



Quarterly Trends Report

Q1 2021

Introduction

The goal of this report is to **monitor key trends** emerging in the food/protein space and **identify ways our partners can act on or learn from these trends**.

Each quarter we'll examine four trends on emerging food topics, analyzed through social listening, consumer research, industry trends reports and more. These learnings will **help inform GAPP projects and partnerships** and **provide useful insights** to the Wild Alaska Pollock industry about consumer behavior and sentiment.



Q1 Trends Analyzed

We have identified factors which consistently impact GAPP and its members and will analyze those three trends each quarter.

Each quarter we'll choose a new trend based on recent events or topics to ensure we're staying up to date on any new or emerging opportunities or risks.

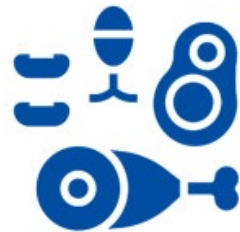
Consistently Analyzed Trends



Food Trends on Social Media

Analyzing viral food trends on social media channels such as Instagram and TikTok. We'll look at how social media is influencing consumer food habits and identify prominent food/chef influencers for potential partnerships.

We'll analyze traditional and social media conversations surrounding major food trends.



Protein Trends

Analyzing trends surrounding competitor proteins including plant-based proteins. This will help provide a broader look at food trends outside of the seafood industry.

We'll utilize industry trends reports and traditional and social media conversations for this analysis.



Sustainability in Food Industry

Analyzing recent sustainability commitments within the food industry as well as consumer interest in food sustainability.

We'll utilize industry trends reports, traditional and social media conversations as well as other companies' sustainability commitments for this trends analysis.

Q1 Trend



Lasting Impact of COVID-19

Analyzing the long-term impact COVID-19 has had on consumer food preferences and buying habits.

We'll utilize industry trends reports and traditional and social media conversations for this trends analysis.



Executive Summary

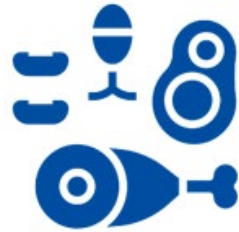


Summary of Findings



Food Trends on Social Media

1. Quick, easy-to-prepare meals are going viral on social channels like TikTok.
2. The top TikTok recipe trends include the [baked feta pasta](#) and a [charred orange](#) recipe, which became popular due to its ability to help regain the sense of taste/smell after COVID-19.
3. During the pandemic, chefs have turned to social media to share recipes while restaurants had to limit their service. This shift has driven consumer engagement with their content.



Protein Trends

1. Consumers are looking for healthier protein options driving a switch to plant-based proteins. Personal health is one of the leading drivers of protein decisions.
2. Due to the pandemic, consumers have been cooking protein at home more often, leading to a need for more versatile protein-focused dishes.
3. The barriers (health and price) consumers experience with some animal proteins can be addressed by highlighting Wild Alaska Pollock's benefits.



Sustainability in Food Industry

1. Some consumers are starting to limit the amount of meat in their diet due to environmental concerns.
2. When thinking about sustainability, consumers consider the treatment of employees, supply chain practices and CSR.
3. Two additional areas consumers are concerned about are food waste and sustainable packaging.



Lasting Impact of COVID-19

1. Due to an increased focus on wellness emerging from the COVID-19 pandemic, consumers are looking for foods that better serve their holistic health.
2. The switch to online grocery shopping during the pandemic is expected to stick around as consumers have become accustomed to the convenience.



What It All Means

1. **Post-pandemic, many consumers will continue to be focused on nutrition and wellbeing.** With consumers turning to fish for its health benefits like omega-3 and antioxidants, incorporating messaging around Wild Alaska Pollock's health benefits across communications channels (including packaging) positions WAP to be a preferred protein choice.
2. 65% of consumers look for products that can help them live a more sustainable and socially responsible life, with 47% willing to pay more for sustainable products. **Continuing to promote Wild Alaska Pollock's sustainability story** through all communications channels, including packaging, will be increasingly important in reaching this target.
3. Consumers have transitioned to cooking more from home and have **turned to social media to find easy-to-make recipes.** Promoting simple recipes and/or short recipe demo videos will continue to inspire consumers with healthy, easy and versatile Wild Alaska Pollock recipes.
4. Almost half of consumers **continue to shop more online**, indicating a long-term shift in grocery shopping habits. It will be important to remain top of mind to consumers shopping online by **highlighting diverse options from fresh to frozen.** Quality is an important factor in purchase decision, and communicating the quality, versatility and convenience of Wild Alaska Pollock (both fresh and frozen) continues to be important.



Trends Deep Dive



Food Trends in Social Media



Food Trends on Social Media



Social vs. Traditional Media

As they transitioned into cooking from home during the pandemic, consumers have **turned to social media to find easy-to-make recipes**. In the process of finding recipes, **social media has become a mecca** for these simple recipes, with many posts linking to full recipes online.

Opportunities:

1. **Increase presence on social media.** As consumers turn to social media for recipes, it is important that recipes with Wild Alaska Pollock can be found on social media.
2. **Provide easy recipes.** As consumers search social media for easy recipes, focus on the convenience of cooking with Wild Alaska Pollock.



Engaging Trends

Short-form videos from chefs have become extremely popular on video sharing platforms, including TikTok, where consumers can save recipes to revisit later.

Opportunities:

1. **Create short-form recipe videos.** Utilize social media accounts, including TikTok, to share short-form video recipes that consumers can save and share on their profiles, increasing the chances of having a recipe go viral.
2. **Engage and partner with chefs.** Partner with social media savvy chefs to share recipes with Wild Alaska Pollock. Utilize the chefs built-in following to educate consumers on how to make hassle-free meals at home.



Consumers have turned to social media for easy recipes.

During the pandemic, consumers have turned to social media to find easy recipes they can make from their homes. Their search has led recipe videos to go viral on TikTok and has created frenzies that carry over into traditional media too.



In January 2021, a recipe for baked **feta pasta** went viral on TikTok and has some outlets claiming a **shortage on feta cheese** in stores.

This recipe **has more than 26k mentions** on both social and traditional media in the past month.



Earlier this year, a student shared a Jamaican recipe for a **charred orange with brown sugar** that is said to **restore taste after COVID-19**.

This trick **has more than 200 mentions** on both social and traditional media in the past month.

EatingWell

This TikTok Trend for Baked Feta and Cherry Tomato Pasta May Be the Tastiest One Yet

VOGUE

What Makes a Food Go Viral? Inside the Explosive Popularity of TikTok's Feta Pasta

yahoo!/life

Did a viral pasta recipe really cause a feta cheese shortage?

SHAPE

TikTok Swears This Remedy Helps You Regain Taste and Smell After COVID-19 — But Is It Legit?

All you need is an orange, an open flame, and some brown sugar.

BuzzFeed News

This Student Shared His Mom's Childhood Recipe That Helped Him Regain His Sense Of Taste After COVID-19 And Now Thousands Have Tried It

Chefs are bringing their skills to social platforms.

- At the start of the pandemic, many restaurants closed their doors to the public, leaving chefs out of work. Chefs across the country have **turned to social media to sell meals, share recipes, and to remain active in their communities after restaurant dining declined.**
- Chefs, such as [Tida Pichakron](#) at Haute Sweets in Dallas, have started using social platforms to **show their customers how they prepare meals and the ingredients they use.**
 - [Momo Shack](#), a Himalayan Dumplings shop, also uses Instagram to connect with their customers and teach them how to make momos, Nepali dumplings usually filled with meat and vegetables. Since the pandemic, Momo Shack has been focusing their attention on frozen momos customers can fry at home and share detailed posts on their Instagram about the recipes.

Popular TikTok Chefs	TikTok Followers	Example Post
Adam Witt @omnivorousadam	454.5K	Homemade Corned Beef
Maggie Johnson @magsmeals	292.3K	Baked Oats
Vivian Aronson @cookingbomb	1.6M	Stir Fry
Eitan Bernath @eitan	1.6M	Giant Burger

DALLAS
Observer
Chefs Lean into Social Media During the Pandemic and Find There's More to Share than Food

The New York Times
Cooks Turned Instagram Into the World's Greatest Takeout Menu
During the pandemic, entrepreneurial chefs have reshaped food culture across the country with tiny, homegrown pop-ups that thrive on social media.

EATER
PORTLAND, OR
No Restaurant? No Problem: Chefs Have Found a Certain Freedom in Selling Meals on Instagram.
Chefs and home cooks looking for a financial boost and creative outlet during the pandemic turn to the online platform



Protein Trends



Protein Trends



Increase in At-Home Protein Consumption

After the pandemic limited the service of restaurants, **consumers turned to retail grocers** to purchase their protein, which led to a 16.8% gain across all three protein categories: poultry, red meat and seafood.

Opportunities:

1. **Increase retail opportunities.** As consumers continue to seek options outside of sit-down restaurants, look for opportunities at retail to highlight Wild Alaska Pollock as a versatile ingredient that can be used while cooking.



Health Benefits

Two in five consumers say healthfulness is important to them when purchasing animal-based proteins while nearly half of consumers buy fish or shellfish for **health benefits like omega-3 and antioxidants**. That being said, only one-third of consumers purchase fish/seafood because they believe it to be healthier than other animal-based proteins.

Opportunities:

1. **Differentiate from typical animal proteins.** There's an opportunity to educate consumers on the health benefits of Wild Alaska Pollock. On packaging and in communications, highlight the differentiating health benefits of Wild Alaska Pollock such as its high protein and low calorie count.



Plant-based Protein

Plant-based alternatives are **giving consumers new options** that offer different wellness benefits. While the conversation around plant-based proteins has grown, there are still barriers to get consumers to try it, including consumers' unwillingness to change their diets and the expense of plant-based options.

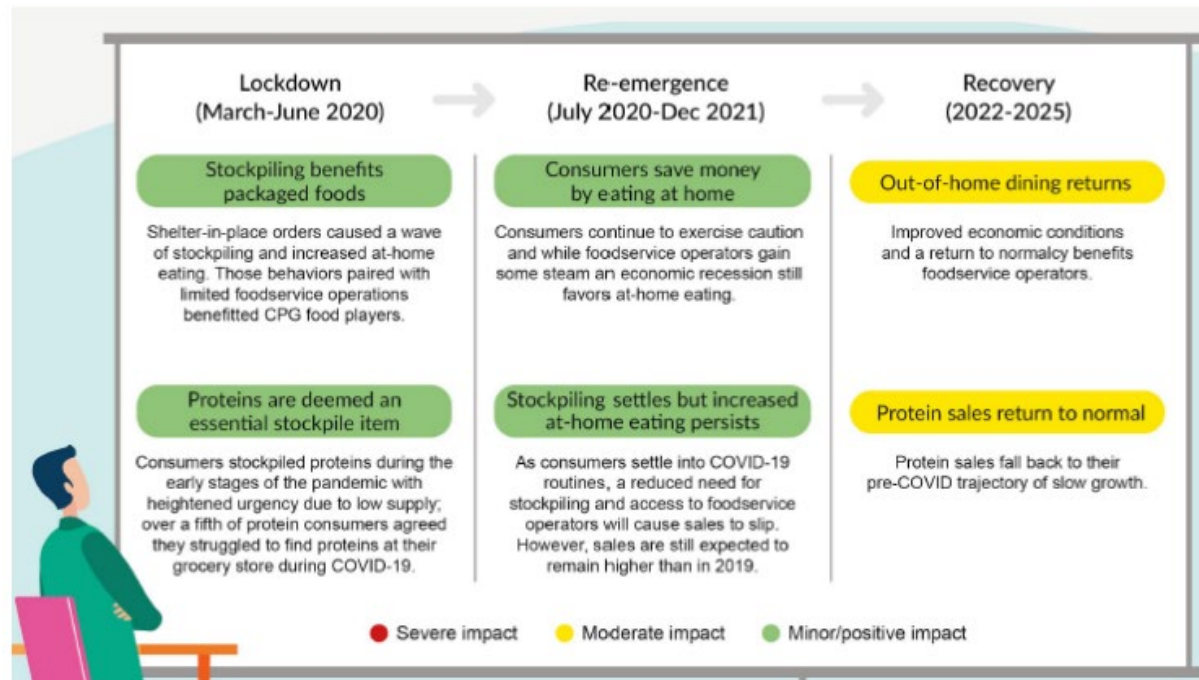
Opportunities:

1. **Affordable health.** As consumers look for options and variance in their proteins, highlight the healthful while also affordable benefits of Wild Alaska Pollock. This will help it compete with plant-based options which are often seen as too expensive.



COVID-19 caused a surge in protein purchase among consumers but is expected to return to normal.

FIGURE 3: SHORT-, MEDIUM- AND LONG-TERM IMPACT OF COVID-19 ON ANIMAL PROTEIN, JULY 2020



Source: Mintel

- The historically slow-growing proteins market saw a COVID-19-inflicted sales spike in 2020 as consumers shifted a large share of food and protein dollars to retail grocers due to operational limitations of the foodservice industry.
 - This shift triggered 16.8% gains for the collective market, benefiting all three protein categories: poultry, red meat and seafood.
- **Uncertain financial times are expected to keep consumers in flux** with their protein purchasing habits, interchanging protein types to accommodate for price increases and the potential of continued shortages.
 - There is opportunity to introduce Wild Alaska Pollock into consumers' home cooking routines as they're looking to differentiate their meal rotation.



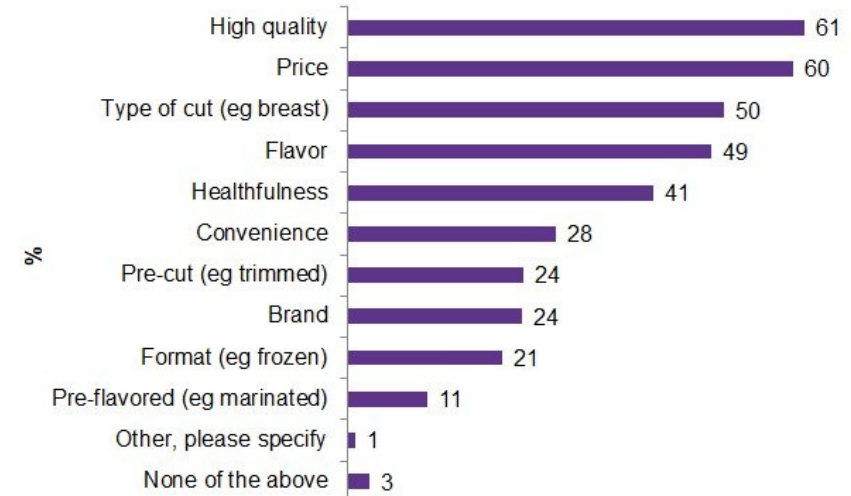
Fish has a reputation for being a healthy protein, though there's opportunity to position it as a healthier option over other animal proteins.

- Nearly half of consumers buy fish or shellfish for health benefits like **omega-3** and **antioxidants**, and consumers note overwhelmingly that fish is a good source of **protein**.
- However, only **35%** of consumers buy fish and shellfish because they believe it to be healthier than other animal proteins.
- More than one third of consumers are consuming animal proteins for its **healthfulness** (i.e., high protein source, low fat, low sodium, etc.), creating opportunities for protein manufacturers to advertise their protein's health benefits.

Figure 5: protein attributes, October 2020

Base: 1,916 internet users aged 18+ who have eaten some form of animal protein in the past six months

"What is important to you when choosing an animal-based protein? Please select all that apply."



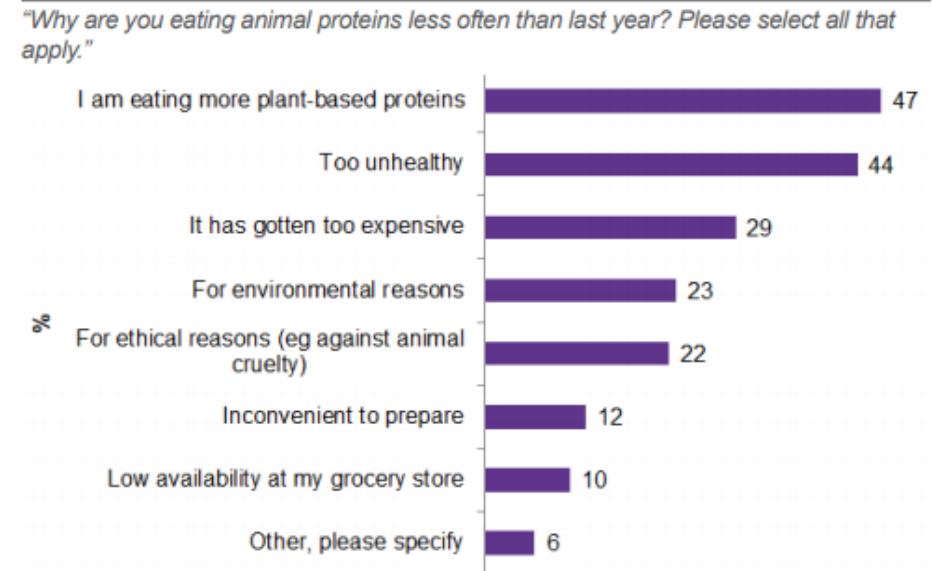
Source: Lightspeed/Mintel



Many of the reasons for decreased animal protein consumptions are areas of strength for Wild Alaska Pollock, including health and expense.

- Not all protein types are created equally, and as a result, health is a leading factor for decreased consumption of animal protein. Widespread plant-based innovations are also being accepted.
 - Health benefits differentiate meat proteins, such as beef or pork, from fish proteins. While both have their place in a healthy diet, cutting down on red meat and increasing fish consumption may vastly improve consumers' health.
- Online conversations about plant-based proteins are dominated by themes of wellness, and, although among a smaller base, 47% of those eating fewer animal proteins are opting for plant-based alternatives instead.
 - Price volatility among animal proteins and the potential for more shortages while the pandemic is still uncontrolled further supports increased consumer trial of plant-based option.

FIGURE 4: REASONS FOR DECREASED CONSUMPTION, OCTOBER 2020



Base: 217 internet users aged 18+ who have eaten less animal protein in the last year

Source: Lightspeed/Mintel



Sustainability in Food Industry



Sustainability Trends



Companies that Care

More than ever, consumers, especially those who are younger, want to buy **from companies that commit to causes** with their words *and* their actions. To be sustainable, companies should consider **social, environmental, and economic** justice.

Opportunities:

1. **Focus on people:** Showcase Wild Alaska Pollock producers and tell the stories of the faces behind the product.
2. **Think green:** Feature Wild Alaska Pollock as an eco-friendly protein and low carbon alternative to traditional animal proteins.



Fighting Food Waste

Nearly 90% of consumers already try to **reduce food waste** in their own homes, but it remains a nationwide issue. Americans **throw out \$161 billion of food** each year.

Opportunities:

1. **Engage with Wild Alaska Pollock producers:** Find ways to showcase that GAPP is "walking the walk" where Wild Alaska Pollock is produced.
2. **Zero-waste recipes:** Promote recipes on social that facilitate zero-waste practices.



Reducing Plastic Packaging

The days of single-use plastics are over, especially considering their impact on marine life. 74% of consumers are willing to **pay more for sustainable packaging**.

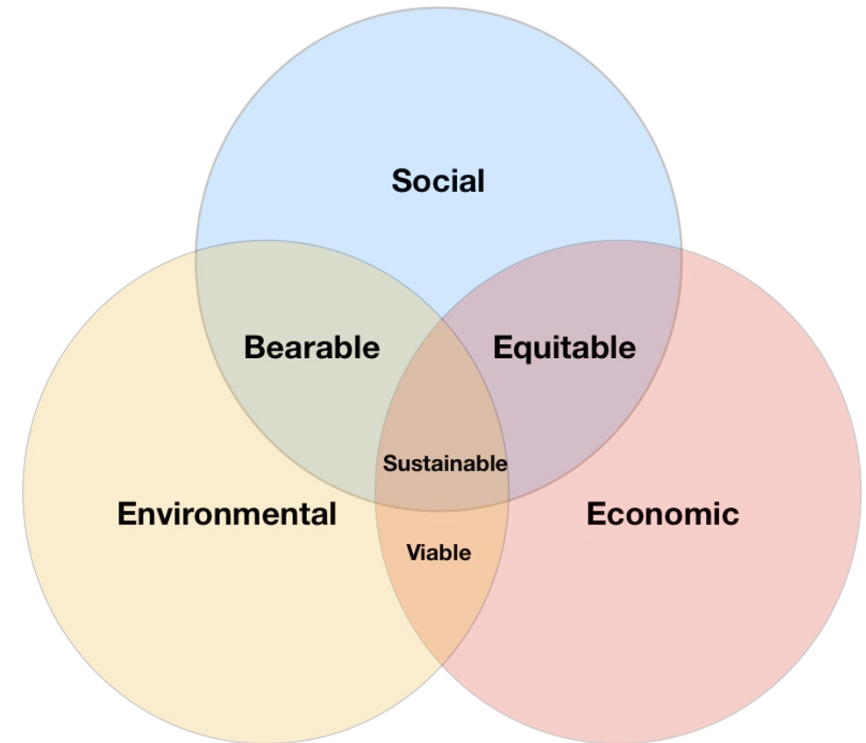
Opportunities:

1. **Focus on packaging:** Highlight ways that Wild Alaska Pollock is either reducing packaging or using recyclable/compostable packaging options.



Sustainability is more than just environmental.

- 65% of consumers look for products that can help them live a **more sustainable and socially responsible** life
- 60% of consumers buy products and services from companies that are **socially and/or environmentally responsible**
- 54% of consumers try to purchase products or services from brands that **take a stand on social or environmental issues**
- 47% of consumers are **willing to pay more for sustainable products** → 35% are **willing to pay up to 25% more**
- On top of environmental issues, companies must consider **social and health issues**, including workers' rights, racial justice, etc.
- **Eco-labels** (such as USDA Organic, Non-GMO Project Verified, etc.) are appealing to consumers and drive sales



Food waste is a major concern for Americans.

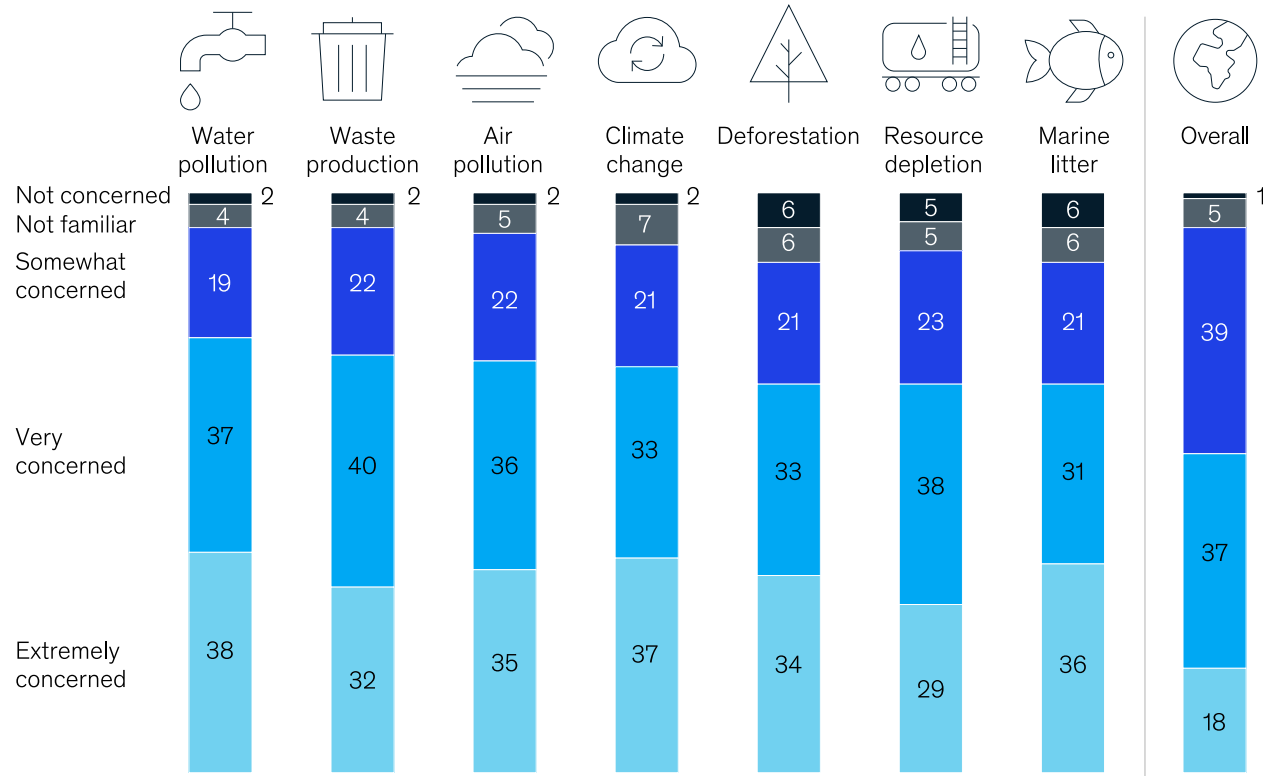
- Food waste contributes **7% of global greenhouse gas emissions** annually
- Americans throw out **8 billion pounds** of food each year, which accounts for over **\$161 billion**
 - **80%** of American food waste is the result of **misunderstanding expiration labels**
- **88% of Americans** currently take steps to **reduce food waste** in their own homes
- Reducing waste addresses all facets of sustainability → **environmental, economic, and social**
- The **government is on board** with reducing food waste → in 2015, the **USDA and the EPA** set a goal to cut food waste by half by 2030
 - The initiative even has a priority area to **“Collaborate with Private Industry to Reduce Food Loss and Waste Across the Supply Chain”**



Reducing plastics and packaging.

Consumers' concerns about the environmental impact of packaging are spread almost equally among a number of factors.

Concern over environmental impact of product packaging,¹% of respondents



- Consumers care about the **environmental impact of packaging** across product types, especially for foods
- Consumers care most about the impact of packaging on **water pollution and waste production**



Lasting Impact of COVID-19



COVID-19 Driven 2021 Food Trends



Feed the Mind

Innovative food and drink formulations will be accepted as solutions for mental and emotional wellbeing. New formulations will help people learn how diet can impact mental and emotional health, which will lead to new interest in psychology-based approaches to healthy eating.

Opportunities:

1. **Offer moments of comfort & support** through product rituals. Functional food & drinks that offer mental & emotional health benefits will expand.
2. **Enhance experiences and encourage healthy eating.** As more people adopt psychological approaches to healthy eating, "mindful" and "nutrient dense" will become buzzwords.



Quality Redefined

Food and drink brands will be challenged to respond to newly altered views of trust, quality and what is essential. As life gets busier and spending rebounds, companies will need to reinvent convenience, create safe retail experiences and deliver responsible budget items.

Opportunities:

1. **Find new advantages in at-home living.** Brands & retailers can shake up home routines with budget-friendly inspiration & adventurous flavors.
2. **Revive and reinvigorate old priorities.** Consumers will demand responsible business practices and lessons learned from the pandemic to be implemented in future practices.
3. **Invest in a seamless and equitable future.** Advancements in technology will drive the expansion of seamless online/offline retail experiences. Meanwhile, future-focused companies will fuel equitable access to healthy food.



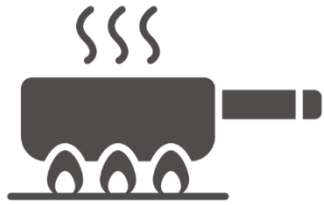
United by Food

Food and drink brands can balance a person's need to feel unique and special with the desire to be part of a community of like-minded individuals. Brands will explore how they can be used as indicators of identity, and eventually find ways to connect and mobilize their fans.

Opportunities:

1. **Celebrate individuals' unique passions** by connecting with & supporting people who are using food & drink to express facets of their personalities.
2. **Create community around common interests** by providing consumers with new ways to socialize and meet new people.
3. **Mobilize consumers to do good** by helping consumers become part of the change they want to see in the world.

Consumers gained confidence in the kitchen during the pandemic and intend to continue cooking well after it is over.



As of December 2020, **51%** of Americans **continue to cook more** than they did at the same time last year.

71% of those who are cooking more intend to **continue doing so after the pandemic ends**.



Those cooking more at home also **report increased confidence in their abilities (50%)** while another quarter of consumers say they **are learning more and building greater confidence**.

Half of Americans report branching out to **try new ingredients (47%)**, brands and products (52%).



Those who are cooking more say they **find enjoyment in cooking (81%)** and 51% claim they **enjoy the activity now more than ever before**.

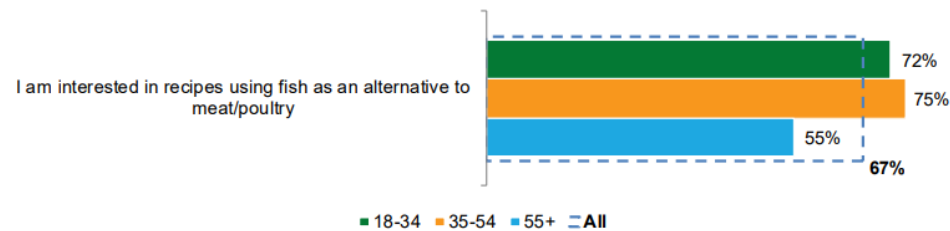
45% of consumers report **eating together more as a family**, with that number climbing to 55% among households with kids.

Consumers will be more focused on their wellbeing post pandemic.

- Post-pandemic, many consumers will continue to be focused on nutrition and wellbeing. The healthy reputation of fish and shellfish leaves the category well positioned to meet this need.
 - 54% of all consumers, and 63% of those 50+, care more about the healthfulness of their food and beverage choices in 2020 than did in 2010; healthfulness is the biggest mover, more so than taste and price.
- Fish can play into consumers' increased interest in their health & wellbeing, though consumers are looking for more versatility in how they cook with fish. There's opportunity for fish brands to position themselves as key components of more mealtimes via recommendations on social or through on-pack recipe suggestions.

FIGURE 3: FISH AS A MEAT/POULTRY ALTERNATIVE IN RECIPES, ANY AGREE, DECEMBER 2020

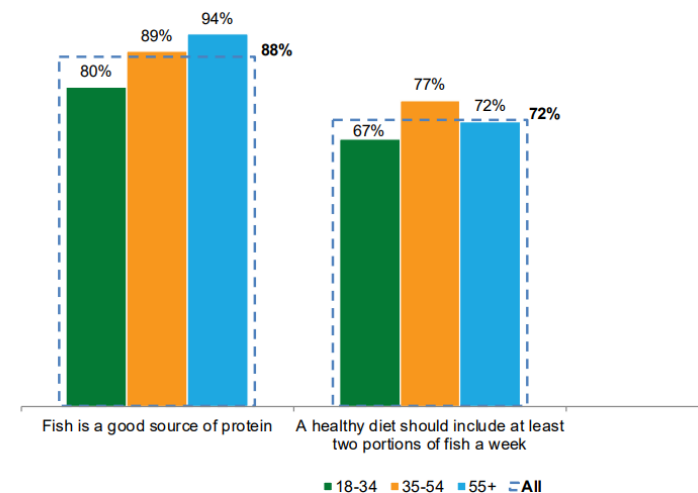
"How much do you agree or disagree with the following statements?" – NET – Agree



Base: 1,595 internet users aged 18+ who purchased fish or shellfish from a grocery/retail store in the past three months

Source: Lightspeed/Mintel

FIGURE 5: HEALTHY DIETS AND FISH, ANY AGREE, BY AGE, DECEMBER 2020

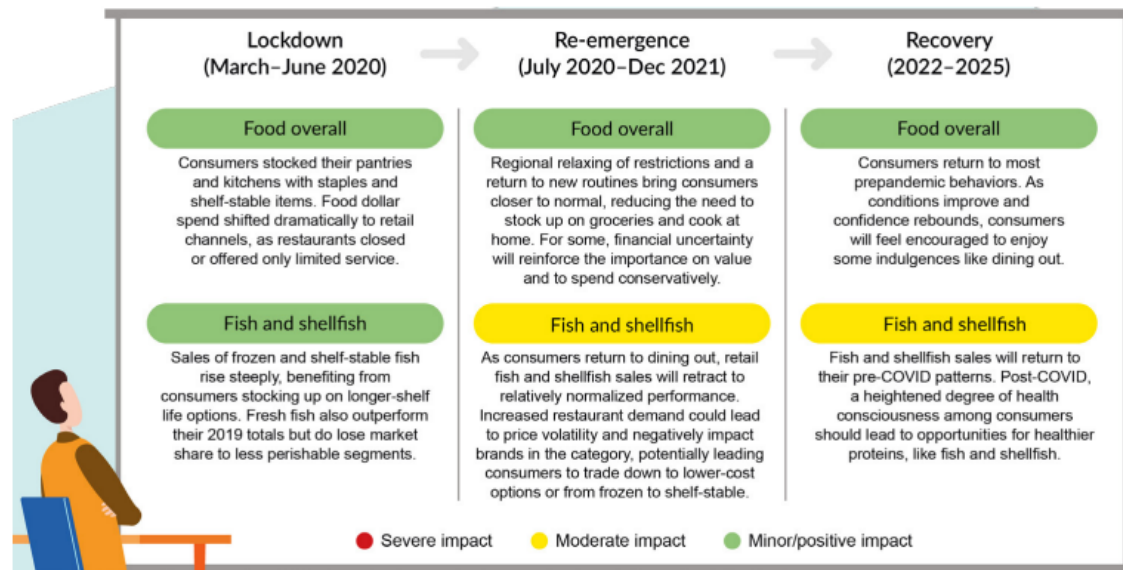


Source: Lightspeed/Mintel



Online grocery shopping is here to stay, which could inspire a more long-term increase in frozen and shelf-stable fish purchases.

FIGURE 2: SHORT, MEDIUM AND LONG TERM IMPACT OF COVID-19 ON FISH AND SHELLFISH, FEBRUARY 2021



Source: Mintel

- As of the beginning of January, **half (49%) of consumers continued to shop more online** due to the pandemic, indicating a longer-term shift in grocery spend.
 - This shift to online grocery shopping could inspire shifts in product choice from fresh to frozen and shelf-stable.
- Despite this increased interest in frozen fish, there's still concern about the quality of it. Nearly **six in 10 consumers** and nearly **two-thirds of parents** are **concerned about the quality of frozen fish**.



Cultural Trends Surrounding Fish



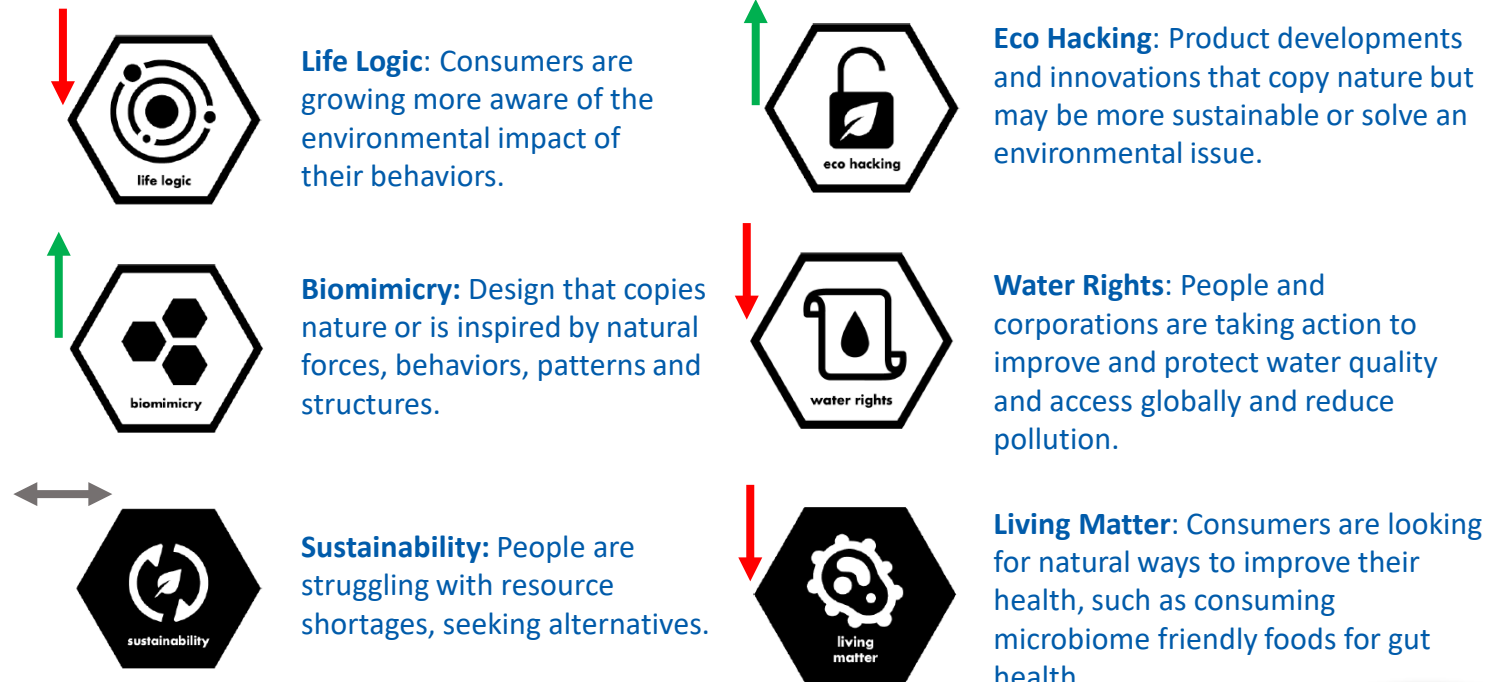
Cultural Trends Surrounding Fish

The common thread through the cultural trends surrounding fish is **sustainability**. The biggest trends include consumers' awareness of the **environmental impact of their behaviors, product developments & innovations** to drive sustainability, companies taking action to **improve and protect water quality** and general interest in sustainability. Consumer health is also a cultural trend, with consumers looking for **natural ways to improve their health**.



Cultural trends help understand *why* a topic is trending and the cultural landscape of a consumer behavior, such as snacking or trust.

Biomimicry and **eco hacking** are predicted to **grow in cultural relevance**. We recommend continuing to keep these cultural elements in mind as you develop programs and communications.



NOTE: Colored arrows indicate how the cultural trend is predicted to grow in the next year (green=increase, red=decrease, grey=no significant change)



White Space

Wild Alaska Pollock should lean into:

- Sustainability messaging
 - **“Sustainability”** is an element that is big in the general fish category, showing broader cultural relevance.
- Nostalgic recipes/foods utilizing Wild Alaska Pollock
 - Connecting to **“provenance”** which is about people preserving and celebrating their history & heritage.
- Recipes/foods that promote **“clean eating”**
- Versatile ways to use Wild Alaska Pollock that help reduce food waste to showcase **“waste positive”** relevance.

Competitive cultural elements include:

- Product innovations to meet consumer demand for products that still feel naturally made- **“biomimicry”**.
- Innovations to drive more sustainably sourced products in support of **“eco hacking”**.
- Other elements more ownable by competitors include:
 - Consumers’ search for more natural health remedies, as shown by the presence of **“living matter”**.
 - An interest into the science behind their food, as shown by the presence of **“nano”**.

Top 5 Elements Driving Cultural Relevancy & Conversation for Fish Industry, Wild Alaska Pollock and Competitors



Appendix



Examples of Trends in Traditional Media



Trends in Traditional Media



Sample Conversation of Food Trends on Social

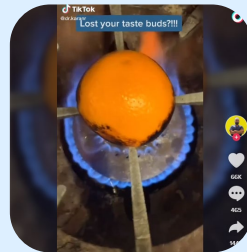
Top social trends included viral TikTok recipes such as the Feta Pasta and Charred Orange tip and chefs taking to social media to share recipes and connect with their followers.

What Makes a Food Go Viral? Inside the Explosive Popularity of TikTok's Feta Pasta ([Vogue](#))



Cooks Turned Instagram Into the World's Greatest Takeout Menu ([NYTimes](#))

This Student Shared His Mom's Childhood Recipe That Helped Him Regain His Sense Of Taste After COVID-19 And Now Thousands Have Tried It ([BuzzFeed](#))



Five viral TikTok recipes to try at home ([Vox](#))



Sample Conversation of Protein Trends

Top trends primarily highlighted consumer perception of proteins and the differences between plant and animal proteins.

Top eight alternative protein trends to watch in 2021 ([Good Food Institute](#))



Animal vs. Plant Protein — What's the Difference? ([Healthline](#))

Animal protein, ocean-based protein or plant-based protein – which is better? Let's break down the science. ([Advance International](#))



5 Surprising Benefits of Plant-based Protein and 3 Amazing Vegan Smoothie Recipes ([Mid-Day](#))



Trends in Traditional Media



Sample Conversation of Sustainability in Food Industry

Top sustainability trends in the food industry focus on showing consumers how what they choose to purchase and eat can make a real impact on the world.

Raising the steaks: First 3-D-printed rib-eye is unveiled ([Washington Post](#))



NFL donates unused food from Super Bowl LV to families in need ([ABC Action News](#))

Invasive Asian carp is getting a new name and a public makeover to draw more eaters ([USA Today](#))



Bill Gates says rich countries should be eating 100% synthetic beef ([Daily Wire](#))



Sample Conversation of the Lasting Impact of COVID-19

The top lasting trends following the COVID-19 pandemic include consumers' focus on the role food plays in health/wellbeing, online grocery shopping and moving forward with new habits vs. trying to get back to "normal".

Shoppers have changed how they're choosing their foods...reading labels, understanding what ingredients are in their foods, where their foods come from and which foods they should avoid ([Forbes](#))



Online Grocery Shopping Will Continue Post-COVID Says Data From Online Grocer Good Eggs ([Forbes](#))

The pandemic has made more people interested in foods that benefit their immunity, metabolism and mental state, as well as solidified the plant-based sector ([FoodDive](#))



The prolonged shutdown, by throwing us off-kilter, may help us reimagine our futures ([TIME](#))





Thank you!

