

## Hassad Australia's Response to the Australian Government's Agricultural Competitiveness Issues Paper

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# 1 INTRODUCTION

Hassad Australia (HA) is pleased to submit this response to the Australian Government's Agricultural Competitiveness Issues Paper. Hassad Australia Pty Ltd is an Australian company that was established in November 2009 as Hassad Food Company's first overseas investment. With more than \$425m invested in Australian agriculture, HA has a strong interest in the future competitiveness of primary production in Australia.

HA welcomes the opportunity to participate in the formulation of the White Paper. This submission sets out the particular areas of interest for HA and why we believe they are important more generally to the sector.

A number of the topics listed in the Issues Paper are either not relevant to HA, or best addressed by other industry participants.

HA would welcome the opportunity to discuss any aspect of this response, or any other topic the Australian Government would like to raise with us during the White Paper development process.

## BACKGROUND

Hassad Food Company (HFC) was established in 2008 as a wholly owned subsidiary of Qatar Holdings which is one of the operating arms of the Qatar Investment Authority (QIA), the Sovereign Wealth Fund of Qatar.

While food security was the initiator for HFC's investment in agriculture, the business plan and investment has changed to a totally commercial outcome requirement. By good investment into productive agriculture, our investor sees food security then as a natural outcome, not a driver of that investment.

We believe that corporate players (whether they be foreign or domestic) such as HA have an important role to play in agriculture in Australia in a number of areas that contribute significantly to Australia's sustainability and competitiveness.

HFC chose Australia as its first large scale overseas investment because of the competitiveness of Australian agriculture compared to other major agricultural producers around the world. In our view the continued competitiveness of Australian agriculture is dependent on the following factors that are of relevance to the White Paper:

1. The rate of productivity growth achieved by the sector;
2. A stable policy environment at all levels of government that supports open and free trade, investment in research and development, foreign investment, and natural resource management;
3. A highly skilled domestic work force; and

4. Competitive supply chains that allow Australian producers to capture their competitive advantages in export markets.

## 2 HASSAD AUSTRALIA

HA is an Australian registered company, with long term investments in grain and sheep meat production with 14 aggregations in Australia from Southern Queensland to the central wheat belt in Western Australia.

As a sovereign foreign investor, HA undergoes a Foreign Investment Review Board (FIRB) approval process for every dollar we spend, regardless of the level of investment. There is no investment threshold for HA.

We operate by Australian taxation and corporations' law and governance, and pay industry levies on our commodities as they are handled through domestic logistic chains.

The company has a board of six, including four Australian directors. We have a highly skilled Executive Management Team, all of whom are Australian.

We strive to be an organisation that excels in its corporate responsibilities by being a good corporate citizen and actively contributing to and supporting the local communities where we operate. Through our investments we are building a leading Australian agriculture company committed to excellence in food production.

## 3 SPECIFIC RESPONSES TO THE ISSUES PAPER

In this section we have provided responses to some of the topics canvassed by the Issues Paper that we believe are relevant to HA and corporate agricultural companies more broadly.

### ENSURING FOOD SECURITY IN AUSTRALIA AND GLOBALLY

#### **The importance of trade**

HA carries a mix of Merinos, crossbred and Awassi sheep on the east coast operations, and grows a range of crops in rotation with wheat and barley. HA production is aimed at both export and domestic markets, but there is a focus on exporting to the Middle East as we see market opportunities and security based on our parent company's connections.

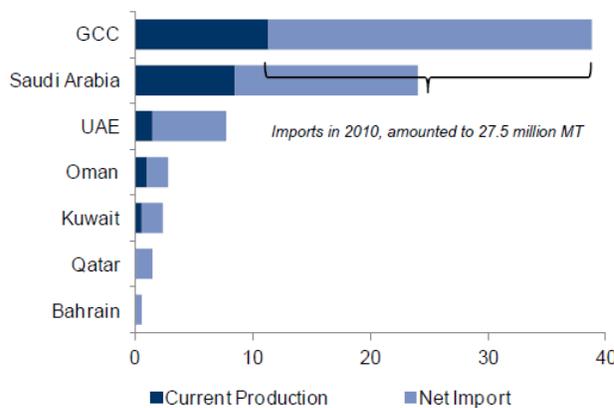
HA is also confident of opening further markets in the Middle East which can benefit other Australian exporters.

Not only is Qatar an attractive market in its own right, the country is a member of the Gulf Cooperation Council (GCC). The countries of the GCC have a combined population of over 42m people which is growing at over 4 per cent annually, is young, and increasingly urbanised.

The GCC is a common market in the Middle East and launched on 1 January 2008. It grants equal treatment to all GCC firms and citizens in any other GCC country and in doing so removes all barriers to cross country investments, services and trade.

The region is increasing its demand for a wide range of high quality safe fresh foods. But the region has limited natural resources able to satisfy this demand and will be dependent on increasing levels of food imports (see Figure 2). Australia, with existing trade links and investments by GCC members such as HA, is well placed to grow its exports to this region.

**Figure 1: High levels of GCC food imports due to low food production capacity - 2010**



Source: (ALPEN CAPITAL Investment Banking, 2013)

However, to remain competitive in this market (for investment and exports) it is critical that Australia continues to improve its agricultural and supply chain productivity.

### The role of technology

Improvements in technology will continue to be critical to the competitiveness of Australian agriculture. The areas of particular importance for HA at present and which are relevant to the White Paper are:

- Improving remote and regional telecommunications;
- New crop and pasture varieties that will improve tolerance to climate events such as drought and frost; and
- Genomics that will accelerate genetic gains, and allow the identification and then selection for a wider range of economically important traits in livestock.

## FARMER DECISIONS FOR IMPROVING FARM GATE RETURNS

### Scale and diversity of production

A key challenge for corporate agriculture is to capture economies of scale after the additional governance, compliance and reporting costs have been incurred. Scale economies have eluded a number of large corporate investments over the years often due to cumbersome management structures, unwieldy governance and too much centralisation.

Corporate agriculture is subject to considerable additional compliance costs above that of small family farms. To offset this level of compliance, corporate agricultural companies must achieve economies of scale even greater than they would do if they did not have these additional costs.

Increasing the regulation of corporate agriculture would mean that even greater economies of scale would need to be achieved to offset the additional costs this regulation would bring.

Increasing the level of regulation and compliance corporate and foreign investment agriculture is subject to will make Australia less competitive in international capital markets.

Corporate investment (irrespective of its origin) makes possible much larger capital intensive projects such as the claying of non-wetting sands at HA's property Telopea Downs on the Victorian – South Australian Border (see Case Study 1). However, while individual large scale capital intensive programs are important, HA is also investing heavily in the development of all of its properties to increase crop yields and stocking rates each year. For example, HA has extensive pasture renovation programs across its entire portfolio of livestock properties covering more than 220,000ha of pasture. The objective of these programs is to lift stocking rates by 20 per cent over the next 5 years.

#### Case Study 1: Telopea Downs: Victorian – South Australia Border

Telopea Downs Station, comprises nine Victorian properties and an adjoining block on the South Australian side of the border, totalling 40,450 hectares.

HA is providing a level of investment in production capacity and also natural resource management that would simply not be possible as a family farming operation.

HA is working on increasing productive capacity not by further expansion, but by significantly boosting the station's carrying capacity.

When HA purchased Telopea Downs, the aggregation had a combined carrying capacity of around 150,000 dry sheep equivalent (DSE). By carrying out improvements to the soil, pest control and pastures, the carrying capacity will be increased to 200,000 DSE.

There are a number of other areas being looked at to improve productivity, including addressing issues such as erosion caused by the huge population of rabbits.

It is estimated that 2% of Telopea's productive land area is lost to rabbits. It's also a huge problem for the shire, and an issue that needs to be solved with a coordinated approach. HA currently spends around

\$150,000 a year in rabbit control, and works closely with Council to make sure the control activity has an impact across the landscape, not just on HA land.

HA has also put strategies in place to increase productivity of the soil on Telopea.

The practice of claying not only lifts productivity considerably, but also helps protect landscapes from erosion degradation. It is by addressing issues of erosion, and by stabilising the soil, that the country can be returned first to grass, and then to native vegetation.

Those areas of vegetation can then be tied into existing stands to create more vegetation corridors.

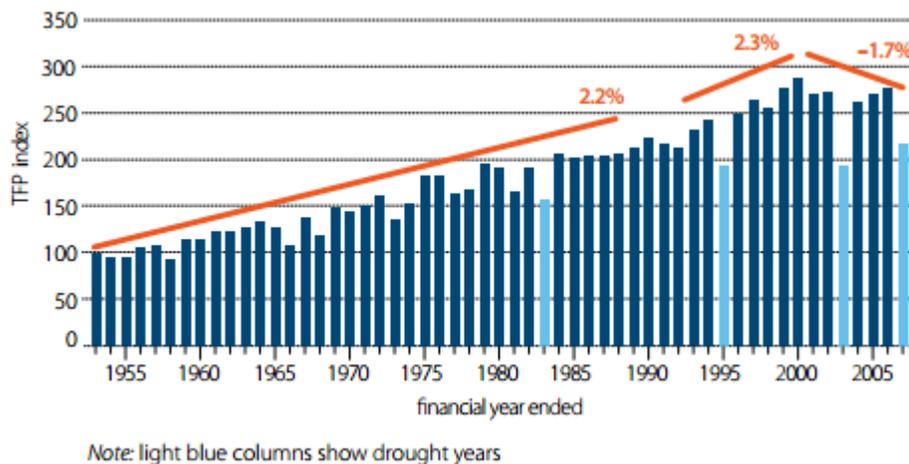
HA is committed to further R&D in this area and has recently engaged a soil scientist to help analyse the impact and benefits of the claying program. The results of this work will be made readily available to anyone in the community who is interested.

### Productivity growth

Improving the rate of productivity growth is one of the most important challenges facing Australian agriculture. Agricultural productivity growth must at least match the rate at which competitors in export markets improve their productivity for Australian producers to maintain their market share.

Recent research suggests that the rate of productivity growth may have slowed (Sheng, Mullen, & Zhao, 2011). Figure 2 shows the long run trends in Australian agriculture's productivity growth. Sheng, Mullen and Zhao (2011) conclude that while there is considerable volatility in productivity rates, a structural decline in productivity growth has been identified in the mid 1990's most likely due to a reduction in agricultural R&D expenditure and a run of adverse seasons.

**Figure 2: Trend change in TFP for broad acre agricultural industry, 1952-52 to 2006-07**



Source: (Sheng, Mullen, & Zhao, 2011)

HA, like a number of other corporate agricultural companies, has a diverse portfolio of properties that have been established in part to spread the risk from drought and other climate variability.

This means HA may be able to reduce the risk of further declines in productivity growth attributable to adverse seasons.

As well as being competitive in export markets, agriculture must also be able to compete for the essential factors of production (land, labour and capital) within the economies it operates.

This means that while the absolute rate of productivity growth in agriculture is important, more important is the relative rate of productivity growth between agriculture and other sectors of the economy, and our competitors in export markets.

Competitive rates of productivity growth will assist agriculture to compete with other sectors of the economy for its inputs and address a number of the competing demands the community places on it to provide food and manage its environmental footprint.

Higher rates of productivity growth will assist Australian agriculture to:

1. Attract and retain labour;
2. Be an attractive investment option for domestic and international sources of finance;
3. Manage fluctuations in market and climate risks;
4. Invest in research and development; and
5. Invest in protecting the natural resources impacted on by the sector.

There are a number of factors that contribute to agricultural productivity “...including improvements in infrastructure and communications, higher quality inputs, and new technologies developed and implemented as a result of agricultural research and extension activities.” (Mullen, 2007a).

Most of these factors feature in the Agricultural Competitiveness Issues Paper in one form or another but HA believes the primary outcome of the White Paper should be a policy environment that is conducive to increasing the rate of agricultural productivity growth.

### **Social and environmental pressures**

There are increasing and often competing demands placed on Australia agriculture by the community. As consumers of Australia’s agricultural outputs, the community predominately votes with its wallet for value-for-money, safe and nutritious food. However, the community also wants agricultural production in Australia to be undertaken within increasingly narrow environmental and animal welfare standards.

To date Australian agriculture has been able to compete in domestic and world markets and by and large meet the expectations of the Australia community in regards to natural resource management (see ). However, in recent times more extreme views about Australian agriculture’s management of the natural and in particular animal resources have emerged.

The emerging dichotomy facing agriculture is a serious threat to Australian agriculture’s competitiveness if extreme views constrain the ability of Australian farmers to meet the demands

of consumers for value for money produce. Both Australian farmers and domestic consumers would suffer to accommodate the demands of what appears to be minority views.

Long term sustainability, profitability and community acceptance for corporate agriculture will only come from investment in best practice production, and leadership in:

- Environment
- Animal welfare
- Health and safety
- Corporate Social Responsibility which includes our people

An example of our approach to environmental management is outlined below in Case Study 2.

In the area of animal welfare, HA invests in a number of initiatives to ensure it meets the reasonable expectations of the communities within which it operates. For example, HA has appointed an independent animal welfare advisory committee (IAWAC) to provide advice on best practice approaches to animal welfare. The animal welfare policies HA is working on with the help of the IAWAC committee include:

- Live export standards;
- Land transport standards;
- Euthanasia guidelines;
- Bio-security;
- Sheep husbandry and disease control;
- Drought management planning;
- Crisis management planning; and
- Livestock handling infrastructure standards.

HA's approach to Health and Safety, Corporate Social Responsibility (CSR) and capacity building of its staff is outlined later in this document.

#### Case Study 2: Western Australian aggregations

- Bindana Downs, Bindi Bindi – 8,483ha
- Amarina, Jerramungup/gairdner– 14,672ha
- Yupiri, Esperance – 8,340ha

HA has only been operating in the west for around two years so it is still a “work-in-progress”. In 2013-14 there was a total of 27,000 ha under crop and a harvest of around 50,000 tonnes of barley and 13,000 tonnes of canola. This has vindicated the risk management approach of a geographic spread of properties as many of the crops on the east coast were hit heavily with frost and a dry end of season.

Rotation crops are a big component of our production generally, with a two cereal crops to one canola crop rotation.

The aim is to establish all operations on best practice tramline farming systems and variable rate technology.

HA believes it's important to invest in improving not only the productivity, but also the environmental management of our properties.

Farming systems are seen as one of the best investments into environmental management a farm owner can do. Good farming systems build soil condition, increase carbon (which is our best fertiliser), reduce erosion and offsite travel of nutrients, increase biodiversity, create efficiencies, and maximise productivity.

HA also takes very seriously stewardship of the land, and manages to maintain and enhance existing habitats and environmental offset areas. These assist in maintaining biodiversity in species, provide harbour for beneficial species, assist with managing landscape degradation and salinity, as well as make for a good aesthetic landscape.

Weed resistance management is one of HA's most critical management challenges in the cropping systems being run in WA.

Minimum till is also helping slow the water run-off and reduce erosion and as a result restore the vegetation around many of the creek lines.

In time HA aims to identify the least productive areas on all aggregations and return them to natural vegetation.

All of the HA properties undergo a Property Management Planning Process, and as part of this plan a Vegetation Management Plan is a key component.

## ENHANCING ACCESS TO FINANCE

### Foreign Investment

The design of foreign investment policies must ensure that risks of inappropriate investments are reduced, but that Australia is competitive in international capital markets.

There are two overarching principles that HA believes should guide policies in regards to foreign ownership in Australia. They are:

- The design of any policy must be seen in the context of what competitors for foreign agricultural capital are doing; and
- The policy must avoid preferentially treating or prejudicing one type of investor over another. It would be economically inefficient and damaging to the sector if significant distortions are created by foreign investment policy in Australian agricultural capital markets.

We believe that several important aspects of foreign investment, and in particular sovereign foreign investment, have not received sufficient recognition in recent debates about the merits of foreign investment.

In our view, as an Australian company owned by a sovereign foreign investor:

- Sovereign investors contribute patient capital, and typically take a much longer term view of the investment. This investment approach is more aligned with the commercial performance and volatility of Australian agriculture;
- Sovereign investors (and/or when their constituents invest) can contribute to improved market access for exporters from both countries, less interference and volatility in bilateral trade, and opportunities to improve trade in other sectors of both economies; and
- Sovereign investors often have more incentives to be transparent in their dealings to ensure good diplomatic and commercial relationships are maintained between the respective countries as there is often a wider trading relationship to protect.

We would encourage that the White Paper process consider these factors in deliberations regarding investment, and the availability of capital, in Australian agriculture.

## ENHANCING AGRICULTURE’S CONTRIBUTION TO REGIONAL COMMUNITIES

### Contribution of agriculture to regional communities

HA recognises that resilient regional communities are required to support agricultural production. Regional communities provide:

- A pool of labour and accommodation for the rural workforce (particularly those people involved in seasonal work and contracting work across a number of farms);
- Commercial services to the farms;
- Medical, educational services
- Partner/spouse employment opportunities; and
- Support for the social demands of rural employees and their families. A good lifestyle in association with a rewarding job is critical to retain staff.

In recognition of the important role vibrant rural communities play in agriculture, HA has introduced a policy of buy local where possible and reasonable for all of our aggregations. HA also actively supports employees’ contributions to important local community institutions such as rural fire brigades, sporting clubs, show societies etc.

## IMPROVING THE COMPETITIVENESS OF INPUTS INTO THE SUPPLY CHAIN

### Research and Development

One of the most important contributions to increasing agricultural productivity is ongoing investment in research and development (Mullen, 2007).

HA conducts a number of research and development activities internally and has formed an R&D Working Group within the senior management team to coordinate HA research investments, ensure the research findings are implemented across the company, and to identify where there is potential for collaboration with other producers and publicly funded research organisations.

Some examples of HA research currently underway include:

- Minimum tillage and fertiliser trials on our properties in WA;
- An 18,000sq/m soil claying / soil carbon trial at Telopea Downs in conjunction with the Victorian Department of Environment and Primary Industries;
- The relationship between ewe condition score and fertility in exotic sheep breeds crossed with merinos;
- Pasture and crop variety trials across most of our aggregations; and
- Measuring and validating pasture growth by month and by species, to help inform and improve pasture management decisions.

However, while HA has sufficient scale to be able to undertake some of its own research, HA is also a major contributor via R&D levies to Meat & Livestock Australia, Australian Wool Innovation, and LiveCorp, and is reliant on research and development findings from a wide range of R&D institutions in Australia.

### Infrastructure to assist development

Infrastructure investment is an important contributor to the rate of productivity growth on Australian farms. Farmers benefit from post farm gate infrastructure investments as, in competitive markets, part of the efficiencies gained are passed onto farmers in the form of higher commodity prices and/or improved services.

In HA's experience there are also extensive productivity gains from improving pre-farm gate infrastructure. This is an area that is often overlooked in infrastructure policy development.

HA has acquired a large number of individual farms since 2009 to put together its 14 aggregations across Australia. Typically, each of our aggregations is made up of 4 -5 individual commercial scale farms. Once these farms are acquired, HA conducts an extensive Work, Health and Safety (W,H&S) audit of the infrastructure of each farm. These audits provide a list of the infrastructure that does not comply with the W,H&S standards that HA is legally required to meet, and HA's own infrastructure standards.

While HA only has experience of the farms it has acquired, if these farms are representative of the state of wider Australian farm infrastructure, there is a substantial opportunity for the sector to improve productivity and W,H&S standards by upgrading on-farm infrastructure. In our experience up-grading on-farm infrastructure could provide higher productivity gains than the farm sector might capture from post farm infrastructure investments.

The most common forms of inadequate infrastructure identified in the HA property audits over the last 5 years are:

1. Non-compliant chemical storage facilities;
2. Working at heights risks from ageing and non-compliant silos, windmills and grain sheds;
3. Unsafe structural integrity of ageing buildings (including woolsheds, sheep and cattle yards, machinery and hay sheds, accommodation and workshops);
4. A lack of bunding on fuel storage facilities >10kL; and

## 5. Untreated asbestos-containing materials in buildings.

In addition to the W,H&S audit findings, HA invests capital into on-farm infrastructure to improve the productivity on the farms it acquires. The most common productivity investments on the properties that HA acquires are:

1. Water reticulation systems for livestock;
2. Fencing and lane ways that improve livestock management efficiency; and
3. Staff accommodation.

HA has an extensive capital expenditure program to upgrade on-farm infrastructure which has a positive return in regards to staff safety, labour productivity and staff retention.

HA strongly recommends that the White Paper process considers what policies could be implemented that would increase incentives to improve on-farm infrastructure.

### Telecommunications

One of the most significant post farm gate infrastructure constraints facing Australian agriculture is the lack of reliable telecommunications in regional areas. Agriculture's reliance on collecting, collating and analysing data from operating activities day to day is dramatically increasing the need for increased bandwidth and mobility of telecommunications services on-farm.

Through the NBN the Australian Government has assumed responsibility for much of the telecommunications infrastructure in Australia. At present telecommunications in regional areas is a serious infrastructure and technology bottle neck that urgently needs to be addressed.

Telecommunication improvements also have significant work safety benefits as:

- Staff working in remote locations are able to call for advice, assistance or emergency services when needed;
- Vehicles are able to be tracked and located if staff become incapacitated; and
- Staff working in remote locations are able to access health services online in the first instance in the event of illness or injury.

Telecommunications limitations are impacting the development of on farm autonomy and decentralisation of central management systems particularly accounting and administration. Decentralisation of these activities would improve HA productivity by reducing head office and corporate costs.

### Skills, training, education and human capital

#### *Human capital*

HA notes that the White Paper does not mention the critical role that W,H&S plays in the competitiveness of the agricultural sector. Australian agriculture cannot improve its competitiveness if it does not offer safe and healthy work places for its employees.

HA employs more than 100 people across its operations in Australia and this number is increasing. In March 2013 Safe Work Australia released a report on the health and safety performance of Australian agriculture (Safe Work Australia, 2013). Work Safe Australia found that:

- Farms employ 3% of workforce but experience one in six work deaths;
- In the eight years to June 2011, some 365 workers were killed on Australian farms - about 17 per cent of all worker fatalities; and
- On average 44 farm workers are killed each year and another 17,400 suffer a work-related injuries.

HA places the health and safety of its employees at the centre of its operations. HA invests in industry leading health and safety programs and policies for its employees and has reduced the amount of lost time to injury of its work force by 25 per cent over the last 12 months to well below the industry average.

Ultimately, HA's goal is to be the industry leader in Health, Safety and Environment (HSE) through:

- On-farm and supply chain policies and protocols;
- Influencing the development of WH&S in all our contractors;
- Mandatory and ongoing WH&S training for all staff;
- Monitoring and reporting of WH&S; and
- Support of industry bodies such as the Corporate Agriculture Group (CAG), who benchmarks lost time to injury frequency rates (LTIFR) across its members.

HA is a leader in workforce health and safety and has developed and implemented a comprehensive range of safe operations policies. HA is now embarking the next phase of its work safety program by reinforcing a safe and healthy work culture at all levels of the company.

### *Skills and training*

Career development and skills training is also encouraged as HA is highly reliant on the skills and experience of all of its staff for its success. The continued supply of highly skilled, trained and educated staff at all levels of our operations is essential. HA recognises the role that a wide range of educational institutions (private and public) play in the supply and development of a highly trained workforce.

In 2014 HA launched its Next Generation Leaders Program. This program offers 4 graduates from Australian agricultural tertiary institutions the opportunity to rotate around a number of our operations, including corporate roles, over a two year placement. HA's investment in its graduate program is based on our belief that our future, and that of Australian agriculture in general, is dependent on attracting and retaining highly qualified, skilled young entrants into the industry.

To contribute to increases in productivity, agricultural workforce development programs must:

- Be appropriate to the needs of modern agriculture where technology, science and telecommunications will play a much greater role;
- Be able to identify emerging demand for new skills early and develop them quickly; and
- Ensure labour has the ability to move efficiently between enterprises in response to seasonal and market changes.

Corporate agriculture can play an important role in attracting new entrants by offering:

- Structured career paths;
- Training in all aspects of a modern enterprise including W,H&S, animal welfare and environmental management;
- Specialisation within an agricultural enterprise (agronomy, finance, economics, animal husbandry, marketing etc); and
- Specialised human resources support to assist new entrants plan, manage and progress their career in agriculture.

Improving skills in corporate agriculture has and will continue to have some important spin-off benefits for all agricultural businesses as it will develop a pool of highly skilled new entrants that will look for opportunities across the whole sector.

## Reducing ineffective regulations

### Efficiency and effectiveness of regulations, including environmental regulations

A stable and predictable policy environment enables longer term plans to be formulated and delivered. HA is a subsidiary company of a parent that has a number of investment alternatives. An unstable policy environment increases the risk premium that investors (irrespective of their origin) will place on the returns that they demand from investing in Australian agriculture. The higher the required rate of return on capital invested in Australia the less competitive Australia becomes for investment.

As a sovereign investor in Australia, HA has enjoyed a good working relationship with all levels of Australian Governments and their agencies, and in particular the Foreign Investment Review Board.

HA recognises that public policy is dynamic and must respond to changing community views and economic circumstances. However, when policy changes need to be made a process conducive to a smooth industry transition is required. It is also incumbent on the sector to ensure it is responsive to community expectations as they change and when those changes are reasonable.

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