

RAISING THE VALUE: Alaska Seafood Marketing Update

March 3, 2022
House Fisheries Committee

Jeremy Woodrow, Executive Director
Alaska Seafood Marketing Institute





What is ASMI?

ASMI is a public-private partnership directed by a Governor-appointed Board of Directors: five processors, two commercial harvesters, and 10 Species and Operational Committees.

As Alaska's official seafood marketing arm, ASMI maximizes the economic value of the Alaska seafood resource by:

- **building and protecting the Alaska Seafood brand**
- **developing and creating markets for Alaska seafood products**
- **working directly with the seafood industry to maximize efforts**

Celebrating 40 years!



ASMI Funding

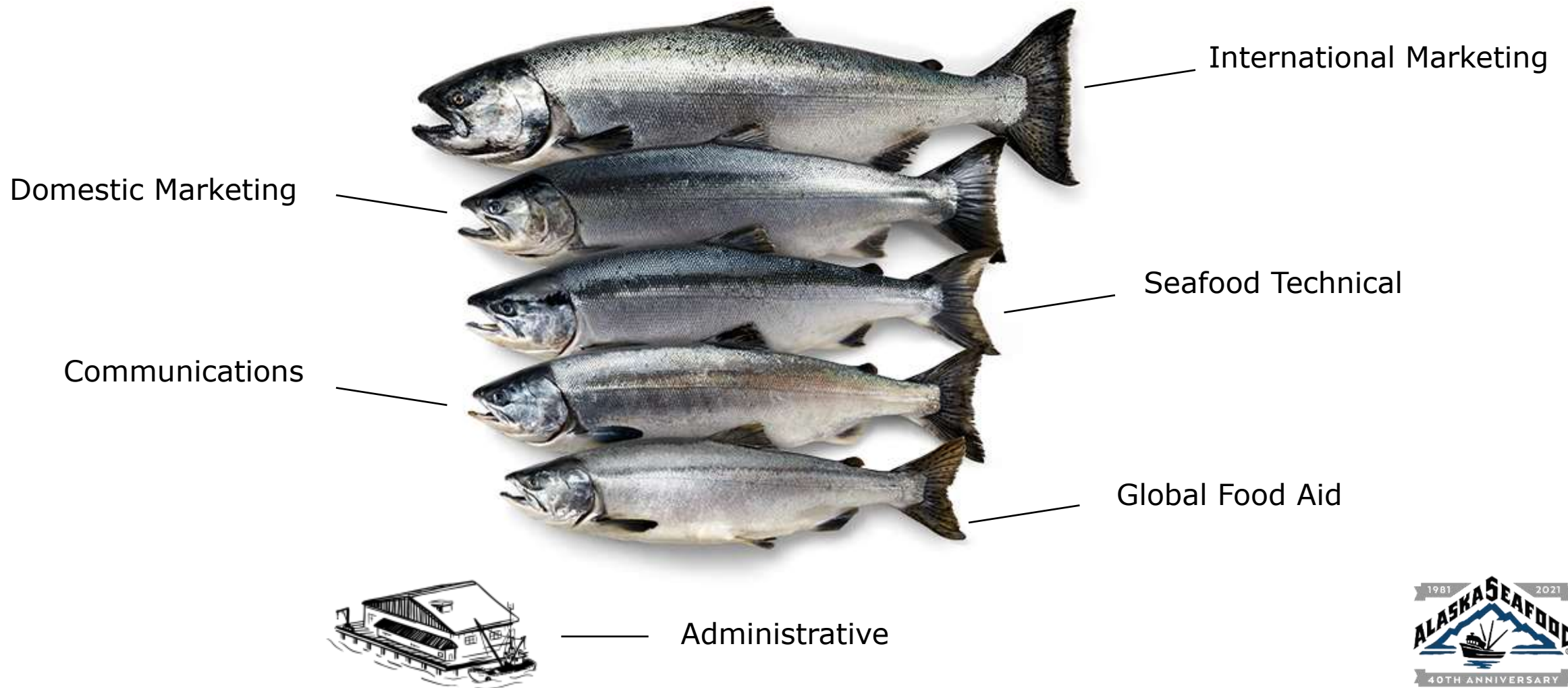


FY22 Budget Authority

- **Seafood Marketing Assessment**
 - \$15,995,300 (0.5% of ex-vessel value)
- **Federal Funds**
 - \$10,130,800
 - Market Access Program (MAP)
 - Agricultural Trade Promotion Program (ATP)
 - Saltonstall-Kennedy Grant (SK)
 - Cochran Fellowship
 - Emerging Markets Program (EMP)
 - Quality Samples Program (QSP)
- **Other Federal**
 - \$7,000,000 (American Rescue Plan Act)
- **\$0 General Fund**

FY22 Spend Plan: \$19,000,000

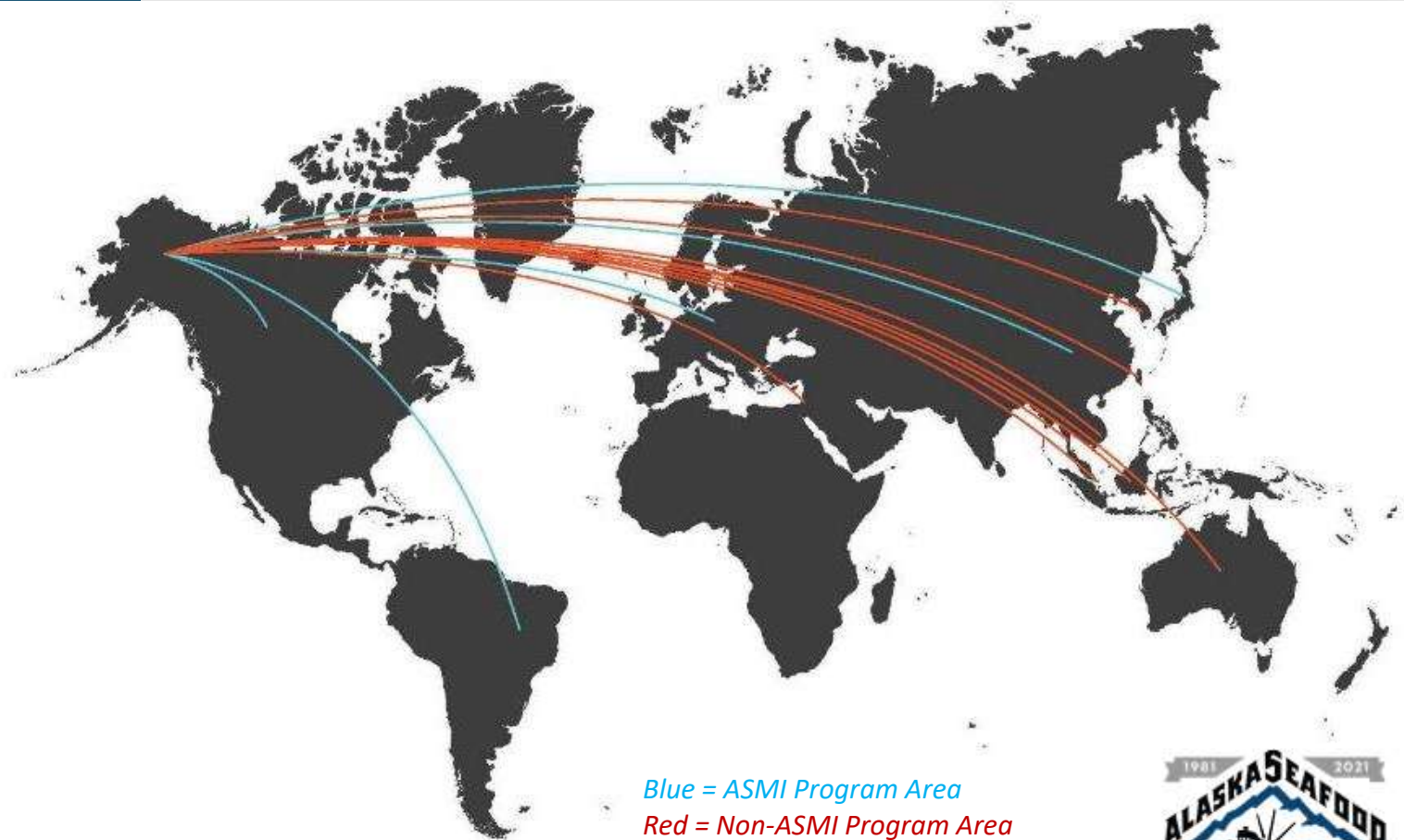
Core Programs



Nine Program Areas in 42 Countries:

- Japan
- China
- South America
- Northern Europe
- Central Europe
- Southern Europe
- Western Europe
- Eastern Europe
- Southeast Asia

INTERNATIONAL MARKETING



DOMESTIC MARKETING



United States and Canada

- Foodservice
- Retail
- Distributors



Last year the Domestic Program Conducted Promotions with ...

- 35,000 retail and e-commerce stores
- 18,000+ foodservice establishments



COMMUNICATIONS & PR





GLOBAL FOOD AID

Seeks wild Alaska Seafood inclusion in domestic and international food aid programs

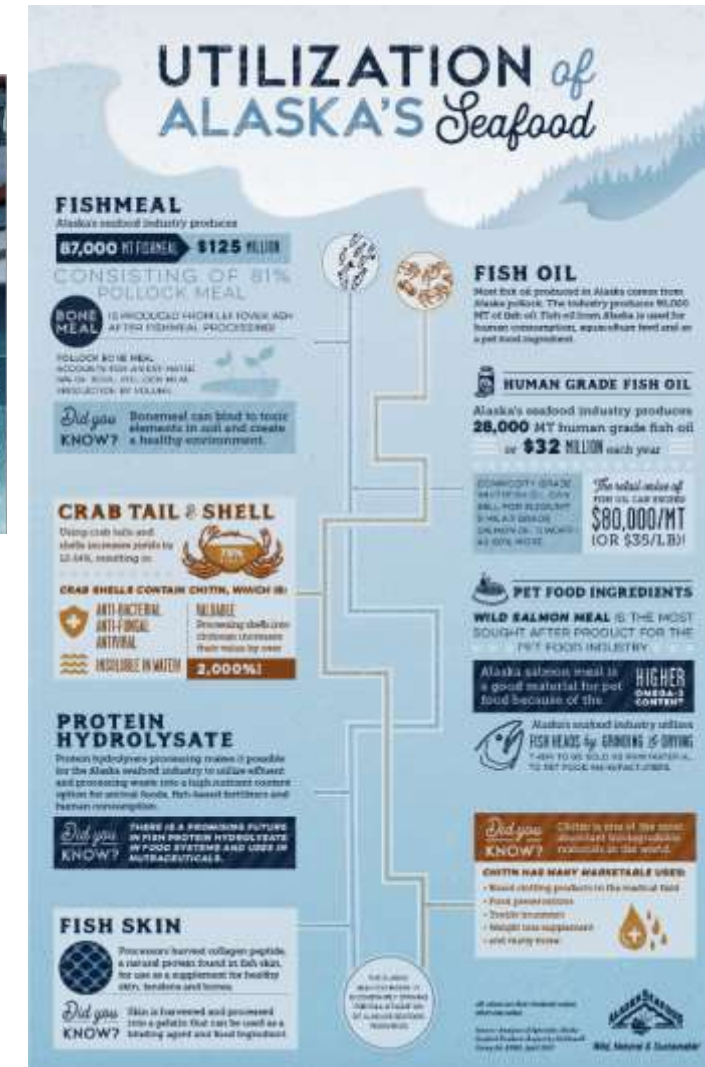
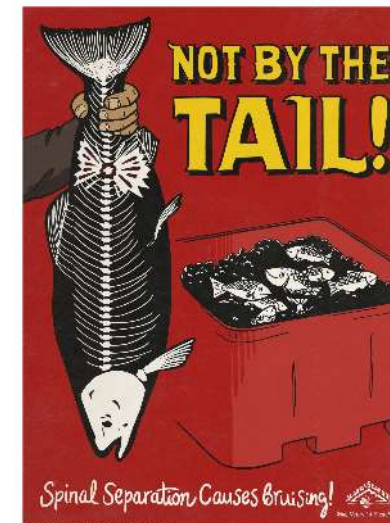


TECHNICAL RESEARCH & RESOURCES

QUALITY handling guides and resources for processors and fishermen

BUYERS GUIDES help distributors, chefs, retailers learn more about Alaska's seafood.

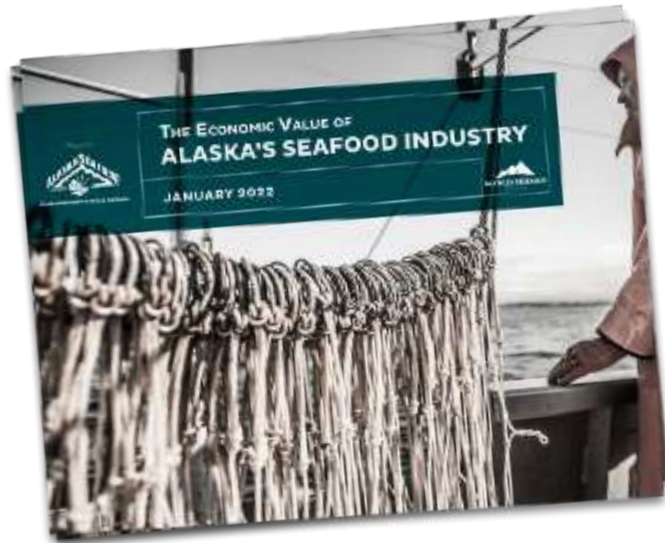
RESEARCH AND REPORTS on health, nutrition, utilization and industry efficiency





Value of Alaska Seafood

Economic Impact



[Download the Report](https://alaskaseafood.org)
@ Alaskaseafood.org

62k

**The seafood industry directly employs over
62,000 workers, including over 27,000
Alaska residents**

1st

**Seafood directly employs more workers in
Alaska than any other private sector
industry**

\$15B

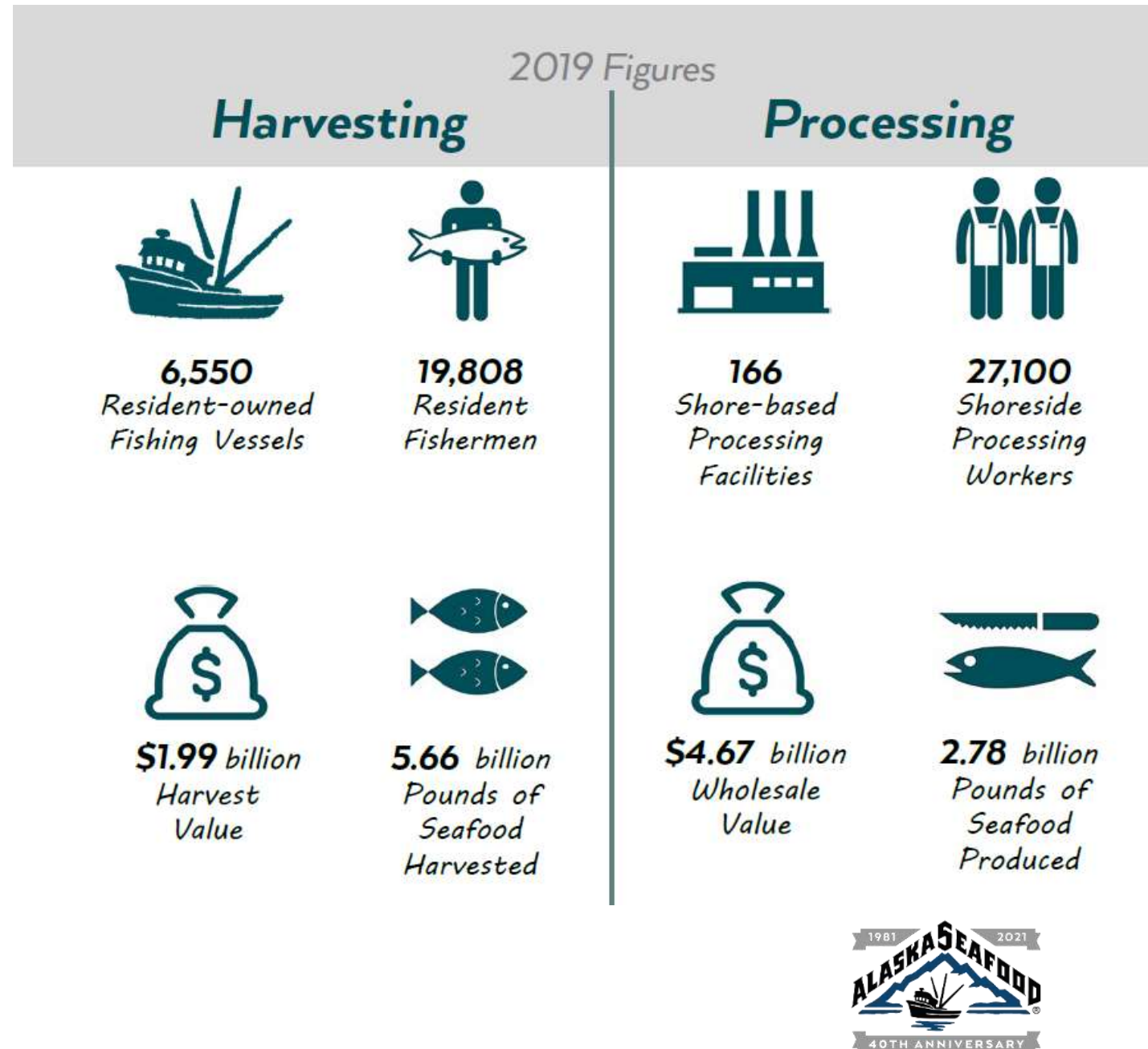
**Alaska seafood created \$15 billion in
economic output and nearly 100,000 jobs
nationally in 2019**

Alaska Seafood Delivers

- \$5.7 billion in economic output to the Alaska economy in 2019.
- 37,400 FTE jobs & \$2.2 billion of labor income to the state's economy in 2019.
 - 10% of Alaska employment during this period.
- Broad economic distribution. From Kotzebue to Ketchikan - an estimated 26,400 Alaska residents were directly employed in the industry in 2019.

Percent of Ex-Vessel Value & Volume		
Species	Value	Volume
Salmon	36%	15%
Pollock	24%	59%
Crab	11%	1%
Pacific Cod	10%	8%
Halibut & Sablefish	8%	1%
Flatfish & Rockfish*	8%	14%
Other Species	1%	1%

*Includes Atka mackerel.



2020 Was Rough

Partial Recovery in 2021

Key Challenges Loom

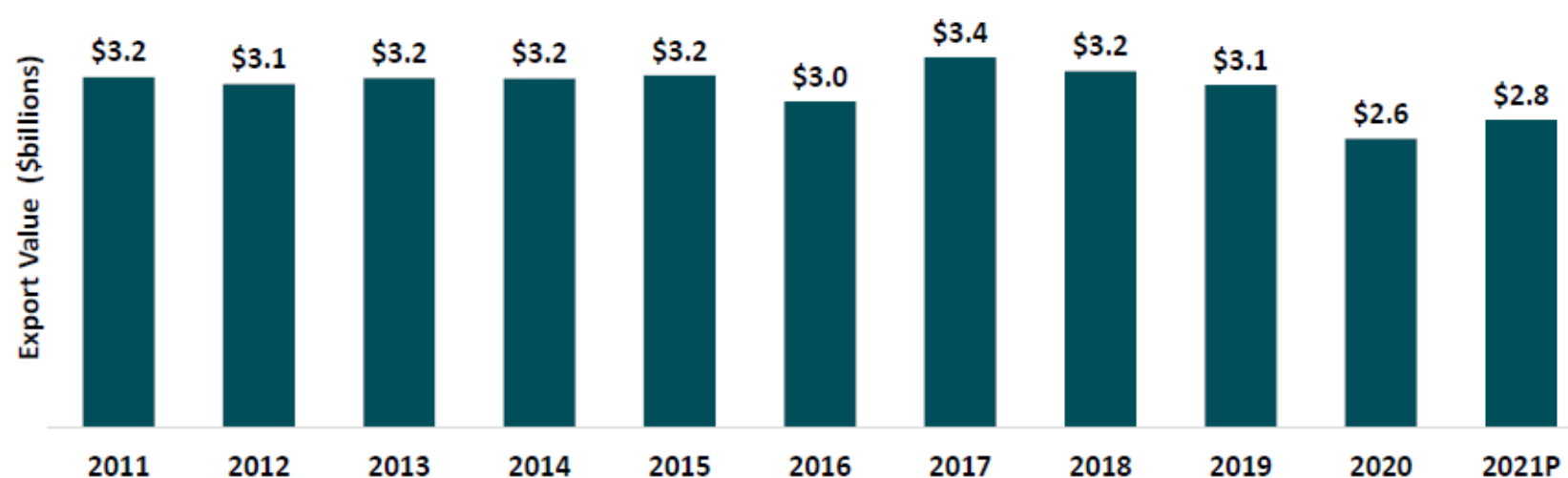
- Supply Chain Logistics & Rates
- Increased Labor Costs
- COVID Mitigation
- Uncertainty
- Competitive Global Market

OPTIMISM IN 2022!

Key Figures	2019	2020 (see note)
Skippers & Crew	31,300	24,200
Skippers	8,800	7,700
Crew	22,500	16,500
Percent Alaska Residents	63%	57%
Fishing & Related Vessels	8,900	8,500
Ex-Vessel Value (\$millions)	\$1,988	\$1,457
Percent to Alaska Residents	39%	37%
Harvest Volume (millions pounds)	5,658	5,056

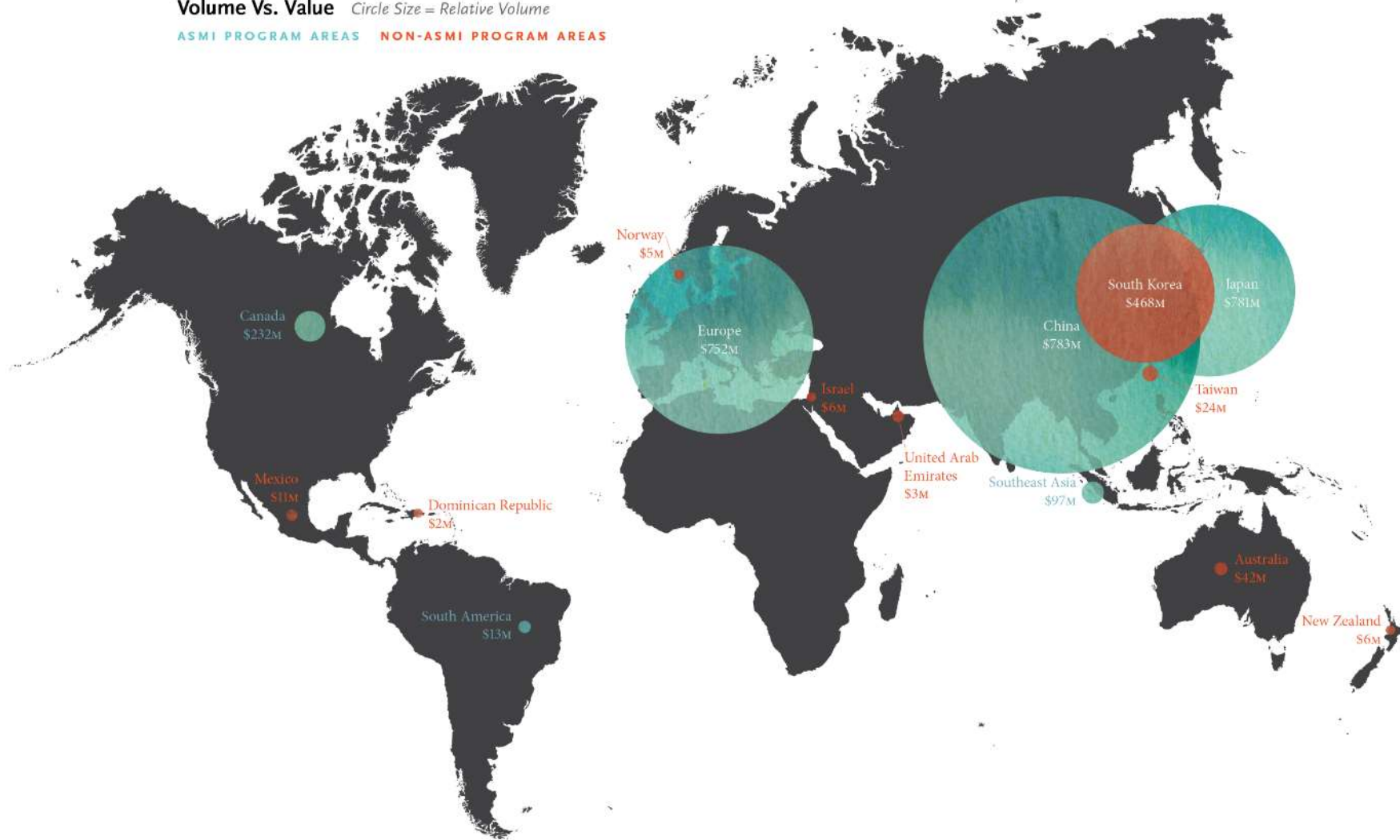
Workforce	2019	2020 (see note)
Peak Monthly Emp.	20,244	15,954
Avg. Monthly Emp.	9,095	8,114
Total Worker Count	27,100	23,700
Alaska Residents	6,568	4,958
Total Earnings	\$491 million	\$457 million
Alaska Residents	\$162 million	\$140 million

Value Added	2019	2020 (see note)
Ex-Vessel Value	\$1.99 billion	\$1.46 billion
First Wholesale Value	\$4.67 billion	\$3.67 billion
Value Added by Processors	\$2.68 billion	\$2.21 billion



Volume Vs. Value Circle Size = Relative Volume

ASMI PROGRAM AREAS NON-ASMI PROGRAM AREAS



About 75% of Alaska seafood production exported annually to 100 countries

U.S. is largest market: 25-30%

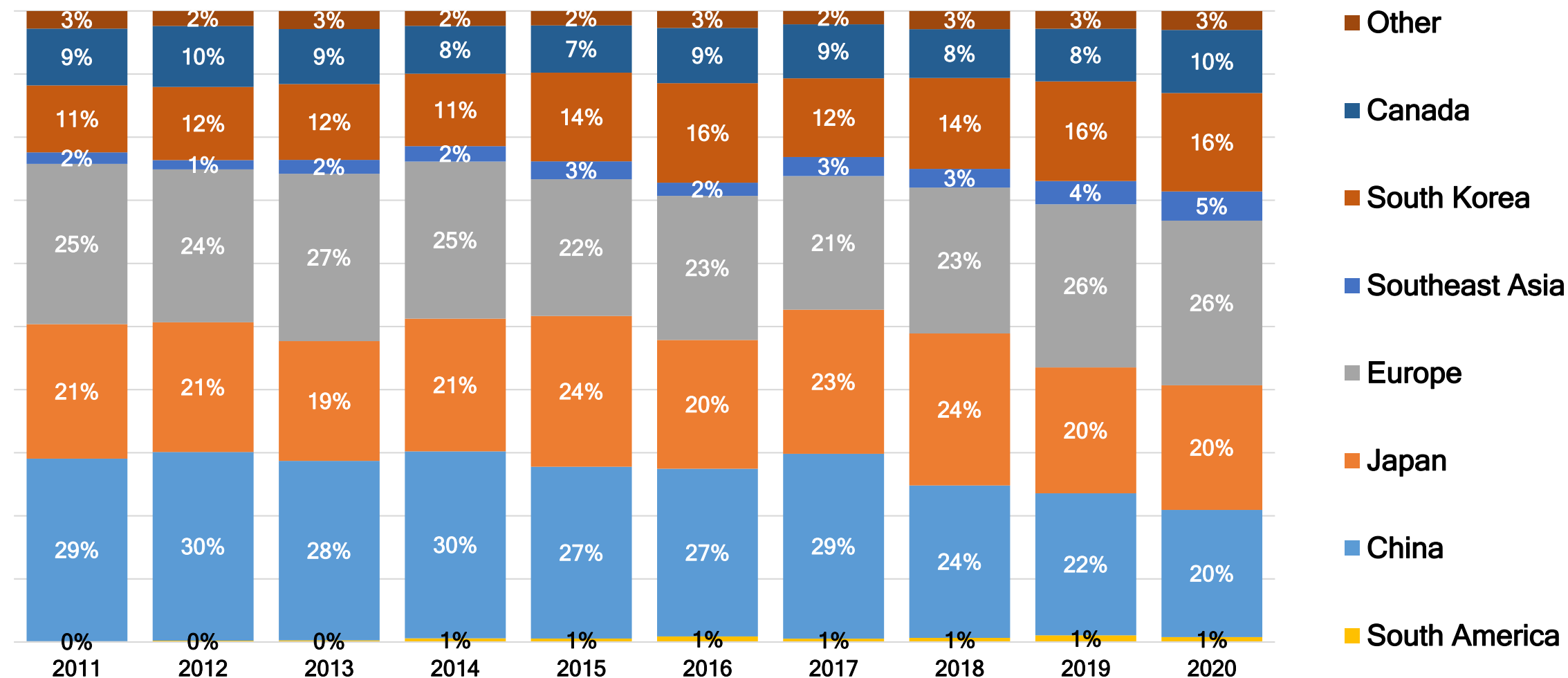
China/South Korea largest trading partners; primarily reprocessing

Japan/Europe largest direct foreign markets

90% of pollock, pink/keta salmon, and A80 species exported



Alaska Seafood Export Value by Region



Source: NOAA, compiled by McKinley Research.



Global Consumer Response to the Pandemic



27%

Ex-vessel harvest
value declined 27%
in 2020 due to
COVID-19

Key Covid-caused Market Disruptions To The Alaska Seafood Industry:

- Widespread closures in the global foodservice sector
- Shipping disruptions; more difficult and more expensive to get Alaska seafood to market
- Added costs for harvesters and processors ensuring the safety of their workers on fishing vessels and processing lines, and the Alaska communities where they operate





Shifts in Seafood

- Increase In Retail Sales, Especially In Ecommerce, Direct To Consumer Sales
 - U.S.: 122% yoy increase in seafood ecommerce sales
 - More people cooking at home more often; unprecedented opportunity for education
- Frozen Seafood Experienced Banner Growth
 - U.S. : 35% yoy sales growth in frozen seafood; 24% in fresh
 - *Retail sales growth did not make up for sales losses at foodservice*
- Consumers Looking For Immune-boosting, Sustainable Foods



COVID TRENDS

- RETAIL & E-COMMERCE
- HEALTH
- SUSTAINABILITY/ORIGIN
- CONVENIENCE
- HOME COOKING



Global Strategy

Connecting with Home Cooks - E-commerce - Health & Wellness
Emerging Trends - Transparency



71% of
people will
continue to
cook at home
after the
pandemic
ends

*Hunter

Still Cooking at Home...



Trusted Food Influencers



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Miso Alaska Sole & Yuzu Soba Noodle Bowl

Sole and soba noodles are a match made in heaven—or Alaska.

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by Dotdash Creative

0 COMMENTS

PRINT





It's easy to see how the 'bowl' became such a signature workday lunch. It's filling enough to power you through the afternoon and features a carb/veggie/protein formula that's endlessly versatile and customizable. Some of those variations, however, are just too good to

FOOD52

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Salmon Recipes

You've got dinner plans, because we have salmon ideas galore. These recipes let you cook your fish every which way—baked with olive oil, smoked on the grill, the list goes on. Wait till you try the pepper-crusted cakes.

FILTER BY:

Test Kitchen-Approved

Contest Winners

Featured

Meal

Dish Type

Ingredient


Special Consideration

Occasion

Preparation

Cuisine

656 matching recipes




Salmon Papillotes with Red Peppercorns, Lime and Fresh Herbs

By WHOLE30

★★★★★ (10)

SAVE




Salmon Moqueca

By WHOLE30

★★★★★ (10)

SAVE




Tarragon Potato Salad with Cured Salmon and Lemon

By LA DOMESTIQUE

★★★★★ (2)

SAVE




Corn Husk-Smoked Salmon with Grilled Corn Salsa

By AMBERLEA

★★★★★ (7)

SAVE




Seared Salmon with Cinnamon and Chile Powder

By WHOLE30

★★★★★ (10)

SAVE




Roasted Salmon with a Chestnut's Vietnamese Caramel

By WHOLE30

★★★★★ (10)

SAVE




Hot Smoked Salmon, Soba and Asian Greens Salad

By WHOLE30

★★★★★ (10)

SAVE



Smoked Salmon on Mustard-Chive and Dill Butter Toasts

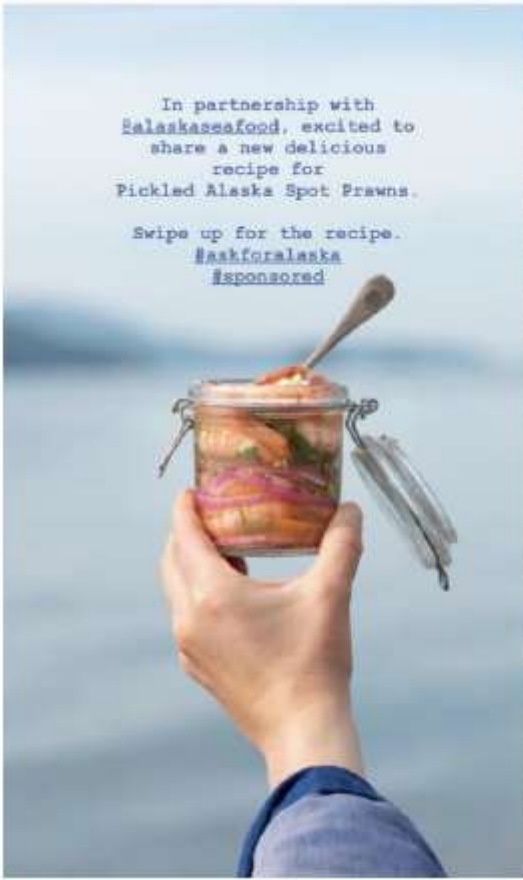
By WHOLE30

★★★★★ (10)

SAVE



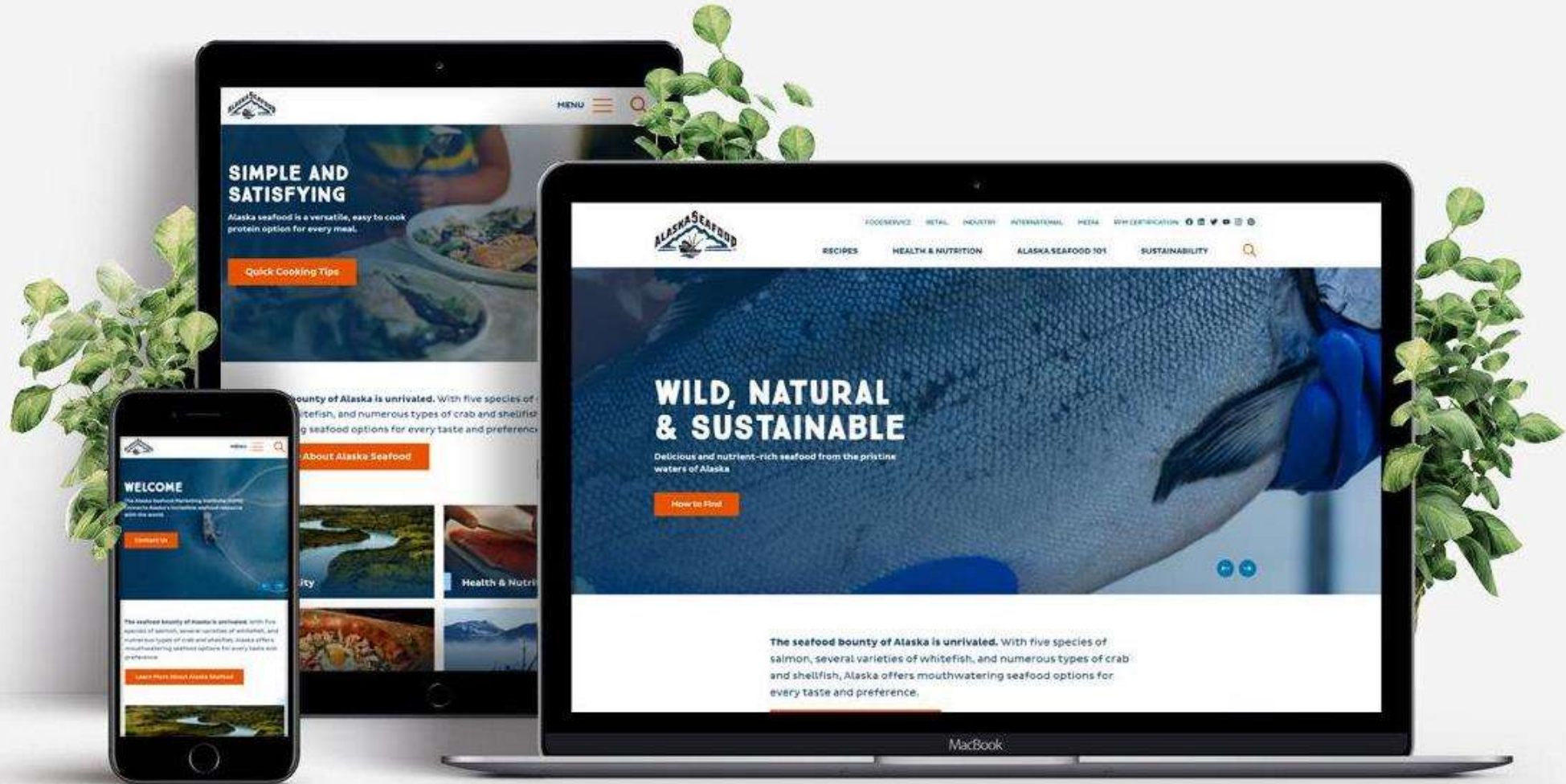
#AskforAlaska #sponsored
Crabcake Crusted Halibut



In partnership with
[@alaskaseafood](#), excited to
share a new delicious
recipe for
Pickled Alaska Spot Prawns.
Swipe up for the recipe.
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New Online Presence



E-commerce to Account for 20% of Grocery Market by 2026

*Mercatus/Incisiv





Calling out “Alaska seafood”
increases shoppers’ willingness
to purchase²

82%

say they’re motivated to
buy when it’s wild-caught²



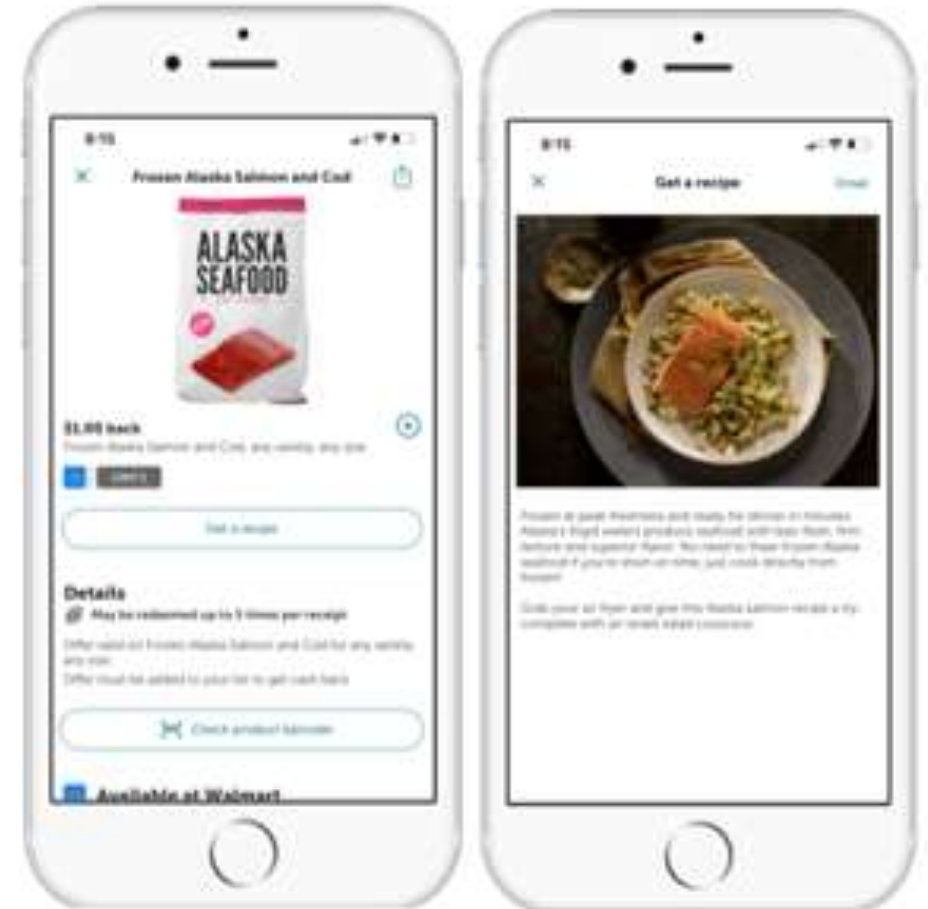
75%

of consumers are more likely
to purchase seafood with an
“Alaska Seafood” logo²



7 OUT 10 consumers prefer Alaska salmon vs. Atlantic salmon²

Retail Partnerships



Digital Partnerships



87% of
Consumers
Consider Their
Health and
Well-Being
when Making a
Food Purchase

*Datassential 2021

Health and Wellness Still Top of Mind



Alaska Seafood is Health Food





Choose flavor.
Choose wellness.
Choose wild
Alaska salmon.

SHOP NOW



Wellness and Nutrition
Facts on Alaska
Seafood

We've got your back – check out
our plethora of fact sheets,
whitepapers, and more.

[View Resources](#)



The Alaska Seafood Marketing Institute (ASMI) would like to help Retail Dietitians leverage the benefits of wild, natural and sustainable Alaska seafood through our retail promotional program. Click here to learn more www.alaskaseafood.org/retail and please reach out to Emily Giesler at egiesler@alaskaseafood.org.



Wildly Good!
Recipes and more at alaskaseafood.org

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MAGAZINE!





ALASKA SEAFOOD
DELICIOUSLY GOOD
FOR THE BODY,
MIND AND PLANET.

**EAT GOOD
FEEL GREAT**



CAMPAIGN OVERVIEW Alaska Seafood



OUR AUDIENCE



72%
Are the main grocery
shopper in the HH



60%
Seek quick and easy
meal solutions




63%
Are Healthy Living
Enthusiasts



39%
Regularly Purchase
Fish & Seafood

PREMIUM & SHOPPABLE LINKS





RECIPE FOR:
**Whole30
Fish Fajitas**

INGREDIENTS:

- 2 tablespoons avocado oil
- 1 pound cod
- 1 large white onion
- 3 garlic cloves minced
- 2 teaspoons chili powder
- 2 red bell peppers

[Get Ingredients](#)

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



**Kale Quinoa
Salad**

INGREDIENTS:

- 1/2 cup quinoa
- 5 cups curly kale
- 1 cup cucumber
- 1 cup red bell pepper
- Balsamic dressing


[Get Ingredients](#)

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*** / Fish / Alaskan Sockeye Salmon Fillets



SEAFOOD
Whole Catch, Wild-Caught
Fish, Alaskan Sockeye
Salmon Fillets (2 - 6oz)

Choosing the best seafood



Registered Dietitian Nutritionist Frances Largeman-Roth joined Taylor on Studio 3 to share the scoop on nutritional benefits of wild seafood from Alaska.

Satellite Media Tour

- 746M Impressions
- 1198 Placements



@TwistofLemons: Alaska salmon
135K impressions; 4.05% ER



@MarisaMoore: Alaska sablefish



Natural Holistic Wellness

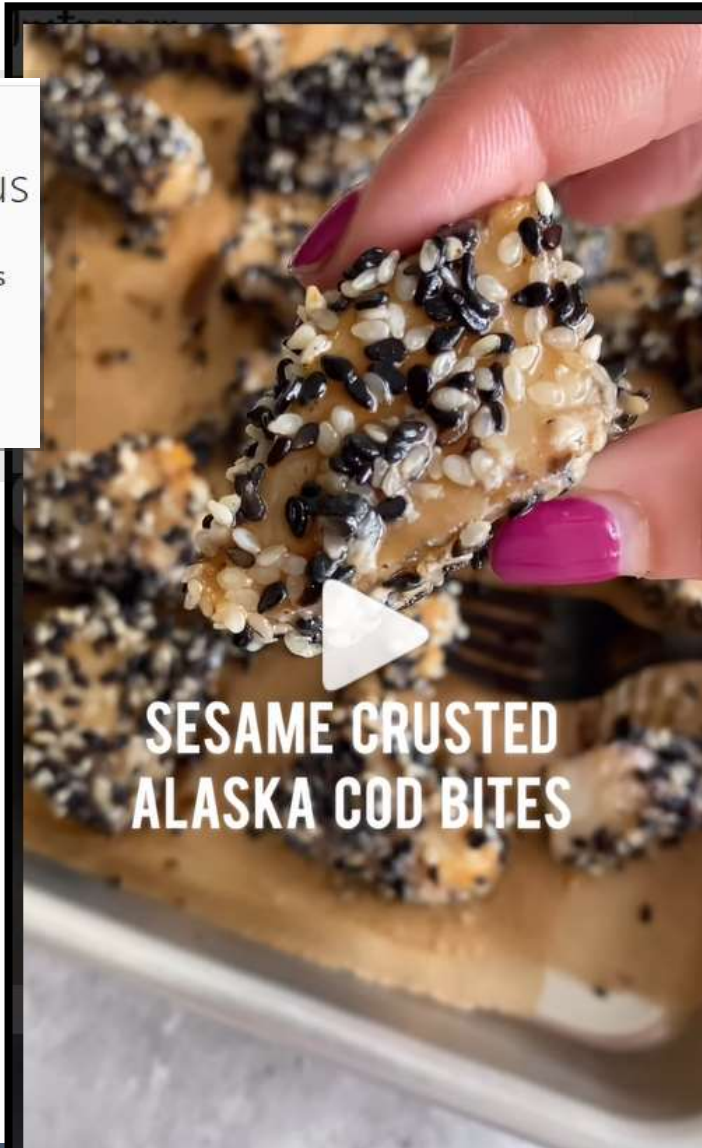


somethingnutritious

2,513 posts 142k followers

Gal Shua-Haim MS, RD
registered dietitian
easy, wholesome recipes

- **Health & Wellness have become priority topics in media coverage.**
- **Third party spokespeople and experts lend credibility.**



somethingnutritious • Following

Paid partnership with alaskaseafood
Original Audio



somethingnutritious sesame crusted Alaska cod bites with spinach citrus salad made in partnership with @AlaskaSeafood! #ad

I'm always looking for new ways to eat fish, and these sesame crusted Alaska cod bites did not disappoint 😊

this loaded salad is filled with nourishing ingredients like protein-rich Alaska cod, spinach, avocado and oranges 🍊 It's bursting with flavor and feel-good ingredients, and can even be made with Alaska salmon!

choosing wild seafood from Alaska means you're supporting generations of fishermen and their communities, while also consuming a healthy and sustainable protein! Alaska seafood is also good source of zinc, vitamin B12, and essential omega-3 fatty acids that are known for their anti-inflammatory properties 🐟

head to the link in my bio to get the full recipe!

<https://somethingnutritiousblog.com/sesame-crusted-cod-bites/>

#AskForAlaska #AlaskaSeafood #HealthyMealPrep #HealthyDinner #FishRecipe



Liked by tess.award and 442 others

OCTOBER 12



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BENEFITS OF SEAFOOD

[Nutrition Information](#)[Benefits of Seafood](#)

Heart Health

Regularly eating fatty fish reduces the inflammatory substances produced in the heart's arteries, improving their function, and Omega-3's from wild Alaska seafood give your heart a healthy heart.

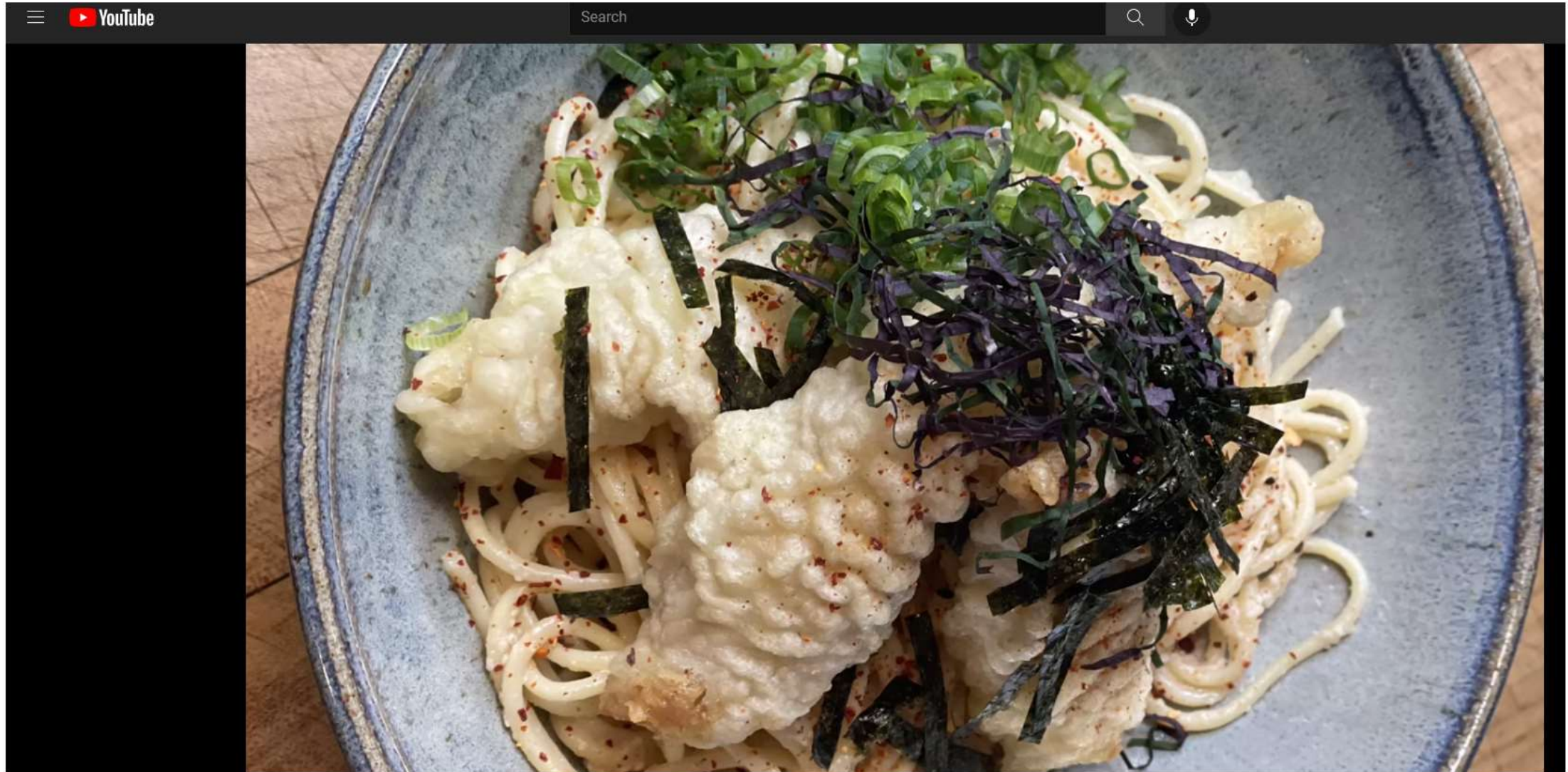
71% of operators consider global food “premium” and easy to command a higher price. Also, 57% of consumers want more comfort food.

*Datassential 2021

New Trends...
comfort, global,
holidays and
more.



Alaska Seafood is Global Cuisine



Chef Justin Sutherland Prepares Mentaiko Pasta with Tempura Fried Alaska Pollock

**63% of operators who have
increased global offerings are
motivated by expanded variety**

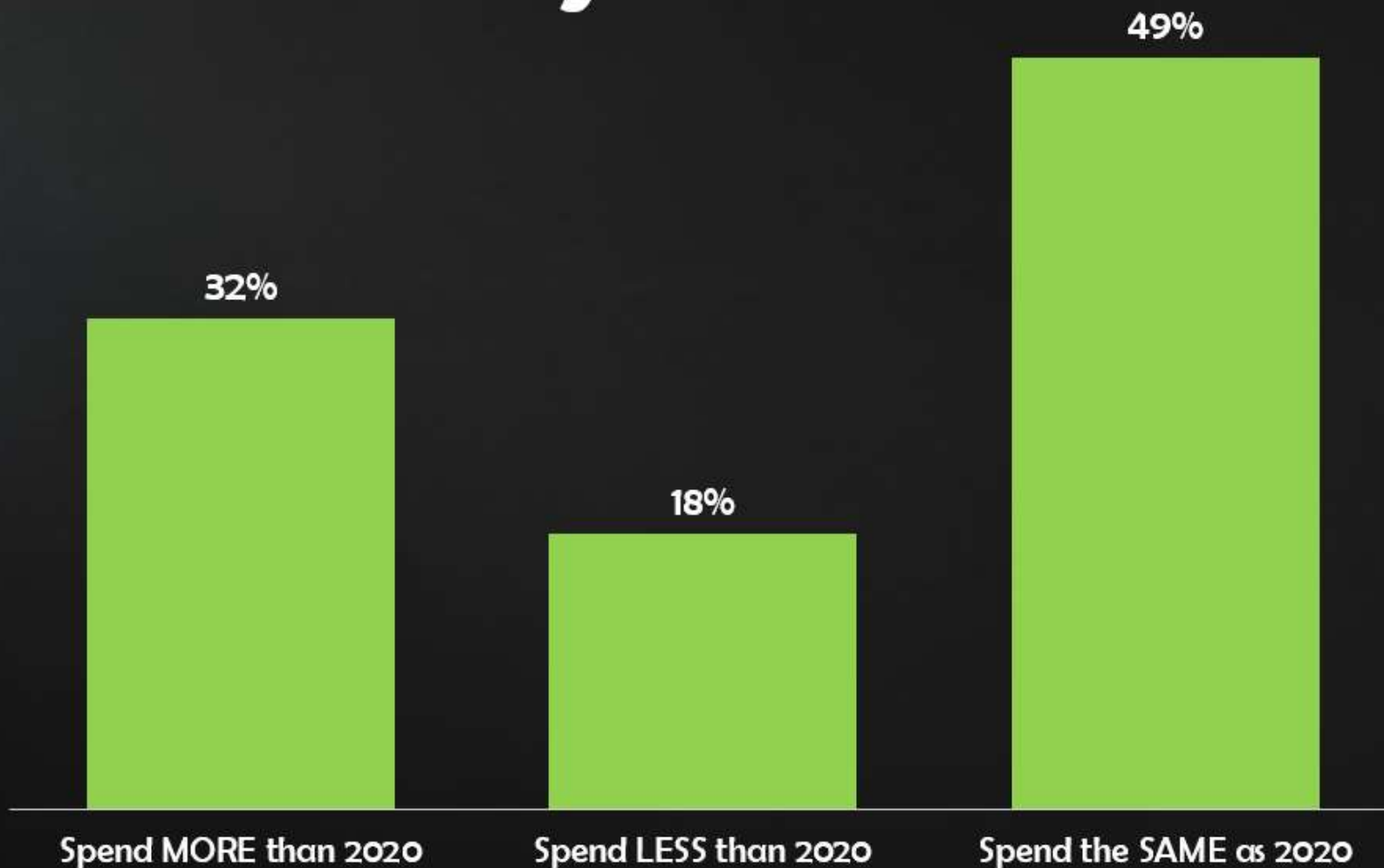


Holiday Occasions



TK
TK

December Holiday Plans.

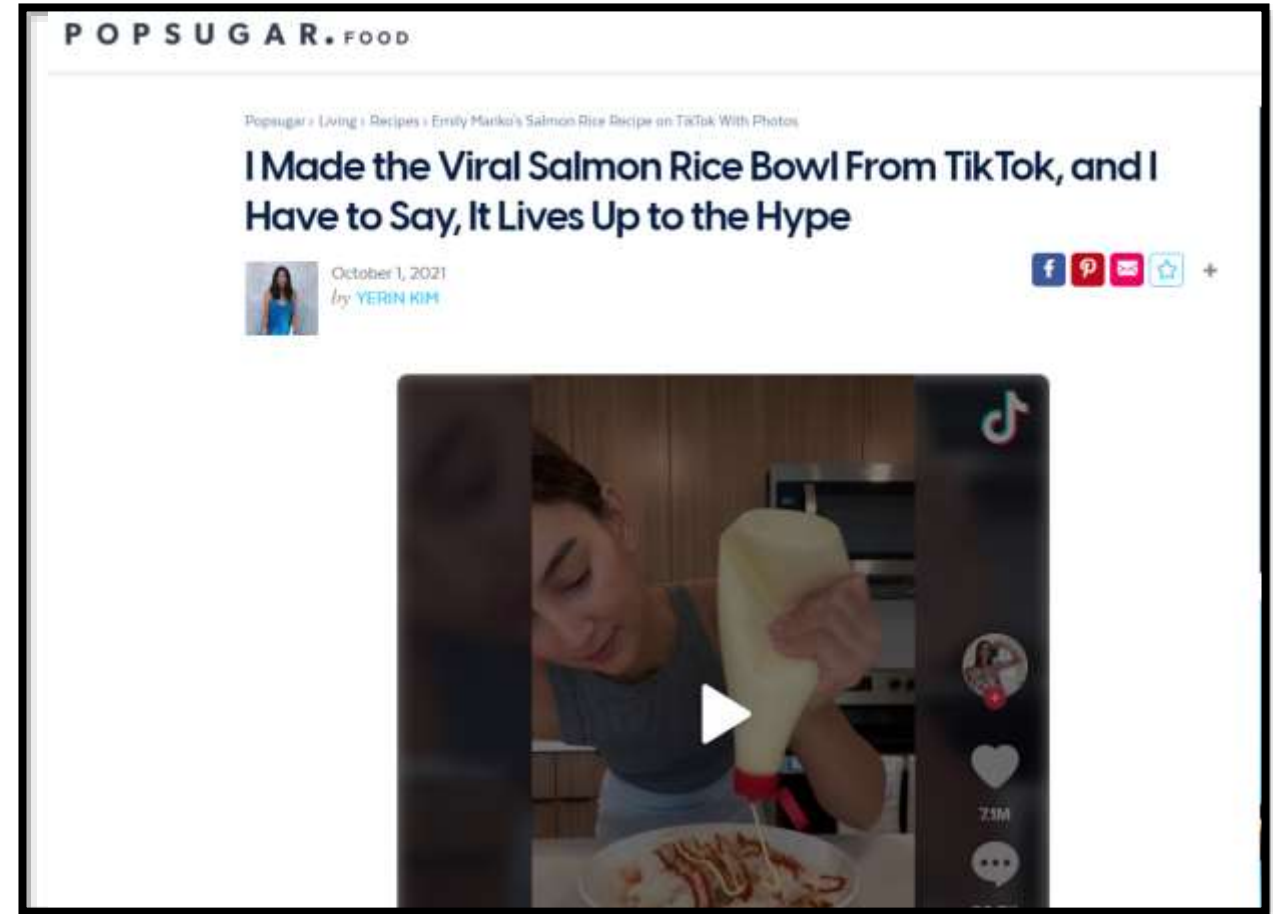


Social Influencers

73% of consumers make purchases after seeing it on social,

61% trust subject matter experts as spokespeople, and

80% will continue to use platforms they started using in 2020, including TikTok.







January 27 – March 4

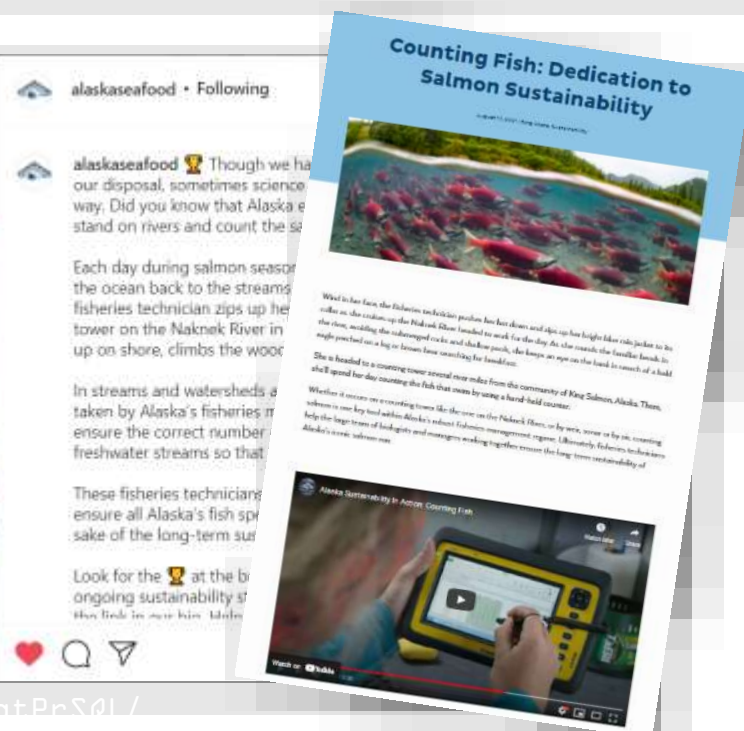
39 Million Impressions as of Feb. 17



75% of
consumers
want to be
more
knowledgeable
about seafood.

*FMI Power of seafood





Technical Communication

Re: Closure of Bering Sea Red King Crab Fishery, Reduction of Bering Sea Opilio Steud, and Downgrade of Alaska Chalk Fisheries Status by Monterey Bay Aquarium Seafloor Trawl in Latest Draft Assessment

INTERNAL TALKING POINTS

Situation Overview:

- In June, the Monterey Bay Aquarium (MBAQ) Seafloor Trawl program announced a draft crab assessments that would downgrade the status of several "unranked" Alaska crab fisheries (long, Tanner, and snow) from "green" to "red" or "yellow," with the particular stocks of concern being Bristol Bay red king crab, (The active list of yellowed stocks include):
 - o Golden king crab
 - o Bristol Islands (Yellow)
 - o Aleutian Islands (Red)
 - o Southeast (Red)
- o Red king crab
- o Bristol Bay (Yellow)
- o Southern Tanner Crab
- o Eastern Bering Sea (Yellow)
- o Southeast (Red)

In September, the 2021-22 Bristol Bay red king crab fishery was closed due to surveying indicating that the number of females was below the acceptable threshold for spawning a fishery. Bristol Bay red king crab is managed primarily by the Alaska Department of Fish & Game with federal oversight from the National Marine Fisheries Service.

In mid-September of 2021, MBAQ provided results of its annual stock survey. Opilio crab in the Bering Sea have undergone a significant mortality event likely from climate impacts and/or disease resulting in stock reductions in stock levels below last survey in 2019. The low stock status may place opilio in the "overfished" category (despite non-fishing factors being identified as the cause of decline).

- o Bristol Bay red king crab and Bering Sea opilio crab are both independently certified as Alaska IPF for sustainable management.

MBAQ Draft Assessment - Internal Talking Points

- o Results in the current report are received by several stocks that are not contributing to the commercial harvest volume. These stocks could be reduced as they have fish, or no new harvest pressure. Bristol Bay red king crab will likely be the next stock to have last survey in 2019. The low stock status may place opilio in the "overfished" category (despite non-fishing factors being identified as the cause of decline).
- o In previous draft crab assessments from Seafloor Trawl as "green," meaning in best course. No further harvesting agreement if management has been altered in that time. Crab stocks are known to fluctuate, crab in

- Internal talking points
- Consumer and Trade Q&A



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Resource Type



Audience



Easy
Access in
the Footer



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CONTACT

ASMI staff are currently working remotely but readily available to connect with you by phone or email. Find the ASMI staff directory list [here](#).

Connect With Us





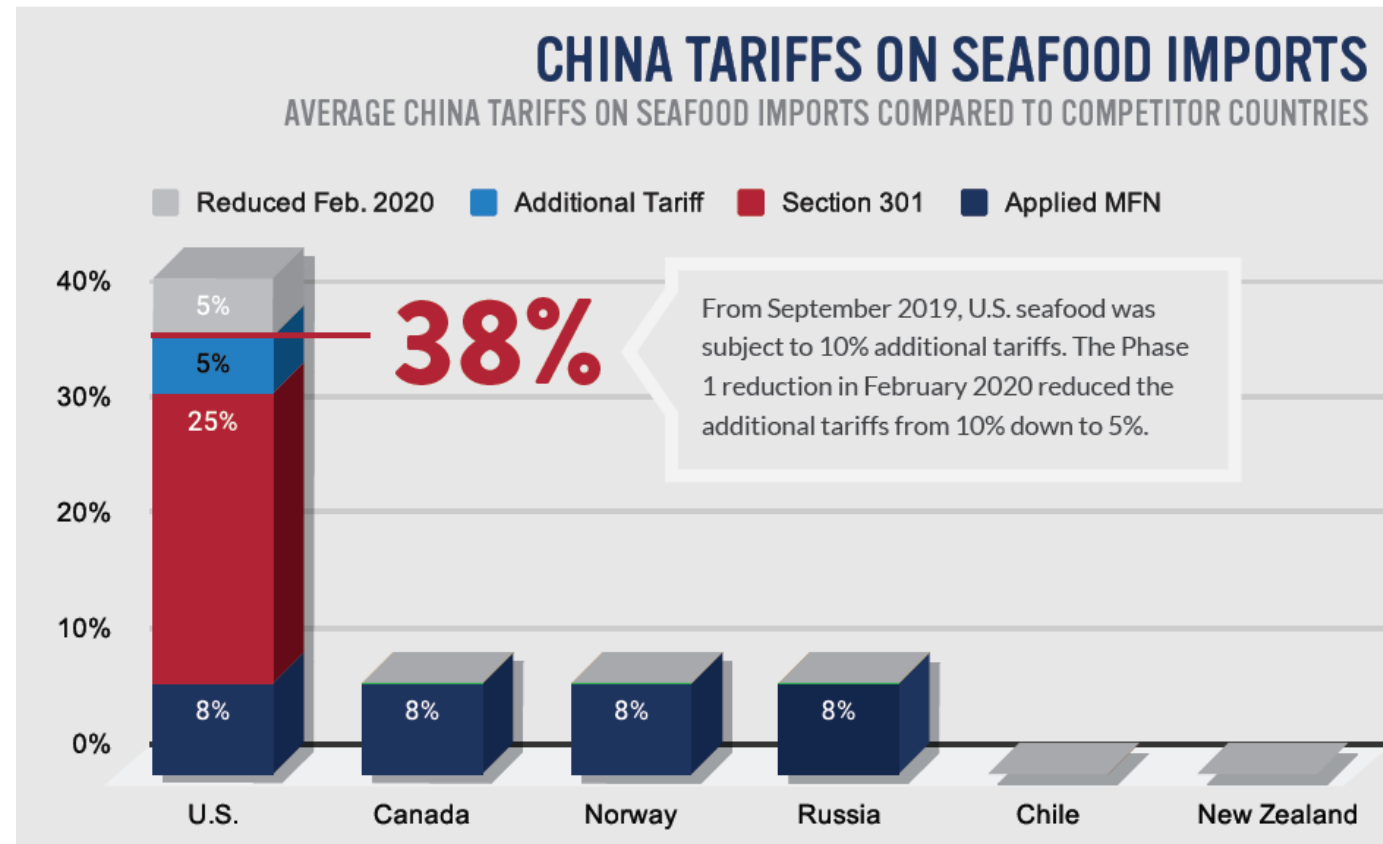
Challenges



Market Development

- Exports to China down \$450M since 2018
 - Was #1 Export Market Prior to 2018
 - A 20-year investment by Alaska Seafood Industry & ASMI
- Growing Southeast Asia
- Expanding South America
- Eastern Europe?

Alaska Seafood Needs Global Market Diversification Now More Than Ever



Global Competition

- Opportunities & Challenges not unique to Alaska Seafood
- Norwegian Seafood Council global budget 3x larger than ASMI
- Russia investing \$7 Billion into its fisheries
 - Processing, New Vessels, Cold Storage & Promotion
 - “New Alaska”



COVID Challenges Still Exist

- Foodservice Still Hasn't Fully Recovered
 - Responsible for 70% of seafood purchases prior to pandemic
- Supply Chain & Global Logistics a Mess
- Inflation
- Cost to Execute Fisheries
- Uncertainty





Wild, Natural & Sustainable®

Thank You

