

**02/10/15**

**Overview:**

**Alaska**

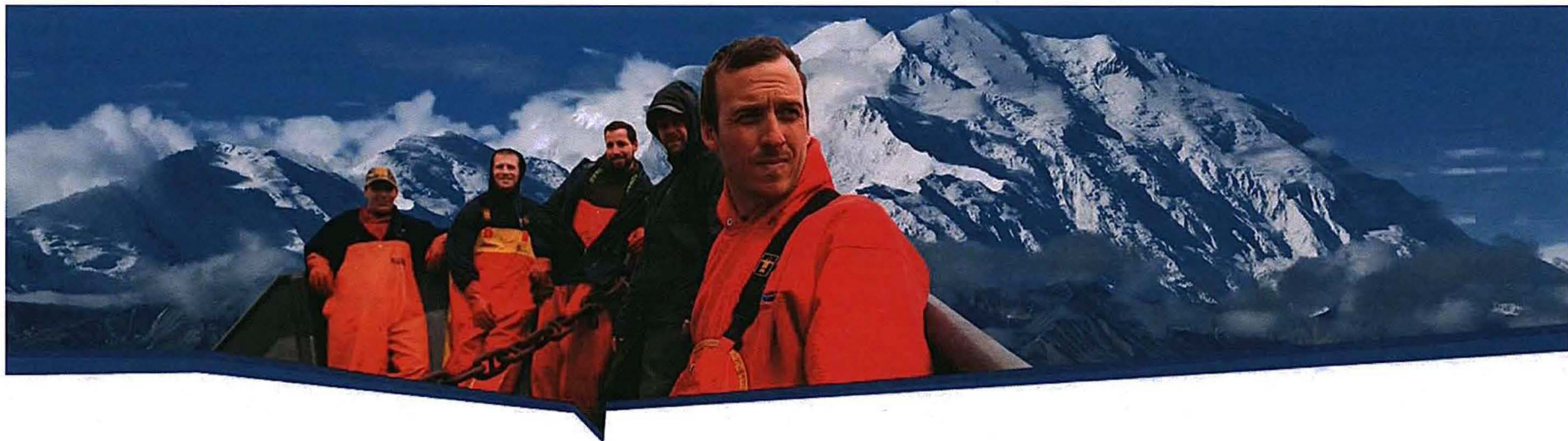
**Seafood**

**Marketing**

**Institute**

**(ASMI)**

<TARGET><BILL></BILL><SUBJECT>02-10-15 Overview Alaska  
Seafood Marketing Institute  
(ASMI)</SUBJECT><COMM>HFSH29</COMM></TARGET>



# Alaska Seafood Marketing Institute

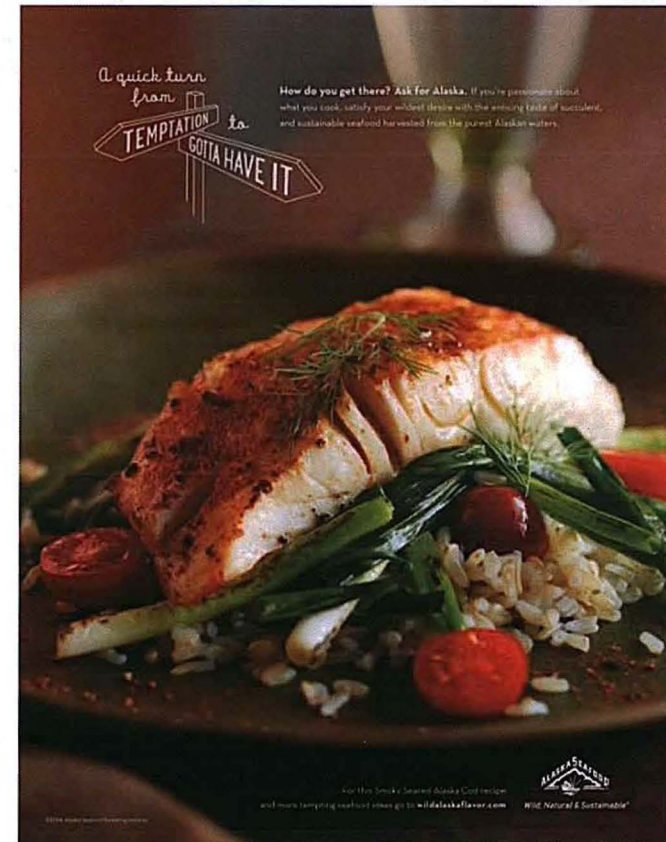
Michael Cerne  
ASMI Executive Director  
House Fisheries Committee  
February 10, 2015



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# The Alaska Seafood Marketing Institute is

- A public private partnership between the State of Alaska and the Alaska Seafood Industry
- 7 member Board and 20 full time staff in Alaska and Seattle
- The official seafood marketing arm of the State of Alaska
- **Mission: To Increase the value of Alaska seafood in the US and worldwide**

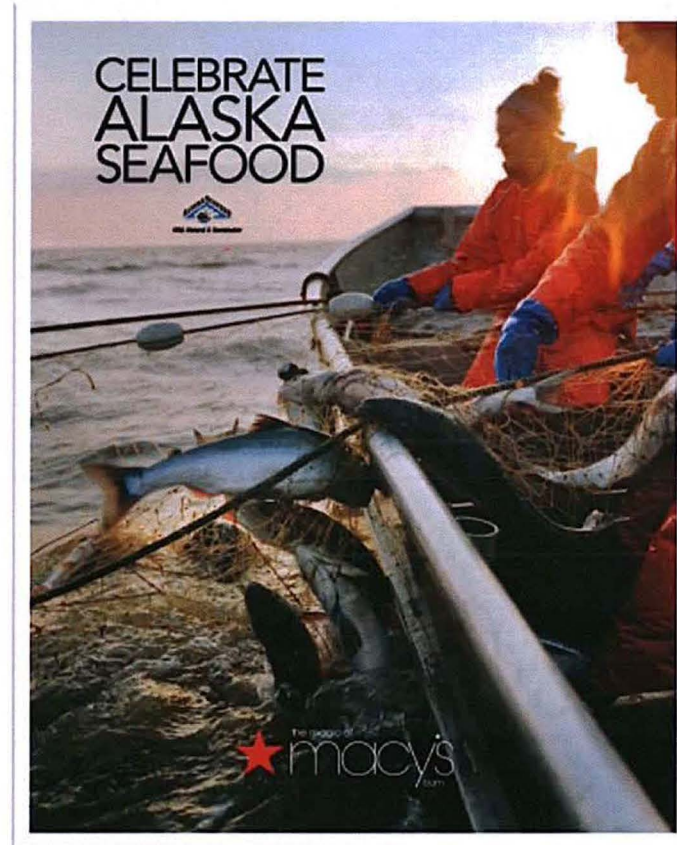


# ASMI Funding

Alaska Seafood Marketing Institute (ASMI) FY 2016 Budget	(000)
Unrestricted General Funds	\$ 1,820.6
General Fund Match	\$ 4,500
Federal Funds (Market Access Program)	\$ 4,500
<u>Voluntary Industry Tax and Carryforward</u>	<u>\$13,324.6</u>
Total Authorization	\$24,145.2
FY 2015 Marketing Spend Plan	\$24,000

# ASMI Programs and Committees

- **MARKETING**
  - U.S. FOOD SERVICE
  - U.S. RETAIL
  - INTERNATIONAL
  
- **OTHER**
  - COMMUNICATIONS
  - TECHNICAL
  - FOOD AID
  - FISCAL/ADMIN
  
- **COMMITTEES – SPECIES, MARKETING, TECHNICAL, CUSTOMER**

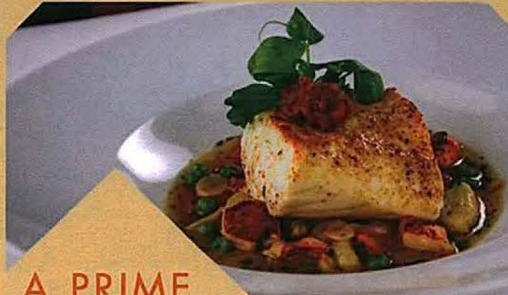


# US Foodservice Program

## 2014 Highlights

- Promotions with 28 national/regional restaurant chains (+11,000 units)
- 14 foodservice distributors, including nat'l/metropolitan K-12
- Events at six different universities
- Attended dozen conferences/events, educate chefs/buyers (Culinary Institute of America, National Restaurant Assoc, International Assoc. of Chefs, Disney)
- Research: Fish sandwich/taco, used for future promotions

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— PHILADELPHIA —  
SEAFOOD • STEAKS • COCKTAILS



**A PRIME PAIRING**  
AT A PLEASING PRICE

DISCOVER BODEGA DON OLEGARIO ALBARINO  
JUST \$12 A GLASS WITH OUR ALASKAN HALIBUT

Our Beverage Director Ryan Valentine highly recommends pairing this light, crisp and refreshing Spanish wine with Chef Sonny Pache's Alaskan Halibut with Lobster, Gnocchi, Spring Peas and Lemon Jus.

If you like Sauvignon Blanc, you'll love this seafood-friendly Albarino from *Bodega Don Olegario*, a family owned artisanal winery.

Enjoy this prime pairing available for a limited time.

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124 South 15th Street | Visit Ocean-Prime.com

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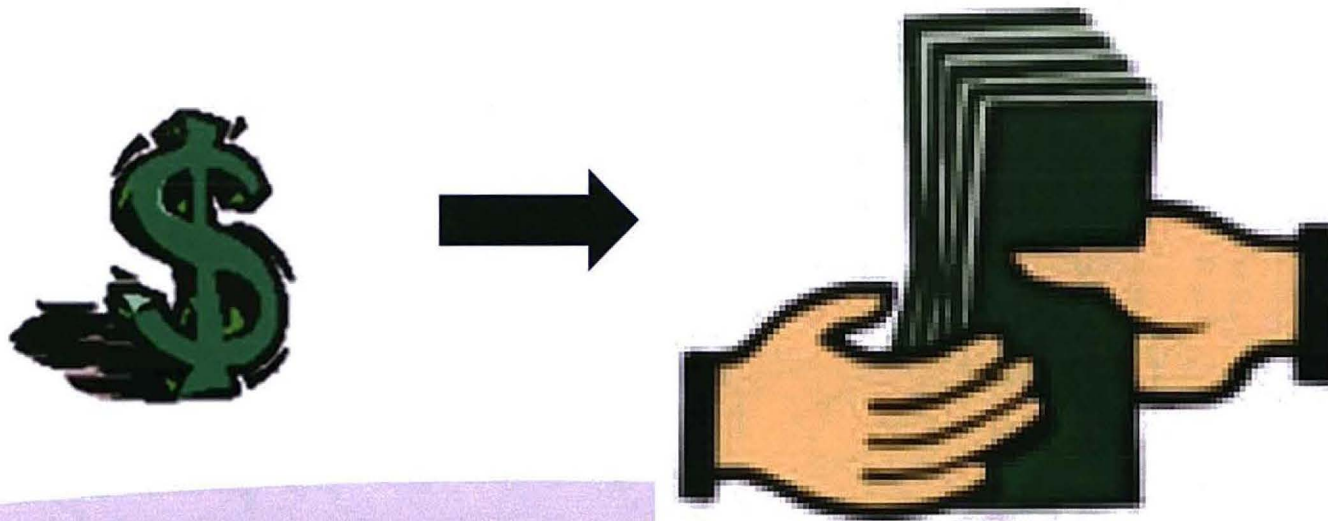
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EXPERIENCE THE MODERN AMERICAN SUPPER CLUB.

# Foodservice Operator Match Spend

**Restaurant Chain R.O.I = 10:1**

For every **\$1 dollar** ASMI puts towards a restaurant chain partnership, a chain will spend approximately **\$10 dollars** promoting Alaska seafood and the ASMI brand logo.



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# US Foodservice Program

- Alaska Seafood brand ranks #2 on U.S. restaurant menus!




How to Sauté  
Chef Christine Keff, Flying Fish,  
Seattle



How to Poach  
Chef Jason Wilson, CRUSH, Seattle

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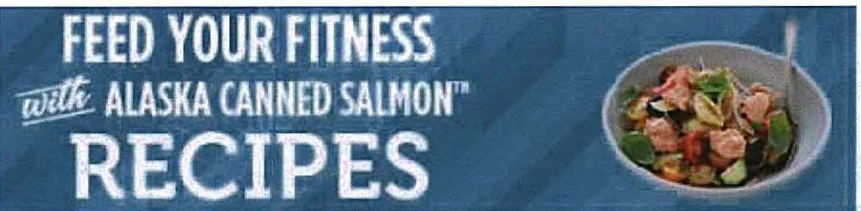


THE PROFESSIONAL CHEF DISCOVERS  
SUSTAINABLE  
**alaska seafood**



# US Retail Program

- Promotions in 80 chains +25,000 stores
- Point-of-sale materials for retailers (+1.5M POS items)
- Pink salmon campaign - \$1.5M
- Research for future promotions – Best in Class Retailers
- The Multi Ad website allows retailers to design their own ads
- 112M impressions (print/online/events)
- **New consumer website:**  
[www.wildalaskaseafood.com](http://www.wildalaskaseafood.com)



www.wildalaskaseafood.com



RECIPES

COOK IT FROZEN!®

PURELY ALASKA

NUTRITION

COMMERCIAL KITCHEN

RECIPE BOX

MEDIA PANTRY



# NATURALLY HEALTHY

ALASKA SEAFOOD ISN'T JUST DELICIOUS, IT'S GOOD FOR YOU, TOO

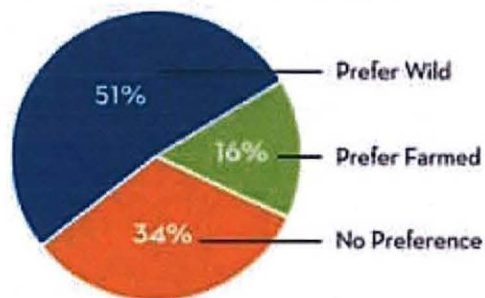
▶ READ MORE



# The Results are Impressive: US program



CONSUMERS PREFER  
WILD FISH/SEAFOOD TO FARMED  
BY A 3-TO-1 MARGIN



If given the choice, would you prefer to eat  
wild fish/seafood or farm-raised fish/seafood?

CONSUMERS ARE MORE LIKELY  
TO RECOMMEND ALASKA SEAFOOD  
THAN ANY OTHER PROTEIN TESTED

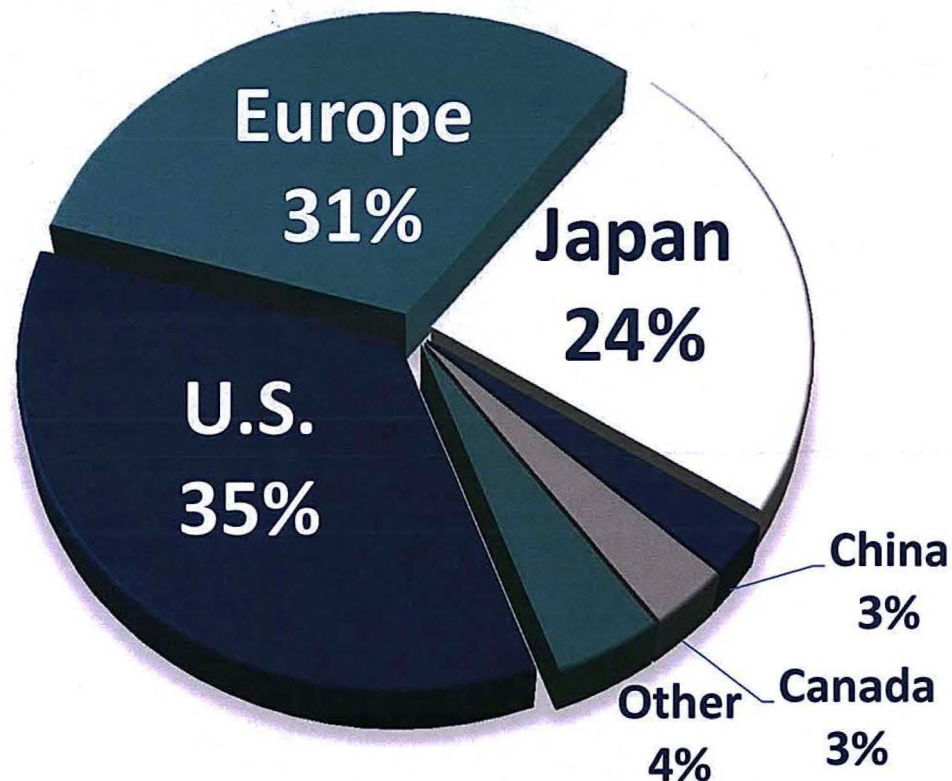
Alaska seafood	45%
Alaska salmon	43%
USDA Prime sirloin	38%
Angus beef	37%
New England seafood	33%
USDA Organic chicken	32%
Atlantic salmon	31%
Louisiana/gulf seafood	28%
Kobe beef	26%
Farm-to-table pork	24%
Farmed seafood	20%
Asian seafood	18%

How likely are you to recommend the following to  
a friend, family member or colleague?



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# Estimated Market Share by Value - 2013



*Note: These figures are rough estimates of final sales made by country based on preliminary wholesale value, trade data, and industry interviews. There is no conclusive data source for summarizing market share by country.*

*Source: McDowell Group estimates based on NMFS trade data.*



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# ASMI International Program

- The ASMI International Program operates off a grant from the USDA and a State of Alaska match for a combined budget of roughly \$9 million.
- Active in 21 Countries with 8 Regional Programs:

- **Japan**
- **China**
- **Western Europe** (France, Belgium)
- **Central Europe** (Germany, Austria, Switzerland, Poland, Czech Republic)
- **Southern Europe** (Spain, Italy, Portugal)
- **Northern Europe** (U.K., Ireland, Finland, Denmark, Sweden, the Netherlands)
- **Eastern Europe** (Russia, Ukraine)
- **Brazil**



天然のおいしさを、アラスカから。



野生・天然・持続



*Sauvage, Naturel & Durable*



*Selvagem, Natural & Sustentável*



*Salvaje, Natural & Sostenible*



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# International Marketing Program

- **Alaska is the world's 6<sup>th</sup> largest seafood exporter**

## **Program Highlights:**

- Participated in 25 trade shows targeting seafood industry, distributors, hotel/restaurant buyers, chefs, and major retailers
- **\$544 million in projected sales** from the Global Seafood Expo
- Retail Promotions:
  - Major International and local retailers
  - Shift to online retail – Japan, UK, China
- Press/Trade inbound trips to Alaska (Brazil, Germany, EU, Japan)
- Consumer events, advertising and promotions online and offline
- Hotel/Restaurant/Institution (HRI) promotions and chef training

# In-store promotion, Brazil



Sial, China



# The Results are Impressive: China Program



的消费者认为阿拉斯加海产比其他竞争产品的质量更高  
of all consumers say Alaska seafood is better quality than the competition



的消费者在去年购买过阿拉斯加海产  
of all consumers report purchasing Alaska Seafood in the past year.



的消费者反映, 如果知道阿拉斯加海产是“野生, 天然, 持续”的产品, 他们会愿意购买  
of consumers stated they would buy Alaska seafood if they knew it was "Wild, Natural and Sustainable."



的消费者认为阿拉斯加原产地对他们的购买决定是“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



# New Market Exploration: SE Asia

- ❑ The ASMI international program continues to seek new markets for underutilized species and product forms. Guided by the International Marketing Committee ASMI International attends trade shows in non-program markets to explore potential.
- ❑ The Alaska seafood industry is expanding interest in S.E. Asia. ASMI attended Food and Hotel Asia, Singapore and Food and Drinks Asia in Manila, Philippines in 2014. ASMI collected trade leads for the industry.



Food and Drinks Asia,  
Manila 2014



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# Communications Program

- Oversees PR contract
- Social media, press tours/events, media requests, outreach, image library, provides informational services
- Result: \$59M in earned media
- In-state and industry outreach
- Government affairs



## FISHING FAMILIES PHOTO CONTEST

[PHOTOCONTEST.ALASKASEAFOOD.ORG](http://PHOTOCONTEST.ALASKASEAFOOD.ORG)



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# New for 2015...



## NEW! PRINCESS BRINGS MORE OF ALASKA ON BOARD



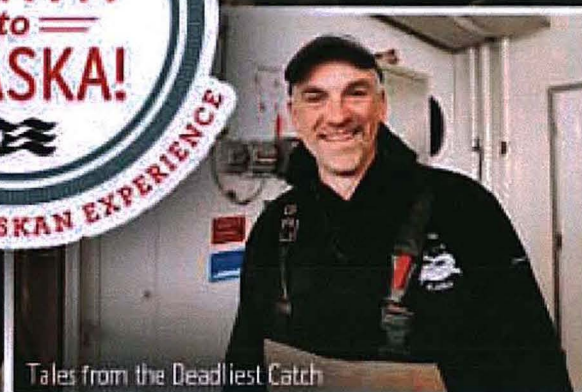
Fresh Alaska Seafood



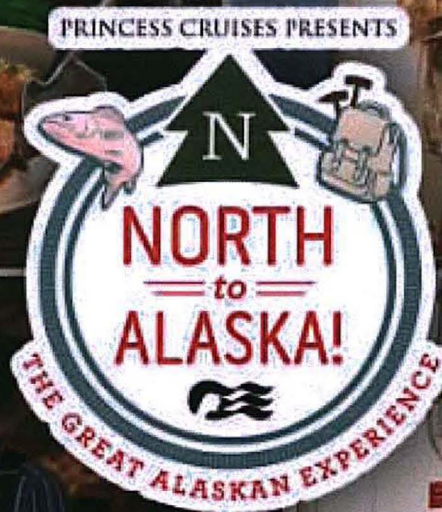
'Logger Heads'  
Living like a Lumberjack



Klondike Gold Rush Festival



Tales from the Deadliest Catch



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# Technical Program & Global Food Aid

- Technical program: provides resources/expertise to industry and buyers
  - Seafood safety & quality, seafood labelling & certification, RFM program, USDA Nutritional database, Fukushima, mercury
- Global Food Aid: works with government & NGO food aid programs
  - Moved \$42 million canned pink salmon, developing products & markets for under utilized species & byproducts



# Challenges & Opportunities

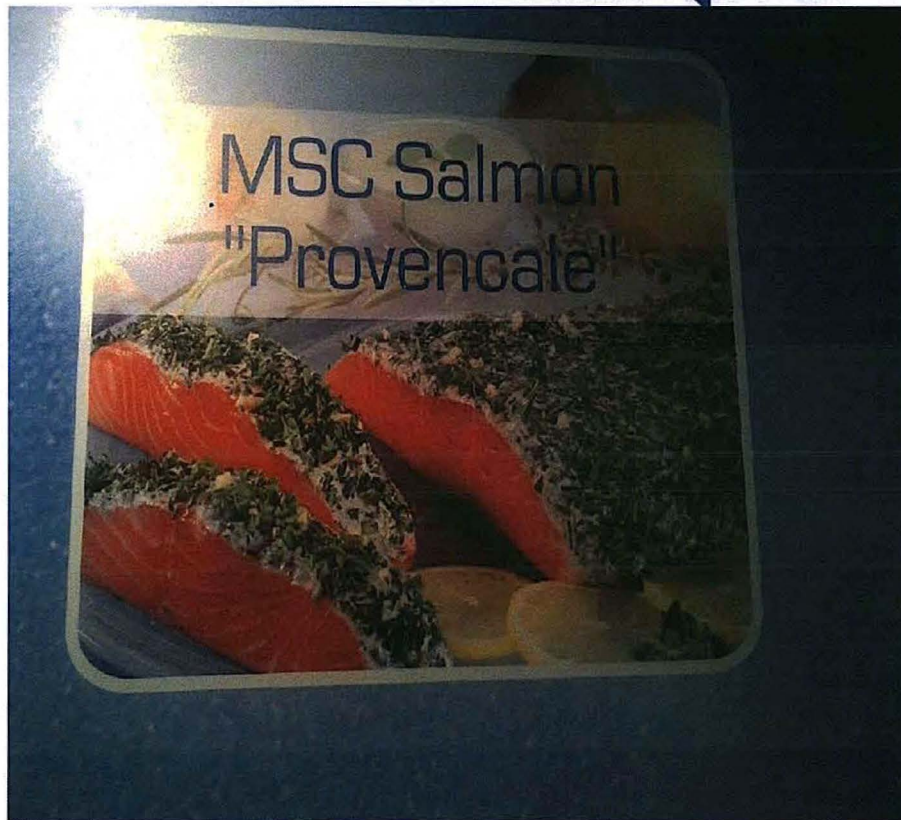
- Promoting canned salmon and other Alaska salmon products.
- Russian trade embargo
- Illegal Russian crab impacts
- Competition: high tilapia prices, other proteins-beef, chicken, pork
- Fiscal challenges
- Seafood certification



# Responsible Fisheries Management (RFM)

- Market requires 3<sup>rd</sup> party certification
- State partnered with MSC in 2000
- Private organization – changes fees & standards
- Alaska brand being eroded
- Iconic seafood reduced to commodity
- Interference with governance of Alaska resources
- Force gov't change through restricted market access
- 2010 – Developed RFM      2012 – Most salmon producers withdrew
- Backlash from eNGO community – Alaska lost customers
- 2014 – Board directs major changes to RFM program
- Critically important to State and Seafood Industry

## Example...



- ***“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*

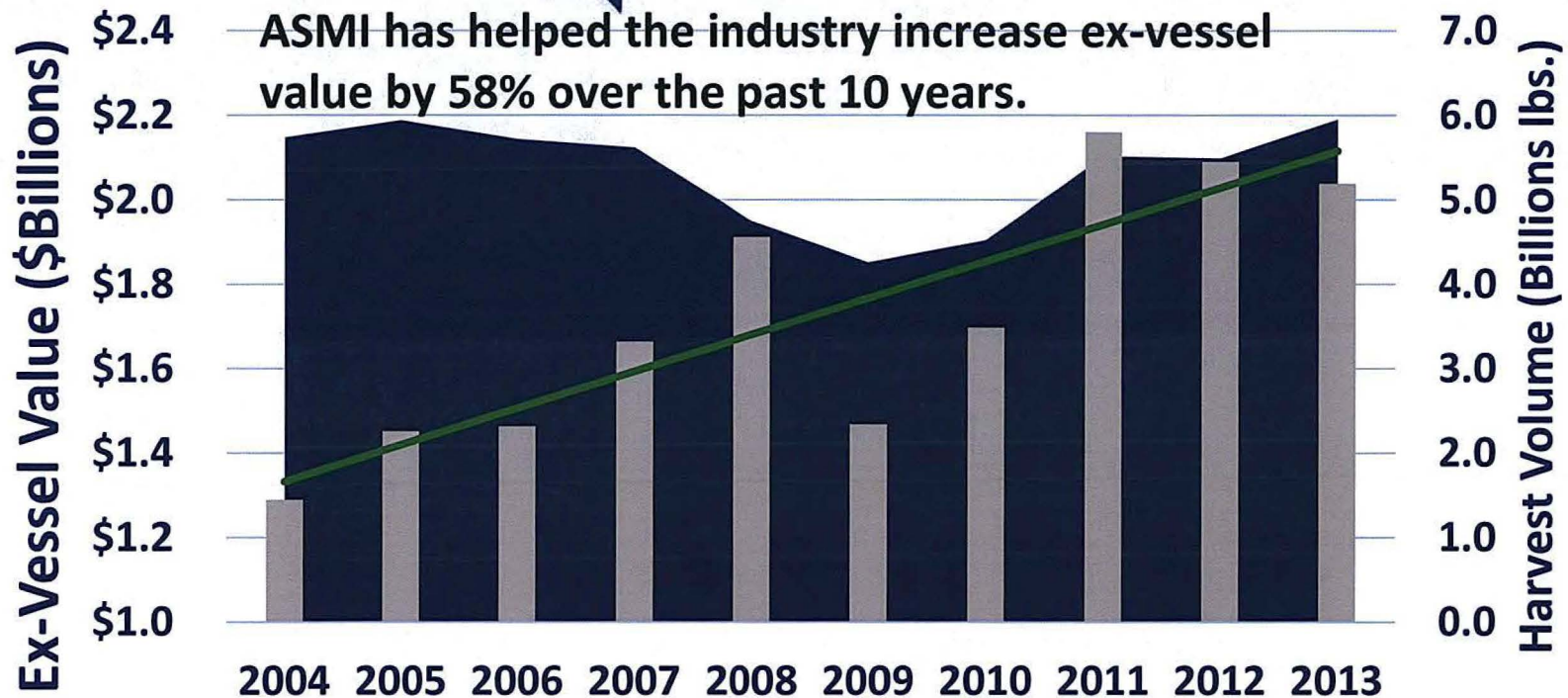


# Alaska Seafood is a Major Economic Driver

- Creates jobs directly for +60,000 workers in Alaska
  - Plus another +10,000 indirect jobs
- 1-in-8 workers in Alaska related to seafood industry
- Contributes over \$100M in local/state tax revenue
- Creates jobs for 165,000 U.S. workers
- **Seafood is the largest private sector employer in AK with more labor income than mining and tourism combined.**



# Increasing the Value of Alaska Seafood



- Harvest Volume (Billions lbs.)
- Ex-Vessel Value (\$Billions)
- Linear (Ex-Vessel Value (\$Billions))

# Questions?

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