INTERNATIONAL PROGRAM UPDATE

Hannah Lindoff | International Marketing Director | October 8, 2019
GLOBAL MARKETS OVERVIEW
CHINA TARIFFS

• May 2019 USTR released two notices that affect the import of AK seafood products from China to the US. On May 9, increased tariffs from 10% to 25%.

• On May 17, USTR published a notice of increased tariffs up to 25% on additional tariffs.

• Aug. 20, USTR published a notice announcing tariffs of 10% on approx. $300 billions good from China. List one was Sept. 1, List 2 December 15.

• Aug. 23, China announced an increase in tariff rates from 5% to 25%. AK seafood products are subject to an additional 10%, bringing the new tariff rate to 35% on top of the rates prior to the trade war.

• Aug. 30, List two from Aug. 20 went from 10 to 15%
FUNDING UPDATE

- Agricultural Trade Promotion Program
- ONE-TIME surge in funding designed to mitigate effects of trade dispute
  - $5,497,860 in ATP
  - $4,517,265 in MAP
  - ~$120,000 in Cochran missions
  - $2,000,000 in ATP
ATP STRATEGY

• Diversify markets:
  • Added SE Asia
  • Expand Brazil into S. America region

• Build Assets:
  • New suppliers directory, Seafood U, photo and video acquisition

• Spread the wealth:
  • $100 K to Technical, $20 K to Coms, etc.

• Boost traditional markets:
  • Consumer agency in Japan
  • Increased activities in all markets
PLANT INVASION!
THE AGE OF ALASKA

JAPAN GROWS OLD

Japan's percentage of population over 65 is growing faster than any other nation.

40%

30
Is the aquaculture industry ready for feces-based feed?

One new fermentation technology company has a solution, but it may not be appetizing to everyone.

The search for alternative sources of feed has led companies to creative solutions, but Norwegian fermentation technology
活動強化を目指す

「健康」「栄養」「持続性」テーマに

「日本でのアクティビティーに期待して」とリードフィクター（中央）、ハムビッグナーシングコーディネーター（左）、イスラエルのナショナルコメディティ局担当者
JAPAN

- Japan FTA….we await good news.
- The Tokyo Olympics and ASMI
JUNIOR ATHLETE MOMS

- ASMI Japan works with a culinary expert with a junior athlete child, Ms. Toshie Kikawada.
- Recipe development
- Outreach
• 1.54 million members
• Sockeye, sujiko sockeye roe, Atka mackerel, mentaiko and tarako, Alaska pollock surimi, Alaska pollock fillets
• 10 stores with sales demos, POS at 108 stores
• Free ad in magazine circulation 570,000
• $3,579,340 in sales
CHINA

China’s first pilot offshore salmon farm launched. Targeting 1,600 tons by 2020 and eventually produce up to 20,000 metric tons of Atlantic salmon.

Goal: produce smolt that can reach harvest size in 10 months. CNY 37/kg

Foreign hypermarkets making a push: Carrefour, Sam’s club, ALDI and Costco!

Value of Alaska Seafood Exports, by ASMI Region

<table>
<thead>
<tr>
<th></th>
<th>Jan-June 2017</th>
<th>Jan-June 2018</th>
<th>Jan-June 2019</th>
<th>Jan-June 2017</th>
<th>Jan-June 2018</th>
<th>Jan-June 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>$390,699,342</td>
<td>$372,533,682</td>
<td>$316,487,254</td>
<td>31%</td>
<td>28%</td>
<td>24%</td>
</tr>
</tbody>
</table>
BENLAI


• Pollock, cod, salmon and yellowfin sole and an assortment of ready items like salmon burgers.

• Benali sent 200,000 texts to loyal customers reminding them of the event, and made announcements through its WeChat and Weibo accounts.

• A collection of Alaska seafood recipes was created and published for this event.
<table>
<thead>
<tr>
<th>Name</th>
<th>Post Date</th>
<th>Platform</th>
<th>Product and Content</th>
<th>Views</th>
</tr>
</thead>
<tbody>
<tr>
<td>任芸丽（Ren Yunli）</td>
<td>2019.5.10</td>
<td>Weibo</td>
<td>Snow Crab Summer Appetizer + recipe / pictures</td>
<td>1,560,000 Views</td>
</tr>
<tr>
<td>安安的森系人间（Anan of the Forest）</td>
<td>2019.5.17</td>
<td>Yizhibo</td>
<td>Black Cod Bento Box + live stream cooking demo, pics</td>
<td>2,378,000 Views</td>
</tr>
<tr>
<td>繁星满天飞扬（Sky Full of Stars）</td>
<td>2019.5.24</td>
<td>Weibo</td>
<td>Healthy Pollock Recipe + pics</td>
<td>7,550,000 Views</td>
</tr>
<tr>
<td>金澜金二爷（Jinlanjin）</td>
<td>2019.6.7</td>
<td>Weibo</td>
<td>Yellowfin Sole Recipe + pics, Summer Seafood and Alaska Introduction</td>
<td>2,150,000 Views</td>
</tr>
<tr>
<td>君君食尚美妈（Junjun Mom）</td>
<td>2019.6.10</td>
<td>Weibo</td>
<td>Cod Recipe for young children + pics</td>
<td>1,510,000 Views</td>
</tr>
<tr>
<td>Woody</td>
<td>2019.6.21</td>
<td>Yizhibo</td>
<td>Healthy Black Cod Recipe + pics, live stream</td>
<td>2,467,000 Views</td>
</tr>
</tbody>
</table>
• Highest performing ASMI post of Q4

• Two Nutritious Alaska Seafood Dishes for College Entrance Examination Boost

This article cheers on candidates when they take their college entrance examination.

It explains that Alaska seafood which is high in protein and low in fat, is beneficial for brain development and sight.

Alaska's natural environment is a crucial factor in ensuring freshness, high quality, and tasty seafood, while in Mainland China, the seafood environment cannot be guaranteed.

In the end, the article provides an Alaska cod and cod roe recipe.
SOUTHEAST ASIA:

Thailand, Vietnam, Indonesia, Malaysia, Singapore, the Philippines
COCHRAN MISSION AND FOLLOW UP
NORTHERN EUROPE
The UK, Ireland, Denmark, Sweden, Finland, the Netherlands
No deal...
No hope...
No clue...
No confidence

Most humiliating Commons defeat - Corbyn launches bid for No10 as in history as MPs kill off May's deal - he calls vote to spark an election

Britain's worst PM
(since the last one)

For more Weekly Little Helps turn to page 2
FEBRUARY 2019: DUTCH HARBOR, AK
Delicious firecracker salmon with England woman’s rugby star @vickyfleetwood

RUGBY WORLD CUP TIE-IN

Healthy Mind

Fish is high in omega-3 fatty acids, which are ESSENTIAL FOR BRAIN AND EYE DEVELOPMENT

Healthy Body

Eating fish has been linked to a REDUCED RISK OF TYPE 2 DIABETES and several other autoimmune conditions
EASTERN EUROPE

Russia
Ukraine
Romania
Moldova
Estonia
Latvia
Lithuania
Belarus
Georgia
RUSSIAN FLEET AND PLANT IMPROVEMENTS

As of Sept. 4, the total catch in the Russian Far East region reached 2.55 million MT, that is 0.7% more YoY, including:

- Pollock: 1.44 million MT (90,000 MT more than a year ago)
- Salmon: 439,200 MT (23.6% lower than in 2018, but 45% higher than in 2017).
- Cod: 118,100 MT (28,200 MT more)
- Pacific herring: 157,600 MT (16,600 more)

Source: Russian Federal Agency for Fisheries

Walrus sinks Russian Navy boat in the Arctic Ocean

By Rory Sullivan and Darya Tarasova, CNN

Updated 11:24 AM ET, Tue September 24, 2019

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Source: Russian Federal Agency for Fisheries
GELIOS COD & POLLOCK ROE TASTING

- Leading importer specialized in roe
- Imports +30% of total salmon roe into Ukraine
- Economic recession led to an increase in cod and pollock roe imports
- Cod and pollock roe sales during Maslenitsa and Easter Fast
- 40 stores of five chains in Kiev and across Ukraine, 162 working days.
- 400% sales increase, around 9,000 cans sold during tastings days
VICI ALASKA POLLOCK SURIMI - BALTICS

Marketing actions |
SPORT EVENTS

[Image of sushi]

[VICI logo]

[Image of two women and a mascot]

[Image of a billboard]
CENTRAL EUROPE

Germany, Austria, Switzerland, Poland and the Czech Republic
Let There Be Roe
WILDER LACHSKAVIAR AUS ALASKA

Roe, im Deutschen üblicherweise mit Rogen übersetzt, ist die wissenschaftliche Bezeichnung für eine Delikatesse, die unter Fischfleischtern besser als Kaviar bekannt ist. Vorzüglich ungefroren mit aromatischem Geschmack kommt dieser, wie könnte es anders sein, aus dem Lieblingsland der Wildfische ALASKA.

Wilderlachs-Kaviar besteht aus hochwertiger Qualität und steht mit seinem feinen Aroma für unverfälschtes Frischfleisch. Das hochwertige Produkt zeichnet sich durch eine leuchtende Farbe der Kaviarperle, die die Kaviar-Kern in Farbe und Textur an Hongkong trifft.

Drei Merkmale sind bei der Auswahl des richtigen Lachskaviars zu beachten:

1. DIE GRÖSSE DER FISCHEREI
   Je größer, desto besser

2. DER SALZGEHALT DES KAVIARS
   Je geringer, desto besser

Wildareal
Denkmalsmäßige Produkt

Durch die extremen Bedingungen und die Vernichtung der natürlichen Lebensräume ist die Kaviar-Fischerei in Alaska unter Druck geraten. Die Wildlachs- und Lachskaviar-Fischerei ist das von der overfishing und unsachgemäße Nutzung bedrohte, letzte Überbleibsel der früheren Fischereikonzerne im Holzholz. Eine Fischerei, die nicht nur die Kaviarqualität, sondern auch die Umwelt schützt.
WESTERN EUROPE

France, Belgium
These New Asian Restaurants Are Taking Over Parisian Gastronomy

Forget about baguettes and bistros: Korean fried chicken, fiery mapo tofu or thick hand-pulled noodles are the new dishes de rigueur on the Parisian restaurant scene.

By Fleur Burlet on June 18, 2019
ALASKA POLLOCK PROMOTIONS
COD & SALMON PROMOTIONS WITH DELPIERRE

In-store promotions including product samplings over two periods of a total of ten weeks
SOUTHERN EUROPE

Spain, Portugal, Italy and Greece
EL CORTE INGLES SALMON PROMOTION

- Four-page feature of wild Alaska salmon in the June 2019 edition of the El Corte Inglés magazine APTC with circulation of 500,000 copies and an advertising value of over $18,000.
SALÓN DE GOURMETS, MADRID

Frozen Alaska keta salmon fillets
Importer/distributor of a wide range of Alaska seafood products

Chef Marín presented various preparations of wild Alaska keta salmon to hundreds of HRI professionals: Tartar, keta burger tartlets, keta salmon poké
SOUTH AMERICA

Brazil, Argentina, Chile, Peru, Columbia, Ecuador, Uruguay...Mexico
ALASKA POLLOCK WEBSITE LAUNCH

LENT 2019: KETA, SOCKEYE, COD & POLLOCK PROMOTIONS
UPCOMING EVENTS

• China Fisheries Show Oct. 30 - Nov. 1
• WUSATA Taiwan in-bound mission early Nov.
• Busan Seafood Show Nov. 6 - 8
• Tokyo Sustainable Seafood Summit Nov. 7 - 8
• Seafood Expo N. America – SE Asia in-bound mission, March 19 - 21
• Seafood Expo Global April 24 - 26

Dear Hannah,

I’m writing to share some exciting news about the future of Seafood Expo Global/Seafood Processing Global and the 2021 edition. We have listened to our exhibitor and attendee feedback through the years. After careful research and thorough analysis of all options, with a goal of providing you the best possible experience, we are thrilled to announce that, starting with the 2021 edition, Seafood Expo Global/Seafood Processing Global will be moving to Barcelona, Spain!
THANK YOU!

Alice  Alysha  Nicole
Hannah  Monica