



1. Introduction.....	1
2. History of fruit and vegetable canning in Australia	1
3. Fruit and vegetable canning in NSW – the current position	4
4. Conclusion.....	9

NSW Canned Fruit and Vegetable Production: Past, Present, Future?

by John Wilkinson

1. Introduction

In March 2013 Windsor Farm closed its canning operations at Cowra, with the loss of 70 jobs.¹ Apart from Billabong Produce's relatively small tomato canning operations at Jerilderie², the only major producer of canned vegetables remaining in NSW is Simplot at Bathurst (principally processing sweet corn). Simplot, in turn, has stated that it too might consider closing its operations because of the current "very competitive food industry environment".³

This e-brief looks at the emergence of the canned fruit and vegetable industry in NSW, and at its progress in recent years. It is part of the wider industry of fruit and vegetable processing which, in turn, is part of the food manufacturing sector. Food manufacturing is the largest single component of the manufacturing sector. The broad issues around food production and manufacturing can be considered in light of the National Food Plan (NFP), the text of which can be found [here](#).⁴

2. History of fruit and vegetable canning in Australia

2.1 The Emergence of Fruit and Vegetable Canning

Canned fruit production, in NSW, began in tandem with the inauguration of irrigated agriculture in the Murrumbidgee-Murray area in the early 1900s. A cannery was opened at Leeton in 1914 (with the produce sold under the "Letona" brand).⁵ Production expanded during the era of Prime Minister Stanley Bruce's imperial framework of "men, money and markets". In 1926 a Canned Fruit Export Control Board (CFECB) was established. The British and Australian governments agreed that the duty on British imports of Australian canned produce would be levied at a rate of 1.78 pence per dozen cans (as opposed to 2.82 pence/dozen on cans from non-empire sources). With privileged access to the British market, fruit canning at Leeton reached its heyday during the late 1930s. In one day at the Leeton Cannery, in early Autumn 1939, 850 workers processed 350,000 cans.⁶

In the 1920s and 1930s primary production was a major component of the State's economy, with Bertram Stevens, then

NSW Premier, declaring in 1934 that “New South Wales is predominantly a pastoral and agricultural State.”⁷ Australia wide, between the late 1920s and the late 1940s, primary production consistently amounted to around 20% of gross domestic product (GDP):

Primary Production Share of GDP (Australia): late 1920s – late 1940s ⁸	
1928	20%
1938	23%
1948	21%

Canned vegetable production received an artificial boost during the Second World War. Production had already begun to expand, during the twentieth century, with the establishment of the cannery at Leeton and subsequently the Edgell cannery in Bathurst (1926). After Japan launched the Pacific War (in December 1941), over 500,000 American military personnel were temporarily based in Australia and New Guinea. DP Mellor wrote that, “A large part of the supply of vegetables for the services was drawn from Leeton and Griffith. . . from Bathurst, Cowra and Windsor. . .the Goulburn Valley in Victoria. . . and. . .Tasmania.”⁹ In 1943, Edgell acquired 600 acres, near Cowra, to grow peas, green beans and tomatoes: and established a new cannery.¹⁰ In the second-last year of the war, the Leeton cannery processed 12,500 tonnes of vegetables.¹¹

After World War II, Britain continued to guarantee a market for Australian canned produce. According to Bruce Davidson, “An agreement was signed under which all surplus Australian. . . canned fruits would be sold to the United Kingdom for a period of three years. These agreements were then extended. . .until 1954.”¹² In 1958, Australia produced around 76,000 tonnes of canned fruit: 93% of which was exported to Britain.¹³

Whereas Victoria has dominated fruit production and processing in Australia,¹⁵ NSW has occupied a more prominent position in vegetable production:

Area of Vegetables for Human Consumption (States): 1985 ¹⁴		
State	Hectares	%
Queensland	30,451	27.8
Victoria	26,020	23.7
New South Wales	22,379	20.4
Tasmania	16,156	14.7
South Australia	8,029	7.3
Western Australia	6,609	6.0

Vegetable production, unlike fruit growing, was mainly focused on the domestic market. In 1992 the Australian Bureau of Agriculture and Resource Economics (ABARES) noted that:

vegetables are grown commercially in all states of Australia. . .[and] are largely produced for domestic production.¹⁶

Canned fruit was protected from competing imports by tariff duties. The Bureau of Agricultural Economics (BAE) observed that, during the 1980s:

Imports of canned fruit into Australia are subject to a tariff of 10 per cent, except for canned fruit from developing countries. . . which is subject to a 5 per cent tariff. . .¹⁷

Imported vegetable products were also subject to protective import duties. In 1985 the Bureau of Agricultural Economics noted that:

vegetable products receive a rate of protection of about 12 per cent. . . assistance [is also] afforded. . . in the form of quarantine regulations on fresh products (that effectively prohibit imports of some fresh vegetables and severely limit the imports of others). . .¹⁸

2.2 Decline of Fruit and Vegetable Canning

A series of inter-related developments contributed to the decline of fruit and vegetable canning. Firstly, in 1973 the UK joined the European Economic Community. Britain's application of EEC tariffs to Australian primary products led to an instant decline in Australian exports of canned peaches and pears:

Canned Peach and Pear Exports (Australia): 1972/73 – 1989/90 (tonnes)¹⁹	
1972-73	136,300
1980-81	53,600
1985-86	43,500
1989-90	35,000

Secondly successive federal governments embarked on a profound restructuring of the economy in which, eventually, the relative contribution of primary production (and that of manufacturing) to GDP would shrink and that of the services sector would expand:

Sectoral Composition of GDP (Australia): 1950/54 – 2007/08²⁰				
	Primary Production	Manufacturing	Mining	Services
1950-54	22%	29%	2%	47%
1960/64	16%	28%	2%	54%
1970/74	9%	26%	3%	62%
1980/84	5%	20%	6%	69%
1990/94	3%	15%	5%	77%
2007/08	2%	10%	7%	81%

Thirdly, as part of the process of restructuring the economy, the rates of import duty for canned fruit and vegetables were reduced as follows:

Rates of Import Duty for Canned Fruit: 1992 – 1996²¹	
1992	10%
1996	5%

Rates of Import Duty for Canned Vegetables: 1985 – 2000²²	
1985	12%
2000	5%

3. Fruit and vegetable canning in NSW – the current position

3.1 The Status of Fruit and Vegetable Processing within NSW Food Manufacturing

In NSW, during financial year 2006-07, fruit and vegetable canning ranked eighth amongst the State's top 10 areas of food processing, a position which is likely to have declined further due to the developments discussed below:

NSW Processed Food Industry (Top 10 Components): 2006-07 (by Sales and Service Income)²³	
Meat Processing	\$2.4 billion
Poultry Processing	\$1.7 billion
Soft Drink, Cordial and Syrup Manufacturing	\$1.6 billion
Wine	\$1.5 billion
Flour Mill Products	\$1.4 billion
Other Dairy Products	\$1.4 billion
Cereal Food and Baking Mixes	\$1.0 billion
Processed Fruit and Vegetables	\$979 million
Bacon, Ham and Smallgoods	\$902 million
Prepared Animal and Bird Feed	\$758 million

3.2 End of NSW Fruit Canning

The combined impact of the loss of the UK market, as well as the gradual reduction of protection from imports, led to the decline of fruit canning in NSW. In 1994 the Leeton Cannery closed. Eight years later, the much smaller Mountain Maid cannery (at Batlow) closed as well.²⁴

3.3 Continued decline of vegetable canning

In the twenty-first century, vegetable growing continues as an agricultural activity in NSW, although its share of national output is relatively small as illustrated in the accompanying table:

Gross Value of Vegetable Production by State and Territory (Fresh and Processed): 2010-11 (% Total)²⁵		
<u>State/Territory</u>	<u>Amount</u>	<u>Total</u>
Queensland	\$1 billion	32%
Victoria	\$722 million	22%
South Australia	\$502 million	15%
New South Wales	\$439 million	13%
Western Australia	\$357 million	11%
Tasmania	\$186 million	6%
Northern Territory	\$52 million	2%
ACT	\$0.4 million	0%

In respect to vegetable canning, in 1992, Pacific Dunlop (which in 1991 had acquired Edgell's operations) closed the latter's Cowra plant. Pacific

Dunlop's requirements for canned tomatoes were provided by imports. Nevertheless, a year later, the Cowra Export Packers Co-operative Pty Ltd began renting the Cowra facilities from Pacific Dunlop.²⁶ In 1997, Cowra Export Packers Co-operative Pty Ltd was acquired by Windsor Farm. By the beginning of the twenty-first century Windsor Farm was specialising in canned asparagus and mushrooms. As the NSW Department of Primary Industries reported in 2005, "The Windsor Farms Foods factory at Cowra is the only asparagus and mushroom processor in Australia."²⁷ In early 2013, as mentioned above, Windsor Farm ceased operations.

3.4 Multinational Agribusiness in NSW Vegetable Canning

In 1995 the American company J.R. Simplot (the biggest supplier, in the USA, of potatoes to McDonald's)²⁸ set up operations in Australia (basing its headquarters in Melbourne). The company's principal aim was to engage in activities similar to its specialty in the USA. To this end, Simplot took over Edgell: with a view to expanding the latter's potato processing works at Ulverstone in Tasmania. In tandem with its Ulverstone acquisition, the company also gained control of Edgell's Tasmanian frozen vegetable plant at Devonport. By the beginning of the 21st century, Simplot had negotiated a contract with McDonald's Australia to be its exclusive supplier of chips.²⁹ In 2012-13, according to IBISWorld:

Simplot has the largest market share of frozen vegetable production in Australia. . .³⁰

In taking over Edgell, Simplot also acquired the former's plant at Bathurst. The company proceeded to focus its Bathurst operations on canning and freezing sweet corn: the Bathurst plant becoming the biggest processor of sweet corn in Australia.³¹

Simplot remains in operation at Bathurst (employing 170 full-time equivalent staff)³² and exercises a major influence in NSW on the production of vegetables. This was highlighted in a 2008 table produced by the NSW Department of Primary Industries:

Vegetables Suitable for Canning (Australia/NSW): 2008 Output (tonnes)³³			
<u>Vegetable</u>	<u>Australian Production</u>	<u>NSW Production</u>	<u>NSW % of Total</u>
Sweet Corn	62,575	38,726	61.9%
Tomatoes	296,035	35,937	12%
Carrots	271,464	31,181	11.5%
Beetroot	40,765	1,440	3.4%
Green Peas	15,765	192	1.2%
Asparagus	65,609	40	0.7%

3.5 Competition from Imports

Between the closing years of the twentieth century and the early years of the twenty-first century, imports of processed vegetables were far greater (in value) than exports. In 2006, ABARES provided the following statistics for imports and exports of processed vegetables from 1992-93 to 2004-05:

Processed Vegetables (incl. Canned): Imports/Exports (1992/93 – 2004/05 approx.)³⁴		
	<u>Imports</u>	<u>Exports</u>
1992-93	\$230 million	\$25 million
2004-05	\$279 million	\$50 million

This trend has continued between 2005-06 and 2011-12, as indicated by the latest issue of the ABARES publication *Agricultural Commodity Statistics*, where the data relates to both fruit and vegetables:

Fruit and Vegetables: Substantially Transformed (incl. Canned) Imports/Exports (2005/06 - 2011/12)³⁵		
	<u>Imports</u>	<u>Exports</u>
2005-06	\$1 billion	\$555 million
2006-07	\$1.2 billion	\$574 million
2007-08	\$1.4 billion	\$568 million
2008-09	\$1.5 billion	\$575 million
2009-10	\$1.4 billion	\$523 million
2010-11	\$1.5 billion	\$571 million
2011-12	\$1.7 billion	\$625 million

3.6 Home Brands and Imported Produce

Since the 1960s, there has been an ever increasing use of “home brand” (or “private label”) products by the supermarket chains. In 1964, Coles introduced its “Farmland” range.³⁶ In 2008, Woolworths had six private label brands; Coles had four; IGA had the “Black and Gold” range; and ALDI had an unknown (but extensive) range of private labels. The publication *Retail World* has estimated that “home brand” products represented 15% of Coles’ grocery sales, and 13% of Woolworths’. Private label products are often imported. As the Australian Competition and Consumer Commission (ACCC) observed, “Imports are often a viable alternative to domestic supply. . . particularly for private label”.³⁷ Moreover, according to IBISWorld, private label brands are the “fastest growing” when it comes to processed fruit and vegetables.³⁸

In the area of sales of sweet corn, in which Simplot specialises, private label shares (as estimated by *Retail World*) account for nearly 25% of grocery sales:

Grocery Sales of Sweet Corn (Australia): 2012 (%)³⁹	
Simplot	65.1%
Private Label	24.9%
Heinz	9.5%
Greenland Pacific	0.4%

In 2013, Simplot provided the following price comparison of the Coles brand of tinned corn (sourced from Thailand) with its own product:

Simplot/Edgell v. Coles: Canned Sweet Corn Recommended Retail Price (2013)⁴⁰

Simplot/Edgell (locally produced)	\$1.69
Coles (imported from Thailand)	\$1.35

3.7 Latest Strategy of Multinationals in Domestic Food Canning

In the early years of the 21st century, multinational companies in Australia have engaged in a significant strategy of consolidation within the canned food industry. In 2005, Coca-Cola Amatil (CCA) took over SPC Ardmona (the major fruit canner in Australia). Six years later, CCA undertook a review of SPC’s operations: the outcome of which was a decision to reduce the number of SPC staff by 150. Meanwhile, in 2008, Heinz took over the Golden Circle cannery in Brisbane. In 2011, Heinz also announced a major review of its canning activities: declaring that beetroot canning would be transferred from Brisbane to New Zealand; that it would reduce staff numbers at its tomato sauce plant at Girgarre (Victoria) by 146; and that it would reduce the number of employees at its Heinz-Watties operation (in Wagga Wagga) by 38 positions.⁴¹

3.8 Simplot’s Review of its Bathurst Operations

Just as other multinationals have done, Simplot has also conducted a review of its operations: completed in June 2013. The outcome of the review, as announced by Simplot, was as follows:

- preliminary indications are that the Bathurst and Devonport plants are under threat of closure – Bathurst imminent and Devonport further in the future
- vegetable category needs to improve its profit performance by at least \$15 million to bring its returns to a sustainably satisfactory level
- the closure of the Bathurst plant would improve annual profits by \$14 million
- all interested parties (employees, unions, customers, suppliers and government) are being approached to inform them of the situation and to contribute to efforts to solve it
- should the outcome of consultations (with the parties above) indicate that Simplot does not have a sustainable financial base for the vegetable category, the Bathurst plant will gradually be closed after the next corn season.⁴²

A prominent reason presented by Simplot, for the difficulties it currently faces, is the wage differential between Australia and New Zealand, as well as between Australia and other neighbouring countries. The figures presented by Simplot, in its review, are as follows:

Food Processing: Comparative Hourly Rates of Pay (A\$) 2013⁴³

	Bathurst	NZ	USA	Europe	Thailand
Base Rate	26.82	12.15	14.57	16.11	1.25
Overtime Loading	13.41	0.0	7.29	4.03	0.63

Simplot Bathurst further cites increases in electricity, gas and water costs as considerations in its deliberations on its future. The increases, outlined in the review, are as follows:

Simplot Bathurst: Increases in Electricity, Gas and Water Bill (2006/07 – 2011/12)⁴⁴			
	2006/07	2011/12	% Increase
Electricity	\$1,700,000	\$3,000,000	77%
Gas	\$559,000	\$900,000	61%
Water	\$397,000	\$600,000	51%

In its review of its vegetable processing, Simplot has also referred to the impact of the appreciation of the Australian dollar on its operations. In the opinion of the company:

- when the Australian is strong, people can use it to buy products from overseas easily. . .this puts our Australian made products under severe competitive strain
- the dollar has been high for a long time now and, whilst we think it has the potential to fall soon, we have to respond to today's situation. . .⁴⁵

3.9 Recent Federal and NSW Government Assistance Initiatives for Simplot Bathurst

In early August this year, the federal Ministry for Climate Change and Energy Efficiency announced that Simplot Bathurst would be a recipient of a grant under the department's Clean Energy Investment Program. A sum of \$1.5 million was awarded to enable Simplot Bathurst to replace the freezing tunnels at its vegetable production works. Through the grant, the company would be able to reduce the carbon emissions, attributable to the production process, by 33%. The NSW Office of Environment and Heritage (Department of Premier and Cabinet) assisted Simplot with their application.⁴⁶

On 22 August 2013, Andrew Stoner (Minister for Trade and Investment), in association with Paul Toole (MP for Bathurst), issued a media release in which the Minister announced that the O'Farrell Government would provide further significant assistance for Simplot Bathurst. In acknowledging "the contribution [of the company] to the local economy", the Minister declared that:

To help relieve some pressure on the plant and the staff who work there, Simplot has been approved for assistance in the form of payroll tax rebates for the next three years, through the NSW Regional Industries Investment Fund.⁴⁷

Paul Toole emphasised that Simplot's Bathurst operations "was the last remaining Australian-based large-scale grower and processor of vegetables for the retail market".⁴⁸ He expanded on the Minister's announcement, adding that,

NSW Trade and Investment is working with the managers at the Bathurst plant to support their proposals for multi-million dollar efficiency upgrades to underpin the plant's ongoing competitiveness. . .The upgrades are

expected to deliver significant savings and ensure the ongoing viability of the plant. . .⁴⁹

4. Conclusion

On an overall level, Australia's food manufacturing industry is an important part of the economy. It is export focused. Canning of food, on the other hand, faces significant challenges. In April 2013, IBISWorld (in its publication *Fruit and Vegetable Processing in Australia*) made the following observation:

Australia's fruit and vegetable processing industry is in a decline phase of its life cycle. It faces increasing competition from imported and private-label products. . . Establishment and enterprise numbers are falling. . . Over the ten years through 2017-18, industry value added is expected to decline by an annualised 1.1% compared with GDP growth of 2.4% per year over the same period.⁵⁰

Vegetable processing, nonetheless, is an industry clearly important to central west of the State: it would be a considerable blow to Bathurst if it were to cease. In recent weeks the mayor of Bathurst, Monica Morse, is [reported](#) as saying that the "council will start discussions with the city's Simplot plant immediately about providing it with possible financial assistance".⁵¹ This would be in addition to the recent initiatives of the federal and State governments. It remains to be seen whether this particular sector of manufacturing has a viable future.

¹ "Cowra Cannery Closes" in *The Land*, 13 March 2013.

² According to the Australian Competition and Consumer Commission (ACCC), Billabong Produce has an annual processing tomato output of around 25,000 tonnes a year compared to the output of Kagome (trading as Cedenco) at 200,000 tonnes a year. See the ACCC, [Determination Application for Authorisation Lodged by the Victorian Farmers Federation Horticulture Group – Australian Processing Tomato Growers](#), 24 February 2012, p.33.

³ See Julian Luke, "[Bathurst Plant on Chopping Block](#)" in *The Land*, 15 June 2013.

⁴ Bureau of Industry Economics (BIE), [Evaluation of the Agri-Food Strategy: An Assessment of Recent Government Assistance to the Agri-Food Industry](#) (BIE, Canberra, 1996), p.34; Prime Minister's Supermarket to Asia Council, *Action Plan* (Canberra, 1999); National Farmers Federation, *Reform*, Winter 2002, p.5; Department of Agriculture, Fisheries and Forestry (DAFF), [National Food Plan](#) (Canberra, 2013), p.8; Department of Foreign Affairs and Trade (DFAT), [Trade in Primary and Manufactured Products: Australia](#) (2013), p.19.

⁵ William Barwick, *The Murrumbidgee Irrigation Areas: A History of Irrigation Development in New South Wales from 1884 with Special Reference on the Murrumbidgee Irrigation Area from 1906 – 1916* (B.Litt, University of New England, 1979), pp.28-30; Clem Lloyd, *Either Drought or Plenty: Water Development and Management in New South Wales* (NSW Department of Water Resources, Sydney, 1986), p.185.

⁶ Bruce first announced his policy at the 1923 Imperial Economic Conference. See W. Richmond, "S.M. Bruce and Australian Economic Policy 1923-9" in the *Australian Economic History Review*, vol.23, no.2, 1983. See also Laurie Walker, "Irrigation in New South Wales, 1884 - 1940" in the *Royal Australian Historical Society*, journal and proceedings, vol.27, part III, 1941, pp.192, 205; C.J. King, *An Outline of Closer Settlement in New South Wales*, part 1, *The Sequence of the Land Laws 1788 – 1956* (NSW Department of Agriculture, Sydney, 1957), p.238; Barwick, n.5, p.1; Lloyd, n.5, p.180.

⁷ Ambrose Pratt, *The National Handbook of Australia's Industries* (Specialty Press, Melbourne, 1934), p.100.

⁸ Geoff Miller and Andy Stoeckel, "Agriculture in the Economy" in D.B. Williams (ed.), *Agriculture in the Australian Economy*, second edition, (University of Sydney, Press, 1982), p.168; N. G. Butlin, "Australian National Accounts" in Wray Vamplew (ed.), *Australians: Historical Statistics* (Fairfax Syme and Weldon, Sydney, 1987), p.133.

- ⁹ D.P. Mellor, *Australia in the War of 1939 – 1945*, Series 4, Civil, vol.5, *The Role of Science and Industry* (Australian War Memorial, Canberra, 1958), p.586. In 1944 American troops, in Australia and New Guinea, reached a peak total of 506,702. See E. Daniel and Annette Potts, *Yanks Down Under 1941 – 1945: The American Impact on Australia* (Oxford University Press, Melbourne, 1985), p.29.
- ¹⁰ See www.edgell.com.au/aboutus; Bill Pritchard, “Foreign Ownership in Australian Food Processing: the 1995 Sale of the Pacific Dunlop Food Division” in the *Journal of Australian Political Economy*, no.36, December 1995, p.35; “Cowra Cannery Closes” in *The Land*, 13 March 2013.
- ¹¹ Robin Tiffen, *Letona: The Whole Story* (Koonadan Publications, Leeton, 1996), p.55.
- ¹² Bruce Davidson, “Rum Corps to IXL: Services to Pastoralists and Farmers in New South Wales” in the *Review of Marketing and Agricultural Economics*, vol.60, no.3, December 1992, p.352.
- ¹³ B. Owen French, “Trends in Plantings and Production of Canning Fruits in Australia and Some Other Countries” in the *Review of Agricultural and Marketing Economics*, March 1960, pp.27-28.
- ¹⁴ Bureau of Agricultural Economics (BAE), *Vegetable Growing and Processing Industries* (Canberra, 1985), Table 1.
- ¹⁵ During the late 1950s, 61% of canning-suitable peaches, and 90% of canning-suitable pears, were processed in Victoria. See French, n.13, pp.48, 55.
- ¹⁶ Ali Abdalla, James Kelly, Thilak Mallawaarachchi, Brian Phillips and Wendy Proctor, *Future Directions for Horticulture* (ABARES, Canberra, 1992), p.57.
- ¹⁷ BAE, *Deciduous Canning Fruit Industry* (Canberra, 1985), p.43.
- ¹⁸ BAE, *Vegetable Growing and Processing Industries*, pp.29-30.
- ¹⁹ BAE, n.17, p.8; Abdalla et.al., n.16, p.5.
- ²⁰ Kym Anderson, *The Impact of Manufacturing Protection on Agricultural Incentives in Australia* (Centre for International Economic Studies, University of Adelaide, 2009), p.32. The Productivity Commission remarked in 2005 that, “While agriculture has continued to grow in absolute terms, faster growth in other sectors (predominantly services industries) has seen the relative importance of agriculture decline steadily.” See [Trends in Australian Agriculture](#) (2005), p.20.
- ²¹ Abdalla et.al., n.16, p.52.
- ²² BAE, *Vegetable Growing and Processing Industries*, pp.29-30; S. Apted, P. Berry, K. Mazur, T. Mellor, C. Short and V. Topp, *International Competitiveness of the Australian Vegetable Production Sector* (ABARES, Canberra, 2006), p.41.
- ²³ DAFF, [Australian Food Statistics 2010-11](#) (2012), p.76.
- ²⁴ Tiffen, n.11, p.102; NSW Parliamentary Debates. Hansard. 28 February 2002, p.123.
- ²⁵ Therese Thompson and Kyann Zhang, [Australian Vegetable Growing Farms: An Economic Survey 2010-11 and 2011-12](#) (ABARES, 2012), p.3.
- ²⁶ Bill Pritchard, n.10, pp.30–34, 42; Bill Pritchard, “TransNationality Matters: Related Party Transactions in the Australian Food Industry” in the *Journal of Australian Political Economy*, no.48, December 2001, p.36; Windsor Farm Foods Group, *Submission to the Productivity Commission* (2009).
- ²⁷ Stephen Wade, [Vegetable Growing in the Central West](#) (NSW Department of Primary Industries, Orange, 2005), p.6; Windsor Farm Foods Group, n.26.
- ²⁸ A.V. Krebs, *The Corporate Reapers: The Book of Agribusiness* (Essential Books, Washington DC, 1992), p.369.
- ²⁹ Tasmanian Farmers and Graziers Association, *Submission to the Productivity Commission* (2006), pp.3, 7.
- ³⁰ IBISWorld, *Fruit and Vegetable Processing in Australia* (Melbourne, 2013), p.12.
- ³¹ John Mitchell, *Implementing Flexible Learning in the Workplace: Strategies, Models and Barriers in the Meat and Food Processing Industries in Regional Australia* (Australian National Training Authority, Melbourne, 2004), p.13.
- ³² Information provided by Simplot, Bathurst.
- ³³ R. Fahd and P. Malcolm, *Ground Truthing of the Sydney Vegetable Industry in 2008* (NSW Department of Primary Industries, Sydney, 2009), p.65.
- ³⁴ Apted, n.22, p.30.
- ³⁵ ABARES, *Agricultural Commodity Statistics: 2012* (ABARES, Canberra, 2012), pp.107, 109.
- ³⁶ David Burch and Jasper Goss, “Global Sourcing and Retail Chains: Shifting Relationships of Production in Australian Agri-Foods” in *Rural Sociology*, vol.64, no.2, pp.334-335.

- ³⁷ ACCC, [Report of the ACCC Inquiry into the Competitiveness of Retail Prices for Standard Groceries](#) (2008), pp.334, 361-362.
- ³⁸ IBISWorld, n.30, p.14.
- ³⁹ Retail Media, *Retail World Grocery Guide: 2012*, p.72.
- ⁴⁰ Simplot, *Vegetable Category Review Communication* (2013).
- ⁴¹ Department of Innovation, Industry, Science and Research, *Submission to the Senate Select Committee on Australia's Food Processing Sector*, pp.24-25; IBISWorld, n.30, p.25.
- ⁴² Simplot, n.40.
- ⁴³ Simplot, n.40.
- ⁴⁴ Simplot, n.40.
- ⁴⁵ Simplot, n.40.
- ⁴⁶ See "[Grant Recipients](#)" on the website of AusIndustry's Clean Technology Investment Program. Information on NSW Government assistance (with Simplot's application) provided by the State's Department of Trade and Investment and Regional Infrastructure Services.
- ⁴⁷ Andrew Stoner MP (Minister for Trade and Investment). Media Release. [Tax Relief to Save Iconic Aussie Snack](#). 22 August 2013.
- ⁴⁸ Stoner, n.47.
- ⁴⁹ Stoner, n.47.
- ⁵⁰ IBISWorld, n.30, p.11.
- ⁵¹ ABC News, "[Bathurst Council to consider providing financial support for Simplot factory](#)", 22 August 2013.

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ISSN 1838-0204