

To: ASMI Board of Directors

FROM: Alexa Tonkovich, International Marketing Program Director

RE: International Program report

This report covers activities occurring in the third and fourth quarter of FY 14 (January 2014 – June 2014) as well as cumulative information about our program year, and provides a general update of International Program progress.

The FY 15/16 Unified Export Strategy grant application was completed and submitted to the Foreign Agricultural Service before the deadline. ASMI's funding request was on par with FY 14. ASMI is participating in several Global Based Initiatives (GBI) with other cooperator groups, notably an Africa based GBI and a GBI focused on sustainability outreach in the EU.

TRADE SHOWS

Seafood Expo Global took place May 6-8. ASMI took advantage of the additional 132 square meters of space adjacent to the existing Alaska Pavilion and created a pavilion that benefitted our 20 co-exhibitors and all other members of the Alaska Seafood industry attending the show. More than \$500 million in sales were projected as a result of the show.

ASMI exhibited at Food and Hotel Asia in Singapore (April 8-11, 2014). ASMI took 50 qualified trade leads and \$1.5 million in sales were projected as a result of the show.



US Ambassador to Singapore

In addition to regularly scheduled trade shows, ASMI will also attend Asia Food Expo (AFEX) in the Philippines in September.

China

Summary of Activities/Results:

Consumer PR/Advertising: ASMI China's main focus is using consumer pr/advertising to educate consumers by communicating the healthy and nutritional benefits of Alaska seafood. This includes television, radio, newspaper/magazine and billboards.

- *7 million readers targeted with ASMI advertising.*

Retail Merchandising: ASMI China worked with major retailers across Mainland China and Hong Kong.

- *December through April American Food Festival was held at 130 Big Pizza outlets in China promoting pollock.*
- *An Alaska seafood promotion took place with 44 Park N Shop outlets in mainland China December 15-January 15.*

Trade Shows/Mission: ASMI China participates in select trade shows across China each year and leads US trade missions abroad. ASMI China participated in several trade shows and events including:

- *SIAL China is an international food and beverage show in Shanghai held annually. SIAL 2014 featured over 2,400 exhibitors from 90 countries and regions. It included 8 exhibition halls with more than 60 pavilions. More than 45,000 visitors attended.*



- *The ASMI China team had a booth featuring head-on seafood: halibut, salmon, Pacific cod, black cod, pollock, flathead sole, red king crab and Dungeness crab. It also featured fillets of king and sockeye salmon, pollock and cod, as well as snow crab clusters. The booth also served smoked sockeye and king salmon samples served on rice crackers, pollock and chum salmon roe served on white rice and steamed Dungeness crab.*
- *The ASMI team also attended a reception hosted by the Agricultural Trade Office at the Wyndham Grand Hotel. Welcoming remarks were given by Administrator Karsting and Agricultural Minister Counselor Sindelar.*

Foodservice Promotions: With more than 10,000 star-rated hotels in China and a rapidly expanding foodservice sector, ASMI conducts promotions with key chains.

Chef Seminars/Training School Program: ASMI works to educate chefs across China in how to prepare frozen Alaska seafood.

- *ASMI assisted in an in-bound trip for 23 hotel and restaurant food buyers from the Zhejiang Cuisine Association June 11-13 in Seattle. ASMI arranged a luncheon and several industry meetings for the Alaska seafood companies located in the Seattle area.*

Japan

Summary of Activity/Results:

Consumer Promotion, PR and Advertising: ASMI Japan ensures the maximum possible ROI for Alaska seafood by obtaining as much free coverage as possible on a PR basis, including interviews with ASMI headquarters and ASMI Japan staff, targeting consumers through magazines and other traditional media as well as online.

- ***Consumer Event at Westin Sendai (February 2014)***
In cooperation with an Alaska Seafood Fair at Coop Miyagi, ASMI Japan arranged and conducted a consumer event at Westin Sendai on February 27th. Other industry participants included Ocean Beauty, Sento Gyorui (seafood wholesaler), Co-Op Miyagi, Icicle Seafoods and the U.S. Embassy.
- ***Tie up With HOTERES Magazine***
ASMI Japan will conduct a media tie up starting in March 2014 with HOTERES, published by Ohta Publication Co, Ltd. This is one of the most influential magazines among the HRI, and read by other journalists as well. HOTERES features interviews with HRI executives, analyses of trends in the hotel and culinary worlds, and introductions of new restaurants and accommodations in Japan and abroad. This activity consists of a series of three monthly two-page advertorials about Alaska seafood.
- ***Free PR opportunity with Eiyo to Ryori (Nutrition and Cookery)***
During the month of March, ASMI Japan set up media interview between ASMI Japan and the nutrition and food magazine "Eiyo to Ryori". "Eiyo to Ryouri is 80 year old magazine with the philosophy "Eat properly and stay healthy." Alaska seafood and ASMI Japan's activity were introduced in their "Food's Field Trip" pages.
- ***ASMI Sustainability Consumer Campaign Mobile App, Campaign Website***
To coincide with the sustainability sticker campaign, ASMI Japan produced original mobile apps for iOS and Android, as well as a campaign website. All of these promote Alaska seafood as natural and sustainable.
- ***Collaboration Seminar with Asahi Culture Center***
Ms. Michiko Kanai, former Editor in Chief of culinary magazine "Cuisine Kingdom" and participant of last summer's media trip, teaches classes at the Asahi Culture Center, an educational facility where people can take classes about their interests, such as food, travel, art, literature, language etc. ASMI Japan will provide Alaska seafood samples and educational materials for two events, allowing participants to taste authentic Alaska seafood and learn about the origin, natural and sustainable aspects of Alaska seafood.

Retail Merchandising: ASMI will continue to support major Alaska seafood importers for all species into Japan while jointly promoting Alaska salmon and roe products by providing ASMI's origin identifiers at the retail level. If necessary, ASMI will also support trade partners with pre-printed ASMI logo stickers or with design issues to incorporate logo on retail product packages to ensure the authenticity of product origin.

- ***Alaska Seafood Fair at Co-Op Miyagi***

Coop Miyagi, whose sales surpass 100 billion yen per year, has strong relationships with its union members through its stores and delivery network, and a long, stable history with Alaska seafood suppliers. ASMI Japan is conducting the following joint promotions:

- *(1) Alaska Seafood Fair at Coop Miyagi stores for sockeye sujiko, Pacific cod and black cod by providing POS with the ASMI logo (posters, signs and campaign stickers)*
- *(2) Coop Miyagi union members who spend at least 1,000 yen (\$10) on any combination of participating Alaska Seafood Fair items (sockeye sujiko, Pacific cod and black cod) during the campaign period can enter to win one of 50 tickets for two (100 guests total) to an Alaska seafood seminar and lunch buffet event at Westin Hotel Sendai on February 27th.*
- *ASMI Japan worked with food specialist Ms. Mami Nakamoto to develop approximately 10 recipes for canned pink salmon. ASMI intends to present these recipes to consumers and supermarket chains (in the form of recipe cards or booklets) and to the HRI sector.*

Trade PR and Advertisement ASMI continues to collaborate with existing Japanese seafood trade groups, trade media companies and industry associations to facilitate informational exchanges within different trade sectors and regions in Japan. ASMI will also work closely with the U.S. Embassy and the Alaska State Office in Japan to host trade-targeted PR events. These PR efforts include regular meetings with trade, receptions, etc., and will improve trade relations and enhance product placement by reminding the trade of the distinct advantages of Alaska seafood products.

- *ASMI Japan secured an opportunity for a 5-column color ad in the January 27th Alaska Pollock Seattle A Season special issue put out by the seafood industry newspaper Suisan Times.*

Trade Shows:

- *From February 12th to 14th at the Tokyo Big Sight, ASMI Japan participated with over four booth spaces in the ATO's USA Pavilion at the Supermarket Trade Show, (<http://www.smts.jp/english/>) organized by the New Supermarket Association of Japan.*
- *Every two years, Tokai Denpun holds a "Food Festival" trade show for its customers, clients and the food industry, and it has become one of the most influential surimi trade shows in Japan. ASMI Japan jointly operated one booth (free of charge) with GAPP to promote Alaska pollock surimi to Tokai Denpun itself and trade show attendees (2400 people, 50-60% of whom are in the neri industry including producers who use surimi, including Alaska pollock surimi).*
- *ASMI Japan exhibited at the Seafood Show Osaka on February 20th and 21st at the Asia and Pacific Trade Center Hall. ASMI values this trade show as an important tool to connect with members of the seafood industry in western Japan.*

Seafood Buyers Ed Program: In order to maintain and develop 'sustainable' trade relationships with existing and younger generations in the Japanese seafood industry, ASMI provides year-round Alaska seafood information services in academic and hands-on forums. A principal focus is on ASMI's sustainability platform. ASMI will arrange for prominent sustainability experts from various sectors, both public and private, from

the US and Japan, to speak with and educate industry members. ASMI will also work with US seafood industry organizations to co-sponsor trade seminars and workshops.

- *ASMI Japan held 82 trade meetings from October 2013 through March 2014.*

Foodservice Promotions In addition to the already popular seafood items among chefs, like salmon, crab, sablefish and roe, ASMI develops new venues for underutilized species or relatively new-to-market products to be introduced and experimented with by HRI users. Such venues include restaurant menu contests and a pilot menu promotion at a renowned hotel/restaurant.

- *ASMI Japan successfully convinced Pronto (a foodservice company that runs over 240 cafes and bars in many regions of Japan) to switch its fish 'n chips ingredients to Alaska origin “ready to warm-up fried Alaska pollock” starting December 26th, for at least six months. To promote the switch, ASMI Japan successfully persuaded Pronto to put the Alaska seafood logo on its menu to inform customers that the fish comes from Alaska.*
- *Following the fourth session with the Japanese Chef Association in the Kansai region ASMI Japan carried out a fifth workshop for the chefs to use Alaska seafood and educate its members about Alaska seafood.*

Western EU (France and Belgium)

The implementation of new EU regulations on Dec 13th require that a retail pack list the fishing gear used in harvest (seine or gillnet or troll.) Alaska processors may have problems in differentiating seine and gillnet-caught salmon. The major re-processors such as Findus and the French importers association are lobbying against a requirement to list the “first freezing date.”

Consumer PR/Advertising: Continued advertising in magazines for women targeting housewives under 50 with high to average income levels, ads focus on the wide variety of AK seafood available, its attributes, sustainability and responsible fisheries management. ASMI undertakes consumer PR efforts in order to maximize the consumer budget.

- *ASMI placed one insertion featuring Alaska species in Terra Eco, an eco-focused magazine with a circulation of 100,000. Before the magazine was published the industry and the professional press were talking about the findings of a survey and tests conducted by Terra Eco and a consumer association. The report found fraud on seafood labels but there was no fraud found with Alaska seafood (salmon, pollock, cod). The magazine got a lot of attention from the media.*
- *ASMI received one free insertion in Elle A Table for spring.*
- *Two chefs developed video recipes with Alaska products. Chef Yves Papin Bon Paris created a black cod recipe. Restaurant Les Caudalies created a recipe with smoked Alaska salmon.*
- *The Rungis International website created a page dedicated to smoked wild Alaska salmon.*

- *Total free press this year: Four TV programs, two videos on a blog, three pages/insertions, four culinary blogs with five pages; reached 13,444,829 people – space value: \$584,024.*

Trade Advertising/Retail Merchandising: Two newsletters for the trade are produced each year, one to announce the harvest and program allocation, the second announces ESE information. Trade ads are also placed promoting all species in key publications and distributor diaries. In addition, ASMI conducts retail merchandising activities to increase brand awareness and inspire sales.

- *Six advertorials were placed in six professional publications: one seafood publication, Produits de la Mer; one frozen food buyers' magazine, Le Mondu du Surgelé, two magazines for retailers and stores managers in France, Lineaires and ZePros Distribution, and two magazines for food service, Zepros Restauration and La Cuisine Collective.*
- *ASMI ads had a circulation of 283,219 and a readership of 680,076.*
- *Delpierre promoted salted cod in Casino supermarkets and hypermarkets and in Carrefour markets and hypermarkets.*
- *Toupargel, a home delivery company, featured chum steaks and chum portions in its catalogues.*
- *Agriberia promoted salted cod during Portuguese weeks conducted with five retail chains. Volume of salted cod promoted: 250 MT = \$3,500,000.*
- *Findus had the ASMI logo featured on consumer ads (circulation 1,500,000 readers) to identify breaded fish sticks. Additional volume of breaded fish sticks sold during the ad campaign 55T: \$462,000*
- *This year ASMI has conducted fifteen promotions for a volume sold of 663.6 tons worth \$13,926,115.*
- *Seafood Expo Global took place May 6-8. ASMI took advantage of the additional 132 square meters of space adjacent to the existing Alaska Pavilion and created a pavilion that benefitted to our 20 co-exhibitors and all other members of the Alaska Seafood industry attending the show. More than \$500 million in sales were projected as a result of the show.*



Foodservice Promotion: ASMI has two target markets for the foodservice sector: white tablecloth restaurants for high-end species and foodservice operations and industrial restaurants for higher volume species.

- *ASMI worked with foodservice distributors to have them promote single frozen Alaska pollock, processed in France (breaded- ready meals), in addition to what they had already been promoting.*
- *ASMI conducted one promotion with Flunch cafeterias at 250 outlets; visited by 1,000 consumers. The meal with chum steak was identified as wild Alaska salmon: volume sold 25 MT, value of \$202,500.*
- *ASMI conducted one chum steak promotion with Brake, the food service distributor.*
- *Davigel, who currently markets single frozen Alaska pollock, promoted plain fillets and breaded fillets identified with the ASMI logo featured in the promotional catalogues (printed and on line).*
- *This year ASMI has conducted four promotions with three partners. Volume sold - 94 MT, value \$845,506.*

Central EU (Germany, Austria, Switzerland, Czech Republic and Poland)

Market Update:

Stührk's smoked salmon and salmon roe will carry the Alaska RFM seal. Stührk is still buying MSC certified salmon for retailers' private labels, such as Kaufhof.

Labeyrie will use the slogan "from sustainable fisheries" for RFM certified Alaska salmon, but will continue to market MSC certified salmon as well. Labeyrie purchases smoked salmon from Switzerland.

Aldi's importer said the retailer does not want to promote Alaska as "wild" any longer.

In Poland: Morpol and Suempol contacted ASMI for information on the RFM seal. Suempol came back in January to discuss promotions.

Right before the holidays, Dirk Abrahams GmbH informed ASMI that the company received the RFM Chain of Custody certification and will promote wild Alaska salmon.

In retail stores, there is smoked sockeye with the RFM seal (Stuhrk), smoked coho, smoked sockeye, and smoked chum with the RFM seal and MSC logo (Youkon), and smoked sockeye and smoked coho with and without the MSC logo, but with an Alaska name (Kodiak brand, Freidrichs).

Consumer Program:

- *January 1, a very popular TV show featured German people who live and work in Alaska: ASMI longtime allies Sissi Babich and her husband Gunter represented the seafood industry.*
- *Articles about Alaska, a result of 2013's trade mission, came out in the renowned chef publication Port Culinaire n° 27 and Port Culinaire n°28: 40 pages and recipes.*
- *In total, 5,255,000 people were reached through free press, for a space value of \$736,688*
- *Transgourmet, the national foodservice distributor proposed a trip to Alaska with 10 participants. Among them, the buyer from Nordsee (German fast-food restaurant chain), one buyer from Edeka (largest German supermarket corporation), one buyer from Coop Switzerland (the second largest retailer in Switzerland) and one buyer from Bell Seafood (a leading meat processor in Europe). The trip took place the second week in June.*

Trade Shows: February 9-11, ASMI attended Fish International (Bremen) with a corner booth in the Transgourmet pavilion with a display case and a cooking station. Transgourmet introduced white king and sockeye into their line and won 50 new Alaska seafood customers.

Retail Merchandising/Trade Advertising: In addition to retail promotions, ASMI produces two newsletters to reach the German trade and also advertises in several key trade publications.

- *This year fourteen insertions have been placed in four publications: Minus 18° (frozen food), Fish Magazin (Seafood), Lebensmittelzeitung (retail) and Catering Management (foodservice). Circulation: 146,000 – Readership: 400,000*
- *Hit Dohle, a regional retail chain, promoted wild Alaska salmon in their catalogue and website.*
- *While attending Anuga, (the largest trade show in Europe), ASMI collaborated with Kunkel/Die Raucherei through participation at their booth and having printed materials developed and displayed. The ASMI CEU office met with buyers of deli departments (smoked salmon and salmon roe), along with Dohle, the Kaufhof buyer, and buyers and store managers from various chains and gourmet stores.*
- *ASMI promoted smoked salmon in Poland for the first time with a two page insertion in the March edition of "Spizarnia Smakow" a seasonal catalogue of the Polish retail chain Piotr & Pawel. Volume sold during the promotion: 4,025 Kg.*

Foodservice Promotion: ASMI assists the German foodservice industry with AK seafood menu development, advertising promotions and by following up on opportunities gained at HRI shows.

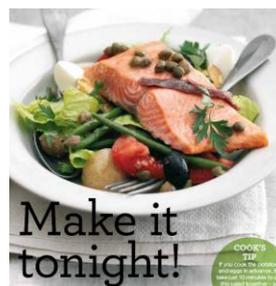
- *In January 2014 ASMI contributed to a promotion with Deutsche See who promoted coho, king salmon and black cod at the Gourmet Festival on the German Island of Sylt which was attended by famous chefs. Alaska salmon and black cod were served to the participants. Deutsche See won new clients and this event generated sales of 500 kg.*

- ASMI participated in the Gastrovision VIP event in conjunction with Internoga through Die Raucherei Kunkel. Retail chain buyers, foodservice buyers, chefs from hotels and restaurants come to Gastrovision. (2,475 people registered this year and ASMI got the contact list.) Kunkel negotiated smoked Alaska salmon promotions with Globus (Switzerland). Hit Dohle got 15 new clients in the deli sector.

Northern EU **(UK, Ireland, The Netherlands, Finland, Denmark, Sweden)**

Consumer PR/Advertising: ASMI uses a variety of public relations activities, like social media, event sponsorships, press releases and consumer events in order to generate publicity about the high quality Alaska Seafood available in the UK market.

- *Alaska Seafood UK Facebook Page -1,974 fans. The Alaska Seafood UK Facebook page is updated three times per week with fun facts, new recipes, sustainability facts and other information related with Alaska Seafood. www.facebook.com/AlaskaSeafoodUK*
- *Alaska Seafood UK Twitter Page- 689 followers. The Alaska Seafood UK Twitter page is used to share relevant information to promote Alaska Seafood in the UK such as recipes, information about sustainability, seafood facts, etc. The page is updated three times per week and has had more followers every week. <https://twitter.com/AlaskaSeafoodUK>*
- **Morning TV Program Koffietijd, Easter, April 2014.** ASMI will participate in a special co-op promotion with Frank's Smokehouse. ASMI is still negotiating the details of the cooperation.
- **Dahl TV, Keuringsdienst Van Waarde: February 2014.** ASMI was approached by a consumer program about food processes. KvW indicated interest in researching the product fish sticks (often made with Alaska pollock and produced by Iglo). KvW worked with GAPP, Iglo, and ASMI's Netherlands office to show from start to finish how this product is developed.
- **The Taste of Amsterdam, May 2014.** Special cooperation with Frank's Smokehouse and Frank Heyn for participation in the outdoor consumer and trade event.
- **Healthy Magazine:** A full page advertorial within 'recipes,' a giveaway (with opt in data included) plus a recipe online at www.healthy-magazine.co.uk. The edition went on-sale March 22nd to coincide with the Easter and spring periods.



- **Weightwatchers Magazine:** Two sponsorships of the “Five day food planner” section, which will include Alaska salmon in the recipe ideas. Alaska salmon was included in the Feb. 26 and March 6 issues.
- **Delicious:** ASMI secured the opportunity for an Alaskan seafood chef to be profiled and give tips to cooking with wild Alaska seafood in the experts section of the magazine. The ASMI team is currently searching for a suitable chef.
- **Feel Good Food:** An Alaska fisher-family will be featured as part of the VIP Producer segment in Feel Good Food, to be published summer 2014.
- **The Sun:** ASMI secured the opportunity to feature an Alaskan fisherman in the “Live Like a Local” section of the paper. The interview will be published in the summer, when Alaska salmon is in season.
- **Sales and media mission for State of Alaska:** The Alaska tourism program organised a media and sales mission on the 10th, 11th and 12th of February in London, Oxford and Leeds respectively. The London event consisted of a seated three-course media dinner. The Oxford and Leeds events were travel trade training events where travel agents learned more about the destination followed by a buffet dinner. Alaska seafood was served at all events.
- **Jamie Oliver:** ASMI is running a campaign with Jamie Oliver, Foodism and Escapism. The campaign includes a ‘cook with Alaska seafood’ event, as well as two advertorials, a competition to win a trip to Alaska and banners on all websites.
- **House & Garden:** ASMI will be featured at strategic points throughout the year, including in the House & Garden summer special (published in May), as well as sponsorship of the Publishers Letter in the June issue of House and Garden and distribution of recipe books in subscriber goody bags at the Spirit of Summer Fair, May 14-17, 2014.

Retail Merchandising:

- **Ocado:** A promotion was negotiated in the UK to support canned Alaska salmon with Ocado the on-line grocery shopping company linked to Waitrose.
- **John West Canned Pink Salmon Tesco:** ASMI is working with John West to promote their canned pink salmon. The promotion includes in-store recipe barkers to emphasize Alaska origin and Wild, Natural and Sustainable, linked with the John West activity on the 213g pink salmon can. The activity is running in 400 Tesco stores.



- **John West Canned Pink Salmon Morrisons:** ASMI and John West created in-store Recipe Barkers to emphasise Alaska origin, Wild, Natural and Sustainable linked with John West activity on 213g pink salmon can. The activity will be in 340 Morrison's stores.
- **World Wise Foods canned salmon and Marks & Spenser promotion:** Worldwide Foods is the own label provider of canned salmon for Marks and Spencer. The promotion consists of a series of two advertorials in the M&S magazine which has a print run of 750,000 and a readership of 3.4 million. Each issue has a shelf life of two months.
- **Coop and Icelandic pink salmon promotion with Alaska RFM logo:** Icelandic has completed the COC certification for Alaska salmon and cod. Icelandic will redesign their packaging to use the RFM logo. The promotion will including in store "bus stop" cabinet banners to promote the newly designed pink product.
- **Waitrose:** The keta and sockeye targeted activity will consist of price promotional activity funded wholly by New England Seafood with advertorial in the Waitrose magazine, provision of consumer recipe cards and advertising banner activity on the waitrose.com website. The promotion started in March and will continue until June.

Foodservice Promotion: Activities include in-outlets promotions, menu features and special Alaska themed promotions.

- **Host Magazine:** ASMI inclusion in the gastronomy feature included three or four recipes and accompanying images plus a full page advertorial in the January issue of Host Magazine.
- **Culinary Arts Westminster Kingsway College:** Jose Souto, Chef Lecturer, teaches a sustainability course based on the Alaska Seafood sustainability model. Jose delivered a series of lectures and developed a sustainability dinner on the 4th, 5th and 6th of March. For this activity we provided 25 sides of sockeye from New England Seafood. A representative from ASMI attended one of the seminars.
- **UK Quality Food and Drinks awards:** As a sponsor, ASMI had a full page advertisement in the call for entries brochure as well as a logo and branding on the cover of the call for entries brochure, editorial coverage in the call for entries

brochure and a logo, branding and banner on the web site www.qualityfoodawards.com.

- ***Young National Chef of the Year:*** ASMI is one of the five sponsors of the Young National Chef of the Year competition organised by the Craft Guild of Chefs. The format includes a series of heats where winners of regional competitions have a chance to compete in a cook off. Semi-final cook offs take place ahead of the live grand final held on the same day.
- ***Caterer and Hotelkeeper Magazine:*** ASMI is sponsoring a breakfast seminar in partnership with Caterer and Hotelkeeper magazine. The concept of the event is a panel debate over breakfast. It is positioned as a business event where guests can come and partake in a discussion about a relevant topic. The theme of the breakfast briefing will be the sustainability of seafood. ASMI salmon lox will be served.
- ***Stock Pot & Eat Out Magazines:*** Alaska seafood will be featured with one advertorial in the April, May and June issue of Eat Out magazine and one advertorial on the summer edition of Stockpot.

Southern EU (Spain, Portugal, Italy)

Trade Shows: ASMI participates in the leading seafood show for SEU, CONXEMAR because it enables ASMI to present key Alaska seafood messages directly to seafood trade members, educate the trade, provide them with materials that support Alaska seafood's messaging and display product. At CONXEMAR (Oct. 1-3, 2013):

- *The Alaska Seafood pavilion generated 99 serious trade contacts.*
- *The Alaska Seafood pavilion generated on-site sales of Alaska seafood worth \$435,000 (total ASMI budget for the Alaska Seafood pavilion was \$45,650.)*
- *The Alaska Seafood pavilion generated 12 month projected sales of Alaska seafood worth \$3,850,000.*

Retail Merchandising:

- *The Spanish cash and carry chain Makro (part of the Metro AG group) introduced refreshed H&G Alaska sockeye salmon and black cod in all 37 of their retail centers in Spain in February 2014, making these Alaska seafood products available to the chain's over 900,000 registered retail and HRI clients across the country. ASMI supported the product launch by creating a recipe/information brochure and in-ice signs for each product.*

- **ASMI SEU conducted 34,495 store days of promotions of origin-identified Alaska seafood in 765 outlets generating a 24% increase in sales for a total of \$2.3 million in sales of Alaska seafood products.**

Trade Public Relations: ASMI’s SEU office targets HRI and seafood trade press with two press releases focusing on the natural, healthy, and ecological advantages of Alaska seafood products.

- *Alaska Seafood Promotion & PR Event with Nobu:* From February 7 – 19, the Armani Nobu restaurant in Milan offered its guests an Alaska Seafood Menu. The restaurant reported serving over 230 Alaska Seafood menus during this period. These dates coincided with the Identità Golose chef congress/trade show in Milan on February 9-11 at which time many top chefs and HRI professionals concentrate in Milan.
- *Comerjapones.com Website and Facebook and Cooking Classes Sponsorship:* Apart from regular presence of Alaska seafood products on the Comerjapones.com website and in their cooking classes in Madrid, Barcelona and Valencia, ASMI SEU and Comerjapones organized a pre-Christmas wild Alaska salmon recipe contest. Over 500 people, many of them professional chefs, participated in the contest. The number of likes of the Alaska Seafood Spain Facebook page jumped from 2,660 to 3,200 during the promotion.
- 145 articles about Alaska seafood were generated from July 2013 to March 2014 with an advertising value of \$67,403.
- The SEU websites generated 32 requests for offers during the 1st three quarters of FY’14
- The SEU websites received 19,028 visits during the 1st three quarters of FY’14

<u>SEU Facebook Page</u> <u>Total Likes*</u>	<u>Mar</u> <u>2013</u>	<u>Jun</u> <u>2013</u>	<u>Sep</u> <u>2013</u>	<u>Dec</u> <u>2013</u>	<u>Jan</u> <u>2014</u>	<u>Feb</u> <u>2014</u>	<u>Mar</u> <u>2014</u>
Alaska Seafood España	2,064	2,578	2,629	3,200	3,520	3,502	3,509
Alaska Seafood Italy	4,750	7,549	7,505	7,487	7,597	7,818	7,807
Alaska Seafood Portugal	439	720	897	906	908	910	909

HRI Trade Shows: ASMI participates in HRI trade shows to reach influential HRI professionals that are the decision makers for restaurants and institutions. Our objective is to educate this audience on the benefits of adding Alaska seafood to their menu as well as explaining what the Alaska brand stands for.

- *ASMI supported various local distributors of Alaska seafood products in three trade shows during the second quarter FY2014:*
- *Madrid Fusión Jan. 27 – 29, 2014 in Madrid, Spain:* ASMI SEU shared a 24 m2 double booth and conducted product tastings with Koppert Cress in the 2014 edition

of the chef congress / HRI trade show Madrid Fusión.

- *GastroAlicante February 22-24, 2014 in Alicante, Spain: ASMI SEU provided ASMI display materials, a refrigerated display case, and Alaska seafood products for Cominport's stand in the regional food trade show GastroAlicante.*
- *Alimentaria March 31 – April 3, 2014: ASMI SEU participated in the booths of two local distributors, Cominport and Garmiko, in the HRI section of Spain's leading food trade show, Alimentaria.*
- *Total HRI trade contacts generated during the first three quarters of FY2014: 214*
- *Total new products or suppliers introduced to market during first three quarters of FY2014: one product (Alaska coho salmon was introduced in Spain) and one new supplier (distributor Garmiko began selling AK seafood in early 2014).*

Chef/Trade Training Seminar: ASMI organizes training seminars for professional chefs as well as seafood processors, importers, distributors and food journalists.

- *Mesa Marcada 31 January, 2014 in Lisbon, Portugal: ASMI SEU contributed Alaska seafood products to Luis Barradas' presentation and tasting of various Japanese dishes at this year's prestigious Mesa Marcada event announcing the winners of the group's The 10 Preferred Restaurants and Chefs of 2013 awards.*
- *Comidas do Mundo 20 – 25 February, 2014 in Lisbon, Portugal: ASMI SEU sponsored the chef demo/restaurant of Paulo Morais in this year's edition of Comidas do Mundo, an international foods festival featuring 10 top chefs each offering a different international cuisine. Chef Morais is Portugal's top Asian cuisine chef and works with Alaska sockeye salmon, ikura and black cod regularly in his restaurant Umai.*
- *Peixe em Lisboa March, 2014 in Lisbon, Portugal: ASMI SEU contributed Alaska seafood product to three of the chefs participating in Portugal's yearly seafood gastronomy fair, Peixe em Lisboa (Fish in Lisbon).*

Eastern EU (Russia and Ukraine)

Market Update:

In the Ukraine, the economy is again being affected by the serious unrest and political troubles that have mainly been focused on Kiev but are now spreading to cities in western Ukraine. This has put pressure on the Ukrainian Hryvna (UAH) losing value against most key currencies including the \$USD.

Alaska seafood exports to Russia **grew 61% in volume from 2012 to 2013 and 146% in value** over the same time period, climbing to 8,561 MT worth **\$60,470,000**. Total exports to the ASMI Eastern EU region (Russia and the Ukraine, which is considered a

more accurate look at the market due to heavy re-exports through Ukraine) were 25,621 MT in 2013, valued at **\$128,915,200**. This is 58% growth in volume and 91% growth in value over 2012 total EEU exports.

The EEU market is a significant salmon roe market. In particular, pink salmon roe is preferred by Russian consumers, opposed to the Japanese market which favors chum roe. **In 2013 salmon roe exports rose 198% in volume and 252% in value over 2012, reaching 3,213.5 MT worth \$46,594,400.** This climb was in part due to the record breaking pink salmon harvest, however, Alaska's other major roe market, Japan, only grew 27% in volume and 35% in value, demonstrating a smaller capacity to absorb additional roe products.

The surimi market in EEU has grown to an over \$8 million market in recent years. The EEU market also absorbed a great quantity of frozen pink salmon in 2013. **Exports to the region grew 239% in volume and 207% in value, to 6,139.3 MT worth \$15,507,000.** Additionally, in contrast to some trading partners, the EEU market has been clear that the lack of MSC certification for Alaska salmon is not a barrier to entry.

ASMI's presence in the region over the past decade has paid dividends. ASMI has 17 active trade partners in the region with whom we conduct promotions and an independent survey of trade members indicates a 59% trade preference for Alaska salmon roe over roe from other sources. Estimated sales at the ASMI booth at the 2013 World Food Moscow show reached \$1,700,000.

The Russian market is an attractive and growing market. The average Russian consumer allocates roughly 40% of the household budget towards food costs, which is double the European average. HRI sales in Russia grew 12 percent in 2012 in current value terms and are forecast to grow 13 percent in 2013.

Brazil

In 2013, Brazil imported 383.3 million tons of seafood, an increase of 12.5% from the previous year. The value of these imports reached \$1.33 billion, for growth of 15% year on year. Alaska seafood imports saw increases as well- a 14% increase in volume (607 metric tons) and a 91% increase in value (\$2,259,500).

Retail Merchandising:

- **Alaska chum salmon and cod loin and fillet promotion - Pão de Açúcar (GPA) and Extra** *January 14 – February 1, 2014, A three-week Alaska chum salmon and cod loin and fillet promotion at Pão de Açúcar (GPA) and Extra supermarkets in São Paulo took place. Alaska cod and salmon were featured and sampled by promoters hired for the occasion to educate consumers about the product and its origin. GPA ran a special price promotion for the loins and fillets. 628 kg of Alaska seafood was sold during the promotion.*

- **Alaska cod, pollock and pink and keta salmon promotion- Pão de Açúcar, Extra, Walmart and Casa Santa Luzia in São Paulo February 4 – March 1, 2014** A four-week promotion of cod, pollock and pink and keta salmon took place at Pão de Açúcar, Extra, Walmart and Casa Santa Luzia in São Paulo. Walmart Brazil started to offer Alaska products in February and Pão de Açúcar kept the special price promotion for cod loins and fillets all month month, in addition to the inclusion of Noronha Pescados' keta salmon on Pão de Açúcar's online sales. Robert Hoff, USDA Brasília and Michael Fay, USDA/FAS São Paulo, visited stores during the promotion. 948.6 kg of Alaska seafood was sold.
- **Alaska cod, pollock and pink and keta salmon promotion - Pão de Açúcar, Extra, Walmart, Zaffari, Zona Sul, G. Barbosa and Bom Preço in São Paulo, Rio de Janeiro, Porto Alegre, Recife and Salvador. March 4 – March 29, 2014** A four-week promotion of cod, pollock and pink and keta salmon took place at Pão de Açúcar, Extra, Walmart, Zaffari, Zona Sul, G. Barbosa and Bom Preço in São Paulo, Rio de Janeiro, Porto Alegre, Recife and Salvador. New campaigns developed by ASMI and Noronha Pescados were part of special efforts for Easter 2014 and ran until April 17th. During the March promotion, 5,404.20 kg of Alaska seafood was sold.



- **Papo de Peixeiro – Fishmonger Talk” interview Walmart TV January 16th** “Papo de Peixeiro” is Walmart Brazil's monthly TV training program for retailer fish-counter employees. ASMI Brazil and Noronha Pescados were invited to talk about Alaska seafood and about Noronha's Alaska Series to kick start sales at the Walmart chain nationwide to 37 participants. The event was broadcast live on Walmart TV and was rerun twice at different times.

Trade PR/Website/Social Media:

- Number of likes added to the combined fan pages in FY2014: 84,519
- Number of likes total to the combined fan pages: 196,884
- Alaska Seafood Brazil created a You Tube Channel (www.youtube.com/peixesdoalasca)

- *ASMI Brazil runs two websites, one for trade and one for consumers: www.alaskaseafood.com.br and www.bacalhaudoalasca.com.br*

Trade Shows:

APAS and SIAL ASMI Brazil has secured 52 sqm at APAS, May 5 – 8 and 36 sqm at SIAL Brazil, June 24 – 27, trade shows. APAS is the leading supermarket show in Latin America. Alaska companies and local partners will be invited to participate.

HRI Promotions:

- **A Peixaria Restaurant Tasting Event January 20, 2014**
ASMI Brazil organized, in partnership with Go Where Gastronomia and Damm Pescados, a tasting event at A Peixaria Restaurant. The event included media and HRI professionals. The event was covered on three pages in the magazine's January 2014 edition, including a full page advertisement. Chef Cauê Tessuto prepared black cod and sockeye salmon.
- **Momotaro Restaurant Tasting Event January 30, 2014**
ASMI Brazil organized, in partnership with Go Where Gastronomia and Kalena Foods, an importer of black cod and sockeye salmon, and a tasting event at Momotaro Restaurant, a top Japanese restaurant in São Paulo. Five local chefs attended, including media and HRI professionals. The menu of black cod, prepared in missô sauce with roe, and sockeye tartare with seaweed and was specially developed by the recognized Chef Adriano Kanashiro.
- **Burger Lab Sockeye Burger March 27th, 2014**
Burger Lab restaurant developed a burger made out of sockeye salmon, with a roe and blini sauce. The burger is called "Burger Lab Diamond" and has an above average price. The ASMI logo is being displayed at the table cover.
- **Gula Magazine Ad Campaign January, February and March 2014**
ASMI Brazil placed three full-page ads in Gula Magazine in the January, February and March editions. Gula Magazine distributes 50,000 monthly, including chefs, sommeliers, HRI professionals and gastronomy lovers (end consumers). It is estimated that the magazine has 141,000 monthly readers.