

CHOCOLATE FORTUNES



The Battle for the Hearts, Minds, and
Wallets of China's Consumers

LAWRENCE L. ALLEN

Foreword by Dr. Angel Cabrera, President, Thunderbird School of Global Management

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*This book is dedicated to my parents, Louis and Kaleope Allen,
whose 1980 trip to China inspired me to find my career path,
and whose love and devotion to their children is the foundation
of all that is good and meaningful in my life.*

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Trademarked terms in *Chocolate Fortunes*:

Almond Roca	Kjeldsens Butter Cookies
Baby Ruth	Konabar
Blue Ribband	Lindt
BreathSavers	M&Ms
Butterfinger	Mar-O-Bar
Cadbury Creme Eggs	Mars Bar
Cadbury Dairy Milk	McDonald's
Cadbury Dairy Milk Fruit and Nut	Mercedes-Benz
Cadbury Roses	Milk Tray
Cadbury Dairy Milk Whole Nut	Milky Way
Cailler	Mr. Goodbar
Carnation	Nescafé
Certs	Nescafé "1 + 2 sachet pack"
Cheerios	Nestlé Cailler Table Bomb
Chunky	Nestlé Celebration
CoffeeMate	Nestlé China Crunch
Coke	Nestlé Crunch
Crackle	Nestlé Infant Food
Crispy Delicious Rice	Nestlé Milk Wafer
Dannon	Nestlé Wafer
Dentyne	Nutella
Doublemint	Oh Henry!
Dove	Oreo
Dove Bar	Oreo Chocolate Wafer
Dove Promises	PayDay
Dovebar ice cream	Pepsi
Dr. Pepper	Perrier
Dreyer's	Perugina's Baci Chocolate
Éclairs	Purina Friskies
Ethel M	QueQiao
Ferrero Rocher	Raider bar
Future Cola	Red October
Halls	Reese's NutRageous
Hershey's	Reese's Peanut Butter Cups
Hershey's Bar with Almonds	Ritter Sport
Hershey's Kisses	Schwepes
Hershey's Kisses with Almonds	Smarties
Hershey's Nuggets	Snapple
Hershey's Peanut Caramel Bar	Snickers
Hershey's Special Dark	Stouffer's
Hershey's Symphony	Sugus
Hershey's Syrup	Taster's Choice
Ice Breakers	3 Musketeers
Jindi	TicTac
Jinsha	Twix
Jolly Rancher	Uncle Ben's
Kentucky Fried Chicken	Whac-a-Mole
KitKat	White Rabbit

Foreword

Cacao began its global journey over five hundred years ago when the Spanish conquistadors brought seeds back to Spain from Mesoamerica and introduced what would become an icon of the Western world's decadence and indulgence to Europe. Only during the last quarter of a century has cacao's journey extended into China.

Today, world business leaders are captivated by the sheer size of the China market, and those in the global chocolate industry are no exception. In *Chocolate Fortunes*, Lawrence Allen, a Thunderbird alumnus, paints a compelling, comprehensive, and dynamic portrait of the global chocolate industry's quarter-of-a-century endeavor to capture the mindshare and taste buds of Chinese consumers, which proved a Sisyphean challenge for most.

It is fitting that this story be told by a Thunderbird alumnus. For the last sixty-two years, Thunderbird has been dedicated to educating global leaders who can break barriers, build bridges of cooperation and understanding, and create new ventures that bring about prosperity around the world. Thunderbird's ap-

proach is a combination of global mind-set (an appreciation of cultural and institutional differences), global entrepreneurship (turning differences into opportunities to create value), global connections (the ability to build trusting and productive relationships across boundaries), and global citizenship (a commitment to creating sustainable value for all parties involved in a global business enterprise). Allen's career is the ultimate Thunderbird story. And he uses it to thoughtfully extract lessons that can be of great value to many other leaders involved in the fascinating world of global business.

Allen skillfully weaves the story of the evolution of the Chinese economy from austerity to increasing affluence since it opened to the West just over thirty years ago. While he does this through the lens of the chocolate industry in China, the tapestry of *Chocolate Fortunes* is a rich story of evolving social, cultural, and economic Chinese dynamics and how these interact with the business drama that focuses on one industry's major global competitors. Allen's ability to shift back and forth between the specific practices and mind-sets of competitors in the chocolate industry and the Chinese context in which they compete is engaging, entertaining, and informative.

Chocolate Fortunes is a complex story representative of almost all industries that have entered this market, considered one of the most challenging in the world. Allen's firsthand account of the five global chocolate titans—Ferrero, Cadbury, Hershey, Nestlé, and Mars—documents five market entry approaches and the impact of each competitor's administrative heritage that led each to take the path it chose. As important, Allen documents the impact that leaders' decisions have on a company's success. His in-depth description of common China challenges such as local copycats, logistics nightmares, culturally based challenges, and

the emergence of credible local competitors provides generalizable lessons for any company considering entry into the increasingly sophisticated China market.

China and the China market provided a perfect laboratory in which different market entry “experiments” could play out. The evolution of the Chinese economy has been spectacular and much faster than anticipated. Most early China scholars and business investors cannot believe the pace and scope of change in thirty years. The chocolate industry is an understandable one—and one that generates considerable passion and strong preferences among consumers. The chocolate industry competitors encountered a clean slate in China, and this gave each a perfect opportunity to shape the consumer’s reality in its favor. Allen’s combination of this location in this time frame for this industry provides a remarkable panoramic comparison for marketers, strategists, and leaders alike. It is rare that such a comprehensive story can be documented and presented in such a compelling fashion. This story could only have been told by a perceptive person with a front-row seat and hands-on experience with the steps and missteps of the chocolate industry in this most recent leg of its journey and the fits and starts of China’s recent economic and social evolution.

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Introduction

One Country, Three Centuries

China's breathtaking transformation from a command to a market-socialist economy over the past twenty-five years has turned some 300 million of its 1.3 billion people into ravenous consumers of everything from candy to cars. And until twenty-five years ago, almost none of them had ever eaten a piece of chocolate. They were, to coin a phrase, "chocolate virgins," their taste for chocolate ready to be shaped by whichever chocolate company came roaring into the country with a winning combination of quality, marketing savvy, and manufacturing and distribution acumen. In short, China was the next great frontier, a market of almost limitless potential to be conquered in a war between the world's leading chocolate companies for the hearts, minds, and taste buds—and ultimately the wallets—of China's consumers. To the victor of the chocolate wars would go the spoils of over a billion potential customers for generations to come.

Despite China's radical transformation over the past quarter century, from economic basket case to economic powerhouse, it is still a work in progress. Figuratively speaking, in China today there are fewer than 50 million people living in the twenty-first century, about 300 million living in various stages of the twentieth century, and nearly a billion people living in the latter part of the nineteenth century. Nevertheless, China's economic renaissance over the past two and a half decades has been nothing short of astonishing, especially considering the havoc wreaked by the failed economic, social, and cultural experiments of the 1950s, 1960s, and 1970s—and the brutality with which they were carried out. This period would, however, prove to be the dark hour before the dawn of China's emergence, under Deng Xiaoping,¹ into the global economy, a process begun in the late 1970s.

And while China's transformation is unprecedented, so too was the establishment of foreign businesses within a major country undergoing a complete economic and social transformation from a centrally planned economy to a market-socialist economy.

* * * * *

For seven years, between 1998 and 2006, I was a foot soldier in the “chocolate war,” first as an executive with Hershey, and later Nestlé, two of the world's largest manufacturers of chocolate; as such, I was on the front lines of a battle for the hearts, minds, and taste buds of more than a quarter billion people constituting China's new consumer class.

This book is the story of the five global titans of chocolate—Ferrero, Cadbury, Hershey, Nestlé, and Mars—that bat-

tled to capture a once-in-a-lifetime opportunity to establish their brands with one-fifth of the world's population. It is also the inside story of East meeting West through the introduction into China, a xenophobic land of austerity and deprivation, of an icon of the Western world's decadence and self-indulgence: chocolate.

When I first arrived in China in the 1980s, I was a newly minted MBA; a twenty-something, "me-generation" American looking for adventure and riches in this vast economic frontier. The country was then in the early, experimental phase of its social and economic transformation, and trying to do business there meant wading endlessly through the detritus of vestigial government organs and policies while attempting to find purchase on its ever-changing economic and regulatory landscape. A high tolerance for ambiguity was essential.

Two early experiences exemplify the Alice in Wonderland nature of doing business there at the time, and it is a tale of two cities: Beijing, the belly of China's centrally planned communist beast; and Shenzhen, the tip of the spear of China's economic reforms.

During my final semester of graduate school at the Thunderbird School of Global Management, I co-founded Transnational Trade Services, a general trading company with glamorous headquarters in my Arizona dorm room. My most promising client was an American antiques buyer, and shortly after graduation I traveled to China together with my classmate and Chinese business partner, Li Jianmin, to find a source for Chinese antiques.

Upon arriving in Beijing we went to meet a former associate of Li's, a branch manager of a state-owned trading company, to see whether he could help us locate and export

antiques. His office was located in an unimpressive, soot-covered one-story government building; it was not exactly an auspicious beginning, and our fortunes didn't improve from there. Though we were greeted politely, through Li's trustworthy translation and my basic Mandarin Chinese, it quickly became clear that this gentleman was a midlevel, lifelong bureaucrat comfortably ensconced in a large bureaucracy. As we talked, I became increasingly mindful of the portrait of Chairman Mao,² literally and figuratively looking over his shoulder. Throughout our discussion he was consistently oblique and noncommittal.

The business we were proposing would be new to him and his department, he said, and would require approvals from many different people in many different agencies. This would be difficult and would take time. Finding the antiques we were looking for would also be a time-consuming process, and even with the approvals and the goods in hand, export procedures would be cumbersome. Where we saw opportunity he saw barriers. Perhaps, we thought, we would make more progress over a meal, and we invited our host to lunch. By the time we left the building for a nearby restaurant, we had nearly a dozen of his colleagues in tow. It seemed he'd invited nearly everyone in his office. Far too much food and too many bottles of wine were ordered, and when we parted my lunch guests were loaded down with doggie bags full of food and wine, a bounty they would share with grateful families that evening.

As I reflected on what had gone wrong, I realized that, for many in China, it must be difficult and risky to break with old habits. This gentleman had nothing to gain from meeting with us—other than a free lunch with enough left over for his family. If something went wrong, he would have a problem on his

hands. If he did nothing, he would still get his government pay, housing, and benefits. Why take a chance? I clearly had a lot to learn about doing business in China.

Shortly after this encounter, as a tourist accompanying a Taiwan tour group, I took a trip to Hong Kong, then a British colony. After several days of shopping and sightseeing, we boarded a bus for a day trip across the border to Shenzhen, one of the special economic development zones created by China in the 1980s as an early experiment in capitalism. As we approached the border, the travel agent running the tour handed each passenger a stack of documents and five hundred Hong Kong dollars (about US\$65)—everyone except me, that is. When I asked why I'd been overlooked, one of my fellow passengers explained that the government was trying to encourage ethnic Chinese from Taiwan, Hong Kong, and Macau to come to mainland China to aid in the development of their ancestral homeland. As an incentive, first-time arrivals, even if just visitors, were allowed to bring motorcycles, refrigerators, and a host of other high-value consumer goods into the country duty-free. These goods would be ready and waiting on the Hong Kong side of the border and the stack of papers being distributed on the bus were for customs. The travel agent offered qualified passengers that money to carry the documents through Chinese customs, where they would then receive the necessary "chop" (application of an official government seal). The goods listed on the forms didn't belong to the passengers; the passengers were simply being "encouraged" to act as document mules for the travel agent, who would collect the chopped documents on the Chinese side of the border and send them to business associates in Hong Kong. Those documents would then be used to bring mer-

chandise into China duty-free. In essence, it was a scheme that parlayed the duty-exempt status of Taiwan, Hong Kong, and Macau Chinese visiting the country into a lucrative, multimillion-dollar, duty-free import business.

This experience couldn't have been more different from the one I had recently had in Beijing. Shenzhen was a whirlwind of frenzied and unbridled Wild West-style capitalism. Beijing, on the other hand, appeared stuck in a time warp of monolithic central planning and ossified bureaucracy. This perplexing dichotomy raised the question: What is the right way to do business in China? It is a question I have been trying to answer ever since, for China today remains both of these places. There are no simple answers in China—just endless questions, as the Big Five chocolate companies that battled for dominance in China would find out.

* * * * *

Perhaps the best known, but most misunderstood expression to come out of China's transformational era is a simple but powerful statement made by China's Paramount Leader, Deng Xiaoping: "It doesn't matter if a cat is black or white, so long as it catches mice." In its most elementary form, this was a straightforward philosophical statement in support of economic pragmatism. Some Western pundits mistook the statement as a swipe at communism and China's one-party system, suggesting that democracy and full-scale capitalism were just around the corner. They were not. Deng Xiaoping was an ardent communist to the end of his life. Though he made the statement in 1961, from 1978 onward the black cat/white cat metaphor would have great symbolic meaning among the

Chinese as a challenge to decades of a self-destructive, obsessive fascination with the concept of class struggle as a means to building an egalitarian society. In retrospect, it also signaled the turn from a ruinous era of economic and social chaos driven by rigid ideological orthodoxy to a transformational era of unprecedented economic growth and prosperity—one that continues to this day.

In 1978, of course, the path to this growth and prosperity was unclear and the challenge staggering. But what was clear to Deng and his fellow reformists was that the time for endless debates about economic theory had come to an end, and the time to unlock the energy, strength, ingenuity, creativity, and adaptability of the Chinese people had arrived. As Deng said of the transformation that lay ahead: “We must cross the river by feeling the stones with our feet.”

China’s transition to world economic powerhouse would take thirty years, and the development of its chocolate market was inexorably tied to the various stages of this remarkable social and economic transformation. For the world’s leading chocolate companies, China was a new frontier with boundless possibility, and indeed, even today the potential for growth is breathtaking. But the chocolate war wasn’t simply a fight for the hearts, minds, and taste buds of Chinese consumers, nor was it simply a battle among the chocolate companies involved. It was also a struggle for global chocolate companies to discern a route to commercial success in China.

Each player came to the battlefield equipped with its own arsenal of strengths. Italian chocolate maker Ferrero, the Ferrari of chocolate, had Ferrero Rocher, a unique product—a delicate chocolate and hazelnut confection encased in an elegant gold foil wrapper—and an upscale cachet that had a

proven appeal to chocolate consumers worldwide. Cadbury was the chocolate of the British Empire and had a presence in Britain's Chinese enclaves during the colonial era. Hershey, the purveyor of the great American chocolate bar, had a less-than-stellar track record in the international arena but brought a much-needed will to find a way in China. Nestlé, the Swiss-based global food titan, and by some reckoning the world's largest seller of chocolate, brought enormous resources and extensive experience to global markets. Mars, an American family-owned chocolate giant, had a reputation as a tough street fighter and a determination to succeed in the China market.

The battle for China's chocolate market holds lessons for anyone doing, or about to do, business in this most dynamic of markets. There is no single path to business success there, however; the country is too big, too complex, and evolving too quickly for simple, "one size fits all" business formulas. Nevertheless, the story of the chocolate war is highly instructional.

But the story of the opening of China's chocolate market isn't simply a business story; it's a window into the world's most populous country—one that is, almost by the day, acquiring greater and greater economic and political clout and positioning itself for a powerful, if not preeminent role, in shaping world events and the global future. Never before has China's destiny been so closely intertwined with our own, or with the rest of the world's. And for years, never had the future of chocolate been so intertwined with one nation's perilous transformation from rags to riches.

China and Chocolate

East Meets West

A famous colonial-era saying from the mid-1800s held that if Chinese men added just an inch to the length of their shirttails, fortunes would flow to English textile mills. Such overreaching ambitions have been typical of foreign companies that have eyed the China market for centuries.

The reality for British colonial-era merchants was that their wares rarely reached beyond the small foreign enclaves scattered along China's coast. Most Chinese, however, were physically, and culturally, beyond the coast. They had their

own clothing fashions and styles, for example, and except perhaps for the few who regularly mixed with foreigners, they weren't much interested in English textiles, which were far too expensive for nearly all Chinese anyway. In short, the vast majority of the population was inaccessible: physically, culturally, and financially.

More than a century later, the same is true about the nearly 1 billion Chinese (of a total population of 1.3 billion) who still live, figuratively speaking, in the nineteenth century; they are simply out of reach for most foreign companies. Even if the Big Five chocolate companies were able to get their products in front of these consumers, chocolate is so foreign that it would have limited appeal to their untrained palates. And who would spend almost a day's wages on a chocolate bar? Thus, the battle for China's chocolate affections has been limited to its emerging consumer class in the major cities.

China is one of humankind's oldest civilizations, perhaps the oldest civilization in continuous existence, ruled by a virtually unbroken series of successive imperial dynasties that stretches back thousands of years. Its break with its imperial lineage occurred so recently that even as late as the 1990s it wasn't uncommon to see little old ladies shuffling along Chinese streets on bound feet, a practice that faded only with the end of the Qing Dynasty, China's last imperial dynasty, in 1911.¹ One could even read an interview with a Qing Dynasty-era eunuch in a Chinese newspaper just a decade ago.

China has its own complex and illustrious history, with a cultural DNA that evolved from Confucian² philosophy and that developed independently from Judeo-Christian societies in the West. The cultural crevasse between China and the West reaches down to the most fundamental cultural values,

and one of those cultural values is food itself. Judeo-Christian cultures have evolved on the principle that “man does not live by bread alone,” meaning that physical nourishment is only a part of life and implying that satisfying spiritual needs is also essential. Chinese, on the other hand, have viewed food as *min yi shi wei tian*, “for people, food is heaven,”³ meaning that the essence of what is most important in life is a full belly. Though this view has become somewhat of a quaint cultural vestige among the most prosperous and worldly of China’s modern-day big-city dwellers, for the vast majority of people, the country’s rural poor in particular, it is a belief that is still very much alive and all too relevant to their daily lives. A good example of this can be found in the way many people still greet each other in China: “*chi fan le mei you*,” (“Have you eaten?”). Big Five chocolate company executives needed to grasp the significance of these kinds of fundamental cultural differences to formulate successful plans for introducing their products to Chinese consumers in a way that was meaningful to them. And some of the more influential differences between China and the outside world resulted more from its recent history than from its ancient cultural characteristics.

China’s recent isolation from the outside world and economic debacles that occurred during the 1950s, 1960s, and 1970s ensured that all of the Big Five chocolate companies shared the same anonymity with China’s consumers. Furthermore, since chocolate had no history or tradition in China, to speak of, it was a completely foreign product to virtually all Chinese when it arrived in the 1980s. Each of the Big Five chocolate companies—Ferrero, Cadbury, Hershey, Nestlé, and Mars—would make a contribution to the development of China’s chocolate market, simply by establishing a presence

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