



East Meets West: Bridging the Cultures with Innovative Food Solutions

Dr. Sharon Shoemaker + Dr. Karen Lapsley, Moderators





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Refreshment Sponsor





East Meets West: Bridging the Cultures with Innovative Food/Almond Solutions

Presenters:

Dr. Roger Clemens, USC School of
Pharmacy

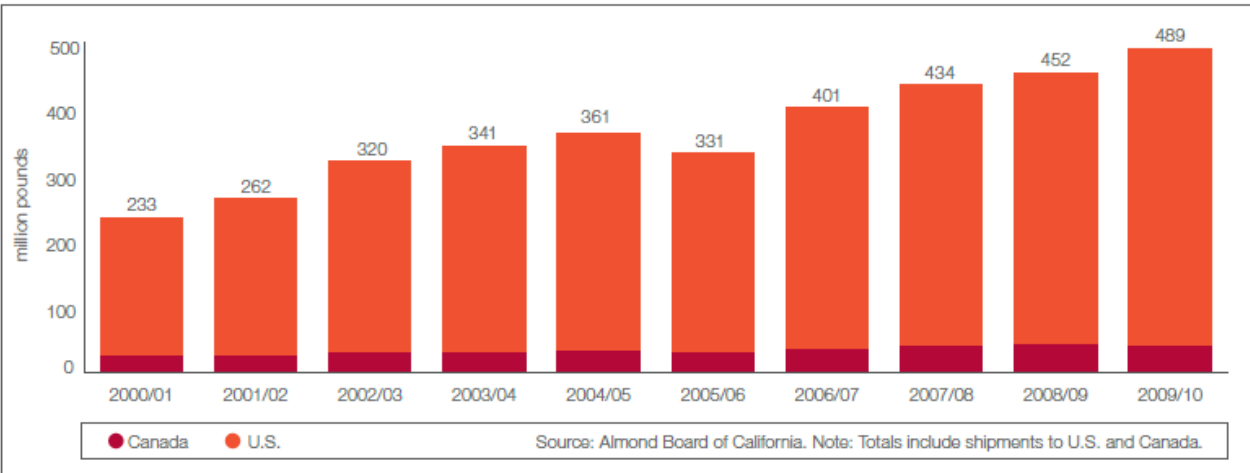
Lawrence Allen, Senior China
business expert and author of
*Chocolate Fortunes: The Battle for the
Hears, Minds and Wallets of China's
Consumers*

Dr. Sharon Shoemaker, UC Davis



USA market highlights

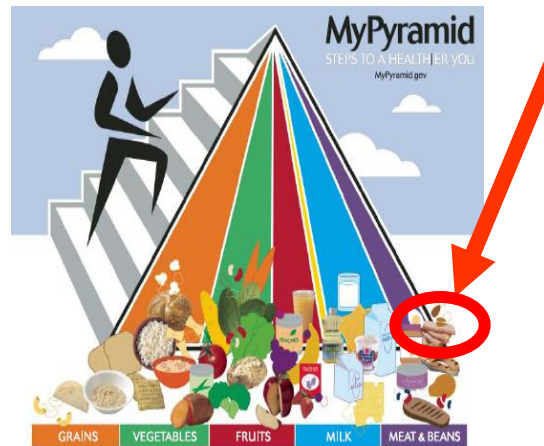
NORTH AMERICAN ALMOND SHIPMENTS CROP YEAR 2000/01-2009/10



A handful of your heart's desire. Make it a smoothie. Blend into your smoothie. Or use the heart's desire, and share it with California almonds. Come to the world of almond nut on the go and eat smart. By following your heart you're eating on wheels and on wheels. Learn more about the power of a handful at almond.com.



2003: FDA Nut Health Claim
↓ Total Cholesterol and LDL



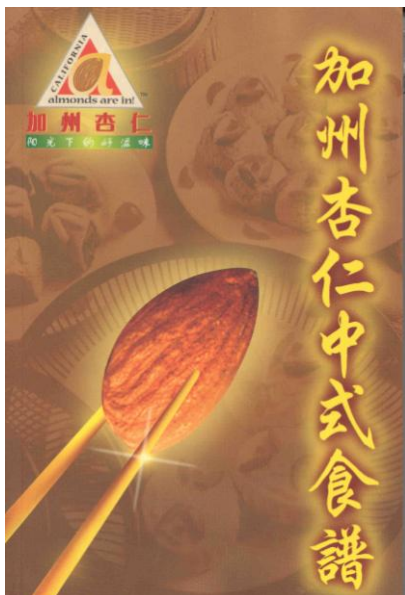
2005: Almonds Added to
USDA MyPyramid



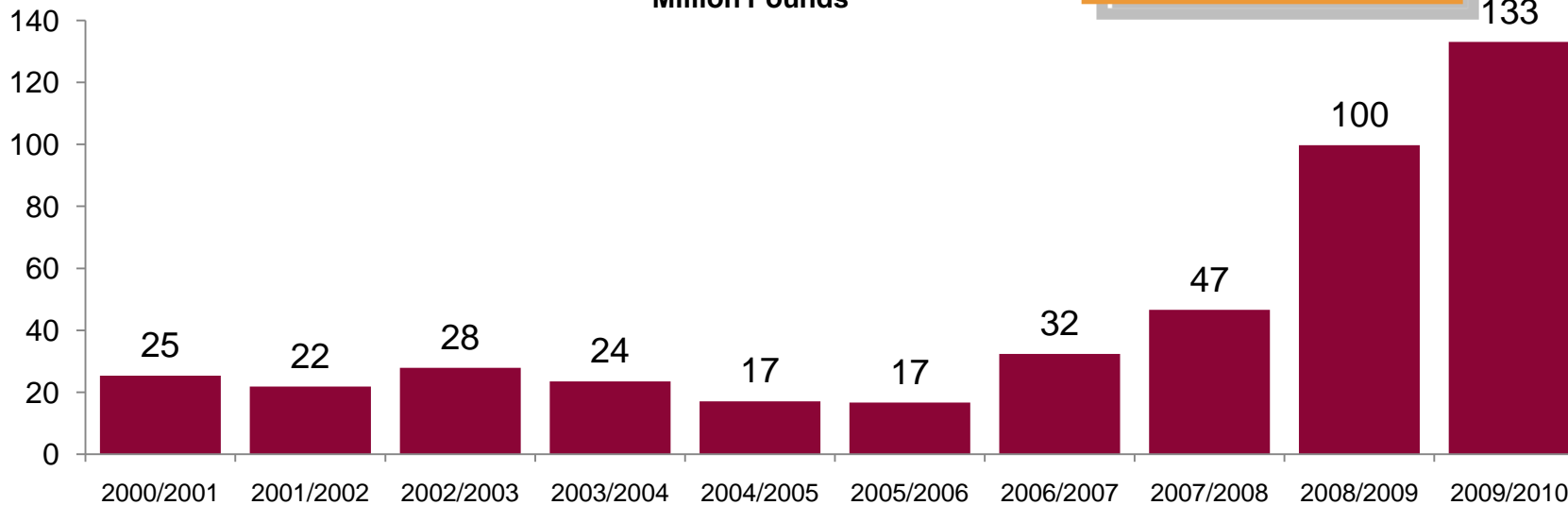
Portion Control Tin First
Suggested by Subject in
ABC Study



China market highlights



China 10 Years
Million Pounds





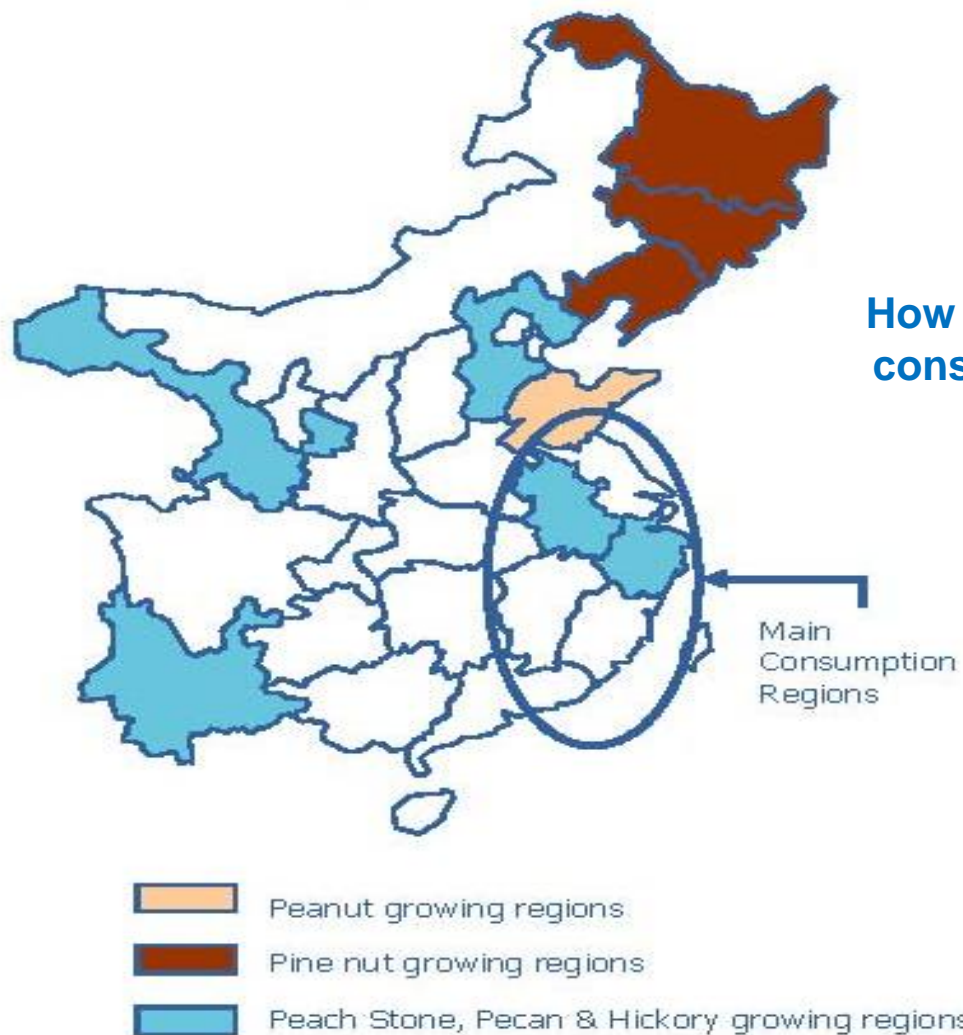
China - growing economic sectors

Industries in which China ranks #1 or #2 in the global market context

| | China Percentage of Global Market | China Market Rank in Global Market |
|---------------------------------|-----------------------------------|------------------------------------|
| Automotive | ~20% | No. 1 |
| Machine Tool | 22% | No. 1 |
| Domestic Appliance & Components | ~20-30% | No. 1 |
| Semi-conductor | ~30% | No. 1 |
| Elevator | ~40% | No. 1 |
| Construction | ~12% | No. 2 |
| Food Retail | ~10% | No. 2 |



China - nut growing regions historical perspective



How will both nut processing and consumption expand throughout China 2010-2020????



China - Snack Category Growth

Category Scale



Category Maturity

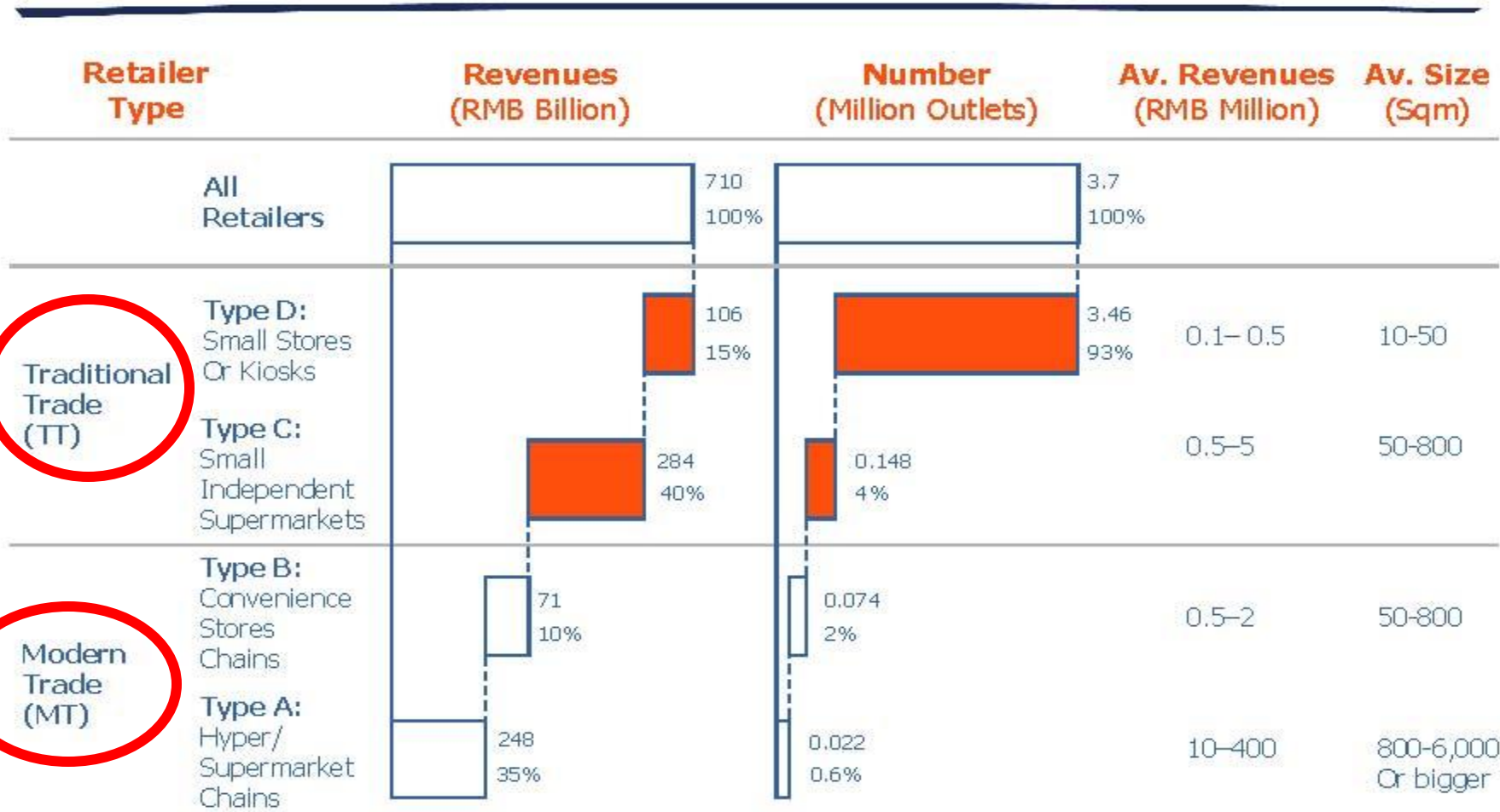




China – snack distribution is evolving

Distribution: a major challenge

'Traditional Trade' accounts for > 50% of retail revenues





onto the speakers!!



Food Industry Priorities in the USA and China

Dr. Roger Clemens, USC School of Pharmacy





Objectives

- Assess and compare food science & technology education between USA and China
- Discuss the food science-related challenges to entering the China market
- Identify USA-China partnership opportunities in academe and food industry



IFT Membership

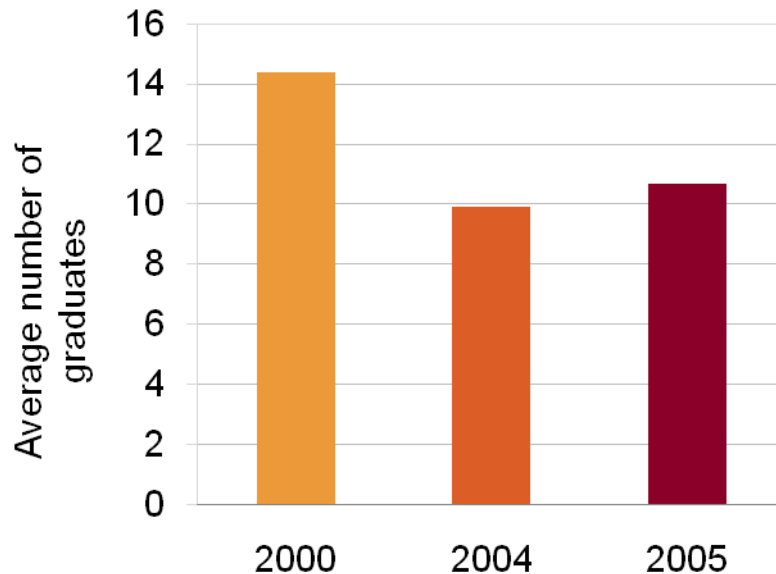
- Founded in **1939**
- More than **18,000** members worldwide
- **18%** of IFT members are international in more than **100** countries
- **59** Sections and Sub-Sections, **28** Divisions
- Members come from industry (**81%**), academia (**15%**), and government (**4%**)



IFT on Higher Education

- **47 undergraduate food science programs**
 - 41 USA
 - 5 Canada
 - 1 Mexico

B.S. Degrees (1990-2005)





Education

| Field of Highest Degree (%)* | |
|------------------------------|----|
| Food Science/Technology | 47 |
| Agriculture | 11 |
| Business/Marketing | 8 |
| Chemistry | 6 |
| Biological Sciences | 5 |
| Nutrition | 4 |
| Microbiology | 3 |
| Chemical Engineering | 2 |
| Food Engineering | 2 |

| Highest Degree | | |
|----------------|-----------|---------|
| Degree | Women (%) | Men (%) |
| Bachelor's | 44 | 34 |
| Master's | 31 | 23 |
| Doctorate | 17 | 32 |
| MBA | 4 | 8 |
| None/other | 4 | 4 |

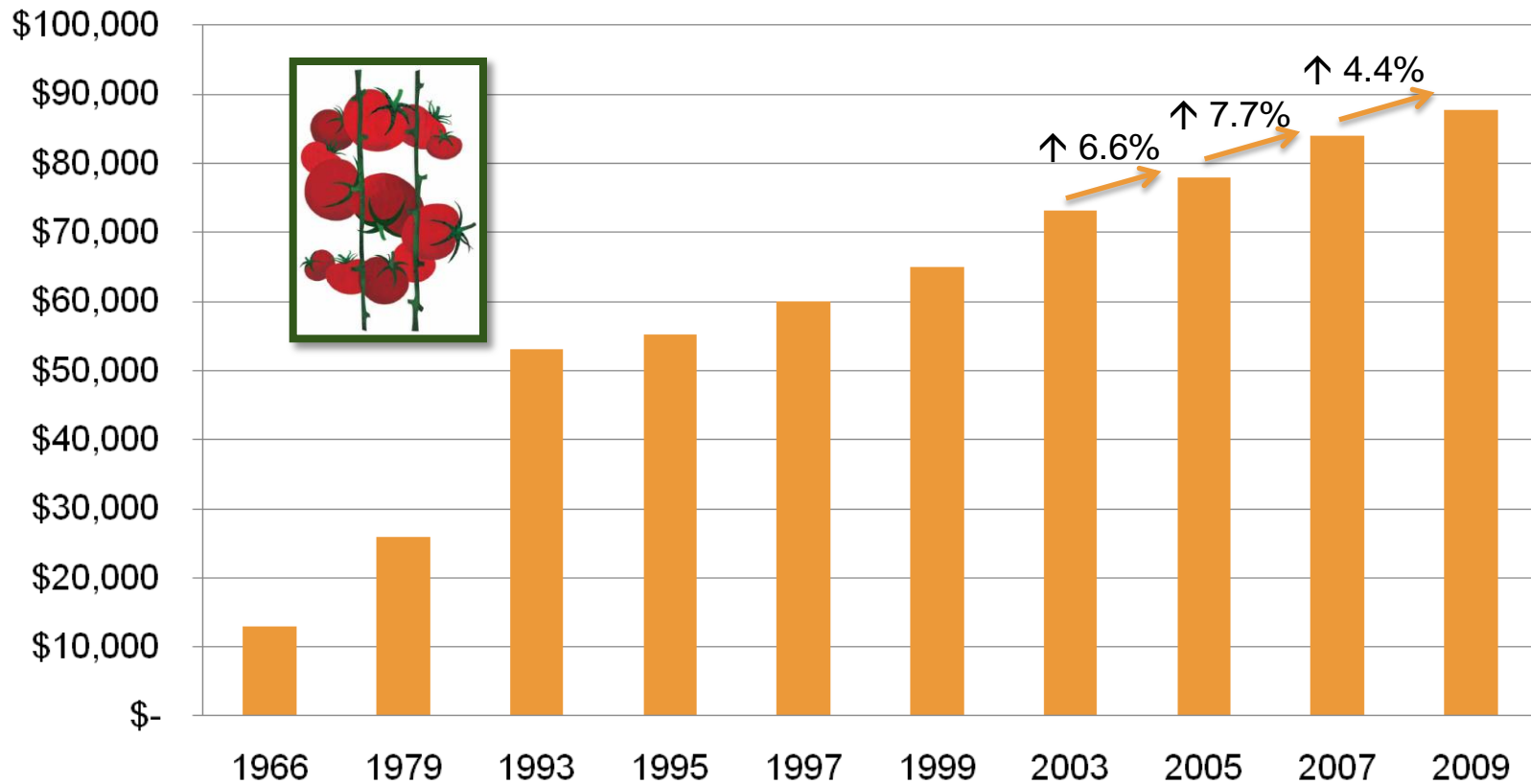
* Emerging areas include, but not limited to, regulatory science, food safety, dietetics, packaging, food security, food sustainability; critical training in communications, leadership development, interdisciplinary facilitation, international supply chains





Salaries

Median Salary for Food Scientists



Kuhn ME. Food Tech 2010;64:20-37
<http://www.bls.gov/oes/current/oes191012.htm> (May 2009)



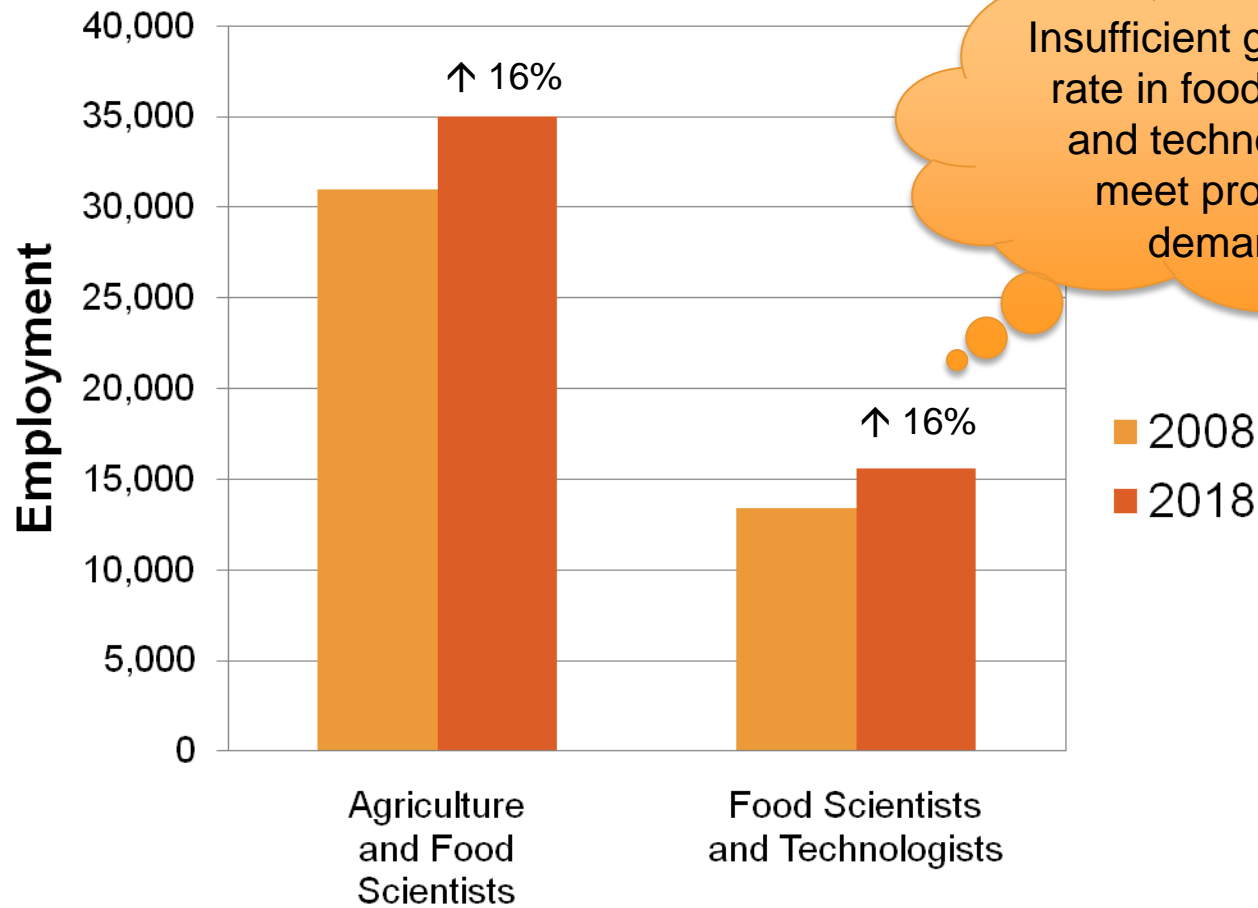
Projections for 2011

- Rapid growth as agriculture and food scientists develop technology and products using biotechnology, nanotechnology while limiting environmental impact
- Bachelor's degree in agriculture science adequate for most product development positions; Master's or doctorate preferred for research





Employment Projections





Occupation Projection (2018)



| Industry | 2008→2018 |
|---------------------|-----------|
| Food manufacturing | 7.7 |
| Animal food | 4.7 |
| Confections | -1.9 |
| Fruit/vegetable | -3.2 |
| Dairy | 6.5 |
| Seafood | 18.6 |
| Animal (processing) | 14.9 |
| Other (food) | 13.7 |

http://www.bls.gov/oco/ocos046.htm#projections_data
Accessed December 1, 2010



Dietary Guidelines: Agriculture Implications



- 8.9 million more acres of cropland would be needed to support vegetable production (2002 statistic); 10.3 million more acres (2015 projection)
- 4.1 million more acres of cropland would be needed to support fruit production (2002 statistic); 4.7 million more acres (2015 projection)
- In general, need nearly 2% increase in total US cropland (2002 statistic); more than 2.3% increase in total US cropland (2015 projection) or about 3% increase in harvested cropland (about 320 million acres; 1997 acreage)
- 107.7 billion additional pounds of fluid milk and milk products are needed (an increase of 66% - impact on number of dairy cows, feed grains, and “grazing” acreage); 124.6 billion additional pounds (2015 projection), nearly 80% increase (cows, feed grains, grazing acreage)

References (for the agriculture calculations)

Buzby, Wells and Vocke. Economic Research Report No. (ERR-31), November 2006

<http://www.ers.usda.gov/publications/err31/err31.pdf>

<http://www.census.gov/prod/2009pubs/10statab/pop.pdf>



Food Economy in China

Agence France-Presse — Getty Images



The rising costs for food and energy distort China's consumer price index, whose methodology has long been criticized.

The New York Times
By KEITH BRADSHER
Published: November 17, 2010



Food Science and Technology



Fresh tomatoes, after washing, breaking, pulping and removing peels and seeds, etc, are concentrated, sterilized, filled and sealed, which keeps the fresh taste.



Fat free instant noodles, vegetable/beef flavor package: Product Description: Noodles: Wheat flour, shortening, modified potato starch, salt, sugar, seasoning



Pollution-free Frozen Corn Quick Frozen Boiled Sweet Corn Vacuum Corn Frozen Corn Kernel Canned Sweet Corn Canned Corn Kernel Our factory integrates R&D, processing and produce frozen corn.



World of Food Science



- Food industry importance sector in Chinese national economy
- Food science and technology enjoys continuous growth
- China established goal to provide world-class education, especially in food science and technology (>180 institutions, 31 provinces, > 500 FT professors, > 100 guest lecturers and adjunct professors)
- 5-year plan > RMB 600MM (~\$90MM) investment + RMB 700 MM (~\$105 MM) in agriculture + RMB 100 MM (~\$15 MM) in food-related projects
- China established joint research centers with > 10 international universities (USA, Canada, UK, France, Japan, Korea)
+ scholar and student exchanges



Jiangnan University



Food Science in China

- The Chinese food industry is a dynamic and evolving industry with a wide range of opportunities
- Economics and food safety pose enormous pressures
- Consumers question whether Chinese products are safe, meet their sensory expectations, whether their costs are too high
- Most Chinese companies lack a technical infrastructure and a connection with the marketing activities
- Food scientists need to be more broadly educated vs. focusing on narrow disciplines to better function in this environment
- The demand for qualified food scientists in China is large and will continue to expand



A farmer picks rape blossoms at a farm on the outskirts of Shanghai, China

Food Beverages in China

Developments:

- China joined World Trade Organization (2001)
- China has growing disposable income (Urban, ~\$2400/capita; 2008)
- China imports nearly \$80 MM in food and beverage products per month with exports on the average of \$ 35-40 MM
- Total agricultural USA exports to China were \$1.1 B (1999)
- China is Asia's largest citrus producer, their poor transportation infrastructure and lack of cold storage facilities prevent many regions from receiving fresh, high-quality citrus products after the harvest
- USA has opportunity to export to these regions during the winter harvest season and during the spring season, after the Chinese harvest has peaked
- Current USA exports of citrus products to China (mainly oranges) is nearly \$100 MM per year
- Success in this market relies on relationships and the symbiosis of Chinese marketing and American technology



California Navel Orange



Food Service in China

- There are many forms of the institutional food services: military, academic institutions, communes
- China opened possibilities in the late 70's and early 80's (e.g., initial companies were Kentucky Fried Chicken, McDonald's)
- Challenges included banking rules, currency issues, basic infrastructures, duties and taxes, raw material sourcing, labor regulations → slow business development
- China has established policies to attract foreign investments
- China created business opportunities for all companies with 1.3 million potential customers
- Prevailing issues include currency convertibility, layers of government approval procedures, lack of supporting industries, transportation industries, low cost reliable raw materials and tax structures

The single most important requirement for entering China's HRI market: partner with a good distributor.

Market entry entails so many rules and so much red tape that few suppliers or end-users try to go it alone in this market.



New Food Ingredients in China

- China represents a growing point for the food industry
- China has about 500 ingredients and 1250 flavor substances approved and included in Hygienic Standards for Use of Food Additives
- Food ingredient development cannot meet the need of rapidly growing China food industry
- Ingredient needs include, but not limited to, flavors, yeast extract, sweeteners, sugar alcohols, oligosaccharides, preservatives, antioxidants, texturizers for bakery

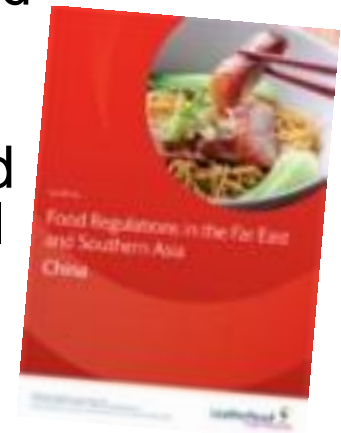


Chinese Onion

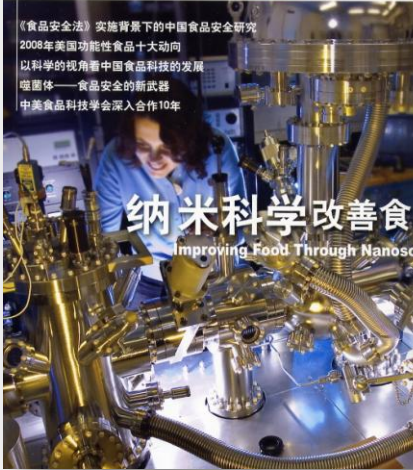


Food Regulations in China

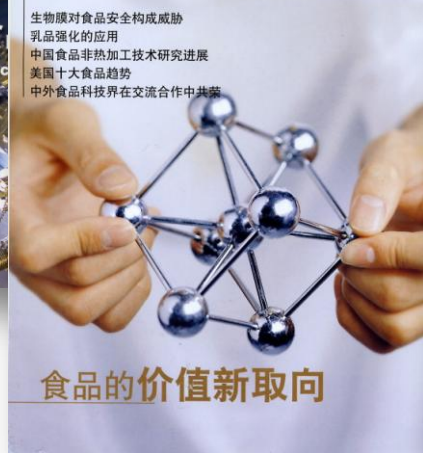
- China's food laws continue to increase in complexity
- Foodborne disease is a concern of consumers and public health authorities
- China's food system: 78% food processors < 10 employees and most farms being 2 acres or less.
- China's small farms combined with a cash-based and very large and fragmented food production system make traceability difficult
- China's WTO membership was a driving force that stimulated public health authorities
- China's awareness of the food control legislation and standards in other countries → a prerequisite in the international harmonization of food regulations
- Chinese system of food regulation is based on Food Standards and the National Hygiene Standard, and Standards for Food Additives
- State Food and Drug Administration (2003)



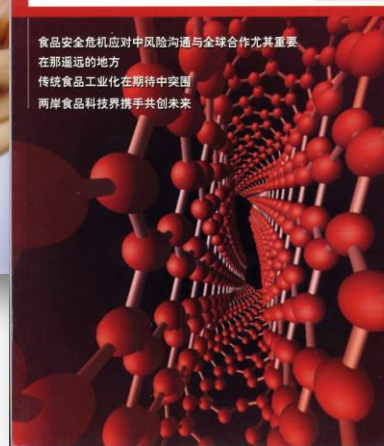
IFT Partnership with Chinese Institute of Food Science & Technology (CIFST)



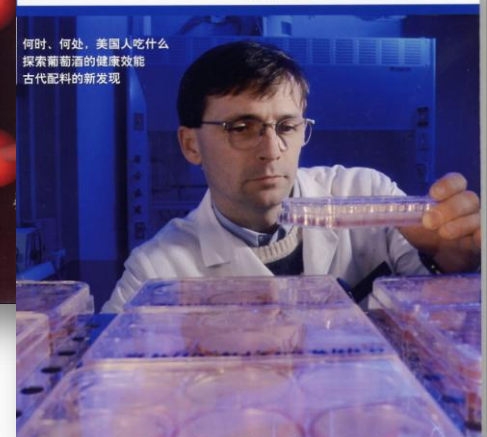
Nanoscience



Nanotechnology



Nanoscale



Iron Bioavailability

IFT Partnership with Chinese Institute of Food Science & Technology (CIFST)



- Collaboration for 10+ years
- Bi-annual educational summit
- Collaborative partnership symposia at IFT annual meeting
- We would love to replicate Almond Board support for CIFST to IFT to further cement collaboration and foster innovation in product development
- For more information about IFT's activities, please contact Amanda Perl aperl@ift.org



Thank You



Chocolate Fortunes in China

Lawrence L. Allen, Author of *Chocolate Fortunes*





Chocolate Fortunes In China

Lawrence L. Allen



China's Chocolate Journey

1978: CHINA WAS A CRUCIBLE

(Isolation & Cultural Revolution)

- **CHOCOLATE** (totally foreign product)
- **BRANDS** (-0- brand awareness)
- **CONSUMERS** (-0- product experience)



...were mixed together to create

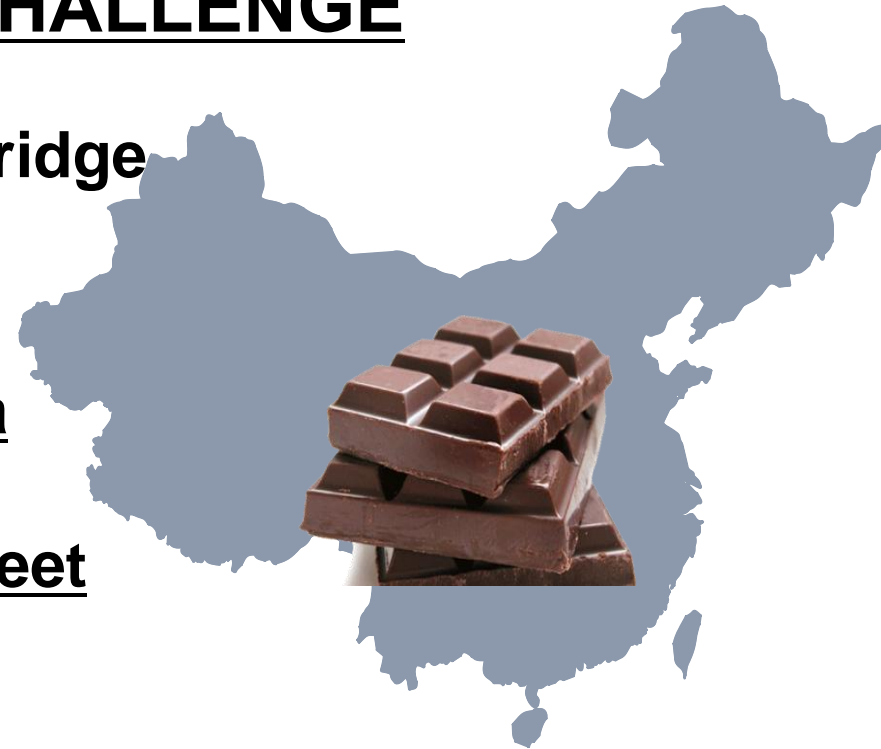
an entirely new chocolate market !



Chocolate's China Journey

CHOCOLATE INDUSTRY'S CHALLENGE

- Establish culinary & cultural bridge
- Navigate the complexities and ambiguities of emerging China
- Understand consumers and meet their expectations





Chocolate's China Journey

ANY PLAYER COULD HAVE BECOME #1

- Emerging chocolate market A LEVEL PLAYING FIELD for all companies
- Consumers viewed chocolate as exotic foreign product - all enjoyed the SAME PRESTIGE AND CREDIBILITY
- Retail prices relatively high / manufacturing costs relatively low
- NO FINANCIAL BARRIERS TO ENTRY
- Not a strategic industry, so NO REGULATORY BARRIERS
- EACH WAS FLYING BLIND with lack of consumer & market information, and BY THE SEAT OF THEIR PANTS with China's mercurial economic and regulatory environment.
- NO LOCAL PLAYERS TO SPEAK OF

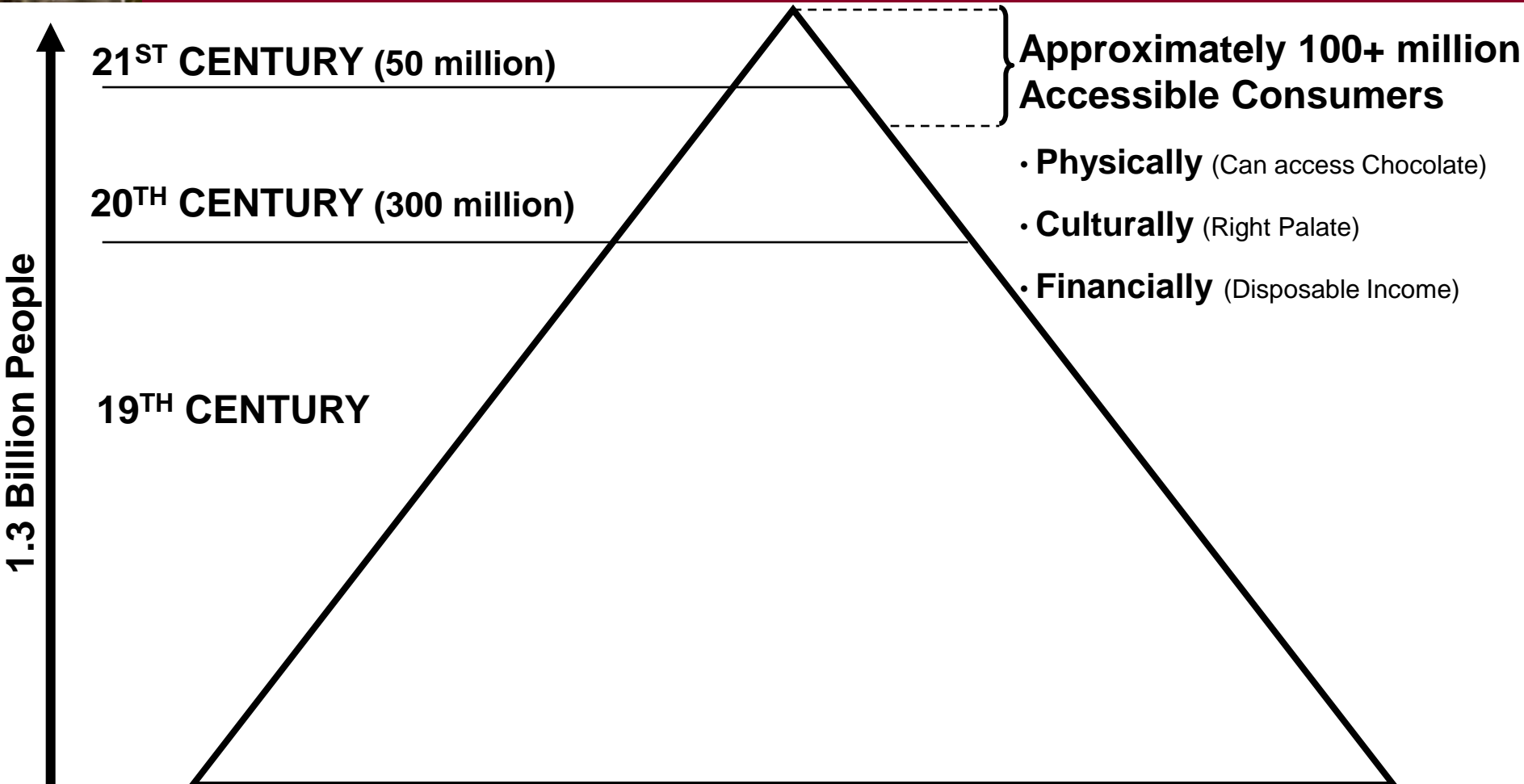
***WHICH WOULD ESTABLISH THE CHOCOLATE
TASTE PROFILE IN CHINA?***



The Emerging China Market



Accessible Consumers: Defined



Accessible Consumers:

1980s: 10~20 Million

1990s: 20~60 Million

2000s: 60~100+ Million

NOTE: Wrigley Estimates that it only reached ~ 700 Million with its RMB 1.0 5-Stick pack of Double Mint





Accessible Consumers: Location



Consumers:

- Physically (Can access Chocolate)
- Culturally (Right Palate)
- Financially (Disposable Income)



China's Little Emperors

- ONE CHILD PER FAMILY policy
- Over 100 MILLION strong
- Demanding & wielding “PESTER POWER” - *control spending power of six adults*
- TASTE FOR WESTERN foods / snacks - *an economic force of their own.*
- Lead chocolate CONSUMPTION PATTERN to mirror DEVELOPED MARKETS

- - *within the space of their lifetimes.*

PALATE TRAINED TO:

4 Grandparents

*Vegetables, Rice, Noodles,
Dumplings, Meat as Garnish*

2 Parents

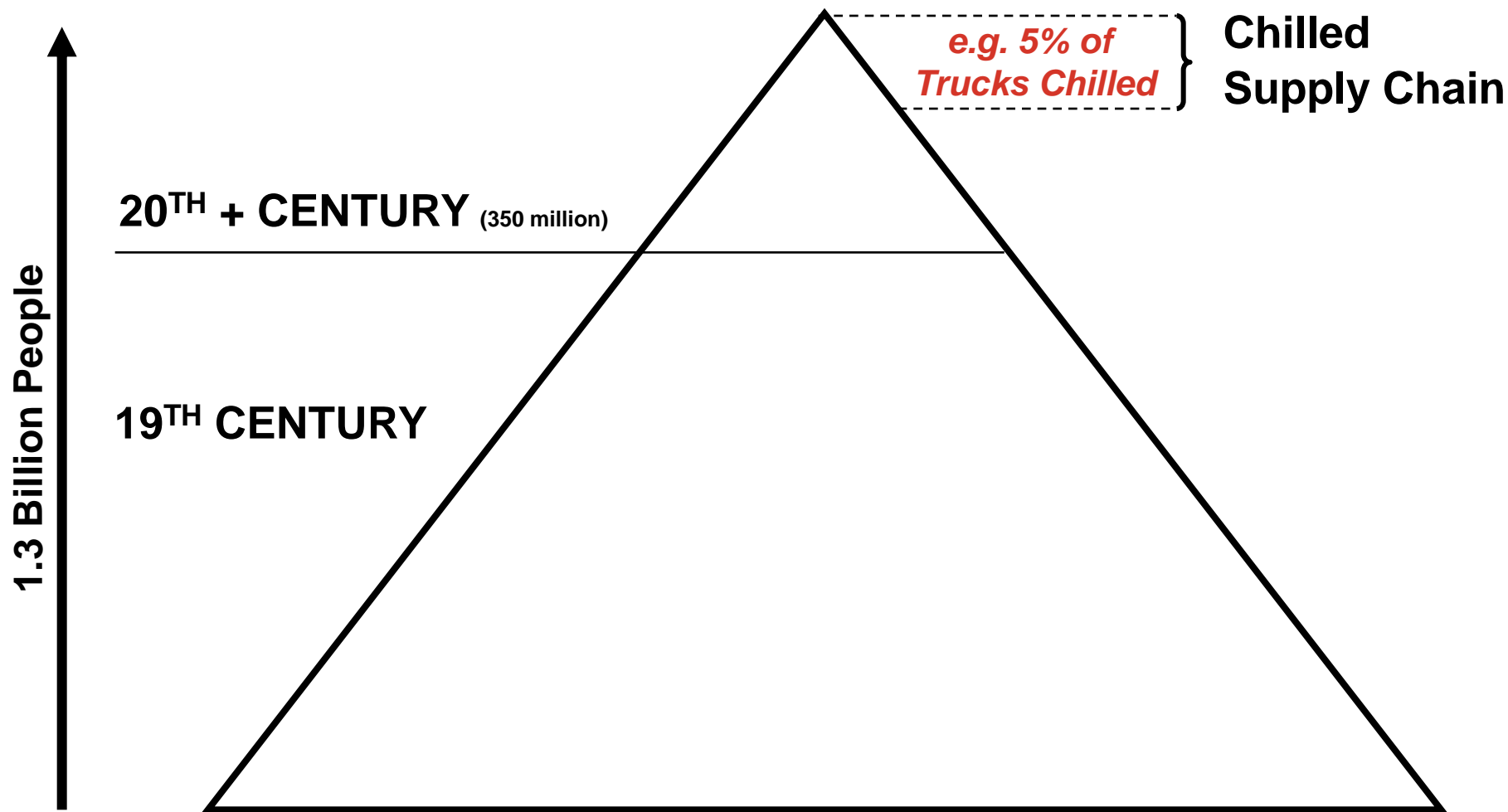
*Vegetables, Rice, Noodles, Dumplings
more Meat, as main course
Accept most western foods*

**Little
Emperors**

*Fast Food: KFC, McDonald's, Pizza Hut
Baked goods (bread), Sweet packaged snacks,
Vegetables, Rice, Noodles, Dumplings: Occasionally*



Supply Chain: Pyramid



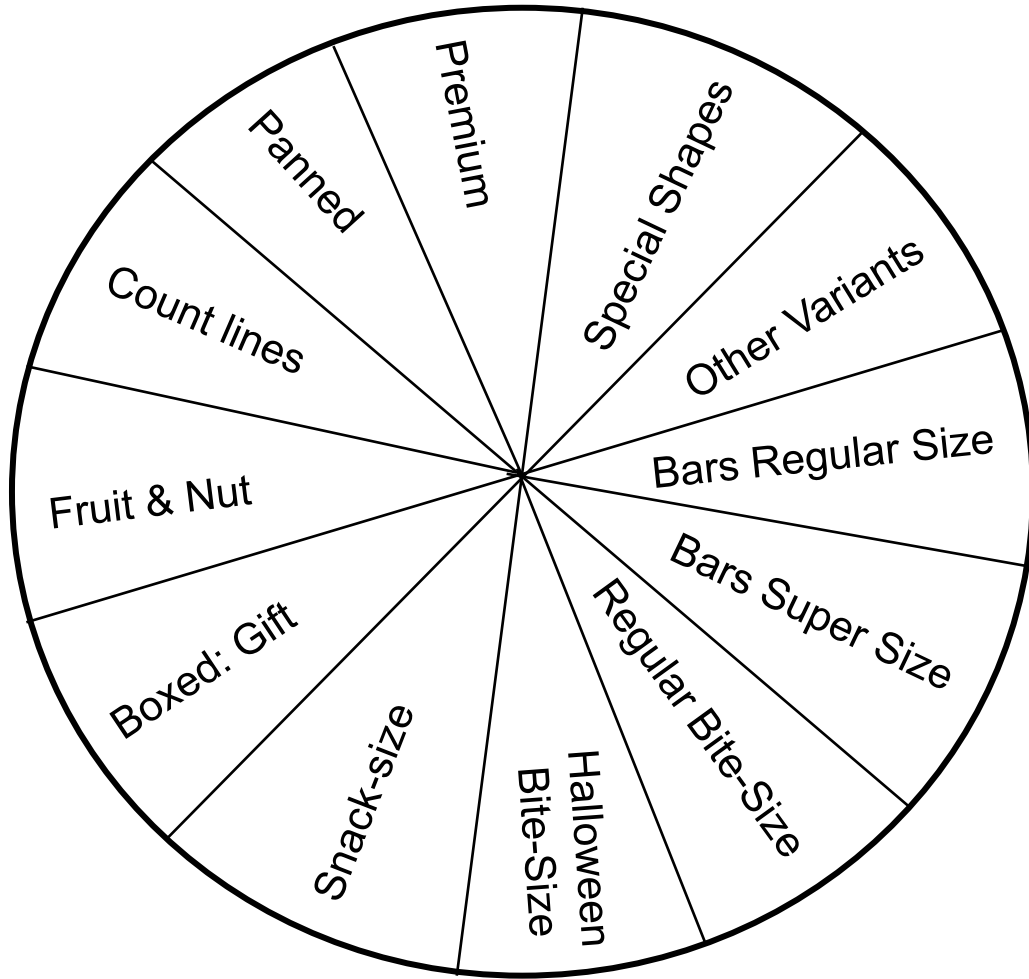
Supply Chain: Gauntlet



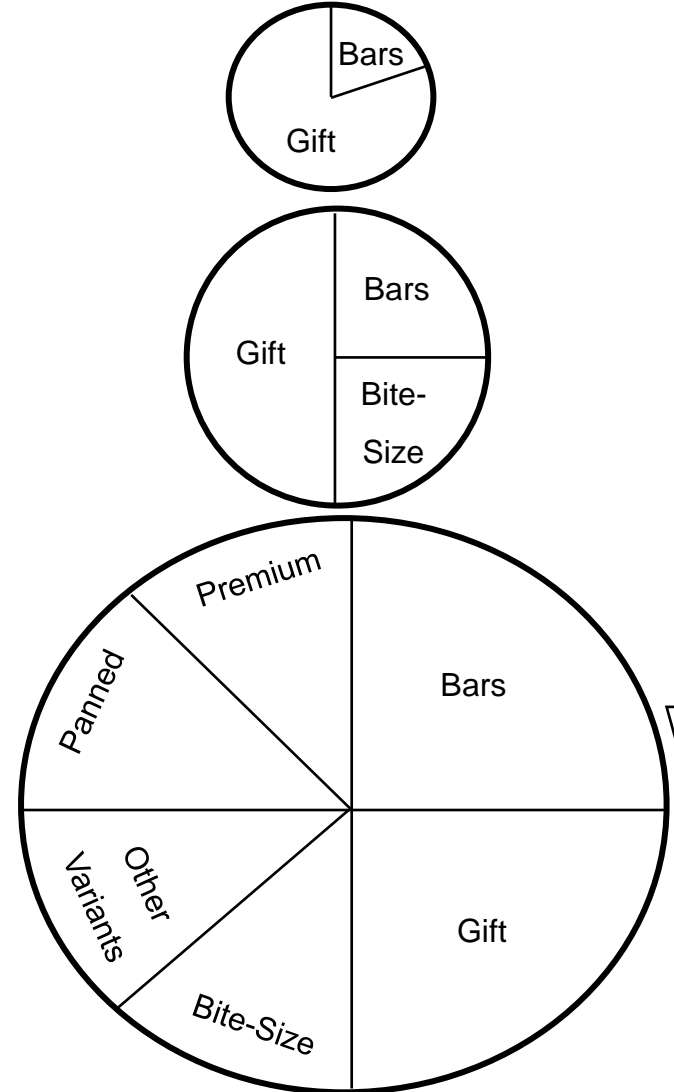


Chocolate Market: Evolution

USA



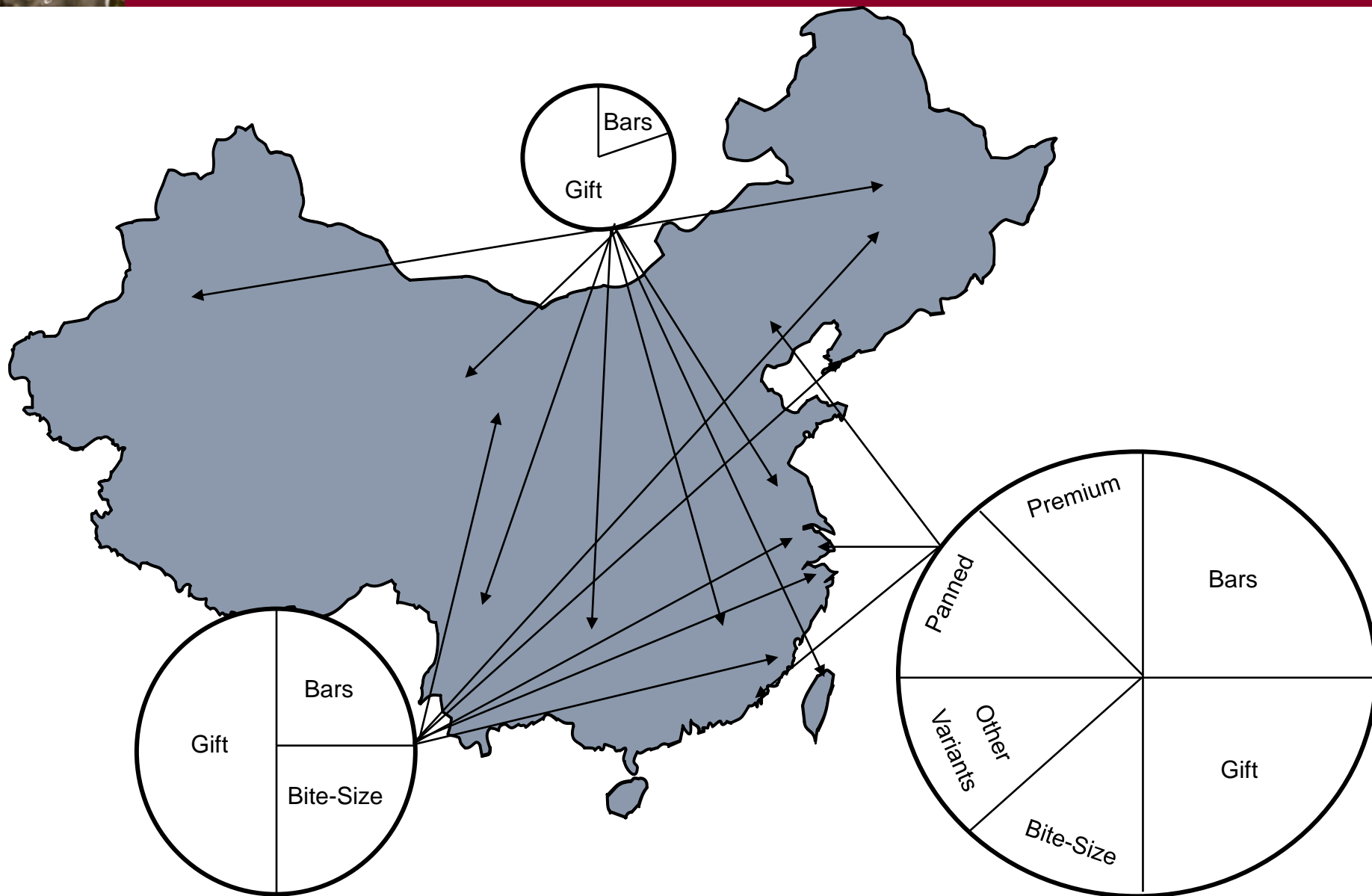
China



TIME



Multi-Tier Market





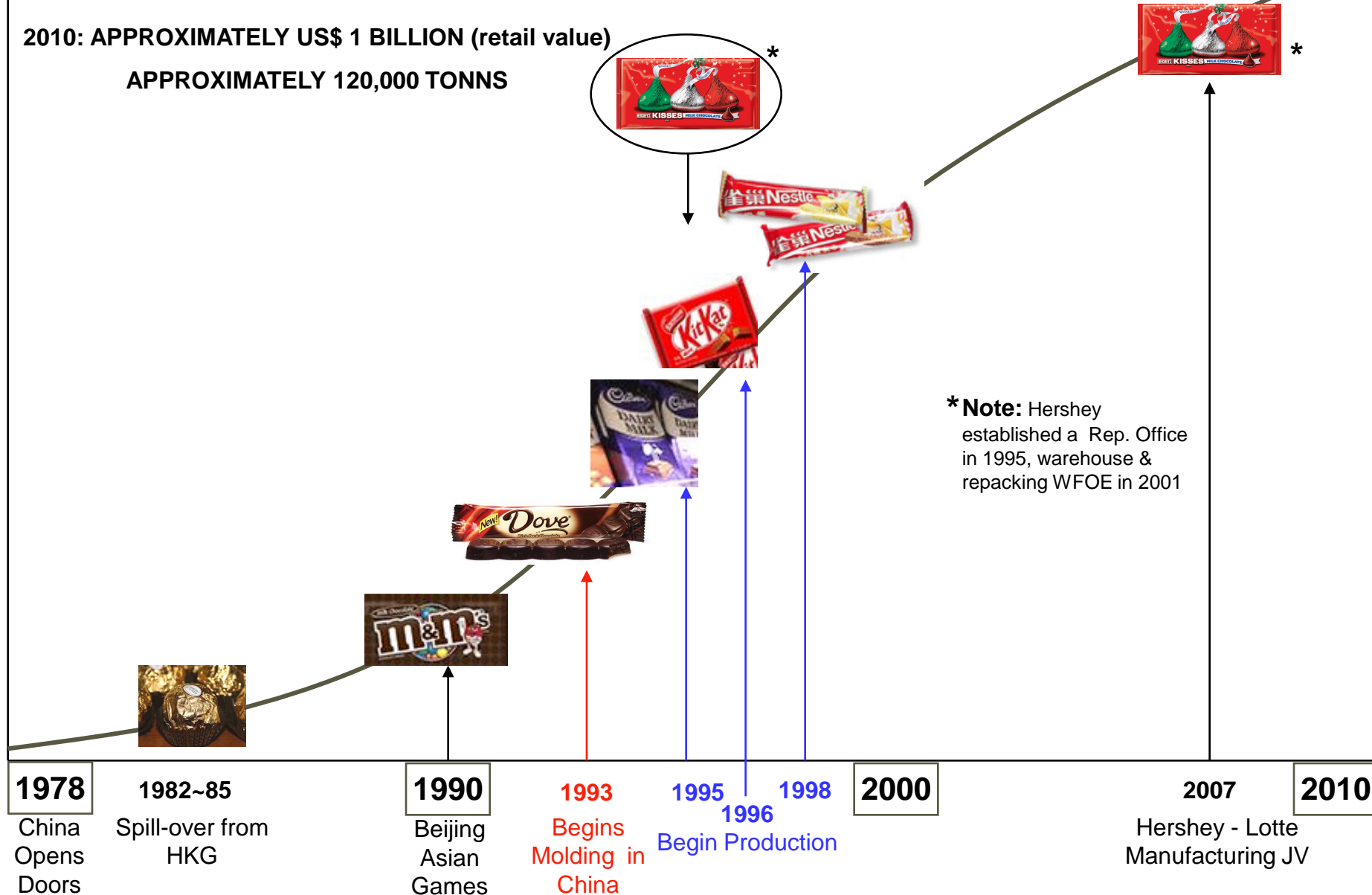
Chocolate Competitors



Competitor: Market Entry

2010: APPROXIMATELY US\$ 1 BILLION (retail value)
APPROXIMATELY 120,000 TONNS

Market Size





Ferrero: Accidental Hero



Newcomer to retail chocolate, the wild card, with one of the most expensive and exotic chocolate

- Created in 1982
- Hand carried into China as gift - Lunar New Year
- Created the first impression of chocolate - 1980s
- Consistently invested in brand building with consumers
- Hasn't changed a 4 P's formula that has worked for 25 years

Hershey: Kissed Market Leadership Goodbye



U.S. domestic-oriented, and did not have a proven track record in more diverse and varied international marketplace.

- **Stepped entry = flexibility: started with bars, shifted to Kisses**
- **#1 in Shanghai, # 2 in most other key cities**

But...

- **Organizational chaos in China and International Division**
(Total in-country team change in 2001, 4 International Division Heads in 4 years)
- **China organization collapsed in 2004 – disappeared for 2 seasons**



Nestlé: Sideshow



Selling chocolate worldwide since turn of 20th century, great depth and perspective to approach China market.

- Only 1 viable chocolate product: Kit Kat
- Compound chocolate / low price strategy
- Overbrand Strategy: little investment in Sub-Brand building
- A 3-year ROI on plant drove short-term investment decisions

Note: KitKat is manufactured by Hershey under license in the United States



Mars: Determined Hero



American company, with established international presence and broad base of experience to apply in China.

- 1st To proactively market / 1st With In-Country Manufacturing

And...

- Consumer Responsive: from M&Ms to Dove when consumers demanded
- Imported block chocolate & molded in-country: manufactured later
- Used master distributor for first 7 years
- Invested heavily in building brands
- A 15-year investment horizon



Cadbury: Catastrophe



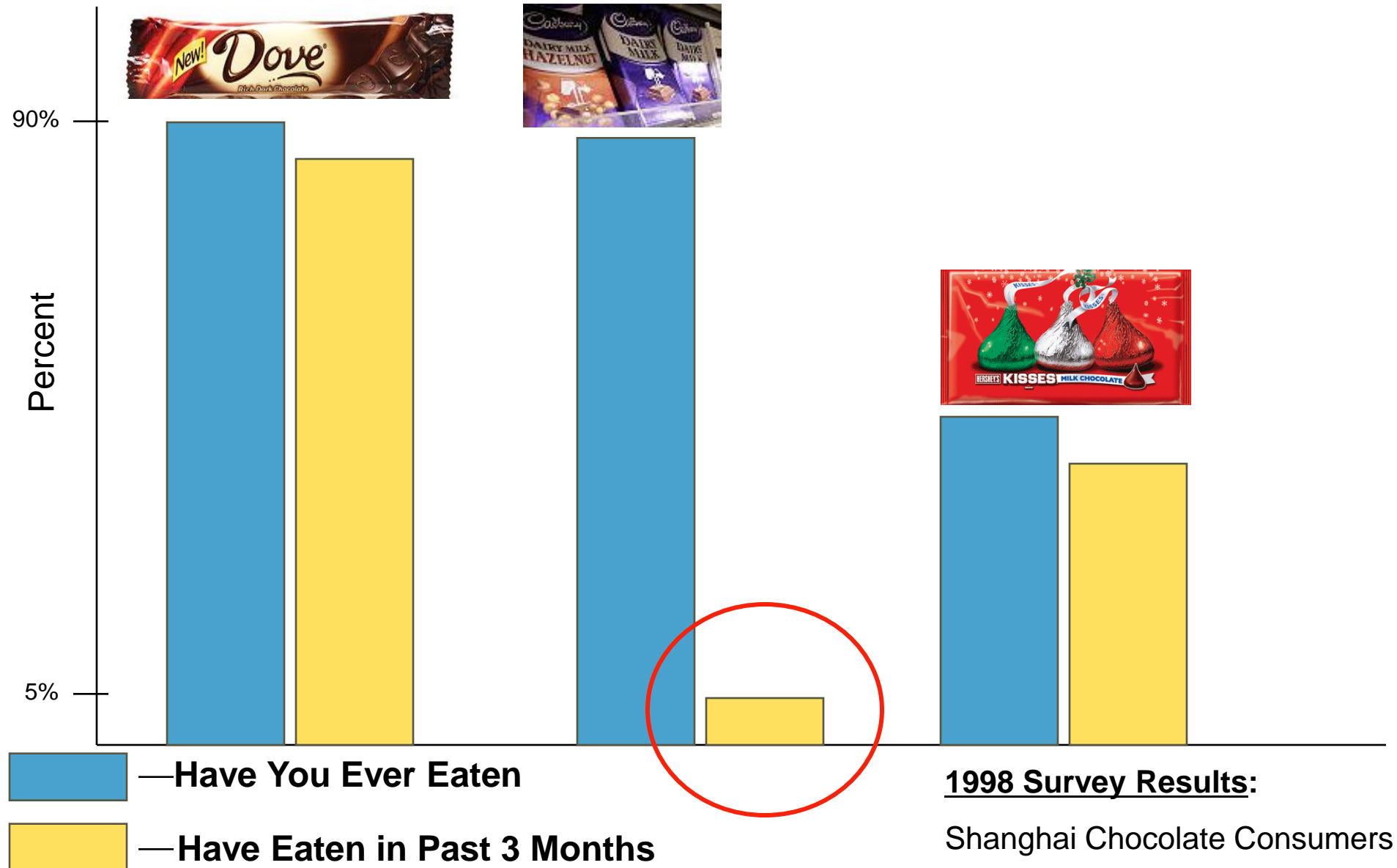
Also selling chocolate worldwide from turn of 20th century

- **2nd With In-Country Manufacturing / Invested in brands**

But...

- **Did own distribution from start: mired in delivery & collection issues**
- **Manufactured with local ingredients from the start = taste variance**

Cadbury: '95-'97 Taste Crisis





Cadbury: 2008 Melamine Crisis

September 2008:

The Chinese government reported that over **50,000 people sickened**, nearly **13,000 hospitalized**, and four infants had died from drinking milk and milk-based infant formula contaminated with the industrial chemical melamine...

September 29, 2008:

Cadbury announced that it was recalling its China-made Dairy Milk Chocolate because it had tested positive for trace amounts of melamine. Its announcement explained that the tests **“cast doubt on the integrity of a range of our products manufactured in China.”**





Cadbury: Catastrophe (cont...)



Also sold chocolate worldwide from turn of 20th century

- 2nd With In-Country Manufacturing / Invested in brands

But...

- Did own distribution: mired in delivery & collection issues
- Manufactured with local ingredients from the start = taste variance
- **Limited investment “pain” threshold vs. Mars (Corp vs. Family business)**
- **Organizational chaos (6 China Country Heads in 7 years, after 2000)**



Opportunities For the Almond Industry

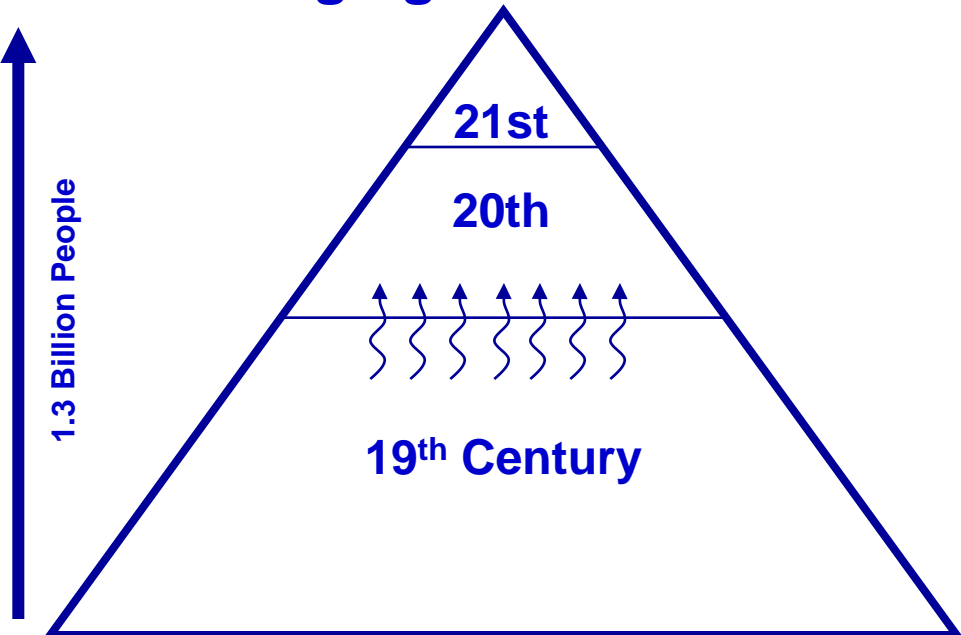


Strategies for Growing the Ingredients Market

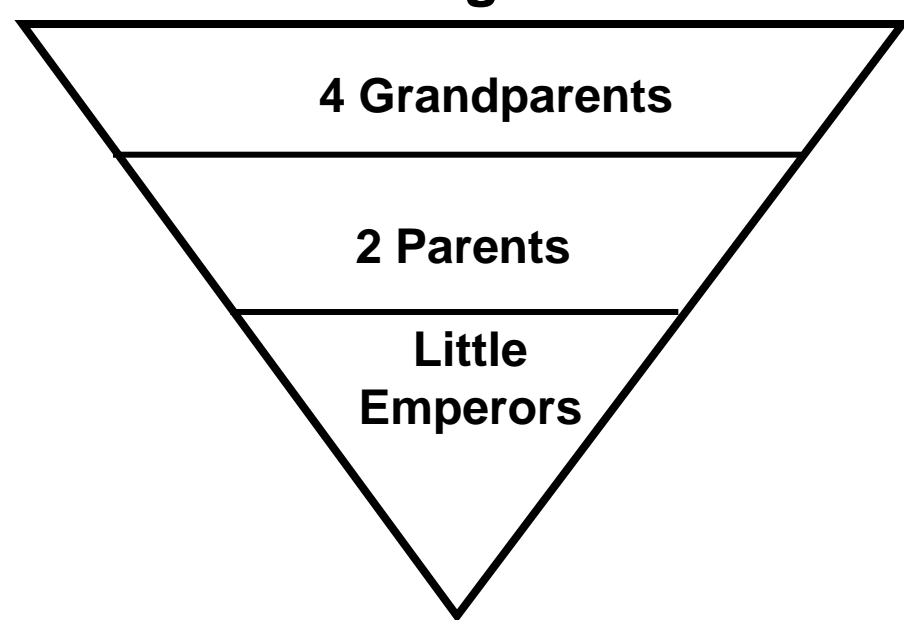


Be Available, Be Visible...

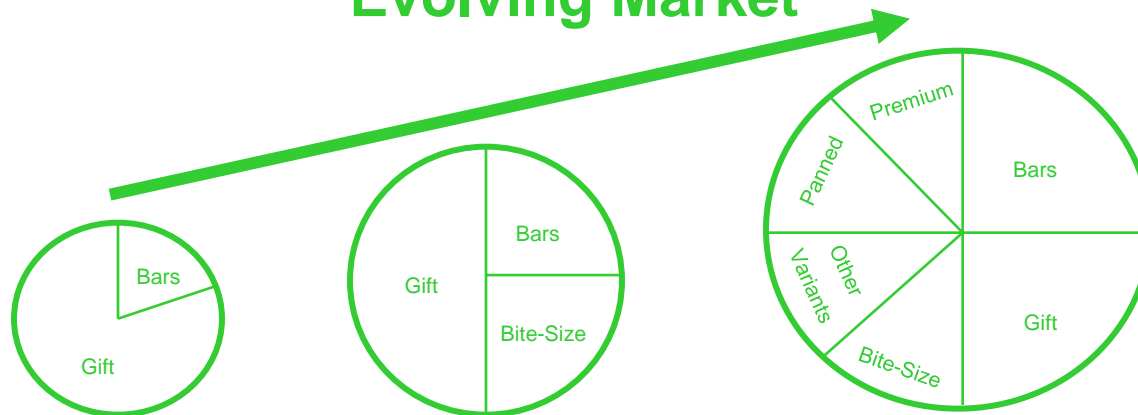
Emerging Consumers



Evolving Palate



Evolving Market





Be Desirable

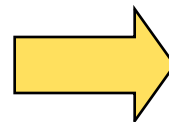


*** Accessible Chinese Consumers
are Aspirational Consumers !**



Customer: Ingredients Buyers

What is of critical importance to ingredients buyers?



Food Safety

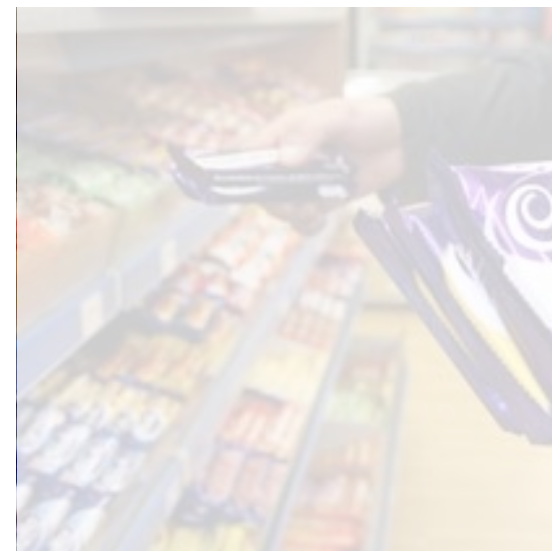
Cadbury Melamine Crisis: 2008

September 2008:

The Chinese government reported that over 50,000 people sickened, nearly 13,000 hospitalized, and four infants had died from drinking milk and milk-based infant formula contaminated with the industrial chemical melamine...

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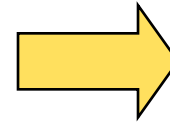
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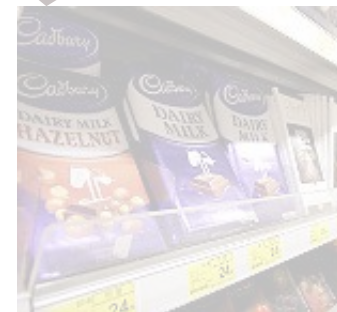
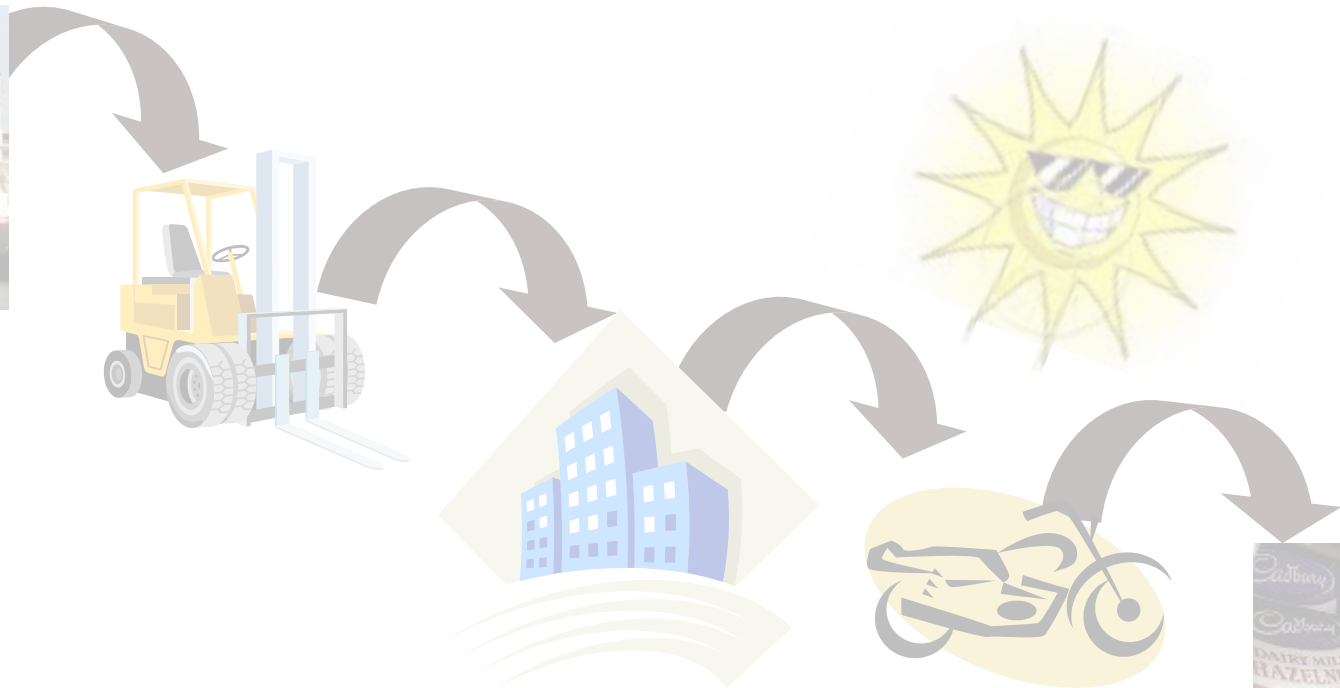
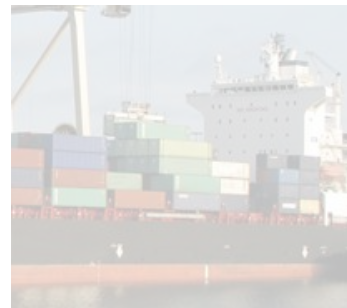
Customer: Ingredients Buyers

What is of critical importance to ingredients buyers?



Freshness

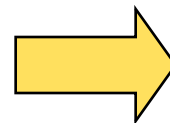
Superior shelf-life under ambient conditions...





Customer: Marketers & BU's

What is of critical importance to marketers & BU Heads?



Consumption





Winning Future Battles

EXACTLY WHAT IT REQUIRED IN THE PAST:

Visionary LEADERS

**Sustained long-term COMMITMENT
the market AND CONSUMER**

**Unrelenting focus on meeting
expectations of China's emerging
CONSUMER**





Thank You



Capitalizing on China's Rapid Food Industry Development

Dr. Sharon Shoemaker, UC Davis





East Meets West:

Bridging the Cultures with Innovative Food/Almond Solutions

Capitalizing on China's Rapid Food Industry Development

a perspective by

Sharon Shoemaker, Ph.D.

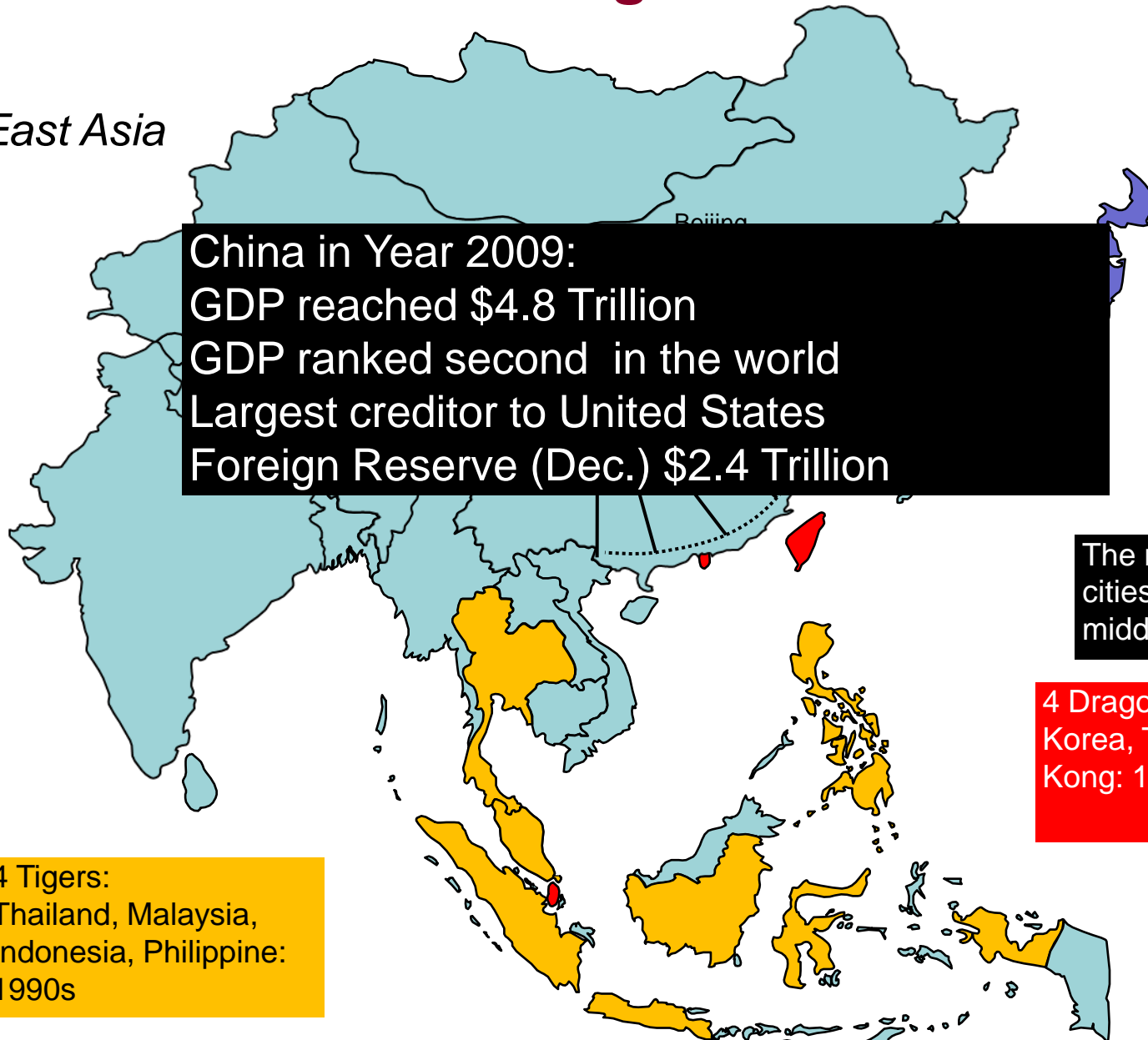
苏梅 博士

California Institute of Food and Agricultural Research
University of California, Davis



Globalization Shifting from 70's—21st Century

East Asia



China in Year 2009:
GDP reached \$4.8 Trillion
GDP ranked second in the world
Largest creditor to United States
Foreign Reserve (Dec.) \$2.4 Trillion

Japan:1970s

The real dragon: Coastal cities of China: in the middle of 1990s

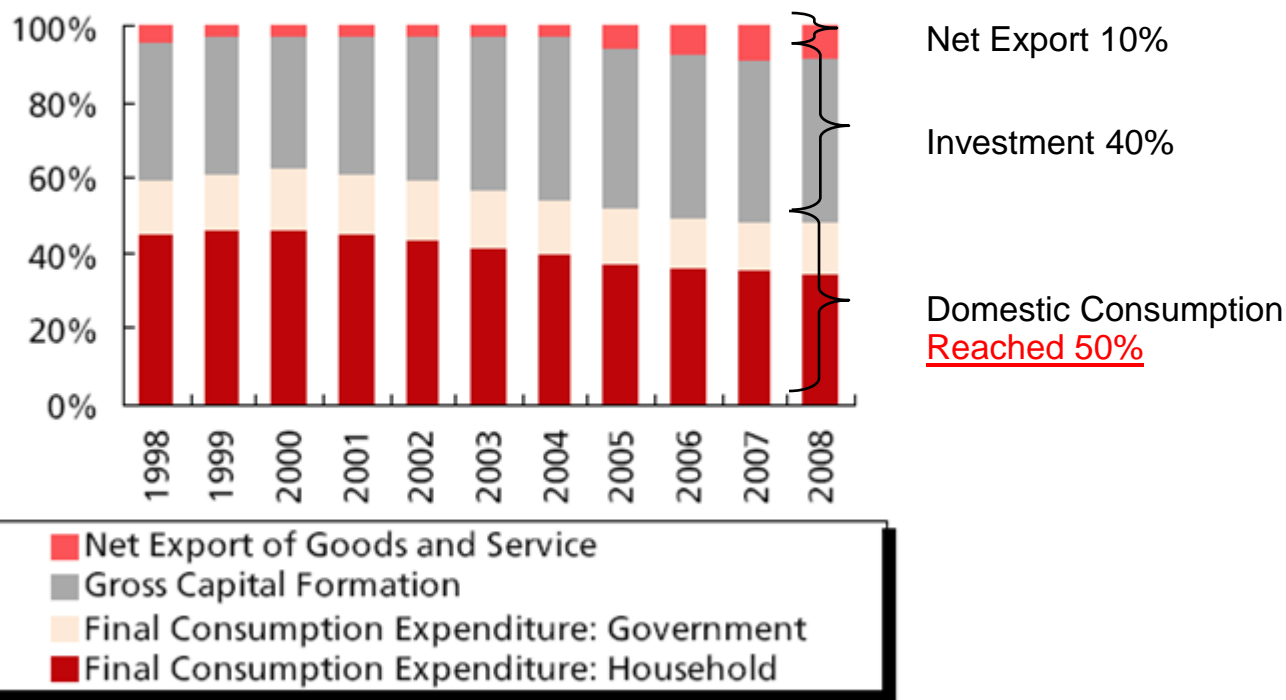
4 Dragons: Singapore, Korea, Taiwan, Hong Kong: 1980s

4 Tigers:
Thailand, Malaysia, Indonesia, Philippine: 1990s



Domestic Consumption-Driven Economic Growth

China GDP breakdown



Source: CEIC

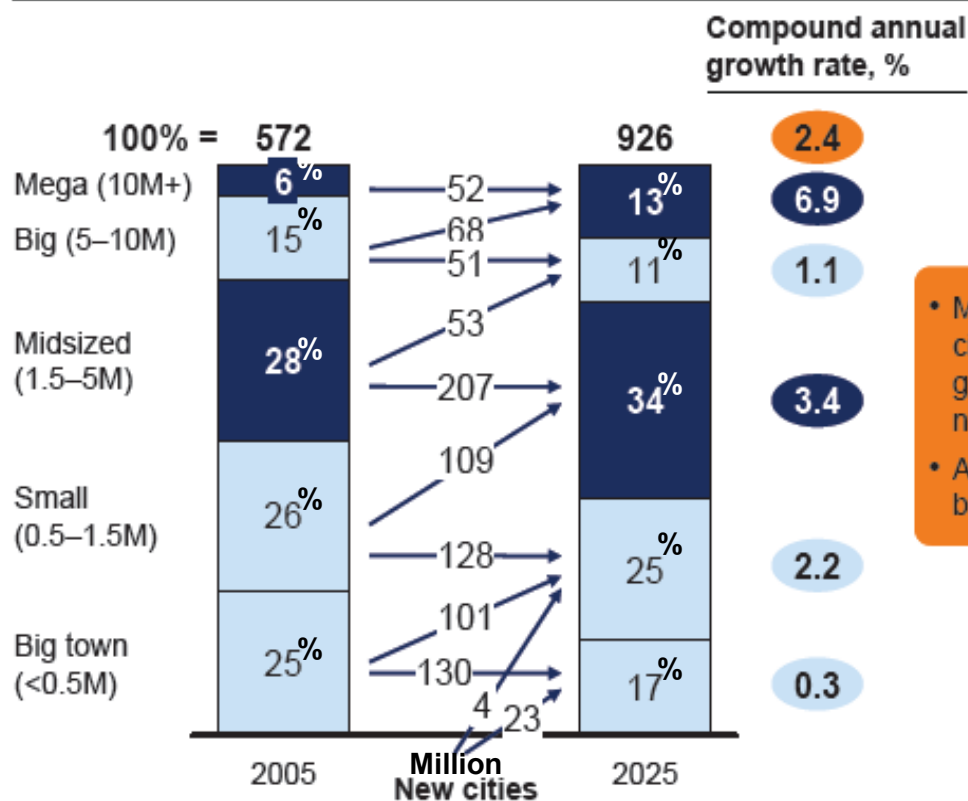
Domestic consumption policy facilitates the shift in economic growth pattern, which **pushes the percentage of domestic consumption up** during current economic development.



Urbanization is the Driver Behind Growth in Domestic Consumption

Population by city size

Millions of people, % (urban people)



- Mega and midsized city populations will grow faster over the next 20 years
- An urban billion will be attained by 2030

- The projected China's urban population will expand from 572 million in 2005 to 926 million in 2025. - this increase of more than 350 million Chinese city dwellers is larger than the entire population of the United States today
- By 2030, China's urban population is on track to reach 1 billion

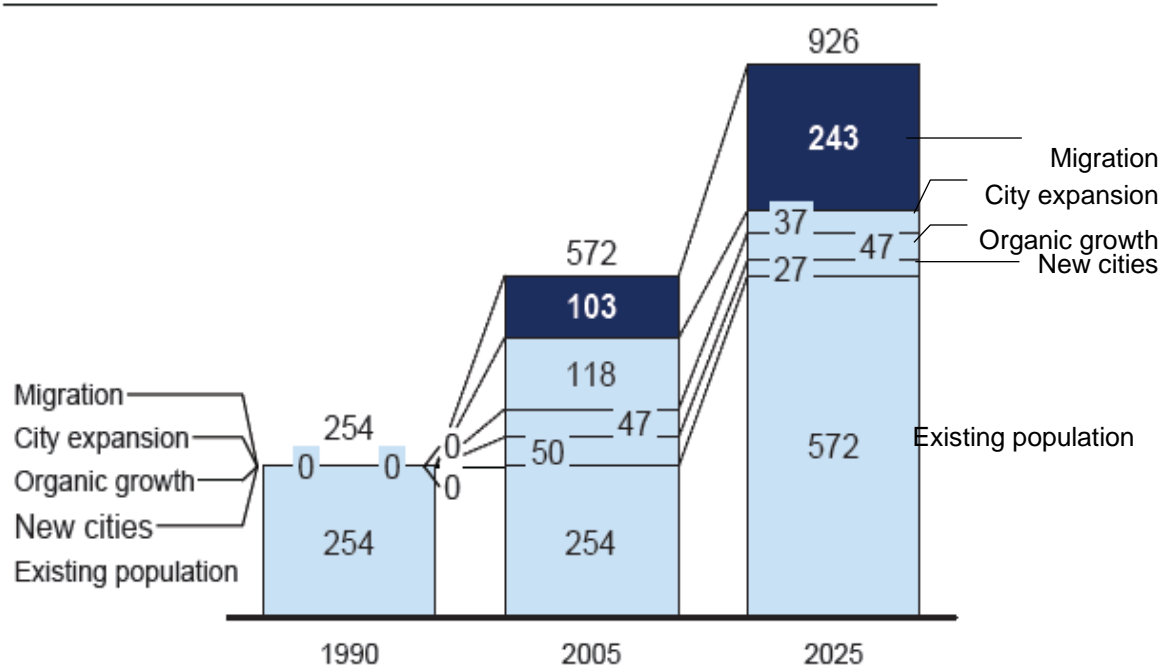
Courtesy of Edward Zhu, CEO, CHIC Group

(source: McKinsey Global Institute China All City Model, McKinsey Global Institute Analysis)

Migration will be the Driving Force of Future Urbanization

Sources of urban population increase

Millions of people



- Migration will drive almost 70 percent of urban population growth from 2005 to 2025
- By 2025, existing migrants (103 million) and new future migrants (243 million) will represent almost 40 percent of the total urban population

Rapid urban development coupled with surplus populations in rural areas generated by gradually increasing productivity in the countryside will together act to boost the mobile population to about an additional 240 million people in the next 20 years.

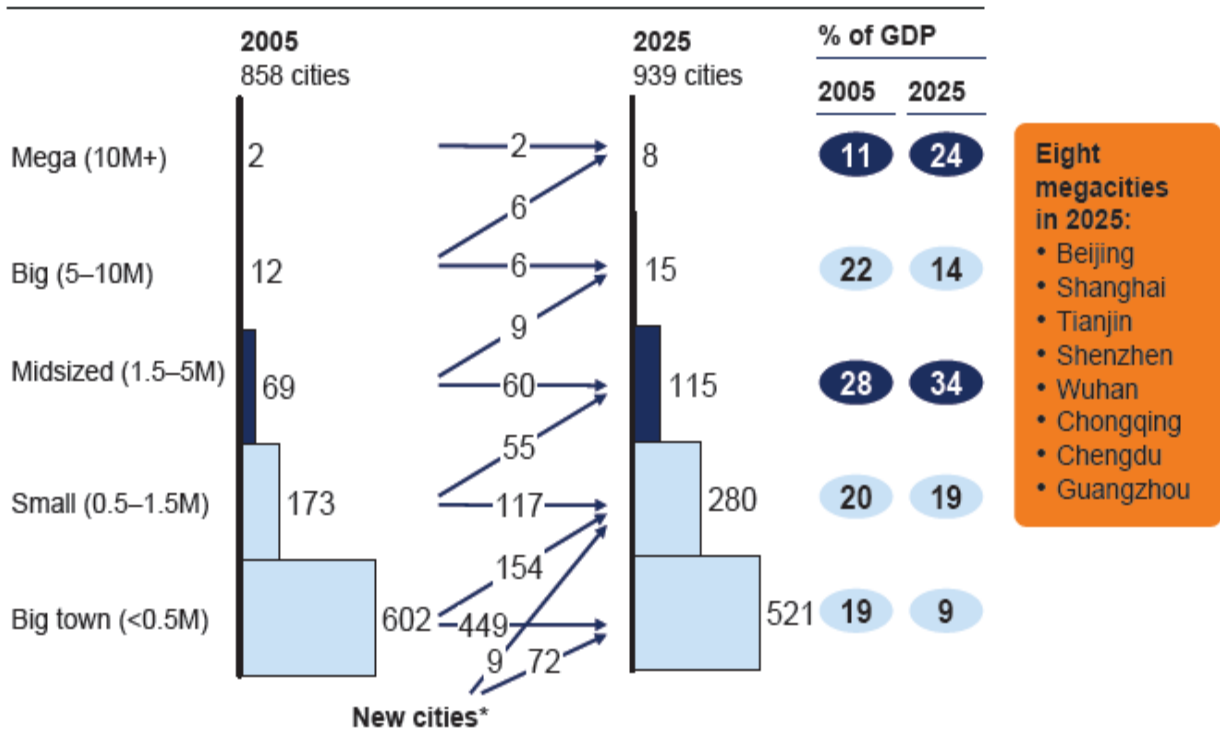
Courtesy of Edward Zhu, CEO, CHIC Group

Source: McKinsey Global Institute China All City Model, McKinsey Global Institute Analysis



New Megacities will Emerge by 2025

Distribution by city size
Number of cities



•From the MGI model, the number of new cities between 2000 and 2005 was nine, accounting for about half a percent of total urban population

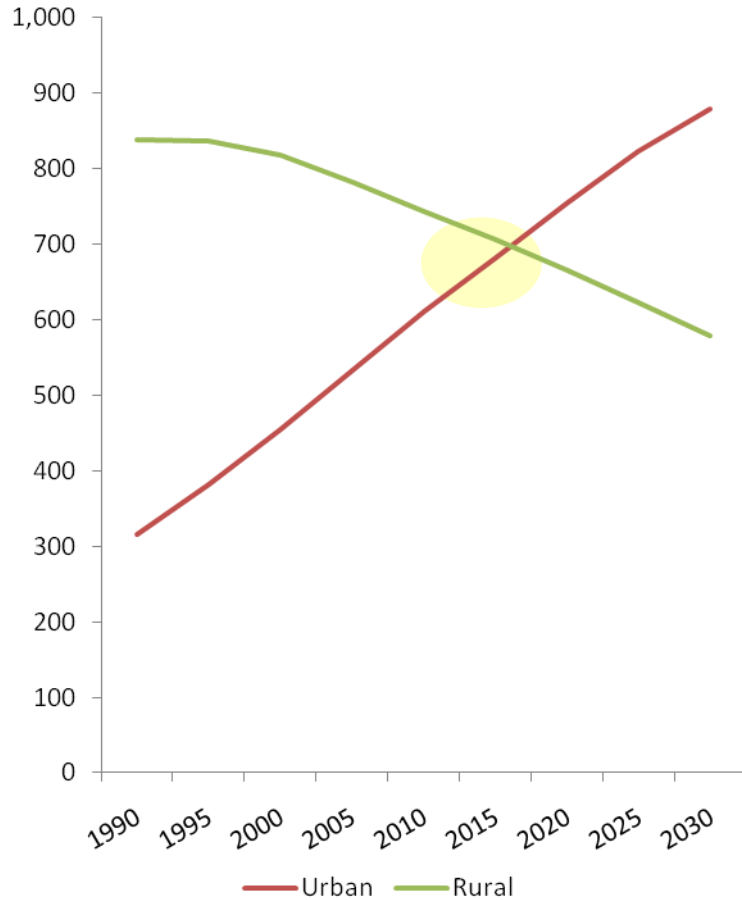
Courtesy of Edward Zhu, CEO, CHIC Group

Source: McKinsey Global Institute China All City Model, McKinsey Global Institute Analysis

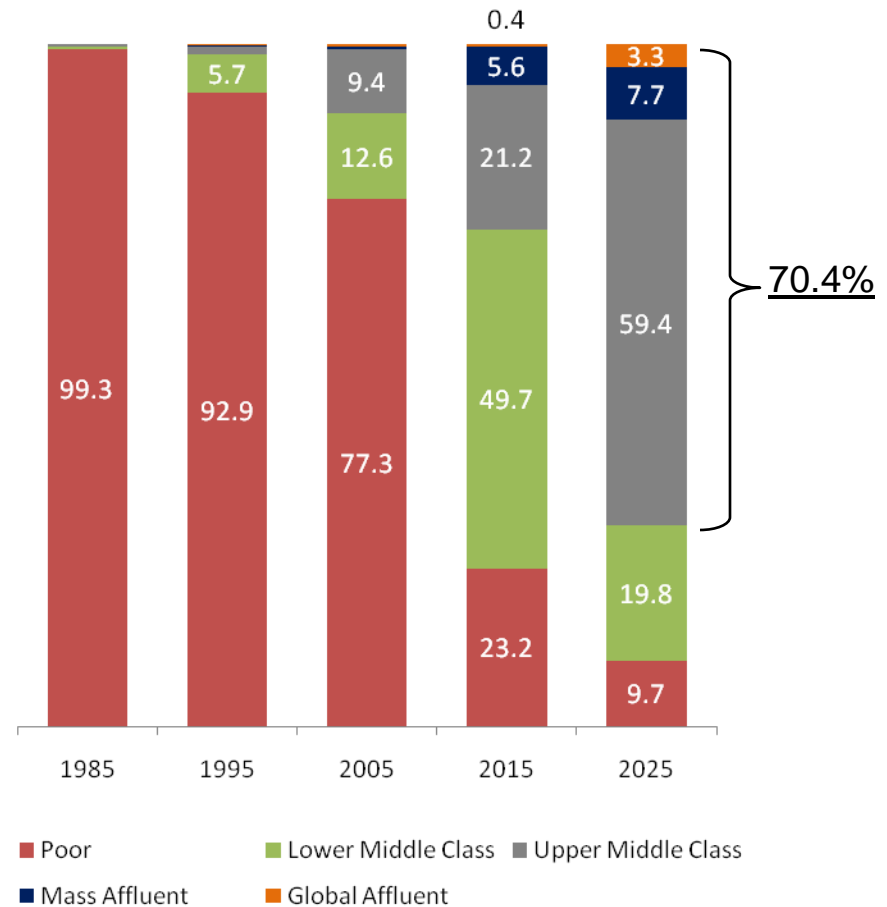


Urbanization is a Major Driver, Leading to a Massive Middle Class in China

China Urban and Rural Population (millions)



China's Emerging Middle Class (percentage)



Courtesy of Edward Zhu, CEO, CHIC Group (source: UN Population Division, McKinsey & Co.)



What will Urban Chinese Buy?

For urban China (real renminbi, base year = 2000)

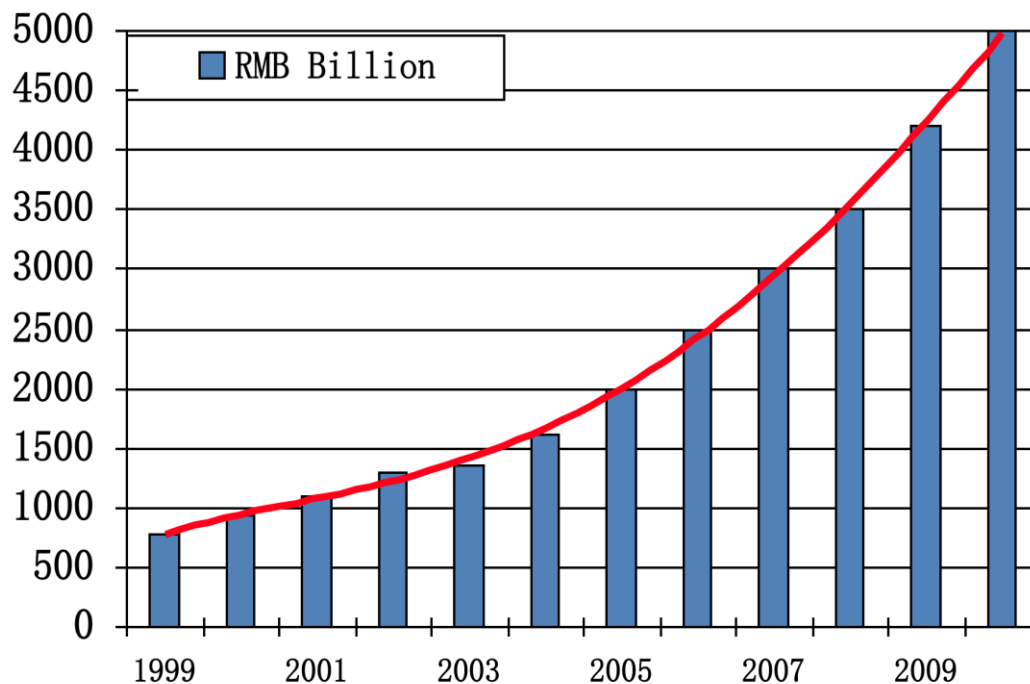
| Product category | Projected change in absolute consumption, billion renminbi ¹ | Absolute growth, 2004–25, billion renminbi ¹ | Projected compound annual growth rate, 2004–25, ¹ % |
|-------------------------------|---|---|--|
| Food ² | 1,223 / 4,786 | 3,562 | 6.7 |
| Recreation, education | 507 / 3,415 | 2,908 | 9.5 |
| Transportation, communication | 452 / 2,920 | 2,468 | 9.3 |
| Apparel | 369 / 1,322 | 953 | 6.3 |
| Housing, utilities | 321 / 3,313 | 2,992 | 11.8 |
| Health care | 257 / 2,582 | 2,325 | 11.6 |
| Household products | 223 / 857 | 634 | 6.6 |
| Personal products | 119 / 771 | 652 | 9.3 |

¹Base case forecast, Q1 2006; 1 renminbi = \$0.12.
²Figures do not sum to total, because of rounding.

Courtesy of Edward Zhu, CEO, CHIC Group
 (Source: National Bureau of Statistics of China, McKinsey Global Institute Analysis)



The Food Industry has become an Important Pillar in China's Economy



The Total Output of Food Industry in China

In 2008, the total food industry output in China reached RMB **4.2 trillion**, and ranked No. 2 industry (No.1 for 16 consecutive years before 2007)



Regional Comparison of Food Industry



2007 (3300 billion)

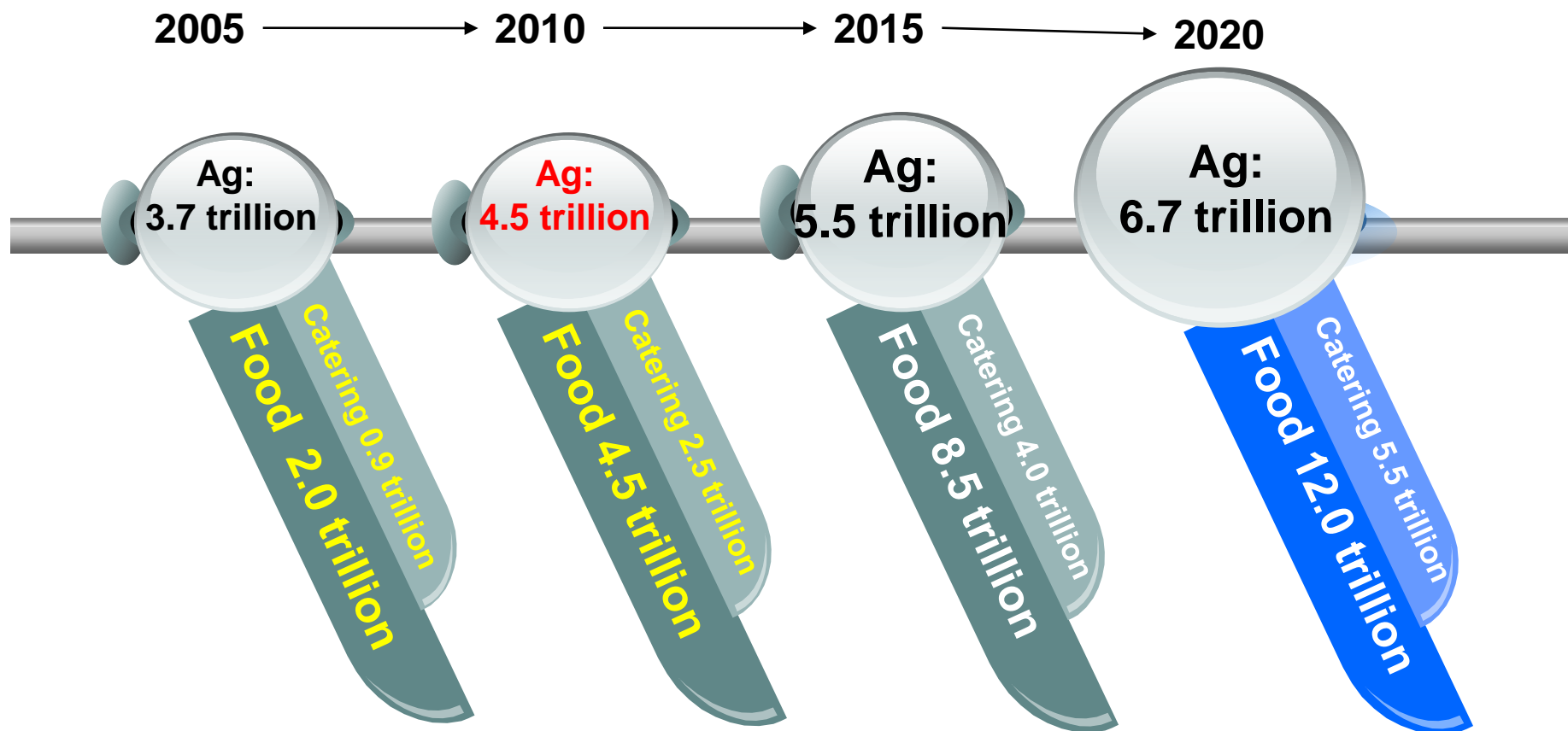
| | |
|------------|-----|
| Shandong: | 678 |
| Henan: | 279 |
| Guangdong: | 236 |
| Jiangsu: | 202 |
| Sichuan: | 183 |
| Liaoning: | 143 |
| Hebei: | 140 |
| Zhejiang: | 131 |

| |
|--------------------|
| Shandong |
| (5368 companies) |
| 1000 / 0.1 billion |
| 70 / 1 billion |
| 4 / 5 billion |
| 2 / 10 billion |

| |
|-------------------|
| Henan |
| (2232 companies) |
| 365 / 0.1 billion |
| 19 / 1 billion |
| ? / 5 billion |
| 2 / 10 billion |



The Rapid Pace of Development of the Chinese Food Industry



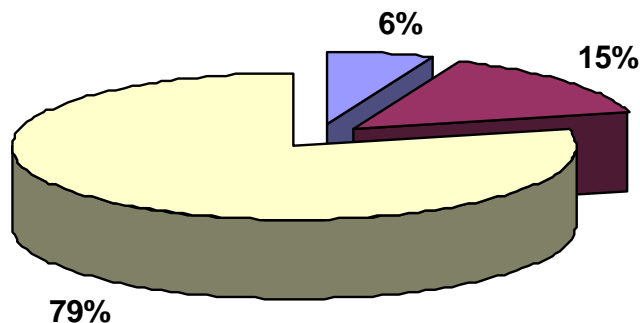
In 2010: Output of the food industry will be equal to that of agriculture



Large and Medium-sized Producers Dominate China's Food Industry

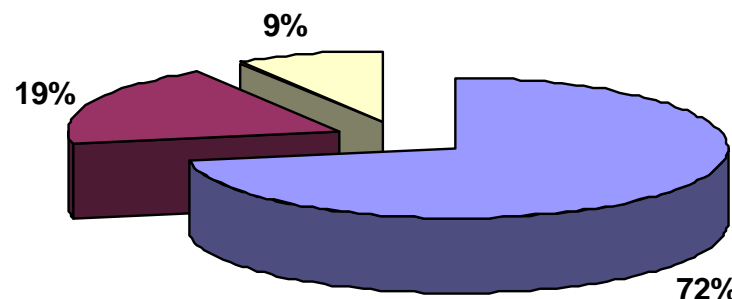
At present, China has **448,000 enterprises** engaged in food production and processing. Among them, **26,000 enterprises of designated scale occupy 72% of the market**, taking the leading role in terms of output and sales revenue

Percentage of food companies based on scale



- Companies of designated scales
- Companies with more than 10 employees
- Small business with less than 10 people

Market shares of food companies





Modern Supermarkets in China

Shanghai



Beijing







Education is the Key Driver to Innovation and Growth of China's Food Industry

- 235 colleges and universities in China have food science programs

| Universities with Food Science undergraduate Program | Universities with Food Science master program | Universities with Food Science doctoral program |
|--|---|---|
| 235 | >100 | 24 |

Data from Jian Chen, President of Jiangnan University

- An annual enrollment of more than 20,000 food science undergraduate students
- Many campuses in China are newly constructed
- Jiangnan University in Wuxi (new campus in 2007) has top and largest program in China. Collaborations and exchange with UC Davis (largest program in USA) since 1980's



Almond Board Student Competitions in China

engages, excites, captures new ideas, spreads the word

- Began in 2004 at Jiangnan University and now is across China
- Perfect format for interaction, education, and dissemination of the taste and health message of Almonds in new product and packaging concepts, tailored to local markets
- Engages and rewards students in ‘creative’ product development
- Excites and Educates – It’s All about Almonds!
- So successful that other organizations have copied the format
- For example, some of the winning product concepts are
 - Funny Almond Roll (2004)



Acknowledgements



In grateful appreciation for assistance received,

Jian Chen, President, Jiangnan University, Wuxi, China

Edward Zhu, CEO, CHIC Group, Shanghai, China

Guangwei Huang and Karen Lapsley, Almond Board of California



Thank You



**Wrap-Up, Discussion
and Q&A**



ABC honors Dr. Shoemaker



UC DAVIS
UNIVERSITY OF CALIFORNIA



*In recognition of your steadfast
commitment and contributions in building
bridges between California almonds and
Asian food science communities.*

December 2010



Wednesday Lunch Speaker



Dr. Ernesto Poza

Thunderbird School of Global Management

The Continuing Spirit of Enterprise: Lessons from Centennial Family Companies

Please check with the registration desk for ticket availability.





Session at 11:40 am:

**Treevix Herbicide, a New
Innovation for Broadleaf
Weed Control in Almonds
from BASF in Grand
Ballroom**



Sessions at 1:40 pm:

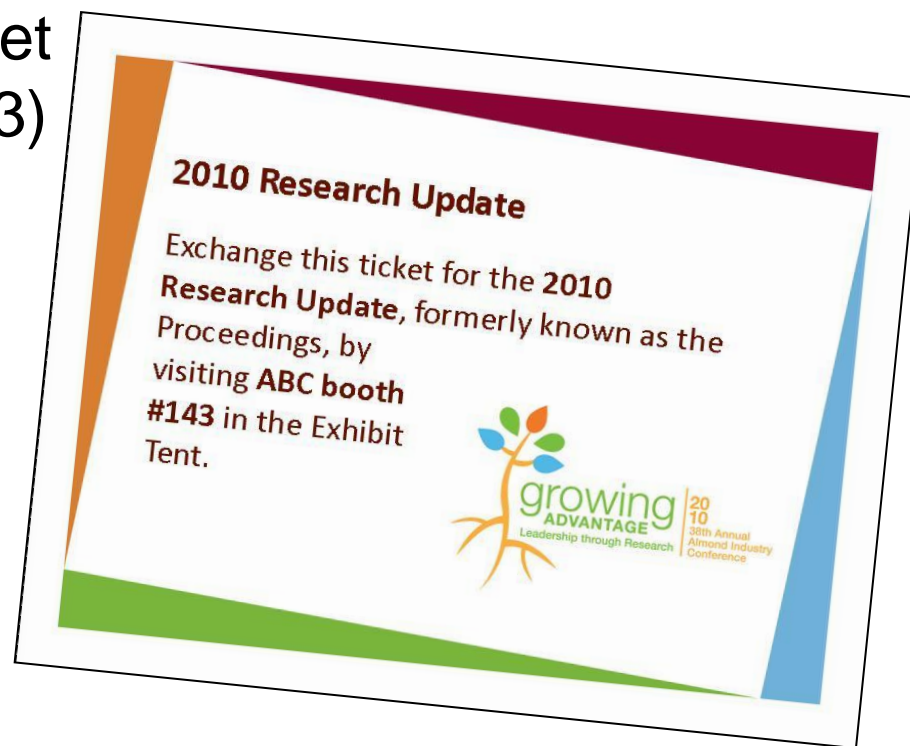
**Coming Down From On
High in Arbor Theater**

**Harvesting: Clean + Safe in
Grand Ballroom**



Research Update

Turn in your **2010 Research Update** ticket at the ABC booth (#143) in the Exhibit Tent for the 2010 Research Update.





Rustler Giveaway

Register to Win the New Holland Rustler!



Fill out your entry form and drop it
at the **Garton Tractor booth #81** or
**SmartCube Packaging System
booth #82** in the Exhibit Hall

Drawing will be held **Thursday, December 9** at
the **12:00 pm luncheon**.

Drawing is open to almond growers. *Growers
must be present to win.*

| | |
|---------|----------------------|
| Name | <input type="text"/> |
| Company | <input type="text"/> |
| Phone | <input type="text"/> |
| Email | <input type="text"/> |



Growers:

Win a New Holland
Rustler from **Garton
Tractor** and
**SmartCube Packaging
System**. Complete
your entry form and
return to booth #81 or
#82.



growing
ADVANTAGE

Leadership through Research

20
10

38th Annual
Almond Industry
Conference