Season EEU 2020/21. Retrospective

**Total imports from Alaska to EEU**
2014-2021

**Pink salmon and salmon roe imports from Alaska to Ukraine**
2014-2021

**Groundfish and pollock surimi imports from Alaska to Lithuania**
2015-2021

**Imports from Alaska to EEU - market shares by country/specie**
Value, 2021

- 16% — Ukraine salmon
- 21% — Ukraine salmon roe
- 9% — Ukraine pollock
- 12% — Lithuania sockeye
- 10% — Lithuania salmon roe
- 17% — Lithuania surimi
- 15% — Other

*NMFS export data
Season EEU 2021/22. Retail merchandising
Season EEU 2021/22. Salmon roe

**PR campaign NY 2022.**
Articles in on-line media on benefits of Alaska salmon roe. Ukraine

**In-store promotion**
in Rimi. Lithuania

**Recipes for the NY table**
Created and shared by chef influencers. Ukraine

**Co-branded package**
with Scandinavia Seafood Company.
Lithuania.
**KOLs cooperation**

New Year salmon roe promotion for EasyFish

Украина

количество Омега, как икра.

Знаете, моим ликом икра соприкасается, не априори рецепта и пропорции ваг, когда делаются рейсы 100% превосходных резул. Очень вкусный рецепт и ооо тарелки в кури на фасольи аля-силя. Если же варится на гриле или в кури на аля-силя.

Понадобится:

- калории в виде 150 смешивания
- 150 грамм в виде 150 смешивания
- 150 грамм в виде 150 смешивания
- 150 грамм в виде 150 смешивания
- 150 грамм в виде 150 смешивания

Для приготовления:

- готовить 15 минут

Примерно 12"
Season EEU 2021/22. Salmon

Video recipes production and SMM campaigning
with GoodWine stores. Ukraine

Alaska salmon at major restaurant events:
Bocuse D’Or, 50Best, Fontegro. Ukraine

Culinary masterclasses
at the Blogger Camp. Romania

Salmon buyers to participate in the Cochran Mission to Alaska
Georgia
Season EEU 2021/22. Pollock

- Recipes for families with kids.
  Produced with influencers and featured at influencer social media pages. Ukraine.

- Pollock recipes included in the official recipe brochure for schools.
  Ukraine.

- Surimi promotions - negotiations
  with Vici. Lithuania.
Season EEU 2021/22. Pollock roe

**POLLOCK ROE CONSUMER RESEARCH. UKRAINE**

**Research conclusions:**
- Product is known, yet the consumption culture is at early stages.
- Current consumption patterns:  
  - morning sandwich with roe and butter  
  - every day snack with bread
- Healthy benefits are recognised (Omega3, good for immunity), but not well known.
- Consumers are interested to know more on health benefits and get recipes/ideas on more diverse consumption.

**Pollock roe recipes development and SMM campaign.**

Recipes used by importers in their social media. Ukraine.
After February 24, 2022
Regional economic overview after February 24, 2022

- Escalating geopolitical tensions loom over EEU growth prospects.
- Two-digit inflation rate in the region.

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>POPULATION MIN (2021)</th>
<th>GDP GROWTH 2021</th>
<th>GDP GROWTH 2022 (FORECAST)</th>
<th>INFLATION 2021</th>
<th>INFLATION 2022 (FORECAST)</th>
<th>IMPORTS FROM ALASKA 2021,MT</th>
</tr>
</thead>
<tbody>
<tr>
<td>UKRAINE</td>
<td>43.8</td>
<td>3.4%</td>
<td>-30-35%</td>
<td>9.56%</td>
<td>26%+</td>
<td>10 900</td>
</tr>
<tr>
<td>LITHUANIA</td>
<td>2.8</td>
<td>5%</td>
<td>19%</td>
<td>4.6%</td>
<td>17.0%</td>
<td>8 500</td>
</tr>
<tr>
<td>GEORGIA</td>
<td>3.7</td>
<td>10.4%</td>
<td>8.8%</td>
<td>9.6%</td>
<td>11.0%</td>
<td>550</td>
</tr>
<tr>
<td>ROMANIA</td>
<td>191</td>
<td>5.9%</td>
<td>3.9%</td>
<td>4.1%</td>
<td>11.1%</td>
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<tr>
<td>MOLDOVA</td>
<td>2.6</td>
<td>13.9%</td>
<td>-0.7%</td>
<td>5.1%</td>
<td>27.3%</td>
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<tr>
<td>LATVIA</td>
<td>19</td>
<td>4.5%</td>
<td>3.9%</td>
<td>3.2%</td>
<td>15.8%</td>
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</tr>
<tr>
<td>ESTONIA</td>
<td>1.3</td>
<td>8.3%</td>
<td>1.6%</td>
<td>4.5%</td>
<td>17.0%</td>
<td>250</td>
</tr>
</tbody>
</table>

- Exchange rates national currencies vs USD is unfavorable for exports from Alaska.

*World Bank, European Commission, NMFS export data
Ukrainian economic overview 2021/22

1. Civilian losses
2. Ukraine’s GDP is forecast to contract -34.5% in 2022. In 2023, a 8.2% rebound is expected.
3. Ukraine’s reconstruction costs est. at $349 billion, 1.5 times more the size of its GDP in 2021.
4. Over 14 mln Ukrainians (32% of the Ukrainian population) displaced internally or outside the country.
5. 50% of Ukrainian businesses to shut down.
6. Electrical infrastructure destroyed by 40% (as of November 2022)
Alaska seafood imports Jan-Aug 2020/2021/2022

- H&G Pacific Salmon (030311, 030312) imports to EEU, MT
- Alaska pollock imports to Ukraine, MT
- Salmon roe imports to Ukraine and Lithuania, MT
- Alaska pollock surimi to Lithuania, MT
## Seafood retail prices comparison 2021/2022, USD/kg

<table>
<thead>
<tr>
<th></th>
<th>MAR 2021</th>
<th>MAY 2022</th>
<th>CHANGE, %</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>UKRAINE</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pollock H&amp;G (AK)</td>
<td>3.75</td>
<td>4.59</td>
<td>22%</td>
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<tr>
<td>Pollock Fillet (AK)</td>
<td>4.93</td>
<td>9.03</td>
<td>83%</td>
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<tr>
<td>Hake H&amp;G (USA)</td>
<td>4.12</td>
<td>4.65</td>
<td>13%</td>
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<tr>
<td>Hake Fillet (USA)</td>
<td>5.28</td>
<td>7.55</td>
<td>43%</td>
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<tr>
<td>Fresh Atlantic Salmon (Norway)</td>
<td>10.41</td>
<td>25.47</td>
<td>135%</td>
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<tr>
<td>Cod Roe (Norway)</td>
<td>12.87</td>
<td>16.36</td>
<td>27%</td>
</tr>
<tr>
<td>Pollock Roe (AK)</td>
<td>13.44</td>
<td>16.87</td>
<td>26%</td>
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<tr>
<td>Salmon Roe (AK)</td>
<td>74.63</td>
<td>8793</td>
<td>18%</td>
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<tr>
<td><strong>AVERAGE</strong></td>
<td></td>
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<tr>
<td><strong>ROMANIA</strong></td>
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<td></td>
<td></td>
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<tr>
<td>Keta Steaks (AK)</td>
<td>14.23</td>
<td>13.84</td>
<td>15%</td>
</tr>
<tr>
<td>Sockeye Salmon Fillet (AK)</td>
<td>21.79</td>
<td>29.32</td>
<td>35%</td>
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<tr>
<td>Smoked Sockeye (AK)</td>
<td>82.84</td>
<td>72.26</td>
<td>-13%</td>
</tr>
<tr>
<td>Salmon Roe (AK)</td>
<td>101.21</td>
<td>111.39</td>
<td>10%</td>
</tr>
<tr>
<td>Fresh Atlantic Salmon (Norway)</td>
<td>14.53</td>
<td>20.68</td>
<td>42%</td>
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<tr>
<td><strong>LITHUANIA</strong></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Salmon Roe (AK)</td>
<td>142.77</td>
<td>131.12</td>
<td>-8%</td>
</tr>
<tr>
<td>Snow Crab Surimi Sticks (AK)</td>
<td>8.03</td>
<td>9.24</td>
<td>15%</td>
</tr>
<tr>
<td><strong>AVERAGE</strong></td>
<td></td>
<td></td>
<td>14%</td>
</tr>
</tbody>
</table>
WE STAND WITH UKRAINE
Impact of the war on Ukrainian fish industry
Season EEU 2022/23

1. Digital materials reuse:
   - update of easyfish.club and eeu.alaskaseafood.org web-sites
   - translation of ASMI materials and sites into Ukrainian
   - repurposing into new formats (reels, shorts).

2. Pollock roe promotion:
   - position Alaska pollock roe as economy source of Omega-3 and healthy snack
   - coordinate on-line media communications campaign
   - partner with 3 influencer chefs in recipes development and promotion
   - share materials, copywrite with importers (Gélios, Klion, other)

3. Pollock surimi promotion with Vici.
   - Surimi – product >50% Alaska

4. Salmon roe promotion:
   - Support salmon roe sales outside of Ukraine
Thank you!

Questions?