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London

# Creating A Market for Quality, Higher Value Fresh Produce in Brazil

Dr. David Hughes

Emeritus Professor of Food Marketing

FC Brazil Convention

Espaco APAS, Alto de Lapa

São Paulo, Brazil

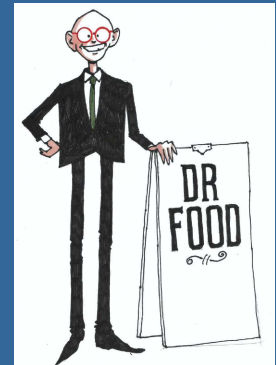
Thursday, August 18<sup>th</sup>, 2016



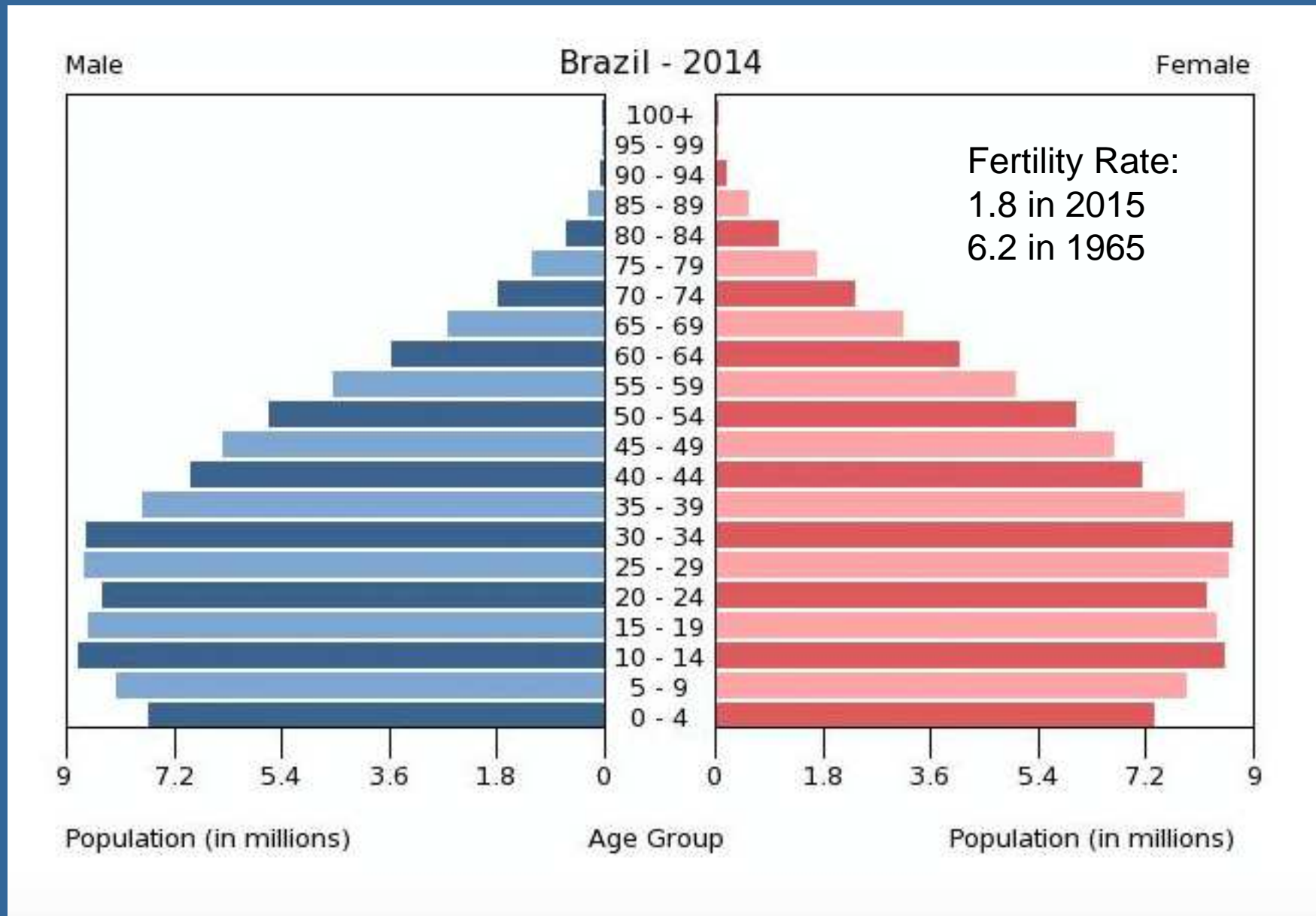
@profdavidhughes

[www.supermarketsinyourpocket.com](http://www.supermarketsinyourpocket.com)

[www.drfood.ca](http://www.drfood.ca)

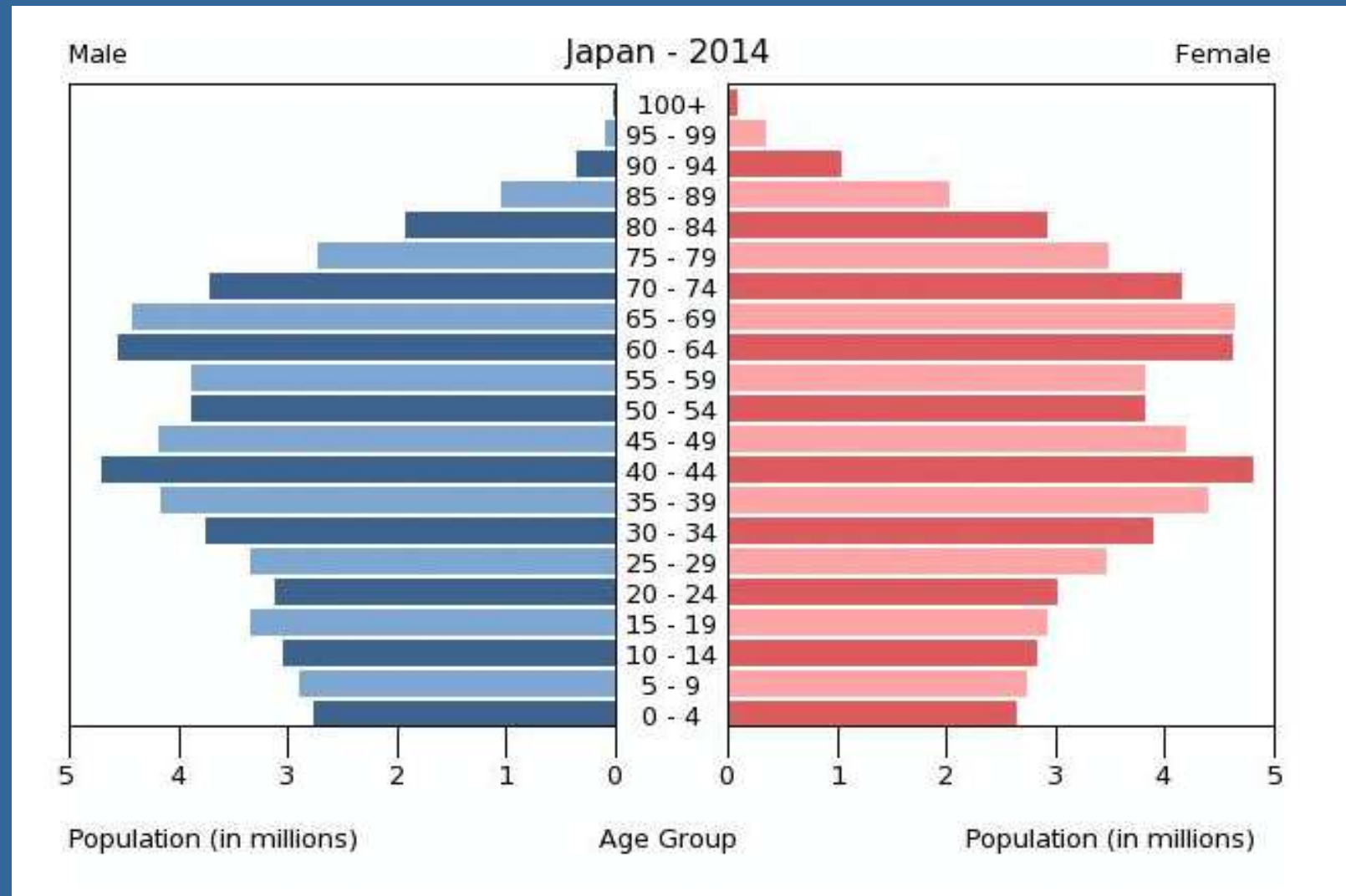


# Demographic Profile for Brazil: Population Growth Rate Declining for 50 Years



**But Population Increasing by 2 million Per Year!**

# Demographic Profile of the Japan – A Country Shrinking By 1 Million People per Year!



Source : UN. 2015 \* Population 2016 126 million



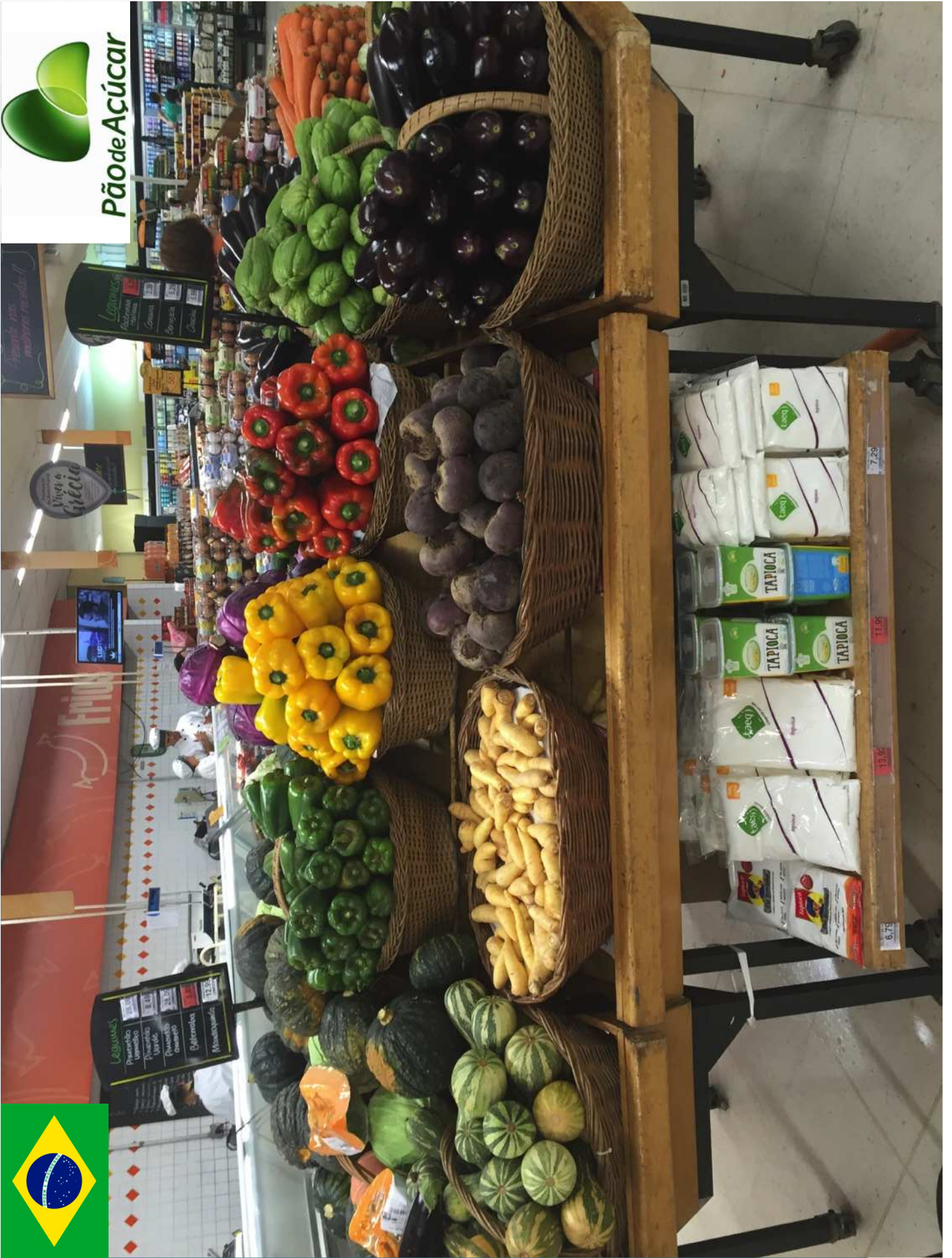


# Folhagens

**mambo**  
Prayer em servir







Pão de Açúcar

Legumes

Pimentão Amarelo	1,15
Pimentão Verde	1,15
Pimentão Vermelho	1,15
Abóbora	1,15
Alface	1,15
Brócolis	1,15
Chuchu	1,15
Ervilha	1,15
Feijão	1,15
Grão-de-bico	1,15
Lentilha	1,15
Mandioca	1,15
Massalinha	1,15

Frutas e Vegetais



7,20

11,90

13,90

6,75





Pão de Açúcar





# Who's the Most Profitable in Global Grocery Top 50?\*

<i>Company</i>	<i>EBIT Margin (% of sales)</i>	<i>Grocery Sales *billion</i>
Reynolds America	65	10.1
Altria Group	47	18.8
BAT	44	20.0
Philip Morris Int.	40	26.8
SAB Miller	33	16.5
AB InBev	32	43.6
Diageo	31	16.5
Mondelez	30	29.6
Johnson & Johnson	28	13.5
Reckitt Benckiser	25	13.6
Japan Tobacco	25	17.9
Coca-Cola Co	22	44.3
Pernod Ricard	19	9.5
L'Oréal	18	28.0

Source: OC & C (UK), 2016

\*based on 2015 (or nearest) financial data

## Who's the Least Profitable in Global Grocery Top 50?\*

<i>Company</i>	<i>EBIT Margin (% of sales)</i>	<i>Grocery Sales *billion</i>
Carlsberg	-0.3	9.7
Dean Foods	1.2	8.1
Kirin Breweries	1.8	15.2
Con Agra	2.1	15.8
Bunge	3.0	28.1
ADM	3.7	25.2
Nippon Meat Packers	3.8	10.0
Arla Foods	3.9	10.0
Royal Friesland Campina	5.2	10.0
Tyson Foods	5.3	41.4
JBS	5.6	47.9
Suntory	5.7	19.8
Tingyi	5.9	9.0
Asahi Breweries	6.2	4.1

Source: OC & C (UK), 2016

\*based on 2015 (or nearest) financial data



# Proprietary Technology and Demand Chain Squeeze

**Life Science Companies  
Ownership of Intellectual  
Property & Genetic Rights**

*market  
power  
polarised*

*nursery people  
growers/farmers  
distributors  
manufacturers etc.  
get squeezed!*

**Major Global Food Retailers and Food Service Firms  
Ownership of Information on Shopping Behaviour**

# Consolidation of International Agri-Supply Companies: From “Big 5” to “Gigantic 4”?!

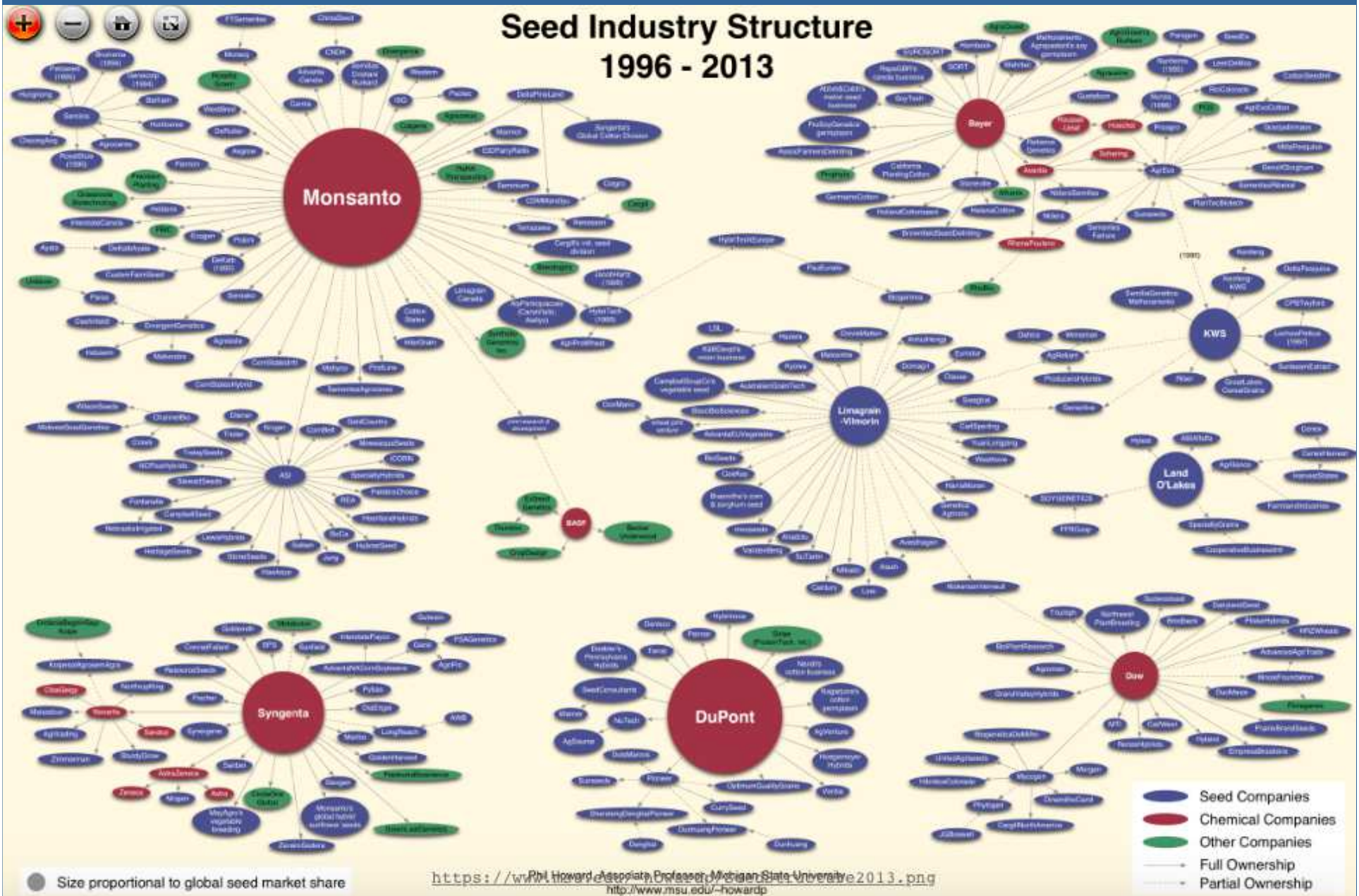


Over past 20 years, the “Big 6” have purchased 200 + companies plus patents with increasing power in the “Smart Farming” market. Du Pont and Dow agree merger. Syngenta goes Chinese. Bayer to buy Monsanto? Their financial results reflect this concentration!





# Seed Industry Structure 1996 - 2013



Source: <https://msu.edu/~howardpseedindustry.html>

# Which of These Produce Items Have the Strongest CONSUMER Brands?





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SALADA ATELIÊ MASSARELA BU FALA  
RS 16,90 UN1

SALADA ATELIÊ FRANGO  
RS 16,90 UN1



COGUM SHIMEJI BCO FAZ SAO JOSE 200g  
RS 7,69 UN1

COG CHAMP GOURMET FAZ SAO JOSE 200g  
RS 8,90 UN1



**Strong Brands or Pretty Packaging?**



# Branding: A Definition

“The art of aligning what you want people and particularly your customers to think about your company and its products with what they actually think about you”

## Attributes of Great Brands

1. target distinct market segments – can be more than one with a range of products
2. have a clear and relevant point of difference
3. have emotional level connections
4. understand shopper and consumer needs and wants
5. Have long-lasting connections with customers

# Global Trends for Innovation “SIAL World Trends Tour”, 2014

## Common Attributes of Successfully-Launched Food Products

- tasty/”more-ish”
- convenience (buying, preparing/eating/cleaning up)
- health, nutrition and well-being “hooks”
- local (provenance, producer link)
- values – environment, sustainability, animal welfare
- natural, minimally processed, clean & clear ingredient list
- “magical” foods (so-called “super foods” – e.g. blueberries & antioxidants, fish & omega-3 oils)
- premium: luxury/indulgence but affordable
- good for cooking (or, at least, assembly) at home
- and vital to have a snacking product format



Source: Oliver Dauvers (retail consultant) and Hughes, 2014



**What's the Demographic Scene Like in Some Higher Income "Western" Countries?  
And What are the Implications for the Food & Grocery Industry?**



### \* Percent Meals Eaten By

Single diners	42
2 diners	36
3 diners	11
4 or more diners	11



### \* Preparation Meal Time

2015	32 mins
1990	45 mins
1980	60 mins
1950	90 mins

### \* Willingness to Pay More for Food

5% more

For healthy

22% more

For better taste

Considerably more

For ready made meal solution!





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*Prazer em servir*

Not Designed for  
1 or 2 Person  
Households!

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# Increasing Complexity Driving Food Purchasing Behaviour



Including:

- savvy shopping
- local/national
  - place of production
  - care of local economy
  - local is fresh/healthier
- provenance
- heritage
- sustainability
- animal welfare
- worker welfare



# MEET THE PRODUCERS

Experts from around Britain who help us bring 100s of fresh ideas to your table

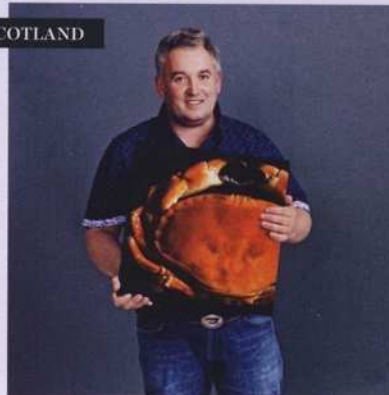


ENGLAND



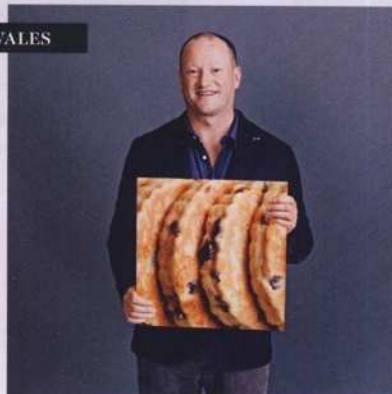
STRAWBERRIES | MARION REGAN  
*Awarded an MBE for her services to the fruit industry*

SCOTLAND



ORKNEY CRAB | RONNIE NORQUOY  
*Fishing for 40 years and helping us source sustainable crab from the wild Atlantic seas*

WALES



WELSH CAKES | ROBIN JONES  
*All our Welsh cakes are hand-turned in the bakery*

IRELAND



POTATOES | MICHAEL MCKILLOP  
*Plants new varieties every season in nutrient-rich soil for delicious potatoes full of goodness*

## How'd You Like Your Fruit? With ADJETIVOS, Please!:

- hand/freshly-picked ....
- locally-grown....
- new season ...
- Caqui from Itatiba ....
- Jazz/Pink Lady/Zespri
- heritage variety ....
- Farmer Gabriel ....
- guaranteed BRIX levels ..
- organic .....
- environmentally-friendly ...
- free from (pesticide residues)
- premium (e.g. jumbo-sized)
- ready for snacking .....



Grown on a Family Farm: with 300 Hectares of Asparagus!



- BRITISH FREE RANGE -



# PEMBROKESHIRE CORN FED CHICKEN MINI FILLETS

REARED BY THE SCALE FAMILY IN THE PEMBROKESHIRE  
COAST NATIONAL PARK. BIRDS ARE FED A CORN BASED  
DIET AND ARE FREE TO ROAM AND FORAGE ON CLOVER  
PASTURE RICH IN WILD FLOWERS AND HERBS.

SKINLESS  
FRESH CLASS A

EXPERTLY SOURCED FOR  
MARKS & SPENCER



best of  
British

Origin :UK



0 1001766 405191

USE BY

20/05/2016

WEIGHT

0.297

PRICE/Kg

£ 17.49

PACK PRICE

£5.19

READY TO COOK

KEEP REFRIGERATED 0°C to +4°C

MARKS &  
SPENCER

Using ADJETIVOS  
to Earn a Price of  
R\$75 for Chicken!

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# The cost of Food Fraud

The brands of Retailers, Food Service and Restaurants are reliant on all suppliers sharing the same level of integrity as the person whose brand and reputation is at stake.





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Prazer em servir



PREÇO POR KG  
5,39



PREÇO POR KG  
42,85



PREÇO POR KG  
4,99

PREÇO POR KG  
5,99

PREÇO POR KG  
7,79





Strong Growth in Blender Sales Drives Growth in Fresh & Frozen Fruit Markets in Many Higher Income Countries:

Brings benefits to fruits and vegetables, particularly those with “super food” status!







A More Contemporary Way of Consuming Fruit & Veg















*Eat 'em like junk food" works well for any snacking produce*

*Campbell's*



Cold-Pressed Fruit & Vegetable Juices:  
Strong Growth Potential with Excellent  
Health & well-Being Hooks



Campbell Soup Splashes into Cold-Pressed Juice  
with "1915 by Bolthouse Farms"



Cold-Pressed  
Redolent of  
EVOO

Any Room for a  
Super Ingredient  
Like Onion Juice?





# Campbell Soup to buy salsa maker Garden Fresh for \$231 million



Campbell's Acquisition Strategy  
Puts Fresh Produce Industry  
Directly in the Competitive  
Firing Line!



## Connecting the Trends:

- Healthy and Nutritious
- Convenient
- Minimally Processed
- All Natural Ingredients
- Product with Provenance
- Artisan Not “Big Food”

**Asda offers juice in fruit & veg aisle  
in B.Fresh deal**







£2.50

# 5 OF 5 A DAY FRUIT & VEGETABLE PLATTER

 5 of 5 a day

Energy	Fat	Saturated Fat	Sugars	Salt
446kJ 106kcal	1.29g	0g	19.2g	0.1g
6%	2%	0%	21%	2%

Use By **01 APR**  
SC3660 L1 11:20  
Keep refrigerated



## Targeting the Kids' Lunch Box Market (examples from New Zealand)







Meal Deals Hugely Influential in the UK Lunch Time Market. \$5-7 for a salad, snack & drink. GREAT VALUE!





# Spiralizing: The Transformation of Traditional Vegetables





# Meet the Original Cauliflower Crumbles™

Years in development, the patent-pending Cauliflower Crumbles™ process ensures the ultimate in freshness and convenience to the consumer.



The process—which covers harvesting, processing and our proprietary packaging—yields a product with excellent shelf life, consistent color and appearance, and no waste!

No prep  
No mess  
No clean up

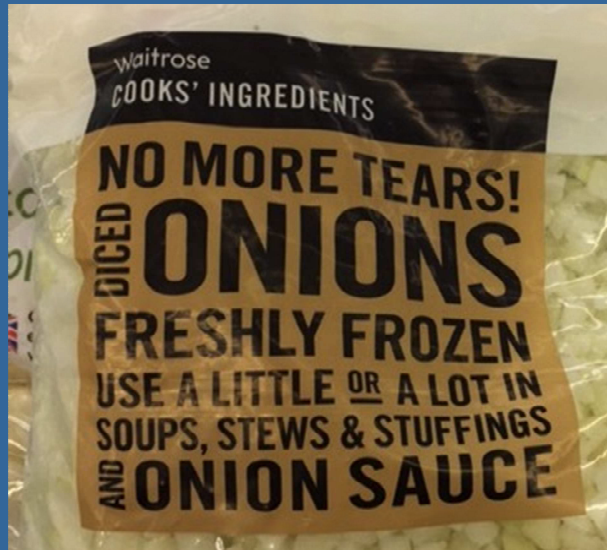


Contact us today for more info: 831.751.3800 • [GreenGiantFresh.com](http://GreenGiantFresh.com)

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# Waitrose



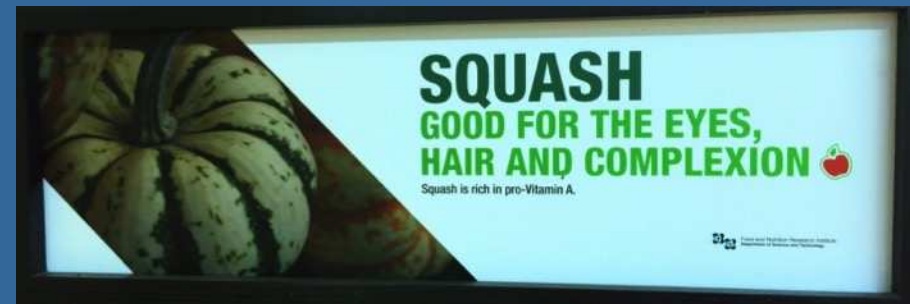
Fresh and Frozen Prepared Onion Products





Point-of-Sale Material in Major Supermarket in Manila.

Is it legal? Dunno – it's effective!





Beetroot Having an Athletic Moment!

Like Cranberries, the “Social grapevine” Drives Awareness of Product Benefit for beetroot [*beterraba*] (i.e. Quick Recovery from Athletic Exertion)



# Don't Be Shy About The Attributes of Your Product!

IMPORTED AND MARKETED BY ZESPRI  
 CHORLEY ROAD, WASHINGTON, NEW ZEALAND  
 Product of New Zealand  
 www.zespri.co.nz

I taste great and have **2X** more fibre than pineapples!

Tastes sweeter when fruit is slightly soft or ripe. Store at room temperature for better ripening.

Just cut & scoop

**Zespri®**  
**Green**  
 tangy sweet!

**RICH IN VITAMIN C** **2X** **4X**  
 FIBRE of PINEAPPLES<sup>1</sup> NUTRITION of GRAPES<sup>2</sup>

Serving size: 2 Medium Kiwifruit (200g)  
 Servings per container: varies

AMOUNT PER SERVING		
Vitamin C	170.2mg	183.7%
Dietary Fibre	6.0g	24.0%
Folate	26.4µg	66.0%
Potassium	602.0mg	120.4%
Vitamin E	1.22mg	8.5%
Calcium	84.0mg	5.4%

1. Fibre Content (g/100g)  
 United Kingdom: 2012  
 New Zealand: 2012 (Table 25)  
 2. Zealand FOODfiles 2012, Version 01

9 415835 801608

I am refreshingly sweet and have **3X** more Vitamin C than oranges!

Tastes sweeter when fruit is slightly soft or ripe. Store at room temperature for better ripening.

Just cut & scoop

**Zespri®**  
**SunGold**  
 juicy sweet!

**SOURCE OF FIBRE** **10X** **3X**  
 NUTRITION of APPLES<sup>1</sup> VITAMIN of ORANGES<sup>2</sup>



**Ingredients:  
Brown Onions**



**Clean and Clear  
Ingredients:  
Mega-Trend in the World of  
Food Manufacturing.  
Huge Opportunity for  
Produce**

<b>Nutrition Facts</b>	
Serving Size 160 g	
Amount Per Serving	
Calories 64	Calories from Fat 1
% Daily Value*	
Total Fat 0g	0%
Saturated Fat 0g	0%
Trans Fat	
Cholesterol 0mg	0%
Sodium 6mg	0%
Total Carbohydrate 15g	5%
Dietary Fiber 3g	11%
Sugars 7g	
Protein 2g	
Vitamin A 0%	Vitamin C 20%
Calcium 4%	Iron 2%

\*Percent Daily Values are based on a 2,000 calorie diet. Your daily values may be higher or lower depending on your calorie needs.

NutritionData.com

**Talk About Onion  
Health Benefits More!:**

- colon cancer
- stomach cancer
- esophageal cancer
- sleep & mood
- skin and hair





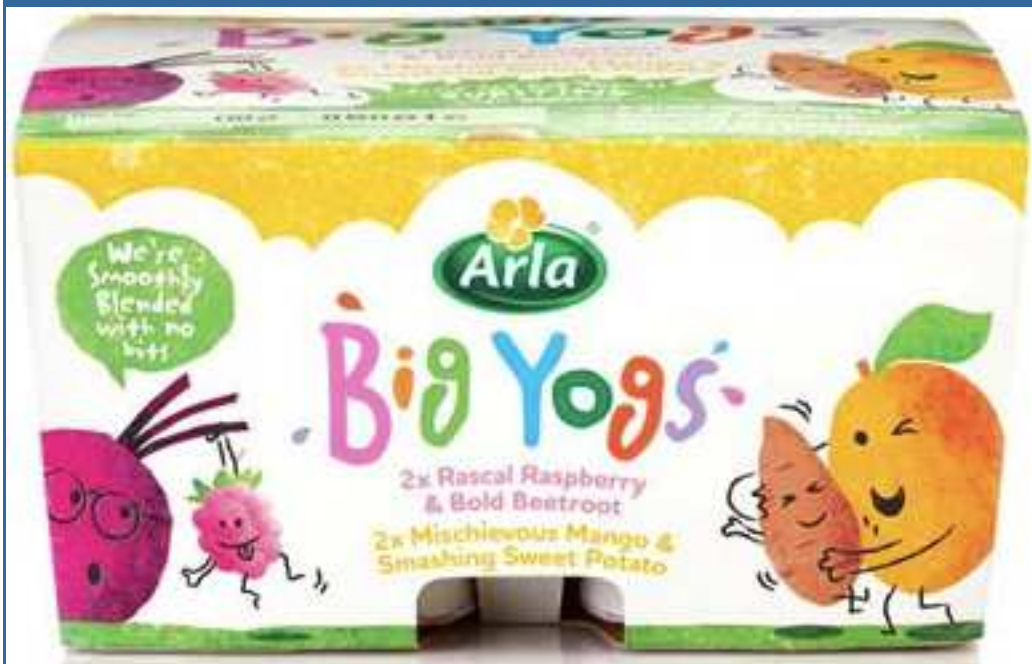
# Move over Seafood, Sushi Has Another Key Ingredient - Fresh Fruit



“Frushi On-Trend”

Frushi has been popular in the US since last year and now the food fashion is gaining traction in the UK as well as trending on social media sites like Instagram and Pinterest.

New Format and New Segments for Vegetables: e.g. Ice Cream, Adult Snacks, “Stealth” Vegies for Kids





# China-based Alibaba stakes claim as passing Wal-Mart to be the world's largest retailer - Market Cap Alibaba x3 Walmart



\* Estimated; Source: Zero Hedge



## Aldi/Lidl UK: Altering the Competitive Landscape for Fresh Produce

**Super 6**  
Fruit and veg offers



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GIANT

Ahold  
USA

MARTIN'S

Peapod



Retailers Rush to Smaller Store, Affordable Premium Strong Fresh Offer (365 Whole Foods lookalike?)



# KROGER'S MAIN & VINE: firmly in Whole Foods Market Territory



**AT MAIN & VINE, YOU'LL ENJOY**

- Fresh, affordable local produce and meat
- A wide selection of local beer and wine
- Unique culinary experiences and taste adventures, with tasty meals made fresh in our kitchen
- And so much more!

Our home is your home ... and we can't wait to welcome you in!







CLIP, SCAN, SAVE!  
WITH MOBILE COUPONS



# It's **Healthy Living** for less!

**HEALTHY COMMUNITIES**  
Neighborhood Grants

Learn More & Apply



- MOBILE COUPONS
- WEEKLY SPECIALS
- FIND A STORE
- GRANT PROGRAM
- MEALS AND CATERING





# How shrinking baskets and demand for grab-and-go food are upending the grocery business



The produce section of the redesigned Michael-Angelo's in Markham, Ont.





# WHOLE FOODS TO OPEN CHAIN FOR MILLENNIALS

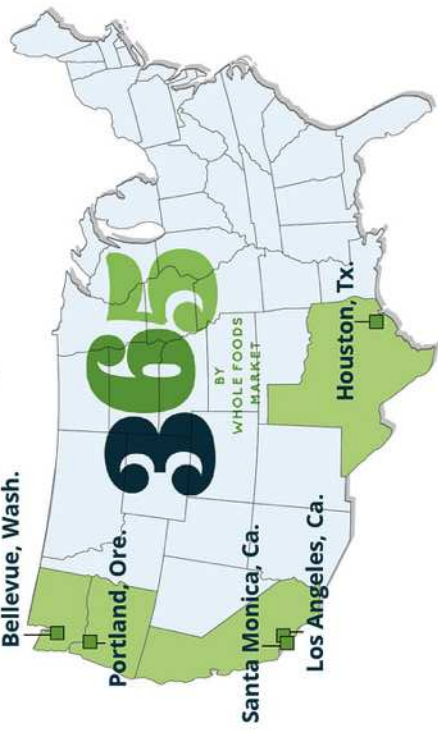


## About 365

The things you need + where you are + how you want to shop: 365 by Whole Foods Market hits the scene in 2016.

Soon, you'll be able to shop for grocery staples, fresh produce, prepared foods and more-365 days a year. It's a new convenient and affordable way to get the good stuff you crave, all with the same quality standards you find today in our Whole Foods Market stores.

5 cities getting cheaper version of Whole Foods



Source: Whole Foods

**Abel & Cole**

**A healthy & happy  
way to eat**

**We bring boxes of organic  
brilliance to your door**



## Hop on board for an ethical food adventure



### **Choose a box**

Returnable, recyclable packaging that'll stay chilled till you get home



### **Make it perfect**

Swap in and out what you fancy



### **We deliver**

On the same day each week via eco routes

[Find your delivery day](#)





# RetailWeek

CONNECTING RETAIL

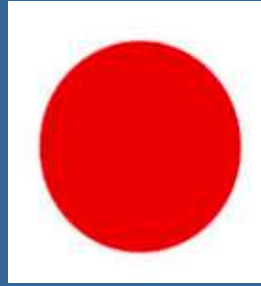
June 17, 2016 £7.99



## Amazon throws down the gauntlet in grocery



# Monks Delivered Via Amazon as Role of Japanese Temples Fade





# FRESH INGREDIENTS AND DELICIOUS RECIPES DELIVERED TO YOUR DOOR. SIMPLE. HEALTHY. DELICIOUS.



## MY FAMILY FOODBAG

Family favourites that'll please the fussiest eaters. Quick, healthy and yummy recipes for you and your little ones.

**5 recipes every week**  
**5 meals for 2 adults and 2 to 3 children**  
Auckland, Hamilton & Wellington

**\$159**.00  
Per week  
Free Delivery

## MY CLASSIC FOODBAG

Classic recipes with a twist. Ideal for busy families with older kids who want healthy food and delicious recipes.

**5 recipes every week**  
**5 meals for 4 adults or a family of 5**  
Auckland, Hamilton & Wellington

**\$189**.00  
Per week  
Free Delivery

## MY GOURMET FOODBAG

Premium produce and inspiring recipes. Ideal for couples who love fresh food and enjoy exotic flavours.

**4 recipes every week**  
**4 meals for 2 adults**  
Auckland, Hamilton & Wellington

**\$139**.00  
Per week  
Free Delivery



# Grocers explore options to defend against growing meal kit category



Opportunity for Fresh produce Industry and Threat for Traditional Food Retailers



# Self-driving robots deliver food to your door after founders of Skype launch new tech company

Continued Growth of On-Line Shopping is Unsustainable Without Radical Developments in Home Delivery Options (not the death of “white van man” but his end is nigh!).



Domino's Australia has developed a prototype model for a self-driving robot that can deliver hot food and cold drinks right to your door. Credit: Domino's



Walmart taps Uber, Lyft for same-day grocery deliveries

# Backwards to the future



Mr. Barnes Wouldn't Have Been Surprised!







## Local favorites, delivered in an instant

UberEATS delivers the best of New York right when you want it. Our curated menus feature dishes from the local spots you love. And the ones you've always wanted to try. It's the same cashless payment as an Uber ride. So just tap the app, meet your driver outside, and enjoy.



Wednesday, Feb 3



## MIGHTY QUINN'S

### Brisket Sandwich with Burnt End Baked Beans

★ Featured on the Food Network's Best.  
BBQ. Ever

Slow smoked beef brisket, sliced on a brioche roll with Mighty Quinn's housemade bbq sauce and a side of burnt end baked beans. Served with slaw, pickled cucumbers and chiles.

**\$12.75**

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London

# Major Retail Players Expanding Multi-Format Presence: Implications for Fresh Produce – Does My Product Format Fit with the Retail Format?



	Hypermarkets	Convenience and proximity	Atacarejo	Discount	Online
Walmart	Established	Developing	Established	Established	Established
Cencosud	Established	Developing	Established	No stores	Developing
Grupo Éxito	Established	Developing	Established	Developing	Developing
Carrefour	Established	Developing	Established	No stores	Developing
Key	Established	Developing	No stores		

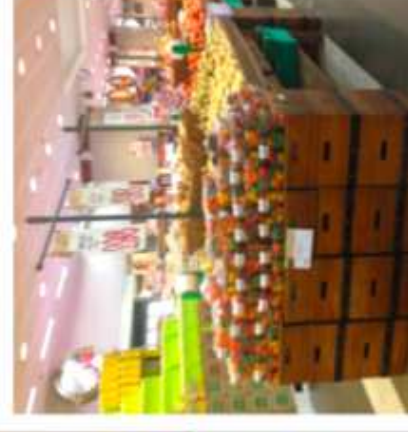




## produce section

Many retailers use basket-style displays to elevate the status of their produce. But, in a high impact and varied section, Zaffari does it better than most.

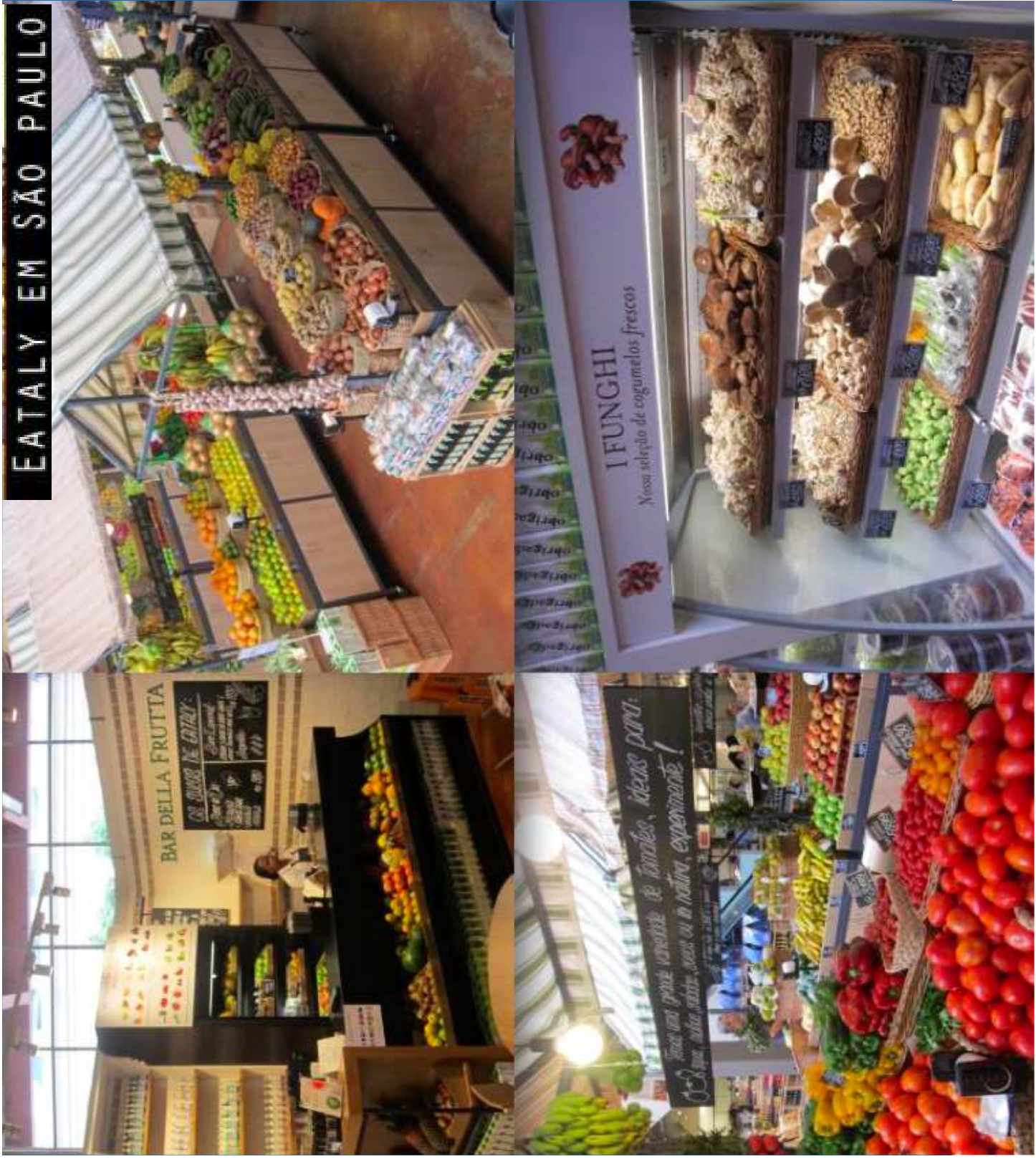
A diverse and intriguing range helps make the produce section a highlight for shoppers, giving a true market-style feel to this section of the store.







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EATALY EM SÃO PAULO

I FUNGHI

Nossa seleção de cogumelos frescos

BAR DELLA FRUTTA

OS DOGOS DE EATALY

Fazem uma grande variedade de tomates, ideais para:  
Salada, molho, salsas, assados ou in natura. Experimente!



## In Many Retail Markets, Tough Period for Produce

- across Europe, per capita consumption of vegetables static or declining (households buying less)
- deflation eroding fresh produce retail value – UK market down US\$1+ billion in 2015 versus 2014
- hard discounters expanding super low price fresh offers to compete with “traditional” supermarkets
- fresh cut expanding but values under pressure
- “difficult-to-prepare” traditional produce struggles and commodity Fruit & Veg. firmly under price pressure
- Very few fresh produce brands (in the UK & other markets) but the few over-perform their category

\* fresh processed F&V mixes bring great opportunity

# Some Thoughts to Ponder on Produce

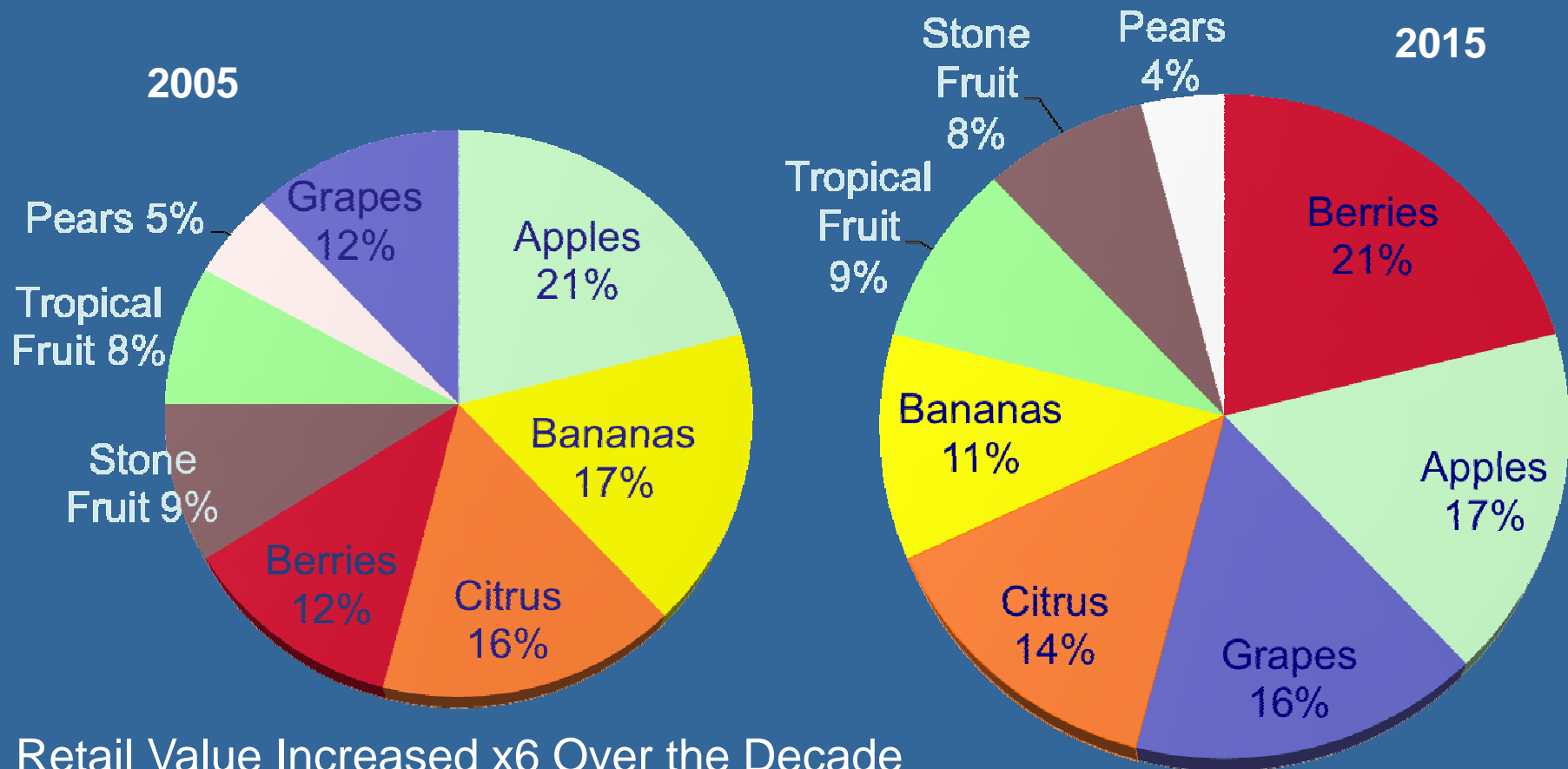
- ferociously competitive over next few years, partic. for traditional whole fruit and vegetables
- fewer, larger, better-resourced commodity businesses (“last man standing” spectre) and nimble, value-added, fresh food firms with (branded) consumer products
- inexorable trend towards more convenience attracting international food processors (e.g. McCain, Simplot)
- much improved retail category management with more info. on how to use and who produced it and how
- produce with adjectives, stories, points of difference
- each category should consistently communicate the specific health & well-being benefits of their produce



# Value Share of the UK Retail Fruit Bowl 2005-2015

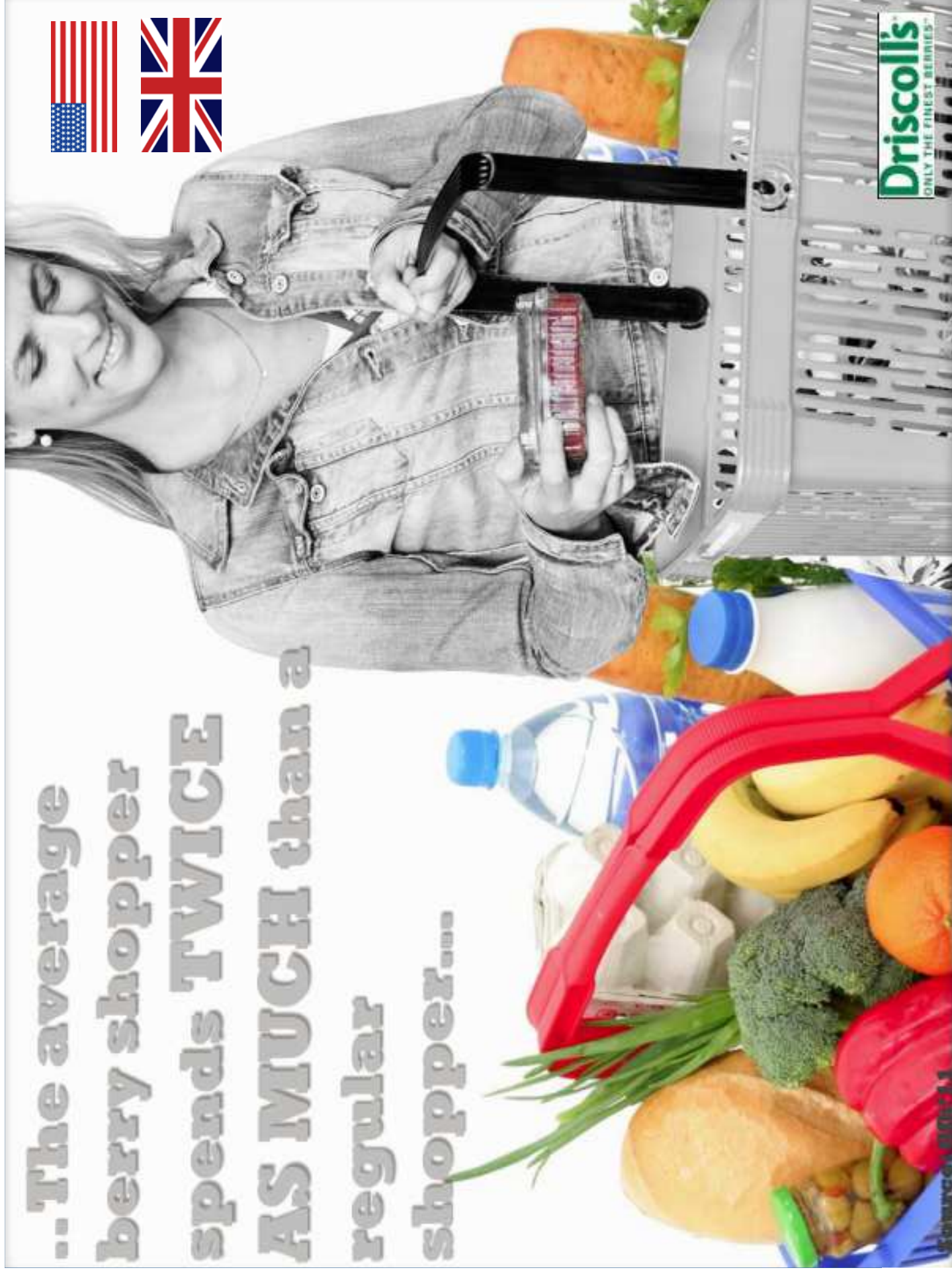
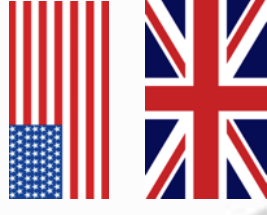
## Outstanding Success for Fresh Berries Over a Decade.

### Not All Produce Are Equal!



Retail Value Increased x6 Over the Decade  
 Now, RSV US\$1.5+ billion per year & still growing!

**..The average  
berry shopper  
spends TWICE  
AS MUCH than a  
regular  
shopper....**



**Driscoll's**  
ONLY THE FINEST BERRIES™



**... Berry buyers spend  
more on wine,  
flowers and other  
luxury goods...**



**Driscoll's**  
ONLY THE FINEST BERRIES™



Driscoll Varieties Dominate Premium Berry Range but Sold Under Retail Brand





# Driscoll's "Berry Patch": Retailers Provide Hectares of Shelf Space!



Typical Kroger SW Display with Dual Cases





**AMBOISE**  
CATEGORIE 1  
ORIGINE HOLLANDE  
LA BARQUETTE DE 125G

**1€95**

**MYRTILLE, MÛRE,  
GROSEILLE**  
CATEGORIE 1  
ORIGINE HOLLANDE / BELGIQUE  
LA BARQUETTE DE 125G

**1€95**

**CERISE**  
CATEGORIE 1  
ORIGINE BELGIQUE  
LA BARQUETTE DE 300G

**3€95**

**FRAISE  
DRISCOLL**  
CATEGORIE 1  
ORIGINE BELGIQUE  
LA BARQUETTE DE 150G

**6€95**

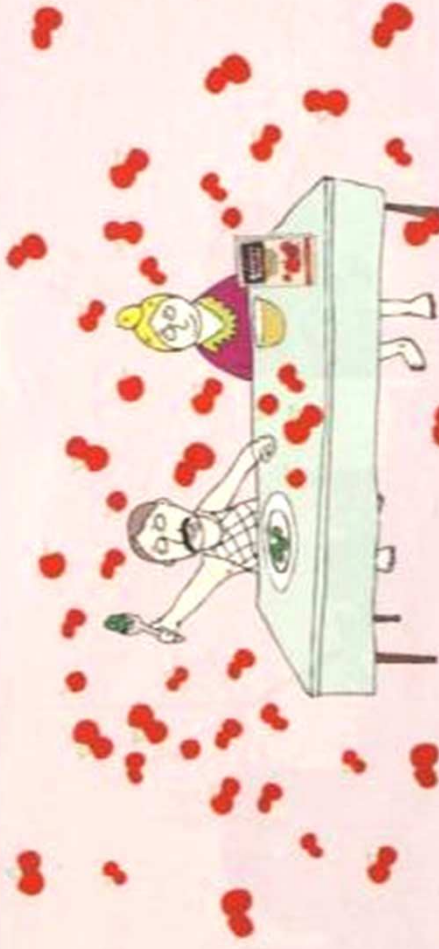
**CHARENTA  
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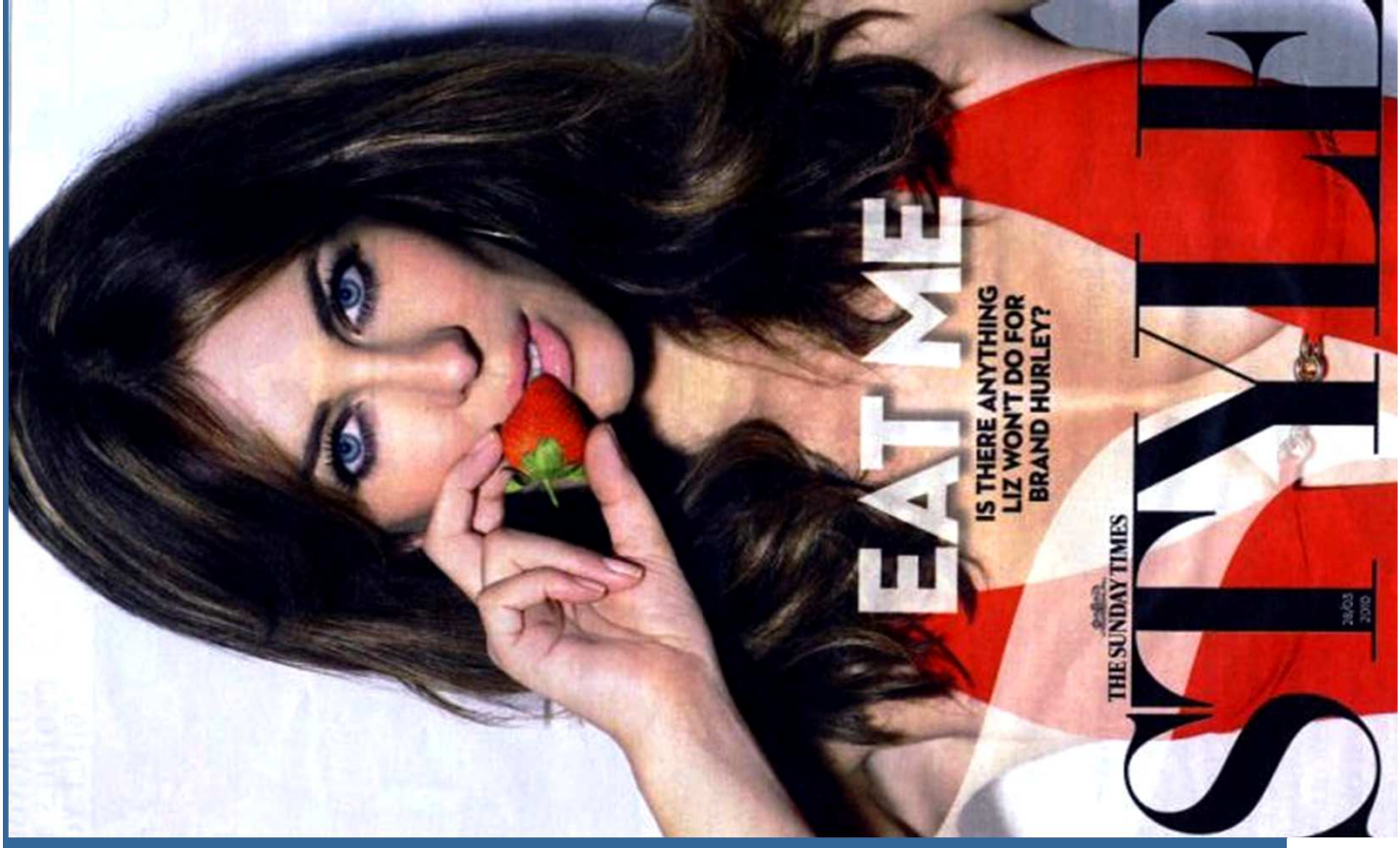
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# Waitrose Kitchen

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## Berry heaven

When fruit, frosting and sponge meet for triple-decker pleasure

**HOLIDAY COOKING**  
The best recipes to take with you

HOW TO EAT FOR A HEALTHY HEART

**PHILLIP SCHOFIELD**  
'My perfect wine for paella'

Luscious berry cake with marshmallow frosting (page 54)

MARCUS WAREING'S SATURDAY NIGHT  
ELIZABETH DAVID'S CLASSIC NICOISE  
JASON ATHERTON'S MIDNIGHT FEAST

editor's letter/july 2014

**WELCOME...**

If I knew I'm going to be able to cook on holiday, I prepare in a way some people think is unacceptable. Armed with a nalgai, I also don't page from some of my favourite cookbooks - which usually includes marinating works by the likes of Ottolenghi and The River Cafe. I can then slip the recipes neatly into my suitcase and not have to lug any weighty tomes alongside trunk, suitcase and flipper.

But faced with stifling expectations to my standard, this month I have found a new solution. If you're wondering which dishes you might make on holiday, we've selected a few of the best and repeated them here (from page 60) - including a keto from the late great Elizabeth David and Robert Carter, as well as Claudia Roden, Sam and Sam Clark and Rick Stein. And they're joined with other lovely recipes from this issue, such as Martin Winberg's seasonal steaks on page 41 and the beautifully simple berry puddings (steak on the farm) on page 11. It could be made from a kitchi shayyara and sun cream - all you need to pack. Happy holidays!

William

William Wood editor, Waitrose Kitchen, waitrosekitchen@waitrose.co.uk

## Berried treasure

Jazz up summer puddings with a cascade of berries

**WE ♥ YOGURT**

Plain yogurt is a fridge staple - perfect with granola, in soups, stews, curries or salad dressings, or with summer berries for an instant pud. We love Duchy Originals From Waitrose Organic Thick & Creamy Natural Yogurt (£1.49/500g); Yeo Valley Organic Natural Yogurt (£1.50/500g); and this luscious new Straight Up from The Collective Dairy (£2.39/500g).



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BELGIAN DARK CHOCOLATE

WHOLEGRAIN BROWN RICE & CHOCOLATE. THAT'S IT! AND WITH 55 CALORIES YOUR JEANS WILL STILL FIT...

*My Greek Style Yogurt*

I LOVE making my Organic Greek Style Natural Yogurt. The gorgeous ORGANIC THICK & CREAMY Natural Yogurt I source locally makes this recipe so special. It gives it a lovely mild tang, yet LUSCIOUSLY THICK texture - DELICIOUS spread over some fruit and granola.

Rachel

Rachel's organic fat free GREEK STYLE natural

Rachel's MY NAME. MY PASSION.



July "Waitrose" magazine dripping with fresh berry images (6 pages)

college





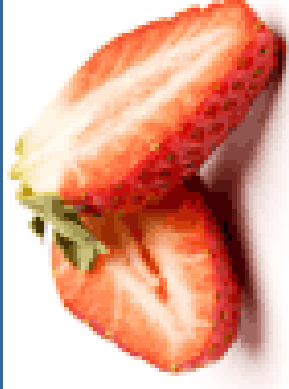
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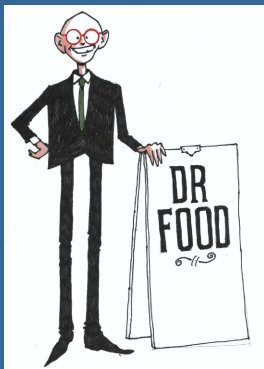
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