FY14 ASMI Foodservice Recap

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Alaska Seafood Marketing Institute
September 30, 2014
Agenda

- Program Goals & Objectives
- Operator Promotions
- Colleges & Universities
- Distributor Promotions
- Conferences & Events
- Trade Education & Advertising
- Fish Sandwich Research
Program Goals & Objectives

• ASMI Foodservice team’s overall objective:
  • Build relationships with away from home (foodservice) decision makers that impact demand and build visibility for sustainable Alaska Seafood.

• Our efforts are focused on the foodservice segments where we can be most effectual:
  • Restaurant Chains
    • Quick Service, Casual, Fast-Casual
  • College & University
  • K-12
  • Distributors (Broadline & Specialty)
Building Partnerships in Foodservice

- Our materials are only the starting point.

- We understand operator’s and distributor’s needs and focus on building relationships that build demand for Alaska seafood.

- Individualized marketing support and promotional dollars are available

- ASMI focuses on the Marketing personnel and Chef/R&D, not Purchasing to create visibility for Alaska seafood.
Restaurant Chain Decision Making
Turning Opportunities Into Promotions

- Menu R & D:
  - Health & wellness
  - Consumer food and lifestyle trends
    - Fish tacos, upscale fish sandwiches, snacking 24/7
  - LTO’s and new product testing
  - Sustainability messaging
  - Seasonal opportunities including Lent and holidays
  - Family fishing and supporting local communities.
## FY14 Operator Promotions

### QSR & Fast Casual Chains
- Arby’s
- Captain D’s
- Jack in the Box
- Long John Silvers
- Salad Creations
- Saladworks
- Sonic Drive In
- Wienerschnitzel
- White Castle
- KFC – Hawaii
- Joey’s

### Other
- Bud’s Chicken & Seafood
- Denny’s
- Fish City Grill
- Jason’s Deli
- Macy’s
- Market Broiler Restaurants
- McCormick & Schmick’s
- Morton’s Steakhouse
- Oceanaire
- RAM Group
- Saltwater Restaurants
- Shari’s
- Showmars
- Smokey Bones
- Joey’s Seafood Canada
- New York Yankees
Arby’s FSI

2 FOR $4 REEL BIG FILLET

It’s A Reel Big Deal! Get 2 of our enormous Reel Big Fillet sandwiches for just $4. You won’t find a bigger fish sandwich in the sea. It’s a huge, flaky, Alaska Pollack fillet lightly breaded and cooked to golden perfection. Then topped with crisp lettuce and tangy tartar sauce. Don’t let this big one get away. It’s only available for a limited time.

Limited time offer at participating locations. Copyright © 2013 Arby’s Restaurant Group, Inc. All rights reserved. Tel 616-234-5100, Inc. All rights reserved.

OVER $XX WORTH OF COUPONS

Find us at /arby's
Denny’s

NEW! Alaska Salmon
A grilled wild-caught Alaska salmon fillet seasoned with a delicious blend of garlic and herbs. Served with your choice of two sides and dinner bread. 8.99

NEW! Fit Fare® Alaska Salmon
A seasoned wild-caught Alaska salmon fillet grilled to perfection. Served with whole grain rice and steamed broccoli. 8.99

Tilapia Ranchero
A seasoned white fish fillet grilled and topped with freshly made pico de gallo and fresh avocado. Served with a side of our smoked Cheddar mashed potatoes and dinner bread. 8.99

Fish & Chips
Two wild-caught haddock fillets fried golden-brown and served with wavy-cut French fries. Served with tartar sauce and your choice of one side and dinner bread. 8.99

CAUTION: Skillets are hot. Handle with care.
Jack in the Box - Alaska Fish Poppers

ALASKAN FISH POPPERS

10 PC
$2.39
PLUS TAX

LIMITED TIME ONLY
Made with Alaskan Fish Poppers

FISH PITA COMBO
$4.99
PLUS TAX

LIMITED TIME ONLY
Made with Alaskan Fish Poppers

Wild, Natural & Sustainable®
Jason’s Deli

Eat well

Add grilled, wild SALMON to your Salad Bar.
4 oz. fillet of wild Alaskan sockeye salmon

So many healthy foods in one salad...

NEW! Mighty Wild Salmon Salad
A nutrition-rich, potent mix of organic field greens, beets, beans, nuts and more, topped with grilled wild Alaska sockeye salmon. Served with dressing.
Long John Silver’s
New Dippin’ Fish Sticks

Enjoy the best the ocean has to offer, wherever and whenever in a dippable, dunkable new way! Our wild-caught, flakey Alaska Pollock is prepared in our Classic Batter and served with your choice of sauce.

NOW YOU’RE SNACKING!

Website
STOP FISHING AROUND FOR YOUR FRIDAY FEAST.

Throw back the shrimpy fish sandwiches, because Smokey Bones’ new and improved Fish & Chips will whip your taste buds into a golden fried frenzy. Our delicious Samuel Adams Boston Lager beer battered Alaskan Cod is this season’s tastiest catch. And with tartar sauce, a side of fresh coleslaw, and a crispy heap of natural cut fries, you can stop searching for seafood—and start feasting on it.
FISH COMBO

$6.99

PLUS TAX

2 Alaska Pollock Fish Filets
1 Individual Potato Wedges
1 Medium Drink
New York Yankees
New York Yankees

- Specialty -

Pan Seared Alaska Salmon with Sautéed Fennel & Pearl Onions
Joey’s Facebook Page

WILD ALASKA WEEKENDS
Prepared with Wild Alaska Pollock and served with Fries and Coleslaw.
Offer available at participating locations. Not valid in combination with other offers. Dine in only. No coupon required.
Fridays, Saturdays and Sundays from February 7 - March 2
Joey’s – Newspaper Banner

WILD ALASKA WEEKENDS 2 for 1 Famous Fish & Chips

Prepared with Wild Alaska Pollock and served with Fries and Coleslaw.

Fridays, Saturdays and Sundays from February 7 - March 2

123.456.7890 123 Fish Street
Franchise Opportunities
1-800-661-2123 joey's.ca
Rubio's

Sustainable Seafood

A Majority of our Seafood is Certified Sustainable

Our Genuine Wild Alaska Pollock is certified as responsibly managed in accordance with the FAC-based Responsible Fisheries Management (RFM) Certification. The certification shows that Alaska's fisheries meet the criteria of the United Nations Food and Agriculture Organization (FAO) Code of Conduct for Responsible Fisheries. These third-party certifications are awarded to fisheries or farms that meet sustainable seafood standards for maintaining healthy populations and ecosystems, and for seafood traceability. See below for more details on the BAP and RFM.

Our Progress to Date

Certified Wild Caught Seafood

- 100% of our Genuine Wild Alaska Pollock is certified as responsibly managed in accordance with the FAC-based Responsible Fisheries Management (RFM) Certification.
- Our Pollock can be found in our Original Fish Tacos, Fish Taco Especial, Avocado Corn Fish Tacos, and Shrimp-Battered Fish Burrito.

Certified Farm Raised Seafood

- 100% of our Atlantic Salmon is sourced from farms that are certified as sustainable in accordance with Best Aquaculture Practices. Our Salmon can be found in our Atlantic Salmon Taco and Atlantic Salmon Burrito.
- 100% of our Shrimp is sourced from farms that are certified as sustainable in accordance with Best Aquaculture Practices. Our shrimp can be found in our United Gourmet Tacos™ with Shrimp, Deluxe Veracruz Shrimp Tacos, and our Grilled Shrimp Burrito.
Rubio’s

Look for this icon on our menu to find items that feature sustainable seafood.

Talk to me about the word “sustainable.”
Sustainable seafood is fished or farmed using practices that maintain seafood populations without harming the environment.

How does Rubio’s fit in?
We strive to source sustainable seafood whenever we can. And the good news is, nearly every seafood item on our menu is certified sustainable or from responsibly managed fisheries. That includes every bite of shrimp, wild Alaskan Pollock, Regal Springs® Tilapia, and Atlantic Salmon.

With certain fish - like Mahi Mahi - sustainable just isn’t possible yet. Hopefully that changes. Mostly for the sake of the Mahi Mahi, who we love.

Who certified the seafood?
The Wild Alaska Pollock found in our Original Fish Tacos® comes from Alaskan fisheries that have FAO-Based Responsible Fishery Management (RFM) Certification. This means that they meet the criteria of the United Nations Food and Agriculture Organization (FAO) Code of Conduct for Responsible Fisheries. Our farm-raised seafood comes from fisheries that are certified in accordance with Best Aquaculture Practices (BAP). These third party certifications are awarded to fisheries that meet sustainable seafood standards and for seafood traceability.

How can I help?
By choosing seafood that is fished or farmed in ways that don’t harm the environment, you help preserve ocean species and ensure a healthy ocean for future generations. So that’s good. To go the extra nautical mile, just be aware of where the fish you purchase comes from and how it was caught or raised. And choose fish that is sustainable when you can.

For additional information, please visit:
Best Aquaculture Practices: aquaculturecertification.org
Alaska Seafood: wildalaskaflavor.com/sustainability
Regal Springs: regalsprings.com/certifications

Read more about our commitment to sustainable seafood at rubios.com

Wild, Natural & Sustainable®
Rubio’s

THE ORIGINAL
FISH TACO

$1.50 TUESDAYS AFTER 2:30PM

The Original fish Taco only. At participating restaurants.
Operator Promotions Results

- Operators continue to recognize the value of the Alaska seafood brand. Chain corporate initiatives around Environmental/Social Responsibility more important.
- Continue to gain access into new accounts and segments.
- FY14 – 32 national account promotions happened in over 11,187 units across the U.S. promoting the Alaska brand and logo.
- Significant financial backing from our promotional partners.
Foodservice Operator Match Spend

Overall Restaurant Chain Value of the Dollar  1:10

For every $1 dollar ASMI puts towards a restaurant chain partnership, a chain will spend approximately $10 dollars promoting Alaska seafood and the ASMI brand logo.
Alaska Seafood on Campus

Objectives:

• Teach Gen Y to eat more fish and seafood

• Use Campus sustainability initiatives to get the message across:
  ALL ALASKA SEAFOOD IS SUSTAINABLE

• Create an on-campus event to make a fun, teachable moment

• Develop media opportunities that create visibility for the school’s foodservice department and ASMI
Stanford and UMass Sustainable Seafood Week
Yale – Final Cut and Univ. of North Dakota
**Distributor Outlook**

- Overall, sales and profits are improving.

- Shift towards category management at the corporate level.

- Increased emphasis on selling distributor house brands to ensure future success.

- Role of the distributor sales rep is changing – need for better education and providing more incentives to support distributor brand growth.
Distributor Promotions

The following distributors partnered with ASMI Foodservice on all species and brand awareness promotions:

- Cash – Wa Distributing
- Del Monte Meat Co.
- Foodservices of America Corporate
- Gordon Foodservice Corporate – U.S.
- Gordon Foodservice – Canada
- Martin Bros. Distributing
- Performance Foodservice – Springfield
- Reinhart Foodservice Corporate
- Samuel & Son Seafood Co.
- Sysco Corporate – U.S.
- Sysco Corporate – Canada
- Sysco – Central Pennsylvania
- Sysco – Philadelphia
- US Foods – Western Region (8 Divisions)
The Benefits of Alaska Seafood

Did you know...?

55% of consumers eat fish and seafood because they “like the way it tastes”.

43% of consumers reported that health is the main reason for eating more fish/seafood than two years ago.

65% of consumers said they would order more fish/seafood if they had the option of choosing their side dish.

60% of consumers would order more seafood if casual restaurants offered them a choice for fish/seafood.

68% of consumers reported that seeing an Alaska Seafood logo on a menu would increase their likelihood of ordering an Alaska fish/seafood item.

*Source: Consumer Research Results, Alaska Seafood®, 2011

Why Alaska Seafood®?

WILD: No finfish farming in Alaska. The seafood is harvested in the wild, the pristine waters of Alaska’s rugged 34,000-mile coastline.

NATURAL: Alaska Seafood is seafood at its natural best. Species mature at a natural pace, swimming freely in the icy cold waters, eating a natural diet of marine organisms.

SUSTAINABLE: Alaska’s Seafood is eco-friendly. The seafood species are part of healthy, intact eco-systems and the fisheries are managed for sustainability. This is mandated by the Constitution of the State of Alaska.

FLAVOR: The superior flavor and texture of Alaska Seafood is prized around the world. They get their flavor and flesh color from their natural diet of marine organisms.

VERSATILE: Alaska Seafood is easy to prepare. You can grill, poach, bake, sauté and even take portions right from the freezer for cooking, putting a meal on the table in minutes.

HEALTHY: Alaska Seafood is healthy and nutritious. It is high in protein and low in saturated fat. It is a natural source of the “good fats” – heart-healthy Omega-3s.

U.S. JOBS FOR A HEALTHY ECONOMY: The Alaska Seafood industry is a major economic engine! It provides work for 54,000 people and is an estimated $5.8 billion economic output to Alaska. Over half the seafood harvested by American fishing families is harvested in the waters of Alaska.

Alaska boasts an abundance of exceptional and delicious species that help to meet every price and performance need.
Spotlight on **Wild Salmon**

As consumers become more health-conscious, sell them on the benefits of choosing heart-healthy wild salmon—with a higher concentration of omega-3 fatty acids.

Serve grilled wild salmon on top of any salad to create a lighter main course that still has plenty of flavor.

Go beyond filets! Try a twist on the classic with salmon burgers or tasty salmon sliders with dill mayonnaise.
Wild Salmon is the Natural Choice

Wild salmon is a cost-effective way to bring in more business and expand menu options. These healthy, flavorful fish are easy to prepare and offer a convenient and tasty source of protein and omega-3 fatty acids.

- Whenever serving salmon, you should choose the right fit for your menu and customer price range. Sysco offers a wide variety of species and forms to meet your specific needs.
- The mention of “wild-caught” or “Alaska” salmon on a menu increases sales significantly. All Sysco wild salmon is caught in Alaska, so emphasize this point to realize greater profits.
- Sysco’s wide variety of forms lets you find the most economical choice for your establishment, including portions, skinless and skin-on filets, and whole headed and gutted options.
- Taste and quality levels vary between species of salmon. Consult the table below to choose the type of salmon that best meets your needs.

<table>
<thead>
<tr>
<th>FROM PREMIUM TO BUDGET-FRIENDLY</th>
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</thead>
<tbody>
<tr>
<td>King (Chinook)</td>
</tr>
<tr>
<td>Sockeye</td>
</tr>
<tr>
<td>Coho (Silver)</td>
</tr>
<tr>
<td>Keta (Chum)</td>
</tr>
<tr>
<td>Pink</td>
</tr>
</tbody>
</table>


Take advantage of salmon being the third most popular seafood option for customers. Add different salmon dishes to increase your range of offerings.
Samuels & Son Seafood Co.

Samuels Distribution Area

New York City
Long Island, NY
Entire State of NJ
Atlantic City, NJ
Trenton, NJ
Jersey Shore Coastline
Entire State of PA
Philadelphia, PA
Bethlehem, PA
King of Prussia, PA
Pittsburgh, PA
Entire State of DE
Wilmington, DE
Delaware Beaches
Entire State of MD
Baltimore, MD
Eastern Shore, MD
Annapolis, MD
Washington, DC
Northern Virginia
Alexandria, VA
Richmond, VA
and Everywhere in Between

Samuels Services Every Major City in the Mid Atlantic and Areas in Between.
Gordon Foodservice

Wild Flavor

The waters of Alaska meet a splash of Trade East® spice.

With consumers placing more emphasis on health and wellness, sourcing of food, and bold flavors, there has never been a better time to promote Alaskan Seafood.

High in protein and essential nutrients, low in saturated fat, and a natural source of Omega-3 fatty acids, Alaskan Seafood is the ideal choice for people who want to enjoy optimum health.

From rich-tasting, wild-caught Salmon to tender Halibut, Cod, and Pollock to smooth-wanting Crab, Alaskan Seafood offers a variety of options for everyone’s palette. And, with Chef In Focus offerings paired with Trade East’s savory seasonings, creating unique signature dishes has never been easier—so delicious.

For more information about seafood from Alaska and Trade East spices, contact your Gordon Food Service® Customer Development Specialist.
### Canned Pink Salmon

**Product Description:**
Gordon Foodservice offers a variety of canned pink salmon options, each with unique characteristics. The table below outlines the different varieties available:

<table>
<thead>
<tr>
<th>Package Code</th>
<th>Description</th>
<th>Amount</th>
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<tr>
<td>37</td>
<td>Not specified</td>
<td></td>
</tr>
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</table>

**Preparation Instructions:**

1. **Wash Hands:** Wash all hands, unpackaged product under running water. Drain well. Slice the bread with an electric slicer. Place in a covered storage container, fabricated, or refrigerated product. Drain salmon and reassemble in the same manner until just before use.

2. **Season:** Add salmon and reassemble in a container and reassemble as desired. Label with any need to refrigerate. Place in a covered container and reassemble as desired. 

3. **Pep Probes & Crates:**
   - Brush one side of the bread slices with oil. Place sliced side down on a heated surface grill or a hot griddle using a press, and pour until golden brown. 
   - When each piece is half-done, add a drizzle of oil just before the edges look through, and the center is more pink. 
   - Place a slice based on the points, and serve with a topping. Serve immediately.

**Offer Valid on Purchases Made from January 27–April 20, 2014:**

Purchase the Gordon Foodservice Alaskan Wild-Caught Sockeye and product in its frozen or refried form to receive a $5.00 rebate per case. Maximum rebate of $50,000. Offer valid on new business only (products not purchased in the previous six weeks). Customers with contract or special pricing on the items listed below are not eligible.
Distributor Promotions

- ASMI continues to see positive results.

- ASMI promotions often result in significant sales increases over other product categories (10-15% is typical distributor promotion goal).

- Increase sales come from promotional activities, however the emphasis is on generating new case sales and new customers.
Conferences & Events

The Foodservice Program participates in several conferences and events throughout the year. These events are carefully selected to make sure we are getting in front of the right people: Marketing, Chefs/R&D & Influencers.

- National Association of College & University Food Services (NACUFS)
- Les Dames d’Escoffier
- National Restaurant Association/Marketing Executives Group (MEG)
- International Corporate Chefs Association
- International Association of Culinary Professionals
- Center for the Advancement of Foodservice Educators (CAFÉ)
- Global Culinary Innovators Association
- CIA World of Healthy Flavors Conference
- CIA Healthy Flavors, Healthy Kids
- CIA Menus of Change
- Women Chefs & Restaurateurs
- Seafood Expo North America
NACUFS National Conference
CIA Healthy Flavor, Healthy Kids
Roasted Alaskan Cod with Warm Fruit Salad and Pea Tendrils
Menus of Change Initiative
Open up a World of Flavor

From a land of untouched wilderness and pristine waters comes uniquely delicious and uniquely nutritious wild Alaska salmon. An excellent source of omega-3s and protein that is also low in saturated fat and rich in many essential vitamins and minerals, canned and pouch salmon from Alaska deliver unparalleled nutrition along with the incredible flavor and prized texture that have inspired leading chefs for generations. In this recipe collection you’ll find an exciting and inspiring variety of recipes developed with the latest culinary trends in mind to help you open your guests up to a whole new world of flavor.
FY 14 FS Ad Campaign – Brought it Back to Food
FY14 Foodservice Advertising

Print
- Food Arts
- Plate
- Flavor & The Menu
- Food Management
- NRN
- QSR

Digital
- Plate Enews
- QSR AM Jolt Enews
- NRN.com
- NRN am Enews
- NRN, RH Eat Beat Enews
- NRN, RH, FM Recipe Watch ENews
Print Ads – It’s All About the Food

How do you get there? Ask for Alaska. If you’re passionate about what you cook, satisfy your wildest desires with the amazing taste of succulent, and sustainable seafood harvested from the purest Alaskan waters.

The fast lane from ATTRACTION to OBSESSION

A direct route from DESIRABLE to DEVOURABLE

A quick turn from TEMPTATION to GOTTA HAVE IT
Digital Ads – It’s All About the Food

How do you get there?
CLICK HERE for this recipe and more tempting seafood ideas.

How do you get there?
CLICK HERE for this recipe and more tempting seafood ideas.

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CLICK HERE for this recipe and more tempting seafood ideas.
#1 Attention Getting Ad – Flavor & The Menu

**High Scoring Ads**

<table>
<thead>
<tr>
<th>Advertiser</th>
<th>Page</th>
<th>Product/Service Category</th>
<th>Size/Color</th>
<th>Issue Average:</th>
<th>Attention-Getting</th>
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<td>Alaska Seafood Marketing Institute</td>
<td>39</td>
<td>Commodity Board</td>
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<td>93%</td>
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<tr>
<td>McIlhenny/Tabasco</td>
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<tr>
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<td>Commodity Board</td>
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<td>87%</td>
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**Survey Respondents**

*Base: 220 respondents*

- QSR/Fast-casual
- Casual/Family dining
- Upscale/Fine-dining
- Hotel/resort/club/cruise
- Foodservice consultant
- Foodservice operator: other

Alaska Seafood Marketing Institute

*Page: 39*
Fish Sandwiches: Opportunity for Growth
Consumers are much more likely to order a fish sandwich from a chain restaurant if the ASMI logo appears on the menu.

<table>
<thead>
<tr>
<th>Likelihood to purchase a FISH SANDWICH based on...</th>
<th>Very Likely (4 to 5)</th>
<th>Likely (3)</th>
<th>Not Very Likely (2)</th>
<th>Not At All Likely (1)</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ASMI Logo]</td>
<td>73%</td>
<td>24%</td>
<td>2%</td>
<td>1%</td>
</tr>
</tbody>
</table>

*Wild, Natural & Sustainable®*
91% would pay a little more for an Alaska seafood sandwich...

Color Codes:

- Expect to pay / be willing to pay MUCH MORE
- Expect to pay / be willing to pay SLIGHTLY MORE
- Expect to pay / be willing to pay SLIGHTLY LESS
- Expect to pay / be willing to pay MUCH LESS

Nearly one-in-five would be willing to pay much more. This again points to consumers’ established premium perceptions of Alaska fish/seafood.
Key Takeaways

• Grilled fish sandwiches: huge opportunity
• Fried fish sandwiches still strong
• Fish taco opportunities
• The Alaska Brand motivates a sale; improves perception of the restaurant; 91% would pay more for an Alaska Seafood Sandwich
• The menu drives the fish/seafood decision
• Lots more detail in summary and Datassential deck
Thank you!

Questions?