

ALL HANDS ON DECK

Conference



Japan Program

Market overview and update on tariffs/trade policy

Recent activity

Plans for additional Federal funding

Upcoming events



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- Recent activity
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**ALL HANDS
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Conference 

International Marketing Committee Meeting
November 7, 2025

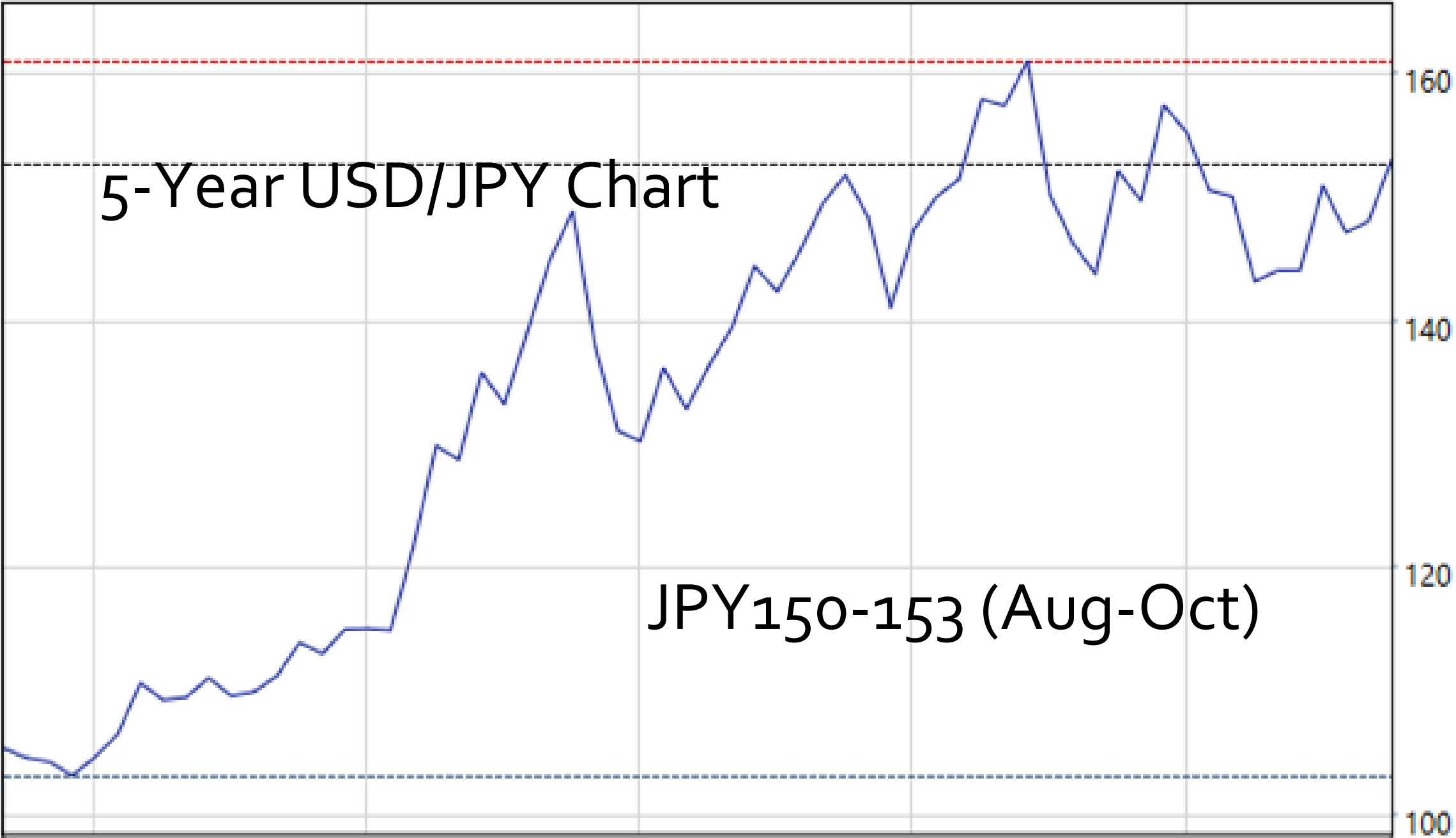


Market Overview Japan



5-Year USD/JPY Chart

JPY150-153 (Aug-Oct)



Economic Situation in Japan

GDP

+0.7% 2025 proj
+0.4% 2026 proj

Inflation

2.9% for All - Sep
+7.2% for Food

Tight labor
market

BOJ Policy rate
Steady at 0.5%

Trade balance
Deficit
234.6 Billion JPY

Wage hikes
But not enough

Topics in Seafood/ Food industry

Price Hikes & Consumer Polarization

- Cost inflation forces price increases
- Value vs Premium

The Rise of Premium Frozen Foods

- Frozen Food Sector Surges
- Gourmet & High-Value Items
- EC Expansion & Gifting

Prolonged Rice Crisis & Substitution

- Rice Price Hikes Persist
- Structural Demand Shift
- Supply Chain Risk



Frozen sushi by Michelin star Sushi restaurant
10 pieces – JPY5,000 (\$33)



Cauliflower & Broccoli as a rice substitute
300g – JPY248 (\$1.6)

Update on U.S.-Japan tariffs/trade policy

U.S. and Japan reached an agreement on 22 July

- "Strategic Trade & Investment Agreement" established to address U.S. trade deficit in July
- 15% "Reciprocal Tariff" imposed on most Japanese imports to U.S., effective Sep 2025. Auto sector included.
- Japan's Pledges: \$550 Billion U.S. Investment in strategic sectors such as semiconductors, AI, energy, and **Increased U.S. agricultural purchases & eased auto regulations**
- Initial Economic Impact (H1 FY2025: Apr-Sep): Japan's Exports to U.S. Fell by 10% YoY (Car Exports to U.S. Down by 22%)
- Japan's policy: minimize the damage by pledges, **rather than escalating the trade conflict with its own tariffs.**

vs Russia

Import volume of competing items (Jan-Aug 2025)

- Frozen Sockeye H&G: 323 mt from U.S. (@Y1,204) vs 10,704 mt from Russia (@Y1,136)
- Frozen Pollock surimi: 46,186 mt from U.S. (@Y411) vs 16,117 mt from Russia (@360)
- Frozen Pollock roe: 20,305 mt from U.S. (@Y829) vs 20,886 mt from Russia (@Y752)
- Pacific cod: 262 mt from U.S. (@Y828) vs 427 mt from Russia (@Y864) – Jan-Jul

Surimi seafood industry

- The threat of Russian surimi is increasing
- While the quantitative threat is remaining, there are also growing voices that the quality of Russian pollock surimi is improving

Competition & Challenges

Seafood
from Russia

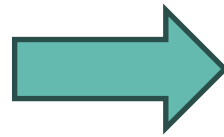
Farmed
Seafood

Aging
Population

Changing
Lifestyle

Changing
Industry

Shrinking
market



Strategies

Responsible
Seafood
Claim/CSI

"Wild is
Premium!"

Active Senior

New
Approach

New Friends

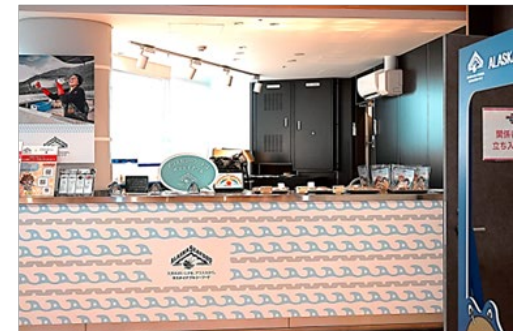
Support
Export

Recent activity



Exhibited at Gen Z's Top Media Interactive Event

- **Date:** September 20, 2025
- **Media Outlet:** ViVi
- Showcased Alaska Seafood in 3 kawaii-style onigiri (Sockeye Salmon, Sablefish, Cod roe) by Oni & Co. – a perfect one-hand gourmet
- Promoted as **Healthy, Convenient, Trendy & Sustainable** via SNS, promotional co-branded item, leaflets, Instagram Live, and on-site engagement
- Collaborated with event's official mascot for novelty goods to enhance ASMI's logo visibility
- Aimed for wider media exposure across print, online & social platforms



Strengthening Promotion of Alaska Atka Mackerel



Atka Mackerel

Promote Alaska Atka Mackerel in collaboration with multiple retailers

Support Activities:

- Provide **original POS materials** to create highly visible in-store displays
- Conduct **tasting demonstrations**, highlighting the juicy, flavorful Alaska Atka Mackerel
- **Introduce creative recipes and serving ideas to inspire consumers**
- Participate in **outdoor food events** to reach a wider audience





Atka Mackerel

Alaska Atka Mackerel – Promotion Results

- **Promotion Period & Partners:**
From June to September 2025, ASMI Japan supported promotion of Alaska Atka Mackerel in collaboration with four major retailers: **AEON Retail, RALSE, AEON Big, and Super Ichii**
- During this period, a **6-day in-store Alaska Seafood Promotion** was held, further boosting consumer engagement and showcasing the product

Total Sales: JPY 12,000K+



Showcased the taste and appeal of Alaska Atka Mackerel to a wide audience, boosting brand awareness



Certified Seafood Forum

- Certified Seafood Forum Advancing Choice in Responsible Seafood

Highlight

- **Date:** October 20, 2025
- **Venue:** The Okura Tokyo
- **Attendees:** 129 industry professionals
- Japanese seafood importers, trading companies, processors, retailers, and Japanese Government Agencies & Initiatives

- **Speakers:**
 - Mike Kraft, Executive Director, Certified Seafood International
 - Mike Koscsis, CEO, Global Seafood Alliance
 - Satoshi Matsumoto, JCCU
 - Yusuke Sato, Maruha Nichiro Corporation

- Panel Discussion



Certified Seafood Forum

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Highlight

Survey to seminar visitors shows...

- **84%** of respondents answered that they fully understood the CSI Certification Program
- **97%** of respondents answered that they are interested in future events regarding the CSI Certification Program

(# of survey responses:37)



Alaska Pollock Surimi: Brand Enhancement Initiatives



Alaska Pollock

Kibun Foods – a leading Japanese surimi manufacturer

- Developed “The Surimi”, a modern reinterpretation of the traditional 50+ year-old kanikama crab leg surimi, designed to align with contemporary Japanese food culture and lifestyles (Launched in September 2025)
- Planned and executed a communication campaign worth approximately JPY 200 million (USD 1.4 million)



ASMI Japan’s proposal to feature the Alaska Seafood logo on packaging and include clear “made with Alaska Pollock” messaging, which was adopted by Kibun.



Alaska Pollock Surimi: Brand Enhancement Initiatives



Alaska Pollock

TV Commercial



Press Event



Key Initiatives :

- Featured the Alaska Seafood logo on packaging
- Clearly indicated the use of Alaska Pollock on the product
- TV commercials highlighting the Alaska Seafood logo and clear messaging on Alaska Pollock
- Participation in the launch event
- Promoted Alaska-sourced ingredients through Kibun's website and press releases



- TV commercial expected to reach ~80 million viewers
- Press event exposure: 1 TV outlet and 75 online media, estimated ad value JPY 15.4M



Plans for Additional Federal Funding



Strategic Ad through Retail Media

To C Effective: because it's for shoppers, not just for potential consumers

- Able to reach to target shoppers directly
- Data + Survey opportunity

To B Effective: because it's another Source of Revenue

- Motivate retailers to develop and promote Alaska Seafood
- **Differentiate Alaska Seafood from Russian Seafood toward business audience**



Alaska Seafood Co-Marketing Partnership

Matching fund program to promote Alaska Seafood

- Provide promotional support for promotional activities to Alaska Seafood items carrying Alaska Seafood logo (Up to xx%?)
- Offer seafood buyers with subsidiary reason to choose Alaska Seafood

Strengthen Alaska Seafood brand

- Expand Alaska Seafood logo items
- **Differentiate Alaska Seafood from Russian Seafood toward business audience**



ASMI Japan Partner Chef Program

Background

Facing growing price competition in Japan, Alaska Seafood need to offer added value beyond its natural and sustainable positioning to remain competitive.

Objectives

- Partner with influential chefs and culinary experts as ambassadors.
- Add premium value and trust through “Chef-supervised” recipes and products
- Strengthen industry adoption and consumer promotion of Alaska Seafood.

Key Activities

- Develop ~6 chef-curated recipes annually (ASMI Japan assets)
- Feature partner chefs in trade shows and exhibitions with live demos
- Collaborate on new product development showcasing Alaska Seafood

Example Partner Chef Candidates:



Shinpei Kurihara



Ryuji



Asuka Wada



Hiromitsu Nozaki



Masahiro Kasahara



Miyuki Igarashi

Culinary Expert

Professional Chef



Upcoming Events



YouTube Collaboration with “Sakana-ya no Mori-san”

Release Date: December 20, 2025

ASMI Japan collaborate with *Asana Mori* (“*Sakana-ya no Mori-san*”), a popular seafood influencer with **over 500K combined followers on YouTube and Instagram**, who also serves as an **Alaska Seafood Special Ambassador**, to produce a new video showcasing the appeal of **Alaska sockeye salmon** and other Alaska seafood

Objectives

- Deliver authentic storytelling that conveys Alaska Seafoods sustainability and quality through the voice of a trusted influencer
- Deepen consumer understanding of the differences between Alaska and Japan’s seafood cultures
- Strengthen brand affinity and relevance among younger, food-conscious audiences through engaging, educational content



Women's Run 2026 × Interactive Puzzle Challenge

Date: March 22, 2026 (Sunday)

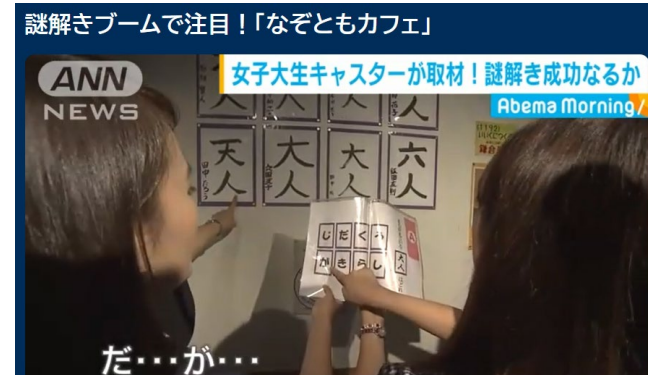
Location: Shibuya–Omotesando, Tokyo

Background

- “Nazotoki” (Interactive Puzzle Challenges) have become a major entertainment trend across Japan
- These experiences engage participants in solving clues and learning something new in a fun, hands-on way

Objectives

- Leverage the immersive and thought-provoking nature of interactive puzzle games to deepen engagement with and leave a lasting impression of Alaska Seafood
- Enhance awareness and interest in Alaska Seafood among wellness-oriented female consumers, leading to stronger brand connection and advocacy
- Encourage social media sharing and positive word-of-mouth through a fun, interactive experience



Sample of Interactive
Puzzle Challenge

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Thank you

