

Sunshine Coast – The Natural Advantage:
Regional Economic Development Strategy 2013 – 2033

AGRIBUSINESS
INDUSTRY AND INVESTMENT
ACTION PLAN 2014-2018



Industry and investment planning context

The Agribusiness industry will play a pivotal role in shaping the Sunshine Coast economy into the future.

The Sunshine Coast Regional Economic Development Strategy 2013-2033 provides a vision and blueprint for the new economy – a prosperous, high-value economy of choice for business, investment and employment, while offering an enviable lifestyle and environment.

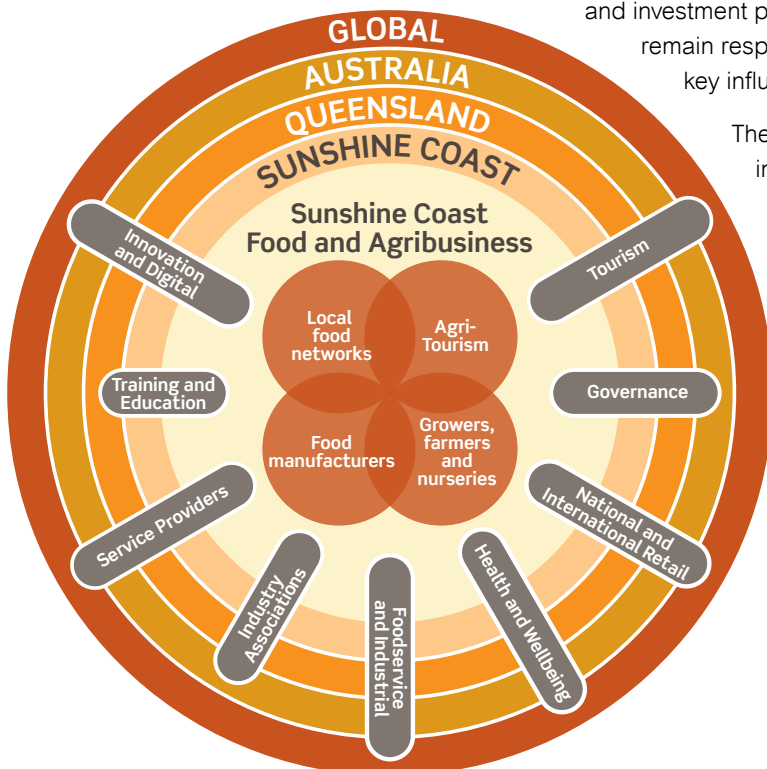
The new economy for the Sunshine Coast will be built on:

- ▶ strong regional leadership and collaboration
- ▶ major capital investment in game changing projects that will re-shape the foundations of the economy
- ▶ growth and investment in seven high-value industries linked to the game changing projects, which will shape the population that is attracted to live and work in the region
- ▶ responsiveness of business and industry to demand from national and global markets
- ▶ investment in talent and skills so the region provides the workforce to respond to the demand of the high-value industries.

The Sunshine Coast Regional Economic Development Strategy 2013-2033 is accompanied by an initial five-year implementation plan to 2018 to commence the transition to the new economy.

The industry and investment plans produced for each of the high-value industries correspond to the five-year implementation plan and will evolve over time as key actions are initiated, reviewed and completed. Industry and investment plans will be reviewed and updated annually to ensure they remain responsive to the factors shaping the regional economy and the key influencers on those industries.

The Agribusiness industry is one of the seven high value industries that will play a pivotal role in building and shaping the new Sunshine Coast economy. The Agribusiness industry scope represents the growth and export potential of the industry and comprises primary processors, food manufacturers, growers, farmers and nurseries, agri-tourism and local food networks. See diagram on left.



Did you know?

It is estimated that there are more than 900 agricultural businesses in the Sunshine Coast region.

Industry mission 2014-2018

The Agribusiness industry is an important contributor to the regional economy with a value add contribution of approximately \$365 million in 2011-2012¹ however the market value estimate (dollar value) is predicted to be significantly more than this.

It is estimated there were just over 900 agricultural businesses in the Sunshine Coast region in 2010 - 2011 as well as numerous agribusiness processors and sellers on the Sunshine Coast¹. Existing data does not appear to include manufacturing, fisheries or nursery and the industry needs to be better qualified and quantified to better understand its significance and opportunities.

This Action Plan has been developed with a Taskforce consisting of key industry stakeholders. A literature review was undertaken of 29 research papers (which have been outlined under References) and used by the Agribusiness' Taskforce as a foundation of knowledge to support and underpin the development of this Action Plan.

This Action Plan outlines simplified key priority actions that will contribute to economic development, helping to deliver on the vision of the *Sunshine Coast Regional Economic Development Strategy 2013 - 2033*. The Plan will be reviewed and updated each year to reflect new priorities and changes within the industry.

This Plan lays the foundations between now and 2018 for the industry to achieve this objective, which it will continue to pursue over the life of the *Sunshine Coast Regional Economic Development Strategy 2013 - 2033*.

The Action Plan aims to assist the industry in achieving the following goal:

The goal is to create employment and grow businesses that contribute to a sustainable Sunshine Coast economy by sharing knowledge, increasing representation and strengthening relationships across our Food and Agribusiness industry.

¹ Source: Agribusiness Industry Profile Sunshine Coast Council, AEC Group Final Report February 2014

Did you know?

Agribusiness generated approximately \$365 million to the Sunshine Coast economy in 2011-2012.

Aspirational targets for the Agribusiness industry

Goals for the Agribusiness industry	Position in 2014	Plan for 2018
Gross Value-Add	\$356.7 million	\$394.8 million
Employment	4,956 employees	5,100 employees
Exports	\$293.7 million	\$312.2 million
Change in Exports	-	+6.27%
Average Annual Income	\$38,939	\$43,393
Change in Registered Businesses	-	+2.45%

Source: AEC Group



Shaping and influencing the industry in the new economy

The Sunshine Coast has existing food and agribusiness strengths and is characterised by a diverse range of industries including: horticulture, dairy/speciality dairy production, seafood, nurseries and value add producers. The region has a unique and enviable combination of geographical and climatic factors.

Leading Australian food manufacturers and exporters Gourmet Garden, Nutworks and Buderim Ginger are located in the region, which provides the opportunity to showcase the Sunshine Coast as an investment location of choice for similar high calibre companies.

In 2012, the State Government identified agriculture as one of its four economic pillars and released *Queensland's Agriculture Strategy: A 2040 vision to double agricultural production*. The strategy's vision acknowledges that successful agribusinesses across the supply chain will continue to underpin the industry, but that vertical integration and increased capital investment will be important for future growth.

There are a number of factors that will shape the direction and growth of the Industry over the life of this Action Plan:

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- ▶ As an integral part of Queensland food production, the Sunshine Coast is well placed to contribute to this growth through its location, existing research facilities and the wide range of foods that it produces and manufactures. The Queensland Government has a target of **doubling food production in Queensland by 2040** and agriculture is one of four pillars to develop the economy.
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- ▶ **Innovation and operational efficiencies are important drivers for further investment and innovation.** The Agribusiness industry continues to grow at an average of 4.1% per annum since 2006-2007, generating approximately \$365 million to the Sunshine Coast economy in 2011-2012, with employment in this sector at 3.3% in 2011. This industry is recognised both nationally and internationally for its innovation and operational efficiencies.
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- ▶ **Strong leadership and collaboration** through the establishment of an Industry Group whose primary functions will be to support existing players and to seek and promote employment, new growth and investment opportunities. There is currently no such industry group for Agribusiness on the Sunshine Coast, which is a disadvantage relative to other industries.
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- ▶ **Investment and support will be required** to identify issues and exploit opportunities throughout the supply chains, which can then be used for development of existing businesses and encourage further investment.
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- ▶ **Agribusiness is undergoing a transition** - the Agribusiness industry is becoming increasingly entrepreneurial and focused on value adding with linkages to manufacturing, education, retail and tourism.
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- ▶ **The Sunshine Coast is undergoing urbanisation and population growth** and experiencing high agricultural land values. Subsequent challenges include access to affordable land and conflicts between agribusiness and non-agribusiness residents.
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- ▶ **The majority of Sunshine Coast businesses can be classified as micro to small scale enterprises** with many of the smaller producers choosing to sell direct to local markets. The trend to shortening the supply chain and shift to local direct markets has been associated with small scale farming globally.
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- ▶ **There are no traditional large scale wholesale markets** on the Sunshine Coast (with the exception of nursery products) so product is sent to Brisbane for purchase by local consumers. Further, there are no organised co-operatives or ways of consistently purchasing local produce.
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Emerging Opportunities

The Sunshine Coast and neighbouring municipalities of Noosa, Gympie and Moreton Bay have a potential catchment of approximately 800,000 consumers, with strong overall population growth predicted for the region. This represents a large and growing local market for agribusiness. Further, there are significant South East Queensland and national growth trends plus growing global population, affluence and changing dietary patterns, which all represent major opportunities.

There is the opportunity to build on the Sunshine Coast's diversity of primary and value added products with the following opportunities emerging:

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- ▶ **Form a leadership group** - to improve communication and collaboration and enable businesses to respond to a dynamic changing environment and market opportunities as they arise. The group to advocate and be a representative peak industry body for agribusiness.
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- ▶ **Tap into increased demand for food resources – both locally and globally.** There is increasing growth in demand by Australian consumers for local food, together with growth of a 'foodie' segment within the Australian market. Internationally, research indicates there will be a great demand from China for fresh and processed food and agricultural products, with this market willing to pay a premium for quality, freshness and novelty. Trade has also been recently liberalised by the China-Australia Free Trade Agreement.
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- ▶ **Build on the region's 'Natural Advantage' reputation for both a clean environment and some of the world's highest food safety/security standards,** and establish 'Natural Advantage' groupings, such as: Sunshine Coast Fresh (fresh produce); Sunshine Coast Organic (an organic hub); Sunshine Coast Food (added value, dairy and milk) and Sunshine Coast Plants (horticulture and nurseries).
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- ▶ **Add value to raw products** – and provide a higher value return to producers and the range of products emanating from the region, which include: herbs, nuts, dairy products (such as cheese and yogurt) confectionary, bush foods, dried and baked goods, coffee, tea, wine and fruit juices, olive oil and avocado oil and a range of sauces, jams and chutneys.
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- ▶ **Improve collaboration and communication** – to shorten the supply chain and establish cross industry, cross regional collaboration and partnerships. Recent industry forums have stressed the need for the Agribusiness industry to work collectively to identify how the economy can change, deliver critical new investment and opportunities to up-skill the workforce to achieve higher levels of employment, higher income levels and greater resilience to market fluctuations - while at the same time preserving what is best about the region.
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- ▶ **Exploit the region's major infrastructure projects** - the Sunshine Coast Public University Hospital complex will be a major driver for industry growth in the region and provide opportunities for local market networks. The Hospital has a forecasted need for up to 1.5 million meals per year. Facilities management company, Spotless, which has 14 Public Private Partnerships contracts across Australia and expects significant opportunities for local business to supply products and services to the Hospital including produce and food products. The expansion of the Sunshine Coast Airport will further provide opportunities for the industry to grow with increased catering demands as well as the improved infrastructure allowing for greater and direct access and links into international markets including Asia.
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- ▶ **Exploit aquaculture and other seafood opportunities** – the Sunshine Coast is already known for its Mooloolaba prawns, Moreton Bay bugs and fisheries, with the opportunity to build on this reputation. Further, with growing global population and no increase in wild caught, aquaculture is the only avenue to meet demand.
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- ▶ **Diversified farming** - allowing farmers to introduce a new business activity to generate another source of farm-based income. The new or additional farming enterprise may be agricultural, such as a new crop or animal, or non-agricultural, such as agritourism or on-farm processing of food.
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Did you know?

Gourmet Garden exports herbs and spices to the rest of the world from the Sunshine Coast.



Agribusiness Industry and Investment Action Plan

The actions outlined in this plan have been determined collaboratively by key representatives of the Agribusiness industry on the Sunshine Coast. The plan contains the activities which industry representatives believe will position the industry to achieve the mission and performance indicators.

Mission

The goal is to create employment and grow businesses that contribute to a sustainable Sunshine Coast economy by sharing knowledge, increasing representation and strengthening relationships across our Food and Agribusiness industry.

Targets

- ▶ \$395 million industry
- ▶ 5,100 employees
- ▶ \$312 million of goods and services produced for export
- ▶ \$43,393 average annual wage for the industry
- ▶ 1,843 registered businesses

The actions nominated take into account the factors influencing industry growth and investment and the opportunities that are emerging for the Agribusiness industry in the region. All actions support the **five pathways** identified in the *Sunshine Coast Regional Economic Development Strategy 2013-2033*, specifically:

- 1 Leadership, collaboration and identity
- 2 Capital investment
- 3 High-value industries
- 4 Local-to-global connections
- 5 Investment in talents and skills.

Key partners with Sunshine Coast Council (SCC) in implementing the Action Plan include: Austrade/TradeStart, Aviation Sunshine Coast (ASC), Chamber(s) of Commerce (CoC), Cleantech Industry Sunshine Coast (CISC), Commercial Real Estate Agents (CREA), Department of Education and Training (DETE), Gympie Regional Council (GRC), Innovation Centre Sunshine Coast (ICSC), Queensland Government (QG), Noosa Shire Council (NSC), Regional Development Australia Sunshine Coast (RDASC), Regional Development Australia Moreton Bay (RDAMB), Regional Development Australia Sunshine Coast (RDASC), Sunshine Coast Airport (SCA), Sunshine Coast Food and Agribusiness Industry Group (SCFAIG), Sunshine Coast Destination Limited (SCDL), TAFE Queensland East Coast (TQEC), Tourism and Events Queensland (TEQ) and the University of the Sunshine Coast (USC).



The Queensland Government has a target of doubling food production in Queensland by 2040 and agriculture is one of four pillars to develop the economy.

1. Leadership, collaboration and identity

Key performance indicators						
<ul style="list-style-type: none"> • Employment growth in the Agribusiness industry on the Sunshine Coast relative to 2013 data • Increase (per cent of GRP) in contribution of Agribusiness industry to the Sunshine Coast economy (relative to 2013 data) • Increased industry linkages (direct economic impact) of local companies' involvement in agribusiness initiatives, business opportunities and business development. 						
Actions	2014-15	2015-16	2016-17	2017-18	Lead	Partners
<p>a) Establish the representative Sunshine Coast Food and Agribusiness Industry Group:</p> <ul style="list-style-type: none"> • Establish an appropriate entity, develop operating protocols and terms of reference for the group • Source funding for a paid employee/employees to coordinate to ensure longevity of organisation. 					SCFAIG	All partners
<p>b) Build links between growers and sellers by identifying supply and demand chains and communicate and promote to industry:</p> <ul style="list-style-type: none"> • Undertake an audit of regional (public and private) assets including identifying key infrastructure, processes, facilities, outlets and technical support available • Include endorsed suppliers from local businesses • Identify niches and 'Natural Advantage' groupings, such as: Sunshine Coast Fresh (fresh produce); Sunshine Coast Organic (an organic hub); Sunshine Coast Food (added value, dairy, milk etc) and Sunshine Coast Plants (horticulture, nurseries etc). 					SCFAIG	All partners
<p>c) Create an Agribusiness Industry Capability Directory, detailing specialist capabilities, products, quality accreditation and equipment, with the potential to be leveraged or commercialised to provide greater benefit within the industry:</p> <ul style="list-style-type: none"> • Promote awareness and identity of Sunshine Coast producers and exporters both regionally, nationally and internationally, through traditional and modern techniques such as social media • Promote the purchase of local food products, such as 'Buy Local' programs, including investigating new and existing portals (such as Sunshine Coast Business Gateway) and creating high quality and reliable standards to authentic product from the region • Identify and realise existing and potential areas of regional competitive advantage • Link with other information portals. 					SCFAIG	All partners

1. Leadership, collaboration and identity continued

Actions	2014-15	2015-16	2016-17	2017-18	Lead	Partners
<p>d) Identify cross regional collaboration and project opportunities such as:</p> <ul style="list-style-type: none"> • Group purchasing (e.g. public liability insurance for agritourism) • A 'zero waste project' to eliminate fresh produce dumping (e.g. strawberries) • Facilitate linkages with other agribusiness groups from other regions (e.g. Moreton Bay, Noosa and Gympie). 					SCC	All partners
<p>e) Identify existing best practice models of regional Agribusiness industry groups and promote successful case studies:</p> <ul style="list-style-type: none"> • assess advantages of Geographical Identification. 					SCC	QG
<p>f) Build the profile of the Sunshine Coast Food and Agribusiness Industry Group to provide cohesive and effective leadership to create employment and grow businesses:</p> <ul style="list-style-type: none"> • Undertake activities to sustain the group, including identifying a value proposition and creating membership • Develop and implement a communications strategy to promote the region, industry and farmers • Develop partnerships with key industry stakeholders • Change the idea of food from being a commodity to having value • Support local food festivals and events. 					SCFAIG	All partners



2. Capital investment

Key performance indicators						
<ul style="list-style-type: none"> Businesses attracted/retained to the region (number) and the number of jobs attracted/retained Total number and value of new projects Availability of shovel ready sites and value of redevelopment projects Number of building approvals granted. 						
Actions	2014-15	2015-16	2016-17	2017-18	Lead	Partners
a) Take advantage of the game changer opportunities , such as the Sunshine Coast Public University Hospital and expanded airport to promote and leverage opportunities for capital investment, such as: <ul style="list-style-type: none"> a chilled storage facility and distribution hub at, or at close proximity to, the Sunshine Coast Airport market networks to consolidate wholesale products. 					SCC, SCA	ASC
b) Identify the value proposition for the Agribusiness industry in the region and develop a targeted marketing and communication plan to promote the region's leading industry investment opportunities by key stakeholders such as Trade and Investment Queensland.					SCC	SCFAIG, QG
c) Identify agribusinesses within the region that can benefit from scale and capital investment to grow and expand.					SCC	SCFAIG, QG, NSC
d) Develop a database to identify land and business opportunities for Investment and promote to investors: <ul style="list-style-type: none"> Develop a pipeline of investment ready opportunities, including running investment readiness workshops Run targeted seminars to highlight investment opportunities and funding / investment sources within the industry Identify and create a local information base and Resource Kit to promote investment opportunities. 					SCC	QG, TQEC, ICSC

3. High-value industries

Key performance indicators						
<ul style="list-style-type: none"> • Sustainability and growth of locally grown companies • Change in entrepreneurial potential and increase in intellectual property protection • Number of business expansions and businesses assisted • Increased in return for primary producers 						
Actions	2014-15	2015-16	2016-17	2017-18	Lead	Partners
<p>a) Implement strategies to minimise waste/dumping and increase potential for new income streams from excess production:</p> <ul style="list-style-type: none"> • Create an outlet for 'Imperfect Picks'/ imperfect fruit • Investigate opportunities for education programs • Identify methods to utilise excess production • Identify opportunities for value added products from waste – target 'zero waste'. 					SCC	QG, CISC, NSC, RDAMB
<p>b) Ensure land use regulations meet industry needs and address urban encroachment with regional planning schemes that support growers and farmers:</p> <ul style="list-style-type: none"> • Identify and remove legislative, legal and planning barriers to drive efficiencies • Research and implement Best Practice to deal with issues • Identify and remove 'green tape' and 'red tape'. 					SCC	SCFAIG, QG
<p>c) Investigate water management, bio-security, drought relief, disaster recovery and water security:</p> <ul style="list-style-type: none"> • Research and advocate for reform of existing policy and regulation regarding water infrastructure and resilience where appropriate • Advocate changes if necessary. 					SCC	SCFAIG, QG
<p>d) Facilitate linkages between Sunshine Coast agribusinesses with innovation opportunities and regional research facilities:</p> <ul style="list-style-type: none"> • Further exploit commercialisation and technology diffusion opportunities • Assess current research and development being undertaken within the region and identify regional research and development requirements • Promote the utilisation of existing mentoring, workshops, programs and events (such Innovation Masterclass, Ideas to Market, Start-Up Weekends, IC Pitch Competition) • Tap into existing talent pool and local entrepreneurs to help grow the capacity of the Agribusiness industry • Identify and promote available funding sources, grants and inspiring case studies. 					USC	SCFAIG, QG, NSC, TQEC, ICSC
<p>e) Identify opportunities for industry to engage with existing private and public infrastructure and regional assets, such as:</p> <ul style="list-style-type: none"> • Maroochy Horticultural Research Station • Innovation Centre Sunshine Coast • Innovation Centre – Coopers Plains. 					SCC	ICSC, QG, NSC, TQEC

4. Local-to-global connections

Key performance indicators						
<ul style="list-style-type: none"> Improvement in region's 'competitive position' in the national and global economy New investments attracted/facilitated (overall, new projects) Increase in exports of agribusiness products and services from the Sunshine Coast The number of agribusinesses involved in the Sunshine Coast Export Network and relevant trade missions. 						
Actions	2014-15	2015-16	2016-17	2017-18	Lead	Partners
a) Promote global market trends , particularly in Asian markets (Hong Kong, Singapore, China, Japan and South Korea) and identify opportunities for Sunshine Coast primary production and value added products: <ul style="list-style-type: none"> Identify partnership opportunities with other Australian producers, industry bodies and channels. 					SCC	Austrade/ TradeStart, QG, NSC
b) Identify and leverage export opportunities (both exports from the region to Australia and global opportunities) utilising contacts, networks, events, missions and market information, from Sunshine Coast Council, Trade & Investment QLD (QG) and Austrade/TradeStart: <ul style="list-style-type: none"> Link opportunities for industry groups and key exporting agribusinesses government on international and national trade missions to major international trade shows such as Food and Hotel Asia, HOFEX (Hong Kong), Asia Fruit Logistica (with Australia Fresh) Promote existing Export Programs and Services, such as Sunshine Coast Council's Export Capability Program, EFIC and EMDG. 					SCC	Austrade/ TradeStart, QG, NSC
c) Organise a briefing for the Sunshine Coast Export Network (Agribusiness) on the features and benefits locally of the China-Australia Free Trade Agreement.					SCC	Austrade/ TradeStart, QG
d) Support the growth of companies involved in emerging industries, such as aquaculture, functional foods and alternative horticultural crops.					SCC	All partners
e) Position the industry to be able to capitalise on the Sunshine Coast Airport as the gateway for international freight of agribusiness products by 2020.					SCC	SCA, SCFAIG

5. Investment in talent and skills

Key performance indicators						
<ul style="list-style-type: none"> Labour force participation and skill retention in the region Assessment of business workforce needs Percentage growth in agribusiness education programs Collaboration and partnerships between secondary schools, VET and tertiary providers on agribusiness programs Increased number of food tourism experiences Increase in average salary in the Agribusiness industry. 						
Actions	2014-15	2015-16	2016-17	2017-18	Lead	Partners
a) Identify existing relevant agribusiness programs in place on the Sunshine Coast in public and private schools and tertiary institutions: <ul style="list-style-type: none"> Identify ways to connect programs to Sunshine Coast farms and food businesses. 					DETE	SCC, SCFAIG, USC
b) Be the contact point with industry and employers for school-based training programs that improve opportunities for successful transitions from school to work, such as the GenR8 Program.					DETE	SCC, SCFAIG
c) Provide information and support for employers to build on their current workforce strengths and capabilities, plan development opportunities and access training through the Queensland Government's Great Skills. Real Opportunities Action Plan.					DETE	SCC, SCFAIG, NSC
d) Link with REDS high value industry and investment plans (particularly with Education and Research and Digital Sunshine Coast Plan) to ensure Agribusiness is represented: <ul style="list-style-type: none"> Facilitate industry driven training linkages with education providers. 					SCC	DETE, TQEC
e) Build a reputable food tourism destination with increased availability of food tourism experiences through: <ul style="list-style-type: none"> Development of a Sunshine Coast food trail website for consumer interaction Delivery of capacity building workshops and forum Coordination of a valuable networking event to connect food producers with 'buyers'. 					SCDL	DETE, NSC, GRC, QG, SCC
f) Investigate and address labour force issues associated with crop harvesting: <ul style="list-style-type: none"> Understand best practice on promoting the area to working backpackers Advocate policy change for on-farm accommodation. 					SCC	QG, TQEC
g) Promote and provide opportunities for understanding practice and performance improvement through lean manufacturing and world-class best practice approaches.					QG	DETE, ICSC

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For information on the Sunshine Coast – The Natural Advantage: *Regional Economic Development Strategy 2013-2033*, visit: www.business.sunshinecoast.qld.gov.au

For enquiries regarding the Agribusiness industry and investment action plan email Council at economicdevelopment@sunshinecoast.qld.gov.au or write to the Sunshine Coast Council, Locked Bag 72, Sunshine Coast Mail Centre, Queensland 4560.