



Alaska Seafood Marketing Institute

Alaska Seafood Marketing Institute (ASMI)

**ASMI Salmon Committee Pre-Meeting**

Wednesday, October 11<sup>th</sup>, 2023

12:00pm-3:00pm AKST

**Join Zoom Meeting:**

<https://us02web.zoom.us/j/89148750704?pwd=SVpnZndCZmQwblcva2NGN0VYk2d5QT09>

Meeting ID: 891 4875 0704

Passcode: 335275

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**Draft Agenda**

**I. Call to Order**

Chair Dowie called the meeting to order at 12:03PM AKST.

**Roll Call**

**Committee members present:**

Chair Nicholas Dowie

Vice Chair Jose Montero

John Daly

Carleigh Hugh

Vanessa Aslanian

Sandy Souter

Michael 'MJ' Jackson

Robert Gershberg

Marta Heacock

Melanie Brown

Matt Alward

Ted McDermott

Alex Pihl

Eric Jordan

Ex Officio – Adam Drouhard

**Others present:**

Tomi Marsh, ASMI Board of Directors

Julianne Curry

Michael Rubino, NOAA

Sarah Shoffler, NOAA

Tessa Frost, SSRAA

Katie Goldberg, Edelman Public Relations

Sam Friedman, McKinley Research Group

LK Christensen, ASMI Domestic Marketing Committee member

Lilani Dunn, Bristol Bay Regional Seafood Development Association (BBRSDA)

Rose Bennett



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Jeremy Woodrow, ASMI Executive Director  
Megan Rider, ASMI Domestic Marketing Director  
John Burrows, ASMI Seafood Technical Program Director  
Greg Smith, ASMI Communications Director  
Bruce Schactler, ASMI Global Food Aid Program Director  
Mark Jones  
Jann Dickerson  
Margie Sherman, ASMI Communications Specialist  
Nicole Alba, ASMI International Marketing & Grants Manager  
Heather Johnson-Smith, ASMI Administrative Manager  
Leah Krafft, ASMI Domestic Marketing Manager  
Hannah Schlosstein, ASMI International Marketing Coordinator  
Sarah Wallace, Domestic Marketing Assistant

### **Approval of Agenda**

Jackson moved to approve the current agenda, and Melanie Brown seconded. None opposed; motion passed.

### **Approval of Minutes from April 11, 2023**

Sandy Souter moved to approve the minutes, Jordan seconded. None opposed; motion passed.

### **ASMI Antitrust Statement**

Chair Dowie read the antitrust statement. The statement was also made available in the Zoom chat.

### **Chair and Vice Chair Remarks**

Chair Dowie recognized these are difficult times for both fisherman and processors in the salmon industry. Chair Dowie appreciated members who are volunteering their time to improve market conditions of salmon for Alaska and called for committee members to approach solutions pragmatically. Chair Dowie noted the purpose of the pre-meeting is to establish current conditions for salmon marketing, formulation of ideas, and establishing a starting point for robust discussion at All Hands.

### **Public Comment**

Tessa Frost posted a public comment in the Zoom chat:

Hello, I missed the public comment opportunity, but I am the biologist for SSRAA, the regional aquaculture based out of Ketchikan. We had an excess of chum salmon this year that we had to pay to remove from the water because processors did not want them once the market crashed. I think there should be a focus on creating a market for pale chum salmon, even when (or especially when) the market is poor. We have a duty to remove excess hatchery fish from the water for the sustainability of our fisheries, even when the price is low. Canned? Frozen? Dog food? How can we fully utilize excess protein in the water? Thank you



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## II. New Business:

### Presentations:

- A. Katie Goldberg from Edelman Public Relations gave an update on ASMI Communications' efforts. She highlighted that they use an omnichannel approach to marketing the ease, convenience, versatility, and the wild, sustainable, and natural aspects of Alaska seafood.

Discussion: Chair Dowie thanked Goldberg for a great presentation and opened questions. Jordan asked whether ASMI is delivering meal kits to consumers. Goldberg noted that ASMI has partnered with meal kit companies in the past (Martha Stewart, Blue Apron, Hello Fresh etc) which can be revisited as an outlet for driving salmon consumption. Goldberg commented that ASMI distributes samples and products to media influencers throughout the year; currently working with New Sagaya to send product. Jackson asked if Edelman is seeing a trend of consumers moving from home cooking to dining out, and if it would be advisable to emphasize different channels to move fish directly to consumers through schools, restaurants, and cruise ships. Goldberg noted they are seeing that people are still cooking at home but that efforts to target chefs and restaurants and utilize them to educate an audience, and drive people into restaurants has been successful domestically. Curry noted that it is refreshing to see the evolution of what ASMI is working on and encourages everyone to view the presentation that Goldberg gave during the Comms. Committee. Goldberg noted Edelman are looking for spokespeople (especially fisherman) who are willing to tell the story on social media or at events. Chair Dowie asked about how the relationship between ASMI, and influencers operates? Goldberg responded: Edelman pinpoint which influencers would be best to deliver which messaging (or product to highlight), and then develop a paid amplification strategy to reach consumers or markets.

- B. Michael Rubino, NOAA Fisheries Senior Advisor for Seafood and Sarah Shoffler, National Seafood Strategy Coordinator, presented on NOAA's National Seafood Strategy Plan ([linked here](#)).

#### Four Strategy Objectives:

1. Maintain or increase sustainable US wild capture production
2. Increase sustainable US aquaculture production
3. Foster access to domestic and global markets for the US seafood industry
4. Strengthen the entire US seafood sector

Discussion: Jackson asked Rubino to expand on 'seafood as a vital part of the blue economy.' Rubino said there are two key activities they are looking at under this strategy; One is using social scientists to examine climate change impacts on coastal communities and linking up the economic market and social analysis component of what is happening with fishing stocks. Secondly, the Fishery Finance Program could potentially be utilized alongside USDA's programs, private sector finance, or foundation funding to finance some parts of the US seafood sector moving forward. Souter asked for clarification of NOAA's role in US market development. Rubino commented that this takes several forms: Office of Communications and Outreach (Seafood Month), redesigned webpages, Fish Watch has been redesigned, and NOAA can help amplify



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ASMI's messages with influencers, podcasts, video clips etc. Additional areas of collaborations include the economic and market analysis that NOAA economists provide. Souter commented that the finance program for fisherman is one of the best programs available for those who participate. Alward commented that there is another avenue in the form of SK Grants which are moving more toward marketing and promoting the development of the seafood sector. Chair Dowie asked about how NOAA imagines releasing funding, and working with different associations like ASMI in the future (through grants, partner funds)? Rubino commented that funding is a key challenge whereby we must work with existing funding and programs for the moment; choose a handful of items to work on and make a better case for funding more activities in the future.

- C. Bruce Schactler, Global Food Aid Program Director provided an update.

Discussion: Chair Dowie asked about efforts with developing nuggets. Schactler noted that one company is working on the second version of a recipe and experimenting with pink, keta, and sockeye species. Daly thanked Schactler for his global food aid work which has led to near immediate application of selling opportunities for Alaska producers. Daly noted that this committee would largely agree on Section 32 requests for canned pink talls, keta portions frozen as a new item, and sockeye salmon portions. Schactler noted that he has been reading about the farmed salmon industry increasing their market value by 35% this year, and that 500 million tons of farmed fish have been moved into the US.

- D. Dr. Jessica Gephart, Assistant Professor at American University, gave a presentation on the global seafood trade and consumption. She presented the production-trade mismatch whereby it's difficult to link the species with its country of origin after processing in intermediate countries. Dr. Gephart presented data about the market share of farmed salmon in the global marketplace.

Discussion: Chair Dowie asked about whether the US is losing market share over time to farmed salmon. Gephart responded that in the most recent years imported Atlantic salmon has overtaken about 2/3 of consumption share. Chair Dowie asked about Dr. Gephart's opinion on the impact of origin-labelling, chain of custody, and the Russia-China loophole. Gephart commented that the bill from Senator Sullivan's office creates a mandate for customs and borders to close this loophole, however, it seems difficult to implement. This is due to origin-labelling rules dictating that a product that has undergone substantial transformation gets labeled as a product of that country. Representative Hoffmans office has been looking at an expansion of SIMP to enforce closing that loophole, though there are limitations.

Discussion continued.

- E. ASMI Updates and Roundtable Discussion

- a. Megan Rider, ASMI **Domestic Marketing** Director, provided an update on activities after a previous directive from the committee to focus on wild Alaska sockeye salmon.

Discussion: Chair Dowie asked which product types are preferred for future efforts. Rider



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commented that retail and food service like to see innovative, new, value-add, and expedient-to-cook-and-serve products. Jackson asked for a status update on the Cook It Frozen campaign. Rider noted that the Cook It Frozen page is the best performing on the ASMI site, and we know consumers are hungry for that content so we can make new materials surrounding this campaign if the committee would like. Curry asked about any lessons learned or surprise successes that can be applied to other species, after receiving the infusion of funds to promote sockeye. Rider commented that executing a promotion with both an in-store and online presence that really drives sales - without losing the consumer education component - is a success. Souter inquired about programs that Domestic is developing for pink salmon going forward. Rider notes that with the support of Schactler's program expanding the pink salmon consumer base, the Domestic team created pink salmon fillet recipes to show consumers and trade that there are multiple ways to eat the species.

- b. Hannah Schlosstein and Nicole Alba from the **International Marketing** team provided an update on current promotions, future programming, and emerging market programs including the Near East strategy. They extended invitations to industry members to attend Gulfood Dubai and the upcoming Thailand trade mission in February 2024.

Discussion: Montero asked about the industry in LATAM, and whether ASMI has identified any re-processors who are interested in canning Alaska salmon. Alba responded that there is limited interest in Vietnam, Mexico, or Peru currently. However, there is some canning happening in Central America (i.e. Costa Rica) at this time. Gershberg commented that Peru, as a re-processing sector, has incredible capacity but what they lack is the sales of future value-added product. Gershberg asked whether ASMI has worked to introduce producers of value-added products with these processors through trade shows or upcoming delegations? Alba noted that this is a priority and mentioned the Boston SENA show in 2022 was an effort to facilitate one-on-one meetings with Peruvian buyers and Alaska seafood industry members. Alba notes that Peruvian companies need to find end-user markets in the US, and so we are going refocus on connecting Peruvian re-processors with local companies through inbound missions and at SENA 2024.

- c. John Burrows provided a **Seafood Technical Program Update**. Burrows highlighted that he is working on updated materials like 'Wild Alaska Seafood: Mercury and Selenium,' and 'Omega Three Types,' in collaboration with Roxana Ehsani, MS, RD, CSSD, LDN. Research and applied investigation programming updates on; NOAA SK Grants, Alaska Salmon Consumption and Reduced Inflammation for Breast Cancer (UCONN), and U Maine Study Series etc.

Jackson asked Burrows to send him the ultra-low temp on fish and longitudinal quality study from OHSU. Chair Dowie asked Burrows to send the committee a breakdown of numbers on the recoverability through origin and traceability and sustainability study. Chair Dowie asked Burrows whether he would present further about the study on sushi-



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grade fish at All-Hands. Burrows responded that it was essentially an article that sushi-grade is used largely as a marketing term, and we can have a more in-depth discussion on this in the future.

#### F. **Industry Updates Section and Roundtable Discussion -**

Chair Dowie identified issues that have been raised by the Salmon Committee already: Russia-China loophole, recessionary pressures, exchange rates, labor, fuel, cold storage costs, retail control of seafood, quality control issues on the back end, forecast for 2024, and geopolitical tensions. Chair Dowie noted products that have been identified by the Committee for emphasis are tall canned pinks, pink salmon roe, chum sales, and continued sockeye promotions.

#### **Species Updates:**

##### King Salmon

Jackson commented that this Committee might need to address public perception of king salmon so that the public does not think of orcas. Jordan appreciated ASMI's Executive Director assisting with king salmon issues around orcas.

##### Coho Salmon

Heacock commented that in speaking with people in a retail and consumer capacity, there is a negative perception with the brand currently, due Bristol Bay ex-vessel prices. Chair Dowie thanked Heacock and commented that he has spoken with industry members that industry is potentially looking at a traditional processor-model and understands that this could be affecting market perception and messaging. Woodrow commented that ASMI has heard that there is confusion both within and outside the industry. Woodrow noted that the ASMI Board has penned an article in National Fisherman to educate readers and to demonstrate where those pinch points are throughout the supply chain. Curry commented that the price of seafood dockside is a global issue. Curry noted that she would like to hear expanded perspectives from the ASMI family generally and the Salmon committee about how to approach that messaging at All Hands.

##### Pink Salmon

Daly commented that canned pink salmon is an item with reliable distribution, products are facing downward pressure coming off a large year and due to what Russia has available. Daly notes that downward pressure is not necessarily negative and can drive volume noting that canned pink and frozen pink salmon portions are going to be important items to carry forward (specifically domestically). Chair Dowie commented that he and Vice-Chair Montero have a long list of ideas for driving pink salmon fillet promotions, but that all Committee members should reach out with other concepts. Jackson is hearing about overabundance of hatchery fish and their effects on wild stocks, and suggests the Committee creates messaging for these issues.

##### Keta Salmon

Jackson noted that trade magazines are reporting on bycatch in chum fisheries, and this could result in pitting one species over another; he remarks that we require further ASMI-led communications strategies. Vice-Chair Montero stated that we are losing the value-added dry



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market for chums due to pricing, and we should explore how to revitalize that. Daly said that of the 22 million chums caught last year, half of that number were 2-4's (which historically has a limited market). Chair Dowie asked Daly about his opinion on pet food as a product-form for lower quality chums. Daly's response was that the pet food market is growing and the difference in revenue back to Alaska is significant when you are utilizing fish for that channel (meal, mince, pet food protein of any sort), but there are challenges in that market. Daly remarked that best efforts are focusing on how we can handle difference with under 4's, pale fish, and a challenged Chinese and European market; and notes that focusing on strengthening the domestic market is a good application.

### Sockeye Salmon

Souter reported that significant 2022 sockeye stocks remain on the market at a high price, and it is moving out slowly so there is a need to continue sockeye promotions. Chair Dowie asked Committee members to rank the percentage of marketing efforts they would assign to each species. The Committee initially speculated that ASMI should probably emphasize efforts approximately 40% on pinks, 30% on sockeye and 30% on chum. Souter noted that the USDA program has been positive for pink salmon but posited whether ASMI should rely heavily on that program for pink salmon in the future. Daly commented that he attended the USDA vendor meetings recently, and they tripled their aquatic food spend over the last few years. Daly added that there is a limited market for value added or frozen pink currently so the USDA has provided mass distribution to end users that results in organic growth in demand for value-added products.

### **III. All Hands Preparation comments**

Chair Dowie opened comments for All Hands preparation.

Pihl posed the question for All Hands; if we put more effort into sockeye, do the other species follow suit and naturally float up as well.

Aslanian noted pink and chum are almost equal in her mind, and she highlighted that Arctic chum moves well domestically.

Hunt commented that sockeye should still be a main item to focus on, followed by chums, and pinks.

Hunt said that we should focus on more domestic market outside of USDA for pinks and chums and building that market outside of China and overseas.

Brown commented that it was difficult to see fish this season not valued for their quality. She hopes that we can rebuild the wheel in a way that it works well for all tiers of industry.

### **IV. Good of the Order**

Chair Dowie thanked ASMI staff and attendees for their time and noted that Committee members can send Vice-Chair Montero and Chair Dowie comments preceding All Hands. Krafft read Tessa Frost's public comment that is listed in the 'Public Comments' section of these minutes. Chair Dowie noted that the Board's questions are available, and the entirety of the All Hands meeting will be spent in discussion of those.

### **V. Adjourn**

Montero moved to adjourn. Motion was seconded by Aslanian. Motion passed and the meeting



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was adjourned at 3:00pm AKST.

DRAFT