

# RETAIL DEVELOPMENT

## JULY 2005

*This report is compiled by officers of the Department of Agriculture, Western Australia, as commissioned by the Western Australian Fruit Growers Association – Citrus Council.*

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This month the following stores were surveyed:

- Coles: Carousel and Mandurah
- Woolworths: Carousel, Mandurah and Bunbury
- Action: Bunbury
- Carousel Fresh, Bunbury Farmers Market and Supa Valu (South Perth)

### 1.0 PRICE SUMMARY \$/KG

Variety		Coles	Woolworths	Action
Navel	Loose	\$1.79 - \$1.87	\$1.87* - \$2.98	\$2.99
	Bagged	\$1.65	\$1.93 - \$1.99	\$1.23*
Valencia	Loose	-	-	-
	Bagged	-	-	-
Mandarins	Loose	\$3.48 - \$3.98	\$2.98* - \$4.78	\$2.99*
	Bagged	\$2.45	\$3.28 - \$5.98	\$2.50
Grapefruit	White	\$3.48 - \$3.68	-	-
	Pink/Red	\$3.48 - \$3.68	\$2.68 - \$3.98	\$3.69
Lemons	Loose	\$2.98 - \$3.98	\$2.88	\$4.49
Limes	Loose	\$11.98 - \$12.98	\$0.98 each	\$12.99

#### *Independent Stores*

Variety		Carousel Fresh	Bunbury Farmers Market	Supa Valu
Navel	Loose	\$2.98	\$1.99	\$3.99
	Bagged	\$1.33	\$1.49	\$1.99
Valencia	Loose	-	-	-
	Bagged	-	-	-
Mandarins	Loose	\$4.99	\$2.99 - \$3.79	\$3.99 - \$4.99
	Bagged	\$2.49	\$2.99	\$0.99
Grapefruit	White	-	-	\$4.99
	Pink/Red	\$3.00 for 2	\$2.99	\$6.99
Lemons	Loose	\$3.99	\$2.99	\$3.99
Limes	Loose	\$15.99	-	-



\* Weekly Special

## 2.0 FRUIT QUALITY AND SUPPLY

- **Imperial mandarins** from WA were available all month. Overall fruit was good with only minor water mark and chemical burn problems on some specimens. Fruit from some Bindoon/Chittering growers had high levels of albedo breakdown however internally fruit was juicy and tasted nice. A few batches of old fruit were spotted, having developed mould, sour rot and off flavours. Imperials from QLD finished early in the month around the same time fruit arrived from SA. South Australian imperials on the balance looked good however there were some problems with squashing and sour rot.
- **Clementine Mandarins** from SA and NSW finished mid month. Fruit quality was variable and some fruit had problems with squashing and age related rind breakdown.
- **Hickson Mandarins** from QLD arrived early in the month. Fruit look good with only minor problems with green colouration and watermark. WA grown Hicksons were available at the end of the month and looking good.
- **Taylor Lee Mandarins** from QLD were available at one store mid month. Fruit looked good with good colour and clean shiny rind. **Tangellos** from NSW/SA/VIC and QLD also arrived mid month, fruit was variable in colour and dull looking and there were some problems with albedo and rind breakdown.
- **Navels** from SA and WA were available this month. Overall SA fruit looked good with only minor problems with green colouration. Some bagged navels from SA had problems with sour rot (see photo) and navels packed in the Woolworths plastic bags continued to have problems with mould (but less than previous months). Most WA fruit looked good with only minor problems with green colouration. Bagged WA navels looked fine however had significantly higher levels of wind and insect damage and some rind breakdown.
- **White Flesh Grapefruit** from SA was available this month. Fruit looked a little dull and had minor problems with green colouration.
- **Red flesh Grapefruit** from Carnarvon and SA was available this month. Fruit from Carnarvon looked great with good colour and clean shiny rind. SA fruit looked a little dull and was soft and lighter feeling (thick skin). Internally fruit was acidic and did not meet the minimum WA standard for Sugar:Acid ratio of 5.5:1.
- **Lemons** were of variable quality and some stores are still mixing old fruit with new. Some excellent looking lemons were available from Gingin and SA; these looked fresh and clean with only minor problems with green colouration.
- **Limes** were of poor quality again this month with yellow and patchy colouring. A line of Limes coming from far north QLD were of very poor quality on arrival with severe yellowing and rind breakdown (see photos below).



### **3.0 PRESENTATION & PROMOTION**

Overall visual presentation in supermarkets was good, however most mixed fruit from different growers and of different sizes and some mixed fruit of different grades (Imperials). Stores selling more than one variety of red and pink flesh grapefruit also mixed varieties.

Independent stores had good to very good presentation with no mixing of varieties. Apart from Navels, these stores did not mix growers, sizes or grades.

Only generic fresh produce promotion was seen in supermarkets with Coles and Woolworths promoting Australian grown fruit. Promotion was not focused on WA grown fruit and much of the fruit on sale was from the eastern states. Woolworths is using the Australian Flag to promote Australian made/grown fruit. Fruit stickered with the WA blue birthmark sticker was the only WA specific promotion in these stores.



← Some independent stores including Supa Valu in South Perth are displaying the 100% WA citrus promotion point of sale material.

### **4.0 RETAILER COMMENTS**

The following comments were received from fresh produce managers and workers during the store visits:

- All fruit has been of much better quality than last month including bagged navels from South Australia.
- Limes received from far north Queensland have been very poor quality for the last two weeks (22/07/05).
- USA lemons and navels have been arriving mouldy.
- Prepacked navels in the Woolworths plastic bags have been going mouldy in the bag.
- Problem with imperial mandarins getting squashed in the bottom of their box, send back one out of 24 boxes a day.

## **5.0 CANNING VALE MARKET**

WA Mandarin and Navel harvest was in full swing this month. Early navel varieties such as Navelina and Newhall gave way to the start of the Washington Navels early in the month and the first of the Red Navels were at Canning Vale late in July.

Quality is generally good, though as expected, late picked varieties are showing more signs of albedo breakdown and other rind disorders. Imperial mandarin supply appears to be slowing, with many growers north of Perth starting on Hicksons. Watermark has not become as big a problem as earlier feared, perhaps due to the extremely dry conditions in July.

The local 'Blue Birthmark' sticker has been popular with WA buyers and a number of agents commented that 'stickered' fruit was moving far more quickly than fruit not stickered. Some interstate mandarins had obviously been around for a while and were not being sold as quickly as they might. Carnarvon Grapefruit is looking very good, but again, growers are not taking advantage of the 'Blue Sticker' promotion.



Clockwise from left: WA Grapefruit without the blue birthmark sticker, WA Hicksons with the blue birthmark sticker, WA Washington Navels, WA Red Navels.

**Perth Market Authority: Average Weighted Prices for July 2005**

<b>Description</b>	<b>Origin</b>	<b>Unit</b>	<b>Average Weighted Price</b>
Grapefruit (Ruby)	Ord	CTN	\$25.33
Grapefruit (White)	Eastern States	CTN	\$23
Grapefruit #2 (Ruby)	Western Australia	36 L	\$12.9
Lemons	Local	22 L	\$7.92
Lemons	Local	CTN	\$21.25
Limes	Queensland	5 kg	\$41.58
Imperial Mandarins	Local	22 L	\$13.14
Imperial Mandarins	Local	CTN	\$17.86
Mandarins	Queensland	CTN	\$20.17
Navels 3Kg ProPack	South Australia	3KG	\$2.66
Navels 3Kg ProPack	Western Australia	3 kg	\$2.6
Navels	Local	36 L	\$13.58
Navels	Local	CTN	\$23.33
Navels	South Australia	CTN	23.58
Valencia's		3 kg bag	2.4

*For further detail please see the Perth Markey Authority website.*

## **6.0 INTERNAL QUALITY TESTING**

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### **Carnarvon Red Flash Grapefruit**

**% Juice:** 52%

**° Brix:** 9.2

**Sugar Acid ratio:** 7.5:1

**General:** Fruit look great with very good external colour and excellent internal colour. There was a minor problem with the wax (some white patches on fruit). Fruit smell beautiful when cut.



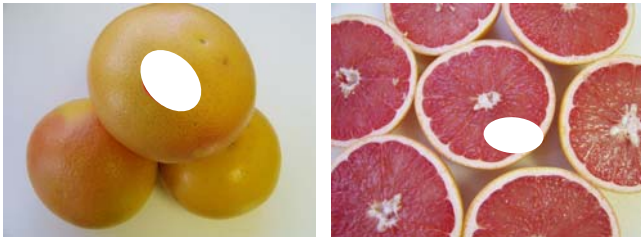
### **Carnarvon Rio Red Grapefruit**

**% Juice:** 54%

**° Brix:** 9.8

**Sugar Acid ratio:** 9.4:1

**General:** Fantastic looking fruit with excellent external and internal colour and very clean rind. Fruit smell beautiful when cut. Juice has nice sugar acid balance.



### **SA Ruby Grapefruit**

**% Juice:** 45%

**° Brix:** 9.8

**Sugar Acid ratio:** 4.8:1

**General:** Fruit look great with excellent external and internal colour. Fruit had much thicker skin than WA sample (9 mm) and very high acid.



### SA White Flesh Grapefruit

**% Juice:** 45%

**° Brix:** 12

**Sugar Acid ratio:** 5.9:1

**General:** Good looking fruit with excellent external and internal colour and clean rind. Some fruit have very thick rind (9 mm). Smell nice when cut but very high in acid.



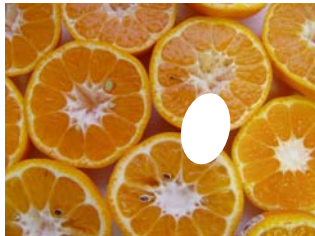
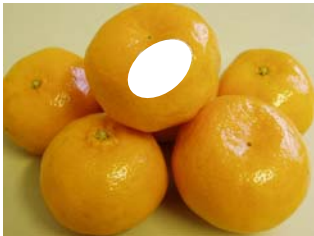
### WA Imperial

**% Juice:** 36%

**° Brix:** 13

**Sugar Acid ratio:** 17.1:1

**General:** Fruit look great with low blemish and excellent external and internal colour. Juice has nice sugar acid balance.



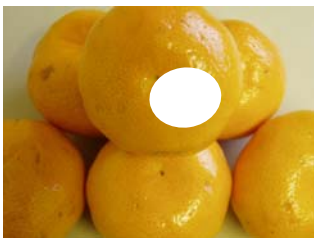
### Gingin Imperial

**% Juice:** 39%

**° Brix:** 8.2

**Sugar Acid ratio:** 20:1

**General:** Fruit look great with very good external and internal colour. Nice sweet juice.



### Yarloop Imperials

**% Juice:** 38%

**° Brix:** 10.9

**Sugar Acid ratio:** 22.7:1

**General:** Fruit look great with very good external colour and excellent internal colour. One sample collected developed sour rot over night. Bland, slightly off tasting juice.



### SA Imperial

**% Juice:** 32%

**° Brix:** 10.2

**Sugar Acid ratio:** 15:1

**General:** Fruit look great with very good external and internal colour. Juice has nice sugar acid balance.



### Queensland Hickson

**% Juice:** 52%

**° Brix:** 10.7

**Sugar Acid ratio:** 13.3:1

**General:** Fruit look great with good external colour (some small green patches) and excellent internal colour and clean rind. Juice has nice sugar acid balance.



### Queensland Hickson

**% Juice:** 49%

**° Brix:** 12.8

**Sugar Acid ratio:** 11.6:1

**General:** Clean fruit with very good external colour and excellent internal colour. Juice has nice sugar acid balance.



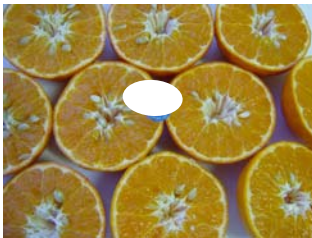
### Taylor Lee Mandarin

**% Juice:** 43%

**° Brix:** 12

**Sugar Acid ratio:** 16.4:1

**General:** Good looking large clean fruit with slightly variable external colour but excellent internal colour. Seedy fruit with nice juice.



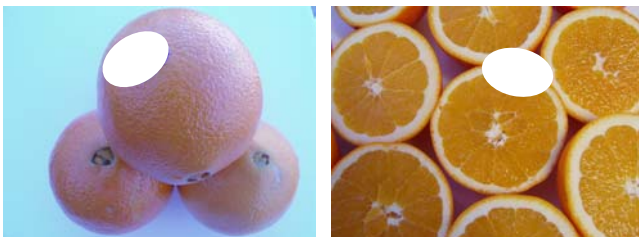
### Bindoon Navel

**% Juice:** 40%

**° Brix:** 13.8

**Sugar Acid ratio:** 10.2:1

**General:** Fruit look great with very good external and internal colour. Most specimens had had thick rind (5-8mm); those with thinner rind had problems with albedo breakdown. Juice had a good sugar acid balance.



### **Gingin Navel (bagged)**

**% Juice:** 48%

**° Brix:** 11.2

**Sugar Acid ratio:** 17.7:1

**General:** Overall fruit look fine with minor problems with green colouration, scale and moderate to high levels of wind blemish. Some fruit was squashed in the bag and some specimens had thick rind ~ 7mm. Slightly off tasting juice.

