

Leiðandi
vettvangur í tíu ár



ASMI: Promoting the Alaska Brand in a Global Market

Jeff Regnart, Fisheries Technical Consultant

Alaska Seafood Marketing Institute



SJÁVARÚTVEGS
RÁÐSTEFNAN

ISI ICELAND
SEAFOOD



TM

ITUB

BRIM

HAMPIÐJAN

Þrifa Örn

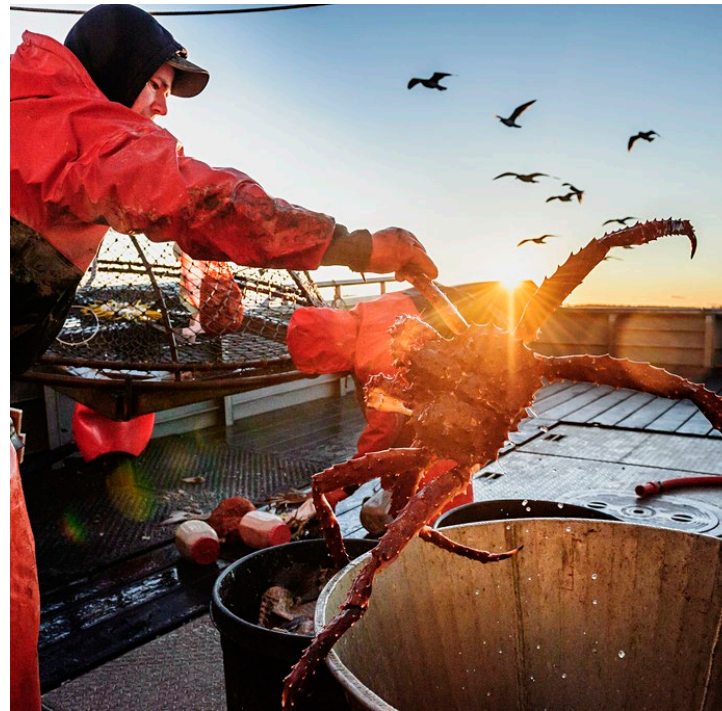
ALASKA SEAFOOD MARKETING INSTITUTE (ASMI)



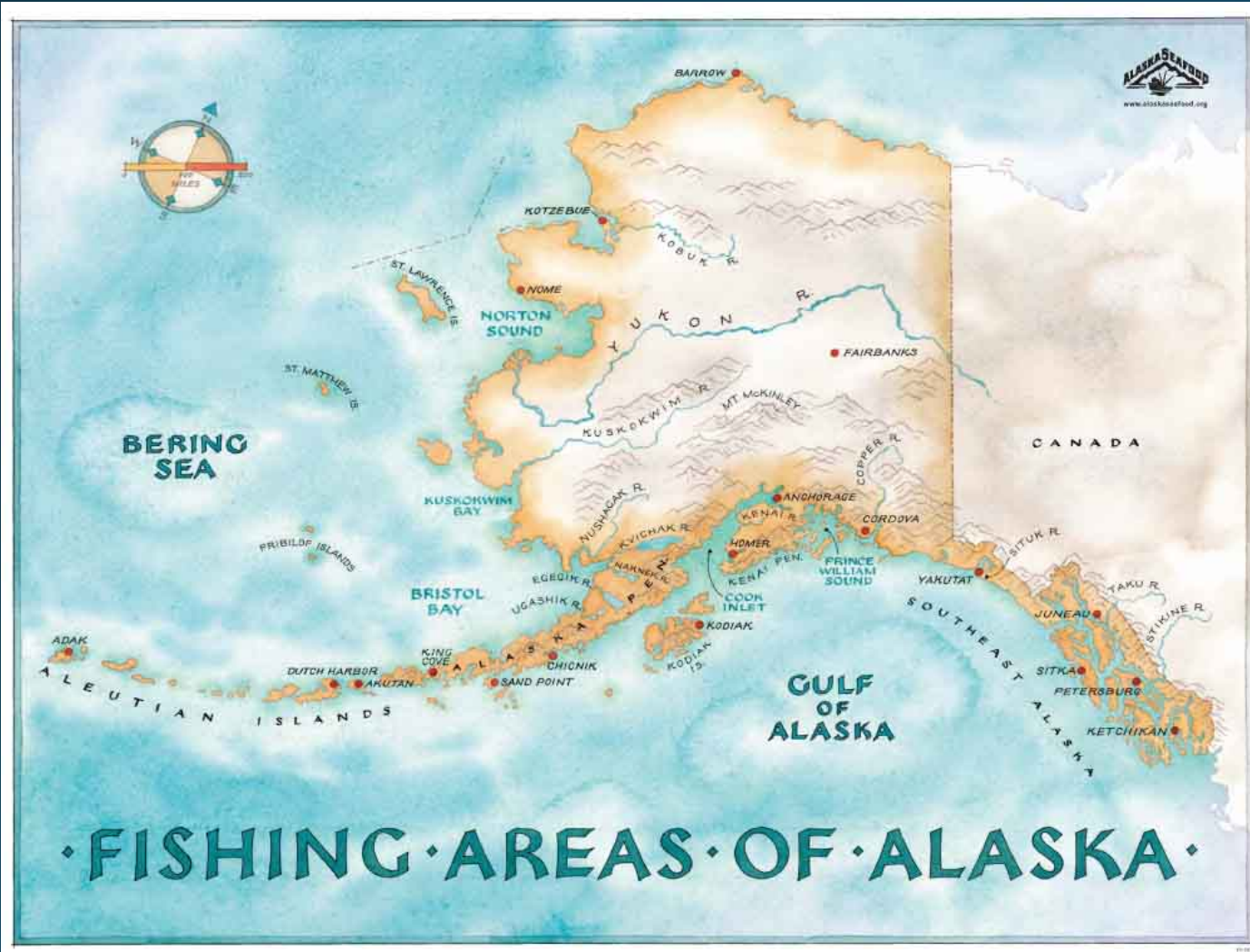
Wild, Natural & Sustainable®



OUR MAIN JOB: TELL THE ORIGIN STORY



ALASKA SEAFOOD AT A GLANCE



56% of the seafood harvested in the U.S. is from Alaska

- Salmon:

King, Sockeye, Coho, Keta, Pink

- Whitefish Varieties:

Halibut, Cod, AK Pollock, Sole/Flounder and other "Flats," Sablefish, Rockfish, Surimi Seafood

- Shellfish:

Crab (King, Dungeness, Snow), Scallops, Spot Prawns, Oysters



WHAT CONSUMERS CARE ABOUT

Now, more than ever, they want to know where their food comes from, to be able to eat healthy and sustainable food, without compromising taste and convenience.

ORIGIN. WILD. IT MATTERS.

New research understanding consumer perceptions of seafood and Alaska seafood at restaurants in the U.S.

59%

would order more
seafood at restaurants
if they knew its origin

5:2

Wild:Farmed

+47%

Menu penetration growth
of 'WILD' since 2009

**Wild +
Alaska**

is the magic
combination
6 out of 10 more likely
to buy



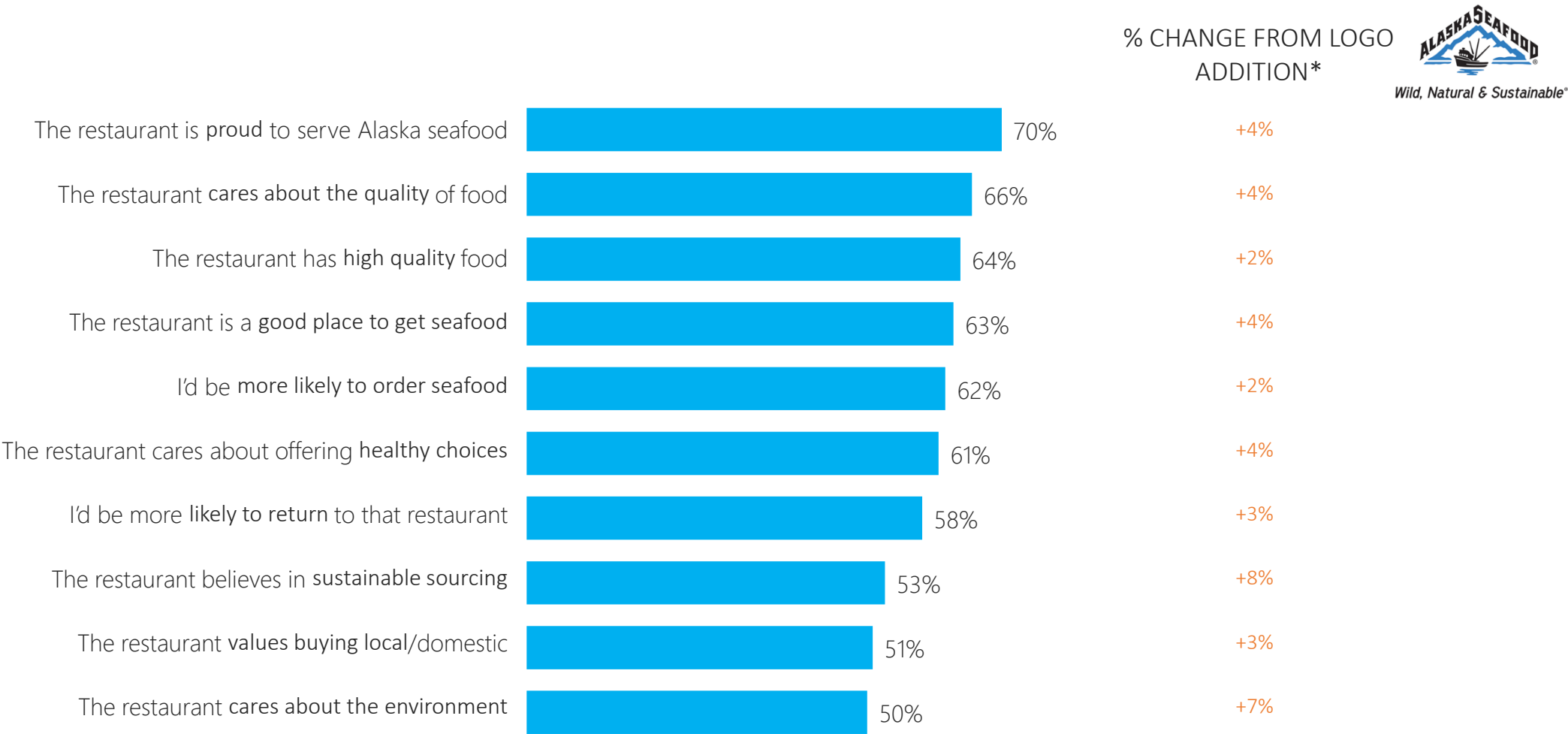
THE ALASKA ORIGIN IS POWERFUL AND DRIVES SALES IN THE U.S.



Mentioning “Alaska seafood” on restaurant menus drives home that the restaurant cares about serving the best seafood.

« The addition of the Alaska Seafood logo has the strongest impact on a restaurant being associated with sustainable sourcing and care for the environment.

IMPACT OF ALASKA SEAFOOD ON RESTAURANT PERCEPTIONS



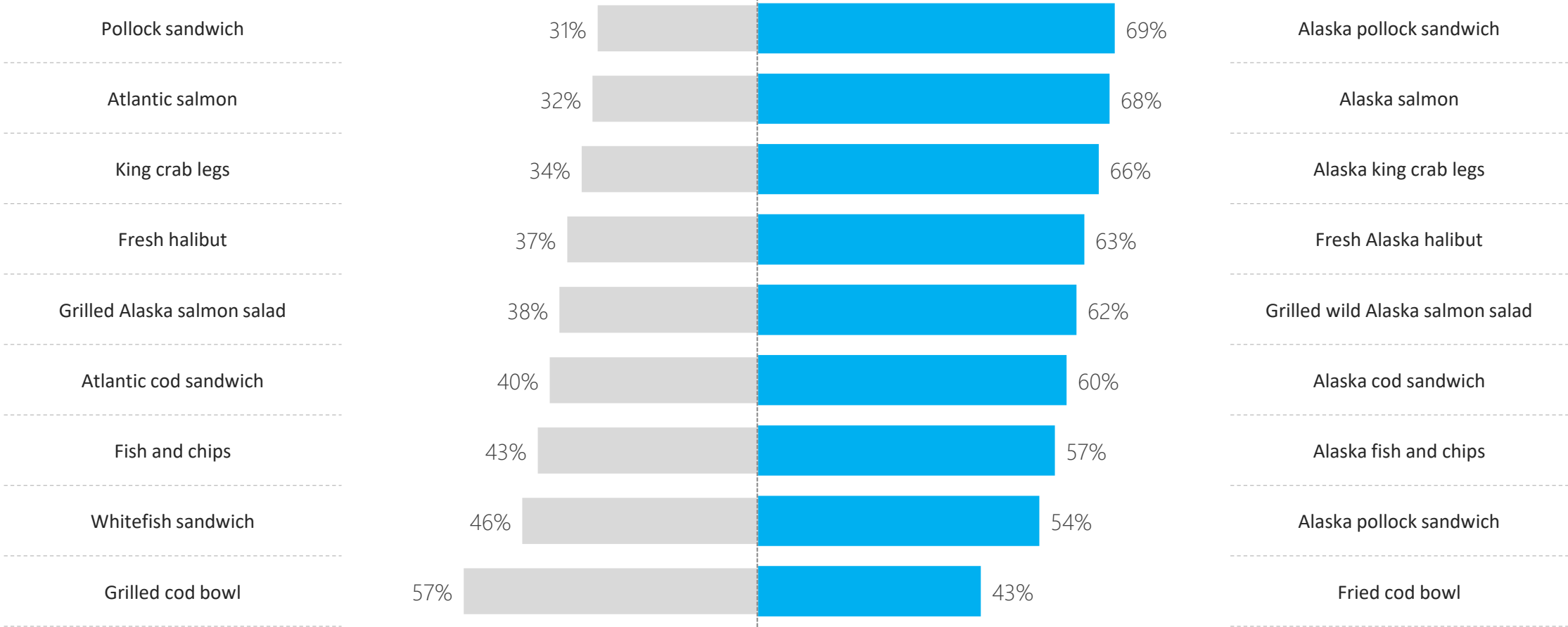
*Consumers were asked the extent to which they agree with each statement with and without the Alaska Seafood logo. Data in this column represents a percentage point increase (for example, 70% jumps to 74% after the logo is shown).

Consumers prefer seafood that specifies its origin on menus, and “Alaska” or “wild” descriptors are favored.

« Adding “wild” within the menu description of Alaska seafood increases its appeal.
« In most cases, consumers are one and a half to two times more likely to order seafood when “Alaska” is present in the name of the dish.

PREFERRED SEAFOOD MENU ITEM NAME AT CHAIN RESTAURANTS

do you prefer...



EATING HEALTHILY AND SUSTAINABLY IS INCREASINGLY IMPORTANT

Previously, consumers chose to be healthy and conscious of their food source because of cultural trends, but with rising obesity rates and overfishing concerns, the choice is no longer a “cool thing to do” but is now a must do.

There is a sense of urgency and civic necessity to make the health-conscious and sustainable decision.

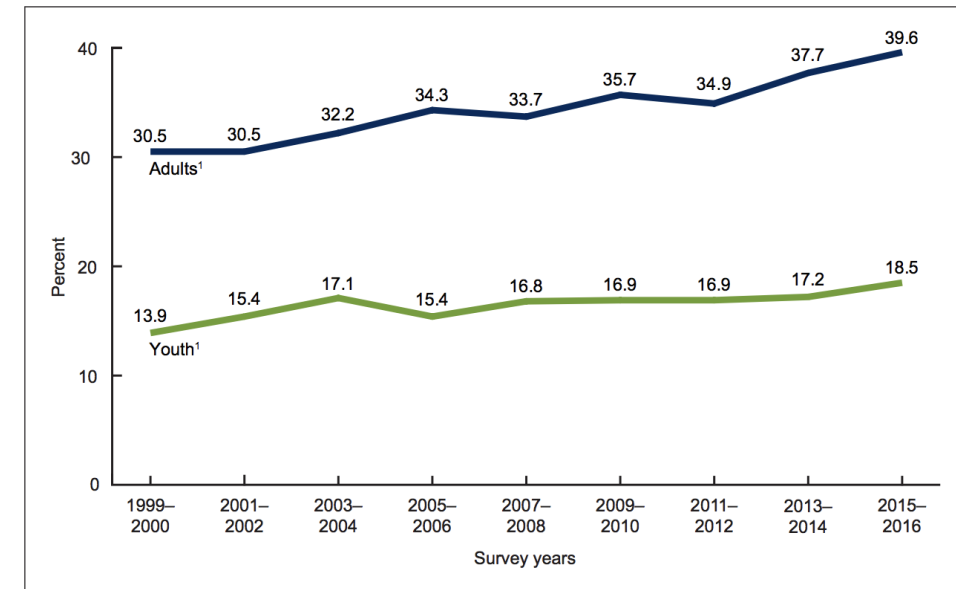
90% of fish stocks are used up – fisheries subsidies must stop emptying the ocean



Soles caught by a North Sea trawler

Image: REUTERS/Pascal Rossignol

Figure 5. Trends in obesity prevalence among adults aged 20 and over (age adjusted) and youth aged 2–19 years: United States, 1999–2000 through 2015–2016



¹Significant increasing linear trend from 1999–2000 through 2015–2016.

NOTES: All estimates for adults are age adjusted by the direct method to the 2000 U.S. census population using the age groups 20–39, 40–59, and 60 and over. Access data table for Figure 5 at: https://www.cdc.gov/nchs/data/databriefs/db288_table.pdf#5.

SOURCE: NCHS, National Health and Nutrition Examination Survey, 1999–2016.

ORIGIN. WILD. ALASKA. MATTERS IN CHINA.



93%

的消费者表示海产品的原产地对他们的购买决策非常重要
of consumers state that country of origin of seafood is important to their purchasing decision

85%

的消费者了解海产品的原产地
of consumers are aware of the origin of their seafood.

4/5

的消费者表示阿拉斯加原产地对他们的购买决策是“很重要”或“非常重要”的



consumers state that the

ALASKA ORIGIN

is “VERY IMPORTANT” or “EXTREMELY IMPORTANT”

when making a purchase decision

消费者知道他们所购买海产品的来源!

Consumers know where their seafood comes from!

84%

的消费者认同阿拉斯加海产品是高品质的海产品
of consumers agree Alaska seafood is high QUALITY

99.8%

的消费者在食用阿拉斯加海产品后表示喜欢该产品
of consumers who have tried Alaska seafood said they liked it

80%

的消费者表示阿拉斯加海产品是高品质海产品的绝好来源, 且可安全食用
of consumers say Alaska seafood is a pristine source of high quality and safe seafood

3/5

的消费者认为阿拉斯加海产比其他竞争产品的品质更高
consumers say Alaska seafood is better than the competition



ALASKA MATTERS IN CHINA.

消费者深信阿拉斯加海产品对人类和环境是有益的

Consumers trust Alaska seafood is good for them and the environment

事实
FACT



阿拉斯加海产品是可持续发展的
Alaska seafood is sustainable

75%

阿拉斯加渔业是有责任监管的
Alaska fisheries are responsibly managed

78%

阿拉斯加海产品可追溯源头
Alaska seafood is traceable to the source

73%



阿拉斯加海产有助健康!
Alaska seafood is good for you!

81%
天然
natural

82%
能放心食用
safe to eat

78%
纯净
pure

84%
有营养
nutritious



阿拉斯加海产美味可口!

Alaska seafood tastes great!

事实
FACT



81%

消费者是由于好的口味才去购买阿拉斯加海产品
of consumers are motivated to buy Alaska seafood because of the **TASTE**

81%

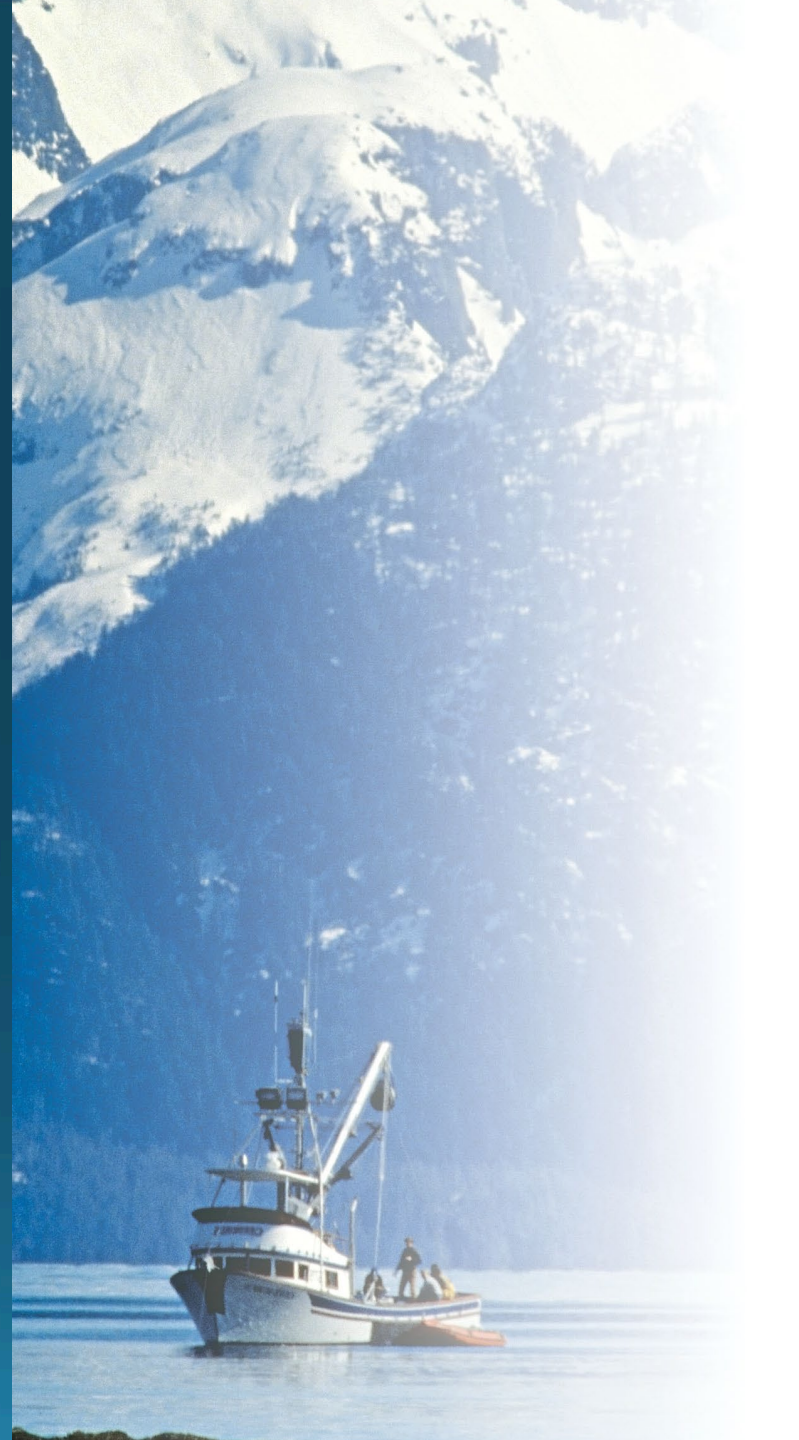
消费者是由于其高品质才去购买阿拉斯加海产品
of consumers are motivated to buy Alaska seafood because of the **QUALITY**

80%

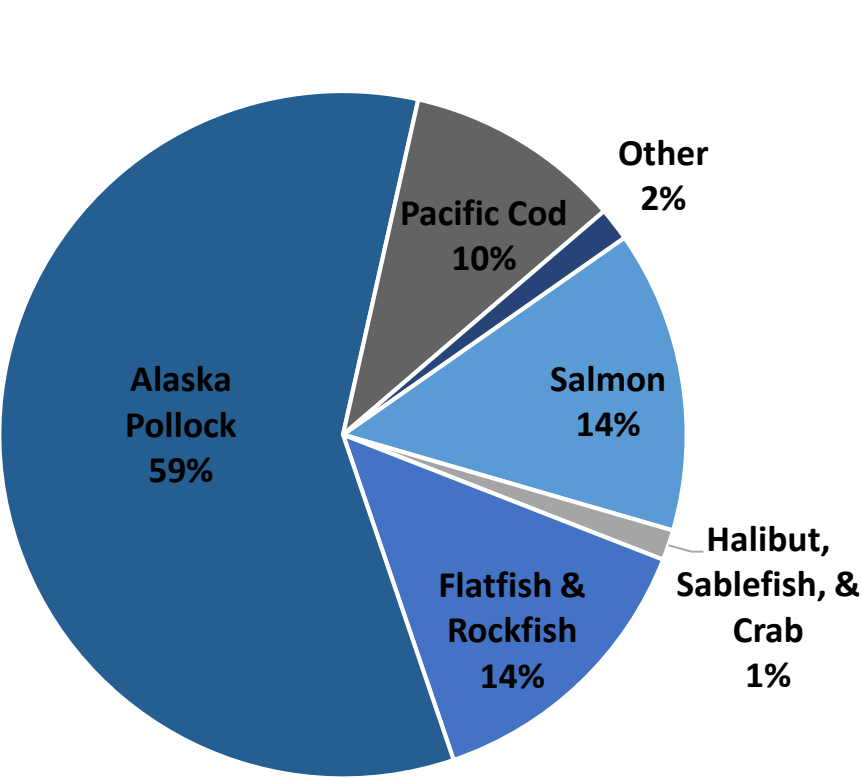
消费者是由于其天然的美味和产品丰富才去购买阿拉斯加海产品
of consumers are motivated to buy Alaska seafood because it is rich in natural **FLAVOR** and **ABUNDANCE**

HOW DO WE MEASURE?

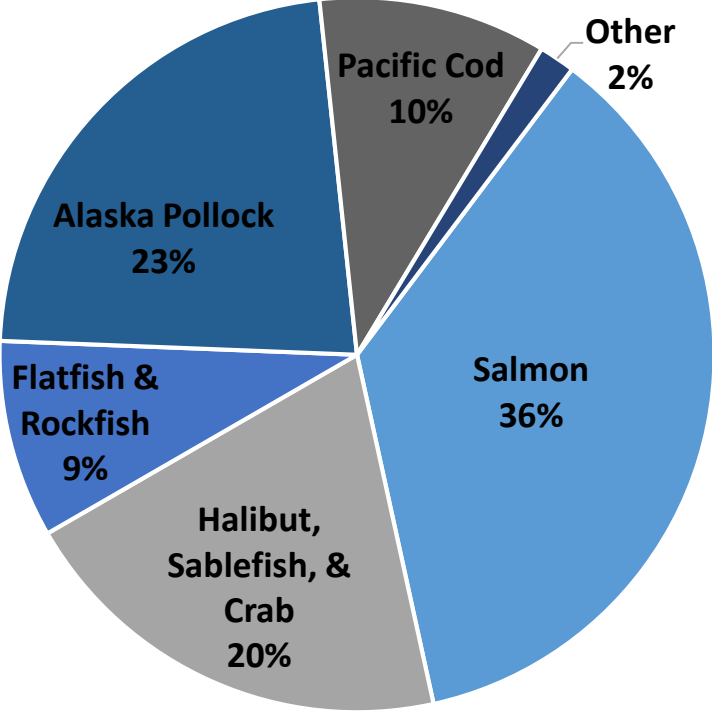
- % increase in market value of Alaska seafood (“first wholesale value”)
- % increase in grounds price paid per pound to fishermen (“ex-vessel value”)



ALASKA EX-VESSEL VOLUME AND VALUE BY SPECIES GROUP (2017/18 ANNUAL AVERAGE)



Ex-vessel Volume
5.8 Billion Pounds



Ex-vessel Value
\$2.0 Billion

Source: NMFS and ADF&G; compiled by McDowell Group.



GOALS AND MEASUREMENT

Alaska Seafood Marketing Institute is tasked with increasing the ex-vessel value of Alaska's fisheries by promoting the Alaska Seafood brand all over the world. ASMI measures success by the following standards:

Goal 1: Maintain second place ranking of Alaska Seafood among the most popular protein brands on U.S. restaurant menus.

Methodology: Dataessentials Research

ANALYSIS OF RESULTS AND CHALLENGES:

In 2018 Alaska Seafood maintained the No. 1 ranking for the third consecutive year. In 2016 Alaska Seafood, for the first time, obtained the No. 1 most commonly named protein brand called out on restaurant menus, surpassing Angus Beef.

In another study of U.S. consumers conducted by Dataessentials in January of 2016, 87 percent of consumers reported being more likely to order a fish/seafood dish if the Alaska Seafood logo is on the menu and 94 percent of consumers reported being more likely to order a fish/seafood dish when the word "Alaska" is on the menu.

Goal 2: Increase the first wholesale value of selected Alaska salmon products by 0.5 percent annually.

ANALYSIS OF RESULTS AND CHALLENGES:

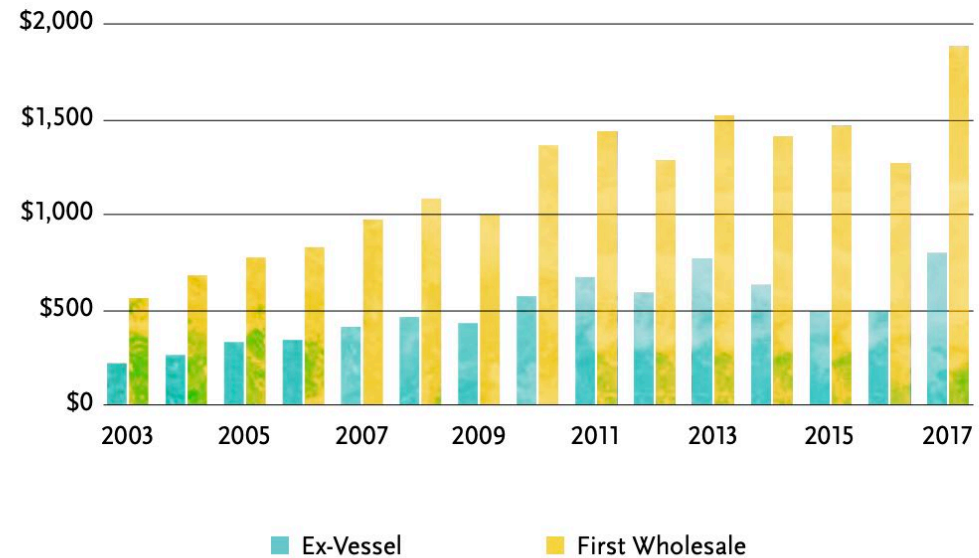
In 2017, both wholesale and ex-vessel salmon values increased significantly from 2016, climbing 50 and 61 percent, respectively. The primary reason for the increase in value was a harvest volume that was 76 percent higher in 2017 than 2016.

- The average ex-vessel value in 2016/2017 was \$633 million, compared to a \$437 million average in 2007/2008. This produces a CAGR (compound annual growth rate) of 2.7 percent.
- The average first wholesale value in 2016/2017 was \$1,578 million, compared to \$1,060 million in 2006/2007. This produces a CAGR of 4.1 percent.
- The CAGR of ex-vessel value and first wholesale value over the past 10 years is well above the 0.5 percent annual goal.
- Historical data generally indicates ex-vessel and first wholesale prices moving together. Since 2000, in all years but one, these two values rose together or fell together.
- Higher salmon prices are likely the result of strong demand, low inventory levels, favorable competition against farmed and wild salmon, improving currency rates, and marketing/promotion efforts, among other factors.

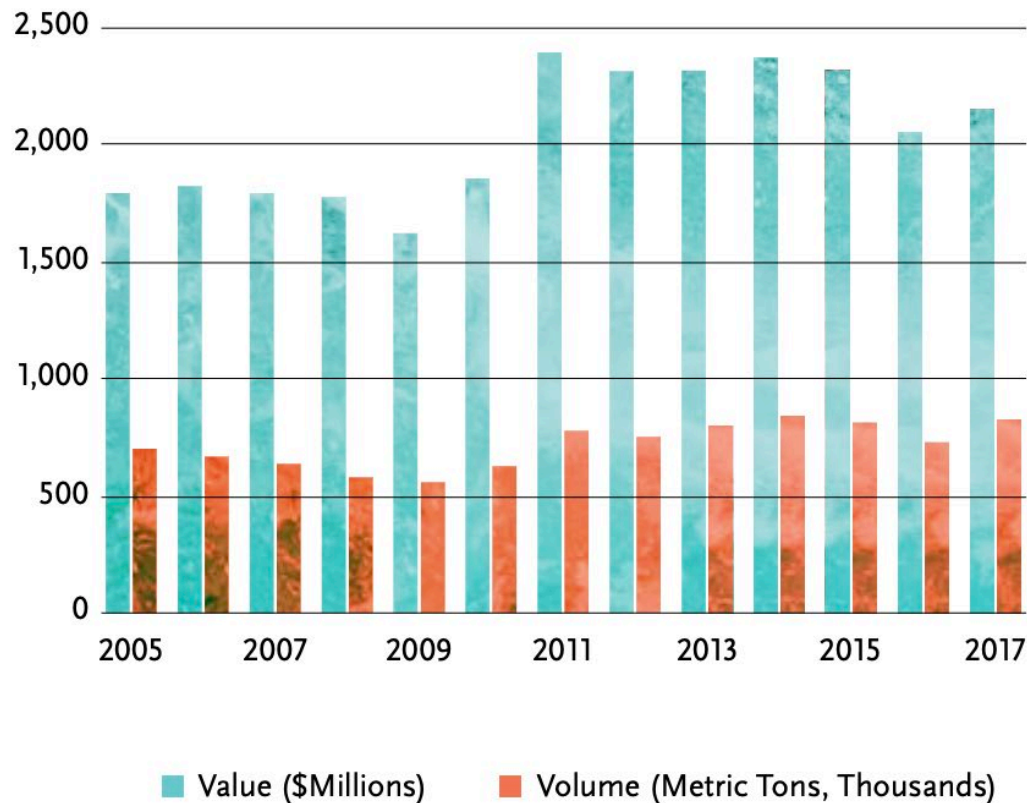
The bullet points above use two-year averages as a basis for comparison because pink salmon harvests tend to spike significantly in odd-numbered years.

ALASKA SALMON VALUE GROWTH: EX-VESSEL AND FIRST WHOLESALE

(Millions of dollars)



ALASKA SEAFOOD EXPORTS TO ASMI PROGRAM DESTINATIONS



Goal 3: Increase the aggregate value of Alaska seafood exports to Alaska Seafood Marketing Institute program destination countries by 0.5 percent annually.

ANALYSIS OF RESULTS AND CHALLENGES:

Export markets are critical to Alaska's seafood industry accounting for 60 to 70 percent of first wholesale value each year. Growth in export volume and value helps maintain markets for Alaska seafood and supports higher values for the state's annual production.

RESULTS:

- In 2017, the value and volume of exports to ASMI program countries rebounded sharply after two consecutive years of declines, increasing 19 and 13 percent from 2016 levels, respectively.
- A weaker U.S. dollar, product innovation by processors, a much larger and more valuable salmon harvest, and price improvement for some groundfish species are the primary factors contributing to 2017's success.
- Growth in export values to China and Japan were the drivers of the overall increase. In 2017, \$989 million worth of Alaska seafood was exported to China, a 25 percent increase from 2016; exports to Japan increased 27 percent to \$770 million. Growth occurred in all other ASMI program markets, except Central Europe and Brazil.
- Due primarily to fluctuations in harvest volumes, growth rates vary significantly from year to year. A long-term perspective is preferable when considering growth trends. Over the last decade, the CAGR in export value is 3.3 percent—well above the 0.5 percent annual goal.
- While export value to ASMI program countries increased 19 percent in 2017, exports to non-ASMI program countries declined 10 percent.

Goal 4: Increase the ex-vessel value of key species in Alaska's commercial harvest by 0.5 percent annually.

Methodology: 2017 is preliminary. Data Sources: ADF&G (Commercial Operators Annual Report and CFEC), National Marine Fisheries Service, and McDowell Group estimates.

ANALYSIS OF RESULTS AND CHALLENGES:

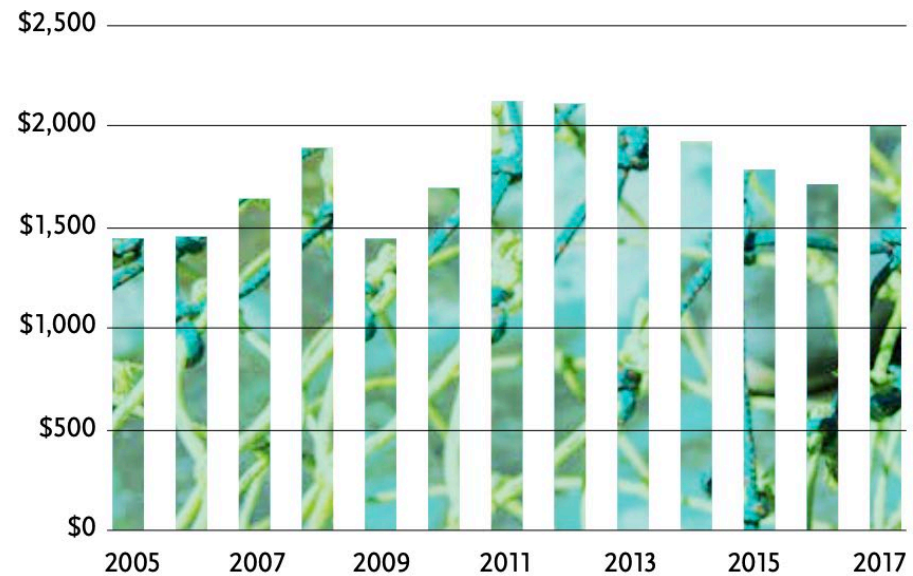
The harvest (ex-vessel) value of Alaska's commercial seafood includes payments from processors to commercial fishermen and estimated value of product caught by catcher-processors. Increasing the harvest value of Alaska seafood benefits Alaska residents in the form of economic activity and opportunity, along with state and local taxes.

RESULTS:

- Preliminary 2017 ex-vessel value data show key commercial seafood species totaled an estimated \$2.0 billion 2017. (This value is subject to revisions). Final ex-vessel data on federal groundfish species for 2017 are not available until December 2018.
- Compared to 2016, total value of these key species expanded 12.6 percent in 2017, due primarily to a very strong salmon harvest. Halibut and sablefish values expanded slightly; preliminary figures also indicate pollock and rockfish values increased. Pacific cod, crab and flatfish values likely declined or were flat against 2016 levels.
- A CAGR of less than 0.4 percent was observed between the averaged years of 2007/08 (\$1.79 billion) and 2016/17 (\$1.86 billion), nearly meeting the goal of 0.5 percent. It is appropriate to average even and odd years to smooth fluctuations in salmon harvest values.

TOTAL HARVEST VALUE OF KEY COMMERCIAL SEAFOOD SPECIES

(Millions of dollars)





RECENT CONSUMER CAMPAIGN EXAMPLES

One of the key ways ASMI reaches consumers is through the retail and foodservice promotions and education

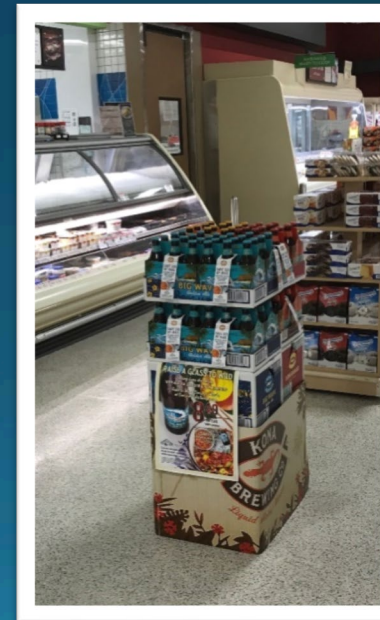
SHOP RITE – U.S.

- 235 Stores in the Northeast of U.S.
- Promotion dates: July 19-27, 2019
- Alaska Seafood Festival
- Product form: Alaska pollock, cod, salmon, surimi, crab
- Lift: \$1.02 million in sales for the week. 24% increase in salmon, 16% increase in cod

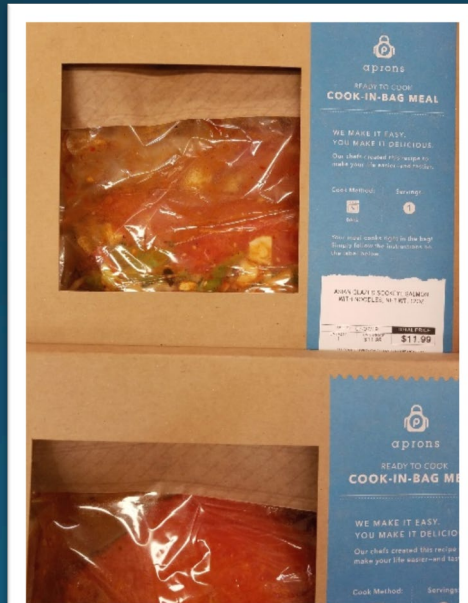


PUBLIX SUPERMARKETS – U.S.

- 1,231 Stores in the Southeast of U.S.
- Promotion dates: October 2018
- Demo's executed: 3,000 demos in 1,000 stores
- Product form: Frozen sockeye salmon
- Lift: 25.4% increase in Alaska seafood sales from \$1.63MM to \$2.04MM



PUBLIX SUPERMARKETS – U.S.



WILD FOR SEAFOOD

IN SEASON NOW, SUSTAINABLY SOURCED, AND ALWAYS FRESH, NEVER FROZEN. THE PERFECT CATCH FOR DINNER TONIGHT.

We proudly offer wild seafood caught by Alaskan fishermen.

Visit the Publix Seafood department to discover the wide variety of wild-caught seafood that we provide.

GreenWise Keta Salmon Fillets 8 ⁹⁹ _{lb}
Fresh, Wild, Sustainably Sourced SURPRISINGLY LOW PRICE (Aprons Keta Salmon Cook-in-Bag Dinner, Asian Glazed With Noodles, Fresh, Ready-to-Cook, each ... 10.99)
Halibut Select Cuts 11 ⁹⁹
Fresh, Wild, Net Weight 5.25-oz, each SAVE UP TO 3.00
GreenWise King Crab Clusters 18 ⁹⁹ _{lb}
Cooked, Previously Frozen, Wild, Sustainably Sourced SAVE UP TO 4.00 LB

WILD FOR ALASKAN SALMON

IN SEASON NOW, SUSTAINABLY SOURCED, AND ALWAYS FRESH, NEVER FROZEN. THE PERFECT CATCH FOR DINNER TONIGHT.

Medium White Shrimp* 5 ⁹⁹ _{lb}	Ground Chuck* 3 ⁷⁹ _{lb}
Easy-to-Peel, Previously Frozen, Farmed, 41 to 50 per Pound SAVE UP TO 4.00 LB (Medium White Shrimp, Peeled & Deveined, 51 to 60 per Pound ... 7.99 lb)	Publix Brand, USDA-Inspected, 3-lb or More pkg. SAVE UP TO .40 LB (Ground Chuck Burgers ... 4.49 lb)
Fresh Tilapia Fillets* 6 ⁹⁹ _{lb}	Cracker Barrel or Kraft Cheese Slices 2 ⁰⁰ _{lb} 6 ⁰⁰
Farm-Raised SURPRISINGLY LOW PRICE (Tilapia Fillets, Onion-Stuffed, Ready-to-Cook ... 9.99 lb)	7-oz 8-oz pkg. SURPRISINGLY LOW PRICE
Publix Premium Mussels BUY 2 GET 1 Free at Equal or Lesser Price	Publix Turkey Breast* .99 _{lb}
Tomato Garlic or Garlic Butter, Frozen, Farm-Raised, 16-oz pkg. SAVE UP TO 5.99	Bone-In, Frozen, USDA Grade A SAVE UP TO 1.60 LB
Publix Orange Roughy Fillets 7 ⁹⁹	Smithfield Boneless Ham Steak BUY 2 GET 1 Free at Equal or Lesser Price
Frozen, Wild, 12-oz pkg.	Maple Flavored, Honey Cured, or Hickory Smoked, Fully Cooked, 8-oz pkg. SAVE UP TO 3.59
Dungeness Crab Clusters 11 ⁹⁹ _{lb}	Ball Park Beef Franks BUY 2 GET 1 Free at Equal or Lesser Price
Cooked, Previously Frozen, Wild	Or Fat Free Turkey Franks, 14 to 15-oz pkg. SAVE UP TO 5.19
Matlaw's Stuffed Seafood Appetizers BUY 2 GET 1 Free at Equal or Lesser Price	Oberto Jerky BUY 2 GET 1 Free at Equal or Lesser Price
Frozen, 9-oz 11-oz pkg. SAVE UP TO 3.99	On Chicken Strips, 2.5 to 3.25-oz pkg. SAVE UP TO 6.59

Quantity limits per household apply. Not all items are available at all stores. *Items shown prepared with additional ingredients, which are not included.

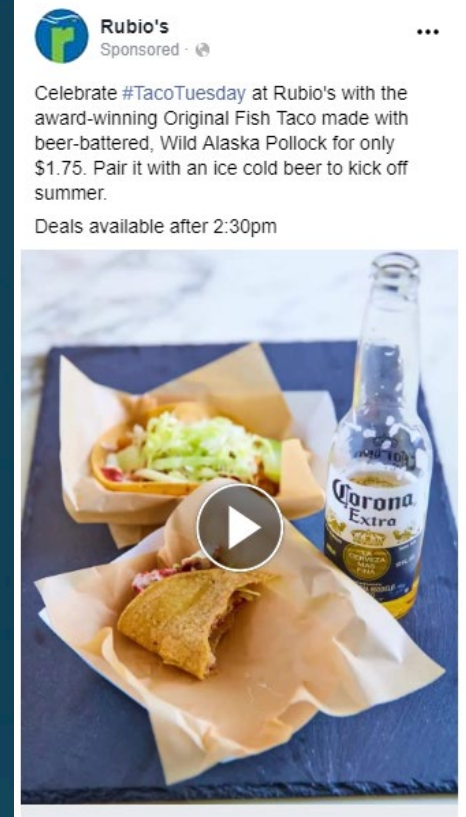
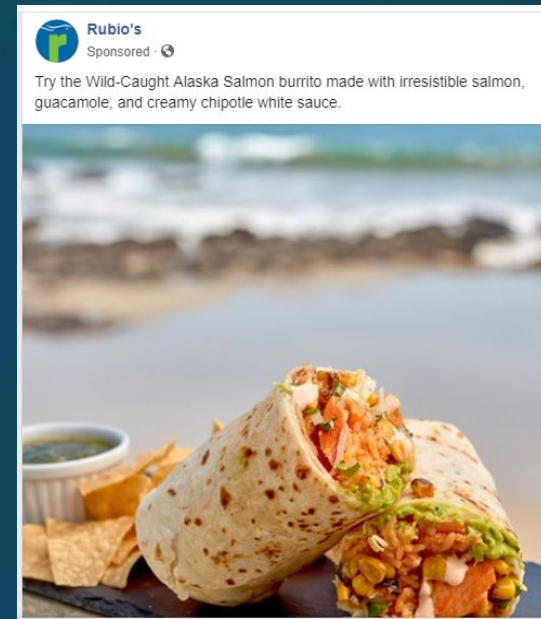
RUBIO'S- U.S.

- 205 units in the West cost of U.S.
- Promotion dates: July 2018 – June 2019
- Product form: Alaska pollock and coho salmon
- Results: 238,590 lbs and 1,064,530 lbs



For every ASMI \$1,
Chains spend \$18.28

95%
of our U.S. partners see
positive results



WILD-CAUGHT CHIMICHURRI SALMON AND ROASTED CORN SALSA



Did you know that all fish caught in Alaska is certified sustainable? Alaska is the only state with a mandate for sustainable seafood written right into its State Constitution. May is the beginning of the wild Alaska Salmon season and to celebrate, the chefs in our kitchen paired wild-caught salmon with the bold flavors we love, to create this amazing recipe.

SEARCH...

RECENT POSTS

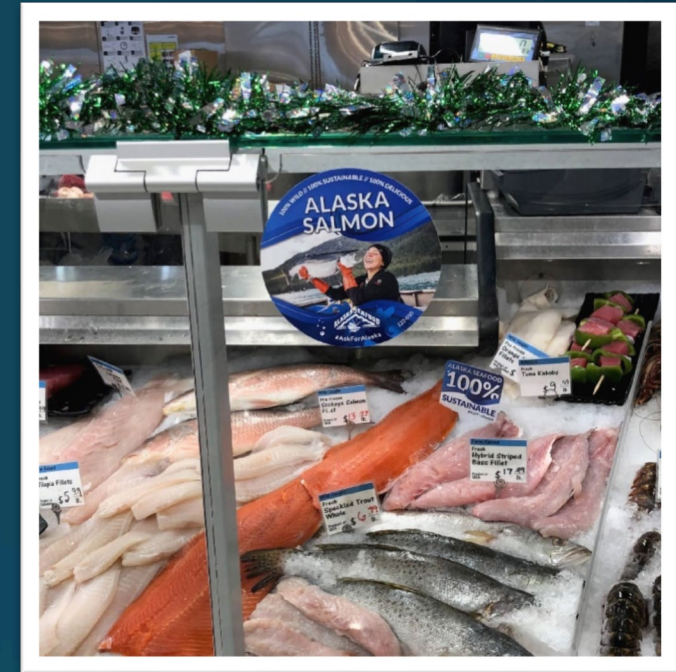
- Strawberry Lime Paletas
- Join Us for a Oaxacan Taste Adventure
- Watermelon, Jicama & Grilled Shrimp Salad with Basil Lime Vinaigrette
- Spicy Pineapple Margarita
- 6 Ways You Can Help Reduce Ocean Pollution

CATEGORIES

- A Peek Behind The Plate
- Healthy Living
- Recipes
- Sustainability
- Uncategorized

ROUSE'S - U.S.

- 60 Stores in LA, MS & AL
- Promotion dates: Dec 2018
- Sales contest across entire chain
- Product form: Alaska coho salmon and cod
- Pricing: Salmon \$9.99/lb Cod \$7.99/lb
- Promotion Sales Lift:
 - 2017 \$304,350
 - 2018 \$700,799
 - 130% increase



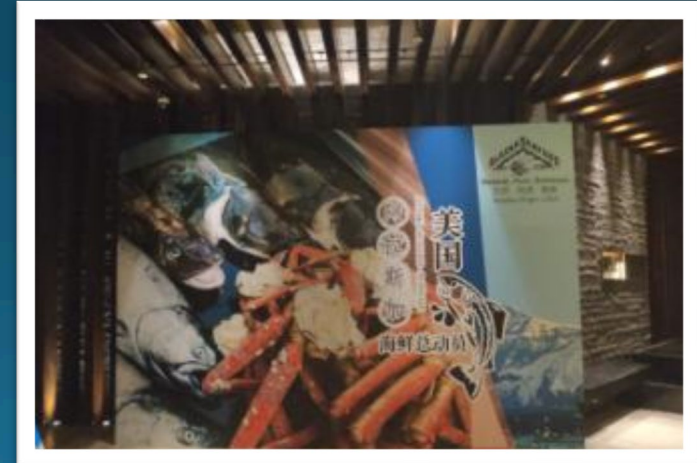
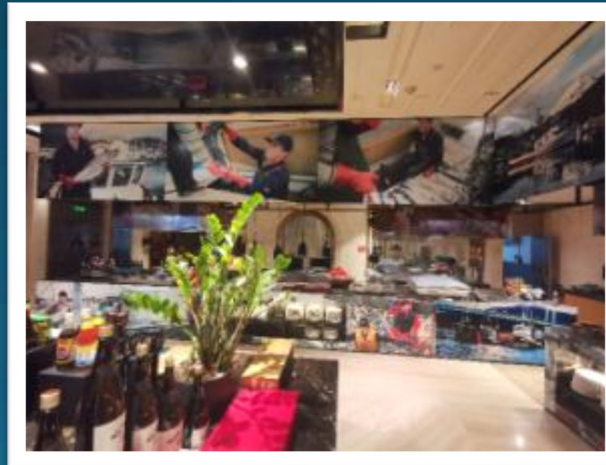
COOP SAPPORO - JAPAN

- 108 Stores in Japan
- Promotion dates: August 2019
- Demos at 10 stores
- Product form: Alaska sockeye salmon, sujiko sockeye salmon roe, pollock roe, pollock surimi, pollock fillet
- Promotion Sales Lift:
 - 2018 \$3,579,340
 - 2019 \$4,327,650
 - 120% increase



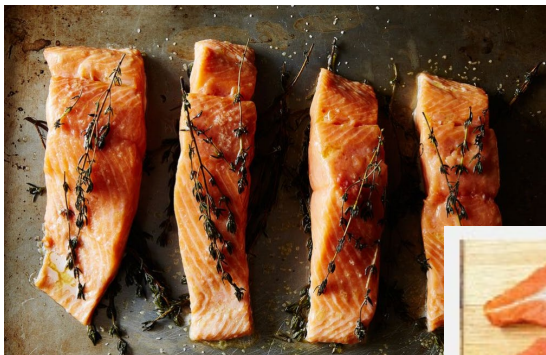
HILTON HOTELS AND DOUBLE TREE - GUANZHOU

- 6 hotel locations in Guanzhou
- Promotion dates: May 6 – June 30, 2019
- Demos at 10 stores
- Products: Alaska cod, sablefish, pollock, yellowfin sole, keta, snow crab
- Promotion Results: 42,220 kgs + hundreds of thousands of diners exposed to Alaska seafood branding



FY19 U.S. CONSUMER PR HIGHLIGHTS

FOOD52 How to Cook Fish Like an Alaskan Fisherman



HOW - TO S2 • E21

How To Fillet a Fish with an
Alaskan Fisherman

1M views • 4 months ago


MATADOR
network

SUSTAINABILITY

Alaska is the sustainable fishing model the world needs



Go Sustainable

Shopping responsibly for seafood can flummox even the savviest consumer. Farmed fish are often raised in crowded pens, while some wild-caught species are overfished and risk extinction. To navigate these tricky waters...

CHECK THE MONTEREY BAY AQUARIUM SEAFOOD WATCH LIST

It's not just the species that matters: It's a fish's origins, too. Most cod from the Atlantic are overfished, for example, but those from the Pacific off the coast of the U.S. and Canada get a green light. And the info is constantly changing. The site (seafoodwatch.org) has state-by-state and national guides, and the Seafood Watch app provides real-time updates and news alerts.

BUY FROM ALASKA, ICELAND, AND NORWAY The regulations in these locations are strict—and strictly enforced—so any wild catch from them is fair game.

FOR FARMED FISH, STAY DOMESTIC Sustainable wild-caught fish are preferable to farm-raised, which are kept in pools and require antibiotic treatments and other additives to prevent infections. But farmed fish can be a fine option, especially tilapia, carp, Arctic char, and catfish. Just make sure to buy from U.S. farms, where conditions are closely monitored.

easy dinner, fin it to win it. The other (other) white meat is much easier to cook than you might think—and there are so many mouthwatering options in the sea (and lake, and river). Learn how to shop for and store the best catch, then bone up on the classic techniques, from steaming to sautéing to poaching to roasting in parchment. Still nervous? Keep reading; you'll do swimmingly.

PHOTOGRAPHS BY RYAN LIEBE | TEXT BY MICHELLE SHIH | RECIPES BY GREG LOFTS



THANK YOU



Wild, Natural & Sustainable®