



ALASKA SEAFOOD MARKETING INSTITUTE
NORTHERN EUROPE – IMC PRESENTATION





DEAL OR NO DEAL



@#!?* BREXIT



UK due to leave the EU on 29 March 2019 - the settlement has not yet been agreed.

Teresa May says 95% has been agreed. **FCA 14 of 236 EU international treaties**

Major sticking point remains the NI/Ireland border

Both parties **seeking to avoid** a hard border currently there is no viable solution.

Proposal to extend the transition agreement to 2022 but what wholly unpopular in UK.

DEAL

Free Trade Agreement with EU will ensure **frictionless trade**, the transition will run to December 2020

NO DEAL

Wide ranging implications on trade and economic growth for both EU and UK.

No deal Brexit will mean immediate customs and regulatory checks

Both parties will have to pay tariffs on each others goods.

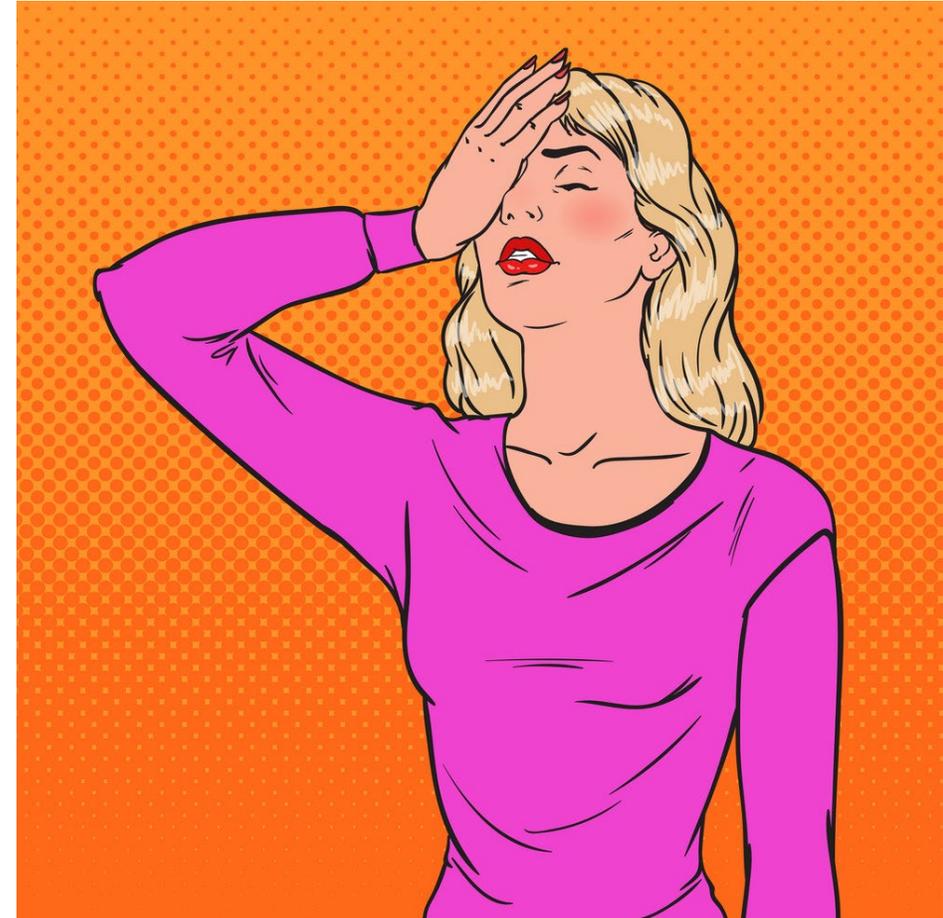
Delays at customs – limited access to food and medicines.

Implementation of a new import notification system.

RULES OF ORIGIN

Rules of origin are complex rules that determine the ‘economic nationality’ of a product for tariff purposes and may cause issues for importers.

This may mean that AK product transformed within the EU will be subject to US tariff rates when entering UK unless product exemptions can be agreed



Economic Overview

- GDP growth expected at 1.3%. The stronger global economy, and the weak pound have boosted UK exports and inbound tourism.
- 2.6% GDP growth in NL – business investment has increased, consumer confidence is up but Brexit will impact the Dutch trade outlook as the country is considered as the most exposed to “the conjuncture” in Great Britain.

Seafood Consumption

- 2017 NEU receives 10.6% of ASMI exports 11.16% (Val)
- Total UK retail seafood sales worth **£3.81bn** up +4.1% in value, down 1.6% in volume, consumed on average 1.5 times / week
- Currency instability remains a challenging issue for seafood
- Like-for-like inflation: 2.03% in last 12 weeks
- Young consumers less likely to accept inflated costs
- Protein consumption is down overall – the rise of the vegan/flexitarian

Retail overview

- Battle for consumer interest, more consolidation of supermarket giants such as Sainsbury’s and ASDA
- In June 2018, combined Aldi and Lidl took a 19.6% volume share of total UK seafood sold in multiple retail
- Traditional retail under attack from online, food box delivery and fast food delivery companies like Just Eat and Deliveroo – 19m users up 15% yoy
- Introducing new lines continues to be struggle

Hottest summer on record

- +30m BBQ occasions over the summer in comparison to 2017
- -600k fish BBQ occasions compared to 2017
- Frozen seafood classics marginalised as ice-cream, ice and frozen deserts dominated
- Industry-wide effort required to influence change in BBQ trends and eating habits



An underwater photograph showing a dense concentration of plastic waste, including clear plastic bags and fragments, floating in the water. Several fish are visible, including a prominent red butterflyfish in the lower left and a yellow and white striped fish in the upper right. The water is a deep blue-green color.

By 2050, there will be more plastic by weight than fish in the ocean.





ALASKA SEAFOOD

SOME CAMPAIGN HIGHLIGHTS

WOMEN IN SEAFOOD



Inspired by the women who work across the seafood industry in Alaska, we ran a multi channel campaign using women to promote diversity within the seafood industry.

Authentic storytelling formed part of NEU's corporate messaging allowing us to promote the roles of women as fishermen, corporate leaders and everything in between.

Campaign strands:
 Parabere Fourm
 Intrafish Women in Seafood
 Partnership with Ladies of Restaurants
 Caterer Campaign



BAKED ALASKA POLLOCK WITH MAHAMARA AND POMEGRANATE

Serves 4

Ingredients:
 70 grams of Alaska pollock
 100 grams walnuts
 50 grams of Pomegranate
 2 tablespoons paprika Cream
 1 tablespoon tomato puree
 1 tablespoon breadcrumbs
 1 tablespoon olive oil
 1 teaspoon cumin
 1 teaspoon parsley
 3 tablespoon water

Method:

- Chop walnuts and parsley, mix with bread, cumin, water, paprika cream, tomato puree, oil and add some salt and pepper.
- Sprinkle salt and pepper on Alaska pollock. Oven bake in 60 degrees until the fish reaches an inner temperature of 43 degrees. Put it in the fridge to cool down.
- Add a touch of mahamara on each piece of fish and garnish with pomegranate.

ALASKA SEAFOOD
 Wild, Natural & Sustainable
 www.AlaskaForeverWild.com
 @AlaskaSeafoodUK

The panel

- Sally Beck**
General manager, Royal Lancaster London
- Monica George**
International marketing co-ordinator, Alaska Seafood Marketing Institute
- Stephanie Hamilton**
Director of people and culture UK and Ireland, ISS Facility Services UK
- Ruth Hansom**
Executive chef, Hansom Lambert
- Charlotte Jakubecz**
Retail and merchandising manager, BaxterStorey for Amazon HQ
- Susan Marks**
Sustainability director, Alaska Seafood Marketing Institute
- Sarah Miller**
Regional managing director, BaxterStorey
- Beth Ruane**
Foodservice brand manager, Young's Seafood
- Jennifer Santner**
Restaurant manager, Lecture Room and Library at Sketch
- Charlotte Standing**
Third-year student, Westminster Kingsway College
- Joanne Taylor-Stagg**
Former general manager, the Trafalgar St James

THE CATERER

Sustainable futures with ALASKA SEAFOOD Wild, Natural & Sustainable

Susie Brito, fisherman

PROMOTIONAL FEATURE

For Alaska Seafood, sustainability doesn't just relate to fish. It's about creating a sustainable workforce, attracting new talent and promoting the industry as a great place to work. Over the next four months, Alaska Seafood will be unearthing the future stars of the hospitality industry. In part one, we meet Bristol Bay-based fisherman and blogger Susie Brito

PROMOTIONAL FEATURE

For Alaska Seafood, sustainability doesn't just relate to fish. It's about creating a sustainable workforce, attracting new talent and promoting the industry as a great place to work. Over the next four months, Alaska Seafood will be unearthing the future stars of the hospitality industry. In part two, we meet founding director of Ladies of Restaurants, Natalia Ribbe



alaskaseafooduk

alaskaseafooduk #Repost @chefpublishing

Alaska has been leading the way to address some of the concerns that the hospitality industry has been faced with, in order to satisfy both their own consciences and reassure their guests that the fish or seafood they have ordered is, in fact, both protected and encouraged to thrive in the open seas.

@alaskaseafooduk #sustainablefishing #seafood #sustainablefish #sustainableseafood #alaska #alaskaseafood

21 likes
 APRIL 10

Add a comment...

IntraFish

WOMEN IN SEAFOOD

Women in Seafood Leadership Summit

Information

Date: Thursday 6 March 2018 (Catering from Alaska Seafood Forum)

Time: 17:00 - 21:00

Location: RADISSON BLU ROYAL HOTEL, Bergen, Norway

Export to: Google Calendar, Outlook / iCal

Sponsors: ALASKA SEAFOOD, Trident, deutsche see, VERLASSO



Natalia Ribbe
 Founding director of Ladies of Restaurants

FOOD SERVICE



Youngs continue to be an important strategic partner.

This year our campaign included:

Sales training and incentive days with Bidfood sales teams

COSTCO sampling days across 38 stores

A healthy living roadshow with school cooks and junior school children

LACA annual conference led to an introduction to 6 new food service partners

We ran a foodservice chef innovation day with University caterers

Helen Oxley on Women's Mission

The campaign resulted in 18% year on year volume growth against a target of 10% - an increment of over £300K, a nine fold return on investment.

Brakes are part of Cysco have 100,000 customer sites across the UK and 24,000 in Sweden.

Our relationship has gone back to basics.

Canteen takeover

New product development

Logos online and on pack

Hosted events with development chefs and long term product development plan



Youngs FOODSERVICE

WIN £50 SUPERMARKET VOUCHER
16th - 21st June 2018

£50 voucher awarded to the highest number of cases sold (minimum of 50 to qualify) & highest number of new buying customers (minimum of 25 to qualify)

<p>16-20/07/18 Chip Slaw Batterroll Alaska Pollock Fillets</p> <p>Value: 38.24</p> <p>Available from 16th June to 21st June 2018</p> <p>Available for 2 day sampling events to cater for up to 100 people</p> <p>No artificial additives, preservatives or gluten</p>	<p>16-20/07/18 Breaded Alaska Pollock Fillets</p> <p>Value: 39.00</p> <p>Available from 16th June to 21st June 2018</p> <p>Available for 2 day sampling events to cater for up to 100 people</p> <p>No artificial additives, preservatives or gluten</p>	<p>16-20/07/18 Free From Fish Fingers</p> <p>Value: 17.71</p> <p>Available from 16th June to 21st June 2018</p> <p>Available for 2 day sampling events to cater for up to 100 people</p> <p>No artificial additives, preservatives or gluten</p>	<p>16-20/07/18 Pink Salmon & Alaska Pollock Pieces</p> <p>Value: 38.20</p> <p>Available from 16th June to 21st June 2018</p> <p>Available for 2 day sampling events to cater for up to 100 people</p> <p>No artificial additives, preservatives or gluten</p>
----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

www.youngsfoodservice.co.uk
www.alaskaforeverwild.com

JERK MARINATED MSC SOCKEYE SALMON FILLET WITH MANGO RICE

MSC UK Foodservice
Wholesaler of the Year 2018

CERTIFIED SUSTAINABLE SEAFOOD MSC

www.msc.org

ALASKA SEAFOOD
Wild, Natural & Sustainable

P23957 / F123957

BBE AREA
35 mm x 17 mm

12 x 400g e

5 024333 242604

This product comes from a fishery that has been independently certified to the MSC's standard for a well-managed and sustainable fishery, www.msc.org.

MSC OMEGA 3 FISH FINGERS

ALASKA SEAFOOD
Wild, Natural & Sustainable

YOUNG'S FOODSERVICE

GREEN IN WRAPS

TURN OVER FOR HEATERS

MADE FROM WILD ALASKA FISH



F 36196

M&J Seafood MSC Wild Alaskan Pink Salmon Suprêmes (skin on, boneless)

10 x 140-170g

£26.99

(£2.70 /ea)

SAY HELLO TO THE FISH TACO

YOUNG'S FOODSERVICE

FIT FISH



HEALTH continues to be a driver for consumption:

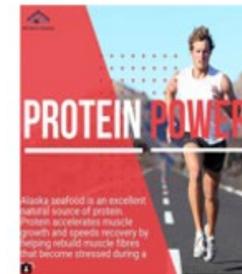
- Servings chosen for health are now worth £2.3bn per year
- Consumers are prepared to pay up to 9% more for a product purchased for health purposes.
- 1 in 7 people have a gym membership (+5% vs 2017)
- Half of Brits tried to lose weight in 2017
- Sales of speciality diet and fitness books grow, whilst cook books decline

OPPORTUNITIES to encourage consumption:

- Flexitarian diet (currently 8% of UK consumers adopted lifestyle)
- Convenience needs changing from time saving to saving effort
- Fish 65% more likely to be chosen for ease and speed
- BBQs

BIG HITTING HEALTH CAMPAIGNS:

- London Marathon Expo – 49,000 runners
- The Running Bug – 450,000 members, 575,000 social media followers
- Women’s Health



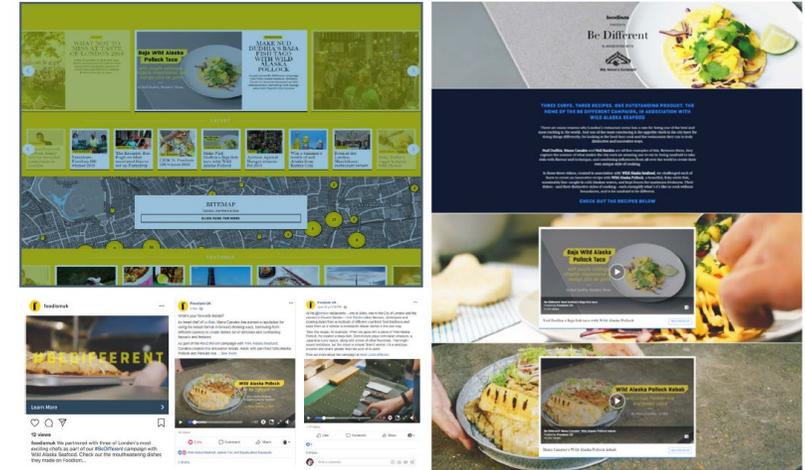
MAKE POLLOCK FAMOUS



All Hands 2017, we talked about the **premiumisation of AK pollock**.

FOODISM

- Recruited three chefs who were tasked to use AK in contemporary street-food style cooking
- Multi-channel campaign incorporating video / print / social media
- Total reach – 67,112
- Total views – 39,294



DALE PINNOCK, THE MEDICINAL CHEF

- Filmed pollock recipes
- Eat, Shop, Save



We have seen:

- Recent media articles encouraging the uptake of pollock
- First chilled pollock products in store
- Plus 32 new products using AK pollock, according to most recent shopping survey



Eat more pollock and less squid to save fish stocks, urges charity

MCS's Good Fish Guide also says unclear labelling on seafood products means shoppers should ask if their choice is sustainable

RETAIL / NEW PRODUCTS



New retail promotions:

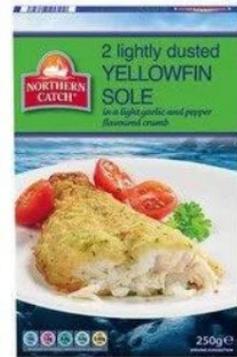
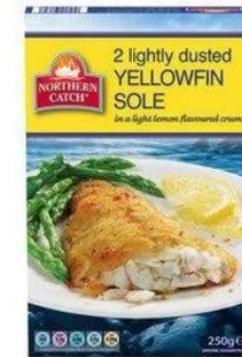
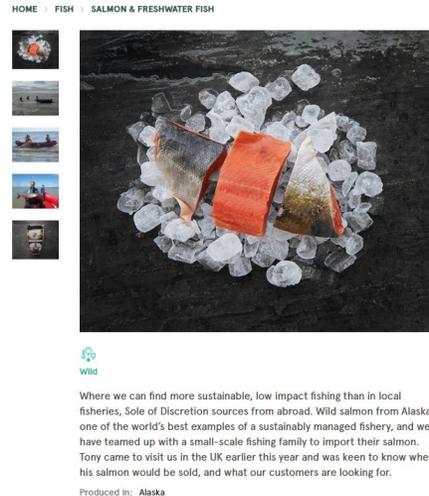
- Amazon Fresh – fresh sockeye salmon fillets
- Planet Organic – LEAP products
- Wholefoods – LEAP products
- ICA in Sweden – Hot Cod

Pipeline consumer promotions

- Farmdrop – fresh sockeye filets
- Booths – fresh sockeye filets
- Abel and Cole – fresh sockeye filets

New product development:

- Chilled AK pollock
- Salmon burgers
- Added value YFS



WHAT'S NEXT – CAMPAIGN PILLARS 2018/9



Q1: WILD

THE GAME FAIR
UCFF
WILD WEDNESDAY

Q3: HEALTH

M&S RETAIL PROMOTION
HELLO FRESH /ABEL and COLE food box campaigns
INFLUENCER CAMPAIGN

Q2: EDUCATION

DEVELOPMENT OF SEAFOOD U
LAUNCH SPONSORSHIP OF A SCHOOL CHEF WITH LACA
LIVE COLLEGE TOURS WITH THE STAFF CANTEEN
HAMPTON COURT FOOD FAIR WITH LEAP

Q4: SEASONAL PRODUCE

PUB IN THE PARK
JAN VAN AS – FISHING SEASON
WAITROSE RETAIL PROMOTION
BILLINGSGATE COOKING SCHOOL EVENT

ALWAYS ON:

- TRADE OUTREACH
- SOCIAL MEDIA
- CORPORATE STORYTELLING
- RETAIL PROMOTIONS



ALASKA SEAFOOD

PLAN FOR ATP FUNDING



ATP - NEW FUNDING PROPOSAL



REACHING NEW MARKET PLATFORMS / NEW AUDIENCES

New library of digital creative to address consumer trends that are impacting consumption of seafood.

Real scope to converse and engage younger consumers / millennials/centennials who buy products from companies who are **transparent, honest about products / business ethics / CSR.**

New creative would endorse:

- Sustainability
 - Wild and free
 - Clean waters
 - Not enhanced / tampered with
- Create a bank of new material for use as point of sale in retail, social media and for B2C and B2B campaigns.
- Build on the development of the VR, invest in footage from Alaska including pollock fishing, processing, canning, family fishing life, fishermen and women and sustainability.
- Create more quick step-by-step 'stop action' videos for social media. Food styling and influences are constantly evolving so it's about **maintaining a contemporary look** and feel that appeals to all markets.
- Invest in new photography for the marketing of non-traditional species such as dogfish and sole.
- Recommission on Alaska-themed cook book for children for distribution in major retailers throughout the UK right through to the foodservice sector with cooks in schools.
- Create new video content to promote the value to our markets. Example – Norwegian Seafood Council <https://www.youtube.com/watch?v=GAi43ChbG88>

TRENDS AND DEMOGRAPHICS

Invest in more consumer research and analysis from providers such as Mintel and Neilson.

Specific areas of interest include market intelligence on:

- Trends in fast food and hospitality
- Online food retail trends
- Market growth in food delivery boxes
- Innovation in the restaurant sector
- Foodservice analysis
- Food-to-go market reports
- Menu and food trend reports

ALASKA SEAFOOD

THANK YOU

