

October 17, 2013

TO: ASMI Board of Director's & Committee Members

FROM: Claudia Hogue, Foodservice Director

RE: Foodservice Program Update

This report is a recap of the foodservice program activities for FY13 (July 1, 2012 - June 30, 2013). In addition to the foodservice program, staff is also responsible for co-managing the consumer public relations and advertising programs which are covered in separate reports provided by Schiedermayer & Associates.

FOODSERVICE PROGRAM OBJECTIVES:

- Generate increased foodservice awareness and usage via Alaska seafood brand-oriented marketing programs.
- Achieve differentiation between wild Alaska, farmed seafood (including specialty farms) and other seafood sources, and other proteins.
- Maintain the highest-value perception in targeted foodservice segments.

FOODSERVICE STRATEGIES:

- Build awareness among foodservice operators and their patrons for Alaska seafood's unique features: Alaska, Wild, Sustainable, Pure, and Flavor/Texture.
- Position Alaska seafood as a healthy alternative to other proteins.
- Expand usage and menu branding of wild Alaska seafood (including value-added products) with target operator and distributor accounts
- Build on established leadership position for ASMI in the areas of seafood education, training and menu development.
- Develop partnership position for ASMI in providing consumer-oriented marketing programs.
- Maximize Alaska seafood's position and penetration with high-volume broadline and seafood specialty distributors.
- Heighten Alaska seafood industry awareness and involvement in the foodservice program and continue to educate so that the industry can meet the needs of the marketplace.

OPERATOR PROMOTIONS:

National account promotions have been very effective in expanding the usage and menu branding of Alaska seafood with target operator accounts. Working with key decision makers

within these accounts, ASMI develops customized promotional programs that may include the following components: merchandising materials, menu branding allowances, advertising, research, waitstaff incentives, training seminars, etc.

In addition, ASMI also has a number of themed, species-specific promotional materials that are available to all foodservice operators year-round. These include posters, table tents, menu sheets, waitstaff tip cards, buttons, etc. ASMI also has materials designed especially for kids.

During FY13, ASMI's foodservice program secured a number of promotions with high-volume as well as high-profile national account chains that include all species of Alaska seafood. There continues to be a strong interest in promoting seafood from Alaska and most of these promotions are backed with significant financial support from the chains themselves. Particular emphasis has been placed on targeting foodservice segments that offer growth opportunities:

- Quick service restaurants
- Fast casual restaurants
- Regional growth chains
- Colleges & universities
- Foodservice management companies (i.e. Sodexo, etc.)

The following national operator accounts partnered with ASMI to promote Alaska seafood in FY13. In total, these accounts represent over 11,187 units across the U.S. promoting the Alaska brand and logo with customized point-of-sale materials, menus and consumer advertising.

Bud's Chicken & Seafood (Alaska cod)

Captain D's (Alaska salmon)

Club Corporation (Alaska halibut, spot prawns, salmon, snow crab, rockfish)

Davidson College (All-species)

Dine Around Seattle (All-species)

Fish City Grill (Alaska salmon)

Fresh Fish Company (All-species)

Hard Rock Café (Alaska cod)

Jack in the Box (Alaska pollock)

Jason's Deli (Alaska sockeye salmon)

Macy's Department Stores (Alaska cod, rockfish, sole, sockeye salmon)

Market Broiler Restaurants (Alaska Cod, snow crab & halibut)

McCormick & Schmick's (Alaska salmon & halibut)

Morton's Steakhouse (Alaska halibut & king crab)

N.Y. Yankees – Legends Hospitality (Alaska salmon, halibut, crab,

scallops, cod & rockfish)

Oceanaire Seafood Room (Alaska halibut & king crab)

Rockfish Seafood Grill (Alaska salmon)

Rubio's (Alaska Pollock)

Salad Creations (Alaska salmon)

Saltwater Restaurants (Alaska snow & king crab)

Showmars (Alaska sole & pollock)

Skidmore College (Alaska halibut & king crab)

Sodexo (Alaska pollock)

Sonic Drive-In (Alaska pollock & surimi seafood)

Stillwater Grill (Alaska salmon, scallops, sole, king crab)

University of Massachusetts (All-species)

University of Montana (All-species)

University of New Hampshire (All-species)

University of Richmond (Alaska salmon & cod)

White Castle (Alaska pollock)

Wienerschnitzel (Alaska pollock)

Yale University (Alaska salmon)

DISTRIBUTOR PROMOTIONS:

Distributors are a critical link in the foodservice sales path because they sell to chain accounts, foodservice management companies and independent operators on a daily basis. The distributor exerts a high degree of influence over operators in their purchasing decisions. While independent and seafood specialty distributors play a vital role in supplying fresh products to certain segments of the industry, broadline distributors are an important force, especially in terms of frozen seafood products and their penetration of all foodservice segments. In addition, boardline distributors are also putting increased focus on fresh seafood sales.

Historically, ASMI broadline distributor promotions have been heavily involved with individual operating companies and divisions. Within the past year, the landscape has shifted towards a corporate controlled environment also known as Category Management. Category Management now controls the entire process from purchasing, brand development, quality control and marketing (training and promotional activities at the division level). ASMI has a unique opportunity to partner with top boardline distributors at the corporate level to facilitate the growth of the Alaska seafood brand and build sales.

The following distributors partnered with ASMI during FY13 on all-species sales incentive and brand awareness promotions:

Cash-Wa Distributing

Del Monte Meat Co.

FSA-Corporate

FSA-Western WA

Gordon Foodservice

Nicholas & Co.

Reinhart-Corporate

Sysco/Arizona

Sysco/Chicago

Sysco/Cleveland

Sysco/Louisville

Sysco/Philadelphia

Sysco/Portland

US Foods/Atlanta

Samuels & Son Seafood Co./Philadelphia

Over 2 million pounds of Alaska seafood was sold during FY13 ASMI distributor promotions. Approximately, 40% of the total amount sold represents new business for the distributor because of the way ASMI promotions are structured.

TRADE SHOWS & CONFERENCES:

National Association of College & University Foodservice (NACUFS): ASMI participated as a platinum sponsor at the NACUFS conference in Boston from July 11- 14. Over 1,500 food and beverage decision makers attend this conference from colleges and universities around the country. ASMI had a booth during the trade show and also featured Alaska seafood during meals. ASMI staff also spoke on the seafood sustainability panel during the general session which included information on the RFM certification.

The foodservice program continues to collaborate with schools around the country to menu and promote Alaska seafood. Seafood sustainability is a top priority for most schools and provides a great opportunity for ASMI to educate the next generation of seafood consumers.

NACUFS Pacific/Continental Regional Conference: The foodservice program presented a workshop titled *Affordable, Sustainable Seafood for Generations* at the 2013 NACUFS Pacific/Continental Regional Conference in March. Foodservice staff along with Dan Enos, ASMI Chef Congress member and Executive Chef at the Oceanaire Seafood Room in Boston, presented an hour-long seminar. Topics included seafood sourcing, handling, sustainability

and menu ideas. Chef Enos presented two campus tested recipes featuring Alaska salmon, and Alaska cod.

Chef's Collaborative National Summit: Chefs Collaborative is a national organization that works with chefs and the greater food community to celebrate "local" and foster a more sustainable food supply. In October, ASMI participated as the premier sponsor at the annual *Chef's Collaborative Sustainable Food Summit* held in Seattle. The Summit draws chefs, writers and food industry professionals from around the country to learn and speak on sustainable food issues. As the premier sponsor, ASMI presented an hour-long session on the diversity of Alaska salmon. Chef Congress member Chris Keff of Flying Fish and Denby Lloyd of Alaska Resource Consultancy guided the packed room through the five species of salmon, lifecycle, sustainability and culinary applications for each species. A tasting of all five species also took place.

ASMI along with the Bristol Bay Regional Seafood Development Association hosted the Monday night reception where several species of Alaska seafood including black cod, ling cod, sockeye salmon, weathervane scallops and snow crab were presented by some of the best chefs in the Seattle area.

Les Dames d'Escoffier National Conference (LDEI): ASMI sponsored and attended LDEI national conference in St. Louis in October. LDEI is the premier organization of influential professional women who are committed to the advancement of education and philanthropy in food, beverage and hospitality. At the conference staff networked and sampled various Alaska seafood species including Alaska black cod, spot prawns and snow crab. With 26 chapters around the country LDEI represents the most influential women in the food industry.

Les Dames d'Escoffier Seattle Chapter – *Fish Tales & Ales*: ASMI and the Seattle Chapter of Les Dames d'Escoffier hosted an evening of *Fish Tales & Ales* at the Pike Pub and Brewery in Seattle. The event was an educational session for food industry professionals and culinary students on the benefits of frozen Alaska seafood. Frozen Alaska salmon, cod, and king crab were featured and industry members Mark Tupper, John Martin and Konrad Uri instructed the audience on the various characteristics of the species, harvest methods, processing and sustainability. Chef Gary Marx of the Pike Pub, Thoa Nguyen of Thoa's and Lisa Dupar of Pomegranate Bistro provided the delicious Alaska seafood samples.

With active chapters throughout the world, LDEI is dedicated to supporting and promoting the achievement of women in the culinary professions and to fostering excellence through education and charitable activities.

National Restaurant Association/Marketing Executives Group (MEG): ASMI was a sponsor of both the fall and spring MEG meetings which target marketing directors from the top national

and regional chains in the U.S. MEG has become a regular event for ASMI and a number of promotions have resulted from association with this group over the years.

International Corporate Chefs Association (ICCA): The ICCA is the only chefs association designed exclusively for corporate chefs from the nation's largest chains and multi-unit operations. As one of the founding sponsors, ASMI has the opportunity to network, educate and develop relationships with key corporate executive chefs throughout the year at a number of ICCA events.

Culinary Institute of America (CIA)/Worlds of Healthy Flavors Conference: With continued emphasis on health, ASMI sponsored the World of Healthy Flavors Conference in January which brings together leading experts from Harvard University in nutrition research. The goal of this retreat is to assist corporate chefs and senior managers from top national accounts in expanding options for healthy meal choices. As a key sponsor, ASMI is in a unique position to help educate chefs on how they can incorporate Alaska seafood onto the menus of America's top chains.

Menu Directions Conference: The foodservice program was a platinum sponsor at the 2013 Menu Directions Conference hosted by *Foodservice Director Magazine* in Tampa from March 3-5, 2013. The conference brings together leaders from Colleges & Universities, Healthcare, and Business & Industry segments. During the conference, ASMI Chef Congress Member Barton Seaver presented two sessions on sustainable seafood and sampled Alaska Pollock in Romesco sauce for the attendees. ASMI also participated in the trade show portion of the event and sampled Alaska smoked salmon and snow crab.

International Boston Seafood Show: ASMI participated again this year in the Boston Seafood Show. ASMI continued with a "green" booth showcasing the artwork of Rie Muñoz, one of Alaska's most recognized artists. This year the RFM certification program continued to play a primary focus. This is a shared project with the retail, technical and international programs.

College & University Special Events: ASMI continues to partner with individual schools to promote sustainable Alaska seafood. Special events are a great way to create "teachable moments" for students and staff and create excitement on campus. Over the past few months a number of promotions have taken place on campuses around the country.

Alaska Seafood Celebration at the University of New Hampshire: ASMI and the University of New Hampshire partnered for an *Alaska Seafood Celebration* on campus. Students were treated to a variety of Alaska seafood items including Alaska pollock, king crab, salmon and

surimi seafood. Alaska seafood recipes and sustainability information were distributed and the University created a variety of games and contests with ASMI hats and t-shirts as prizes. For many students, college is their first opportunity to develop life-long eating habits and these types of events are a great way to create new Alaska seafood consumers.

UMass Amherst – World’s Largest Seafood Stew: Over Labor Day, UMass Amherst shattered a new Guinness World Record, this time by cooking a 6,656 pound seafood stew. The stew featured over 1000 pounds of seafood including mussels, lobster, clams, haddock and Alaska salmon. This is the third Guinness World Record UMass has broken - including the *Longest Sushi Roll* which featured Alaska surimi seafood, and the *World’s Largest Stir Fry* which also included Alaska seafood. Of course once the record was set, all were invited to sample the delicious stew.

UMass utilizes these events to talk with students about sustainability, promote healthy eating and build community among students and faculty as the academic year kicks off. UMass is currently No. 3 nation-wide for “best campus food” in the 2013 edition of the Princeton Review’s Best 377 College and takes much pride in serving only sustainable food to their students.

In October, **UMass Amherst** also celebrated its annual ***Alaska Seafood Week***. Chef Dan Enos from the Oceanaire Seafood Room in Boston fed over 4,000 students. Alaska halibut, cod, rockfish and king crab was served in addition to a side-by-side tasting of the five Alaska salmon species. After dinner, Chef Enos conducted a halibut culinary demonstration and foodservice staff presented a nutrition and sustainability overview to student and faculty members of the school.

University of Richmond: The foodservice program partnered with the University of Richmond to promote sustainable seafood on campus. Students enjoyed a fish taco bar that featured wild Alaska sockeye salmon and ASMI temporary tattoos. The event was rated online and a twitter feed displayed what the students thought of their dining experience: “love the fish” and “the fish tacos are great but the temporary tattoos are fantastic - you should have them everyday” are just a couple of the tweets seen. The students rated the event a 9.38 out of 10.

Monterey Bay Aquarium – *Cooking for Solutions*: The foodservice program was a Gold level sponsor of this year’s Monterey Bay Aquarium *Cooking for Solutions*. This annual event brings together chefs, suppliers, fisherman and leaders in the sustainable seafood movement to network and educate consumers on sustainability. This year, ASMI sampled Alaska cod and halibut at the “Meet the Chefs” reception on Thursday night. At Friday night’s *Cooking for Solutions Gala*, Alaska Seafood Chef Congress members Susan Feniger and Mary Sue Milken

served Alaska king crab tacos and talked about Alaska seafood as the preferred choice for sustainable seafood.

Culinary Institute of America (CIA) – *Menus of Change*: The *Menus of Change* leadership initiative is a partnership of the CIA and Harvard School of Public Health that is working to create a long-term, practical vision for the integration of nutrition, environmental stewardship, the culinary arts and innovation within the business of American foodservice. ASMI is one of the founding sponsors and also has a seat on the Sustainable Business Leadership Council.

In June, the first annual summit took place in Boston and was attended by 250 foodservice executives including company CEO's, executive chefs, VP's of corporate & social responsibility, scientific leaders and the media. In addition to showcasing Alaska seafood throughout the conference, Randy Rice also spoke on the seafood sustainability panel.

Aspen Food & Wine Classic: June 14-16th saw 6,000 food enthusiasts, master chefs, national account executives, food editors, bloggers, and ASMI gather at 8,000 feet for the Aspen Food & Wine Classic. The premier culinary event, now in its thirty-first year, boasted three days of cooking demonstrations, wine tastings, and panel discussions. Alaska seafood stood out on the uniqueness and taste of its three showcase recipes: Alaska King Crab and Sole Ceviche, Alaska Snow Crab Legs with Rouille Dipping Sauce, and Alaska Smoked Salmon Summer Pasta Salad. The combination of wild seafood and inspired preparation duly excited – and sated – some of the world's most discerning epicureans. This was a joint effort with the retail program and was an add-on benefit to our advertising buy with *Food & Wine Magazine*.

TRADE EDUCATION:

Foodservice Research: The foodservice program relies heavily on consumer research to help develop overall program strategies and to educate operators and distributors about consumer attitudes and preferences toward seafood in general. ASMI recently completed new research to investigate what new trends and changes have emerged with consumers over the past two years. The research also looked at issues such as sustainability and overall consumer satisfaction with seafood offerings at QSR and casual restaurants. A new brochure highlighting this research is being developed as a sales tool to help demonstrate consumer preference for Alaska seafood.

New Cod POS Materials: The foodservice program developed new point-of-sale (POS) materials to help operators and distributors promote Alaska cod. These new materials have a vintage-inspired appeal and include a variety of items to choose from: table tents, menu sheets, posters and counter cards. The new theme *A Timeless Tradition of Flavor* pays homage to Alaska's fishing heritage and the amazing taste of Alaska cod.

CIA/Pro Chef: The Culinary Institute of America (CIA) offers a media educational venue through their on-line site, *ProChef.com* and ASMI has partnered with them to create an ASMI micro-site. This custom program includes streaming videos, interactive web pages, photography and informative text highlighting Alaska seafood. Recently, a social media component has also been added to increase traffic to the site and encourage dialogue about Alaska seafood. The goal is to better educate the foodservice community about Alaska seafood and its use in today's menu applications suitable for a range of foodservice operations and segments. The Culinary Institute of America is the largest and most prestigious culinary school in the U.S.

Since the re-launch of ASMI's new micro-site on January 9th, which included content updates and enhanced content distribution, the ROI has increased dramatically - 153% increase in unique visits to CIAprochef.com/alaskaseafood.

American Culinary Federation (ACF) World Cup Competition: An ACF team of American chefs competed in the 23rd annual Culinary World Cup 2012 in Erfurt, Germany October 5-10. The USA team featured Alaska black cod and king crab in their dish and won a silver medal in cold-food presentation and a silver medal in hot-food kitchen, placing sixth overall. More than 1,500 chefs representing 54 countries participated in the team and individual competitions.

ASMI Foodservice Materials Reprints: This year, ASMI foodservice has seen record demand for its merchandising and educational materials. The good news – these material are being utilized by both the foodservice trade and the Alaska seafood industry. As a result, this category has become a larger part of the overall budget.

ADVERTISING:

Thanks to additional program dollars this year, the foodservice program was able to continue trade advertising that positions Alaska seafood as a sustainable resource and promotes the FAO-Based Responsible Fisheries Management certification. In FY 13, ASMI ran ads in the following print and online foodservice trade publications:

- ***Nation's Restaurant News - online***
- ***Food Arts***
- ***Restaurant Business Magazine***
- ***Foodservice Director – print and online***
- ***On-Campus Hospitality***
- ***Flavor & The Menu***
- ***Plate Magazine***

- *Santé Magazine*

Total Media Impressions for FY13 were 1,371,926. ASMI also participated in a *Signet AdEffect* study which provides reader feedback on the effectiveness of ads that appeared in a particular issue. **ASMI's foodservice ad received a top score of 90 which is considered highly effective.**

FOODSERVICE PUBLIC RELATIONS:

Foodservice public relations is targeted to the foodservice trade which includes chefs, distributors, marketing and purchasing executives, culinary schools and anyone associated with the foodservice business. These activities include editorials, product releases and news articles in foodservice publications, as well as special events that promote Alaska seafood to operators and influential food editors. Since July 2012, ASMI foodservice has generated Alaska seafood articles and placements in the following print and online trade publications. **Total Media Value for FY13 is \$437,367 and the total audience reached was 2,190,700.**

7/15/12	<i>Flavor & the Menu</i>	Lessons from the Source
7/20/12	<i>Restaurant Hospitality</i>	Grilled Alaska Halibut Tacos
9/21/12	<i>Santé</i>	Wild Caught
10/12/12	<i>On-Campus Hospitality</i>	Alaska Seafood Marketing Institute
10/12/12	<i>Monkeydish.com</i>	Commodity Update
10/15/12	<i>Flavor & the Menu</i>	Partners in Promotion
10/24/12	<i>Recipedia</i>	Thai Cod Salad
10/24/12	<i>Recipedia</i>	Sesame Cod Rolls
11/15/12	<i>Restaurant Hospitality</i>	Wild Alaska Rockfish Skewers
1/4/13	<i>Santé</i>	It's All Good in Alaska!
1/18/13	<i>Santé</i>	Alaska Pollock Season Opens
2/5/13	<i>Foodservice Director</i>	North! To Alaska
2/20/13	<i>Food Management</i>	Thai Seared Alaska Cod Salad
2/21/13	<i>Foodservice Director</i>	In Defense of Surimi
2/21/13	<i>Nation's Restaurant News</i>	Alaska's Most Prolific Fishery
3/1/13	<i>Food Management</i>	Pollock Po' Boy
3/1/13	<i>Restaurant Hospitality</i>	Sesame Seared Sole Roll
3/1/13	<i>Chef Magazine</i>	Industry Voices: Sustainable Seafood
4/1/13	<i>On-Campus Hospitality</i>	Chili Garlic Alaskan Pollock Fillet
4/1/13	<i>Santé</i>	Alaska Seafood: 3 More Responsible Fisheries
4/1/13	<i>QSR</i>	The Story of the Sea
4/8/13	<i>QSR</i>	The Story of Alaska Seafood video
4/10/13	<i>Flavor & The Menu</i>	Alaska Cod – Cover Shot and article
4/22/13	<i>Restaurant Hospitality</i>	Black Cod with Sugarcane Marinade
4/25/13	<i>QSR</i>	Alaska Seafood Goes Vintage with Marketing Materials
5/1/13	<i>Food Arts</i>	Sustainability Yours
5/15/13	<i>Recipedia</i>	Halibut Corn Dogs
6/20/13	<i>Flavor & The Menu</i>	Rising Tide

International Foodservice Editors Conference (IFEC): In November, ASMI participated in the annual IFEC conference in Nashville. IFEC provides a face-to-face forum for ASMI to pitch story ideas to foodservice editors and communication professionals. Over 200 individuals are involved in this organization and offer ASMI a great opportunity to network and educate participants about Alaska seafood.

ASMI also partnered with Chef Will Uhlhorn of Table 3 in Nashville to feature Alaska scallops and halibut at the opening evening's *Chef Showcase* event. The chef prepared two dishes: "olive oil-poached wild Alaska scallops with Jonah gold apple reduction" as well as "country ham and mint pan-seared wild Alaska halibut with charred Meyer lemon, lemon pistou and crispy halibut brandied cakes." The chef did an excellent job of talking to attendees about the value of wild, sustainable Alaska Seafood.

Dutch Harbor Media Tour: In February, ASMI foodservice hosted editors from the top foodservice publications in the U.S. for a media tour of Seattle, Dutch Harbor and Akutan. The primary focus was to provide in-depth education on Alaska pollock, crab and cod. Pat Shanahan with GAPP was an integral part of the week-long event and planning process. Five editors attended representing the following publications:

- Bret Thorn - *Nation's Restaurant News*
- Paul King – *Foodservice Director*
- Sam Oches – *QSR Magazine*
- Cecily Walters – *School Nutrition*
- James Jondreau – *Food Arts Magazine*

The week began on Monday with a special tour for Cecily Walters with *School Nutrition*. Cecily was particularly interested in visiting Seattle Public Schools to see how Alaska pollock is offered on school lunch menus. The remaining editors arrived on Tuesday and the group began in Seattle with a tour of Unisea's surimi plant and dinner with members of the GAPP board at Flying Fish. It was then on to Dutch with a tour at Unisea and presentations from NOAA Fisheries Managers and ADF&G. Sustainability was a key part of our educational efforts.

On Thursday, the group visited Akutan where the editors were able to see cod, pollock and crab being processed. After returning to Anchorage, the final dinner was held at the Marx Bros Café where Chef Naomi Everett and Chef Patrick Hoogerhyde from ASMI's Chef Alliance joined the group to talk about all the wonderful culinary applications that Alaska seafood has to offer.

The event went very well and the weather cooperated. The editors enjoyed the tour and felt it was educational and worthwhile. There have already been a number of positive articles written and PR relationships strengthened as a result of this media event.

International Association of Culinary Professionals (IACP): ASMI played a prominent role in the 35th annual International Association of Culinary Professionals (IACP) conference in San Francisco, which was attended by nearly 3000 culinary professionals from around the world. ASMI partnered with Kikkoman during the culinary expo and served samples of Alaska snow crab with Kikkoman-developed dipping sauces. ASMI also sponsored the IACP awards ceremony and provided halibut and cod for the celebration that followed. The IACP conference provides excellent opportunities to connect with culinary professionals, learn about the latest food trends, and share the story of Alaska seafood.

Please let me know if you have any questions. Thanks!