



Wild, Natural & Sustainable®

**DATE:** April 14, 2021  
**TO:** ASMI Board of Directors  
**FROM:** Hannah Lindoff, Senior Director of Global Marketing & Strategy  
**RE:** International Program Report

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The international program received a Market Access Program (MAP) funding award of \$4,493,502 for FY21. The FY 2021 international program spend plan also includes \$475,000 in planned MAP rollover, \$1,282,000 in Agricultural Trade Promotion Program (ATP) funds and \$2,495,000 in matching funds, for a total budget of \$8,745,502 to conduct marketing programs in nine regional programs across the globe. Included in this budget are ATP funds specifically set aside to fund activities managed by the technical program, communications program, and sustainability program. This budget reflects the broad diversification strategy that ASMI international embarked upon with the advent of ATP funding in 2019. The budget also reflects a five-year spend plan for ATP.

The ASMI international program was pleased to welcome Kara Hollatz back to ASMI. Kara is reprising her role as the marketing specialist for Europe and will be leading efforts to coordinate Seafood Expo Global in September of 2021- we hope. Nicole Stangeland continues to work with the EEU and S. America programs and lead grant compliance for both ATP and MAP and Nanette Solanoy supports all programs and brings design expertise to the program. Nanette helped with efforts in Korea, where we do not have an OMR, and designed an ad for yellowfin sole and cod to run in *Costco Connection*.

With travel completely canceled over the past year, ASMI international has spent a great deal of time in different trade advocacy and other advocacy roles. Lindoff and Ex. Dir. Woodrow continue to meet weekly with a group of seafood industry members to discuss trade and policy advocacy and work on joint letters to new administration officials. Additionally, Lindoff and Woodrow collaborated on in-state efforts, providing a briefing paper on China and a request for Recovery act funding. Lindoff joined the seafood trade group to brief USTR and trade agreements with the UK and EU are being monitored. The China trade situation and the Russian embargo have not improved but Lindoff and Technical Dir. Burrows worked together to try to craft a resolution to a health certificate issue in Brazil.

Lindoff continues to serve as the ex-officio for the Certified Seafood Collaborative (CSC) and with Sustainability and Certification advisor Susan Marks and Communications Director Heimbigner, has organized a webinar to address social responsibility questions coming from the industry, primarily in Europe. Lindoff also presented to the Northwest Fisheries Association on April 21<sup>st</sup>.

Since the beginning of the pandemic, ASMI international has conducted three waves of research in Asia and found positively, seafood purchasing in Asia has stabilized in Phase III, as two-thirds of the consumers are purchasing it at least once every two weeks – in line with Phase II findings, however remaining lower compared to Phase I (66% vs. 67% in Phase II and 81% in Phase I). In addition, while current purchasing of AK seafood is somewhat lower than levels seen in Phase II (35% at least once every 2 weeks vs. 40% in Phase II), future purchase interest has climbed – as nearly four-fifths of the shoppers reported they would buy AK seafood in the future if it were available where they normally shop at an acceptable price (78% vs. 73%) – exceeding our normative goal of 70% for this key measure.

## ASMI International Programs

- In addition, a majority of consumers are currently shopping at the supermarket for AK seafood – an increase compared to Phase II findings (51% vs. 42%) and almost on par with anticipated behavior (52%), followed by nearly two-fifths who mentioned shopping at the hypermarket – in line with Phase II findings (37% vs. 36%), with expected growth once a vaccine is available (42%).
- Also, favorable trust in AK seafood has increased marginally compared to Phase II, however remaining lower compared to Phase I findings (AK seafood – 45% vs. 42% in Phase II and 60% in Phase I), with AK seafood directionally more trustworthy compared to U.S. seafood in general (45% vs. 41%).
- In terms of fresh product safety by country, while only 27% of the Asian consumers currently consider fresh products from the U.S. to be safe (vs. 26% in Phase II) compared to 55% in Japan and 48% in China, directionally fewer consumers agreed that the current COVID-19 infection rate in the U.S. makes them question the overall safety of the country’s agricultural products (including seafood) compared to Phase II findings (60% vs. 65%).
- Moreover, safety is even more important when shopping today, as a majority of the consumers played this back (54% vs. 48% the last two waves), again followed by price (45% vs. 39% in Phase II).
- Importantly, as the pandemic progresses, significantly more Asian shoppers anticipate their shopping behavior will be “somewhere in between” the way they used to shop prior to COVID-19 and the changes they’ve made due to it (Somewhere in between – 39% vs. 34% in Phase II and 30% in Phase I). In addition, 1 in 3 say that the changes they made will be permanent, with significantly fewer planning to go back to the way they used to shop (Phase III – 28% vs. Phase II – 32% and Phase I – 41%).

Encouragingly, seafood purchasing has also stabilized in Europe – as about three-fifths of the consumers are purchasing the product at least once every two weeks - on par with Phase II findings, however remaining lower than Phase I data (57% vs. 58% in Phase II and 64% in Phase I). Specifically, current purchasing of AK seafood (at least once every two weeks) is also in line with Phase II findings (46% vs. 47%), with future purchase interest in the AK product remaining very strong (75% vs. 78% in Phase II) – exceeding our normative goal of 70% for this key measure.

- On par with Phase II findings, the supermarket remains the primary outlet where AK seafood is purchased in Europe (63% vs. 64% in Phase II) and, similar to findings in Asia, current purchasing levels now mirror anticipated behavior (63% now and in the future), followed by nearly two-fifths who mentioned shopping at the hypermarket – marginally higher than Phase II findings (38% vs. 34%), with some upside expected once a vaccine is available (40%).
- Also positive, trust in AK seafood has climbed significantly compared to Phase II findings and is approaching levels seen in Phase I (56% - up from 46% in Phase II and 61% in Phase I).
- It should be noted, however, that a majority of the European shoppers continue to agree that the current COVID-19 infection rate in the U.S. makes them question the overall safety of U.S. food products (53% vs. 52% in Phase II), something ASMI should keep an eye on.
- Importantly, significantly fewer of the respondents indicated that they “plan to go back to the way they used to shop” compared to Phase I findings (37% vs. 40% in Phase II and 47% in Phase I), with directionally more reporting that they “anticipate that the changes they’ve made due to the pandemic will be permanent” (35% vs. 32% in Phase II and 27% in Phase I).

- Most importantly, in Asia and Europe, consumers site “Eating in a restaurant” for dinner, lunch, breakfast and brunch as four of the top ten things they are looking forward to, after the vaccine.

### CHINA

#### MARKET UPDATE

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- China, like the rest of the world, continues to battle the coronavirus pandemic. A Chinese vaccine has been produced and the government is looking to get it out to millions before the Spring Festival on February 11, 2021, a heavy period of travel. So far 10 million have been administered according to sources. During the past few months, there have been increasing cases, with domestically-transmitted and foreign-transmitted cases across the northeast, in parts of eastern China, and in central regions, which has begun to worry many. Experts are predicting smaller-scale travel and lower overall business. While this could spell disappointing holiday figures, a short-term squeeze may be necessary to keep the economy functioning and prevent any potential shutdowns. From businesses to consumers, everyone is moving forward slowly, and with caution, keeping close watch of the situation.
- China's total goods imports and exports expanded 1.9% year-on-year to 32.16 trillion yuan (about five trillion U.S. dollars) in 2020, hitting a record high despite a worldwide slump in shipments according to official data. Exports rose 4% while imports fell 0.7%, according to the General Administration of Customs (GAC). In December alone, exports surged by 10.9% year-on-year in yuan terms. During the first 10 months of last year, the country's foreign trade and exports accounted for 12.8% and 14.2% of the world's total, respectively, both reaching historic highs based on WTO data and national statistics.
- China continues to maintain a tight grip over all frozen, imported foods into the country and now, overall quantities are dropping. Multiple disinfections, certificates, manpower, and various government protocols have added to costs, dissuading companies from bringing in frozen seafood. In the past half-year, several countries, in South America and elsewhere, and most recently Russia, have encountered plenty of difficulties exporting to China.
- Hema Fresh (Fresh Hippo) has been the main retail channel for imported seafood under the Alibaba Group. At the beginning of the year, consumer demand for domestic seafood was generally stable, while sales of imported seafood showed a decline. A trend reflecting falling imports of frozen seafood, fresh seafood, and sashimi seafood products, and rising sales of domestic seafood in China have emerged.
- According to a market study, Hema Fresh’s main seafood consumers are young people, who pay more attention to product quality and service. At present, Hema Fresh has 20 million active members, and the repurchase rate of members is about 60%. Most of the consumers are women, aged between 23 and 40. According to statistics, this consumer group consumed three million lobsters and 200,000 king crab last year. Additionally, the consumption habits of Chinese consumers have also changed during the epidemic, and more and more middle-aged and elderly consumer groups are buying online. Chinese consumers have lost a bit of confidence in the safety of imported frozen foods, including seafood. However, with a large population, strong demand for seafood, and insufficient domestic supplies, imported frozen seafood has a strong, long-term growth opportunity, and should gradually return to former sales levels when coronavirus is brought under control.

**ACTIVITY UPDATE**

**CONSUMER PUBLIC RELATIONS**

*Press Coverage*

The second round of coverage is currently in progress, launched at the start of January. One hundred articles will be completed, involving online and offline media. The first round was completed in September 2020 and involved 100 articles, with 70 from online media and 30 from print media. Topics covered traditional areas of Alaska, Alaska seafood as green and sustainable food, its quality and nutrition, and highlighted some newer species. The articles were featured on a range of health, news, and lifestyle websites, as well as news print sources covering popular Tier I, II, and III cities.

*Advertisements on Print Media and Outdoor Advertising*

Three advertisements as part of the campaign have been completed, one in AM730 for Hong Kong, November 6, 2020; one in Trends Health, November 2020; and one in Women's Health, December 2020.



**RETAIL MERCHANDISE**

*In-store Promotion at Guangzhou Friendship Store in Guangzhou (five stores), October 10 – November 11, 2020*

ASMI China recently held an in-store retail promotion with five locations of the Guangzhou Friendship Store from October 10 - November 11, 2020. The Friendship Store in Guangzhou was a traditional state-owned purveyor of foreign goods starting in the 1950s and has transitioned into a high-end shopping mall, offering a range of premium goods, including imported and premium foods. Cod and pollock were featured during the promotion, two key Alaska seafood species. Promoters were hired to help attract shoppers and answer questions. While no samples were offered, a range of small gifts, including an insulated bag, and oven mitts were offered for purchases. As demand for quality products continues to grow, many players in the retail market outside of traditional supermarkets are joining in, such as eCommerce and trade companies. ASMI China will continue working with a variety of retailers to continue building awareness and driving sales.



*In-store Promotion at Hema Fresh/Leader in Qingdao (eight stores), October 12 – November 12, 2020*

In October, ASMI China reached out to retailers Hema Fresh and Leader to hold a retail promotion targeting consumers in China’s eastern province of Shandong, in the city of Qingdao, a rising Tier II city and an area with above-average consumption of seafood. Six Hema Fresh stores and two Leader supermarkets participated from October 12 - November 11, 2020, in the event which featured pollock and yellowfin sole. Promoters were hired to engage with shoppers but due to COVID, no samples were offered. Hema Fresh was selected as a partner because it has become favored by many middle-class families and especially with younger professionals. Leader Shopping Plaza Supermarket is a rising local business group that targets an older demographic, and together, allowed ASMI China to target a larger segment of China’s audience.



*In-store Promotion at Ocean Three in Hong Kong (nine stores), October 28 – November 28, 2020*

In the special administrative region of Hong Kong, ASMI China joined hands with Ocean Three and nine stores to launch an offline and online promotion, featuring salmon and black cod from October 28 - November 28, 2020. Alaska Seafood POS materials were stationed at each store with promoters. Also, 5,000 specially designed insulated bags with an ASMI logo were given to customers making purchases offline. At the same time, a banner with the ASMI logo was featured on the Ocean Three homepage, directing shoppers to Alaska seafood. To drive brand awareness, the ASMI logo was featured on the website. Finally, a print media advertorial was also published in U Magazine at the end of October.



## China

### *In-store Promotion at Ole' in Eastern China (14 stores), November 9 – December 6, 2020*

From November 9 - December 6, 2020, a large-scale retail promotion was held involving 14 Ole' supermarkets located throughout the eastern China region, covering the key cities of Shanghai, Ningbo, Wuxi, Hangzhou, and more. The stores featured pollock and black cod for the promotion with promoters, and food samples were offered. A small gift was given to shoppers making purchases, which also helped to boost Alaska seafood and Alaska Seafood awareness. Holding a large-scale event with a trusted retailer was great for driving awareness and sales.



### *In-store Promotion at Walmart in Guangzhou (5 stores), November 25 – December 24, 2020*

ASMI China held a retail promotion at the end of the year with Walmart, involving five stores from November 25 - December 24, 2020. For the promotion, pollock and black cod were highlighted, which have been key Alaska products and have been welcomed on the market. Promoters were hired for the stores and they handed out samples of Alaska seafood and attracted shoppers.



## TRADE SHOWS

### *Restaurant and Bar Hong Kong, November 11 – 13, 2020*

ASMI China participated in a Hong Kong trade show, November 11 - 13, Restaurant Bar Hong Kong, a collection of smaller trades covering a range of food products and key players in the HRI sector. This was the second time ASMI China participated in the show, featuring an 18 square meter booth. A booth chiller with iconic Alaska seafood products, including halibut, king salmon, king crab, and black cod, was displayed, and it was a great way to make a visual impact and showcase the quality of the product. At the booth, several videos, like the quality processing video, salmon recipes (a popular ingredient in Hong Kong), and footage of Alaska's wild and natural landscape were shown. The Hong Kong team answered many questions about Alaska seafood products, as well as took trade leads from visitors. Samples of smoked sockeye salmon and chum salmon roe were handed out to attendees, attracting visitors and giving them a better understanding of Alaska seafood. Finally, two products were featured in an ATO cooking demonstration segment, pink salmon and Pacific ocean perch, with some commentary and samples provided. Close to 50 trade leads were collected from the show.



## TRADE PUBLIC RELATIONS

### *Trade Gathering – “Four City Campaign”*

Trade gatherings have become especially important means of engaging with the trade community, especially as the coronavirus has limited large-scale events to meet with clients and collaborators. In the fall of 2020, ASMI China prepared a trade gathering campaign covering multiple cities. The originally planned seminars in Beijing and Hong Kong have been put on hold due to coronavirus. Beijing will be tentatively replaced by Chengdu in March 2021 and Hong Kong will remain the same.

Dalian October 27 - 66 traders attended, along with 30 members of the media

Shenzhen October 29 - 23 traders along with 32 media

Ningbo November 3 - 38 attendees

Nanjing November 4 - 40 attendees

Beijing November 24 -> Will be tentatively replaced by Chengdu, March 2021

Hong Kong -> Will be tentatively rescheduled for mid-March 2021

A total of around 140 seafood buyers and 62 media personnel (for Dalian and Shenzhen only), including key opinion leaders and a mix of offline and online platforms, were invited to the events. An Alaska seafood presentation was given and a tasting lunch followed. For some locations, a cooking demonstration was held, offering traders yet another way to understand Alaska seafood. The cooking demonstrations were engaging and brought together the traders as well as media and helped target two key segments of China’s audience. The media personnel benefited from the expertise of the traders, and also helped bring more visibility to the consumer space. ASMI China was very pleased with the results, touching base with clients and developing new relationships. The program looks forward to holding more multi-faceted promotions across China.



### *Newsletter*

The quarterly newsletter has been an effective way for ASMI China to keep members of the trade community up-to-date on recent ASMI events. The second edition for the fiscal year has been printed and sent out to clients.

## ONLINE PROMOTION

### *Online Promotion with Pinduoduo, November 2 – December 2, 2020*

ASMI China collaborated with group-buying platform Pinduoduo, similar to Groupon, for an online promotion from November 2 - December 2, 2020. Three online stores on the platform featured a variety of Alaska seafood, including cod, black cod, sea cucumber, yellowfin sole, pollock, and thorny head. The three online stores, Fishing Beauty (Meiyufang), Healthy World, and Dahuangxiansheng, are retailers that ASMI China has worked with in the past. As important players involved with Alaska seafood, this was a great opportunity to continue strengthening relationships and build on sales from last year. ASMI China’s efforts were rewarded with sales topping 50,680 kgs.

## China

### *Online Promotion with Kuailiantong, December 15 - 25, 2020*

Increasing visibility in the online space has been a goal for ASMI China during the past years as China has become more dependant on digital advertising, consumption, and entertainment, especially as coronavirus spread around the world. ASMI China worked with a new online platform Kuailiantong for the second time, featuring pollock, cod, and black cod from December 15 - 25, 2020. A banner ad was featured on their site and app to draw attention to the promotion. Online buying has been more popular in northern regions but has been gaining popularity throughout the south. As smartphone usage and online consumption continue growing, ASMI China will continue to work and promote Alaska seafood as much as possible through online channels.



### *Online Promotion with 3 Platforms in Hong Kong (Worldwide, eSea Click, Crazybird) December - January 2021*

This online promotion with Hong Kong platforms involved Worldwide and eSea Click promoting in December, and Crazybird for January 2021. This will be reported on in full in the third quarterly report.

### *WeChat Update, October - December 2020*

ASMI China made 12 weekly posts during the second quarter of FY 20/21. The posts covered general interest topics such as health, different recipes, and Chinese culture, appealing to a broad segment of China's audience.

## TRADE SEMINARS

1. Technical Seminar in Shenyang, December 2, 2020
2. Technical Seminar in Changchun, December 3, 2020
3. Technical Seminar in Hefei, December 11, 2020
4. Technical Seminar in Zhuhai, December 16, 2020
5. Technical Seminar in Kunming, December 17, 2020
6. Technical Seminar in Wenzhou, December 18, 2020



With help from ATP funding, ASMI China launched another round of trade gatherings, specifically aimed at developed Tier II and III cities to raise awareness of Alaska seafood, and focused on enhancing the technical knowledge of Alaska seafood through a technical seminar. This campaign helped strengthen collaboration with traders in new markets, which will prove beneficial in years to come and also saw ASMI China's first official visits to Zhuhai, Guangdong province, and Kunming, Yunan province.

For each event, at least 20 local key seafood accounts were invited, which included importers, wholesalers, retailers, and other key members. A presentation about Alaska seafood was given which dove into the details of key species, including pollock, cod, black cod, yellowfin sole, Pacific ocean perch, sea cucumber, and pollock/herring roe. Alaska seafood samples, which included pollock, cod, black cod, sea cucumber, Pacific ocean perch, and roe, in retail/wholesale form, were shared at each event, allowing attendees to gain a better understanding of its quality, texture, and more. A chef demonstration was also conducted in certain cities, generating interest from the guests who were able to learn about preparation tips. A set of Alaska seafood POS materials were provided to guests. It is believed the trade gatherings will strengthen relationships even more with ASMI China and help expose local communities to more Alaska seafood.



### OFFLINE-TO-ONLINE PRODUCT SHOWCASE PROMOTION

*O2O Promotion with CR Vanguard, December 24 - January 7, 2021*

For this promotion, ASMI China partnered with 11 supermarkets under CR Vanguard, including Ole' and Bt from December 24 to January 7, 2021, wanting to target end-of-the-year buying. The promotion featured pollock, black cod, and sea cucumber, at stores located in areas surrounding Beijing, which featured promoters. At the same time, an online ad for Alaska seafood was also created and featured on a third-party home delivery service, Jingdong Home Delivery, servicing the participating supermarkets. Through the service, online shoppers living within range could have their groceries delivered in under an hour.

ASMI China paired the offline/online retail with social media, hiring KOL, "Four Seasons Barbie" for a live-stream event broadcast on Yizhibo, as well as adding 20 pieces of press coverage. Barbie has cooperated with ASMI China and attracted over four million audience views on the second day of the event, preparing dishes that featured pollock, black cod, and sea cucumber. The press coverage covered 20 platforms from popular Internet portals Sina, Tencent, and also shopping sites and news portals. Together, the online and offline platforms helped drive different segments of consumers to one another and increase the effects of the promotion, while KOL and press coverage boosted visibility.



### WHOLESALE MARKET PROMOTION

The promotion with wholesale markets in Shanghai and Guangzhou provided an opportunity to touch base with clients, gain feedback about the market, and boost Alaska seafood visuals.

There was a great deal of sensitivity toward frozen imported goods, the result of government directives and media reports about repeated incidences of the coronavirus being tied to frozen food packaging. In general, companies did not want to

“actively promote” any frozen goods as deemed harmful by officials or other management agencies, who conduct various inspections and disinfections to actively monitor the situation. Product arrivals were closely tracked as were all sales.

Sales for the companies during the past months have dropped because of the avoidance of frozen goods by other businesses, the HRI sector, and consumers. There have also been greater requirements for paperwork, various certificates detailing product origin, sanitation, and disinfection, as well as nucleic acid testing. The companies do not wish to rock the boat and hope that this period will pass. Many of the larger, financially sound companies are still confident in the market and plan to stay. Some of the smaller, newer companies have decided to work with other industries. While there are sure to be emerging shocks for the short term, the long-term story for safe, high-quality seafood in China remains unchanged.

### Shanghai Jiangyang Aquatic Products Wholesale Market

This market was completed in 2008, and part of the Jiangyang Agricultural Products Market. In total, there are more than 3,000 shops and currently the largest aquatic products market in Shanghai. The market offers a diverse selection of seafood, including king crab from different countries, including Alaska, Russia, Australian and Canadian lobster, a variety of oysters, many different types of shrimp and other shellfish, as well as dried and frozen goods.

### Guangzhou Haihe International Aquatic Products Market

Guangzhou Haihe International Aquatic Products Market was established in 2010 and covers an area of 140,000 square meters, with two 6,000 ton refrigerators and more than 300 shops. The shops are equipped with 10-ton refrigerators, serving domestic frozen seafood and meat. At present, there are more than 400 companies in the market.

All frozen products in Guangzhou are being managed using a “mini-program-related app” to track cold-chain logistics. All companies have been required to upload their existing inventories to the system, and have all subsequent movement of products tracked. As of January 4, 2021, no new products were allowed to enter the system.

For any new products to enter, they will have to be routed to and through the frozen products “Regulatory Warehouse” designated by the government. All imported products in the original packing boxes should be placed and stored according to direction by the government officials managing the warehouse.

Overall business levels have fallen, along with foot traffic. Prices of frozen domestic products have started rising and frozen imported products have been less desired. Alaska seafood products found at the market included cod, black cod, and Pacific ocean perch. Businesses will not be able to import any new products and will look to sell everything in their inventory first.

## FOODSERVICE PROMOTIONS

### *Menu Promotion at Taylor Shellfish in Hong Kong (2 stores), October 12 – November 12, 2020*

ASMI China concluded a menu promotion in the small, but important market of Hong Kong, with Taylor Shellfish. The city is well known for its culinary landscape, and residents with strong purchasing power. From October 12 - November 12, 2020, at two of its Taylor Shellfish Farm oyster bars, Alaska king crab legs and black cod were offered as part of a special menu to entice residents back to restaurants during the coronavirus business downturn. Dishes included King Crab legs, a King Crab Salad, Fried Black Cod & Chips, and Baked Black Cod. A range of POS materials was used to decorate the dining area, and a custom menu and promotional ice buckets were created. An ad was also placed on Openrice, one of the most popular dining Apps used by locals







*Menu Promotion at Pullman Wenzhou in Wenzhou, November 6 - December 6, 2020*

ASMI China sought out the Pullman Wenzhou Hotel for a menu promotion from November 6 - December 6, 2020. This was the second time collaborating, both sides eager to replicate the success seen in the previous year. The products featured included black cod, pollock, pollock roe, and yellowfin sole. Additionally, dining mats and plenty of eye-catching visuals decorated the dining and buffet areas to enhance the mood. The depictions of Alaska’s scenic environment and fishing industry complemented the promotion well. The five-star hotel shared positive feedback about the dishes and was optimistic about future collaborations.



**CHEF SEMINARS**

*Chef Training Seminar in Dalian, October 27, 2020 & Shenzhen, October 29, 2020*

A chef training seminar was held in both the Shangri-La Hotel Dalian on October 27, 2020, as well as the Shangri-La Shenzhen, October 29, 2020. Fifty-five and sixty guests attended respectively, which included local area chefs and local purchasing staff from hotels and restaurants. They were separated into two groups, with one group focused on Western cuisine and the other on Japanese cuisine. Offering an additional cuisine option appealed to more chefs and more accurately reflected the diverse dining landscape in China. The chefs listened to some remarks about Alaska seafood before the executive chef provided cooking demonstrations of Alaska pollock, yellowfin sole, black cod, snow crab, pollock roe, and sea cucumber. Afterward, all of the chefs were able to gather and taste all of the creations and share feedback with everyone.



## TRAINING SCHOOL PROGRAM

### *Chef Training School Program at Omick in Shenyang, November 2 - 6, 2020*

A chef training school promotion was held in China's northeast city of Shenyang, Liaoning province from November 2 - 6, 2020 with Omick, a professional talent education institution focused on Western cuisine in China, part of the famous Xinhua Education Group. With the overall growth of restaurants in the nation, targeting future chefs will be a key driver for growth. Over 300 students attended classroom lectures about Alaska and its environment and learned about different species and their characteristics. They also spent plenty of hours in the kitchen working with the featured Alaska seafood ingredients cod, pollock, and yellowfin sole, practicing a range of knife skills, storage, and cooking techniques. By continuing to educate future chefs about Alaska seafood, ASMI China can further promote brand and product awareness.



### *Chef Training School Program at Guangdong Trade Vocational-Technical School, November 30 - December 4, 2020*

ASMI China worked with Guangdong Trade Vocational-Technical School to hold a training school program targeting the southern China region during the quarter. As developing cities in China continue to grow and modernize, there will be growing demand for chefs fulfilling HRI needs as people spend more time working. Exposing chefs to Alaska seafood and educating them will be a great step in driving increased usage in the industry. More than 250 chefs took part in the promotion which featured both classroom lectures on Alaska seafood and hands-on kitchen time to work with pollock and yellowfin sole. Each student also received a set of Alaska seafood materials, including fact sheets and buyer guides, for reference and long-term usage.



### JAPAN

#### MARKET UPDATE

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According to the Cabinet Office's monthly economic report for December, the Japanese economy is still in a difficult situation due to the effects of the COVID-19 outbreak. Still, it is showing some signs of picking up.

- Private consumption is picking up as a whole, though weakness can be seen in some sectors;
- Business investment has been decreasing recently;
- Exports are increasing;
- Industrial production is picking up;
- Corporate profits have decreased substantially due to the infectious disease's influence, but the rate of decline is becoming smaller. Firms' judgments show some signs of improvement, although some severe aspects remain;
- The employment situation shows steady movement in some areas, such as the number of employees. However, weakness remains in other areas due to the influence of the infectious disease;
- Consumer prices are flat.

The situation going into 2021 remains uncertain due to the sharp increase in positive COVID-19 cases that arrived at the end of 2020.

#### COVID-19 situation in Japan:

(as of 14th Jan 2021)

- Total PCR confirmed cases 310,708
- Total active cases 68,918
- Total deaths 4,341

In response to the increase of positive COVID-19 cases in December, the Japanese government declared a state of emergency for 11 prefectures. The declaration is likely to remain in effect for around a month and requests restaurants and bars close at 8 pm. It also expands financial support to those that comply with the request. The deceleration imposed no restrictions for retailers, especially grocery stores, but some voluntarily shortened their operating hours. All schools in the region will remain open. People in the designated regions were instructed not to go out after 8:00 pm for nonessential and nonurgent purposes. The declaration requested that all enterprises and firms reduce the number of at-site/in-office workers by 70%. Vaccine inoculation programs will likely not begin until late February.

#### Seafood Market:

##### *Seafood supply*

According to the Ministry of Finance's trade statistics, the volume of seafood imported into Japan in November 2020 was 192,326 tons, a decrease of 9% from November 2019. The value of imports was JPY 130.9 billion (US\$ 1.2 billion), a decrease of 11% from November of the previous year. The 2020 import totals are likely to fall below the 2.47 million tons imported in 2019.

The cumulative total volume of imported frozen salmon from November 2020 was 134,413 tons (vs. 132,494 YoY). Still, the import volume of frozen sockeye salmon from U.S./Canada/Russia increased to 23,521 tons (vs. 20,152 tons YoY). The cumulative total frozen surimi import volume as of November decreased to 173,878 tons (vs. 220,399 tons YoY), and that of Alaska pollock surimi decreased to 73,354 tons (vs. 100,014 tons YoY). Imports of rockfish and black cod have been exceeding those of the previous year.

The seafood supply from domestic fisheries has been at a historically low level. The cumulative total harvest of chum salmon was 52,120 tons as of November (a 3% decrease compared to 2019, when the annual chum harvest hit its lowest record). 2020 total harvest of pacific saury was 29,566 tons (27% decrease YoY).

Seafood consumption

Seafood sales in Japanese supermarkets have been strong. In the monthly sales statistics issued by the National Supermarket Association of Japan, representing 1,250 retail companies and their 10,000 supermarket stores, October seafood sales increased by 8.7%. The total household expenditure survey for October showed a slight increase (1.9% YoY), and the expenditures for retail seafood items increased by 2.7% YoY, including the salted and dried seafood sector (4.4% increase) and surimi seafood sector (0.6% increase) where Alaska Seafood items are vital ingredients.

The foodservice situation decelerated again in November after its recovery from the 1st and 2nd waves of COVID-19, with overall revenues at 94.3% YoY in October and 92.2% in November. An important sector for seafood consumption, the takeout rice & conveyor-belt sushi sector showed a rapid recovery to 95.9% YoY in October and 99.8% YoY in November. The Pub & Izakaya category and dinner restaurant category have been in a difficult situation.

ACTIVITY UPDATE

CONSUMER PUBLIC RELATIONS

Monthly Out-Of-Pocket Expenses (Q2)

ASMI Japan has conducted the following activities related to this activity line:

- Media monitoring and clippings:
  - ✓ Online and print media daily
- Press release distribution:
  - ✓ Social Media Campaign for Kanikama surimi crab leg
  - ✓ The promotional event at Antenna America (Craft beer tie-up)
  - ✓ Mentaiko Pollock Roe Gifting Promotion
  - ✓ Participation in Tokyo Sustainable Seafood Symposium (TSSS)
  - ✓ Promotional activity with COOP Tohoku
  - ✓ Herring Roe Promotion with ItoYokado
- Others:
  - ✓ Sending year-end gifts to KOLs
  - ✓ Meeting and research for upcoming activities



Social Media Support for Mentaiko Gift Promotion

The outline of this activity is as below:

Objectives:

- To support the Mentaiko Pollock roe promotional campaign with Otoriyose Net, a gift guide website, by arranging Instagram posts by influencers.

Outline:

- Period: November 10 – December 28, 2020
- Contents: Arranged five influencers who are already fans of mentaiko pollock roe or gifting food to introduce the campaign in their Instagram posts

Post contents:

- Hashtag ASMI Japan and Otoriyose Net
- Key messages:
  - Mentaiko from Alaska Pollock roe
  - Mentaiko for rice



## Japan

- Hashtag
  - From Alaska
  - Sustainable
  - Mentaiko Pollock roe
  - Gift, etc.

### Result:

- Reached 203,989\* through the posts by five influencers (\*total no. of their followers)
- No. of likes: 5,744 in total



## CONSUMER PROMOTIONS

### SNS Experience Contents Creation

The outline of this activity is as below:

#### Objectives:

- To enrich social media content
- To raise relevancy through sharing staffs' personal experience with Alaska seafood
- To utilize the experience for the marketing activities internally

#### Contents:

- ASMI Japan staff selects Alaska seafood that matches the season and introduces them by cooking and eating.
- Use a hashtag "Alaska Seafood Report" to differentiate the posts from others

#### Calendar:

1. Herring Roe on Kelp (Aug 6)
2. Kanikama (September 10)
3. Marinated Black Cod (September 16)
4. Atka Mackerel (September 23)
5. Mentaiko Pollock Roe (October 7)
6. Sujiko Salmon Roe (Oct 14)
7. Chikuwa Pollock Surimi (October 26)
8. Marinated Sockeye Salmon (November 11)
9. Herring Roe (December 25)



### Social Media Campaign B for Kanikama Crab Leg Surimi

The outline of this activity is as below:

#### Objectives:

- To raise interest and inspire purchases of Alaska seafood, specifically Kanikama (surimi crab leg), among general consumers.

#### Outline:

- Name: Kanikama (surimi crab leg) campaign for parents and children
- Period: October 28 - November 8, 2020
- How to join:
  - Follow the ASMI Japan IG account
  - Post a Kanikama recipe with tag and hashtags

- ◇ @ALASKASEAFOODJAPAN
- ◇ #Kanikama for parents and children
- ◇ #Kanikama
- ◇ Winners: 10 participants won a one-year supply of Kanikama
  - ✓ 400g is the average annual consumption of Kanikama in Japan
  - ✓ Approx. 2,000g will be sent as a prize to 10 winners
  - ✓ In three separate shipments, Nov 2020, Jan and Mar 2021
  - ✓ two types of products, six in total



Result:

- Reached 336,000\* through the posts by eight influencers (\*total no. of followers)
- No. of participants: 375 in total
- No. of followers gained through this campaign: 93
- Gained ten organic posts by the winners (Total no. of followers: 9,670)

RETAIL MERCHANDISING

Alaska Seafood Fair at Coop Sapporo

Hokkaido prefecture is traditionally one of the most critical consumption areas for various North Pacific seafood products. People in the region are familiar with their local resources such as salmon, crab, herring, pollock, and cod, which are now, unfortunately, experiencing low stock levels. Consumers Cooperative Sapporo, "Coop Sapporo," is a retail Coop that covers Hokkaido's entire island. 57% of Hokkaido households are Coop union members, totaling approximately 1.54 million people, making it the most significant single regional Cooperative in Japan.

Coop Sapporo conducted Alaska Seafood Fairs for sockeye salmon, sujiko (sockeye salmon roe), black cod, rockfish, Atka mackerel, surimi product, Alaska pollock roe (tarako and mentaiko) at over 100 Coop Sapporo stores in October, as well as through their home-delivery retail platform (online and catalog orders) "Todok" in October. Todok means "delivered" in Japanese.

ASMI Japan supported the fair by:

- Providing POS materials with Alaska Seafood logos (posters, sign cards, postcards, and stickers) for retail outlets.

- Securing PR spaces for Alaska seafood in the "Todok" weekly catalogs four times during October.

- Placing a five-page advertorial in the October edition of Coop Sapporo's free monthly PR magazine "Cho-co-to" (circulation 570,000) to tell readers the Alaska Seafood story with a focus on sujiko salmon roe, to offer recipes for various Alaska items, and to provide the details of the Alaska Seafood Fair.

- Supporting a campaign throughout the fair period. (Campaign scheme) Consumers who buy JPY1000+ (approx. USD 10) worth of Alaska Seafood Fair items were eligible to enter a prize lottery. One hundred sixty people can win Alaska Seafood products from both retail outlets and e-commerce/home delivery platform "Todok."





Results: Total sales value was JPY 174, 954,381 (US\$ 1,682,370).

(Breakdown) In-store: JPY 157,794,381 (US\$ 1,517,358)

No. packs sold (in-store): 457,798

Home Delivery: JPY 17,160,000 (US\$ 165,012)

No. packs sold (home delivery): 28,521

*Collaboration with OISIX Group*

ASMI Japan conducted an Alaska seafood promotion with Oisix ra Daichi, an online food supermarket founded in 2000 (<https://www.oisixradaichi.co.jp/>). After two mergers of midsize online/catalog retailers (Daichi wo Mamru kai and Radish Boya), Oisix has become one of the largest Japanese online/catalog retailers for organic vegetables, additive-free processed foods, and other food products and ingredients with particular emphasis on food safety. Oisix ra Daichi revenues in FY2019 were JPY71,040 million (US\$664 million) and continue to grow each year.



ASMI Japan considers the customers of Oisix ra Daichi a match with our ideal target market – people who are willing to pay higher prices to meet their demands for food safety and quality. Also, products are delivered to Japanese consumers at home nationwide so ASMI can reach customers throughout Japan.

ASMI Japan supported promotional activities for Alaska seafood items, including Alaska pollock fillet (minced), herring roe, Pacific cod, black cod, sockeye salmon, and Atka mackerel. ASMI Japan partially supported the costs of developing and maintaining the Alaska seafood tie-up page on the online store and their brand-new magazine called Farble, which was delivered to the customers.

- The Alaska seafood brand stores page was launched to tell the unique attributes of Alaska Seafood.
- Alaska pollock minced fillet, herring roe, Pacific cod, black cod, sockeye salmon, and Atka mackerel were sold through the special tie-up pages during September/October 2020
- Mail magazines were sent to Oisix group users to announce the Alaska Seafood promotion

The magazine Farble included a two-page Alaska seafood page, delivering critical messages to Oisix group customers (approximately 340,000 active users).

Result: Total sales value was approximately JPY 6,300,000 (US\$ 61,165)

Circulation of print magazine: 350,000 Oisix Group members

Link to Oisix Da Raichi on corporate site– Farble Issue No. 2 – September 2020 (p8/9)

[https://www.oisixradaichi.co.jp/company/withord/farble/pdf/Farble\\_vol02.pdf](https://www.oisixradaichi.co.jp/company/withord/farble/pdf/Farble_vol02.pdf)

### *E-Commerce collaboration, Tie-up with "Otoriyose net"*

ASMI Japan promoted Alaska origin mentaiko pollock roe through a tie-up promotion page in one of the biggest scale portal sites specialized in gourmet products. The tie-up partner, Otoriyose Net, is a portal site where people can find something special for themselves or their family and friends - <https://www.otoriyose.net/> The site also offers gourmet information trends, reviews by foodies, food professionals, and Otoriyose lovers, and shopping sites for each food item.

Site details: Monthly PV average 3.7 million, and the total number of annual users (May 2019 - April 2020) was around 6.2 million. The number of mail magazine members is 65K.

As branding of Alaska origin pollock roe products is a central ASMI theme, the tie-up page featured mentaiko products made with Alaska origin pollock roe. The page introduced the attributes of mentaiko and Alaska pollock roe and why it's unique.

Projected outcomes for this activity were as follows:

1. Reach a broader foodie audience for branding of gift grade mentaiko made from Alaska origin pollock roe
2. Provide an incentive to develop pure "Alaska origin" mentaiko among mentaiko manufacturers

The tie-up page introduced Alaska origin mentaiko's attributes and led visitors to each shopping site where Alaska origin mentaiko merchandise was available. The ASMI Japan team invited participant processors through trade newspapers and the Mentaiko Processors Association.

The tie-up page lasted for six weeks, from November 10 to December 28, 2020.

### *Coop Tohoku, Alaska Seafood Fair*

The Tohoku region of Northeast Japan has traditionally been one of the most critical consumption areas for Alaska seafood products. Consumers Cooperative Tohoku (Coop Tohoku Sunnet Federation) consists of nine single Consumers' Cooperatives in six prefectures in Northeast Japan with 103 stores. They have around 1.83 million consumer members.

ASMI Japan supported an Alaska Seafood Fair at Coop Tohoku from November 19 to December 16, 2020, to boost Alaska seafood sales, promoting sockeye salmon, sujiko (sockeye salmon roe), and Pacific cod, with the other regular Alaska seafood items. ASMI Japan sent POS materials featuring the essential Alaska Seafood products to all stores of Coop Tohoku.

As part of the fair, ASMI Japan supported an "Alaska Seafood Prize Campaign" in which consumers who buy Alaska Seafood Fair items worth more than JPY 500 (USD 4.40) during the fair period were entered in a lottery for the chance to win an "Alaska Seafood ticket," which the winners could use to buy Alaska Seafood in Coop Tohoku stores. Five hundred consumers received the JPY 1,000 (USD 10) Alaska Seafood ticket.





*Sogo Seibu Winter Gift 2020*

Background: There are two traditional gift-giving seasons in Japan. "Ochugen" gifts are given in summer, and "Oseibo" gifts are given in winter and usually consist of premium quality food and beverages. The gift market has been shrinking due to several factors, including population decline and culture changes. However, there is still stable demand for premium quality seafood to buy as a special gift. These are the critical markets for higher-grade Alaska seafood raw materials. ASMI Japan re-developed the local Japanese gift market with retail stores to gain new opportunities for Alaska seafood items and to add exceptional value to the products made with Alaska seafood.



ASMI Japan placed an Alaska Seafood advertorial in Seibu Department Store's winter 2020/21 Gift Catalogue to promote the range of Alaska seafood items listed in the catalog as gift items. The department store produced and distributed 600,000 copies of the catalog, delivered directly to consumers' homes. Consumers could order items by mail as well as online.

The advertorial featured an endorsement of Alaska Seafood from Yushima-Maruaka, whose products are considered premium and suitable for unique gifts.

<https://maruaka.co.jp/>

ASMI Japan promoted Alaska seafood as 100% wild, natural & sustainable, and an ideal ingredient for making Japanese food on the Seibu Department Store website. Also, the Alaska seafood products listed in the catalog clearly state the Alaska origin.

*Tokyo Sustainable Seafood Symposium 2020*

The Tokyo Sustainable Seafood Symposium is one of the biggest events of Japan's sustainable seafood sector. The 6th symposium was held for six days on November 4 to 6th and 9th to 11th, 2020. Due to the COVID 2019 pandemic, the symposium was run online. Management executives, decision-makers, CSR managers, and investors in the seafood, retail, and food industries attended the symposium. ASMI Japan was invited to be a sponsor of the Tokyo Sustainable Seafood Symposium 2020 and provided the content partnership package below:

- ASMI logo displayed on TSSS 2020 official website



## Japan

- A 25 min dialogue session to introduce the jointly organized promotions between ASMI & Sogo-Seibu Department store of 7 & I group
- ASMI video (1 minute) displayed on the official website for six days

Official website: <https://sustainableseafoodnow.com/2020/en/>  
<https://vimeo.com/479901204/0a24732491>

### *Herring Roe Promotion at Ito Yokado for New Year demand*

Alaska origin kazunoko herring roe from December 17 to 31st 2020 and increase Alaska's awareness as a reliable source for herring. Ito Yokado is one of the most influential Japanese supermarkets of 7 & I group with 127 outlets throughout Japan. <https://www.itoyokado.co.jp/special/global/en/>



ASMI Japan supported the promotion by producing special herring roe booklets in collaboration with Nichimo, a herring roe supplier. The booklet includes information about herring roe and recipes. ASMI Japan also provided POS materials to the main Ito Yokado outlets, including the flagship stores.

## TRADE PUBLIC RELATIONS AND ADVERTISING

### *ASMI Japan Trade News Letter production/distribution*

ASMI Japan produced a trade E-newsletter and sent it to the significant Japanese trade companies, including importers, seafood processors, market wholesalers, distributors, retailers, foodservice representatives, and trade media. It was also posted on the ASMI trade website (<https://japanese.alaskaseafood.org/>).

Contents included updates on ASMI Japan's activities, including both trade and consumer-facing activities, seasonal news about Alaska, and marketing updates about ASMI programs in other regions. It is distributed regularly (at least bi-monthly, six times per year). The second newsletter was distributed on November 10, 2020.

### *Sustainability ads in Suisan Times*

ASMI Japan placed an advertisement in major seafood industry publications Suisan Times.

Suisan Times 65th anniversary "Sustainability issue" on August 18, 2020

Contents: 65th anniversary interviews (The chairman of MEL and several representatives from seafood industries), the sustainable seafood strategy from several companies and organizations, the latest trend for various ECO labels and so forth)

Ad size 1/4 page in color

ASMI Japan plans to have sustainable comments from Susan/ASMI and RFM comments from CSC to translate into Japanese and create articles.



### *Alaska Pollock Surimi Ads on Minato Shimbun*

ASMI Japan placed an advertisement in one of the major seafood industry publications, Minato Shimbun.

Minato Shimbun released a special surimi and surimi seafood poster on November 25, 2020.

Contents: Data about surimi and surimi seafood production in Japan and in global markets.

Ad size: 37 mm x 127 mm in color

Minato Shimbun introduced ASMI's promotional opportunities for Alaska Pollock Surimi products.



*Trade ads on Suisan Timesa and Minato Shimbun*

ASMI Japan placed advertisements in major seafood industry publications Suisan Times and Minato Shimbun.

Suisan Times released a special mentaiko (spicy marinated pollock roe) edition on December 7, 2020.

Contents: Introduction of various mentaiko roe products, manufacturers' sales policy and outlook, the Mentaiko Association's movement and the future prospective

Ad size: 37 mm x 127 mm in black & white

Minato Shimbun released an SDGs and sustainable issue on December 10, 2020

Contents: Introduction of each company's activities related to SDGs, interview with the companies focusing on SDGs, and the outlook for SDG friendly companies

Ad size: 1/8 page in color



**WEBSITE DEVELOPMENT AND MAINTENANCE (CONSUMER)**

*Website update and maintenance (Q2)*

The content of activity are as below:

Update for Q2

1. News page <https://japanese.wildalaskaseafood.com/news/>

- October 27: Announcement SNS Kanikama Campaign
- November 6: Announcement of the tie-in promotional activity with an American Craft Beer restaurant (Antenna America)
- November 9: Announcement of the tie-in recipe video with a culinary expert, Mr. Koh Kentetsu's official YouTube
- November 11: Announcement of the Mentaiko Gifting Promotion
- November 15: Announcement of participation to Tokyo Sustainable Seafood Symposium
- November 20: Announcement of the promotional activity with COOP Tohoku
- December 16: Announcement of the Recipe page update

2. Recipe page <https://japanese.wildalaskaseafood.com/recipes/>

Recipes by Ms. Kurihara (8 recipes)

- Grilled Atka Mackerel with Cheese <https://japanese.wildalaskaseafood.com/etc/1096/>
- Rice Seasoned with Atka Mackerel <https://japanese.wildalaskaseafood.com/recipes/1082/>

- Black Cod Omlette <https://japanese.wildalaskaseafood.com/recipes/1090/>
- Black Cod Lemon Cream Pasta <https://japanese.wildalaskaseafood.com/recipes/1091/>
- Pacific Cod Soy Milk Soup <https://japanese.wildalaskaseafood.com/recipes/1095/>
- Mentaiko Pollock Roe Butter <https://japanese.wildalaskaseafood.com/recipes/1092/>
- Boiled Potato with Powdery Surface Dressed with Mentaiko Pollock Roe <https://japanese.wildalaskaseafood.com/recipes/1093/>
- Mentaiko Pollock Roe Pickled in Japanese Soup Stock with Sansho Japanese Pepper <https://japanese.wildalaskaseafood.com/recipes/1094/>

**WEBSITE DEVELOPMENT AND MAINTENANCE (TRADE)**

*Website maintenance for the first half of FY21*

ASMI Japan maintains ASMI Japanese B2B website by updating it with the latest information and resources on Alaska seafood. Target audience for the website includes seafood industries trade, retail and foodservice representatives as well as media and general consumers.

ASMI Japan is managing the relevant sections of the website, updating the site with Alaska seafood point-of-sales materials, managing the RFM site including the introduction and overview of RFM, Seal guidelines, and Chain of Custody (CoC) information. In addition, the website features the latest information including updated trade news for the seafood industry trade, press releases for the media, announcements of upcoming promotional events and campaigns. ASMI Japan will also respond to any problems on the website.

ASMI Japan B2B website: <http://japanese.alaskaseafood.org/>

Update for Q2

1. News page <https://japanese.alaskaseafood.org/news/>
  - October 5, 2020: Corona Virus update
  - November 10, 2020: Second Newsletter
  - November 30, 2020: TSSS
2. POS materials <https://japanese.alaskaseafood.org/promotion-tool/>
  - Wild Alaska seafood stickers with QR code
  - Black cod stickers with QR code
3. Sustainable video on the top page <https://japanese.alaskaseafood.org/>

**FOODSERVICE PROMOTIONS**

*Alaska Seafood Experience at "Antenna America"*

ASMI Japan supported the tie-up promotion "Alaska Seafood Experience" at US craft beer importer Nagano Trading's Antenna America brewery at three outlets in Yokohama, Kannai and Shinagawa. <https://www.antenna-america.com/>  
The Antenna America bars served varieties of American craft beer to consume on-site and also offered American craft beer for purchase.

The tie-up promotion "Alaska Seafood Experience" started on November 7 2020 and lasted for one month, offering four recipes of Alaska origin Atka mackerel and Pacific cod in each outlet: Smoked Hokke (Atka Mackerel) Jambalaya, Pacific Cod Tacos, Crispy beer battered Pacific Cod BLT sandwich, and Pacific Cod & Hokke (Atka Mackerel) Chowder.



## Japan

ASMI Japan provided POS materials - table tents and menu cards with key messages about Alaska seafood, Atka mackerel and Pacific cod, and supported recipe development. In addition, Alaska seafood informational booklets/leaflets were provided for customers. ASMI Japan distributed a press release about this tie-up promotion to reach broader consumers through consumer-facing media & trade facing media, to offer the Atka Mackerel/Pacific Cod & beverage pairing opportunity.



## WESTERN EU (FRANCE, BELGIUM)

### MARKET UPDATE

The past three months were dominated by the second wave of COVID-19 hitting the EU and Western European markets in particular. With infections on the rise, Belgium faced the threat of hospitals reaching their limits and the collapse of the medical sector. France also recorded a quick spread of the pandemic making new, strict measures inevitable. That led to a new lockdown in both markets including closures of restaurants and a standstill of public life which of course also affected the ASMI program. Much of the traditional in-store promotions that had been postponed in spring were planned to happen in fall as hopes were up that that last quarter of the year would be easier to manage. However, as a second wave was also expected, for most events, virtual alternatives were prepared to take place in case supermarkets prohibited in-store activities. Additionally, ASMI planned several digital promotions to react to the market situation and be able to keep the program running.

WEU markets were of course also affected by Brexit, especially France since it had a leading role in the final discussions. As the impact of reduced quotas and limited fishing rights in the waters of the British islands for EU vessels would impact French fisheries the most, the country was driving negotiations to find a solution. Even if the quotas were reduced by 50% within the next six years for European fishermen, it can still be seen as a positive solution that will secure sufficient volume for a majority of the French industry. While not directly impacting Alaska seafood, parties needed to reach a compromise, as a breakdown of the domestic fishery would also affect the processing and logistic sector and therefore imported volumes, too. The reduction of domestic volume in the near future might even result in a higher demand for foreign produce as fish consumption remains high.

The trade dispute between the US and the EU continues to undermine trade flow and since fall 2020, Alaska seafood products are directly affected for the first time with new penalty tariffs for certain Pacific salmon items. However, as the majority of the industry imports different raw materials, most traders reported to not be affected by the new restrictions. Nevertheless, even if there are only a few that face a 25% increase in customs duties for their imported raw materials, that could still have a negative impact on imports. Therefore, there are hopes that with the new US government,

Washington and Brussels will find a way to solve this conflict soon to prevent any long-term damage to existing trade relations.

### ACTIVITY UPDATE

#### CONSUMER PUBLIC RELATIONS

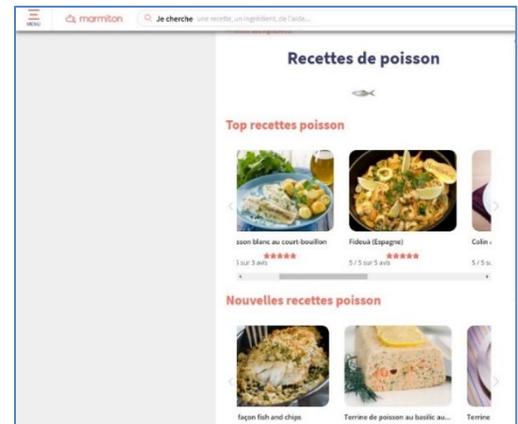
##### *Blogger Cooperation*

Following the approach to turn a large part of the ASMI activities into online promotions, new relations with key opinion leaders and influencers in WEU markets were established. A collaboration took place before Christmas to inspire consumers to choose Alaska seafood for the holidays. The collaboration was with the popular blog Hervé Cuisine. He is a professional chef and blogger who has 525,000 followers on Instagram and 1,101,627 followers on Facebook. In the scope of the partnership, a live cooking session took place for his community during which he explained the beneficial qualities of the origin of Alaska as a trustworthy source of sustainable seafood. Afterward, he presented the different products available in French supermarkets and how to identify them in the stores. The session ended with him preparing a dish highlighting Pacific cod as the centerpiece of the plate.



##### *Marmiton Publication*

To address consumers when planning their shopping, ASMI started a new promotion in the shopping app Bring!. To further boost the impact on customers and influence their purchasing decisions, a partnership with the popular recipe database and food information network Marmiton was organized. The goal was to put the Alaska message in the spotlight and explain to consumers why choosing Alaska is the right choice when buying seafood. A long article was published to inform about Alaska and its species and linking them to culinary inspiration in the form of recipes. Preparation tips were also included to overcome the constraints of consumers that are not comfortable with cooking fish and frozen fish at home.



#### TRADE PUBLIC RELATIONS AND ADVERTISING

Publications were continuously placed in selected trade and HRI media in France including PdM, Points de Vente, LSA, Intrafish, and Eurofish. Being represented in these magazines is an important way to stay visible and on the radar of industry members reaching a large audience of professionals in Western EU markets.

#### TRADE SHOWS

As one of the first trade shows in Europe, SIRHA in France announced that the show is postponed to the end of May / early June 2021. While it is not completely sure that the event will take place as planned, ASMI decided to team up with Food Export Northeast Seafood for a combined booth space at the show. The partnership helps to reduce the financial risk while at the same time increases the value of the exhibition and will help draw further attention to the stand. A first draft for a booth layout was developed by GL Events.

#### RETAIL MECHANDISING

In cooperation with the seafood trader Labeyrie, in-store promotions at different supermarket chains such as Carrefour, Auchan, or Leclerc were conducted in France and Belgium. These were originally scheduled for spring 2020, but due to

## Western EU

the pandemic and the resulting lockdown, the promotions were postponed to fall. Luckily, the projects ran in the brief period between the first and the second lockdown which was the reason why in-store activities were possible. Through sampling and information counters within the stores, customers were addressed to try and learn about Alaska seafood and add it to their shopping basket. In total, the promotion took place for 130 days in the two countries. The focus was on smoked wild Alaska salmon.

Finalizing the cooperation with Delpierre, the remaining 49 days of in-store promotion took place in early October. The program was cancelled in spring, so ASMI came to the agreement that promotions will start again as soon as the situation allows. The products featured were different pollock, salmon, and cod items promoted at stores of the French supermarkets Super U, Auchan, Géant, Leclerc and Carrefour.

In December, the Bring! shopping app campaign started to boost sales of Alaska wild salmon during the holidays. In January, it will switch to surimi as a healthy snack food for New Year's resolutions before it changes to Pacific cod in February.



## WEBSITE DEVELOPMENT AND MAINTENANCE

ASMI continues its work to increase the engagement and traffic as well as overall followers on its social media channels. This year, we will explore new platforms and work more closely with partners such as Bring! to improve our reach and impact. The website will receive an update to make it more user-friendly and better highlight some of the topics that are becoming more interesting to users including sustainability and transparency of the fishing methods in Alaska.

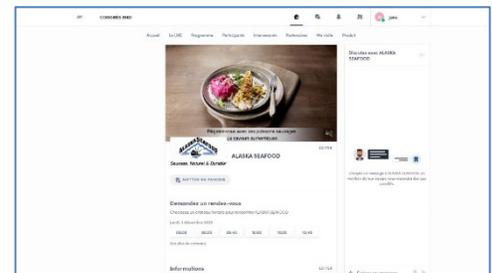
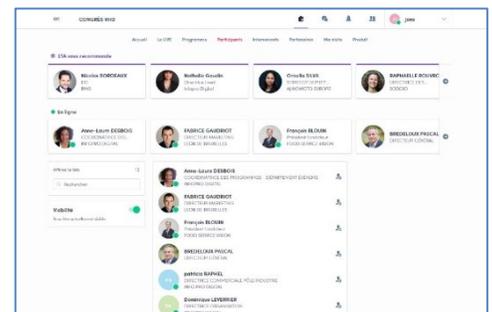
## FOODSERVICE PROMOTIONS

In the second quarter, France and Belgium were hit by a second wave of COVID-19 that led to a new lockdown and closures of restaurants. In light of these events, no foodservice promotions were conducted during the second quarter.

## HRI TRADE SHOWS

### *Virtual RHD Congress*

As real-life events are still not possible in WEU markets, ASMI worked with the leading trade media house Neo Restauration to participate in the online edition of the RHD Congress for the food trade and gastronomy industry. The event puts healthy living, sustainable sourcing, and eco-friendly resource-management in focus and addresses decision-makers of foodservice companies, restaurants, hotel groups, etc. to convince them of a more responsible way to work. ASMI was listed as a supporter of the congress with its own section showing materials such as videos, recipes, and imagery as well as providing information and brochures to download. Through a chat tool, visitors were able to reach out directly to speak to an ASMI team member during the live congress.

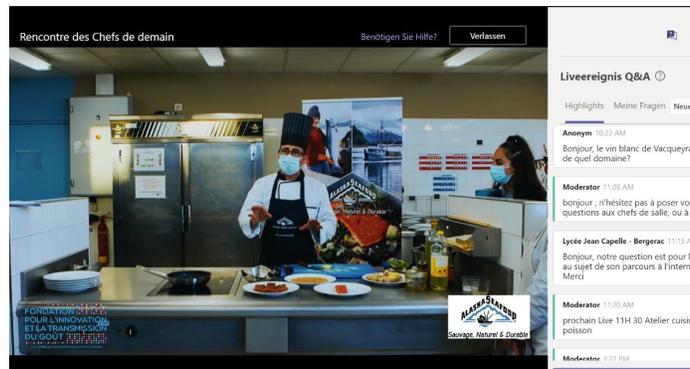


## CHEF EDUCATION

In partnership with Semain du Gout, ASMI ran education classes for students of gastronomy and hotel schools to inform them about Alaska and its seafood species. In these times, instead of running actual workshops in all schools, masterclasses took place with a small live audience of students that were screened to students across the country via Zoom. A professional chef explained the principle of the fishing industry in Alaska and the

quality characteristics of the products available in France covering cod, pollock, salmon, and flatfish. Talking to designated chefs and restaurant managers, the focus was on how to select and source the product and how to handle them in the kitchen.

Renewing the collaboration with Ethic Ocean and the Olivier Roellinger Competition for young chefs, ASMI supported the virtual edition of the contest. As every year, the focus was on sustainability and how to source and identify responsibly managed seafood as a chef. Alaska was part of all communication shared with the contestants and the public and also part of the jury for the finals. With a high reputation among gastronomists, the contest is an ideal platform to present Alaska as the top origin for sustainable seafood for professionals.



## CENTRAL EU (GERMANY, AUSTRIA, SWITZERLAND, CZECH REPUBLIC, AND POLAND)

### MARKET UPDATE

The past quarter was challenging for Alaska seafood in the CEU region due to multiple causes. First and foremost, the second wave of the COVID-19 pandemic hit the continent hard and forced most countries into a second lockdown that is still ongoing, leading to new closures of gastronomies and foodservice outlets. The long-term effects on the economy, private household spending and external trading are impossible to forecast, but it can be expected that especially in the HRI sector massive losses and business bankruptcies will impact the food market. On the other hand, latest numbers confirm that the food retail sector in Europe recorded the strongest year in history with sales up by double digits. That can also significantly affect the market as retail groups are able to invest in new logistic and future-oriented technology. It is expected that the past year will boost the digitalization of food retail in Europe. This is important to note when developing marketing strategies for a new product entry, as campaigns and programs need to be adjusted to the changing market to successfully address consumers new purchasing habits.

Another challenge ASMI faced in the past quarter was the new penalty tariffs on certain Pacific salmon products. These additional costs will significantly impact the market as profit margins are already tight and US produce will see a considerable cost increase, which could push competitive origins. However, as some of the key products for processors are not affected, the industry, including larger smokers and manufacturers, can continue its work and report no concerns regarding supply. Nevertheless, even if most of the leading players do not feel the pressure of the new tariffs, they still affect the overall market. Hopes remain high that the trade dispute will be solved within the upcoming year.

As mentioned above, the situation in the markets has not improved in the past three months with new lockdowns and closures of HRI businesses due to the pandemic. The impacts are seen at the promotional level as many of the typical marketing activities are not taking place right now. This includes trade shows (first are expected in summer), HRI events, POS samplings, etc. ASMI plans to shift some of the budget to digital alternatives in an effort to find ways to continue promoting Alaska and its seafood species to a wide audience of consumers, traders and gastronomists using online channels, broadcast media, print publications, mobile application and e-commerce advertisement.

ACTIVITY UPDATE

CONSUMER PUBLIC RELATIONS

Student Video Promotion

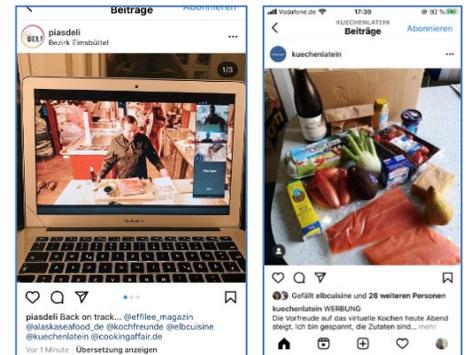
As soon as universities opened again in late September, ASMI carried out the student TV broadcasting promotion. As universities reopened for on campus learning, cafeterias re-opened drawing in young people for their lunch and dinners. Most universities have informational screens in their cafeterias, which share the latest information and updates on school activities, education agendas, eating menus and general news. It was noted that these screens were paid attention to more than in the past due to the pandemic and increase in important information being shared surrounding COVID-19.



ASMI screened a short clip with scenery and fishing highlights as well as the wild, natural, sustainable message. The video was designed to raise attention with its spectacular imagery while directing the audience to the website and social media channels for more information on how to live healthy and economically with Alaska seafood. The ASMI clip was viewed on 108 university TVs and showed 14 times per hour for a period of four weeks, reaching an estimate of 3.4 million viewers.

Media Influencer Campaign

ASMI partnered with the popular food magazine Effilee, to organize a digital cooking show presenting Alaska salmon and salmon roe for an audience of bloggers and journalists. To reach new audiences, a partnership with the popular food network, EatSmarter, was established for the pre-Christmas season to promote Alaska seafood for the holidays. As one of the key go-to-pages for food information, the collaboration offered great potential for ASMI. The EatSmarter feature reached an audience of 263,000 food enthusiasts.



The ASMI cooperation with Effilee reached 75,000 through the print publication while the invited influencers have a combined audience of 476,000 people. The EatSmarter feature reached an audience of 263,000 food enthusiasts.

TRADE PUBLIC RELATIONS AND ADVERTISING

While focusing more on digital messaging and online campaigns, ASMI continues to place advertisement and editorial content in select trade media in the CEU region. Besides publishing ASMI ads addressing the generic Alaska Seafood message, ASMI also supports trade partners to promote Alaska products through



print media placements. ASMI assists trade partners with developing sales and product flyers and informational materials about Alaska seafood products available in the CEU markets. In the past three months, ASMI worked with industry partners Fish Tales, Youkon and Alaska Wildfisch to feature advertisements in key media such as Fisch Magazin, Lebensmittelrundschau, Gourmetro, and Regal as well as placing its own ads in HRI magazines such as Frist Class and GV Manager.

For the first two quarters trade public relations and advertising have resulted in a reach of 521,000 through our own and partnered media placements. ASMI also supported the print production of 160,000 Demeter flyers in Switzerland as well as a digital version.

### RETAIL MERCHANDISING

#### *Friedrichs Online Advertising Campaign*

The former cooperation with Friedrichs was renewed to conduct online advertisement campaigns. As regular POS promotions are not possible due to the pandemic, it was ASMI's goal to support trade partners in new ways. A line up of media spokespersons, a product showcasing, and a recipe development campaign was rolled out to introduce smoked Alaska salmon as an ideal ingredient for hearty dishes during the colder season of the year. The intent of the promotion was to present the product as versatile and to inspire consumers to expand their usage of smoked salmon by trying out new ways to include it in their diets. Similar activities are being planned with the seafood giant Vici, as well as the start-up - Cedar Brothers - during the first half of 2021.



#### *App Advertising Campaign*

After the positive results of the summer BBQ campaign, ASMI started a second promotion within the leading shopping app Bring! to push sales of Alaska seafood prior to the holiday season. Especially as restaurants remain closed, providing inspiration to consumers on what to prepare for their families at home has been an essential part of the program. Through the virtual shopping assistance tool, it is possible to influence the buying decisions of customers when in-store promotions cannot take place.

#### *In-store Promotion with Wechsler*

As one of the few in-store activities, ASMI supported the salmon smoker Wechsler during a short period in September when POS events were possible. Since ASMI partnered with the company before, this short-notice promotion was able to be implemented as all materials and information were already available on-hand.



#### *Results*

The blogger campaign with Friedrichs reported a reach of 12 million on Pinterest, 55,000 on Instagram and 314,000 on personal blogs. The promotion with Wechsler had a value of USD 36,000. Bring! results will be available in January.

### TRADE SHOWS

Trade shows are pretty much non-existent at this time due to the pandemic. Some tradeshows are working on virtual alternatives and ASMI will explore options to exhibit in such online formats. Internorga, one of the leading HRI shows in the German market, is planning a virtual show in March which will most likely be the first online exhibition for ASMI in this region.

### WEBSITE DEVELOPMENT AND MAINTENANCE

With the second cooperation of the shopping app linked to the website and social media channels, as well as promotions such as the student TV campaign and the new media partnerships, ASMI continued its approach to tie-in website and social media presence into the majority of the marketing projects in the region.

### FOODSERVICE PROMOTIONS

The HRI market remains challenging due to the closure of most restaurants and foodservice businesses. Which, of course, leads to limited options for promotional activities and ASMI partnerships. ASMI will support online editions of HRI events such as HoReCa Krakow or the Chef Congress in Poland during the upcoming months. Delivery concepts are also an option for cooperation but still complicated to finalize.

### CHEF EDUCATION

With restaurants closed, it was important to find new ways to work with chefs to showcase the culinary versatility of Alaska seafood. To do so, Alaska worked with Kirberg Catering to run an online cooking class. During two virtual gatherings, Volker Beuchert prepared a dish live for the audience via zoom. Each participant received a box with the ingredients in advance with Alaska wild salmon and caviar as key items and followed the instructions to cook the dish at home with the guidance of the professional chef. Invited guests represented HRI, trade and consumer media as well as food industry members. Forty-nine professionals attended.



## NORTHERN EU (U.K., IRELAND, THE NETHERLANDS, FINLAND, DENMARK, SWEDEN)

### MARKET UPDATE

After a brief and partial relaxation of the rules over Christmas and New Year, many European countries have returned to the tough regulations that were imposed this autumn – with some tightening measures even further. According to the World Health Organization, in the final week of 2020, the UK had a 14-day new-case notification rate of 720 for every 100,000 people, more than double that in France, Germany, Italy and Spain but lower than the Czech Republic, the Netherlands, Sweden and Denmark.

Brexit negotiations between the UK and EU continued apace with both parties arriving at an eleventh-hour trade agreement at the end of December. Early indications at the time of writing in January, are that there are some shortages of products into grocery retail due to additional administrative processes. Seafood exports from the UK are suffering with delays at customs causing fish to perish. Of concern, we are seeing a further move to British produce with ALDI committing and incremental £3.5 billion spend to British food and drink sourcing.

During the negotiation period with the EU, the UK announced that it would not adopt the 25% retaliatory tariffs that had been applied by the EU on salmon fillets (along with other food products) from the US as part of the ongoing Airbus/Boeing dispute.

The latest GDP growth rates take us to the end of September 2020 in most cases. Across the region, we have seen a growth in GDP during the three months to September 2020 as businesses were able to reopen and a sense of optimism began to return. This was reflected in Consumer Confidence data across the region. However, these data tell the story up until the new variant of the Coronavirus was discovered and the new wave of restrictions took hold across Europe. The next quarter report will continue to show data fluctuations across the region as restrictions are paused and reintroduced, businesses navigate the storm and expectations surrounding consumers' financial situation change.

Grocery performance across the region saw sales peak in December as consumers stocked up for Christmas; in the UK the grocery sector enjoyed growth of +11.4%. The UK has additionally seen stockpiling taking place with 52% of consumers saying that they have stockpiled on food items due to Brexit and Coronavirus worries.

Retail foot traffic has dropped significantly – with a 27% drop in the UK. However, online sales continue to boom, even in countries that do not have a traditional supermarket delivery market. In Ireland, online sales increased 74.8% in the November reporting period and Dutch retailer Plus reported that turnover in the company's e-commerce division increased by more than 130% as more customers ordered online due to the pandemic.

## Northern Europe

Outside of pandemic-related news, the meat-free movement continues albeit in a more muted manner. Across a backdrop of fish counter closures across UK supermarkets, ASDA is trialling a vegan butcher counter in one of its stores in January as well as adding 22 new meat-free lines to its repertoire. Vitamin D continues to take a prominent place in headlines as an open letter to world governments from science professionals across the UK, Europe and the US stated that there is clear evidence that Vitamin D can reduce COVID-19 infections.

### ACTIVITY UPDATE

#### CONSUMER PUBLIC RELATIONS

##### Media Education

During Q2, ASMI NEU wrote to the Times to correct a misinformed journalist who claimed that “farmed salmon is almost always better than wild salmon.” This was published in the Times the following day.

##### Food Tribe Alaska Seafood Christmas Campaign

Findings from the Kantar research suggested that seasonal occasions throughout the year are key moments of fish consumption among consumers. ASMI NEU worked with Food Tribe in order to take advantage of this insight and created an Alaska Seafood Christmas campaign with the foodie platform.

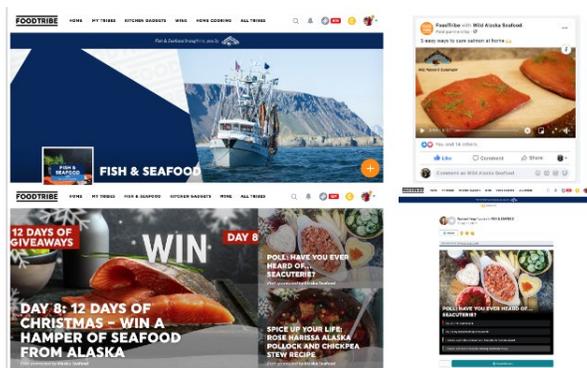
The campaign consisted of video content, animated social posts, feature articles, recipes, a social giveaway and takeovers of both the ‘seafood tribe’ and the Food Tribe homepage.

##### Results

The campaign was targeted to achieve 2 million impressions and 500,000 video views. It far exceeded this figure with the campaign reaching a total of over 2.5 million impressions and over one million video plays. The campaign also had an 86% positive campaign sentiment level, which is a 32% increase since the last campaign and the highest Food Tribe has ever received for commercial content.

#### Wild salmon stocks

Sir, In your article “Now that wild sea bass is off the menu, what fish can we cook without guilt?” (Times2, Oct 8) you say that “farmed salmon is almost always better than wild salmon”. Alaska produces about 400,000 tonnes of wild salmon each year, equating to 206.9 million fish (2019). A range of measures are in place in Alaska to maintain fish numbers: salmon are counted upstream to ensure there are enough fish spawning for future years, there are aerial and land-based surveys, bycatch is next to none and catch quotas are strictly monitored. Alaskan fish is certified by the Marine Stewardship Council and by Responsible Fisheries Management. In the context of UK fisheries, it may be that wild salmon is unsustainable but this is not the case in Alaska.  
**Rebecca Wilson**  
Trade director for Alaska Seafood Marketing Institute, Northern Europe



- Total impressions: 2,503,504
- Total reach: 1,349,904
- Total engagements: 16,383
- Video plays: 1,118,807

#### CONSUMER ADVERTISING

##### Vogue Food Week

ASMI contributed to the first Vogue Food Week in order to once again coincide with the increase in seafood consumption in the run up to Christmas. The campaign promoted the premium nature of Alaska Seafood to an audience with a high grocery spend. Vogue has 3.2 million monthly unique users and a combined social following of 11.1m.

The campaign consisted of a single page magazine advertorial, a native article on Vogue.com, social media posts across British Vogue platforms and inclusion in the Vogue e-newsletter.

## Northern Europe

### Results

Overall the campaign was a success with the native article performing incredibly well. Impressions exceeded expectations and the click through rate was strong across all formats. The page views were above average considering the amount invested in the campaign and the dwell time was 44 seconds above the average.

### Run of site traffic drivers:

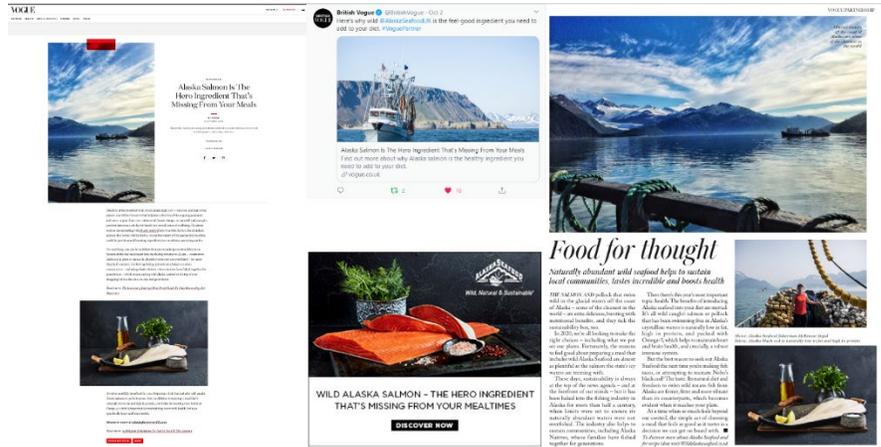
**Combined impressions:** 329,604  
**Combined clicks:** 968  
**Average click rate:** 0.29%

### Native article:

**Users:** 3,156  
**Pageviews:** 3,557  
**Avg. Time on page:** 1min 44secs

### Newsletter:

**Clicks recorded:** 40



### Foodism Magazine

As a result of COVID-19, an increased number of consumers have been eating lunch at home. In order to support this new trend, ASMI NEU paid for an advertisement in Foodism magazine to showcase Alaska Seafood as the must-have ingredient for lunch at home. The ad was featured in the Christmas issue of Foodism, which was part of their relaunch.

### Results

- Posted to: 50,000 consumers
- Available in supermarkets as a free to pick up publication
- Only full-page advert in the fish feature of the magazine



## TRADE ADVERTISING/PUBLIC RELATIONS

To support the findings from the Kantar Consumer Research, ASMI NEU worked with the design agency Design By Soap who converted the research into a document filled with infographics which made the findings easier to digest.

In addition, ASMI paid for a features package with the trade magazine *The Grocer*, showcasing the Kantar consumer research to retailers and suppliers while highlighting the key findings.

### Results

- Impressions: 91,683
- Clicks: 17
- Average time in view (seconds): 35.15
- Minutes in view: 53,705
- Hours in view: 896

## RETAIL MERCHANDISING

### NESI Activity, July 2020 – January 2021

ASMI NEU agreed to support a range of marketing proposals with New England Seafood to drive salmon fillets' sales, smoked salmon packs, and pollock in Waitrose. The pollock promotional activity will support NESI in launching the first



## Northern Europe

chilled pollock product in supermarkets in the UK. ASMI has also committed to a promotion with Tesco, which will feature LEAP smoked Alaska sockeye salmon at Christmas.

The list of tactics will run until Q3 and includes:

### Salmon

- Full page advertorial in Waitrose Weekend (340,000 circulation)
- Full page advertorial in Waitrose Food Magazine - New Season Salmon (676,902 circulation)
- Banners online at Waitrose.com - Alaskan Sockeye Salmon Fillets / LEAP Smoked Keta and Smoked Sockeye
- Sponsored product online at Waitrose.com

Pollock (NESI also secured funding from GAPP for this promotional activity)

- Sponsored product on Waitrose.com
- Banners online at Waitrose.com
- Full page advertorial in Waitrose Weekend
- In-store recipe card
- Recipe sponsor on Waitrose.com
- Full page advertorial in Waitrose Food Magazine
- Recipe sponsor in Waitrose Food Magazine

Activity with NESI x Tesco to include:

- Inclusion of LEAP wild Alaska smoked salmon in the Christmas issue of the Tesco Magazine (1,934,504 circulation)

## Results

- LEAP wild Alaska smoked salmon was featured on the first page of the Christmas issue of the Tesco Magazine, serving as an excellent brand awareness tactic.
- NESI also supported this activity with £30k of media, which included the below search banners.
- Kantar research shows that Tesco was the biggest performing retail chain over the period, with 14.3% of total Christmas grocery sales taken by their stores. Therefore, choosing to run this Christmas campaign in partnership with them was very beneficial for ASMI.
- Tesco and Waitrose also performed well in the lead up to Christmas.



## Formans Promotion

To support the pre-Christmas launch of Formans smoked Alaska king salmon, ASMI NEU provided funding for promotional activity surrounding the product launch. The activations consisted of samples being sent to their top customers with a leaflet telling the story of Alaska seafood, social media promotion and inclusion in the Formans newsletter.

## FOODSERVICE ADVERTISING/PUBLIC RELATIONS

### *The Caterer*

In order to support the foodservice industry following the closure of thousands of hospitality businesses during lockdown, ASMI NEU created a new funding initiative. This arrangement offered marketing support to those establishments that list Alaska seafood on their menus currently and those that are interested in doing so in the future. To help launch this project ASMI partnered with foodservice magazine, *The Caterer*.

### *Results*

The Seafood feature on the website gained the following:

- 144 Page views with an average time on the page of two minutes 28 which indicates that users were engaged with the feature and read it for the duration they visited

Alaska ads around the seafood feature on the site:

- 210 impressions

Bespoke email sent out on 18<sup>th</sup> September:

- Delivered 14,914
- Opened: 2,877
- Open rate: 15.19%
- Total clicks: 53

ASMI NEU's funding initiative received positive responses with many chefs getting in touch. Currently, two promising conversations are ongoing with the following establishments:

- Interesting Hotels
- Euston Square Hotel

### *Stockpot Magazine*

ASMI NEU continued to promote the marketing funding initiative during Q2. This time via *Stockpot Magazine* in order to provide promotional funding to restaurants that feature, or are interested in featuring, Alaska seafood as a menu item. The activity also aided in securing chef responses to the HRI survey.

### *Results*

Stockpot Magazine ad: circulation of 7,500 readers

Email: distributed to 5,000 chef



## SOUTHERN EU (SPAIN, PORTUGAL, ITALY)

### MARKET UPDATE

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Retail demand for frozen seafood has been relatively strong during the coronavirus crisis, but imports of Alaska keta salmon will certainly decline again this coming season due to Alaska's very small 2020 keta salmon harvest as well as current low prices of fresh Atlantic salmon. Restaurant demand for seafood is down at least 50% due to coronavirus-related restrictions and closures which will directly affect sales of sockeye, king and coho salmon in the region. SEU smokers complain of lack of availability of king, coho, and sockeye salmon. Italy's leading king salmon smoker, COAM, has cancelled all promotional activities in 2020-21 due to their inability to source sufficient supply of raw material. The leading sockeye smoker in Italy says the sockeye salmon he is getting this year is very small, making it a less attractive product for retailers and consumers.

In October 2020, the EU introduced new tariffs on US goods. Additional tariffs of 25% on a range of agricultural and industrial products imported from the states. The commission's preliminary list had covered a range of U.S. goods, including some 42 different U.S. seafood products. However, the final published list included four seafood items: frozen Atlantic salmon, frozen Pacific salmon fillets, smoked Pacific salmon, and scallops. Alaska cod and pollock will not face additional tariffs, but a 27% total import tariff on single-frozen Alaska sockeye salmon fillets will hurt our export sales of this increasingly popular product in EU markets (Source: [www.seafoodsource.com](http://www.seafoodsource.com)).

SEU Market for Alaska Pollock Surimi: demand from surimi producers, primarily in Spain, started to rise in the 2nd quarter of 2020 and that reflected in the 3rd quarter figures, when the volumes from the U.S.A. grew by 6%, compared to the 2nd quarter.

SEU Market for Alaska Pollock Fillet: Imports of Chinese processed APO fillet, directly from China and via northern Europe, dominate all four SEU APO fillet markets. Single-frozen genuine APO fillets decreased their share from 20% to 15% in the 3rd quarter of 2020. Spain accounted for 56% of all APO fillets imported from the U.S.A. to the SEU market in the 3rd quarter of 2020.

#### Portuguese Imports of H&G Cod:

Portugal is the predominant SEU importer of frozen H&G cod, almost all of which is salted and sold in the domestic market, or exported to Brazil, France, Italy and other markets. Imports from the Netherlands are mostly Norwegian gadus morhua. Portuguese imports of cod have been steadily declining since the summer of 2018. In the 3rd quarter of 2020, Alaska cod constituted 13% of total H&G cod import volumes.

#### SEU Market for Salmon:

Spain fresh salmon imports (Nov-Oct market year):	+7.29% to 47,289 MT in 2020
Italy fresh salmon imports (Oct-Sept market year):	-5.09% to 47,062 MT in 2020
Portugal fresh salmon imports (Nov-Oct market year):	+21.69% to 8,095 MT in 2020
Greece fresh salmon imports (Dec-Nov market year):	-9.74% to 6,781 MT in 2020
Spain frozen Pacific salmon imports (Nov-Oct market year):	-23.81% to 1,344 MT in 2020
Italy frozen Pacific salmon imports (Oct-Sept market year):	-34.54% to 1,599 MT in 2020
Portugal frozen Pacific salmon imports (Nov-Oct market year):	-24.63% to 1,368 MT in 2020
Greece frozen Pacific salmon imports (Dec-Nov market year):	-6.4% to 92 MT in 2020

## Southern Europe

Farmed salmon prices have been low all year and SEU import volumes have stayed generally strong despite the coronavirus pandemic. SEU import volumes of frozen Pacific salmon, on the other hand, have suffered due to limited availability and higher prices as well as the lack of restaurant demand.

### ACTIVITY UPDATE

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#### TRADE SHOWS

##### *Seafood Expo Global 2021 Preparation*

ASMI-SEU coordinated the RFP process for construction of the Alaska Seafood pavilion in SEG 2021.

#### RETAIL MERCHANDISING

##### *Makro Experience - October 13, 2020*

ASMI SEU collaborated with Makro retailer and took part in the HORECA Day in Spain. ASMI sent products to two restaurants: Nectari in Barcelona and Kabuki/Kirei in Madrid.

The restaurants prepared a tasting menu with sockeye, black cod and ikura, 120 portions of each dish. Nectari chefs prepared a canalon of sockeye salmon and black cod baked with tomato puree. Kabuki chefs cooked wild salmon tataki and black cod with miso.

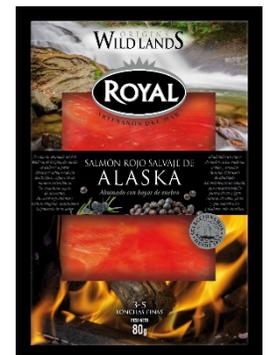
Makro delivered a box with food prepared by these two restaurants, together with other products and beverages directly to 120 bloggers, influencers and food writers in Madrid (60) and Barcelona (60), to celebrate the HORECA Day.

Some of the Influencers (among others):

- Carme Gasull, journalist Gastronomistas, 7k followers
- Blog Hedonista, blogger, 45k followers
- Mar Villalobos, RTVE, 13k followers
- Borja Lopez, chef, 27k followers
- Javier de La Fuente – RTVE
- El blog de Celest, food blogger, 31k followers
- Foodie Tour BCN, blog, 18k followers
- Marc Carbonell, blog, 43k followers
- Pepa Muñoz, chef, 25k followers
- Gastrorgasmico, blog, 51k followers
- Tana Collados, journalist TV3, 2k followers
- Eat In BCN, 68k followers
- Best Burger BCN, 36k followers
- Alejandra Anson, 15k followers
- Esteban Capdevila, foodie, 2k followers

##### *ROYAL Origin Identified Product Launch*

Spain's leading smoked salmon brand, Royal, launched a smoked wild Alaska sockeye salmon product in the fourth quarter of 2020 and began referencing it in various leading supermarket chains in Spain.



## TRADE PUBLIC RELATIONS

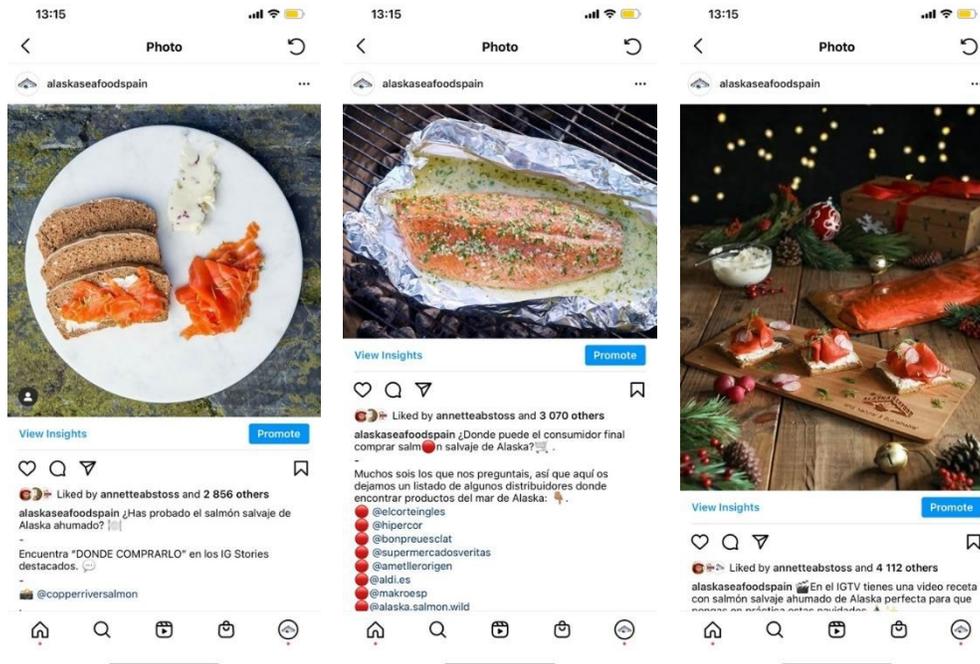
ASMI SEU is working to generate mentions and discussions of Alaska seafood in traditional HRI and seafood trade press as well as in HRI and food blogs and social media using press releases, product tastings, contests, chef demonstrations, as well as regular postings and promotions on ASMI SEU's social media.

### Spain Social Media

Instagram is the leading platform for food-related social media posts in Spain. According to the social media consulting firm QuikRelations Group, 84% of food-related posts in Spain are posted on Instagram vs. 16% for Facebook. ASMI conducted a social media campaign focused on professional chefs prioritizing the use of the IG platform.

### Results

Over the second quarter ASMI posted 192 stories on Instagram and Facebook. ASMI posts about people and local events in InstaStories and save our important stories, IGLives, etc. in the Highlights. In the second quarter, ASMI spent \$150 for boosted posts, which increased our Reach by 66% and Engagement by 177%. (Every post we boost has 12 placements spread over Instagram and Facebook, Facebook marketplace, Stories IG and FB, searches, feed and explore).



### Portugal Social Media

Instagram is also the leading platform for food-related social media posts in Portugal. According to the marketing consulting firm Markttest, 86% of food-related posts in Portugal are posted on Instagram vs. 18% for Facebook. In 2020, Facebook dropped from 72% to 45% of users in Portugal. ASMI conducted a social media campaign focused on professional chefs prioritizing the use of the IG platform.

## Southern Europe

### Results

Over this last quarter ASMI posted 54 stories on Instagram and Facebook. ASMI posts about people and local events in InstaStories and save our important stories, IGLives, etc. in the Highlights. In the second quarter, ASMI spent \$160 for boosted posts which increased our Reach by 48% and Engagement by 313%.

### Greece Social Media

ASMI SEU created the Greece social media platforms in Instagram and Facebook in Q1. Currently, we make three posts per week, in English.

### WEBSITE

In November, the new website was launched. The major improvement of “Where to buy” part was done and an interactive map and delivery part were added. It turned out to be the third most viewed page of the website. The information on the website was also updated. ASMI SEU is preparing to launch a new version of the Italy site and the Greece website is under construction.

### HRI TRADE SHOWS

No activity this quarter as all HRI trade shows have been cancelled or converted to on-line formats.

### CHEF/TRADE TRAINING SEMINAR

#### Annual Gastronomic Championship

ASMI SEU collaborated with the Annual Gastronomic Championship organized by “The Chefs and Pastry-chefs Association of Madrid” (ACYRE Madrid) to vote for the Best Chef Team in the Community of Madrid 2020. The competition takes place in November, December and January. Alaska fish was used November 11, 2020.

The contest consists of various rounds, starting with a preliminary phase during the year to select the top 12 teams - followed by four elimination rounds. This year, due to Covid restrictions, the competition was different, the teams were sent ingredient boxes to their restaurants and cooked online. For the second round, the quarterfinals, there were eight teams left. Judges went to each restaurant to evaluate the dishes. The Final will take place in January. The winner will represent Madrid in the National Spanish Championship.

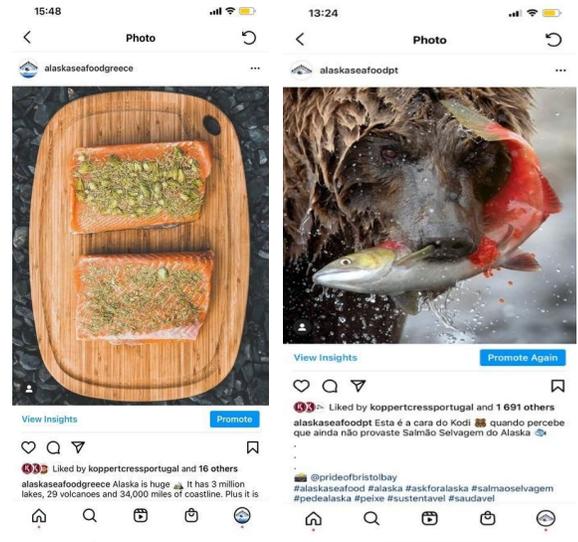
ASMI SEU sent 10kg of sockeye salmon fillets, procured from Wild Alaska Salmon, to ACYRE, which were added to the ingredient kits the participants received the 2nd day of the competition. ASMI may send the additional product for the Finals, however, it is unclear how the Finals will be organized due to Covid.

ASMI logo was displayed in all official communications and on the kit boxes sent to participants during all rounds of the championship. The logo will also appear on the photoshoot which will be set up during the final.

### Dishes

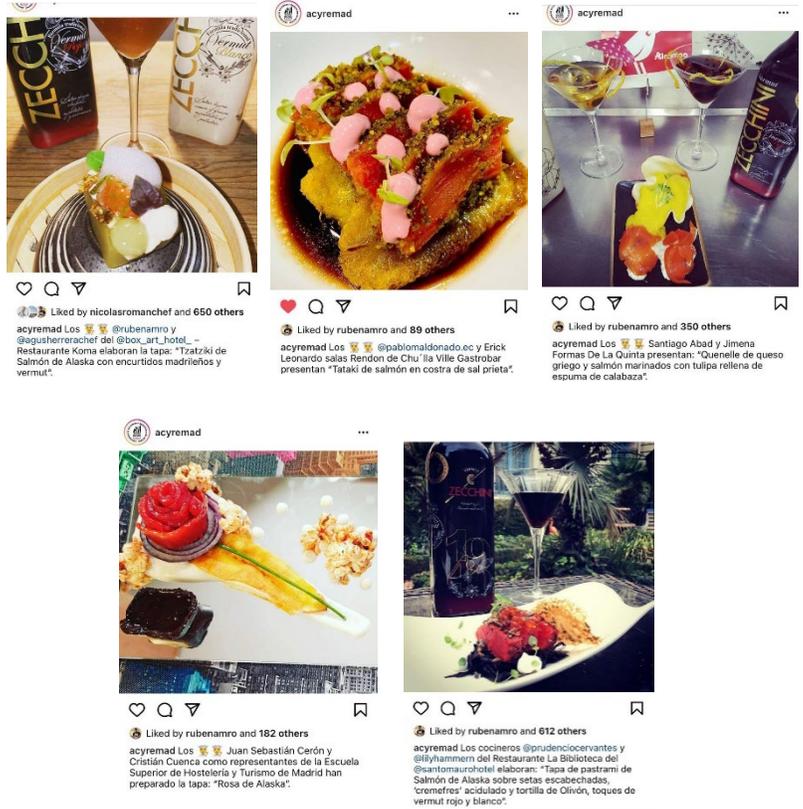
On Day 2 of the competition, one of the ingredients for the recipes was Wild Alaska Sockeye Salmon. The chefs prepared a “tapa”, an appetizer, using salmon and vermouth.

These ingredients were sent to the 8 remaining teams, and the participants prepared the following dishes:



## Southern Europe

- Cream-cheese quenelles with marinated wild Alaska salmon with vermouth and pumpkin foam
- Wild Alaska salmon tataki with salt crust & vermouth sauce.
- Wild Alaska salmon & Zucchini chess
- Wild Alaska salmon tzatziki with pickled vegetables and vermouth
- Wild Alaska salmon and Omega 3
- Braided wild Alaska salmon yogurt gravlax
- Wild Alaska Salmon rose
- Wild Alaska salmon pastrami with pickled mushrooms



## Social Media Posts



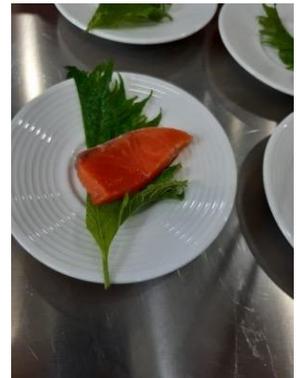
## Southern Europe

### *Chef Demo Class with chef Luis Barradas*

Offline chef demonstration class by ASMI chef ambassador in Portugal, sushi chef Luis Barradas, who told about Alaska Seafood products to students of the Cooking Class of Escola de Comércio de Lisboa.

Luis Barradas told about ASMI and its goals, Alaska Seafood, and sustainable fishing. He gave some ideas of different dishes with wild Alaska salmon as well as he told about his trip to Alaska and students could ask him questions about it.

The second part of the class was practical. The chef showed how to handle wild salmon and how to fillet it. He cooked wild salmon sashimi with ikura and black cod with miso sauce in the oven.



## CHEF/TRADE IMMERSION AND E-IMMERSION

### *Alaska Seafood Tasting Menu at Rest. Atocha*

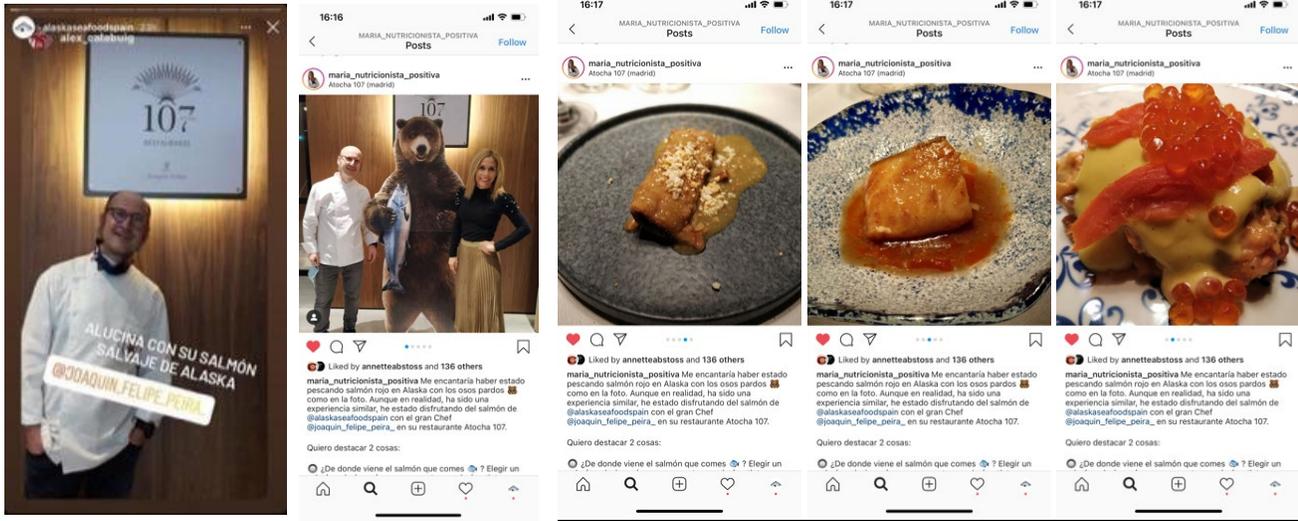
Rest. Atocha 107 wanted to collaborate with ASMI and prepared a special tasting menu for the weekends. ASMI SEU teamed up with Joaquin Felipe to create this special menu with Alaska Seafood products. Joaquin Felipe prepared a menu of 4 dishes: sockeye salmon (smoked and fillet), ikura and Alaska cod.

ASMI invited influencers to enjoy the special Alaska Seafood dinner.

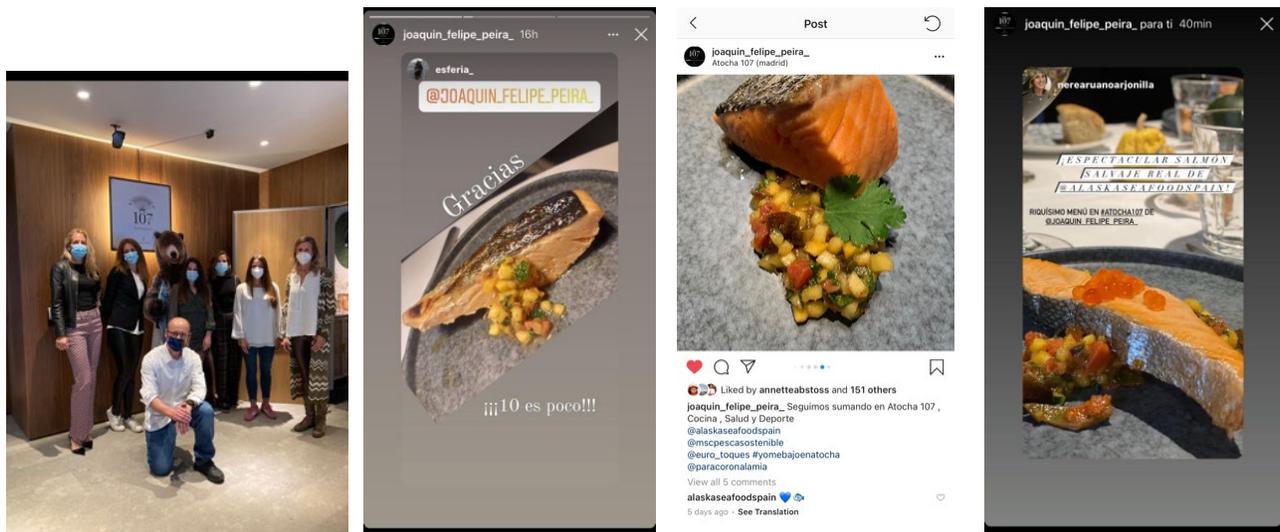
Special guests included Maria Muñoz Yuste - @Maria-Nutricionista Positiva – expert nutritionist in weight loss with 5k followers and her colleague from Shain Nutrition.



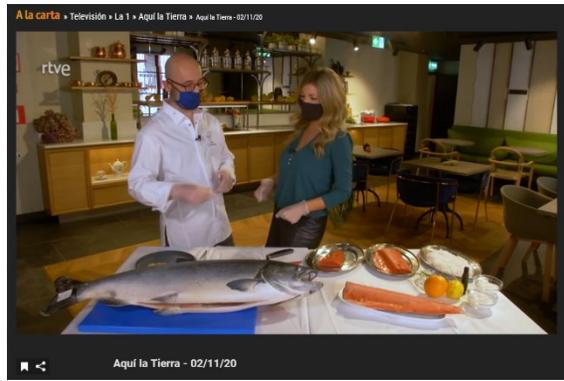
Social Media



Other special guests included the Female Running Team from Madrid (6 athletes).



Chef Felipe's Alaska Seafood dinners attracted the attention of the producers of the Aquí La Tierra TV program, which filmed a 4 minute 20 second report on how to prepare wild Alaska salmon featuring Chef Felipe working with Alaska king and sockeye salmon. This program aired on November 2, 2020 and was viewed by an audience of 1,648,000 Spaniards and has an advertising value of over 20,000€.



*Online Cooking Workshop*

ASMI SEU organized a virtual online cooking workshop on Zoom where chef Joaquín Felipe explained to the participants the recipes step by step. For this edition, he created two dishes with Alaska sockeye salmon. The workshop took two hours. We also added a couple small loins of Alaska cod to try out at home.

Attendees

Spanish journalists and influencers from Madrid and Barcelona:

- Laia Zieger, Journalist at Gastronomista - Barcelona
- Toni Baena, Journalist at Antena 3 (TV) - Madrid
- Sabina Banzo, TV presenter for show “Aquí en la Tierra” – RTVE- Madrid
- Nuria & José María Toro, Food Blog Bloghedonista - Barcelona
- Salvador Garcia-Arbós- Food journalist – Girona
- Maria Manzano, TV presenter for Cuatro/Telemadrid/LaSexta - Madrid
- Alejandra Feldman, Blogger and freelance food journalist - Madrid

Menu

Starter: “escabeche,” marinated sockeye salmon

Main dish: Sockeye salmon “Villeroy” on a bed of roasted red peppers and pomegranate (sockeye fillets with béchamel sauce, covered in breadcrumbs and fried)

The dinner kits included:

- a) Educational materials and souvenirs:
  - Alaska Seafood isothermal bag
  - Alaska Seafood apron
  - Alaska Seafood pen
  - Alaska Seafood cardholder for cellphones
  - A set of educational materials
  - Event description with information on the workshop and recipes
- b) Ingredient kit

Post event survey

QUESTIONS	SUMMARY ANSWERS
What did you think about the virtual dinner?	5/5 very interesting
What did you think about the pace of the event? Were you able to follow the chef correctly?	4,2/5 easy to follow, but sometimes needed chef to slow down a little and repeat
What is your opinion on the quality of the wild smoked salmon?	5/5 excellent
What is your opinion of the “salmon escabeche” dish?	4,5/5 very good

## Southern Europe

What is your opinion on the “salmon Villeroy” dish?	5/5 very good
What is your opinion on the information sent to you prior to the virtual dinner? (kit including: brochures, promotional materials & Alaska seafood products)	5/5 excellent
Do you believe the kit sent was complete?	5/5 yes
Did you find the activity interesting? Would you recommend it or partake in it again?	5/5 very recommendable
What impression would you have if the experience were priced at 50€?	4,5/5 reasonable
What is your opinion concerning the starting time & duration of the event?	5/5 good timing and duration.
Is there anything you would have changed or improved? & general feedback	Perhaps some of the steps could be prepped in advance, to have more time to chat with other participants and the chef. But all in all great experience. People were very enthusiastic, said that it was great to do something different during these restricted time.

## Social media posts



## Alaska Pollock Recipe and Photo Production - November 2020

ASMI SEU produced recipes and a photoshoot with the Chef Joaquin Felipe, photographer Javier Peñas. The photos will be used to promote the new Pollock fillets in restaurants. Photos show the set of ingredients needed per each dish, intermediate result and the plated dish. Below are some examples of the images.





### EASTERN EUROPE (RUSSIA, UKRAINE, AND CIS)

#### MARKET UPDATE

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##### *Russia*

Economic conditions seemed to improve somewhat in Q3, after GDP shrank at the sharpest rate in a decade in Q2. In Q3, economic activity fell at a much softer pace than Q2's average, supported by a gradual recovery in the vital industrial sector, as manufacturing firms continued to ramp up capacity, which partly offset sliding mining output. Moreover, the easing of restrictions should have boosted household spending. The drop in retail sales softened considerably in Q3, which, coupled with an uptick in consumer confidence, points to returning consumer demand. That said, a weaker ruble and rising unemployment rate likely tempered the rebound. Externally, conditions were more downbeat: merchandise exports continued to slide in July–August amid constrained domestic oil output and depressed global crude prices. Turning to Q4, worsening private sector conditions and surging new COVID-19 cases threaten to derail the fragile recovery.

##### *Ukraine*

Sequential data hints at a fragile recovery in Q3, after the Covid-19 outbreak and associated lockdown measures pummeled activity in Q2. Industrial output continued to shrink in September, although at a softer pace than in August thanks to less downbeat manufacturing and energy production. More positively, retail sales growth was robust in Q3, which, coupled with steadily firming, albeit still weak, consumer sentiment, bodes well for household spending. That said, the persistent rise in Covid-19 cases, which picked up notably in October, prompted the government to extend the adaptive quarantine system until year-end—raising the possibility of tightening restrictions and thus potentially hampering the recovery in Q4. In politics, the October 25 local elections dealt a setback to President Zelensky given the weak results for his party and declining approval ratings.

#### ACTIVITY UPDATE

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##### TRADE SERVICING

###### *Easyfish Platform Ukraine - preparatory phase: SEO-SERM, Ukraine*

In preparation for the Easyfish Platform launch, ASMI coordinated the SEO-SERM preparation process to increase the platform's visibility online and optimize search engine results, as well as improve its name and credibility. The first stage of SEO-SERM was accomplished in September-October and tasks included reputation and keyword research, search queries analysis, and analysis of niche and competitors in Ukraine.

The second phase, which took place in October 2020, consisted of edits in the relevance map, addition of semantics field, writing the key words and phrases for the texts on the website - including recipes.

The final goal of the platform's SEO-SERM project is to make a large promotional campaign and put ASMI's Easyfish Platform in the top positions of fish queries.

The full task list for SEO-SERM is:

- Analysis of niche and competitors in Ukraine

- Collection of semantics for category pages
- Formation of the structure of site categories
- Copywriting requirements for categories
- Formation of a map of relevance of categories
- Map of redirects from old domains and moving to GSC
- Technical audit of the site before and after launch and verification of edits
- Creating a project to track positions
- Setting up analytics systems (GTM, GA, GSC)
- Forming a content plan for 1-3 months
- Writing a TOR on an article according to a content plan (this will be an ongoing process)

### *Easyfish Platform Ukraine - KOLs cooperation*

In order to support the Easyfish platform launch, ASMI partnered with top Ukrainian KOLs including chefs, nutritionists, and culinary enthusiasts. KOLs participated in the video content creation in order to enhance projects visibility and increase credibility.

As a result, over 22 video clips were created featuring Alaska seafood species in the new culinary recipes. The created content/recipes were placed on the Easyfish web-site and YouTube channel and was further advertised in social media. KOLs then supported the Easyfish platform launch with announcements on their own Instagram accounts.

KOLs list and video content:

**Volodymyr Yaroslavskiy** – 2018 ASMI Culinary retreat graduate, Master Chef show judge, Lucky Restaurant and Vinoteque co-owner and Chef. 155,000 Instagram followers.

Basic skills

- Salted sockeye – partner GoodWine
- Filleting Alaska pollock – partner UFC
- Thawing the fish – partner UFC
- Pre-salting the fish before cooking – partner GoodWine
- Frying the salmon and how to understand that it is ready – partner GoodWine

Recipes

- Alaska pollock gratin – partner UFC
- Black cod with miso sauce – partner GoodWine
- Alaska salmon with potato puree – partner GoodWine
- Buckwheat chips with Alaska salmon roe – partner GoodWine

**Anastasia Goloborodko** - Certified public nutritionist, nutrition therapist. 32,000 Instagram followers.

Recipes

- Alaska pollock, fried with spices – partner UFC
- Healthy breakfast. Eggs with salmon roe – partner GoodWine
- Sockeye, baked with herbs – partner GoodWine

How to choose the fish – 2 videos in GoodWine supermarket in Kyiv

**Edik Kanaryan** – Master Chef winner, Zweig restaurant Chef. 52,000 Instagram followers, 37,000 YouTube followers.

- Salted sockeye with vegetables – partner GoodWine
- Smoked Alaska pollock – partner UFC

## Eastern EU

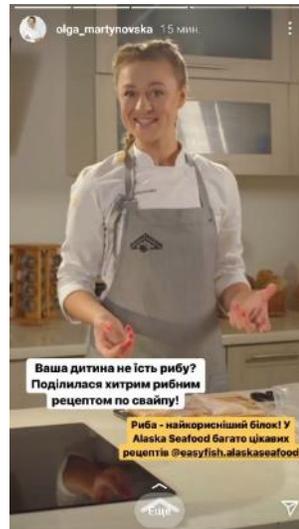
- Black cod with seaweed and mushrooms – partner GoodWine

**Olga Martynovskaya** – Master Chef show judge, French restaurant Les Foodies Paris co-owner and Chef, 122,000 Instagram followers.

- Alaska pollock nuggets (child-friendly recipe) – partner UFC
- Alaska salmon roe appetizer – partner UFC
- Alaska pollock with green curry – partner UFC

**Tatiana Litvinova** – ex Master Chef judge, TV host, catering owner, gastro enthusiast. 526,000 Instagram followers, 130,000 YouTube followers.

- Alaska pollock muffins (child-friendly recipe) – partner UFC
- Sockeye pie – partner GoodWine
- Sockeye sous vide – partner GoodWine
- Profiteroles with salmon roe and smoked sockeye or pink salmon – partner UFC



**Yevgen Klopotenko** – Master Chef winner, gastro enthusiast, 100 rokiv tomu vpered restaurant co-owner and Chef, school program CultFood creator. 538,000 Instagram followers, 125,000 YouTube followers.

Video shooting in progress.

### *Trade market visit, Kyiv, Ukraine*

At the beginning of October 2020, ASMI representatives made a trade market visit to Kyiv in order to maintain personal communication with Ukrainian partners, evaluate accomplished promotions, discuss the promotional season 2020-21, plan future activities and discuss the Easyfish platform cooperation.

Meeting list included:

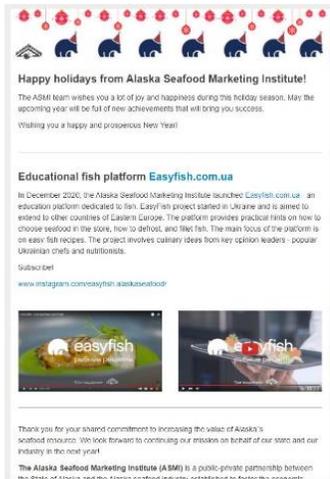
- Importers: Universal Fish Company, 1st Ikornaya Company (Gelios, Merezha), Flagman Seafood, InterRybFlot;
- Retailers: Fozzy Group (Silpo markets), Good Wine (high end retailer in Kiev), Don Mare
- Other: Association of Ukrainian Importers of Fish and Seafood;
- Lira promotional agency;
- Fontegro Chef's Association,
- Michurin BTL Agency,
- Okaymonday communication agency,
- Ukraine Chefs Association.

Store checks were also conducted to three retail chains and specialized seafood stores including: Silpo, GoodWine, Auchan.

### *ASMI Quarterly Newsletter*

In Q2, ASMI EEU made two direct mail campaigns. The first one announced the launch of the Easyfish platform, the participation of the ambassadors, and featured new recipes. The second one was dedicated to the New Year holidays. The newsletters also contained updates on ASMI events in the region and an invitation for future marketing collaborations.

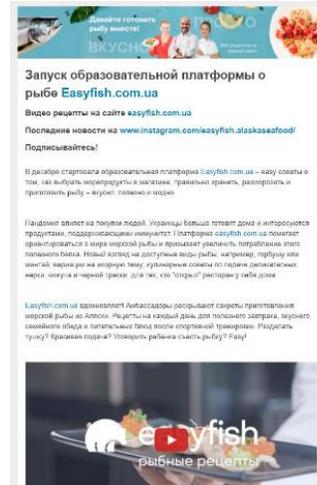
Audience: over 350 professionals in 11 countries. The bilingual newsletter was distributed via email.



Newsletter in English



Newsletter in Russian



Easyfish newsletter

### Ukrainian Importers of Fish and Seafood Association SMM promotion, Ukraine

The Association of Ukrainian Importers of Fish and Seafood unites fish industry representatives in the country. The association has become an important platform for business communication of the participants of the seafood sector. Since 2019, ASMI has used UIFSA social media platforms to post Alaska related information in order to reach out to the target audience in the country.

During Q2, three posts were published on the UIFSA Facebook page [www.facebook.com/uifsa.ua](http://www.facebook.com/uifsa.ua) (more than 2,000 followers) and one article on the website [uifsa.ua/en/](http://uifsa.ua/en/) in the section “Advice from Alaska Seafood.” The article was dedicated to the Alaska crab industry.

The posts on Alaska crab included information on how to choose salmon roe (last year’s article) and the announcement of the Easyfish platform. All the posts were boosted in order to reach out to ASMI’s target audience in Ukraine. The total reach on Facebook was 15,000 ppl, the total reach of the articles was 1,600 ppl.

The total reach on Facebook was more than 230,000 ppl, the total reach of the article was 1,400 ppl.

The main goal of the promo was to educate Ukrainian fish industry about Alaska Seafood and its distinctive features and to increase brand recognition. Posts were also read by final consumers.

### TRADE SHOWS

#### Interfood & Drink, Sofia, Bulgaria

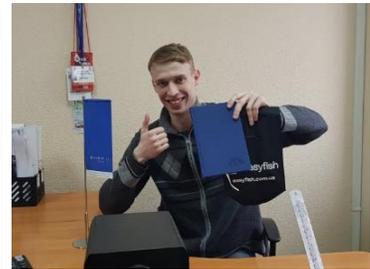
Professional trade show, dedicated to the food industry, was held in Sofia, Bulgaria. USDA Sofia asked ASMI to provide materials for distribution during the trade show. ASMI HQ sent a set of the materials in English to the USDA Sofia office.

This is the first time ASMI has participated in this trade show in Bulgaria. Based on information from USDA, COVID-19 greatly reduced the number of attendees. USDA Sofia placed the ASMI brochures and promo materials at the central position in the booth. According to the USDA report, there was a certain interest in ASMI materials. After the trade show, USDA Sofia distributed the remaining brochures among fish importers in Bulgaria via mail.



*New Year Incentives*

ASMI designed and produced branded incentives including lunch boxes, power banks, personal organizers, and pens. Thirty loyal ASMI partners in the EEU region received trade incentives during the New Year period.



**RETAIL MERCHANDISING**

*Klion SMM, Ukraine*

Klion Group is one of the largest Ukrainian fish and seafood importers and retail suppliers. The company was founded in 2005 in Zaporizhzhya, Eastern Ukraine. The company has seven branches that are located across Ukraine: Kyiv, Kharkiv, Odessa, Lviv, Rivne, Vinnytsia and Zaporizhzhya.

ASMI EEU coordinated a joint SMM promotion with Klion. The promotion included social media activities of Alaska cod and pollock roe and frozen Alaska pollock under the Veladis brand. In Q2, 14 posts were made on the Veladis Facebook pages, [www.facebook.com/veladisua/](http://www.facebook.com/veladisua/) (96,000 followers) and Instagram, [www.instagram.com/veladis.ua/](http://www.instagram.com/veladis.ua/) (4,000 followers).

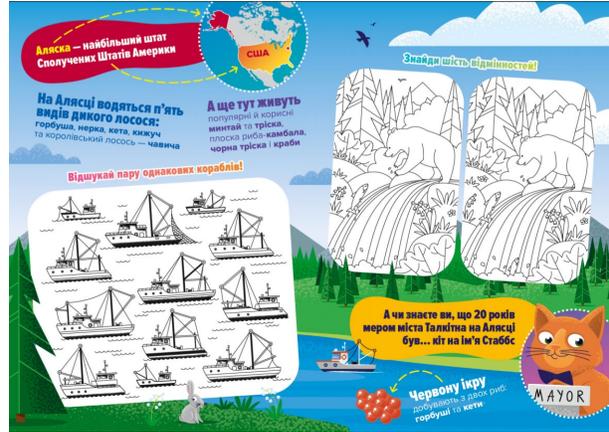
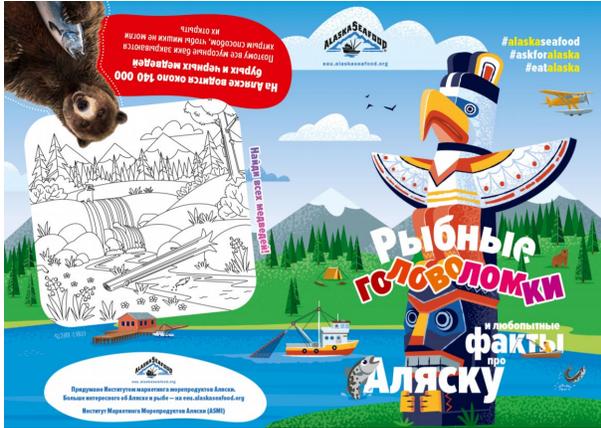
*Kids Handout*

ASMI prepared an entertaining kids handout which included a coloring maze, attention games, and some interesting facts about Alaska.

The handout was created for distribution during ASMI offline events, as well as during online campaigns via social media posts. For example, the handout was posted on the [Cultfood Facebook account](#) (Ukrainian school nutrition campaign) for parents' download during the New Year holidays.

The art files are available upon the request for other OMR to change the language. Pdfs are available here:

- [Games in Russian](#)
- [Games in Ukrainian](#)



**TECHNICAL EDUCATION**

*EasyFish Platform Ukraine – Creative Idea Development*

Following the Easyfish Platform preparatory phase (PeopleLab research, Strategy development, SEO-SERM), ASMI developed the Creative Idea Concept, which determined the visuals for the platform, style of videos and other materials, tone of voice, and other important details.

Creative Idea Development included:

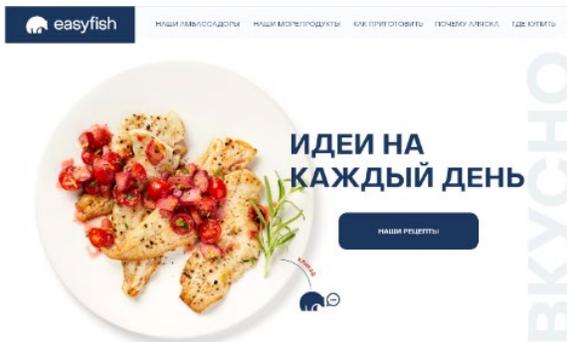
- development of the idea of visual style of content - video, graphics, illustrations;
- detailed scripts for 30 videos (text accents, color scheme, additional graphics, musical accompaniment);
- design of photos, illustrations, infographics.

**Backup:**

Digital Platform <https://www.easyfish.com.ua/>

YouTube <https://www.youtube.com/easyfishua>

Instagram <https://www.instagram.com/easyfish.alaskaseafood/>



*Easyfish Platform Development – Platform Design*

The [Easyfish platform](https://www.easyfish.com.ua/) was developed and launched in December.

The website consists of five parts:

- Ambassadors – KOLs and their recipes.
- About fish - Alaska seafood species and facts with infographics.
- How to cook – ASMI international recipes and newly created videos (basic skills, recipes, festive recipes, themed recipes).
- Why Alaska? - short story on catching process and how fish gets from Alaska to a Ukrainian store.

- Where to buy – list of the Ukrainian stores and brands that sell/contain Alaska fish.



*Easyfish Platform Development – Video Materials Production*

In November and December, ASMI EEU produced a series of new recipe and technical videos, adapted for the Ukrainian market. ASMI invited KOLs - chefs and fish industry professionals (importers, retailers) - to participate in the video content production. In total, 41 videos were shot. As of the end of December 2020, 25 videos were uploaded to ASMI EEU YouTube, the remaining videos are scheduled to be uploaded in Q3.

In total, 41 videos and one trailer and six teasers were produced.

In addition to cooperation with KOL’s (that was outlined in this report earlier), ASMI partnered with four representatives of fish import/ retail companies that participated in the production of technical videos:

**Marina Rusak** (Gelios), videos in the 1st Roe Supermarket in Kyiv

- how to choose salmon roe
- why is Alaska salmon roe superfood
- how to thaw frozen salmon roe
- salmon roe ingredients
- salmon roe additives
- salmon roe packaging
- imitation and counterfeit salmon roe
- difference of salmon roe, depending on salmon species.

**Anastasia Luschik** (UFC importer), videos in the supermarket Don Mare in Kyiv

- Freezing technologies
- How to thaw the fish and how to choose frozen fish
- Packaging of frozen fish
- Packaging of salmon roe
- About Alaska and fish consumption

**Julia-Avrova Orogodnik**, (Fozzy group) videos in Silpo supermarkets

- Freezing technologies
- Easy recipes with Alaska pollock
- Smoked Alaska pollock
- Alaska salmon roe

## Eastern EU

### *CultFood Cooperation*

CultFood (cultfood.info) is a social project that aims to improve food culture for children. Cultfood was founded by the culinary expert Yevhen Klopotenko in 2017. Current directions of the program include "new school nutrition," "new culinary education", "New preschool nutrition". The project is accomplished with support of the Ukraine's first lady Mrs. Zelenska.

In 2017, Yevhen Klopotenko's team received a grant from the Auchan Foundation for Youth to create new recipes for modern meals in Ukrainian schools. The project resulted in the development of 110 unique recipes, which were later included in the Collection (recipe book). In December 2018, the State Service of Ukraine for Food Safety and Consumer Protection granted a permission to implement the program.

In 2020, Yevhen Klopotenko became an ambassador of the Ukrainian education reform and became part of the project "New Culinary Education" which helps to improve the training of cooks in canteens across country. In 2020, ASMI was named an official partner of the CultFood project promoting Alaska pollock as a wholesome dietary and affordable fish for Ukrainian school/kindergarten canteens.



As a result of the cooperation, Alaska pollock is highlighted in CultFood's recipe manuals, that are distributed across Ukraine to schools that have adopted the reform.

Alaska pollock is also highlighted in CultFood's social media throughout 2020/21 in order to inform the audience (school canteen chefs, parents, other) about health benefits of Alaska pollock.

### *Salmon Roe PR Campaign, Ukraine*

The Ukrainian salmon roe market in 2020/21 has been under pressure from counterfeit supply, including chemically "imitated" roe, roe mixed with additives and smuggled roe from Russia. Consumers often prefer open markets and online retail to modern retailers due to the low prices on roe. Such situation creates a noticeable obstacle to sales of legal high quality Alaska salmon roe.

ASMI launched an online PR campaign which worked to educate consumers on how to pick quality roe, importance of consuming quality roe, highlighting best qualities of salmon roe originating from Alaska, and alarming on the availability of questionable roe in the Ukrainian market. Selected articles also included information on roe's health benefits in support of the immune system in the light of COVID-19 crisis. The activity was conducted prior to the New Year holidays, during the most active period of salmon roe sales.

### *SEO-SERM [eeu.alaskaseafood.org](http://eeu.alaskaseafood.org)*

ASMI coordinated the SEO-SERM project for the EEU website [eeu.alaskaseafood.org](http://eeu.alaskaseafood.org) that was launched in FY19/20. The SEO-SERM is expected to increase website visibility on the Internet, improve its credibility and ranking in the search inquiries.

The first stage of SEO-SERM consists of analysis of the target audience, keyword research, search queries analysis and analysis of niche and competitors in Ukraine. The second stage consisted of compiling recommendations for the texts on the website as well as search for bugs and errors on the website and other tips on how to improve the website's performance.

The full task list for SEO-SERM consisted of:

- Analysis of niche and competitors in Ukraine
- Collection of semantics for category pages
- Formation of the structure of site categories
- Copywriting requirements for categories
- Formation of a map of relevance of categories
- Map of redirects from old domains and moving to GSC
- Technical audit of the site before and after launch and verification of edits
- Creating a project to track positions
- Setting up analytics systems (GTM, GA, GSC)
- Forming a content plan for 1-3 months
- Writing a TOR on an article according to a content plan (this will be an ongoing process)

All the suggested improvements were implemented to the website. The results of SEO work can be seen in the ASMI Website Activity Recap section.

### *Translation*

ASMI EEU commissioned the translation of the following materials:

- Seafood Synergy brochure from English to Russian
- Moms and babies brochure from English to Russian
- Salmon roe articles from Russian to English
- Presentation of Easyfish platform from Russian to English
- People Lab consumer research from Russian to English
- Smoking brochure from English to Russian
- Alaska final harvest update from English to Russian
- Small sockeye overview from English to Russian
- Difference between Alaska pollock and Pacific hake from Russian to English

## SOUTH AMERICA

### MARKET UPDATE

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- Total U.S. seafood exports to South America reached **6,630 tons, valued at \$ 23.9 million from January-November of 2020**. Compared to the same period in 2019, both volume and value decreased 23% and 17%, respectively - primarily due to the pandemic affecting the usual trade flow. The same holds for Brazil, as imports of seafood from the U.S. reached **954.9 tons valued at \$ 3.3 million in the same period**: -49% and -57%, respectively.
- Like last quarter, the fierce competition of farmed Chilean salmon has been seen in Brazil, as high inventories were available in Chile this quarter, with frozen salmon quoted below \$3/kg. As a result, Chilean salmon exports to the country managed to remain slightly higher (+1.1%). Nevertheless, positive volume results in 2020 YTD compared to 2019, one of the few origin countries.
- ASMI South America participated in Expo Alimentaria Peru and the SaborUSA Chile virtual trade shows. ASMI engagement focused on resuming and strengthening relations with players in the region and continuing efforts in Peru after the successful pilot project allowing long-term regulation to access imported raw material opened the market. In total, ASMI met with 17 different players during the events and worked with Peruvian trade and Alaska seafood exporters, guiding shipping flatfish, salmon, and pollock samples to the market for processing tests.
- As for Brazil, ASMI South America has dedicated efforts to supporting Alaska seafood exporters registering plants and products with DIPOA/MAPA, updating registrations, and providing general regulatory guidance so companies can successfully meet Brazilian government requirements and efficiently clear shipments. One Alaska company has

benefited from the support, with two labels registered/updated for Alaska keta salmon. Two other exporters have been working with the office to get approvals for surimi and salmon roe.

- In Brazil, ASMI’s trade strategy continued to focus on participation in virtual events and online promotions, such as the Seafood Week digital retail promotion and the International Fish Congress (IFC) Digital Edition, making good use of its social media profiles to continue P.R. efforts.
- Regarding its foodservice strategy, ASMI South America held its first Wild Alaska Seafood Delivery Festival for 30 days during November and December, with ten participating restaurants in São Paulo, Brazil. The festival aimed to grow awareness of Alaska seafood following the gradual reopening of foodservice establishments, focusing on delivery options as the safest and trendiest option during the quarter. **Results were positive, as sales totaled 969 kg, valued at about US\$ 30,000 (BRL 150,000), with an average of 320 dishes sold per week (totaling 1,779 dishes during the campaign).** The campaign saw an ROI of 172%, considering ASMI’s minimal investment in the campaign and the total sold dish value. P.R. results and awareness growth can quickly multiply the ROI.
- Continuing the nutrition-focused promotions in Brazil, ASMI partnered with the hospital nutrition group, Nutrilider, to promote wild Alaska seafood to eight significant São Paulo hospitals. A seminar for twenty people was conducted to educate nutritionists and chefs on Alaska seafood’s wild, natural, sustainable, and nutrition attributes.

## ACTIVITY UPDATE

### RETAIL MERCHANDISING

#### Seafood Week Promotional Campaign Results – Brazil

ASMI South America organized digital retail promotions with Grupo Pão de Açúcar (GPA), one of Brazil's largest retail chains, in September. The campaign included promotions on the chain’s social media channels, marketing emails to their database, inserts in seafood promotional materials and banners on their website and mobile application, and product profiles of Alaska cod, Alaska keta salmon, and Alaska pollock.

Results were provided in October, with estimated sales of \$ 59,496.23 (R\$ 297,481.17) and sales of 4.7 tons of Alaska cod, Alaska keta salmon, and Alaska pollock. These results were fully organic for this campaign, as ASMI has not invested any money as of yet. Moreover, Grupo Pão de Açúcar has already confirmed 2.8 tons of Alaska seafood purchases right after the campaign, also reserving 3.8 tons of the three products for 2021. This a long-term campaign planned to occur until March 2021, with another particular seasonal campaign during Lent (March).

#### Brazil Trade/Retail Outreach

ASMI South America contacted 12 Brazilian trade players during the quarter, of which seven were seafood distributors and five retailers – both large chains and regional physical and e-commerce hybrids.

Regarding distributors, Frumar has long been a supplier of wild Alaska keta salmon, primarily to retailers. After significant changes in their commercial team, ASMI South America strengthened their relationships with new representatives, exchanged market information, shared new materials, and acquired information for 15 new outlets with inventories of Frumar’s brand of Alaska wild salmon from three new chains. Moreover, these conversations bore fruit as Frumar has been more engaged in identifying Alaska origin on their own social media promotions.



## South America

Another highlight is Karne Keijo, a large food importer, and distributor based in Northeastern Brazil, which recently imported about fourteen tons of PMC Alaska keta salmon. ASMI South America conducted a series of training for the product processors and Karne Keijo's sales team. Additionally, ASMI South America developed new in-store signage to support its promotional efforts and educate consumers about the new product. ASMI produced shelf talkers and product stickers, all with Q.R. codes linking to keta salmon recipes and information on the ASMI Brazil website. On a related note, **Noronha Pescados also received a new batch of 60,000 QR code cards for Alaska pollock fillet block portion packages from ASMI, directing consumers to the Alaska pollock landing page.** The APO QR code card includes updates on the art and a new recipe on the back and is estimated to hit retail shelves at the end of the next quarter.



As for retailers, ASMI South America remains in contact with all significant partner retailers. Highlights include Clube da Picanha Bauru, a meat and seafood emporium in Bauru, S.P. with deliveries to multiple nearby cities. The distributor is engaged with ASMI in marketing product competitive advantages. ASMI has provided the distributor with branded delivery bags and recipe cards, which have been used for deliveries of wild Alaska salmon throughout December.

ASMI continues to hold meetings with Grupo Pão de Açúcar and distributor Noronha Pescados, planning demand and digital campaign propositions for the upcoming Lent promotional period for larger retail chains.

For the next quarter, ASMI South America will focus on digital promotions, aiming to add other large-scale chains to the effort. Conversations with Carrefour and Swift will be resumed.

### WEBSITE

The ASMI Brazil-focused website provides consumer-directed information such as nutrition facts, easy recipes, and selling and eating Alaska seafood locally. Trade-directed information includes a suppliers' directory, a form to request information and POS materials, and up-to-date information on ASMI's activities in the market, such as trade seminars, events, and promotions. A customized social media tool facilitates direct sharing to Facebook, Twitter, and Facebook and WhatsApp messenger apps. ASMI manages its landing page for the Genuine Alaska Pollock, featuring information on the species, differences, and competitive advantages of the Genuine APO vs. other origin pollock, recipes, and outlets where consumers can buy the product in Brazil. The website has focused divisions for trade/importers (B2B) and consumer-oriented (B2C).



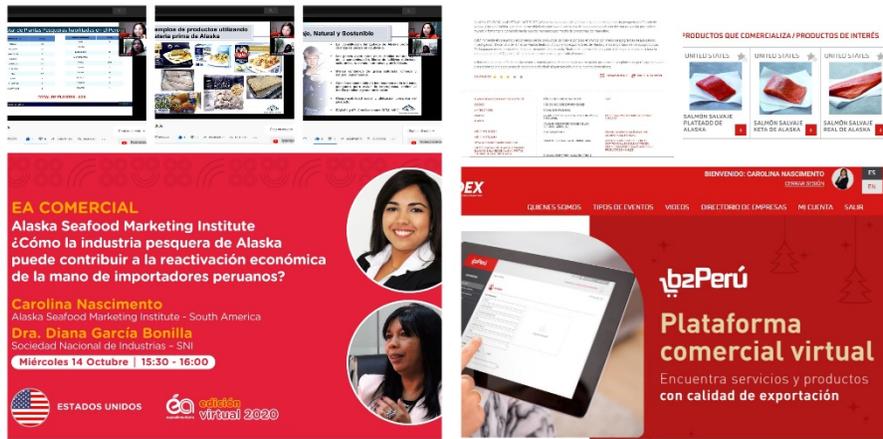
### TRADE PUBLIC RELATIONS

#### *South America Trade Shows – Expo Alimentaria Peru*

ASMI exhibited at the ExpoAlimentaria Peru: Virtual Trade Show held from September 30 to November 15, 2020. The event offered a virtual marketplace, where ASMI had a full profile promoting wild Alaska seafood species. ASMI South America took the opportunity to identify seven leads interested in getting to know South America's program to expand operations to other countries in the region. Below is a list of the companies:

Agropecuaria Mantaro	Peru
Alpes Chiclayo SAC	Peru
Athena F.C. / Swift Argentina	Argentina
CI Piscicola Botero SA	Colombia
Compañía de Indias	Uruguay
Mercurin SA de CV	Mexico
UltraFresh	Peru

As part of ASMI’s participation, OMR Carolina Nascimento, in cooperation with Diana García from Sociedad Nacional de Industrias - Peru (SNI), conducted a 30-minute presentation Alaska seafood industry can contribute to the economic reactivation in collaboration with Peruvian importers on October 14. The video has 101 views, and it is available on YouTube: <https://www.youtube.com/watch?v=3eEmXi2gAZo&t=159s>.



*South America Trade Shows – SaborUSA Chile*

ASMI South America participated in the SaborUSA Chile Virtual Trade Event organized by the FAS Santiago Office in Chile. This event was designed to promote USA foods, including consumer-ready products, private labels, and ingredients. The event was attended by food distributors, processors, retailers, hotels, restaurants, and other key foodservice companies. The show gathered 19 exhibitors and 54 visiting companies.

As part of its participation, ASMI South America attended three one-on-one meetings offered by organizers:

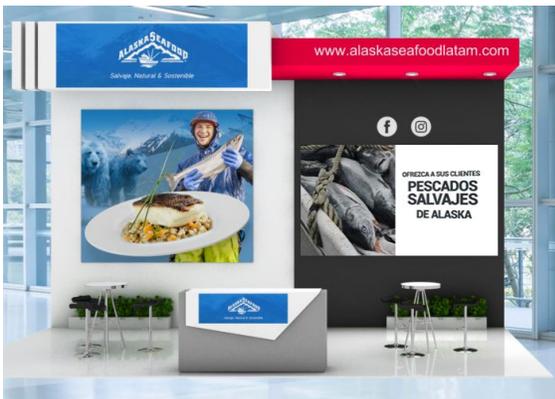
Chilemprende	Chile
Grupo Acuatica	Chile
Grupo Gastronómico	Chile

Additionally, seven potential leads were identified and contacted by the OMR during the event:

Chile Alimentos, JBS - Chile	Chile
Grupo Los Robles	Chile
Cencosud Chile	Chile
Gil's Gourmet	Chile
Chilean Supermarket Association (ASACH)	Chile
Friofood S.A	Chile
Unimarc	Chile

## South America

Meetings with the identified leads will be conducted in 2021.



### *South America Trade Shows – Expo Antad & Alimentaria Mexico*

Expo Antad & Alimentaria Mexico Virtual Trade Show 2020 is focused on the food and beverage industry, from distribution to the retail and foodservice sectors. Due to several technical problems, show organizers decided to extend the event duration until February 2021. ASMI South America's meetings and video placement will take place in January-February 2021. Show organizers have already posted ASMI's video on their social media channels and provided the OMR with contact lists to start networking efforts.

### *Seafood Brasil Magazine – Brazil*

Seafood Brasil is a quarterly seafood magazine launched in May 2013 with a circulation of about 4,500 printed copies (plus 6k digital copies to South American contacts). The magazine capitalizes on Brazil's growing seafood market and is the only seafood-focused business publication in the country. The publication is aimed at the seafood supply chain, including trade, retail, and food service.

The 36th edition, published in December 2020, provides an overview of the whitefish fillet market and the rise of tilapia as a highly competitive product. The article also mentions the sales of Alaska pollock in the Brazilian market compared to other imported products such as Argentine Hake and Vietnamese Pangasius. ASMI OMR, Carolina Nascimento, gave an interview in which she describes ASMI's efforts to promote Alaska pollock in Brazil and the species' global market. OMR has placed one ad on the back cover with a new year card containing a Q.R. code linking to the ASMI Brasil website.



### *International Fish Congress (IFC) – Digital Edition (Brazil)*

The 2020 edition of IFC - International Fish Congress & Fish Expo Brasil took place entirely online and featured more than 30 seminars and discussions about the seafood production chain (industry, market, and investors). The event was attended by government officials, producers from Asia, Europe, and Latin America, trade members (retail and foodservice), and seafood industry professionals with Brazilian and foreign guests. The Congress also had virtual booths, discussions, research presentations, and networking.

This year, ASMI was a silver sponsor, and the Alaska Seafood logo was widely publicized during the three days of the event. A 2-minute-video about the Alaska fishing industry and its values of sustainability and quality was broadcasted during breaks.

## South America

### Podcasts – Brazil

ASMI South America is developing podcasts to be showcased during the next quarter to reach the entire Brazilian seafood chain on the audio platforms Spotify and SoundCloud. These productions will focus on wild and natural sourcing, Alaska as a sustainability model, nutritional benefits, the Alaska seafood industry, and its trade numbers. The OMR seeks to interact with different listeners to create more interest and increase engagement on social networks. It was necessary to delay this activity to the next quarter due to a change of strategy in terms of content and production for the Brazilian market.

### TRADE SERVICING

#### Trade Servicing Meetings – South America and Mexico

ASMI South America sought to strengthen relationships with new players in Chile, Mexico, and Peru this quarter. A consistent database of direct seafood processors was achieved, in which 12 new companies (six in Chile, five in Mexico, one in Peru) expressed their interest in participating in ASMI activities and getting to know Alaska's versatility Seafood products. ASMI's participation in the upcoming trade shows in Peru, Mexico and Chile will be an excellent opportunity to continue efforts towards the organization of an Alaska Seafood South America Trade Webinar in February.

New Companies in Chile	New Companies in Mexico	New Companies in Peru
K y C Seafoods Ltda	Land and sea	Marinasol
Mar del Norte S.A	Gastrosophia	
Fish Market Ltda.	Mexideli S.A	
Sociedad Pesquera Galeb Ltda.	Pacifico Aquaculture	
Productora del Mar Ltda.	Merco	
Procesadora de Alimentos Omega Seafoods Ltda.		

### FOODSERVICE PROMOTIONS

#### Live Food Service Promotion Seminar

As part of the promotional campaign for the Wild Alaska Seafood Delivery Festival, ASMI OMR Carolina Nascimento hosted a live seminar with guests Marcelo Fernandes, owner of the Gastronomía MF group, and João Gentile, owner of the Praça São Lourenço restaurant. The webinar, which was broadcasted on Alaska Seafood Brazil's YouTube and Facebook platforms, aimed to discuss gastronomy and share with the public the experience of getting to know Alaska and its seafood industry.

Both guests participated in the Cochran Mission, carried out by the FAS and ASMI in August 2019. Mr. Fernandes and Mr. Gentile own three of the restaurants (Attimo Per Quattro, Kinoshita and Praça São Lourenço) that participated in the Festival.

The broadcast had an average audience of 38 people and reached 18,000 users on Facebook, and resulted in 15 new followers on YouTube. Below are the results:

Date	Subject	Guests	Facebook Performance	Youtube Performance
November 25, 2020	Gastronomy and the Alaska seafood industry	Marcelo Fernandes and João Paulo Gentile	- 18,717 people reached - 90 reactions, comments, likes, and shares - 993 post clicks	- 96 impressions - 144 views

*Hospital Nutrition Seminar*

ASMI, in partnership with Nutrilider group and nutritionist Andrea Esquivel, organized a technical seminar. The seminar, hosted for nutritionists and health professionals, included a tasting session featuring Wild Alaska keta salmon, Alaska cod, and Alaska pollock and took place at Praça São Lourenço restaurant. The event attended by eight significant hospitals in São Paulo (18 guests) aimed to present the nutritional benefits of including Alaska seafood in the patient’s diet.

Institution
Instituto Central de HCFMUSP
Instituto da Criança e CANUT – HCFMUSP
Coordenadoria de Atividades Nutrição CANUT – HCFMUSP
Hospital Israelita Albert Einstein
Hospital Sírio Libanês
Hospital Cruz Azul SP
Hospital São Camilo Granja Viana
Hospital Unimed Sorocaba
Hospital Prevent Senior
NutriLider

This event was part of the initiatives to expand Alaska seafood products to the institutional meals sector, such as hospitals and health centers, and present the species' versatility, functionality, and gastronomic performance, associated with the sustainable and natural aspects.

Banners and products were displayed. The guests also received promotional materials, such as nutrition and fact sheets. After the event, thermal bags with fillet samples were sent to the participating hospitals.

*Wild Alaska Seafood Delivery Festival - São Paulo, Brazil*

The Wild Alaska Seafood Delivery Festival was created with the purpose of supporting importers and distributors, increasing sales of Alaska seafood products for foodservice (which includes partner restaurants and new restaurants), while generating important public relations results. It was also thought to be a re-launching pad for the foodservice program and to wildly promote the Alaska Seafood brand, showing restaurants the power of displaying Alaska Seafood on the menu. The promotion was strategic to the Brazil program to reactivate restaurants that had stopped sourcing Alaska seafood during the pandemic and/or the absence of an active foodservice program in the country.



During the organization stage, ASMI South America connected with 167 restaurants to present the festival, reactivate connections, profile new leads, offer support and Alaska seafood samples, marketing material, and present the advantages of partnering with ASMI.

Ten restaurants (Attimo, Gon-Gon Sushi, Icone Gastrorock, Jacaranda, La Pergoleta, Kinoshita, Le Manjue, Praça São Lourenço, Sevillano and Sushi Nami) participated in the festival during its entire duration. Five are newcomers, one returning, and four are existing partners. Two are featured on the Michelin Guide (one, Kinoshita, holds one star).

Twenty-seven dishes featuring Alaska cod (3), Alaska pollock (4), Alaska keta salmon (11), Alaska sockeye salmon (9), and Alaska sablefish (1), from a variety of cuisines (contemporary, fusion, Italian, Japanese, organic, Brazilian and Spanish – showcasing how versatile Alaska seafood can be), were available for delivery, take-out, and even for consumption at the restaurants. In total, 969 kg of Alaska seafood sold by distributors to participants; 1,779 dishes were sold, and BRL 153,406

## South America

(about USD 30,000) worth in restaurant sales. The ROI is at 172%, considering only ASMI’s investment in the campaign (about USD 11,000) and sold dish value.



“Ask for Wild” was the motto of the campaign. ASMI showcased all participating restaurants on an exclusive landing page created for the festival ([www.deliveryselvagem.com.br](http://www.deliveryselvagem.com.br)), developed a promotional video starring Nanook (the Alaska brown bear) delivering dishes, developed several promotional materials, as branded delivery bags (with a Q.R. code that takes consumers to ASMI Brazil website) and stickers to accompany orders, and magnetic cup coasters (developed with beautiful Alaska scenery and fishing photos from the 2020 Photo Contest organized by the ASMI Communications team, which were used as giveaways, sent along with each order), invested in public relations initiatives, including hiring a P.R. agency, shipping dishes to influencers, contracting promotional campaigns with the gastronomy platform Foodpass, and airing a series of ads at Alpha FM radio station. ASMI also heavily invested in social media promotions exclusively dedicated to the event and hired a professional food photographer, acquiring a database of 130 new photos of Alaska seafood plates.

Twenty-one influencers were selected to receive a personalized delivery from one of the restaurants, resulting in over 50 posts and stories on social media and three future meetings with business owners and foodservice consultants. The total earned media value was over \$80,000.

The promotion conducted with Foodpass, a web platform for foodies, chefs, business owners, among other foodservice players and gastronomy lovers, resulted in 18 posts and stories on their Facebook and Instagram profiles, four newsletters, and three website articles, which reached over 548,000 impressions with almost 5,000 clicks – in total reaching more than 528,000 qualified people. The festival was also advertised on a leading radio in Sao Paulo, Alpha FM, for four days. The average number of unique listeners per day was almost 340,000 people, a total of over 1.35 million people in the audience during the campaign. Combined paid promotions on third-party channels reached almost 1.9 million people during the 30 days of the festival.

### *Production of new recipes – Chef Carlos Siffert*

To expand ASMI’s recipe library, chef Carlos Siffert (2019 Cochran participant) was hired to create new dishes that are easy to reproduce for daily meals. For the production, a photographer and a videographer were also hired. Developed videos, photos, and recipes will be widely promoted on social media channels and used in new marketing materials.

Eight dishes were created featuring Alaska keta and sockeye salmon, Alaska pollock, and Alaska cod. Below is a list of the recipes:

Recipe	Specie
Alaska Pollock Fish Cakes	Alaska Pollock (fillet blocks)
Crispy Pollock Sticks	Alaska Pollock (fillet blocks)
Pollock with spicy sauce	Alaska Pollock (fillet blocks)
Salmon fillets with puff pastry	Keta Salmon
Raw salmon with avocado and pepper (appetizer)	Keta Salmon

## South America

Raw cured cod with grapefruit (appetizer)	Alaska Cod
Grilled Salmon fillets with chives and paprika	Sockeye Salmon
Cured salmon with fennel	Sockeye Salmon

### *Foodservice Development – Brazil*

During this quarter, prospects increased by 70%, reaching 155 new contacts, generating 136 leads, 28 of them profiled and introduced to distributors. ASMI South America held 27 meetings with Brazilian restaurants from October to December 2020.

Meetings with foodservice players		
Al Mare	Aizomê	Praça São Lourenço
Bagatelle	Attimo per quattro	Sevillano Bistro
Mangaba	Duas Terezas	Sushi Nami
Canvas Bar & Restaurante	Extasia	Zucco Restaurante
Ecully	Icone Gastro Bar	Ici Bistrô
Gajos Bar e Cozinha Ibérica	Jacarandá	Hiroshi
Aguzzo	Kinoshita	Gon Gon Sushi
Kosushi (Itaim Bibi)	La Pergoletta	
Mawari Sushi	Le Manjue Bistrô	
Sassá Sushi (Jardins)	Nagayama	

The foodservice development had a significant focus on the recruitment of participants for the festival. As a result of these efforts, nine restaurants received samples (Mangaba, Al Mare, Extasia, Ici Bistro, Icone, Kobudai, Jacarandá, Attimo, and Gon Gon Sushi), three are testing menus (Al Mare and Ici Bistro and Extasia). Five included or will include Alaska seafood on their menus (Icone, Jacarandá, Attimo, Gon Gon Sushi, Kobudai, Mangaba).

Moreover, ASMI South America has trained its first restaurant staff team since the beginning of the pandemic, Kinoshita. Twenty staff members (kitchen and table service) were provided with information about species and handling and receiving frozen fish and sales pitch.

ASMI South America is working to reach foodservice businesses interested in improving their menus and operations by using frozen seafood, per its wild, natural and sustainable attributes and competitive advantages of long shelf life and nearly zero waste. Follow up with leads developed early in 2020 includes Gate Group, to whom ASMI is presenting Alaska Seafood as an alternative protein to commercial flight menus. Hilton São Paulo Hotel tested Alaska salmon and cod samples and is likely to introduce both species on its menu. ASMI is also supporting the restaurant to launch the new menu during a special event at three of the chain hotels in Rio de Janeiro, Fortaleza, and São Paulo, potentially during the 3rd quarter. Alaska seafood will be on the menu of a brand-new restaurant (Mangaba), the first from Grupo 55+ holding, that owns 11 restaurants - including international brands as Bagatelle and Josephine.

Ninety-four kilos of wild Alaska seafood samples were distributed for testing, resulting in sixteen restaurants calling out wild Alaska seafood on their menus. During the quarter, OMR has also seen a 16% increase in inbound food service leads from ASMI Brazil Social Media pages.

### *50 Best Restaurants Landing Page*

ASMI South America developed a gastronomy-focused [landing page](#) to promote Alaska seafood during the Recovery Summit organized by the 50 Best Restaurants, a global initiative sponsored by ASMI. Exploring beautiful Alaska and Alaska seafood imagery and videos, the page highlights Alaska seafood species, the wild, natural and sustainable attributes, exemplifies the versatility and applications of products in the high gastronomy worldwide, offers consumer trend data on seafood demand and all ASMI international offices' contact information to foodservice visitors interested in learning more and sourcing Alaska seafood.

## SOUTHEAST ASIA

### MARKET UPDATE

COVID-19 continued to impact ASEAN during the quarter negatively. Non-residential activity (visits to groceries and pharmacies, retail and recreation facilities, parks, transit stations, and workplaces) in most regional countries improved from May through mid-December. Still, it declined sharply in late December due to new outbreaks in every regional country. Broader economic impacts have been substantial, particularly in Thailand, the Philippines, Malaysia, and Singapore, which rely heavily on tourism and exports. The availability of vaccines in late December, although limited, has improved the outlook for 2021.

Regional seafood trends continued on the same track as Q1. Online sales continued to grow, despite the higher competition, but retail trade recovered somewhat as pandemic-related restrictions were eased. HRI trade, particularly online delivery services, strengthened slightly during Q2, but the hotel sector's tourism remains devastated by the pandemic. Alaska seafood's regional image and awareness continued to grow with increased promotion, and local importers and processors focus on domestic consumers seeking to eat healthier with wild-caught seafood. However, lower-priced, farm-raised products continue to dominate the market.

### ACTIVITY UPDATE

#### TRADE SERVICING/EVENTS

During Q2, ASMI's SEA team worked on several regional Trade Service activities:

- Communicated via meetings, calls, and emails with key trade contacts and FAS officials in Singapore, Malaysia, Thailand, the Philippines, Indonesia, and Vietnam. Details of critical meetings are in the country sections below. A list of contacts is shown in the Trade Meetings section at the end of this report.
- Continued to work closely with our social media contractor in Bangkok to boost the effectiveness of ASMI SEA's website and Facebook pages in English, Thai, and Vietnamese languages. The new local-language Facebook pages for Indonesia and Malaysia are generating interest. Details are in the Social Media section later in the report.
- Completed translations and printing of a new Thai-language cookbook with ten local and international recipes.
- Completed the Vietnamese translation of multiple recipes and publications, including the Rockfish Fact Sheet, Salmon Buyer's Guide, Whitefish Buyer's Guide, Healthy Moms & Babies, RFM Certification, and Chain of Custody Process.

#### Thai Language Recipe Book

Following are example pages.



### *Sample shipment of single-frozen pollock fillets*

The ASMI SEA team coordinated with the American Seafoods offices in the U.S., Japan, and Korea. With Bangkok Seafood Co. Ltd. to arrange imports of single-frozen Alaska pollock samples to provide to processors, retailers, and HRI outlets in Thailand. After the pieces arrived, ASMI staff also arranged with Bangkok Seafood to block and distribute products to individual HRI outlets and chefs.



## **TRADE SHOWS**

### *Seafood Expo, Singapore & Seafood Export Marketplace Conference*

Seafood Expo, Singapore and a related Seafood Export Marketplace Conference were planned for November 18-20. Prior to its cancellation on August 12 due to COVID-19, ASMI SEA staff worked with Susan Marks, ASMI Sustainability Director, to prepare a paper for presentation at the conference titled “*Sustainability and Eco-Certification to Meet Consumer Needs and Build Market Success for Alaska Seafood in Asia*”. Hopefully, the show and conference will be rescheduled for 2021.

### *ThaiFex-Anuga Asia, May 25 – 29, 2021*

ThaiFex-Anuga Asia, May 25 – 29, 2021 is planned for IMPACT Center, Bangkok. ASMI SEA has reserved a large booth. ASMI industry members may attend the show if Thailand’s COVID-19 quarantine measures are lifted before the event.

### *Food & Hotel Asia, Singapore, March 2 - 5, 2021*

Food & Hotel Asia, Singapore was rescheduled for March 2 – 5, 2021 but has since been postponed to March 28 – 31, 2022. ASMI SEA originally reserved a 27 square meter booth for the 2020 event and can roll the booth deposit forward again.

## **RETAIL MERCHANDISING**

### *Rimping Supermarket, Chiang Mai*

This promotion was initially scheduled for October 1 - December 31, but due to COVID restrictions, it was rescheduled for December 1 – February 28. ASMI is partnering with Rimping, FAS Thailand, and other cooperators for the three-month promotion featuring various U.S. foods. Alaska sockeye salmon, black cod, and sole are being supplied by Gourmet One and Bangkok Seafood (Alaska King). The promotion is taking place through online platforms (Facebook, Line, YouTube videos, and a cooking variety show); in-store signage, videos, tastings, demos; brochures and giveaway items; and a giant outdoor billboard at a significant Chiang Mai intersection. ASMI SEA staff traveled to Chiang Mai September 12-14 and again November 23-24 to meet Rimping’s staff and survey all seven outlets (Nawarat, Meechok, Nim Daily, Kad Farang, Promenada, Mali, and Maya) for the promotion.



**Central Food Hall Supermarket, Bangkok, November 23 – December 8**

ASMI SEA partnered with FAS Thailand, other U.S. cooperators, and Central Food Hall Supermarkets in a promotion-themed “Taste of USA 2020.” ASMI featured Alaska sockeye, black cod, pollock, and yellowfin sole. Central Food Hall is the leading premium supermarket chain in Thailand, operated by Central Food Retail Co. Ltd. and located in Central Department Store branches. The promotion was held at Central Food Hall’s four major outlets in Bangkok: Chidlom and Central World branches November 23-30, and BangNa and Eastville branches December 1-8, for a total of 32 promotion days (four stores, eight days per store). ASMI coordinated with Mine Idea Co. to hire three senior chefs and two amateur chefs for cooking demonstrations during weekends at the four branches. Each chef developed two recipes using Alaska seafood. ASMI retained the rights to all of the recipes. Promotion staff were hired for sampling and other support each day. Food influencers were also retained to promote the events. Consumers were given free Alaska Seafood cooler bags with purchases of 500 Baht or more.



ASMI SEA is also providing cooperative promotion funding to Bangkok Seafood, Meng Kee, and Gourmet One Co. in Thailand and The Alaska Guys (TAG) in Singapore to support their social media and other retail promotion activities.

**CHEF SEMINARS**

ASMI SEA staff collaborated with Mine Idea Co. to develop two chef training programs to start in Q3 and Q4, provided there are no pandemic-related restrictions. The first is an Alaska Seafood Master Chef Training activity to be held March 14-16 or March 28-30 (three days, two nights) at a five-star resort in Hua-Hin, a popular resort area hours from Bangkok. The event will include ten culinary professors from chef training programs at five universities and culinary institutes. A guest chef who is familiar with Alaska seafood will lead the program. Local suppliers and other technical experts will also be invited to join. The following agenda is proposed. Other details are being finalized.

- Alaska Seafood Introduction
- 2021 Alaska Seafood Culinary School Project

## SE Asia

- Why Buy Alaska Seafood?
- Alaska Seafood Activity #1: Tasting and create menus
- Cooking Competition
- Welcome Dinner: Alaska Seafood set menu
- Alaska Seafood Cooking Demonstrations by guest chef
- Alaska Seafood Activity #2: Alaska Seafood Cooking Competition
- Farewell Dinner

After the culinary professors have completed the Alaska Seafood Master Chef training, ASMI will work with them on the second activity to conduct amateur chef training at their universities and culinary schools. Those trainings are currently planned for late April.

## HRI PROMOTIONS

SEA's HRI activities are currently focused mainly on Thailand.

### *Gourmet Foodie Festival, October 28 – November 1*

ASMI collaborated with Gourmet & Cuisine to host this event at Central Festival EastVille, Bangkok, a concept shopping mall with 200+ stores and 100+ restaurants catering to Thai, middle class and high-end consumers. Three importer-distributors (Meng Kee, Bangkok Seafood, and Lucky Union) displayed and sold Alaska products at the event, including salmon, pollock, black cod, sole, and POP, and Alaska pollock surimi. Selected chefs demonstrated the preparation and cooking of Alaska seafood and offered samples during the five-day promotion. Four selected restaurants also featured Alaska seafood products in their booths during the event and in their restaurants from November 1 through December 31. More than 20 media partners and influencers attended the opening ceremony and covered the five-day event.



### *'Took Lae Dee' Restaurant Co.*

'Took Lae Dee' Restaurant Co. ('cheap & good' in Thai) is a chain of 23 mid-range, family-style diners located within Foodland Supermarket branches (23 stores nationwide). ASMI SEA collaborates with Natural Alaska Seafood Co. and TLD's Chef Leonardo to test and launch several new menu items featuring Alaska seafood. The launch and promotions have been delayed to Q3 due to pandemic issues and internal logistical preparations at TLD.

### *Pattaya HRI Reception*

ASMI SEA staff also traveled to Pattaya, a famous beach resort area southeast of Bangkok, to meet with hotels participating in the Gourmet Foodie Festival and other HRI outlets. Our objective is to host a reception in Q3 or Q4 for about 100 leading chefs, food and beverage managers, media personnel, and other HRI players in the Pattaya region.

## SE Asia

Feedback from the local trade has been very positive, so we will continue planning the event and hold it after pandemic restrictions have eased.