



Alaska Seafood Marketing Institute

INTERNATIONAL MARKETING COMMITTEE MEETING

December 4, 2024

9:00 a.m. – 4:30 p.m. AKST

All Hands on Deck

Mid Deck, Captain Cook Hotel, Anchorage, AK

DRAFT Minutes

INTRODUCTION

A. Interim Chair Lovejoy called the meeting to order at 9:01am.

B. Roll Call:

Present: Bart Lovejoy, Alan Gross, Brian Hogden, Frank O’Hara, Joel Peterson, Michael McGinley, Nick Souza, Shigeki Okano, Stephen Rhoads, Rich Riggs, Tomi Marsh, Duncan Fields

Not Present: Rasmus Soerensen, Jeff Stephen

Guests: Brody Pearson, Alex Phil, Julie Yeasting, John Daly, Bob Barnett, Tom Sunderland, Bill Sullivan, Sean Dolan, Robert Gershberg, Daniel Kusakari, Julia Ying, Merle Knapp, ASMI staff.

C. Gross motioned to approve the agenda. McGinley seconded.

D. O’Hara motioned to approve the draft minutes from the previous meeting. Gross seconded.

E. Lovejoy read the ASMI Antitrust Statement.

F. Lovejoy welcomed two new members to the IMC Nick Souza and Brian Hogden. He thanked outgoing members George Li, Julie Yeasting, and Bob Barnet.

G. Public Comment:

None was made.

REPORTS

International Marketing Director Nicole Alba welcomed new IMC members and thanked outgoing IMC members. She introduced the team and gave an update on the international team duties. She also reminded the committee of the IMC secure portal on ASMI’s website and that there are many reports available including CPRs, quarter reports, and success stories. She also reminded the committee of the weekly and monthly updates that are sent via email.

Lovejoy explained that seafood is the most consumed protein in the world, and we must lift up Alaska by telling our story to drive home the message about what Alaska seafood is about. He reminded the committee to use ASMI resources to tell the story of Alaska Seafood.

North Link Aviation Presentation

Sean Dolan, CEO North Link Aviation presented NorthLink’s express freight and e-commerce terminal at the Ted Stevens airport in Anchorage, Alaska. He recognized that Alaska seafood producers need higher prices for their high value product and that most freighters flying westbound from ANC are nearly empty. He presented potential solutions to leverage unused capacity, including cold storage infrastructure, regulatory support, cargo handling, strategic location, and technology.



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Responsible Fisheries Management Program

Tom Sunderland, Global Seafood Alliance (GSA), presented on the Responsible Fisheries Management (RFM) program and explained that it is a wild capture certification and chain of custody program. He discussed the expansion of RFM to a global scope and the partnership with GSA. Sunderland will distribute materials via email to the committee with more details.

O'Hara asked how to get more auditors to certify RFM. Sunderland responded that the actual problem is getting more certifying bodies (CB) to work with RFM. He expressed that having industry members on RFM's side when talking with certifying bodies would be hugely beneficial and helpful.

McGinley asked about the selling points of RFM. Sunderland answered that it's about maximizing supply base and cost savings. You can reduce costs by broadening out to a GSSI benchmark rather than only MSC.

RAPP Initiatives and Federal Funding Update

Alba presented on RAPP Initiatives and other federal funding updates. Tranche 1 funding was awarded to ASMI international at \$4 million and is being used for FY25 program year. Tranche 2 funding was available for application in August, and it included the EU. ASMI's application was submitted in October and the award will be announced by Christmas. The amount is still unknown, but she hopes we will be awarded at least the same as tranche 1. However, with EU as an eligible market many more cooperators have applied for the same funds. Tranche 2 funding will support the FY26 program year. ASMI's MAP award will not be announced until there is a farm bill extension. The final budget will be presented at the IMC spring meeting (date TBD).

India feasibility study update: RFP has been completed; ongoing contract discussions with selected contractor; work will begin at the start of the new year and the feasibility study will be presented at the IMC spring meeting.

MENAWA OMR RFP: phase 1 evaluations have been completed, and phase 2 will consist of in-person interviews in January. The current plan is to onboard new OMRS in late January with their first activity being Gulfod trade show in February.

Species Committee Feedback Review

The discussion around the whitefish committee's recommendations for international opportunities included:

- The importance of securing tariff exemptions for Alaska-origin products in upcoming tariff negotiations.
- The significant price gap between Atlantic and Pacific cod, presenting an opportunity to push Pacific cod in the market as an easy substitute.
- Flexibility within the programs when faced with time-sensitive recommendations, allowing for potential adjustments.
- The challenge of tracking cod shipments to the EU, with a suggestion to collaborate with the trade to better promote the species.
- Plans to promote flatfish internationally, with new funding allocated to focus on this species.

The discussion around the salmon committee's recommendations for international opportunities included:

- Tinned fish trends expanding beyond the UK. ASMI promotions are happening in the Netherlands and other EU regions.
- Product development for pink salmon, including partnering with overseas canners to create smaller, more appealing cans.
- Reviving the frozen pink salmon market in European countries. The quality of frozen pink salmon has improved and is more consistent than keta salmon.
- Proactive promotion is needed for pink salmon across all formats.



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- Stable supply is crucial for international markets, and strategies for supporting markets during low supply years were discussed, including educating customers on the two-year nature of pink salmon and combining pink, sockeye, and chum to maintain support the market.
- Messaging should include that these species are wild and catch volumes are wild. The products are wild and precious in nature.

The discussion around the sablefish and halibut committee's recommendations for international opportunities included:

- Sablefish marketing efforts directly to chefs. With west coast quotas increasing, there is opportunity for differentiation through Alaska origin and RFM certification callouts. Having chefs choose to work with Alaska product.
- Approximately 75% of sablefish is going to Japan, mostly smaller sizes.
- Not all markets may be appropriate for sablefish, so focusing on niche markets that offer the best return is recommended.
- There is room for training in LATAM (Brazil), especially in food service, where knowledge gaps make it harder to work with the product.
- Potential for sablefish in the MENAWA region, particularly in UAE's HRI sector.
- The International culinary retreat is an opportunity to educate chefs from all regions.
- The key to smaller new markets for these products is mixed container shipments.

The discussion around the shellfish committee's recommendations for international opportunities included:

- Yakata-san explained the idea behind the marketing of Bairdi as "Queen Crab" at Aeon in Japan. The campaigns have been very successful.
- Bairdi is a very good product as an alternative to king crab in high-end markets. It's a large crab with a nice, sweet taste.
- The lack of availability of Bairdi in Europe.
- The importance of encouraging customers to buy during the season, when it is available.
- Opportunities to educate consumers about the bounty and nature of wild harvest fisheries. 'Get it while you can' messaging.
- Crab pricing is at an all-time high right now and most is staying in the domestic market. Within a few more seasons there should be more availability.

Knapp played an advertisement for pink salmon and discussed similar opportunities for fish fingers.

Yakata-san presented on the ASMI Japan program. Highlights included the weak yen, competitions and challenges such as seafood from Russia, more farmed seafood, aging population, and changing lifestyles. Other topics included RAPP funded activities, the Alaska Seafood Trade seminar attended by ASMI Board Chair Allen Kimball and Executive Director Jermy Woodrow and an Alaska pollock surimi promotion to consumers for datemaki. Lowlights included challenges working with the ATO and US embassy in Japan, as events with multiple partners dilutes Alaska Seafood branding.

Welsh and Welsh presented on the ASMI Southeast Asia program. Highlights included Indonesia Halal certification being pushed back for U.S. products for 2 years, competition from Norwegian seafood featuring a famous Thai actress, RAPP initiatives including Malaysian networking dinner and trade meetings and a cooperative promotion with Long John Silver's Malaysia, and Sizzler Thailand. Lowlights included a menu promotion with high end restaurants in Singapore where supply and quality issues arose and caused delays. Upcoming events include Indonesia trade mission, and trade shows Thaifex, Vietfish, and Seafood Expo Asia.



Discussion continued about Halal certification.

Pan and Feng presented on the ASMI China program. Highlights included Chinese economy slow-down and the government's encouragement of tourism with visa-free entry for some nationalities and consumption vouchers. Strong demand for imported seafood has led to fierce market competition. Russian product is abundant and offered at lower cost. Norway seafood is conducting influencer campaigns, retail promotions, and attending trade shows. Upcoming activities include Chinese New Year promotions, HOFEX trade show, and cooking video development. Key strategies for the future include continuing to use the Alaska origin concept in promotions, exploring new traders, and increasing consumer awareness.

The meeting recessed at 12:26pm for lunch break.

The meeting resumed at 1:18pm.

McClellan presented (pre-recorded) on the ASMI Southern Europe program. Challenges included large amount of Russian product in the region, especially pollock and cod, the price gap between wild and farmed salmon, and 15% EU import duty on sablefish vs. 0% on Canadian sablefish. Highlights included an introduction of a new Alaska origin ID salted cod product. Lowlights included pollock products rarely being manufactured with Genuine Wild Alaska products. Upcoming events include SEG and Conxemar trade shows and 3 wild Alaska restaurant week promotions in Lisbon, Milan and Barcelona.

Hombeck presented on the ASMI Central Europe program. Highlights included overall improvement in the economy of the region with the main exception being Germany, which had the slowest economic growth, retail continues to perform strongly but HRI is under pressure. He explained consumers are feeling "green fatigue", so the program has been focusing on premium quality, pristine aroma and nutritional value instead of sustainability. He asked to know where Pacific cod is going in Europe so they can be sure they are working with the correct partners and promoting premium products. RAPP plans include innovative Alaska R&D campaigns and Alaska private label omnichannel promotions.

Tonkovich and Parker presented on the ASMI Northern Europe program. Highlights included that food and seafood inflation are down, consumer confidence and disposable income have increased, retail seafood sales show modest growth, with Atlantic whitefish volumes facing pressure. Tonkovich asked that the industry reach out and let them know where products are ending up so they can support with promotions. Under RAPP, NEU is focusing on diversifying marketing efforts including consumer OOH promotions, diversified food service, and seafood eating occasions. Building on the winning formula from previous promotions with LEAP, the team continues to support and create new campaigns. LEAPs brand awareness is at a record high, nearly doubling since last year and there is an increase in sales. Upcoming events include Alaska Seafood Retreat and Wilderness Reserve, Tins and Fins pop up in the Netherlands, and a reverse trade mission with a group of buyers from Urk.

Gorovaia presented on the ASMI Eastern Europe program, which now includes 11 countries. Highlights included new team members and regional developments: pro-European candidate winning in Moldova, pro- Russian party winning parliamentary election in Georgia, Ukraine's fish imports rebounding to pre-war levels, the US as a key supplier in the region, anti- Russia measures in the Baltic states, i.e. a complete ban of Russian fish imports in Lithuania in June 2024, and a sharp decline in Russian fish imports to Latvia. She also reported on successful roe activities in Ukraine, Lithuania, and Moldova.



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Hombeck presented on the ASMI WEU program. Highlights included future RAPP promotions such as 'Know Your Fish' program that will respond to interest in the traceability of seafood products and a yellowfin sole push in the region with Cite Marine.

Lecarnaque and Silveira presented on the ASMI LATAM program. Highlights included a rise in imports in both value and volume in the region, growth in seafood consumption thanks to a rise in healthy consumption habits, diverse product formats, and a growing awareness of benefits. Program successes included a social media overview, AK pollock influencer campaigns, and product availability in main retail chains of Colombia, Mexico, and Peru. Lecarnaque thanked the industry for their support in the region, and noted there has been a recent increase in importers (2 total) and products (4 new products using salmon species and AK pollock) available in the region. Lowlights included keta salmon promotions due to price sensitivity and meat color. RAPP activities included partnerships with CLIA, focusing on Peru as a reprocessing center, opening new markets in central America and the Caribbean, and supporting trade and education.

Operational Committee Board Recommendations

The IMC discussed the board questions. See answers in attachment.

Chair and Vice Chair Elections

Peterson made a motion to nominate Bart Lovejoy as chair. Rhoads seconded. All were in favor. Motion passed.

Souza nominated Michael McGinley as vice chair. Okano seconded. All were in favor. Motion passed.

Lovejoy thanked ASMI staff for their hard work around the world, welcomed new members Nick and Brian and gave a heartfelt farewell to outgoing members.

ADJOURNMENT

Peterson motioned to adjourn the meeting. Souza seconded. All were in favor. Motion passed.

The meeting adjourned at 4:30pm.