Improving shipment protocols for apples to Japan

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Project Number: AP07050

AP07050

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Project AP07050 Improving Shipment Protocols for Apples to Japan

Final Report September 2008



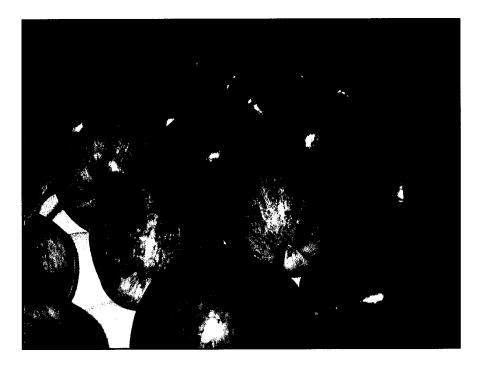
Introduction

The Tasmanian fruit industry is heavily reliant on export markets as production exceeds local domestic consumption. Tasmania's area-freedom from fruit fly also allows it to access many international markets currently unavailable to mainland Australia. In recent years the Tasmanian industry has worked diligently to develop export market opportunities for the state and national industries both in pome fruit and also in stone fruit. Market access and market maintenance remain high priorities of the industry as reflected in the Fruit Growers Tasmania (FGT) Strategic Plan.

The Tasmanian fruit industry has demonstrated a high degree of resilience in recent years. Whilst there has been some rationalisation within the apple industry there has also been some substantial new plantings of pome fruit orchards, particularly with Royal Gala and "club" varieties such as Jazz TM. Investment in the industry is being driven by the knowledge that financial rewards can be gained by providing quality produce for the upper end of world markets.

Further factors driving investment in the state is its continued area-freedom from fruit fly and other commercial pests and diseases, as well as its relative abundance and availability of water in comparison to mainland fruit growing districts. Combined with long term climate change expectations and a progressive global demand for fresh fruit, the future for the Tasmanian industry looks strong and large commercial investors are already showing interest in developing large orchards within the state.

Tasmania was granted access to Japan for Red Fuji apples in 1998 with the first commercial shipments of Fuji occurring in 1999. The export program of Fuji variety apples continued until 2005 however quality issues in relation to the fumigation, amongst other issues, hampered the commercial success of the program. In 2005 the Tasmanian industry sought access for other varieties of apples into Japan. The application was successful and Tasmania was granted access to Japan for varieties other than Fuji in 2005.



In recent years the Tasmanian industry has been developing stronger commercial ties with Japan through activities such as a Ministerial Trade Missions (Sept 2006) and the hosting of numerous Japanese delegations from consumer groups, supermarket chains and independent wholesalers and retailers. Interestingly a meeting held with AEON supermarkets in September 2006 (one of the targets supermarket chains in Japan) highlighted the concern for sourcing food in the future in a country that producers less than 40% of it own food requirements. Along with the current sentiments re global food shortages and with the populaces of China and India becoming more affluent there is considerable concern in Japan for future food supplies.

Subsequently, there had been several commercial enquiries in the last year from Japan for Tasmanian apple varieties, particularly Royal Gala. To date Tasmania has not conducted export scale commercial fumigation trials on apple varieties other than Fuji however research projects have been undertaken using Royal Gala. Past research has also indicated that apples treated with Smartfresh [™] suffer less fumigation damage than apples not treated with Smartfresh [™]. Due to the unknown extent of damage that fumigation may cause on a commercial scale trial, or with other apple varieties, individual stakeholders have not been willing to undertake a commercial trial shipment. Fruit Growers Tasmania, recognising the importance of developing this market, therefore coordinated a joint collaborative between several apple producers/packers within the state to send a trial container of fumigated apples to Japan.

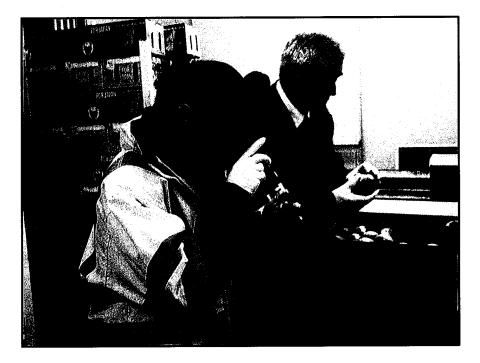
Whereas the previous shipments of Fuji apples were aimed at higher level domestic consumers this trial will look at dealing with a recognised supermarket chain that has less demanding quality requirements. It is hoped that aiming the fruit at this particular market segment will develop a more commercially realistic outcome. In collaboration with the supermarket they are also keen to try various apples to gauge consumer acceptance.

This project also provides an ideal opportunity to find a niche market for varieties such as Red Jonagold which have struggled commercially on the domestic market. Other varieties to be included in the trial are Royal Gala, Granny Smith, Golden Delicious (blushed), Red Delicious and Pink Lady TM.



Schedule of Events:

- June 2-5th Apples packed in various packhouses across Tasmania.
- June 6th Apples delivered to Hobart Coolstores to ensure correct temperature of fruit prior to fumigation.
- June10th Japanese MAFF officer arrives in Tasmania. Fumigation of apples undertaken.
- June 11th Apples inspected and loaded into 40' container.
- June 12th Apples trans-shipped from Tasmania to Melbourne to await export loading.
- June Apples loaded and depart Australia
- July 8th Apples arrive in Japan and clear customs.
- July 10th Apples go on sale through 55 Max-Valu stores.
- July 12th Tasmania Trade Mission delegation visit Max-Valu stores to view fruit.



Apple Specifications:

The original interest in pursuing the commercial trial was the fact that the supermarket chain involved in the negotiations were keen to discuss and come to agreement on specifications which enabled a viable commercial outcome for the grower and packhouse and also enabled and encouraged fruit to be directed into the Japanese market. In previous Japanese exports the rigorous quality specifications have deterred many growers and packhouses to pursue exports to this market. The quality specifications were heavily aligned to Australian Class 1 standards

Varieties:

6 different varieties of apples including Royal Gala, Red Delicious, Golden Delicious, Red Jonagold, Granny Smith and Pink Lady [™]. No consideration was given to trialing Red Fuji. Size:

Unlike previous shipments, and contrary to current sales, a conscientious decision was made to send smaller apples. The apple ranged in size from 60's through to 83's.

Specifications:

Fruit was packed to meet Class 1 Australian supermarket standards. This was perhaps less rigorous than previous quality specifications set for Tasmanian apples to Japan.

Packaging:

Fruit was packed in standard Australian 2 layer, 12kg apple cartons. Specifically designed artwork for the Japan protocol was used and the carton design allowed air flow through the carton for fumigation purposes.

Fumigation Research

The research conducted in Tasmania (see attached report) indicated that there could well be issues upon the fruit arriving in Japan with quality problems. Some of the varieties suffered some external fumigation whilst other varieties showed only internal fumigation damage.

Of the varieties tested fumigation damage of the skin was observed on Pink Lady TM and Golden Delicious with only Pink Lady TM expressed internal browning due to the fumigation process. The level of damage on the Golden Delicious was minor and could be easily graded out in Japan for commercially marketing of the fruit. The other varieties in the shipment, Royal Gala, Red Delicious, Red Jonagold and Granny Smith did not suffer from any detectable fumigation damage.

Although a percentage of fruit was not commercially viable the threshold of damaged fruit did not exceed commercial expectations and therefore no claims were made against the fruit. The damage fruit, particularly fruit with skin damage, was able to be used for public taste testing and therefore the fruit originally consigned as sample stock was able to used as sales fruit and the damaged fruit was utilised for consumer taste testing.

It is a possible consideration that fruit packed to a higher quality specifications would suffer less fumigation as it is well documented that skin blemishes, punctures etc will lead to exasperated skin damage through fumigation. Saying that, one of the promising aspects of the trial was the agreement to pack the fruit to a typical Australian Class 1 standard rather than an excessive standard which previous fruit sent to Japan had been packed to.

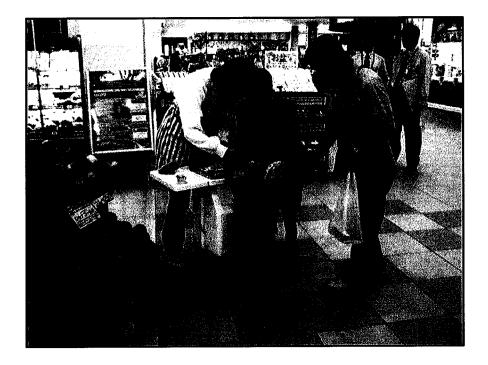
Promotional Activities:

The promotional of Tasmanian apples was very much a collaborative effort by both the supermarket involved and also the Tasmanian industry. The Tasmanian industry made available to the supermarket chain 55 soft toy Tasmanian Devils to give away as incentives for consumers to complete and return the consumer surveys. The toys were distributes throughout 55 supermarkets within the chain.

At the same time the arrival of the fruit coincided with the supermarket chains' "Australia Fair" promotion. The promotion was well publicized in media throughout the region and promoted not only Australian produce and wine but also had a strong focus on Tasmanian produce including honey, salmon, wine, soba noodles and other items.

At the same time the store featured images of Australia and Tasmania, including photos of producers including fruit, vegetable and salmon growers. Promotional brochures (sourced from Australian Tourism Bureau) of Australian sights were also available and clearly featured the unique environment of Australia including beaches, aquatic environments and outback regions. The displays within the store were visual and prominent. The visit of the delegation, including Minister Llewellyn, also created media interest with local television and print media.

Stores also promoted produce by having taste testing of product including apples, citrus, noodles and other products. The tastings allowed interaction with the consumers and further encouraged them to try the product and become more familiar with the product being offered.



Consumer taste-testing:

Fruit Growers Tasmania commissioned Max-Valu to undertake a consumer survey. The survey asked a series of questions in relation to physical attributes of the apples and consumers were asked to rate their answers as either excellent, good, average or poor. A summary of the results are:

- Q1. How would you rate the colour and appeal of the apples?
- A. 70% rated either excellent or good, 27.5% rated as average.
- Q2. How would you rate the flavour of the apples ?
- A. 65% rated either excellent or good, 32.5 % rated as average.
- Q3. How would you rate the crispness/crunch of the apples?
- A. 83.3% rated as either good or excellent, 15.8 % rated as average
- Q4. How would you rate the sweetness/juiciness of the apple?
- A. 73.4% rated either excellent or good, 25% rated as average
- Q5. How would you rate the price of the apples?
- A. 64.2% rated either excellent or good, 29.2% rated as average
- Q6. Would you purchase Tasmanian apples again?
- A. 95% answered YES they would purchase Tasmanian apples again.

Other General Questions:

What are the attributes of a good apple: Rating 1(40%) Crispness Rating 2 (35%) Sweet & juicy Rating 3 (13%) Honey core Rating 4 (12%) Balance of acidity and sweetness

What are the attributes of a bad apple:Rating 1(24%)SoftRating 2 (14%)Sour/acidRating 3 (8%)DryRating 4 (8%)Flavourless

Variety Preference for apples (general, not purely Tasmanian apples): (Only 60 consumers answered this optional question)

1. Royal Gala	2	3.3%	
2. Red Delicious	6	10.0%	No 3 (equal)
3. Pink Lady	1	1.7%	
4. Golden Delicious	9	15.0%	No 2
5. Granny Smith	5	8.3%	No 4 (equal)
6. Jonagold	4	6.7%	No 5
7. Fuji	17	28.3%	No 1
8. Orin	6	10.0%	No 3 (equal)
9. Kogyoku	5	8.3%	No 4 (equal)
10. Kokko	1	1.7%	
11. Mutsu	2	3.3%	
12. Shinano Sweet	1	1.7%	
13. Shinano Gold	1	1.7%	

Other Comments raised by the Customers

Praise

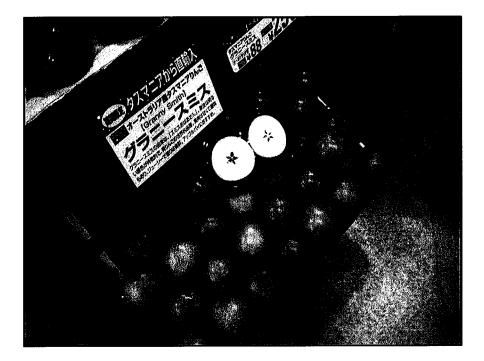
- It's firmer than the Japanese apples, but very tasty.
- Although I don't like apple generally, I enjoyed these apples.
- These apples were very cute & tasty like those in the story of "Snow White". Thank you.
- I love apples very much, so much so that I buy one apple a day and eat it every day.
- Australian apples taste like the Japanese apples in the old days, I like it. I may not feel like eating these days' Japanese apples any longer.
- Australian apples are tasty with sweetness with acidity, and finish afresh. These days' Japanese apples are lacking in something,,,
- These apples are cheaper and tastier than the Japanese apples. I don't like those Japanese apples that are rather dry.
- It was very tasty. I love Tasmania.
- The Tasmanian apples were very tasty.
- It was very tasty with rich flavour and crispness.
- I love apples. It had the same taste that I had in Tasmania.
- These Tasmanian apples were very tasty, thank you very much.
- It was very nice when I made it to compote.
- Rather small but with bright colour, they made the nice table decollation.

Complaints, Claims

- Red apples have been turned dark in colour, two of them were not eatable.
- It looked good, but when I peeled it was damaged and turned to brown coloured (a number of same comments were received).

Impressions and/or Requests

- I would love to eat more Tasmanian apples with skin-on, as they were grown under the safer standards than Japan.
- I appreciate that I can have apples in summer, but 88 yen per piece (250 yen for three) was slightly expensive. It would have been nice if they were a little bit cheaper.
- For the price, the size of apples seemed to be smaller.
- Every year, I have the Tasmania apples, I look for it.
- The price was too high for the size (a number of same comments were received.)



Summary

The commercial trial of apples to Japan was very successful and had numerous positive outcomes including:

- a) Japanese consumers are willing to try Tasmanian product and generally have very positive perceptions of Tasmanian fruit, even prior to purchase.
- b) Japanese consumers were willing to change their purchase behavior to buy smaller fruit and try different varieties of apples.
- c) A majority of Japanese consumer had a positive experience from trying Tasmanian apples and 95% of consumers are willing to purchase Tasmanian apples in the future. The supermarket believes this is a very strong basis to commence further planning for future shipments.
- d) Although the survey gave indicative results of consumers apple preferences the representation of responses was only small. Whilst initial thoughts were that Royal Gala would be a preferred variety this was not reflected in the survey. Granny Smith and Red Delicious (strong colours) polled very well which was surprising. Further work could potentially be done in the future looking at branding and promotion of apple varieties within the Japanese market.
- e) The industry now has a good understanding of Japanese consumer values and the emphasis they put on flavour, crispness and texture. This will assist in further developing customer specifications for the Japanese market.
- f) Although fumigation damage is still a concern there is room for commercial shipments of Tasmanian apples to Japan factoring in known % losses.
- g) The results of the fumigation research have shown that some varieties will be less attractive for export (i.e. golden delicious) but other varieties have good commercial potential, especially if some of the packing aspects in relation to skin blemishes are addressed.

Future Potential

The commercial potential for apples to Japan is very strong, even using methyl bromide fumigation. The strong consumer acceptance has also encouraged the industry to look at pursuing a non-fumigation protocol for apples into Japan.

The supermarket involved in the trial has already confirmed it wishes to import a minimum of a further 3 containers of apples into Japan next season. The publicity and exposure generated from the trial has also encouraged other supermarket chains and importers to commence enquiries into further commercial shipments next season.

Thanks:

Fruit Growers Tasmania would like to extend a thank you to the following parties for their involvement in a successful trial of Tasmanian apples to Japan:

- Tasmanian growers and packers including Reid Fruits, Hansen Orchards, Top-Qual Pty Ltd, B W Griggs, and Lucaston Park Orchards.
- Minister David Llewellyn, Tasmanian Minister for Primary Industries
- Tasmanian Department of Economic Development
- Max-Valu Supermarkets
- Victor Mitsutoshi, Create of Plan Agriculture
- Austrade in Japan
- Japan Pink Lady Association
- APAL
- Horticulture Australia Limited
- Scientific Horticulture, Dr Gordon Brown



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Report on fumigation damage of 6 apple cultivars destined for Japan Laboratory samples

Dr Gordon Brown

28 June 2008

Summary

In June of 2008 an experimental container of apples was fumigated and shipped to Japan. Fumigation followed the protocol for export of apples to Japan from Tasmania. This experimental shipment consisted of six cultivars of apples, none of which had been previously fumigated and shipped and only one, 'Jonagold', having been experimentally fumigated in previous research.

Of the varieties tested fumigation damage of the skin was observed on 'Cripps Pink' and 'Golden Delicious' with only 'Cripps Pink' expressed internal browning due to the fumigation process. The level of damage on the 'Golden Delicious' was minor and could be easily graded out in Japan for commercially marketing of the fruit. The other varieties in the shipment, 'Gala', 'Red Delicious' (forma Top Early), 'Jonagold' and 'Granny Smith' did not suffer from any detectable fumigation damage.

It should be noted that with the exception of 'Granny Smith' other issues were detected which limit the marketability of these fruit. For 'Gala' the external quality of the fruit was extremely poor. It is thought that the samples provided originated from the factory grade fruit bin and were not typical of the fruit packed for export. If this is the case then this variety should be marketed successfully. For the 'Red Delicious' and 'Jonagold' (also 'Golden Delicious') there was a high level of internal browning which may lead to marketing claims in 'Red Delicious' and will lead to marketing claims in 'Jonagold'. This internal browning was also present in the fruit samples that were not fumigated so this was a pre existing problem which should not be attributed to fumigation damage.

Method

The shipment consisted of ten pallets of 'Royal Gala', five pallets of 'Cripps Pink', two pallets of 'Red Delicious' (forma Top Early), two pallets of 'Golden Delicious', one pallet of 'Jonagold' and one pallet of 'Granny Smith'. These fruit were graded and packed by five different packhouses with the 'Cripps Pink' and 'Granny Smith' coming from the one packing line.

In addition to the completed pallets four boxes of each line of fruit were also supplied to the central fumigation facility. Two boxes of each line were fumigated alongside the fruit destined for Japan, on June 11, and the partner two boxes were left unfumigated. The assessment of these additional boxes form the basis for this report.

On June 12, following fumigation, fruit cooling, inspection and containerisation of the fruit to be exported, the additional boxes of fruit were collected from the fumigation facility and transported to Scientific Horticulture laboratories where they were stored at 0° C for 2 weeks prior to assessment on 26 and 27 of June.

Assessment consisted of an inspection of every fruit for skin damage. Particular attention was made on the appearance of fumigation scald or fumigation stain, as had been previously observed on 'Fuji' apples. The non fumigated fruit were assessed to ensure that any symptoms observed were a result of the fumigation process. After external inspection every fruit was cut in half and inspected for internal browning symptoms. As for external damage the non fumigated fruit were also assessed to ensure that any observed internal browning was due to the fumigation process.

Data from each tray was assessed individually allowing for 6 pseudo replicates, each with around 25 fruit, giving a total of 150 fruit per treatment per cultivar. Data was converted to % damage.

Results

External damage

	% Fumigation	Scald
Cultivar	Non fumigated	Fumigated
'Gala'	17.3	8.0
'Cripps Pink'	0	60.8
'Red Delicious' (Top Early)	. 0	2.1
'Golden Delicious'	0	17.5
'Jonagold	0	0
'Granny Smith'	0	0

Table 1. Level of skin damage resembling fumigation scald

'Gala'. Overall the fruit skin finish of the 'Gala' was extremely poor and it is hoped that these were processing grade fruit and not representative of the trial shipment. It was apparent that one box of fruit was even from a different line of fruit as these fruit had a shellac based wax applied to them. There were very few if any quality fruit in these

boxes, with bruises and skin punctures being common problems as well as alternaria spot, misshappen fruit and symptoms of green crinkle virus.

As fumigation causes any skin damage, such as skin punctures and bruising, to turn black this made assessing these fruit for fumigation damage on the skin extremely difficult reducing the resolution of this assessment. It can be observed in the data that even the non fumigated fruit appeared to have symptoms reminiscent of fumigation scald. Notable, however, is that the level of damage in the fumigated fruit was lower indicating that the damage observed was not due to the fumigation process. In addition to scald, this was the only cultivar where fumigation stain symptoms were observed, however, like scald this symptom was present on both the fumigated (10% of fruit) and non fumigated fruit (12% of fruit) suggesting the problem was not due to the fumigation treatment but was a pre existing condition.

'Cripps Pink'. Severe fumigation damage (figure 1) on the skin of the fruit was observed for this variety with more than 60% of fruit displaying symptoms. For many of these fruit, the symptoms were minor and it may still be marketable however, extra care will be needed when re-grading these fruit. Consideration should also be given to the extent of internal browning in this variety (see table 2) if re grading is performed.

'Golden Delicious'. Like 'Pink Lady' fumigation scald was observed on the 'Golden Delicious' fruit, however, the scald spots were not as abundant, were not large (figure 1) and the majority of these fruit would still be marketable with appropriate re-grading. In less severe cases the scald symptom is similar to russet flecks.

'Granny Smith', 'Jonagold' and 'Red Delicious'. No fumigation damage on the skin was observed for two of these varieties and the level of fumigation scald on the 'Red Delicious' was minor and not considered a major problem.

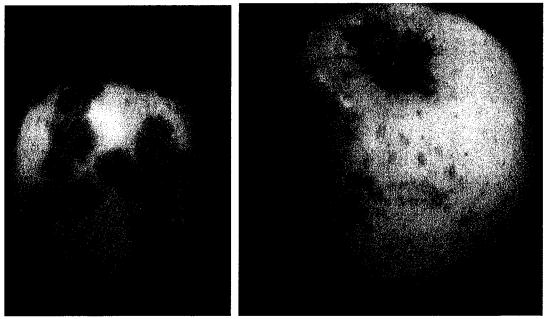


Figure 1. Fumigation scald damage to 'Cripps Pink' and 'Golden Delicious' apples

Internal damage

	% Internal	Browning
Cultivar	Non fumigated	Fumigated
'Gala'	0	0
'Cripps Pink'	0	13.3
'Red Delicious' (Top Early)	1.3*	2.8*
'Golden Delicious'	0.7*	2.7*
'Jonagold	8.0*	7.0*
'Granny Smith'	0	0

Table 2. Level of internal browning.

* suspected internal browning due to core rot development

'Gala' and 'Granny Smith'. For these two varieties, no internal browning due to either fumigation damage or other causes was observed in the sample. This indicates that the most successful variety in the shipment was 'Granny Smith' and if high quality 'Gala' were shipped (unlike the samples provided) then these too would be anticipated to be of high marketable quality.

'Golden Delicious' and 'Red Delicious'. The level of internal browning in these fruit, while being present, was minor and at a level that is usually marketed successfully, however, it should be pointed out that the level of internal browning measured in the funigated fruit was above the usual market specification for internal browning. The presence of this symptom in the non fumigated treatment suggests that this problem was not a direct result of the fumigation treatment and may have been due to some other condition, such as core rot, although the fumigation treatment may have aggravated the problem. Fumigation has the potential to reduce the fruit's vitality allowing for faster disease spread within the fruit. It should be noted that for 'Red Delicious', mouldy core (fungal growth within the seed cavity) was clearly evident in 28% of the fruit and it is known that mouldy core can escape the seed cavity and develop into core rot.

'*Jonagold*'. While internal browning that can be attributed to fumigation damage it was not observed in this variety, the level of internal browning was severe in both fumigated and non fumigated fruit. Unfortunately the extent of damage was often large (see figure 2) so claims would be expected if these fruit are marketed in their present condition.

'Cripps Pink'. In this variety a significant number of fruit suffered from internal browning due to the fumigation process. While the internal browning was often minor and probably not of marketing concern, there were enough fruit with severe internal browning to potentially cause marketing problems.



Figure 2. Internal browning (core rot) in Jonagold apples

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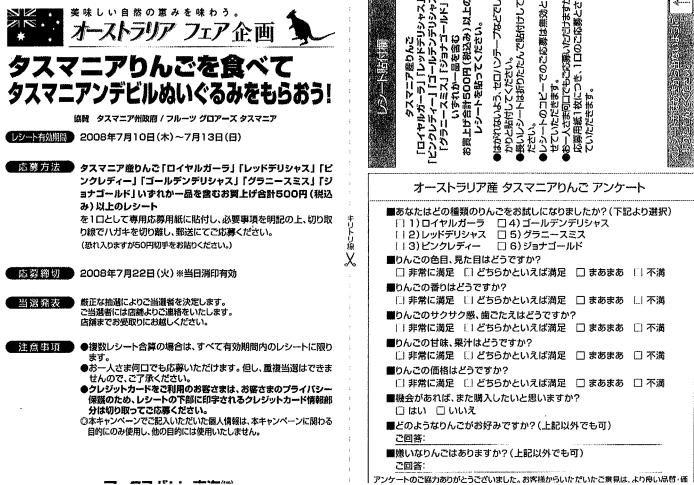
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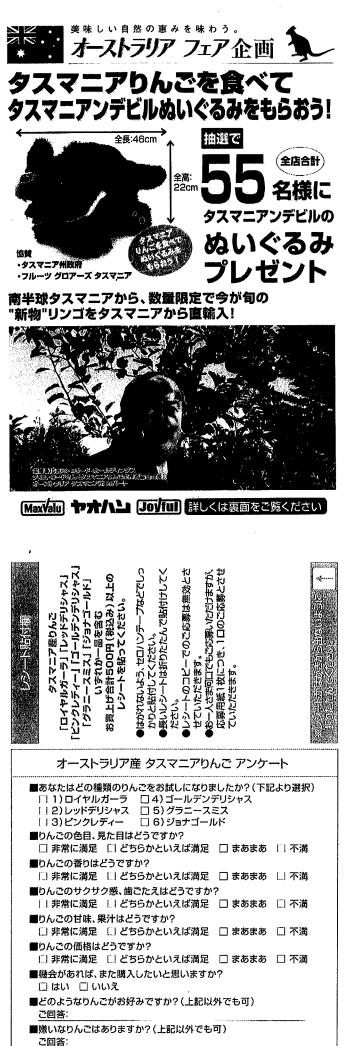
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広報室からのお知らせ



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7月12日(土)には、オーストラリアフェアの視察 とタスマニアン・デビル保護支援募金の協力要請のた め、タスマニア州政府と在名古屋オー

る、ラスマニア州政府と住名口座ス ストラリア領事館の関係者やりんごの 生産者さまの方々がマックスバリュ富 士南店を訪れました。

タスマニアン・デビル救済のため、 ぜひ皆さんも募金にご協力ください。

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この危機的状況を説明するルーウェリン第一次

産業・水資源大臣と内山社長。

まいます。

さい。 りんご、オージービーフ、みなみ まぐろ、そば、レザーウッドはちみ つなど、フェアで取り扱う商品の 展開状況をひとつひとつ確認され ました。

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2008年07月 オーストラリアフェア





