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FY26 Accomplishments & FY27 Outlook

Region/Country: Southern Europe (Spain, Portugal, Italy, Greece)

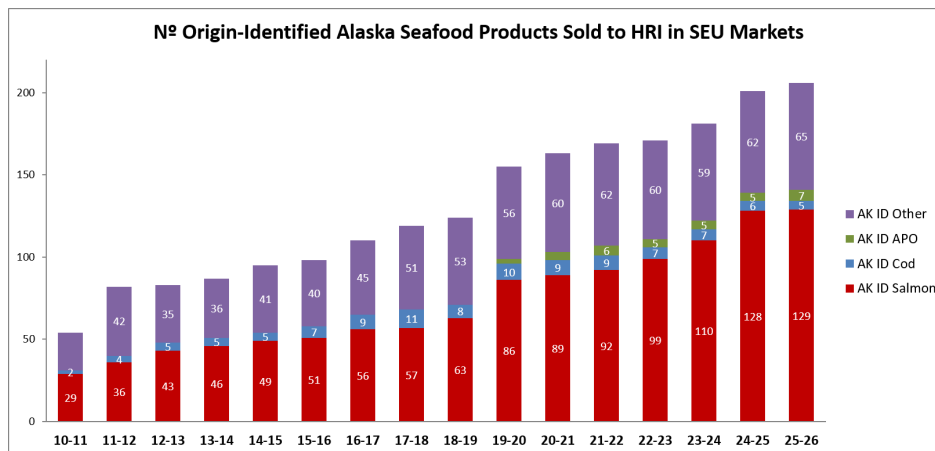
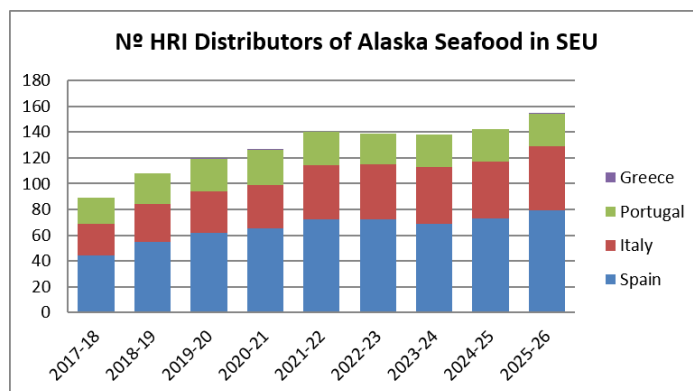
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1. TOP 3 ACCOMPLISHMENTS – FY26

Executive Summary

A big part of the ASMI-SEU program each year is the Seafood Expo Global and CONXEMAR trade shows where we work to facilitate buyer-seller meetings and expand our industry's relations with seafood importers and distributors. ASMI-SEU has also begun participating in additional food trade shows in Italy, Portugal, and Greece to help introduce Alaska seafood to local trade in these countries and facilitate their sourcing needs.

And because the hotel and restaurant industry in Southern Europe (SEU) is an exceptionally large consumer of seafood, and because the seafood products used by chefs in each of these countries has a large influence on consumer awareness of these products, ASMI-SEU conducts a very active HRI promotion campaign each year: HRI trade shows, chef and HRI distributor salesforce trainings, and HRI-directed advertising, PR events, and social media actions, always in collaboration with local HRI distributors of Alaska seafood products. The results have been a steady growth in the number of HRI distributors of Alaska seafood products and growth in the number of Alaska seafood products available to chefs through these distributors.



ASMI-SEU's HRI marketing campaigns and the consumer awareness they have generated have also driven a large part of the growth in retail distribution and sales of Alaska seafood products in the region.



In 2026-27, ASMI-SEU plans to continue combining its trade show/trade servicing activities with HRI promotions and targeted retail and consumer promotions to build sales and distribution of Alaska seafood products in the SEU markets and to build consumer and trade awareness of the high-quality, wild and sustainable attributes of Alaska seafood.

TOP 3 ACCOMPLISHMENTS – FY26

1. Activity: CONXEMAR 2025 & Seafood Expo Global 2026

- Nº participating Alaska Seafood companies & organizations: **35**
- Significant buyer/seller meetings: **352**
- Estimated value of on-site sales of Alaska seafood: **\$51,623,500**
- Estimated value of 12-month projected sales generated by contacts met at the show: **\$469,337,000**
- New products and/or new suppliers introduced to local market: **17**
- Why it mattered: CONXEMAR and SEG continue to offer Alaska seafood exporters two of the best venues each year to meet current and potential overseas buyers.

2. Activity: Alaska Cod Menu Promotion with El Corte Inglés

- Objective: Create an Alaska Cod category within the SEU cod market
- Results: Replaced Norwegian cod with Alaska cod on the menus of 69 El Corte Inglés cafés and cafeterias in Spain.
- Quantifiable Impact: Projected sales June-Dec 2026 = 20MT light-salted Alaska cod loins





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- Why it mattered: **Brasmar** has made a serious commitment to working with and developing markets for origin-identified Alaska cod in Europe. This is ASMI's first collaboration with **Brasmar** to build sales and distribution of origin-identified Alaska cod.

3. Activity: Alaska Pollock Surimi Promotions in Spain & Italy

- Objective: Support **Viciunai** and **Angulas Aguinaga** marketing campaigns in Spain and Italy (influencer-driven social media campaigns, in-store promotions, TV and outdoor advertising) to promote sales and raise the perceived nutritional and culinary value of high-quality surimi made from genuine Alaska pollock.
- Results: Promotions running June through December 2026
- Why it mattered: These promotions expand distribution and generate new sales of high-quality surimi products made from genuine Alaska pollock and help solidify relations between Alaska's pollock industry and two of Europe's leading surimi importers.

2. PLANS FOR FY27

Strategic Priorities

- Expand distribution of Genuine Alaska pollock fillets in institutional kitchens, hotels, and restaurants as a high-quality and less-expensive option to cod.
- Defend distribution of wild Alaska salmon products currently in the market, esp. smoked and refreshed sockeye salmon, and Alaska salmon canned in olive oil, as 2026-harvest price hikes are transferred to retailers.
- Establish distribution of origin-identified Alaska Atka mackerel.
- Establish distribution of origin-identified Alaska rock sole and POP fillets.
- Expand distribution in restaurants of Alaska black cod.
- Continue to build the Alaska Seafood brand in Southern Europe by increasing trade and consumer awareness of Alaska seafood's unique healthy, flavorful, and sustainably harvested qualities.

Planned Activities 2026-27

Retail Promotions 2026-27

- Alaska Seafood comparative tasting for **retail purchasing managers** at the **U.S. Embassy in Madrid**
- Smoked Alaska sockeye salmon promotions with **Foodlab** and **COAM** in Italian supermarkets
- Smoked Alaska sockeye salmon promotions with **Vensy & Martiko & Benfumat** with Spanish retailers.
- Light-salted Alaska cod promotions with **Brasmar & Ardora Foods** in Spanish supermarkets.
- Salted Alaska cod promotions with **Pambuffetti** with Italian supermarkets & itinerant merchants.
- Alaska Pollock Surimi participation in the **International Pinchos & Tapas Competition** in Valladolid





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- Alaska surimi promotions in Spanish & Italian supermarkets with **Angulas Aguinaga & Viciunai**
- Introductory promotions of origin-identified Alaska flatfish in Italy in collaboration with **North Seafood/Kyokuyo**.
- Expected Outcomes:
 - Maintain current distribution and expand into new retailers with smoked Alaska sockeye salmon in Spain and Italy in the face of expected price increases.
 - Expand distribution of Alaska-origin salted and light-salted cod.
 - Increase distribution and sales of high-quality surimi products made from genuine Alaska pollock surimi.
 - Help overcome negative narratives around surimi among consumers in Italy and Spain.
 - Introduce at least one origin-identified Alaska flatfish fillet product in the Italian market.

Digital Marketing Activities 2026-27

ASMI-SEU will use digital marketing primarily to broaden the reach of its retail and HRI promotional activities:

- **Support retail promotions** with influencer & ASMI social media actions.
- Use influencer & ASMI social media actions to **expand trade awareness** of ASMI chef and salesforce trainings, comparative tastings, and HRI trade shows and PR events.
- **Raise consumer demand** for Alaska seafood products with consumer-directed ASMI social media actions and collaboration with seafood specialist influencers like [GastroBio](#).
- All digital marketing actions link to our Spanish, Italian, Portuguese, and Greek **Alaska Seafood websites** constantly updated with product and nutritional information, and local suppliers, retailers, and restaurants where Alaska seafood products are sold.

Public Relations Events 2026-27

- May-June 2027 **Alaska Seafood Reception** at the U.S. Consulate in Barcelona, Spain
- 2026-27 **Foodie Magazine chef events** in Madrid, Barcelona, and Girona, Spain
- Expected Outcomes:
 - Help SEU distributors increase their sales and customer bases for Alaska seafood.
 - Increase SEU chef and consumer awareness of Alaska seafood products and their high-quality, wild and sustainably harvested attributes.

Trade Marketing: Food & Seafood Trade Shows 2026-27

- Oct. 6-8, 2026 – **CONXEMAR** in Vigo, Spain
- Oct. 11-13, 2026 - **iFish** in Bologna, Italy
- Feb. 15-17, 2027 - **Food Affair Lisbon**, Portugal
- Mar. 20 – 22, 2027 – **Food Expo Athens**, Greece
- Apr. 20-22, 2027 – **Seafood Expo Global** in Barcelona, Spain
- Expected Outcomes:
 - Improve number of significant meetings per participating Alaska company or organization from 10 to 11.





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- Identify local distributors interested in distributing and promoting Atka mackerel from Alaska.
- Support local distributors of Alaska seafood products by attracting and identifying new potential retail and HRI customers.
- Identify local distributors, retailers, and foodservice operators interested in promoting Alaska seafood products.

Other Trade Marketing Activities 2026-27

- **Genuine Alaska Pollock Salesforce & Chef Trainings** in Spain, Portugal, and Italy
- Support six **Garcimar Food Experience** in-house distributor trade events
- **Alaska Seafood Samples Program** – provide test-quantity samples of Alaska seafood products for reprocessing to seafood processors in Southern Europe.
- Expected Outcomes:
 - Help SEU distributors increase their sales and customer bases for Alaska seafood.
 - Convince at least one SEU seafood processor to import Alaska seafood rockfish or flatfish for re-processing.

Foodservice Promotions 2026-27

- **Alaska Seafood “A La Parilla” Chef Grilling Contest**
- **Chef Trainings:** comparative tastings (wild vs farmed salmon, Pacific vs Atlantic cod, sablefish vs escolar, etc.)
- **Wild Alaska Week** Restaurant Promotions in Barcelona and Milan
- **Sponsorship of the Italy Sushi Cup 2027 competition**
- **Chef Ambassadors used at chef-directed events: HRI trade shows, receptions, comparative tastings, and relations with journalists**
- **6 HRI Trade Shows** w/ chef-led cooking demonstrations & tasting sessions (listed in FY27 EVENTS below).
- Expected Outcomes:
 - Help SEU distributors increase their sales and customer bases for Alaska seafood.
 - Increase SEU consumer awareness of Alaska seafood products and their high-quality, wild and sustainably harvested attributes.

Consumer Education Activities 2026-27

- Collaboration with seafood specialist influencer Arnau Subías of **GastroBio**
- Chef sponsorships at the **Tast a la Rambla** street food fair in Barcelona, Spain





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3. FY27 EVENTS

Event	Date	Location	ASMI role in event
Independence Day Reception	1 July 2026	USA Consulate, Barcelon, Spain	Alaska Pollock Surimi “Pintxo Vasco” tasting booth
CONXEMAR Seafood Trade Show	6-8 Oct. 2026	Vigo, Spain	200m2 Alaska Seafood pavilion
iFish Seafood Trade Show	11-14 Oct. 2026	Bologna, Italy	Alaska Flatfish chef demo/tasting booth
Gastrónoma Valencia HRI Trade Show	26-28 Oct. 2026	Valencia, Spain	Support Garcimar and Cominport booths with Alaska Seafood product tastings
Gastronomic Forum Barcelona HRI Trade Show	2-4 Nov. 2026	Barcelona, Spain	Alaska Seafood booth w/chef demo/tasting kitchen
Concurso Nacional Pinchos y Tapas + Campeonato Mundial de Tapas	9-11 Nov. 2026	Valladolid, Spain	Alaska Pollock Surimi sponsorship
Alaska Seafood Comparative Tasting for retail purchasing managers	January 2027	Madrid, Spain	Hosted at the U.S. Embassy in Madrid
H&T Málaga HRI Trade Show	8-10 Feb. 2027	Málaga, Spain	Alaska Seafood booth w/chef demo/tasting kitchen
Food Affair Lisbon Food Trade Show	15-17 Feb. 2027	Lisbon, Portugal	Alaska Pollock Chef Workshop trade show booth
Facefood Mallorca HRI Trade Show	February 2027	Mallorca, Spain	Alaska Seafood booth w/chef demo/tasting kitchen
Expo HIP HRI Trade Show	1-3 Mar. 2027	Madrid, Spain	Alaska Seafood booth w/chef demo/tasting kitchen
Food Expo Athens Food Trade Show	20-22 Mar. 2027	Athens, Greece	Alaska Pollock Chef Workshop trade show booth
Facefood Ibiza HRI Trade Show	March 2027	Ibiza, Spain	Alaska Seafood booth w/chef demo/tasting kitchen
Alaska Seafood “A La Parilla” Grilling Contest	March 2027	Madrid or Barcelona, Spain	Alaska seafood grilling contest for professional chefs





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Event	Date	Location	ASMI role in event
Alaska Seafood Wild Week	17-25 Apr. 2027	Barcelona, Spain	Alaska seafood restaurant promotion
Seafood Expo Global Seafood Trade Show	20-22 Apr. 2027	Barcelona, Spain	635m2 Alaska Seafood pavilion
Salón de Gourmets food trade show	26-29 Apr. 2027	Madrid, Spain	Support Garcimar and Cominport booths with Alaska Seafood product tastings
Tast a la Rambla gourmet food street fair	May 2027	Barcelona, Spain	Alaska Seafood support for 1-2 participating top Spanish restaurants
Alaska Seafood Reception	May-June 2027	Barcelona, Spain	Multi-station Alaska seafood chef demo/tasting event at the U.S. Consulate in Barcelona, Spain
Italy Sushi Cup chef competition	June 2027	Milan, Italy	Alaska Seafood sponsorship of the 2027 edition of Italy's top sushi chef competition

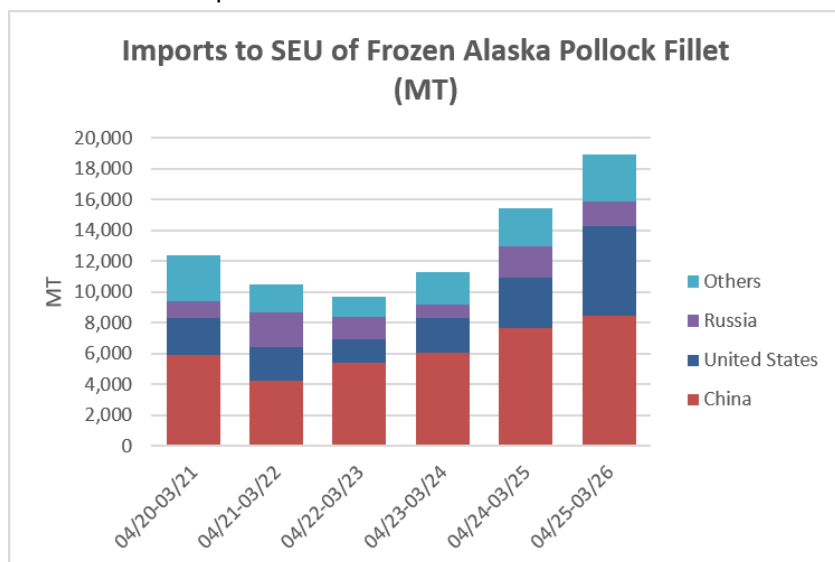
RISKS / CHALLENGES

The 2025-26 market year saw increased export volumes to Southern Europe (SEU) of Alaska pollock fillet and surimi and Alaska sablefish, and decreased exports of Alaska cod and salmon.

- 1) The **EU CATCH** system is a major concern for our customers but negotiations seem to be going in the right direction with the Nov. 30 extension. Importers complain that:
 - a) they now face a general **10-14 day delay** getting documents validated by customs due to administrative overload caused by this new system
 - b) the **new health certificate** is now 10 pages long instead of 4 pages
 - c) the additional administrative load drives Alaska exporters to **favor large established buyers** at the expense of new customers and smaller specialists, both fundamental to entering new markets, to the introduction of new seafood products, and to building distribution and sales in current markets.
- 2) SEU smokers, canners, and distributors of **wild Alaska salmon** have had difficulty obtaining sufficient 2025-harvest salmon and difficulty securing commitments for 2026-harvest salmon from Alaska. Price indications are significantly higher than last year's and there is concern that their customers will not accept another price hike.
 - a) There is strong and growing demand for farmed salmon in SEU. Prices have been relatively low while most seafood prices have risen.
 - b) More Chilean coho and *salmo salar* than ever is coming into Europe for smoking and canning.
 - c) Japan is now offering cheaper Russian sockeye to Europe though little if any has entered SEU markets in the past year.



- 3) Alaska black cod continues to gain popularity in restaurants across the SEU region despite record high prices. Alaska sockeye salmon is also gaining consumer recognition and popularity.
 - a) **But** importers have increasing problems with **high parasite counts** in sockeye and sablefish. At least one Alaska processor is already blacklisted by EU because of parasites in salmon.
- 4) Three importers in Portugal, Spain, and Italy have **launched origin-identified Alaska cod** products in their markets in the last year.
 - a) **But** high prices for both Atlantic and Pacific cod are causing a **major reduction in cod sales** volumes as customers switch to lower-priced options.
- 5) **Alaska pollock fillet** imports from the U.S., China, and Russia are growing as institutional caterers and consumers look for less expensive whitefish alternatives to cod and hake.



- 6) **Alaska flatfish fillets** are sold in SEU, mostly in Italy and Greece and all reprocessed in China with no identification of origin. We will work with an Urk-based re-processor to **promote genuine Alaska flatfish in Italy in 2026-27**.
- 7) Wild-caught seafood prices are rising faster than prices of farmed seafood, while at the same time consumers increasingly **associate “wild” with premium-quality seafood**.

