


Taste the Sunshine: Bringing the Benefits of California Almonds to Chinese Consumers

December 10, 2015



A close-up photograph of several green, unripe almonds hanging from a branch with green leaves. The background is blurred, showing more of the tree and some out-of-focus figures of people.

Stacey Humble, Almond Board

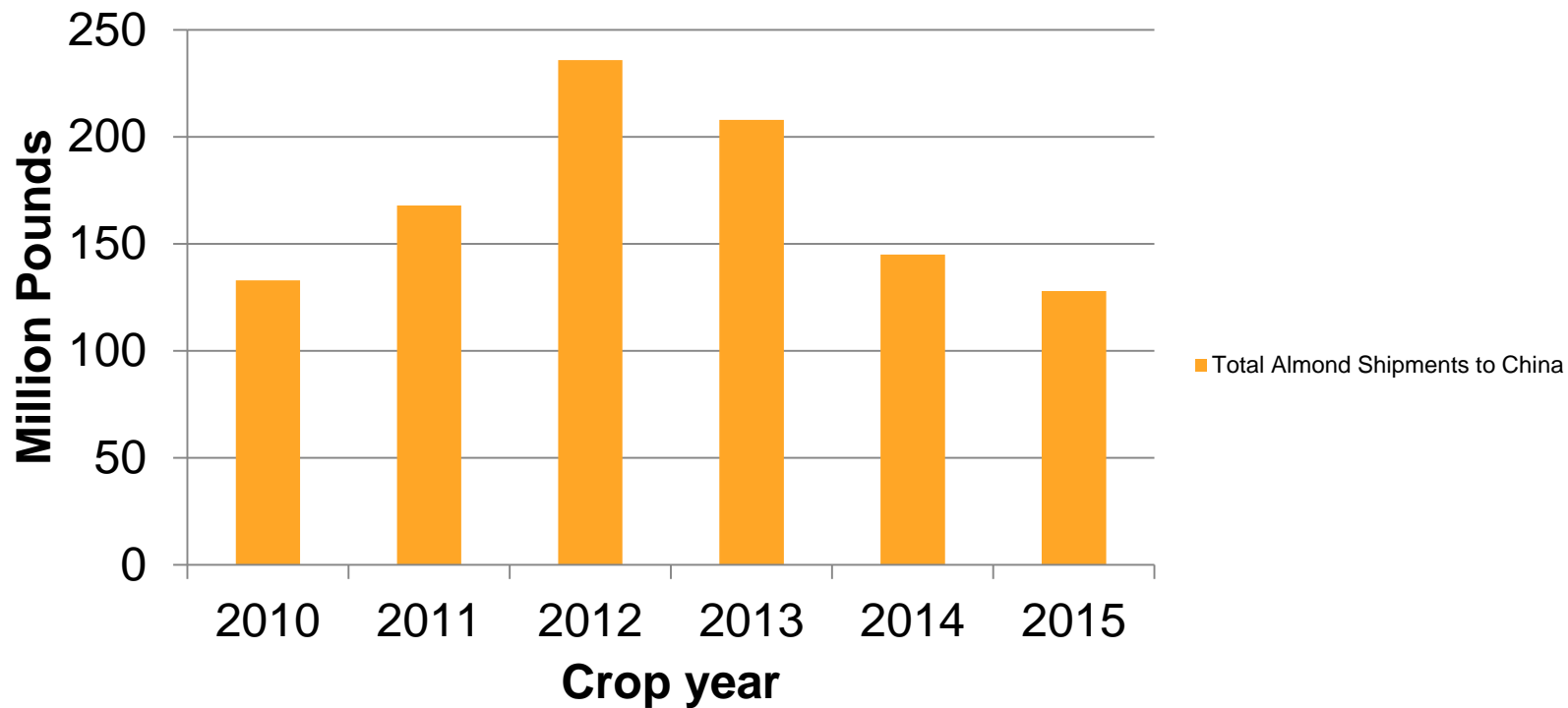
A close-up, frontal view of an elephant's head. The elephant's trunk is prominent in the center, showing deep horizontal and vertical wrinkles. Its eyes are small and dark, positioned on either side of the trunk. The elephant's ears are visible on the right side, showing a similar wrinkled texture. The background is dark and out of focus.

How do we eat
an elephant?



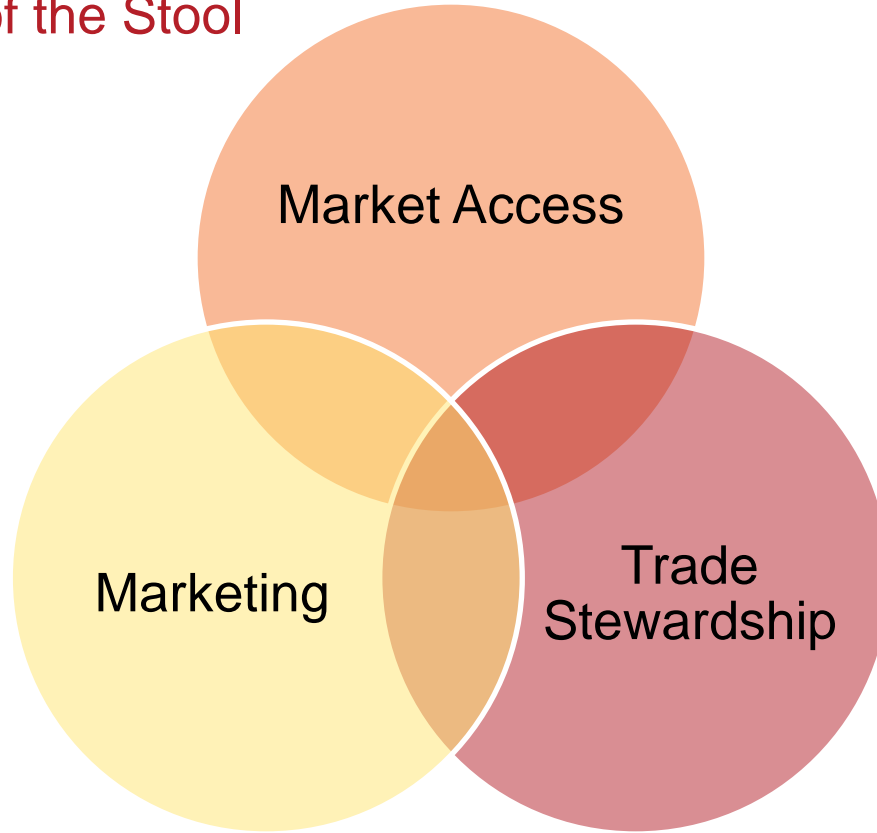
Focus in
geography

Total Almond Shipments to China



Source: Almond Board Position Report

The Three Legs of the Stool



Today

1) China's Economic Reemergence:

Dr. Christopher Bielecki, China Desk Officer, Foreign Agricultural Service

2) China's Appetite for E-Commerce & California Products:

Margaret Wong, President, California Center

3) Building Consumer Awareness for California Almonds:

Becky Sereno, Manager China Program, Almond Board





China's Economic Reemergence: The Rule of Law in China, and it's Effects on U.S. Agricultural Trade

Christopher Bielecki, Ph.D.

China Desk Officer, USDA Foreign Agricultural Service (FAS)
Office of Country and Regional Affairs

December 10, 2015

Almond Board Conference, Sacramento, CA



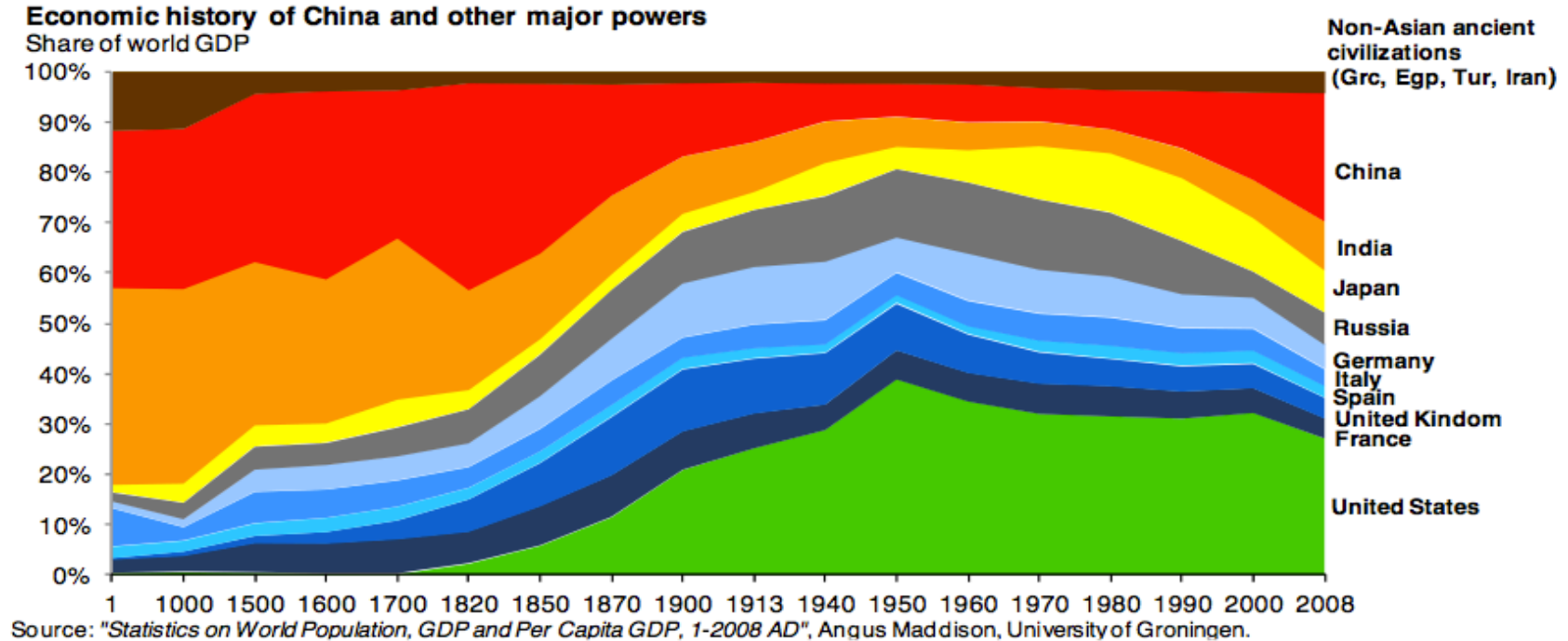
The opinions expressed in this presentation are the author's own and do not reflect the views of the Foreign Agricultural Service, the U.S. Department of Agriculture, or the U.S. Government.

Outline

- China's (Re)emergence
- The Rule of Law in China
- U.S. Agricultural Trade in China, USDA's Strategy and Resources



China's (Re)emergence



China's (Re)emergence

- Population = 1.35 Billion
 - 45,000 babies born each day!
 - 16 million/year



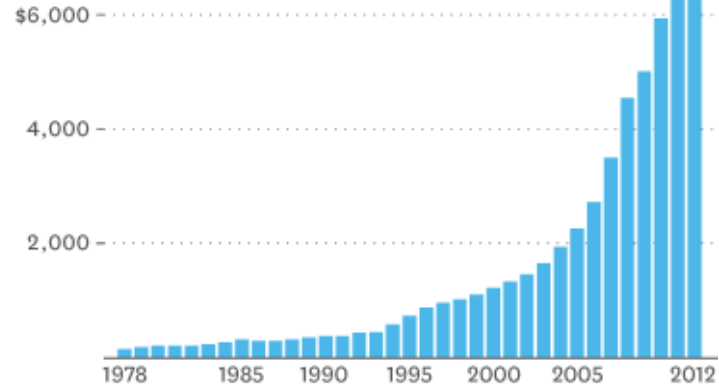
China's (Re)emergence

- Average GDP growth since 1978: 10+%
- Urban rejuvenation
- Mega-projects and infrastructure investments
- Accumulation of foreign exchange reserves

CHINA'S GDP

China's GDP has risen from less than \$150 billion in 1978 to \$8,227 billion in 2012.

BILLIONS OF U.S. DOLLARS



SOURCE: WORLD BANK

HBR.ORG

China's (re)emergence: Enter Xi Jinping

- In pursuit of a new “Great Power Relationship” with the U.S.
- Corruption crackdown: “Hunting tigers and swatting flies”
 - Consolidate power
 - Preserve the legitimacy of CCP and state officials



The Rule of Law in China

- For the UN, the Secretary-General defines the rule of law as “a principle of governance in which all persons, institutions and entities, public and private, including the State itself, are **accountable to laws** that are **publicly** promulgated, **equally enforced** and **independently adjudicated**, and which are consistent with **international human rights norms** and standards. (http://www.unrol.org/article.aspx?article_id=3)

China's "Foreign NGO Management Law"

- Overly broad language would place Cooperators and other NGOs under jurisdiction of the public security bureau, restrict staff numbers, only allow one physical office, and allow for the arrest of staff for "harming national interests."
- China published the 2nd draft in 2015 and allowed comments from the international community.
 - USG submitted comments on June 4, 2015.
 - Points reiterated at the recent Joint Commission on Commerce and Trade (JCCT).
 - The two side were not able to reach a consensus on an outcome at the JCCT.

China's Food Safety Law (FSL)

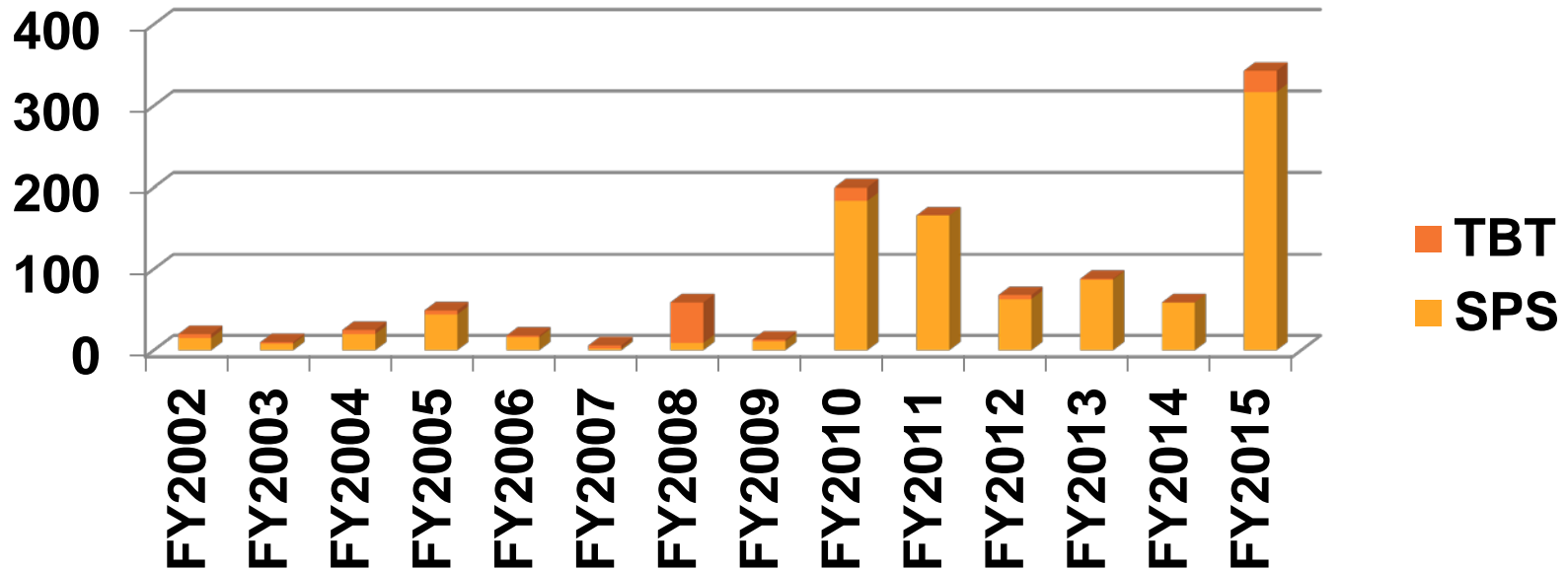
- On October 1, 2015 the FSL officially went into effect.
 - What is it?
 - Expected to serve as the basic legal framework for food safety supervision and management.
 - Why did China pass this law?
 - Domestic scandals and fear of falling behind foreign institutions.
 - Which ministries will implement it?
 - Several, including the China Food and Drug Administration (CFDA) and the General Administration of Quality Supervision, Inspection, and Quarantine (AQSIQ)
 - What does it cover?
 - Many things...Virtually all U.S. food exports

China's Food Safety Law (FSL)

- Several components of the FSL under consideration:
 - “Measures for the Administration of Food Recalls”
 - (CFDA vs AQSIQ)
 - “Administrative Measures for the Supervision of Imported Food Inspection at Port”
 - (administers temporary bans)
 - “Measures for the Administration of Formulated Foods for Special Medical Purposes”
 - Could almonds possibly be considered a food for medicinal purposes?
 - “Measures for the Administration of Supervision of Foods Operation via Internet”
 - E-Commerce crackdown?

China Seeks to Achieve in a Decade What the United States Accomplished in a Century

Number of New Agricultural Technical Barriers to Trade (TBT) and Sanitary and Phytosanitary (SPS) Measures Disseminated by China



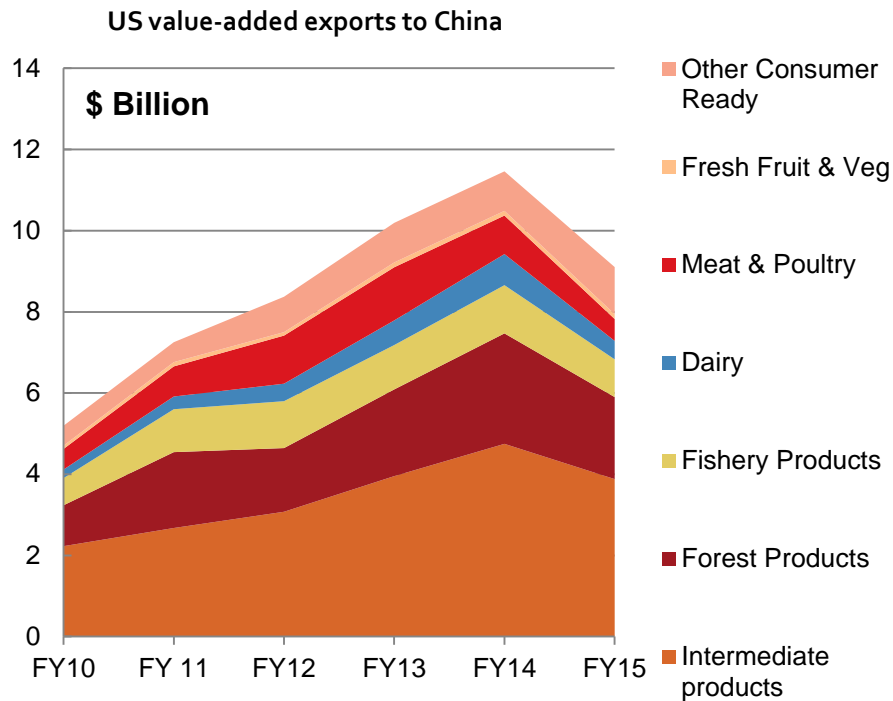
- USDA/FAS used to identify, translate, and assess 20 measures on average each year.
 - 17 SPS measures in FY05 -> 166 SPS measures in FY10 -> 317 SPS measures in FY15
- In FY16 and FY17 FAS will need to:
 - Identify and assess 400 measures per year
 - Finalize 200 USG comments per year with USTR, USDA, EPA, and FDA
(this is equal to the work USDA/FAS does for rest of the world)

China's Selective Interpretations of International Law

- U.S. Poultry: Highly pathogenic avian influenza (HPAI) – Continued ban of U.S. poultry (last HPAI detection on June 17, 2015).
- U.S. Biotech: Protein feeding trials in the safety approval of U.S. biotechnology events.
- U.S. Beef: Country-wide ban due to Bovine Spongiform Encephalopathy (BSE), even though the World Organization for Animal Health (OIE) recognizes the U.S. as having a negligible risk.

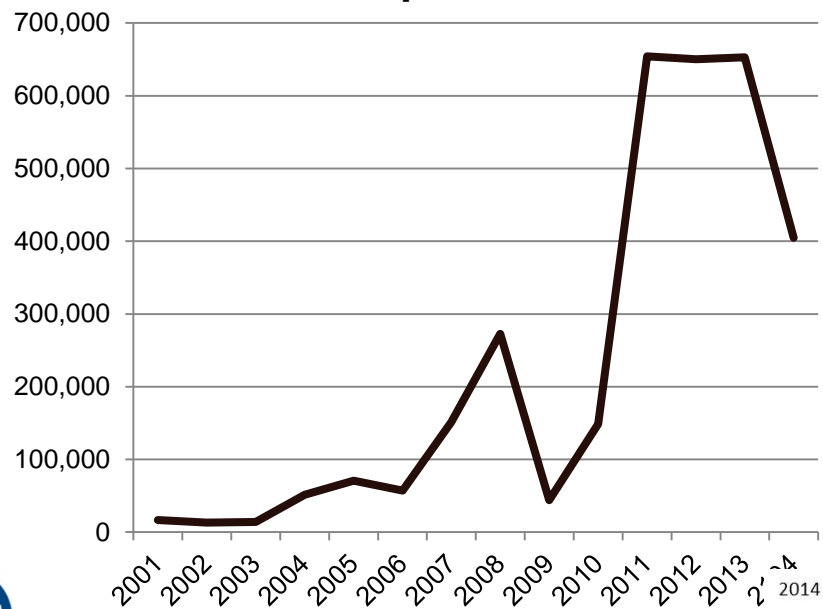
U.S. Agricultural Trade in China

- Expectations vs. Reality
- Is China closing the door to U.S. agricultural exports?

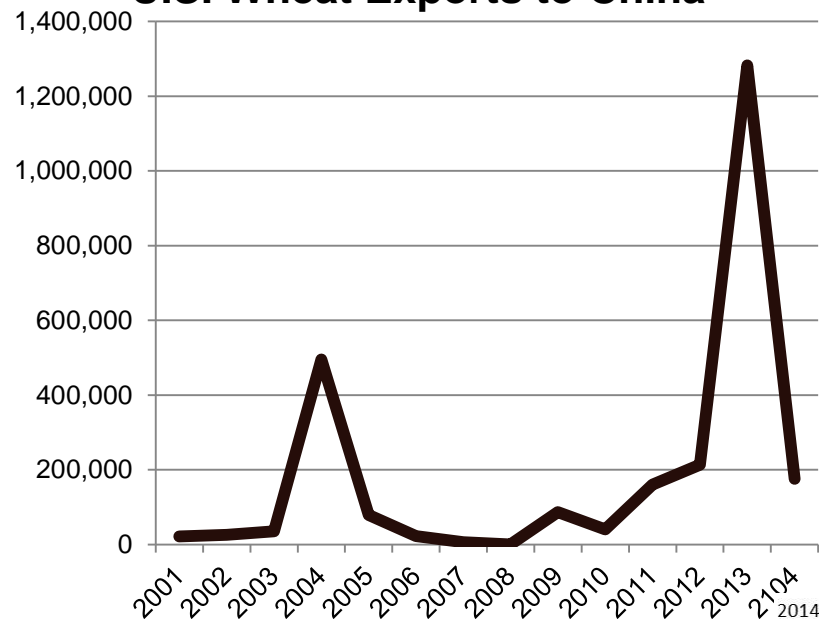


The Closing Door...

U.S. Pork Exports to China

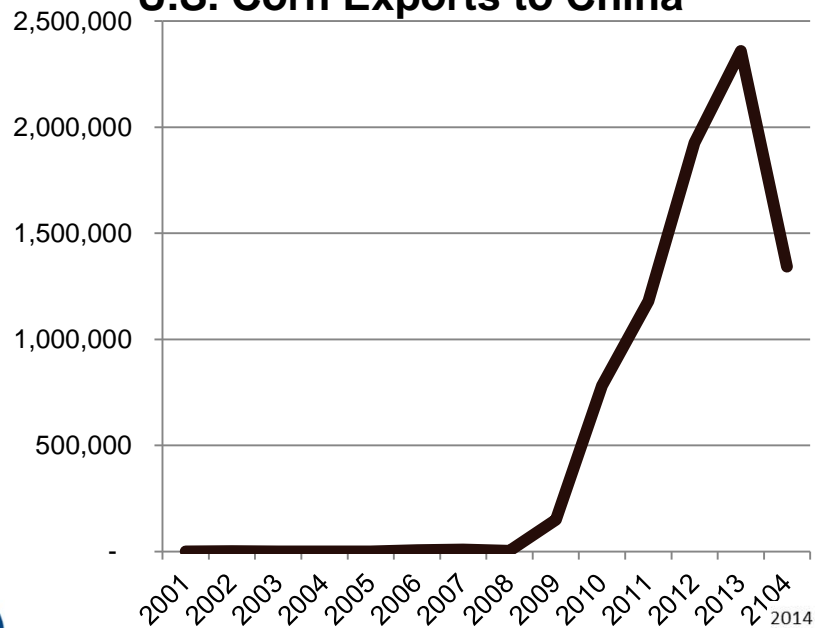


U.S. Wheat Exports to China

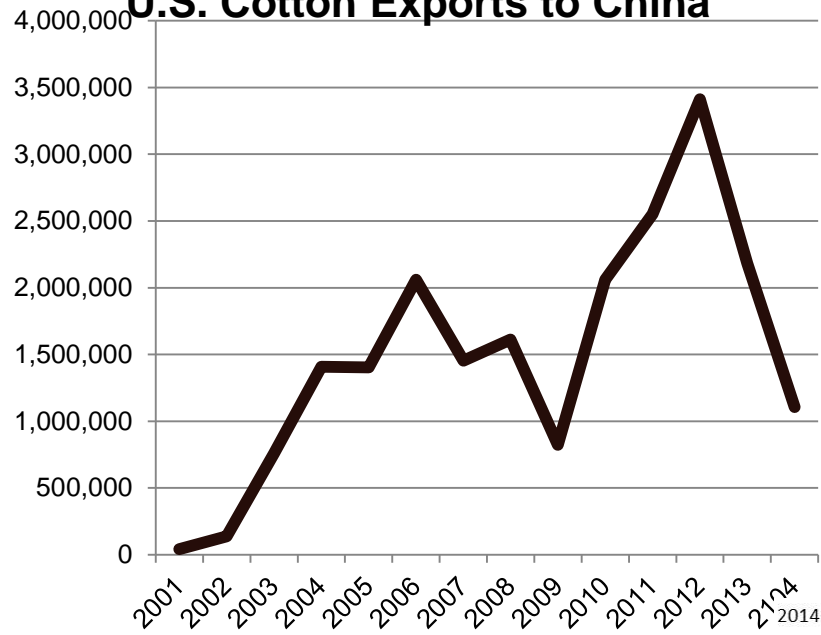


It Continues...

U.S. Corn Exports to China



U.S. Cotton Exports to China



Despite some bad news, the reality is:

- China = A growing population and middle class
- U.S. agricultural products are still regarded as the gold standard
 - As a specialty crop = Almonds should remain in high demand.
- The Chinese government is, generally, acting in good faith and playing catch-up (no goldilocks scenario)

USDA/FAS Strategy in China

1. Break down trade barriers
2. Promote U.S. agricultural products
3. Build capacity

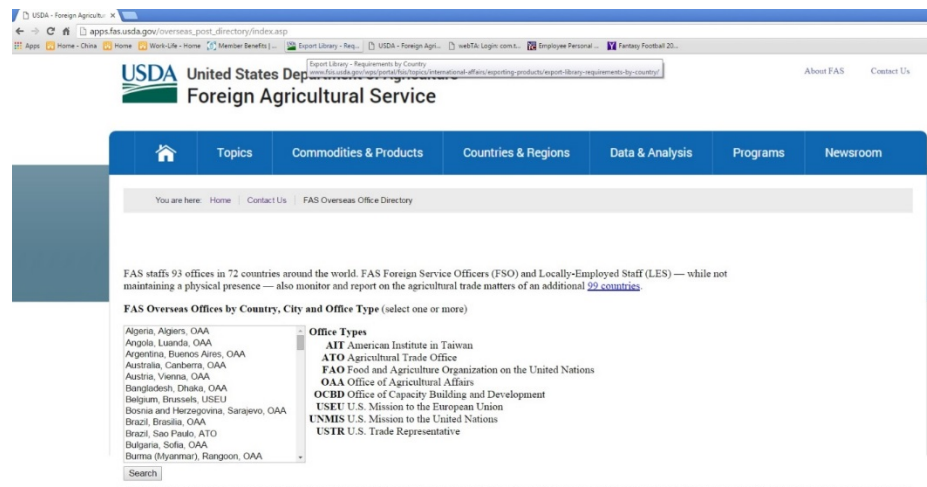


Conclusions

- Tough road lies ahead.
- Don't walk down the road alone.
- You may meet interesting people along the way.
- The destination will be worth it.

FAS Contact Information

- For general/policy questions:
 - ChinaDesk@fas.usda.gov
- To contact FAS staff in China directly, use the search tool at fas.usda.gov
→



Margaret Wong, California Center



Maximizing Opportunities for Almonds in China



Margaret Wong

President

Golden California Inc.

McWong International, Inc.

Contents

- 🌰 **China Almond Market**
- 🌰 **China E-commerce**
- 🌰 **China Cross-border E-commerce**
- 🌰 **California Mall**
- 🌰 **California Center**
- 🌰 **Opportunities**

China Almond Market

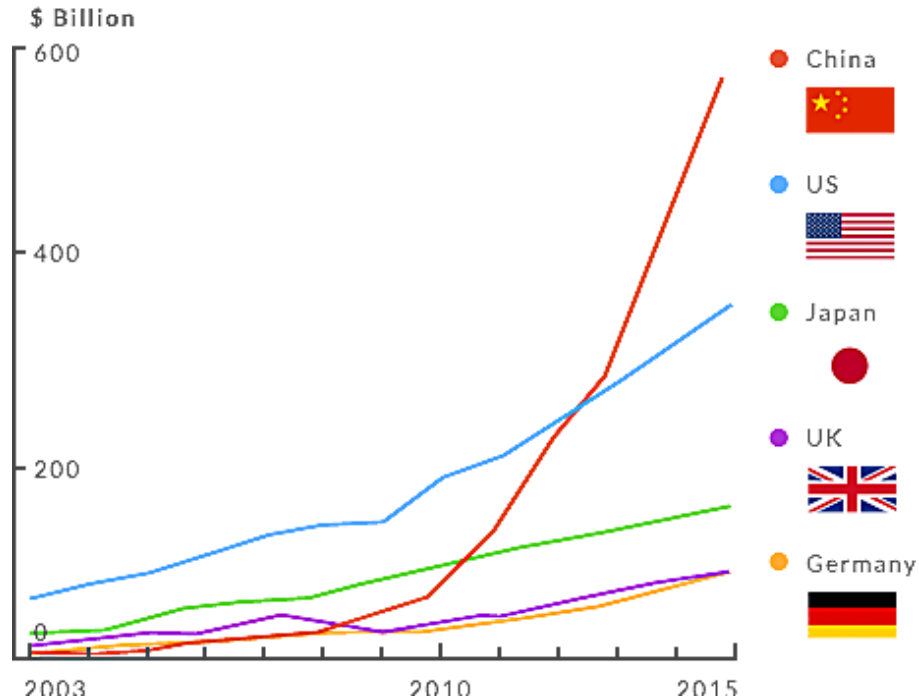
- 🌰 China cultivation still small but increases fast with government incentives
- 🌰 Most almond products in China are processed and packaged in China
- 🌰 Most almond imports are in raw bulk form
- 🌰 Affluent and young consumers are more discerning on the buying choices
- 🌰 Growing trend on imported retail products
- 🌰 Growing trend on online shopping

China Almond Market Trends

- **Desire for value-added products (convenience, flavor, nutrition)**
 - Almond milk, exotic and unique flavors, almond butter, almond oil, almond-based nutrition bar, modern and convenient packaging, etc.
- **Desire for California-processed and branded retail products (food safety, lifestyle)**
 - California is well regarded for high quality and diversity
 - USA processed and packaged (genuine and safe)
 - Authentic flavoring
 - Sold in California and component of healthy and vivid lifestyle

China E-commerce

Annual Online Retail Revenue



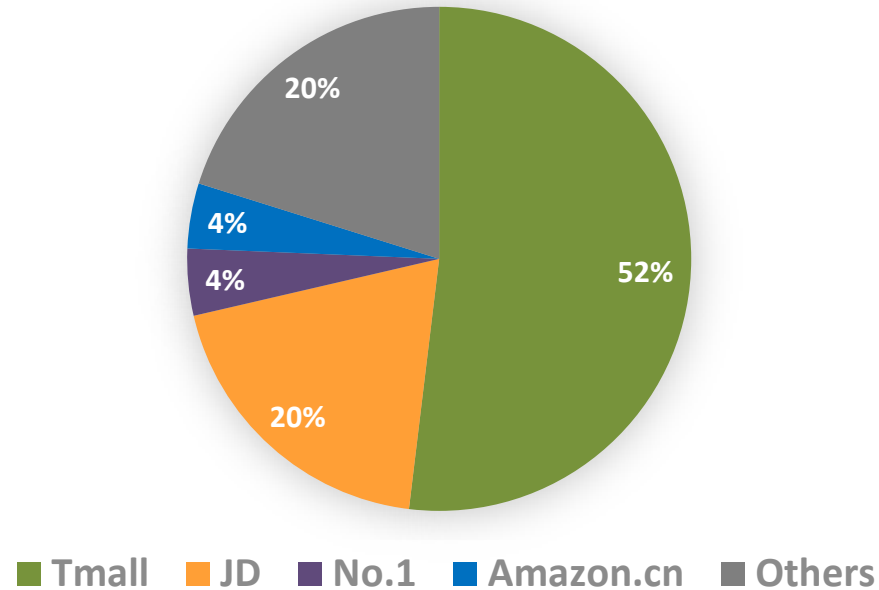
Source:
McKinsey 2013
KPMG 2014

China E-commerce

- 🌰 **World's biggest national e-commerce market**
- 🌰 **Chinese shoppers spent US\$450 billion online in 2014, a 50% increase from 2013 (KPMG 2014)**
- 🌰 **Rising middle-class: ~360 millions in 2016**
- 🌰 **Internet, mobile devices, high supermarket costs, crowded stores, traffic, weather, etc.**
- 🌰 **Fast growing nationwide logistics providers**
- 🌰 **Leading online-retail sites: Tmall (Alibaba), JD (NASDAQ), No.1 Store (Walmart), Amazon (China)**

China E-commerce

China's ~200 Million Active Online Shoppers



Source:
Ebrun.com 2014

Tmall Top Almond Sellers (2015.11)



November # of orders:

310,000

35,000

November Revenue:

USD 2M

USD 289K

Unit Price:

USD 6.47/lb

USD 7.98/lb

China Cross-border E-commerce

天猫国际 TMALL GLOBAL



京东全球购
JD Worldwide

Must be foreign sellers and imported retail products
Some of current US stores on China cross-border online portals:



Unilever



Plow & Hearth®



China Cross-border E-commerce Taxes

- ☛ Parcel Tax – China Customs
- ☛ Applies to mail or carry a parcel of goods into China
- ☛ Also applies to goods delivered from China Free Trade Zones
- ☛ Only for personal use at reasonable quantity
- ☛ No Value-Added Tax (VAT) (conventional import at 17%)
- ☛ No duty if package value < \$80
- ☛ If package value > \$80, need to pay duty at the following rates:
 - ☛ 10%: publications, jewelry, food, and non-alcoholic beverages
 - ☛ 20%: textile, electronics, bicycles, watches, and clocks
 - ☛ 30%: golf equipment, high-end watches (\$1,600 or above)
 - ☛ 50%: cigarettes, alcoholic beverages, cosmetics.

China Cross-border E-commerce Logistics

- California suppliers set up or join a store on approved cross-border online retail portals
- Once orders are placed, there are three ways to fulfill:
 - Option 1: California suppliers ocean freight large quantity of products to store's bonded warehouses in China Free Zones (many choices across China), store's logistic team/partner will pick-n-pack, clear customs, and deliver order.
 - Option 2: store forward orders to California suppliers, suppliers ship orders to a logistic service provider (one in LA), the service provider will air mail to China shoppers and clear customs.
 - Option 3: store forward orders to California suppliers, suppliers air mail orders to China shoppers and clear customs.

China Cross-border E-commerce Logistics



California Mall

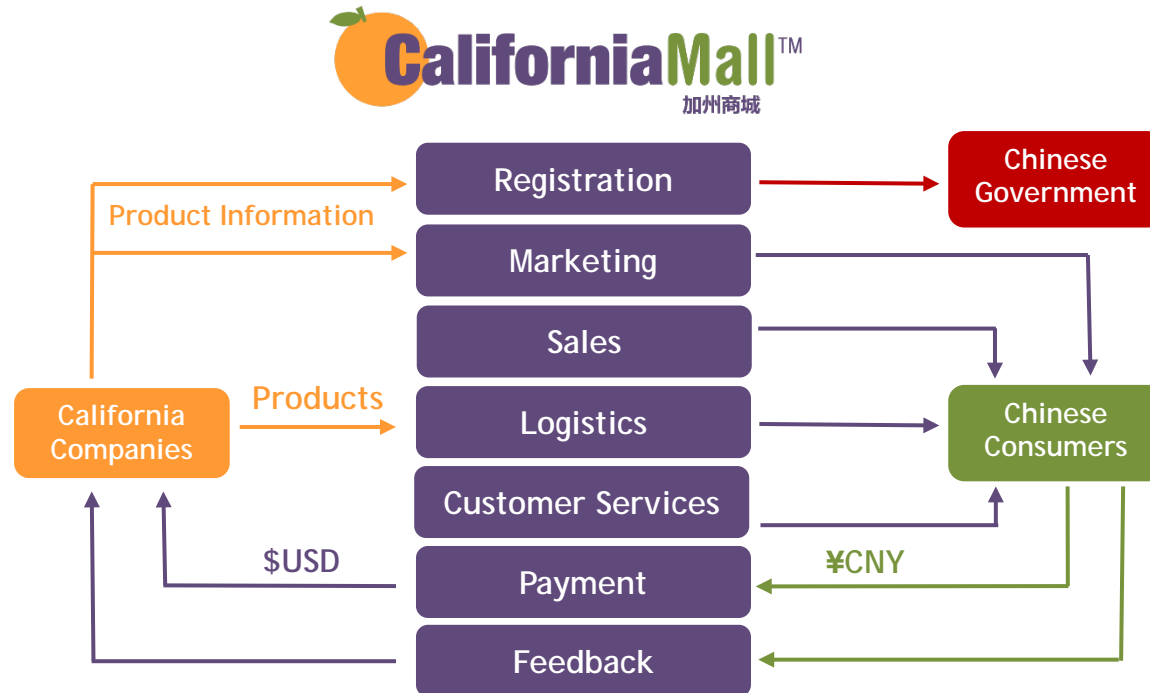


California Mall is a cross-border e-commerce platform of California Center that helps California companies sell directly to Chinese consumers via leading online retail portals in China, such as Tmall Global and JD Worldwide.

California Mall

- Helps California companies benefit from China's growing e-commerce.
- Helps California companies enjoy China's growing demand for imported products and reduced taxes.
- Understand California producers and products to help position, brand, market, sell, and protect them in China.
- Marketing power to attract shoppers under the brand name "California".
- Supported by governments and industries in US and China.
- One-stop services to help companies sell directly to China consumers.

California Mall Process



California Mall Process

California Suppliers



California Center

- California Center is a business platform operated by Golden California Inc.
- A Sacramento company, branches in Shanghai and Chongqing, China.
- California Center is a “Storefront” and “Headquarter” in China for California companies and organizations.



California Center Services

- ☛ Showcase information, products, and services in our physical centers and on our website and social media in China.
- ☛ Direct sell California products on our e-commerce store, CaliforniaMall, to Chinese online shoppers.
- ☛ Offline promotional events and activities in China.
- ☛ Facilitate wholesale exports to China.
- ☛ Chinese California Club membership and subscription.
- ☛ Accelerate specific China strategies with customized services on both government and business relationship, partnership, investment, legal, office and HR administration, and others.

Inception

California Center was originally named during a Signing Ceremony in China by Governor Jerry Brown with Party Secretary Luo Zhijun of Jiangsu Province.



April 14th, 2013, Margaret Wong (second to the left) witnessed the MOU signing in Nanjing, China to support opening California Center in Jiangsu Province.

Government Support

Since its inception, a large bi-partisan list of public officials from the federal, state, and local level have expressed support for California Center.



Recent Agreement

California Center was also recently named in state supported MOU between Governor Brown and Party Secretary Wang Donming of Sichuan Province (October 2015) to establish our center in Chengdu next year.



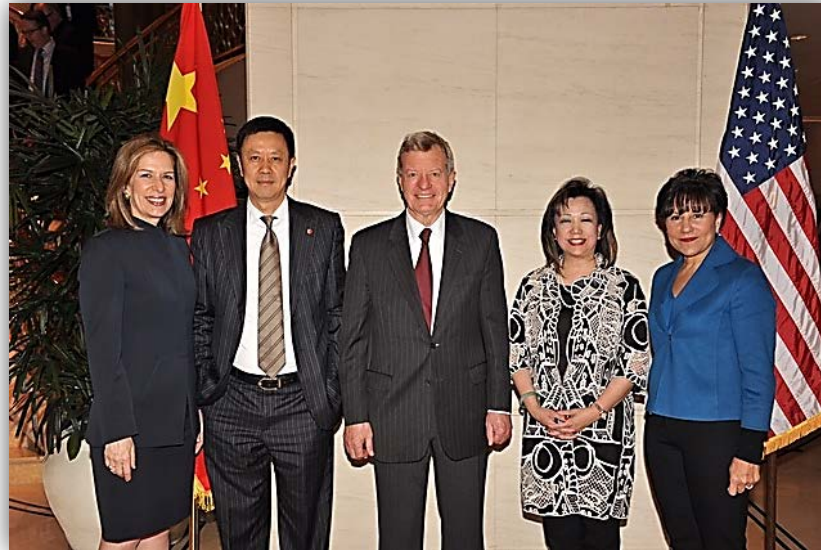
Governmental Activities

Margaret Wong presents to Jiangsu Delegation visiting California between Governor Brown and Party Secretary Luo Zhijun and business roundtable discussions. (Stanford Mansion in California – October, 2015)



Governmental Activities

April 2015, Margaret Wong (R2) joins Commerce Secretary Pritzker (R1), Ambassador Baucus (C), Deputy Energy Secretary Sherwood-Randall (L1) and other officials on 24-American company delegation to China.



Grand Opening



Grand opening of California Center's Shanghai facility was held on May 30th, 2014, joined by California Go-Biz office, State Legislature, Cal Asian Chamber of Commerce, LA County Economic Development Corp, UC Davis, Yuba City, and other public and industry leaders from California.

China Showrooms

Our physical centers in China showcase information, products, and services, host visitors, and hold events that allow customers and interested parties in China to see, touch, taste, and experience what California offers.



Opportunities in China – Offline Promotion

- 🌰 Promotion and sales sites, such as metro station pop-up storefronts and mobile booths
- 🌰 Events, trade shows and trade missions
- 🌰 California wine and food promotion
- 🌰 Local business partners promotion
- 🌰 Sports, fitness, health, wellness promotion

Opportunities in China – Online E-commerce

- 🥜 Online stores – direct sales to shoppers
- 🥜 California Club membership – subscription, presale
- 🥜 Mobile app marketing and sales
 - 🥜 WeChat – China's mostly used social media, 500M active users.
- 🥜 Online and app push sales
- 🥜 Food traceability
- 🥜 Direct sale/presale – farm to consumer

Opportunities in China – Innovative Strategies

- 🌰 Value-added products
- 🌰 Flavored specialty almonds
- 🌰 Convenient/innovative packaging
- 🌰 Almond milk/drinks
- 🌰 California branding
- 🌰 Push sales directly to consumers
- 🌰 High-tech marketing and sales



Connecting California and China!

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**Becky Sereno,
Almond Board**



Building Consumer Awareness for California Almonds



Our China Journey



- Launched Young at Heart Campaign and first advertising in the market
- Reputation crisis in media starts due to use of same name as Chinese apricot kernels “xing ren”

2012

- Recover from negative media coverage and focus on new name “badanmu”
- First ad effectiveness study shows positive results in liking and awareness
- Industry standard with new names for almonds took effect; confusion with phasing in packaging with different names ensues and brand owners and retailers targeted by professional complainants

2013

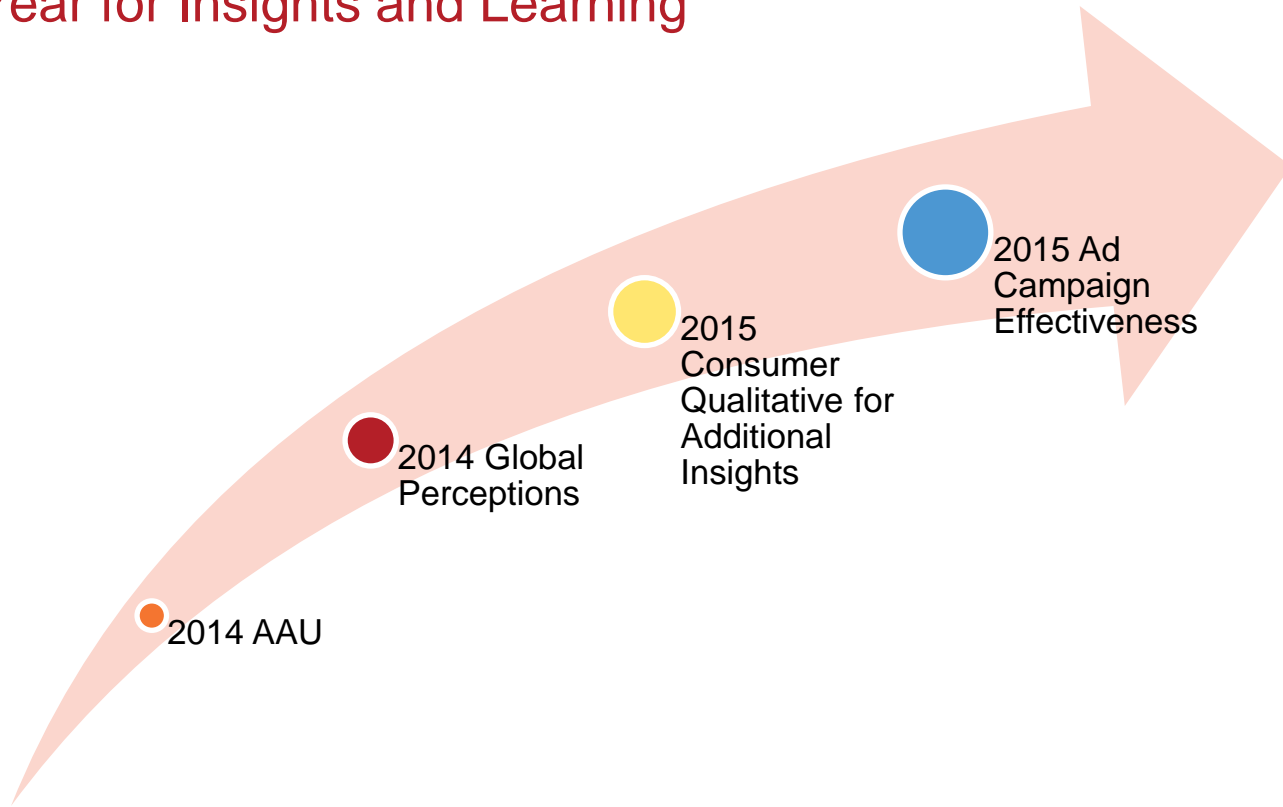
2014

- Updates on advertising law are imminent.
- Trade still lukewarm about almonds due to legal scrutiny, implications of name change and pricing
- Hired Edelman as PR agency
- Ad effectiveness points to wear-out

2015

- Strong growth in campaign awareness reaches height of 44%
- Shipments begin to decline due to: tightening anti-corruption laws, price increases, remaining confusion on name usage and standards enforcement

A Great Year for Insights and Learning



Our Target Consumer

- Behaviors, almond benefits, and usage are all consistent across quantitative surveys and the consumer focus groups
- The target is defined as:
 - Female, 25-45 years old
 - Agree to one of the following statements:
 - I am eating more healthy food than I have in the past
 - I pay attention to the nutritional content of food
 - In order to be beautiful, having a healthy body is really important
 - CNRS measures as: 22 million Chinese consumers





What's in a name?

The Chinese Name for Almond

Apricot Kernel

杏仁

Xing Ren

First name given to Almond when it originally came to China from the USA. Later distinguished for consumer and trade understanding as “Big American” or “Big”.

Since 2013, two names have entered commercial channels after the clarification that Almond is a different product from Apricot Kernel.

Flat Peach Kernel

扁桃仁

Bian Tao Ren

A botanical name used by plant classification experts, unknown to consumers.

Badanmu

巴旦木

Ba Dan Mu

Name used in Xinjiang Province to refer to the Almond product grown there that is similar to Almond grown in California, USA.

Apricot Kernel

杏仁

≠

Almond

≠

Peach Kernel

≠

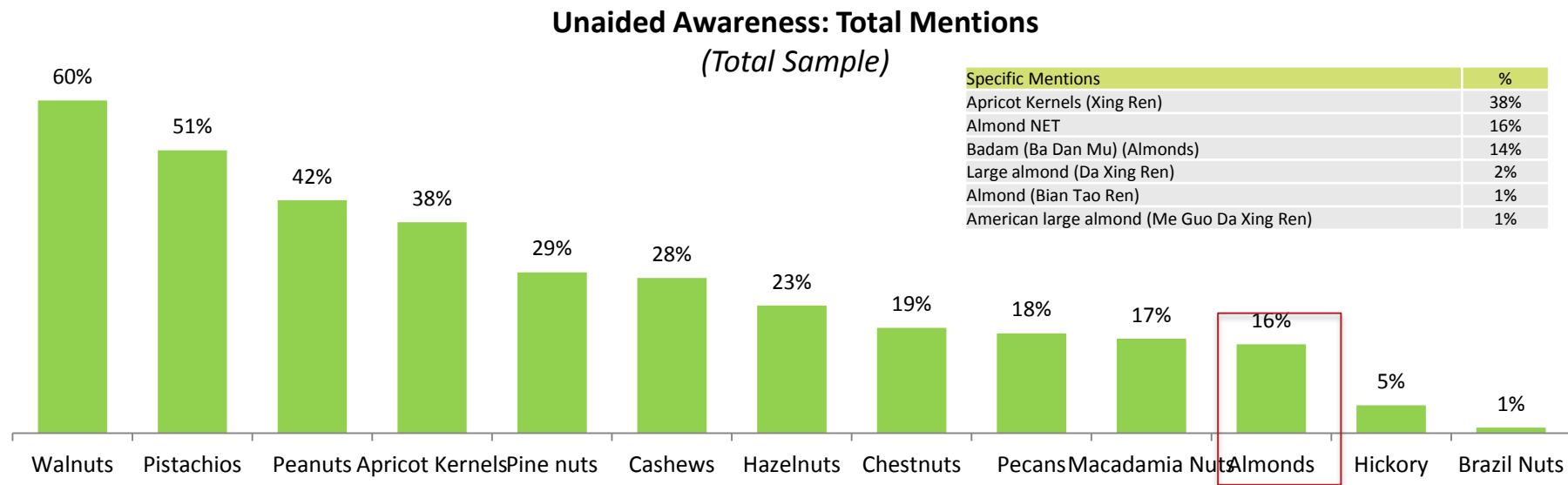
巴旦木

≠

桃仁

Awareness: Unaided (Total Mentions)

Almonds were only mentioned by 16% of Chinese consumers on an unaided basis, while apricot kernels were the fourth most mentioned nut at 38%



Size is the main differentiator when referring to Almonds or Apricot Kernels

- When showing both products together, size is the main difference perceived when they try to distinguish them. They are referred as “big almond” or “small almond”
 - However, this does not necessarily certify the origin of the nut, e.g. American almond



- **Xing Ren/ 杏仁**
- **Da Xing Ren/ 大杏仁**
- **American Xing Ren/ 美国大杏仁**
- **Sweet Xing Ren/ 甜杏仁**
- **Badam/ Ba Dan Mu/ 巴旦木** (skew to a few)
- **Bian Tao Ren/ 扁桃仁**



- **Xing Ren/ 杏仁**
- **Badam/ Ba Dan Mu/ 巴旦木** (some have the perception that Ba Dan Mu is in-shell)



- **Small Xing Ren Xiao Xing Ren/ 小杏仁**
- **Local Xing Ren/ 国产杏仁**



- **Xing Ren/ 杏仁**

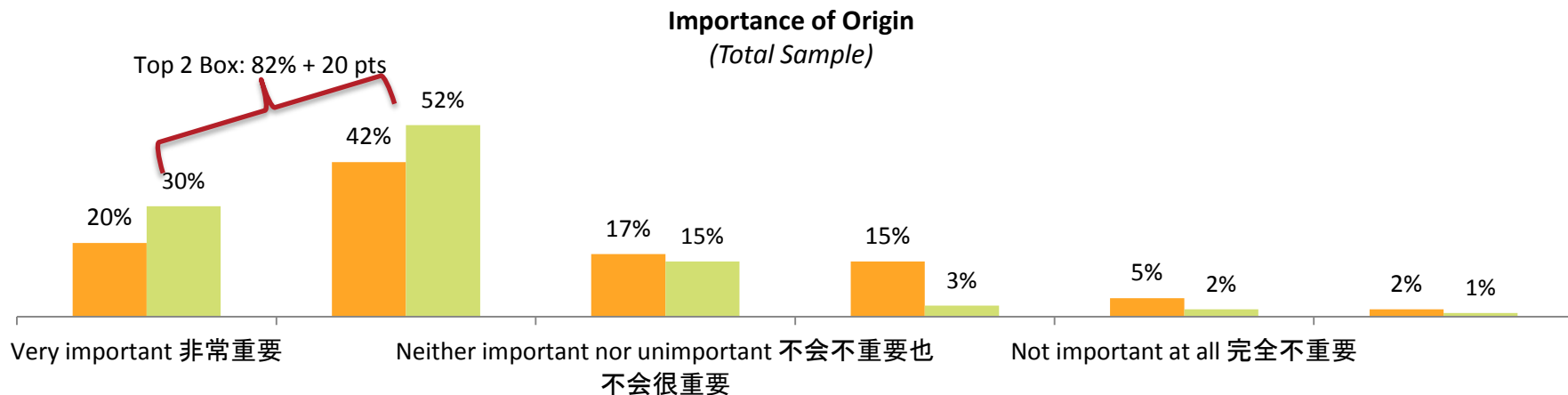
**Name used
by
Consumers**



Importance of Origin

Almond Origin: Importance of Origin

- Respondents placed a lot more importance on the origin of their almonds than two years ago. Over 80% stated that the origin of almonds is somewhat or very important to their purchase decision, up from 62% in 2012.



California has incredible equities as a brand

- Overwhelmingly “Hollywood” style associations emanate from California

“California has a great image of being sunny and no pollution. Therefore you are attracted to it.”

Trend Setters

“If it is from California it is imported and premium.”

Trend Setters

“California has the sun shining on it all year long. Badam will bring you health. It is rich in sunshine.”

Health Seekers



Unique Position for Almonds



How are almonds different versus all nuts?

- **Clean** – doesn't leave residue or oil on your hands
 - **Portable** - Easy to take with you and without mess (shelled)
 - **Less oily** – in comparison to other nuts
 - **Less fattening** – perceived as dryer than other nuts and therefore less fattening
 - **Don't worry** that they will lose control and eat too many in comparison to chips or peanuts
 - Linked to **chocolate**
-
- But, not currently linked to a health benefit outside of those attributed to all nuts

Both “Skin & Beauty” and “Heart Health” make almonds stand out in the nut category.
The “Skin & Beauty” message has the highest relevance

	Skin and Beauty	Heart Health	Weight Management	Energy and Vitality
Overall appeal	😊	😊	😐	😐
Relevance	😊	😐	😐	😐
Uniqueness of Almond	😊	😊	😞	😞
Driving Consumption	😊	😊	😐	😞

Skin and Beauty message caught consumers' attention

The approach of Skin and Beauty resonates well with consumer's goals and ambitions and drives engagement

- Across age groups, good skin is always what consumers aspire to have
- The statement of combating harmful stress and pollution is highly relevant with consumers' concern from air pollution, which is a major issue that Chinese consumers deal with

The concept brings new knowledge to consumers about almonds

- The almonds' benefits, "combating pollution" and "antioxidants" are very new to all consumers and sound very appealing
- Although there is some awareness of Almond's skin-related benefit, e.g. whitening, good for skin overall, this statement gives consumers further understanding or the reasons why - vitamin E, micronutrients, antioxidants

It is considered a natural way to achieve good skin, which makes it possible to drive almond consumption frequency

- The statement gives consumers a specific reason to consume almonds consciously, e.g. while they might keep the similar amount of nuts category overall, there is more intension to consume almonds
- The antioxidant vitamin E contained in Almonds, gives those who are currently taking vitamin E supplements a more natural replacement for these supplements. Supplements are viewed as chemicals, while almond is a natural version of a supplement

China Program Communication Needs

1

Establish visual
differentiation
between
almonds and
apricot kernels

2

Elevate
California

3

Clear and
consistent naming
of almonds
across all
consumer
touch points

4

Focus afternoon
(3 pm) snacking
occasion with
almond benefit on
skin and beauty

How do we do it?



Research in Action

China Program Crop Year 14-15



New Campaign: Taste The Sunshine



Media platforms

Wide Coverage Video Platforms



Music



Life information



Outdoor: Elevators, Bus, Metro



Travel



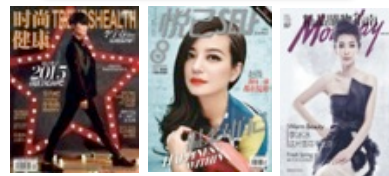
Mom & Baby



Fashion & Shopping



Magazines



Chinese Media Harvest Visit 2015



Special thanks to Jim Jasper and the whole Stewart & Jasper Team!

Media Results: Spanning Social and Print



New Outreach with Industry

1. Repeated requests from Chinese stakeholders to use Almond Board logo over the years
2. Potential disconnect with broad based communications about California and no labeling or distinction of California on pack
3. Leverage existing retail technology in the market

照亮阳光



生长于加州

Online Content Page



加州巴旦木 尝味阳光

加州巴旦木生长在美国加州中部山谷，一个极为良好的农业种植区，夏季炎热干旱，冬季凉爽多雨。适宜的气候再加上种植者们的热情，为巴旦木创造了理想的生长环境，并生产出世界上最好的巴旦木。



美国杏仁被称为 加州巴旦木 的原因

中国于上世纪70年代开始从美国进口Almond，当时中文里没有Almond 一词的恰当解释，鉴于Almond与中国杏仁外形相似而被称作“杏仁”、或“大杏仁”。为避免误导，并为消费者提供更多信息，多年前，中国行业开始使用“加州巴旦木”，用以与中国杏仁的区别。



加州巴旦木

人体的身体内部
整个人看上去就
保证身体获得

加州巴旦木

加州巴旦木是许多营养元素的极值
E等人体所需的营养元素。天然维
灿烂的阳光，是一种人见人爱、



著名营养 顾中

“

我们人体每时每刻
的氧化和抗氧化
吸系统等组织器官
及儿茶素、表儿茶
和西兰花、绿茶中

加州巴旦木

就健康零食的便捷性而言
便于携带，而且没有任何



食用小建议：不论早
随时随

加州巴旦木

营养丰富的加州巴旦木无需任
养身体的完美零食之选。



无需
全球超过
的巴旦木产自加州，
销往全球的90多个国家

巴旦木应用广泛

苹果
旅行

蜂蜜
家

满足日常

加州巴旦木

滋养在阳光之地，富含天然
食之选，也代表着加州健康



80%
全球超过
的巴旦木产自加州，
销往全球的90多个国家

近80%的加州巴旦木农场
为家庭所有，而大部分已
是第三或四代种植者。

Almond Board of Calif
已资助了300多个有关
研究项目，投资超过2

每一把加州巴旦木
提供7.7毫克的维生素E
=每日建议摄入量参考值的

55%
健康阳光的生活，从每天一把加州巴旦木开始！

健康阳光的生活，从每天一把加州巴旦木开始！

加州巴旦木美味升级

买来的巴旦木口味会不会已经不能满足你的味蕾？其实简单的调味品
就可以平添风味，快来创造专属自己的美味吧！

芝麻+蜂糖 秋季零食也滋润

半杯加州巴旦木、1汤匙蜂蜜、10克芝麻籽，将巴旦木与蜂蜜一起
放入不粘锅。搅拌均匀，文火加热1~2分钟，不时搅拌直至粘稠状
态。加入芝麻并搅拌，令芝麻粒包裹在巴旦木表层。关火，冷却。

加州巴旦木满满的维生素E，极富抗氧化效果，可以帮助你的肌肤抵
御自由基的侵害。



关注官方微信



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官方微博 weibo.com/californiaalmonds

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抗氧化剂

VE →

有助于中和有害的自由基
抵御对皮肤细胞的侵害



加州巴旦木无需任何处理，又便
于保存、携带与分享，可以随时
随地享用的健康零食。



california
almonds™
Almond Board of California

To Wrap Up

- Almond Board has learned a lot more about our Chinese consumer and is focused appropriately in the market. We'll continue gathering annual consumer insights as the market and consumers change so quickly.
- Our new campaign messaging is poised to bring greater clarity to consumers about almonds' identity, including origin and distinguishing benefit of Vitamin E.
- China is a large market, but it is less daunting with targeted strategy and efforts.
- Chinese consumers have a large appetite to consume and especially California products.
- China can be a complicated market and definitely takes vigilance, but business can be done and success can be achieved.

Thank You! Xie Xie!

