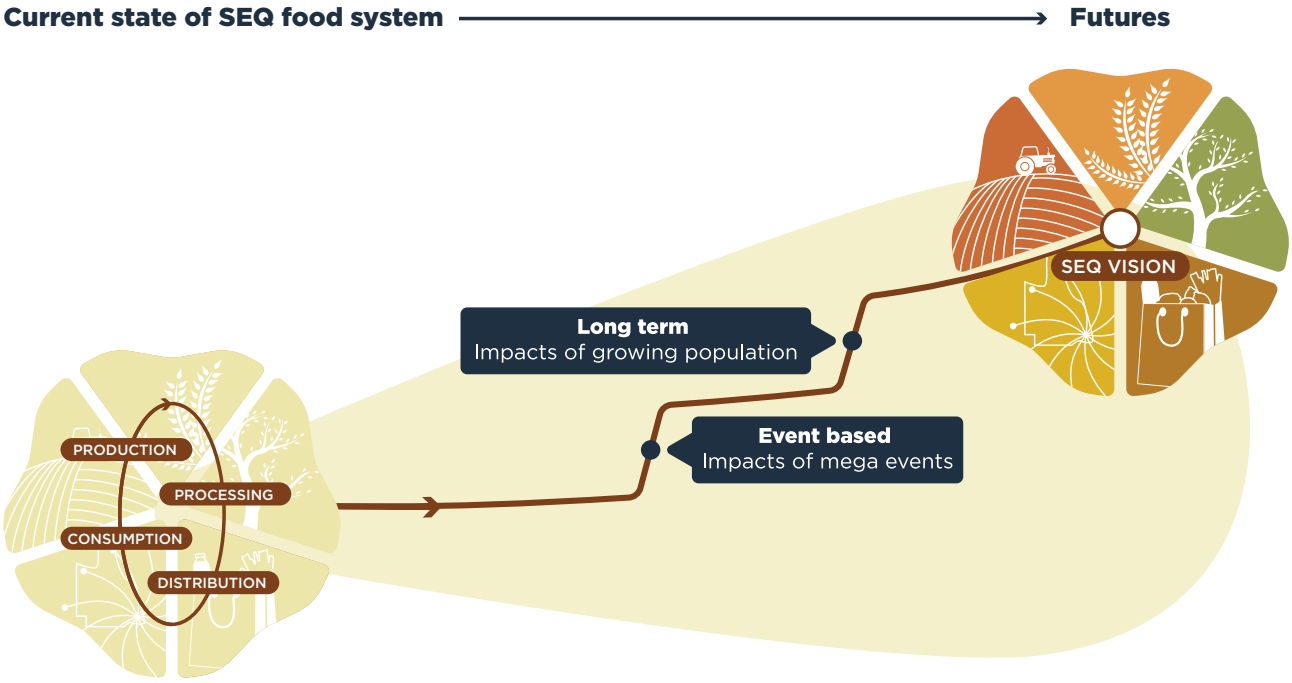



*Figure 1* **SEQ food system elements and drivers of change centred in this Strategy**

Drought, flood, waste, nutrition and health, biosecurity, and national and international food supply and demand drivers are also recognised as shaping the SEQ food system. However, time and resource constraints limited the extent to which these issues could be fully explored in this first strategy and should be addressed in future strategy updates.

This SEQ Food System Strategy outlines five key food system goals for the region and recommends areas to focus on in pursuit of these goals. The goals that underpin the Strategy are summarised in *Figure 2*.

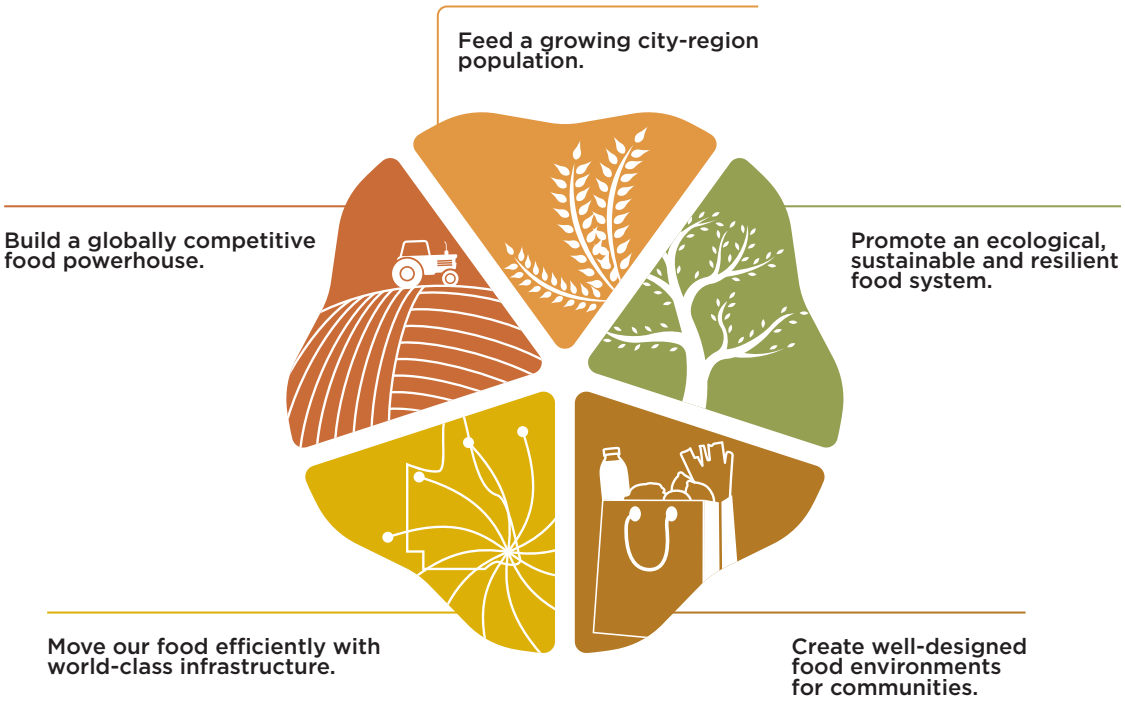



*Figure 2* **Five key food system goals for a future sustainable food system in SEQ**

These goals build on existing regional goals embedded in local government strategies and broader strategies that already affect the region's food system, including the following:

- **SEQ Regional Plan 2023.** This plan outlines the Queensland Government's long-term vision to accommodate future population growth in SEQ (Queensland Government, 2023a).
- **SEQ City Deal.** This $1.8 billion partnership between the Australian Government, Queensland Government and Council of Mayors (SEQ) provides targeted investment to support an export-competitive, knowledge-intensive region, offering a diverse range of local jobs (Commonwealth of Australia, 2022).
- **Queensland Primary Industries Prosper 2050.** This 25-year blueprint aims to empower Queensland's primary industries to be profitable, productive and sustainable for future generations, and is accompanied by regionally based action plans including for SEQ (DPI, 2025a).
- **South East Queensland Regional Drought Resilience Plan 2024-2030.** This includes three pillars for SEQ (planning and monitoring, response to drought events and building future resilience) and identifies the development of

a sustainable agriculture and food security strategy for SEQ as a priority activity (DPI, 2024).

- **Elevate 2042: Brisbane 2032 Games Legacy Strategy.** This focuses on the legacy of the Brisbane 2032 Olympic and Paralympic Games (Department of Tourism and Sport, 2023).
- **National Sport Strategy 2024-2034.** This includes economy and environment priorities to harness potential trade, investment, and employment opportunities from large sporting events (Department of Health and Aged Care, 2024).
- **Draft Queensland Waste Strategy.** A key framework for reducing waste, boosting Queensland's recovery rates and stimulating economic growth (DETSI, 2025).
- **SEQ Waste Management Plan.** A partnership with SEQ Councils and the Queensland Government to reduce reliance on landfill and increase resource recovery across the region (CoMSEQ, 2021).
- **Other strategies and plans.** These include (but are not limited to) regional transport and infrastructure plans, natural resource management plans, and local government economic development strategies.

Food values and priorities in SEQ broadly align with those seen across Australia *(Figure 3)*, reflecting shared national commitments to resilience, sustainability, equity and regional prosperity. However, the diverse and distinctive food cultures, landscapes and industries that make up SEQ's food bowl mean that the region also holds its own unique set of food goals. This highlights the need to recognise and balance a wide range of sometimes competing values, including: economic prosperity, local identity, cultural food needs, ecological stewardship, protecting prime agricultural land, community wellbeing, and regional self-sufficiency.

Benchmarking across Australia's food bowls would help highlight distinctive strengths, challenges and opportunities within and across Australian regions.

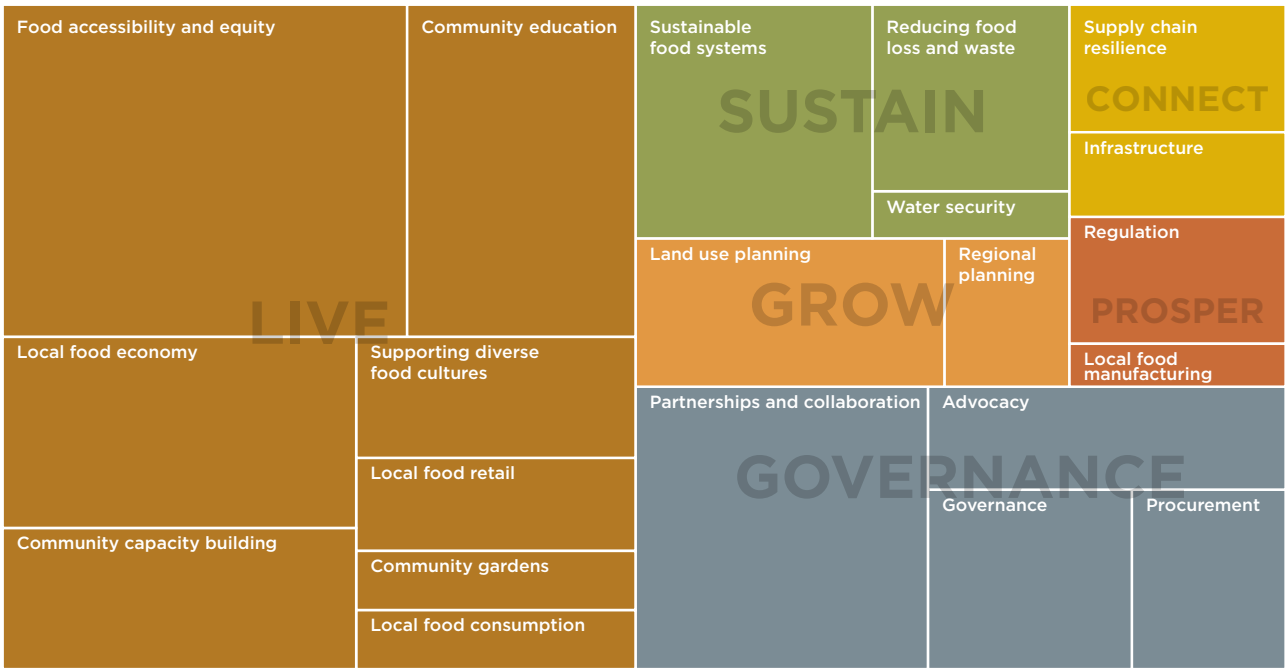



*Figure 3* **Diverse food values and priorities in food system plans across Australia, aligned with the five themes from 2023 SEQ Regional Plan. Refer to 6.4 Data sources and analytical methods for a list of plans analysed.**

As SEQ continues to grow, diverse values must guide land use choices, investment in food production and supply chains, and long-term planning decisions. The region's unique combination of subtropical growing conditions, multicultural communities, world-class tourism, and rapidly expanding urban areas creates both pressures and opportunities. Understanding and integrating localised food values will enable more responsive, context-based decision-making, ensuring that investment reflects what matters most to SEQ communities, while still aligning with broader Australian food system aspirations.

### 1.1.1 DEVELOPMENT OF THE STRATEGY

The SEQ Food System Strategy's goals and recommended actions were co-designed through co-production methods supported by a partnership between CSIRO and the Council of Mayors South East Queensland (CoMSEQ; *Figure 4*). Over 200 people representing industry, grower, community, Aboriginal and Torres Strait Islander, local government and agency groups participated in co-hosted events with Food Connect and the Food and Agribusiness Network; and two First Nation roundtables were conducted. Further details are provided in Chapter 6 of this report.

The SEQ Food System Strategy covers CoMSEQ local government areas (LGAs), including Brisbane


*Figure 4* **Forums and roundtables held across SEQ enabled diverse perspectives to inform this strategy**

City, Ipswich City, Lockyer Valley, Logan City, City of Moreton Bay, Noosa, Redland City, Scenic Rim, Somerset, Sunshine Coast, and Toowoomba. The Strategy recognises that SEQ also includes Gold Coast and spans a diversity of stakeholders who have different boundaries, characteristics and networks *(Figure 5)*. While this Strategy represents an important first step towards articulating the full depth and breadth of food system issues and properties within SEQ and the broader region, a comprehensive effort is needed to map the entirety of the food system, including from the perspectives of diverse groups.

While the key goals for the SEQ food system *(Figure 2)* received widespread input and support, the breadth of insights informing this Strategy reflects the diversity of perspectives across the system. In some areas, perspectives and the available evidence base will continue to evolve. The following agreed criteria guided this work:

- Suggest pragmatic recommendations that reflect SEQ food system values, strengthen system interactions and innovations, address key challenges, and leverage the unique context and characteristics of the SEQ food system.
- Adopt a multi evidence-informed approach, drawing on technical, planning, local and Aboriginal and Torres Strait Islander expertise to develop recommendations that support the sustainability of SEQ food ecosystems, communities and industries.

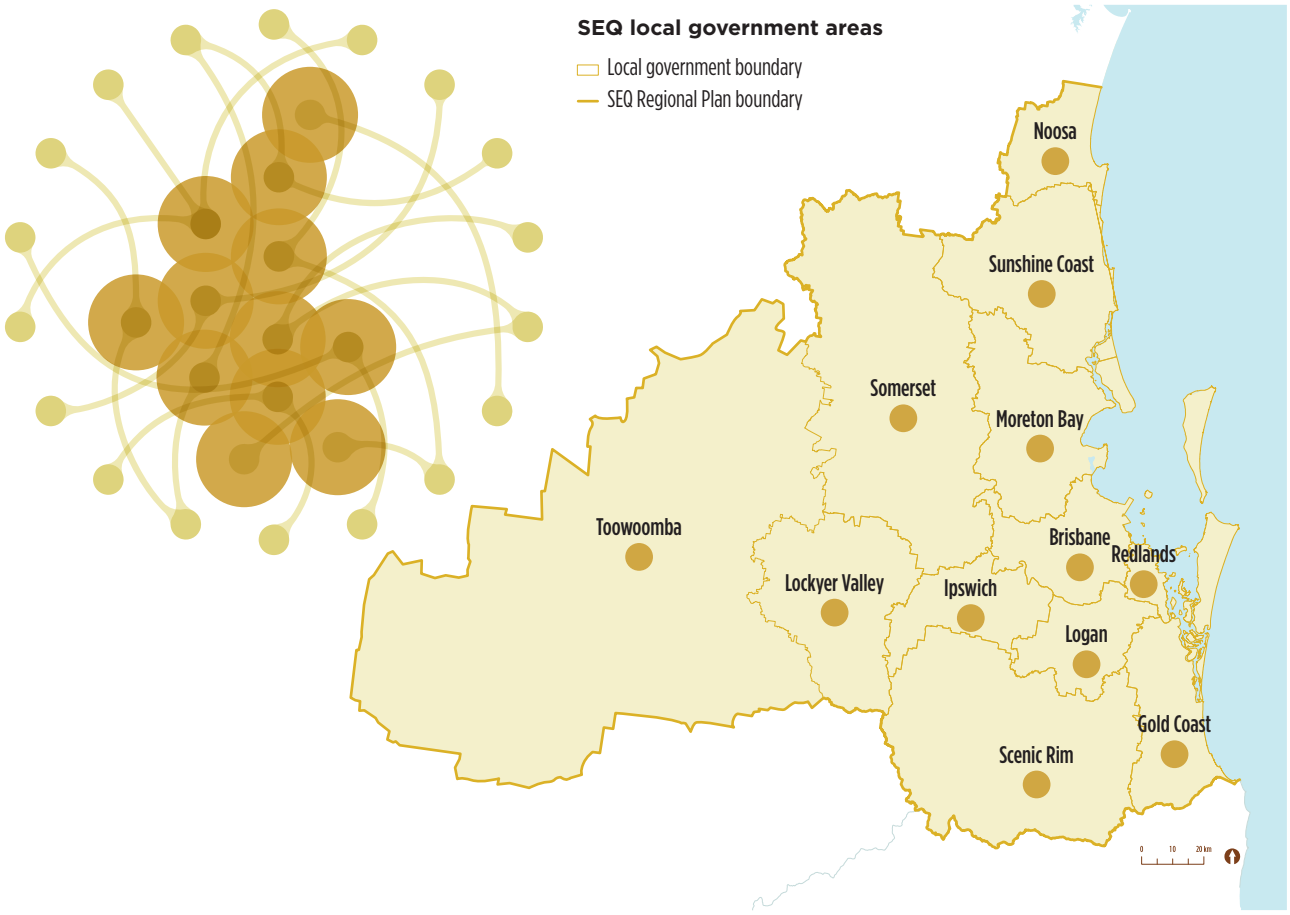



*Figure 5* **The Strategy recognises there are multiple interconnected local, regional, and broader food systems nested within and beyond the SEQ region**

To develop the Strategy itself, we adopted a systems-based approach to food. Food system management challenges in SEQ—and across many regions of Australia—are inherently complex. They arise from interactions among diverse stakeholders, resources and processes operating at multiple scales, and across social, economic, and environmental dimensions. The region's interconnected 'urban' and 'rural' food issues, coupled with the dynamic and often unpredictable nature of food systems, reinforce the need for a contextual and holistic approach across the food supply chain (see also Chapter 3).

Managing these systems is further complicated by constantly shifting conditions that rarely follow linear or predictable pathways. Differing perspectives on food system problems add additional ambiguity. Incomplete data or inability to access timely data also limit the ability to 'see' the whole food system, and resource constraints mean that prioritisation decisions are made to begin the process, rather than perfect it. A holistic approach recognises the interdependence of food production, processing, distribution and consumption, and draws on a wide evidence base—technical, local, industry and Indigenous knowledge—to identify and address critical gaps (cf. FAO, 2025; Nelson et al., 2025). Strengthening system-wide coordination also requires building stronger links between components that are currently disconnected or misaligned, such as land use planning for urban development, conservation priorities and agricultural production.

Our approach to addressing these challenges was guided by the Food and Agriculture Organization of the United Nations (FAO) systems approach to transforming food and agriculture. The FAO (2025) framework provided the foundation for this work and encompasses the following:

- **Systems thinking** – identifying strategic entry points and influencers for cross-sector governance to navigate tensions and opportunities across the food system.
- **Systems knowledge** – drawing on evidence from local, industry, council, Aboriginal and Torres Strait Islander, agency and technical sources, while highlighting gaps and identifying the knowledge needed to guide system transitions.
- **Systems governance** – strengthening coalitions and institutional mechanisms across sectors to protect and advance SEQ agrifood system goals.
- **Systems doing** – coordinating procurement, planning and implementation pathways that manage trade-offs and deliver multiple food related co-benefits.
- **Systems investment** – recognising the need for shared and reallocated investment across councils, agencies, industries, visitors, food system partners and landholders to sustain the SEQ food system.
- **Systems learning** – fostering co-learning within and between food system sectors to enable innovative and collective action.

While we applied systems approaches to guide this Strategy's recommendations, we recognise that SEQ's food system is already being shaped indirectly by multiple existing initiatives (see for example Chapter 2 for efforts within LGAs). This Strategy seeks to reflect the diversity of the region's food system, and the many perspectives and values present at local, regional, state, and national levels, enabling more aligned efforts to actively shape the system and achieve shared outcomes.

### 1.1.2 THE PURPOSE OF THIS STRATEGY AND STRUCTURE OF THE REPORT

This Strategy provides evidence-based insights into the SEQ food system which inform focus areas for governments, industry and local and Aboriginal and Torres Strait Islander partners to integrate food considerations into long-term and event-based risk and opportunity development strategies across the region.

The report has been structured so that the Strategy itself is presented as a standalone component.

Chapter 1 outlines the purpose, approach and the three interconnected focus areas that could guide actions towards a sustainable, resilient and future-ready food system in SEQ. The remainder of the report provides the evidence base for the Strategy, sharing insights from LGAs, SEQ-wide dynamics, the 2032 Olympic and Paralympic Games lead-up and legacy, and Aboriginal and Torres Strait Islander perspectives that informed the Strategy's focus areas and recommendations (Chapters 2, 3, 4 & 5). Recommendations and knowledge gaps used to inform Strategy focus areas are identified within the relevant Chapters. Information on data sources, methods, and references used for the report are provided in Chapter 6 and References.

## 1.2 KEY FOCUS AREAS AND PRIORITY ACTIONS

Key interconnected focus areas for the SEQ Food System Strategy are guided by the FAO systems approach to transforming food and agriculture. They draw on evidence presented throughout this report, as well as insights gathered through multiple roundtable and forum activities. They were refined in collaboration with CoMSEQ and the Queensland Department of Primary Industries (DPI) team.

The focus areas reflect shared responsibilities across sectors and levels of government and recognise the need for coordinated action to shape the future of SEQ's food system. They also highlight opportunities for targeted research and development (R&D) to support innovation, strengthen resilience, and enable long-term transformation. Achieving meaningful change will require a combination of voluntary and regulatory mechanisms—both within and beyond the influence of any single actor—including:

- Shifting behavioural norms (e.g., increasing consumer demand for sustainable agricultural products, fostering collaboration and knowledge-sharing).
- Regulatory requirements (e.g., product labelling standards, land use protections to prevent rezoning away from agriculture, shaping food environments).
- Voluntary standards and policies (e.g., procurement policies, third-party certifications).
- Agency and stakeholder interactions across SEQ system governance (including the goals and actions of multiple actors, agencies, businesses and groups).

As outlined in *Figure 1* and *Figure 2,* each focus area responds to identified challenges and leverages regional opportunities to meet SEQ food system goals. The following section set out the key focus areas and priority actions.

SOUTH EAST QUEENSLAND

# Food Systems Strategy

The SEQ Food System Strategy identifies three interconnected focus areas to guide action towards a sustainable, resilient and future-ready food system for SEQ. Together, these focus areas respond to population growth, climate and supply chain risks, and opportunities to strengthen regional value creation and food system coordination.

## 1 Strengthen a unique food bowl that supports a growing SEQ population

SAFEGUARD PRODUCTIVE CAPACITY WHILE MEETING THE NEEDS OF A LARGER AND MORE DIVERSE REGION

- **Know our food system** – Evidence-based region-wide food system planning
- **Protect productive capacity** – Safeguard agricultural resources and critical infrastructure
- **Ensure equitable food access** – Affordable, nutritious and culturally appropriate food for all

## 2 Feed mega sporting events

LEVERAGE THE LEAD-UP TO AND LEGACY OF THE 2032 OLYMPIC AND PARALYMPIC GAMES TO DELIVER LASTING REGIONAL FOOD SYSTEM BENEFITS

- **Leverage the 2032 Games** – Catalyse development of a sustainable and inclusive food system
- **Enable enduring local benefits** – Co-designed with local, multicultural and Indigenous groups
- **Showcase SEQ's food identity** – Distinctive, nutritious and culturally rich food supply

## 3 Grow an SEQ food innovation system

SUPPORT VALUE CREATION, RESILIENCE AND COMPETITIVENESS ACROSS THE FOOD SYSTEM

- **Harvest data innovation** – Integrate and use food system data effectively
- **Innovative value creation** – Leverage learning networks and circular economy solutions
- **Showcase Indigenous food knowledge** – Create food market and food security opportunities
- **Align food system values** – Harmonise food production, manufacturing and workforce strategies with changing consumer values

# STRENGTHEN A UNIQUE FOOD BOWL THAT SUPPORTS A GROWING POPULATION

Strengthening evidence-informed interactions across the SEQ food system—and responding to the biophysical, cultural and socio-economic drivers reshaping this unique food bowl—will safeguard productive capacity and support the needs of a growing and diverse population.

## Recommended priorities and actions

**Know our food system** – Evidence-based region-wide food system planning

- **Integrate food system planning.** Improve useful and reliable data and dynamic mapping of food production, processing, manufacturing, distribution, retail and consumption, prioritising improved preparedness to shocks (e.g., drought).
- **Track supply chain performance** by maintaining up-to-date and accessible mapping and indicators on production, processing, distribution, logistics, cold-chain capacity, input dependencies and system vulnerabilities to strengthen redundancy and resilience.

**Protect productive capacity** – Safeguard agricultural resources and critical infrastructure

- **Identify, update and manage priority food-system values** across industrial, urban, coastal and agricultural land to inform coordinated, evidence-based coastal and land-use decisions.
- **Improve and use labour data** to enhance the ability to manage workforce capacity, trends, and vulnerabilities across the agrifood system.

**Ensure equitable food access** – Affordable and nutritious food for all

- **Assess and strengthen food affordability, access and nutritional adequacy** for all SEQ residents, prioritising evidence-based actions for Aboriginal and Torres Strait Islander residents, low-income households, and culturally diverse communities.
- **Map local food environments** including availability, affordability, and accessibility of healthy and nutritious food in well-designed communities and tourism destinations.

# FEED MEGA SPORTING EVENTS

Position SEQ as a global leader in sustainable, inclusive and culturally rich food systems by leveraging mega sporting events, including the lead-up to and legacy of the Brisbane 2032 Olympic and Paralympic Games.

## Recommended priorities and actions

**Leverage the 2032 Games** – Catalyse development of a sustainable and inclusive food system

- **Integrate SEQ food system goals** into mega sporting event legacy performance measures, procurement processes and programs to strengthen local agri-food business participation and long-term capability building.
- **Assess mega sporting event food delivery,** specifically procurement, supply chains and food experiences—tracking environmental, economic, cultural and social co-benefits and demonstrating a measurable First Nation and local food legacy.

**Enable enduring regional benefits** – Co-designed with local, multicultural and Indigenous groups

- **Plan and coordinate a sustainable food system** across production, processing, distribution, consumption and waste management to guide SEQ's transition toward a low-emissions, circular and resilient food system.
- **Showcase the full breadth of SEQ's food** at mega sporting events by presenting diverse, authentic local, multicultural, nutritious and First Nation foods.
- **Establish a mega-sporting event regional food system monitoring and evaluation framework** to track lead up, event delivery and legacy outcomes.

**Showcase SEQ's food identity** – Distinctive, nutritious and culturally rich food

- **Expand multi market access and innovation pathways** for SEQ producers by strengthening capability, shared infrastructure and procurement accessibility for small, multicultural and First Nation food enterprises.
- **Build a lasting 'out of Games' food legacy for SEQ** by supporting supplier capability through compliance support, aggregation models and enhanced commercial networks.

# GROW AN SEQ FOOD INNOVATION SYSTEM

Support value creation, resilience and competitiveness across the SEQ food system. Position the region as a leading food innovation hub by expanding value creation, accelerating sustainable and circular production, strengthening digital and manufacturing capability, and deepening cross-sector collaboration across the SEQ food system.

## Recommended priorities and actions

**Harness data innovation** – Integrate and use food system data effectively

- **Strengthen digital capability and cross-sector collaboration** by expanding the use of AI-enabled analytics and interoperable data systems across all elements of the food system.
- **Develop region-wide digital platforms and data standards** to connect context-relevant food system data across production, logistics, retail and consumption.

**Innovative value creation** – Leverage learning networks and circular economy solutions

- **Expand sustainable food value creation** by supporting low-emissions and resource-efficient practices, and enabling value added processing aligned with shifting consumer and procurement trends.
- **Develop practical sustainability reporting and credentialing tools** tailored for SEQ enterprises to support participation in procurement programs, including mega sporting event markets.
- **Align food value-creation initiatives with tourism, export, and regional development strategies** to amplify economic and place-based benefits.
- **Invest in targeted regional food system learning and peer to peer exchange** using pilot projects and demonstration sites to test high-value, sustainable food products and production models.

**Utilise Indigenous food knowledge** – Create food market and food security opportunities

- **Embed Indigenous knowledge in food innovation,** ensuring culturally safe, appropriately governed approaches align with local priorities for economic development, cultural continuity, and food system stewardship.
- **Co-define measurable food objectives** with Aboriginal and Torres Strait Islander peoples and embed these in food security planning, procurement and investment processes.

**Align food system values** – Harmonise food production, manufacturing, and workforce strategies with changing societal values

- **Support the development and scaling of goods and services** that respond to growing demand for healthy, convenient, low emissions, culturally diverse, and high value foods.
- **Embed place-based workforce strategies** across the SEQ food system by supporting skills development and ensuring a responsive labour force across production, manufacturing, distribution, retail and food services.

# The Evidence Base

This Strategy draws on insights from technical, local, Indigenous, government and industry sources.

This collaborative process of sharing, testing and generating available evidence not only produced key insights but also revealed key knowledge gaps and partnership needs that need to be addressed to manage a sustainable SEQ food system.

# 2 LOCAL GOVERNMENT AREA INSIGHTS

AUTHORS: MAJA ARSIC, LILLY LIM-CAMACHO, CATHY ROBINSON, NIKKI DUMBRELL AND DAVID REYNOLDS

Place based perspectives in food systems highlight how local contexts, drivers, and pressures shape community realities. By recognising the diversity of environments and challenges, these approaches deepen understanding of how food systems function. Local initiatives and demonstrations provide insight into region specific dynamics, strengthening the relevance and nuance of food system knowledge.

This section features food system insights from the 11 CoMSEQ local government areas (LGA), presented in alphabetical order. They showcase the mosaic that make up what is SEQ's food system. Each insight is two pages, with the first page featuring a snapshot of the area's food system mapped against the five SEQ food system strategy goals *(Figure 2)*. The first page also summarises food system priorities, pressures faced, and opportunities available to the LGA. The second page highlights planning priorities for the food system and feature examples of initiatives that demonstrate the range of food system interventions that can be taken. Data sources and methods used to create these LGA insights can be found in Section 6.2 of this report.

# Brisbane

## Food System Priorities

- Business services and knowledge economy underpinning manufacturing and logistics
- Collaboration across the SEQ food system
- Understanding the SEQ food system's ESG readiness to support large events

## Pressures

- Population growth
- Land availability
- Cost of living
- Climate resilience and extreme events

## Opportunities

- Hosting major global events with opportunities to create a sustainable food legacy
- Becoming a leader in nature and agritourism
- Becoming an agrifood technology innovation hub

- Growing population from 1.36 million in 2024 to 1.6 million in 2046
- Highest proportion of people born overseas in SEQ (approx 32%)

- Accounts for around 7% of Queensland's gross value of agricultural production for intensive horticulture
- 10% of Brisbane's employment is associated with primary industries (including first-stage processing & food supply chains)
- More than 49,600 jobs across agri-food occupations in 2021

- 3% of Brisbane's land use is zoned as agricultural, mostly used for grazing and seasonal horticulture
- Resilience planning is in place for extreme events (e.g. floods) affecting food system connectivity

- The Brisbane Markets in Rocklea facilitate $1.3 billion in trade in fresh produce annually
- By 2041, the South-West Industrial Gateway precinct will contribute $6.5 billion to Brisbane's industrial GRP, serving as one of SEQ's major freight gateways
- Home to 10 university campuses, including The University of Queensland and Queensland University of Technology and Griffith University

- More than 49 community gardens and city farms are registered on the Brisbane City Council website
- There are farmers' markets across the city, including the Brisbane City Markets, Northey Street markets, and West End markets
- A wide range of festivals promote local produce (Good Food & Wine Show, Night Feast)

## State of the City 2025

**Brisbane's recent State of the City Report highlights competitive advantages that can be leveraged for the food system.**

- **Brisbane is globally recognised for advanced manufacturing, including robotics, biomedical technologies, food technology, and aerospace.**
- **The transport and logistics sector is expanding with strong export growth, particularly in agriculture and food manufacturing, supported by regions like the Scenic Rim and Lockyer Valley, key parts of Queensland's food bowl.**
- **The city's experience economy is thriving, with a growing reputation for food, events, and cultural experiences, and destinations like Howard Smith Wharves offering immersive hospitality beyond just food and drink.**

## SEQ Regional Plan 2023

**The SEQ Regional Plan prioritises strengthening regional economic clusters. Key industrial areas in SEQ include the South-West Industrial Corridor with the Health and Food Sciences Precinct at Coopers Plains, the Australia TradeCoast hub specialising in manufacturing, logistics, and food product manufacturing. These regions play a critical role in supporting advanced manufacturing and supply networks.**

## Brisbane Vision 2031

**Brisbane's 'Our Active, Healthy City' Priority has led to improved food safety through 15,000 audits of licensed food businesses, cutting foodborne illness by 48% and raising awareness of food hygiene standards by 76%. Residents are encouraged to make healthy and fresh food choices via community gardens and farmers' markets, with targets to ensure access to healthy and safe food choices and expand food-producing gardens in parks and community spaces.**

### Future Food Initiative

- Brisbane Economic Development Agency's Future Food Initiative offers entrepreneurs and established food and beverage companies a range of opportunities to attract investment and enter new markets through programs, workshops, and networks
- Initiatives include the Global Export Accelerator for expansion into Southeast Asia, the Future Food Annual Summit, and Exporting for Scale
- The initiative aims to support Brisbane businesses to expand nationally and globally

### Food Pilot Plant

- This scaled-down factory was built to simulate food and beverage manufacturing practices, with the aim of supporting manufacturing businesses to experiment and produce trial products under industrial conditions
- Scientists and staff support businesses from the ideation stage to production
- Facilities and equipment are available to support various treatments, manufacturing processes, and storage across scales

### Northey Street City Farm

- Northey Street City Farm is a nonprofit, community-based urban permaculture farm situated in central Brisbane
- Established in 1994, the farm has evolved into a local food source, educational facility, and tourist attraction
- The organisation is dedicated to promoting sustainability and adheres to the permaculture principles of earth care, people care, and fair share
- Key initiatives include the City Farm Nursery, weekly organic and upcycle markets, and a range of educational programs for adults and children

### Brisbane Food Trucks and Coffee Carts program

- Over 100 local and iconic locations across Council's road reserves, parks, sports grounds, and foreshore areas have been identified for food and coffee on the go, providing residents and visitors unique culinary experiences celebrating the city's dynamic outdoor culture
- Easy access for vendors to over 100 sites with one approval step
- Vendors easily connect with customers through the bnefoodtrucks website

# Ipswich

## Food System Priorities

- Food processing and manufacturing
- Supply chain connectivity between food bowls and urban populations

## Pressures

- One of the fastest growing populations in SEQ

## Opportunities

- Attracting investment, as land is available for food and beverage industry expansion (e.g., Suntory)
- Increase visitor spend, by leveraging food experiences as a complementary demand driver alongside events, business and leisure tourism
- Developing procurement policies to stimulate local food sourcing for council events
- Exploring food needs for specific populations (e.g., RAAF base with 5,000 people)

- Population doubling from 259,886 in 2024 to 529,064 in 2046
- More than 9,000 people moved to Ipswich in 2024-25
- Gross regional product reached $15.08 billion in 2024–25

- Generates $2.1 billion in food processing exports, accounting for 15% of total exports
- Gross value of agriculture production is $31 million, including:
  - livestock disposals ($22 million)
  - sweet corn ($2.2 million)
  - livestock products ($2.07 million)
  - nurseries and cut flowers ($3.83 million)

- Diverted 70,000 tonnes of food organics and garden organics waste from landfill to compost in 2025
- >90% of agricultural land (around 65,000 hectares) is used for grazing

- Road infrastructure is critical for transporting food from food bowls to urban centres
- Has a large commuting population, with around 50% commuting to Brisbane for work
- Public transport infrastructure is needed to support local employment and job site access
- Home to the University of Southern Queensland Ipswich campus

- Various annual, council-organised festivals and events provide opportunities to explore food tourism
- Food experiences are a key pillar within Ipswich's destination positioning, amplifying the value of local producers and hospitality businesses
- Market gardens are community-based but do not have a formal role in urban planning

## Ipswich Economic Development Strategy, 2023-2027

**People, Place, Prosperity and Partnerships are the four pillars of the 2023-2027 Ipswich Economic Development Strategy. These pillars have significant potential for co-benefits with Ipswich's food system.**

**People is about local job creation with the goal of increasing local employment opportunities to attract and retain talent in Ipswich.**

**Place is a focus on making Ipswich a destination of choice, with a goal of promoting liveability through the city's unique identity, characteristics, natural and built features.**

**Prosperity is about investment attraction and regional growth, building on Ipswich's competitive identity and developing the capacity of local tourism operators and businesses to deliver relevant, certified experiences with a focus on nature, heritage, culture and food experiences.**

**Partnerships is about being well connected and engaged, with a goal of building and strengthening partnerships with government, businesses and other key stakeholders in order to deliver a connected and thriving economy.**

## SEQ Regional Plan 2023

**Ipswich, alongside the Lockyer Valley, Scenic Rim, and Somerset regions, contains key rural lands used for horticulture, forestry, and grazing, forming one of Australia's most significant food bowls. These areas play a vital role in ensuring long-term food security and creating export opportunities. Measures will be taken to safeguard these land resources and associated processing infrastructure, preventing further land fragmentation and shielding rural industries and other supply chain activities from incompatible development.**

### Local Council Procurement Policy

- Ipswich City Council's Procurement Policy goes beyond a "local buy" element. There is a business location weighting, with preference given to businesses that are based in Ipswich, local areas, and Queensland
- Additional criteria have been included to determine whether the respondent is integrated into the local supply chain or provides local employment opportunities, engages with local apprenticeships or development opportunities, and demonstrates engagement and support for local community groups or activities

### Carol Park Industrial Estate

- Established industrial area for clustering food and beverage processing
- It includes a 28,250 $m^2$ lettable area within a 10-hectare site and is located 25 km from the Brisbane CBD and 37 km from Brisbane Airport
- It currently hosts large companies and has the potential to allow industrial symbiosis models to co-locate or value-add to products across businesses

### Suntory Oceania

- Suntory launched Suntory Oceania alongside its $400m Swanbank facility, a major new production hub in Ipswich with a 17-hectare footprint
- The site boosts local, sustainable beverage production, featuring smart automation, high-efficiency packaging and carbon-neutral design to serve Australia and New Zealand markets
- The facility provides advanced end-to-end manufacturing for 40 leading beverage brands

### JBS Australia

- JBS Australia at Dinmore provides thousands of jobs in Ipswich and surrounding areas, supporting local livelihoods and contributing significantly to the regional economy
- Since opening in 1986, JBS Dinmore has grown into Australia's largest beef processing facility through major capacity expansions, advanced automation, and over $100 million in infrastructure upgrades to boost efficiency, quality, and global competitiveness
- Originally operating a single shift, the plant now runs multiple shifts and employs over 1,800 people, following the introduction of a second shift in 2024 to meet rising global demand for beef

# Lockyer Valley

## Food System Priorities

- Agricultural production and boutique agritourism
- Retaining farming and supporting succession for future planning
- Unlocking agricultural innovation investment

## Pressures

- Water availability
- Climate risks and extreme events
- Access to labour
- Shifts away from food production depending on alternative crop prices
- Supply chain vulnerable to financial sustainability of key processing and packing facilities
- Accommodation availability for tourism and labour

## Opportunities

- Growing nature tourism and agritourism
- Engaging in cross-council collaboration to support industries and communities
- Deploying agricultural technology solutions
- Commitment to the Lockyer Valley & Somerset Water Security Scheme

- Growing population from 45,054 in 2024 to 57,354 in 2046
- 26% of employment is associated with primary industries (including first-stage processing & food supply chains)

- Gross value of agriculture production is $554.7 million, including:
  - vegetable production ($428.9 million)
  - fruits and nuts ($52.4 million)
  - livestock disposals ($30.1 million)
- Has 583 agribusinesses, with 43% turning over less than $50,000 annually

- Around 71% of land use is agricultural:
  - 86% is mostly used for grazing, followed by seasonal horticulture
  - 13%, the largest in SEQ
- One of two local government areas leading in pig production
- Water security is a priority to support food production, regional communities and industry opportunities

- Extreme events and labour shortages (harvest, transport) cause supply chain disruptions
- 53% of Lockyer Valley residents work in the Valley
- Home to the University of Queensland Gatton campus

- There are local food festivals and local Indigenous bushfood experiences

## Lockyer Valley Economic Development Strategy 2020-2026

**The Lockyer Valley Economic Development Strategy aims to strengthen the region's economy through targeted food system levers and strategic partnerships. Key actions include collaborating with partners to build a diverse, resilient, and connected business community with a strong emphasis on "Buy Local," and advocating for a sustainable water supply via the Lockyer Valley & Somerset Water Collaborative to support the diversification and long-term sustainability of agriculture and related industries.**

## SEQ Regional Plan 2023

**The Lockyer Valley's rural landscapes and vibrant towns are central to the region's success, forming part of South East Queensland's food bowl. This area not only supports significant agricultural production but also offers natural beauty, biodiversity, and tourism opportunities that enhance its economic and environmental value.**

**The Lockyer Valley is a key contributor to one of Australia's most important food bowls, with rural lands dedicated to horticulture, forestry, and grazing supporting long-term food security and export opportunities. Protecting this land and its processing infrastructure from fragmentation and incompatible uses is a priority.**

**Future plans aim to diversify rural activities, strengthen resilience to climate change, and maintain agricultural productivity. The Queensland Government will work with Lockyer Valley and other councils to secure sustainable water supply and ensure the region's economic sustainability, while encouraging boutique industries and agri-tourism that complement farming without compromising productivity.**

### Lockyer Valley and Somerset Water Collaborative

- This proposed water pipeline distribution network is designed to ensure long-term water security for agriculture sustainability, and to support regional economic growth in the Lockyer Valley and Somerset regions
- It received a $10 million investment from SEQ City Deal to support sustainable food production
- The initiative has the potential to:
  - more than double productive agricultural land from 9,000 hectares to almost 24,000 hectares
  - increase irrigation water by 50%
  - increase food production by $270M for Lockyer Valley and Somerset year-on-year
  - deliver a $175M annual increase in Queensland's Gross State Product
- Future industry opportunities

### Gatton Smart Farm

- $9M transformation of Gatton Research Facility into a world-class site for horticulture AgTech adoption, boosting food supply integration and productivity
- Climate-controlled glasshouses, retractable-roof cropping, and post-harvest labs for research on vegetables, berries, and tree crops
- On-farm trials and extension programs for producers, researchers, and tech companies to co-develop innovations and optimise supply chains

### Circular Fruit and Vegetable Processing Infrastructure

- A manufacturing startup has received development approval for a new facility
- The facility will use produce that does not meet supermarket standards and provide opportunities to minimise food loss and waste
- Infrastructure includes steel can production and canning; freezing, powdering, and juicing capabilities; pallet manufacturing from recycled plastics; and a bio-methane plant to use green waste for bioenergy

# Logan

## Food System Priorities

- Multicultural food capital
- Advanced manufacturing
- Supply chain connectivity

## Pressures

- Population growth
- Urbanisation
- Competition for land
- Climate risk and extreme events

## Opportunities

- Using industrial land for manufacturing businesses
- Leveraging a highly multicultural population with diverse food cultures
- Pursuing peri-urban agriculture opportunities for businesses and communities
- Building a collaborative stakeholder network that promotes Logan's capability, scales capacity, and accelerates cluster development
- Building export capability for Logan's food and beverage
- Promoting Logan's food and beverage capability, capacity, and cluster

- Growing population from 392,339 in 2024 to 539,874 in 2046
- Has one of the lowest median ages in SEQ (34.3 years)
- Has the largest net internal migration in SEQ – more than 7,000 people in 2024

- Manufacturing contributes more than $4 billion to the local economy
- 14% of people are employed in primary industries (including first-stage processing & food supply chains)
- 5% of Queensland's gross value of agriculture production for intensive horticulture is produced in Logan. This encompasses:
  - 121 agriculture businesses
  - 23,236 total primary industries and food supply chain jobs

- 33% of land use is zoned as agricultural, around 95% is mostly used for grazing
- Climate resilience and managing extreme events in flood-sensitive areas are priorities

- Home to four major fast-moving consumer goods distribution centres
- Located at the intersection of three major motorways and is close to both a food bowl and urban centres
- Home to the Griffith University Logan campus

- The Global Food Markets support local culinary tourism and diverse food cultures
- Supports urban design to incorporate local food production in communities
- Over 234 cultures and ethnicities providing opportunities for global flavours and local food tourism

## City of Logan: Queensland's Multicultural Food Capital (2020-2025)

**Logan is prioritising food tourism as a driver for economic growth and identity, while harnessing strengths from its culturally diverse community. The vision of becoming Queensland's Multicultural Food Capital will be achieved through:**

- **Leveraging Logan's locals to attract visiting friends and relatives,**
- **Capitalising on Logan's location to grow the number and value of day trip visitation,**
- **Increasing the focus on developing events and recreation activity.**

## Logan City Council's Urban Design Framework 2022

- **Integrate green assets into everyday life by increasing the use of land for edible landscapes, reducing demand for external food supplies.**
- **Encourage the development of community gardens and allotments within public spaces by exploring opportunities for community groups to lease and manage green areas and assets.**
- **Foster social cohesion and community resilience by incentivising local food production, urban horticulture, and edible landscapes.**

## SEQ Regional Plan 2023

**The Yatala–Stapylton–Beenleigh Regional Economic Cluster is a significant hub for food-system activity, anchored by the Yatala Enterprise Area's strong manufacturing and integrated food and beverage supply chains. Supported by extensive transport and logistics infrastructure, it is complemented by Beenleigh's role as a regional centre offering retail, hospitality, community, and cultural services.**

## Logan Plan 2015

**The Logan Planning Scheme 2015 sets the strategic and statutory framework for land uses across Logan, and Council encourages local industry growth, including food and beverage activities. Logan's new planning scheme will unlock 600ha of greenfield land for commercial/industrial development, in an area that is expected to see an extra 200,000 residents in the next 20 years.**

### Eat & Drink Logan

- There are over 234 cultures and ethnicities in Logan providing global flavours for local food tourism
- Logan City Council supports local small businesses, with local itineraries of events and restaurants available online through the Explore Logan website. Examples include the Local Indulgence Trail and the Industrial Gourmet Trail
- Logan also offers a range of markets, such as the Global Food Market, Jimboomba Country Markets, and Beenleigh Showground Markets

### SnapFresh

- Logan-based SnapFresh produces over 20 million ready-made meals annually
- It drives food-system innovation through advanced production, vending solutions and diversified markets
- Sustainability and a strong team culture guide its operations, reflected in waste-reduction initiatives and award-recognised environmental efforts

### Little Red Dumpling

- Manufacturing is one of Logan's largest industries, with food and beverage processing a key sub-sector
- One example of economic development is the Little Red Dumpling company, which received support from the Logan Economic Development team to develop a multimillion-dollar manufacturing facility in Woodridge, serving as a central kitchen and distribution hub

### Drone Deliveries

- In 2019, the drone delivery company Wing expanded operations in Australia. The City of Logan hosted the first drone delivery service in Australia
- Drone deliveries can be up to 1.2kg and can be used to deliver fresh food, medicines, household items, and tools
- Drones may support additional pathways for the delivery of essential food items and household goods
- In Logan, Wing is able to complete 1,000 deliveries daily and now services most of the city, flying out of places like Grand Plaza Browns Plains and the Logan Hyperdome

# Moreton Bay

## Food System Priorities

- High-quality specialist produce
- Food identity connected to local produce
- Balancing agricultural production with a growing population

## Pressures

- Climate resilience and extreme events
- Population growth
- Land use and availability
- Water security
- Biosecurity (aquaculture and fisheries)

## Opportunities

- Supporting local food procurement for sustainable agri-food tourism
- Supporting small food producers to shorten food supply chains
- Exploring value-adding, from high-value commodities to advanced manufacturing
- Adopting precision agriculture technology

- Growing population from 522,494 in 2024 to 796,515 in 2046
- Has the second highest net internal migration rate in SEQ – around 5,800 people in 2024

- Food and agribusiness sales total more than $1.8 billion each year
- 28% of land use is zoned as agricultural, but total grower numbers are decreasing
- 11,114 jobs in agri-food occupations in 2021
- Most agricultural land is used for grazing and perennial horticulture, producing more than 60% of the total value of fruit produced in SEQ
- Food & Agribusiness is one of four key priority industries in the City of Moreton Bay's Economic Strategy 2020-2041

- Class A recycled water is available for use by local farmers for food crops
- The City of Moreton Bay manages more than 10,000 hectares of conservation areas and natural areas
- Climate risks and natural hazards are the focus of local council mapping initiatives

- Proximity to the Port of Brisbane and Brisbane Airport supports freight and export
- Supply chain mapping for food sectors like seafood supports sustainability
- Home to the University of Sunshine Coast Moreton Bay campus and the University of Queensland Moreton Bay Research Station

- The Moreton Bay Farm Trail connects local farmers and family farms with visitors and community
- Other events include the Eat Local festival, Eco Fest, Music in the Valley, and holiday festivals

## City of Moreton Bay: Food and Agribusiness Industry Plan 2024–2028

- This plan contributes to the delivery of key economic goals and outcomes from the City of Moreton Bay Economic Strategy 2020–2041.
- The plan's vision is to transform Moreton Bay into a leading city for sustainable and innovative agriculture, enhancing economic growth, community wellbeing, environmental stewardship and placing our city as a food and agriculture powerhouse for the Brisbane 2032 Olympic and Paralympic Games.
  - The Strategy framework identifies food and agribusiness as one of four priority industries in the City of Moreton Bay.
  - The plan identifies Council's role to support the growth of food and agribusiness in line with the Strategy's goals to create a bigger, bolder and brighter future. This Plan aims to harness the city's rich agricultural heritage, vibrant and growing community, and strategic location to boost local food production, support sustainable practices, and promote agritourism. By fostering innovation, enhancing supply chains, and creating robust support systems for farmers, food manufacturers, and agribusiness entrepreneurs, we can build a resilient and thriving food and agribusiness ecosystem.

**Action Plan**

1. Technology advancement: Support programs for technology adoption and establish links with agricultural technology organisations.
2. Skills and workforce: Support the annual jobs expo, develop an accelerator program, and encourage First Nations connections to agricultural career pathways.
3. Collaboration: Connect with the tourism sector, facilitate the Moreton Bay Growers Group, and pilot a Dark Kitchen initiative for small business food manufacturing.
4. Knowledge: Investigate value-add benefits from the Wamuran scheme and better understand livestock supply chains in the region.
5. Identity: Develop a branding program, agritourism, and celebrate local farmers.

### Farming Queensland Native Tropical Rock Oysters

- The Queensland Sunshine Oyster is a tropical rock oyster species native to the state, promising commercial success following research and development conducted since 2021 by QLD DPI and FRDC
- Trials of the Queensland Sunshine Oyster are being held at Moreton Bay
- The oysters are highly resistant to QX (a parasite-driven disease decimating Sydney Rock Oysters), can be farmed in areas that cannot be accessed by the Sydney Rock Oyster, and have high tolerance of variable water temperatures (resilience to climate change)

### Beyond the Farm Gate Program

- Supports Moreton Bay farmers and producers to develop agritourism ventures through expert-led workshops, mentoring, and practical tools
- Offers two capacity-building streams: the Agritourism Incubator and Accelerator programs, running throughout 2025
- Helps participants create concept and full business plans to diversify, add value, and strengthen connections with consumers

### Unitywater's Wamuran Irrigation Scheme

- Class A recycled water is now available for use by farmers in the Moreton Bay area for a range of crops, including strawberries, raspberries, and pineapples
- Up to 2.6 GL of recycled water access increases resilience to drought and climate events
- The new recycled water treatment plant also diverts 11 tonnes of nitrogen and 1.8 tonnes of phosphorus away from the Caboolture River to support the environmental health of the local catchment

# Noosa

## Food System Priorities

- A locally grown, eco-friendly food system
- Sustainable local food production, with a focus on boutique products

## Pressures

- Land use pressures and land costs
- Council size affecting resourcing
- Limited data available for smaller food producers in the region
- Disconnect between producers and manufacturers
- Supply chain logistics and costs

## Opportunities

- Combining sustainable local food products with eco-friendly tourism
- Integrating local foods into the hospitality sector and events
- Exploring partnerships with bush food providers, educators, and stewards
- Sharing knowledge with other similar sized councils

- Growing population from 65,989 in 2024 to 75,700 in 2046
- Accommodation and food services industry is second largest employer (12%)

- Gross value of agriculture production is $21 million, including:
  - nurseries ($9.9 million)
  - macadamia production ($5.1 million)
  - livestock disposals ($2.7 million)
  - milk production ($800,000)
- There are 275 agribusinesses in Noosa, with 79% turning over less than $200,000
- 14% of the workforce is employed in primary industries (including first-stage processing & food supply chains)

- 26% of land use is zoned as agricultural – mostly used for grazing and perennial horticulture
- More than 40% of Noosa has some form of protective conservation tenure
- Noosa UNESCO Biosphere Reserve status supports clean, green, local food and beverages

- Noosa agrifood is closely interconnected with Sunshine Coast supply chains
- There is a need to develop efficient local supply chains to keep up with demand for sustainably grown local produce
- Home to Central Queensland University's Sunshine Coast campus

- Has a Liveability Index Score above 70 – higher than the national average
- Food markets and festivals include the Noosa Food + Wine festival and farmers' markets

## Noosa Council Corporate Plan 2023–2028

**The Noosa Corporate Plan is built around five strategic themes that guide Council in achieving its long-term vision for the area. Each theme includes clear objectives, signature projects, and key actions to drive progress throughout the plan's implementation, including initiatives that support food-related priorities where relevant.**

**The prosperity theme focuses on creating a resilient, diverse economy that supports local businesses, fosters innovation, and promotes sustainability through initiatives in economic development, enterprise, arts, and waste management. A key action is preparing a Food and Agribusiness Development Plan with stakeholders, including assessing a Food and Agri Business Hub, while aiming to divert 90% of green waste and food waste from landfill by 2028.**

## SEQ Regional Plan 2023

**Noosa's rural and natural landscapes, along with its vibrant towns and villages, play a vital role in the region's success. These areas form part of South East Queensland's food bowl, supporting agricultural productivity while offering biodiversity, scenic environments, and tourism opportunities that enhance the area's appeal.**

### Local Council Procurement Policy for Sustainability

- Noosa Council has several policies that support the use of local produce
- The Council Procurement policy includes a "local buy" element
- The Sustainability Policy for any events held in Noosa include a local procurement weighting in addition to other local weightings (e.g., employment opportunities)

### Mapping the Sunshine Coast and Noosa Food and Agribusiness Ecosystem

- Local producers face a range of challenges regarding the agrifood supply chain in the Noosa and Sunshine Coast regions, such as infrastructure (e.g., cold storage, distribution), costs, labour availability, and funding
- A collaborative study across the regions recommended that a shared logistics and transport network could reduce cold chain and transportation costs
- A centralised logistics hub in Noosa could support innovation and streamline distribution, while also promoting business collaboration in the regions

### Slow Food Noosa

- Promotes good, clean and fair food by supporting local growers, food artisans, and biodiversity
- Runs the Snail of Approval program to inspire sustainable, ethical food production across the region
- Delivers community-focused events and projects that educate, fundraise, and strengthen local food systems

### Maravista Farm

- Maravista Farm supplies fresh, organic produce directly to Ogilvie Group venues in Noosa, reducing food miles and ensuring seasonal, locally sourced ingredients
- The farm practices sustainable agriculture by using compost from restaurant food waste, creating a closed-loop system that regenerates soil health
- By growing diverse crops, including macadamias, citrus, vegetables, and herbs, Maravista Farm strengthens regional food security and promotes paddock-to-plate dining

## 2.7 LGA INSIGHTS

# Redland

### Food System Priorities

- **Transitioning from food production to food technology and manufacturing**
- **Growing manufacturing, technology, and business capability**
- **Grow agritourism and artisan brands**
- **Strengthen island supply chain resilience and emergency food access**

### Pressures

- **Population growth**
- **Land use changes and zoning (urban and conservation areas)**
- **Supporting island communities**
- **Extreme events affecting food access and affordability**

### Opportunities

- **Exploring coastal activation with well-designed food environments (≈335 km coastline)**
- **Creating a nature tourism hotspot with the potential to leverage local food experiences**
- **Exploring aquaculture and fisheries**

- Growing population from 170,225 in 2024 to 183,649 in 2046
- Exploring trade and export opportunities with international delegations

- Gross value of agriculture production is $145 million, including:
  - livestock disposals – poultry ($77.8 million),
  - nurseries ($58 million)
  - lettuce ($4.4 million)
  - eggs ($2.1 million)
  - livestock products ($2.1 million)
- 183 agricultural businesses, and 66% have a turnover less than $250,000

- 18% of land use is designated as conservation land and 5% is zoned as agricultural
- Hosts 335 km of coastline and six inhabited islands

- Local and island supply chains are affected by natural and urban disruptions. Extreme events can cause power outages and affect food access, safety, and storage on the islands
- Recovering from extreme events requires logistics around food drops and food waste

- Local markets such as the Cleveland Markets, Redlands Coast Collective Markets and island/eco/twilight markets offer fresh produce and artisan goods from local enterprises
- Events include the Straddie Oyster Festival and Eco Markets

## Our Future Redland City: Corporate Plan 2026–2031 – A Food Lens

**Sustainable environments: Clean, green, and thriving natural environments that are respected, nurtured, and enjoyed by all.**

- **Encourages community to buy green, grow food, and plant natives.**

## Event-Specific Recovery Action Plan for Tropical Cyclone Alfred (June 2025)

**The action plan highlights the importance of prioritising waste management, emergency food distribution, resilience for isolated areas, and cross-sector collaboration as part of a food system resilience strategy.**

- **The Council's recovery communications sought to offer the local community a sense of connection and reassurance by sharing messages about drop-in recovery hubs, financial support, mental health services, food drops, and free locations for recharging phones and other devices.**
- **Food security challenges during the event included residents running out of food and being unable to cook due to extended power outages and a limited supply of butane gas on the islands.**
- **There was surplus food waste due to prolonged power outages and flooding, as well as public health and food safety concerns following power outages.**

### FlyFarm: A Circular Economy Initiative

- FlyFarm's mission is to upcycle the useful proteins in organic waste streams into insect protein for animal feed, and to do so with negative emissions
- FlyFarm is an agri-tech company that enables a highly automated vertical insect farm
- The FlyFarm System is a cloud-connected array of in-house-designed robotic handlers, environmental sensors, and software control mechanical shifters that can operate 24/7

### Wellington Point Farmhouse

- Wellington Point Farm House offers farm-gate direct-to-consumer experiences
- The local, family-owned business blends agriculture, education and dining to create meaningful hospitality
- Located on historic farmland, the farm house celebrates quality flavours, connection, and thoughtful, purpose-driven farm-to-plate experiences

### Farmers2Founders

- Since 2018, Farmers2Founders has been on a mission to shake up the agrifood game
- By turning bold concepts into real-world solutions, fast-tracking innovation, driving adoption and real impact, F2F plays a role in preparing for our new climate reality
- F2F aims to support primary producers by providing the latest tools and technologies to support their enterprises in new agricultural technology and food technology business ventures

### Redlands IndigiScapes Centre

- This environmental education centre sits on 14.5 hectares of natural bush land
- Its IndigiCafe serves locally inspired food and drinks with native ingredients, and its botanic garden has a bush tucker trail. There is a native nursery on site which offers native plants from the region at affordable prices

# Scenic Rim

## Food System Priorities

- Food production and agritourism, expanding into manufacturing
- Food production for local consumption and export
- Agritourism and events

## Pressures

- Water availability and security
- Land availability
- Workforce for agribusinesses
- Resilience of small businesses

## Opportunities

- Value-adding through advanced manufacturing and agricultural technology
- Demonstrating a strengths-based approach to collaboration with other local governments to manage upstream and downstream dependencies in the food system

- Projected population growth by SRRC from 50,000 in 2025 to 84,000 in 2046
- One of the highest agricultural land productive capacities in SEQ (land/person)
- Population growth is creating land use pressure and opportunities for supplying local food to residents

- Agriculture and tourism account for over $550 million of GRP, ($2.49 billion) with 1,143 agriculture businesses ($281 million) and 586 tourism businesses ($270 million)
- More than 90% of agrifood businesses are small businesses, with many sole traders
- 18% of the workforce is employed in primary industries, including first-stage processing and food supply chains

- 76% of land use is zoned as agricultural and 12% is conservation protected land
- Most of the agricultural land is used for grazing, followed by broadacre cropping
- Scenic Rim Regional Council and Logan City Council are collaborating to improve catchment water quality

- Easily accessible – located one hour from major city centres, connected via both road and rail, with access to Port of Brisbane and international airports, providing opportunities for interstate and international export

- Champions local food events, such as Eat Local Month, from which attendees report a greater likelihood of buying more local produce
- There are many farmers markets, with a wide range of local artisanal produce available

## Scenic Rim Agribusiness and Agritourism 10-year Roadmap, 2022-2032

**The Roadmap guides local government in building resilient food systems through agribusiness, agritourism, and capacity building. The vision prioritises agriculture and tourism as economic drivers, offering communities access to quality local food and supporting sustainable farms and businesses. It commits to protecting agricultural land and water resources while promoting food-producing gardens and distinctive agritourism experiences. Eleven objectives and 17 initiatives aim to strengthen the Scenic Rim brand, expand agritourism, and foster diversified, sustainable agribusinesses.**

## SEQ Regional Plan 2023

**Rural areas like Scenic Rim, Noosa, Lockyer Valley, and Somerset, with their vibrant towns and villages, are essential to SEQ's success. They include our food bowl, along with key biodiversity zones, natural resources, and tourism and recreation opportunities.**

**The Scenic Rim, Lockyer Valley, Somerset and Ipswich regions contain key rural lands for horticulture, forestry, and grazing, forming one of Australia's most significant food bowls. These areas are vital for long-term food security and export growth. The land and supporting processing infrastructure will be safeguarded by preventing fragmentation and protecting rural industries and supply chain activities from incompatible development.**

### ECO Destination Certification

- The Scenic Rim hosts UNESCO World Heritage Gondwana rainforests and six National Parks
- The region was awarded ECO Destination Certification in 2025 (Ecotourism Australia), becoming the 12th region in Australia to be certified
- The award recognises global best-practice standards in ecotourism, responsible travel, and environmental conservation, including sustainably produced local food experiences

### Scenic Rim Agricultural Industrial Precinct

- Currently under construction by Kalfresh - one of SEQ's largest vertically-integrated farms - this precinct has a vision to become the new home of advanced food and beverage manufacturing in SEQ
- Kalfresh aim to create Australia's first on-farm closed loop facility, powered by renewable energy and converting food and agricultural waste to gas and biofertilisers
- The precinct is seeking to attract a range of industries that support the agricultural sector, such as meal kit production, processing and packaging, cold storage, canning and fermenting, agricultural research and innovation, and fibre processing

### Eat Local Month

- Eat Local Month features 100 events, with more than 60 on-farm experiences showcasing local produce and agritourism every year
- Around 30,000 visitors attend food events such as Eat Local Month, contributing over $2 million to the local economy in 2025

### Bromelton State Development Area

- The Bromelton SDA provides large-scale industrial land supporting high-impact, rail-dependent industries in the Scenic Rim and broader SEQ food system
- Its strong freight and logistics connections enhance regional supply chains and access to Brisbane and interstate markets
- Key tenants—Gelita Australia and AJ Bush & Sons—strengthen local protein manufacturing and rendering capabilities within the precinct. The precinct provides future opportunities for processing, value-add and resource recovery
- Eat Local Month includes events at farms, wineries, distilleries, and more, as well as paddock-to-plate experiences

# Somerset

## Food System Priorities

- Protein precinct
- Food production and manufacturing

## Pressures

- Land availability and fragmentation
- Heavy dependency on key arterial roads
- Smaller population (affects workforce and consumer numbers)
- Availability of accommodation for workers
- Fewer retail market options for locals

## Opportunities

- Exploring agritourism to supplement food production
- Using regional collaborations to strengthen support for agricultural production
- Supplementing farmer incomes and supporting productivity through environmental programs and markets

- Growing population from 26,579 in 2024 to 34,836 by 2046
- Has the highest agricultural land productive capacity in SEQ (land/person)
- 24% of employment is associated with primary industries, including food supply chains

- Gross value of agricultural production is $175 million, including:
  - livestock disposals ($99.8 million)
  - vegetable production ($44 million)
  - turf ($15.5 million)
  - livestock products ($7.7 million)
- 735 agribusinesses and 24% of employment is in primary industries, including first-stage processing & food supply chains

- 66% of land use is zoned as agricultural
- 95% of agricultural land is used for grazing, with a smaller amount used for seasonal horticulture
- 11% of land is environmentally protected, to reduce further land fragmentation

- Major highways support connectivity (D'Aguilar, Brisbane Valley)
- The Lockyer-Somerset water collaborative aims to secure a water supply (recycled water)

- Local events include the Food Trail and Somerset Legends of Beef (paddock to plate)
- Local producers are exploring agritourism opportunities to supplement farming incomes
- Local farmers' markets include Esk, Fernvale, Kilcoy Yowie, and Linville Country Markets

## Somerset Regional Council Corporate Plan 2021-26 and Operational Plan 2025-26

**These plans acknowledge the importance of food and agriculture to the region. Tourism is one of the food system entry points for the region. Somerset aims to boost tourism and economic growth by implementing its 2021–2025 Tourism Strategy, and Economic Development Strategy, focusing on short-term priorities for visitor attraction and destination management. A key initiative is developing agritourism opportunities through partnerships with emerging operators. Actions include improving operator capability, promoting agritourism products through marketing, and exploring event options such as a farmgate trail. In addition, the Operation Plan also takes into account food safety initiatives and highlights the importance of the Lockyer-Somerset Water Collaborative.**

## SEQ Regional Plan 2023

**The SEQ Regional Plan emphasises the importance of rural areas such as Somerset, Noosa, Lockyer Valley and Scenic Rim, which contain prosperous towns and form one of Australia's most significant food bowls. These lands, used for horticulture, forestry, and grazing, are critical for long-term food security and export opportunities.**

**The plan prioritizes protecting land and processing infrastructure from fragmentation and incompatible uses, while exploring alternative rural futures to diversify and strengthen productivity against market cycles and climate change. The Queensland Government will collaborate with councils and stakeholders to secure sustainable water supply and maintain agricultural capacity. Hinterland areas will also support boutique industries and agri-tourism, provided impacts on agricultural productivity and the environment are managed.**

**Somerset Legends of Beef**

- This event is supported by Somerset Regional Council via Experience Somerset
- It offers a nose-to-tail celebration of local beef producers in Toogoolawah Showgrounds
- A four-course beef experience features local stories from beef producers, some of whom are sixth-generation farmers from the region
- The Program also supports the community by raising funds (e.g., for the local high school)

**Brisbane Valley Rail Trail**

- Australia's longest recreational rail trail at 161 km, provides visitors with the opportunity to explore regional towns, stay, eat and drink along the way
- The Brisbane Valley Rail Trail offers riders access to country cafés serving fresh local produce and homemade treats
- Nearby towns host farmers' markets and food festivals where visitors can sample artisan cheeses, meats, and baked goods

**Somerset 'Buy Local' initiative**

- Launched in October 2024, the Support Our Somerset Choose Local initiative aims to support small businesses in the community to promote and strengthen the region's economy through thriving and resilient enterprises
- The initiative also aims to benefit the liveability of the region through thriving and vibrant small towns with increased community connections

**Brisbane Valley Protein**

- This dedicated and approved protein production hub (Coominya, Queensland) is led by fourth-generation farmers from the region who have a passion for supporting agricultural innovation
- The hub produces the world's largest table quail, accredited poultry, and pasture-raised cattle

2.10 LGA INSIGHTS

# Sunshine Coast

## Food System Priorities

- High-quality boutique products and sustainable tourism
- Sunshine Coast food identity
- Protecting productive rural land and local supply chains and processing

## Pressures

- High cost and availability of land for agrifood operations
- Limited serviced industrial land for food & beverage manufacturing
- Regional cold storage shortages
- Workforce and housing shortages

## Opportunities

- Strengthening collaborative industry and government networks
- Expansion of value-added food and beverage manufacturing
- Growing production of high value artisanal and value-added local food and beverage products
- Offering a combination of agritourism and ecotourism

- Growing population from 375,328 in 2024 to 545,523 by 2046
- 13% of the workforce is employed in primary industries, including food supply chains

- Gross value of agriculture production was $310 million in 2021
- Produces 13% of Queensland's intensive horticulture and 13% of its poultry
- 440 agribusinesses with approximately 12,000 jobs in agri-food occupations in 2021

- 30% of land use is zoned as agricultural – mostly used for grazing, with some perennial horticulture
- 19% of land is zoned as protected conservation land, including the Sunshine Coast Biosphere Reserve

- A recent map of the food and agribusiness ecosystem on the Sunshine Coast and in Noosa identified the potential for a shared logistics and transport network
- Provides the fastest data and telecommunications connection point from Queensland and Eastern Australia to Asia
- Benefits from ease of access to multiple ports including the expanded Sunshine Coast Airport and proximity to Brisbane Airport and Port of Brisbane
- Home to the University of the Sunshine Coast

- Local events include The Curated Plate - a Sunshine Coast Council-owned and facilitated annual food and drink festival program that showcases local producers and hospitality businesses through curated events across the region
- Many farmers' markets, all supporting local produce and agritourism

## Sunshine Coast Stretch Reconciliation Action Plan (RAP) 2025-2028

The Sunshine Coast Stretch RAP identifies procurement as a lever that can have broader food system benefits:

- Sunshine Coast hosts an annual First Nations Supplier Day to strengthen business connections and economic opportunities. In 2024, over 30 First Nations businesses showcased services across industries, including bush foods, labour hire, software development, and cultural services. The event connects businesses with buyers and government, promotes the First Nations supplier market, and encourages collaboration on procurement.
- Procurement priorities include building capability aligned with RAP's First Nations procurement policy and targets. Targets aim for 3% First Nations employment and 2% First Nations procurement to drive equitable economic outcomes.

## Sunshine Coast Regional Economic Development Strategy (REDS) 2013-2033

The Sunshine Coast economy is evolving through sectors like professional services, advanced manufacturing, and food and agribusiness.

Competitive advantages include the local agri-business sector, craft food and beverages, good climate and soils for high-quality agricultural production, and access to SEQ markets.

Regional growth plans highlight the production economy, including aviation, aerospace, and food and agribusiness, alongside advanced manufacturing and biotech. The knowledge economy will complement this growth through professional services, education, health, and research.

## SEQ Regional Plan 2023

The region will protect key agricultural lands to ensure long-term food security and export growth. Opportunities include expanding and diversifying the regional food system, supporting locally branded and artisanal food and beverage production, and meeting rising demand for farmers' markets, dairy products, meats, and subtropical fruits. Agri-tourism and niche food production complement this growth.

**Food and Agribusiness Network (FAN)**

- Established in 2015 through the Sunshine Coast REDS
- Industry led network supporting producers and manufacturers across the Sunshine Coast, Noosa and Moreton Bay
- Delivers programs such as Grow National, Meet the Makers and Queensland's Sunshine Pantry, to build capability, collaboration, and market access
- Strengthens regional supply chain integration and cross LGA industry connectivity

**Sunshine Coast Manufacturing Hub**

- Queensland Government-supported hub for the Sunshine Coast, Noosa and Moreton Bay
- Supports a region with 4,000+ manufacturing businesses and 33,000+ skilled workers
- Provides specialist advisory support and targeted manufacturing capability programs
- Supports value added food and beverage manufacturing and efficient industrial land use

**Resilience through local networks: White's IGA**

- The Sunshine Coast frequently experiences severe weather that disrupts key supply routes
- Local route knowledge and community ties helped Whites IGA secure essential food supplies during disruptions
- White's Locavore Program highlights local produce and strengthens community-based resilience
- Sunshine Coast Council's Economic Development team leads economic recovery to support business continuity after major weather events

**Events and Festivals**

- The Sunshine Coast hosts the Iron Man triathlon each year. There is an opportunity to build on events like this by expanding into larger festival arrangements to generate additional local benefits
- Examples include sponsorship agreements featuring local procurement elements or supporting local visitors to stay longer
- Tools such as Spendmapp by Geografia aggregate spend data from card purchases and model spending to identify economic impact

# Toowoomba

## Food System Priorities

- Regional hub for ag services, supply chains, and innovation across inland Queensland
- Protect and enhance a highly productive food bowl
- Strengthen climate resilient agricultural systems
- Enable value adding through food processing and manufacturing
- Grow ag tech capability and food system skills

## Pressures

- Climate variability and increasing extreme weather events
- Water security pressures associated with growth and climate variability
- Farm succession and workforce transition
- Reliance on external processing capacity

## Opportunities

- Expansion of protected cropping and controlled environment projects
- Accelerating ag tech adoption, and on-farm productivity gains
- Transition to carbon neutral and low emissions supply chains
- Growth in regional food manufacturing and processing
- Leveraging events and tourism to showcase regional food systems

- Growing population from 184,377 in 2024 to 211,402 by 2046
- Approximately 17% of the workforce employed in primary industries and food supply chains

- Gross value of agricultural production exceeded $1 billion (2021), including:
  - 80% of Queensland eggs
  - 16% of Queensland cotton
  - 15% of Queensland broadacre crops
  - 19% of Queensland piggeries

- More than 3,500 agribusinesses and 8,485 agri food jobs (2021)
- Combines high value agricultural production with processing, ag tech, research, education and freight connectivity, underpinning SEQ's food security and export capability

- Among the highest agricultural land productive capacities in SEQ (land/person)
- Significant investments in regional water supply and security, including upgrades to Cressbrook Dam

- A critical inland food, agribusiness and logistics hub servicing the Darling Downs, Western Downs and broader southern Queensland catchment
- Strategically located at the juncture of three highways critical to the servicing of both SEQ, and the broader southern Queensland region
- Wellcamp Airport and the Port of Brisbane provide opportunities for interstate and international export markets

- Vibrant events and markets including Carnival of Flowers, International Street Fiesta and regular farmers' and community markets
- Lifestyle, services and affordability support workforce attraction and visitor economy growth

## Toowoomba Region Economic Development Strategy

**Toowoomba Regional Council's 2026- 2031 (draft) Economic Development Strategy sets a long-term vision for a globally competitive, resilient and inclusive regional economy, with agriculture and food manufacturing as priority industries.**

**Key objectives relevant to the food system include:**

- **Attracting and scaling food processing and value-adding enterprises.**
- **Supporting enabling infrastructure (water, energy, land, freight).**
- **Positioning Toowoomba as a leading Queensland food manufacturing hub.**
- **Strengthening regional collaboration, branding and food-based visitor experiences.**

## Development Incentives to Encourage Growth and Investment

- **Toowoomba Regional Council has a number of development incentives aimed at attracting investment, new employment opportunities, housing supply, and economic activity across the region.**
- **This includes agritourism, food tourism, Indigenous tourism and eco-tourism, and investment into intensive rural agricultural production.**
- **Incentives include reduced development application fees and/or infrastructure charges.**

## Research and Development

**Targeted R&D initiatives are advancing innovation and resilience within Toowoomba's agrifood sector, including the following UniSQ projects:**

- **Agtech innovation advancing drought mitigation, crop health and northern grains extension.**
- **Circular economy research transforming food waste and by-products into value added products and sustainable materials.**
- **Applied research strengthening food security, water treatment solutions and regional agrifood resilience.**

### Industry Biotechnology Centre, AATLIS Innovation Precinct

- $50m proposed, vertically integrated biotechnology facility
- Sustainable agricultural inputs, bioproducts, R&D, manufacturing & commercialisation
- Strengthens sovereign manufacturing, ag-innovation and value-adding within SEQ's food system

### Toowoomba Manufacturing Hub

- A Queensland Government initiative focussed on improving manufacturing capability, driving innovation and supporting job creation in southern inland Queensland
- Food and beverage processing identified as a core regional strength
- Toowoomba Region hosts more than 1,000 manufacturing businesses, making it a critical hub for supplying manufactured equipment and technology that is used in the agricultural production sector, as well as food and beverage processing

### Food Leaders Australia

- National, industry-led initiative headquartered in Toowoomba driving high-value food manufacturing and value-adding across Australia
- Connects industry, research, investors and government to accelerate commercialisation, scale-up and export capability, aligned with SEQ resilience and productivity priorities

### Mort & Co – Feedlot & Circular Economy Leader

- Australia's largest beef cattle feedlot operator (flagship Grassdale Feedlot licensed for ~70,000+ head)
- Industry leadership in circular economy innovation—repurposes cattle manure from feedlot operations into organic, carbon-based fertilisers reducing waste and enhancing soil health through sustainable nutrient cycling
- Local economic impact by supporting farming productivity and growing regional agribusiness linkages, and logistics relationships

# 3 SOUTH EAST QUEENSLAND FOOD SYSTEM INSIGHTS

The SEQ food system is shaped by rapid population growth, increasing cultural diversity, and evolving dietary and consumption patterns. As demand for food rises, the region faces pressure on its agricultural land base, productive capacity, supply chains, and retail infrastructure. At the same time, SEQ plays a dual role, serving as both a major food producing region and a highly interconnected importer of food from interstate and global markets.

Population and consumer trends influence what food is required, when and where, while local resources, land availability, climate disruptions and seasonal conditions, impacts how much can be supplied locally. The region's reliance on complex distribution networks can induce risks of disruptions or logistics bottlenecks on key freight routes.

The workforce is also a core pillar of this system. Food production, processing, distribution, retail, and food services collectively support a substantial share of jobs across SEQ. However, labour and skills shortages and a reliance on overseas workers, highlight emerging risks for workforce stability.

This section provides an overview of population trends and food demand, food supply (including production, processing/manufacturing, distribution, retail and services), and employment in the food system. Together, these elements highlight the need for strategic planning to support a secure, equitable, and sustainable food future for SEQ. Although seasonal, climate, water, biosecurity and broader market dynamics are recognised as important drivers, detailed analysis of these factors was beyond the scope agreed with CoMSEQ collaborators and is not fully explored in this report.

SNAPSHOT

# 3.1 Population growth and food demand

Peggy Schrobback, Nikki Dumbrell and Trang Thi Thu Nguyen

**1/3**
of the SEQ population are **food insecure**

**32%**
**overseas-born** population in Brisbane

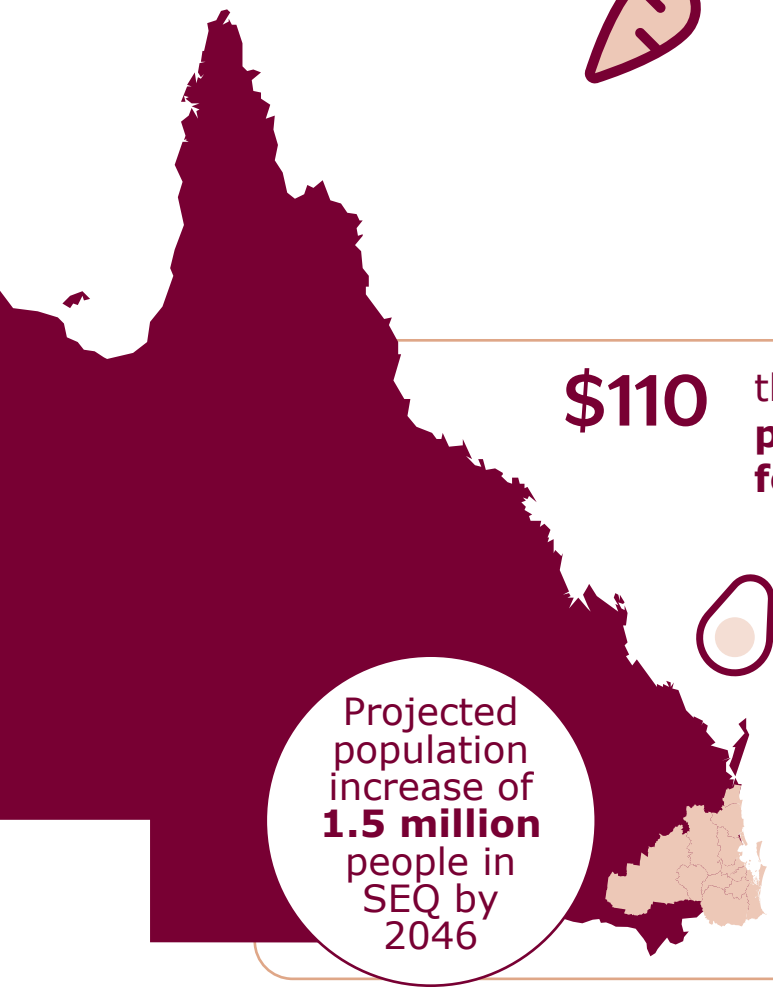
**3%** the **number of children** meeting the recommended **vegetable** intake

## OPPORTUNITIES

- Alignment of **planning priorities** with health goals
- **Reshaping food environments** to support healthy and culturally appropriate diet practices
- **Improve data capture and integration** to inform policy

## CHALLENGES

- **Food-related CPI consistently higher** than the national average for over ten years
- **Persistent diet** risks
- Population growth **driving demand** for **culturally diverse** foods
- **Socio-economic disparities**




**$110** the average **spent per person**, per week on **food and beverages**

**>78%** fresh food is purchased from **supermarkets**

**74%**
of Queensland's **population** located in **SEQ**

This section draws on secondary data to outline key population characteristics of SEQ, including current demographic profiles, projected population growth, food expenditure, food security and dietary-related health trends. It examines the region's cultural diversity, age distribution, and household structures, highlighting how these demographic dynamics influence food preferences, consumption behaviours, and emerging food values across the region.

### 3.1.1 Key insights

- About 74% of Queensland's population live in SEQ, concentrated in the high growth LGAs of Brisbane, Gold Coast, Ipswich, Logan, Moreton Bay and Sunshine Coast.
- Cultural diversity is a major demand driver, with Brisbane's overseas born population share (approximately 32%) indicating strong, ongoing demand for culturally appropriate foods and specialised supply chains.
- One-third of the SEQ population is food insecure and greater Brisbane's food-related Consumer Price Index (CPI, e.g., a measure for how the average prices of food items change over time, indicating the inflation rate specifically for food purchases) has been consistently higher than the national average for the last decade.
- Diet risks are evident. Low vegetable intake and high overweight and obesity rates persist across Queensland (based on measured height and weight in 2022, 69% of Queensland adults were overweight or obese), implicating equity, nutrition, and procurement settings in the regional food environment.

### 3.1.2 Population trends

SEQ has experienced substantial population growth in recent years. The population increased from 3.7 million people in 2019 to 4.1 million in 2024 (*Figure 6*; ABS, 2025b). This represents an increase of about 10% over a five-year period. Brisbane, Gold Coast, Moreton Bay, Sunshine Coast and Ipswich are the most populated LGAs in the region (*Figure 6*, *Figure 7*). In 2024, the population in SEQ represented about 74% of Queensland's total population (ABS, 2025b). It is expected that the population in SEQ will increase to 5.6 million by 2046 (*Figure 6*, Queensland Government, 2023b).

Key reasons for people to relocate to SEQ include appealing lifestyle and climate, strong economic opportunities (e.g., tourism, education, health, construction), family-friendly environment and well-developed infrastructure and accessibility, including an international airport, public transport, and expanding road network (Queensland Government, 2025f).

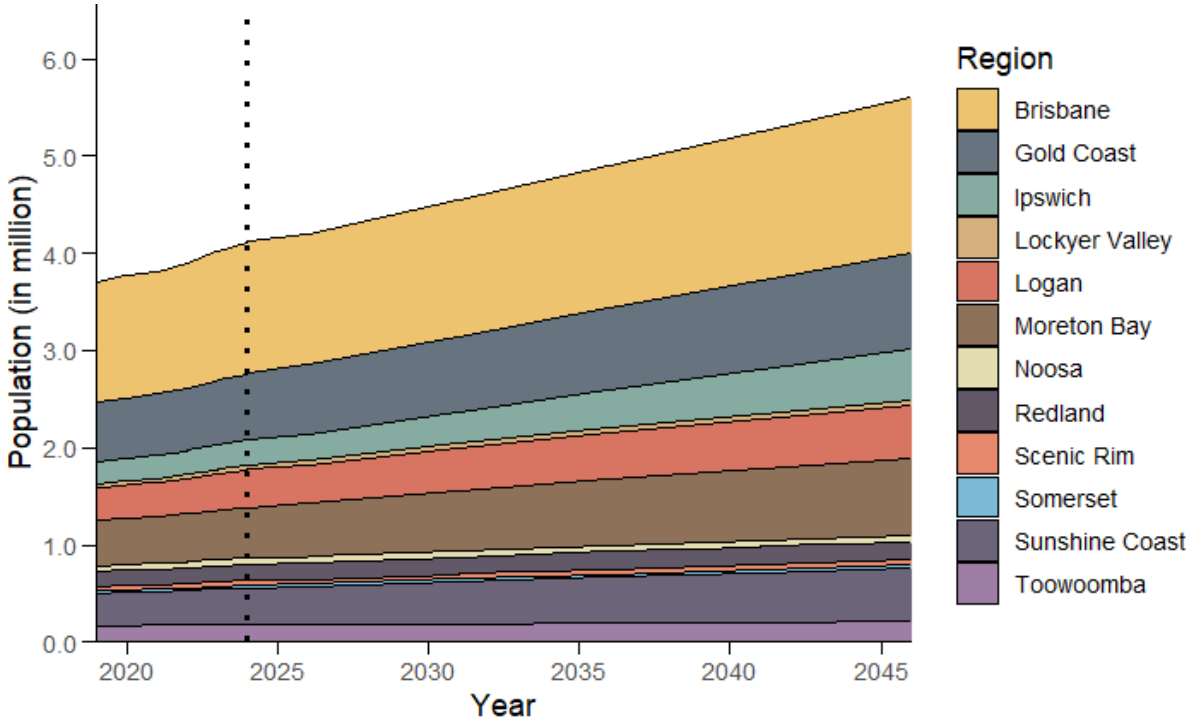



***Figure 6* Population growth projections by LGA in SEQ.**

Notes: Dotted line indicates latest actual observations. Sources: Data up to 2024 from ABS (2025); projected population (medium series) for 2026-2046 from Queensland Government (2023b). Medium-growth projections for 2046 were selected, as they are considered the most probable growth scenario for the region.

The relative size of the current population (2024) and projected population growth (to 2046) across SEQ LGAs is shown in *Figure 7*. The projected growth statistics (medium series) indicate that the LGAs expected to experience the most significant population growth include Brisbane, Gold Coast, Ipswich, Logan, Moreton Bay, and Sunshine Coast. Notably, the population of Ipswich is projected to more than double over the next 20 years. These LGAs are already among the most populated in SEQ. However, even medium growth in these areas may have important implications for land use planning, agricultural production, and the provision of local services, particularly where communities are dispersed or infrastructure capacity is limited. Population growth will lead to higher overall food demand, putting pressure on existing supply chains to scale up production, storage, and distribution. Urban growth in SEQ's most populated LGAs may impact local production, create congestion and bottlenecks in transport networks, affecting local availability and timely delivery of food. Together, these patterns highlight the need for coordinated regional planning to manage growth pressures, support liveability, and ensure that food system infrastructure keeps pace with population change.

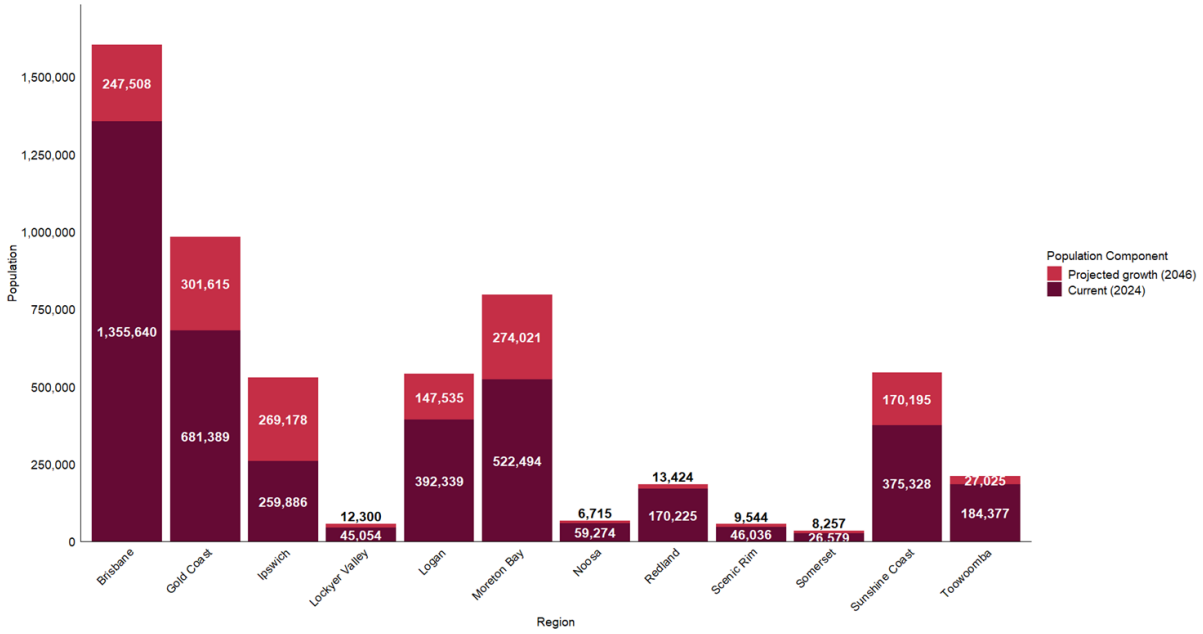



***Figure 7*** **SEQ population and projected growth by LGA.**

Note: Projected population growth for 2046 represents medium-growth projections which is considered the most probable growth scenario for the region. Sources: ABS (2025a), Queensland Government (2023b).

### 3.1.3 Demographics and household characteristics

Understanding demographic and household characteristics is central to food system analyses because these factors shape how much food is needed, who needs it, how it is accessed, and how the system must evolve. *Table 1* presents a detailed socio-economic profile of the population across the 12 LGAs in SEQ, including aspects such as population density, gender, age, ethnicity, income, and household composition.

*Table 1* **SEQ population profile by LGA.**

| INDICATOR | Year | Brisbane | Gold Coast | Ipswich | Lockyer Valley | Logan | Moreton Bay | Noosa | Redland | Scenic Rim | Somerset | Sunshine Coast | Toowoomba |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **POPULATION** | | | | | | | | | | | | | |
| Estimated resident population (no.) | 2024 | 1,355,640 | 681,389 | 259,886 | 45,054 | 392,339 | 522,494 | 59,274 | 170,225 | 46,036 | 26,579 | 375,328 | 184,377 |
| Population density (persons/km$^2$) | 2024 | 1,009.6 | 511.0 | 237.6 | 19.9 | 409.5 | 255.9 | 68.1 | 316.9 | 10.8 | 4.9 | 166.5 | 14.2 |
| Median age - persons (years) | 2023 | 35.7 | 39.1 | 33.6 | 39.3 | 34.3 | 39.1 | 50.8 | 43.4 | 46.6 | 44.9 | 43.0 | 39.0 |
| Working age population (aged 15-64 years) (%) | 2023 | 70.0 | 65.3 | 65.6 | 63.9 | 64.6 | 62.9 | 57.4 | 61.1 | 59.6 | 60.0 | 61.1 | 60.9 |
| **ABORIGINAL AND TORRES STRAIT ISLANDER PEOPLES** | | | | | | | | | | | | | |
| Aboriginal and Torres Strait Islander Peoples (%) | 2021 | 1.8 | 2.2 | 5.5 | 5.1 | 4.2 | 3.9 | 1.7 | 2.9 | 3.7 | 4.7 | 2.4 | 5.0 |
| **HOUSEHOLD SIZE & INCOME** | | | | | | | | | | | | | |
| Average household size (no. of persons) | 2021 | 2.5 | 2.5 | 2.8 | 2.7 | 2.9 | 2.6 | 2.4 | 2.6 | 2.6 | 2.6 | 2.5 | 2.5 |
| Median total household income (weekly) ($) | 2021 | 1,284.0 | 1,034.0 | 987.0 | 867.0 | 940.0 | 988.0 | 938.0 | 1,046.0 | 866.0 | 799.0 | 983.0 | 938.0 |
| $1-$499 per week (%)* | 2021 | 11.6 | 14.6 | 15.7 | 19.9 | 16.9 | 16.0 | 17.0 | 16.2 | 19.2 | 22.4 | 15.9 | 18.1 |
| $500-$999 per week (%)* | 2021 | 21.6 | 28.2 | 30.3 | 30.9 | 31.5 | 29.9 | 30.4 | 26.8 | 31.8 | 31.4 | 29.8 | 29.9 |
| $1000-$1999 per week (%)* | 2021 | 37.1 | 35.8 | 37.1 | 31.7 | 35.3 | 35.4 | 30.1 | 36.0 | 30.1 | 28.4 | 34.0 | 33.3 |
| $2000-$2999 per week (%)* | 2021 | 14.7 | 8.4 | 6.9 | 4.8 | 6.0 | 8.0 | 7.3 | 9.5 | 5.9 | 4.6 | 7.8 | 6.9 |
| $3000 or more per week (%)* | 2021 | 7.5 | 3.9 | 1.8 | 1.4 | 1.5 | 2.6 | 5.3 | 3.3 | 2.6 | 1.7 | 3.4 | 2.7 |
| Nil income (%) | 2021 | 1.6 | 1.9 | 1.3 | 1.8 | 1.5 | 1.3 | 1.9 | 1.5 | 1.7 | 2.0 | 1.4 | 1.6 |
| Partial income stated (%) | 2021 | 4.7 | 5.4 | 5.3 | 7.0 | 5.5 | 5.3 | 6.1 | 5.0 | 6.3 | 6.9 | 6.0 | 5.7 |
| All incomes not stated (%) | 2021 | 1.1 | 1.7 | 1.6 | 2.4 | 1.8 | 1.6 | 1.9 | 1.6 | 2.3 | 2.6 | 1.7 | 1.9 |

Notes: Year indicates the most recent year for which population indicator data was available. * Equivalised total household income (weekly) – Census 2021. Next Census will be held in August 2026. Source: ABS (2023b; 2025a).

The total population and density vary widely across the region ranging from 4.9 persons per km² in Somerset to 1,009.6 persons per km² in Brisbane (ABS, 2025b). In high-density areas such as Brisbane and the Gold Coast, concentrated populations require larger volumes of food and more frequent deliveries to meet demand. In contrast, low-density LGAs such as Somerset and Scenic Rim require different food-supply logistics, as residents are more dispersed and transport distances are longer.

Median age also differs considerably across the LGAs. Ipswich (33.6 years), Logan (34.3 years), and Brisbane (35.7 years) have the youngest population, while Noosa (50.8 years) and Scenic Rim (46.6 years) have the oldest (ABS, 2025b). Different age groups have distinct food and nutrition needs. LGAs with younger populations require affordable, family-sized food products, school-based food programs (e.g., tuckshops), and diets tailored for children and teenagers. In contrast, older LGAs require smaller portion sizes, age-friendly food options, and support services such as home-delivered meals and community kitchens.

Ipswich, Lockyer Valley, and Toowoomba have the highest proportions of Aboriginal and Torres Strait Islander populations relative to their total populations (approximately 5% each). Understanding where Aboriginal and Torres Strait Islander families live is essential when developing a food strategy for SEQ because food plays a central role in health, culture, identity, and connection to Country (Christidis et al., 2021). Tailoring food system responses to the needs of First Nations populations helps ensure that policies address structural barriers rather than relying on one-size-fits-all solutions. Food supply should also respect and support access to culturally preferred foods, both traditional bush foods and contemporary staples, as well as the ability to harvest, prepare, and share food in culturally meaningful ways (Cartwright et al., 2025). This includes considering land access, community gardens, bushtucker enterprises, and opportunities for First Nations-led food businesses.

Household size varies across the region, ranging from 2.4 persons in Noosa, reflecting its older population profile, to 2.9 persons in Logan, which has the youngest population in SEQ. More detailed information of household composition was not accessible. Household size influences both food purchasing behaviour and vulnerability to food insecurity. Larger or more complex households (e.g., lone-parent household, group households) face higher food costs and are more likely to experience financial strain, which increases the risk of food insecurity (ABS, 2023a; Foodbank Australia, 2024).

Median weekly household income is highest in Brisbane ($1,284), followed by Redland ($1,046) and the Gold Coast ($1,034), and lowest in Somerset ($799; ABS, 2025b). Across most LGAs, the largest share of households (32–37%) earns between $1,000 and $1,999 per week (ABS, 2025b). However, in Noosa, Scenic Rim, and Somerset, the highest proportion of households (30–32%) falls within the $500–$999 per week income bracket (ABS, 2025b). Income disparities across SEQ mean some households may struggle to afford preferred foods, especially if prices rise, with implications for food security (e.g., Foodbank Australia, 2024).

Overall, the population profile reveals substantial variation in population density, age structure, and household income across the 12 LGAs in SEQ, highlighting the diverse socio-economic landscape of the region and its implication of the regional food system.

### 3.1.4 Migration and ethnicity

There are also notable differences in migration patterns across the 12 LGAs (*Table 2*). The highest net internal (within Australia) migration—calculated as arrivals minus departures in 2024—was recorded in Logan (7,183 people), Moreton Bay (5,830 people), and Sunshine Coast (5,060 people;

ABS, 2025b). In contrast, Brisbane experienced the lowest net internal migration, with a net loss of 4,450 people, indicating that more residents moved out than moved in (ABS, 2025b).

Net overseas migration shows a different pattern. Brisbane (31,427 people) and Gold Coast (11,775 people) recorded the largest gains, while Somerset (118 people) and Scenic Rim (263 people) had the smallest increases (ABS, 2025b).

The proportion of residents born overseas also varies considerably, from 13.5% in Scenic Rim to 31.7% in Brisbane (ABS, 2025b). Across all 12 LGAs, the largest groups of overseas born residents originate from Oceania and North West Europe. Brisbane, however, has a particularly high number of residents born in North East Asia, and Southern and Central Asia.

This ethnic and cultural diversity suggests a culinary diversity that calls for a broad range of food products. For example, the Mediterranean diet of Greek and Italian communities may involve preferences for bread at most meals, proteins like pork, veal, chicken, fish and cold meats, and vegetables like radicchio (bitter lettuce), lettuce, spinach, artichokes, peas, capsicum, tomato, broccoli, broad beans, eggplant, and zucchini. In contrast, a Vietnamese diet may involve preferences for rice at most meals, proteins like pork and chicken, but also duck, and vegetables like spring onions, celery, capsicum, mushrooms, cauliflower, cabbage, onion, Chinese cabbage, Chinese mustard greens, bean sprouts and snow peas (Queensland Health, 2016).

Understanding and responding to the food demands and preferences of culturally diverse populations is essential for both public health and socio-cultural wellbeing (Livingstone et al., 2023). Culturally appropriate foods support healthier eating patterns by aligning with familiar traditions, cooking practices, and dietary norms, which can improve nutrition, reduce chronic disease risk, and strengthen food security (Kumanyika, 2019; Osei-Kwasi et al., 2016). At the same time, recognising diverse food cultures fosters social inclusion, supports cultural identity, and ensures that food environments reflect the needs of all communities (Monterrosa et al., 2020). Responding to the needs of collectivist cultures (e.g., Māori and Pasifika peoples) requires co-design of practical solutions that impact the factors and networks supporting the production and distribution of food (Akbar et al., 2022). When food systems overlook cultural diversity, they risk creating barriers to healthy eating and marginalising groups whose dietary practices differ from mainstream offerings. In addition, the widening of available food supports the broadening of culinary horizons in homes, eateries, food trucks and beyond, adding variety and vibrancy to local food landscapes.

*Table 2* **SEQ migration profile and population ethnicity.**

| INDICATOR | Year | Brisbane | Gold Coast | Ipswich | Lockyer Valley | Logan | Moreton Bay | Noosa | Redland | Scenic Rim | Somerset | Sunshine Coast | Toowoomba |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **MIGRATION** | | | | | | | | | | | | | |
| Internal arrivals (no.) | 2024 | 61,726 | 31,858 | 21,146 | 3,586 | 29,492 | 31,186 | 4,544 | 10,339 | 3,878 | 2,439 | 22,713 | 10,269 |
| Internal departures (no.) | 2024 | 66,176 | 30,733 | 16,838 | 3,100 | 22,309 | 25,356 | 4,362 | 8,621 | 3,401 | 2,299 | 17,653 | 9,623 |
| Net internal migration (no.) | 2024 | -4,450 | 1,125 | 4,308 | 486 | 7,183 | 5,830 | 182 | 1,718 | 477 | 140 | 5,060 | 646 |
| Overseas arrivals (no.) | 2024 | 53,167 | 17,791 | 3,141 | 789 | 6,217 | 7,022 | 1,189 | 2,114 | 385 | 198 | 5,850 | 2,078 |
| Overseas departures (no.) | 2024 | 21,740 | 6,016 | 1,029 | 282 | 2,024 | 2,296 | 397 | 658 | 122 | 80 | 2,062 | 773 |
| Net overseas migration (no.) | 2024 | 31,427 | 11,775 | 2,112 | 507 | 4,193 | 4,726 | 792 | 1,456 | 263 | 118 | 3,788 | 1,305 |
| **ETHNICITY** | | | | | | | | | | | | | |
| Born in Oceania and Antarctica# (excluding Australia) (%) | 2021 | 4.5 | 7.7 | 7.2 | 3.2 | 9.2 | 6.0 | 4.3 | 5.7 | 3.9 | 3.2 | 4.7 | 1.9 |
| Born in North-West Europe (%) | 2021 | 5.6 | 7.4 | 4.3 | 4.3 | 5.0 | 6.8 | 11.4 | 9.5 | 7.0 | 5.1 | 8.7 | 3.0 |
| Born in Southern and Eastern Europe (%) | 2021 | 1.8 | 2.1 | 0.7 | 0.4 | 1.5 | 0.9 | 1.2 | 1.2 | 0.6 | 0.4 | 0.9 | 0.3 |
| Born in North Africa and the Middle East (%) | 2021 | 1.2 | 0.7 | 0.7 | 0.3 | 1.1 | 0.4 | 0.2 | 0.3 | 0.1 | N/A | 0.2 | 2.0 |
| Born in South-East Asia (%) | 2021 | 4.3 | 2.2 | 2.7 | 1.5 | 3.6 | 1.9 | 1.2 | 1.5 | 0.9 | 3.1 | 1.2 | 1.6 |
| Born in North-East Asia (%) | 2021 | 5.7 | 3.2 | 0.7 | 1.8 | 1.7 | 0.9 | 0.5 | 0.9 | 0.6 | 0.5 | 0.7 | 0.8 |
| Born in Southern and Central Asia (%) | 2021 | 4.4 | 1.6 | 2.7 | 1.3 | 3.1 | 1.5 | 0.4 | 0.9 | 0.3 | 0.2 | 1.1 | 2.1 |
| Born in Americas (%) | 2021 | 2.2 | 2.3 | 0.9 | 0.5 | 0.8 | 0.9 | 2.1 | 0.9 | 0.8 | 0.4 | 1.5 | 0.8 |
| Born in Sub-Saharan Africa (%) | 2021 | 2.1 | 1.8 | 1.8 | 0.7 | 1.9 | 1.7 | 1.6 | 2.2 | 0.8 | 0.6 | 1.7 | 1.5 |
| Total born overseas (%) | 2021 | 31.7 | 29.0 | 21.7 | 14.1 | 27.8 | 20.9 | 23.0 | 23.0 | 15.0 | 13.5 | 20.6 | 13.9 |

Notes: Year indicates the most recent year for which population indicator data was available. * Equivalised total household income (weekly) – Census 2021. # Region categories for ethnicity were defined in the ABS data. Next Census will be held in August 2026. Source: ABS (2023b; 2025a).

### 3.1.5 Consumer food expenditure and food security in SEQ

Dietary choices, food sourcing practices, and the structure of the food retail environment shape SEQ's ability to respond to population growth and short-term food system shocks.

This section draws on data from the 2024 National Food Insights Questionnaire (FoodIQ)[1] conducted by Adelaide University, focusing on responses from SEQ households (n=183; representative of population based on age and gender), and the Urban Food Planning Survey (n=499 across SEQ LGAs) conducted in 2021 (Summerhayes and Baker, 2022). Details on both datasets including methods to design and administer the surveys and analyse responses are outlined in Chapter 6.

In 2021, majority of SEQ residents (79%) acquired most of their fresh food from supermarkets (*Figure 8*). This aligns with Australian shopping patterns (ACCC, 2025).

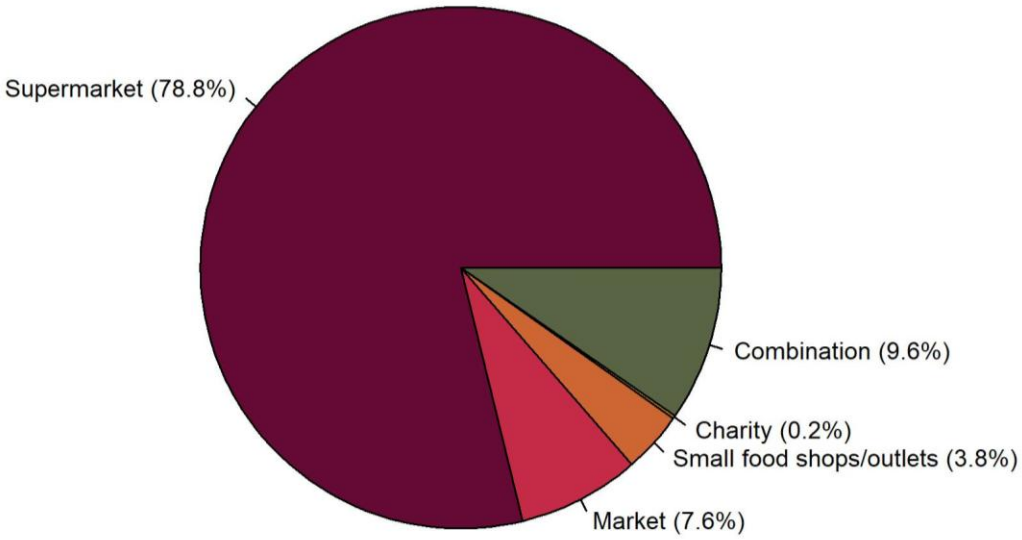



***Figure 8* Share of people that shop for most of their fresh healthy food at different kinds of outlets (N=499).**

Source: Data from Urban Food Planning Survey (Summerhayes and Baker, 2022).

The majority of people reported driving to obtain their food (69%) including most driving to supermarkets (56%; *Figure 9*). The typical length of drive to source food was five to ten minutes (52%), with ten percent usually driving more than ten minutes, and 38% taking a less than five-minute drive.

Ninety percent of Urban Food Planning Survey respondents strongly or somewhat agreed that there was an 'adequate supply of healthy and fresh food (e.g., vegetables and meat)' available near to where they lived. Most (71%) strongly or somewhat agreed that there was an adequate supply of 'culturally relevant and diversified food' available near where they lived, though nine percent somewhat or strongly disagreed. This group were not noticeably concentrated in one LGA, and their

[1] FoodIQ is a recurring online survey of Australian food shoppers conducted by Adelaide University's Centre for Global Food and Resources. Further details are available at: https://bit.ly/FoodIQsurveys

cultural background and religious affiliations were mixed, with no difference from those who agreed the food supply was adequate.

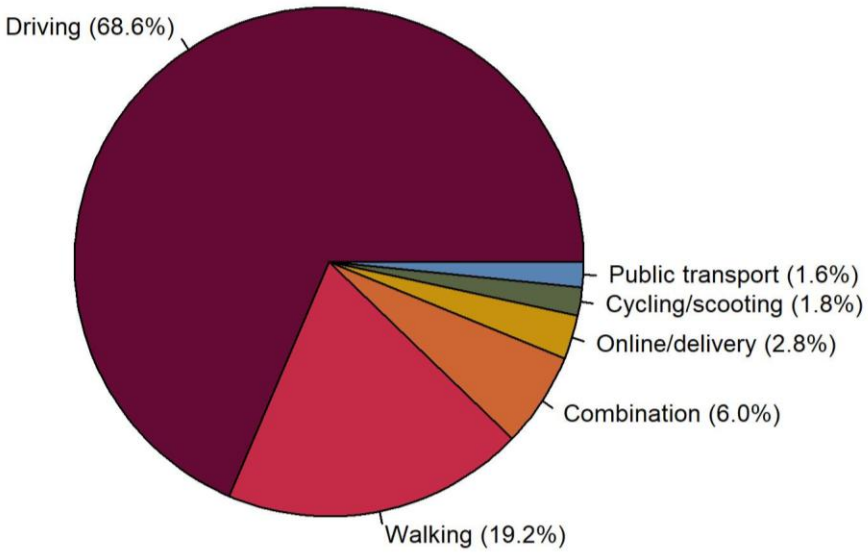



***Figure 9*** **Share of people that predominately use a transport mode to go food shopping (N=499).**

Source: Data from Urban Food Planning Survey (Summerhayes and Baker, 2022).

The SEQ subsample of households from the 2024 Food Insights Questionnaire spent a weekly average of $110 per person on food and beverages for home consumption. The share of expenditure on different key food groups varied, with fresh fruit and vegetables and fresh meat taking up the largest share for most households (*Figure 10*). While spending patterns vary widely between households, alcohol was the only category with a significant difference between households with below and above median household income ($95,000; *Figure 10*). Cultural differences were also evident. For example, households identifying as non-Indigenous Australians allocated a higher share of their food budget to ready meals (fresh or frozen) compared to households of other cultural backgrounds.

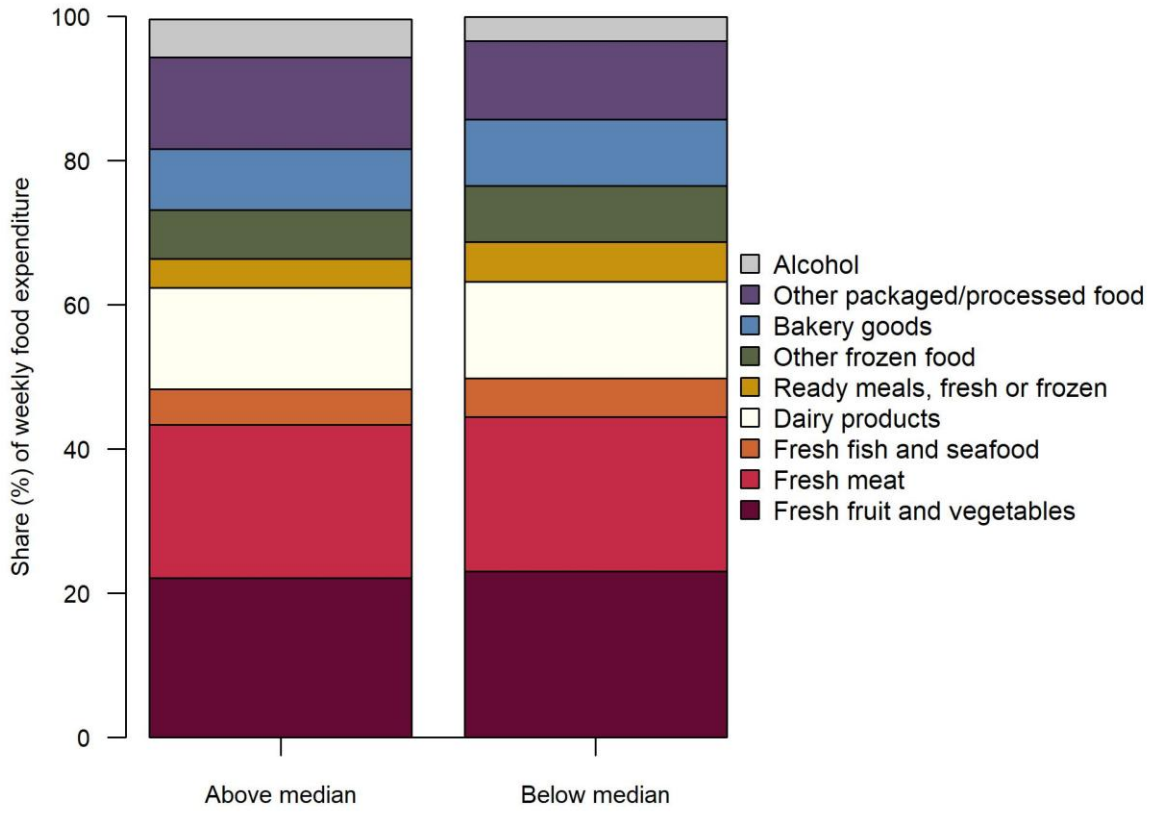



***Figure 10*** **Mean share (%) of weekly household food expenditure for foods to be consumed at home, by different food groups and household income levels.**

Notes: Above median income households (n=61), and below median income households (n=122) were separated based on a median gross household income in Australia of $95,000 from ABS (2023b). Data from Food Insights Questionnaire 2024.

Expenditure on food consumed away from home ranged from $0 to $650 per week, with one outlier reporting $400 per week on dinners (outlier not shown in *Figure 11*). The weekly expense on food consumed at home was only different between households below and above median household income for dinners and alcohol (*Figure 11*). Cultural backgrounds did not significantly influence expenditure on food away from home.

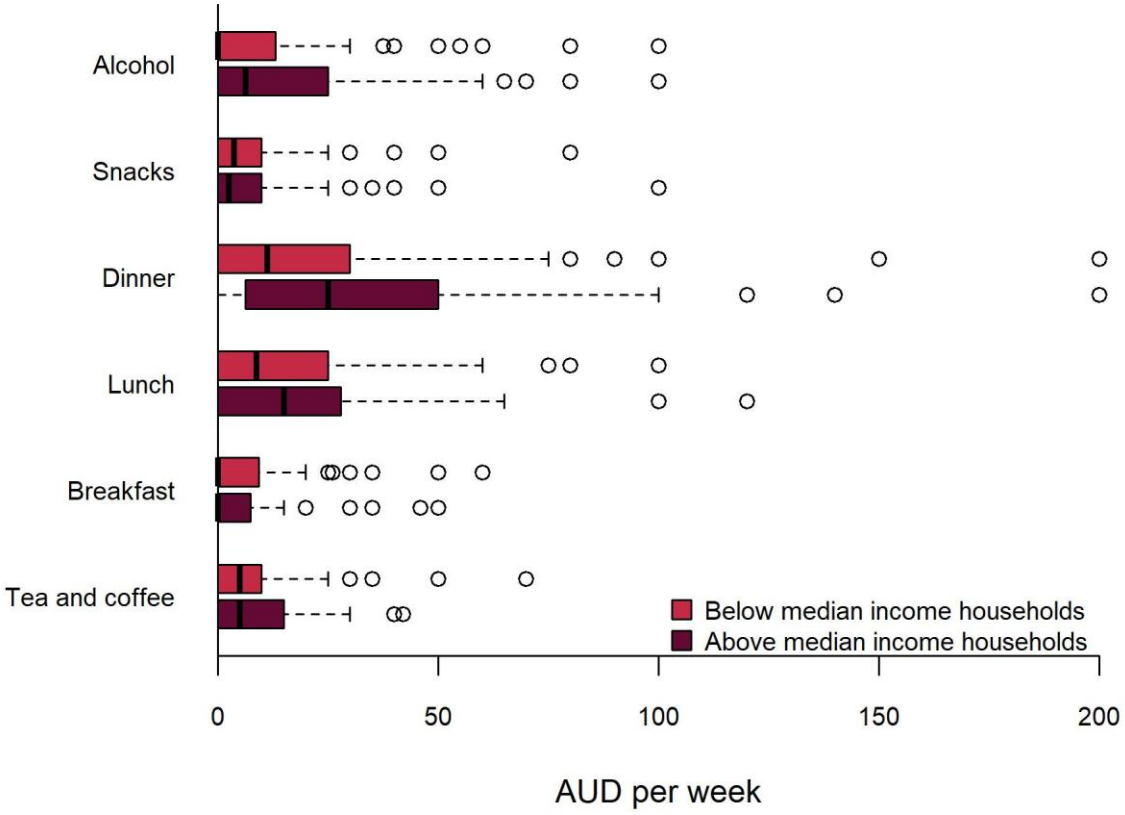



***Figure 11*** **Variation in weekly spend on food consumed away from home, by different meal types and household income levels.**

Notes: Above median income households (n=61), and below median income households (n=122) were separated based on a median gross household income in Australia of $95,000 from ABS (2023b). Data from Food Insights Questionnaire 2024.

Food affordability in SEQ is influenced by, among other things, rising prices for food and non-alcoholic beverages, as reflected in the CPI. These increases have generally tracked inflation for other goods and services (ACCC, 2025). However, greater Brisbane (the capital city area as classified by the ABS, not only the local government area) has recorded a consistently higher CPI for food and non-alcoholic beverages compared to the national average since 2011 (*Figure 12*). At the same time, the greater Brisbane area shows a larger proportion of high-income households and a lower proportion of low-income households in 2021 compared to Australia overall (ABS, 2025a). In response to questions about how food purchasing and consumption patterns have changed in response to cost-of-living pressures in the Food Insights Questionnaire, SEQ households reported adjusting their food habits by reducing meat consumption, eating more vegetables, and planning their meals for several days ahead.

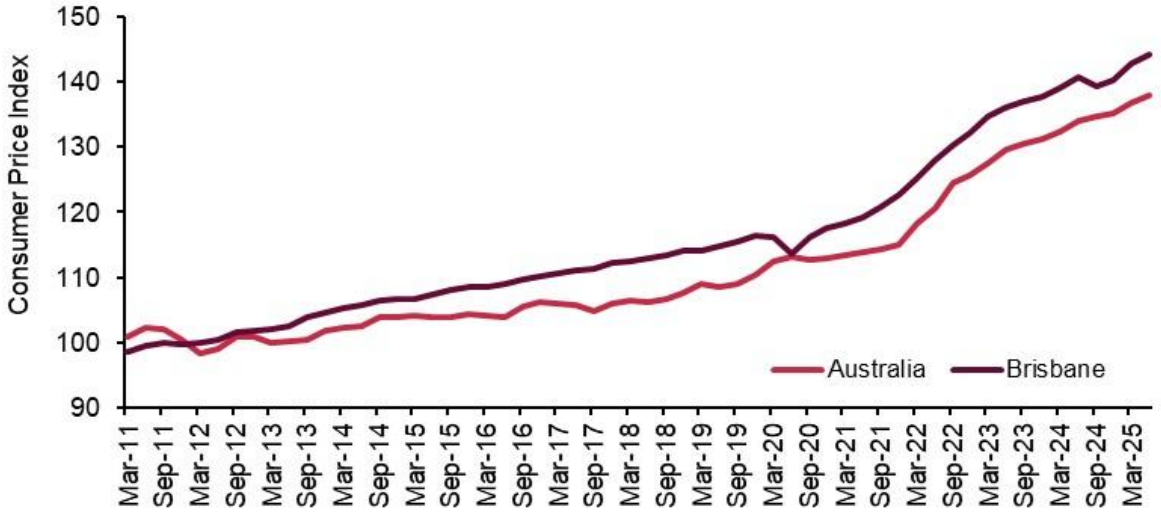



***Figure 12*** **Quarterly Consumer Price Index (CPI) for food and non-alcoholic beverages for Australia and Brisbane since the base year.**

Notes: Base year for CPI is 2011-12 (i.e., 2011-12 is 100.0). Source: ABS (2025a).

Food security is defined as "a situation that exists when all people, at all times, have physical, social and economic access to sufficient, safe and nutritious food that meets their dietary preferences and needs for an active and healthy life" (HLPE, 2020, p. 2). Traditionally, food security has been understood through four core dimensions—availability, access, utilisation, and stability (Clapp et al., 2022) with contemporary frameworks also emphasising sustainability and agency (HLPE, 2020). Using the short form Household Food Security Scale approach to classify household food security status (details in Chapter 6, and specifically *Table 20*), 19% of SEQ households were classified as having low food security and 13% as very low food security, primarily due to an inability to afford balanced meals (*Table 3*). High and marginal food security are grouped given neither indicate hunger, rather marginal food security is characterised by worry or concern about running out of food or limited selections of food (ABS, 2023a).

***Table 3*** **Share of households in SEQ and Australia with different food security statuses, based on the short form of the Household Food Security Scale.**

| Food security status | SEQ Count (%) N=183 | Australia Count (%) N=1185 |
|---|---|---|
| High or marginal food security | 125 (68%) | 920 (78%) |
| Low food security | 36 (19%) | 78 (7%) |
| Very low food security | 24 (13%) | 187 (16%) |

Note: Data from Food Insights Questionnaire 2024.

Households more likely to be experiencing high or marginal food security were those with male and older respondents, higher incomes, and non-Indigenous Australian backgrounds. In contrast, larger households were less likely to be food secure. The statistical analyses underpinning these results are included in Chapter 6.

### 3.1.6 Diet-related health trends

SEQ specific information on diet related health trends is not currently available. However, because SEQ accounts for approximately 74% of Queensland's total population, findings from the Report of the Chief Health Officer Queensland (Queensland Health, 2025) can reasonably be generalised to this region.

Based on measured height and weight in 2022, an estimated 69% of Queensland adults and 33% of children aged 5–17 years were overweight or obese (Queensland Health, 2025). These rates vary substantially across the state, with adults in the most disadvantaged areas 2.3 times more likely to be obese, and children 2.6 times more likely to be overweight or obese, compared with those in the least disadvantaged areas (Queensland Health, 2025). Obesity is a major contributor to Queensland's disease burden, accounting for 8.3% of total burden, particularly through its strong association with type 2 diabetes and cardiovascular disease (Queensland Health, 2025).

Dietary patterns also show significant gaps in meeting recommended intake levels. In 2024, only 45.7% of adults and 69.3% of children met the recommended daily fruit intake, while just 5.8% of adults and 3.1% of children met the recommended vegetable intake (Queensland Health, 2025). Vegetable consumption has continued to decline over time, falling by 35.9% in adults since 2005 and 51.5% in children since 2013 (Queensland Health, 2025). Dietary risks contribute 4.8% of Queensland's total burden of disease, with strong links to heart disease, bowel cancer, and type 2 diabetes (Queensland Health, 2025).

Together, these weight and dietary patterns highlight the need for improved access to affordable fruit and vegetables, targeted nutrition education, and policies that support healthy and equitable food environments in SEQ.

### 3.1.7 Summary

SEQ is home to nearly three quarters of Queensland's population, with rapid growth concentrated in LGAs such as Brisbane, Gold Coast, Ipswich, Logan, Moreton Bay and the Sunshine Coast. The growing and increasingly diverse population is driving higher and more complex food demand, placing pressure on food production, distribution, cold chain capacity, logistics corridors, and retail infrastructure. At the same time, persistent food affordability challenges, rising CPI for food in greater Brisbane, and significant levels of household food insecurity highlight vulnerabilities for low-income and larger households. Diet related health risks remain substantial, with low vegetable intake and high levels of overweight and obesity contributing to chronic disease burden. Together, these demographic and dietary patterns highlight the importance of ensuring equitable access to nutritious, affordable, and culturally relevant foods across the region.

These trends have important implications for policy and markets. Rapid population expansion demands integrated planning that aligns land use decisions with investment in food production, distribution infrastructure and transport networks. Policies supporting affordable, nutritious, and culturally appropriate foods, e.g., through zoning, targeted affordability measures, and public procurement, will be critical for addressing health and equity challenges. A growing and diverse population also creates opportunities for market diversification and new product development. Taken together, these implications point to the need for coordinated, cross sectoral planning to ensure SEQ's food system remains sustainable, equitable and adaptable as the region continues to grow.

### 3.1.8 Knowledge Gaps

Identified knowledge gaps that need to be further explored to inform specific policy levers and investment include:

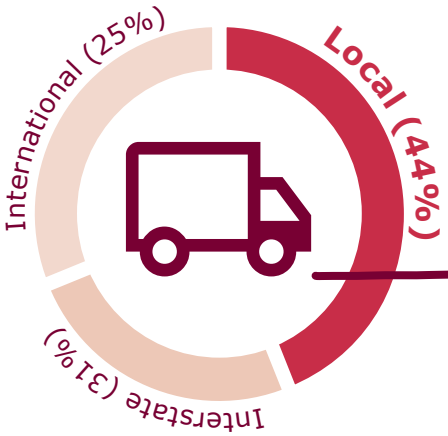
- SEQ-specific consumption data: More comprehensive and up-to-date consumption data by LGA is needed to accurately forecast food demand (including culturally appropriate foods) and target place-based interventions if the market cannot adequately meet dietary requirements. This could include LGA breakdowns of national datasets of supermarket scanner data (Peisker et al., 2021) and food security (ABS 2023a).
- Food affordability and access: There is insufficient mapping of food deserts (e.g., areas with limited access to affordable, nutritious food, including fast-food density), price differentials, and transport access (e.g., private, public) across LGAs. This is needed to identify where price and transport barriers are greatest so policies can be targeted to the communities most at risk of food insecurity.
- Supply chain modelling/mapping: There is a lack of food supply chain scenario modelling/mapping for growth. This is needed to test how population growth and change will shift food supply and demand volumes, cold-chain needs, and logistics requirements to inform investment and contingency planning.
- Health-food system linkages: Links are needed to connect diet-related health risks with practical planning levers (e.g., zoning and procurement) so actions address structural drivers, not just individual behaviour.

SNAPSHOT

# 3.2 Food supply chain

Peggy Schrobback, David Reynolds, Nikki Dumbrell, Andrew Higgins, Cathy Robinson and Maja Arsnic

**63%**
amount of land in SEQ used for agriculture




Where SEQs food comes from

**3%**
total proportion of irrigated land in SEQ

number of food retail outlets in SEQ


**149,354 ha**
the amount of agricultural land lost over the last 25 years in SEQ

**$2.48b**
the value of SEQ's food commodities

## OPPORTUNITIES

- Supporting **regional innovation clustering**
- Understand **critical supply pathways** of each commodity to inform planning and policy
- **Integration of datasets** to address food availability, disaster preparedness and planning

## CHALLENGES

- **Preparedness planning** and management of disruptions to food supply chains
- **Productive carrying capacity** of agricultural land is projected to continue declining
- **Insufficient and poor integration of data** across the food supply chain

This section examines the food supply landscape within SEQ, drawing on secondary data to provide insights into land use and productive carrying capacity, as well as key components of the supply chain, including food production, processing/manufacturing, distribution, and retail. It explores the extent to which SEQ food supply relies on locally produced goods, as well as products sourced from interstate and international markets. The analysis highlights patterns of dependency, supply chain dynamics, and the role of imports in meeting regional demand.

### 3.2.1 Food commodity production in SEQ

> ***We should be treating growth as an opportunity: design cities that support urban agriculture, protect the land we already have, and rethink sprawl so it works for food production and waste reduction, not against it.***
>
> **- Food Connect Forum**

SEQ is a major food-producing region in Australia, characterised by diverse agricultural activities and pronounced regional specialisation. This part provides an overview of SEQ's food commodity production, including land use patterns, productive carrying capacity, production volumes, and economic value. It highlights the key commodities that support the region's food system offering and provides insights into SEQ's role in ensuring food security and economic resilience.

#### Key insights

- About 63% of SEQ's land is used for agriculture, with grazing the primary activity. Toowoomba, Somerset, and Scenic Rim provide the largest agricultural areas, while Lockyer Valley is notable for intensive vegetable production.
- In 2021, SEQ's food commodities were worth approximately $2.48 billion, with livestock slaughter and disposals contributing $925 million and vegetables $567 million.
- SEQ's agricultural land could be regeared to support local plant-based diets but cannot sustain meat-heavy diets without imports. Population growth and urban expansion will further reduce this capacity.

## Land use

In 2024/25, about 63% of the land area in SEQ was used for agricultural purposes (*Table 4*; *Figure 13*). Toowoomba (1,297,632 ha), Somerset (537,367 ha), and Scenic Rim (424,305 ha) are the largest LGAs in the SEQ region and have the most land under agricultural production (*Table 4*). The proportion of land used for agriculture in these LGAs is also notably high: 85% of Toowoomba, 66% of Somerset and 76% of Scenic Rim. Although Lockyer Valley has a smaller total area (226,878 ha), it also has a high proportion of agricultural land use (71%). In contrast, LGAs such as Brisbane, Redland, and Gold Coast have 15% or less of their land used for agriculture. For the remaining LGAs, agricultural land use ranges between 26% and 66%.

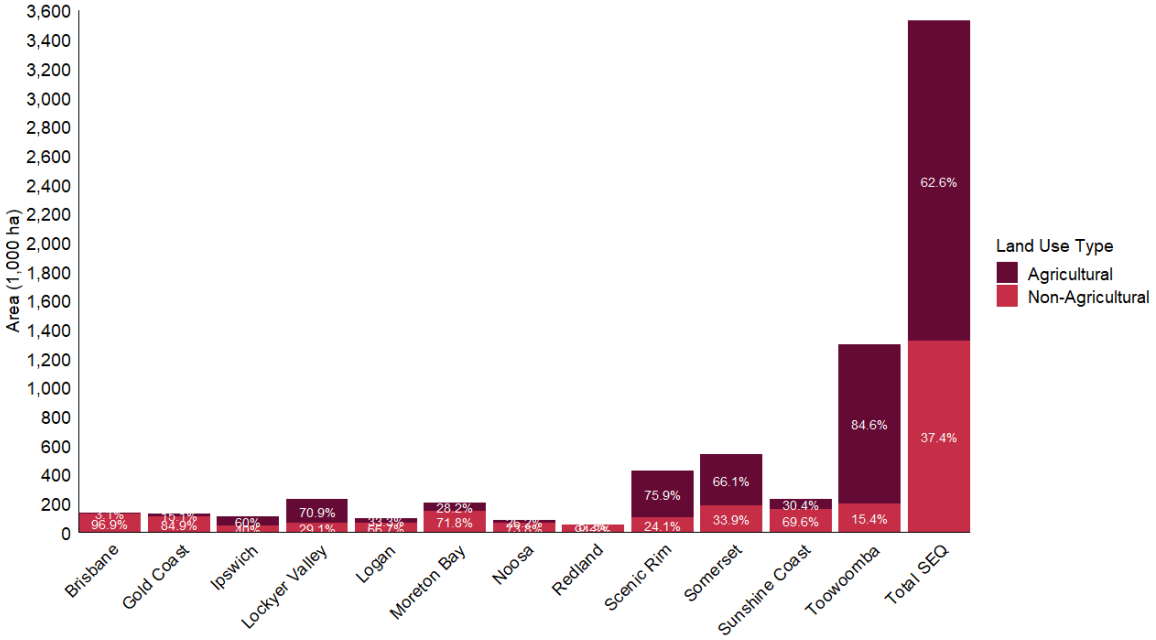



***Figure 13*** **Land area (and share, %) used for agriculture and non-agricultural uses in SEQ. Source: Queensland Government (2025d).**

*Table 4* **Agricultural land use in SEQ by LGA**

| Agricultural land use by LGA | Brisbane | Gold Coast | Ipswich | Lockyer Valley | Logan | Moreton Bay | Noosa | Redland | Scenic Rim | Somerset | Sunshine Coast | Toowoomba | Total SEQ |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Total LGA land area (ha) | 134,677 | 131,611 | 109,372 | 226,878 | 95,787 | 203,901 | 86,983 | 53,671 | 424,305 | 537,367 | 226,397 | 1,297,632 | 3,528,581 |
| Total agriculture area (ha) | 4,124 | 19,939 | 65,656 | 160,749 | 31,866 | 57,420 | 22,828 | 2,815 | 321,853 | 355,126 | 68,899 | 1,098,212 | 2,209,486 |
| Total irrigated land use (ha)# | 81 | 200 | 461 | 12,163 | 488 | 1,699 | 225 | 93 | 9,529 | 4,601 | 2,675 | 27,572 | 59,787 |
| Total prop. of ag. land use | 3% | 15% | 60% | 71% | 33% | 28% | 26% | 5% | 76% | 66% | 30% | 85% | 63% |
| Total prop. of irrigated area (ha)^# | 2% | 1% | 1% | 8% | 2% | 3% | 1% | 3% | 3% | 1% | 4% | 3% | 3% |
| Total prop. of non-ag. land use | 97% | 85% | 40% | 29% | 67% | 72% | 74% | 95% | 24% | 34% | 70% | 15% | 37% |
| Total protected land use (ha)# | 30,913 | 16,434 | 5,710 | 33,463 | 2,723 | 29,253 | 23,679 | 14,808 | 51,895 | 57,234 | 42,554 | 8,584 | 317,250 |
| Total prop. of protected land use# | 23% | 12% | 5% | 15% | 3% | 14% | 27% | 28% | 12% | 11% | 19% | 1% | 9% |
| Vol. water applied to irr. ag. land (ML)# | 1,008 | 758 | 904 | 45,439 | 1,514 | 9,524 | 250 | 412 | 27,264 | 13,991 | 9,067 | 66,892 | 177,023 |

Notes: Prop. for proportion. Ag for agriculture. Vol for volume. Irr. for irrigation. Non-agricultural land use includes residential land use and protected land. Agricultural land area includes non-food production area such as cotton, cut flowers, nurseries. ^ Proportion of irrigated area relative to total agricultural land area. Total protected land includes national parks and reserves. Total proportion of protected land use is the proportion of protected land relative to the total LGA land area. Source: Queensland Government (2025d), ABS (2025b).

The net change in agricultural land area in SEQ by use category between 1999 and 2024 is shown in *Figure 14*. All categories show negative values, indicating an overall decline in agricultural land area across SEQ during this 25-year period. The largest reductions are recorded in grazing native vegetation (-120,678 ha) and cropping (-8,539 ha), both of which experienced substantially greater losses than other land use types. Moderate declines occurred in land in transition and several forms of horticulture and irrigated agriculture. The smallest decreases, represented by very short bars, appear in seasonal horticulture (-44 ha) and grazing irrigated modified pastures (-717 ha). Overall, *Figure 14* highlights that land uses associated with native vegetation and cropping have undergone the most significant contractions, whereas more intensive and irrigated agricultural uses have seen comparatively minor reductions. Across SEQ, the total net loss of agricultural land area over the period was -149,254 ha.

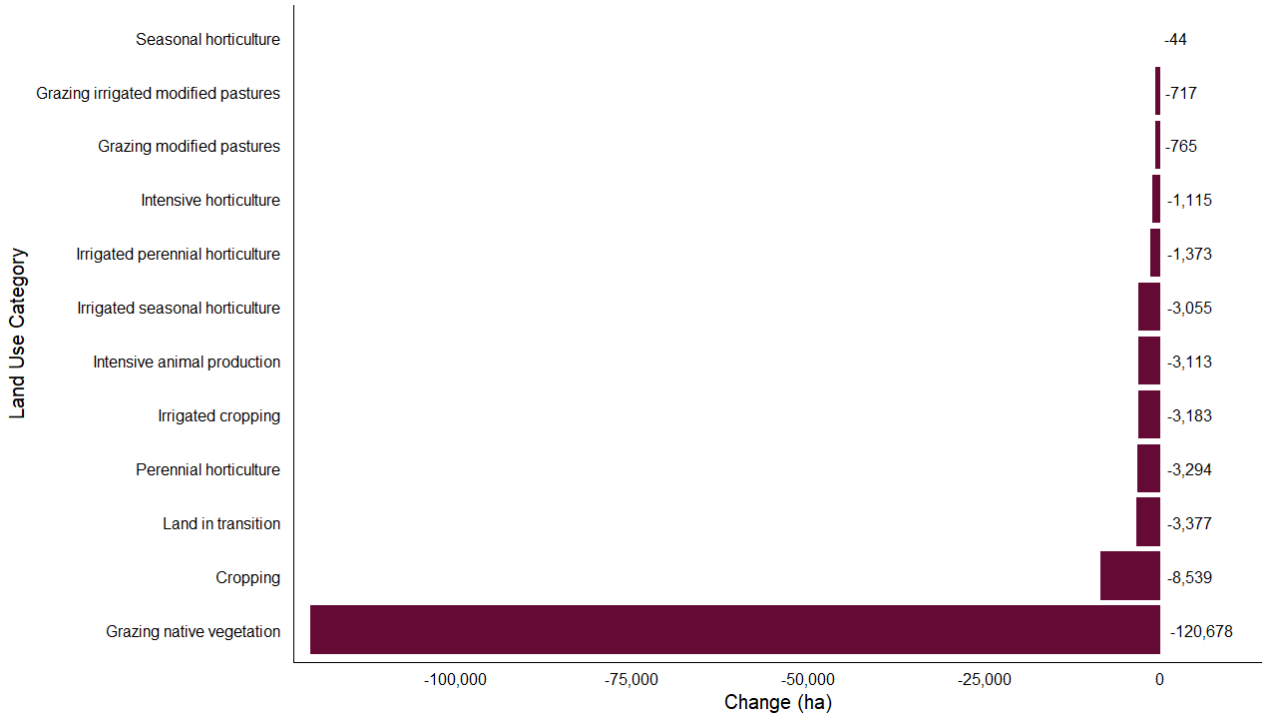



***Figure 14*** **Net change in agricultural land area across SEQ during 1999-2024 Source: Queensland Government (2026a).**

This assessment did not evaluate the quality of current agricultural land and agricultural land lost, such as soil characteristics or biodiversity values that support productive landscapes, nor did it assess areas that may require protection from increasing urban development pressures. However, agricultural land quality remains an important consideration for future regional planning discussions.

## Productive carrying capacity of agriculture land in SEQ

The productive carrying capacity of agricultural land refers to the maximum number of people that can be supported by a given area, based on its productivity and the dietary habits of the population. To apply this concept, the area of productive agricultural land available per person is calculated.

Without factoring in nuanced dietary preferences or sustainability, LGAs such as Scenic Rim and Somerset show the highest current productive carrying capacity in SEQ. This means they have more

agricultural land available per resident (*Figure 15*). In contrast, LGAs like Brisbane, Redland, Logan, Moreton Bay, and Ipswich have a lower productive carrying capacity due to limited agricultural land relative to their population size. In 2024, the overall productive carrying capacity of SEQ was 0.43 hectares per person.

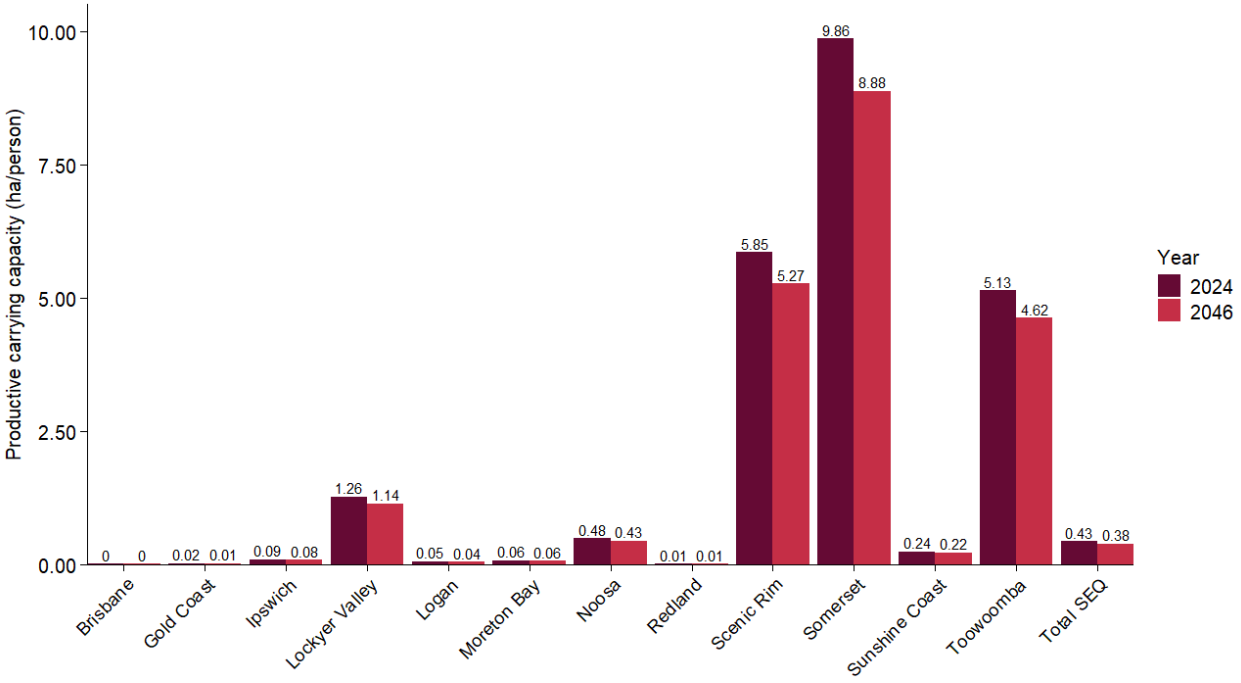



***Figure 15* Agricultural land productive carrying capacity (current and projected).**

Notes: Agricultural land productive carrying capacity based on SEQ population in 2024, population projected for 2046 and agricultural land use in 2024/25. Projected agricultural land use in 2046 was not available, so current land use data were applied. Productive carrying capacity was calculated as: land available per person = total agricultural land (ha) / population (people). Productive carrying capacity shown here for 2046 is likely an overestimate as urban encroachment on agricultural land is not reflected. Technology innovations were not considered for the projections. Sources: ABS (2025b), Queensland Government (2023b).

To put this in context, a typical diet (including grains, vegetables, fruits, and some animal products) requires 0.2 to 0.5 hectares per person per year. A plant-based diet may require as little as 0.10 to 0.2 hectares per person annually. Diets high in meat and dairy can demand 0.5 to 1.0 hectares or more per person, due to land needed for grazing and feed production (e.g., US case study by Peters et al., 2016).

This suggests that while SEQ has enough agricultural land to support a plant-based diet for its population, it cannot support typical or meat-heavy diets without relying on food imports, either from other regions in Australia or internationally. Presently, these imports are essential to ensure balanced diets and food security in SEQ.

Although projections for agricultural land use changes by 2046 are unavailable, population growth will likely reduce the productive carrying capacity from present levels, even assuming current land uses remain unchanged. This projection is based on current practices and does not consider innovative practices, e.g., new technology, that can improve productivity or protected cropping that may reduce land use requirements. Additional declines from the values shown in *Figure 15* are expected in all LGAs, from the conversion of more land from agricultural uses to housing and infrastructure uses.

In summary, SEQ is not self-sufficient as it does not have capacity to feed its population solely from the land currently in agricultural use in SEQ.

## Food commodity volume and value produced in SEQ

An overview of SEQ's food production mix, showing distinct regional specialisation, is presented in *Table 5*. Vegetables account for a large production volume across SEQ, totalling 250,673 tonnes, with the Lockyer Valley (120,192 tonnes). Substantial contributions also come from Scenic Rim (68,063 tonnes), Somerset (24,050 tonnes), Toowoomba (23,081 tonnes), and Gold Coast (5,488 tonnes). Smaller but notable volumes are produced in Redland, Brisbane, Moreton Bay, and Sunshine Coast.

Fruit and nuts production is heavily concentrated in Moreton Bay (31,286 tonnes) and Sunshine Coast (26,727 tonnes), with moderate outputs from Noosa, Lockyer Valley, Scenic Rim, and Brisbane. Overall fruit and nut production across SEQ totals 61,408 tonnes.

Cereal crops (e.g., wheat, sorghum, oats, maize, barley) total 605,178 tonnes, driven overwhelmingly by Toowoomba (95% of production). Smaller quantities are produced across several LGAs including Somerset, Scenic Rim, Moreton Bay, Brisbane, and Ipswich.

Production in the "other crops" category, including pulses, legumes and oil seeds, totals 41,049 tonnes across SEQ. The majority is produced in Toowoomba (35,940 tonnes) and the Scenic Rim (2,022 tonnes) with other LGAs contributing modest or negligible volumes.

Sugar cane is also produced in SEQ, but production is limited to Gold Coast (296,844 tonnes), Sunshine Coast (61,978 tonnes) and Logan (4,448 tonnes).

Livestock production remains diverse across SEQ. For example, meat cattle numbers (heads) total 595,960, with Toowoomba, Somerset, and Scenic Rim the main producing regions. Dairy cattle herds are concentrated in Scenic Rim (15,951 heads), Toowoomba (23,095 heads), and Sunshine Coast (8,913 heads), with a regional total of 60,378 head. Pig production is led overwhelmingly by Toowoomba (137,829 heads), with smaller operations in Lockyer Valley, Moreton Bay, Scenic Rim, and Somerset. Sheep and lamb total 26,958 heads, largely driven by Toowoomba (with 89% of the total).

Poultry production is substantial and widely distributed. Meat chickens total 18.1 million birds, with major production across the Sunshine Coast, Redland, Moreton Bay, Scenic Rim, and Logan. Layer chickens total 4.73 million birds, dominated by Toowoomba (3.97 million), with notable contributions from the Sunshine Coast, Moreton Bay, Logan, and Redland. Egg production for human consumption totals 108.8 million dozen, driven almost entirely by Toowoomba (90% of the total), followed by Moreton Bay, Sunshine Coast, and Redland.

Other livestock production not elsewhere categorised is modest across the region, totalling 32,598 head, with the largest populations in Toowoomba, Somerset, and Scenic Rim.

While Queensland-wide statistics on aquaculture production are available, information specific to SEQ remains limited (Queensland Government, 2025e). However, the sector continues to produce oysters in Moreton Bay (Schrobback et al., 2015), prawns at the Gold Coast (Christofidis et al., 2025), and other aquaculture products. Based on Queensland wide aquaculture statistics (Queensland Government, 2025e), the production volume of aquaculture products in SEQ can be assumed to be relatively low compared with other food commodities.

*Table 5* **Food commodity production volume by LGA (2021)**

| Commodity groups | Brisbane | Gold Coast | Ipswich | Lockyer Valley | Logan | Moreton Bay | Noosa | Redland | Scenic Rim | Somerset | Sunshine Coast | Toowoomba | Total SEQ |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Fruit and nuts (tonnes) | 92 | 53 | - | 140 | - | 31,286 | 1,098 | - | 245 | 33 | 26,727 | 1,734 | 61,408 |
| Vegetables (tonnes) | 939 | 5,488 | 135 | 120,192 | 2,889 | 472 | 323 | 2,323 | 68,063 | 24,050 | 2,720 | 23,081 | 250,673 |
| Cereal crops (tonnes) | 1,461 | 5 | 108 | 6,262 | - | 7,546 | - | - | 7,379 | 3,470 | 427 | 578,519 | 605,178 |
| Other crops (tonnes) | - | 538 | 135 | 604 | - | 665 | - | - | 2,022 | 878 | 268 | 35,940 | 41,049 |
| Sugar cane (tonnes) | - | 296,844 | - | - | 4,448 | - | - | - | - | - | 61,978 | - | 363,270 |
| Dairy cattle (no.) | 1,638 | 264 | 1,177 | 1,783 | 2,116 | 1,863 | 523 | - | 15,951 | 3,054 | 8,913 | 23,095 | 60,378 |
| Meat cattle (no.) | 557 | 2,048 | 6,120 | 14,687 | 2,055 | 12,589 | 3,189 | 722 | 75,218 | 79,972 | 23,181 | 375,622 | 595,960 |
| Pigs (no.) | - | < 100 | < 100 | 6,840 | 190 | 2,017 | < 100 | - | 2,544 | 1,550 | < 100 | 137,829 | 151,005 |
| Sheep and lambs (no.) | 105 | 436 | 56 | 442 | 331 | 76 | < 100 | < 100 | 362 | 203 | 842 | 23,972 | 26,958 |
| Meat chickens (no.) | 200,000 | - | 704,865 | 411,754 | 882,604 | 2,803,632 | 0 | 3,086,604 | 3,531,895 | 1,357,467 | 5,080,898 | 60,932 | 18,120,650 |
| Layer chickens (no.) | 6,215 | - | - | 17,025 | 167,889 | 224,143 | 1,055 | 31,032 | 965 | 62,425 | 252,418 | 3,971,352 | 4,734,519 |
| All other poultry (no.) | - | < 100 | < 100 | 107,711 | - | 102,367 | - | - | 141,953 | 77,364 | 136,279 | 1,166,314 | 1,732,115 |
| Hen egg production for human consumption (dozens) | 99,425 | - | - | 453,997 | 167,829 | 3,802,087 | 20,871 | 594,071 | 19,290 | 1,357,467 | 4,244,735 | 98,026,051 | 108,785,825 |
| All other livestock n.e.c. (no.) | < 100 | 108 | 190 | 981 | 1,196 | 1,371 | < 100 | < 100 | 3,509 | 6,268 | 4,788 | 14,052 | 32,598 |

Notes: Fruit includes strawberries, apples, avocados, bananas, pineapples, pears, nectarines among other. Nuts include almonds and macadamias. Cereal crops include wheat, barley, sorghum, oats, maize. Other crops include pulses and legumes (e.g., chickpeas, lentils), oilseeds (e.g., canola). The composition of commodities groups varies considerable across the LGAs. More recent data disaggregated into LGA level is not available. N.e.c. for not elsewhere categorised. Source: ABS (2022a).

In 2024, the volume of wild-caught fish harvested in marine waters offshore the SEQ coastline was approximately 3,812 tonnes (Queensland Government, 2025e). Data on the exact landing locations is currently not collected and therefore not included in *Table 5*. Wild-caught species harvested include squid, octopus, flathead, mullet, tuna, mackerel, and prawns, among others (Queensland Government, 2025e).

Importantly, not all primary food commodities produced in SEQ are consumed locally. The region both supplies other parts of Australia, export markets and relies on interstate and international imports. Further detail on these distribution patterns and regional dependencies is provided in the section on food distribution and regional reliance below.

While recent gross production value data is available from the Queensland Government (2025d), there are no accessible production volume datasets that align with these value estimates, and the available data only covers brought commodity categories (e.g., no disaggregation into livestock sectors, fruit and nuts, vegetables). Given this limitation, gross production value data from ABS (2022b) were used here to avoid the risk of inadvertent misrepresentation.

In 2021, the total gross value of food commodities produced in SEQ was approximately $2.48 billion, reflecting the region's diverse and substantial agricultural base (*Table 6*; ABS 2022b). This accounts for approximately 17% of Queensland total gross value of agricultural production (ABS 2022b). Livestock-related activities dominate the economic contribution, with livestock slaughter accounting for the largest share at $925 million.

Poultry slaughter is the single most valuable category, totalling $497.1 million across SEQ, driven particularly by Moreton Bay, Redland, Sunshine Coast, Scenic Rim, and Toowoomba. The livestock products milk and eggs (no other food products are reported in this category) add $440.5 million, underpinned by Toowoomba, Scenic Rim, Sunshine Coast, and Logan. Cattle and calf slaughter contributes a further $352.3 million, with Toowoomba, Scenic Rim, and Somerset the leading regions. Pig slaughter contributes $73.4 million, mostly from Toowoomba and Lockyer Valley. Sheep and lamb slaughter and other livestock not elsewhere categorised together contribute $237.6 million and $2.0 million, respectively.

Plant based commodities also play a critical role in SEQ's food economy. Vegetables are the most valuable crop in this category, totalling $567.1 million, with the Lockyer Valley ($324 million) as the dominant producer. Scenic Rim, Toowoomba, and Gold Coast also contribute substantial value. Fruit and nuts contribute $297.3 million, driven by Moreton Bay ($164.0 million) and the Sunshine Coast ($109.5 million), with supporting production from Lockyer Valley and Toowoomba. Cereal crops generate $199.1 million, overwhelmingly dominated by Toowoomba ($189.5 million). "Other crops", including pulses, legumes and oil seeds contribute $33.9 million, with major inputs from Toowoomba and Scenic Rim. Sugar production contributes about $14.9 million to the total gross value of food produced in SEQ.

Overall, the distribution of value highlights the strong reliance of SEQ's agricultural economy on livestock industries, particularly poultry and cattle, complemented by a high value vegetable sector anchored in the Lockyer Valley. Fruit, nuts, cereals, and other crops add important diversity but contribute smaller shares relative to livestock related production. Data on the market value of seafood produced in SEQ remains unavailable.

*Table 6* **Gross value of agricultural production (GVAP) of food commodities produced in SEQ, $ (2021)**

| Commodity categories | Brisbane | Gold Coast | Ipswich | Lockyer Valley | Logan | Moreton Bay | Noosa | Redland | Scenic Rim | Somerset | Sunshine Coast | Toowoomba | Total SEQ |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Fruit and nuts | 2,290,495 | 289,550 | < 1,000 | 2,848,376 | - | 163,984,773 | 6,647,899 | 8,794 | 810,677 | 858,738 | 109,453,876 | 10,086,416 | 297,279,616 |
| Vegetables | 4,092,785 | 37,181,429 | 4,277,715 | 324,016,572 | 8,699,342 | 10,405,978 | 791,116 | 3,925,633 | 85,370,062 | 38,443,278 | 9,203,321 | 40,724,712 | 567,131,943 |
| Cereal crops | 480,460 | 1,985 | 70,317 | 2,275,191 | 3,336 | 2,455,165 | - | - | 2,758,089 | 1,369,284 | 214,392 | 189,497,166 | 199,125,385 |
| Other crops | - | 459,867 | 111,745 | 554,473 | - | 400,199 | - | - | 1,697,780 | 865,377 | 168,363 | 29,697,891 | 33,955,695 |
| Sugar cane | - | 12,256,691 | - | - | 183,667 | - | - | - | - | - | 2,559,071 | - | 14,999,428 |
| Cattle and calves slaughtered | 1,160,859 | 1,261,804 | 4,001,679 | 9,036,769 | 2,224,657 | 7,958,420 | 2,035,548 | 400,571 | 49,599,851 | 45,721,717 | 17,322,847 | 211,610,334 | 352,335,057 |
| Pigs slaughtered | - | 2,477 | 4,802 | 3,325,759 | 92,144 | 980,696 | 8,285 | - | 1,237,068 | 753,589 | 1,269 | 67,013,358 | 73,419,447 |
| Sheep and lamb slaughtered | - | 4,157 | < 1,000 | 3,547 | 4,585 | < 1,000 | < 1,000 | < 1,000 | 3,955 | 1,010 | 12,969 | 204,870 | 237,553 |
| Poultry slaughtered | 4,169,567 | 1,503 | 14,253,088 | 10,847,552 | 21,240,437 | 63,289,881 | 21,337 | 63,037,015 | 74,302,828 | 30,273,748 | 110,592,432 | 105,113,017 | 497,142,404 |
| Other n.e.c. slaughtered | < 1,000 | 6,549 | 11,496 | 59,444 | 72,428 | 83,047 | 5,522 | 1,849 | 212,577 | 379,708 | 290,076 | 851,269 | 1,974,746 |
| Livestock products (milk, eggs) | 3,720,873 | 381,174 | 1,696,485 | 4,259,210 | 18,305,734 | 14,476,032 | 712,337 | 1,770,331 | 28,948,453 | 6,365,220 | 28,661,247 | 331,165,482 | 440,462,579 |
| **Total GPAP** | **15,915,820** | **51,847,186** | **24,427,821** | **357,226,893** | **50,826,329** | **264,034,605** | **10,222,955** | **69,144,858** | **244,941,340** | **125,031,669** | **278,479,862** | **985,964,515** | **2,478,063,853** |

Notes: Fruit includes strawberries, apples, avocados, bananas, pineapples, pears, nectarines among other. Nuts include almonds and macadamias. Cereal crops include wheat, barley, sorghum, oats, maize. Other crops include pulses and legumes (e.g., chickpeas, lentils), oilseeds (e.g., canola). The composition of commodities groups varies considerable across the LGAs. More recent data disaggregated into LGA level is not available. N.e.c. for not elsewhere categorised.
Source: ABS (2022b).

### What is the value of food?

"Value" refers to the importance individuals or groups assign to goods or services, reflecting perceived utility or benefit (Rawluk et al., 2019).

The value of food is often expressed in market terms (e.g., gross value in dollars) because it can be readily quantified using market (price) data. However, relying solely on this narrow market-based measure significantly underestimates the true value (benefits) of food, especially healthy and nutritious food (Bangalang et al. 2022). It can also underestimate the costs of food. The examples below demonstrate that the total value of food exceeds its market value:

- Food is foundational for human existence. Without food, there is no life. Insufficient intake or consumption of unhealthy food leads to malnutrition and chronic diseases, which affect human well-being, productivity, and healthcare costs.
- Food drives economic activity. It creates livelihoods and employment opportunities across farming, processing, distribution, retail, and hospitality sectors. For example, the food industry employs many people in SEQ and contributes substantially to Gross Domestic Product.
- Food has cultural and social significance. Traditional dishes and culinary practices are integral to cultural identity and heritage. Festivals, family gatherings, and rituals often centre around food, reinforcing social bonds.
- Food security underpins national stability. Access to adequate food reduces poverty and restrains social unrest. Conversely, food shortages can lead to migration, conflict, and political instability.
- Food contributes to education and innovation. School meal programs improve learning outcomes, and food science research drives advances in nutrition, biotechnology, and sustainability.
- Food impacts environmental sustainability. Choices about food production and consumption affect land use, water resources, and greenhouse gas emissions, waste, linking food value to planetary health.

This broad perspective on the value of food highlights the importance of food in the context of the SEQ food system. Integrating evident but often overlooked dimensions of food's value – including health, cultural, social, economic, and environmental – into food-related policies and practices can strengthen communities and improve systems and outcomes.

## Knowledge gaps

- Limited aquaculture data: SEQ-specific data on aquaculture production (e.g., species, volume, value), is needed to understand regional capacity, economic contribution, and future development opportunities.
- Seafood distribution uncertainty: Clear data on where seafood is landed (not just caught) and consumed is crucial for assessing regional seafood supply chains and ensuring reliable local access.
- Insufficient current regional and LGA production volume and value data: More frequently collected fine scale production data that reports both volume and value is required to ensure current planning, forecasting, and investment decisions reflect actual conditions.

- Lack of nutritional assessment: Understanding the nutritional value of locally produced and imported food is necessary to assess SEQ's ability to meet dietary needs and guide health aligned food system planning.

### 3.2.2 Food processing and manufacturing in SEQ

Food processing and manufacturing is a critical segment of the supply chain that transforms raw food commodities into processed food products. For example, this includes converting cereals into flour, and milk into cheese, yoghurt, and butter. These processes add value to agricultural outputs and create employment opportunities (see section 3.5), across the region.

#### Key insights

- SEQ hosts a wide mix of processing and manufacturing activities (e.g., abattoirs, dairy processors, chicken processors, breweries, flour mills), with strong geographic clustering across LGAs.
- Toowoomba is the major food processing and manufacturing hub. It contains the largest concentration of large-scale facilities, reflecting its central role in meat processing.
- Food processing and manufacturing underpins resilience and value adding. Processing facilities not only convert raw commodities into higher value products, they support employment, and are considered strategically important for modernisation to protect against climate, trade, and supply chain disruptions.

Although detailed current data on food processing and manufacturing in SEQ is limited, the Transport Network Strategic Investment Tool (TraNSIT; Australian Government & CSIRO, 2025) provides insights into the spatial distribution of food manufacturing businesses across LGAs. *Table 7* presents an overview of the key food processors and manufacturers in SEQ based on the number of businesses recorded in 2023. Notably, this only includes large scale food processors and manufacturers, although information on throughput was not accessible. Data on smaller processors and manufacturers was unavailable.

*Table 7* highlights the diversity and geographic spread of large-scale food processing and manufacturing activities in SEQ. For example, abattoirs are the most common type of facility, with 26 businesses spread across multiple LGAs, particularly Toowoomba (11) and Somerset (5), reflecting the region's strong livestock industry. This strong abattoir concentration likely reflects the concentration of feedlots (livestock fattening as value adding pre-processing stage) in Toowoomba (23 feedlots), indicating its role as a major hub for beef production and supply chain integration. Dairy processors are distributed across several LGAs, with Sunshine Coast hosting the highest number (5), aligning with its dairy farming base. There are relatively few chicken processors in SEQ (6 in total), located in Brisbane, Gold Coast, Ipswich, Redland, Somerset and Toowoomba. Other specialised facilities, such as large-scale flour mills (Brisbane), large-scale breweries (Brisbane and Gold Coast), and large-scale soft drink manufacturers (Ipswich), show both primary and secondary manufacturing activities in the region.

*Table 7* **Overview of major food manufacturer in SEQ (number businesses, 2023)**

| LGAs | Brisbane | Gold Coast | Ipswich | Lockyer Valley | Logan | Moreton Bay | Redland | Scenic Rim | Somerset | Sunshine Coast | Toowoomba | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Abattoir | 1 | - | 2 | 2 | 1 | 1 | - | 3 | 5 | - | 11 | 26 |
| Brewery | 1 | 1 | - | - | - | - | - | - | - | - | - | 2 |
| Chicken processor | 1 | 1 | 1 | - | - | - | 1 | - | 1 | - | 1 | 6 |
| Dairy processor | 2 | 1 | - | - | 1 | 1 | - | 1 | - | 5 | - | 11 |
| Flour mill | 2 | - | - | - | - | - | - | - | - | - | - | 2 |
| Food processor | 2 | - | - | - | - | - | - | - | - | - | - | 2 |
| Soft drink manufacturer | - | - | 1 | - | - | - | - | - | - | - | - | 1 |
| Sugar mill | - | 1 | - | - | - | - | - | - | - | - | - | 1 |
| **Total** | **9** | **4** | **4** | **2** | **2** | **2** | **1** | **4** | **6** | **5** | **12** | **51** |

Source: Australian Government and CSIRO (2025). Notes: Not all food manufacturers are included in this overview, particularly smaller ones. Additional information on smaller food manufacturers located in Brisbane is available from Brisbane City Council (2025). No further information is available on food manufacturers for all other LGAs.

Overall, Toowoomba stands out as the largest food processing and manufacturing hub with 26 businesses, followed by Brisbane (9), underscoring the importance of regional centres in supporting SEQ's food supply chain.

High-value food processing and manufacturing in SEQ is considered a key sector for strategic development to modernise facilities and processes, which can help to protect against disruptions (e.g., climate impacts, global trade volatility; Queensland Government, 2023a). Such investments into the food processing and manufacturing sector also aim to creating employment (see section 3.5), keeping SEQ innovative and competitive in meeting the future food demands of a growing SEQ population.

### Knowledge gaps

- Limited understanding of smaller manufacturers: TraNSIT captures only major facilities for some commodities and other sources are unavailable; smaller processors—such as artisan, multicultural, or niche food producers—are underrepresented, limiting understanding of the true size and diversity of the manufacturing sector.
- Absence of integrated datasets on processing and manufacturing capacity: There is no consolidated dataset capturing manufacturing capabilities, throughput volumes, processing capacity, product lines, or cold chain integration across facilities. This constrains planning for resilience, innovation, and emergency response.
- Limited insight into resilience of processing and manufacturing nodes: There is no holistic stress testing or modelling of manufacturing sites' vulnerability to climate events, energy disruptions, logistics failures, or cyber risks despite their critical role in the regional food supply chain.

## 3.2.3 Food distribution and reliance on other Australian regions and imports

Food distribution broadly refers to the system and processes that move food from where it is produced to where it is ultimately consumed. This section examines the dynamics of food transportation and supply flows involving a) movement of food within SEQ, b) outbound flows from SEQ to other regions in Australia and for export, and c) inbound flows to SEQ from other Australian regions and international imports.

Understanding these food distribution dynamics at a broader scale is critical for assessing the resilience and vulnerabilities of SEQ's food supply system. Such insights help reveal how disruptions in transport networks, logistics operations, or external supply regions may affect food availability. They also support the identification of SEQ's dependencies on interstate and international sources, which is essential for evaluating food security risks, informing emergency planning, and guiding policy development.

For the assessment of these dynamics in the SEQ food systems, the TraNSIT tool (Australian Government & CSIRO, 2025) was used (see Chapter 6 for details). This tool does not capture all food flows in full detail but rather the key transport and supply dynamics in unit of tonnes that are moved within supply chains (e.g., field-distribution centre-retail store or field-mill-refinery-port) depending on the product and destination.

In the absence of any other datasets that comprehensively represent food distribution patterns in SEQ (and Australia), TraNSIT is considered the best available source of evidence for this analysis. Findings from the assessment are outlined in the following section.

***A strong regional food system comes from backing local ones—helping councils connect food to emerging needs, map supply and value chains, and build more circular systems that create local jobs and keep food moving closer to home.***

**- Food Connect Forum**

## Key insights

- Food supply volume is predominantly non-local with 44% of SEQ's retail food supply being produced locally; 56% is sourced from interstate (31%) and international markets (25%).
- Food category dependencies differ, e.g., beverages and "other food" are internationally exposed; grains and dairy are interstate dependent; meat and some fruits and vegetables are locally concentrated.
- About 55% of SEQ production is retained locally, yet sizable volumes, especially grains and meat, service international export markets (27% of total production).
- High local retention of fresh food production suggests cold chain and short haul infrastructure for distribution or warehousing are critical.
- Retail market structure shapes food sourcing and supply strategies.

## Food supply dependencies

Based on an analysis using the TraNSIT tool, a total of about 20 million tonnes (Mt) of food were made available for consumption in SEQ in 2023 (*Table 8*). About 44% of this food volume was produced within the region. A further 31% of SEQ's retail food supply was sourced from other regions across Australia, while 25% was imported from international markets (ABARES, 2020). Among all food categories, beverages constitute the largest volume (4.79 Mt) and are predominantly sourced internationally (59%), while grains form the second largest category (3.85 Mt) and are mostly supplied from other Australian regions (65%). Fruit and vegetables are relatively balanced across sources (40% local, 32% interstate, 28% international), whereas alcoholic beverages (2.41 Mt) and meat (1.77 Mt) are mainly supplied from within SEQ with 61% and 66%, respectively. The high meat supply reflects the finishing at local feedlots and processing conducted in SEQ, not necessarily the origin of the animals which may be sourced from elsewhere.

Sugar is predominantly sourced from within SEQ (70%), while dairy exhibits high interstate dependence (47%) and seafood is mixed (45% local; 33% international). Other food (e.g., rice, flour, bread, milk powder, food oil, discretionary food items such as potato chips) and nuts have a strong import reliance with 44% and 45%, respectively.

These findings suggest the presence of diversified sourcing which enhances resilience but also creates distinct dependencies. For example, the spread of food supply across local, interstate, and international sources reduces the risk of localised shocks, e.g., weather events or disease outbreaks, causing immediate shortages. However, categories like beverages and other food, with large international shares (indicating they can achieve scale to be profitable) are more exposed to global logistics disruptions and exchange rate volatilities while grains and dairy depend heavily on the smooth operation of interstate freight corridors and cold chain capacity.

*Table 8* **Origin of food products supplied in SEQ (in tonnes).**

| Food categories | Produced in SEQ (local supply) | | From other Australian regions (interstate) | | From international markets (imports) | | Total tonnes supplied to SEQ |
|---|---|---|---|---|---|---|---|
| | Tonnes | Share | Tonnes | Share | Tonnes | Share | |
| Alcoholic beverages | 1,469,872 | 61% | 507,772 | 21% | 430,236 | 18% | 2,407,880 |
| Beverages | 1,580,090 | 33% | 408,360 | 9% | 2,806,415 | 59% | 4,794,865 |
| Dairy | 1,061,065 | 52% | 966,468 | 47% | 27,372 | 1% | 2,054,905 |
| Fruit & vegetables | 1,054,188 | 40% | 837,383 | 32% | 745,002 | 28% | 2,636,573 |
| Grains | 1,265,465 | 33% | 2,486,195 | 65% | 95,487 | 2% | 3,847,147 |
| Meat | 1,166,628 | 66% | 510,669 | 29% | 95,765 | 5% | 1,773,062 |
| Nuts | 11,922 | 22% | 17,430 | 33% | 23,758 | 45% | 53,110 |
| Other food | 568,396 | 35% | 328,778 | 20% | 712,099 | 44% | 1,609,274 |
| Seafood | 78,973 | 45% | 39,166 | 22% | 56,903 | 33% | 175,043 |
| Sugar | 474,674 | 70% | 122,013 | 18% | 78,391 | 12% | 675,078 |
| **Total** | **8,731,274** | **44%** | **6,224,234** | **31%** | **5,071,429** | **25%** | **20,026,936** |

Source: Australian Government and CSIRO (2025). Notes: Other food includes rice, flour, bread, milk powder, food oil, eggs, discretionary food items such as potato chips. Food volume presented in the table represents all movements measured in tonnes of food from origin (e.g., farm) to distribution centres and distribution centres to supermarkets. Number of nodes within a supply chains depends on the food product. Hence, double counting of tonnages is likely. This explains why the distribution volumes for commodities such as fruit, nuts, vegetables, grains, seafood, etc. in *Table 13* exceed the production volumes for the same commodities in *Table 10*. For example, large grain handling facilities located within the SEQ boundary receive substantial volumes of grain from LGAs west of Toowoomba (outside the SEQ region). As a result, much more grain is transported within SEQ than is produced within SEQ. Trips originating from these facilities move to ports, stockfeed manufacturers, flour mills and other processing destinations. Disaggregating these flows would require additional modelling work. Tonnages can also vary significantly between calendar year and financial year datasets, especially for fruit, nuts, vegetables and grains. Therefore, comparing ABS (2022a) production volume data with 2023–2024 TraNSIT data is not appropriate. Disaggregation of flows from distribution centres into local supply, interstate and imports requires further analysis. Therefore, proportions presented in this table are only indicative of the food source dependencies.

Local strengths suggest targeted self-sufficiency opportunities. High local shares in meat indicate relative self-reliance and may offer leverage points for emergency provisioning or strategic stockholding within SEQ if storage capacity, specifically for cold storage, exists. Conversely, the import heavy profile of nuts and the international share in fruit and vegetables point to categories where contingency planning, supplier diversification, or seasonal substitution strategies could reduce vulnerability. For such planning, detailed information on the volumes of different product storage formats (e.g., tinned, frozen, fresh vegetables) is required, as some formats have considerably longer shelf lives than others and should be incorporated into contingency projections. While data on different storage product formats (e.g., frozen, canned, fresh) is available, it has not yet been integrated into TraNSIT for analysis.

Given these findings, planning and policy should be product specific. Since the supply risk profile varies by food category, e.g., international exposure (beverages, other food, nuts), interstate dependence (grains, dairy), or local concentration (meat), infrastructure investment, emergency logistics planning, and industry support should be tailored to each category's dominant supply pathway. In addition, consideration of the importance of maintaining access through a disruption to

different foods currently dependent on longer supply chains can guide action priorities, e.g., distinguishing between imports that meet dietary necessities and those that meet taste preferences.

## Flows of food produced in SEQ

It is equally important to consider how SEQ produced food supports demand across Australia and in international markets. Using TraNSIT data (Australian Government & CSIRO, 2025), indicative flow dynamics were derived to illustrate how SEQ produced food is distributed.

The results in *Table 9* show that that about 55% of food volume produced in SEQ remains in the region, 17% moves interstate, and 27% is exported. International exports are driven by grains (62%) and meat (42%), while dairy (80%), seafood (77%), and beverages (76%) are largely consumed locally. Nuts (55% interstate), fruit and vegetables (26% interstate), and other food (25% interstate) indicate strong interstate trade linkages. Overall, SEQ both supplies its population and contributes to national networks and export markets.

Further detail on commodity value, seasonal variability of flows, distance, travel time, transport emissions, transport modes (air/sea/road) and LGA-level disaggregation can be derived from TraNSIT data, but this was outside the scope of the current assessment.

It is also important to note that SEQ's food dependencies and contributions to other regional food systems compare with those of other Australian regions remains unclear, as no equivalent analyses have yet been undertaken. Incorporating food-miles and carbon-intensity assessments into future work would provide an additional sustainability lens to inform food-dependency and resilience strategies.

***Table 9* Flows of food produced in SEQ.**

| Food categories | Remaining in SEQ | | To other regions in Australia (interstate) | | To international markets (export) | | Total tonnes originating in SEQ |
|---|---|---|---|---|---|---|---|
| | Tonnes | Share | Tonnes | Share | Tonnes | Share | |
| Alcoholic beverages | 1,469,872 | 65% | 618,387 | 27% | 167,316 | 7% | 2,255,575 |
| Beverages | 1,580,090 | 76% | 443,102 | 21% | 53,448 | 3% | 2,076,640 |
| Dairy | 1,061,065 | 80% | 266,200 | 20% | 1,190 | 0% | 1,328,455 |
| Fruit & vegetables | 1,054,188 | 67% | 405,960 | 26% | 118,771 | 8% | 1,578,919 |
| Grains | 1,265,465 | 28% | 431,983 | 10% | 2,774,857 | 62% | 4,472,306 |
| Meat | 1,166,628 | 50% | 192,727 | 8% | 980,469 | 42% | 2,339,823 |
| Nuts | 11,922 | 41% | 15,863 | 55% | 992 | 3% | 28,777 |
| Other food | 568,396 | 59% | 237,743 | 25% | 160,380 | 17% | 966,520 |
| Seafood | 78,973 | 77% | 21,643 | 21% | 1,583 | 2% | 102,199 |
| Sugar | 474,674 | 78% | 117,547 | 19% | 17,690 | 3% | 609,911 |
| **Total** | **8,731,274** | **55%** | **2,751,155** | **17%** | **4,276,696** | **27%** | **15,759,125** |

Source: Australian Government and CSIRO (2025). Notes: See notes provided below *Table 8* which also apply here.

SEQ nonetheless plays a significant national and international role: over half of locally produced food is consumed within the region, with 17% transported interstate and 27% exported. This emphasises the need to monitor shifts in global food demand, emerging markets, dietary trends and trade

uncertainties to position SEQ's strengths and vulnerabilities within a broader strategic development context.

### Knowledge gaps

- Limited real time data on distribution network performance: There is no integrated, real-time dataset tracking how food moves across SEQ's retail, wholesale, and logistics networks, limiting the ability to detect emerging bottlenecks, stockouts, or infrastructure failures during disruptions.
- Gaps in visibility of retailer-controlled supply chains: Major supermarket chains hold detailed data on routing, volumes, cold chain performance, and distribution centre dependencies, but these datasets are commercially restricted. This limits government's capacity to assess systemic risks or plan coordinated emergency responses.
- Lack of evidence on critical node dependencies: Key distribution centres, wholesale markets, and transport corridors or scenario modelling to assess how failures cascade across food categories.
- No integrated modelling of multi-hazard disruption scenarios: The food distribution system has not been comprehensively modelled under compound events (e.g., flood + freight corridor closure + fuel shortage), limiting preparedness for real world shocks.
- Insufficient mapping of storage and buffering capacity (volume and maximum duration): There is no regional view of stockholding capacity (ambient, chilled, frozen) across supermarket, distribution centres, wholesalers, ports, or independent retailers, constraining emergency food security planning.

## 3.2.4 Food retail in SEQ

Food retail refers to businesses that sell food products for off-premises consumption, including supermarkets, grocery stores, convenience stores, specialty food shops, farmers' markets, and online food delivery platforms. As the final link between producers and consumers, food retail provides distribution and availability, aggregates demand information, influences price formation (via procurement, promotions, and product positioning), and maintains quality and safety standards. Retailers also collect rich consumer data (behaviour, preferences, purchasing trends), optimise inventory and logistics to minimise waste, and often possess the most comprehensive view of food availability and demand across a region.

### Key insights

- Retail concentration mirrors population patterns: SEQ's food retail network is heavily concentrated in more populated LGAs, e.g., Brisbane, Gold Coast, Sunshine Coast, while LGAs with smaller populations tend to rely more on independent grocers.
- Diverse retail formats contribute to both resilience and complexity: While Coles and Woolworths dominate the sector, the presence of ALDI, independent chains, and specialty retailers broadens food retail access but complicates logistics, especially for cold chain coordination and emergency planning.

- Population per outlet ratios indicate potential access and equity gaps: Ratios range widely (e.g., 2,019 people per outlet in Somerset vs. 4,147 in Moreton Bay), highlighting areas where residents may face reduced retail access, with implications for health, transport planning, and regional development.

Data on the count of food retail outlets in SEQ is provided in *Table 10* (Australian Government & CSIRO, 2025). Brisbane has by far the largest number of food retail businesses (468), followed by Gold Coast (219), Sunshine Coast (130), Moreton Bay (123), Logan (102), and Toowoomba (80). LGAs such as Somerset (13) and Scenic Rim (19) have fewer outlets, reflecting lower population density. Across SEQ, the total number of listed food retail businesses is 1,315. Coles and Woolworths together account for 286 outlets across SEQ (Coles 159, Woolworths 127). Importantly, retail outlets vary in size and food product range which is information not available for current analysis.

Brisbane hosts the most Coles (60) and Woolworths (40) stores; Gold Coast is second (Coles 34, Woolworths 18). ALDI operates 97 outlets regionwide, with concentrations in Brisbane (31) and Gold Coast (18).

IGA is the largest independent retailer listed (182), with a strong presence in Moreton Bay (28), Sunshine Coast (30), Brisbane (46), and Gold Coast (25). FoodWorks (90) and SPAR (53) add further independent coverage, often in suburban and peri urban areas.

The “other grocery” category (518) is substantial, indicating a wide base of smaller grocers, delis, ethnic supermarkets, specialty produce shops, and niche retailers. “Other convenience” (28) captures non-banner convenience outlets (corner shops), with notable counts in Toowoomba (12) and Somerset (5). The Friendly Grocer brand (61) shows pockets of presence across Brisbane (18), Moreton Bay (11), Redland (8), and Sunshine Coast (7).

The diversity of food retail formats, from large supermarkets to small specialty shops spreads risk across different business models and supply sources, somewhat reducing vulnerability to disruptions. However, it also introduces complexity from a logistical perspective, e.g., many operators, more frequent consignments to be moved within the system. For example, smaller shops often require more frequent deliveries in smaller volumes, while large chains demand high-capacity cold-chain infrastructure. Coordinating these varied needs during normal operations and emergencies (e.g., floods, heatwaves) makes planning and disaster preparedness more challenging.

The average population size served per total number of food retail outlets in the SEQ LGAs ranges from 2,019 people in Somerset (the lowest—indicating higher outlet availability relative to population) to 4,147 in Moreton Bay (the highest—indicating fewer outlets relative to population). Large urban LGAs rank midrange, for example: Brisbane with 2,828, Gold Coast with 3,042, Logan with 3,703, Sunshine Coast with 2,815, and Toowoomba with 2,273. The differences may indicate outlets of various sizes.

The highest spatial densities of supermarkets exist in Brisbane (0.347 per hundred square kilometres), followed by Gold Coast (0.166), Redland (0.116), and Logan (0.106). These LGAs have the most supermarkets per unit of total land area. In contrast, the lowest density of supermarket per unit of land area is recoded for Lockyer Valley (0. 007), Toowoomba (0. 006), Scenic Rim (0. 004), and Somerset (0. 02) which is typical of LGAs with a high total land area where towns are dispersed.

*Table 10* **Food retail outlets by LGA (2023)**

| | Brisbane | Gold Coast | Ipswich | Lockyer Valley | Logan | Moreton Bay | Noosa | Redland | Scenic Rim | Somerset | Sunshine Coast | Toowoomba | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Aldi | 31 | 18 | 8 | 1 | 8 | 14 | 1 | 3 | 1 | - | 9 | 3 | 97 |
| Coles | 60 | 34 | 8 | 2 | 15 | 14 | 1 | 4 | 1 | - | 13 | 7 | 159 |
| Foodworks | 34 | 5 | 2 | 1 | 7 | 7 | 1 | 9 | 4 | - | 14 | 6 | 90 |
| Friendly grocer | 18 | 4 | 3 | - | 7 | 11 | 1 | 8 | - | 1 | 7 | 1 | 61 |
| IGA | 46 | 25 | 8 | 4 | 14 | 28 | 4 | 8 | 4 | 3 | 30 | 8 | 182 |
| Other convenience | 1 | 1 | - | 3 | - | - | 2 | 1 | 2 | 5 | 1 | 12 | 28 |
| Other grocery | 219 | 102 | 24 | 5 | 35 | 27 | 8 | 20 | 5 | 3 | 42 | 28 | 518 |
| SPAR | 19 | 12 | | - | 2 | 6 | 1 | 2 | 1 | - | 2 | 8 | 53 |
| Woolworths | 40 | 18 | 9 | - | 14 | 16 | 2 | 7 | 1 | 1 | 12 | 7 | 127 |
| Total | 468 | 219 | 62 | 16 | 102 | 123 | 21 | 62 | 19 | 13 | 130 | 80 | 1315 |
| Ave. population size served by food retailers* | 2,828.0 | 3,041.6 | 4,050.1 | 2,740.4 | 3,703.2 | 4,146.9 | 2,779.6 | 2,690.3 | 2,381.3 | 2,019.0 | 2,814.9 | 2,272.6 | 3,054.5 |
| No. supermarkets Per hundred km$^2$ | 0. 347 | 0. 166 | 0. 057 | 0.007 | 0. 106 | 0.060 | 0.024 | 0. 116 | 0. 004 | 0.002 | 0.057 | 0.006 | 0.037 |

Source: Australian Government and CSIRO (2025), ABS (2025b), Queensland Government (2025d). Notes: Ave. for average, No. for number. Average population size served food retailers was derived by dividing population size in each LGA (in 2024) by the total number of food retail businesses at each LGA. No. of supermarkets per km². was calculated as grant total of supermarket in a LGA divided by total LGA land area (square kilometres). See *Table 8* for data on total LGA land area (ha), which was converted to square kilometres using 1 ha = 0.01 km².

It should be noted that the simple ratios used in *Table 10* as an indicator of food access do not account for visitor flows, cross-boundary shopping, store size or format, or e-commerce activity. Spatial density of supermarkets is not the same as food accessibility for residents. Nevertheless, presented ratios provide an initial perspective on generic retail access and potential pressure points. A more robust assessment of food equity and access requires combining spatial density with population distribution, settlement patterns, and travel time to stores.

> ***To meet the growing demand for local food, we could lean more on community organisations to advocate, share knowledge, and help build stronger links between consumers and local producers.***
>
> **- FAN Forum**

In summary, food retail in SEQ is concentrated in high population LGAs such as Brisbane, Gold Coast, and Sunshine Coast, while less populated LGAs rely heavily on independent grocers for services to consumers. Tourist regions show strong outlet density, supporting seasonal demand and offering opportunities to promote local food culture. These patterns have implications for health, transport and infrastructure planning, and regional development strategies.

Knowledge about retail operations and consumer-facing food environments is essential for effective food system governance. During system shocks, such as droughts, floods, cyclones or animal disease outbreaks, retail dynamics can strongly influence food security, which is a public good and therefore an area where government intervention may be required. In addition, understanding the supply of discretionary foods (e.g., high in added sugars, saturated fats, salts) within retail settings, as well as how these products are promoted, provides an important evidence base for public health initiatives aimed at shifting diets toward more nutritious and healthy options. Consequently, relying solely on the private retail sector to manage food supply and distribution that influence food security and public health outcomes carries risks that can have substantial public costs.

## Knowledge gaps

- Limited visibility of store characteristics, capacity, and product range: There is no comprehensive dataset detailing which retail outlets stock fresh, specialty, or culturally specific foods, nor their cold chain or storage capabilities. This limits government's ability to plan for nutrition access, identify retail deserts, or coordinate emergency food distribution.
- Insufficient understanding of consumer behaviour and demand patterns: Retail scanner data and insights on cultural food preferences, purchasing trends, and seasonal demand are not readily accessible. This constrains the design of local food strategies, diet and health promotion initiatives, and tourism or hospitality offerings that depend on understanding community food habits.
- Lack of price transparency across retail supply chains: Limited visibility of retail margins, price formation, and affordability restricts the ability to monitor market power, and develop targeted cost of living responses.
- Gaps in information on healthy vs. discretionary food availability by neighbourhood: There is no integrated mapping of fresh food access, the density of discretionary or fast-food outlets, or

their proximity to schools and community hubs. This limits evidence-based planning to align the retail environment with public health and nutrition goals.

### 3.2.5 Food services in SEQ

Food services in SEQ encompass a broad range of establishments that prepare and serve food for consumption on-site. These include restaurants, cafés, bakeries, catering businesses, and other hospitality venues. Publicly accessible data describing the food service landscape is limited across SEQ. Only data from the Brisbane City Council on its food safety permit dataset could be accessed for this analysis.

*Figure 16* illustrates the range of food service establishments within the Brisbane LGA, as captured through this permitting process (Brisbane City Council, 2025). The figure highlights both the number of food businesses operating across Brisbane LGA and the variation in service types represented in the dataset.

A spatial examination of these data can provide opportunities to identify key patterns, such as areas with high concentrations of food services, the mix of food service categories within different neighbourhoods, and potential clusters of hospitality activity. Such insights can support broader analysis of economic activity, accessibility of services, and urban planning considerations.

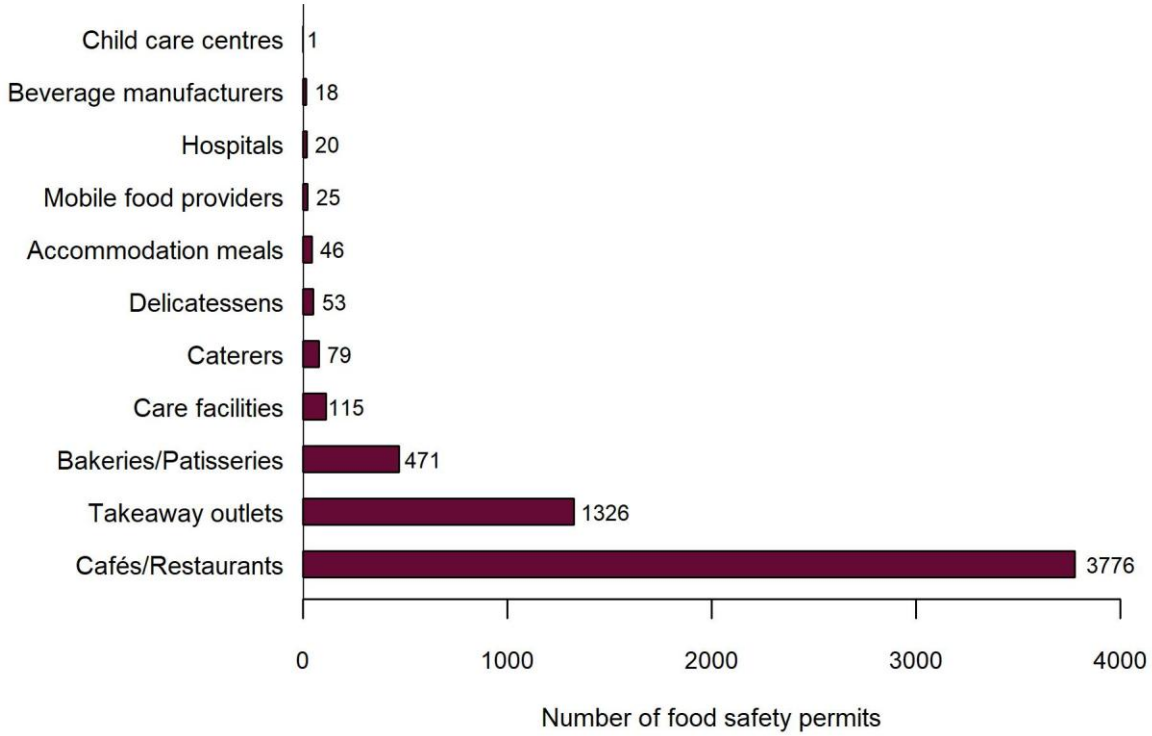



***Figure 16* Food service landscape in Brisbane. Based on food safety permit data from Brisbane City Council (2025).**

## Knowledge gaps

- Councils hold food safety permit data that could be used to map their food service environment: There is currently no publicly available dataset capturing the full range of food service types (e.g., cafés, bakeries, hospitals, mobile vendors, takeaways) for all LGAs, their cuisine profiles, or

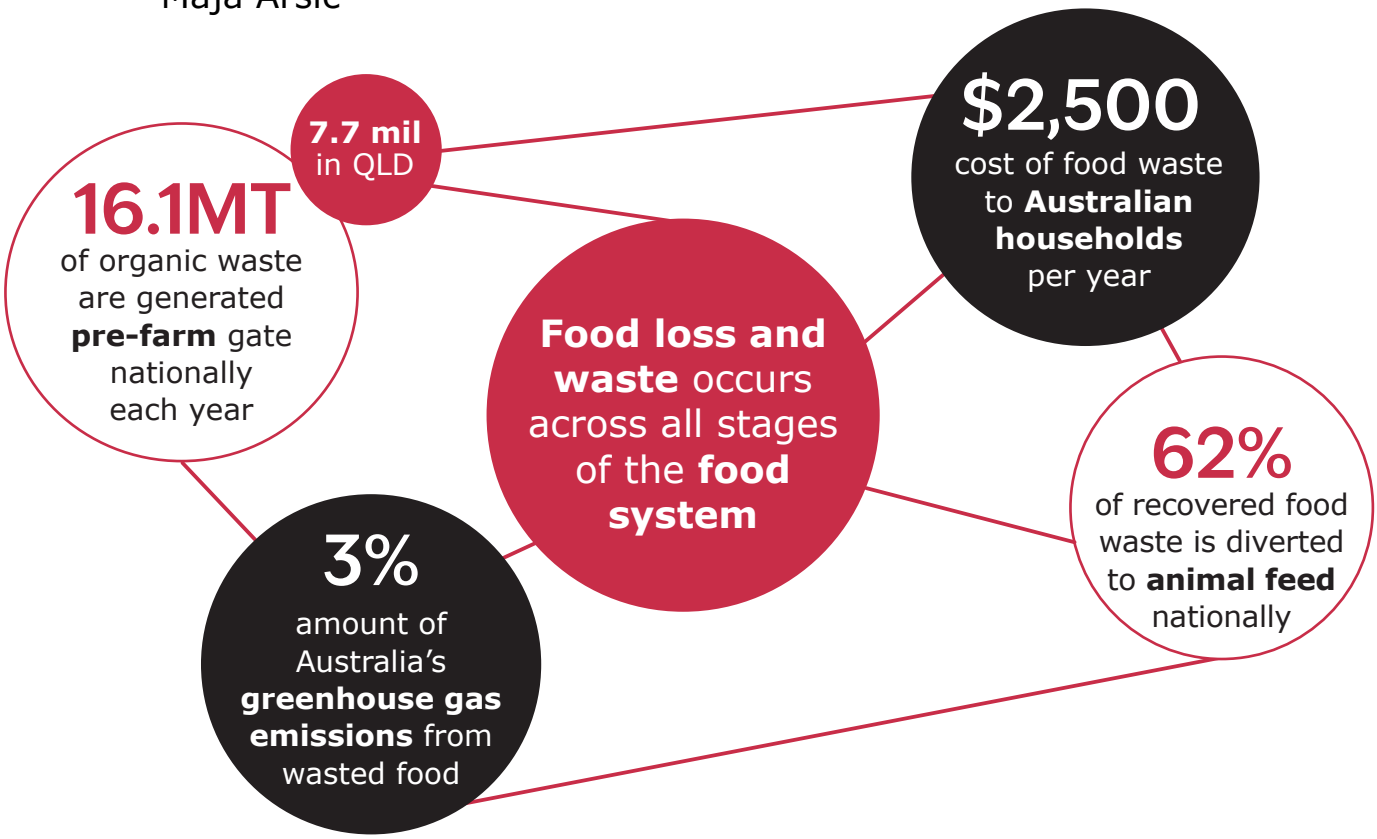
locations. This constrains the ability of councils to assess, compare and plan for local food environments.

- Absence of spatial food service diversity information: There is no consolidated map of culturally diverse cuisines, healthy vs. discretionary outlets, or the distribution of independent vs. chain operators, reducing visibility of service gaps and opportunities for targeted planning.
- Poor integration of regulatory and consumer datasets: Permit and licensing data, consumer demand insights, and information on retail diversity are not aligned, limiting the ability to assess accessibility and the alignment of food environments with community needs.
- Limited insights into socio-economic disparities in food access: There is inadequate understanding of how low-income households interact with the food service ecosystem, including reliance on takeaway food, cost barriers, and travel burdens to reach healthier or culturally relevant options.
- Insufficient evidence on workforce capacity and skills: Little is known about local labour shortages, training requirements, and future skill needs across different precincts, despite clear variation between inner city areas and outer suburban LGAs.

SNAPSHOT

# 3.3 Food loss and waste

Maja Arsic




## Why does food loss and waste occur?

- Weather variability
- Consumer preferences & behaviour
- Strict market appearance standards
- Supply chain disruptions
- Harvesting damage
- Pests and diseases

## OPPORTUNITIES

- **Circular food solutions** including food, feed, fibre, bio-products and bio-energy
- **Improve data** quality and capture across food system waste streams
- **Support initiatives targeting** behaviour change and service innovation

## CHALLENGES

- Up to **30% of household waste** in SEQ is food organics waste, a large portion of which ends up in **landfill**
- Need for increased local and regional processing capacity for recycling household organic waste
- Managing food waste past the point of distribution is complex

Food loss and waste (FLW) across SEQ's supply chains poses a critical challenge for food system resilience, while also presenting opportunities for innovation. FLW occurs across all stages of the value chain, from production to consumption, by households and institutions. Nationally, an estimated 16.1 million tonnes of organic waste are generated pre-farm gate in agriculture, fisheries and forestry industries, largely by horticulture, broadacre and livestock sectors (Australian Farm Waste Portal 2025). This section highlights the types and quantities of waste and their fate using horticulture-focussed national and Queensland scale data.

### 3.3.1 Key insights

- FLW occurs across all stages of the supply chain, with highest volumes of FLW occurring on-farm, in households, and during manufacturing, both nationally and in Queensland.
- National FLW data highlights:
  - Manufacturing provides pathways for diverting FLW largely to animal feed, or to new food or non-food products (in smaller volumes).
  - FLW generated between the farm gate and distribution supply chain stages primarily utilise on-farm disposal and composting, while landfill accounts for most FLW in the post-retail stages.
  - FLW has negative impacts on the broader sustainability of the food system through greenhouse gas emissions, and wasted resources such as water and cultivated land use.
- Circular economy approaches are emerging both regionally and locally to reduce FLW through producing food, feed, fibre, bioproducts and bioenergy. Addressing evidence gaps in regional and local FLW data can support identifying opportunities for reducing FLW and its associated impacts on the food system and generating new sustainable products in SEQ.

### 3.3.2 Food loss and waste quantities, fates and opportunities

In Queensland, 7.7 million tonnes of organic waste was produced pre-farm gate, largely in broadacre farming in 2021 (*Figure 17*). Most organic waste generated pre-farm gate were reported as either managed on-site or recycled. This data aligns with national evidence that between 18 and 22% of fruit and vegetable biomass is lost before leaving the farm or packing shed, amounting to between 1.2–1.5 million tonnes of loss per year (Juliano et al. 2019). Key horticulture crops vulnerable to high losses in Queensland include tomatoes (between 104,000–150,000 tonnes per year), melons and watermelons (up to 90,000 tonnes per year), apples (up to 55,000 tonnes per year) and cucumbers (up to 35,000 tonnes per year; Juliano et al. 2019). FLW also occurs along the supply chain; approximately 2 million tonnes of food is estimated to be wasted each year across the cold chain (Brodribb et al. 2020). In specific sectors such as red meat, high volumes of organic waste are generated during processing, reaching volumes up to 675,000 tonnes per year (Tait et al. 2021).

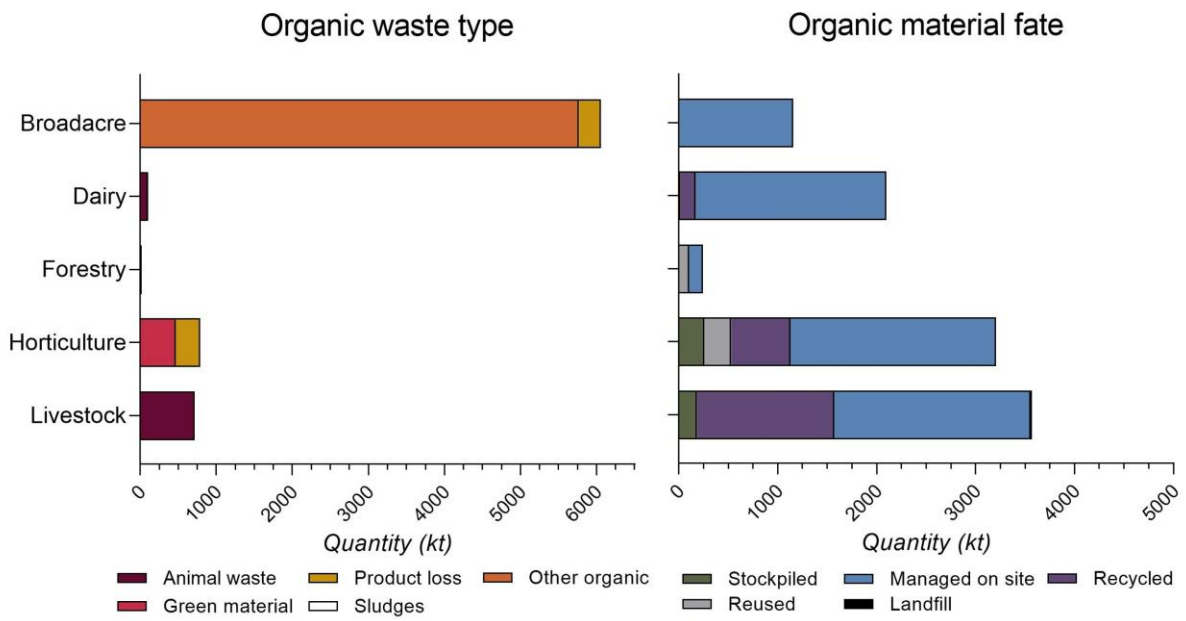



***Figure 17*** **Pre-farm gate organic waste material type and fate in Queensland from agricultural and forestry sectors.**

Source: Adapted from Australian Farm Waste Portal (2025). Note that organic waste is defined as those that are generated in primary production businesses prior to leaving the farm or vessel; organic materials (derived from biotic processes) that are managed on-farm may not be captured by waste figures.

The National Waste Report states that 14.6 Mt of organic waste is generated nationally per annum, 28% of which is food waste (Pickin & Macklin 2025). In 2021, National Food Waste Baseline mapped the fate of recovered, lost or wasted food across the supply chain, which was estimated to cost the economy an estimated $36.6 billion per year, with food waste costing households up to $2500 per year (FIAL 2019, 2021; *Figure 18*). While FLW is generated across all stages of the value chain, a high proportion of FLW is diverted to animal feed (62% of recovered food waste), with manufacturing preventing FLW through the creation of new non-food (20%) or new food products (9%) (FIAL 2021). On-farm disposal, commercial or on-site composting, and wastewater treatment are commonly utilised pathways for food waste treatment or reuse, although landfill remains the largest destination for food waste across wholesale and consumer supply chain stages. While the fate or recovery pathways for FLW in Queensland have not been reported, FLW volumes largely align with national figures and are highest at the primary producer (734 kt), household (602 kt), and manufacturing stages (277 kt), with lower volumes reported across hospitality (63 kt), retail (49 kt), institutions (46 kt) and wholesale (4 kt) (Department of Environment and Science 2022).

FLW occurs due to a range of reasons across, such as weather variability, damage from harvesting techniques, pest and disease pressures, strict market appearance standards, consumer behaviour and preferences, and supply chain disruptions, reducing the efficiency and profitability of producers while placing additional pressure on land, water, and labour resources (Heydari 2024). FLW also has large implications for broader sustainability of the food system. It has been estimated that nationally, wasted food is responsible for 3% of Australia's national greenhouse gas emissions (17.5 million tonnes $CO_2$ equivalents), 2,600 gigalitres of water consumption, and accounts for up 25.73 million hectares of land upon which wasted food has been grown (FIAL 2021).

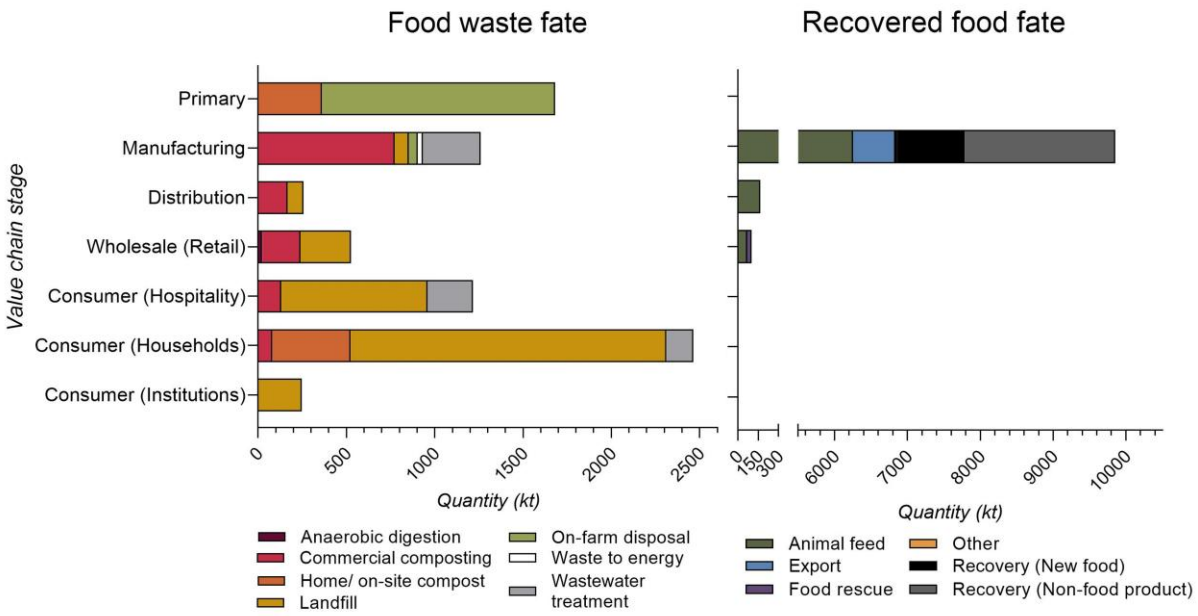



***Figure 18*** **National food waste baseline by value chain stage, and fates of wasted or recovered food. Source: adapted from FIAL (2021).**

Addressing FLW is important not only to improve sustainability and reduce emissions, but also to strengthen local food availability and support more stable returns for growers. Reported figures for food waste across SEQ may reach up to 30% of total household waste, or volumes up to 16.6 tonnes per year (e.g., Brisbane City Council 2026; Harris and McCabe 2022; Toowoomba Regional Council 2025). While there are some reported figures for total organic waste volumes at the SEQ level, there are gaps in current and available data for food loss and waste specifically at the regional or LGA level.

There is growing recognition of the potential of circular economy approaches to address FLW through identifying opportunities for reducing, reusing, and recycling (e.g., Hetherington et al. 2024). Interventions include identifying and designing out upstream barriers driving food loss and waste, circulating materials at their highest value in food or non-food products, and by diverting FLW materials away from landfill and towards approaches that can return nutrients to the soil or generate energy (O'Sullivan et al. 2025). These approaches include existing pathways to avoiding food waste (such as food rescue services) to new circular economy innovations that are already being championed by local businesses and growers across SEQ. These innovations also support the Queensland and national targets to halve food waste by 2030 and are aligned with the national Circular Economy Framework ambition to double Australia's circularity rate by 2035 (Australian Government 2017; Department of Environment and Science 2022; DCCEEW 2024). Circular economy initiatives exist in SEQ and beyond, that focus on reducing FLW and providing new opportunities for food system innovation (see box). Factors influencing the viability of new circular initiatives span both technical (e.g., FLW volumes and composition, seasonal variability, infrastructure needs) and regulatory (e.g., standards to ensure food and feed safety, risk assessments) considerations (End Food Waste CRC 2024).

**A circular approach: putting waste to work to develop high-value agriculture**

'Closing the loop' between food production and food waste offers an opportunity to put waste to work and add diversity to agricultural landscapes with smaller areas of high-value production, like intensive horticulture. Councils are positioned to support such development at scale through the configuration of LGA waste management, with the diversion of urban organic waste streams for soil enrichment and intensive food production. There are cases in SEQ and beyond that demonstrate the potential of this approach to developing productive horticultural enterprises on smaller parcels of land (e.g., Loop Growers – www.loopgrowers.com/about).

*Please refer to* Local government area insights *for more examples of place-based circular economy initiatives.*

### 3.3.3 Knowledge gaps

- Limited data on regional food loss and waste volumes, regional organic waste and FLW fates by sector and across the supply chain.
- Gaps in understanding both enabling factors and barriers for applying circular economy innovations for current FLW streams in SEQ, spanning technology readiness, economic feasibility, locally-led initiatives, and current regulations.

SNAPSHOT

# 3.4 Challenges and risks for food production and distribution

Peggy Schrobback and David Reynolds

More than half of SEQ's retail food supply depends on interstate and international freight corridors

Riparian zones across every SEQ catchment have deteriorated since 2021 — and vegetation loss was recorded in every catchment between 2018 and 2023

Water quality across Moreton Bay has not recovered to pre-2022 levels

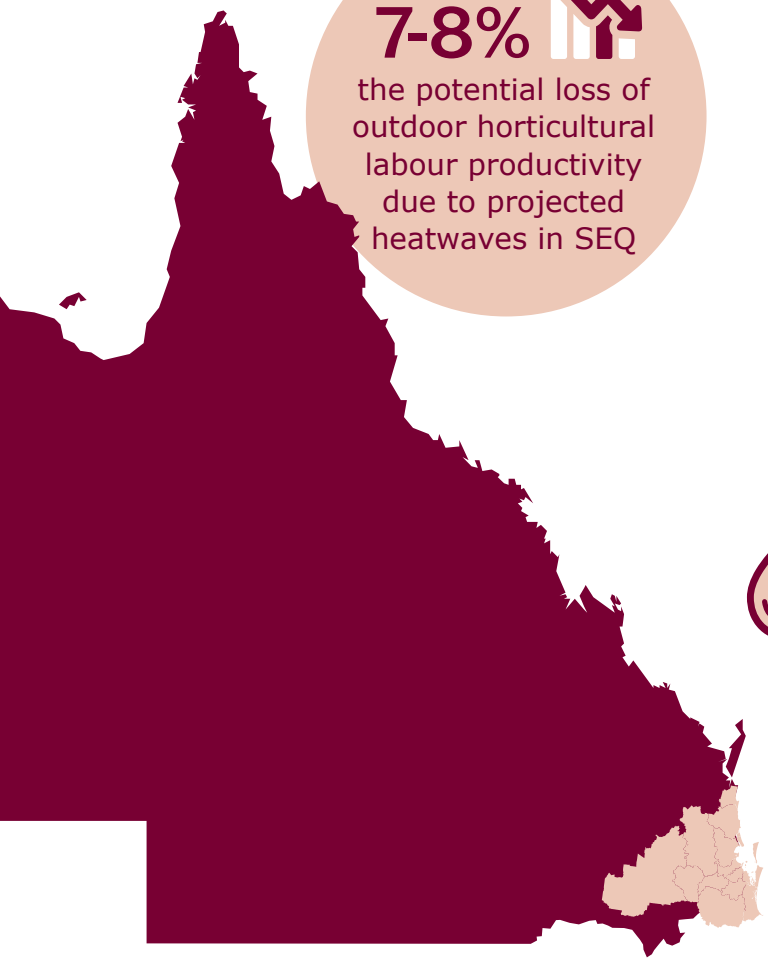
## OPPORTUNITIES

- Develop **integrated data systems** for improved visibility, decision-making and coordinated response
- **Improve ecosystem function** through land stewardship
- Support **localised and distributed food networks** that shorten supply chains and improve redundancy

**7-8%**
the potential loss of outdoor horticultural labour productivity due to projected heatwaves in SEQ

## CHALLENGES

- **Increasing climate variability** threaten production, labour productivity, and key infrastructure
- Environmental decline and **competing land-use pressures**
- SEQ's food distribution system is **highly vulnerable to disruptions**



High levels of algal growth and total phosphorus are contributing to a reduction in water quality in Moreton Bay

**2%**
potential increase in operating costs for horticultural businesses in SEQ due to projected heatwaves

SEQ's food system is challenged by climate risk, market concentration, infrastructure dependency, and population pressures. Strengthening these system components is essential to safeguard production and distribution and to meet the needs of a growing population, and disruptions – both planned events and weather or other shocks. The below highlights examples with recent SEQ empirical evidence and or active implementation plans for food production challenges.

> ***I'd love to see a future where our communities are genuinely resilient, and the systems and infrastructure across South East Queensland are set up to back them in.***
>
> **- FAN Forum**

### 3.4.1 Key insights

- Climate impacts projected for SEQ present challenges for food production, labour productivity, biosecurity risks and food distribution.
- Land and coastal areas in SEQ contain multiple, sometimes competing, values, such as agricultural production and conservation, with implications for regional planning and agribusiness operations.
- Back-ups and contingency planning for disaster risk management increasingly vital, and there are examples of successful models in SEQ to support this.

### 3.4.2 Production risks

Escalating climate impacts including hotter, longer heatwaves, increased extreme rainfall, coastal flooding/erosion, and bushfire risks could have several impacts on SEQ food system and food security. The National Climate Risk Assessment shows projected climate impacts for Australia and SEQ. Expected changes most relevant to the SEQ food system include (Darbyshire et al. 2025):

- Temperature and rainfall changes: The assessment includes projected changes to temperature and rainfall including, extreme events.
- Extreme events: The assessment warns that climate hazards will worsen, leading to more frequent and severe extreme events such as floods and heatwaves.
- Sea-level rise: The assessment warns that the majority of the most at-risk regions from rising sea levels by 2050 will be in Queensland, particularly in the south-east and Brisbane.
- Infrastructure & economy: Climate change is expected to disrupt critical infrastructure, increase costs, and impact agriculture productivity.

For much of Australia's agricultural zone, including SEQ, heatwaves are projected to increase (Darbyshire et al. 2025). Without more heat tolerant cultivars, heatwaves can cause significant direct damage to crops and increase costs of production. Likewise, should projected changes to rainfall materialise, there could be an increase in floods that affect production (Darbyshire et al. 2025). Climate impacts can also impact labour productivity. Ricketts & Whitnall (2025) highlight potential impacts for the productivity of outdoor horticultural workers (reductions of 7-8% under a 2°C temperature rise) and operating costs (increases of up to 2% under a 2°C temperature rise) for horticultural businesses in SEQ. Details of projected climate impacts for each LGA in SEQ (and

Australia) are available in an interactive format in the Australian Climate Services Data Explorer and the Queensland Government's Long Paddock Future Climate dashboard [2].

Alongside adaptation, agri-food businesses in SEQ are mitigating emissions and responding to mitigation requirements. Data on agricultural emissions in only SEQ or food-sector emissions is not available. However, data for Queensland shows that greenhouse gas emissions from the agricultural sector contributed 21 million tonnes of carbon dioxide equivalent or 16.9% of total emissions in Queensland in 2022 (Queensland Government 2024).

Meanwhile, the state of waterways in the Healthy Land and Water natural resource management (NRM) region in SEQ is facing a general decline in condition since 2021 (Healthy Land & Water, 2025). Importantly:

- In 2025 the condition of the riparian zones within the catchments of SEQ ranged from very poor to fair.
- Between 2018 and 2023 riparian zone woody vegetation losses occurred across all catchments in SEQ. Activities, contributing to the losses include urban and housing development, linear infrastructure projects, forestry and agriculture.
- Water quality across Moreton Bay has not recovered to pre-2022 levels. In 2025, high levels of algal growth (chlorophyll a) and total phosphorus are contributing to a reduction in water quality.

With population growth set to continue, and with the growing recognition of climate change-related impacts on the frequency and reliability of rainfall in the region, water resources in SEQ will continue to be placed under extensive pressure. As a result, careful and targeted restoration is required to both safeguard productive agricultural land and support the regeneration of native vegetation.

Land and coastal areas in SEQ contain multiple, sometimes competing, values that also impact agri-food businesses and production. For example, SEQ is home to important koala habitat managed under the SEQ Koala Conservation Strategy (2020–2025; DES, 2020) and associated development regulations. Funding programs that expand native vegetation and establish habitat refugia often target areas that may also be suitable for agriculture.

Biosecurity risks from emergency animal diseases, such as foot and mouth disease and African swine fever, also remain significant and require active mitigation in SEQ and more broadly, as disease control measures can have severe implications for meat supply and broader socio-economic outcomes (Schrobback et al., 2025).

### 3.4.3 Distribution risks

Food distribution in SEQ is also vulnerable to severe weather, infrastructure failure, and reliance on a small number of supermarket-controlled pathways, and international markets. For example, Queensland's disaster history shows that flooding, cyclones, and storm damage can sever transport links, suspend supermarket operations, and disrupt delivery networks. Events such as the 2021-2022 Southern Queensland floods demonstrated how quickly shelves can empty. For example, the Brisbane Markets at Rocklea – one of the region's key distribution hubs, suppling major supermarkets and food service operators – is in a flood-risk area (*Figure 19*). Further, with 75–85% of

[2] https://www.acs.gov.au/pages/data-explorer; https://www.longpaddock.qld.gov.au/qld-future-climate/dashboard/

groceries in Australia purchased through Coles, Woolworths and ALDI (ACCC, 2025), these retailers effectively function as the nation's food distribution infrastructure. Their distribution centres around SEQ (11 in total) are critical assets but their connectivity passes through flood-risk areas (*Figure 19*), representing a risk for SEQ's food system.

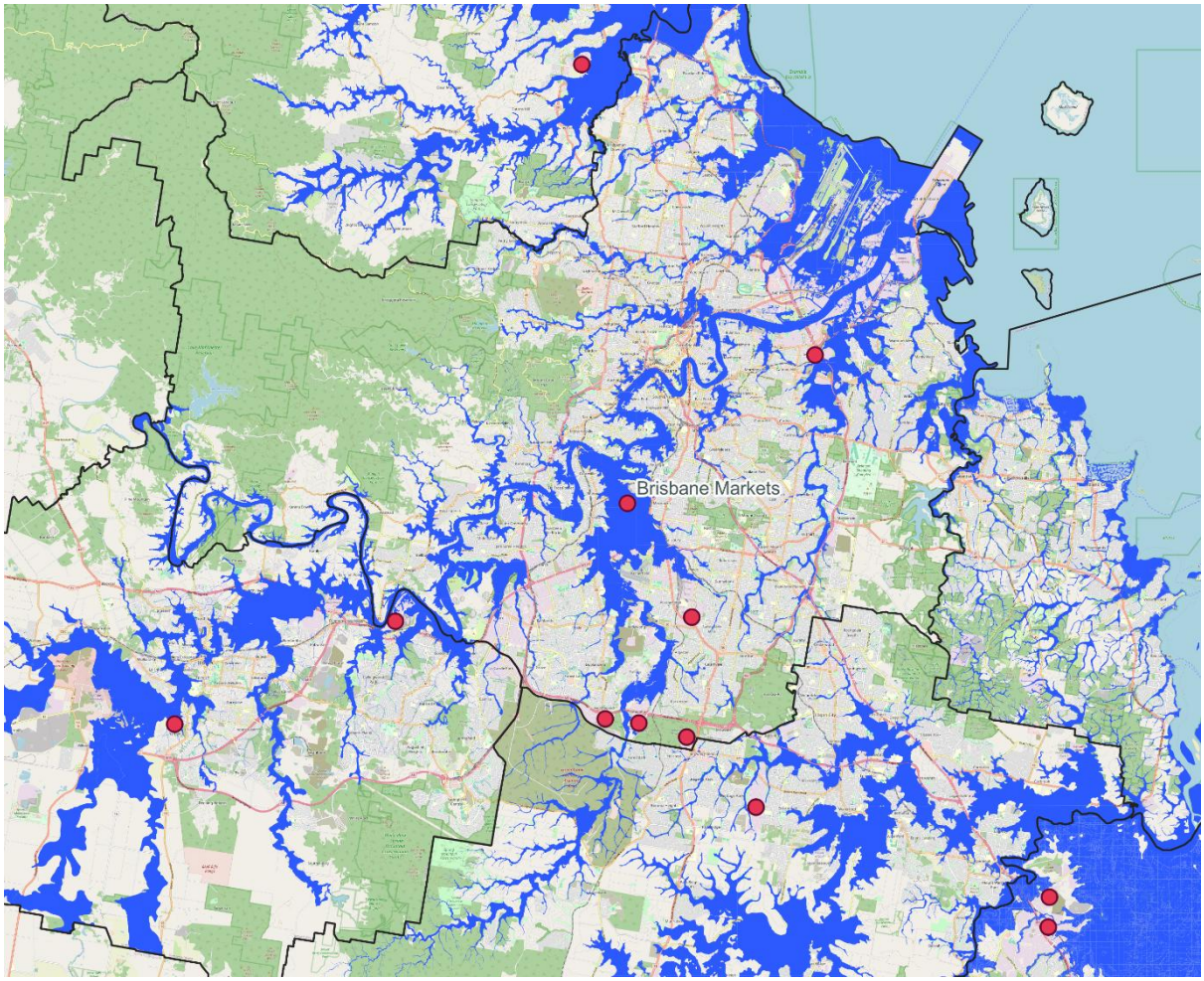



***Figure 19* Map of major supermarket distribution centres in SEQ and Brisbane Markets, with flood risk areas.**

Sources: Flood risk concordance with food distribution centres was mapped in QGIS using: OpenStreetMap data for a base map (available under the Open Database License); distribution centre data from ALDI (n.d.), Coles (2024) and Woolworths (2025), as well as Google Maps (2026); LGA boundaries from Queensland Government (2025c); and flood risk data from Councils (Brisbane City Council (2022), City of Gold Coast (2025), Ipswich City Council (2025), Logan City Council (2025), City of Moreton Bay (2022), and Redland City Council (2025a).

Localised distribution networks, such as community-based wholesalers, independent grocers, and diverse producer networks, have repeatedly shown strong adaptive capacity during disasters – with shorter pathways, stronger relationships, and fewer intermediaries enable faster recovery in disruption or disaster scenarios (see box). The increasing population of SEQ makes having viable back-ups and contingency planning for disaster risk management increasingly vital.

Furthermore, technology is playing an increasingly important role across the entire food system—from production planning and distribution to governance and consumer access. Understanding the technologies involved, as well as the rate of adoption of automation, digital tools and supply-chain innovations, is essential for supporting a resilient and adaptive food system.

This section outlined that the SEQ food supply system is diverse and regionally significant, but it remains vulnerable to climate shocks, market concentration, infrastructure exposure, and reliance

on interstate and international supply. While SEQ produces high quality food and retains a strong base in livestock, vegetables, and niche horticulture, more than half of its retail food supply depends on external regions, and key logistics nodes, e.g., markets, freight corridors, and supermarket distribution centres, are highly exposed to flooding and other hazards. Overall, SEQ's food resilience depends on strengthening infrastructure, diversifying supply pathways, improving data availability, and addressing structural pressures across the system.

**Existing local food supply systems**

Local food supply systems created in SEQ help build short-term food resilience in the region. For example in the 2021-2022 Southern Queensland floods, the Food Connect Shed continued to provide food to customers, drawing on 15 years of 'developing and nurturing' a local food system in Brisbane with a business model founded on strong relationships all along the value-chain, strong place-based knowledge, few intermediaries and a wide diversity of suppliers, which enabled rapid planning and effective adaptation.

On the Sunshine Coast, Whites IGAs remained well-stocked with locally produced bread and milk by drawing on established local suppliers while longer supply chains were strained or severed during flooding in 2022, and again during Cyclone Alfred in 2025.

Sources: Sustainable Table – www.sustainabletable.org.au/; Locavores Podcast (Acast) – feeds.acast.com/public/shows/629437c71ccd8800132895ea

Improving SEQ's food system resilience requires coordinated policy action to reduce exposure to climate, market, and infrastructure risks. Governments can strengthen preparedness by investing in resilient transport and cold chain infrastructure, protecting key agricultural land, and supporting localised distribution channels that shorten supply chains. Policies that enhance transparency, diversify procurement, support sustainable production, and reduce dependency on a small number of retailers and global suppliers will improve redundancy and adaptability. Embedding these insights into spatial planning, climate adaptation strategies, and regional development frameworks will help ensure reliable, equitable, and affordable food access for SEQ's growing population.

### 3.4.4 Knowledge gaps

- End-to-end traceability and data sharing mechanisms for disruptions: This can enable governments to rapidly identify where supply is constrained during shocks (e.g., blocked routes, storage failures, processing bottlenecks), target emergency and recovery interventions, and reduce cascading disruptions by activating alternative pathways.
- Streamlined data (e.g., population, land use, production, distribution, consumption): to improve coordinated planning and investment by ensuring agencies work from consistent, up to date information, enabling comparable risk assessments across LGAs, faster decision-making in emergencies, and clearer prioritisation of infrastructure and resilience funding.
- Consistent indicators of climate, biosecurity, and logistics risk: It provides a common basis to monitor vulnerability and track resilience over time, helping policymakers prioritise mitigation actions, set performance targets, guide preparedness planning, and evaluate whether interventions are reducing exposure and improving redundancy.

SNAPSHOT

# 3.5 Employment and skills in food-related sectors

David Reynolds, Peggy Schrobback and Nikki Dumbrell


## OPPORTUNITIES

- Strengthen **local workforce mobility** through public transport access, upskilling and attraction
- Prioritise **workforce data** to support better planning and investment decisions
- Strengthen **local economic resilience** by leveraging SEQ's distributed employment base

## CHALLENGES

- Persistent **labour shortages** and recruitment difficulties in horticulture
- An **ageing on-farm workforce** presents risks for long-term production capacity, skills transfer and succession
- Workforce data is **fragmented and incomplete**, making planning difficult

The SEQ food system is underpinned by a critical workforce, from agricultural production through to processing, manufacturing, distribution, retail and services. The region's food sector employs a substantial share of the workforce, especially in LGAs where agriculture and food processing form much of the economic base.

> ***As our population changes, businesses need the ability to adapt their workforce—bringing people in when they're needed and upskilling as things evolve.***
>
> **- FAN Forum**

This section presents an overview of employment patterns and workforce characteristics within SEQ's food system. It highlights the significance of food-related jobs to regional economic activity, examines labour supply challenges, especially in horticulture, and highlights emerging and ongoing trends. It also identifies key data limitations that constrain decision making and emphasises the importance of strengthening labour force intelligence to support long-term food system goals.

### 3.5.1 Key insights

- Food-related industries employ one in eight people in the SEQ region, highlighting the importance of these sectors to the regional economy.
- Downstream sectors dominate employment, with food and beverage services and food retailing making up the largest share of food-related jobs across SEQ.
- Primary production remains concentrated in LGAs such as Lockyer Valley, Scenic Rim and Somerset, while food manufacturing, retailing, and services provide the bulk of food-related employment in highly populated areas.
- Challenges persist in recruiting temporary seasonal labour, especially in the horticultural sector.

### 3.5.2 Workforce distribution

Food-related sectors are significant employers across SEQ, accounting for 12.5% of all employment in 2021 (228,981 of the 1,830,581 jobs across the region; ABS, 2023b). This assessment is based on employment in 31 industry sector categories classed as 'food related' (see section 6.4.6 for more about the categories). While Census data used for this assessment is the best available, this approach likely undercounts food-related jobs. For example, truck drivers who only, mostly or sometimes transport food cannot be separated from truck drivers that do not transport food. Very localised counts for specialised jobs can also be difficult to interpret when randomisation is applied in released statistics for confidentiality of individuals or businesses.

*Figure 20* shows the share of total food-related employment in SEQ contributed by each major sector. It highlights that food and beverage services make up the largest proportion of the workforce, followed by food retailing, while food product manufacturing, agriculture, aquaculture and fisheries, and wholesaling sectors contribute smaller but still important shares. Overall, the figure illustrates that most food-related jobs in SEQ are concentrated in downstream, service-oriented parts of the food system, with primary production and manufacturing representing smaller, yet essential, components. This also reflects SEQs role as a processing and value-adding hub for food commodities produced outside of SEQ.

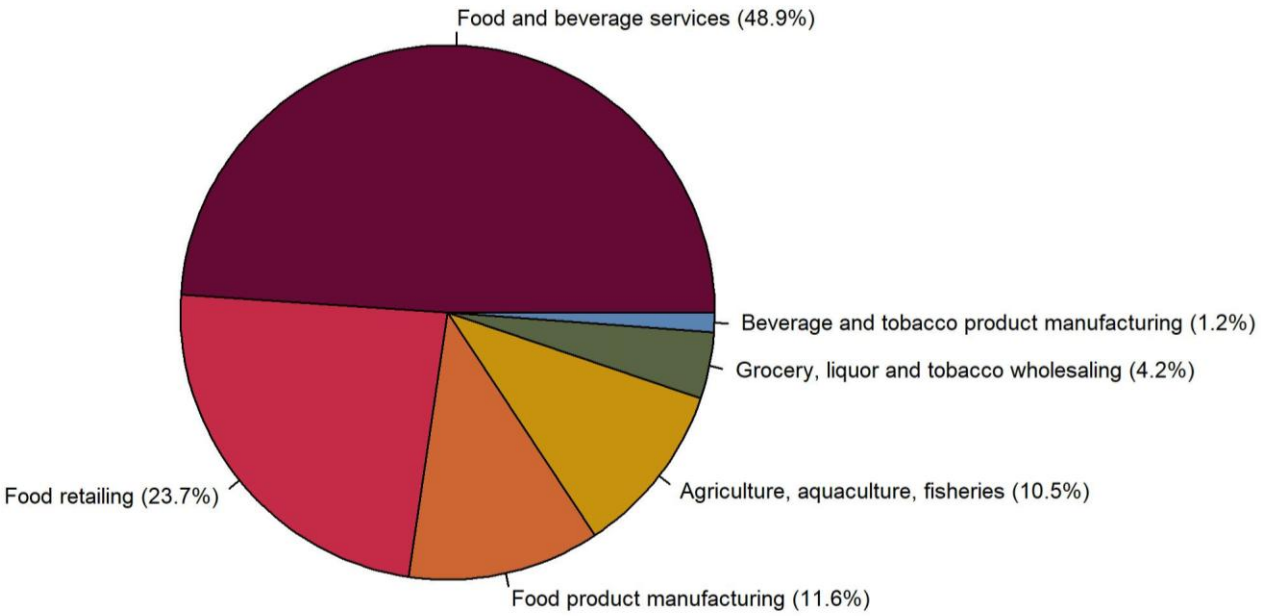



***Figure 20*** **Proportion of employment by food-related sectors in SEQ. Source: NIEIR (2025).**

*Table 11* shows that the share of food-related employment relative to total employment is uneven across the region. Employment in LGAs such as Lockyer Valley and Somerset is heavily dependent on food-related sectors in general (>40%), as well as featuring relatively high rates of employment in the agriculture sector (12%-28%). In contrast, LGAs, such as Brisbane, Gold Coast, and Moreton Bay feature more employment in downstream sectors such as food retailing and food and beverage services, with agriculture representing only a small component of local employment (*Table 11*).

*Table 11* **Employment in food-related industries by LGA in SEQ (2023/24)**

| Sectors | Brisbane | Gold Coast | Ipswich | Lockyer Valley | Logan | Moreton Bay | Noosa | Redland | Scenic Rim | Somerset | Sunshine Coast | Toowoomba | Total SEQ |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Agriculture, aquaculture & fisheries* | 2245 | 1,323 | 473 | 4,689 | 742 | 2,847 | 392 | 534 | 2,214 | 1,341 | 2,932 | 7,855 | 27,587 |
| | 0.2% | 0.4% | 0.5% | 28.2% | 0.6% | 1.7% | 1.4% | 1.0% | 12.8% | 15.9% | 1.6% | 8.1% | 1.3% |
| *Agriculture* | *1,584* | *1218* | *431* | *4,318* | *593* | *2,213* | *270* | *408* | *2,185* | *1,263* | *2,359* | *7,124* | *23,966* |
| | *(70.6%)* | *(92.1%)* | *(91.1%)* | *(92.1%)* | *(79.9%)* | *(77.7%)* | *(68.9%)* | *(76.4%)* | *(98.7%)* | *(94.2%)* | *(80.5%)* | *(90.7%)* | *(86.9%)* |
| *Aquaculture* | *83* | *52* | *2* | *9* | *-* | *16* | *6* | *12* | *18* | *-* | *0* | *-* | *198* |
| | *(3.7%)* | *(3.9%)* | *(0.4%)* | *(0.2%)* | | *(0.6%)* | *(1.5%)* | *(2.2%)* | *(0.8%)* | | *(0.0%)* | | *(0.7%)* |
| *Fishing, hunting & trapping* | *222* | *53* | *13* | *-* | *22* | *232* | *64* | *92* | *-* | *-* | *259* | *30* | *987* |
| | *(9.9%)* | *(4.0%)* | *(2.7%)* | | *(3.0%)* | *(8.1%)* | *(16.3%)* | *(17.2%)* | | | *(8.8%)* | *(0.4%)* | *(3.6%)* |
| *Ag., forestry & fishing support service* | *356* | *214* | *27* | *362* | *12* | *386* | *52* | *22* | *11* | *78* | *314* | *701* | *2,650* |
| | *(15.9%)* | *(16.2%)* | *(5.7%)* | *(7.7%)* | *(1.6%)* | *(13.6%)* | *(13.3%)* | *(4.1%)* | *(0.5%)* | *(5.8%)* | *(10.7%)* | *(8.9%)* | *(9.6%)* |
| Food Product Manufacturing | 12,748 | 3,886 | 2,483 | 657 | 1,883 | 1,180 | 236 | 1,155 | 306 | 1,436 | 2,062 | *2,288* | 30,320 |
| | *1.3%* | *1.1%* | *2.6%* | *4.0%* | *1.4%* | *0.7%* | *0.8%* | *2.1%* | *1.8%* | *17.1%* | *1.1%* | *2.4%* | *1.4%* |
| Beverage & tobacco Manufacturing | 1406 | 841 | 317 | - | 36 | 40 | 86 | 114 | 76 | - | 216 | *55* | 3,187 |
| | *0.1%* | *0.2%* | *0.3%* | | *0.0%* | *0.0%* | *0.3%* | *0.2%* | *0.4%* | | *0.1%* | *0.1%* | *0.1%* |
| Grocery, liquor & tobacco wholesaling | 5865 | 1432 | 343 | 26 | 1,189 | 264 | 89 | 175 | 14 | 44 | 694 | *333* | 10,468 |
| | *0.6%* | *0.4%* | *0.4%* | *0.2%* | *0.9%* | *0.2%* | *0.3%* | *0.3%* | *0.1%* | *0.5%* | *0.4%* | *0.3%* | *0.5%* |
| Food retailing | 22,749 | 10108 | 3,710 | 600 | 4,314 | 6,797 | 1,224 | 3,153 | 555 | 306 | 6,159 | *2,441* | 62,116 |
| | *2.3%* | *3.0%* | *3.9%* | *3.6%* | *3.3%* | *4.0%* | *4.3%* | *5.7%* | *3.2%* | *3.6%* | *3.4%* | *2.5%* | *2.9%* |
| Food & beverage services | 49,640 | 23682 | 5,971 | 899 | 8,199 | 13,273 | 3,026 | 3,868 | 1,138 | 290 | 12,730 | *5,362* | 128,078 |
| | *4.9%* | *7.0%* | *6.3%* | *5.4%* | *6.2%* | *7.9%* | *10.5%* | *7.0%* | *6.6%* | *3.4%* | *7.0%* | *5.5%* | *6.0%* |
| **Total food-related** | **94,653** | **41,272** | **13,297** | **6,871** | **16363** | **24,401** | **5,053** | **8,999** | **4,303** | **3,417** | **24,793** | **18,334** | **261,756** |
| | *9.4%* | *12.1%* | *13.9%* | *41.4%* | *12.4%* | *14.5%* | *17.6%* | *16.2%* | *24.9%* | *40.6%* | *13.6%* | *19.0%* | *12.2%* |
| Other industries | 939259 | 298,833 | 82,226 | 9,724 | 116,009 | 143,679 | 26,656 | 46,455 | 12,948 | 5,077 | 157,087 | 78,380 | 1,916,333 |
| | *93.1%* | *87.8%* | *86.1%* | *58.6%* | *87.6%* | *85.4%* | *92.9%* | *83.8%* | *75.1%* | *60.3%* | *86.3%* | *81.0%* | *89.1%* |
| **Total** | **1,008,464** | **340,170** | **95,532** | **16,599** | **132,383** | **168,158** | **28,686** | **55,454** | **17,251** | **8,416** | **181,931** | **96,730** | **2,149,774** |

Source: NIEIR (2025). Notes: Percentages 0.0% are of total employment; *(0.0%)* are of total of 'Agriculture, aquaculture & fisheries' sector employment. 'Agriculture' includes non-food commodities, like cotton. Employment data at the LGA level with more detailed breakdown of industry categories were unavailable. Data for food-related jobs within sectors, notably transport, are not included due to lack of availability. Employment for 'Forestry and logging', generally reported with 'Agriculture, aquaculture & fisheries', is included under 'Other Industries'. 'Other industries' include mining, non-food manufacturing, construction, non-food wholesale trade, utility services, transport and postal, finance and insurance services, education, health care, recreation, professional services and other.

### 3.5.3 SEQ food system workforce characteristics

Half of the workers in food-related industries in SEQ are aged under 30 years, reflecting the importance of food retail and food service sectors as entry-level employers (*Table 12*). This employment pattern contrasts with the age distribution of on-farm employment which in SEQ, like the rest of Australia, is aging (ABS, 2023b).

***Table 12* Age of workers in food-related industries across LGAs in SEQ (2021)**

| Worker Age | 15-19 years | 20-29 years | 30-39 years | 40-49 years | 50-59 years | 60-69 years | 70-79 years | 80-89 years | Total |
|---|---|---|---|---|---|---|---|---|---|
| **Brisbane** | 17,680 | 23,926 | 13,224 | 8,630 | 6,623 | 2,779 | 482 | 40 | 73,397 |
| **Gold Coast** | 9,427 | 10,012 | 6,392 | 5,149 | 4,143 | 1,922 | 383 | 21 | 37,460 |
| **Ipswich** | 3,408 | 3,533 | 2,616 | 2,071 | 1,558 | 593 | 72 | 17 | 13,869 |
| **Lockyer Valley** | 710 | 1,135 | 937 | 641 | 695 | 378 | 123 | 31 | 4,635 |
| **Logan** | 4,470 | 4,913 | 3,773 | 3,081 | 2,530 | 1,050 | 112 | 5 | 19,944 |
| **Moreton Bay** | 7,741 | 6,409 | 4,074 | 3,511 | 3,014 | 1,334 | 224 | 9 | 26,319 |
| **Noosa** | 916 | 656 | 587 | 580 | 547 | 281 | 68 | 10 | 3,646 |
| **Redland** | 2,739 | 1,841 | 1,207 | 1,261 | 1,198 | 624 | 87 | 11 | 8,978 |
| **Scenic Rim** | 711 | 549 | 436 | 478 | 607 | 431 | 202 | 51 | 3,468 |
| **Somerset** | 335 | 429 | 514 | 424 | 363 | 244 | 109 | 20 | 2,436 |
| **Sunshine Coast** | 6,088 | 4,876 | 3,157 | 2,725 | 2,468 | 1,378 | 315 | 34 | 21,052 |
| **Toowoomba** | 2,627 | 2,960 | 2,315 | 2,005 | 1,935 | 1,333 | 512 | 90 | 13,785 |
| **Total** | **56,850** | **61,245** | **39,245** | **30,556** | **25,688** | **12,355** | **2,687** | **331** | **228,981** |
| *Age group as % of total* | *24.8%* | *26.7%* | *17.1%* | *13.3%* | *11.2%* | *5.4%* | *1.2%* | *0.1%* | |

Source: ABS (2023b). Note: The list of 31 groups in industry sector categories included as 'food related' here are given in the Data and methods chapter of this report, specifically 6.4.6.

Food and agriculture workers in SEQ overwhelmingly live in the same LGA in which they work (see diagonal trend in *Table 13*), with only small numbers commuting across LGA boundaries, indicating that the food system workforce is highly localised.

This strong local reliance means that LGAs such as Lockyer Valley, Somerset, and Scenic Rim depend heavily on their resident population to sustain primary production, while Brisbane operates as a larger but still predominantly self-contained employment hub. The limited commuting flows imply that the SEQ food system workforce supply and resilience is closely tied to local conditions such as housing, transport, and access to services.

*Table 14* presents the citizenship status of people employed in food-related industries in SEQ in 2025. The table shows that the workforce is predominantly Australian citizens.

*Table 13* **Number of SEQ residents employed in food-related industries in LGAs and their LGA of residence (2021)**

| LGA (place of work) | Brisbane | Gold Coast | Ipswich | Lockyer Valley | Logan | Moreton Bay | Noosa | Redland | Scenic Rim | Somerset | Sunshine Coast | Toowoomba | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| LGA (residence) | | | | | | | | | | | | | |
| Brisbane | 63,373 | 809 | 1,616 | 91 | 2,176 | 1,936 | 32 | 1,134 | 121 | 93 | 213 | 81 | 71,682 |
| Gold Coast | 1,182 | 33,080 | 64 | 19 | 689 | 24 | 4 | 115 | 222 | 0 | 9 | 28 | 35,439 |
| Ipswich | 4,248 | 80 | 8,355 | 195 | 296 | 21 | 0 | 24 | 106 | 174 | 6 | 21 | 13,527 |
| Lockyer Valley | 110 | 8 | 210 | 3,606 | 17 | 3 | 0 | 9 | 11 | 149 | 3 | 342 | 4,475 |
| Logan | 6,277 | 1,474 | 514 | 53 | 10,136 | 34 | 5 | 610 | 360 | 3 | 5 | 14 | 19,486 |
| Moreton Bay | 6,141 | 41 | 40 | 12 | 67 | 18,137 | 14 | 35 | 9 | 450 | 667 | 28 | 25,641 |
| Noosa | 36 | 3 | 0 | 0 | 0 | 10 | 2,925 | 3 | 3 | 0 | 436 | 3 | 3,416 |
| Redland | 2,390 | 141 | 60 | 6 | 266 | 25 | 0 | 5,842 | 4 | 9 | 11 | 6 | 8,756 |
| Scenic Rim | 115 | 190 | 168 | 7 | 156 | 0 | 0 | 9 | 2,683 | 6 | 0 | 5 | 3,331 |
| Somerset | 96 | 3 | 207 | 157 | 0 | 77 | 0 | 5 | 0 | 1,804 | 11 | 11 | 2,359 |
| Sunshine Coast | 286 | 30 | 11 | 0 | 22 | 281 | 1,041 | 9 | 0 | 68 | 18,431 | 10 | 20,190 |
| Toowoomba | 69 | 5 | 13 | 350 | 7 | 7 | 6 | 8 | 11 | 25 | 10 | 12,558 | 13,042 |
| **Total** | **84,308** | **35,874** | **11,254** | **4,508** | **13,823** | **20,550** | **4,014** | **7,784** | **3,527** | **2,788** | **19,814** | **13,107** | **221,349** |

Source: ABS (2023b). Note: The list of 31 groups in industry sector categories included as 'food related' here are given in Section 7.

*Table 14* **Citizenship of workers in food-related industries across LGAs in SEQ (2021)**

| LGA | Australian Citizen | *% Australian Citizen* | Not an Australian Citizen | *% not Australian Citizen* | Not stated | Total |
|---|---|---|---|---|---|---|
| Brisbane | 55,226 | *75.2%* | 17,978 | *24.5%* | 192 | 73,397 |
| Gold Coast | 28,983 | *77.4%* | 8,368 | *22.3%* | 109 | 37,460 |
| Ipswich | 11,705 | *84.4%* | 2,103 | *15.2%* | 48 | 13,869 |
| Lockyer Valley | 3,579 | *77.2%* | 1,030 | *22.2%* | 31 | 4,635 |
| Logan | 15,674 | *78.6%* | 4,229 | *21.2%* | 45 | 19,944 |
| Moreton Bay | 22,486 | *85.4%* | 3,767 | *14.3%* | 65 | 26,319 |
| Noosa | 3,080 | *84.5%* | 548 | *15.0%* | 11 | 3,646 |
| Redland | 7,961 | *88.7%* | 990 | *11.0%* | 30 | 8,978 |
| Scenic Rim | 3,188 | *91.9%* | 259 | *7.5%* | 11 | 3,468 |
| Somerset | 1,988 | *81.6%* | 434 | *17.8%* | 10 | 2,436 |
| Sunshine Coast | 18,162 | *86.3%* | 2,822 | *13.4%* | 61 | 21,052 |
| Toowoomba | 12,135 | *88.0%* | 1,609 | *11.7%* | 33 | 13,785 |
| **Total** | **184,181** | ***80.4%*** | **44,144** | ***19.3%*** | **655** | **228,981** |

Source: ABS (2023b). Note: The list of 31 groups in industry sector categories included as 'food related' here are given in the Data and methods chapter of this report, specifically section 6.4.6.

The horticulture sector in Queensland is reliant on seasonal workers – during a good harvest season up to 18,000 temporary full time equivalent jobs are available monthly (DPI, 2026). The sector is reliant on overseas workers to meet this need for temporary labour (Queensland Farmers' Federation, Jobs Queensland and Rural Jobs and Skills Alliance, 2022).

*Table 15* summarises horticulture farm labour conditions across four regions relevant to SEQ in 2021–22, showing that labour is a major cost and recruitment was difficult. Labour costs accounted for roughly 31–35% of total operating expenditure per farm (*Table 15*); farms also reported substantial use of advanced machinery to reduce labour demand, ranging from 18% of farms in Brisbane, Gold Coast and Logan to 45% in (Darling Downs and) Toowoomba. A small minority of farms reported no difficulty recruiting workers (7–17% across regions), while use of overseas workers was much more common in-peak months (14–39% of farms) than non-peak months (7–17%).

The Pacific Australia Labour Mobility (PALM) scheme enables eligible businesses to recruit workers from nine Pacific island countries and Timor-Leste for unskilled, low-skilled and semi-skilled jobs, for short-term (up to nine months), or long-term (one to four years) contracts (Australian Government, 2025). Under this scheme, nationally 56% of visa-holders work in agriculture and 35% in meat processing. In Queensland there were 5,820 short-term and 5,565 long-term workers as of November 2025 (DEWR 2025). However, more detailed regional or sector specific data for SEQ are not readily available.

*Table 15* **Horticulture farm labour situation estimates for ABARES regions relevant to SEQ (2021-22)**

| Indicator | Brisbane, Gold Coast & Logan | Ipswich & Moreton Bay | Sunshine Coast | Darling Downs & Toowoomba |
|---|---|---|---|---|
| Labour costs per farm (% of total operating expenditure) | 31.0 | 30.6 | 32.4 | 35.4 |
| Used advanced machinery to reduce demand for labour (% of farms) | 17.9* | 38.2 | 31.6 | 44.9 |
| No difficulty with recruiting (% of farms) | 7.1** | 17.0 | 8.8* | 14.1 |
| Used overseas workers in peak months (% of farms) | 14.3* | 38.9 | 29.8 | 38.6 |
| Used overseas workers in non-peak months (% of farms) | 3.6** | 17.3 | 5.3** | 15.1 |
| Total labour use at peak month (no. of workers) | 1,970** | 7,020 | 2,000 | - |

Source: Downham and Litchfield (2022). Notes: The divisions are ABARES horticulture regions. Locations in these regions can be identified at: https://www.agriculture.gov.au/abares/data/find-your-region. RSE is Relative Standard Error, expressed as a percentage of the estimate. *RSE value of over 25%. ** RSE value of over 50%.

*Table 16* shows the composition of horticulture labour in SEQ during 2021–22, revealing that the workforce relied most heavily on Australian residents on non-permanent contracts (31%), followed by overseas workers on non-PALM temporary contracts (24%), with permanent employees (17%) and family labour (3%) making up much smaller shares. PALM workers accounted for only 10% of total horticultural labour despite the scheme's national importance, and their distribution varied across regions. Total peak labour across the four SEQ subregions amounted to 11,620 workers, though several categories have high relative standard errors, indicating varying reliability of the estimates.

*Table 16* **Horticulture farm labour by contract type for ABARES regions relevant to SEQ (2021-22)**

| Contract type | Brisbane, Gold Coast & Logan | Ipswich & Moreton Bay | Sunshine Coast | Darling Downs & Toowoomba |
|---|---|---|---|---|
| Permanent | 230* | 780 | 300 | 710 |
| *Contract % of total* | *11.7%* | *18.7%* | *15.3%* | *9.7%* |
| Family | 260 | 670 | 370 | 740 |
| *Contract % of total* | *13.3%* | *16.0%* | *18.9%* | *10.1%* |
| Contract PALM | 110** | 520** | 80** | 400** |
| *Contract % of total* | *5.6%* | *12.4%* | *4.1%* | *5.5%* |
| Contract overseas other | 240** | 870* | 1,040** | 570* |
| *Contract % of total* | *12.2%* | *20.8%* | *53.1%* | *7.8%* |
| Contract Australia | 1,120** | 1,350 | 170* | 1,240 |
| *Contract % of total* | *57.1%* | *32.3%* | *8.7%* | *16.9%* |
| **Total** | **1,960**** | **4,180** | **1,960*** | **7,330** |

Source: Downham and Litchfield (2022). Notes: The divisions are ABARES horticulture regions. Permanent workers may be full-time or part-time. Contract refers to workers employed on a casual or contract agreement. Overseas other includes workers in Working Holiday Maker program (this program has been revised since data collection), other visa streams and unknown. Australia workers refers to Australia or New Zealand resident workers. RSE is Relative Standard Error, expressed as a percentage of the estimate. *RSE value of over 25%. ** RSE value of over 50%.

Policy responses to labour shortages in Queensland include migration and training subsidies (Migration Queensland 2026; Department of Trade, Employment and Training 2026). As with other sectors and regions, housing, training, attraction and retention of labour are challenges faced by food-related sectors. Data about businesses in the food system, including in the agriculture sector, can describe the landscape in which labour shortages arise.

The high-level description of the distribution and composition of the workforce provided here highlights that workforce resilience strategies need to be place-based, recognising that different LGAs face different risks and opportunities. Further, strengthening the local labour pipeline, through housing, transport access, training, and workforce attraction is critical, especially in primary production regions with limited commuting inflows. The concentration of downstream food sector employment in major urban centres highlights the need for continuity planning in retail and food services, particularly given their large workforce footprint.

### 3.5.4 Knowledge gaps

- Limited visibility of agricultural labour force composition: Detailed data on the visa status, employment conditions, and contract types of agricultural workers in SEQ are largely missing, making it difficult to understand reliance on temporary migrant labour or to plan for workforce continuity.
- Insufficient data on food sector business workforce capacity: Across food-related industries, data on employee headcounts, wages, skills, and turnover are incomplete or unavailable for many businesses, reducing the ability to assess labour shortages, productivity constraints, and future skills needs.
- Weak regional labour mobility information: While Census data indicate that most workers live and work locally, there is limited understanding of barriers to labour mobility, such as transport constraints, housing availability, or commuting capacity—factors critical for planning workforce resilience during disruptions.
- Gaps in seasonal and peak period labour demand data: Existing datasets provide only high-level estimates of peak farm labour use, with limited detail on seasonal variability, short notice workforce shortages, and industry-specific labour cycles, hindering effective planning for seasonal programs and emergency response.

SNAPSHOT

# 4 Aboriginal and Torres Strait Islander Insights

**First Nations roundtables**
Aboriginal and Torres Strait Islander peoples are producers, innovators, knowledge holders, consumers, and community leaders. Their leadership is essential to building a resilient, sustainable and culturally grounded food system.

## 1 Community identified challenges

Food insecurity is a **widespread system problem**, yet **largely invisible** in data

**Cultural safety** and **stigma** shape everyday food access

Access barriers include **transport/ geography, affordability,** and **service hours**

Community-controlled organisations are **trusted but overstretched**

## 2 Key principles

Systems lens

**Cultural safety**

Embedded governance

**Place-based design**

## 3 Enterprise insights

First Nation enterprises **create cultural, economic and environmental value**, including native foods, land care, and cultural knowledge

Key barriers: Access to **capital, infrastructure gaps**, procurement pathways, scaling while maintaining cultural integrity

## 4 What good looks like

**First Nation–led** infrastructure and coordination

Embed **governance** and early **co-design**

Improve **community-controlled capacity**

Leverage **2032 Games** for enduring legacy, not symbolic inclusion

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This Chapter summarises insights from an engagement process designed to centre local Aboriginal and Torres Strait Islander people's perspectives in regional food system planning at a time of significant population growth and major mega sporting events, including the 2032 Olympic and Paralympic Games ('2032 Games'). This highlights why and how the SEQ Food System Strategy intersects directly with the Federal Closing the Gap commitments (NIAA, 2025), particularly those relating to health, economic participation, and community wellbeing. Food security is a foundational determinant across these outcomes, shaping nutrition, health, education, and economic stability. Participants emphasised that without addressing food access, affordability, and culturally safe food environments, progress against Closing the Gap targets will remain constrained. From this perspective, embedding First Nations leadership within regional food-system planning is not only good practice, but a necessary condition for meeting shared policy commitments.

An outline of methods and terms used in this section are summarised in Chapter 6.3 of this report. These insights were gained through two facilitated roundtables:

- **Roundtable 1: First Nation Food Enterprises and Innovation Leaders**, which focused on economic participation, supply chains, native foods, infrastructure, and future opportunities (convened by Dr Gaala Watson).
- **Roundtable 2: Community and Service Delivery Perspectives**, which focused on lived experience of food access and affordability, service provision, cultural safety, and system coordination (convened by Mr Kaava Watson).

## 4.1 Key insights

- Aboriginal and Torres Strait Islander peoples are not peripheral to the SEQ food system, they are central to its resilience, sustainability, and future viability.
- Across both enterprise and community contexts, participants described a system under pressure but also rich with knowledge, innovation, and care.
- There are risks associated with continuing with fragmented, short-term approaches, and opportunities to re-imagine food system planning through local Aboriginal and Torres Strait Islander governance, values, and lived experience.
- As SEQ continues to grow and prepares for major global events, the SEQ Food System Strategy represents a critical opportunity to embed Aboriginal and Torres Strait Islander people's perspectives in ways that are structural, enduring, and grounded in community reality.

## 4.2 Aboriginal and Torres Strait Islander realities in SEQ food systems

South East Queensland is home to one of the largest and most diverse urban Aboriginal and Torres Strait Islander populations in Australia (see 3.1 Population growth and food demand). While the region is often framed through narratives of growth, productivity, and opportunity, participants across both roundtables consistently highlighted a disconnect between these narratives and the lived realities of many Aboriginal and Torres Strait Islander families.

Community organisations and frontline service providers described widespread food stress affecting families across income levels, not only those on income support. Food stress is compounded by rising housing costs, transport barriers, and increasing pressure on already stretched services, particularly as population growth intensifies competition for housing and essential services.

Participants also highlighted a critical gap between lived experience and what is visible in policy, planning, and data systems. While there is strong anecdotal evidence of food insecurity across Aboriginal and Torres Strait Islander communities in SEQ, participants consistently noted that this experience is poorly captured in existing data. Much of what is known about food stress in the region is derived from mainstream service use or population-level indicators, which do not adequately reflect local experiences, particularly where families rely on informal sharing networks, community support, or avoid services due to cultural unsafety.

As a result, Aboriginal and Torres Strait Islander people's food insecurity in SEQ often remains largely invisible to those outside community contexts. Participants emphasised that food stress can be widespread yet unseen, masked by resilience, mutual support, and cultural practices of sharing that absorb pressure without triggering formal service engagement. This invisibility contributes to under-recognition of need, limits targeted investment and reinforces assumptions that food insecurity is either minimal or already addressed within existing systems.

Importantly SEQ's food challenges cannot be understood in isolation from broader systems, including housing, health, education, and other enabling infrastructure. Food insecurity is both a symptom and a driver of wider disadvantage, with direct implications for child wellbeing, family stability, and long-term health outcomes. Even so, roundtable participants cautioned against deficit-based framings. Strong cultural practices of sharing, community-led support, and First Nation-controlled organisations continue to play a critical role in sustaining families, often filling gaps left by mainstream systems. However, these informal and community-based responses are increasingly strained, raising questions about sustainability as the region grows.

Within this context, the SEQ Food System Strategy represents a critical opportunity to rethink how Aboriginal and Torres Strait Islander families and First Nation enterprises are positioned within regional food planning, not as a vulnerable subgroup to be managed, but as active collaborators, producers, innovators, and custodians of knowledge essential to future food system resilience.

## 4.3 Key themes: First Nation food enterprise perspectives

### 4.3.1 First Nation enterprise as cultural, economic, and environmental practice

First Nation food businesses cannot be understood solely through a commercial lens. Many enterprises operate with dual objectives: generating income while also supporting cultural transmission, employment pathways, and environmental stewardship. Participants highlighted native foods, regenerative practices, and culturally informed land management as areas where First Nation enterprises offer

***A First Nation food enterprise is deeply connected to culture, Country, and responsibility to community.***

distinct value within the broader SEQ food system. However, these contributions are often marginalised or overlooked within mainstream supply chains, procurement systems, and policy frameworks.

### 4.3.2 Infrastructure, scale, and market access constraints

Structural and institutional barriers that limit the growth and sustainability of First Nation food businesses. These include lack of access to capital, appropriate infrastructure, difficulty scaling production while maintaining cultural integrity, and challenges navigating regulatory and procurement systems. Roundtable participants expressed a strong interest in regionally coordinated infrastructure and shared platforms that could support First Nation enterprises to aggregate, process, and distribute products without losing control or ownership.

***Participants stressed that 'innovation' should not be equated solely with technological solutions. For many First Nation enterprises, innovation lies in revitalising traditional practices, developing ethical supply chains, and embedding cultural values into contemporary markets.***

### 4.3.3 2032 Games and population growth as double-edged catalysts

Population growth and the 2032 Olympic and Paralympic Games ('2032 Games') are significant inflection point. While these scenarios offer opportunities to invest in First Nation-led food systems and legacy outcomes, roundtable participants warned that existing procurement models often overlook smaller and Traditional Owner suppliers, risking short-term or extractive engagement rather than meaningful, long-term investment. First Nation enterprise participants cautioned against one-off showcases or symbolic inclusion. Instead, they called for commitments that build enduring capability, governance, and market access beyond the 2032 Games.

***There was strong alignment between enterprise and community participants on the need for local Aboriginal and Torres Strait Islander voices to be involved early and structurally in planning processes, rather than consulted once decisions are already set.***

## 4.4 Key themes: Community and service delivery perspectives

### 4.4.1 Food stress as a whole-of-system issue

Participants consistently described food insecurity not as an isolated problem, but as one that is inseparable from housing affordability, cost-of-living pressures, access, health, and family wellbeing. Rising rents and population growth were identified as key drivers, forcing families to prioritise housing and utilities over food.

***Families often avoid accessing mainstream services or food support due to fear of judgement and discrimination.***

Service providers observed that food stress now affects families across income levels, including those in paid employment. As one participant noted, "this isn't just people on welfare, it's affecting all levels of our community." For many families, food becomes the variable expense once fixed costs such as rent, electricity, fuel, and childcare are met.

These pressures mean that food insecurity rarely presents early or in isolation. Participants described families "struggling quietly" until situations become critical, at which point food stress is embedded within

broader crises affecting housing, health, and family stability. This dynamic pushes services into constant crisis response, exacerbates workforce strain, and highlights the limitations of addressing food insecurity without tackling its structural drivers.

### 4.4.2 Access barriers: Transport, geography, and affordability

Transport was identified as a major constraint, particularly for Elders, people with disabilities, and families without private vehicles. Many food support services are not easily accessible by public transport and operate within limited hours, making them difficult to reach for those with competing responsibilities.

***While mainstream food support services exist across SEQ, there are significant barriers to accessing them in practice.***

Isolated communities, such as those situated on islands and in remote areas, face additional challenges in food accessibility. Participants noted that the cost and logistics of ferry access, combined with higher food prices on islands such as Minjerribah (Stradbroke Island), further restrict food access. In these contexts, food availability does not equate to accessibility, as the cost, time, and logistics involved can render support unusable.

Participants also highlighted food affordability as a distinct access barrier in more regional locations. Higher food prices, limited retail options, and additional costs associated with transport and supply were described as compounding pressures for families already managing rising living costs. These conditions were seen to reduce the reliability of access to affordable, diverse and nutritious food.

### 4.4.3 Shame, stigma, and cultural safety

A strong theme across the roundtable was the role of shame and cultural unsafety. Families often avoid accessing mainstream services or food support due to fear of judgement and discrimination. This extends beyond formal services into everyday food access. Participants spoke about the surveillance of Aboriginal and Torres Strait Islander people in mainstream supermarkets, where individuals may feel watched, targeted, or unfairly suspected, even when they are there to pay for food. This experience was described as a form of systemic discrimination that shapes how safe or unsafe food spaces can feel.

***Participants stressed that cultural safety is not symbolic, but relational: "Not artwork on the walls, but how people are treated."***

For young people in particular, shame was identified as a powerful deterrent. Students living independently may choose to go without food rather than be seen asking for help or taking food home.

### 4.4.4 The role and limits of community-controlled organisations

Community-controlled organisations were consistently described as trusted first points of contact for families experiencing food stress. Many participants noted that families are more likely to seek support from services they already have relationships with, such as schools, First Nation health services, or other community organisations, before approaching mainstream providers.

***As one participant noted, these organisations are "asked to do a lot with very little," raising concerns about sustainability as demand continues to rise.***

Participants also highlighted that these organisations are carrying an increasing burden without commensurate

resourcing or infrastructure. Community-controlled organisations are often expected to respond to immediate food needs, while also navigating fragmented funding arrangements and system-level constraints beyond their control.

### 4.4.5 Workforce pressure and fragmented service systems

Frontline workers described significant pressure within the service system, including increasing demand, static staffing levels, and short-term funding arrangements. Participants spoke about burnout, staff turnover, and the emotional toll of working beyond paid hours to ensure families are safe.

Fragmented funding and reporting requirements were identified as a major barrier to coordinated responses. The impact of having no continuity of care for those accessing these services is also an important driver of disengagement from support services and subsequent worsening of individual outcomes. Participants emphasised that this erodes trust and contributes to disengagement, particularly for those who have already experienced discrimination or institutional harm.

***Services are often funded to address specific issues in isolation, even though families experience food insecurity alongside housing stress, health challenges, and financial instability.***

## 4.5 Cross-cutting insights and strategic implications

Across both themes, several shared insights emerged:

- Food insecurity in SEQ is shaped by systemic factors, not individual behaviours.
- Cultural safety and trust are foundational to effective food system participation.
- Community-controlled organisations and First Nation enterprises are central actors yet remain under-resourced.
- Fragmented systems undermine both service delivery and enterprise development.
- Major growth and event-driven investment present risks if Aboriginal and Torres Strait Islander people's participation is not embedded from the outset.

Participants consistently argued for a coordinated Aboriginal and Torres Strait Islander voice in SEQ food system planning, one that reflects the scale, diversity, and lived realities of Aboriginal and Torres Strait Islander communities across the region.

## 4.6 Recommendations

### First Nation-led infrastructure and system coordination

Addressing food insecurity and First Nation economic participation will require coordinated, First Nation-led solutions that extend beyond fragmented or short-term interventions.

This points to the need to:

- Invest in the development of First Nation-led food infrastructure models, including a First Nation foodbank approach, that moves beyond short-term relief and enables coordinated, culturally safe food access across SEQ.

- Strengthen coordination across Aboriginal and Torres Strait Islander food systems by developing a state- or region-wide Native Foods Strategy that supports First Nations producers, protects cultural knowledge, and establishes consistent, culturally appropriate procurement pathway.

## Embed Aboriginal and Torres Strait Islander governance within food system planning

Aboriginal and Torres Strait Islander people's participation in food systems cannot be limited to consultation or project-based engagement. Instead, there is a need for structurally embedded Aboriginal and Torres Strait Islander people's participation within regional food system planning.

This includes:

- Early involvement in strategy design, not only implementation.
- Clear mechanisms for ongoing engagement beyond individual events or funding cycles.
- Recognition of the diversity of Aboriginal and Torres Strait Islander communities across SEQ, including urban, peri-urban, regional, and island contexts.

There is a gap in coordinated spaces where Aboriginal and Torres Strait Islander communities and First Nation organisations across SEQ can connect, share initiatives, and collectively shape food system priorities. Addressing this gap was seen as foundational to improving both enterprise development and community food security outcomes.

## Address food access as a systemic issue not an individual issue

A consistent message from community and service providers was that food insecurity must be understood as a system-level issue shaped by housing costs, transport, income adequacy, service fragmentation, and discrimination.

This suggests the importance of:

- Integrating food system planning with housing, transport, health, and social infrastructure considerations.
- Recognising access barriers that disproportionately affect Elders, people with disability, carers, and regional and island communities.
- Avoiding deficit-based narratives that frame food insecurity as a matter of individual choice or behaviour.
- Informal systems of sharing and community support continue to play a critical role, but are increasingly stretched as population growth intensifies pressure on families and services.

## Prioritise cultural safety across food environments

Cultural safety emerged as a cross-cutting consideration that shapes how Aboriginal and Torres Strait Islander people engage with both services and everyday food environments. Experiences of surveillance, discrimination, and judgement, including in mainstream community services and retail settings, were described as barriers to safe and dignified food access.

This points to the need to:

- Incorporate cultural safety as part of food environment design, service delivery, and operational settings.

- Shift from symbolic inclusion to accountable, relational approaches that shape how people are treated in practice.
- Acknowledge that stigma, mistrust, and fear of judgement can deter access to food support, even when services exist.
- Culturally unsafe environments undermine not only food security, but broader health and wellbeing outcomes.

## Strengthen and sustain community-controlled capacity

Community-controlled organisations were identified as critical anchors within the SEQ food system, particularly for families experiencing food insecurity. These organisations hold trust, cultural legitimacy, and deep local knowledge, yet are often expected to respond to increasing demand without adequate resourcing or authority.

This includes:

- Supporting flexible and longer-term funding arrangements that allow services to respond to real-time needs.
- Reducing administrative and reporting burdens that fragment service delivery.
- Recognising the role of community-controlled organisations as system partners, not crisis-only services.
- Without sustained investment, the current reliance on community-controlled responses risks becoming unsustainable.

## Support First Nation-led enterprise and cultural food stewardship

Enterprise participants highlighted the need for policy and investment settings that recognise First Nation food enterprises as cultural, economic, and environmental contributors.

This includes:

- Supporting Indigenous knowledge and First Nation-led innovation that aligns with cultural values, not just commercial scale.
- Investing in shared infrastructure, aggregation models, and procurement pathways that maintain Aboriginal and Torres Strait Islander people's ownership and control.
- Recognising native foods, land care programs, and education initiatives as part of the broader food system, not peripheral activities.
- First Nation enterprises are already contributing to resilience, sustainability, and community wellbeing, but often without visibility or structural support.

## Leverage population growth and the 2032 Games for long-term legacy

Participants identified population growth and the 2032 Games as pivotal moments for the SEQ food system. While these were seen as opportunities for investment, procurement, and long-term legacy, participants cautioned against approaches that overlook local realities. As one participant reflected, "We are going to have all these international people coming here for the Olympic Games while our mob are here starving."

This sentiment highlighted the view that any food-system legacy associated with 2032 must deliver tangible improvements in food access and wellbeing for Aboriginal and Torres Strait Islander communities, rather than symbolic or extractive outcomes. Participants expressed cautious optimism that, if local Aboriginal and Torres Strait Islander people's participation is embedded early and meaningfully, these drivers could catalyse lasting, change across the SEQ food system.

This requires:

- Ensuring that First food enterprises and local Aboriginal and Torres Strait Islander communities are involved in legacy planning, not just event-based opportunities.
- Avoiding extractive or symbolic approaches that deliver short-term visibility without long-term benefit.
- Using major investments to build enduring capability, infrastructure, and governance that extend beyond 2032.

Legacy should be measured not by temporary inclusion, but by sustained outcomes for communities and enterprises.

The insights shared through these roundtables reinforce that Aboriginal and Torres Strait Islander peoples are not peripheral to the SEQ food system, they are central to its resilience, sustainability, and future viability. Across both enterprise and community contexts, participants described a system under pressure but also rich with knowledge, innovation, and care. They highlighted the risks of continuing with fragmented, short-term approaches, and the opportunity to re-imagine food system planning through Aboriginal and Torres Strait Islander people's values and lived experiences.

As SEQ continues to grow and prepares for major global events, the SEQ Food System Strategy represents a critical opportunity to embed Aboriginal and Torres Strait Islander people's perspectives in ways that are structural, enduring, and grounded in community reality. Doing so will not only strengthen food security for Aboriginal and Torres Strait Islander peoples, but contribute to a more just, resilient, and connected food system for the region.

SNAPSHOT

# 5 Delivering a Sustainable Menu for Mega Sporting Events

Cathy Robinson, Nikki Dumbrell, Lilly Lim-Camacho and Peggy Schrobback

Mega sporting events radically intensify demand, revealing both vulnerabilities and opportunities in the SEQ food system.

Athletes and spectators have different needs: menus, standards, safety, cultural preferences, and service models must reflect these differences.

Success requires whole-of-system coordination, not isolated procurement or catering decisions.

Winter seasonality and inter-regional dependence shape what a "Games-ready menu" will realistically look like.

Local exemplars already exist: scale what works through equitable procurement, shared infrastructure, and storytelling.

Sustainability is a competitive advantage and legacy opportunity. The Games can reposition SEQ as a global leader in sustainable, resilient food systems.

## OPPORTUNITIES

- **Processing pathways** (e.g., frozen, cold-storage) to ensure Queensland flavours, such as tropical fruits, are available during Games-time
- **Multi-agency, cross-sector coordination**, shared standards, and data to ensure food supply can be adequately met
- Leverage **agritourism and event-linked experiences** to lift regional brands and connect

## CHALLENGES

- **Tourism spikes during 2032 Games-time** will occur when SEQ relies on other regions for many fruits and vegetables
- Without **early, structural inclusion**, legacy outcomes for communities and enterprises may fail to materialise
- **Climate or logistics disruptions** could **strain supply**; plans should include preservation (freezing/cold storage) and alternative sourcing

Mega sporting events such as the 2032 Olympic and Paralympic Games (the '2032 Games') present both a significant opportunity and a complex challenge for the SEQ food system. In this section, we draw on insights from Chapters 3 and 4, along with forum discussions and available reports, to highlight potential innovations and interactions across the SEQ food system that can support the region to manage—and benefit from—the challenges and opportunities created by the 2032 Games.

The 2032 Games can act as a platform to recognise that the food system sits at the intersection of natural, cultural and human systems, and plays a critical role in achieving social, economic and environmental sustainability outcomes. Sustainability is a formal requirement within the contract between Olympic host cities and the International Olympic Committee (IOC), which seeks alignment with the IOC roadmap to 'build a better world through sport', demonstrate a 'responsibility to contribute to global sustainability efforts', and maximise positive social, environmental and economic impacts (IOC, 2021). Debate over the sustainability performance of past Olympic and Paralympic Games (Müller et al., 2021) has amplified interest in co-designing place-based measures that not only meet IOC expectations but are also supported by the local communities and industries who host and are most affected by these mega-events.

***If we're smart, we can use the Games as a catalyst—building a coalition around just transitions, agreeing on shared standards, and making sure food voices are properly represented, not sidelined.***

**– Food Connect Forum**

## 5.1 Key insights

- Mega events like the 2032 Games will add a temporary surge to SEQ's already growing population and will require integrated food system planning and innovation to manage and benefit from the Games.
- Understanding and extending the current food procurement systems in place, highlighting and learning from existing events and procurement strategies and investing in sustainable agriculture and food experiences can help to gear the food system for the 2032 Games and beyond.
- SEQ will rely on local systems and other regions to curate a winter menu for athletes, spectators, supporters and the local population during the 2032 Games.

## 5.2 Sporting mega events and food

***Hosting Queensland's 2032 Olympic and Paralympic Games will be one of the most significant boosts to tourism since Expo '88. The Games are expected to generate a $4.6B boost to tourism and trade, bringing benefits for regions and cities right across the state.***

**- Queensland Government, 2025b, p.7**

SEQ has hosted several sporting mega events in the past, each attracting different levels of visitation. For example, the Gold Coast 2018 Commonwealth Games attracted approximately 424,200 visitors (including 239,692 local, 149,826 domestic, and 38,695 international visitors; Queensland Government, 2019). Such mega events generate exceptionally high and concentrated demand for food because they bring together large numbers of spectators, athletes, staff, volunteers, media personnel, and tourists over a short period of time. This results in a temporary but intense surge in food consumption across venues, transport hubs, accommodation precincts, and surrounding communities. The resulting demand spans the full spectrum of food services, e.g., from quick service outlets and mobile vendors to cafés, restaurants, supermarkets, and

large-scale catering operations. Despite this, there is currently limited information available on the type, source, and volume of food offerings at these events, as well as the associated levels of food waste.

For the 2032 Games, a visitor number of between 3 million and 11 million could be expected, based on attendance at recent Olympic and Paralympic Games. For example, Paris 2024 recorded 3.1 million tourist arrivals and an estimated 11.2 million total visitors to the Games (*Figure 21*; PTRD, 2024). This number of total visitors includes the close to 10,500 athletes competing in the Olympics and 4,400 competing in the Paralympics.

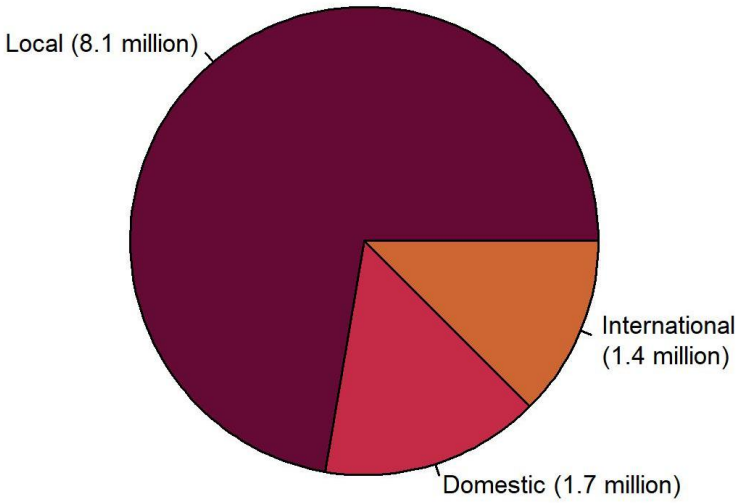



***Figure 21* Visitor numbers at the Paris Summer Olympic and Paralympic Games. Local visitors included day-trippers and Île-de-France residents. Source: PTRD (2024).**

The food demand at sporting mega events is different for athletes and spectators (Piggin et al. 2019) and generally shaped by factors such as (Pelly et al., 2023):

- High visitor number and peak-time surges (e.g., high-capacity food outlets, rapid service models, extended opening hours).
- Diverse dietary needs and cultural preference of visitors from interstate and overseas (e.g., culturally diverse foods, vegetarian, vegan, halal, and allergen friendly options, familiar staples for international athletes, support teams and officials).
- Increased demand across the whole region beyond event venues (e.g., hotels and short-stay accommodation, local restaurants and cafes, supermarkets and convenience stores, night markets and pop-up food precincts).
- High expectations for quality, safety and consistency (e.g., reliable procurement, pre-approved suppliers, large scale catering operations for athletes and officials).
- Legacy impacts, or long-term benefits, for local food businesses (e.g., growth in multi-cultural food offerings, increased visibility of local food producers and products, tourism and hospitality demand).

Together, these factors highlight the importance of strategic food preparedness planning to ensure that both SEQ residents and visitors can reliably access food during mega events and ensure local and regional procurement targets designed to support local businesses can be met. For the 2032 Games, this will require projections of food consumption and volume requirements and waste management strategies. Further, the influx of global visitors, flexible venue planning, and enduring legacy obligations presents a unique opportunity to elevate and transform First Nation and local food systems across Queensland and the broader region.

## 5.3 2032 Games focused food system goals

***This won't work in silos. We need multi-agency, end-to-end planning that connects players across the supply chain, builds the relationships that make business work, and uses public procurement to back a more values-driven food system for the Games and beyond.***

**– Food Connect Forum**

Food visions have been created by hosts of mega events to support a sustainable lead up and legacy from Olympic and Paralympic events. For example, The Paris Games Food Vision (Paris 2024 Organising Committee, 2022) set out measures for low carbon food, food waste and management, single use plastic, local products and jobs. Targets focused on associated venues but recognised that the achievement of these food vision goals would rely on local and regional authorities and organisations.

The 2032 Games are guided by strong environmental, economic, and social sustainability principles, aligning with global best practice for mega-sporting events. As a 'Games for the Region' the event also includes commitments to create lasting benefits for communities, environments and economies from Queensland to the entire Pacific region. As required by the IOC, the 2032 Games has demonstrated its sustainability credentials to secure the bid and developed a legacy strategy – Elevate 2042 – with a framework for long-term impact beyond 2032. Key food system related themes in the legacy strategy are in *Table 17*.

***Table 17*** **Transformation themes and focus areas related to food systems in the Elevate Strategy.**

| Socio-economic benefits | Local foods values | Sustainability |
|---|---|---|
| • The Games offer opportunities to build our innovation systems and create next generation opportunities which play to our strengths in sport, biomedical, agriculture, tourism and the creative industries (p.19)<br>• Businesses in regional areas will play an important role in delivering the Games, including through provision of quality food and agribusiness and regional tourism (p.49) | • The Games provide a global opportunity to celebrate what is special about our region and signal the culture and values of our community to the world (p.4)<br>• Enabling more meaningful engagement with Indigenous communities across Oceania could progress knowledge exchange about environmental issues, promoting new trading and cultural relationships (p.31)<br>• The Games presents opportunities to recognise and celebrate the unique cultural, environmental and creative qualities or experiences of cities and regions across Australia, including our reputation for safe and quality food production (p.48) | • Recognising the significance of agriculture land practices across Australia, the Games creates the impetus to further our sustainable practices, including carbon sequestration and regenerative agriculture processes in food and fibre production (p. 41).<br>• By combining traditional wisdom and understanding with leading edge science and technology, we can co-create new knowledge systems leading to increasingly regenerative land and water management practices (p.38)<br>• Hosting a sustainable Games in 2032 also offers the opportunity to advance progression towards circular cities and regions (p.39) |

Source: Department of Tourism and Sport (2023).

**Food system priorities for mega events like the 2032 Games as identified in forums held as part of the SEQ Food System Strategy development**

**Socio-economic benefits –** To support and leave behind a legacy of innovation, entrepreneurship, and opportunity for diverse actors within the food economy. This includes ensuring that food insecure households are not left behind during periods of heightened demand. By 2032, food production and supply will be a driver of regional prosperity, powered by smart technologies and food products that support local businesses and showcase unique ingredients and practices. Local food businesses, small scale producers, and global exporters will thrive in an inclusive, resilient food economy where farmers and First Nation knowledge holders are supported through innovation and global connections that create new value for communities across Queensland and beyond.

**Sustainability benefits –** Mega events like the 2032 Games should leave a First Nation and local food legacy that demonstrates how food production can contribute to healthy ecosystems while delivering worldclass cuisine. By advancing circular food systems that minimise waste and promote nutritious food choices, mega sporting events can position Australia as a global leader in environmentally responsible food production and consumption—setting a new benchmark for how major events can drive sustainability through food.

**Connecting food, people and places** - Through procurement and partnership pathways, sourcing food from First Nation and local enterprises requires a collaborative, systems-based approach grounded in local values and relationships that connect people with place. As a result, SEQ's food systems will stand as a legacy of connection—linking local producers, communities, and global visitors. Through negotiated actions and collaborations, First Nation and local food systems will be strengthened in ways that connect individuals to each other, to their surroundings, and to the rich cultural and environmental heritage of Brisbane, Queensland, Australia, and the Pacific.

Achieving a 'Games for the Region' also requires recognising that local and Aboriginal and Torres Strait Islander food systems are grounded in values, place-based relationships, business models, stewardship practices, and knowledge systems that shape how food is produced, consumed, shared, sold, and owned. These aspirations also honour and uphold food sovereignty—the right of communities, particularly Traditional Owners and local producers, to define, control, and sustain their own food systems. Planning for the 2032 Games and beyond therefore must encompass how food is sustainably and equitably produced, distributed, and consumed in culturally, ecologically, and economically positive ways.

## 5.4 The Winter Menu for the 2032 Games

***Being Games-ready means knowing exactly what's needed—how much food, what kind, and what we can realistically supply. That includes understanding First Nation and local business capacity, valuing what we already grow, planning for season and climate, and being honest about how fragile the supply chain really is.***

**– FAN Forum**

Mega events like the 2032 Games add a temporary surge to SEQ population that creates unique opportunities and challenges to SEQ food systems (*Figure 22*). A food systems approach to feeding a growing population, alongside large numbers of visitors during the winter months of the 2032 Games can draw on the insights in previous parts of this strategy and can guide the coordination and actions required.

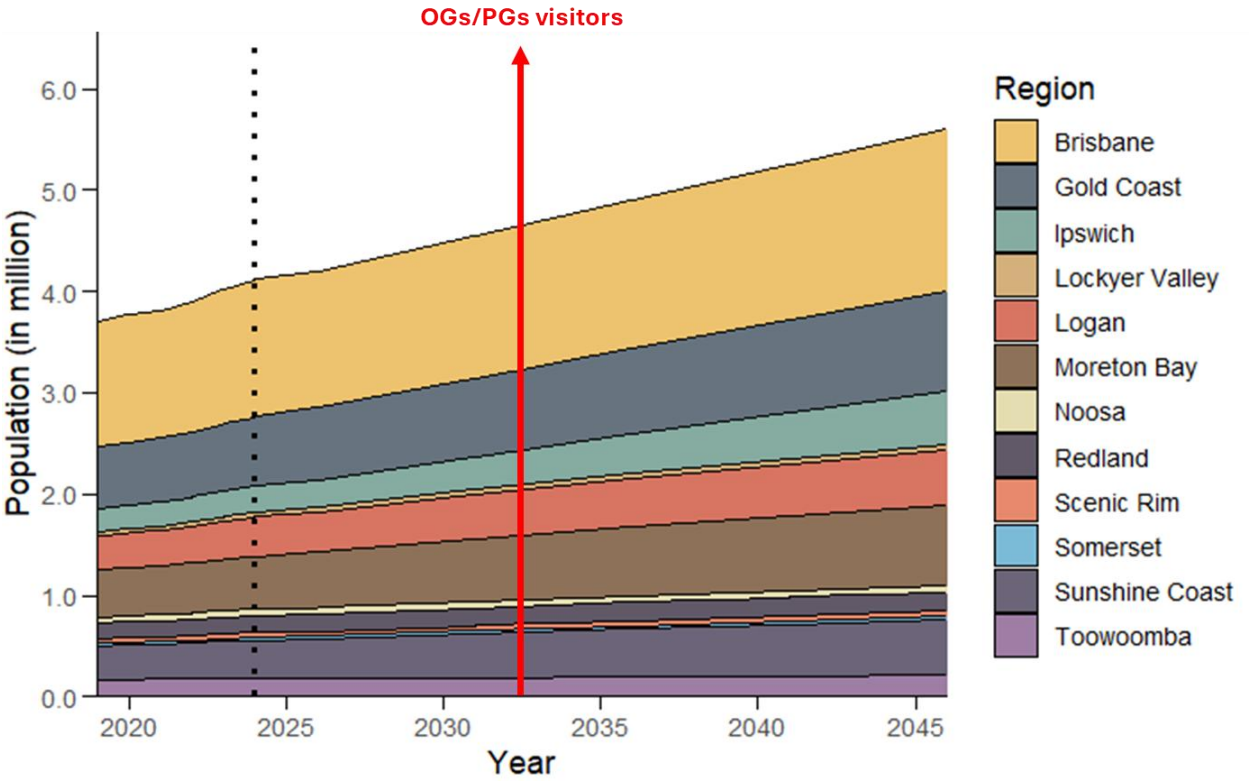



***Figure 22*** **Mega events like the 2032 Olympic and Paralympic Games (OGs/PGs) will add a temporary surge to SEQ's already growing population. See also *Figure 6*.**

A range of approaches are required to gear the food system to feed and underpin positive experiences as part of the 2032 Games, and beyond. These approaches include, among other things:

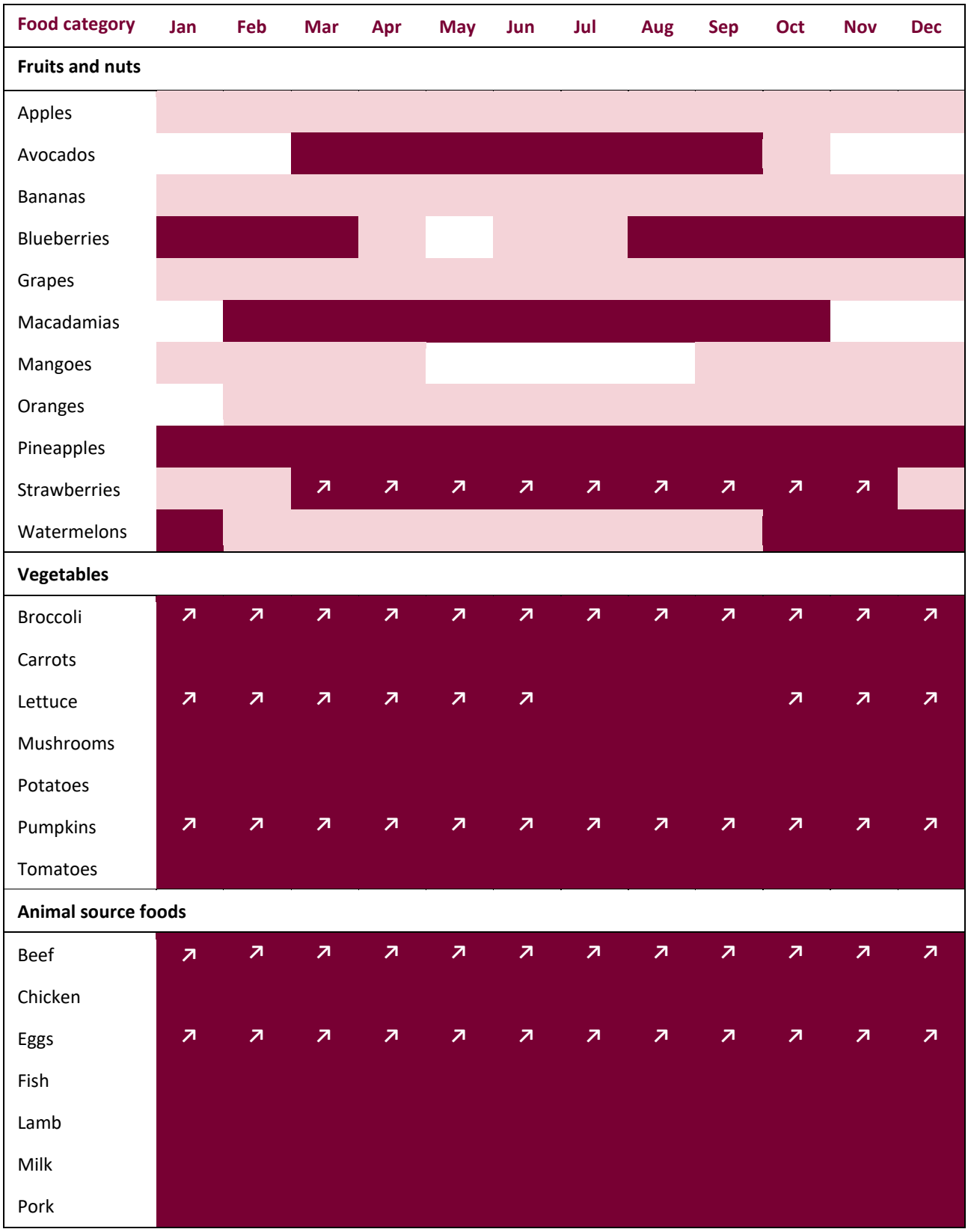
- Understanding and extending the current food procurement system in place in winter (the 2032 Games will be held across late July, August and early September) in SEQ.
- Highlighting and learning from existing events and procurement strategies.
- Investing in sustainable agriculture and food experiences and understanding the co-benefit opportunities associated with this.

## Understanding the current food procurement system

The current food procurement and distribution system in place in SEQ is complex. The quantity and quality of food available is influenced by seasonal conditions and interregional food distribution networks. *Table 18* indicates the availability of key produce in SEQ and the extent that these can be sourced from SEQ or brought in from other regions either in key seasonal windows, or for year-round availability. This high-level summary highlights the extent that SEQ is dependent on other regions to meet demand for fresh produce throughout the year, including the winter period when the 2032 Games will be held.

Key fruits, such as apples, bananas, grapes and oranges, are typically sourced from growing regions outside SEQ, including from neighbouring regions in Queensland, e.g., key apple and orange production areas border the SEQ region. Pineapples are grown in SEQ year-round with supply supplemented with produce from other Queensland regions to meet demand in SEQ. Year-round availability is aided by different varieties. Likewise, efforts are underway to bring Queensland blueberry production earlier in the winter where product is scarce and sought from elsewhere. More strawberries are grown in SEQ than consumed, and thus exported to other regions, through autumn, winter and spring.

*Table 18* **Seasonal availability of selected fresh food products in South East Queensland. White indicates not available, pink shading indicates products are available, and plum shading indicates products in season and sourced from SEQ are available. White arrows indicate more product leaving SEQ (to domestic or international markets) than entering SEQ.**




Notes: Availability does not indicate quantity or quality of product available. Seasonality and availability accounts for the main varieties grown in SEQ and surrounding areas. Sources: Australian Government and CSIRO (2025); Sunshine Coast Regional Food (n.d.); Queensland Government (2016).

SEQ produces sufficient broccoli, broccolini and pumpkins to supply SEQ and other regions year-round. Mushrooms are grown year-round in SEQ in controlled environments and thus not subject to seasonal conditions like other products. However, supply is supplemented from other regions to meet demand. This is the same for tomatoes, carrots and potatoes. SEQ produces key animal source foods (meat, milk, eggs) year-round, with excess eggs and boxed beef such that more of these are exported from the region than imported. The excess supply of beef is likely due to the concentration of finishing feedlots as well as processing facilities in the region (see also *Table 7*). While some sheep meat and milk is produced in the region (see also 3.2.1), SEQ relies heavily on imports of both from other regions to meet local demand.

If the 2032 Games coincides with a poor growing season for SEQ produce, reliance on other regions may increase. Likewise, if poor growing season conditions arise in regions that SEQ is dependent on, or natural disasters or other shocks interrupt timely transportation of goods from other regions, SEQ may need to source inputs from new markets and supply chains and rely on preparation to ramp up local supply to match supply with demand at the time of the event. Processing pathways, including freezing and using cold storage for produce that can be effectively preserved, will also have a key role to play to ensure classic Queensland flavours, e.g. tropical fruits, are available in SEQ at the time of the 2032 Games.

## Highlighting and learning from existing events and procurement strategies

Local produce and goods can be a feature of equitable and inclusive procurement agreements and targets with food supply partners engaged in mega events (e.g., Queensland Government, 2026b). Building on existing efforts to support local food through festivals and sporting events provides valuable lessons for how local produce and products might be showcased during the 2032 Games. Chapter 2 already highlights a range of initiatives underway across the region.

One example is the Scenic Rim Eat Local Month initiative (see also LGA Insights: Scenic Rim), which offers a model for celebrating and elevating local food. Each June, the Scenic Rim hosts a month-long food and farming festival featuring award-winning produce, farms, wineries, distilleries, and paddock-to-plate experiences. The event provides local producers and Scenic Rim Food Ambassadors with opportunities to connect with the community and share their expertise and passion. Further, several local businesses and councils are already advancing inclusive procurement practices with a strong emphasis on local goods (see LGA Insights: Ipswich).

On the Sunshine Coast, White's IGA, a family-owned independent supermarket group, established its distinctive Locavore program in 2013 to support local producers and strengthen connections with customers (see also LGA Insights: Sunshine Coast). White's IGA stores source around 35% of their goods from local growers, producers, and independent suppliers, using a trademarked "tractor" emblem to identify locally grown or made products. The program now partners with more than 200 Sunshine Coast suppliers and contractors. Lessons learned from these initiatives (and others) can support the preparation for the 2032 Games.

## Investing in sustainable agriculture and food experiences

***This is an opportunity to lift our whole event-food system—resourcing producers, connecting them through tourism and agritourism, managing waste better, and making sustainability visible, so the benefits last well beyond the Games.***

**– Food Connect Forum**

Investment in the sustainable agri-food sector, and readiness to report and evidence sustainability credentials, can support the agri-food sector to engage with and meet sustainability and procurement requirements for the Games as well as transition the food system for long-term benefits. Investment in sustainability and readiness in the agri-food sector is also an opportunity to create co-benefits for the tourism sector, the environment and communities.

Agricultural industries in Australia and Queensland are investing in sustainability frameworks to measure and communicate their sustainability (environmental, social, economic) to communities and markets. At the same time, The Queensland Land Restoration Fund is investing in sustainable agriculture in SEQ and across the state by supporting and incentivising landholders to maintain agricultural production, deliver on environmental priorities and support socio-economic co-benefits (Dumbrell et al., 2026). Understanding and measuring co-benefits for other industries and for other community priorities, such as the capacity building and advancement of First Nation businesses, can be used to align with mega sporting event requirements as well as support involvement in new and emerging sustainability markets.

Further, Queensland's Destination 2045 Tourism Strategy notes that tourism supports one in 11 jobs in Queensland and identifies ecotourism as a key focus area of supported initiatives, including the 2032 Games. This includes "boost agritourism with more farm stays and experiences, helping farmers diversify and improve farm profitability" (Queensland Government 2025b, p. 16). Measures of success set out in the strategy to achieve these goals include: (1) work with local governments to identify and reduce red tape to encourage investment into agritourism and tourism clusters; and (2) leverage new agritourism experiences into food and farm experiences to drive domestic and international visitation.

## 5.5 Summary

Goals and measures of success outlined in mega event and tourism food visions and procurement programs aim to support a thriving food system grounded in First Nation and local knowledge, practices, products, and values. Forums held as part of this Strategy emphasised the importance of ongoing capacity building, knowledge exchange, innovative business models, and collaborative partnerships that empower food enterprises, communities, and traditions.

Inclusive and equitable procurement pathways—aligned with mega-sporting event policy frameworks—are essential to ensuring a sustainable leadup to, and legacy from, these events. This includes benchmarking and promoting best practice in ESG aligned (Environmental, Social, Governance) and Reconciliation Action Plan aligned food procurement and capacity building. It also requires identifying and measuring the social, cultural, environmental, and economic co-benefits generated through investment in First Nation and local food enterprises.

> ***It starts with mapping who's in the system and what they're capable of, then backing them with the right planning, ESG support, and supply-chain coordination. There's a lot happening already—we just need to join the dots.***
>
> **– FAN Forum**

## 5.6 Knowledge gaps

- Lack of benchmarks and tracking systems: There is currently no method to track the presence, diversity, and scale of First Nation and local food products, practices, enterprises, and networks in a region or delivering to a mega event. New measures are needed to capture the unique value of products and partnerships, particularly those involving First Nation and local farmers and suppliers. This requires

approaches that recognise the relational nature of food systems and the role of inclusive procurement, supply chains, and collaborative regional networks.

- Need for a tiered sustainable procurement system: A tiered framework for sustainable food procurement, reporting, and partnership requirements would enable agrifood businesses of different sizes to demonstrate how their products and supply chains benefit local and First Nation food stewards, businesses, and providers.
- Limited data on event related food demand and waste: There are no verified records of food volumes, types, sources, or waste associated with past major events, nor projections for future events such as the 2032 Games. Research is needed on food types, origins, volumes, and consumer preferences at annual local mega events to inform strategic food preparedness for 2032.
- Insufficient understanding of legacy impacts: The long-term impacts of mega events on local and First Nation food businesses, supply chains, and infrastructure is unclear. The impact of different approaches to planning and organising the lead up to mega events on legacy outcomes sought by local and Aboriginal and Torres Strait Islander communities is also difficult to describe and quantify.

# 6 DATA AND METHODS

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This Strategy draws on insights from a range of data sources. The overarching approach to develop this Strategy is summarised in Chapter 1, with details of data collection and analyses outlined below. Through this approach, areas were identified where the evidence base is strong, accessible, and easy to interpret, as well as areas where data is missing, outdated, or difficult to obtain. Key knowledge and data gaps are included at the end of each section of Chapters 3 and 5. It also ought to be noted that gaps in the evidence base for food system planning and interventions are not unique to Australia (e.g., Smith et al., 2025).

## 6.1 Co-production and co-design methods

Regional food system strategies require multiple perspectives and knowledge sources to be negotiated, assessed, and applied. To address this, the team used co-design and co-production methods to bring together diverse forms of expertise and knowledge to inform the strategy (cf. Robinson et al., 2022). This work was guided by locally defined and institutional research protocols, including CSIRO Human Research Ethics approval (reference 003/23), as well as community, Aboriginal and Torres Strait Islander, grower, and Council-led governance processes. These governance arrangements shaped research activities and outcomes and safeguarded the principles of free, prior and informed consent. The approach deliberately attended to regional and local contexts to guide how collaborative, data driven evidence could be negotiated and generated. Key components of the SEQ Food System Strategy were co-developed through processes designed to centre diverse knowledge practices, incorporate lived experiences, and reflect the values of a wide range of stakeholders.

CoMSEQ approached CSIRO following the May 2025 *Dirt Track Brisbane Olympic Games Legacy Vision for Indigenous and Local Food Systems* event (https://youtu.be/exXlc3CPNc4) with an interest to explore the development of a SEQ Food System Strategy. The content of the Strategy, associated goals (*Figure 2*), and governance arrangements were negotiated with CoMSEQ Council members through forums outlined in Chapter 1 of this report. This included one-on-one discussions with mayors and council officers attending the CoMSEQ Local Government Forum in Brisbane (n=23). Additional meetings were held with local council representatives through face-to-face or online sessions brokered by CoMSEQ staff. Each council received an overview of the SEQ Food System Strategy goals and was invited to reflect on both population growth and mega event scenarios (see *Figure 1*). Councils then arranged relevant officers and/or stakeholders to participate in meetings with CSIRO and CoMSEQ team members (n=57).

Forums co-hosted in Brisbane (n= 43) with the Food and Agribusiness Network and the Food Connect Foundation enabled key organisations to invite appropriate agri-food representatives to contribute (total n=127). Two three-hour online Aboriginal and Torres Strait Islander roundtables were co-designed with Cathy Robinson, facilitated by Gaala Watson and Kaava Watson, with the aim to support First Nation food businesses, producers, and Aboriginal and Torres Strait Islander community members to share their insights to meet the SEQ Food System Strategy goals.

All engagements were semi-structured with a focus on priorities, perspectives and experiences of participants, and identification of information or existing reports that could inform the Strategy. Informed consent was received from all participants prior to data collection activities. CSIRO team members who attended or co-facilitated engagements documented all meetings, and these notes were then compiled and reviewed by all team members for accuracy and thematic analysis.

Relevant reports used in this report were shared by workshop participants and council officers, or sourced through a review of food, sustainability, tourism, 2032 Games, agricultural, environmental and food strategy materials.

Draft LGA insights (Chapter 2) that drew on relevant reports and insights gained from council engagements and forums were sent to councils for review in December 2025 and finalised in January 2026.

## 6.2 Data sources and methods used for LGA insights

This section provides guidance on references used for LGA food system insights.

The SEQ food system goals informed the development of LGA insights, which were collated through discussions with local government representatives and desktop research as part of the broader collaborative research process. This work aimed to build an understanding of the current state of the SEQ food system, identify opportunities to better recognise and manage food values across the region, and highlight gaps and biases that may influence food system priorities, pressures, and interactions. Draft LGA insights were shared with Local Council representatives for review and updated where required based on their feedback. All LGA insights were subsequently provided to CoMSEQ Council representatives for a final cross-regional review. The resulting evidence base guided the research team in prioritising data collection and activities and informed the final focus areas and actions presented in the Strategy (Chapter 1 of this report).

Where possible, nationally consistent, longitudinal datasets were used for population, agriculture, and economic statistics to ensure comparability and regional scale analytical potential. The following references were used for food system snapshots.

- Population profiles are drawn from ABS (2025b) region summaries which includes Census data collected in 2021. Population projections are drawn from Queensland Government (2023b) using the 2021 to 2046 (medium series). Further analysis of population growth and the resulting demand for food can be found in section 3.1 of this report. Exceptions have been made for Scenic Rim population projections, which are based on the Scenic Rim Regional Council GroMAP urban growth model as of 2025. Agricultural statistics, including land use, volume and values are drawn from ABS (2022a, b) and Queensland Government (2025d) data. Further analysis of food production, manufacturing, distribution and retail can be found in section 3.2 of this report.
- Scenic Rim GRP data is current for June 2024 and sourced from National Institute of Economic and Industry Research (NIEIR, 2025), while tourism data is sourced from Tourism Research Australia. Both are compiled and presented in economy.id.
- Food system employment statistics are primarily sourced employment and business data from Queensland Government (DPI), supplemented by available analysis from economy.id. Further analysis of employment in food-related sectors across SEQ can be found in section 3.5 of this report.

Public planning and strategy documents were identified through a combination of desk top research and through recommendations made by local government stakeholders. Documents were selected based on recency – excluding any superseded plans – and their currency, ensuring that only materials still in active use by relevant local governments were included. References to food, food-related initiatives, and broader food system aspirations were extracted regional and economic development plans, as well as industry roadmaps and corporate plans. This included:

- ShapingSEQ 2023: South East Queensland Regional Plan. planning.qld.gov.au
- State of the City 2025 report. choose.brisbane.qld.au/state-of-the-city

- Brisbane Vision 2031. brisbane.qld.gov.au/sites/default/files/Brisbane_Vision_2031_full_document.pdf
- Economic Development Strategy 2023–2027. ipswich.qld.gov.au/About-Council/Media-and-Publications/Corporate-Publications/Strategy-and-Implementation-Programs/Economic-Development-Strategy-2023-2027
- Lockyer Valley Economic Development Strategy 2020–2026. lockyervalley.qld.gov.au/our-region/economic-and-regional-development
- Logan City Council Yrban Design Framework 2022. logan.qld.gov.au/files/assets/public/v/1/planning-and-building/documents/urban_design_framework___accessible_v10d.pdf
- City of Logan: Queensland's multicultural food capital 2020–2025. docslib.org/doc/12311527/food-tourism-development-plan-2020-2025
- Logan Plan 2015. logan.qld.gov.au/planning-and-building/planning-and-development/logan-planning-scheme
- City of Moreton Bay Food and Agribusiness Industry Plan 2024–2028. moretonbay.qld.gov.au/files/assets/public/v/1/services/business/food-and-agribusiness-industry-plan.pdf
- Noosa Council Corporate Plan 2023–2028. noosa.qld.gov.au/files/assets/public/v/1/about-council/documents/corporate_plan_2023_2028.pdf
- Our Future Redland City: Corporate Plan 2026–2031. redland.qld.gov.au/About-Council/Strategy-Planning-and-Policy/Council-plans-and-financial-information/Corporate-Plan
- Redland City Council Event Specific Recovery Action Plan for Tropical Cyclone Alfred. redland.qld.gov.au/files/assets/public/v/1/business-and-investment/documents/redland_event_specific_recovery_action_plan___tropical_cyclone_alfred__a12342967_.pdf
- Scenic Rim Regional Council Agribusiness and Agritourism 10-year Roadmap 2022–2032. scenicrim.qld.gov.au/files/assets/public/v/1/our-council/administration/corporate-publications/documents/scenic_rim_agribusiness_and_agritourism_10_year_roadmap_2022_2032.pdf
- Somerset Regional Council Corporate Plan 2021–2026. somerset.qld.gov.au/files/assets/public/v/1/your-council/documents/corporate/src-corporate-plan-2021-2026.pdf
- Somerset Regional Council Operational Plan 2025–2026. somerset.qld.gov.au/files/assets/public/v/1/your-council/documents/corporate/src-operational-plan-2025-2026.pdf
- Sunshine Coast Council Stretch Reconciliation Action Plan (RAP) 2025–2028. sunshinecoast.qld.gov.au/living-and-community/first-nations-partnerships/sunshine-coast-reconciliation-action-plan
- Sunshine Coast Council Regional Economic Development Strategy (REDS) 2013–2033. sunshinecoast.qld.gov.au/council/planning-and-projects/regional-strategies/regional-economic-development-strategy-2013-to-2033
- Toowoomba Region Economic Development Strategy 2026–2031 - draft. Toowoomba Regional Council.

## 6.3 Indigenous-led approach to engage Aboriginal and Torres Strait Islander communities and First Nation enterprises

Using respectful and inclusive language and terminology is an essential component of collaborative research best practice. In consultation with facilitator Dr Gaala Watson and Chapter 4 co-authors, this report uses the term Aboriginal and Torres Strait Islander peoples when referring to local SEQ individuals, families and communities. Traditional Owners are a member of a local descent group that have certain and recognised rights and responsibilities in relation to a track of land or area of (fresh or salt) water in SEQ region. The term First Nation or Indigenous is used when referring to representative Aboriginal and Torres Strait Islander groups, enterprises or businesses. The terms Indigenous knowledge or Indigenous engagement acknowledge the unique knowledge governance systems and methods of Aboriginal and Torres Strait Islander research and methodologies (NIRAKN, 2020). Indigenous knowledge, engagement and innovation represent a rapidly growing area of research and practice both in Australia and globally.

Indigenous engagement was undertaken to inform the SEQ Food System Strategy by centring Aboriginal and Torres Strait Islander perspectives on food systems across the region. It sought to identify key issues, strengths, and priorities related to Aboriginal and Torres Strait Islander people's participation in the food system, including community-level food access and security, First Nation enterprise and innovation, and cultural food stewardship.

Two facilitated roundtables were convened: one focused on economic participation, supply chains, native foods, infrastructure, and future opportunities, the second focused on lived experience of food access and affordability, service provision, cultural safety, and system coordination. The engagement was designed to move beyond procedural consultation, pairing facilitated discussion with careful synthesis to ensure participant perspectives were accurately represented and meaningfully integrated into strategic thinking. Together, these conversations offered complementary perspectives on the economic, cultural, and social dimensions of food systems across SEQ, highlighting both existing strengths and persistent structural pressures.

Indigenous engagement adopted a culturally grounded, Indigenous-led approach that recognises Aboriginal and Torres Strait Islander peoples as knowledge holders. This responded to the project brief's emphasis on depth, cultural integrity, and moving beyond one-off consultation. Both roundtables prioritised cultural safety, voluntary participation, and respect for Indigenous Cultural and Intellectual Property (ICIP). Participants were informed about how contributions would be recorded, de-identified, and synthesised, with options to clarify or withdraw input. Analysis focused on preserving the intent and context of participant contributions, retaining verbatim language where it added clarity or depth to lived experience and systemic issues.

## 6.4 Data sources and methods used for SEQ insights

### 6.4.1 Food values and priorities in Australian food system plans

Twenty published and publicly available Australian food system strategies, plans, roadmaps, or local government policies were reviewed to obtain a qualitative assessment of the diverse range of food values and priorities across Australian food systems. These documents are included in the References. Documents across local councils, state and territory governments, and national approaches were reviewed. Priorities or objectives from each plan were categorised by the five themes from the 2023 Shaping SEQ Plan (Grow, Prosper, Connect, Sustain, Live), with an additional theme added to capture governance related objectives (e.g., local government procurement policies, advocacy, partnership development).

### 6.4.2 Population growth and food demand

The population and food demand insights in this Strategy are based on data from three main sources: (1) the Australian Bureau of Statistics; (2) FoodIQ survey; and (3) the Urban Food Planning Survey.

The projected population in SEQ for 2046 was obtained from Queensland Government (2023b), and secondary current population data was obtained from ABS (2023b, 2025a). Medium-growth projections for 2046 were selected, as they are considered the most probable growth scenario for the region.

These data were assessed, cleaned, summarised and displayed in a descriptive manner. Food security and food cost/inflation data from the ABS (2025a) were also used to compare SEQ food system conditions to broader Australian food system outcomes and conditions.

The FoodIQ survey is led by the Centre for Global Food and Resources at Adelaide University and periodically collects data from an online survey of Australian food shoppers. An online panel provider (Dynata™) administers the survey to at least 1000 respondents. For this survey quotas are set for gender, age and location (metropolitan versus other, and distribution across Australian states/territories) to ensure each sample is nationally-representative of Australian adults for these characteristics. Eligible respondents were Australian residents, 18 years of age or older, who were solely or jointly responsible for their household's food shopping. The full dataset includes responses from n=1185 individuals across Australia, and n=183 individuals in SEQ (*Table 19*). Data analysed for this Strategy was collected in August 2024. Of particular interest were questions about food expenditure, and food security questions.

The Urban Food Planning Survey was an online survey of residents in the greater Brisbane area conducted in 2021 and with all data made publicly available by Summerhayes and Baker (2022) and analysed to understand urban food planning in Brisbane (Summerhayes et al., 2024). The dataset includes 499 respondents in SEQ (*Table 19*).

For both survey datasets, ANOVA and Kruskal-Wallis tests for one-way analysis of variance by ranks were used to identify statistical differences between groups of households, e.g. households with different income levels and cultural backgrounds.

*Table 19* **Number of respondents to two surveys used as data sources.**

| Local Government Area | Food Insights Questionnaire | Urban Food Planning Survey |
|---|---|---|
| Brisbane | 58 | 244 |
| Gold Coast | 27 | 3 |
| Ipswich | 7 | 27 |
| Lockyer Valley | 0 | 4 |
| Logan | 6 | 56 |
| Moreton Bay | 28 | 92 |
| Noosa | 5 | 0 |
| Redland | 8 | 29 |
| Scenic Rim | 0 | 1 |
| Somerset | 1 | 6 |
| Sunshine Coast | 12 | 0 |
| Toowoomba | 8 | 0 |
| Brisbane, Ipswich or Somerset^ | 2 | 0 |
| Brisbane or Logan^ | 0 | 3 |
| Brisbane or Redland^ | 0 | 2 |
| Gold Coast or Logan^ | 4 | 16 |
| Ipswich or Scenic Rim^ | 0 | 6 |
| Moreton Bay or Sunshine Coast^ | 4 | 4 |
| Noosa or Sunshine Coast^ | 1 | 0 |
| Scenic Rim or Gold Coast^ | 5 | 0 |
| Scenic Rim or Logan^ | 6 | 5 |
| Somerset or Lockyer Valley^ | 0 | 1 |
| Toowoomba or Lockyer Valley^ | 1 | 0 |
| **TOTAL** | **183** | **499** |

Note: ^Locations based on postcode which covers more than one local government area.

### 6.4.3 Approach to classify household food security

Household food security status was classified based on the short form of the Household Food Security Scale (*Table 20*; Blumberg et al. 1992; USDA 2012).

- Households that responded to the below (*Table 20*) set of six questions with 0-1 affirmatives are classed as 'High or marginal food security'.
- Households that responded to the below (*Table 20*) set of six questions with 2-4 affirmatives are classed as 'Low food security'.
- Households that responded to the below (*Table 20*) set of six questions with 5-6 affirmatives are classed as 'Very low food security'.

More than half of households (59%) responded with zero affirmatives (high food security) and 9% with one affirmative (marginal food security – food insecure without hunger), and no household responded with a maximum six affirmatives. However, 10% of households recorded five affirmatives.

***Table 20*** **Classification of affirmatives for questions in the short form Household Food Security Scale.**

| Questions | Affirmatives |
|---|---|
| 1. The food that we bought just didn't last, and we didn't have money to get more | Sometimes true; Often true |
| 2. We couldn't afford to eat balanced meals | Sometimes true; Often true |
| 3. In the last 12 months, since last August did (you or other members in your household) ever cut the size of your meals or skip meals because there wasn't enough money for food? | Yes |
| 4. [IF YES above] How often did this happen—almost every month, some months but not every month, or in only 1 or 2 months? | Almost every month; Some months but not every month |
| 5. In the last 12 months, since last August, did you ever eat less than you felt you should because there wasn't enough money for food? | Yes |
| 6. In the last 12 months, since last August, were you ever hungry but didn't eat because there wasn't enough money for food? | Yes |

An ordered probit model was used to estimate the probability that a household would be classed as experiencing either 'high or marginal food security', 'low food security' or 'very low food security'. An ordered probit was selected given the ordered nature of the dependent variable, that is, there were three categories of food security, and each represented an increasing level of food security (*Table 21*). Guided by the literature and ABS (2023a), household characteristics were included as indicator variables. The summary statistics for these indicator variables are included in *Table 22*.

***Table 21*** **Estimates of associations between household characteristics and household food security status.**

| Variables | Coefficient |
|---|---|
| Male | 0.34* |
| Age | 0.02** |
| Household income | 0.07*** |
| Household size | -0.14* |
| Higher education | 0.32 |
| Employed | 0.04 |
| Born in Australia | -0.42 |
| Identify as non-Indigenous Australian | 0.40* |
| Identify as religious | -0.24 |
| Chi squared statistic | 32.63 |
| McKelvey & Zavoina $R^2$ | 0.255 |

Notes: Results based on ordered probit regression model, with model fit indicated by '/cut' scores of /cut1 -0.208, /cut2 0.982. *** indicates result is unlikely to be due to chance and therefore statistically significant at $p \leq 0.01$, ** at $p \leq 0.05$, and * at $p \leq 0.1$. Dependent variable range: 3= High or marginal food security; 2= Low food security; 1= Very low food security.

***Table 22*** **Summary statistics for household characteristics assessed for associations with household food security status.**

| Variable | Definition | Mean | Min | Max |
|---|---|---|---|---|
| Male | 1=Male; 0=Otherwise | 0.48 | 0 | 1 |
| Age | Age in years | 53.8 | 20 | 75 |
| Household income | Annual income in tens of thousands of AUD | 9.15 | 1.25 | 28.5 |
| Household size | Number of residents in household | 2.45 | 1 | 10 |
| Higher education | 1=Respondent completed post-school education; 0=Otherwise | 0.20 | 0 | 1 |
| Employed | 1=Employed (full or part time); 0=Otherwise | 0.56 | 0 | 1 |
| Born in Australia | 1=Born in Australia; 0=Otherwise | 0.78 | 0 | 1 |
| Identify as non-Indigenous Australian | 1=Identify as non-Indigenous Australian; 0=Other cultural background | 0.67 | 0 | 1 |
| Identify as religious | 1=Identify as religious; 0=Otherwise | 0.39 | 0 | 1 |

### 6.4.4 Food supply chain

#### Food commodity production in SEQ

Land use data was sourced from Queensland Government (2025a, 2025d) and ABS (2025b). The data were assessed, cleaned, summarised and displayed in a descriptive manner. No statistical analysis was performed.

Productive carrying capacity of agricultural land was calculated as follows: land area available per person = total agricultural land (ha)/population (people). Agricultural land carrying capacity was based on the SEQ population in 2024 (ABS, 2025b), the projected population in SEQ for 2046 (Queensland Government, 2023b), and agricultural land use in 2024/25 (ABS, 2025b). Projected agricultural land use in 2046 was not available. Hence, the displayed carrying capacity for 2046 is likely overstatement as urban encroachment on agricultural land is not reflected.

Information provided on food commodity production volume and value in SEQ were based on data from ABS (2022a, b), and Schrobback et al. (2015). For some of the individual food commodities listed in the raw data (ABS, 2022a), the production volume data was reported in kilograms and converted into tonnes for comparability. Data on individual food commodities were summarised by commodity categories, e.g., fruit and nuts, vegetables, cereals, etc. This was done by adding up production volumes and values of the individual communities in each commodity category.

Data on wild-caught fish harvest (DPI, 2025b) was included using the following criteria:

- Spatial grids: “V35', 'V36', 'V37', 'W35', 'W36', 'W37', 'W38', 'W39', 'X35', 'X36', 'X37', 'X38', 'X39', 'Y35', 'Y36', 'Y37', 'Y38', 'Y39', 'Z35', 'Z36', 'Z37', 'Z38', 'Z39';
- Longitude: >=142.5;
- Fishing methods: Line, Net, Trawl, Fish Trawl, Beam Trawl, Danish Seine, Pot, Diving, Yabby Pump/Fork, Hand Collection
- All data representing < 5 boats have been removed due to confidentiality.

The wild-caught fish harvested in marine water offshore the SEQ coastline was derived be summing up the total retained volume, which was reported in kilograms, this volume was then converted into tonnes for compatibility with other food commodities produced in SEQ.

Queensland Government (2025a) provides additional and more recent information on the gross value of production through its DataFarm dashboard. However, this dashboard does not include production volume data that correspond with the gross value figures. To avoid potential misconceptions, this dataset was not used in this report, but readers may wish to consult it for up-to-date gross value of production information.

### Food manufacturing, distribution and retail in SEQ

The Transport Network Strategic Investment Tool (TraNSIT) is a computer-based modelling tool (Higgins et al 2025; Higgins et al., 2018; Australian Government and CSIRO 2025) developed by CSIRO to provide an evidence-base to inform infrastructure investments and policy decisions for transport and supply chains. TraNSIT was initially parameterised for about 98% of agriculture for the Agriculture Competitiveness White Paper, and for forestry transport in Australia, before being extended more broadly to include fuels, minerals, chemicals, general freight, and the health and construction sectors. Data underpinning the tool includes:

- 31 million annual road vehicle trips using 849,235 road-based supply chain paths (i.e. unique movements).
- 15.8 million annual rail wagon movements using 6,490 supply chain paths.
- 1.6 billion tonnes transported by ship along 19,200 different supply chain paths domestically and to/from other countries.

The tool has been used extensively to test the benefits of road and rail upgrades, transport-related regulatory changes, resilience of the road network and new intermodal and processing facilities. Originally designed for infrastructure investments, it has been extended to understand impacts from network disruptions in the form of road and rail closures from weather events.

The road network used in TraNSIT is underpinned by HERE Data (www.here.com) while the rail network is based on multiple sources. Data from local and state-based transport/road agencies such as road access restrictions and road/rail investment are used to update network attributes. Road access limits, performance based standards (PBS), are captured from the National Heavy Vehicle Regulator (NHVR) dataset and integrated into the modelling process by conflating with the road network. The PBS scheme, administered by the NHVR, provides a nationally consistent set of rules and guidelines under which heavy vehicles are assessed to ensure they can operate productively, safely and sustainably on road networks appropriate for their level of performance. The PBS classification determines the vehicle configurations that can use each segment in the road network.

A subset of the national network for SEQ illustrating the PBS classifications is shown in *Figure 23*. Road train access from the west through to about Gatton, with the major freight corridors (e.g., Bruce Highway, Pacific Motorway) limited to B-Double vehicles. Access to most retailers is limited to semi-trailers (blue roads).

TraNSIT also has the capacity to estimate the costs of distribution which was not included here. The cost modelling uses a ground–up costing model for road, rail and shipping. Estimates of the cost of operating the heavy vehicle or train from origin to destination also include backloading. For road, estimates are based on published equations for vehicle operating costs. The costs include track access charges (rail) as well as registration and fuel excise costs (road) that cover income for rail and road network managers. They do not account for costs of road or rail construction. Costs of transport can be translated to dollars per payload tonne or total costs for individual supply chains. Transport costs are based on these cost models and do not represent freight rates (prices) charged for the transport service. Freight rates often differ from modelled

costs depending on backloading, competition on different routes and market structures. However, the operating cost models have been validated over the past six years with freight operators across Australia, who provided valuable knowledge to calibrate many of the input cost parameters.

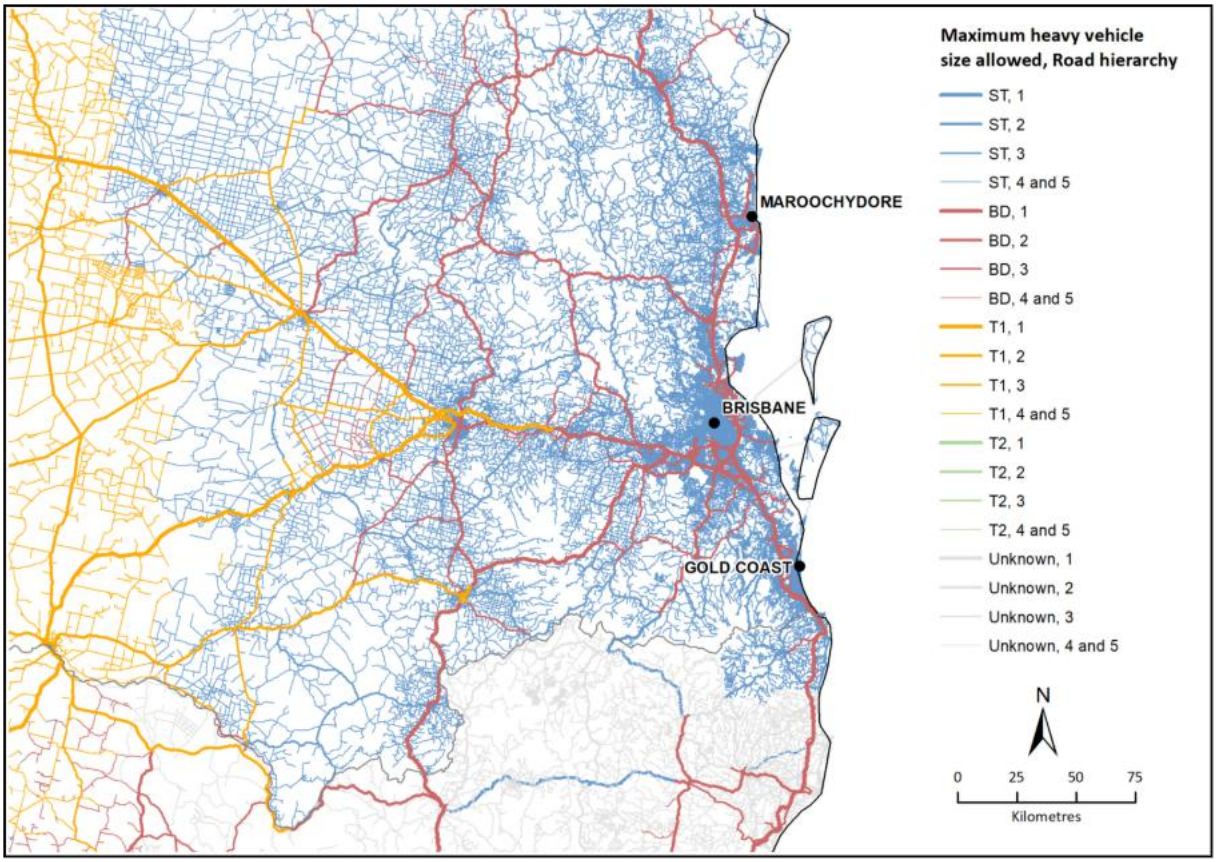


***Figure 23*** **Map of road network in South East Queensland showing the vehicle access routes. Notes: ST - Semi Trailer, BD - B-Double, T1 - PBS3a, T2 - PBS4a. Source Australian Government and CSIRO (2025).**

Common cost parameters for road and rail are driver costs, capital depreciation, maintenance, fuel and fixed costs (e.g. administration, registration). The operating cost model is used to calculate the cost of the vehicle trip from origin to destination, accommodating changes in road conditions (surface, speed, gradient, etc.) for every segment. The total cost of the trip can be disaggregated into dollars per tonne, kilometre or hour.

Data for TraNSIT has been collected and synthesised from over 400 different sources including industry, government agencies and public repositories, since 2012. Data are sourced at the highest integrity available for use in the TraNSIT model, with updates generally every 2-3 years. A baseline generated in September 2025 was used for this report, based on data of varying freshness.

Current high-quality data are essential for achieving accuracy in modelling outputs. Types of data collected include enterprise locations and capacities, and where possible, the origin and destination paths for each supply chain. As of September 2025, TraNSIT includes 545,644 enterprises comprising 479,000 production locations, 29,900 retailers, 2,234 processors/manufacturers, 1,663 distribution and storage points, and 1,455 hospitals/clinics. Future advancements for the tool include mapping the annual tonnes of freight moved between each enterprise for each commodity, disaggregated by month of year. This seasonal production and processing data are required for the relevant commodities such as horticulture and grains. This data granularity could also support future integrated food system planning for SEQ, and other regions.

### 6.4.5 Challenges and risks for food production and distribution

Flood risk concordance with food distribution centres was mapped in QGIS using: OpenStreetMap data for a base map; distribution centre data from ALDI, Coles and Woolworths, as well as Google Maps; LGA boundaries from Queensland Government; and flood risk data from Councils (Brisbane City Council, City of Gold Coast, Ipswich City Council, Logan City Council, City of Moreton Bay, and Redland City Council). Sources are included in the References.

### 6.4.6 Employment in food-related sectors

The most recent, frequent and detailed available data on employment in the agri-food sector in SEQ are from the Survey of Education and Work, conducted annually by the ABS. While these data are available at the LGA level, the data is rounded to the nearest hundred for confidentiality. Consequently, this data is more useful at the SEQ level rather than for each LGA. An alternative dataset, the Linked Employer-Employee Dataset counts all jobs held in the reporting period, so in high-turnover industries like food service, job counts appear much higher and as such this was not used for this assessment of employment in the agri-food sector. Census data from 2021 (ABS, 2023b) is detailed, but due to be updated in 2026. The 2021 Census data was used where more recent data were not available. Where not listed in data reporting above (i.e., grouped as employment in the sector), the 31 industry groups listed in *Table 23* were used. These categories are from the Australian and New Zealand Standard Industrial Classification (ANZSIC) 2006, which offers a hierarchy of division, subdivision, group and class to describe industry sectors.

***Table 23*** **Industry codes used to identify employment in agri-food related roles.**

| ANZSIC 2006 Group Code | Industry sector | ANZSIC 2006 Group Code | Industry sector |
|---|---|---|---|
| 010 | Agriculture nfd | 113 | Dairy Product Manufacturing |
| 012 | Mushroom and Vegetable Growing | 114 | Fruit and Vegetable Processing |
| 013 | Fruit and Tree Nut Growing | 115 | Oil and Fat Manufacturing |
| 014 | Sheep, Beef Cattle and Grain Farming | 116 | Grain Mill and Cereal Product Manufacturing |
| 015 | Other Crop Growing | 117 | Bakery Product Manufacturing |
| 016 | Dairy Cattle Farming | 118 | Sugar and Confectionery Manufacturing |
| 017 | Poultry Farming | 119 | Other Food Product Manufacturing |
| 018 | Deer Farming | 121 | Beverage Manufacturing |
| 019 | Other Livestock Farming | 360 | Grocery, Liquor and Tobacco Product Wholesaling |
| 020 | Aquaculture | 410 | Food Retailing nfd |
| 041 | Fishing | 411 | Supermarket and Grocery Stores |
| 052 | Agriculture and Fishing Support Services | 412 | Specialised Food Retailing |
| 110 | Food Product Manufacturing nfd | 450 | Food and Beverage Services nfd |
| 111 | Meat and Meat Product Manufacturing | 451 | Cafes, Restaurants and Takeaway Food Services |
| 112 | Seafood Processing | 452 | Pubs, Taverns and Bars |
| | | 453 | Clubs (Hospitality) |

Note: Nfd is not further defined.

## 6.5 Robust evidence to inform food system strategy

There is increasing scrutiny of the widespread reliance on data-driven evidence to guide planning, investment decisions, and on-ground action. This scrutiny reflects a growing recognition that, while data can be repurposed in valuable ways, doing so responsibly requires a clear understanding of its provenance—where it originated, why it was collected, and the assumptions that shaped it. These factors influence not only what the data can reveal, but also what it inevitably overlooks. Data is also dynamic: information captured at a particular moment rarely retains the same accuracy or relevance over time, and some datasets will soon become outdated. More data does not automatically lead to better insights, nor does it necessarily produce the knowledge required to support action.

Evidence gathered through roundtables and forums is similarly partial and uncertain. Not all perspectives of those with a stake in the SEQ food system have been represented, and participants often hold multiple roles that can be difficult to navigate and reconcile (e.g., Robinson et al., 2022). Additional robust evidence—particularly for other key drivers and possible future scenarios—may need to be collected, negotiated, and analysed as this work evolves. Even so, this report provides South East Queenslanders with a strong evidence base from which to define the direction of the region's future food system and develop practical strategies to get there. It is hoped that other food bowl strategies will be developed across Australia to support a more integrated and sustainable national food system.

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