

BUSINESS & FINANCE

Shares

Of Robot

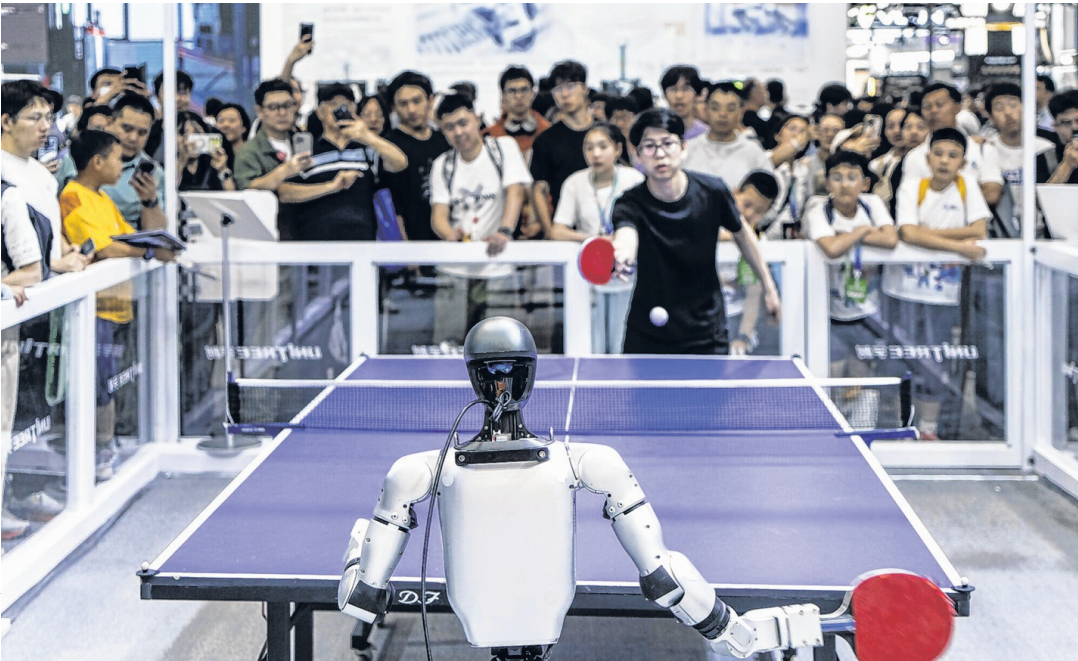
Maker Soar

Continued from page B1

such as sorting warehouse merchandise and folding laundry.

Chinese humanoid robots have made significant progress including beating humans' record time in a half-marathon. Yet, the technology is still a long way from replacing what a skilled factory worker or hotel housekeeper can do, in the view of many specialists.

For now, Unitree's humanoid robots find their main uses in education and entertainment, or they serve as guinea pigs in the labs of robotics researchers. The most popular model sells for the equivalent of \$12,600 or more



A Unitree humanoid robot played ping pong against a human at the conference in Beijing on Wednesday.

and is readily available in China for purchase online. Wang, the company founder, told investors this month that

he wanted eventually to bring his humanoids into factories and homes.

Chinese developers still

trail their U.S. rivals in developing robotic AI models, people in the industry say. Just as language models are built on

countless texts drawn from the internet and elsewhere, humanoid robots often learn best from real-world physical data, which remains scarce. Chinese companies hope to tap their vast home market to gather data faster.

"China's approach is to drive technological innovation through rapid iteration and massive production. The immediate challenge is how the economy absorbs all that output," said Lian Jye Su, analyst at research firm Omdia.

Last year, Unitree shipped more than 5,500 humanoid robots, a scale well beyond what U.S. robot startups have

achieved so far. Morgan Stanley predicts overall humanoid-robot shipments in China will reach 50,000 units this year and more than 440,000 by 2030.

Competition is heating up in both the U.S. and China.

Tesla is preparing for mass production of its Optimus Gen 3 humanoid robots. Chinese component suppliers for Optimus said Tesla recently told them to increase supplies to support a monthly output of 8,000 robots by December.

Elsewhere in the U.S., Agility Robotics, which is preparing to go public soon, has teamed up with Amazon to test robots in the e-commerce giant's warehouses.

In China, Unitree competes with a host of robot makers including Shenzhen-based **UBTech Robotics**, which listed its shares in Hong Kong in 2023, as well as carmakers **BYD** and **XPeng**, both of which are leveraging their expertise in manufacturing and autonomous driving.



A damaged Blue Apron box. Recipe cards for meals show the ingredients that were missing from the box, circled in black.

Supply

Issues Dog

Meal Kits

Continued from page B1

Instagram Monday. "We're in the middle of an operational transition, and it hasn't gone as smoothly as planned."

Blue Apron offered a similar message: "Over the past several weeks, we've been transitioning to a new fulfillment partner, and to say that it has not gone smoothly would be an understatement," Blue Apron posted on one of its social-media accounts.

Kim Condas, a retired librarian for the Central Intelligence Agency, said her recent Blue Apron shipment box arrived damaged and missing key ingredients like the tomatoes for the "baked garlic shrimp and tomatoes" recipe.

She didn't get the noodles, scallions or soy sauce for "cold sesame noodles."

"I've skipped the next four deliveries," said the 65-year-old, who lives in Herndon, Va., and has ordered from Blue Apron for a decade.

The stumbles add to a string of struggles in the meal-kit industry since the boom times of the pandemic receded. Meal-kit companies typically sell recipes and ready-to-cook portioned ingredients that are sent to customers' residences, pitching easy, healthy, home-cooked meals. Some have expanded into ready-to-heat meals and groceries. Many of the companies have struggled to find a financial model that works long term and have cycled through different ownership and fulfillment models.

After struggling as a public company, Blue Apron was purchased by food-delivery startup Wonder in 2023 for around \$103 million, below its IPO value of \$1.9 billion in 2017. In fiscal 2022, Blue Apron reported

revenue of \$458.5 million, down from its pre-IPO revenue of more than \$790 million.

The company is "focusing our menu on what we're confident we can deliver, adding quality checks before boxes ship, and making progress with our partners to fix what's broken," a Wonder official said.

FreshRealm had been the main supplier for Blue Apron and Marley Spoon. It filed for bankruptcy-court protection earlier this year after a series of listeria outbreaks in its factories last year led **Walmart**—a major customer—to end the relationship. Walmart stopped buying its food, such as some store-brand prepared meals, in January, according to court documents related to the bankruptcy filing. Walmart accounted for over 20% of the company's revenue at the time, said the filing. Blue Apron, FreshRealm's largest customer, also filed a lawsuit to attempt to get out of its contract with FreshRealm.

HelloFresh—the largest meal kit company globally—has escaped unscathed as it does all of its meal-kit manufacturing in-house. HelloFresh used to get some ready-to-heat meals from FreshRealm but ended that relationship in the wake of the listeria problems, said a HelloFresh spokeswoman. Bankruptcy lawyers and executives for FreshRealm didn't respond to requests for comment.

As part of its bankruptcy agreement, FreshRealm sold some of its business, including parts of its Blue Apron and Marley Spoon contracts, to Misfits Markets, a Baltimore-headquartered perishable food e-commerce company that has grown its business by shipping other companies' fresh and frozen foods.

The transition process through bankruptcy has been "incredibly messy and incredibly fast," which has led to fulfillment problems, said Misfits Chief Executive Abhi Ramesh in an interview.

This year, Blue Apron-owner Wonder discussed with Misfits the idea of buying FreshRealm as bankruptcy proceeded, said Ramesh. "If the doors close for FreshRealm, as you can imagine, the doors end up closing for everyone they are doing fulfillment for," he said.

In recent weeks more meal-kit orders were transitioned from former FreshRealm locations to one of Misfits' regional warehouses, said Ramesh. Some inventory counts reported as part of the bankruptcy proceedings were incorrect, leaving the company scrambling to find enough ingredients, he said.

"I feel for the customers because it's a horrible experience," he said.

This week it pre-emptively canceled orders that won't have the required ingredients, he said. Ramesh said he hopes to be back to more normalized shipping within the next two weeks, he said.

Meanwhile, some customers have canceled orders.

For over a decade Steven McGinty of Atlanta has spent around \$70 most weeks for three Blue Apron meals to cook dinner for himself and his husband. Last week two chicken portions were missing, said the 43-year-old pricing analyst.

This week the meal box came with a container of harissa sauce splattered over its contents. McGinty has been able to get a credit, but has canceled future shipments.

"We just went to the grocery store this week like normal people."

OpenAI

Won't Keep

Client Data

Continued from page B1

vent cyberattacks or other harms caused by its models going rogue. The company recently told investors that its second-quarter revenue growth lagged behind Anthropic's, disappointing some shareholders, The Wall Street Journal reported.

OpenAI said customer data would stay on infrastructure controlled by the customer. It is also working on a system in which OpenAI could store the information with encrypted keys owned by the customer, meaning its employees wouldn't see model prompts or responses or other sensitive information.

The new system sends OpenAI a signal when it identifies risks like a cyberattack or biological weapon based on

model activity. The signal helps determine whether an action by the company is needed. Customers can appeal those decisions or share more information with OpenAI if desired. OpenAI only keeps the high-level signal detailing the severity and category of the risk.

Anthropic's popularity with businesses that pay to use its coding tools and advanced models has vaulted the company ahead in the AI race, but some of its policies have fueled a backlash in Silicon Valley and the Trump administration.

Sacks said in June that retaining customer data was "creating a new level of AI haves and have-nots," and fueling outrage among software developers using the tools.

The issue is related to a debate about open-weight models that allow users to download the numerical parameters

that determine their behavior. Many tech companies have endorsed such models, even those made in China, and asked the Trump administration not to place restrictions on them. Anthropic has warned that the tools pose safety risks because they often don't have the same safeguards as the most powerful closed models.

OpenAI recently signed an industry letter in favor of open-weight models and makes some of its own, though its most powerful tools are closed. The company has had talks with administration officials about potential restrictions on Chinese open-weight model providers that are accused of unfairly using advances made by U.S. companies in a process called distillation.

News Corp, owner of the Journal, has a content-licensing partnership with OpenAI.

The move highlights OpenAI's push to catch up to Anthropic.

INDEX TO BUSINESSES

These indexes cite notable references to most parent companies and businesspeople in today's edition. Articles on regional page inserts aren't cited in these indexes.

A	H	R
Advanced Auto Parts.....B11	Home Depot.....B3	Ross Stores.....B11
Alibaba.....B11	Hong Kong Exchanges & Clearing.....B11	S
Alphabet.....B1	L	SK Hynix.....B4
Amazon.com.....B1	Lowe's.....B3	Susquehanna International.....B1
Anthropic.....A9,B1	M	T
Apple.....B6	Merck.....A1,B12	Target.....B3
AstraZeneca.....B12	Meta Platforms.....B11	Tesla.....B2
B	Microsoft.....B1	U
Bristol-Myers Squibb.....B12	Moderna.....A1	Uber Technologies.....B4
C	N	UBTech Robotics.....B2
Cantor Fitzgerald.....B1	News Corp.....B2	Ultra Beauty.....B3
Carlsberg.....B4	Novartis.....B12	Unitree Robotics.....B1
Carlyle.....B11	Nvidia.....B4	W
D	O	Walmart.....A5,B1,B2,B11
Deere.....B11	OpenAI.....A9,B1	Williams-Sonoma.....A5
DoorDash.....B1	P	X
E	Palantir Technologies.....B1	XPeng.....B2
Eli Lilly.....B12		
Estée Lauder.....B3		

INDEX TO PEOPLE			
A			
Altman, Sam.....	A9	Martinsen, Helge André.....B11	
Ambani, Mukesh.....	B6	Meacham, Geoff.....A5	
Anjum, Haider.....	B4	Musk, Elon.....B12	
B			
Bancel, Stéphane.....	A5	N	
Bandelier, Pascal.....	B1	Nadella, Satya.....B1	
Bianco, Jim.....	A2	Narasimhan, Vas.....B12	
Briggs, John.....	A2	Nolan, Bob.....A8	
Byzika, Edison.....	A2	R	
C		Rajan, Mukund.....B6	
Carbon, David.....	B4	Ramesh, Abhi.....B2	
Chan, Bonnie Y.....	B11	S	
Chandrasekaran, Natarajan.....	B6	Sacks, David.....B1	
Crowley, Max.....	B11	Stuckey, Barb.....A8	
D		Su, Lian Jye.....B2	
Davis, Robert.....	B12	Sylvester, Cara.....B3	
de La Faverie, Stéphane.....	B3	T	
Doty, Richard.....	A8	Tata, Noel.....B6	
E		Tolle, Perth.....B12	
Ellison, Marvin.....	B3	X	
F		Xingxing, Wang.....B1	
Fielding, Natasha.....	B11		
Fiddelke, Michael.....	B3		
Fujiyama, Ian.....	B11		
Furner, John.....	A8		
G			
Gilbert, Josh.....	B4		
Grubb, Joe.....	B11		
H			
Hargis, Bryon.....	B11		
Houze, Aleah.....	B1		
K			
Karp, Alex.....	B1		
Kubasik, Chris.....	A1		
L			
Lee, John C.....	B11		
M			

Who's Who of Distinguished Leaders

DL

Distinguished Leaders

— 2026 —

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