



Alaska Seafood Marketing Institute

INTERNATIONAL MARKETING COMMITTEE MEETING

Nov. 3, 2023

9:00 a.m. – 4:30 p.m.

Mid Deck (lobby level), Captain Cook Hotel

<https://us02web.zoom.us/j/89546451040?pwd=MIUxSzVFZlhQWWFmRzVMSldvV1EzZz09>

Meeting ID: 895 4645 1040

Passcode: 660786

Draft Minutes

9:00 a.m. **INTRODUCTION**

A. A meeting of the Alaska Seafood Marketing Institute (ASMI) International Marketing Committee (IMC) was called to order at the Captain Cook Hotel and on a public Zoom meeting, by Chair Soerensen at 9:33 am.

B. Roll Call:

Committee Members Present

Rasmus Soerensen, Chair

Bob Barnett, Vice Chair

Shigeki Okano

Michael McGinley

Stephen Rhoads

Alan Gross

Joel Peterson absent, proxy Brody Pierson was present

Julie Yeasting

Frank O'Hara III

Bart Lovejoy

Jeffrey Stephan

George Li

Richard Riggs

Tomi Marsh

Not present:

Duncan Fields, Board Member

ASMI Staff and OMRs

Hannah Lindoff, Senior Director of Global Marketing & Strategy

Nicole Alba, International Marketing & Grants Manager

Hannah Schlosstein, International Marketing Coordinator- Asia

Susana Osorio Cardona, International Marketing Coordinator – Europe

Megan Belair, Assistant International Marketing Coordinator

Roger Zhang, ASMI China

Stephanie Pan, ASMI China

Yuka Inui, ASMI Japan

Akiko Yakata, ASMI Japan

Jens Hombeck, ASMI CEU & WEU

Ksenia Gorovaia, ASMI Eastern EU

David McClellan, ASMI Southern EU

Claudia Lecarnaque, ASMI Latin America

José Madeira, ASMI Latin America
Tim Welsh, ASMI Southeast Asia
Sarina Welsh, ASMI Southeast Asia

C. Approval of Previous Minutes

Michael McGinley moved to approve the minutes; Alan Gross seconded. No objections, motion passed.

D. Announcements

Chair Soerensen thanked the CAP members Jens Peter Klausen of J.P. Klausen and Co., and Gao Linming of Qingdao Yutai Import and Export for attending. He thanked departing IMC member, Phil Young, for his time. Welcomed Stephen Rhoads to the Committee.

E. Anti-Trust Statement was made available to committee members

F. Introduction of Guests/Visitors

Jeff Ottness, OBI Seafoods

Virtual Attendees:

Michael Durtschi, Commercial fisherman

Ron Rogness, GAPP

Amber Dowie

Victoria Caltagirone, State of Alaska Dept. of Commerce, Office of International Trade

Tony Macedo, North Point Seafoods

G. Public Comment

No public comment.

9:15 a.m. **REPORTS**

Chairman's Report and Comments

Chair Soerensen noted that this is a difficult time, and the industry is being affected by more factors than ever before. He noted that forecasting is difficult, and everyone was surprised by the markets in 2022. While the industry knew there would be corrections in 2023, the severity and magnitude of correction has been surprising. He commented that labor is an issue, geopolitical challenges are posed around the world, and cold-storage congestion caused by a change of global flow through pandemic years is difficult. He summarized that the work of ASMI has never been more important, and we also have light at the end of the tunnel. If industry can cope with changes, we can do promotions again, and conduct activities in areas we have never been involved in. He said he was looking forward to OMR presentations, and that we have work to do in the coming years. He thanked everyone for their time and energy today.

Vice Chairman's Report and Comments

Vice Chair Barnett reiterated that what Chair Soerensen said holds true to everybody. He reinforced that Chair Kimball's description of the current climate being a 'williwaw' was very apt. Industry needs to look at the options to conquer this, remain diligent, and maintain the quality of our product. Between quality and story, we can dominate the challenges ahead. Vice Chair Barnett encouraged all committee members, staff, and OMRs to have input during these meetings and noted that he appreciated the opportunity to be Vice Chair.

Program Director's Report and Comments

Director Lindoff gave an overview of tasks that need to be accomplished today. She noted that we will discuss a new funding stream but first need to look at reports from species committees and reflect on those questions throughout the meeting. She said that Chair Soerensen will present to the Board with direction from the IMC. We will also need to strategize about the upcoming application for RAPP funds.

9:30 a.m. **Species Committee Feedback Review**

Whitefish Committee: O'Hara reviewed the Whitefish Committee's remarks: the quickest fix to low prices is low prices. O'Hara said there was an emphasis on wild caught in Alaska, and specifically highlighting the USA

origin. WASA and GAPP are doing a lot of research for this, so the recommendation from whitefish was to look at that research.

Committee answers [available here](#).

Halibut/Sablefish Committee: Barnett highlighted the goal to create an educational campaign about how to cook/cut/add value to smaller sablefish. Barnett shared the committee recommendation to utilize consumer buying behavior research to target precise audiences.

Committee answers [available here](#).

Salmon Committee: Yeasting shared the salmon committee's focus which was an emphasis on trade promotions in Europe, and a tinned fish workshop prior to SEG.

Committee answers [available here](#).

Shellfish Committee: Jeff Otness noted that the shellfish committee didn't have many recommendations for international markets. There might be some need in Japan, but the committee are largely focused on the domestic market.

Committee answers [available here](#).

9:45 a.m. Culinary Retreat Recap

Megan Belair gave a presentation to the committee about the culinary retreat from 2023. She invited industry members to participate in the culinary retreat in 2024 at Tutka Bay in Homer (June 11-14, 2024).

10:00 a.m. Federal Funding Update – RAPP

Lindoff notes that ASMI has an opportunity to receive a portion of 1.3 billion dollars through new funding called RAPP (Regional Agricultural Promotion Program). Lindoff noted we have asked the OMRs to focus on volume and brand building highlights to see where we can capitalize on this funding. She notes that the funding has geographical restrictions, but ASMI will for sure be able to focus on S. America and SE Asia. The first tranche of funding will be utilized for 20 months, and then we *might* be able to expand our markets in later years, to new locations. November 17th is the date of announcement, and the NOFO will be available shortly thereafter.

Soerenson asked if we know how much the funding will be.

Lindoff responded that the first tranche of funding will be 300 million dollars to be spent over 20 months. That is the same amount that ATP was over its five-year lifespan, and ASMI received 7.5 million of this total.

Barnett asked if RAPP is part of the Farm Bill?

Lindoff noted that this funding opportunity is not part of the Farm Bill. This money has been released from the CCC, and FAS have the authorization to disperse it. Lindoff notes that by July 1, 2024, there is hope that the government will re-fund the Farm Bill. There is also a push to double the funding available in MAP funds which will be helpful to those other cooperators who will not be eligible for RAPP funding.

10:30 a.m. OMR Presentations- EEU

Ksenia Gorovaia gave a presentation about the EEU market.

Barnett asked about whether consumers in this region get the answer about Alaska species from ASMI whenever they search it? Gorovaia noted that yes, consumers are directed to the ASMI website, as the top hit because we have dedicated money to that optimization. Soerensen returned to a question that Gorovaia asked during her presentation, about putting the logo on products that might not be of the highest quality. He asked for industry member comment.

Yeasting noted that she thinks the ASMI logo belongs on every product, and we need markets for all quality levels. If you can confirm that it is Alaska seafood then the logo belongs on that product. Soerensen agreed that it would be difficult for us to be judge and jury on quality level in the seafood market. McGinley agreed with the other committee members and advocated for keeping the ASMI logo on everything as well. Gross noted that he thinks it is going to be difficult to separate hatchery fish from wild caught fish, and he would like the ASMI logo on everything. Yeasting commended Gorovaia for her use of social media and how it expands ASMI's reach. Yeasting is impressed with the way Gorovaia shares her experience, knowledge, and

stories and is appreciative of her work.

10:50 a.m. **NEU**

Alicia Parker gave a presentation on the Northern Europe markets.

McGinley asked about what products sell best in Sweden. Gorovaia noted that they consume a lot of pollock in fish finger product forms. She noted that the Swedish community have traditional dinners that pollock is a naturally good fit for. Gross asked about whether ASMI has a platform for sharing work or ideas between OMRs? Parker noted that we have meetings twice a year to share things with individuals, and then there is an imagery database, and we are in constant communication.

Soerensen was excited about the canned salmon campaign. He said that we do have the products that the consumer wants and noted that canned seafood is having a bit of a renaissance at the time. In Portugal there is an entire store to purchase canned fish and there might be something that we can do to make Alaska seafood more 'sexy' in other markets for canned salmon. Parker noted that the cans can be updated, edited, and made to be a bit more attractive to consumers. We are looking at ways to make it sexier, without being able to change the product.

Yeasting asks about the opportunities in the UK for pollock? Parker notes that they have just recently supported a frozen pollock filet bag in the UK, and this is the way forward versus refreshed.

Okano asked about smoked wild salmon sales in the UK?

Parker noted that overall seafood sales in the UK are down, but potential sales for smoked products are looking strong. In the UK market, at the end of the day, smoked salmon is an available and popular product. O'Hara noted that in the highly debated topic of flat fish naming, all around the entire planet, there is one country that calls it yellowfin sole and that is the UK.

McGinley inquired about whether there have been any major duty rate changes in Europe, outside of the UK? Parker noted that there have not been any major changes of late.

11:10 a.m. **SEU**

David McClellan gave a presentation about the Southern Europe market.

O'Hara asked about ASMI's marketing presence in Greece, McClellan noted that there is a lot of niche potential in Greece, and hopefully we will be ramping up promotions in the country soon. O'Hara saw yellowfin sole in two grocery stores and saw freezer chests full of red fish during his time in Greece. Yeasting noted that Morocco has great reprocessing potential, and inquired about how we see that intersect with Spain and Southern EU.

McClellan commented that a lot of seafood processing and movement of products are traveling up from Morocco already, so the systems, logistics, and transportation exist. It is just a pull of getting Alaska seafood products into Northern Africa. Soerensen applauded McClellan's team for their work on the SEG and CONXEMAR booths.

11:30 a.m. **SE Asia**

Sarina and Tim Welsh gave an update on the market in Southeast Asia.

McClellan asked further about the chef's table events. Sarina Welsh spoke with McClelland about the creation of the booth at Seafood Expo Asia, so there were two-hour slots of eight seats each. Welsh prepared the invitation, and the importer could invite eight people for each of the two hours in the session. During this time Chef Elvin would then only cook products from each of the importers. Chef Elvin also supplied the public with samples. Welsh noted that Seafood Expo Asia was the same week as the F1 race, so it helped generate visibility for ASMI. There are opportunities to capitalize on the sustainability focus and halal foods in Singapore.

Yeasting asked about where the SE Asia team saw opportunities to allocate more funds when RAPP is approved. Welsh noted that he is excited about the potential in Indonesia and Vietnam so they would focus

on ramping up promotions in those countries.

Soerensen asked about social media in the region. Welsh noted that they have six regional webpages, and social media pages. But, she noted, that cooperative promotions tend to have a better bang for your buck and there is more visibility on a larger platform.

11:47am – Soerensen recessed the session for lunch.

12:00 – 1:00 p.m. **Lunch**

1:00 p.m. OMR Presentations continued – **CEU**

Jens Hombeck presented on the program for the Central Europe region.

Soerensen asked about the effects of the prevalence of high prices at retail while raw material prices are coming down. Hombeck explained that consumer memory is short, since they are continuously looking for good deals, they might not notice that discount prices are still high. Prices are not coming down quickly and are not expected to fall back to pre-inflation levels. He added that emphasis was being made on crucial aspects of the product other than price, such as sustainability, and that unusual but memorable placements and collaborations were being implemented through a guerrilla marketing strategy in order to support such efforts.

Soerensen asked about the potential for Poland becoming a target market for canned salmon given that it is a seafood-eating nation, and that purchasing power is on the rise. Hombeck explained that price point could be an option to enter the market, and that the canned sector is accepted, but would require education. In relation to flatfish activities, Hombeck explained that a rocksole promotion had just been completed in Germany and that the same activity type would be adapted for yellowfin sole (YFS) in France. In Germany, YFS can only be marketed as dab, which is an advantage given that it places it in the same category as rocksole. Efforts are being made in the region, including in Poland, to encourage trade to add YFS to their assortments. In general, flatfish is a big category in the EU resulting in great potential for Alaska flatfish.

Yeasting asked about double frozen Russian raw material entering Germany and about the possibilities around using RFM to counter it. Hombeck replied that it would require a large-scale education campaign because most consumers are not aware of RFM. In fact, they are only familiar with MSC labelling without even understanding its meaning.

Soerensen asked about EU consumers interest in moving away from Russian-origin seafood and towards other origins for their healthy protein choices. Hombeck explained that consumers were resistant to Russian seafood at the beginning of the invasion of Ukraine. However, pollock remains the main challenge because the industry depends on Russia for volume, resulting in the continued use of Russian origin seafood without necessarily calling it out (packaging merely states FAO harvest region, without mention of Russia or Alaska). Given the lack of clarity, consumers could be scared away from purchasing pollock altogether if faced with these concerns.

1:20 p.m. **WEU**

Jens Hombeck presented on the Western Europe region.

Barnett asked about planned cooperations in connection with the Paris 2024 Summer Olympics. Hombeck mentioned being in contact with the US Embassy in Paris, the possibility of deploying the Alaska seafood food truck at certain events, and that cooperations with fitness and sport influencers highlight that Alaska seafood is the best fit for such activities.

Young asked whether the activity with first year university students was still in place. Hombeck replied affirmatively saying that a form of this program was still being conducted with culinary schools and highlighted the potential of sablefish introduction in such activities.

1:30 p.m. **Latin America**

Claudia Lecarnaque and Jose Madeira presented on the Latin American region.

Soerensen asked about the even broader geographical area that is now covered by the program. Madeira explained that it has a good footprint in Brazil, Colombia, Chile, and Peru and that they hope to start participating in tradeshows in other parts of the region and continue their strong presence in social media (1.2 million followers on Facebook).

McClellan thanked Lecarnaque for spearheading the Alaska Legislative Trade Mission to Spain and Portugal, which took place simultaneously with ASMI's participation at the Conxemar trade show in October 2023.

1:50 p.m. **China**

Stephanie Pan and Roger Zhang presented on the China and Hong Kong program.

McGinley asked about the situation of re-processors continuing to purchase Russian-origin raw material in the context of the US' political view stance. Zhang said that the number of Russian nationals coming to do business in China is increasing. The program continues to work with importers that are loyal to Alaska origin seafood, especially for Alaska pollock. It is necessary to continue to educate consumers about quality, appealing to the consumer through low pricing strategies at retailers. It is also important to continue working with the Alaska seafood industry to give Alaska pollock and seafood in general more exposure.

2:10 p.m. **Japan**

Akiko Yakata and Yuka Inui presented on the Japanese program.

Soerensen congratulated the Japanese team on the partnership with Family Mart for promoting sustainability in association with Alaska seafood. Yakata expressed her appreciation for trade members in Japan, highlighting the importance of continuing to work together.

Welsh asked about the possibility of having approached Family Mart first in lieu of 711 to secure a partnership. Yakata explained that they approached Lawson, three years ago but it did not take off at that time. She also announced that there are sablefish products with different marinades and sealed with nitrogen coming to Family Mart. Barnett suggested exploring the possibilities for canned salmon in the market.

2:30 p.m. **Open discussion on strategy for upcoming RAPP application**

Lindoff gave an update to the committee on the information made available so far by USDA/FAS about a potential Regional Agricultural Promotion Program (RAPP). She explained that the development of the Middle East and North Africa (MENA) regional market for Alaska seafood would be made possible through RAPP funding, based on the results of the Emerging Market Program (EMP) which highlighted Morocco as the recommended starting point in North Africa, and other industry insight about the Middle Eastern markets. Currently, ASMI's participation at Gulfood 2024 trade show in Dubai will be possible thanks to Global line funds, which could be freed for other activities if RAPP funding was an option. She noted that LATAM and SE Asia would also fall within the scope of RAPP, allowing for further growth of these two markets, which ASMI started developing thanks to the Agricultural Trade Promotion Program. The emphasis in this first application needs to be on activities that can be implemented quickly. There will be opportunities to apply for new markets/regions in the near future given that RAPP will be a longer term, multi-year program.

Yeasting asked whether it would be best to divide the LATAM region into South and Central America for this funding application. Madeira explained that the program has so far focused on Mexico in Central America, and Brazil, Peru, Colombia, and Ecuador in South America, and that further exploration of the Caribbean region is needed in order to make that determination. Lindoff added that, from a programmatic point of view, the new regions funded by RAPP would bring a lot more work so further division of the LATAM region might not be the first approach for this application period.

Soerensen spoke of two possible approaches: already established programs (LATAM and SE Asia) and exploratory ones (MENA and India) and asked if it would be possible to apply for all. Gross asked if more staff could be hired in order to cover the additional workload. Lindoff explained that it was a possibility depending on the actual funding awarded.

Based on their extensive experience with other US commodities in Middle East, Welsh and McClellan suggested the establishment of a representative in UAE or Qatar as a first step to tap into the high purchasing power in the area. There is a considerable interest in Alaska seafood in the region, and there is potential for both processing and consumption. They added that Southern Asia also has a lot of potential as a middle-class consumer market with 300 million inhabitants in India alone. McGinley agreed with their comments in regard to the high-end sector with a multitude of restaurants and a small population interested and capable of purchasing premium products. He suggested focusing on Morocco for reprocessing and getting samples into the MENA region and exploring India with a research grant. Welsh further explained that Dubai and Singapore manage the wealth of Indian, Kenyan and Pakistani accounts and could be of great help for getting into the South Asian market.

Soerensen re-centered the discussion and asked Lindoff to summarize the proposed action plan for the RAPP application. She spoke of applying for the MENA region as a new addition, to address both Middle East and North Africa and as a possibility to subsidize activities, such as the international culinary retreat and other global activities, in markets that cannot benefit from RAPP funds. The second element of the application would be LATAM and SE Asia as regions in scope of RAP that could be further developed in the near, leaving the exploration of South Asia for subsequent application.

Soerensen and Yeasting gave their support to the proposal as a way to continue what was started with ATP and highlighted the great timing of it giving ASMI's upcoming participation at Gulfood 2024. Lindoff added that this could also positively impact the European markets, not in scope of RAPP.

3:30 p.m. Operational Committee Board Recommendations

IMC members discussed and answered the five questions to be considered by the Board of Directors at their meeting on Nov 4. Please see *Annex 1. 2023-All-Hands-Operational-Questions_Answers International-Marketing-Committee*.

4:30 p.m. Adjourn

Soerensen thanked all attendees and encouraged OMRs to spend time with industry before departing. He also thanked Lindoff and international program staff at ASMI for all their work.

Stephan asked about date for the next meeting and Lindoff note that a poll would be sent at a future date.

Young thanked ASMI and industry members for their insight and appreciated the opportunity to participate in the discussions.

Barnett moved to adjourned, Rhoads seconded. All were in favor, motion passed.
Meeting adjourned at 4:35pm AKST.



2023 ASMI All Hands on Deck

Key Questions for Operational Committees – [International Marketing](#)

1. What should ASMI do to make an immediate difference in the marketplace?
 - Emphasize Global Food Aid program in order to move product in large quantities.
 - As recommended by the whitefish committee, highlight country of origin, product of the USA and wild caught in Alaska. Focus on markets that have a positive relationship with the USA, and appreciate the gold-standard fisheries management process that Alaska has. Put the Alaska seafood label on all products to grow visibility at a consumer level. We must enhance the messaging, and think of how to get it out louder, and broader.
 - Create messaging to differentiate the gear type labelling, and catch methods along the entirety of the supply chain to educate individuals and expand messaging to demonstrate the carbon footprint efficiencies, and lower fuel consumption of this industry. We need tools to tell that positive story.
 - The committee suggested pushing legislators to develop better universal monitoring of catch certificates such as seen in the EU. Accurate supply chain documentation is crucial to industry

2. What resources can ASMI provide to best help harvesters?
 - Harvesters need to understand what ASMI is doing. More communication and transparency will help, may it be through social, at events, with committee members acting as ambassadors, etc. As stated at the halibut sablefish committee, regardless of the issue, we understand now that we need to operate with mutual trust and expand transparency for harvesters.
 - Poor handling can create issues with buyers down the line. We would like the Technical program to create education around the effect of handling on the product to the harvesters in net caught fisheries (especially salmon). Tools to improve the quality of the product and doubling down on the messaging to the fisherman that time and temperature affect the fish. The materials already created are popular, but more is needed.

3. What long-term challenges must your program continue to monitor and/or address?
 - In all programs, we've got to correct misinformation and be diligent in addressing false claims.
 - The large margins that retailers are maintaining currently are an issue and should be monitored.
 - ASMI needs to start considering how to separate Alaska seafood sustainability or responsible management from the rest of the brands making sustainability claims.
 - ASMI must continue making sure we have diversified reprocessing centers. Trade and inbound missions have been effective and growth has occurred. Continuing to ensure the Alaska seafood industry is present in those areas and diversifying reprocessing options is vital.
 - The industry needs help to market the Alaska seafood sector as an attractive place to work.

4. Please address the comments from the species committees that were directed toward your program. In response, do you have any recommendations for which your operational program

should take action?

- **Whitefish**
 - Double down on country of origin and call out wild caught Alaska, USA.
 - For pollock and other whitefish, communicate the value of the product to consumers through social media and other promotions.
 - **Salmon –**
 - The committee embraced the idea of a canned salmon seminar at SEG and discussed a chefs table/tinned salmon educational workshop which can start with the OMRs.
 - The committee agreed that we should continue promotions of tinned fish in the UK and were pleased by recent efforts. They also want to continue to push the canned fish trend beyond the UK. The quality of canned salmon needs to be highlighted and promoted.
 - The committee requested feedback from OMRs about the trends in canned fish around the world
 - **Halibut/Sablefish –**
 - The promotion of small sable fish with chefs has already started and the international program should keep it up.
 - In order to promote sable fish to smokers in Europe, we'd like information from the technical program about best practices for smoking sable fish.
5. Is there an action that this committee recommends the board consider at All Hands or in the near future? If not, write N/A.
- The committee was pleased to have the meeting back in Anchorage, although the technical issues at this venue were extreme and more support is needed in the future. The format of All Hands could be tweaked to better use the CAP. The Circana data was very useful and a deep dive at another topic next year would be great.
 - The committee requests that ASMI use its services to provide additional data such as the export and harvest numbers of global competitor fisheries.
 - In the future, it would be good to give the industry a refresher on RFM, how it's evolved and where it's going. This is a suggestion for All Hands next year.