



Wild, Natural & Sustainable®

ALASKA SEAFOOD MARKETING INSTITUTE

FY19 INTERNATIONAL PROGRAM BUDGET

Hannah Lindoff, International Program Director– May 10, 2018

FY19 PROGRAM Budget Overview



Wild, Natural & Sustainable®

Program	FY 17	FY 18	FY 19 Proposed
Program Operations	\$1,172,000	\$840,000	\$875,000
Japan	\$1,178,754	\$1,201,500	\$1,001,109
China	\$885,000	\$923,479	\$1,020,479
NEU	\$942,831	\$982,831	\$977,831
WEU	\$943,000	\$1,000,000	\$856,580
CEU	\$529,500	\$559,000	\$674,876
SEU	\$585,500	\$621,100	\$664,100
Brazil	\$403,125	\$429,025	\$373,025
EEU	\$145,000	\$160,000	\$182,000
Evaluation	\$100,000	\$105,000	\$100,000
Global	\$70,000	\$25,000	\$25,000
Totals	\$6,954,710	\$6,846,935	\$6,750,000



FY19 PROGRAM Budget Highlights



Wild, Natural & Sustainable®

- From FY 16 to FY 17 we cut ~ \$1 million from our program
- From FY 17 to FY 18 we reduced -\$107,775
- From FY 18 to FY 19 we need to reduce -\$96,935
- Brazil reduced due to difficulty in the market
- Japan reduced in favor of other markets where the IMC feels we can make more impact
- Increases to China, SEU and EEU
- WEU and CEU consumer advertising eliminated
- Flat “Global” line compensated by GBI & other partnerships
- Further cuts to ASMI HQ impossible- additional staff member



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FY19 PROGRAM Budget Highlights



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FY18	FY19
MAP: \$4,215,811	MAP: \$4,212,420
Match: \$2,631,124	Match: \$2,537,580
Total: \$6,846,935	Total: \$6,750,000

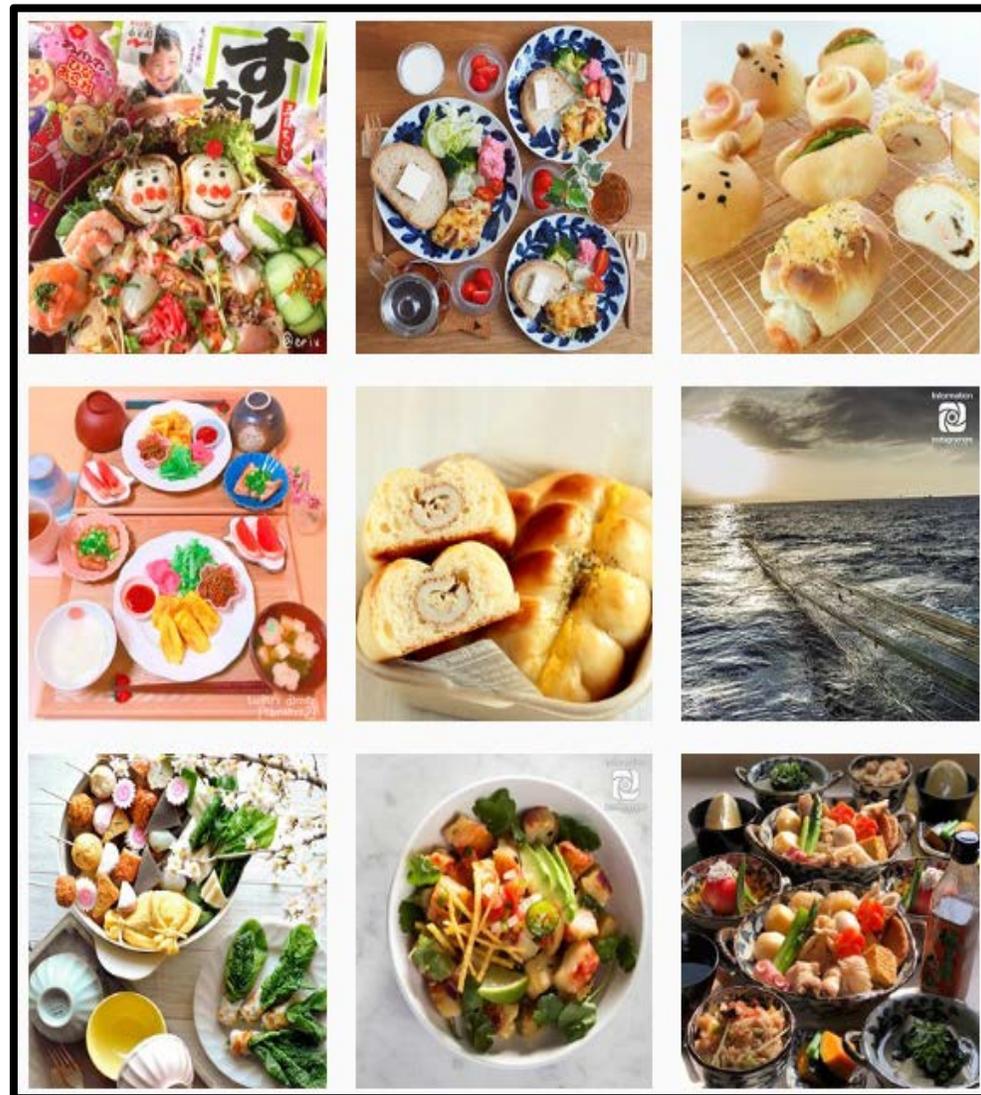
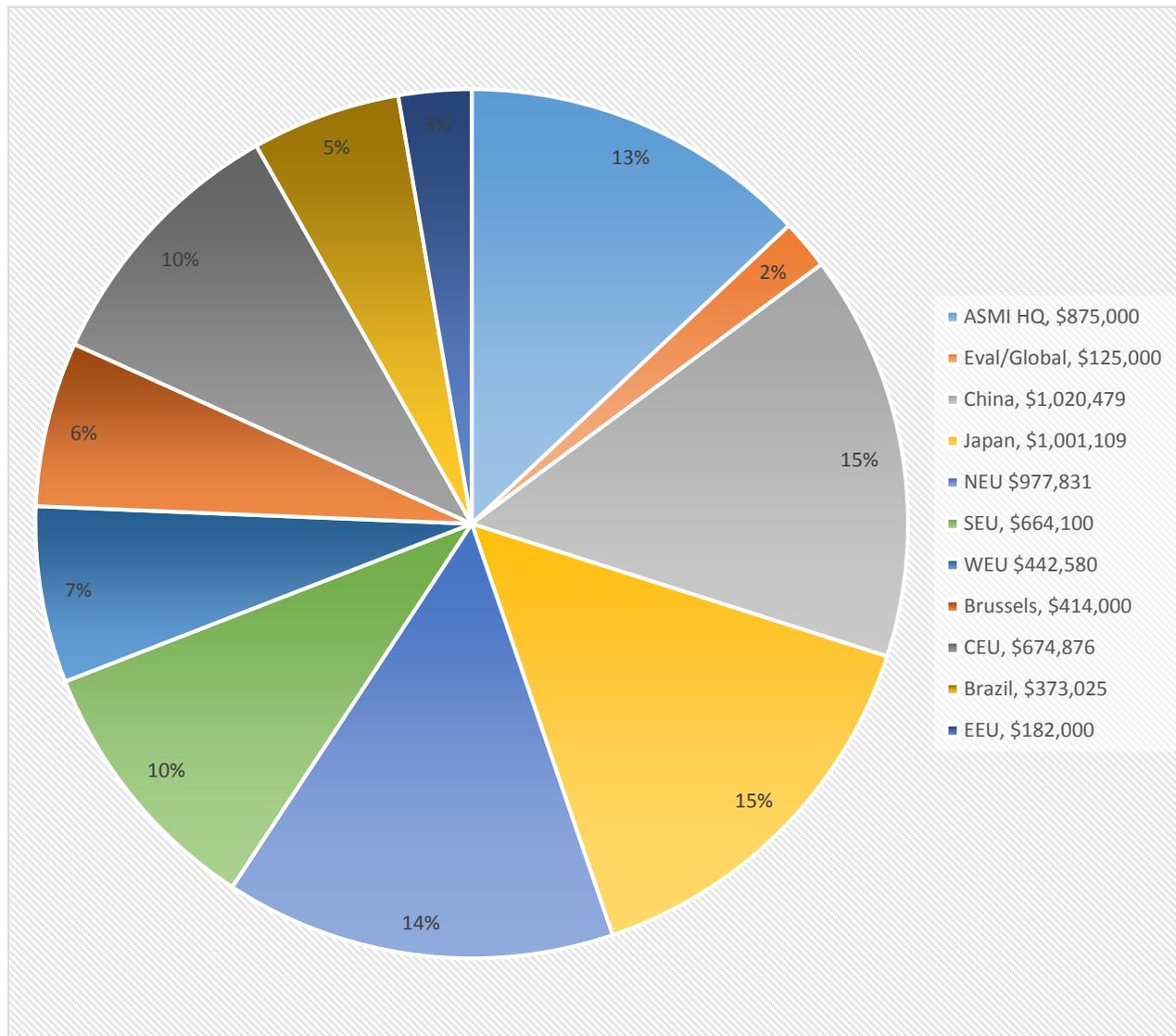
- \$3,391 in MAP funds
- \$93,544 in Match funds

American Hardwood Export Council, APA - The Engineered Wood Association, Softwood Export Council, and Southern Forest Products Association	\$8,288,044
American Peanut Council	\$2,476,322
American Pistachio Growers/Cal-Pure Pistachios, Inc.	\$1,727,107
American Seed Trade Association	\$439,432
American Sheep Industry Association	\$466,163
American Soybean Association	\$5,392,595
American Sweet Potato Marketing Institute	\$194,616
Blue Diamond Growers/Almond Board of California	\$5,007,111
Brewers Association, Inc.	\$706,138
California Agricultural Export Council	\$1,012,453
California Cherry Marketing and Research Board	\$565,952
California Cling Peach Growers Advisory Board	\$469,696
California Fresh Fruit Association	\$405,160
California Olive Committee	\$100,000
California Pear Advisory Board	\$318,604
California Prune Board	\$2,910,225
California Strawberry Commission	\$147,671
California Table Grape Commission	\$3,285,343
California Walnut Commission	\$3,910,766
Cherry Marketing Institute	\$234,853
Cotton Council International	\$14,589,833
Cranberry Marketing Committee	\$1,798,288
Distilled Spirits Council of the United States	\$409,021
Florida Department of Citrus	\$3,461,630
Florida Tomato Committee	\$253,358
Food Export Association of the Midwest USA	\$8,871,605
Food Export USA Northeast	\$9,021,600
Ginseng Board of Wisconsin	\$438,487
Hop Growers of America	\$369,840
Intertribal Agriculture Council	\$733,553
Mohair Council of America	\$139,525
National Association of State Departments of Agriculture	\$1,028,595
National Confectioners Association	\$1,333,406
National Pecan Growers Council	\$621,033



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FY19 International Budget Overview

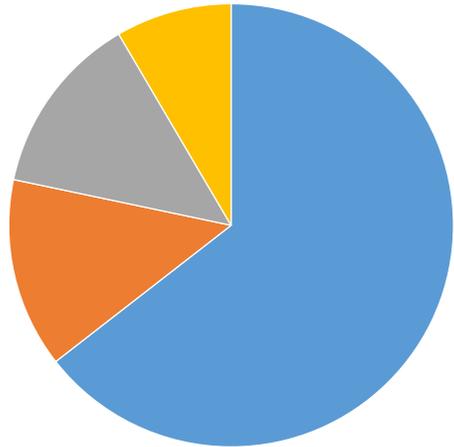


FY19 International Program Operations



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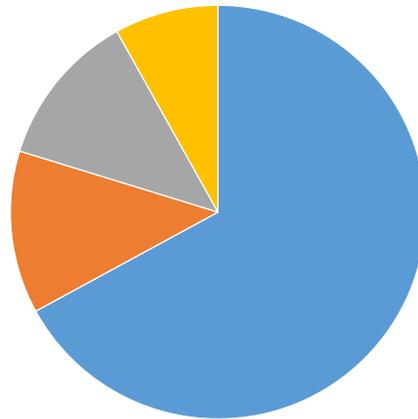
ASMI Program Operations FY18



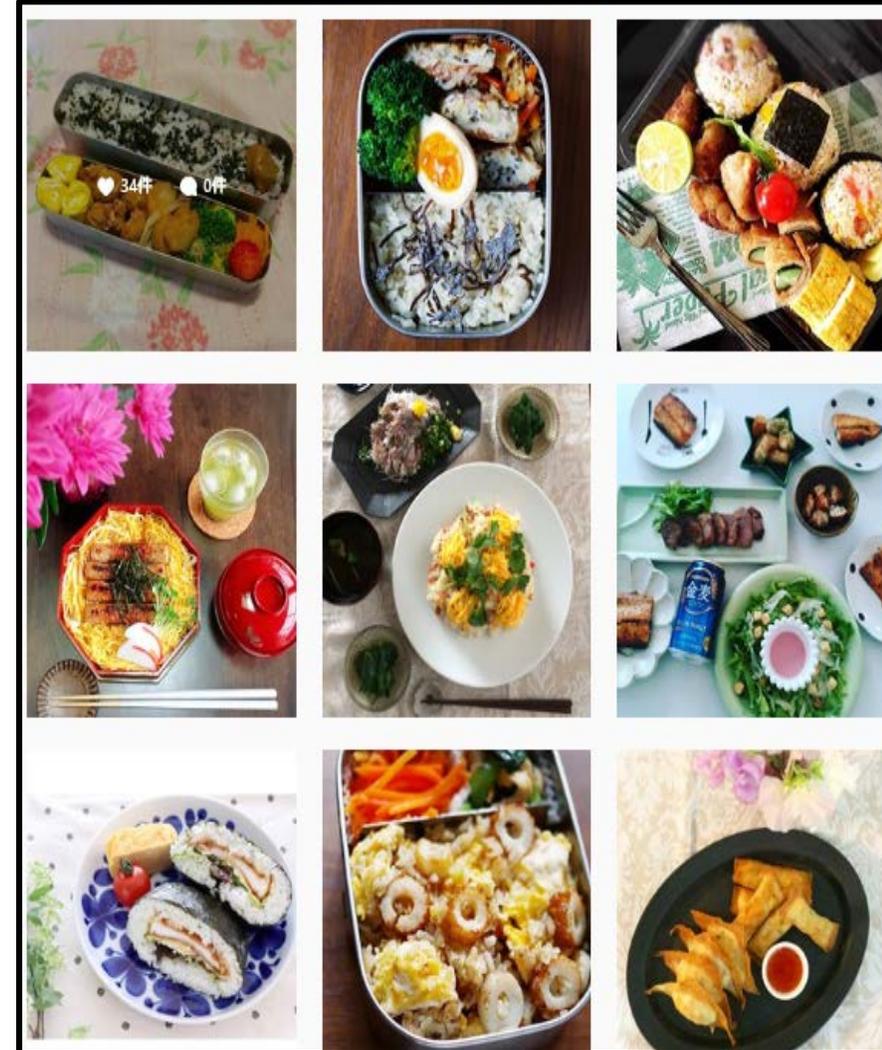
- Personal services, \$535,000
- Consolidated Expenses, \$115,000
- Staff Travel, \$110,000
- Product/materials 70,000

Consolidated expenses -4%,
 Travel -5%
 Personal services +8%
 \$10,000 for trademark fees not included in chart

Program Operations FY19



- Personal Services, \$580,000
- Consolidated Expenses, \$110,000
- Staff Travel, \$105,000
- Product/materials, \$70,000

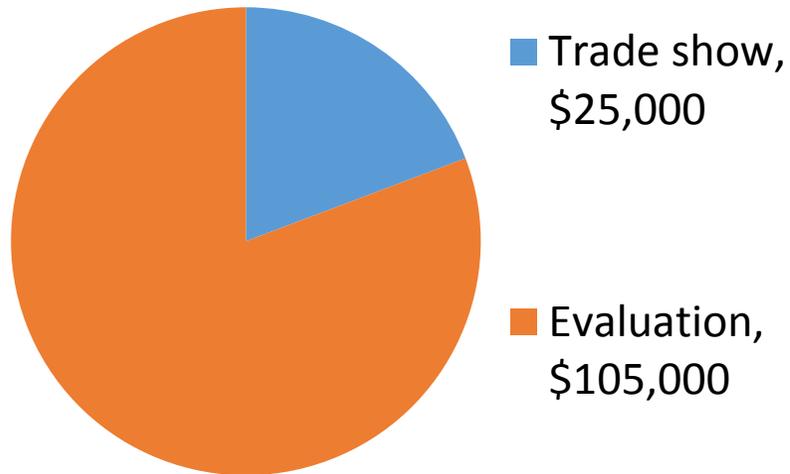


FY19 Global Budget: \$125,000 -4%

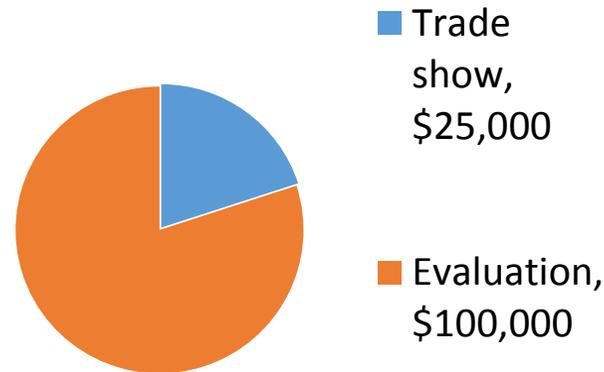


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Global FY18



Global FY19



Global evaluation, \$100,000 -5%

Trade show, \$25,000

Total savings: \$5,000

American Seafood

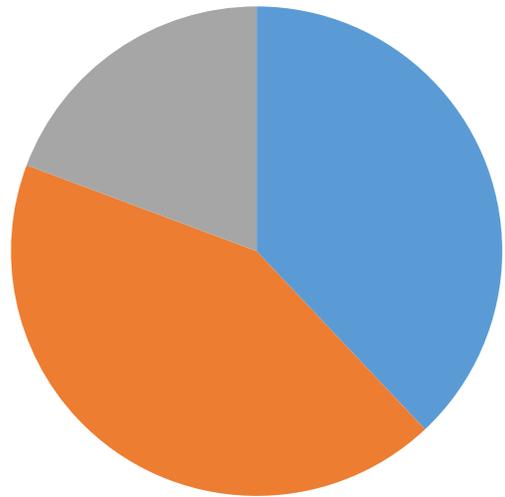
ALASKA SEAFOOD Wild, Natural & Sustainable®
AMERICAN Indian Foods
Food Export Association of the Midwest
Food Export Northeast
WUSATA
SUSTA Southern United States Trade Association

FY19 NEU Budget: \$977,831 -1% Budget: \$1,001,10 -17



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FY18



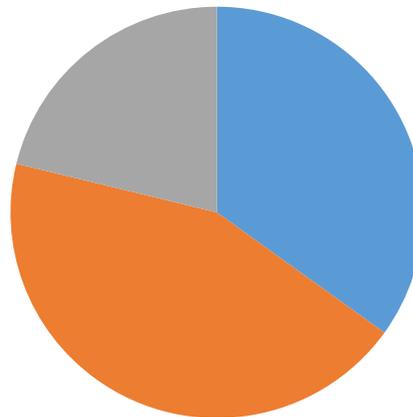
- Consumer, \$279,572
- Trade, \$314,585
- HRI, \$142,000

FY19 Breakdown:

Consumer PR \$181,000 -2%
Consumer Ads \$94,572

Trade PR/ads: \$40,167
Retail Merch.: \$268,418
Website: \$6,000

FY19



- Consumer, \$250,572
- Trade, \$314,585
- HRI, \$152,000

FS Promo: \$102,000
FS Pr/Ads: \$50,000
Travel: \$8,500 -11%
Retainer: \$227,174
Total savings: \$5,000



alaskaseafooduk 20h

Welcome canapés -
pollock done three ways
#AlaskaSeafood360



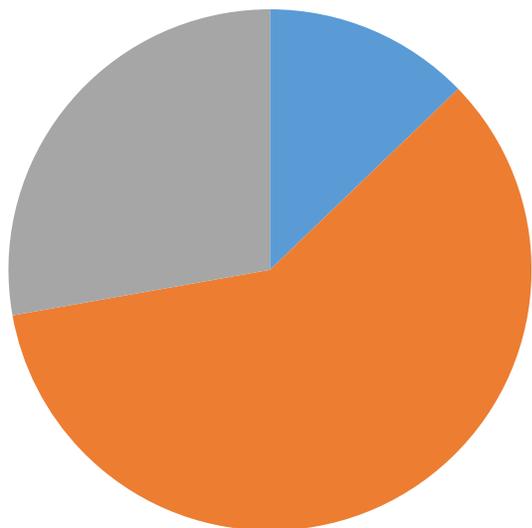
@adschef @thefrenchmcr
@thestaffcanteen



Wild, Natural & Sustainable®

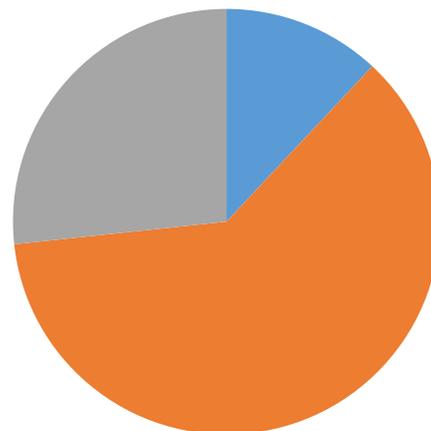
FY19 China Budget: \$1,020,479 +11%⁻¹⁷

FY18



- Consumer, \$103,479
- Trade, \$481,000
- HRI, \$225,000

FY19



- Consumer, \$108,479
- Trade, \$556,000
- HRI, \$242,000

FY19 Breakdown:

- Consumer PR: \$108,479 +5%
- Trade PR/ads: \$106,000 -10%
- Retail Merch: \$200,000 +8%
- Web promotions: \$140,000 +56%
- Trade shows: \$110,000
- Contractor travel: \$12,000
- FS Promo: \$103,000
- Chef Seminars: \$54,000 +38%
- Training school: \$35,000 +6%
- Chef competition: \$50,000
- Retainer: \$102,000
- Total increase: \$97,000**

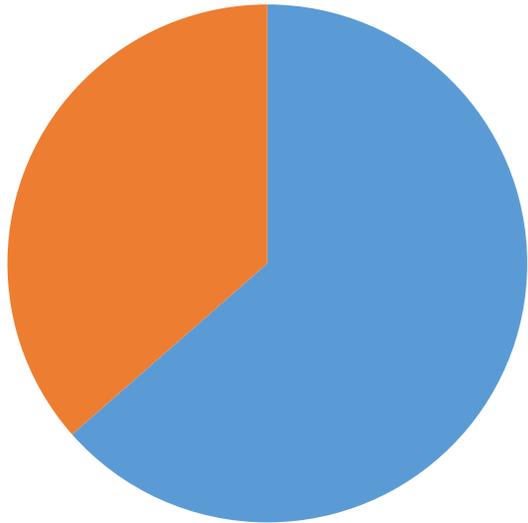


FY19 SEU Budget: \$664,100 +7%



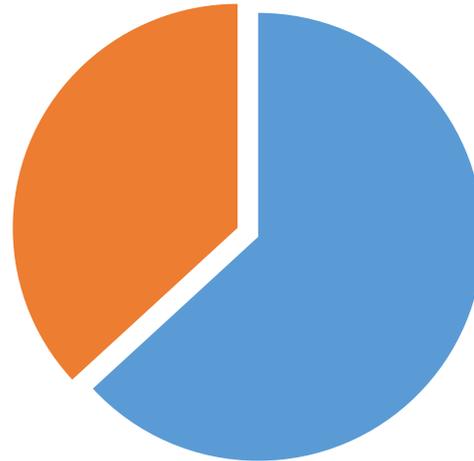
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FY18



Trade, \$312,600
HRI, \$179,500

FY19



Trade, \$307,600
HRI, \$179,500



FY19 Breakdown:

Trade shows: \$109,600 +10%
Trade ads: \$31,000
Retail Merch.: \$107,000

Trade PR: \$79,000 +10%
Website: \$6,000
Contractor travel: \$7,000 -22%

HRI trade shows: \$114,000 +15%
FS promo: \$30,000 +50%
Chef seminars: \$60,500
Retainer: \$120,000
Total increase: \$43,000

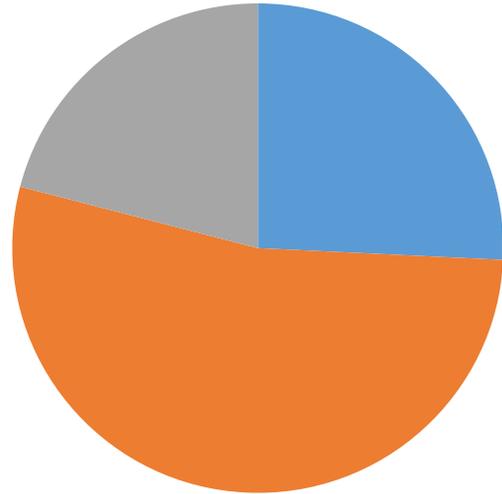
FY19 WEU Program Budget: \$556,580

Brussels: \$414,000 additional funds -2%



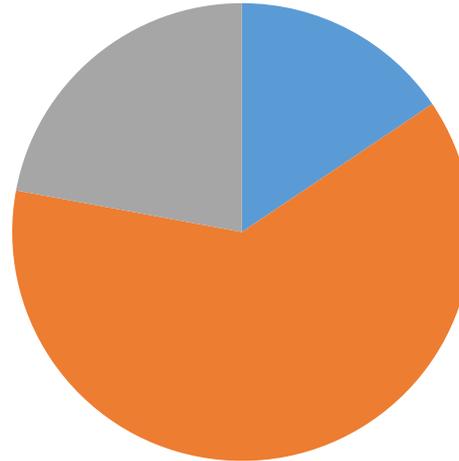
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FY18



- Consumer, \$118,000
- Trade, \$244,000
- HRI, \$96,000

FY19



- Consumer, \$67,580
- Trade, \$271,000
- HRI, \$96,000

FY19 Breakdown:

- Consumer ads: \$0.0 -100%
- Consumer PR: \$67,580 +4%
- Contractor travel: \$8,000

- Trade PR/Ads: \$72,000
- Retail Merch.: \$185,000+10%
- Website: \$14,000 +250%
- Trade shows: \$414,000 (SEG)

- FS Promo: \$66,000
- HRI tradeshow: \$15,000
- Chef seminars: \$15,000
- Total savings: \$19,420**

ALASKA SEAFOOD
Wild, Natural & Sustainable®

EUROPEAN SEAFOOD EXPOSITION
24-26 April 2018
BRUSSEL
ASMI booth Hall 6
#1126, 1127 and 1143

ALASKA – GOING WILD FOR SUSTAINABLE SEAFOOD

In Alaska, sustainability is more than just a word, it is the common belief of all fishermen. Dedicated to strict guidelines, the fishing industry in Alaska carries on the heritage of previous generations and secures the future for the ones that follow.

Visit us at Seafood Expo Global and learn about our responsible fishing practices, the origin Alaska and its diversity of high quality seafood species.
ASMI BOOTH HALL 6 #1126, 1127 AND 1143.

MEET OUR COMPANIES:

• Alaskan Leader	• Clipper Seafoods	• North Pacific Seafoods	• Seafood Producers Cooperative
• Arrowac Fisheries	• Dana F. Besecker Co.	• Ocean Beauty Seafoods	• Silver Bay Seafoods
• Blue North	• Ekuk Fisheries	• O'Hara Corporation	• Trident Seafoods
• Bornstein Seafoods	• Glacier Fish Company	• Pacific Harvest Seafoods	• Whittier Seafood
• Cascadia Seafoods	• Icy Strait Seafoods	• Pacific Seafood	

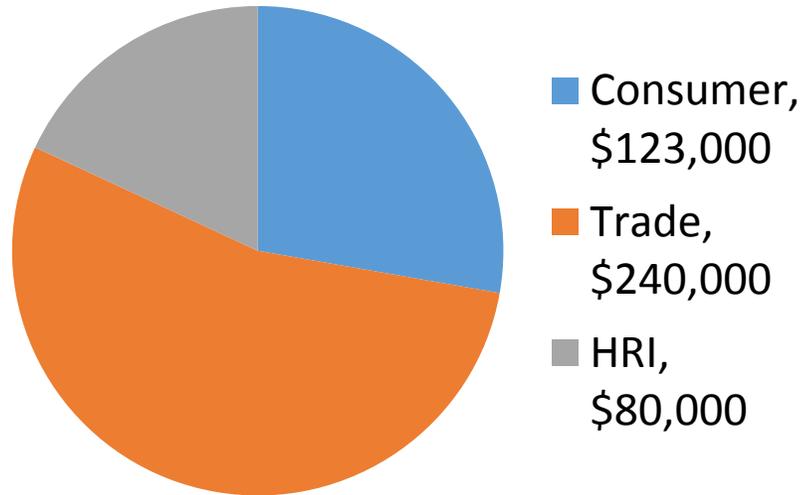
www.alaskaseafood.eu

FY19 CEU Budget \$674,876 -1%

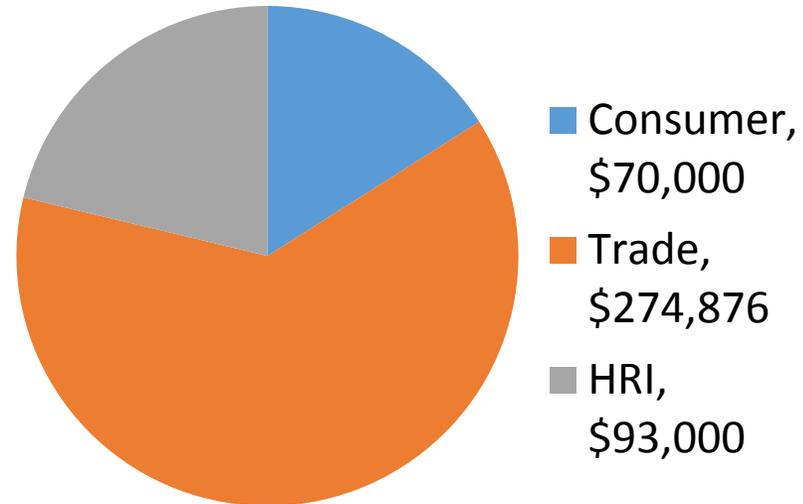


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FY18



FY 19



FY19 Breakdown:

Consumer ads: \$0.0 -100%
 Consumer PR: \$70,000 -4%
 Trade PR: \$75,000 + 3%

Trade shows \$30,000
 Retail Merch. \$153,000 +17%
 Website: \$16,876 +181%
 Contractor travel: \$9,000 -25%

FS Promo: \$60,000 +9%
 HRI Trade show: \$18,000 +20%
 Chef seminar: \$15,000 +50%
 Retainer: \$228,000
Total savings: \$8,124



Alaska seafood counter

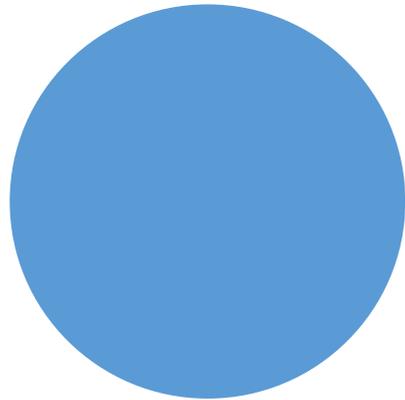
Fish International, Bremen

FY19 EEU Budget: \$182,000 +14%



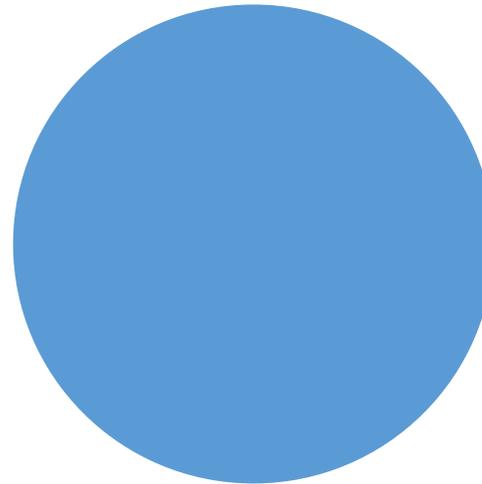
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FY18



- Trade, \$108,000
- HRI, \$0

FY19



- Trade, \$130,000
- HRI, \$0

FY19 Breakdown:

- Trade PR/Ads: \$40,000 +5%
- Trade shows: \$20,000 +33%
- Retail Merch: \$70,000 +27%

- FS promo: \$0,
- Contractor travel: \$12,000
- Retainer: \$40,000
- Total increase: +\$22,000**



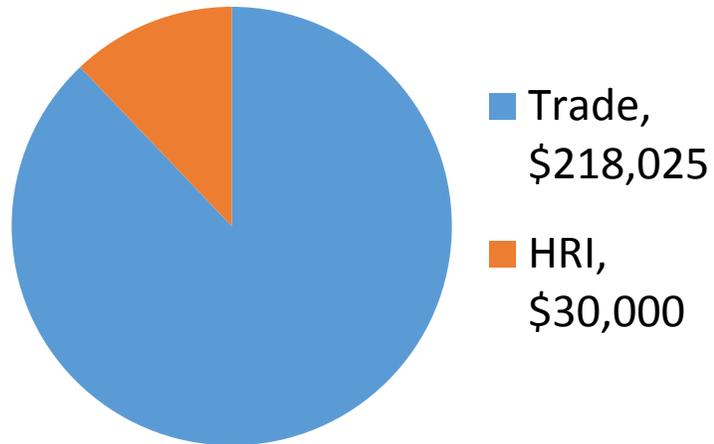
ASMI / Gelios cod and pollock roe promotion during Maslenitsa and Easter

FY19 Brazil Budget: \$373,025 -13%

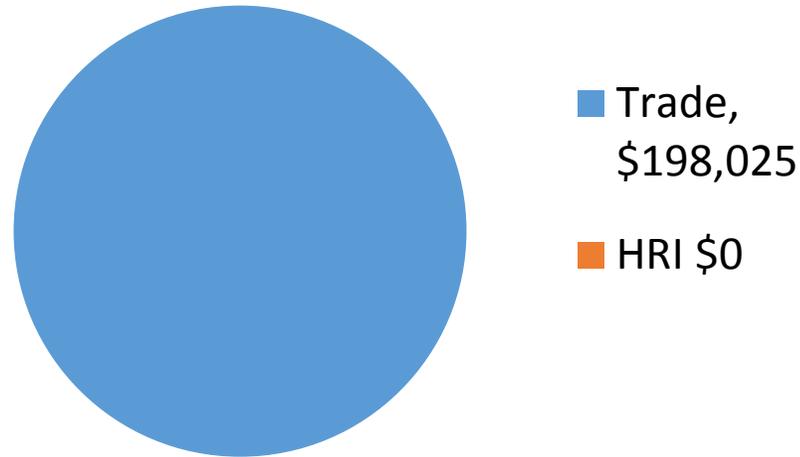


Wild, Natural & Sustainable®

FY18



FY19



FY19 Breakdown:

Retail Merch: \$131,025 -13%

Trade PR/Ads: \$57,000

Website: \$10,000

Foodservice Promo: \$0 -100%

Contractor travel: \$10,000 - 38%

Trade Mission: \$0

Retainer: \$165,000

Total savings: \$-56,000



Seafood Brasil Magazine



Wild, Natural & Sustainable®

Budget Efficiencies and Collaborations

USA Seafood SE Asia GBI (\$237,150)

*A trade mission will be conducted in **September**, just after **Seafood Expo Asia**, in **Hong Kong**.*

The mission will target Vietnam

The GBI will include some promotional \$ for Singapore and Thailand.

USDA Cochran Program:

Vietnam in-bound mission March 2018

USDA Cochran Program: (\$60-65K)

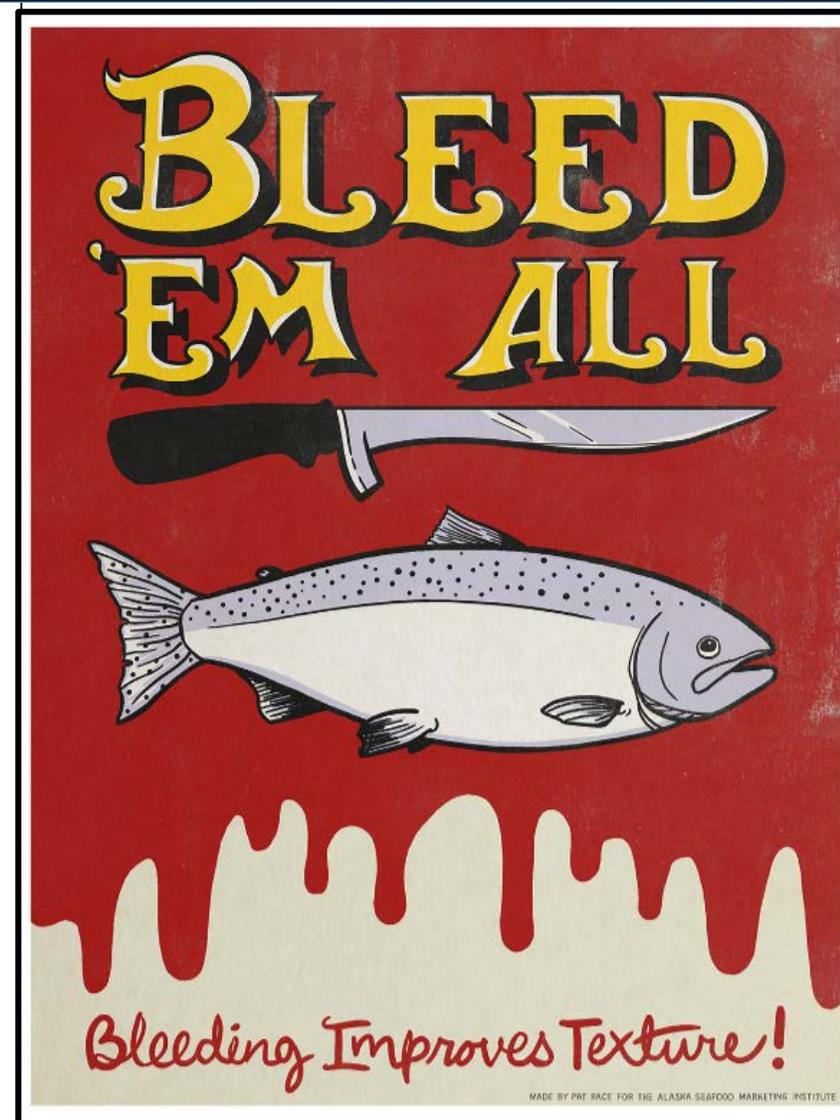
Ukraine in-bound mission July 21-Aug. 3

EMP for Alaska native seafood in China and Thailand: *(run through American Indian Foods. Budget unknown)*

USA Seafood Reception at Brussels

Joint reception with Embassy and Food Export USA

Governor's mission to China

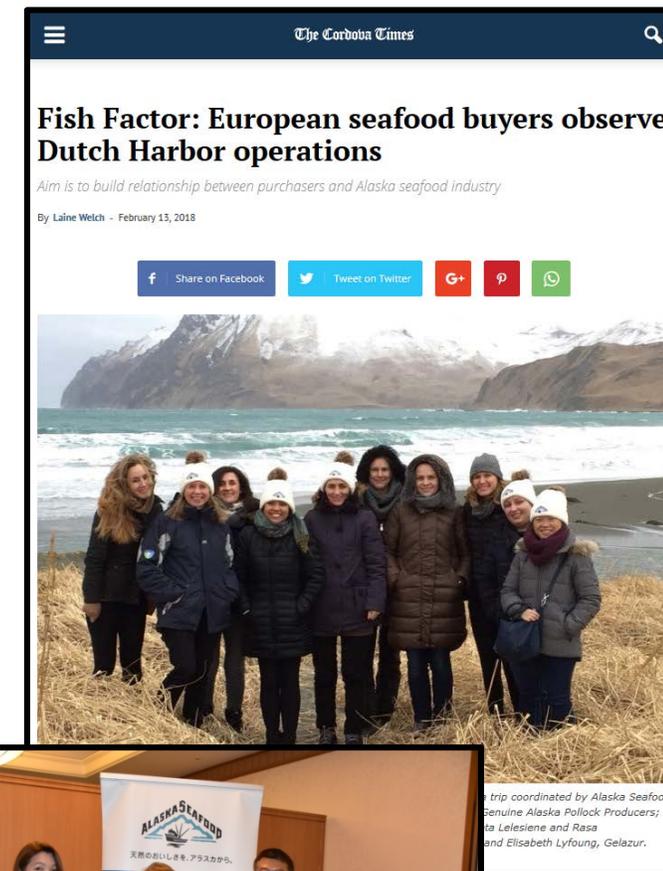




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Collaborations

- **Work with Communications Program to generate in-state PR when conducting International activities**
- **Seafood University 2.0 production in partnership between NEU, Domestic and Technical with an NEU lead and budget**
- **Further EU OMR cooperation and consolidation-materials printed in bulk for cost savings**
- **Japanese chefs conducting trainings in China**
- **Collaborations with GAPP: Tokai Denpun Food Festival, DH mission, German program**



PROGRAM CHALLENGES

- Time consuming and expensive program audits
- Uncertain federal funding
- China:
 - I. Political uncertainties;
 - II. Censorship;
 - III. Potential trade war/tariffs???
- EU:
 - I. potential trade war/CETA;
 - II. less ASMI spending power due to exchange rate;
 - III. anti-US sentiment over Paris Accords etc.
- The UK: “Fewer people eating less canned salmon, less often”
- Japan: Aging population, weakening demand
- Brazil: Red tape around imports remains significant
- Plastic



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US planes, oil and crops on the line



Trump hits China with tariffs and sparks fear of global trade war

BREAKING Dow sinks on trade jitters

Opinion: Trump sticks two thumbs in China's eye

Best of original videos



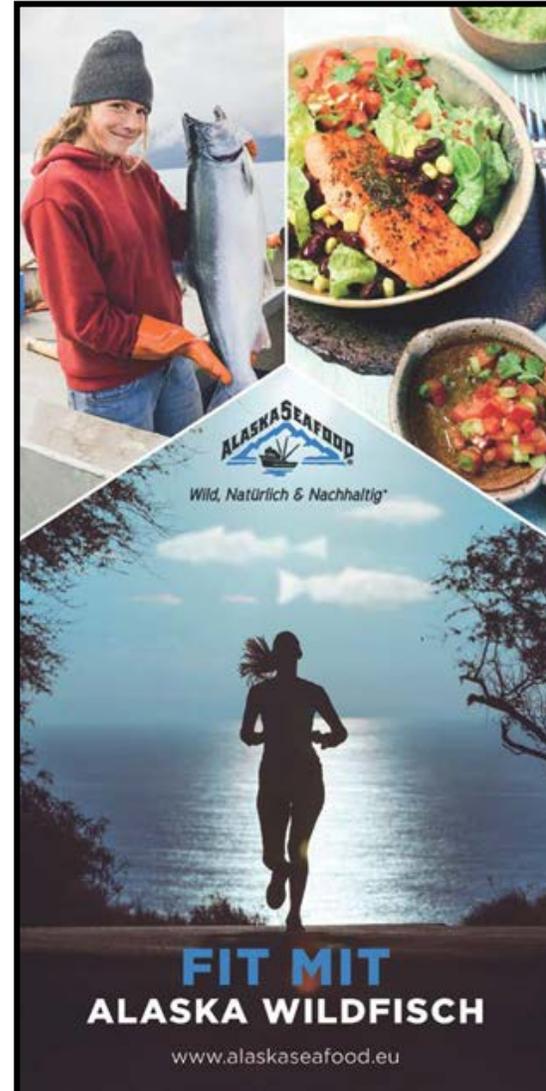
Yes, you might be eating plastic

PROGRAM OPPORTUNITIES



Wild, Natural & Sustainable®

- Exchange rate favorable for exports
- Eating for health is growing in all markets
- Sustainability is becoming a concept in new markets: Japan, China, Spain
- Collaborations have been growing
- SE Asia access
- Women in Seafood movement
- Product innovations
- Retail innovations/e-commerce



天然のおいしさを、アラスカから。
サステイナブルシーフード

UPCOMING PROGRAM EVENTS



Wild, Natural & Sustainable®



Alaska Seafood Marketing Institute 2018/2019 INTERNATIONAL TRADE EVENTS

September 2018

Seafood Show	São Paulo	Brazil	September 2-4, 2018
Riga Food	Riga	Latvia	September 5-8, 2018
Chef-Sacha	Cologne	Germany	September 16-17, 2018
World Food Moscow	Moscow	Russia	September 17-20, 2018
Japan International Seafood & Tech Expo	Tokyo	Japan	September 22-24, 2018

October 2018

CONXEMAR	Vigo	Spain	October 2-4, 2018
San Sebastian Gastronomika	San Sebastian	Spain	October 7-10, 2018
World Food Ukraine	Kiev	Ukraine	October 23-25, 2018
Tallinn Food Fair	Tallinn	Estonia	October 25-27, 2018
All Hands Meeting	Anchorage	Alaska	October 28-31, 2018
World Food Kazakhstan	Almaty	Kazakhstan	October 31-November 2, 2018

November 2018

Indaara	Bucharest	Romania	October 31-November 4, 2018
China Fisheries & Seafood Expo	Qingdao	China	November 7-9, 2018
Forech International ExpoForum	Kiev	Ukraine	November 13-15, 2018
Forum Gastronomic de Girona	Gerona	Spain	November 18-20, 2018

January 2019

Madrid Fusion	Madrid	Spain	January 28-30, 2019
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February 2019

Supermarket Trade Show	Chiba	Japan	February 2019
Seafood Show	Osaka	Japan	February 2019

March 2019

Identità Golose	Milan	Italy	March 2-4, 2019
ANUFOOD Brazil	São Paulo	Brazil	March 12-14, 2019
Seafood Expo North America	Boston	USA	March 17-19, 2019
Gastro Vision	Hamburg	Germany	March 2019

April 2019

Salon de Gourmets	Madrid	Spain	April 8-11, 2019
Fontearo	Kiev	Ukraine	April 2019

SIAL CHINA, SHANGHAI

Shanghai, May 16-18

CULINARY RETREAT, TUTKA BAY, AK

July 10-13, 2018

CHINA IN-BOUND MISSION-SEATTLE, KODIAK

July 8-13, 2018

UKRAINE IN-BOUND MISSION- SE AK, DH

July 21-Aug. 2, 2018

IMC MEETING

Seattle, Aug. 20, 2018

AMERICAN SEAFOOD GBI

Vietnam, Sept. 2018

SIAL
INSPIRE FOOD BUSINESS



MEET THE SUPPLIER : ALASKA SEAFOOD BY CLAIRE BOSI

Chef

TAKE A WALK ON THE WILD SIDE

IN 2007, THE MANCHESTER-BORN CHEMICAL BROTHERS RELEASED A TRACK FROM THEIR ALBUM WE ARE THE NIGHT CALLED "THE SALMON DANCE". AN ODD CHOICE FOR A SONG TITLE, THE LYRICS TELL OF THE IMPORTANCE OF KEEPING OUR OCEANS AND SEAS CLEAN, OF HOW SALMON HAVE A SENSE OF SMELL KEENER THAN A DOG OR BEAR, AND THE WAY IN WHICH THEY RELY ON THE GRAVITATIONAL PULL OF THE MOON TO FIND THEIR WAY HOME TO SPAWN.

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Thank you!



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