

AUSTRALIA'S SUNSHINE COAST

FOOD AND AGRIBUSINESS Industry Intelligence Report

2020





The value of food and agribusiness on the Sunshine Coast has been steadily increasing and is now valued at \$700 million.³

Bibliography

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- 4 Sunshine Coast Seafood; Creating Sustainable Value Chains. By Dr Kathleen Hastings and Professor Meredith Lawley, November 2016. University of the Sunshine Coast; Sunshine Coast Council.
- 5 Sunshine Coast Food and Agribusiness – Building the Links, Research Report: August 2015. Dr Kathleen Hastings and Professor Meredith Lawley, University of the Sunshine Coast.

Cover image: Based on the Sunshine Coast, Frozen Sunshine is a family business built from the ground up becoming the first artisanal iceblock business based in Queensland. 4 years on from launch, their iceblocks are found in local cafés and independent supermarkets.

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Acknowledgements

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Food and agribusiness is one of the seven high value industries that is playing a pivotal role in building and shaping the Sunshine Coast economy.

The Sunshine Coast is one of the largest and fastest growing regional economies in Australia, with business opportunities emerging in every industry, especially food and agribusiness.

The region is home to more than 900 agribusinesses producing a wide range of products, from seafood and strawberries to plant nurseries, dairy, poultry, cultivated turf and cattle.

The Sunshine Coast is also a foodie's haven, with around 400 food tourism operators and an abundance of annual food festivals drawing visitors from across the world.

According to leading demographer Bernard Salt, the Sunshine Coast is being activated by investments in infrastructure such as the airport expansion project, which will connect the region directly to Asian markets and the rest of the country.

This report provides a look inside the region's food and agribusiness landscape. Sunshine Coast Council is inspiring industry innovators and entrepreneurs to consider the opportunities available in the region and make contact to discuss future growth plans.

Sunshine Coast Council welcomes and supports the growth of local businesses and the establishment of new ones.

- Talk to a specialist for site selection assistance and relocation advice.
- Ask for connections with government and industry bodies and access international market information.
- Find out the options for financial assistance to help offset establishment costs.
- Access a wide array of information online, including local success stories, programs available to local business and the latest in local industry news.

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Industry value



The Sunshine Coast agribusiness industry employs 5,000 people and has made strong productivity growth during the past five years, now injecting around \$700 million into the economy.

High value sectors in the primary production category, valued at \$310 million annually, include:

poultry \$80.67m

wild caught seafood \$56.44m

strawberries \$23.05m

macadamias \$20.29m

dairy milk \$14.81m

pineapples \$11.54m

cultivated turf \$7.75m

The Sunshine Coast also has a vibrant value-adding segment which contributes some \$390 million to the agribusiness industry.

This includes a strong focus on food and agri-tourism, including a strong presence of craft breweries, coffee roasters and artisan producers.

Source: Profile of Sunshine Coast Food and Agribusiness, February 2018 update. Dr Shannon Birch-Chapman, Dr Kathleen Hastings, Professor Meredith Lawley; University of the Sunshine Coast.

The Sunshine Coast's Healthy, Smart, Creative reputation has been strengthened by a clean environment and some of the world's highest food safety and security standards.

It's an exciting time for Sunshine Coast food and agribusiness, with plenty of opportunities to create and grow.

STAR PERFORMER



Nutworks

Nutworks is Australia's premier macadamia nut processing company, based in the heart of the Sunshine Coast.

Macadamias are a \$20.29 million industry in the region, with annual growth recorded since 2011.

The Nutworks factory in Yandina has evolved into a tourist destination, with factory tours, café and retail shop.

- 100% Australian owned and operated.
- Exports to China, Hong Kong, Vietnam and Japan.
- Employs more than 60 people.
- Started producing chocolate and confectionery products in 2002.

Market profile

Sunshine Coast food and agribusiness is distributed domestically and overseas.

33% stays on the Sunshine Coast
50% goes to other parts of Australia
17% is exported

Strong export support

Sunshine Coast Council has created a pathway for companies wanting to export offering a range of programs including face-to-face networking events, connection through the Sunshine Coast Export Network LinkedIn Group, introductory export workshops and coffee catch-ups with export experts.

For more information about exporting email export@sunshinecoast.qld.gov.au

STAR PERFORMER



Nutri-Tech Solutions

Nutri-Tech Solutions is Australia's biggest exporter of sustainable agricultural inputs and organically certified products.

The company works with multi-national food producers, consults to governments internationally and is recognised as a world leader in the sustainable agricultural and horticultural input market.

- Winner Sunshine Coast Business Awards for Sustainability Solutions and Business of The Year 2016.
- Distributes nationally and has 124 products in its range, 63 of which are certified organic and 32 are internationally certified.
- Exports to more than 50 countries.
- Has four brands across agriculture/ horticulture, home gardens, human health and education categories.
- The Nutri-Tech website is quoted as the world's most popular sustainable agriculture site.



STAR PERFORMER

Walker Seafoods Australia

Walker Seafoods Australia is a Sunshine Coast based wild caught seafood company that operates the length of Australia's east coast. The company is known for its high quality, export-grade tuna and swordfish and is the only tuna company in Australia with Marine Stewardship Council (MSC) certification.

Walker Seafoods is the largest company in the Eastern Tuna Billfish Fishery (ETBF), managed by the Australian Fisheries Management Authority (AFMA), the agency responsible for sustainable use of Australia's fisheries.

- 2019 and 2018 Gold Medalists in the Delicious Produce Awards for MSC Certified Swordfish.
- 2018 Finalist in Premier of Queensland's Export Awards.
- 2017 Highly Commended Best Supplier Seafood Excellence Awards – Sydney Fish Markets.
- 2017 Qld state winners in the Delicious Produce Awards for MSC Yellowfin Tuna.
- WSA owns seven vessels, an export and production facility, employs over 50 staff and is vertically integrated.
- Exports to the USA, Japan, Switzerland, Spain and Thailand.
- Supplies Australian chefs including Tetsuya, Neil Perry, Josh Niland and Matt Moran.

Fast facts

1

The Sunshine Coast is an ideal food and agribusiness location with rich soils, a favourable subtropical climate, a clean water supply, high rainfall, predictable temperatures and more than 300 days of sunshine a year.

2

The Sunshine Coast is home to more than 900 agribusinesses and a strong diversity of primary and value-added products. The industry is being strengthened by the emerging opportunities and resilience of the Sunshine Coast processing sector, which is valued at over \$390 million.



3

Mooloolaba is the largest volume wild caught tuna port in Australia, receiving 75% (4,500 tonnes) of Australia's wild caught tuna. It is also the biggest swordfish port in Australia and home to the most sustainable sashimi grade tuna in the world.

4

The food and agribusiness industry has experienced strong productivity growth over the last five years and now generates approximately \$700 million in turnover and provides more than 5,000 jobs.

5

The Sunshine Coast has some of the most affordable business operating costs and lowest payroll tax in Australia.

6

Major infrastructure projects are delivering new opportunities: The new Maroochydore City Centre will include a hotel, convention centre and diverse dining options. The Sunshine Coast Airport expansion will provide greater and direct access to international markets.

7

The Curated Plate is a major food tourism strategy showcasing the industry to the world with a series of innovative food festivals and experiences attracting discerning big spenders.

8

Latest figures show the Sunshine Coast has some of the highest levels of business confidence in Queensland with businesses demonstrating a high degree of certainty in current and future economic growth in the region.

9

The region has evolved into a world-class business and investment option, with more than \$12 billion of private investment and over \$2.5 billion in public sector investment.



10

McCormick and Company - Gourmet Garden Herbs & Spices is Australia's most visible food product in the world, exporting to more than 15 countries and appearing on over 35,000 supermarket shelves.

11

Positioned on the doorstep of Asia and the Pacific Rim, the Sunshine Coast is well connected to national and international markets, with easy access to ports, airports, rail and road freight.

12

A November 2016 industry research report identified increasing demand for high quality seafood due to the region's population growth, increased consumption of seafood and interest in safe, high quality, sustainable seafood.



13

The report also identified growth in the value of seafood exports as an opportunity, as well as the development of value added product from seafood waste. The region's largest seafood export markets are Japan, Hong Kong, New Zealand, the USA and China.

14

Commercial and industrial land opportunities abound within the Sunshine Coast Enterprise Corridor, from Caloundra to Sunshine Coast Airport. This coastal strip is expected to accommodate more than 70% of the predicted population and new business investment needs over the next 20 years.

15

Sunshine Coast Council works with state, federal and local governments and education, community, industry and innovation partners to grow the value of the food and agribusiness industry.



Steam buns, soyfood and cider startups

The Innovation Centre Sunshine Coast and Food and Agribusiness Network (FAN) have partnered to provide 13 of the most innovative food and beverage businesses in the region with the opportunity to take part in GrowCoastal, the region's food innovation accelerator.

Funded by Advance Queensland, the competitive 16-week program accelerates commercialisation and further contributes to creating a collaborative regional ecosystem of food businesses cultivating progressive business growth, exports and high value employment on the Sunshine Coast.

Between 2017-2019, GrowCoastal assisted 37 local businesses and 52

cofounders which include some of Australia's leading food and beverage innovators.

The program has been a catalyst for their success with the three-year aggregated economic metrics for the three cohorts demonstrating:

- **51 new jobs generated (147% growth)**
- **\$2,935,000 in new capital invested**
- **21% revenue growth**
- **121% customer growth**

The foodpreneurs received more than 158 hours of mentoring, training and trade insights plus specialised pitch coaching.



"It helped us identify our target markets, develop suitable packaging, logistics, legal practicalities of labelling and compliance and marketing strategy."

Ann Ross, Hive Haven

In 2019, the program facilitated large audience exposure for participants through events such as FAN Meet the Makers, the Sunshine Coast Curated Plate Food Fair, and Regional Flavours and Fine Foods in Brisbane.

For more information visit www.innovationcentre.com.au/growcoastal



McCormick and Company – Gourmet Garden Herbs & Spices

Gourmet Garden has grown from a small privately-owned company since its inception in 1999 to a global success exporting to more than 15 countries and appearing on over 35,000 supermarket shelves in the United States, Asia, Europe, New Zealand, Canada and the United Kingdom.

Gourmet Garden's herb and spice ranges of Cold Blended Pastes and Lightly Dried are made through proprietary processes and a vertically integrated supply chain that enables the fresh flavour, colour and aroma of Australian grown herbs and spices to be captured and last longer in the fridge.

Herbs used in Gourmet Garden products support Australian growers and manufacturers, with the range being sold to retail, food service and industrial consumers globally.

Gourmet Garden's outstanding success both domestically and internationally has played a key part in its 2016 acquisition by United States based McCormick and Company.

"The Sunshine Coast is the sustainable business location that marries with Gourmet Garden's brand image, culture and aspirations and offers a close link to our agricultural roots. The Sunshine Coast also attracts a high calibre of employees due to fantastic lifestyle benefits, lower regional living costs, tourism attractions, good infrastructure including the regional airport to service our domestic market."

Paris Golden, Managing Director



STAR PERFORMER

Maleny Dairies

Maleny Dairies is a family-owned premium dairy company. Their range of products includes multi award-winning full cream and low fat milks, flavoured milks, cream, custard and probiotic yoghurts.

Care for the land, cows and farmers is at the heart of their business. Maleny Dairies' products are naturally produced, locally sourced, bottled cold and delivered fresh.

Rich, creamy Guernsey milk is the key to a number of their award-winning dairy products and as such they have endeavoured to keep processes as natural as possible. That's why they don't standardise their dairy milk or add anything to it and the reason "it tastes so good."

Maleny Dairies products are now sold across Queensland and northern NSW.

- Australian Grand Dairy Awards 2019 and 2020 – finalist (Farmers Choice Guernsey Milk)
- Australian Grand Dairy Awards - People's choice 2019 (Non Homogenised Full Cream Milk)
- Australian Grand Dairy Awards 2018 – Champion Milk (Farmers Choice Gold Top)
- Australian Grand Dairy Awards 2017 – Champion Milk (Farmers Choice Gold Top)
- Australian Dairy Product Competition 2017 – Gold (Real Cream)



STAR PERFORMER

Kenilworth Dairies

Dairy farmers in the Sunshine Coast region for six generations, the Cochrane family purchased the original Kenilworth cheese factory in 2017.

Building on 60 years of cheesemaking history on the Sunshine Coast, Kenilworth Dairies turns milk from cattle on the family farms into delicious, handcrafted cheese, yoghurt, mousse and ice cream which is distributed nationally to major retailers and independent stores.

Membership in the Food and Agribusiness Network has facilitated the development of strong partnerships with other local producers, supporting mutual business growth. The company prides itself on sourcing local ingredients, including ginger from the famous Buderim Ginger Factory.

Since purchasing the business in 2017 the company has invested heavily in staff, new plant and equipment, new branding, exciting new product ranges and export distribution channels.

- 2019 Royal Sydney Show:
 - Champion Dairy Dessert, Custard & Mousse - Rich chocolate mousse
 - Gold - Rich chocolate mousse
 - Gold - Honey yoghurt
 - Gold - natural yoghurt
- 2019 Dairy Industry Association of Australia:
 - Gold - Ginger Club cheddar
 - Gold - Natural yoghurt
- 2019 Royal Brisbane Show:
 - Gold - Rich chocolate mousse
 - Gold - Natural yoghurt



Industry has strength in numbers

The Food & Agribusiness Network (FAN) is a membership-based, not-for-profit company established to support the food and agribusiness industry in the Sunshine Coast, Gympie, Noosa and Moreton Bay regions.

FAN is a meeting point where food and agribusiness members along with affiliated services are encouraged to share ideas, innovate and collaborate to grow their business.

With strong support from Sunshine Coast Council, FAN has harnessed a groundswell of support with over 300 members, who benefit from industry and market information, collaboration opportunities, networking and training events.

FAN's vision is to actively contribute to doubling the region's food and agribusiness economy by 2030 and to be renowned for food culture and innovation. FAN is now recognised as the fastest growing food industry cluster in Australia.

Find out why a FAN membership is great for business.

www.foodagribusiness.org.au



Members include:

Gourmet Garden
 Maleny Dairies
 COYO®
 The Country Chef Bakery Co.
 Buderim Ginger
 Nutworks
 Epicurean Products
 Walker Seafoods Australia
 Sunshine Tropical
 Tropico
 Maleny Food Co.
 Maleny Cheese
 Your Mates Brewing
 Gluten Free Bakehouse
 Montville Mist Springwater
 Bassett Barks
 Hum Honey
 Birdwood Nursery
 The Happy Snack Company
 Sunshine Coast Brewery
 Vertical Farm Systems
 Woombye Cheese Company
 Hive Haven
 Queensland Cold Logistics
 Black Angus Beef
 Flame Hill Vineyard
 QCamel
 Frozen Sunshine
 Hinterland Feijoas
 Strawberry Fields
 Montville Coffee
 Beefy's
 Kokopod Chocolate



STAR PERFORMER

COYO® global success

COYO® are conscious creators of delicious food for healthy people and a happy planet. Born out of founders Henry and Sandra's Yandina kitchen back in 2010, COYO® was the first coconut milk yoghurt in the world, creating a new global food category in its wake.

COYO® has grown to become the world's most awarded coconut company and much loved global brand, employing 50 Sunshine Coast locals at its purpose-built dairy-free coconut only factory. Products are now available in more than 12,000 stores around the world.

The company recently launched the world's first dairy free and organic coconut milk yoghurt pouch for kids in three flavours and also produces a range of coconut milk ice-creams.

- Australian Organic Awards Export Market Leader 2018, 2019.
- Food and Beverage Industry Award for Best Health Food – COYO for kids, 2018.
- Agribusiness – Large Business Award, Sunshine Coast Business Awards 2018.
- Food Magazine Award for Ingredient Innovation, 2012, 2013, 2014.



SUNSHINE COAST BUSINESS SNAPSHOT

Population growth

- One of the largest local government areas in Australia with a population of 330,000 and has averaged 2.7% annual growth over the last decade, making it one of the fastest growing areas in the nation. (ABS, 2018)
- Population expected to grow to 518,000 people by 2041. (QGSO, 2018; ABS, 2018)
- A wider service catchment of 1.2 million people. (DESE, 2020)

Educated workforce

- Quality education sector with award-winning universities, a multi-campus vocational training institute, more than 100 Registered Training Organisations and more than 80 private and public schools.
- A highly educated workforce, with the region's population holding a higher level of post-secondary school qualifications than the state average and more than 83,500 students studying locally.

Lower operating costs

- More affordable industrial land prices – between 36-84% lower than other Australian capital cities on the eastern seaboard.
- Lower prices for commercial office space – almost 50% lower than Brisbane CBD costs.
- Lowest basic flat payroll tax rate of any Australian state or territory.

Prime location

- The Sunshine Coast Airport is being expanded to deliver direct access to the region from more Australian and international destinations, with completion expected by late 2020.
- The Sunshine Coast is just over one hour by road from Brisbane, the state capital.
- Excellent access to national and international air and sea ports, including Sunshine Coast Airport, Brisbane International Airport and the Port of Brisbane, along with direct access to national road and rail networks.

Export opportunities

- Positioning the region as a competitive source of high demand goods and services to increase investment, employment, infrastructure and community prosperity.
- Sunshine Coast International Business Development program provides collaboration and market opportunities.



FUTURE-PROOFING WITH FAST DATA

The Sunshine Coast International Broadband Network will provide Australia's fastest and most affordable telecommunications connection to Asia from the east coast and the second fastest to the United States.

With future-proof capability, the new cable will increase data transmission speed, reduce risk and lead to a reduction in international communication costs for business and consumers.

The cable will be in service from 2020, making the Sunshine Coast the ideal Australian location for domestic and global operators.

THE FUTURE IS HERE

The Sunshine Coast is building a new economy based on a clear 20-year economic plan, which aims to double Gross Regional Product (GRP) and high-value employment opportunities.

Goals for 2033

- A\$33 billion economy
- 100,000 employment opportunities in high-value industries
- 20% of goods and services produced for export outside the region
- Household income levels above the state average

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