

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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- Indigenous Business Australia
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- Just Meat Protein
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- Lockyer Valley Foods
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- Queensland Fruit and Vegetable Growers (QFVG)
- Resilient Rivers SEQ
- Slow Food Noosa
- Sunshine Coast University
- The Nature Conservancy
- The University of Queensland
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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.

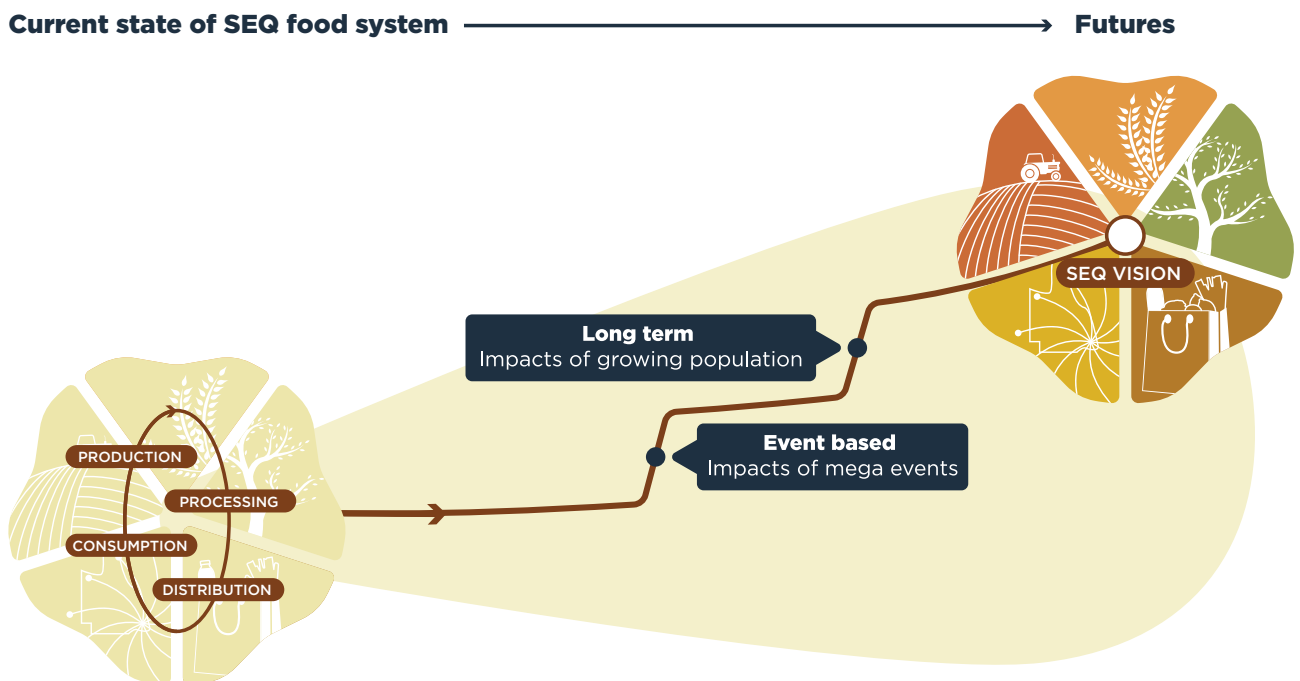


Figure 1 SEQ food system elements and drivers of change centred in this Strategy

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*.

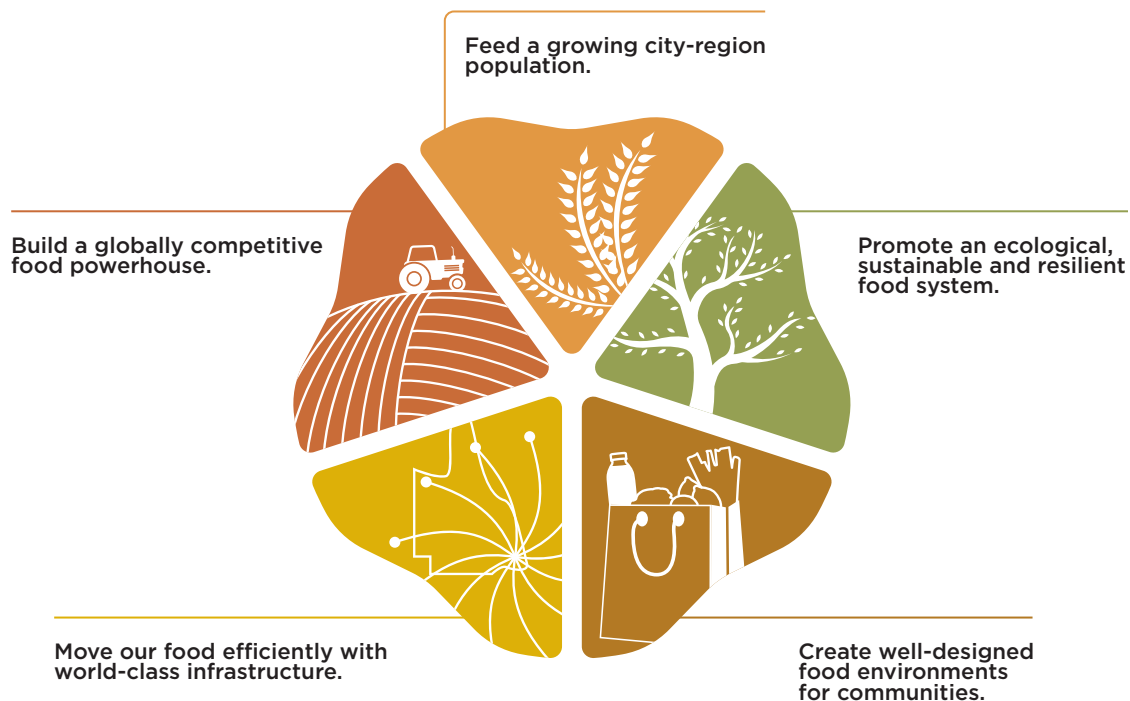


Figure 2 Five key food system goals for a future sustainable food system in SEQ

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.

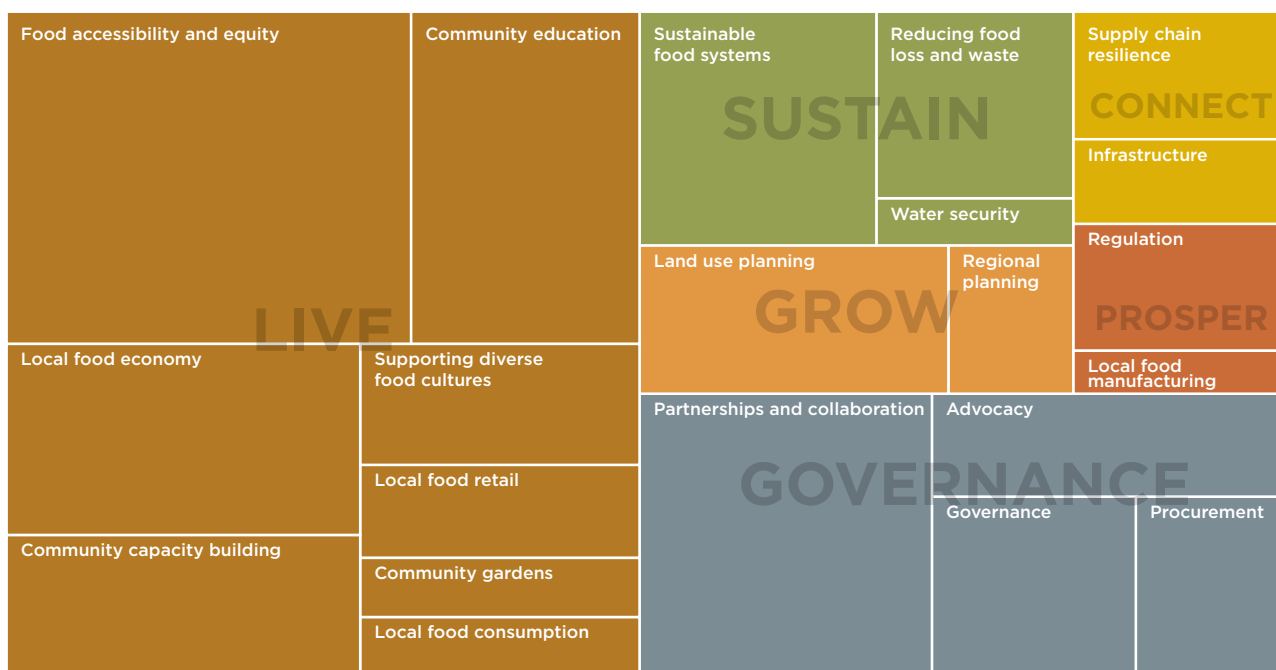


Figure 3 Diverse food values and priorities in food system plans across Australia, aligned with the five themes from 2023 SEQ Regional Plan. Refer to 6.4 Data sources and analytical methods for a list of plans analysed.

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.

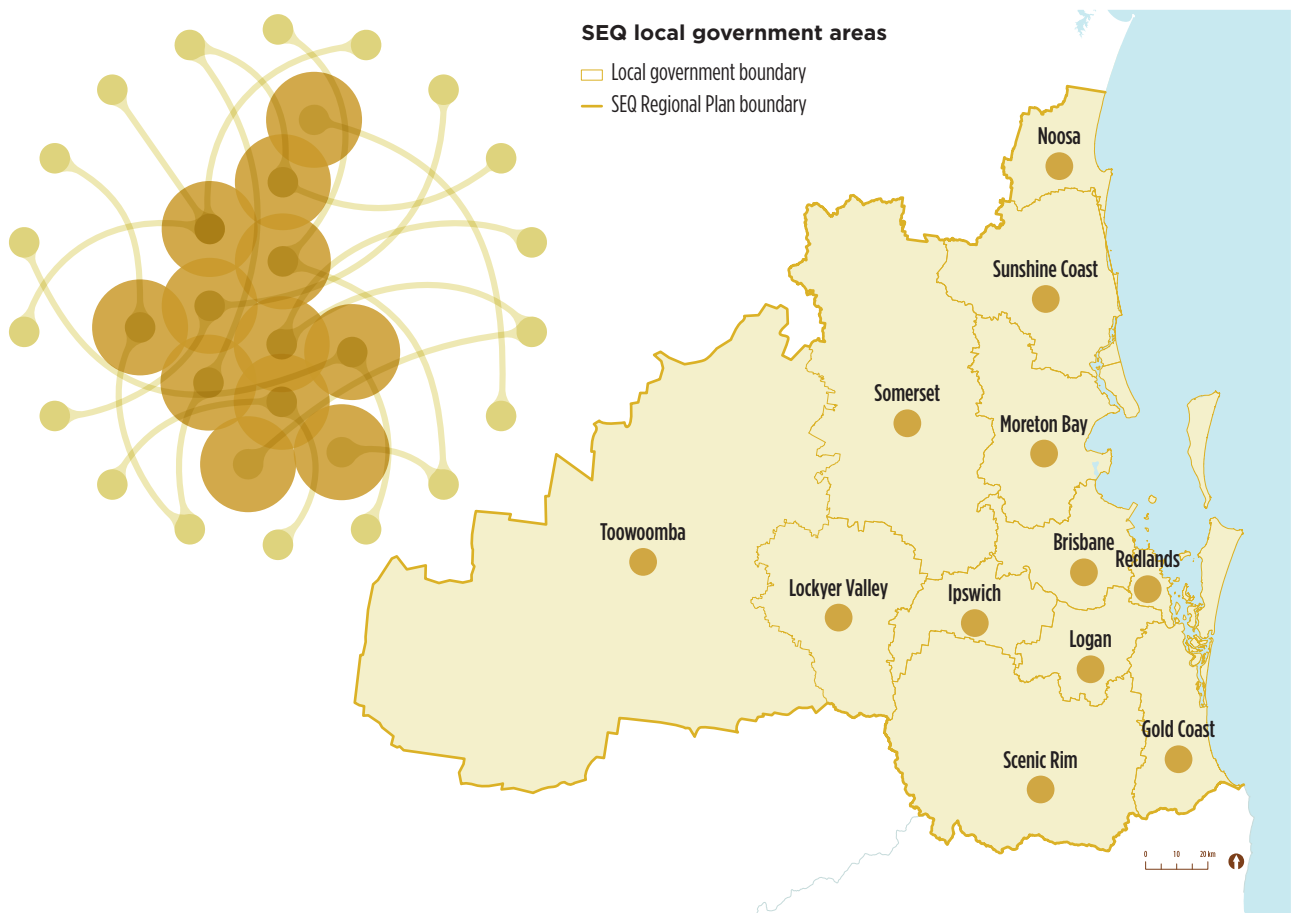


Figure 5 The Strategy recognises there are multiple interconnected local, regional, and broader food systems nested within and beyond the SEQ region

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.

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