

## Final Report

# Apple and pear in-store quality and education program FY25

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Apple and pear in-store quality and education program FY25 (AP24001)

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## Public summary

The 2025 Apple and Pear In-Store Program was developed to help the industry better understand how apples and pears are presented and experienced by shoppers in major retail environments. While apples and pears are staples in many households, previous research has shown that issues such as empty shelves, visible defects, and inconsistent fruit handling can discourage purchases and reduce consumer confidence. This project set out to provide growers and industry with reliable, up-to-date insights to improve fruit quality at retail and strengthen demand.

Across 2025, the program involved regular visits to stores in multiple states. At each visit, field teams recorded how well-stocked apple and pear displays were, assessed fruit quality, and tracked common defects such as bruises, rots, and skin marks. Shopper surveys were conducted to understand what influences buying decisions, and store staff received practical training on fruit handling and merchandising. In addition, internal quality checks were performed to assess how fruit held up beyond its outward appearance.

The program confirmed that most stores kept good stock levels, though availability often dropped later in the day, highlighting the need for more consistent replenishment. Quality overall was solid, but slightly lower than in previous years, with bruises and rots emerging as important issues for improvement. Shopper surveys showed that freshness, appearance, and variety are the main drivers of purchase, rather than price alone. Store staff training was well received, with strong uptake of materials and digital resources.

These findings show that simple changes in retail execution — from better rotation and culling of fruit to more consistent replenishment — can reduce waste and increase sales. For growers and industry, the shopper insights reinforce the value of promoting apples and pears on their freshness and versatility, helping to keep the category strong in a competitive market.

As a result of the program, new benchmark data on availability, quality, and defects is now available, alongside fresh consumer insights and practical training resources for store staff. These outcomes provide the industry with clear direction on how to reduce fruit losses, improve the shopper experience, and grow demand for Australian apples and pears. Program results and resources are accessible through Hort Innovation, ensuring growers, retailers, and stakeholders can apply the learnings to deliver ongoing benefits across the category.

## Keywords

Apples, Pears, Availability, Quality, Defects, Audit, Education, Retailer Engagement, Shopper Survey.

## Introduction

The purpose of the 2025 Apple and Pear In-Store Quality and Education Program FY25 is to assist key retail partners in reducing apple and pear defective produce on show and boost best in class merchandising principles through hands on training and development.

The program scope involved a comprehensive field schedule bespoke to each retailer. For Drakes, Strikeforce visited 65 Drakes stores for a single initial visit and then chose 55 Drakes stores for recurring fortnightly calls across 10 visits. For ALDI, 150 ALDI stores were visited twice.

The activities conducted in store also differed by retailer. Drakes involved an in-store audit, store staff education, and consumer surveys in 10 stores. ALDI involved an in-store audit, and additionally an internal visual inspection on purchased apples and pears.

This report focuses on aggregated output derived from Drakes and ALDI as recorded and reported on a store-by-store basis by Strikeforce brand activators for AP24001.

In addition to reporting on 2025 outcomes, this report compares 2025 to similar programs conducted in 2023 and 2024.

## Methodology

### Elevating Apple & Pear Quality: A Data-Driven Approach to Store Staff Education

This program tackled the challenge of maintaining apple and pear quality in stores. We achieved this through a multi-pronged approach, combining monitoring, auditing, reporting, and targeted staff education.

**The objectives that Strikeforce measured the 2025 program against include the following:**

#### Focus Areas:

- Arrival Quality: Improved the condition of apples and pears upon arrival from the distribution centre, referencing industry quality standards.
- Shelf Quality: Enhanced the quality of apples and pears on display by educating store staff on best practices.
- Defect Identification: Trained staff to identify and categorise defective products.

#### Measuring Impact:

- Data-Driven Insights: Our Business Intelligence (BI) tool analysed data on product quality and defects. These insights were used to tailor staff education to address specific knowledge gaps in each store.

#### Customised Support & Reporting:

- Tailored Store Visits: Using Power BI reporting and data, bespoke visits were designed by our field team to address specific knowledge gaps identified in each store.
- Actionable Reports: Regular reports were provided to HIA, highlighting tangible outcomes, progress in closing knowledge gaps, and weekly updates showcasing improvements in in-store behaviour.

#### Continuous Improvement:

- Program Monitoring & Adjustments: continuous monitoring was conducted during the program and activities were adapted based on data and feedback, ensuring alignment with HIA.

#### Building a Quality Culture:

- Embedding Best Practices: Our goal was to cultivate a "quality-first" mindset within the retail environment, acknowledging staff turnover and experience variations.
- Raising the Knowledge Benchmark: We aimed to continually elevate the standard of best practice knowledge among retail staff.

#### Drakes consumer survey:

The final element in the in-store quality and education methodology for apples and pears is a consumer survey to ascertain the impact of the program on the end consumers purchase intent. The consumer survey was conducted within the Independents channel MSO Drakes. Strikeforce Category and Insights team determined that 10 selected stores provided a balance to the total store footprint whilst capturing meaningful insights across multiple States and demographics. The consumer survey was conducted at the beginning, middle and end of the program.

#### ALDI internal visual inspection:

In addition to the above in store quality and education program metrics, Strikeforce executed an internal visual inspection of apples and pears. Strikeforce merchandisers post in store audit purchased one of each varietal of loose and prepacked to take home for further inspection and reporting. The internal visual inspection methodology required merchandisers to cut open the fruit, take a photo of the cross section of the fruit, and report on findings within our CRM platform merx.

The in store quality and education program was conducted in the Independents channel MSO Drakes, whilst the internal visual inspection audit was conducted in ALDI.

**The activities that Strikeforce executed in 2025 to achieve the specified objectives are listed below. This includes:**

- Field Activation Schedule
- Briefing Materials
- In Store Staff Training Program

- Merchandiser Reporting
- Reporting Schedule
- Detail on our Project Reference Group members

### **Field Activation Schedule**

Strikeforce visited 150 Aldi stores twice to audit the apple and pear section and conduct an internal visual inspection. In addition, Drakes executed the apple and pear in store quality and education program with 65 stores being visited initially, and 55 stores on a fortnightly basis for 10 visits. A consumer survey was also conducted in 10 stores for 6 visits at the beginning, middle and end of the program.

### **Briefing Material**

Detailed briefing materials Strikeforce developed in conjunction with HIA and provided to staff/stores included:

- Training video – A short training video that included: An overview of the storage and stock management, defect identification and merchandising best practice standards.
- Briefing documentation – Storage and stock management, defect identification and merchandising best practice standards.
- Training scripts - Through our briefing documentation, we included robust scripts to ensure we delivered a consistent in-store message through the training sessions.
- Leave behind – based on our experience on previous programs Strikeforce collaboratively built with HIA a “leave behind” that features a QR code system that works effectively and provided store staff easy access to training materials.

### **In Store Staff Training Program**

The following is how we educated and trained the store produce team to build capability related to Best Practice Merchandising Principles, therefore, improving consumer shoppability and basket spend. Below is broken down into a timeframe:

- 1 min - Introduction to store staff, advising them of the purpose of our visit.
- 2 mins – Shared with the store staff our educational training video on Apples and Pears.
- 5 mins – The practical component of our visit where we evaluated the fresh produce Apples and Pears section and discussed best merchandising principles including but not limited to: Stock Management, defect identification and merchandising standards.
- 2 min – Working with the store discussing tailored feedback based on the findings and suggestions of the visit on how the staff member can improve the Apples and Pear section.
- 5 min – Store staff to scan QR code to the online training materials.
- 2 min – A question and answer session conducted with the store staff.

### **Merchandiser reporting**

Through our learnings and HIA objectives, we created a bespoke audit conducted by the team every week. Our Business Intelligence tool delivered trend analysis and live data upon each field visit.

### **Reporting Schedule**

Below are key reporting measures and services that Strikeforce delivered to HIA through our Client Services team:

- Fortnightly reporting: Extensive live reports embedded with insights and also extracted and shared as a summary.
- End Of Campaign (EOC) reporting: An EOC final report was completed and attached to the Delivery Partner portal in the prescribed format.

## Results and discussion

The results are provided as a separate attachment for the End of Campaign (EOC) report.

Below outlines the key outcomes from the program:

The 2025 Apple & Pear In-Store Program (AP24001) delivered comprehensive insights into fruit availability, quality, and defects across participating retailers Drakes and ALDI, supported by tailored activities including staff education, shopper surveys, and internal audits.

### Availability

- Overall, availability (>¾ full displays) in 2025 was broadly in line with 2023/24 benchmarks, though full displays were ~3% lower.
- Drakes led performance with 90% of visits >¾ full and 67% full displays, while ALDI underperformed with 75% >¾ full and only 46% full displays.
- By section: Apples were on par with prior years, while pears outperformed historic benchmarks on >¾ full displays (+5%).

### Quality

- Combined program quality scored lower than historic averages, with a 4% decline for apples (84% vs 88%) and an 8% decline for pears (76% vs 84%).
- Between retailers, ALDI reported slightly higher good quality than Drakes (84% vs 81%), though ALDI had a higher share of poor-quality fruit (>5 defects visible).
- Market Buy SKUs in both retailers (value-based offers) influenced outcomes, with inherently lower quality scores.

### Defects

- Scars / Sunburn / Hail Marks remained the most common defect across both fruit types (35% apples, 43% pears), though lower than in previous programs due to lighter hail impact in the 2025 crop.
- Bruises were consistent across apples and pears (~21–22%) and remain a key consumer deterrent.
- Cuts were less prevalent in 2025 (7–12% vs prior 16–18%), but rots increased (Apples 12% vs prior 8%), raising concern given its progressive nature.
- Defect variance: Drakes saw more rots (13%), ALDI more cuts (22%) and bruises (24%).

### Retailer Activities

- Drakes: Added staff education (92% displaying materials, 95% using QR training resources) and shopper surveys (apples 60% intent to purchase, pears 37%).
- ALDI: Conducted internal quality inspections, confirming that bruising and rots were key underlying issues even when fruit appeared sound externally.

### Overall Outcomes

- Drakes demonstrated strong availability leadership but opportunities in quality and defect reduction (especially rots).

- ALDI showed stronger internal quality potential through prepacked lines but underperformed on shelf availability and external presentation.
- The program validated that consistent retailer engagement (visits, training, audits) drives availability and supports quality improvements, but progressive defects and pear category perceptions remain key challenges for the industry.

## Outputs

**Table 1. Output summary**

Output	Description	Detail
Quality Audits Survey	Store-level information populated during each call.	Merx data – provided in EOC report and available in Power BI. Good Quality Score percentage, and >3/4 Availability Measure.
Retailer Education	Number of Store Staff attended training, leave beehinds provided, and QR codes accessed.	Merx data – provided in EOC report and available in Power BI.
Shopper Survey	Store-level information populated during each call.	Merx data – provided in EOC report and available in Power BI.

## Recommendations

Below outlines key recommendations from the program:

### Availability & Replenishment

- Replicate Drakes' success in consistent replenishment across ALDI to reduce low-stock displays (<½ full).
- Drive focus on underperforming varietals (e.g., Jazz apples, William pears) to bring them in line with stronger performers.
- Standardise morning-to-afternoon replenishment cycles to avoid late-day availability declines.

### Quality & Defect Management

- Establish defect-reduction action plans targeting rots and bruises, which represent the biggest consumer risk.
- Leverage prepacked lines, which consistently outperformed loose fruit, especially in ALDI, to reduce handling-related defects.
- Reinforce staff training on rotation and culling practices to manage progressive defects before they impact sales.

### Shopper Engagement & Conversion

- For apples: Emphasise freshness cues (shine, colour, clean presentation) as these drive purchase over price.
- For pears: Overcome “don't need / don't like” perceptions with recipe inspiration, cross-merchandising (cheese, salads, desserts), and nutrition messaging.

- Trial different pack sizes (smaller packs for convenience shoppers, larger for families) to lift basket weight.

#### **Staff Capability & Education**

- Extend Drakes' successful education model across both retailers: short, repeated training cycles, leave-behind materials, and digital QR content.
- Appoint "freshness champions" in stores to regularly check sections and embed accountability.

#### **Industry & Program Learnings**

- Expand post-purchase consumer research to validate if in-home quality perceptions align with at-shelf impressions.
- Monitor the impact of Market Buy SKUs to balance consumer expectations of value vs quality.
- Maintain benchmarking (vs 2023/24 data) to track progress on defects, particularly rots and bruises, over future programs.

#### **Intellectual property**

No project IP or commercialisation to report