

Alaska Seafood Marketing Institute

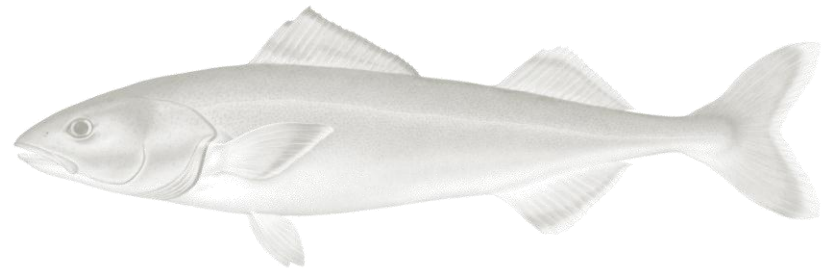


Wild, Natural & Sustainable®

*Celebrating 30+ years of successful partnership between the
State of Alaska and the Alaska seafood industry!*

The Codfish

*The codfish lays ten thousand eggs,
The homely hen lays one.
The codfish never cackles
To tell you what she's done.
And so we scorn the codfish,
While the humble hen we prize,
Which only goes to show you
That it pays to advertise.*



Alaska's Seafood Industry

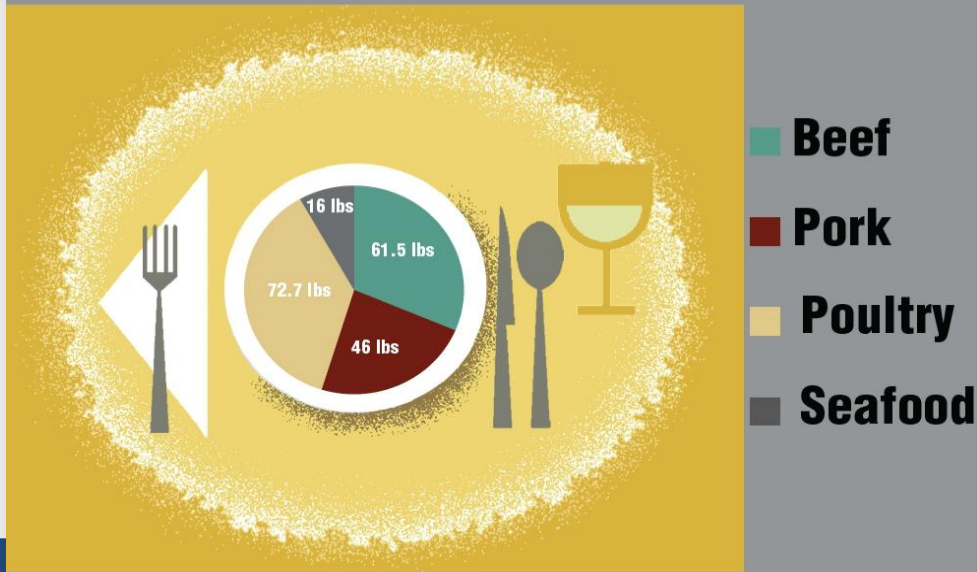


- Generated about \$79 million in state taxes and fees, in addition to local fish taxes in fiscal year 2009
- Through direct, indirect and induced effects, contributed a total of \$4.6 billion to Alaska's economic output in 2009
- Generated more than 80,800 jobs and \$1.45 billion to labor and income
- Led all states in terms of both volume and ex-vessel value of commercial fisheries landings in 2010, with total of 1.91 million metric tons (MT) worth \$1.7 billion
- Had one of the best seasons on record in 2010 with almost 170 million fish harvested in Alaska, the 11th highest number since statehood

Source: Northern Economics, DOR, ADFG



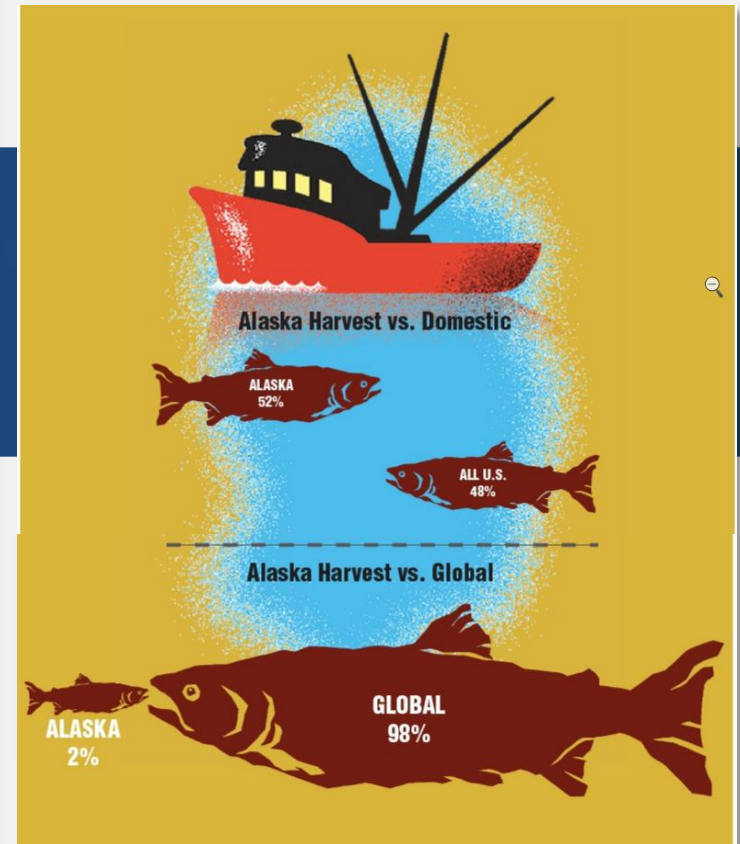
U.S. Per Capita Protein Consumption 2009



Source: USDA

Over 4.2 billion pounds of seafood were harvested from Alaskan waters in 2010.

TOTAL SEAFOOD VOLUME



SALMON PRODUCTION



Alaska Salmon
vs. Domestic

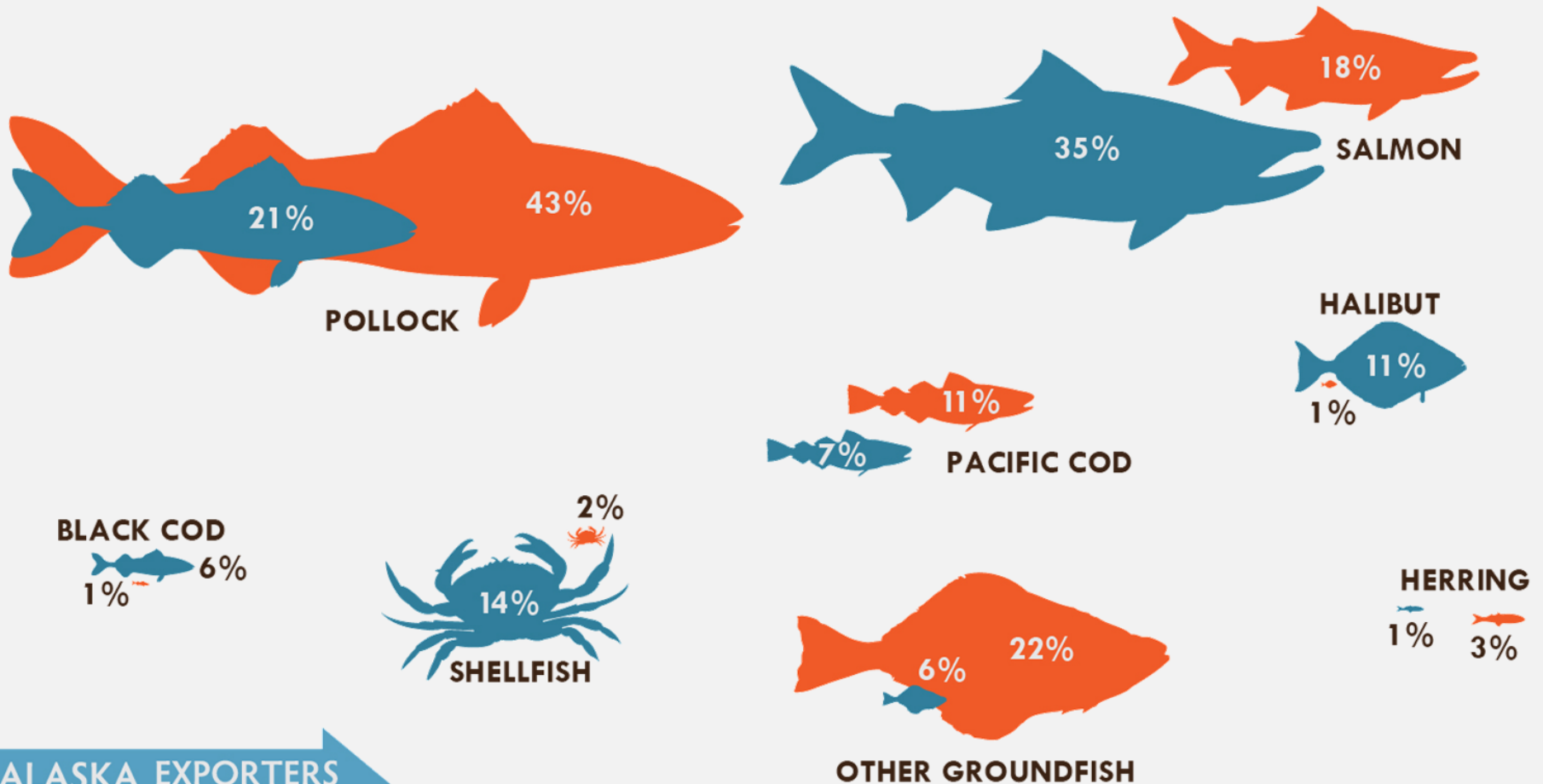
Alaska Salmon vs.
Global



Wild, Natural & Sustainable®

ALASKA SEAFOOD PRODUCTION BY TYPE

BLUE = VALUE ORANGE = VOLUME



ALASKA SEAFOOD EXPORTERS TO THE WORLD

BASED ON DATA FROM 2010

Impact on Rural Communities

The seafood industry is a central piece of rural economies, providing:

- Cash infusion to subsistence economies*
- Economies of scale that often dramatically reduce the cost of :
Utilities
Shipping
Goods & Services*
- Infrastructure essential to non-road communities*



What is the

Alaska Seafood Marketing Institute?

- A **Partnership** of public and private sectors
- A **Public corporation** that fosters effective alignment with industry marketing efforts
- A **Governor-appointed Board** of Directors: five processors, two commercial harvesters
- **Alaska's official seafood promotion arm**, supports Alaska seafood industry through promotion of Alaska seafood products, education and research



Wild, Natural & Sustainable®

ASMI Mission Statement

The Alaska Seafood Marketing Institute is a marketing organization with the mission of increasing the economic value of the Alaska seafood resource through:

- *Increasing positive awareness of the Alaska Seafood brand,*
- *Collaborative marketing programs that align ASMI and the industry marketing efforts for maximum impact within the food industry,*
- *Long-term proactive marketing planning,*
- *Quality assurance, technical industry analysis, education, advocacy and research,*
- *Prudent, efficient fiscal management.*



Lead by Industry

Board of Directors - 7 members (5 processors, 2 harvesters)

Joe Bundrant, Chair, Trident Seafoods

Bruce Wallace, Commercial Harvester

Barry Collier, Peter Pan Seafoods, Inc

Jack Schultheis, Kwik'Pak Fisheries

Kevin Adams, Vice Chair, Commercial Harvester

Mark Palmer, Ocean Beauty Seafoods

Dennis Guhlke, Icicle Seafoods, Inc.



*Board of Directors/Customer Advisory Panel
Cordova, AK – May 2011*

- *ASMI promotes all species of Alaska seafood, under the “Alaska” brand.*
- *AS 16.51.110 prohibits ASMI promoting seafood by geographic origin other than from the state generally, geographic region of the state, or specified brand name.*
- *Alaska Constitution -Article 8, Section 4*

“Sustained Yield – Fish, forests, wildlife, grasslands, and all other replenishable resources belonging to the State shall be utilized, developed, and maintained on the sustained yield principle, subject to preferences among beneficial uses.”



ASMI Builds ‘Alaska’ Brand



Wild, Natural & Sustainable

Consumers associate the following descriptors with "Alaska".

"Fresh Seafood"

"Tastes Great"

"High Quality"

"Natural"

Alaska Seafood is the second most commonly specified brand on U.S. menus.

Source: TRD Frameworks, 2009

The Alaska Brand



*Wild, Natural & Sustainable**



Alaska Seafood Audience

FY11 marked a shift in target audience to address both the current Boomer target audience and next generation of best Alaska seafood consumer, Gen Y.

Boomer

Consumer Research: 610 interviews, ages 45-54, college education, household income of \$100,000+

- Eight in ten Boomers believe it is important to know the source or origin of the seafood they plan to purchase (81% somewhat + very important).*
- Seven in ten want to know the seafood is environmentally sustainable (73% somewhat + very important) and is naturally caught, or wild (71% somewhat + very important).*
- Boomers feel either a certifying or an environmental group would be the most likely types of organizations to give an accurate assessment of seafood sustainability.*

Gen Y

Consumer Research: 759 interviews, ages 25-30, college education, household income of \$50,000+

- 65% prefer to eat wild fish or seafood vs. 8% who prefer to eat farmed fish or seafood.*
- The majority of Gen Y consumers believe it is important to know the source or origin of the seafood they plan to purchase (76%) and that the seafood is environmentally sustainable (74%).*
- Half of Gen Y consumers say they would prefer to purchase Alaska Salmon if given a choice – topping Atlantic Salmon by a nearly three to one margin.*

ASMI Domestic & International Programs

Retail Marketing

International Marketing

Consumer Public Relations

Foodservice Marketing

Seafood Technical

Global Food Aid

With hands-on guidance from its seafood industry board of directors and input from dozen of industry experts serving on operational and advisory committees, ASMI applies a range of strategies and tactics tailored to fit specific market segments in the United States and overseas.



Above: Tom Sunderland, ASMI Salmon & Retail Marketing Committees;

Far left: Izetta Chambers, ASMI Salmon Committee;

Left: Chip Trinen, ASMI Seafood Technical Committee



Domestic Retail Marketing

Program works to align with the Alaska Seafood Industry and retailers across the US to support their sales and marketing programs through in-store promotions, consumer advertising, public relations, and trade advertising.



Left: Constellation Wines; Middle: Winn Dixie; Right: ASMI Plated Salmon Shot



Domestic Foodservice Marketing

Program is designed to help commercial & non-commercial operators, including restaurants, chef networks, universities and culinary institutions, handle, menu and promote Wild Alaska Seafood products.



CAPTAIN D'S
SEAFOOD KITCHEN

WILD ALASKAN SALMON DINNER

WILD CAUGHT

Health Benefits of Omega 3 Fatty Acids

ALASKA SEAFOOD
Wild, Natural & Sustainable

Learn More About Alaskan Seafood

Our Salmon filet comes with your choice of Ginger Teriyaki, Sweet Chili or Scampi Butter Sauce over a bed of rice along with one of our scrumptious breadsticks and your choice of any two sides. Try it with broccoli, side salad, baked potato, corn on the cob or any of over 10 delicious home-style sides.

Limited Time Only Wild Alaskan Salmon Dinner
\$5.25

W2Q7E Participating locations only. Limit one per coupon. Not valid with any other offers. Prices vary based on choice of side. Expires 8/29/2010.

4-PC Fish Dinners
\$4.95

W2Q7E Participating locations only. Limit one per coupon. Not valid with any other offers. Prices vary based on choice of side. Expires 8/29/2010.

Take home a Gallon of Tea
\$2.50

W4Q7E Participating locations only. Limit one per coupon. Not valid with any other offers. Expires 8/29/2010.

Click Here for your Printer Friendly



Indulge In Something Wild.
Wild Alaska Seafood...The Catch Is In.

MCCORMICK & SCHMICKS
SEAFOOD RESTAURANTS

Celebrate Father's Day Weekend, June 18-20
Reservations: www.McCormickandSchmicks.com

Captain D's

Top: Yale University – Iron Chef
Bottom: McCormick & Schmick's





A division based promotion ...

Wild for Lent

Order now for great savings!

A-Code	P-Code	Brand	Description	Pack Size	
5667787	362922	Harbor Banks-D	Cod, Pacific 8-16 Oz Fillet Boneless-Skinless Chem Free	3/15 Lb	\$2.25 / Cs
8357634	541853	Bluewater-T	Flounder, Breaded 4 Oz Fillet Boneless-Skinless	40/4 Oz	\$1.00 / G
624549	156549	Bluewater-T	Flounder, Breaded 5 Oz Fillet Boneless-Skinless	10 Lb	\$1.00 / G
5779913	400197	Harbor Banks	Halibut Loin Steaks 10 Oz.	10 Lb	\$1.50 / G
5779948	400190	Harbor Banks	Halibut Loin Steaks 6 Oz.	10 Lb	\$1.50 / G
5779987	400195	Harbor Banks	Halibut Loin Steaks 8 Oz.	10 Lb	\$1.50 / G
5779384	400138	Harbor Banks	Halibut Regular Steaks 10 Oz.	10 Lb	\$1.50 / G
5779343	400134	Harbor Banks	Halibut Regular Steaks 6 Oz.	10 Lb	\$1.50 / G
5779350	400135	Harbor Banks	Halibut Regular Steaks 8 Oz.	10 Lb	\$1.50 / G
5779517	400151	Harbor Banks	Halibut S/L Fillet Portion 10 Oz.	10 Lb	\$1.50 / G
5779442	400144	Harbor Banks	Halibut S/L Fillet Portion 4 Oz.	10 Lb	\$1.50 / G
5779475	400147	Harbor Banks	Halibut S/L Fillet Portion 6 Oz.	10 Lb	\$1.50 / G
5779491	400149	Harbor Banks	Halibut S/L Fillet Portion 8 Oz.	10 Lb	\$1.50 / G
4717096	278463	Harbor Banks-D	Pollock, 3 Oz Fillet Boneless-Skinless Chem Free	10 Lb	\$1.00 / G
4722832	279118	Harbor Banks-D	Pollock, 4 Oz Fillet Boneless-Skinless Chem Free	10 Lb	\$1.00 / G
4722815	279112	Harbor Banks-D	Pollock, 4 Oz Loin Boneless-Skinless Chem Free	10 Lb	\$1.00 / G
4717211	278475	Harbor Banks-D	Pollock, 5 Oz Fillet Boneless-Skinless Chem Free	10 Lb	\$1.00 / G
4982744	346463	Harbor Banks	Salmon, Keta 4 Oz Fillet Boneless-Skin-On	10 Lb	\$1.00 / G
4982004	346423	Harbor Banks	Salmon, Keta 6 Oz Fillet Boneless-Skinless	10 Lb	\$1.00 / G
4982727	346467	Harbor Banks	Salmon, Keta 6 Oz Fillet Boneless-Skin-On	10 Lb	\$1.00 / G
4982702	346424	Harbor Banks	Salmon, Keta 6 Oz Fillet Boneless-Skinless	10 Lb	\$1.00 / G
4982737	346472	Harbor Banks	Salmon, Keta 8 Oz Fillet Boneless-Skin-On	10 Lb	\$1.00 / G
4982020	346425	Harbor Banks	Salmon, Keta 8 Oz Fillet Boneless-Skinless	10 Lb	\$1.00 / G
51599	17487	Bluewater	Salmon, Smoked Gold Nova Lox 1.5 Lb Side Skinless	27/5 Lb	\$0.50 / F
5821869	409623	Harbor Banks	Salmon, Wild Keta S/O Fillet 10 Oz.	10 Lb	\$1.00 / G
5821810	409618	Harbor Banks	Salmon, Wild Keta S/O Fillet 4 Oz.	10 Lb	\$1.00 / G
5821828	409619	Harbor Banks	Salmon, Wild Keta S/O Fillet 6 Oz.	10 Lb	\$1.00 / G
5821836	409620	Harbor Banks	Salmon, Wild Keta S/O Fillet 8 Oz.	10 Lb	\$1.00 / G
5821711	409608	Harbor Banks	Salmon, Wild Keta S/O P/O Fillet 4 Oz.	10 Lb	\$1.00 / G
5821752	409612	Harbor Banks	Salmon, Wild Keta S/O P/O Fillet 6 Oz.	10 Lb	\$1.00 / G
5821778	409614	Harbor Banks	Salmon, Wild Keta S/O P/O Fillet 8 Oz.	10 Lb	\$1.00 / G
8166296	533395	Bluewater-T	Surimi, Imitation Crabmeat Chunk & Flake Cooked Frozen	47.5 Lb	\$0.50 / F
7369846	533404	Bluewater-T	Surimi, Imitation Crabmeat Chunk & Flake Cooked Frozen	47.5 Lb	\$1.00 / F
6356298	533394	Bluewater	Surimi, Imitation Crabmeat Chunk & Flake Cooked Fm W/ Snow Crab	47.5 Lb	\$1.00 / F

What a better way to kick off Lent than with Alaskan wild caught seafood!

U.S. Foodservice® is proud to provide an Alaska Seafood Marketing Institute (ASMI) focused Lent promotion.

Products Received Dates: March 1 - April 30, 2011

For more info on ASMI, check out the back!

ALASKA SEAFOOD: A MODEL OF SUSTAINABILITY



Alaska Seafood Marketing Institute Consumer Trends Report 2011

New research from the Alaska Seafood Marketing Institute reveals the market for Alaska seafood is growing, with consumers seeking wild caught, sustainable, and responsibly sourced seafood.

No two research companies in history of 21st-century seafood have 100% to provide consumers with information and insight to make their choices.

The study shows that 100% of consumers buy seafood weekly or more often, and 90% of consumers buy seafood weekly or more often.

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CONSUMER ATTITUDES TOWARDS SEAFOOD

When asked to describe their perception of Alaska seafood, consumers chose "Wild" and "Sustainable" as the top two terms.

Consumers also agreed that Alaska seafood is a great source for omega-3 fatty acids.

Alaska seafood is a powerful differentiator in the seafood market, and consumers are willing to pay more for it.

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\$4 Rebate ON ALL ALASKAN SEAFOOD ITEMS UP TO \$200

See Reverse for Details

Why Alaska Seafood?

Wild
Wild-caught Alaska salmon, whitefish varieties and shellfish mature at a natural pace, and swim freely in the pristine waters off Alaska's rugged 34,000-mile coastline.

Superior Flavor
The superior flavor and texture of Alaska Seafood is prized around the world. The color, characteristics and flavor come from the seafood species feeding on their natural diet of marine organisms, and the texture comes from annual migrations in the cold North Pacific.

Versatile
It's easy to prepare Alaska Seafood using your favorite cooking method. Whether you like to grill, poach, bake, or sauté, you can have a delicious meal to your guests in minutes.

Healthy
If you are looking for a meal that is nutritious, low in saturated fat, and high in the "good fats" - heart-healthy omega-3s, you can start with Alaska Seafood.



For more information about Harbor Banks® and Bluewater® products, visit mar.ch.usfoodservice.com.

For internal use only: 02-2011



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For internal use only: 02-2011



Wild, Natural & Sustainable®



**UMass – Longest
Sushi Roll**
300 volunteers
330 feet of sushi!



International Marketing

Program focuses on promotional efforts in key international markets: Japan, the European Union and China. The main activities include retail and foodservice promotions, technical seminars, chef and retail Alaska Seafood training, trade missions, advertising and public relations.





ABORDO®
ESPECIALISTAS EN ALIMENTOS CONGELADOS

División Hostelería

Producido y envasado
para la Hostelería más exigente

100% Calidad
durante los 365 días al año.

OFERTAS VALIDAS DEL 1 AL 31 DE AGOSTO DE 2004

DELHAIZE

Wilde gerookte
rode zalm uit Alaska
Saumon rouge
sauvage fumé d'Alaska
Wilder geräucherter
Rotlachs aus Alaska

Drooggezouten, gerookt op houtvuur
Salé à sec, fumé au feu de bois
Troocken gesalzen, geräucher auf Holzfeuer

MSC
Omega 3
79g
97kcal
25% 20%
Nettogewicht
Poids net
150g e

$\frac{4}{6}$

durante los 365 días al año
100% Calidad

OFERTAS VALIDAS DEL 1 AL 31 DE AGOSTO DE 2004

MSC
Omega 3
79g
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Poids net
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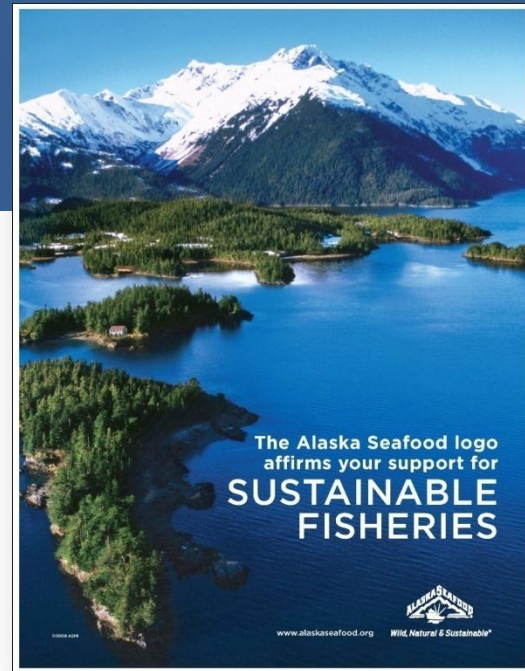
Global Food Aid

The Alaska Canned Salmon Global Food Aid program was created in 2005 by the Alaska salmon fishing industry to foster the use of flavorful, nutritious and easy-to-prepare canned salmon in world food aid programs.



Seafood Technical

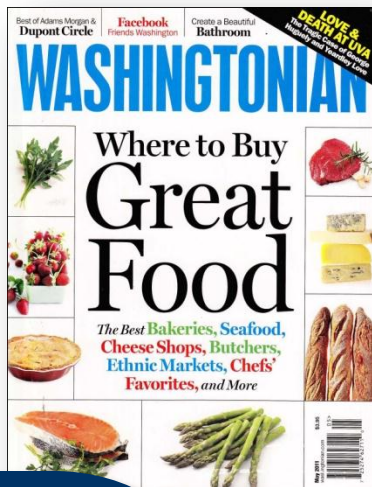
The program works in collaboration with the Alaska seafood industry and the ASMI marketing staff to offer information on food safety, quality, nutrition, food labeling, environmental issues, fisheries sustainability and seafood purity.



Wild, Natural & Sustainable®

Communications

The communications program supports the marketing staff through media relations, press interviews, participation in seafood industry trade shows, and the preparation of reports and press releases.



COASTAL LIVING'S 14TH ANNUAL LIST!

America's Favorite

SEAFOOD DIVES

It's our annual guide to the top eateries where food is fried, broiled, grilled, or otherwise slapped on butcher paper for your finger-licking, crab-cracking, French fry-munching pleasure. This year, our winners (and finalists) were chosen by our readers!

Alabama
LuLu's at Homeport Marina Gulf Shores
You'll love the all-ages appeal of this sandy, tropical paradise operated by Lucy Buffett, singer Jimmy's sister. The Southern-style menu includes fried green tomatoes and a variety of seafood dishes, and musicians entertain every day. 251/967-5858 or lulusathomeport.com

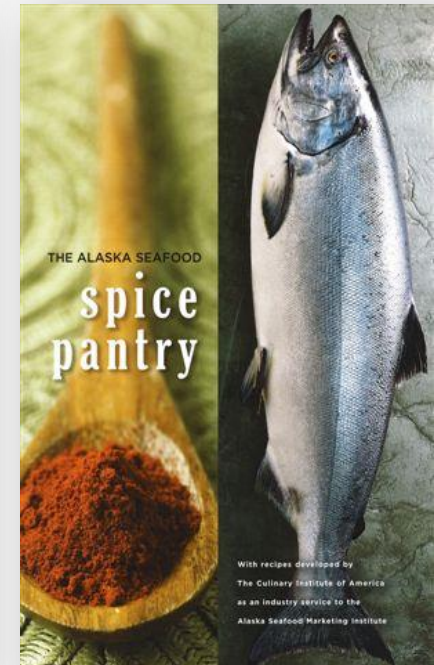
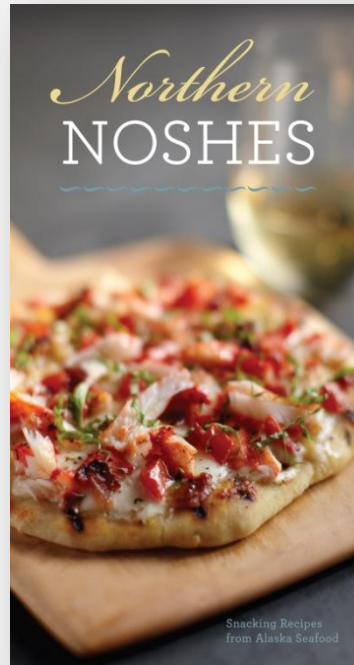
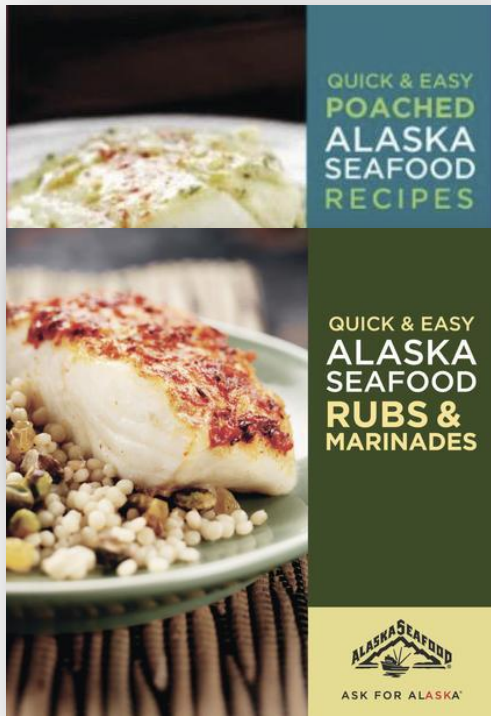
Tasty Contenders
• Doc's Seafood Shack & Oyster Bar, Orange Beach
This is where the locals go. Readers adore the fresh oysters and make-your-own cocktail sauce. 251/981-6999.

ALASKA
251/973-1572.
Sandbar and Grill
Juneau
chips, plate, 907/766-2800 or bambapioneer.net.

Tasty Contenders
• The Hangar on the Wharf Pub & Grill, Juneau
is topped with the fish-and-chips plate, 907/789-8400. claws are full of newbies, 949/673-0100 or thecrabcooler.com.

WRITER STEVE MILLBURG ILLUSTRATOR MATT CASERTA

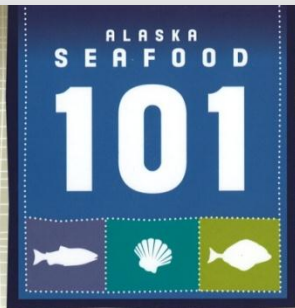




ASMI Material: Recipe Cards & Cookbooks



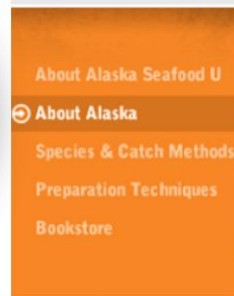
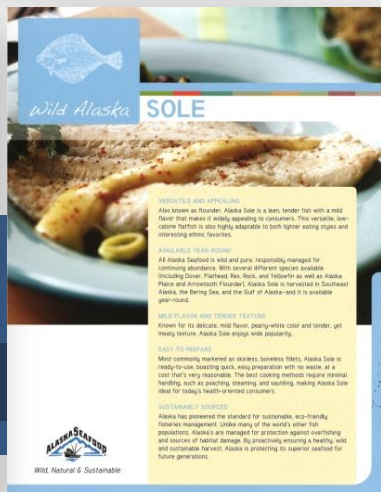
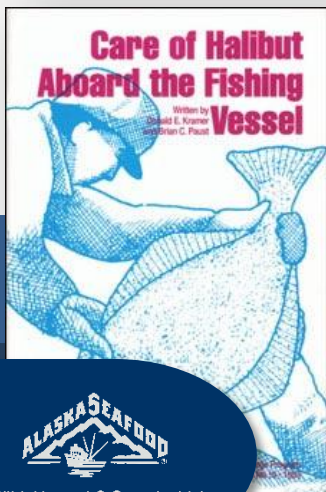
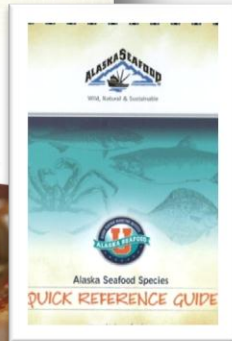
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A comprehensive species guide and glossary for sourcing Alaska seafood.



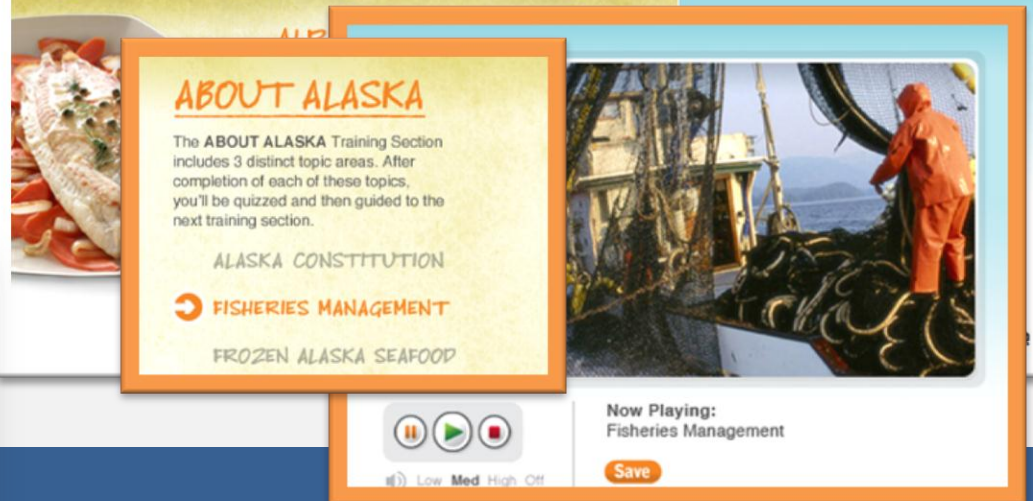
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WELCOME TO ALASKA SEAFOOD U

Get Certified in 3 Easy Steps!

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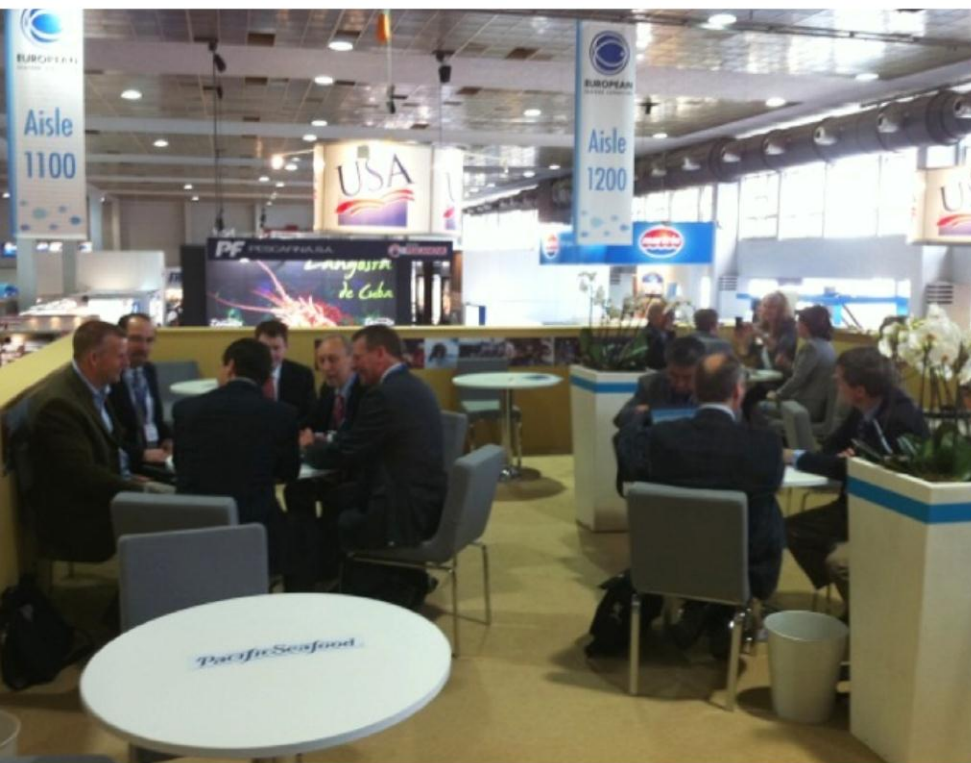
ASMI Training Material



International Boston Seafood Show 2010



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European Seafood Exposition 2011

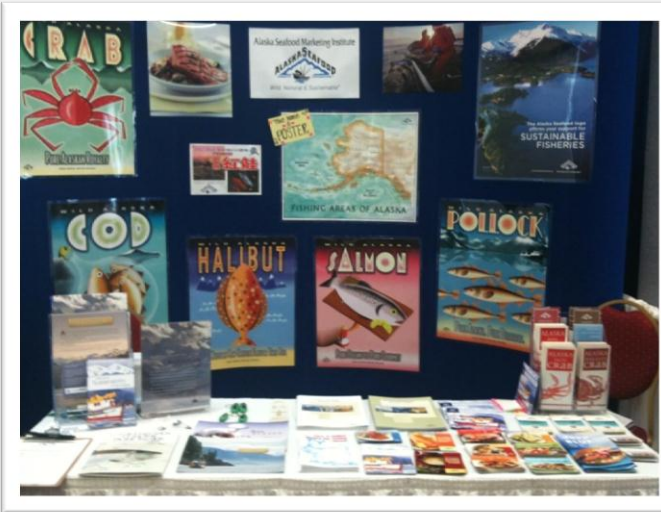
***May 3-5, 2011
Brussels, Belgium***

***\$50,156,000 in onsite sales
\$634,800,000 in 12 month projected sales***

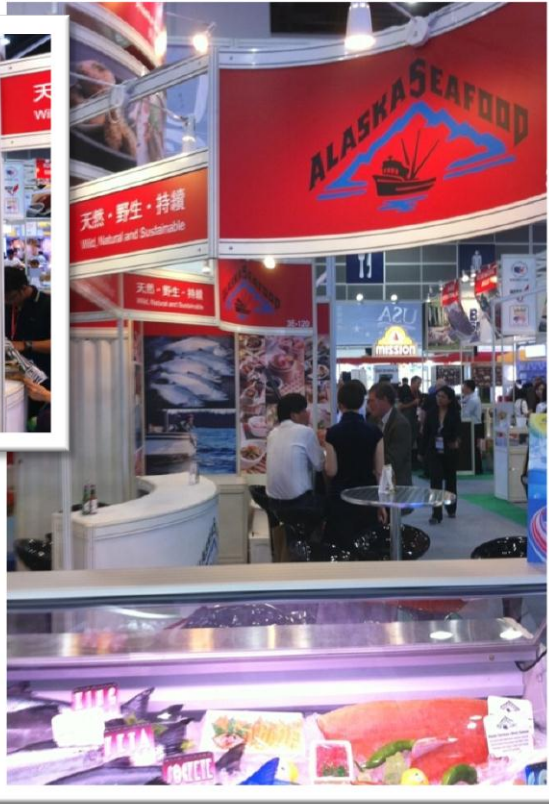
This is a gain of roughly \$1 million more in onsite sales over 2010 and about a \$130 million gain in 12 month projected sales over 2010.



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HOFEX, Hong Kong, China



Rewe, Hamburg, Germany



POLFISH, Gdansk, Poland



International & Domestic Events



Recent Challenges



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*Significant international and domestic attacks on Alaska
have ensued after major Alaska salmon processors
withdrew from the MSC certification process in
January, 2012.*



*Wild, Natural & Sustainable**



“Alaskans are going to regret the path they are trying to go down”

“I think we’re in a transition period where we are going to see the demise of hatcheries...”

“...we wrote into that statute that any fishery that wants to bear a California sustainable seafood label has to get certified by the MSC first.”

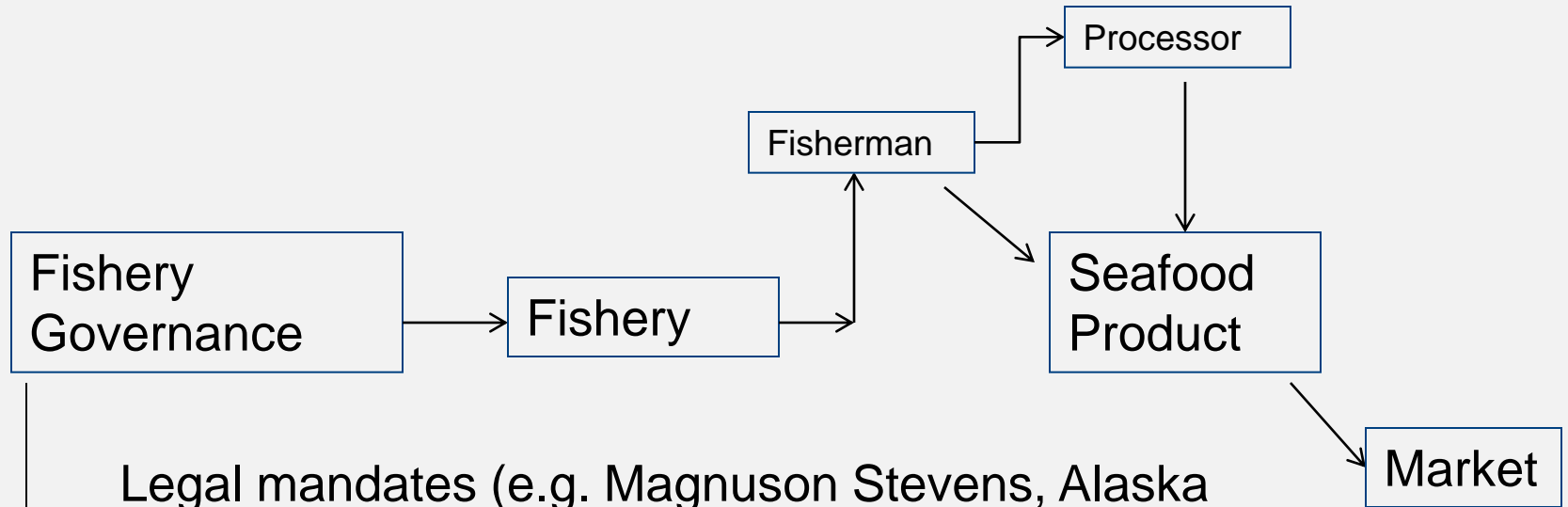
Mike Sutton
Monterey Bay Aquarium
MSC Founder
As quoted in *Intrafish*

Why withdraw? Concerns over:

- Maintaining market access*
- Potential NGO control of the fishery management process*
- Long-term devaluation of the Alaska Seafood brand*
- Ongoing and increasing costs of the MSC certification and pay-to-play eco-labeling*



What should be the role of the NGO?



— Legal mandates (e.g. Magnuson Stevens, Alaska constitution, CFP, Australian National Legislation)

— FAO Guidance

— Competent Authority

— Stakeholders; Fishermen, Processors, Coastal Communities

— NGOs

Bottom Line

- *Who should manage the Alaska salmon fishery?*
- *Regardless of what we think of the MSC, and without necessarily criticising the MSC, the fishing industry simply cannot, as a matter of principle and form, tolerate a situation where a single private entity, on the basis of a changeable private standard, has sole authority to decide who can sell seafood to the public and who cannot.*
- *Common sense tells us that choice drives opportunity. It is about fisheries and their supply chain partners and their right to decide how to demonstrate best practice. This cannot happen without the availability of credible options.*



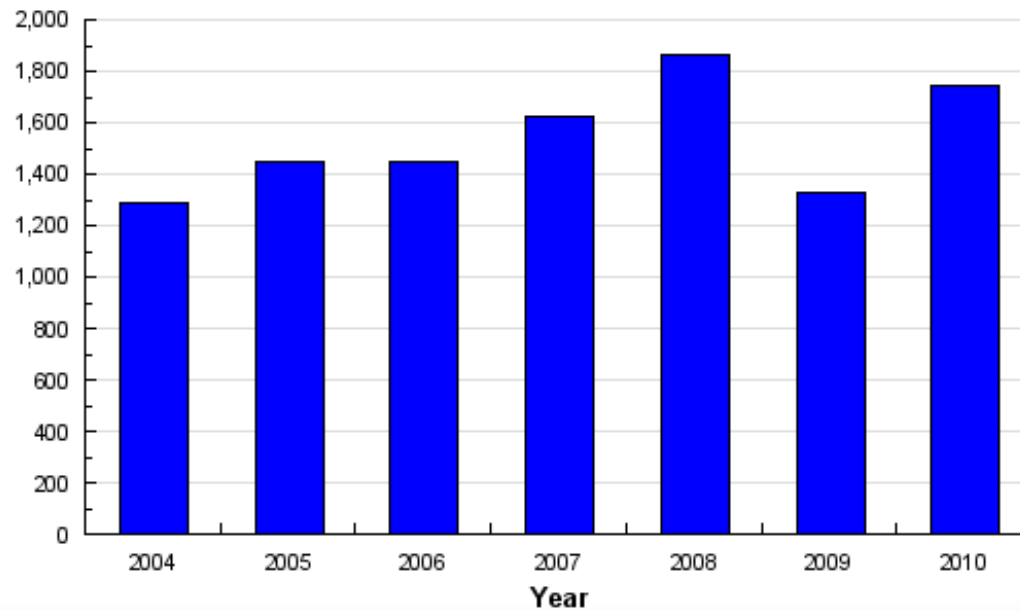
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Performance Details

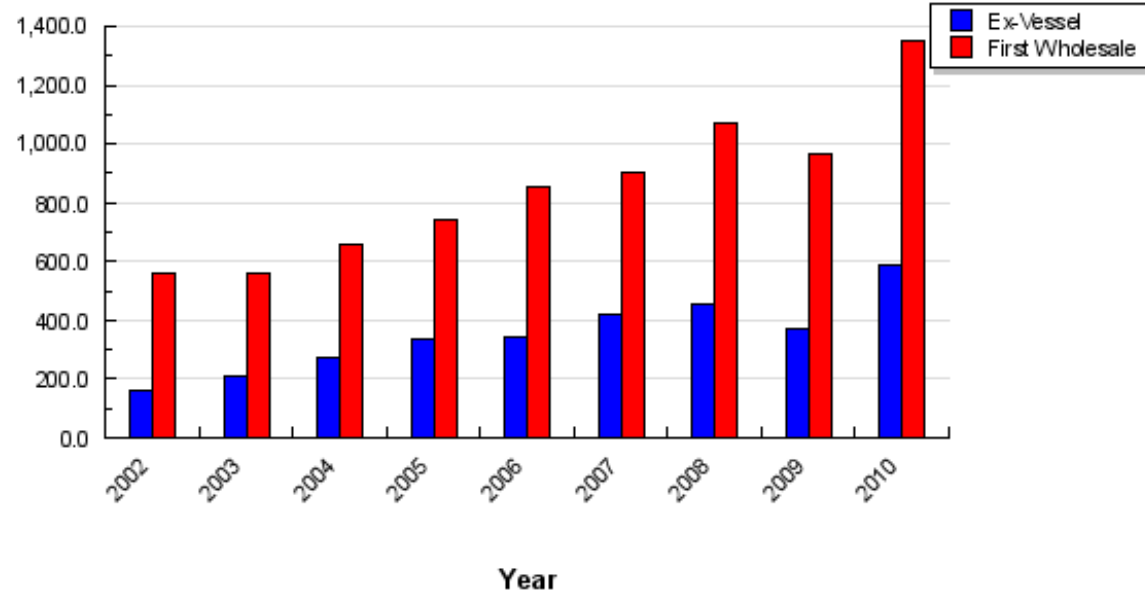


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Alaska Ex-vessel Value (millions of dollars), Key Commercial Species

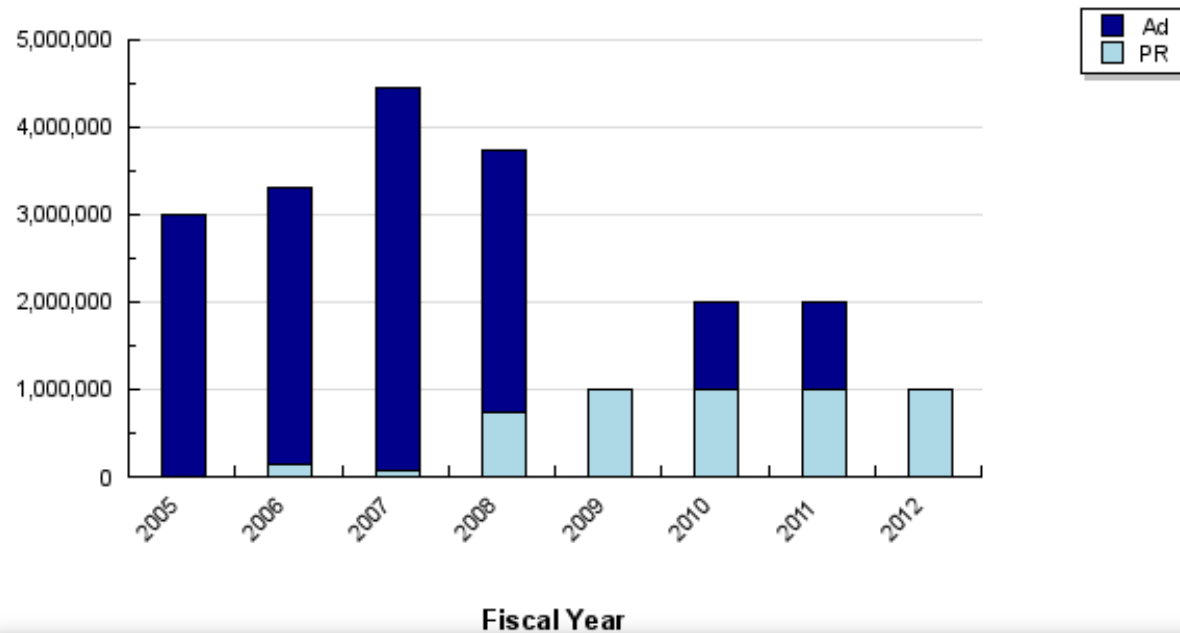


Alaska Salmon Value Growth: Ex-Vessel and First Wholesale (millions of dollars)

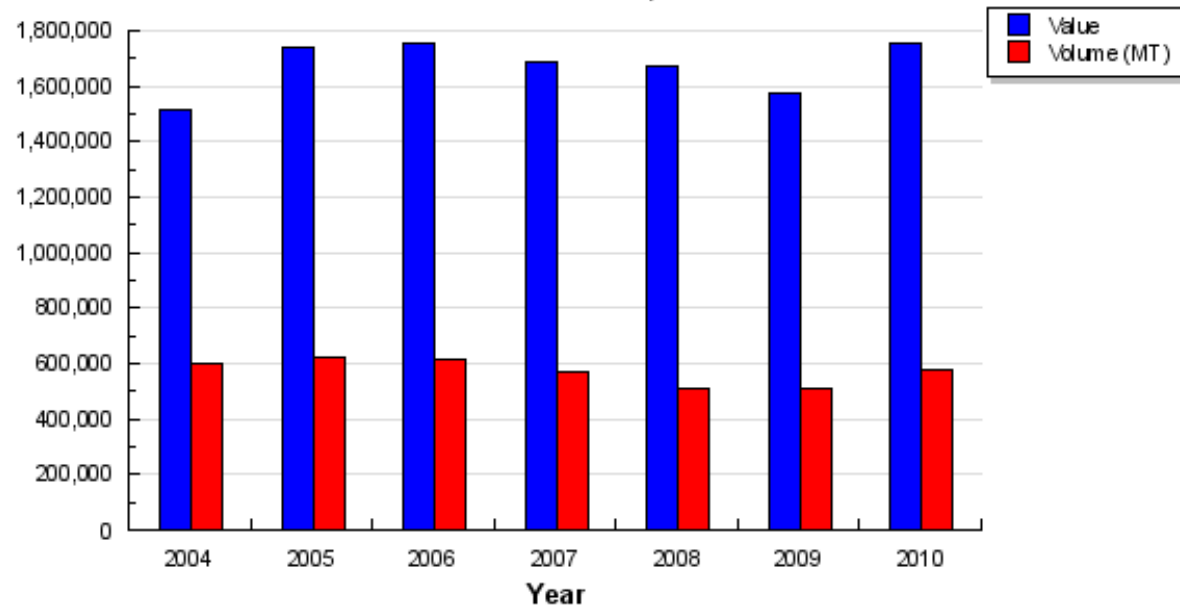


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U.S. Consumer Advertising and Public Relations Campaign



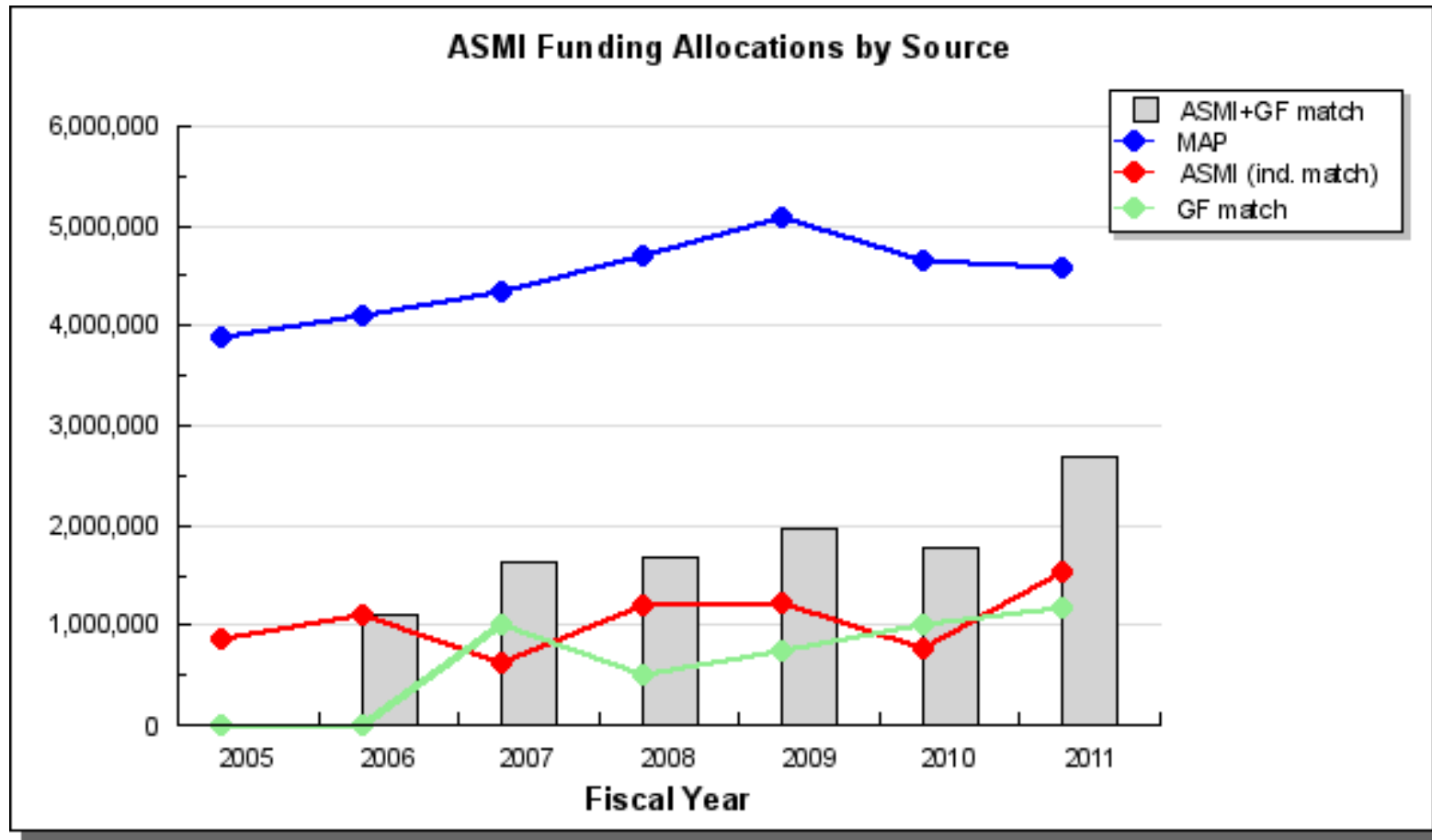
Alaska Seafood Exports to ASMI Program Destinations (millions of dollars)



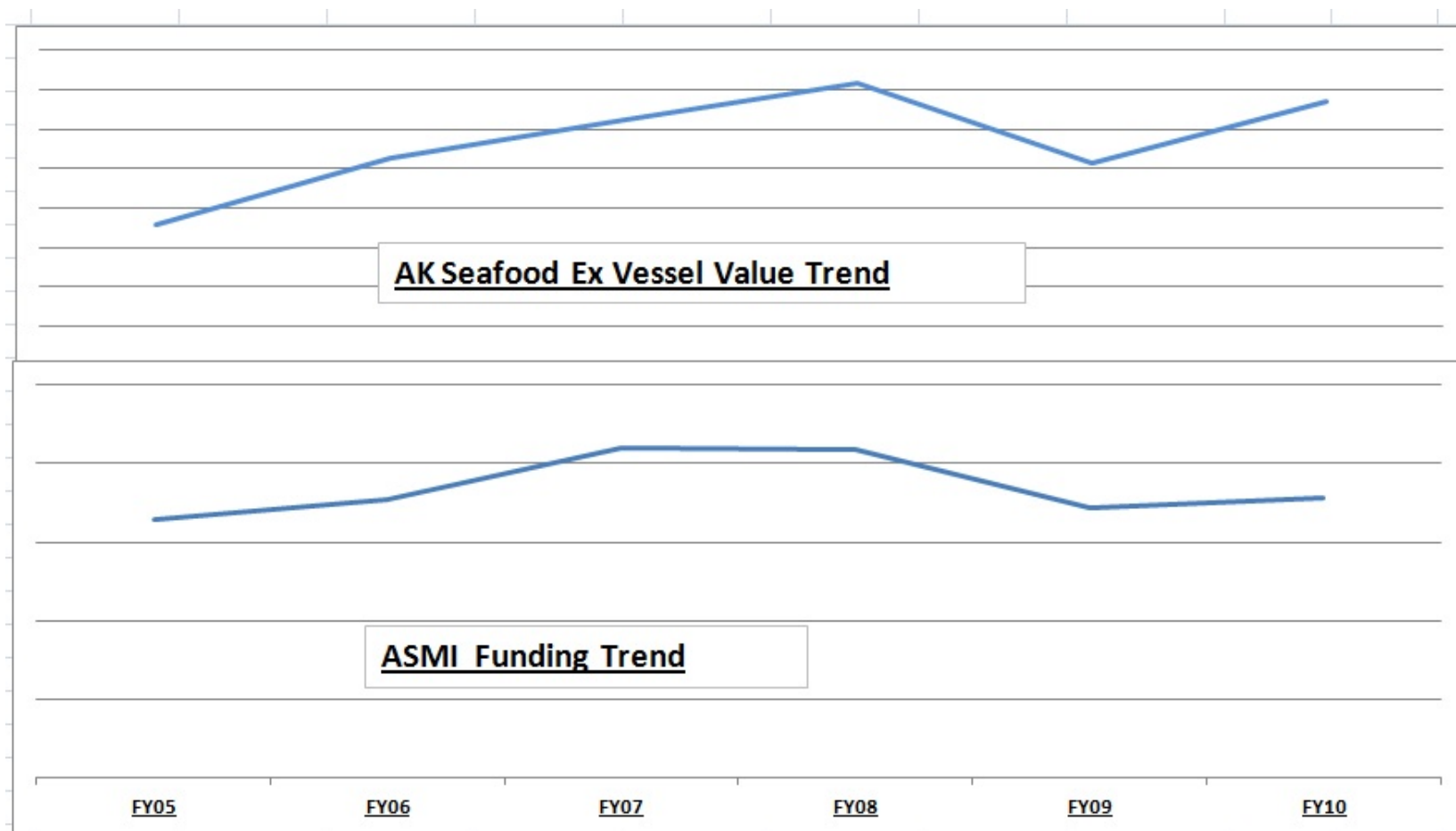
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Alaska Seafood Marketing Institute Funding

Federal Market Access Program(MAP) • Seafood Assessment Tax (.5%) • State General Funds



Ex Vessel vs ASMI Funding



*Alaska Seafood Marketing Institute
Component Detail*

	FY2012 Management Plan	FY2013 Governor	FY12 Management Plan vs FY13
Fed Rcpts (MAP)	5,000.0	4,500.0	-500.0
Gen Fund	7,770.1	7,770.1	0.0
GF/Prgm (Industry)	7,054.0	7,612.2	558.2

Alaska Seafood Marketing Institute FY13 Governor's Operating Budget

	FY12 Management Plan	FY13 Governor	FY12 to FY13
Personal Services	2272	2405.2	133.2
Travel	390.3	390.3	0
Services	16973.3	16898.3	-75
Commodities	180	180	0
Capital Outlay	8.5	8.5	0
Grants			
Total	19824.1	19882.3	58.2

Changes: FY12 to FY13 budget details:

Salary Adjustment

Increased Industry Receipts

Increased General Fund



Thank You!



Wild, Natural & Sustainable®

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