

ALL HANDS ON DECK

Conference



Southern Europe

Portugal, Spain, Italy, Greece

David McClellan, Regional Representative in Barcelona, Spain



Southern Europe Market Update

- Numerous smokers and importers short or completely out of Alaska sockeye and keta salmon. Those with product concerned that customers will not accept price increases.
- Strong demand for cod.
- Strong demand for Alaska pollock fillet as an alternative to cod.
- At CONXEMAR we saw more interest than ever in Alaska rockfish and flatfish.
- Fingers crossed on EU import tariffs.
- Seafood and especially salmon consumption is rising.







**SEG 6-8 May 2025
in Barcelona, Spain**

- Participating Alaska exporters reported conducting 119 significant meetings with buyers.
- The Alaska Seafood pavilion generated on-site sales of \$13,480,000 = 17 times activity budget total.
- The Alaska Seafood pavilion generated 12-month projected sales of \$171,550,000 = 220 times activity budget total.

SEG 2026: April 21-23




**CONXEMAR 7-9 Oct. 2025
in Vigo, Spain**

- Participating Alaska exporters reported conducting 106 significant meetings with buyers.
- The Alaska Seafood pavilion generated on-site sales of \$2,823,400 = 12 times activity budget total.
- The Alaska Seafood pavilion generated 12-month projected sales of \$23,337,000 = 97 times activity budget total.

CONXEMAR 2026: Oct. 6-8



Digue'ns com el necessites 
 et preparem el peix al teu gust
 i t'expliquem com cuinar-lo!

Ofertes vàlides del 19 al 23 de setembre

VOLANDEIRA
safata 6 u.

5,95€
SAFATA



CALAMAR

19,95€
QUILO

SALMÓ VERMELL
SALVATGE D'ALASKA

19,95€
QUILO



REGAL

1 ampolla
de cava brut
Nature
OVAL, 75 cl
comprant 1 peça
sencera de salmó

 **Condis**

Descobreix les
nostres receptes



 **EROSKI**

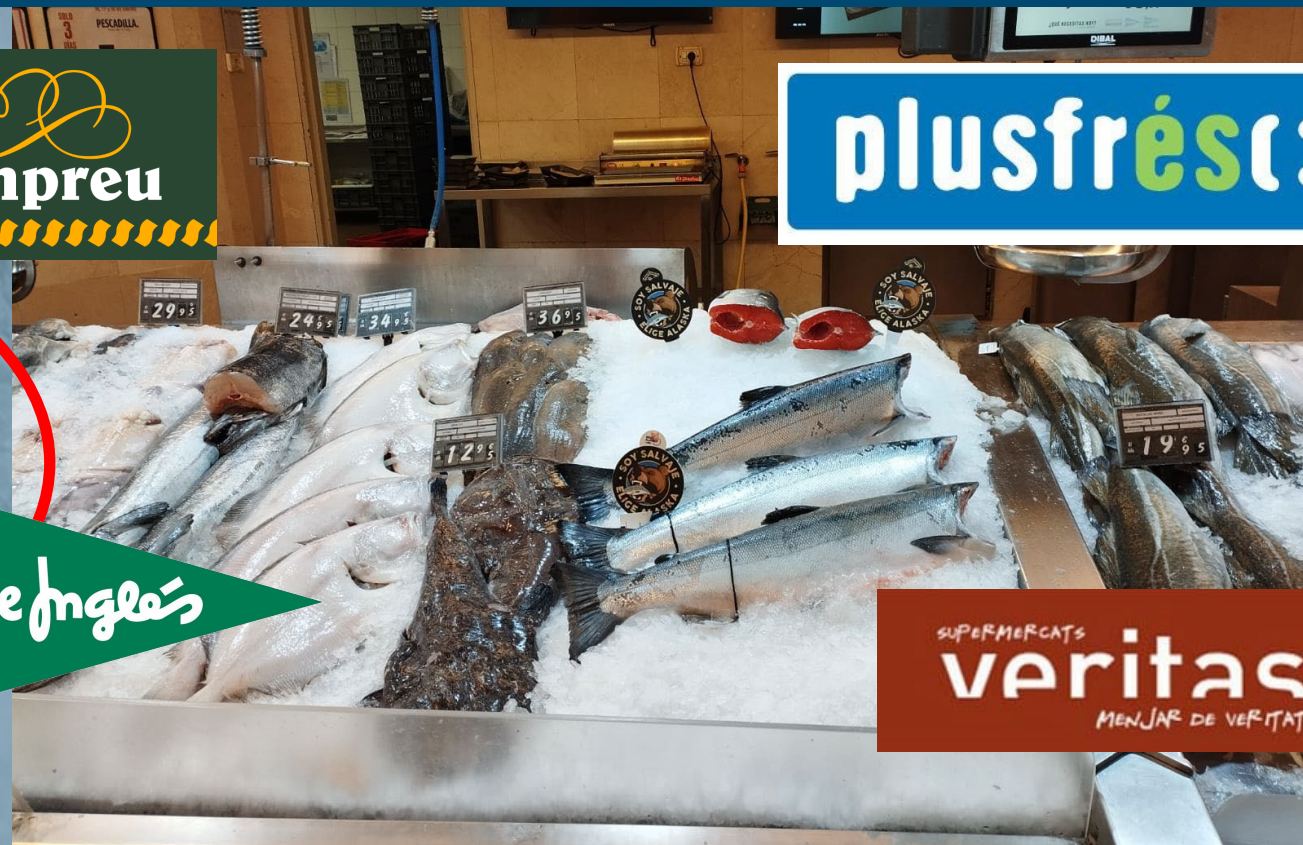
El Corte Inglés


Bonpreu

Retail Promotions of Wild Alaska Salmon:

- Refreshed H&G sockeye & coho distribution expanded from 106 stores in 2023-24 to 417 stores in 2024-25 in Spain & Portugal
- 5,477 store days of promotion of refreshed wild Alaska salmon conducted in 2024-25
- 2025-26: continue to expand distribution and sales of refreshed wild Alaska salmon in supermarkets in Spain & Portugal

plusfrésc:



veritas
SUPERMERCATS
MENJAR DE VERITAT

Smoked Wild Alaska Salmon – the leading premium smoked salmon product in Italy & Spain

Spain: smoked wild Alaska salmon retail promotions with Martiko, Vensy, and Benfumat.

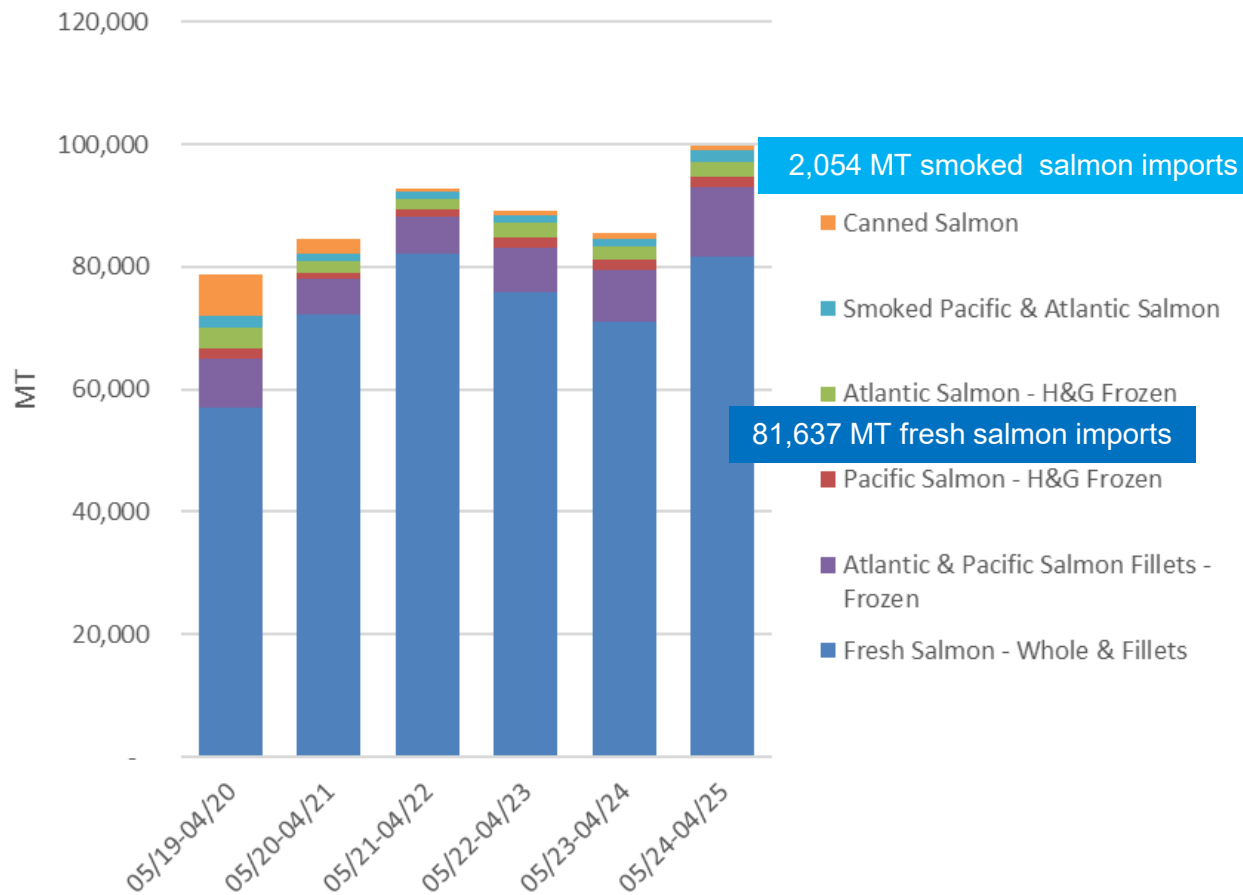
Italy: smoked wild Alaska salmon retail promotions with Foodlab and COAM

- Smoked Alaska sockeye salmon is now available in almost all supermarkets in Italy.

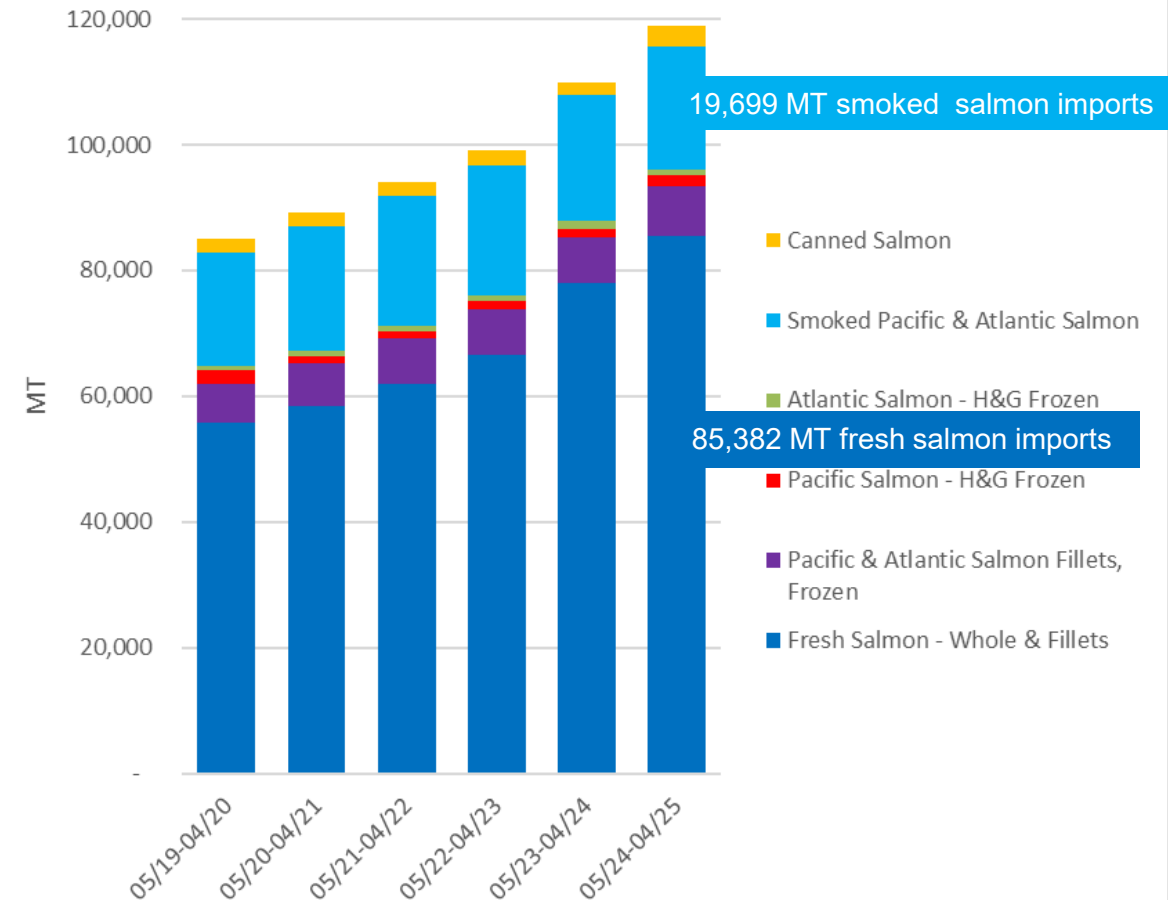


Salmon is now the n°1 fresh fish sold in Spain and Italy

Spain Imports of Salmon (MT)



Italy Imports of Salmon (MT)



Alaska Cod Promotions in Italy

Pambuffetti's Baccalà
d'Alaska promoted in 250
stores in 2024-25

Now preparing pre-Christmas
and pre-Easter Baccalà
d'Alaska campaign 2025-26



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Alaska Seafood Chef Trainings

- Conducted 30 Alaska Seafood Masterclasses for chefs and distributor salesforces in 2024-25
- Masterclasses conducted at HRI trade shows, at distributor demo kitchens, and at leading culinary schools.



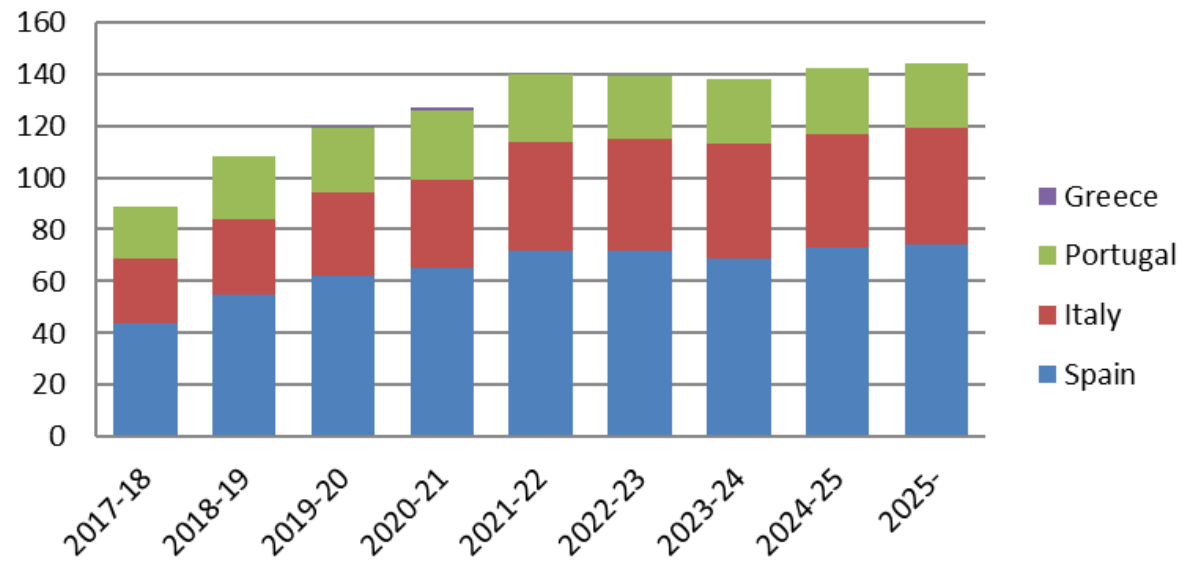
Chef Carlos Navarro & assistant conducting chef training at H&T Málaga HRI trade show on Feb. 3-5, 2025



Chef Sergio Povedano conducting live chef training at Gastronomic Forum Barcelona on Nov. 4-6, 2024



Nº HRI Distributors of Alaska Seafood in SEU





Salesforce Trainings

Alaska Sablefish Promotions

- Alaska sablefish now sold by at least 20 HRI distributors in Italy, Spain, and Portugal in response to growing awareness of this relatively new elite seafood product.



HRI Trade Shows

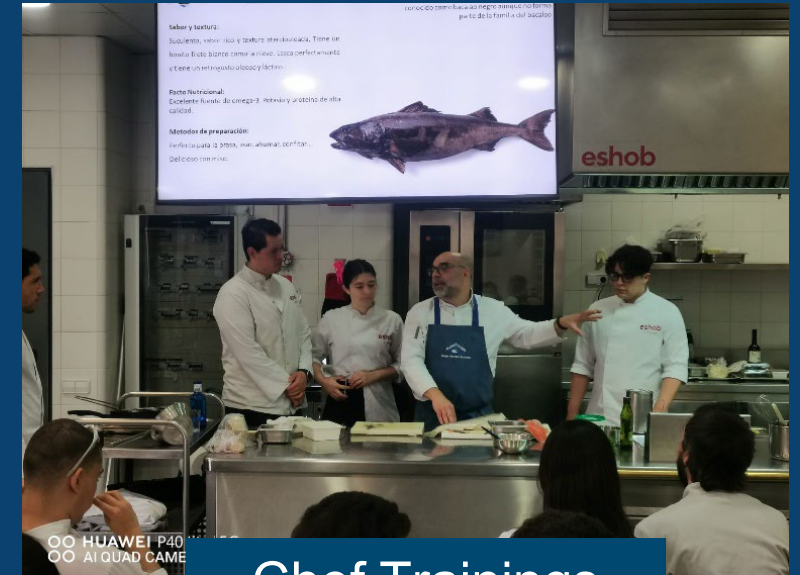
BARCELONA RESTAURANT WEEK 03-10 MAYO, 2025

SEMANA SALVAJE

JACQUELINE

GINDARA SALVAJE DE ALASKA CONFITADO CON BEURRE BLANC DE MISO Y VERDURITAS DE TEMPORADA

Wild Alaska Weeks



Chef Trainings

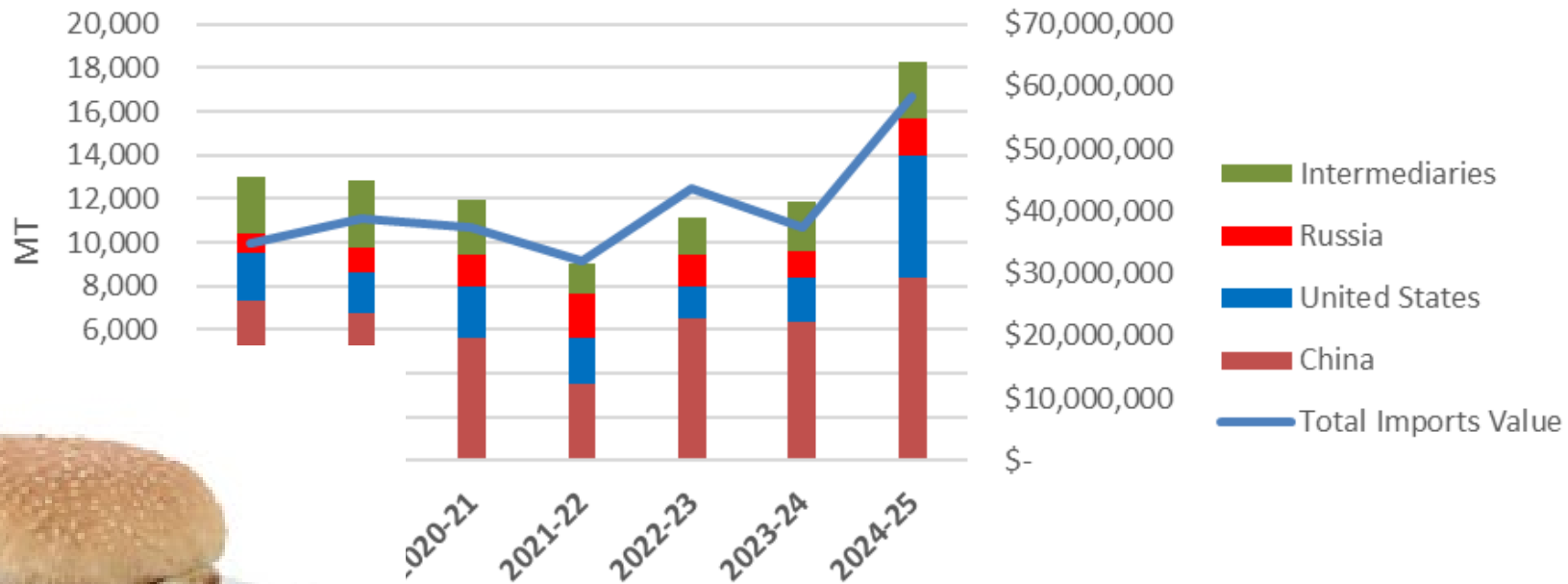
Alaska Pollock Promotions

Introducing single-frozen Alaska pollock fillet block portions to schools.

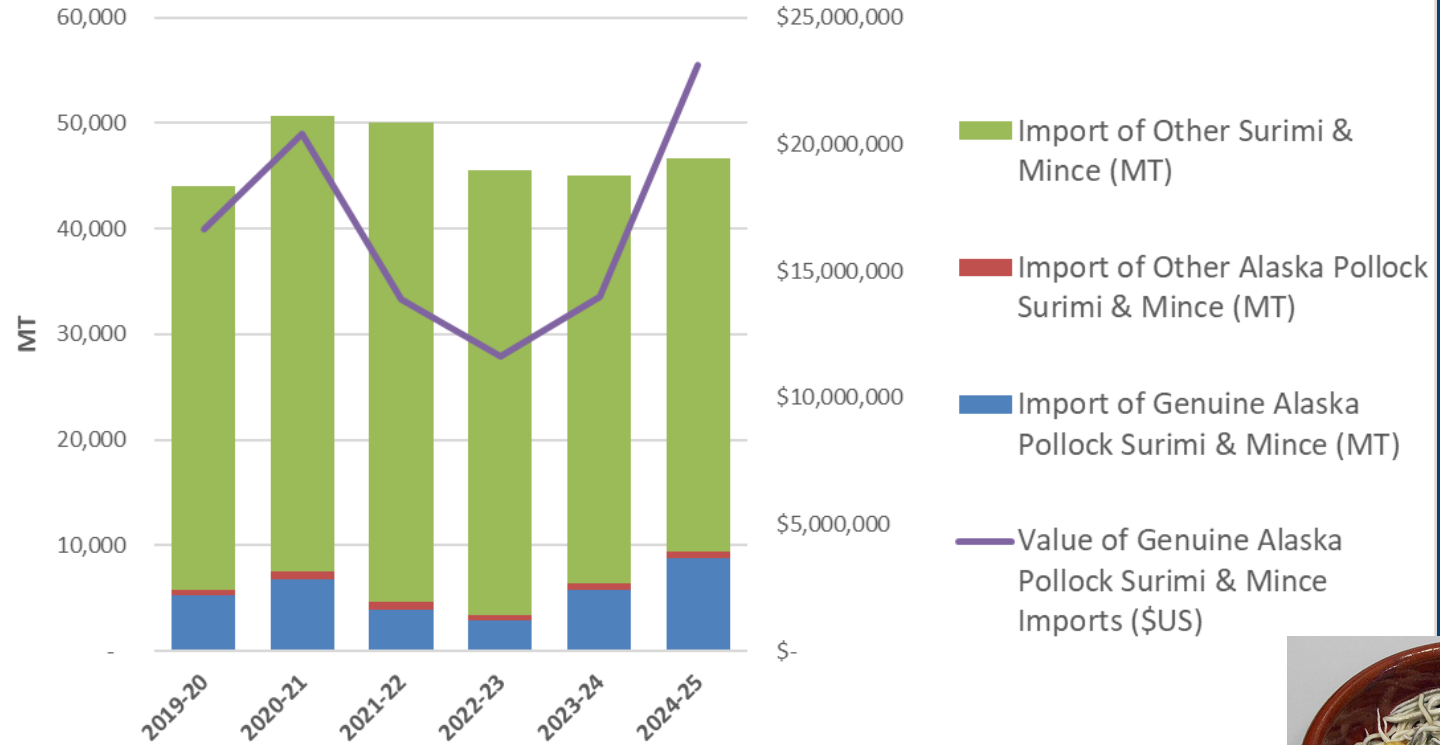
Coordinate with local distributors and their school catering customers to conduct Wild Alaska Pollock chef trainings and promotional events in schools in Spain and Portugal.



Alaska Pollock Fillet Imports to Southern Europe (market years August-July 2018-2025)



SEU Surimi & Mince Imports (85% Spain) (market years August-July)



Alaska Seafood Samples Bank - Samples of Alaska seafood products will be available in Spain in early 2026 for distribution to seafood reprocessors in Southern Europe.

Product	Format	Quantity (kg) - Up to	Quantity (pounds) - Up to	Sample Sizes
Alaska Pollock	Block frozen fillets - regular	382.5	842	49.5 lb cartons
Yellowfin Sole	H&G block	304	669	16 kg bags
Pacific Ocean Perch	H&G	144	317	16 kg bags
Atka Mackerel	H&G	400	880	44 lb cases
Alaska Plaice	H&G block	144	317	16 kg bags
Pacific Cod	J-Cut Block	181.82	400	40 lb bags
Sablefish	H&G	227.27	500	50 lb boxes
Sockeye Salmon	H&G	227.27	500	50 lb boxes
Keta Salmon	H&G	227.27	500	50 lb boxes



Opportunities in Southern Europe with additional funding



Larger-scale retail promotions

- Strengthen wild Alaska Salmon's position as the premium category of smoked and fresh salmon.
- Build retail distribution of Alaska cod and Genuine Alaska pollock products.



Larger-scale advertising campaigns

- The SEU program spends less than \$100,000/year on all its media advertising.
- Bolster SEU social media campaign boosting – currently inadequate to overcome Meta algorithm bias.

Opportunities in Southern Europe with additional funding



Build on current Genuine Alaska pollock HRI campaigns

- Trade shows
 - School caterer promotions
 - Salesforce trainings
 - Chef trainings
- Highlight quality, affordability, and sustainability.

Conduct more chef and salesforce trainings

- Trade shows
 - Salesforce trainings
 - Chef trainings
- Highlight quality, health, and sustainability.

Seafood Expo Global Barcelona

April 21-23, 2026

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Thank You!
Questions? Comments?

Do you need additional information on these markets? Please contact me at:

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