

P R O G R A M



International Food and Agribusiness  
Management Association

A collage of various images related to food and agriculture, including a globe, hands holding a seedling, a person eating, a container ship, and a person in a lab coat. The collage is composed of several rectangular panels of different colors and images.

# 15th Annual World Forum, Symposium and Case Conference

June 25–28, 2005

Fairmont Hotel • Chicago, Illinois, U.S.A.

*“Re-inventing the Food Chain:  
New Products, Consumers, and Markets”*





## Welcome

It is my pleasure to welcome you to Chicago for IAMA's 15th Annual Conference. As a world-wide leadership forum, IAMA brings together top food and agribusiness industry leaders, academics, policy makers and representatives of consumers and other stakeholders in the food system to stimulate strategic thinking across the food chain. This year's theme "Re-Inventing the Food Chain: New Products, Consumers and Markets" highlights the challenges faced by the agrifood system.

Numerous influences impact and drive consumer trends and preferences. The challenge is to determine what the food consumer of the future may want and how to position your organization or research to help satisfy consumer demands.

Industry and government leaders can help shape the research and education agendas by interacting with researchers and educators who are analyzing

significant trends and evolving industry structures relative to emerging consumer demands. Together, management strategies and future options can be explored, ultimately enhancing the food chain's ability to deliver new products to new markets and consumers.

The knowledge shared and the relationships we build during these few days will be invaluable to each of us in the future. Enjoy the conference, contribute your ideas, make new friends, and strengthen your professional expertise.

I hope that you will enjoy the Chicago environs and hospitality.

Walter J. Armbruster  
IAMA President  
President Farm Foundation

## Conference At-A-Glance

### IAMA Symposium & Case Conference

*Sponsored by: Nestle, Syngenta & Unilever*

#### SATURDAY, JUNE 25, 2005

7:00AM – 8:00AM  
Student Meeting

8:00AM – 8:30AM  
Symposium Welcome

8:30AM – 10:00AM  
Session #1 – Concurrent Presentations  
Agribusiness Case Conference

10:00AM – 10:30AM  
Networking Break  
*Sponsored by: Diamond of California*

10:30AM – 12:00PM  
Session #2 – Concurrent Presentations  
Agribusiness Case Conference

12:00PM – 1:30PM  
Basket Lunch

1:30PM – 3:00PM  
Session #3 – Concurrent Presentations  
Agribusiness Case Conference

3:00PM – 4:30PM  
Session #4 – Concurrent Presentations  
Agribusiness Case Conference

6:00PM – 7:00PM  
Student/Industry Reception  
*Sponsored by: Nestle*

#### SUNDAY, JUNE 26, 2005

8:00AM – 9:00AM  
IAMA Executive Committee Meeting

10:00AM – 12:00PM  
IAMA Board of Directors Meeting

8:30AM – 10:00AM  
Session #5 – Concurrent Presentations  
Agribusiness Case Conference

10:00AM – 10:30AM  
Networking Break  
*Sponsored by: Diamond of California*

10:30AM – 12:00PM  
Session #6 – Concurrent Presentations  
Agribusiness Case Conference

12:00PM – 1:30PM  
Basket Lunch

1:30PM – 3:00PM  
Session #7 – Concurrent Presentations  
Agribusiness Case Conference

3:00PM – 4:30PM  
Session #8 – Concurrent Presentations  
Agribusiness Case Conference

4:30PM – 6:00PM  
Task Group Meetings

6:00PM – 7:30PM  
Welcome Reception  
*Sponsored by: ADM & Dow AgroSciences*

7:30PM  
Sponsors & Speakers Dinner

IAMA Forum  
*Sponsored By: Nestle & Mosaic*

#### MONDAY, JUNE 27, 2005

7:30AM – 8:45AM  
Fellows Breakfast

9:00AM – 10:00AM  
Opening Session – Change and Change Management

10:00AM – 10:45AM  
Networking Break  
*Sponsored by: SYSCO*

10:45AM – 12:15PM  
Creating Value Through Coordination

12:15PM – 2:00PM  
Basket Lunch  
*Sponsored by: John Deere*

2:00PM – 3:30PM  
The Changing Consumer: Demanding but Predictable

3:30PM – 4:15PM  
Networking Break  
*Sponsored by: SYSCO*

4:15PM – 5:45PM  
Redefining the Distribution Channel: Lean but Responsive

5:45PM – 6:30PM  
General Assembly/Business Meeting

7:30PM – 9:00PM  
Presidential Reception  
*Sponsored by: Harris Nesbitt*

#### TUESDAY, JUNE 28, 2005

7:30AM – 8:45AM  
IFAMR Editorial Board Meeting

8:45AM – 9:00AM  
Induction of IAMA Fellows

9:00AM – 10:30AM  
The Farmer of the Future: Buying Behavior and Market Potential

10:30AM – 11:15AM  
Networking Break  
*Sponsored by: SYSCO*

11:15AM – 12:45PM  
International Suppliers: Challenges and Potential

12:45PM – 2:15PM  
Lunch Session: Doing Business in China - Balancing Risks and Rewards:  
*Sponsored by: Syngenta*

2:30PM – 4:00PM  
Financing the New Food Industry

4:00PM – 4:45PM  
Positioning to Compete in the New Food Industry

4:45PM – 5:00PM  
Closing and Adjournment

5:30PM – 7:00PM  
2006 Program Planning Committee Meeting



## IAMA Forum Schedule

### IAMA Forum Schedule

#### Forum Program

*Sponsored by: Nestle & Mosaic*

#### MONDAY, JUNE 27, 2005

7:30AM – 8:45AM

**Fellows Breakfast:** *Primavera Room*  
*IAMA Fellows & Spouses Only*

9:00AM – 10:00AM

**Opening Session – Change and Change Management:** *Imperial Ballroom*

**Welcome:** Dr. Walt Armbruster – IAMA President  
President, Farm Foundation, USA

**Keynote:** Mr. Jack Ablin – Chief Investment Officer,  
Harris Bank, USA

The food production and distribution industry is changing profoundly, and the changes appear to be accelerating. This opening session will describe the dramatic changes in the food industry and how the capital markets and financial analysts are assessing the challenges and opportunities in that industry.

10:00AM – 10:45AM

**Networking Break:** *Imperial Foyer*  
*Sponsored by: SYSCO*

10:45AM – 12:15PM

**Creating Value Through Coordination:**  
*Imperial Ballroom*

**Moderator:** Mr. Lynn White – Vice President, Global  
Ag. Services, John Deere, USA

Mr. Jeff Gargiulo – President and CEO, Sunkist  
Growers, USA

Mr. John Johnson – President and CEO, CHS  
Cooperatives, USA

Ms. Annalisa King – Sr. Vice President, Vertical  
Coordination, Maple Leaf Foods, Canada

The food industry is being rapidly transformed from a transactional market with limited loyalty and repeat business to a relationship market with tighter linkages and alliances across the food chain from production to consumption. The challenges and opportunities of successful coordination of value chains in the animal protein and fruit and vegetable industries will be the focus of this session.

12:15PM – 2:00PM

**Basket Lunch:** *Imperial Ballroom*  
*Sponsored by: John Deere*

2:00PM – 3:30PM

**The Changing Consumer: Demanding but Predictable:** *Imperial Ballroom*

**Moderator:** Mr. Gianluigi Zenti – Executive  
Director, Academia Barilla, Italy  
Mr. Bill Bishop – President, Willard Bishop  
Consulting, USA  
Mr. Hans Jöhr – Corporate Head of Agriculture,  
Nestec, Switzerland  
Mr. George Hoffman, President & CEO, Restaurant  
Services Inc., USA

No one doubts that the food consumer is more demanding in terms of attributes of their food products (quality, safety, nutrition) and services surrounding their eating experience. The major question to be addressed is what specifically will the food consumer of the future want, is it predictable, and how are food companies positioned to serve them.

3:30PM – 4:15PM

**Networking Break:** *Imperial Foyer*  
*Sponsored by: SYSCO*

4:15PM – 5:45PM

**Redefining the Distribution Channel: Lean but Responsive:** *Imperial Ballroom*

**Moderator:** Dr. Mike Boehlje – Professor,  
Agricultural Economics, Purdue Univ., USA  
Dr. Don Bowersox – Professor, Eli Broad Graduate  
School of Mgt., Michigan State Univ., USA  
Mr. Craig Watson – Vice President, Quality  
Assurance, SYSCO Corporation, USA  
Mark Foster – Vice President, Supply Chain,  
SUPERVALU, Inc., USA

The distribution channel from input manufacturing to producer and food processor to retailer is being consolidated to reduce costs, streamline logistics, accelerate product flow, maintain and enhance quality and respond more quickly to customer demands. This session will discuss the changes in the distribution channels in other industries, the drivers of change in the food sector and how specific agricultural input retailers and food distributors are responding.

5:45PM – 6:30PM

**General Assembly/Business Meeting:**  
*Imperial Ballroom*

7:30PM – 9:00PM

**Presidential Reception:** *Moulin Rouge Room*  
*Sponsored by: Harris Nesbitt*  
15th Anniversary Ceremony  
Sponsor Awards

#### TUESDAY, JUNE 28, 2005

7:30AM – 8:45AM

**IFAMR Editorial Board Meeting:** *State Room*

8:45AM – 9:00AM

**Induction of IAMA Fellows:** *Imperial Ballroom*

9:00AM – 10:30AM

**The Farmer of the Future: Buying Behavior and Market Potential:** *Imperial Ballroom*

**Moderator:** Mr. Hector Laurence – President and  
CEO, McLaren Holdings, Argentina  
Dr. Steve Sonka – Partner, Centrec Consulting &  
Director, Technology Research Initiative, Univ. of  
Illinois, USA  
Dr. Allan Gray – Associate Professor, Dept. of  
Agricultural Economics, Purdue Univ., USA  
Mr. Terry Mosier – Director of Strategic Marketing,  
John Deere, USA

Farming is in the midst of a major transformation – not only in technology and production practices, but also in size of business, resource (land) control and operation, business model and linkages with buyers and suppliers. This session will tackle the following questions. How will your farmer customer base change in the future in terms of size, resource control and buying/selling behavior? How might attributes (i.e. price, service, convenience, product performance, etc.) be considered and valued in the producer's purchasing and selling behavior?

10:30AM – 11:15AM

**Networking Break:** *Imperial Foyer*  
*Sponsored by: SYSCO*

11:15AM – 12:45PM

**International Suppliers: Challenges and Potential:** *Imperial Ballroom*

**Moderator:** Mr. Steven Jaffee – Senior Economist,  
International Trade Dept., World Bank, USA  
Ms. Archana Agrawal - Project Coordinator,  
Diversified Agricultural Services Project, World  
Bank, India  
Dr. Thomas J. Herlehy - Chief of Party, EL SHAMS  
Project, CARE-Egypt  
Mr. Daniel Miller - Agriculture Development  
Officer, Agriculture & Rural Development,  
USAID-Afghanistan

More and more food companies are sourcing their raw materials and products globally. A fundamental challenge for domestic producers and suppliers throughout the world is seeking out these business opportunities and developing sustainable win-win relationships in a business climate where transportation, logistics and information technology enables product movement and competition to be increasingly global.



12:45PM – 2:15PM

**Lunch Session: Doing Business in China – Balancing Risks and Rewards:**

*Imperial Ballroom*  
*Sponsored by: Syngenta*

**Introduction:** Mr. Bill Whipple – Executive Vice President, Food Group, Harris Nesbitt, USA  
Mr. Robert Martin – Managing Director & Regional Executive, BMO Financial Group, Hong Kong, China

What risks do foreign companies face when they target the Chinese market, and how can they position themselves for success? As personal incomes rise, Chinese food consumption is growing and food preferences are changing. How is China's food industry adapting to these changes? What are the best export and sourcing opportunities?

2:30PM – 4:00PM

**Financing the New Food Industry:**

*Imperial Ballroom*

**Moderator:** Ms. Erica Kuhlmann – Managing Director, Food Group, Harris Nesbitt, USA  
Ms. Mary Burke – Principal, The Food Partners, USA  
Mr. Bing Graffunder, CEO, Fairmount Food Group, USA  
Mr. Pieter Kodde, Managing Director, Financial Sponsors Group, Rabobank, USA

The capital markets allocate funds to those ventures that have the most profit potential, and agriculture has to compete with other industries for financing. And within the industry the debt and equity markets are increasingly separating the "winners" from the rest and funding their growth plans. The perspective of investment analysts concerning the

food industry, and the restructuring of the industry through mergers and acquisitions and other forms of consolidation will be the focus of this session.

4:00PM – 4:45PM

**Positioning to Compete in the New Food Industry:** *Imperial Ballroom*

**Moderator:** Dr. Walt Armbruster – President, Farm Foundation, USA  
Mr. Hans Jöhr – Corporate Head of Agriculture, Nestec, Switzerland  
Mr. Hector Laurence – President and CEO, McLaren Holdings, Argentina  
Mr. Bill Whipple – Executive Vice President, Food Group, Harris Nesbitt, USA  
Mr. Gianluigi Zenti – Executive Director, Academia Barilla, Italy  
Mr. Lynn White – Vice President, Global Ag Services, John Deere, USA

The forum will be closed by a panel of agribusiness leaders who will provide examples of how global agribusinesses with long traditions are reinventing themselves to continue being critical players in the changing food industry.

4:45PM – 5:00PM

**Closing and Adjournment:** *Imperial Ballroom*

Dr. Walt Armbruster – IAMA President (2004–05)  
Mr. Hector Laurence – IAMA President (2005–06)  
Mr. Gianluigi Zenti – IAMA President–Elect

5:30PM – 7:00PM

**2006 Program Planning Committee Meeting:** *State Room*

**IAMA Symposium & Case Conference Schedule**

**Symposium & Case Conference**

*Sponsored by: Nestle, Syngenta & Unilever*

**SATURDAY, JUNE 25, 2005**

7:00AM – 8:00AM

**Student Meeting:** *Chancellor Room*

*Attendance required for travel grant recipients.*

8:00AM – 8:30AM

**Symposium Welcome:** *Imperial Ballroom*

8:30AM – 10:00AM

**Session #1 – Concurrent Presentations:**

*Breakout Rooms (Ambassador, Embassy, State, Chancellor, Moulin Rouge)*

**Agribusiness Case Conference:** *Imperial Ballroom*

10:00AM – 10:30AM

**Networking Break:** *2nd Floor Foyer*

*Sponsored by: Diamond of California*

10:30AM – 12:00PM

**Session #2 – Concurrent Presentations:**

*Breakout Rooms (Ambassador, Embassy, State, Chancellor, Moulin Rouge)*

**Agribusiness Case Conference:** *Imperial Ballroom*

12:00PM – 1:30PM

**Basket Lunch:** *Imperial Ballroom*

1:30PM – 3:00PM

**Session #3 – Concurrent Presentations:**

*Breakout Rooms (Ambassador, Embassy, State, Chancellor, Moulin Rouge)*

**Agribusiness Case Conference:** *Imperial Ballroom*

3:00PM – 4:30PM

**Session #4 – Concurrent Presentations:**

*Breakout Rooms (Ambassador, Embassy, State, Chancellor, Moulin Rouge)*

**Agribusiness Case Conference:** *Imperial Ballroom*

6:00PM – 7:00PM

**Student/Industry Reception:** *Primavera Bar*

**SUNDAY, JUNE 26, 2005**

8:00AM – 9:00AM

**IAMA Executive Committee Meeting:**

*Moulin Rouge Room*

10:00AM – 12:00PM

**IAMA Board of Directors Meeting:**

*Moulin Rouge Room*

8:30AM – 10:00AM

**Session #5 – Concurrent Presentations:**

*Breakout Rooms (Ambassador, Embassy, State, Chancellor)*

**Agribusiness Case Conference:** *Imperial Ballroom*

10:00AM – 10:30AM

**Networking Break:** *2nd Floor Foyer*

*Sponsored by: Diamond of California*

10:30AM – 12:00PM

**Session #6 – Concurrent Presentations:**

*Breakout Rooms (Ambassador, Embassy, State, Chancellor)*

**Agribusiness Case Conference:** *Imperial Ballroom*

12:00PM – 1:30PM

**Basket Lunch:** *Imperial Ballroom*

1:30PM – 3:00PM

**Session #7 – Concurrent Presentations:**

*Breakout Rooms (Ambassador, Embassy, State, Chancellor, Moulin Rouge)*





## IAMA Fellows Award Recipients

## Cultural Tours

### **Agribusiness Case Conference: Imperial Ballroom**

3:00PM – 4:30PM

#### **Session #8 – Concurrent Presentations:**

*Breakout Rooms (Ambassador, Embassy, State, Chancellor, Moulin Rouge)*

### **Agribusiness Case Conference: Imperial Ballroom**

4:30PM – 6:00PM

#### **Task Group Meetings:**

Food Safety and Quality Task Group: *State Room*

Role of the Private Sector in Economic & Social

Development Task Group: *Chancellor Room*

Contribution of Technology to Supply Chains Task

Group: *Crystal Room*

Effective Food Chain Management Task Group:

*Regent Room*

Education and Knowledge Transfer Task Group:

*Imperial Ballroom*

6:00PM – 7:30PM

#### **Welcome Reception: Moulin Rouge Room**

*Sponsored by: ADM & Dow AgroSciences*

7:30PM

#### **Sponsors & Speakers Dinner: Crystal Room**

*By Invitation Only*

Since its founding, IAMA has been successful due to the vision, hard work and creative efforts of a few key individuals. These individuals have distinguished themselves as leaders in the food and agribusiness industry as well as in service to IAMA. This is the highest award given by IAMA and is awarded only to members who have made outstanding and sustained contributions to the success of the organization, and are demonstrated leaders in the food and agribusiness industry.

**Mr. Hans Jöhr, Past-President**

**Ms. Manuela Gut-Rella, Board Member**

### Conference Attire

- IAMA Forum & Symposium: Business Casual Attire
- Welcome Reception & Presidential Banquet: Business Attire
- Tours: Casual/Seasonal

### **Architectural River Cruise – Sunday, June 26**

The Architectural River Cruise provides an unobstructed view of Chicago's skyline. This 90-minute river cruise places you at the feet of over one hundred skyscrapers, each designed or inspired by the modernists of nearly a century ago. As you travel through the birthplace of modern architecture, a guide will describe the work of those who revolutionized the building arts, and how they are linked structurally and architecturally. The tour will depart from the IAMA Registration desk at 8:15AM on Sunday, June 26 and return at 11:00AM.

### **The Magnificent Mile – Monday, June 27**

Enjoy a walking tour of the "Magnificent Mile" led by Jan Siebert and Ann Whipple. There are scores of department stores, specialty shops, fine restaurants, and luxury hotels that stretch almost a mile down Michigan Avenue. This tour will depart from the IAMA Registration Desk at 1:00PM on Monday, June 27 and return at approximately 5:00 PM.

### **Chicago's Museum Campus – Tuesday, June 28**

The Chicago Museum Campus is comprised of The Field Museum of Natural History, The John G. Shedd Aquarium, and The Max Adler Planetarium and Astronomy Museum. Transportation will be provided from the Fairmont Hotel to the Museum Campus, where you will have the opportunity to purchase a pass for the museum(s) of your choice. **Museum passes are not included in the tour price.** This tour will depart the IAMA registration desk at 9:00AM. Return times will be at the discretion of tour participants.

## Post Conference Event

### **USAID/World Bank Post-Conference Workshop – June 29–30, 2005**

The workshop "Inaugurating New Partnerships in the Global Food Chain: Experiences from North Africa, the Near East and Asia" will provide a forum for open discussions and debate between the relevant parties on possible solutions to the current constraints confronting the international development community in the design, establishment and delivery of economically viable and sustainable market-driven agribusiness development initiatives. Drawing upon a unique set of innovative USAID and World Bank agribusiness projects, this workshop will allow USAID and World Bank Mission personnel, public and private industry leaders and academics to interact and exchange ideas, lessons learned, and best practices. In addition to discussing successes and failures from projects present and past, the meeting will also attempt to actually launch new pilots.





International Food and Agribusiness  
Management Association

IAMA Business Office Contact Information:

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Program Planning Committee

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Walt Armbruster – *IAMA President*  
Hector Laurence – *IAMA President-Elect*  
Jerome Siebert – *Executive Vice-President*  
Mike Boehlje – *Forum Co-Chair*  
Lynn White – *Forum Co-Chair*  
Dennis Conley – *Symposium Chair*  
Hector Ordonez – *Symposium Vice-Chair*  
Francesco Braga – *Case Conference Co-Chair*  
Greg Baker – *Case Conference Co-Chair*  
Bill Gorman  
Ulrich Kihm  
Erica Kuhlmann  
Marcos Neves  
John Nichols

Sponsored by:

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