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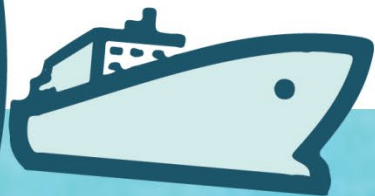
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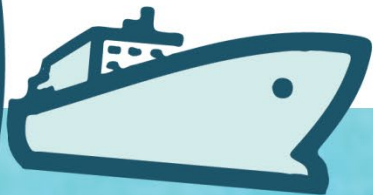


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Supporting Sponsors





Opening Remarks

Bob Desautel, CEO of Global Seas

Chairman of GAPP Board of Directors



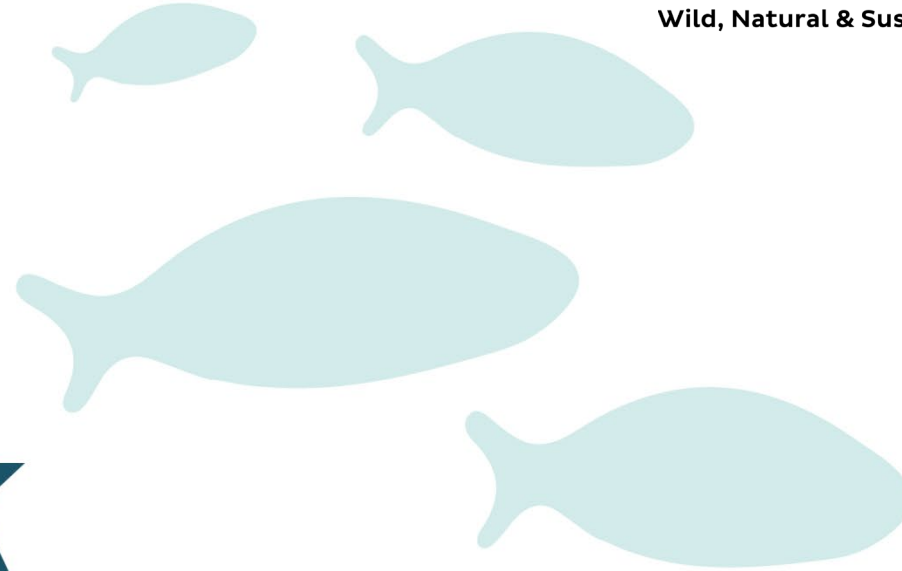
The Association of Genuine
Alaska Pollock Producers
2022

GLOBAL SEAS



Wild, Natural & Sustainable®

Wild Alaska Pollock



ANNUAL MEETING

Strategically Building Awareness and Demand for the Perfect Protein



Thank you GAPP Board of Directors!



Thank you Associate Members



Sea. Taste. Enjoy!



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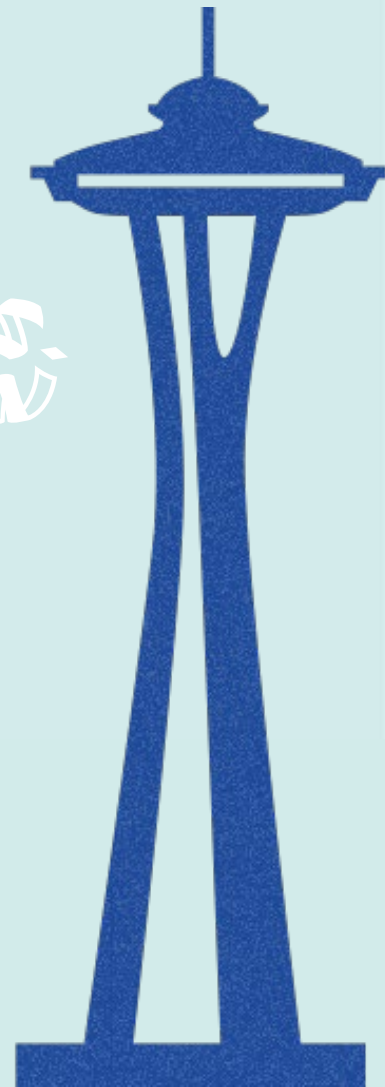


Wild, Natural & Sustainable®





MEMBER DINNER



DAY-AT-A-GLANCE

8:00am: Opening Remarks: Bob Desautel, GAPP Chair

8:10am: Welcome Video Remarks, Senator Sullivan, Senator Murkowski

8:15am: The Importance of Industry Relationships and Common Goals, Jon Kurland, Regional Administrator, Alaska Regional Office
(Brought to you by Global Seafood Alliance)

8:25am: GAPP State of the State: Craig Morris, GAPP CEO

8:35am: Food Trends that Matter to Wild Alaska Pollock, Amanda Buckle, Managing Editor, *Seafood News & Urner Barry's Reporter*

8:55am: Wild Alaska Pollock Fishery Update: Ron Rogness, GAPP Consultant; Jana Dombrowski, Wells Fargo *(Brought to you by American Seafoods)*

9:40am: Perfection in Plain Sight: Selling Surimi Seafood to Health Professionals, Chris Rich, Vice President, Eat Well Global

Break—15 minutes [10:00-10:15am]

10:15am: North to Alaska with Holland America, Kacy Cole, Holland America; Megan Rider, Alaska Seafood Marketing Institute, Susan Marks, Alaska Seafood Marketing Institute

10:40am: The Power of Influence(rs), Melissa Kinch, Partner, Ketchum; Deborah Henderson, Managing Account Supervisor, Ketchum

11:05pm: From 'Top Chef' to the Top Fish, Chef Antonia Lofaso

(Brought to you by Global Seas)

Lunch [11:50 – 1:00pm]

1:05pm: Welcome back from Lunch: Port of Seattle Commission President Ryan Calkins

1:15pm: Gimme that Filet-o-Fish, Jason Cervone, McDonalds U.S.; Craig Morris, GAPP

1:35pm: Update on Typhoon Merbok; Elizabeth Miller, The Alaska Community Foundation

1:45pm: What do Americans Think about Wild Alaska Pollock: Mary Elizabeth Germaine, Partner, Global Head of Analytics, Ketchum; Lauren Hasse, Director Analytics, Ketchum *(Brought to you by Trident)*

2:25pm: How Alaska Airlines is Reaching New Heights, Kevin Lemme, GM Airline Planning and Network Performance *(Brought to you by Port of Seattle)*

Break—15 minutes [2:45 – 3:00pm]

3:00pm: New Partnerships Charting New Territories, Christine Durkin, GAPP Consultant

3:10pm: We Get By with a Little Help from Our Friends (in Retail and Foodservice), Chef Matt, Nordstrom; Jake Holbrook, Gorton's; Analise Gonzales, Trident Seafood; Marcus Lalario, Lil Woody's; Jay Gordon, Arby's; Amanda Buckle, Seafood News & Urner Barry's Reporter *(Brought to you by Alaska Seafood Marketing Institute)*

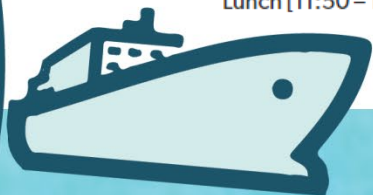
4:10pm Wild Alaska Pollock Then and Now, Jim Johnson, Doug Christensen, Wally Pereyra, Bob Desautel & Special Guest

4:50: Closing Remarks & Presentation of Top Hand Award, Craig Morris, GAPP CEO

5:00pm: Reception

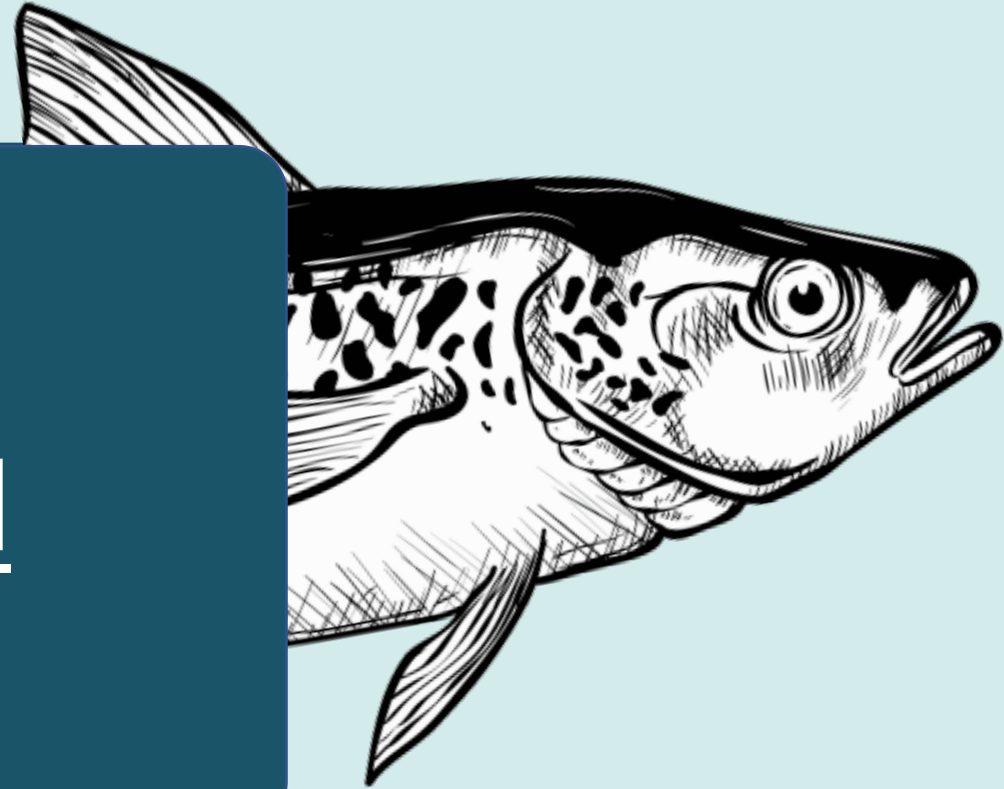


**LOTS TO
LOOK
FORWARD
TO!**



GAPP's mission is simple...

**to build awareness
and demand for Wild
Alaska Pollock.**

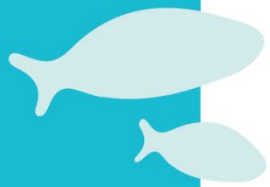




THANK YOU

**PLEASE SILENCE
YOUR PHONE**





GET SOCIAL

WITH

#GAPPAM2022



- **Twitter:** @wildakpollock
- **Instagram:** @wildakpollock
- **Facebook:** Genuine Alaska Pollock Producers
- **LinkedIn:** Genuine Alaska Pollock Producers



GET CREATIVE

#TEAMWILDALASKAPOLLOCK

#GAPPAM2022

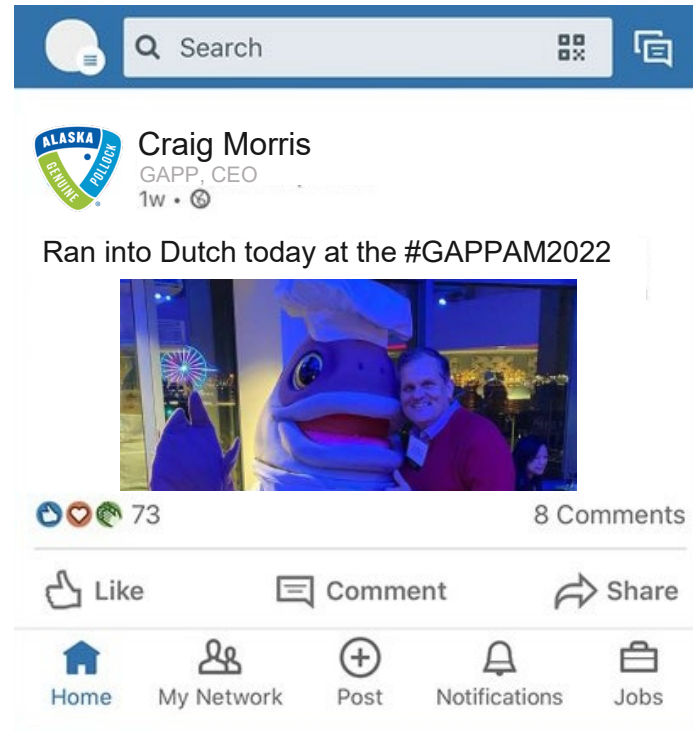
#CLIMATEFRIENDLYPOLLOCK



I can't wait to hear the Year-Over-Year Study Results and the Then and Now Panel!

#GAPPAM2022

Everyone can reply





WIFI

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MARKET PRICES, NEWS, AND ANALYSIS



Need important details such as the program, agenda, speaker information, feedback surveys and more?

SCAN THE QR CODE ON THE FRONT OF YOUR NAME BADGE

The Association of Genuine Alaska Pollock Producers
2022
Wild Alaska Pollock ANNUAL MEETING
Strategically Building Awareness and Demand for the Perfect Protein

#GAPPAM2022

CRAIG MORRIS GAPP



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OCTOBER 17TH, 2022

SEATTLE, WA
THE WESTIN SEATTLE



ALASKA GENUINE POLLOCK
ALASKA SEAFOOD GLOBAL SEAS
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on the front for the program agenda, speaker information, and feedback surveys, or visit alaskapollock.org/am-2022

Have Questions? info@alaskapollock.org

#GAPPAM2022

GET SOCIAL!
Share your photos, quotes, impressions of the day and of course your @AKPollockDutch selfies with us!

OCTOBER 17TH, 2022

SEATTLE, WA

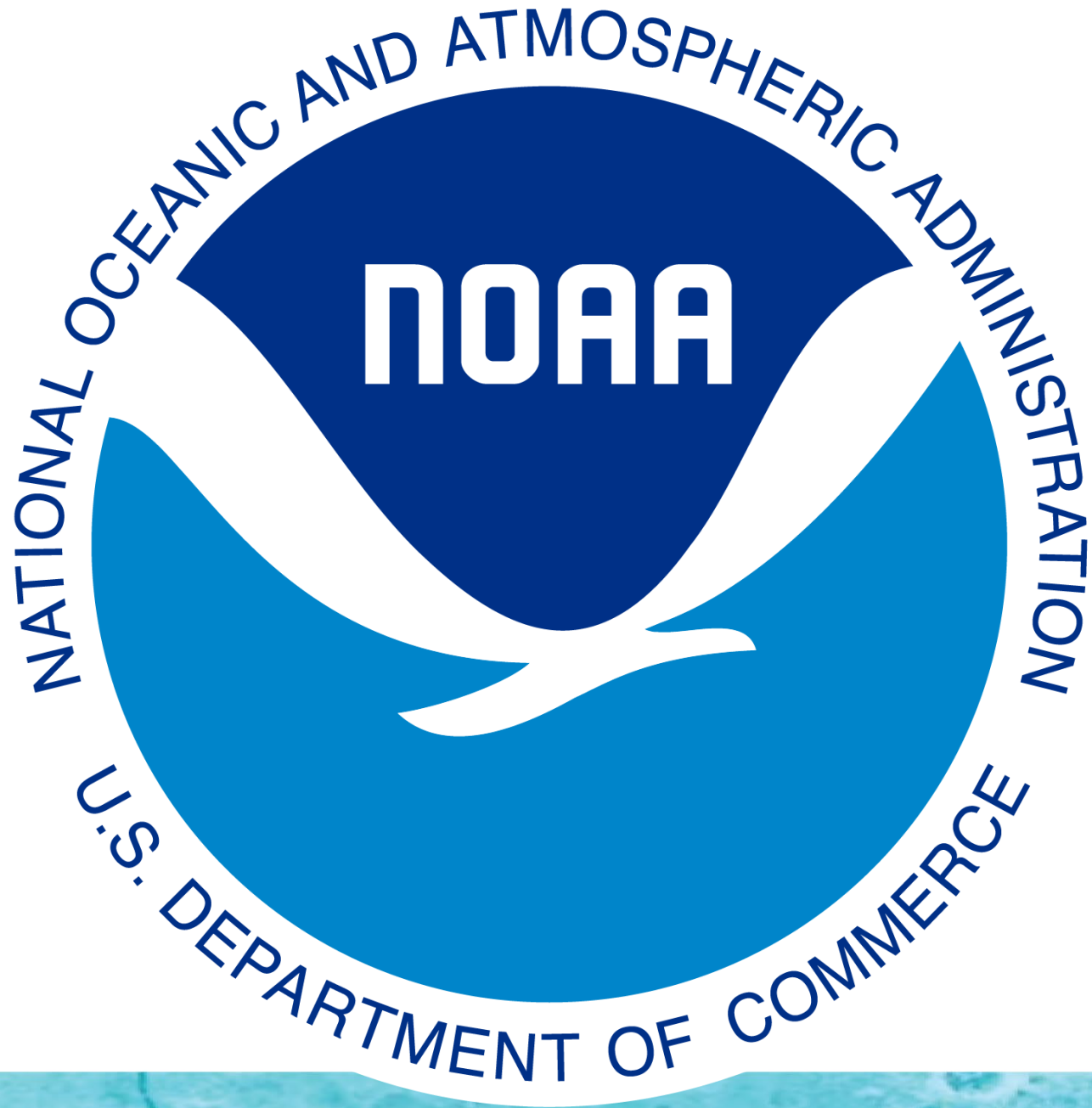




Welcome Remarks

Senator Dan Sullivan and Senator Lisa Murkowski





Brought to you by



The Importance of Industry Relationships and Common Goals

Jon Kurland, Regional Administrator





**NOAA
FISHERIES**

Our Common Goal: Sustainable Fisheries



Jon Kurland
Alaska Regional Administrator
NOAA / National Marine Fisheries Service

Wild Alaska Pollock
Fourth Annual Meeting
October 17, 2022
Seattle, Washington

My recent visit to Kodiak and Dutch Harbor with NOAA Assistant Administrator for Fisheries Janet Coit



NOAA
FISHERIES

Wild Alaska Pollock Fishery

2022 Total Harvest of Pollock:

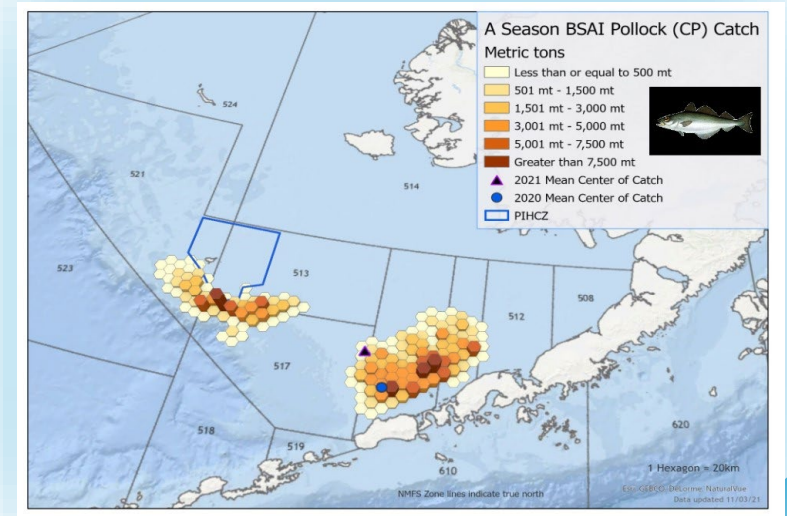
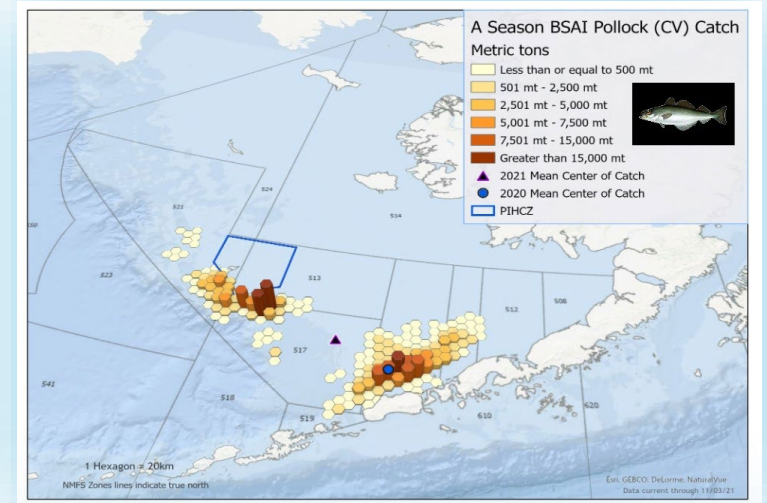
Bering Sea - 1,059,622 mt (99.8% of TAC)

Gulf of Alaska* - 116,195 mt (90% of TAC)

**fishing not yet complete for year*

Importance to the Nation

- Largest U.S. fishery by volume
- Pollock accounts for over 1/3 of all landings in the U.S.
- Provides ~30,000 jobs across the U.S.
- Recognized worldwide as being well-managed and sustainable



In-season Management to Help Achieve Optimum Yield

Bering Sea - American Fisheries Act (AFA) and Community Development Quota (CDQ) fisheries are catch share fisheries and NOAA supports the industry in managing cooperative quotas.

Gulf of Alaska - NOAA opens and closes fisheries consistent with regulations.

NOAA's in-season management team communicates target catch rates, Prohibited Species Catch rates, and other information that allows for precise management, and reallocates pollock to achieve optimum yield.

- Aleutian Islands to Bering Sea
- Incidental Catch allowance to the directed fishing allowance



At-Sea Scale, Video Approvals, and Catch Monitoring Plans

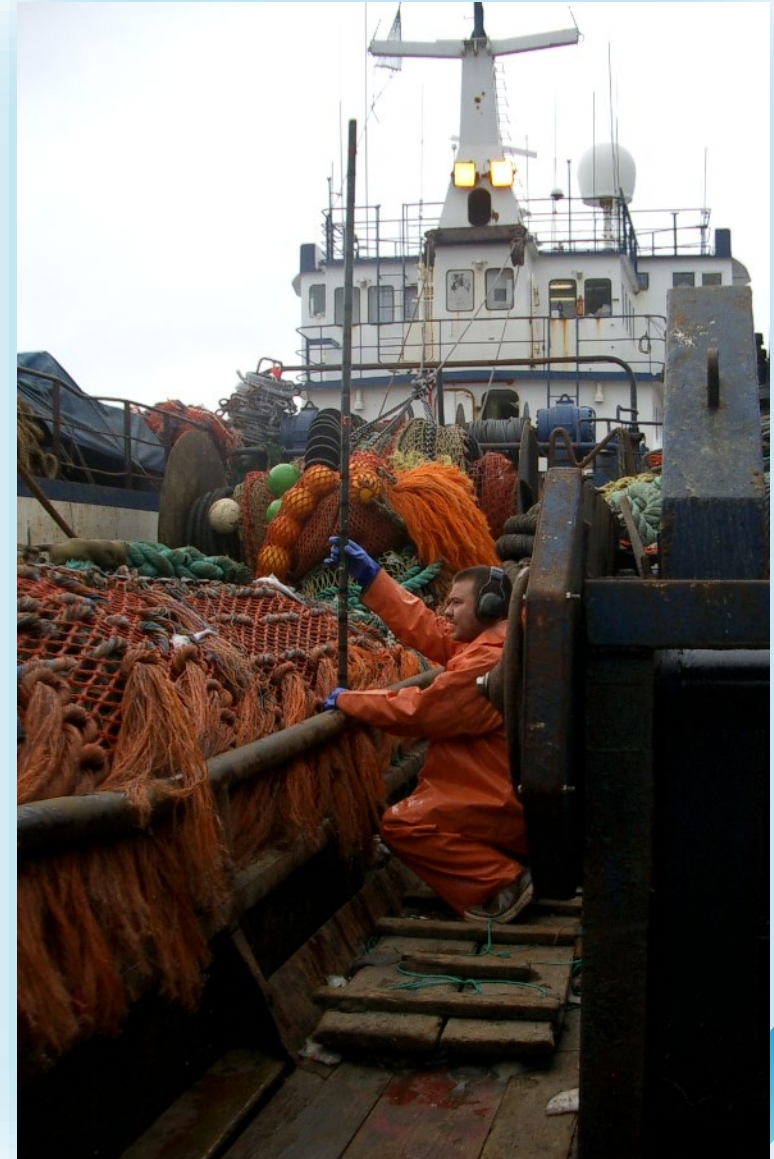
Increased flexibility and availability

- At the docks: NOAA provides inspections in Dutch Harbor and the greater Seattle area, including new springtime inspections in Seattle.
- At sea: NOAA inspectors are available to industry when there are at-sea scale or video issues.
- At shoreside processors: NOAA staff work collaboratively with industry as the agency reviews Catch Monitoring Control Plans annually.



North Pacific Observer Program

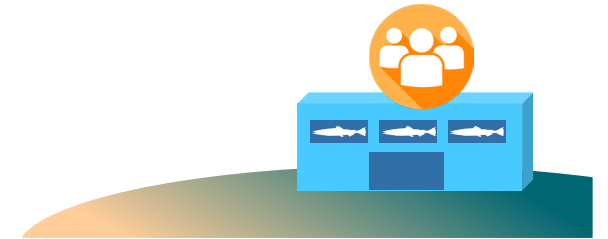
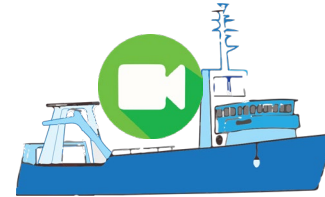
- Full coverage (100% or 200%) for the pollock fishery includes catcher-processors, motherships, catcher vessels, and shoreside processors when receiving or processing Bering Sea pollock
- In the Bering Sea, vessels and processors contract directly with permitted observer providers for NOAA-trained observers.
- Observers collect catch data that is used for in-season management and scientific purposes such as stock assessments and ecosystem studies



Trawl Electronic Monitoring for Catcher Vessels

New cooperatively-developed cost-efficient program to monitor catch accounting and maximum retention

- Implementation planned in 2024
- Voluntary electronic monitoring program
- Video monitoring ensures retention of catch
- All catch landed, sorted, and weighed
- Observers collect biological data from shoreside processors instead of on vessels



NOAA Collaborates with Industry to Minimize Bycatch

- Approves salmon bycatch Incentive Plan Agreements for Bering Sea/AFA fleet
- Tracks the fisheries daily looking for high rates of Prohibited Species Catch to inform “hot spot” closures
- Stays in close communication with the fleet and shoreside processors
- Conducts research on gear modifications like salmon excluders and changes in fishing net designs



Working Together through the Council Process

Pollock industry members participate actively in North Pacific Fishery Management Council committees and Plan Teams alongside other stakeholders and NOAA.

- Salmon Bycatch Committee
- Groundfish Plan Teams



NOAA Fisheries National Seafood Strategy

Purpose of the Strategy:

The Strategy will capture what NOAA Fisheries should do given current capabilities and authorities over the next five years to support seafood industry resilience and competitiveness.



National Seafood Strategy: 4 Goals

1. **Wild-capture fisheries:** Optimize sustainable production of U.S. wild-capture seafood
2. **Aquaculture:** Increase domestic aquaculture production and establish the U.S. as a global leader in sustainable aquaculture
3. **International trade:** Fair, reciprocal, and sustainable seafood trade
4. **Seafood promotion, infrastructure and workforce development:** Strengthen the entire seafood sector through collaborative marketing, infrastructure modernization, and workforce development



National Seafood Strategy

Policy Objectives

- Maintain/restore fish stocks, species conservation, maximum sustainable yield
- Increase value of catch for fishermen (e.g., increase harvest and dock price of U.S. seafood, maximum economic yield, U.S. market access, export opportunity)
- Increase U.S. seafood production (e.g., aquaculture, underused quota and species, processing trimmings)
- Increase jobs in and resilience of coastal communities
- Put domestic seafood back on U.S. plates, especially affordable seafood in disadvantaged communities
- Maintain/enhance food subsistence, tribal fisheries catch



Challenges for the Future

Continuing to Minimize Bycatch

- Collaborations with industry
- Gear modification research
- Genetics research

Adapting to Climate Change

- Movement of pollock (and other) stocks
- Alaska Climate Integrated Modeling Project

Maintaining Open Communication

Ensuring Continued Sustainability



Thank You!



NOAA
FISHERIES



GAPP State of the State

Craig Morris, GAPP CEO



WELCOME

TEAM
WILD ALASKA POLLOCK



**Thank
you to our
members!**

Akutan Catcher Vessel Assoc.

Alyeska Seafoods

American Seafoods

Aleutian Pribilof Island Community Development Assoc.

Arctic Fjord/Arctic Storm Management Group

Bristol Bay Economic Development Corp.

Central Bering Sea Fishermen's Assoc.

Coastal Villages Region Fund

Glacier Fish Company

Golden Alaska Seafoods

High Seas Fleet Cooperative

Northern Victor Fleet Cooperative

Norton Sound Economic Development Corp.

Ocean Beauty Seafoods

Peter Pan Fleet Cooperative

Trident Seafoods

Unalaska Fleet Cooperative

UniSea

UniSea Fleet Cooperative

Westward Fleet Cooperative

Westward Seafoods

Westward Seafoods, Northern Victor Division

Thank you to our associate members!

Mako

Trans-Ocean Products

Gold

Aquamar

Channel Fish

Delta Western

Gallagher Insurance

Gorton's Seafood

High Liner Foods

King & Prince Seafood

NORPEL

Simrad Fisheries

Silver

Alaska Ship Supply

Frontier Packaging

KeyBank

Girard Wood Products

Perkins Coie

Bronze

Arion Banki

Ballard Industrial

Beck Pack Systems

Islandsbanki

International Paper

Olympia

Highland Refrigeration

Lafferty's EMS

Northwest Farm Credit

OSU Surimi School

Petro Marine

Sugiyo USA

Wells Fargo

Young Ocean, Inc

Zep, Inc. | AFCO

GAPP'S *MISSION AND VISION*

Mission

Our mission is to educate customers and consumers, promote sales and best uses of the fish, and create awareness for product safety, traceability, health benefits, and the fishery.

Vision

The Association of Genuine Alaska Pollock Producers will communicate the innumerable attributes of Wild Alaska Pollock to customers and consumers around the world in a consistent, persuasive, and motivational way in order to build global demand for Wild Alaska Pollock and drive forward the GAPP mission with our members and partners.



GAPP's Focuses

Marketing & Communications



Data & Insights



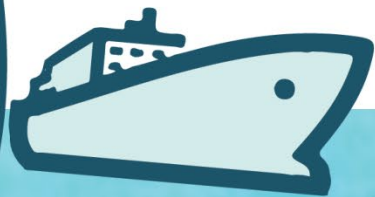
New Product Partnerships





We do things differently

We're unique



**Do you like
Wild Alaska
Pollock?**

**Yes?
...
Yes- I do!**



IT'S HIDDEN IN PLAIN SIGHT



What attributes
of the fish **resonate** with
consumers?

How do you
position
the *fish*?



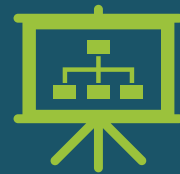
What was in it for **brands**
to put the name on
front of pack?



How do you get it
into **new product**
forms and *new channels*?



BUILD *DEMAND* AND *MANAGE* RISK





IT'S SO



**MAKING WILD
ALASKA
POLLOCK A
HOUSEHOLD
NAME**

LET'S START SPREADING THE NAME

**WILD
ALASKA
POLLOCK**



LET'S START SPREADING THE NAME



GAPP's Three Pillars

**Marketing &
Communications**



Data & Insights

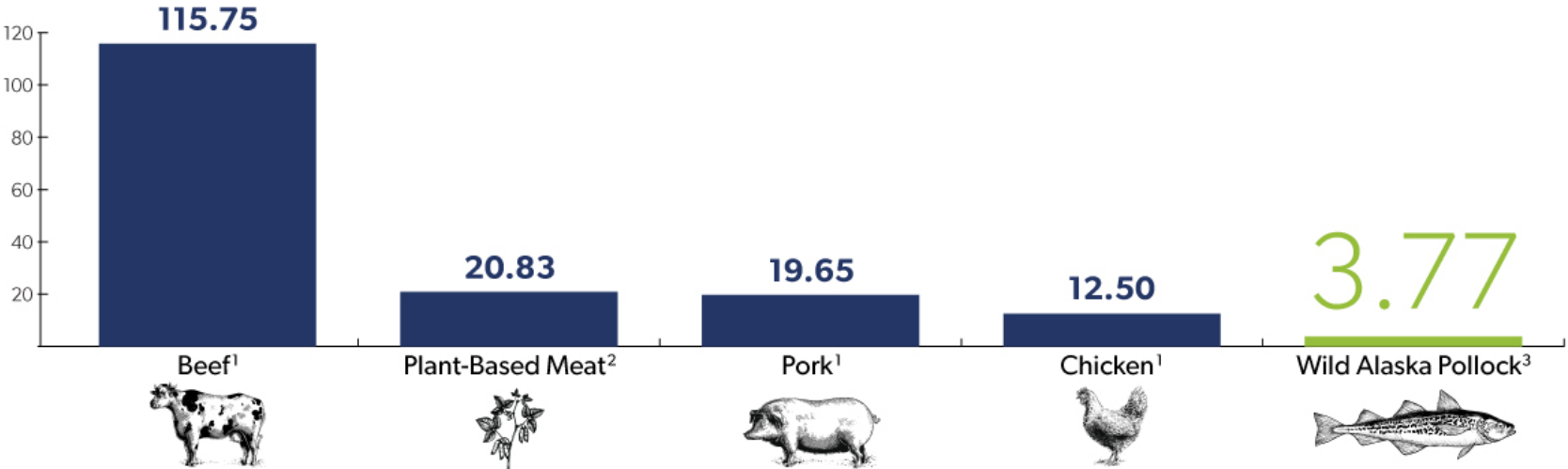


**New Product
Partnerships**



Among the Most Climate Friendly Proteins Ever (Fillet)

Carbon Impacts of Wild Alaska Pollock as Compared to Other Proteins (kg CO₂-eq per kg of protein)



¹ Monterey Bay Aquarium/Dalhousie University Seafood Carbon Emissions Tool; beef, chicken and pork measured as kg CO₂-eq per kg of protein, midpoints for reported range (as of July 14, 2021)
² Comparative environmental LCA of the Impossible Burger® with conventional ground beef burger, Quantis International (2019)
³ Quantis International. Life Cycle Assessment of Wild Alaska Pollock: ISO LCA Report (2021)



It's kinda a big deal...

SURIMI SEAFOOD



... and the YOY Study

Top reasons Fish Eaters are not likely to purchase Surimi Seafood in the next three months





SO MUCH TO SAY ABOUT SURIMI SEAFOOD

Sharon Ripps, GAPP Research Advisor, April 07, 2022
Hear from Sharon Ripps, GAPP's Research Advisor, about her thoughts on the opportunities of Surimi Seafood



THE FAMILIAR LOVE LANGUAGE OF PUMPLINGS

March 28, 2022



THE SEASON OF SACRIFICE HAS SPECIAL MEANING THIS YEAR

Craig Morris, March 02, 2022
The Lenten season began today, March 2nd, 2022. Hear some thoughts from our CEO Craig Morris



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The Free Encyclopedia

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Alaska pollock

From Wikipedia, the free encyclopedia

The **Alaska pollock** or **walleye pollock** (*Gadus chalcogrammus*) is a marine fish species of the cod genus *Gadus* and family Gadidae.

It is a semi-pelagic schooling fish widely distributed in the North Pacific, with largest concentrations found in the eastern Bering Sea.^[3]

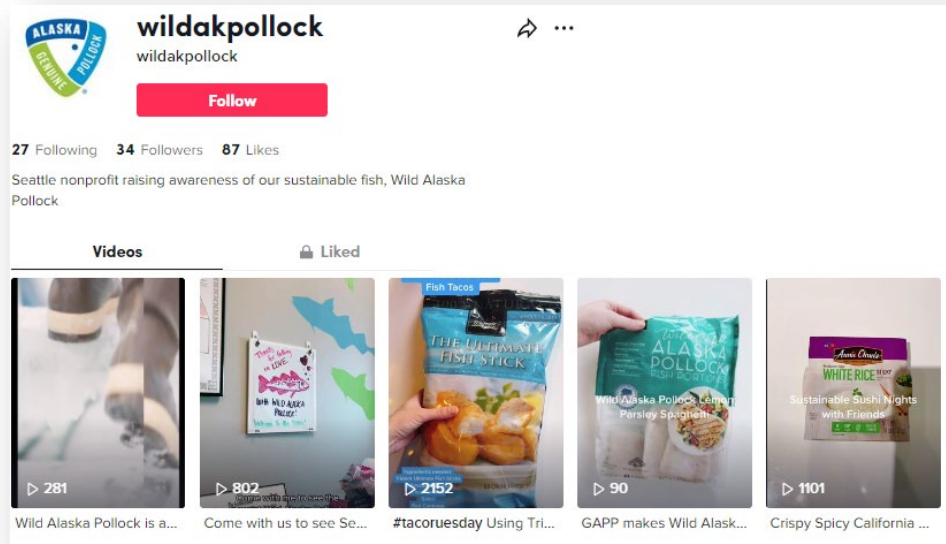
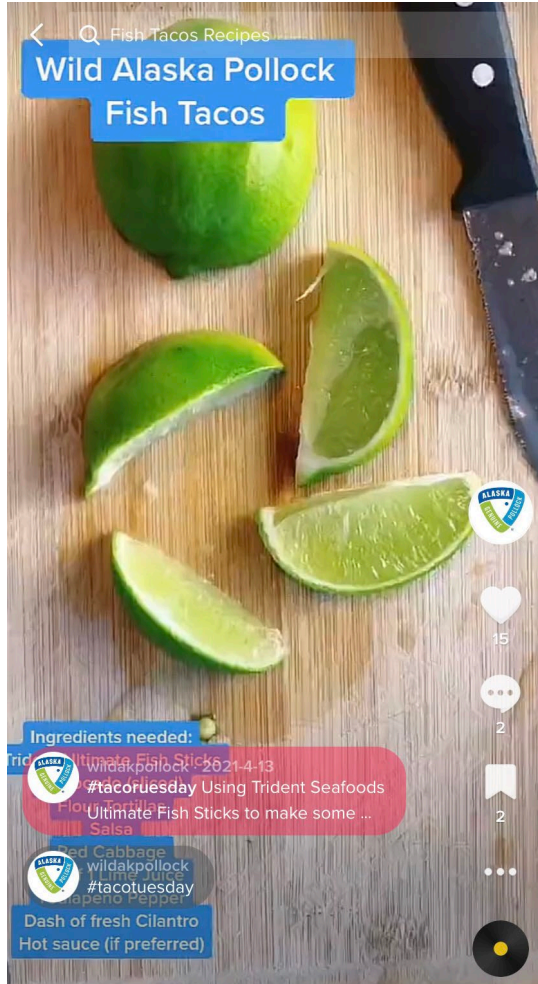
Contents [hide]

- Name and differentiation
- Ecology
 - Foraging behavior
- Distribution
 - Alaska pollock in the Pacific Ocean
 - Small populations in the Arctic Ocean (Barents Sea)
- Fisheries
- As food
 - Fillets

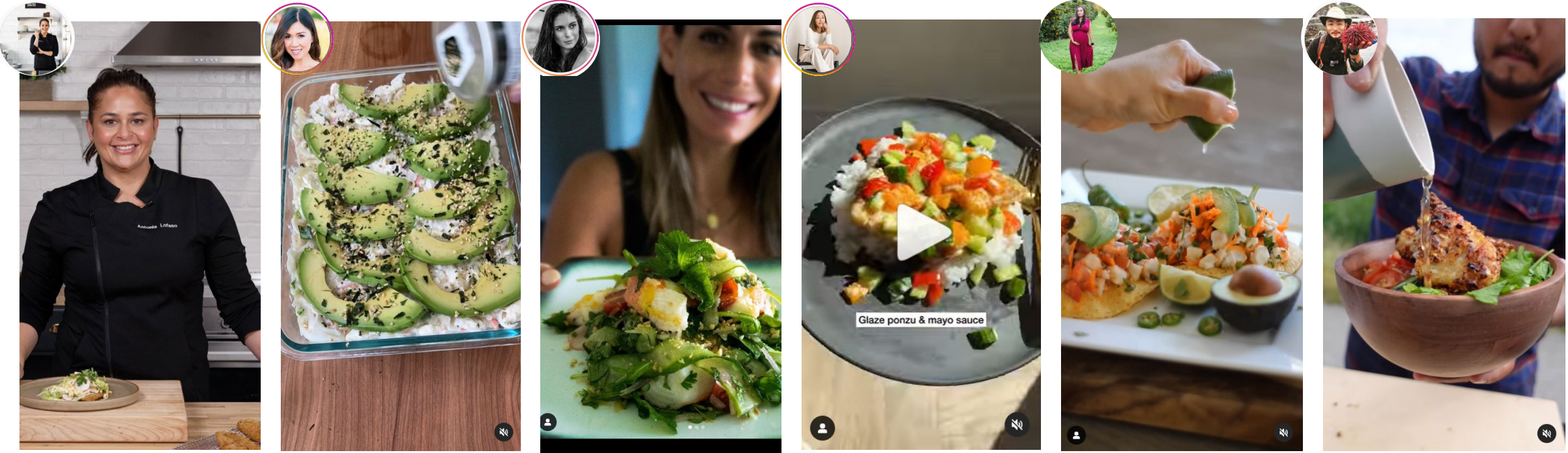
Alaska pollock

Conservation status





INFLUENCERS

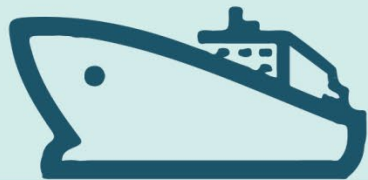


In just one month, the Awareness and Demand campaign achieved a total of **21** social posts featuring a diverse range of **10** on-trend recipes. Content was amplified across social channels, achieving over **14M** impressions and over **12K** clicks to GAPP's *'Where To Buy'* landing page.





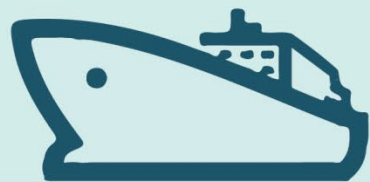
WILD ALASKA
POLLOCK'S 5
KEY
ATTRIBUTES



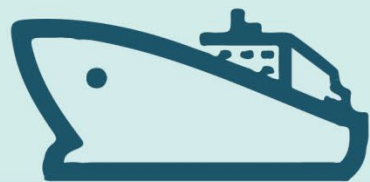
- 1. Wild Caught**
- 2. Alaska Origin**
- 3. Mild Tasting**
- 4. Nutritious**
- 5. Sustainable**



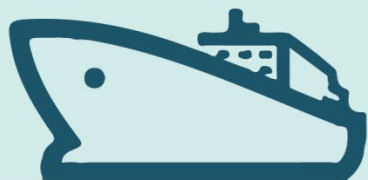
**WE BUILD
THAT
RECOGNITION**



**WE BUILD
THAT
FAMILIARITY**



**WE BUILD
THAT BRAND!**



**AND THEN...
PEOPLE START
TO SAY OUR
NAME**



New Product Partnerships



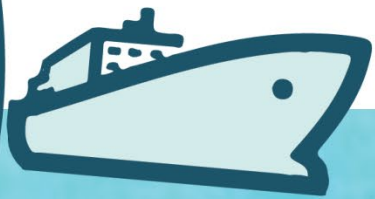
“More partners putting **more**
Wild Alaska Pollock in front of
more people every day.”

– *Joe Bundrant*, CEO Trident Seafoods



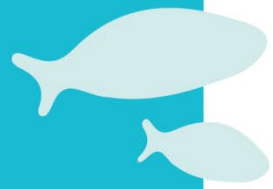
Since its inception, the GAPP Partnership Program has obligated nearly

\$8MM in GAPP funds and has had brand matching funds as a part of these campaigns in excess of **\$32MM.**



**GAPP partners have spent
over 4 times what GAPP
has, so that's basically
40 million dollars in
marketing our fish!**





THE SECRET'S IN THE SAUCE



We're putting in the work





HARDER

FASTER

BIGGER

BOLDER





**THANK
YOU**

**Let's get
started!**





Food Trends that Matter to Wild Alaska Pollock

Amanda Buckle, Managing Editor, Seafood News & Urner Barry's Reporter

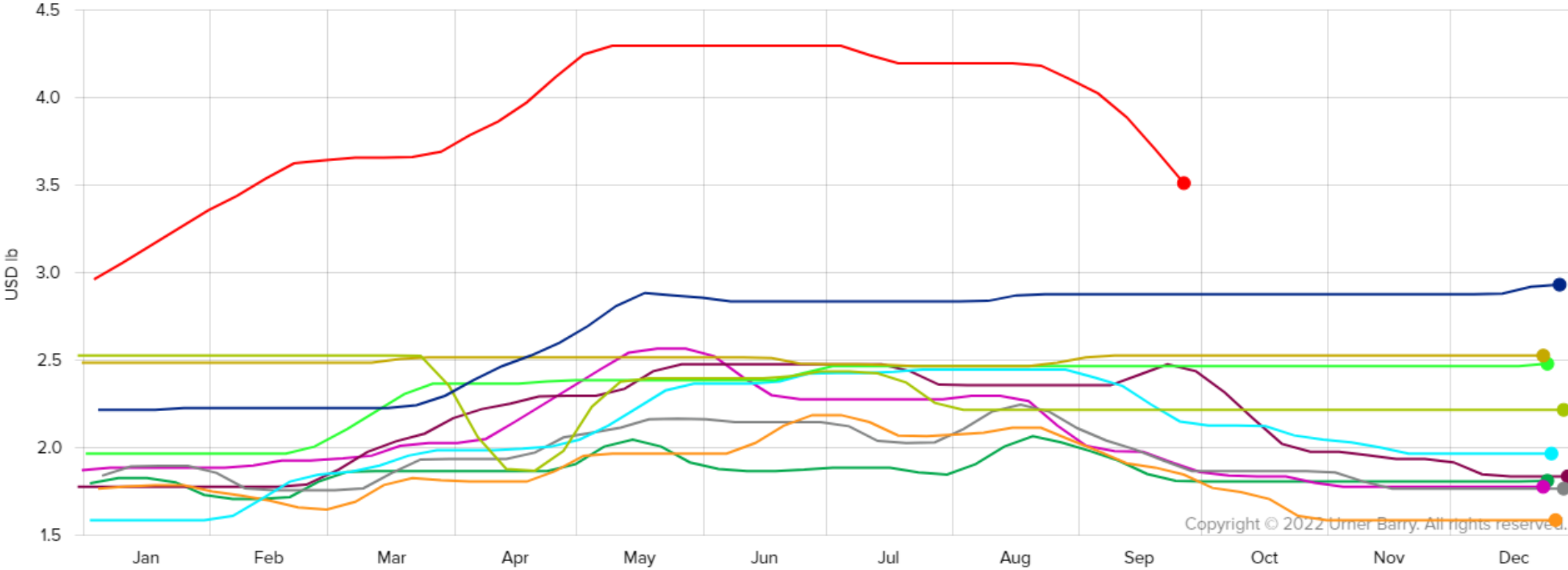


The Chicken Sandwich Wars



UB Chicken - East Select Boneless/Skinless Breasts, Full Butterfly, Tender Out

Monday, January 2, 2012 - Monday, September 26, 2022



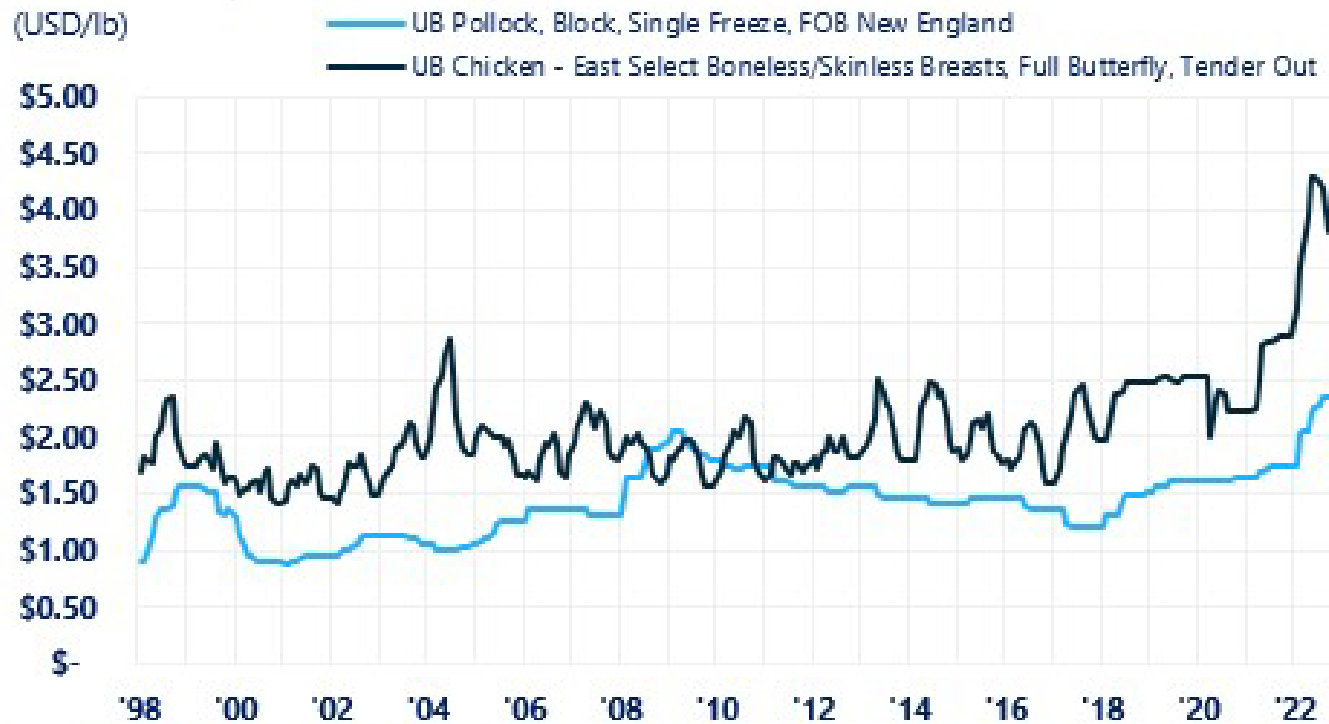
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- 2012 (Quote)
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- 2018 (Quote)
- 2019 (Quote)
- 2020 (Quote)
- 2021 (Quote)
- 2022 (Quote)

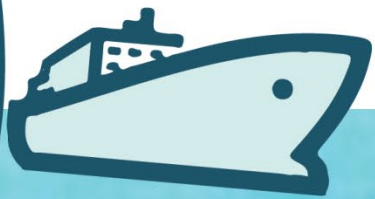


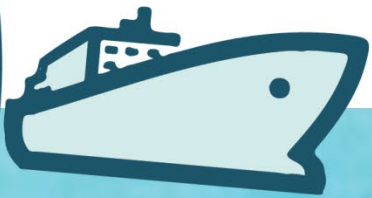
Urner Barry Wholesale Quote

(USD/lb)



Source: Urner Barry, UB Consulting





Alternative Proteins



Plant based in the future

- According to Datassential, plant-based items are expected on 40% of menus by 2025
- Top concerns for eating more plant based: eating healthy and environmental concerns
 - Who is this audience? Keep an eye on Gen Z (born 1997-2012)



Smart Cooking



“Meals that cook themselves”



Social Media



JAN
2022

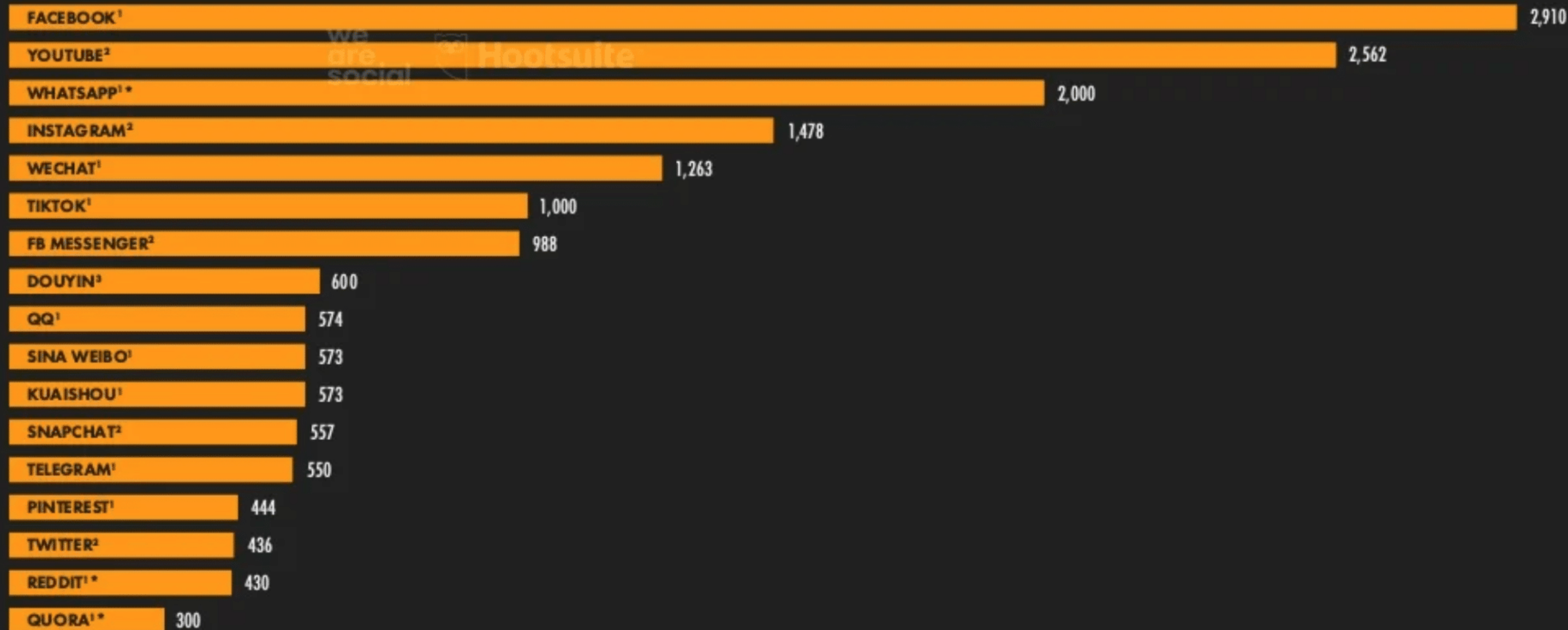
THE WORLD'S MOST-USED SOCIAL PLATFORMS

RANKING OF SOCIAL MEDIA PLATFORMS BY GLOBAL ACTIVE USER FIGURES (IN MILLIONS)



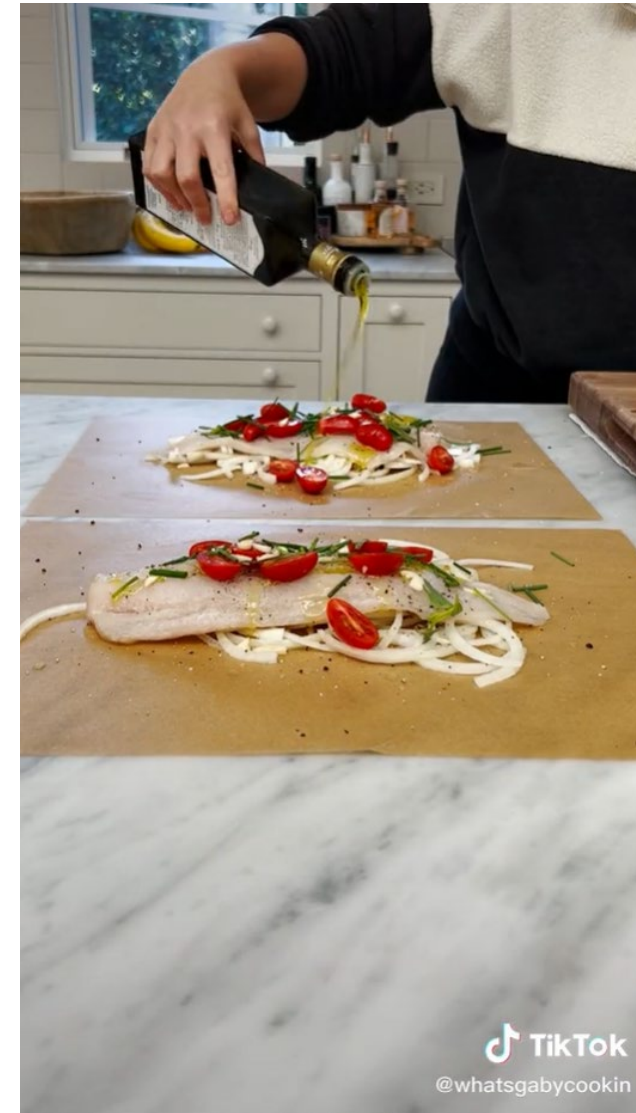
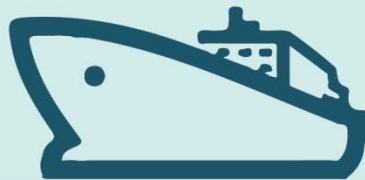
GLOBAL OVERVIEW

we
are
social



TikTok

- 25% of active users are between 10-19
- 22.4% are between 20-29
- 21.7% are between 30-39
- 20.3% are 40-49
- 11% are 50+
- Total users are expected to reach 1.8 billion by the end of 2022

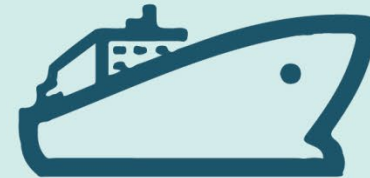


Pinterest predicts...



Ancestral Eats

- Norwegian recipes traditional +120%
- Filipino recipes authentic +35%
- Traditional Russian food +3x
- South African recipes traditional +150%
- Arabic food traditional +2x



Trending...

- Complex Heat
- Environmentally friendly
- Sustainable
- Leftovers
- Bento box lunch ideas
- “Boosting” foods





GET SOCIAL WITH #GAPPAM2022



**LET US KNOW
YOUR THOUGHTS**

#TEAMWILDALASKAPOLLOCK
#GAPPAM22
#WILDALASKAPOLLOCK
#CLIMATEFRIENDLYPOLLOCK

- **Twitter:** @wildakpollock
- **Instagram:** @wildakpollock
- **Facebook:** Genuine Alaska Pollock Producers
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Wild Alaska Pollock Fishery Update

Ron Rogness, GAPP Consultant; Jana Dombrowski, Wells Fargo Senior Vice President



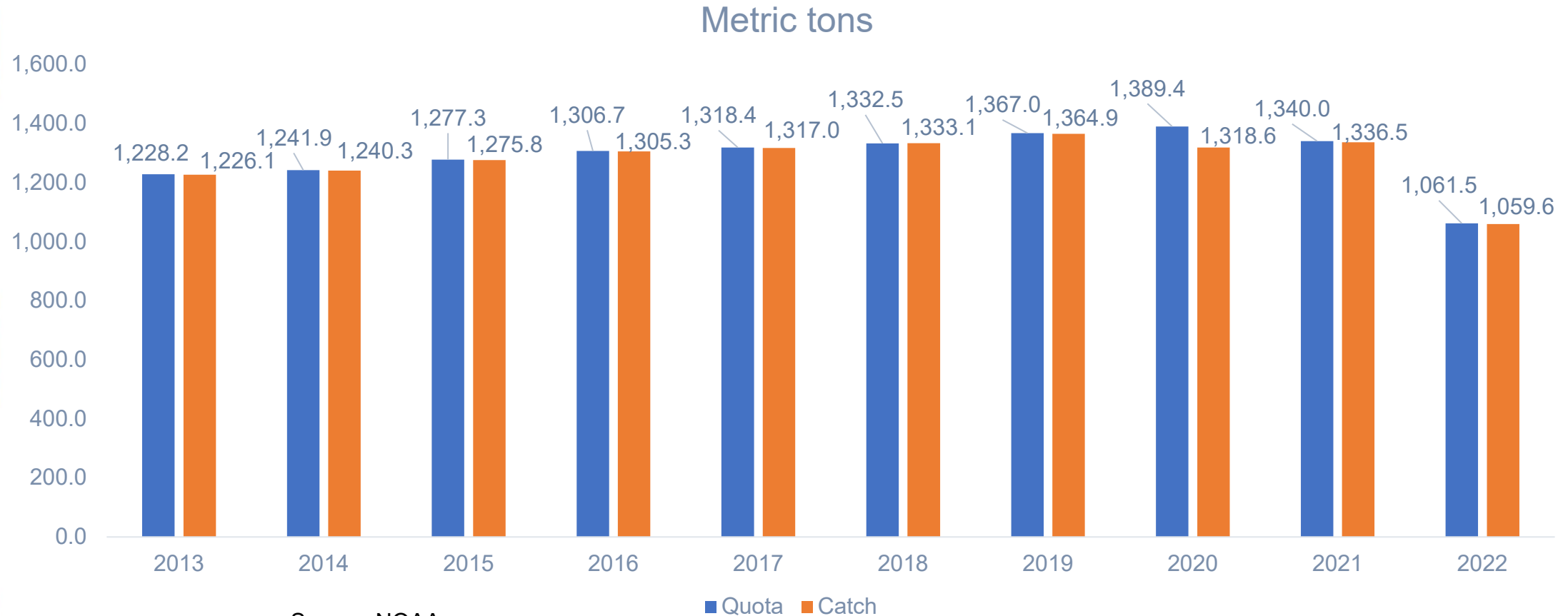
Fishery Performance Update

Ron Rogness

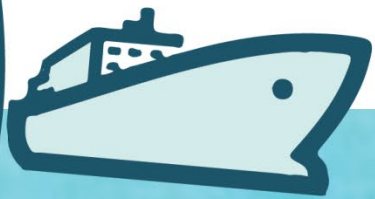
Economic Advisor to GAPP



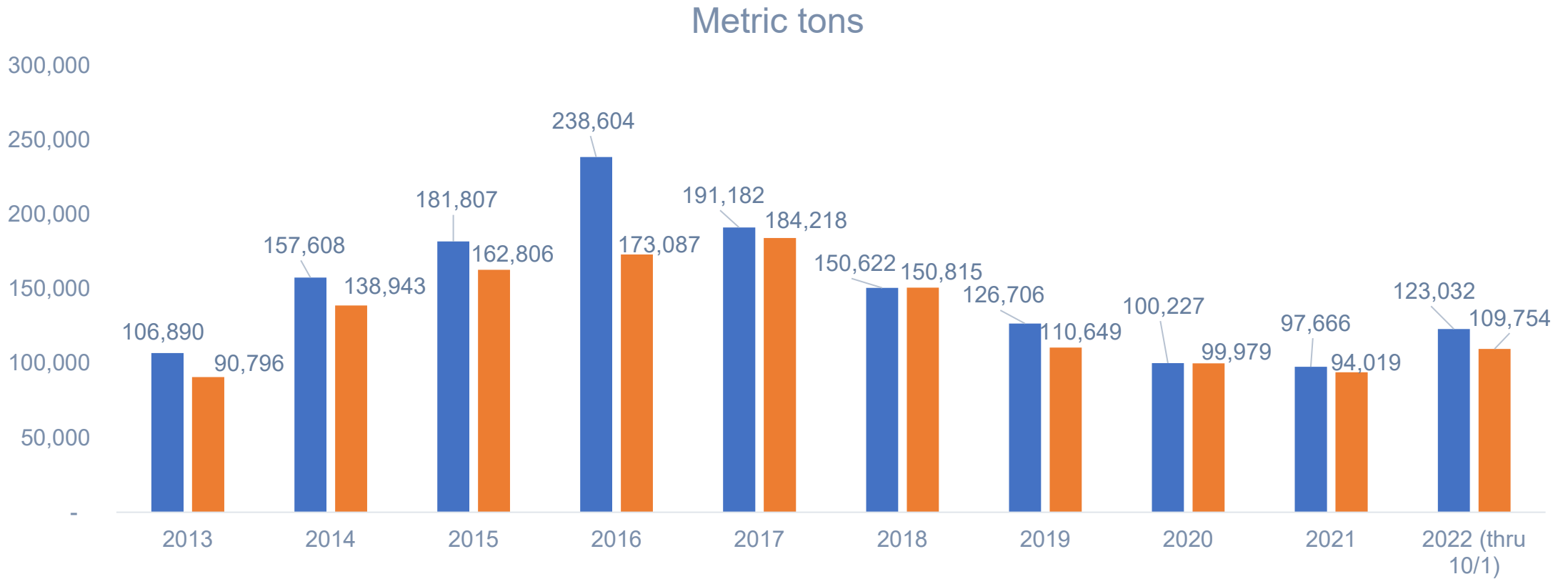
Other than the Covid-impacted year of 2020, fishery catches average 99.9% of the quota in the Bering Sea directed fishery



Source: NOAA

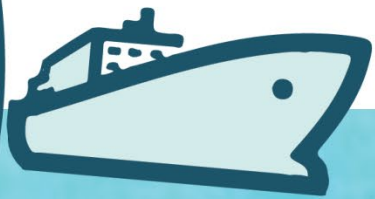


In the Central and Western regions in the GOA, the directed fishery averages 88.8% of the quota



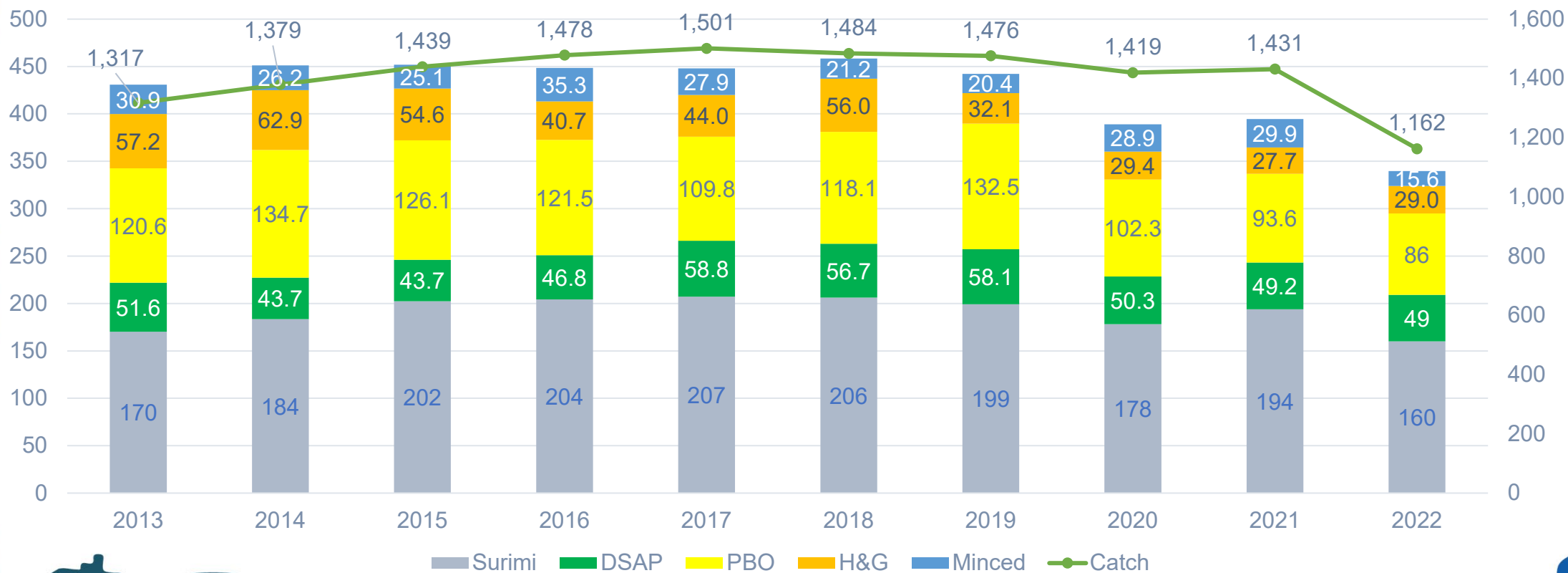
Source: NOAA

■ Quota ■ Catch



Production of PBO, DSAP and Surimi

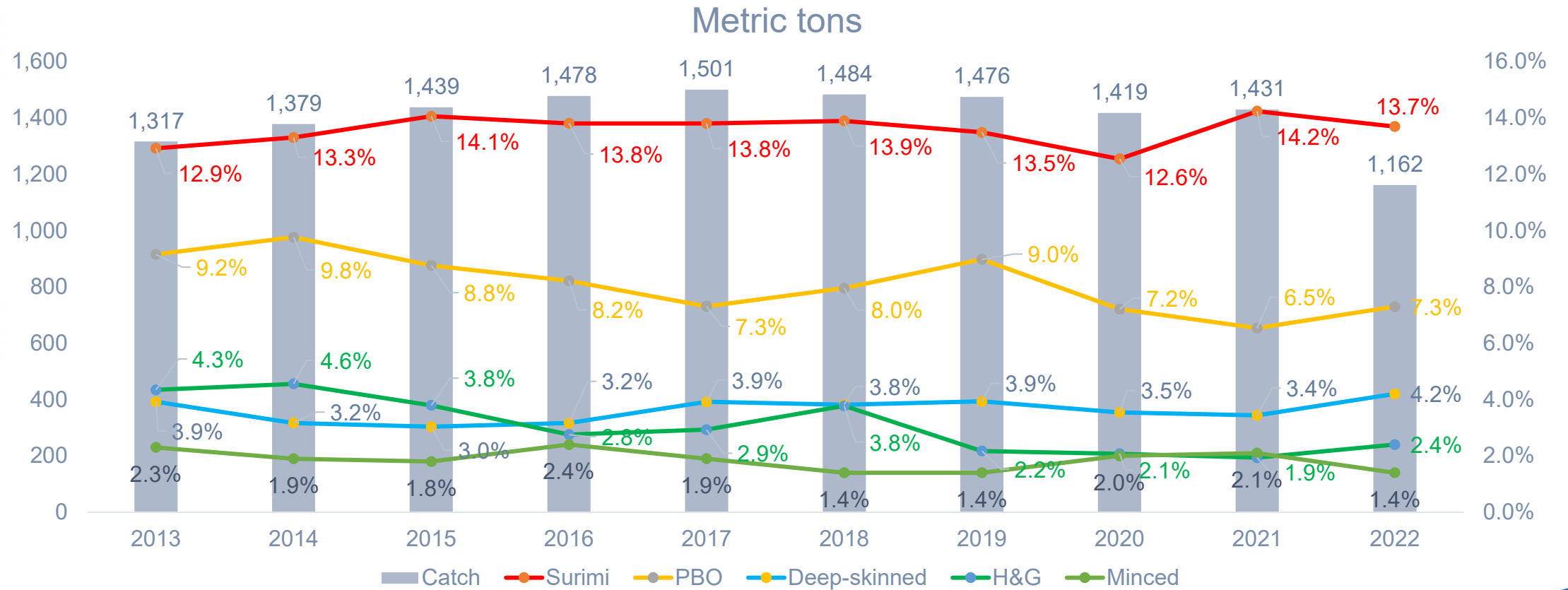
Thousands of metric tons



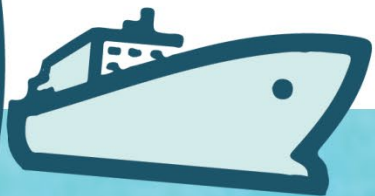
Source: NOAA



Surimi and deep-skinned retaining share of catch whereas PBO, H&G and minced all declining



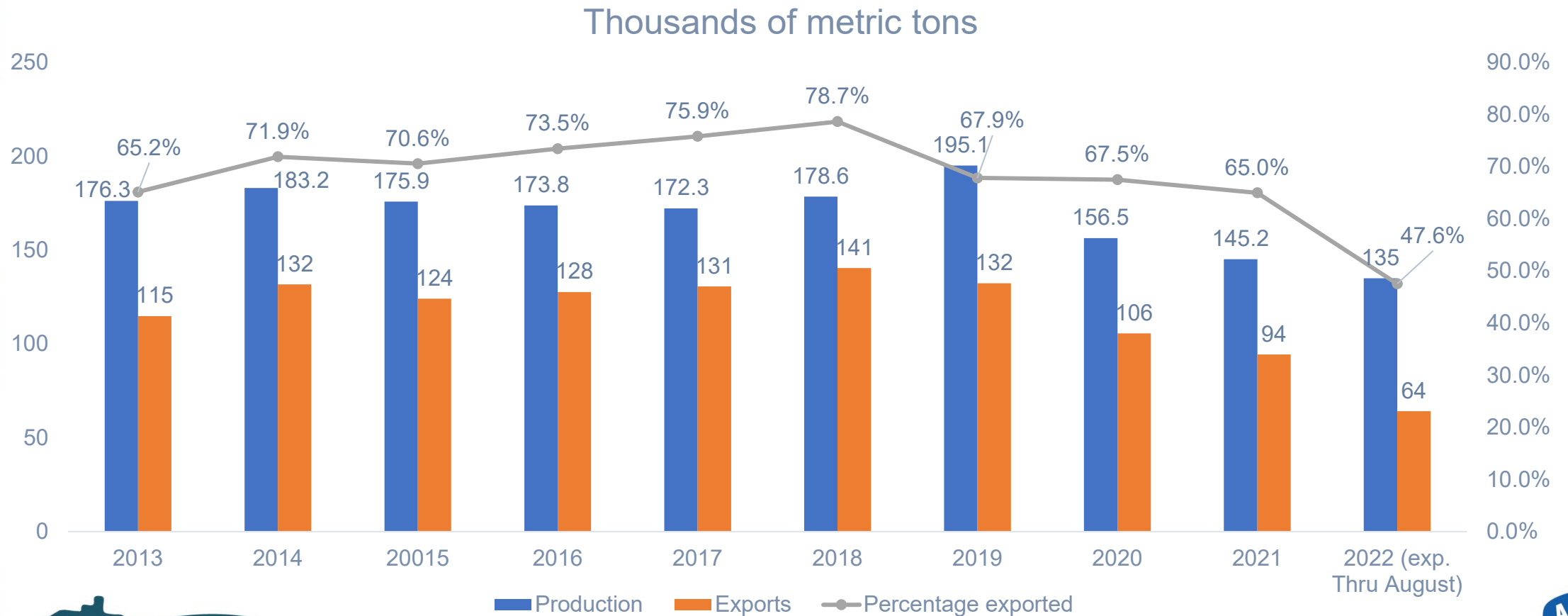
Source: NOAA



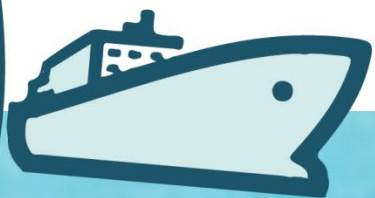
Exports of Wild Alaska Pollock Products



Since 2018, the percentage of fillets exports has dropped 17.5%

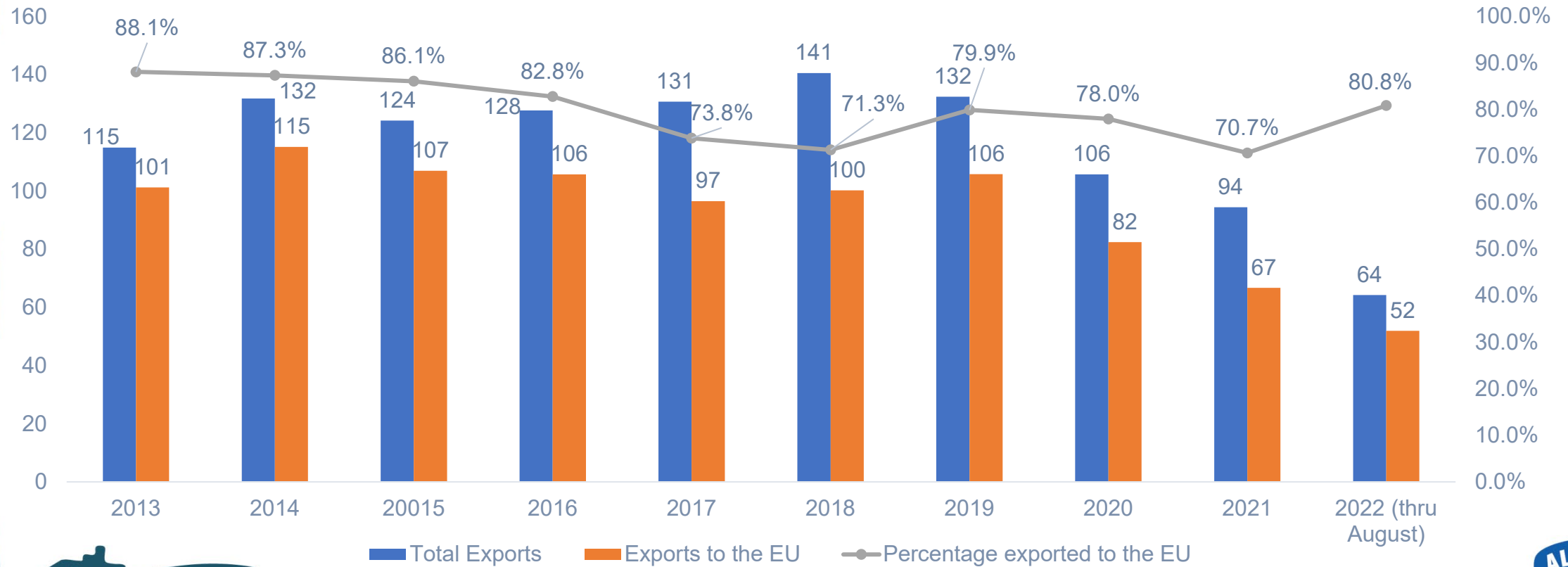


Source: NOAA, US Census Bureau

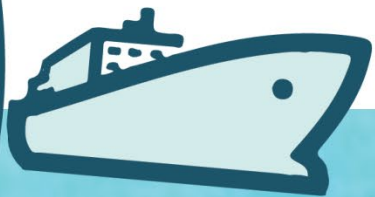


EU represents a smaller percentage of the fillet export market as of late

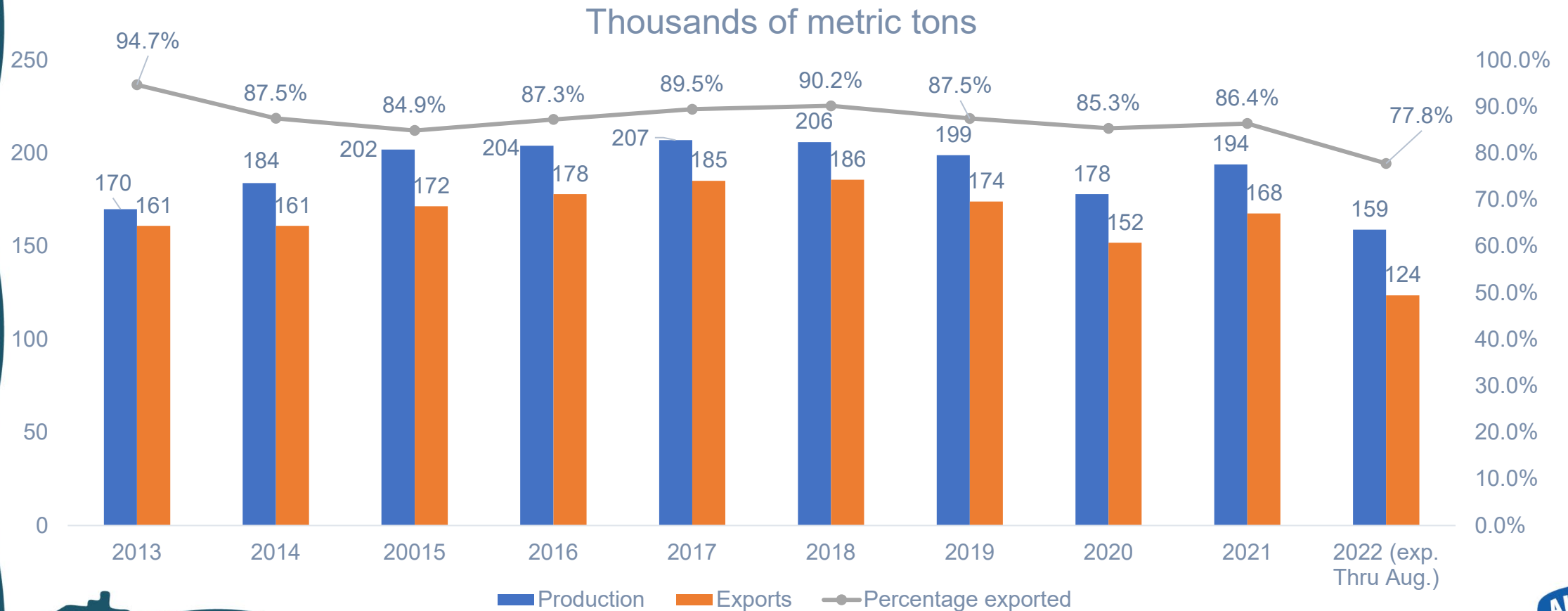
Thousands of metric tons



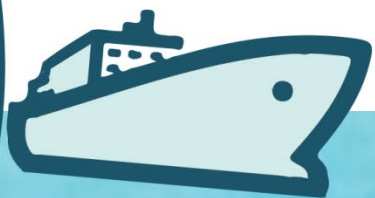
Source: US Census Bureau



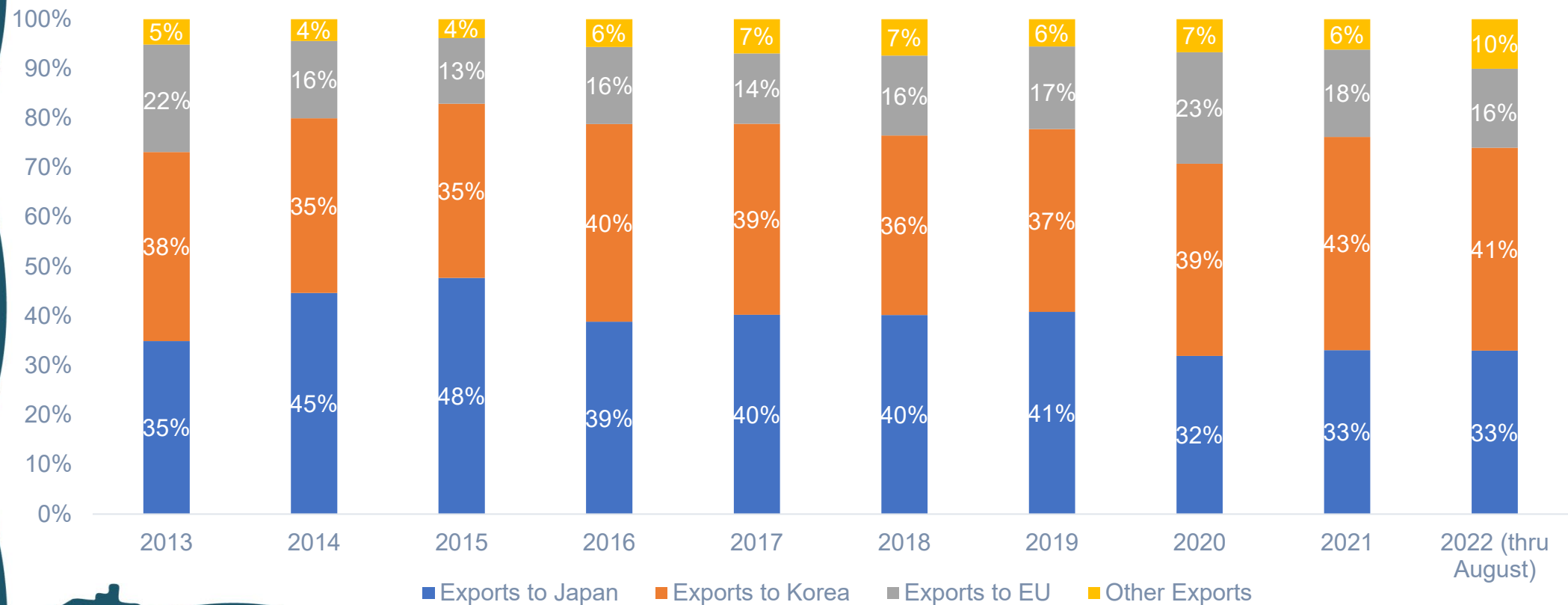
While still an export-dependent market, the US surimi market has picked up about 5% of the total production over the past four years



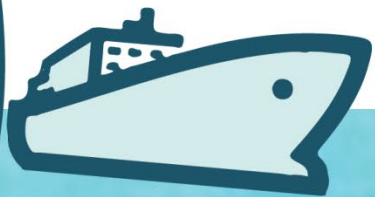
Source: US Census Bureau



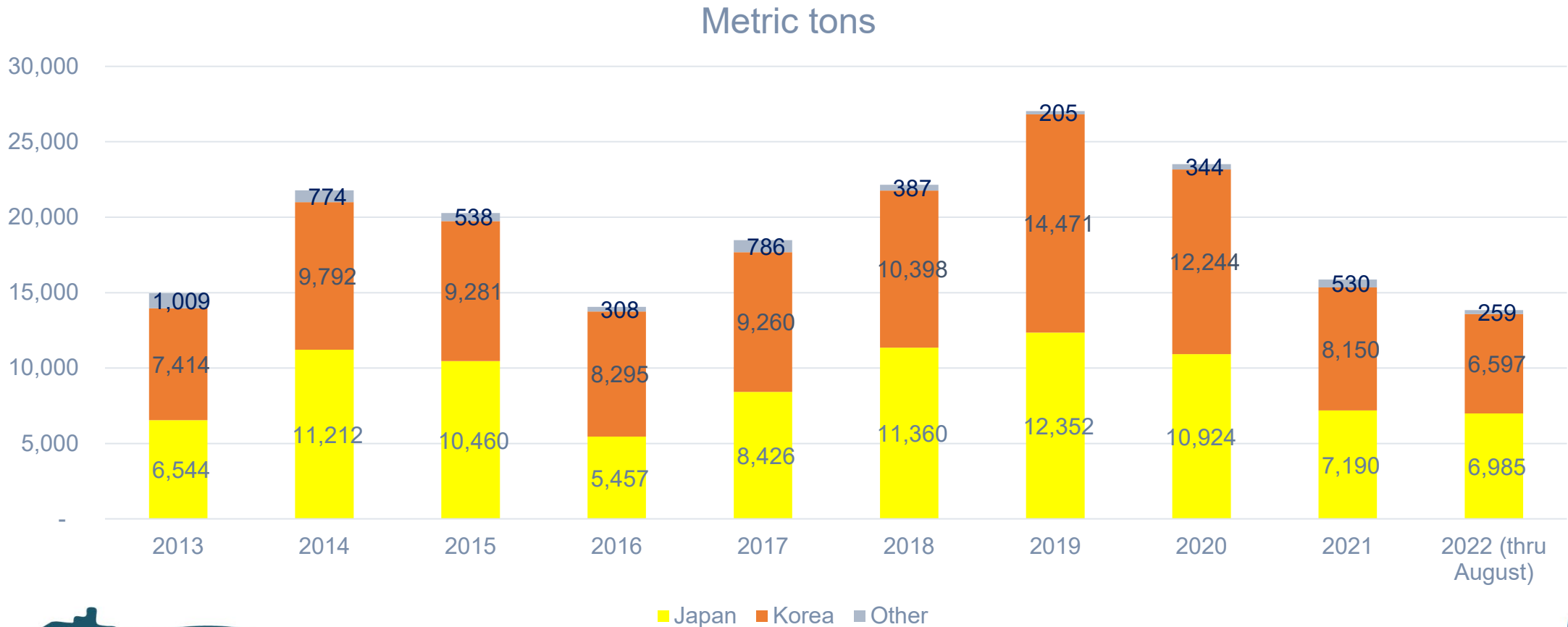
Surimi slowly reducing its dependency on Japan and Korea



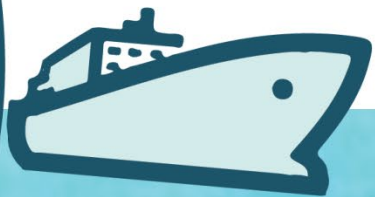
Source: US Census Bureau



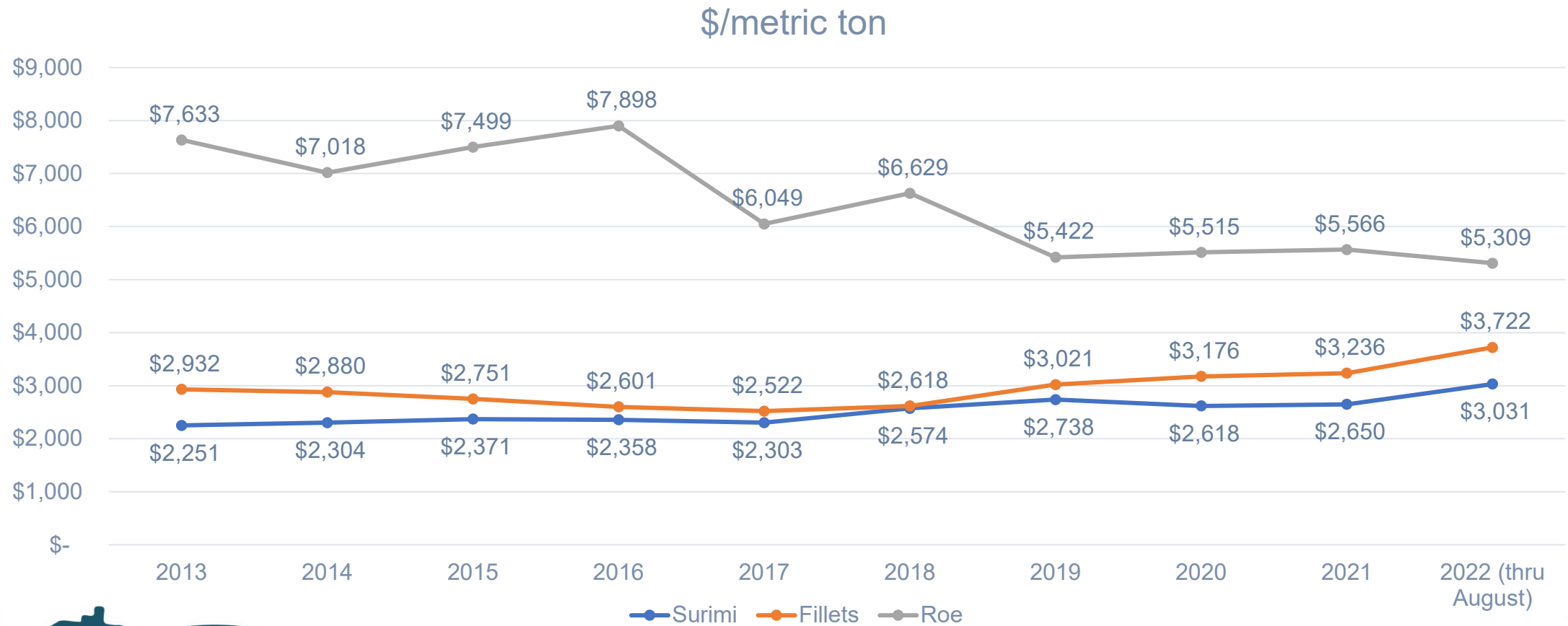
Alaska Pollock roe exports are half what they were in volume and less than half in value versus three years ago



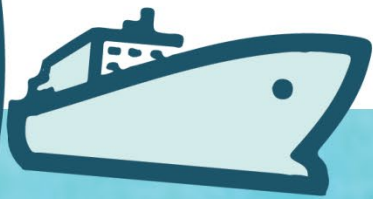
Source: US Census Bureau



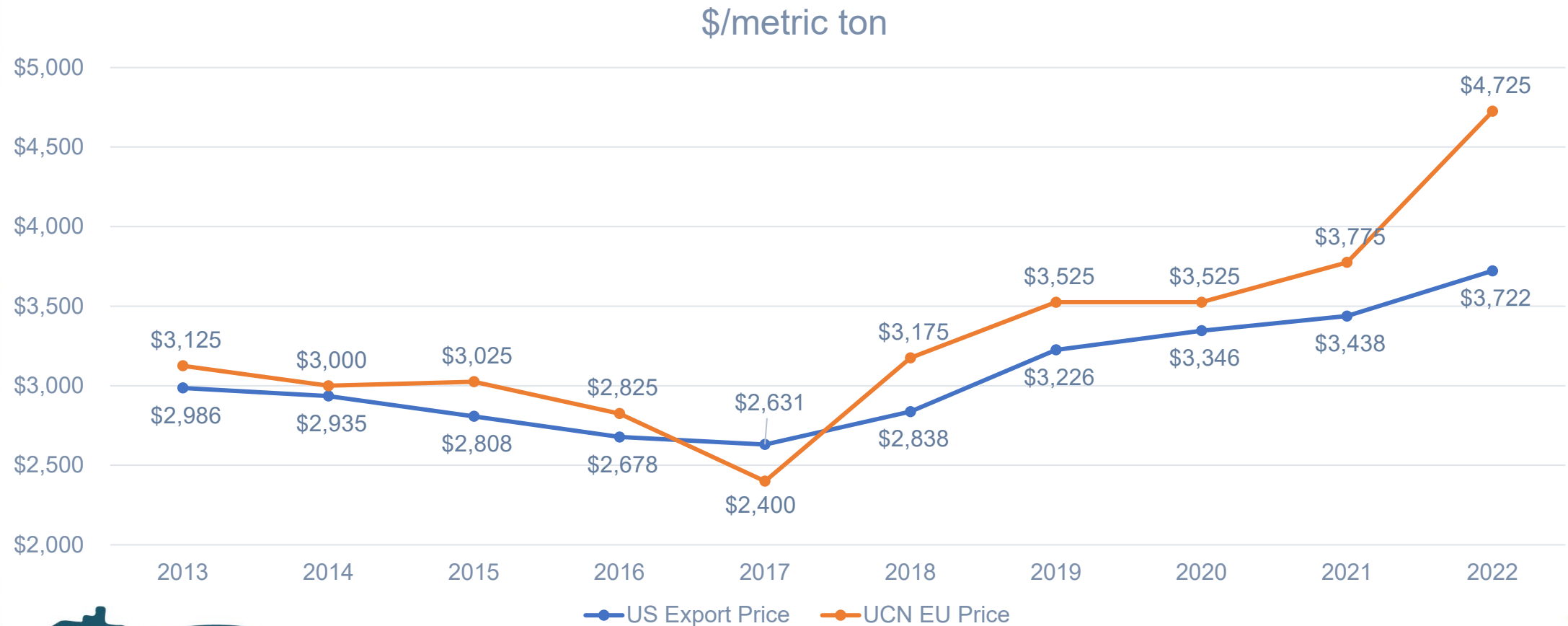
Export prices of surimi and fillets are up 30% and 47% respectively since 2018; Roe prices have dropped by 1/3 over roughly that time



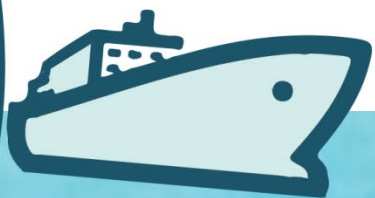
Source: US Census Bureau

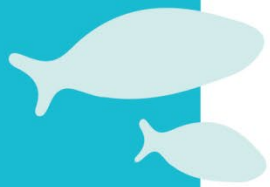


Undercurrent News price portal vs declared US export price



Source: US Census Bureau and Undercurrent News Price portal





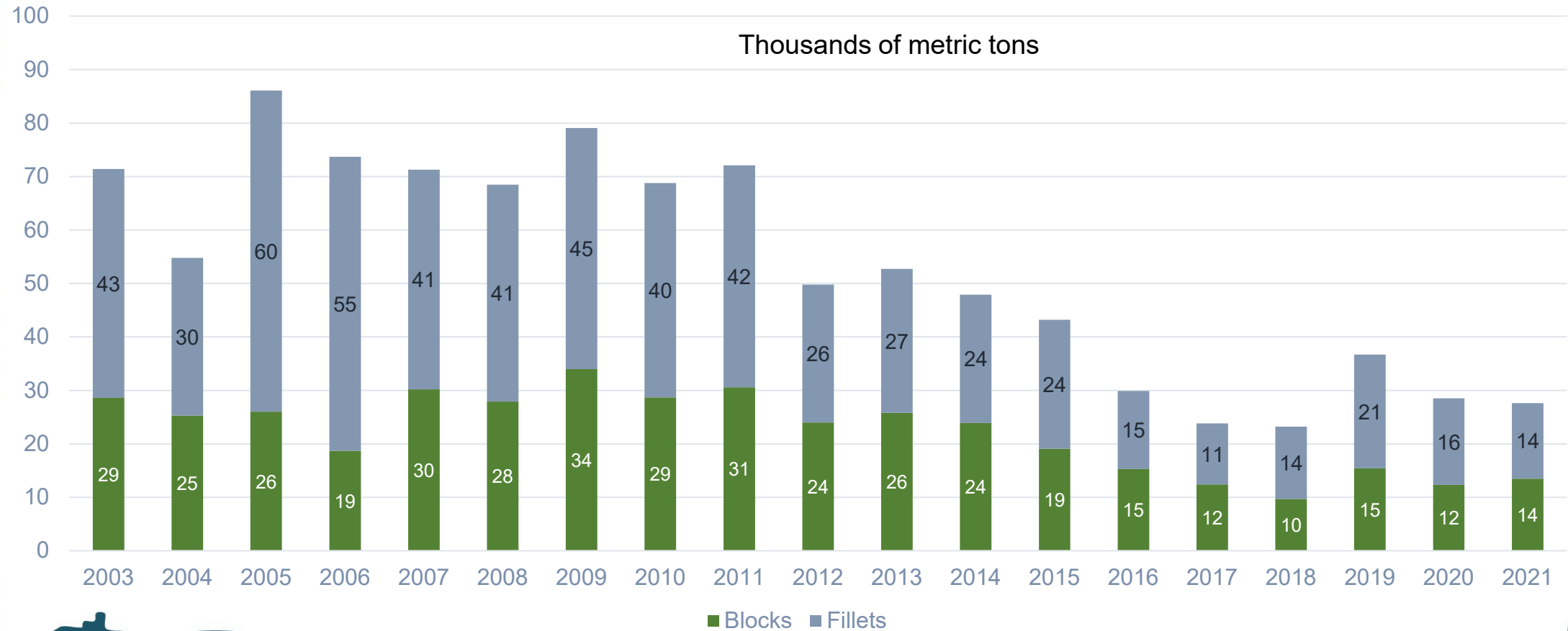
Despite a 19% decline in catch, the wholesale value of the fishery production fell by only 1% to \$1.329B in 2022



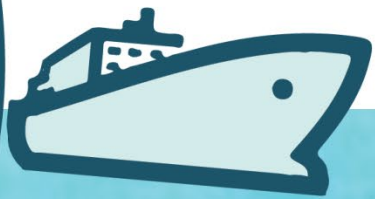
U.S. Imports of Competitive Whitefish Products



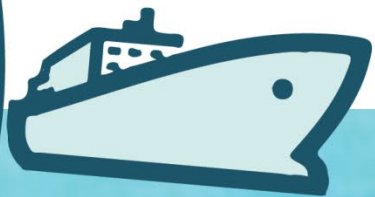
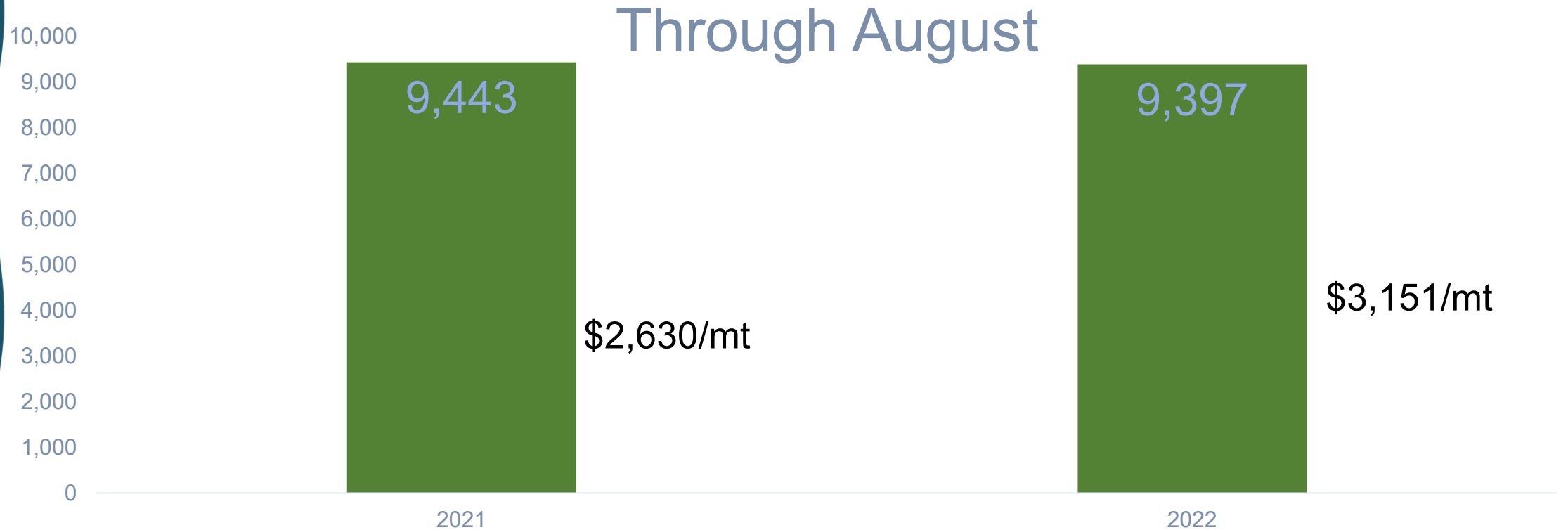
Imports of Pollock blocks and fillets rallied in 2019, but then resumed their decline through 2021



Source: US Census Bureau



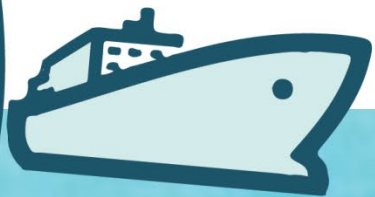
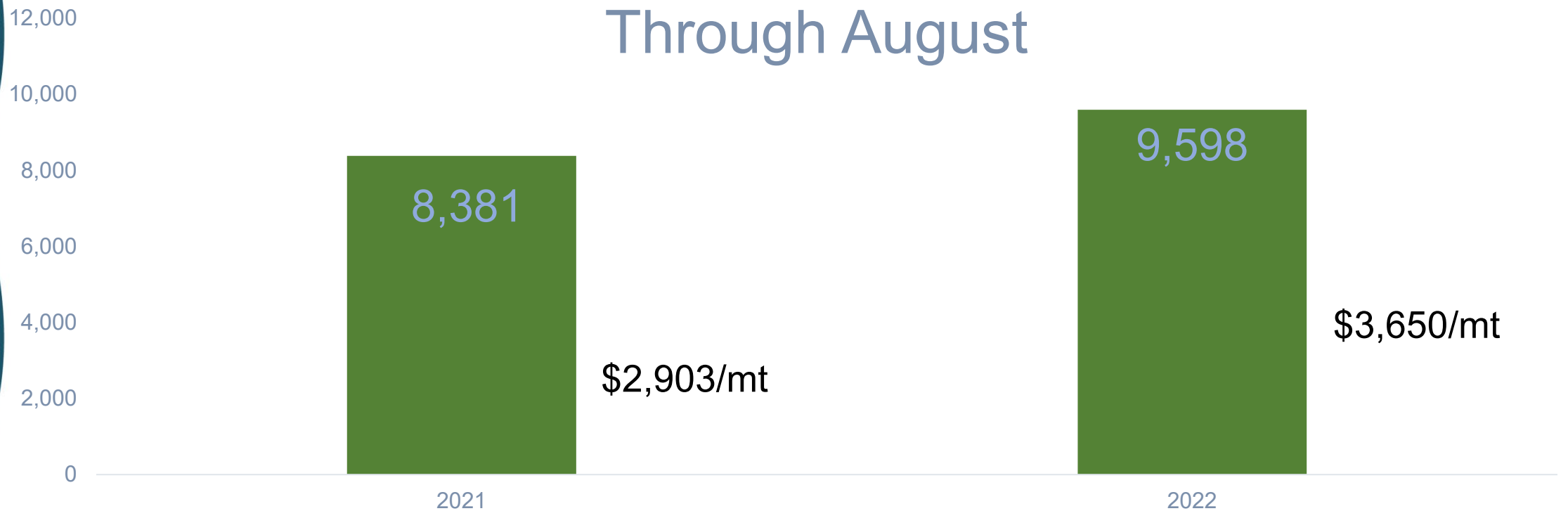
Imports of Pollock fillet blocks down another 0.5% in 2022 with prices up 19.8%



Source: US Census Bureau



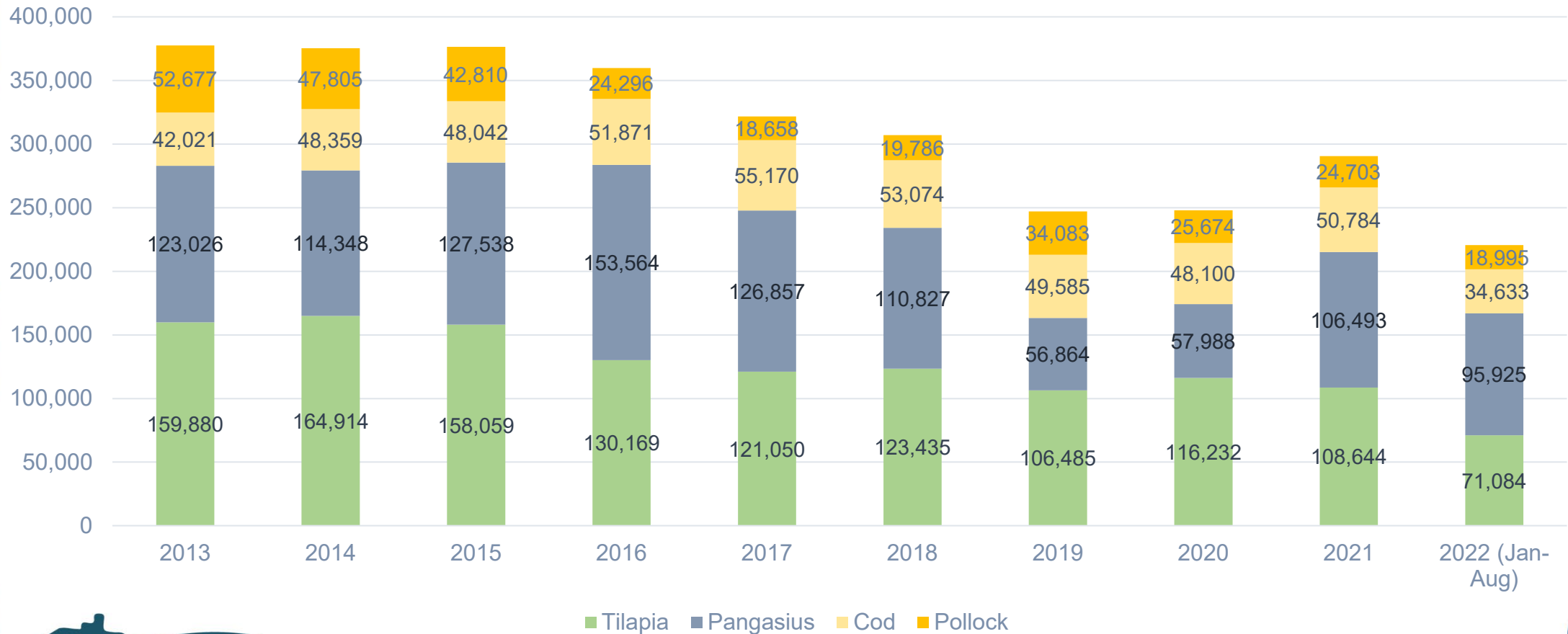
Imports of Pollock fillets up 14.5%, with prices up 25.3%



Source: US Census Bureau



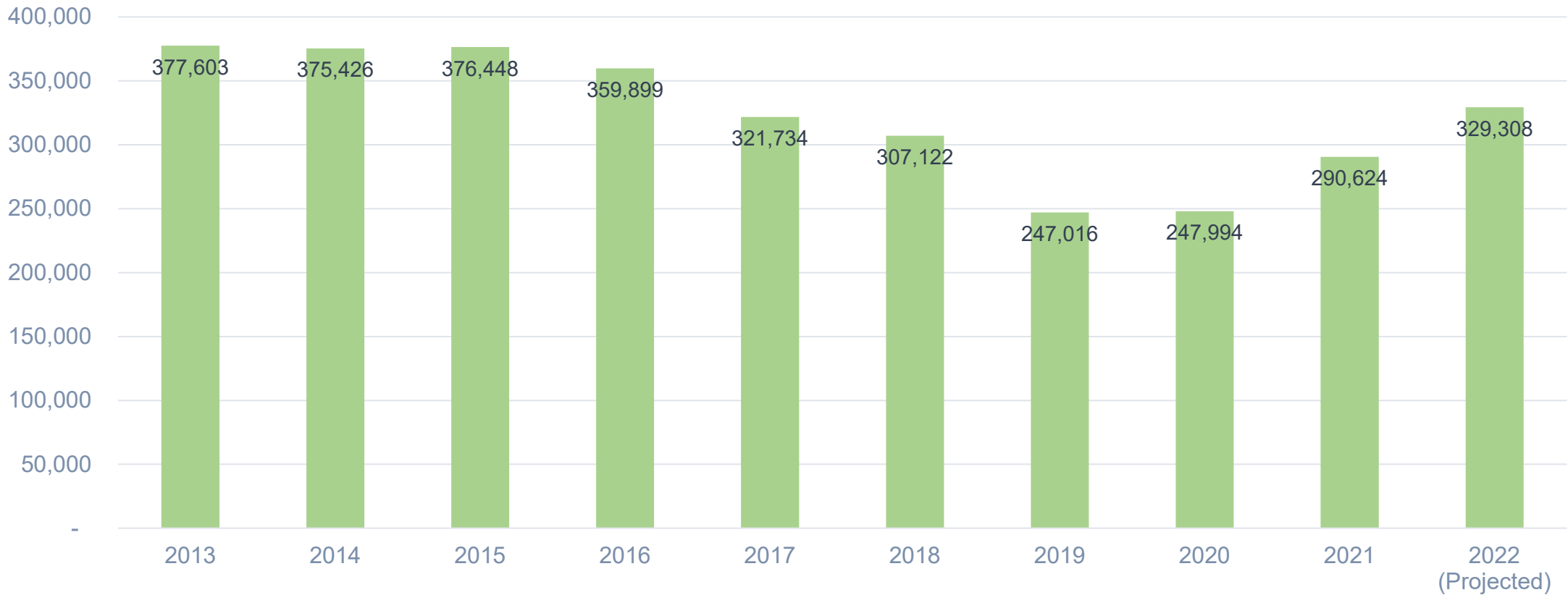
Imports of competitive whitefish fillets down considerably, driven by tilapia and pollock, but especially pangasius



Source: US Census Bureau

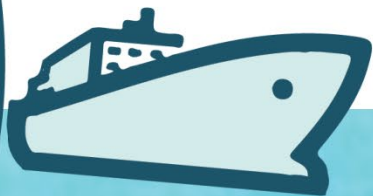


The last five years, imports of competitive whitefish fillets has been down 25% compared to the prior five years but rebounding strongly in 2022

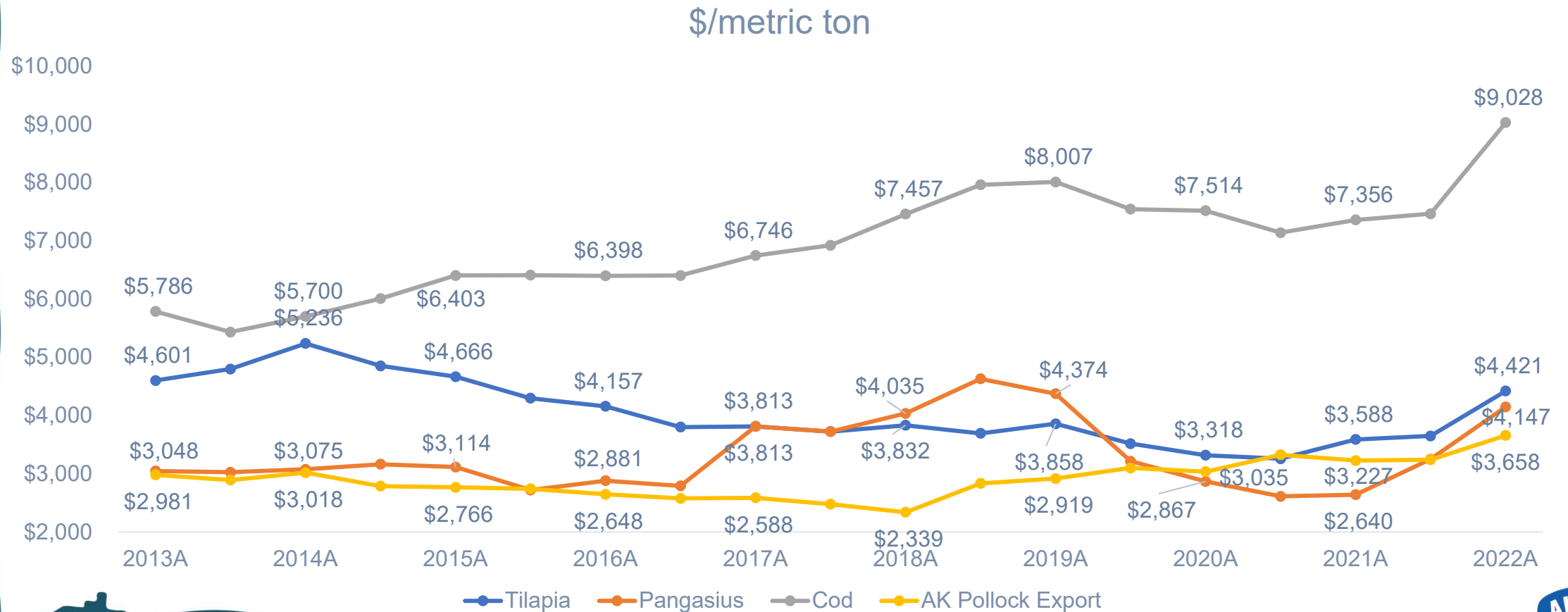


■ Combined Imports of Tilapia, Pangasius, Cod and Pollock frozen fillets

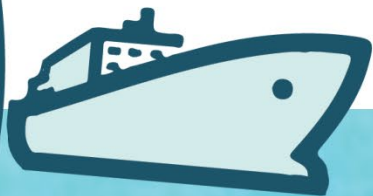
Source: US Census Bureau



Prices of whitefish fillets moving in unison over past 12 months

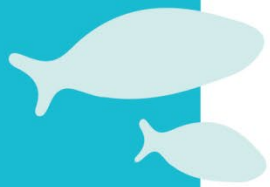


Source: US Census Bureau



U.S. Supply and Per Capita Consumption of Wild Alaska Pollock/Pollock Products





Alaska Pollock/Pollock consistently in the top 5 seafood items in per capita consumption

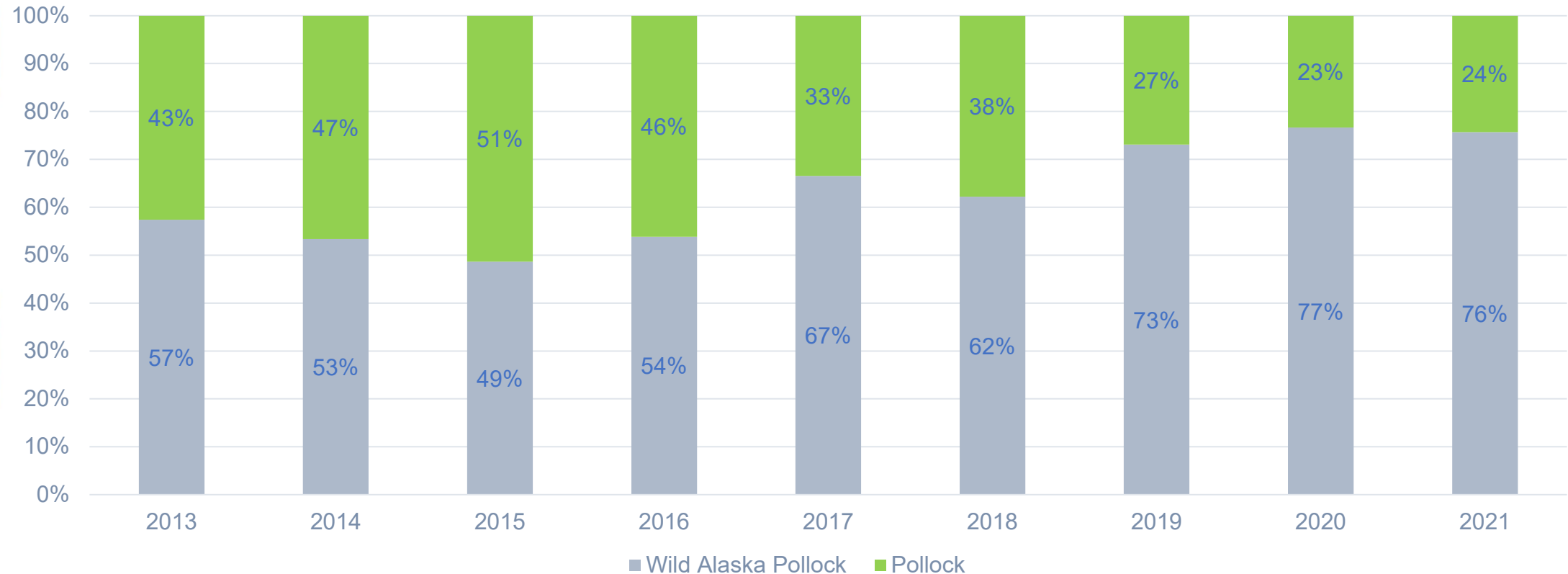
2020

- Shrimp 5.0
- Salmon 2.8
- Tuna 2.6
- Tilapia 1.07
- **AK Pollock/ Pollock 0.88**
- Cod 0.57
- Crab 0.52
- Catfish 0.52
- Pangasius 0.39

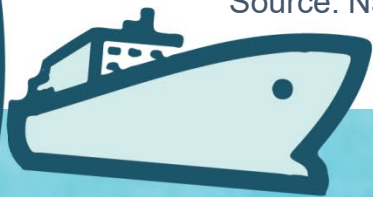
Source: National Fisheries Institute



Over the last 3 years, Wild Alaska Pollock has made up 75% of total Alaska Pollock/Pollock consumption



Source: National Fisheries Institute/GAPP

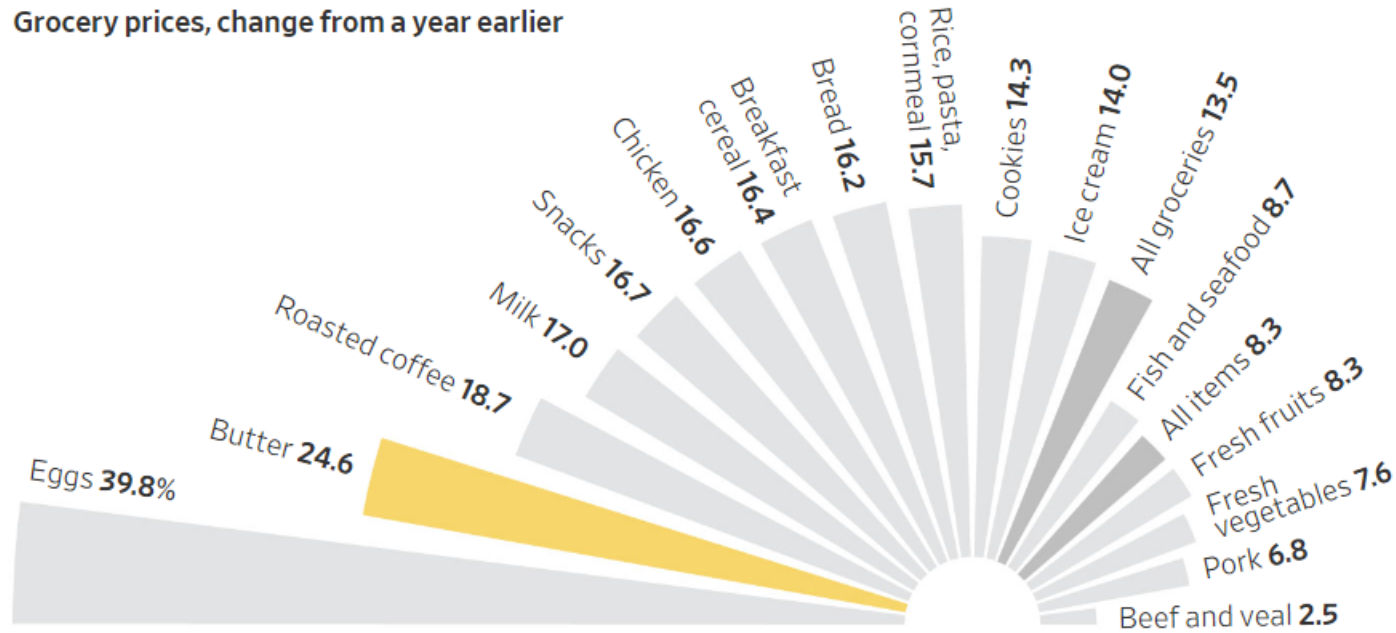


Prices of Wild Alaska Pollock vs. other land- based proteins



Overall, seafood cost increases in the past year have not matched those for chicken, dairy and eggs

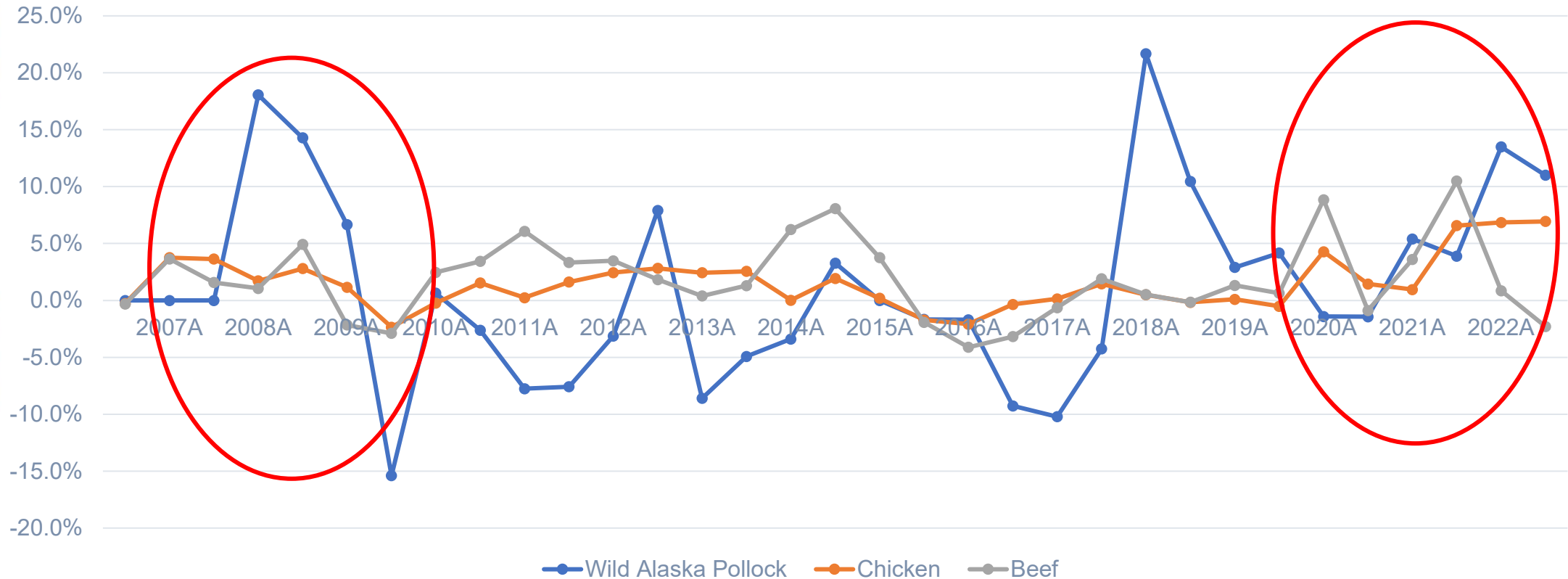
Grocery prices, change from a year earlier



Note: As of August 2022.
Source: Labor Department
Jemal R. Brinson/THE WALL STREET JOURNAL



Price competition with other proteins is different in 2022 vs. 2008-2009 supply shock



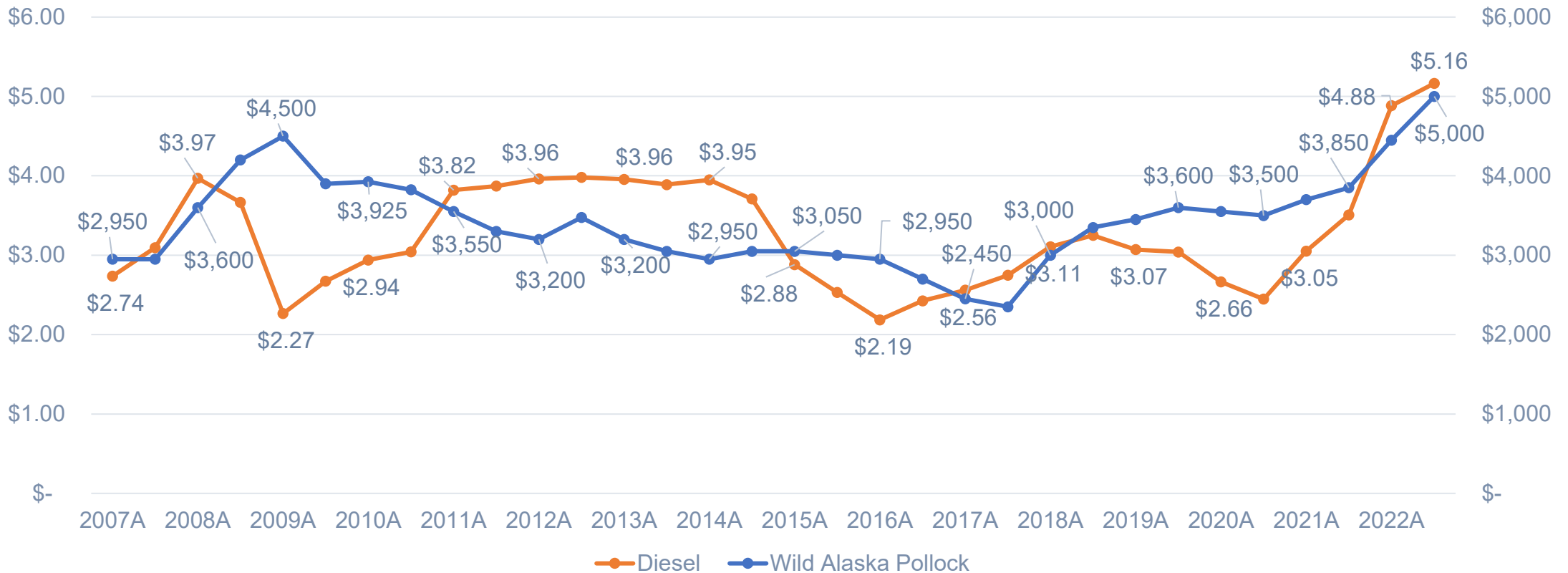
Sources: US Dept. of Labor/Undercurrent News



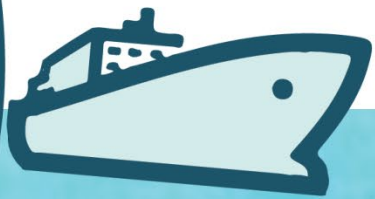
Production costs in Wild Alaska Pollock fishery



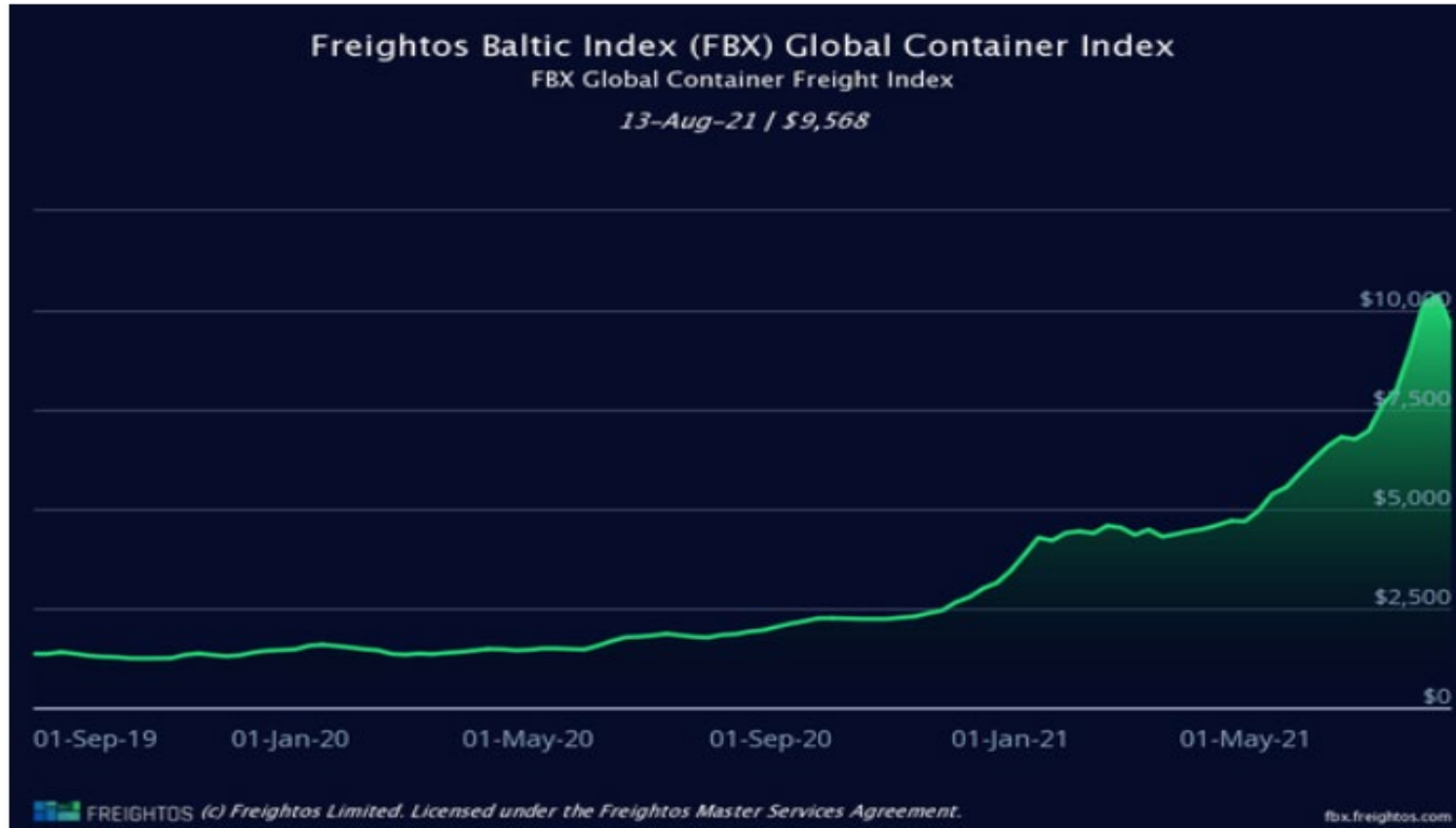
Diesel costs matching the increases in Wild Alaska Pollock fillet prices



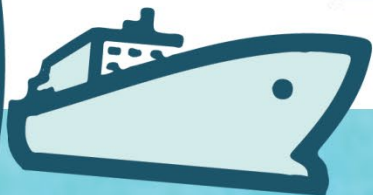
Source: U.S. Energy Information Administration/Undercurrent News



Ocean freight costs soared 466% in 2021 and has largely held those increases in 2022



Source:FBX



U.S. Protein Market Update

October 2022

Jana Dombrowski, Senior Vice President
jana.dombrowski@wellsfargo.com

What's Happening in the Protein Industry?

Protein Food Inflation Starts to Slow

- The Consumer Price Index in August showed prices flat from the previous month for U.S. meat, poultry, fish prices
- Prices for beef, pork and fish each declined from the previous CPI Food Report
- Only poultry and eggs saw a month over month increase
- Total meat, poultry and fish prices were up 13.5% from year ago levels¹
- Supply constraints, rising input costs and labor shortages remain challenges for the industry

Poultry Lawsuits

- Ongoing lawsuits concerned with product price fixing involve most major poultry companies
- Liabilities are varied, but potentially significant
- Settlements from various companies have been announced over the last 9 months, but many cases are yet-to-be-determined

Meat Packing Concentration in the Hotseat

- The Biden administration has taken focus on the packer concentration, especially beef packing

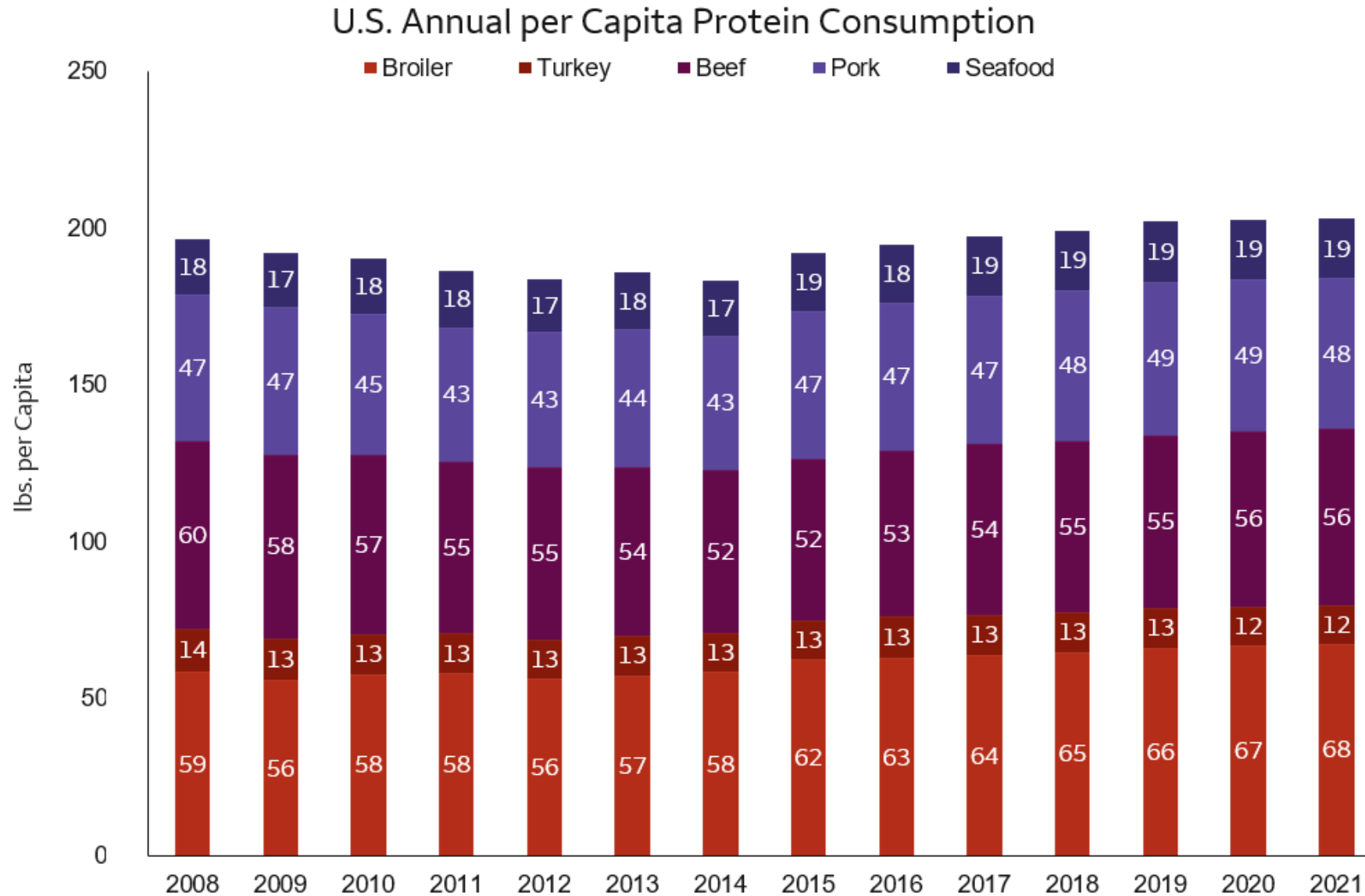
Sustainability Focus

Highly Pathogenic Avian Influenza (HPAI) Strikes Again

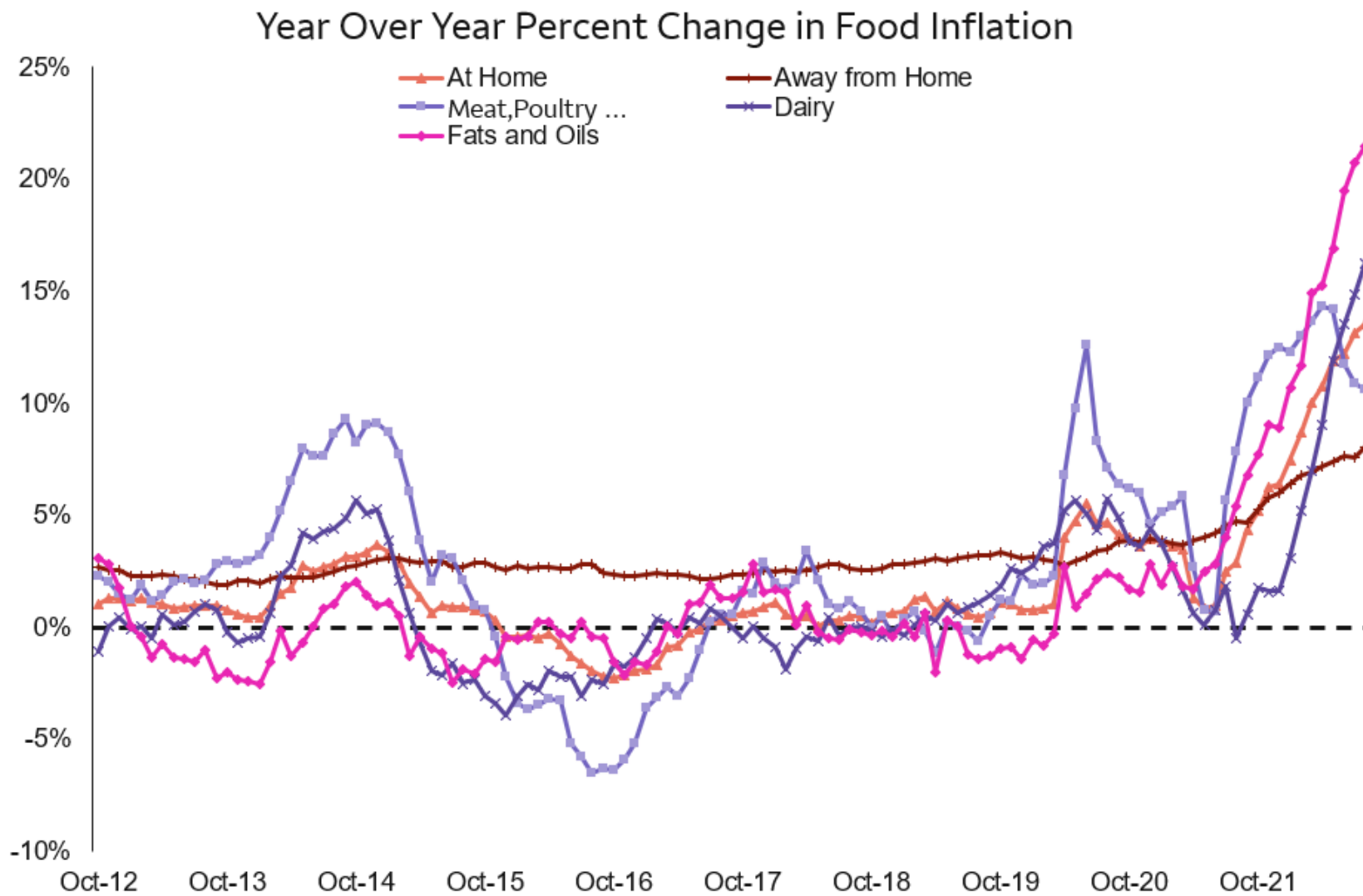
- Over 46.65M U.S. birds impacted by HPAI in 2022²
- **Table egg layers** hit the hardest with over 34.8M birds impacted² with roughly 9% of the table egg layer flock lost to HPAI³
- **Turkey** industry also highly impacted with over 6.4M birds²
- An estimated 3% of the flock has been impacted³
- Impact on **broiler** industry has been more **limited**
- Prices elevated across the poultry complex



U.S. Per Capita Protein Consumption Steady in 2021



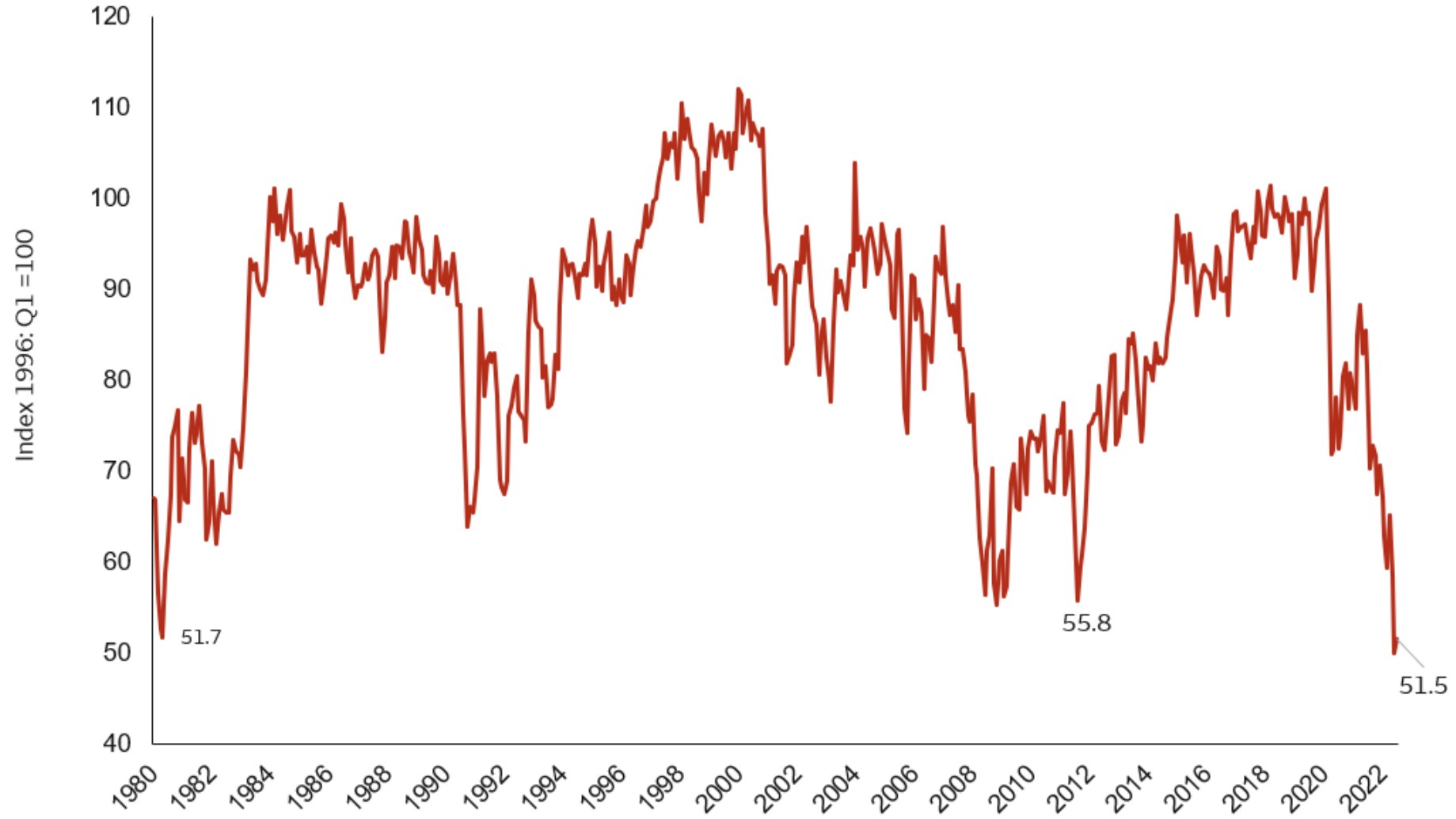
Meat and Poultry Food Inflation Slows; Other Food Inflation Climbs



Source: BLS August 2022 Release

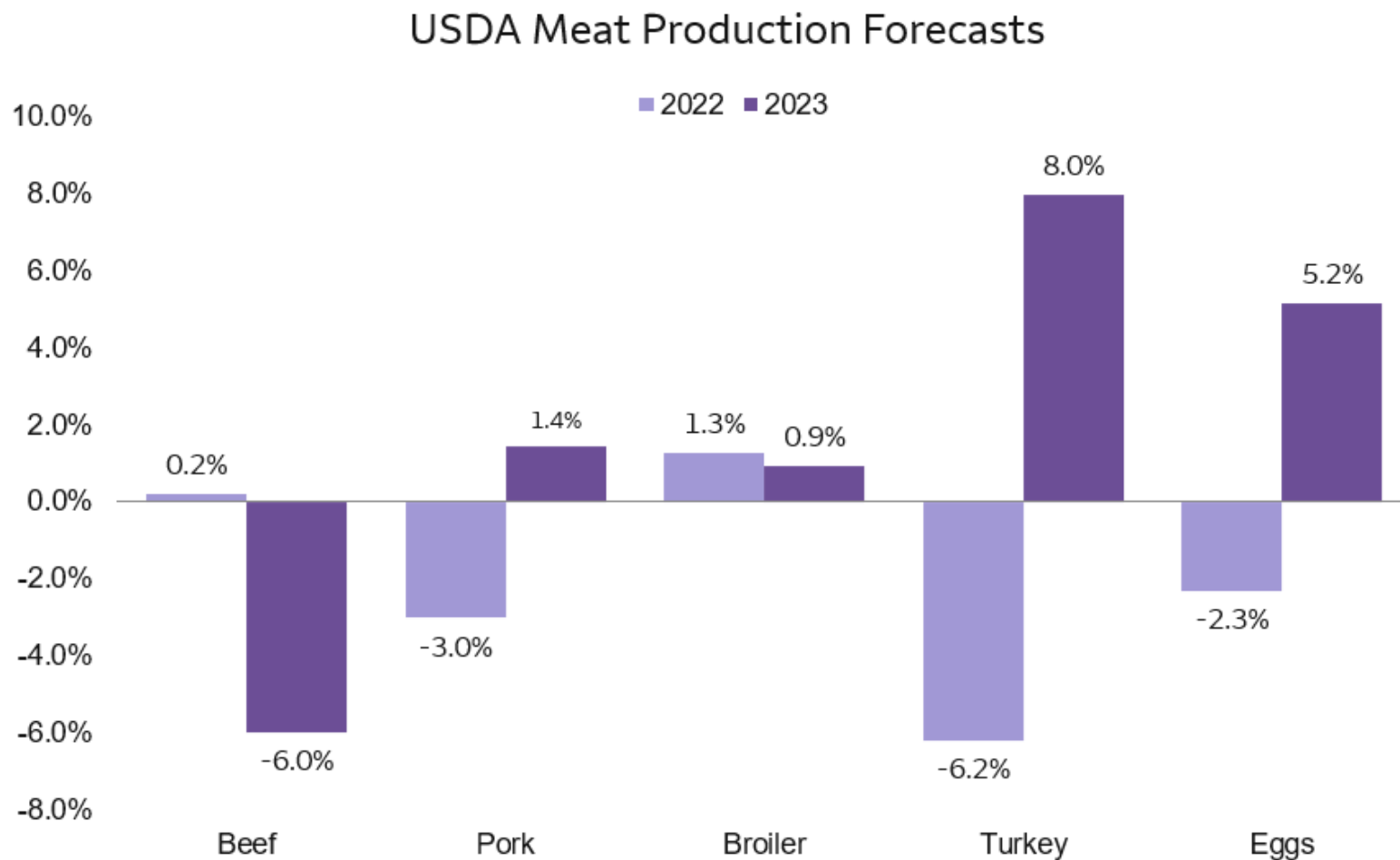
Consumer Sentiment Sinks to Lowest Level in 40 Years

Domestic U.S. Consumer Sentiment
Monthly, Index Year 1996 = 100

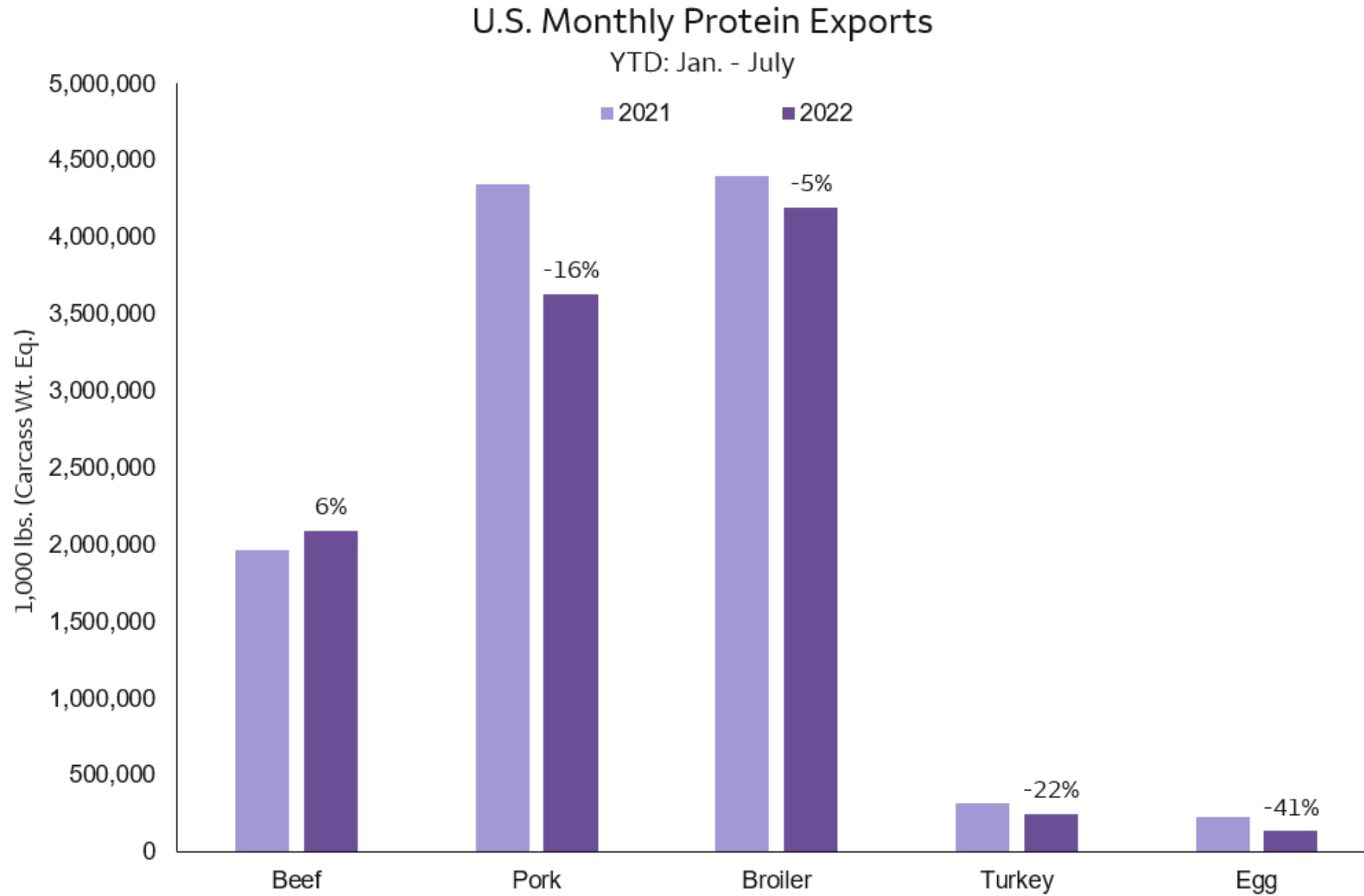


Total Meat and Poultry Production Forecast to Decline in 2022 and 2023

- Total meat and poultry estimated by USDA to slightly decline -0.5% in 2022 and -0.4% in 2023



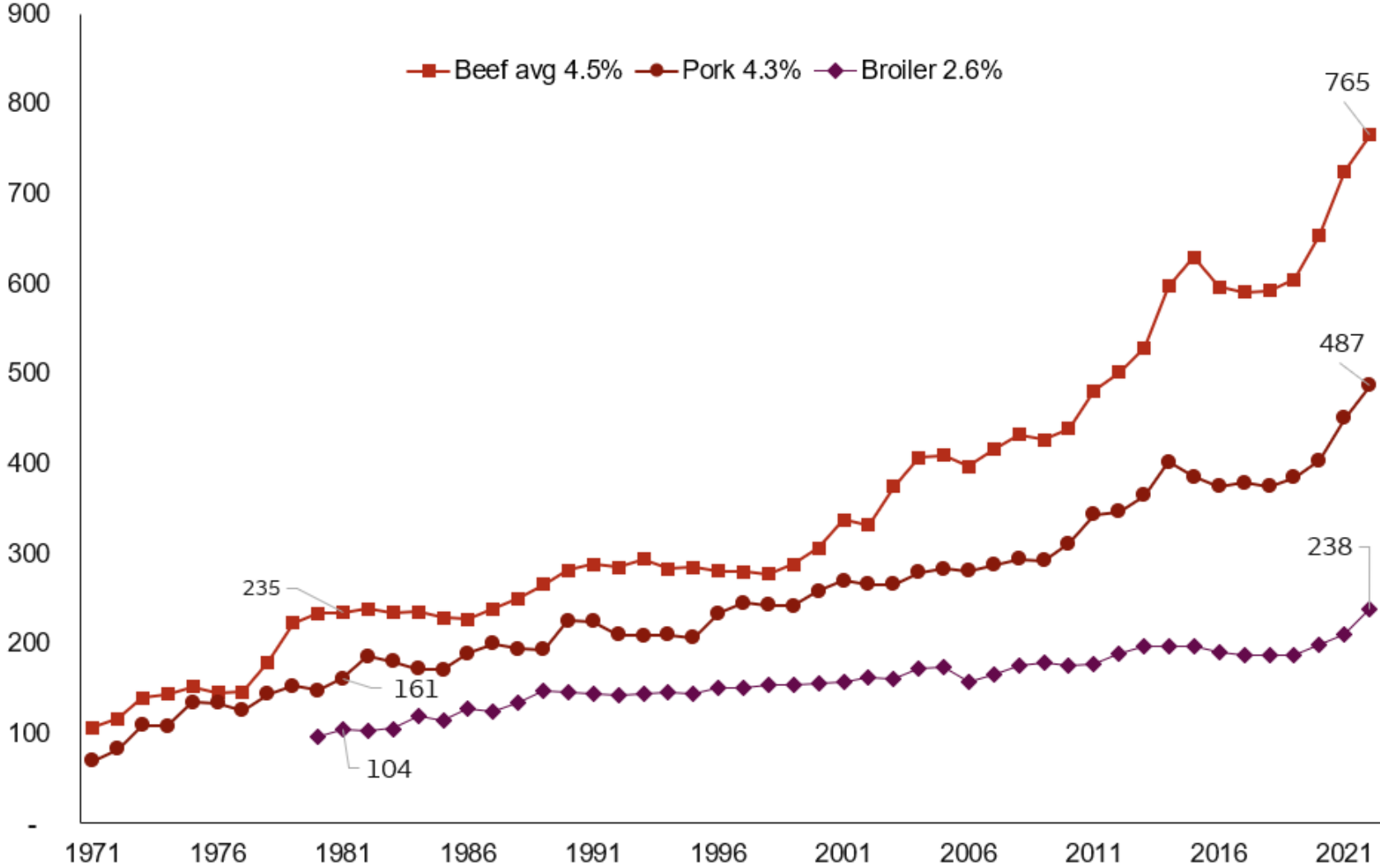
Export Pace in 2022



Commodity Prices

Beef Premium Strengthens

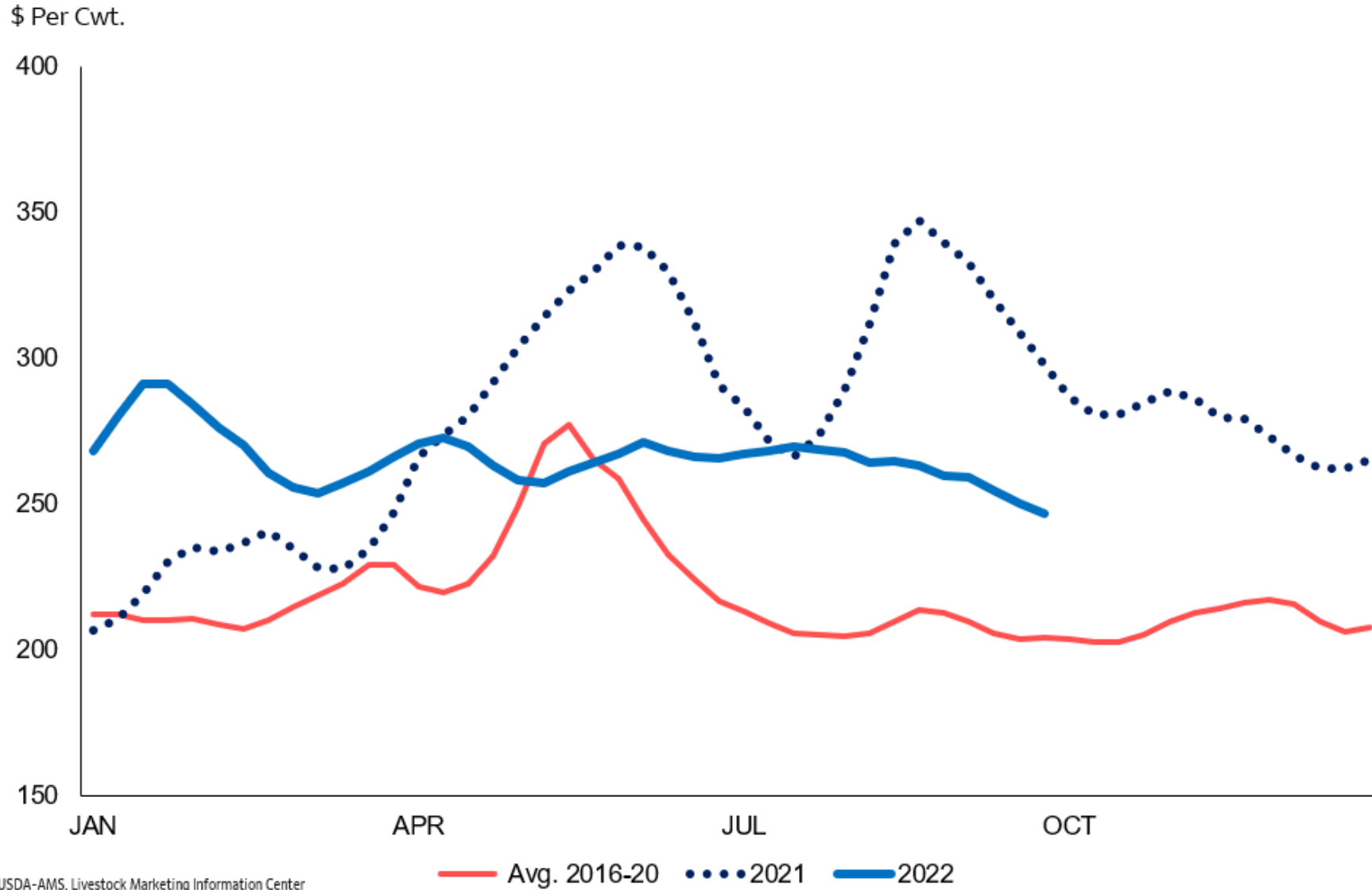
Retail Price: Cents per lb.
(Average Inflation Since 1980) Through August 2022



Source: USDA, Wells Fargo

Beef Cutout Prices

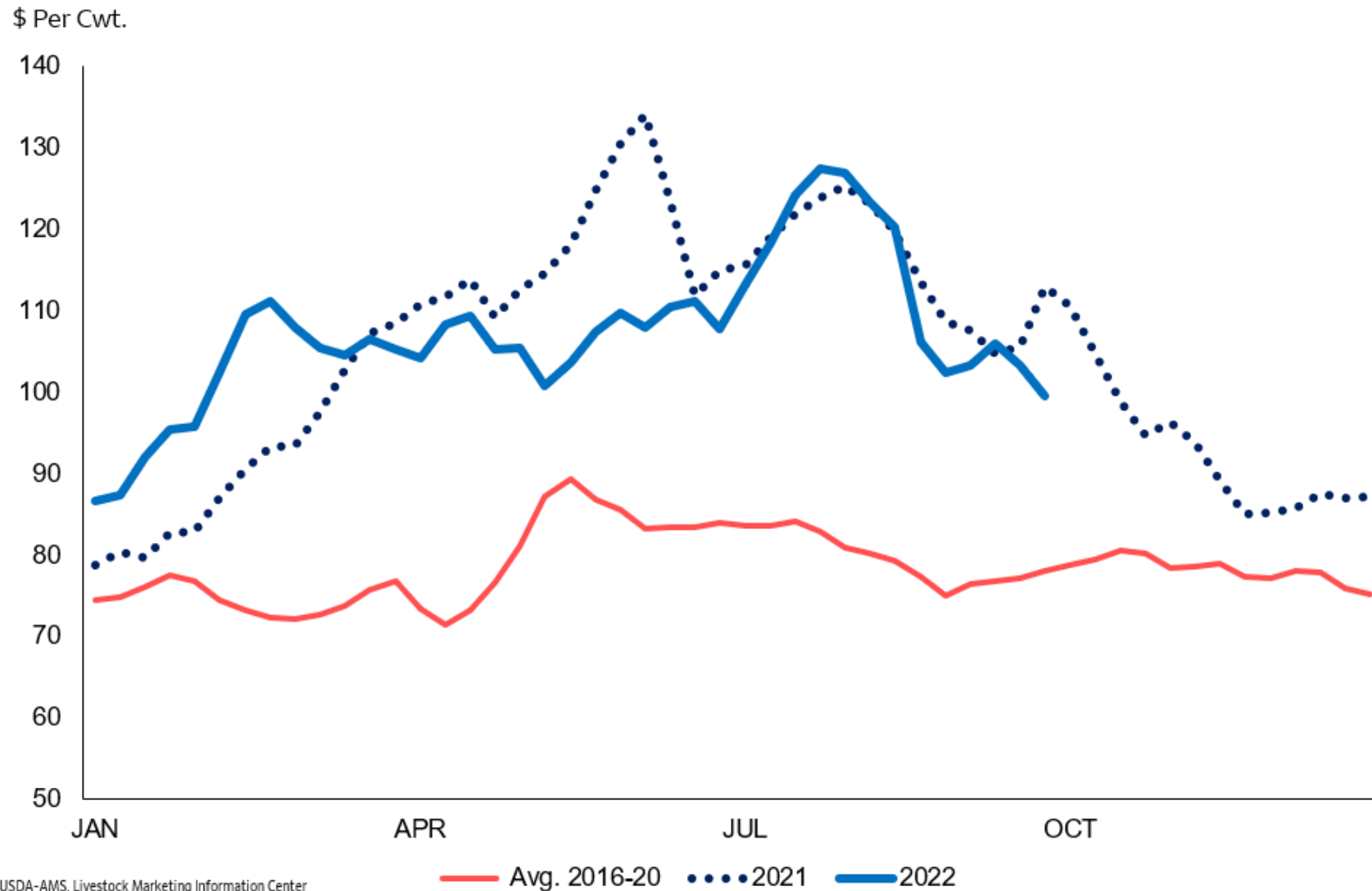
Boxed Beef Cutout Value
Choice 600-900 lbs., Carcass, Negotiated, Weekly



Source: USDA-AMS, Livestock Marketing Information Center

Pork Cutout Prices

Pork Cutout Value
FOB Plant, Negotiated, Weekly

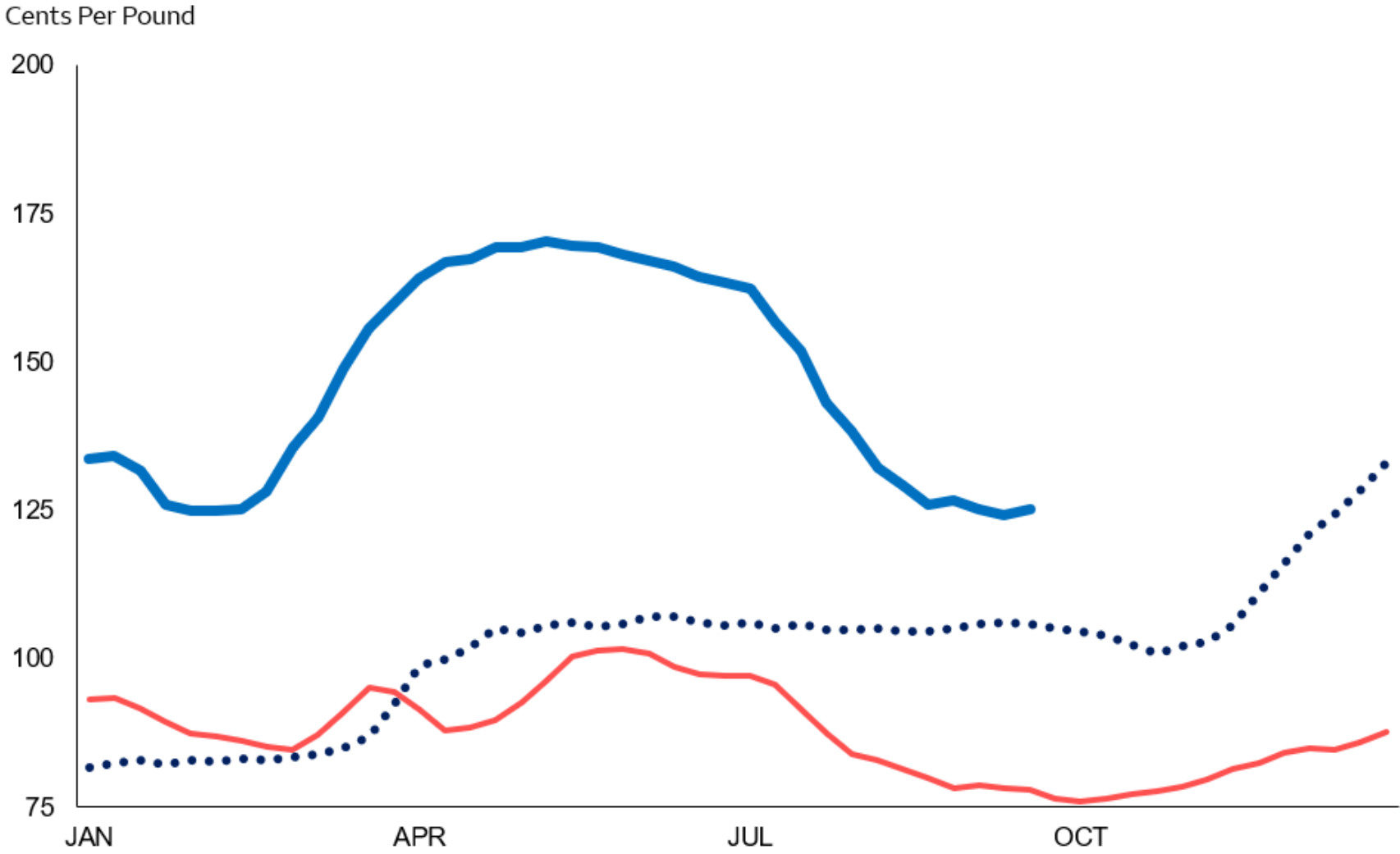


Source: USDA-AMS, Livestock Marketing Information Center

Broiler Prices

Broiler Prices

Whole Chickens, National Composite



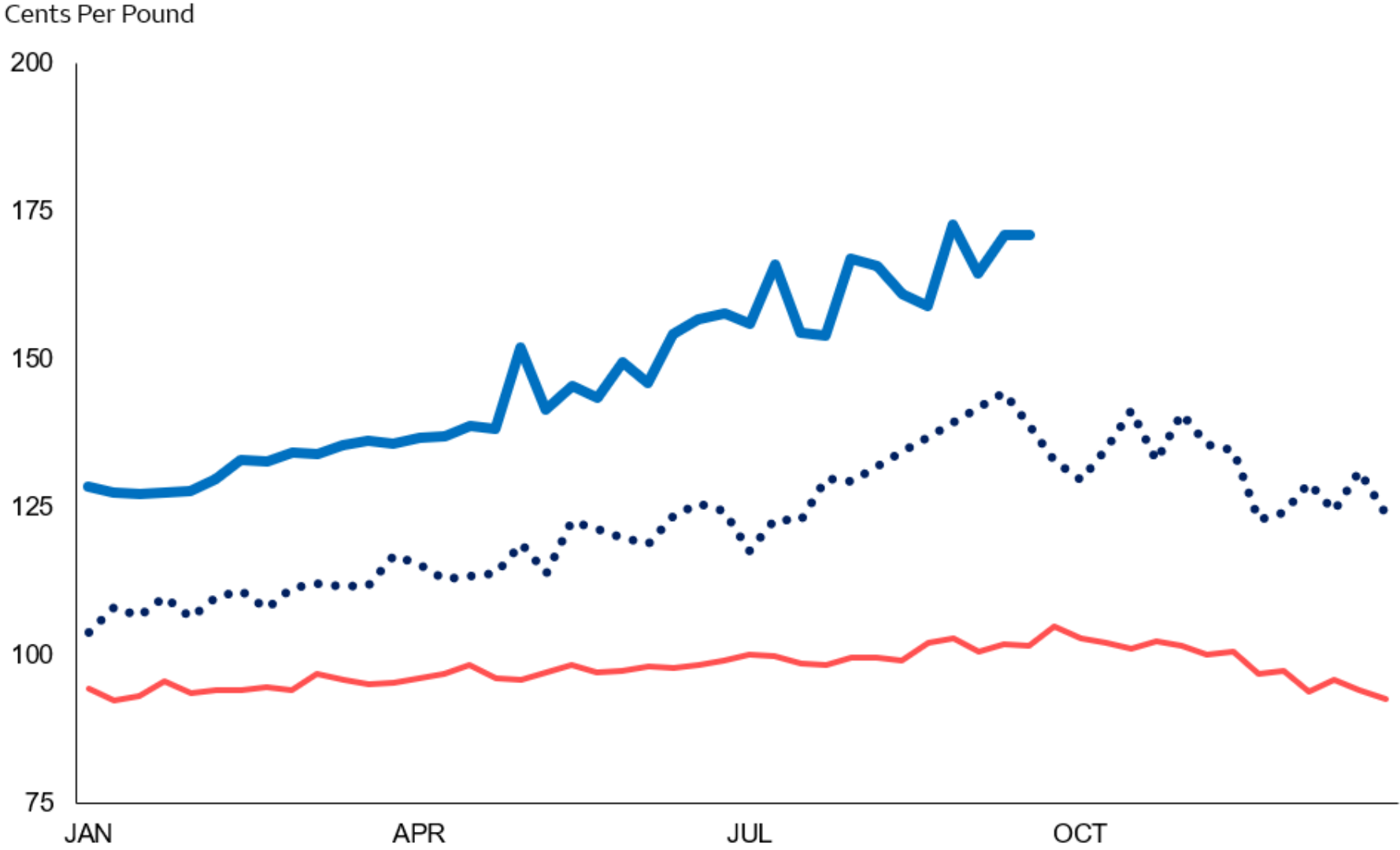
Source: USDA-AMS, Livestock Marketing Information Center

— Avg. 2016-20 ••••• 2021 — 2022

Turkey Prices

Turkey Prices

National, Whole Hen, 8-16 Pounds, Weekly



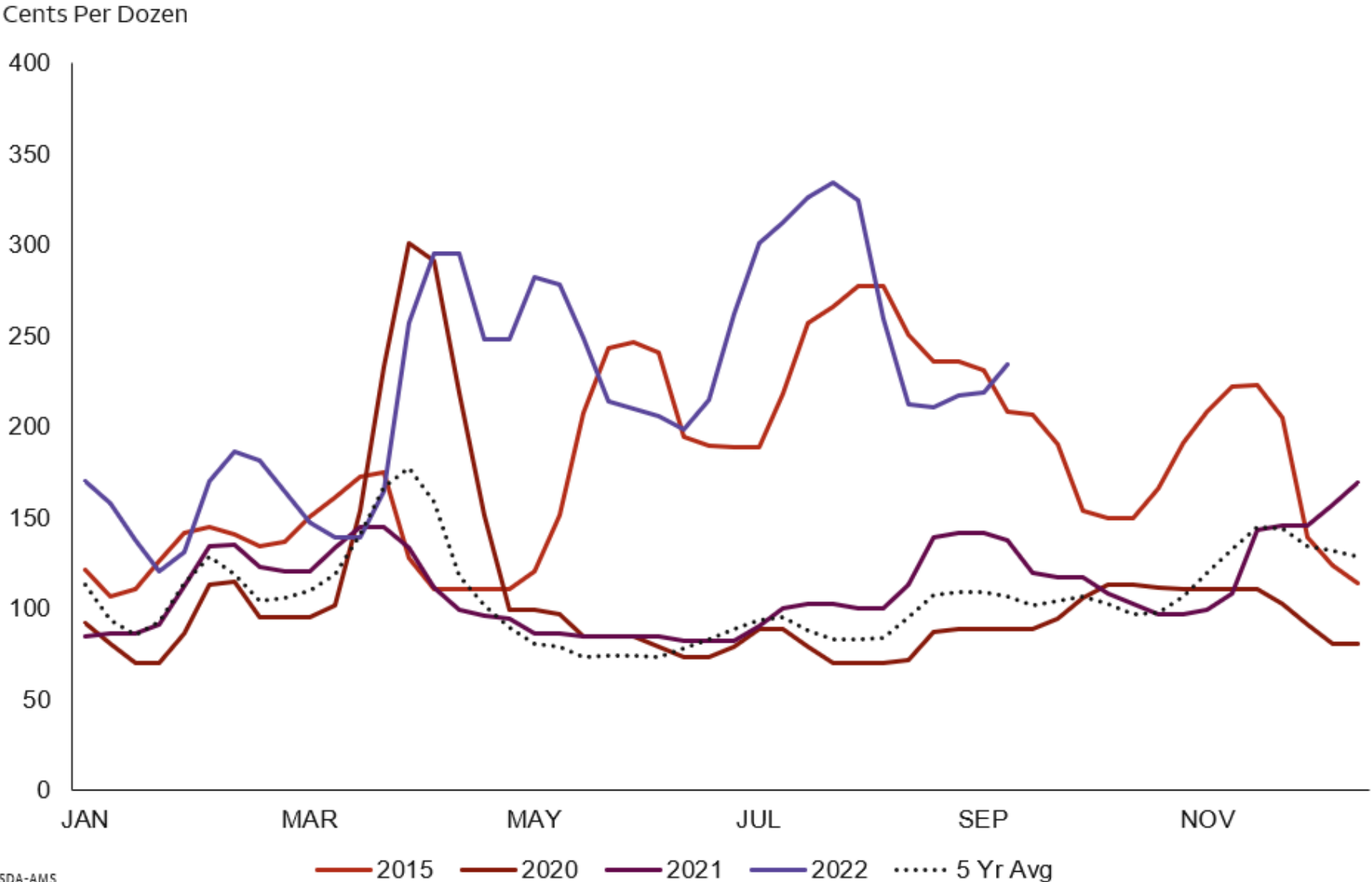
Source: USDA-AMS, Livestock Marketing Information Center

— Avg. 2016-20 ••• 2021 — 2022

Table Egg Prices

Weekly Wholesale Egg Prices

Combined Regional, Grade A Large, Delivered to Warehouse



Source: USDA-AMS

Meat Processors - 2nd and 3rd Quarter 2022 Earnings

Publicly Released Data

	Tyson (Beef, Poultry, Pork, Further processing) 3 rd Q earnings Released: August 8, 2022		Pilgram's Pride (Poultry) 2 nd Q earnings Released: July 28, 2022		Sanderson Farms, Inc. (Poultry) 2 nd Q earnings Released: May 31, 2022		Hormel Foods (Further processing) 3 rd Q earnings Released: September 1, 2022	
Net Sales	↑	\$13.5B 8% Y/Y	↑	\$4.6B 36.1% Y/Y	↑	\$1.54B 36.0% Y/Y	↑	\$3.0B 5.9% Y/Y
Net Income	→	\$753.0M 0.0% Y/Y	↑	\$362.0M 317.4% Y/Y	↑	\$321.1M 231.0% Y/Y	↑	\$218.8M 23.8% Y/Y
Operating Margin		7.7%		11.1% (All operations) 15.6% (U.S. operations)		27.0%		9.6%
Highlights:	Plans to open 12 new plants globally by 2024 <u>Operating margin by segment:</u> <ul style="list-style-type: none"> Beef: +10.7% Pork: +1.5% Chicken: +6.3% Prepared Foods: +7.6% 		<ul style="list-style-type: none"> Foodservice business improved Y/Y, achieving levels higher than pre-pandemic, while retail volumes remained strong Margins continued to improve, especially on the commodity large bird deboning operation, despite higher input and operating costs and less than optimal mix due to the significant labor shortages 		<ul style="list-style-type: none"> CGC Ventures and Cargill completed the acquisition of Sanderson Farms after a year of DOJ antitrust probing for \$4.5B on July 22, 2022 Limited impact from HPAI to flocks War in Ukraine impacting feed costs 		<u>Profit by segment:</u> <ul style="list-style-type: none"> Refrigerated Foods: (5.3%) Grocery Products: +15.6% Jennie-O Turkey: +537.3% International: (9.2%) 	

Meat Processors - 2nd Quarter 2022 Earnings

Publicly Released Data

	Beyond Meat (Meat Alternative) 2 nd Q earnings Released: August 11, 2022		Maple Leaf (Canadian –Poultry, Pork, Further processing, Meat alternatives) 2 nd Q earnings Released: August 4, 2022 Note: Canadian Dollars		JBS SA (Brazilian -Beef, Poultry, Pork, Further processing) 2 nd Q earnings Released: August 11, 2022	
Net Sales	↓	\$147.0M (1.6%) Y/Y	↑	\$1.2B 3.1% Y/Y	↑	\$17.5B 7.7% Y/Y
Net Income	↓	(\$97.1M) (394.8%)Y/Y	↓	(\$54.6M) (722.4%) Y/Y	↓	\$760M (9.8%) Y/Y
Operating Margin		(61.0%)		2.0%		8.3%
Highlights:	<u>Revenue by U.S. segments:</u> <ul style="list-style-type: none"> U.S. Retail: \$78.9M U.S. Foodservice: \$23.4M 		<ul style="list-style-type: none"> Gross profit was negatively impacted by COVID-19 operational and supply chain disruptions, inflationary cost increases and higher feed costs, partially offset by pricing action 		<u>Net revenue by U.S. segments:</u> <ul style="list-style-type: none"> USA Beef: +2.7% USA Pork: +4.2% Pilgrim's Pride: +27.3% 	

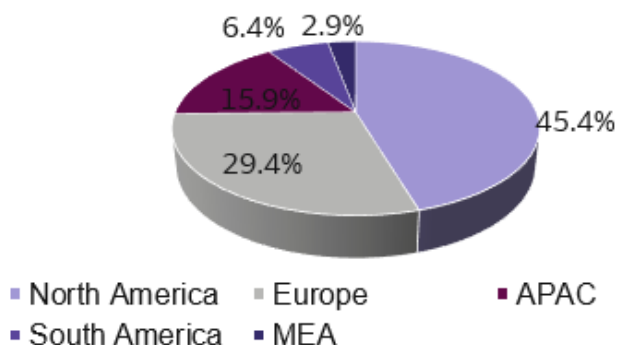
Alternative Proteins

Alternative Protein Market Outlook

Sector

- Alt protein sources include soy, peas, grains, nuts, insects, mycoproteins (fungi) and cultured meat (animal cells)
- The soy and pea-based sources are the most competitively priced, at \$5.50 and \$11.50 per pound¹
- Today, it is estimated it costs over \$375 to grow a single burger patty out of animal cells¹
- The largest six meat companies in the US—including JBS, Tyson and Cargill—have all invested in alternative protein companies and/or launched their own product lines

Regional Market Share¹



Market Leaders



Source: ¹ McKinsey & Co., ² Kearney Industry Report, ³ BCG, ⁴ Good Food Institute, ⁵ Credit Suisse

Important Trends



Long-Term Growth

- Alternative protein makes up 2-3% of the protein category today²
- Alt proteins could grab an 11% share from the global protein market by 2035, totaling \$192B with a 12% CAGR³
- Largest catalysts include public concern for health, adoption by food service and retail



Recent Stumbles

- In the first half of 2022 alt protein companies have raised \$1.75B, a modest reduction from 2021⁴
- Stock prices of market leaders like Beyond Meat and Tattooed Chef down 86.1% and 72.8% respectively (as of 9/30/22)



Government Involvement

- Regulators abroad have been pushing alternative protein by subsidizing investments and penalizing animal farmers with taxes
- U.S. House Appropriations Committee, with an annual discretionary budget of \$1.5T, called for parity in research funding for alt protein companies to combat climate change

2021 Alternative Protein Breakdown²



	Invested Capital	Liquidity Events
Plant Based	\$1.9B	\$2B
Fermented	\$1.7B	\$9.3M
Cultivated	\$1.4B	\$18.6M

**WELLS
FARGO**

 Food and Agribusiness
Industry Advisors

Thank you

Wells Fargo Food and Agribusiness

<https://www.wellsfargo.com/com/industry/food-and-agribusiness/>

Food For Thought Newsletter

<https://global.wf.com/food-for-thought>

General Disclosure

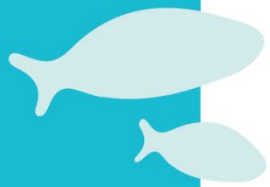
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Perfection in Plain Sight: Selling Surimi Seafood to Health Professionals

Chris Rich, Vice President, Eat Well Global





Perfection in Plain Sight: Selling Surimi Seafood to Health Professionals

Chris Rich, VP



Eat Well Global



The “State of Nutrition”

- At the end of September 2022, the FDA released a proposed ruling on the definition of “healthy”, as it pertains to limits of dietary cholesterol.
 - *“Because seafood is a nutrient-dense food, provides important nutrients, and is specifically recommended by the Dietary Guidelines, 2020-2025, for inclusion in a healthy dietary pattern, we consider that it is appropriate for these foods to meet the updated “healthy” criteria.”*
 - *For these reasons, we are not proposing to include a limit on dietary cholesterol as part of the updated criteria for “healthy.”*
- This proposal is currently open for public comment (90 days) but, if finalized, this would be a great opportunity for continued innovation around convenient Genuine Alaska Pollock products that meet the healthy definition.



The “State of Nutrition”

- On September 28th, 2022, the Biden administration held a White House Conference on Hunger, Nutrition, and Health.
- The purpose of the conference was to catalyze action for the millions of Americans struggling with food insecurity and diet-related diseases like diabetes, obesity, and hypertension.
- Five “Pillars of Action” were introduced:
 1. Improve Food Access & Affordability
 2. Integrate Nutrition & Health
 3. Empower consumers to make and have access to healthy choices
 4. Support physical activity for all
 5. Enhance Nutrition and Food Security Research



What is the Opportunity?

During the White House conference:

- Registered Dietitians and Nutritionists (RDNs) were highlighted several times in the strategy document as change agents at retail, as well as important resources for all health professionals.



RDNs are the best opportunity for engagement and the best product for them to promote is surimi.



What GAPP & Eat Well Global Has Done

NUTRITION FOCUSED RESEARCH – Q3 2021

Purpose:

- Help to identify key patient groups to whom Registered Dietitians (RDs) were recommending Wild Alaska Pollock and what the key drivers were for these recommendations.



Methods and Results:

- Worked with Today's Dietitian to send a survey to 14,000 patient-facing nutrition experts (RDs).
- Responses from 300 RDs
- Results showed that RDs who recommend the product are most likely to recommend to adults.
- 91% of these RDs would recommend surimi.
- 48% of the RDs who completed the survey met face-to-face with more than 20 patients per week and are **considered key purchasing behavior influencers among consumers.**



What GAPP & Eat Well Global Has Done

KEY OPINION LEADER INTERVIEWS – DECEMBER 2021

- The project objective was to map HCP perception, awareness, and knowledge of Wild Alaska Product and its product forms with RDs of identified consumer target audiences
- Selection of eight(8) RDs representative of key demographics; including general / family, pregnancy / women's health, pediatric, and older adult specializations.
- Criteria for RD selection included credentials, area of expertise, seafood recommendations (identified through their social profiles), an established social media following, and availability.
- Questions included, but were not limited to:
 - Do RDs that recommend seafood recommend pollock?
 - What do RDs think of the available pollock product forms?
 - What can GAPP provide to RDs to facilitate pollock product recommendation?

[Seafood] like a nutritional supplement because it packs so much nutrition...

Women's Health

I don't specifically mention WAP but may bring pollock up as an [alternative] to other fish.

Pediatric

[Low Mercury levels] is why I specifically recommend WAP over pollock in general.

Women's Health



What GAPP & Eat Well Global Has Done

KEY OPINION LEADER INTERVIEWS – KEY TAKEAWAYS

- RDs do not recommend Wild Alaska Pollock, unless they have been previously educated on its Unique Selling Points (USPs).
- Individual preference, taste, affordability and convenience were consistently mentioned as key properties that affect both RD recommendation rates of Wild Alaska Pollock and seafood in general.
- General agreement about the relevance of life-specific messaging as an enabler for seafood adherence.



Eat Well Global's Knowledge

- Eat Well Global has 16 Registered Dietitians and 3 Registered Nutritionists on staff, with over 280 years of combined professional experience.
- In 2022, Eat Well Global continued our commitment to helping global change agents in health and nutrition stay up-to-date with constant changes in the industry with the “**HCP Voice**”.
- The HCP Voice surveyed **350 healthcare professionals** across the US to hear about their priorities and opinions towards health and nutrition information, learning experience, and patient interaction.



Findings from the “HCP Voice”

Why the best opportunity for engagement is with RDNs



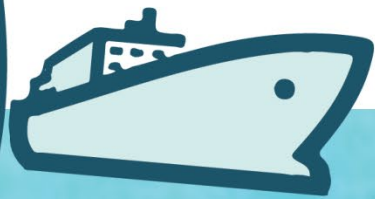
Trust in RDNs is at an all-time high

TRUST FROM CONSUMERS

- Registered Dietitians and Nutritionists are the **most frequently consulted health professionals** for nutrition and healthy eating information¹
- They are the most trusted source of information about which foods to eat or avoid, with **23% of people having more trust in dietitians since COVID-19**²
- 43% of Healthcare Professionals claim they deliver **food and nutrition recommendations more frequently since COVID-19**⁴
- 77% of global consumers declare that **the advice of dietitians and nutritionists impacts which foods they buy**³

Sources:

1. International Food Information Council (IFIC) Foundation's 2022 Food and Health Survey
2. IFIC COVID-19 US Consumer research, May 2020
3. Eat Well Global, The Consumer Voice Report: Global Insights on Food, Trust, Nutrition and Influencer, November 2020
4. Eat Well Global, US Health Care Professionals Survey, June 2022



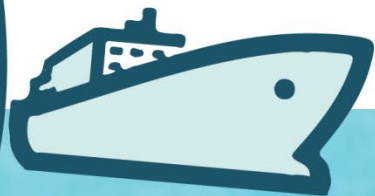
Trust in RDNs is at an **all-time high**

TRUST WITHIN THE PROFESSION

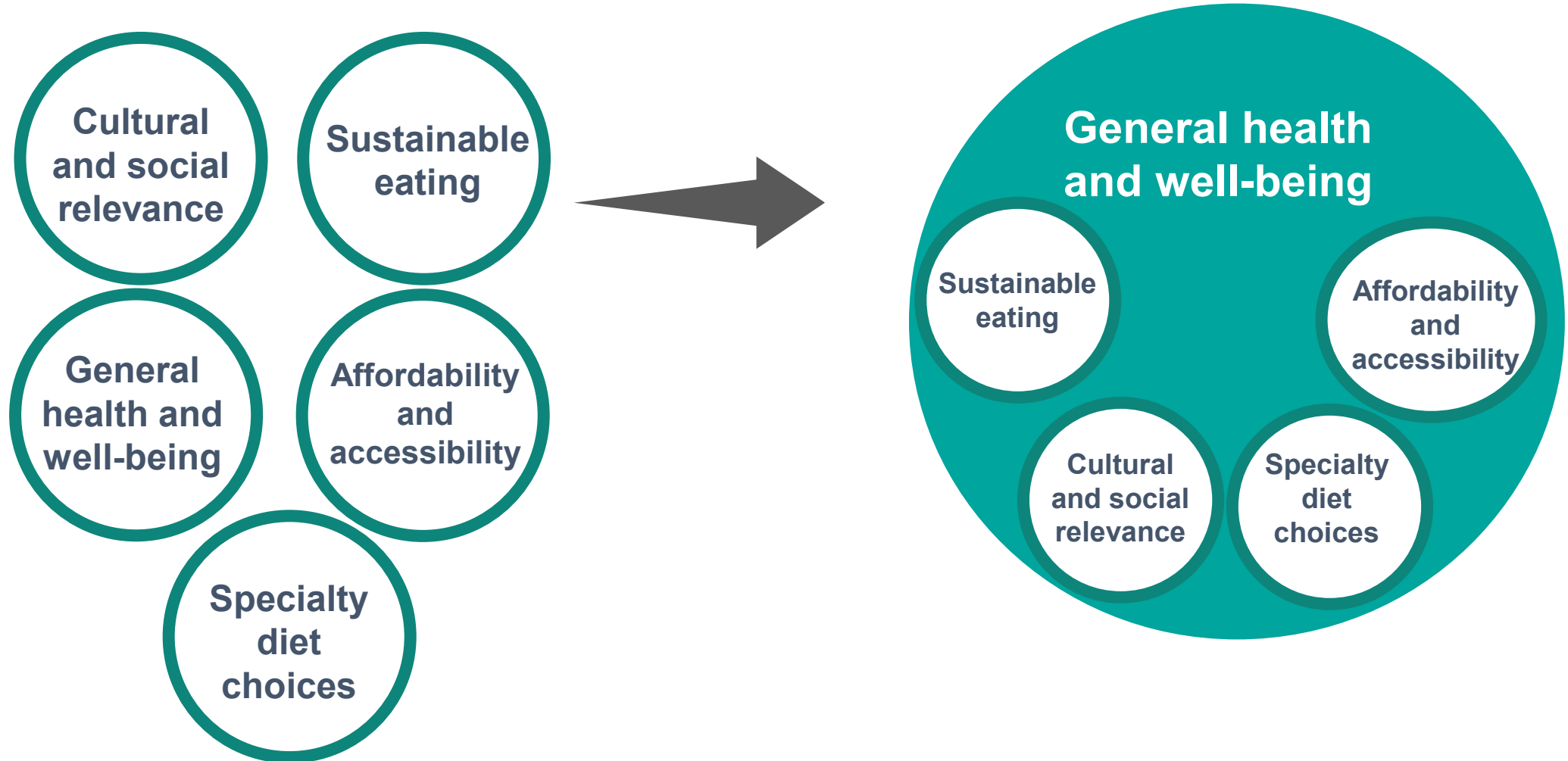
- RDNs (62%) are the **third most used source of information** by HCPs to keep informed about food and nutrition, after Professional Associations (69%) and Academia (67%)⁴
- **79% of HCPs refer their patients** and clients to Registered Dietitians and Nutritionists⁴
- **94% of RDNs use other RDNs** as food & nutrition sources of information⁴

Sources:

1. International Food Information Council (IFIC) Foundation's 2022 Food and Health Survey
2. IFIC COVID-19 US Consumer research, May 2020
3. Eat Well Global, The Consumer Voice Report: Global Insights on Food, Trust, Nutrition and Influencer, November 2020
4. Eat Well Global, US Health Care Professionals Survey, June 2022



To drive appeal and engagement of societal and environmental issues



Turning Insights into a Focused Message

- Taking these gained insights, we have tailored an executable Message Map to ensure message resonance and relevance in alignment with GAPP's nutrition & accessibility story.
- Message Maps are tailored towards two audience groups (general HPs and Retail Dietitians).
- Message Maps contain a core message and overarching themes which can be utilized in current and future engagement opportunities.
- **Overall, the message is that surimi, in addition to being perfection in plain sight, is the seafood for everyone.**



Core Message:

Wild Alaska pollock surimi is the seafood for everyone

Wild Alaska pollock seafood surimi provides:

IMPROVED DIET QUALITY

- Surimi is part of a nutritious and balanced eating pattern, providing vitamins and minerals lacking in the standard American diet, like vitamin B12, vitamin E, selenium, and phosphorus.
- Surimi is an excellent source of high-quality protein, containing all nine essential amino acids and is low in calories and fat, making it an appropriate addition to any diet.
- Add surimi to well-loved recipes for a protein punch and a convenient way to meet the Dietary Guidelines for Americans' recommendation of two servings of seafood per week.

ACCESSIBLE NUTRITION

- Surimi products are a convenient and accessible protein, pre-cooked and ready to use from your local seafood provider.
- From the wild waters of Alaska to your local seafood provider, surimi is the surprising, sustainable seafood ingredient you have been missing.
- Verified by a Life Cycle Assessment, surimi has a significantly lower carbon footprint than many other proteins, including beef, chicken, and plant-based options.

LIMITLESS POSSIBILITIES

- Introducing a variety of high-quality protein options like surimi early and often is the best practice to help children build acceptance of various flavors and foods.
- High-quality protein supports active aging needs, making surimi an excellent protein choice for older adults.
- Surimi is a low-mercury seafood option, making it a safe choice for children and pregnant women.

GAPP MESSAGE MAP – RETAIL DIETITIAN INCLUDED

Core Message:

Wild Alaska pollock surimi is the seafood for everyone

Wild Alaska pollock seafood surimi provides:

IMPROVED DIET QUALITY

- Surimi is part of a nutritious and balanced eating pattern, providing vitamins and minerals lacking in the standard American diet, like vitamin B12, vitamin E, selenium, and phosphorus.
- **Surimi is a flavorful, nutritious form of wild Alaska pollock and a perfect pairing with vegetables and whole grains, two under-consumed food groups.**
- Surimi is an excellent source of high-quality protein, containing all nine essential amino acids and is low in calories and fat, making it an appropriate addition to any diet.
- Add surimi to well-loved recipes for a protein punch and a convenient way to meet the Dietary Guidelines for Americans' recommendation of two servings of seafood per week.

ACCESSIBLE NUTRITION

- Surimi products are a convenient and accessible protein, pre-cooked and ready to use from your local seafood provider.
- **Marinate, bake, grill, or serve it fresh; surimi is easy to prepare as a main course or added to your favorite side dish.**
- From the wild waters of Alaska to your local seafood provider, surimi is the surprising, sustainable seafood ingredient you have been missing.
- Verified by a Life Cycle Assessment, surimi has a significantly lower carbon footprint than many other proteins, including beef, chicken, and plant-based options.

APPROACHABLE FLAVOR

- **Surimi is a versatile seafood ingredient that comes in a variety of forms, like sticks, chunks, shreds, or flakes.**
- **Surimi is a mild-tasting seafood option that substitutes easily for fresh seafood in your favorite recipes.**
- **Surimi seafood mimics crab, lobster, shrimp, and scallops and is made from cooked, mild flavored, and lean, wild Alaska pollock.**

LIMITLESS POSSIBILITIES

- Introducing a variety of high-quality protein options like surimi early and often is the best practice to help children build acceptance of various flavors and foods.
- High-quality protein supports active aging needs, making surimi an excellent protein choice for older adults.
- Surimi is a low-mercury seafood option, making it a safe choice for children and pregnant women.
- **When families need a quick and easy meal on the table, surimi is an affordable, nutritious, and easy-to-prepare seafood option.**



How These Messages Can Be Utilized

- Baseline topics and talking points for retail dietitians to reference and utilize as a part of in-store activation efforts.
- Shared core message and themes as focal points for learning in collaborative opportunities with credible dietitian associations.
- Assist dietitians in introducing terms and talking points with their patients to create a more positive perception of surimi.
- Drive the demand of surimi and Wild Alaska Pollock by using gained knowledge from consumer analytics and combining these core message and themes with determined drivers of consumption.



Thank You



THANK YOU SPONSORS!



Wild, Natural & Sustainable®





**Global
Seafood**
ALLIANCE™

Thank you!



North to Alaska with Holland America

Kacy Cole, Holland America; Megan Rider, Alaska Seafood Marketing Institute; Susan Marks, Responsible Fisheries Management Program



NORTH TO ALASKA WITH HOLLAND AMERICA



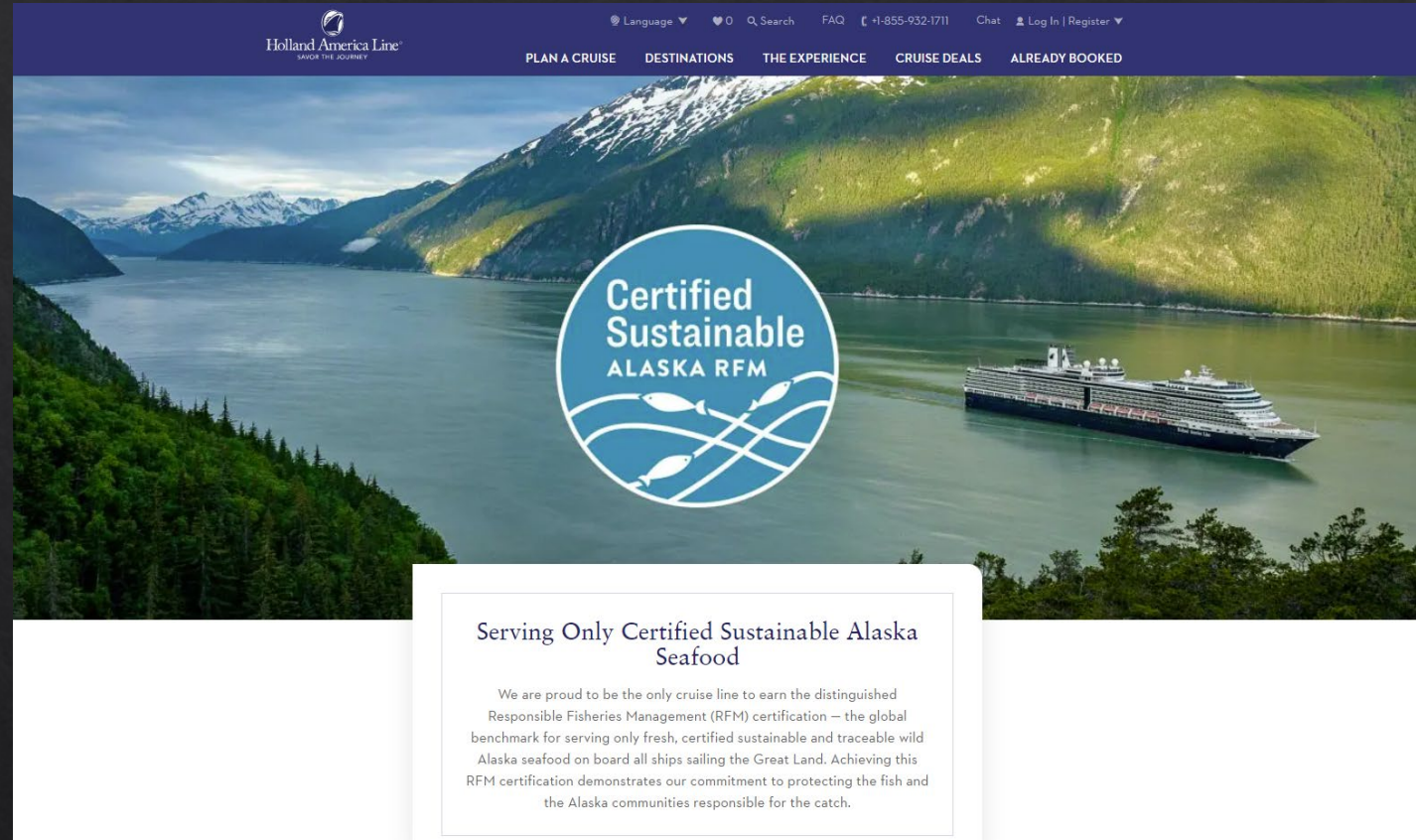
PROUD TO BE THE FIRST & ONLY CRUISE LINE SERVING CERTIFIED SUSTAINABLE ALASKA SEAFOOD



We're proud to be the first and only cruise line to ever be certified by Responsible Fisheries Management (RFM). RFM provides credible standards for sustainable, responsible fishing and supply chain traceability. This globally recognized benchmark serves as proof of our commitment to serving only fresh, sustainable and traceable wild Alaska seafood on board our ships.



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SAVOR THE JOURNEY

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Serving Only Certified Sustainable Alaska Seafood

We are proud to be the only cruise line to earn the distinguished Responsible Fisheries Management (RFM) certification – the global benchmark for serving only fresh, certified sustainable and traceable wild Alaska seafood on board all ships sailing the Great Land. Achieving this RFM certification demonstrates our commitment to protecting the fish and the Alaska communities responsible for the catch.

ASMI PARTNERSHIP VIDEO



HOLLAND AMERICA LINE IS THE FIRST CRUISE LINE TO SERVE ONLY **FRESH**, CERTIFIED **SUSTAINABLE** ALASKA SEAFOOD WITH **TRACEABLE** ORIGINS ON ALL ALASKA VOYAGES



NORTH TO ALASKA WITH HOLLAND AMERICA



ALASKA'S FIVE PILLARS OF SUSTAINABILITY



FAMILIES &
COMMUNITIES



FISHERIES
MANAGEMENT



RESOURCE
UTILIZATION




SOCIAL
RESPONSIBILITY



CERTIFICATION

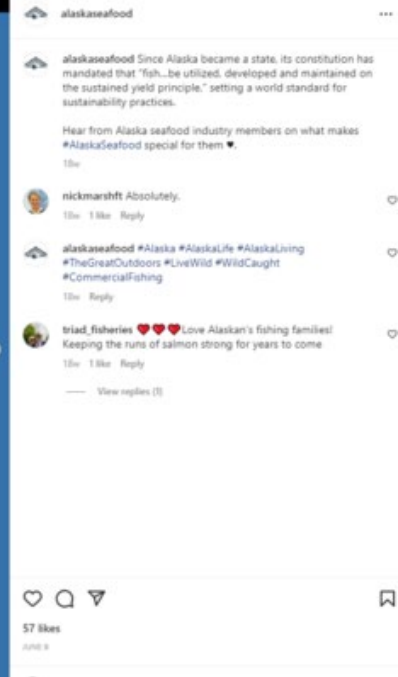



INDUSTRY VOICES TALK ABOUT ALASKA SUSTAINABILITY



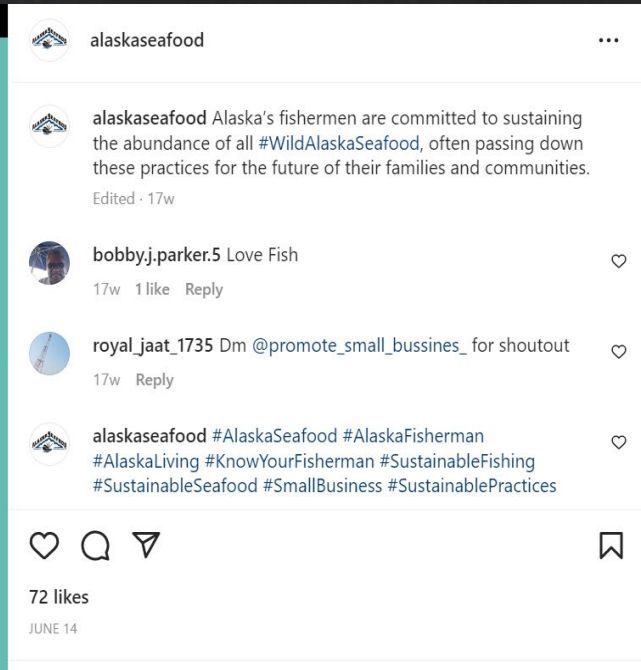

Alaska seafood is harvested from a pristine habitat by people who care about ensuring seafood consumers have the best product available.

Forrest Bowers
Deputy Director, Alaska Department of Fish and Game
Division of Commercial Fisheries

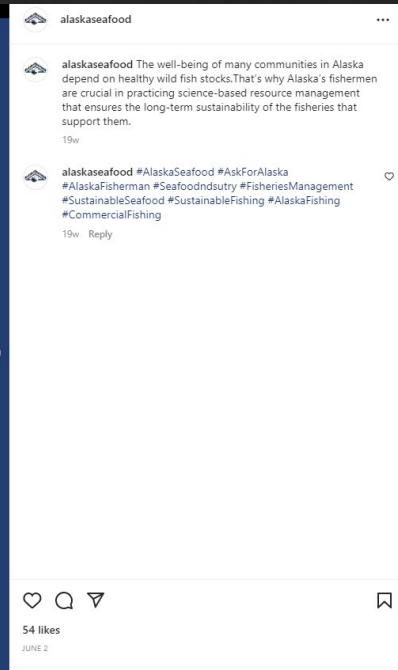
I have a big Native family full of fishermen who have a storied history in Bristol Bay. I bought my family business, and am looking forward to carrying on our line of fishermen through it.

Kenneth Gross
Bristol Bay Family Fisherman
Tlingit, Athabaskan, Aleut

The community and our customers depend on us being able to keep harvesting fish for years to come.

Seth and Anna Stewart
Pelican, AK Processors



OUTDOOR CHEF KENA PEAY VISITS ALASKA



alaskaseafood Original audio

alaskaseafood The #AlaskaSeafood industry is all about resource utilization. That's why @fishwineski taught @kenapeay how to use every part of her #AlaskaSalmon. Check out their tips on how to get 100% out of your fish. 17w

kennyfi5711 15w 1 like Reply

senasea_seafoods So great! 17w 1 like Reply

traveljuneauk Powerful and important messages! Thank you for sharing with us. 17w 1 like Reply

sitkasalmonshares This is so great! Two wonderful humans. 17w 2 likes Reply

angieinalaska What are you doing about bycatch? 17w Reply

View replies (1)

aksalmonboys 17w 1 like Reply

kirkhardcastle_ 17w 2 likes Reply

Liked by Ilcornish and 245 others

JUNE 15

Add a comment... Post



alaskaseafood Original audio

alaskaseafood Goals: Cooking #WildAlaskaSablefish (black cod) in the Alaska wilderness. 17w

See how @KenaPeay makes her hot honey sablefish while visiting Alaska. Edited · 21w

sadietalia She's amazing, I love her videos. 18w Reply

jessiesfeedrd I just tried my first sablefish this week! Soooo good 20w 1 like Reply

Liked by alicetoothken and 151 others

MAY 20



kenapeay Paid partnership Original audio

kenapeay In Alaska with @alaskaseafood checking off my bucket list: eating the best seafood, taking a seaplane to one of Alaska's 12,000 rivers and learning about how all seafood from Alaska stays wild and sustainable through a science-based, hands-on approach. #AskForAlaska #ad

#explore #alaska #salmon #kingsalmon #reelitfeelit #reels #seafood Edited · 18w

fallomena 17w Reply

divaraw7 @kenapeay what an amazing adventure!!! 17w Reply

sarah.b.rad This is close to our dream trip. @tunde101. 17w Reply

jiz_mo I legitimately cried when I left Alaska after visiting last summer. Such a special place! Thank you for sharing your experience with us! Loved learning alongside you here. 17w 1 like Reply

wildgoosehair What an amazing trip and food! 17w Reply

jarieaswall Omgosh SO jealous! You stay living off my bucket list just rewatched a video I saved of yours from 2020 17w Reply

Liked by alaskaseafood and 795 others

JUNE 10

Add a comment... Post

GIANT EAGLE PODCAST FEATURES ALASKA FISHER 'WOMEN'

HEALTHY LIVING
BY GIANT PODCAST

Search About Episodes

Oct 14, 2022

It's National Seafood month which means it's a great opportunity to learn more about the fisherWOMEN who fish the cold waters of Alaska to bring sustainable seafood to Giant. Julianne Curry and Hannah Heimbuch share their insights on how women are changing the face of fishing through advocacy and leadership and what...

[Read More](#)

Alaska Seafood: Meet the FisherWOMEN

HEALTHY LIVING BY GIANT PODCAST
Alaska Seafood: Meet the FisherWOMEN

30 00:00:00 30

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NORTH TO ALASKA WITH HOLLAND AMERICA





The Power of Influence(rs)

Mary Elizabeth Germaine, Global Head of Analytics, Ketchum;
Deborah Henderson, Managing Account Supervisor, Ketchum

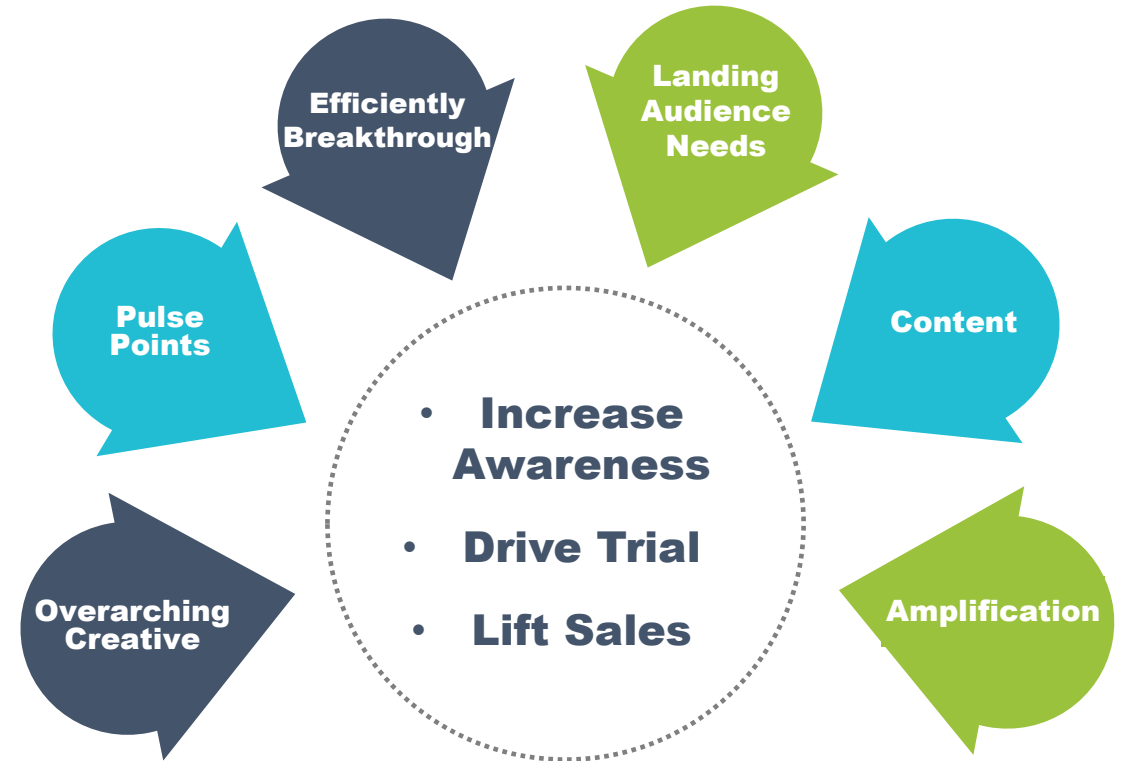


Campaign Objective

Year-over-year consumer research shows that the more consumers are familiar with Wild Alaska Pollock, the more they like it. As GAPP's initiatives work to increase awareness and familiarity of Wild Alaska Pollock, we see positive increase in perception as well.

Research also shows that consumers are increasingly relying on social media trends, as well as friends and family, for trusted information and recipe inspiration.

To capitalize on these insights, GAPP launched an integrated Awareness and Demand campaign – leveraging targeted influencer partners – with a focus on creating content that drives both **trial** and **awareness**.



Campaign Overview

Targeted influencer partnerships – vetted through Ketchum’s omniearnedID – were leveraged to create content that was tested to best resonate with audiences most likely to purchase Wild Alaska Pollock.

Two waves of content feature a variety of influencers who best deliver on engagement and awareness. Content was supported with paid amplification, as well as an earned media partnership.

JULY PULSE

- 1 celebrity chef influencer, 1-2 posts
- 1 macro influencer, 1 post
- 2 mid-tier influencers, 3-4 posts
- 2 micro influencers, 3-4 posts

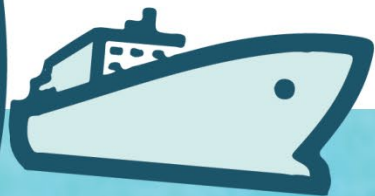
Paid Social Amplification

Earned Media Activation (National Broadcast STM)

JANUARY PULSE

- 1 celebrity chef influencer, 1-2 posts
- 1 macro influencer, 1 post
- 2 mid-tier influencers, 3-4 posts
- 2 micro influencers, 3-4 posts

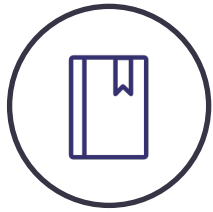
Paid Social Amplification



DATA DRIVEN APPROACH TO INFLUENCER MARKETING



By leveraging Ketchum's omniearnedID process, this campaign aims to not only **raise awareness and perception of Wild Alaska Pollock**, but to directly **lift sales** for member products. Built on Omnicom's people-based precision marketing and insights platform – OEID provides valuable, anonymized information about the individuals who are consuming and reacting to a brand's earned media and influencer content, and links them to measurable business impacts, such as sales and perceptions.



Plan

Use ID-based audience intelligence to determine & prioritize communications opportunities



Craft

Real-time and predictive data fuels content and messaging relevance and resonance



Execute

Ongoing optimization loop ensures campaign effectiveness and cross-channel impact



Measure & Attribute

Map earned and Influencer consumption to behavior and mindset change (perceptions or sales)



**Identifying
Influencers Who
Deliver the Right
Message to the
Right Audience**



INFLUENCER IDENTIFICATION PROCESS

Initial shortlist of 20 Influencers

Chosen based on influencer relevance (follower size, content focused on high quality recipes, an openness to seafood) and audience relevance (engagement rate, alignment with target audience)

Narrowed down to 10 influencers

Chosen based on their audiences' likelihood to purchase pollock and surimi vs. all audiences and the average dollars, units and purchase trips.

6 Influencers

1 macro, 3 mid-tier
2 micro



SELECTED PARTNERS

Celebrity Chef

Macro

Mid-Tier

Micro



Antonia Lofaso
[@chefantonia](#)
 323K IG followers



**Millennial
Flexitarians**

- Wild Alaska Pollock (Breaded/Frozen Fillet)
- Surimi



My Nguyen
[@myhealthydish](#)
 1.5M IG followers



**Millennial
Flexitarians**

- Wild Alaska Pollock (Breaded/Frozen Fillet)



**Fish-Friendly
Parents**



Valentine Thomas
[@valentinethomas](#)
 331K IG followers



**Millennial
Flexitarians**

- Wild Alaska Pollock (Breaded/Frozen Fillet)
- Surimi



Angela J Kim
[@mommydiary](#)
 275K IG followers



**Fish-Friendly
Parents**

- Wild Alaska Pollock (Breaded/Frozen Fillet)



Angelica Castaneda
[@angelicacastaneda](#)
 46K IG followers



**Fish-Friendly
Parents**

- Wild Alaska Pollock (Breaded / Frozen Fillet)



Taku
[@outdoorcheflife](#)
 58K IG followers

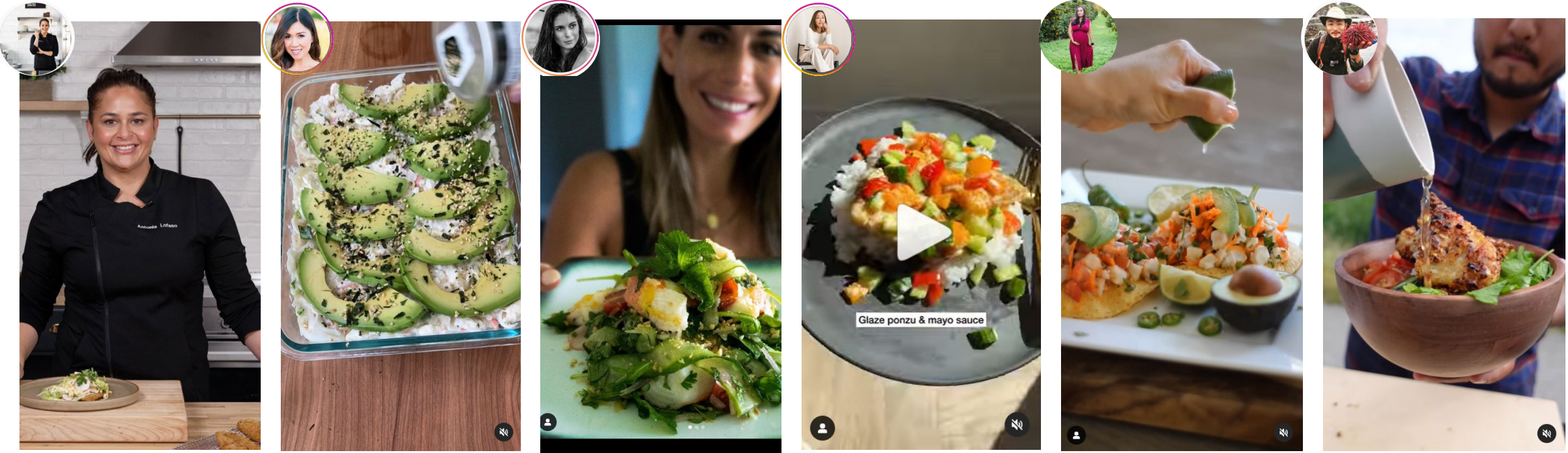


**Millennial
Flexitarians**

- Wild Alaska Pollock (Breaded / Frozen Fillet)
- Surimi



HIGHLIGHTS

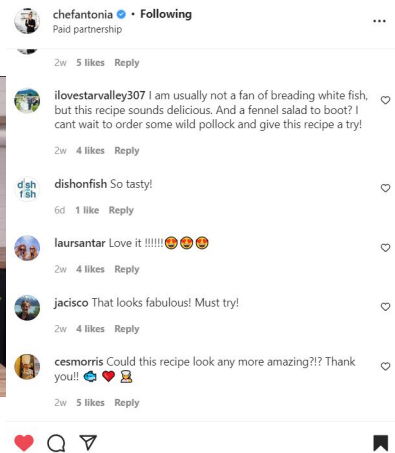
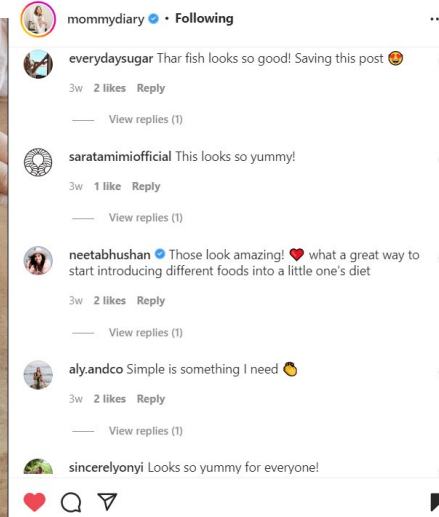


In just one month, the Awareness and Demand campaign achieved a total of **21** social posts featuring a diverse range of **10** on-trend recipes. Content was amplified across social channels, achieving over **14M** impressions and over **12K** clicks to GAPP's *'Where To Buy'* landing page.



Campaign Sentiment

Overall post engagement achieved **49K** post likes, **1K** post comments, and over **1.03M** engagements (likes, saves, shares, views).

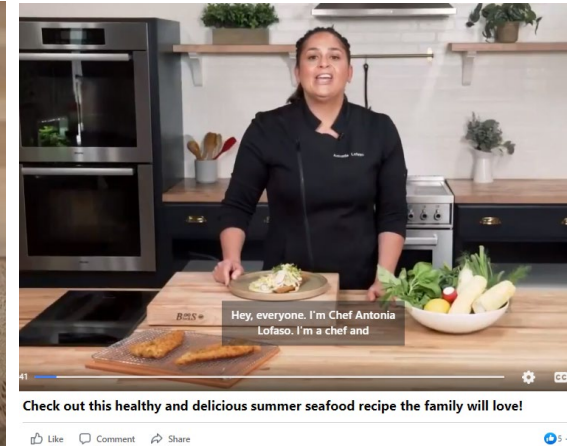


SMT (National Broadcast)

The team also spent a day in the kitchen with Chef Antonia Lofaso, showcasing Wild Alaska Pollock's unique differentiators and how easy it is to cook with our favorite fish. Content aired across broadcast achieving **12.8M** impressions across major national markets. Chef Antonia also posted an IGTV segment on her social channel, which achieved **1.3M** impressions.



CHEF ANTONIA LOFASO
Executive Chef & Restaurateur



Performance Results



SHOWING IMPACT

By comparing two similar groups over the same time period, with the only difference being...



People who saw the campaign content
(exposed group)

Compared
to

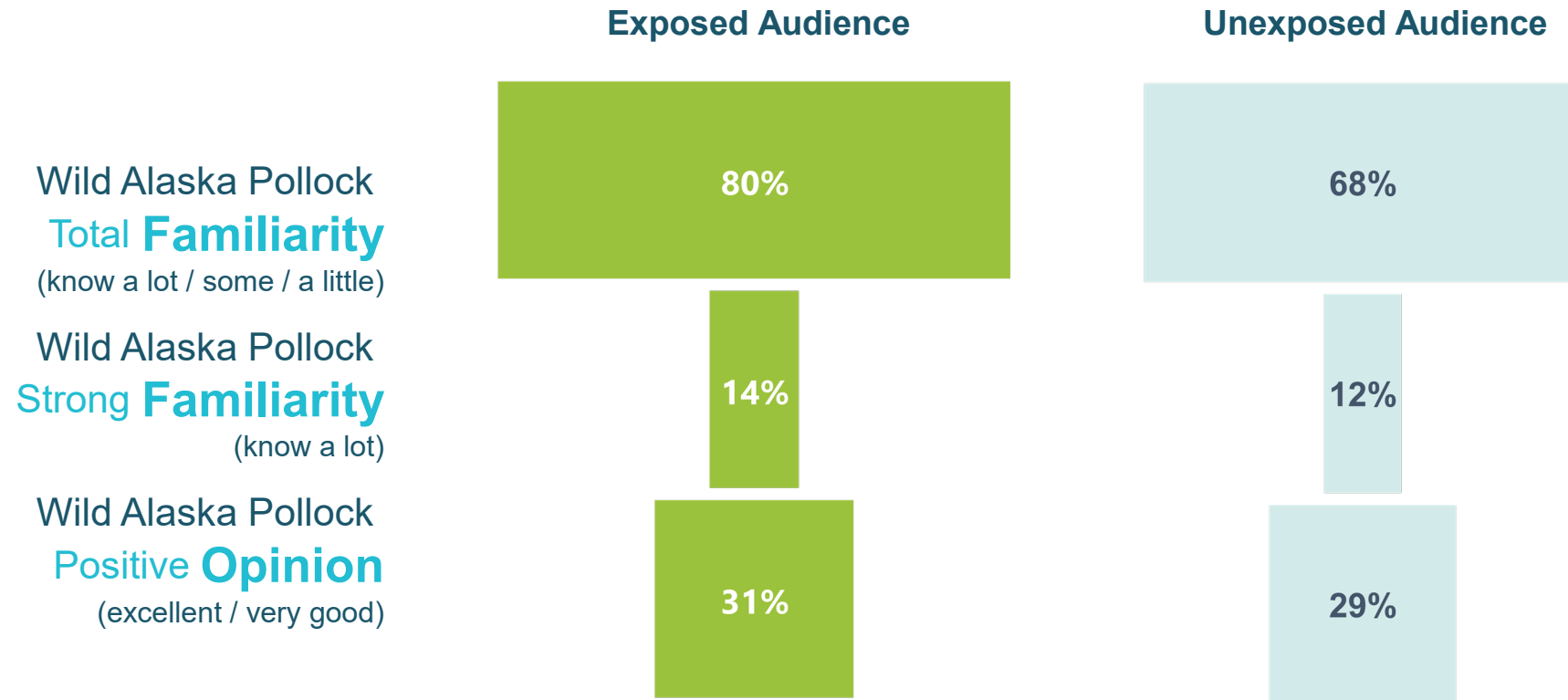


People who did not see the campaign content
(control group)

Key metrics:

- Product awareness and familiarity
- Product perception
- Retail purchase

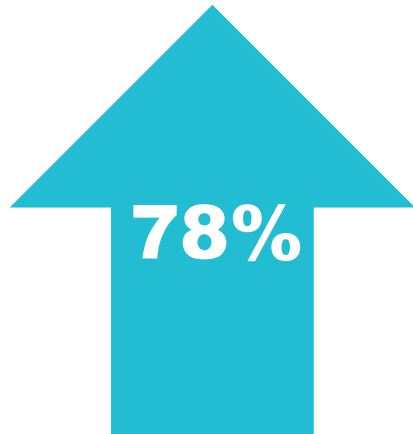
FIRST ROUND OF INFLUENCER CONTENT SUCCESSFULLY INCREASED WILD ALASKA POLLOCK FAMILIARITY AND PERCEPTION



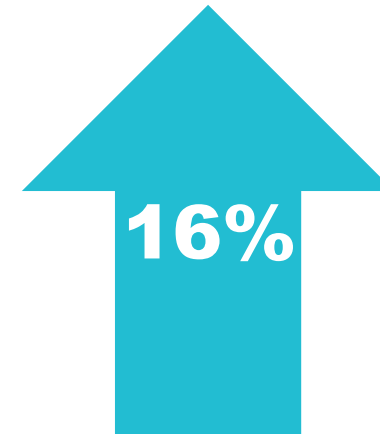
CONTENT HAS ALSO DRIVEN CONVERSION IN RETAIL



The influencer components of the campaign prompted a 78% lift in Wild Alaska Pollock and a 16% lift in surimi purchases among people who saw the campaign vs. those that did not.



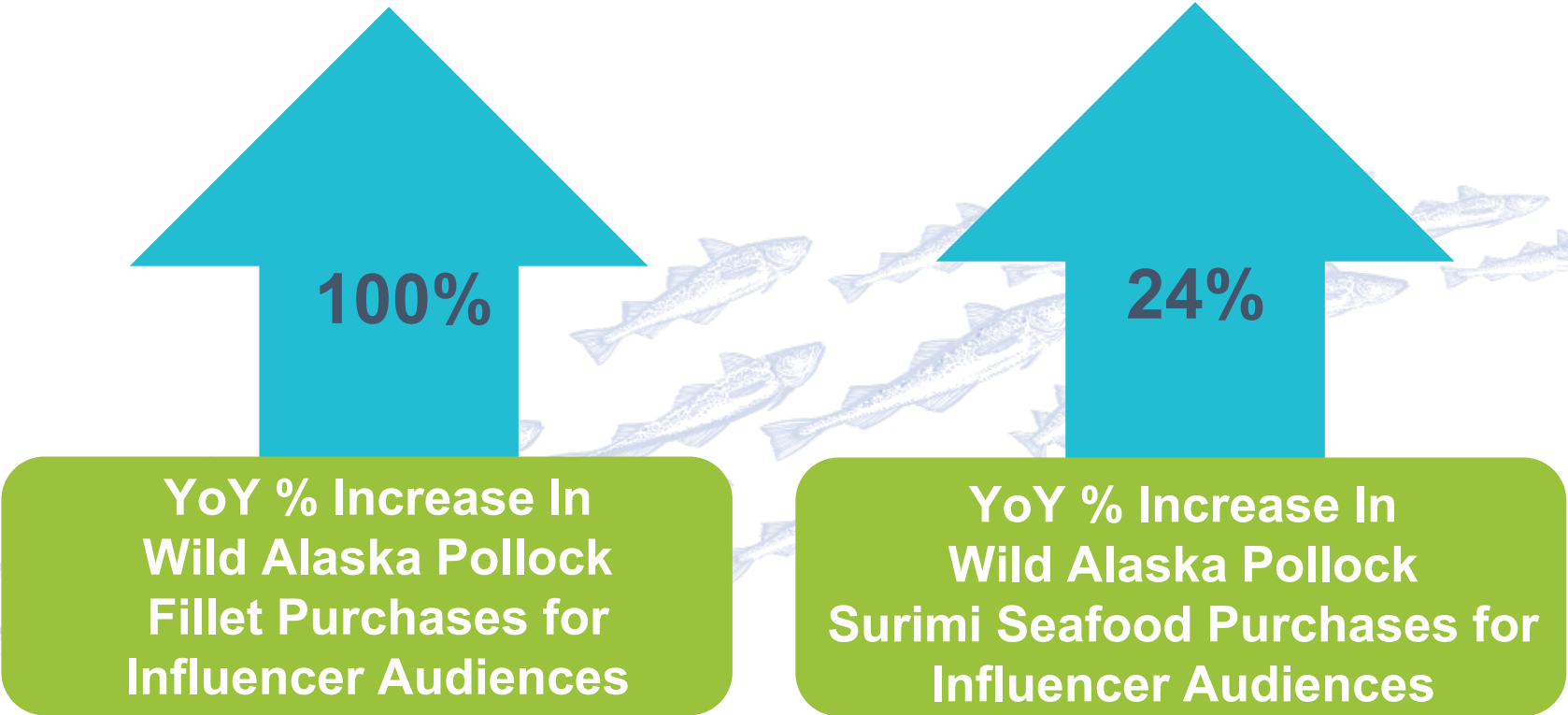
Wild Alaska Pollock Fillet Sales Lift for Influencer Content



Wild Alaska Pollock Surimi Seafood Sales Lift for Influencer Content



AND HAS INCREASED PURCHASES AMONG INFLUENCER AUDIENCES YOY



Influencer audiences bought Wild Alaska Pollock and surimi at a higher rate during the campaign compared to the same time last year.



Campaign sales period analyzed 7/11/2022 – 8/7/2022.

OTHER MEANINGFUL RESULTS



Influencer efforts exceeded expectations, overdelivering across all set KPIs including engagement rate and sales lift.



Impressions*

14,067,652

(The # of times a piece of content is displayed to consumers)



Reach*

11,651,666

(The # of unique users exposed to a piece of content)



Engagement Rate

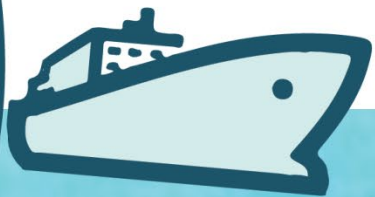
2.2%

(The % of users who engaged by liking, sharing, viewing, saving, or clicking on a post)



LOOKING AHEAD

- GAPP will initiate a second round of influencer content scheduled for January / February
- Targeted pulses ensure a year-round presence; repetition being the cornerstone of the campaign's ability to influence consumers and increase conversions
- Second pulse will feature Wild Alaska Pollock and Surimi Seafood
- Content will lean into new year / healthy eating trends, while continuing to educate consumers about Wild Alaska Pollock, raise awareness and lift sales



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KEYNOTE SPEAKER



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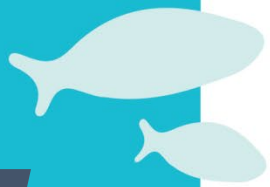


From 'Top Chef' to the Top Fish

Celebrity Chef Antonia Lofaso



**LET'S BLOW
UP SOCIAL
WITH
#GAPPAM2022**



Brought to you by

AQUAMAR

Lunch

Noon - 1:00 pm





**THANKS FOR
BLOWING UP
SOCIAL WITH
#GAPPAM2022**



**Thank
you!**



THANK YOU SPONSORS!



Wild, Natural & Sustainable®





Welcome Back from Lunch!

Port of Seattle Commission President Ryan Calkins





Pier 91, Smith Cove, Seattle, 1947



SEATTLE IRON & METALS CORP
206-682-9040

Maritime Lines of Business



Container Cargo



Cruise



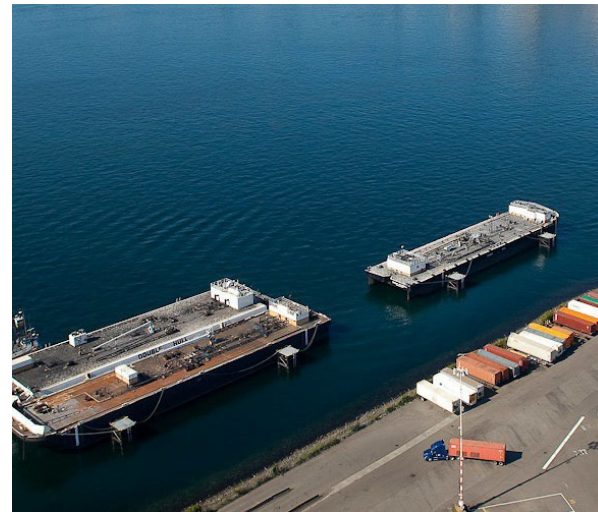
Grain and Breakbulk Cargo



Commercial Fishing



Recreational Boating

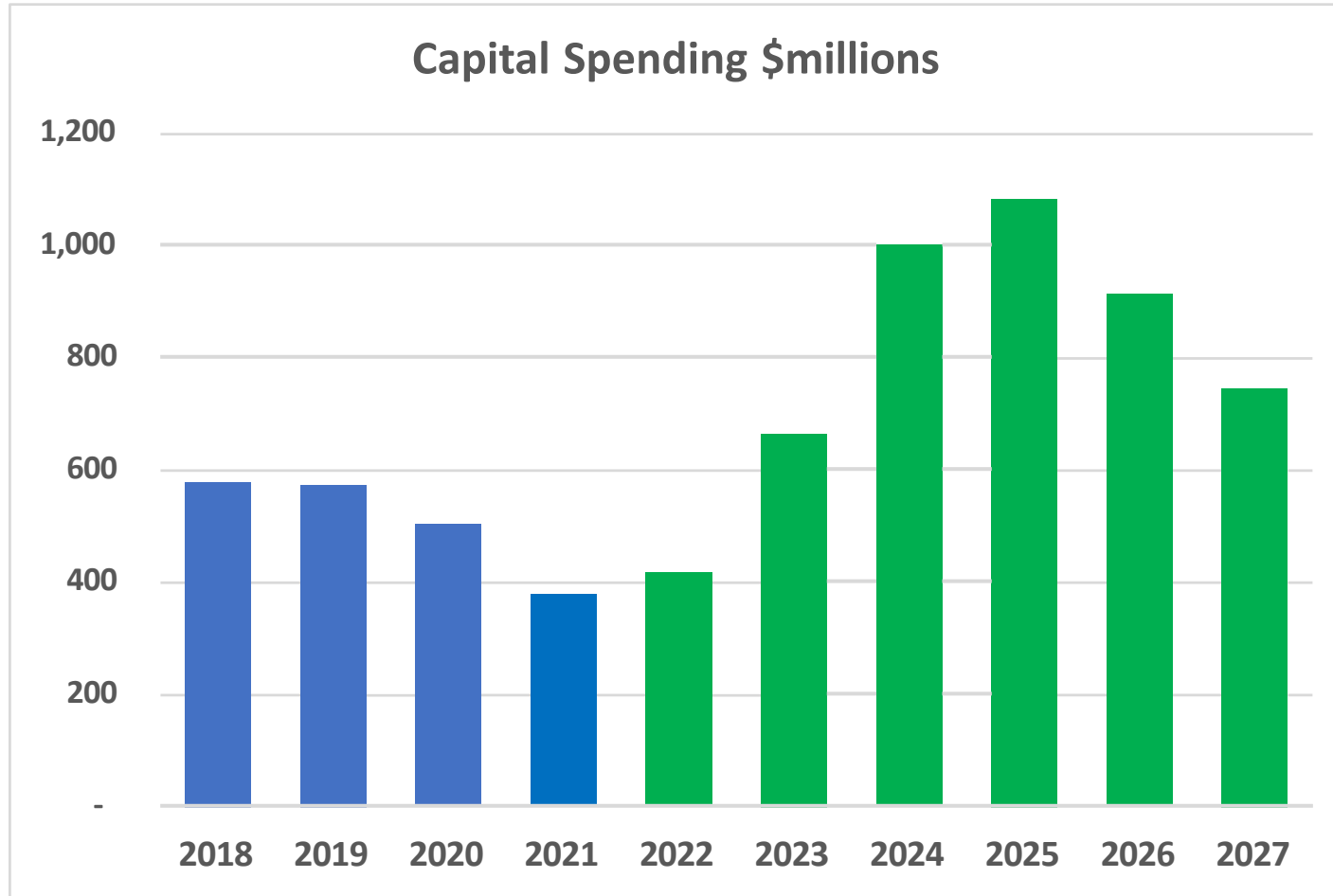


Industrial Moorage



Real Estate

Preparing for Major Growth of Capital Program

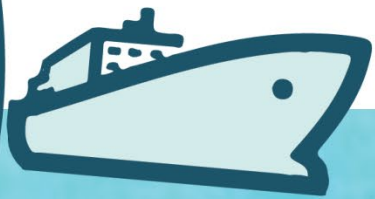


- 2025 would be highest annual spending ever
- 2023 Operating budget will add resources to effectively plan and deliver growing capital program
- Forecast excludes Sustainable Airport Master Plan (SAMP) near-term projects





Why Are We Talking About Offshore Wind?





MARITIME
HIGH SCHOOL





Gimme that Filet-O-Fish

Jason Cervone, McDonald's U.S.; Craig Morris, GAPP





Update on Typhoon Merbok

Elizabeth Miller, VP of Development and Communications
The Alaska Community Foundation





DONATE NOW



DONATE HERE:

<https://alaskacf.org/western-ak-disaster-recovery-fund/>



**WE STAND WITH
WESTERN
ALASKA**

**DONATE TO HELP AT
THE LINK IN OUR BIO**



Brought to you by



What do Americans Think about Wild Alaska Pollock?

Mary Elizabeth Germaine, Partner, Global Head of Analytics, Ketchum;
Lauren Hasse, Director Analytics, Ketchum



Timeline of Events

2019

2020

2021

2022

September 2019
Consumer Survey
wave 1 fielded



March 2020
COVID-19
declared State of
Emergency



August 2020
Consumer Survey
wave 2 fielded



Spring 2021
Restrictions lifted,
People begin to
enter restaurants
and attend events

July/August 2021
LCA findings
launched

Consumer Survey
wave 3 fielded

December 2021
Surimi Holiday
Influencer Campaign



July 2022
Influencer
Campaign

August 2022
Consumer Survey
wave 4 fielded

Methodology

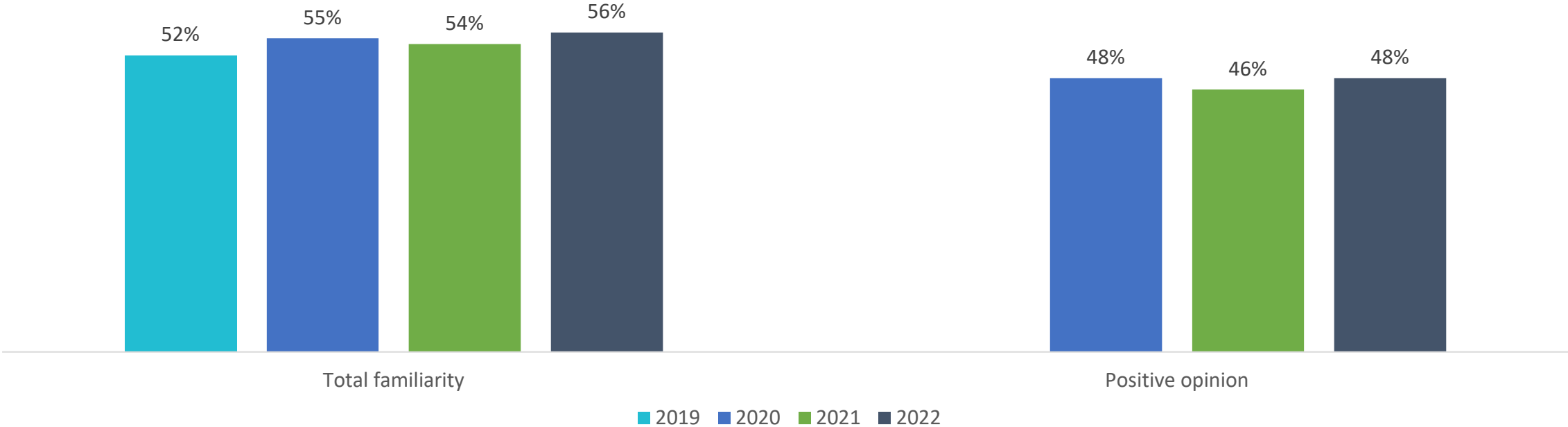
- An online survey was fielded in the United States among a nationally-representative sample of adults aged 18 years or older between August 17th-19th, 2022. This report reflects findings from the general population (n=1,023), a statistically significant sample to allow for segmentation among gender, age, region, race/ethnicity, education and income.
- Following this, a drivers of demand analysis using predictive analytics methods was conducted to understand which fish attributes are most likely to drive Wild Alaska Pollock demand overall.
- In addition to Wild Alaska Pollock, the following competitors were included in this analysis:
 - Salmon
 - Cod
 - Tilapia
 - Haddock
 - Sole



Tracking Wild Alaska Pollock's performance on core KPIs

We saw increases in total familiarity and positive opinion of Wild Alaska Pollock, resulting in the highest familiarity of the fish since we started the study.

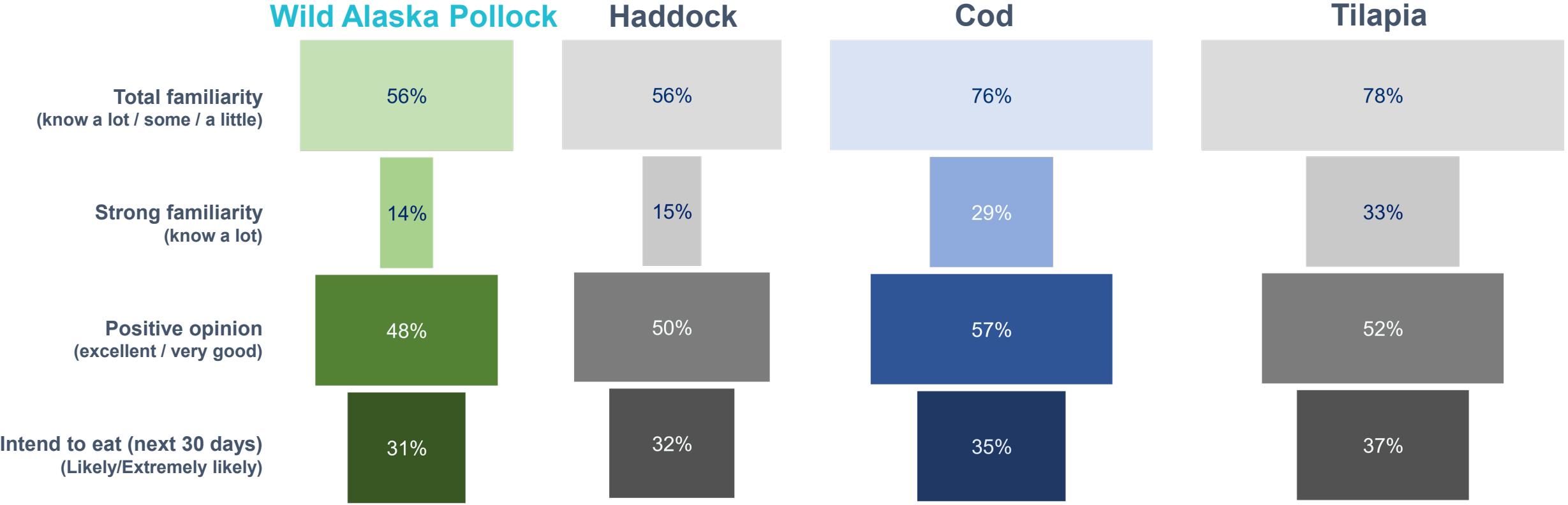
Wild Alaska Pollock YOY KPIs



Arrows indicate a statistically significant change compared to 2021. Green indicates an increase, red indicates a decrease, and no arrow indicates no change.
Q1. How much would you say you know about the following fish? Base: Total 2022 (n=1023); 2021 (n=1066); 2020 (n=1244); 2019 (n=1026)
N6. Based on everything you know about Wild Alaska Pollock, what is your overall opinion of it? Base: Those aware of Wild Alaska Pollock 2022 (n=573); 2021 (n=576); 2020 (n=610)



Wild Alaska Pollock closing the gap with competitors on positive opinion and intent to eat in the next 30 days



Base= total respondents (n=1,023)



Wild Alaska Pollock has seen higher growth in benchmarks compared to some of our other competitors.

Good opinion

(excellent / very good / good)

	2021	2022	YoY Change	
Tilapia	73%	76%	+3 ppt	
Wild Alaska Pollock	79%	81%	+2 ppt	#2
Cod	84%	85%	+1 ppt	
Haddock	80%	81%	+1 ppt	

Likelihood to eat in the coming month

(T3B on 10-pt scale)

	2021	2022	YoY Change	
Wild Alaska Pollock	24%	31%	+7 ppt	#1
Tilapia	31%	37%	+6 ppt	
Haddock	27%	32%	+5 ppt	
Cod	33%	35%	+2 ppt	

Note: Data on this slide represents total respondents.

Friends and Family are a top opportunity for fish eaters to learn about and consume Wild Alaska Pollock

Top ways they learn about Wild Alaska Pollock:

- 35%** Friends and family (+11pp vs. 2021)
- 35%** Grocery stores (+3pp vs. 2021)
- 26%** Cooking shows (+5pp vs. 2021)
- 18%** Sit-down restaurant (+3pp vs. 2021)
- 14%** Social Media (+5pp vs. 2021)
- 14%** Fast-food restaurant (+5pp vs. 2021)
- 13%** Celebrity/famous chef (+5pp vs. 2021)
- 12%** News (+2pp vs. 2021)

Likelihood to eat Wild Alaska Pollock from the following settings (T3B on 10-pt scale)

- 43%** Grocery store frozen aisle (+14pp vs. 2021) ↑
- 40%** Sit-down restaurant (+10pp vs. 2021) ↑
- 34%** Fast-food restaurant (+10pp vs. 2021) ↑

Arrows indicate a statistically significant change compared to 2021. Green indicates an increase, red indicates a decrease, and no arrow indicates no change
Q2. How did you learn about Wild Alaska Pollock? Base: Fish eaters aware of Wild Alaska Pollock 2022 (n=419); 2021 (n=275)
Q5. How likely are you to eat Wild Alaska Pollock from the following settings? Base: Fish eaters aware of Wild Alaska Pollock 2022 (n=419); 2021 (n=275)



OPPORTUNITIES FOR DIFFERENTIATION FOR WILD ALASKA POLLOCK



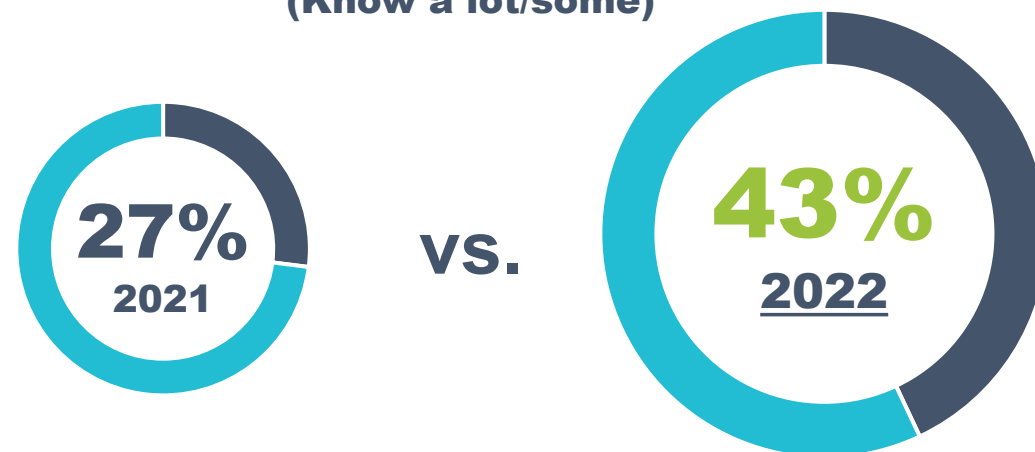


Sustainability is growing in importance among fish eaters, while awareness of Wild Alaska Pollock sustainability also grows.

**Importance of sustainability for fish eaters when purchasing/ordering fish
(Very/somewhat important)**



**Fish eaters knowledgeable on the sustainability of Wild Alaska Pollock
(Know a lot/some)**

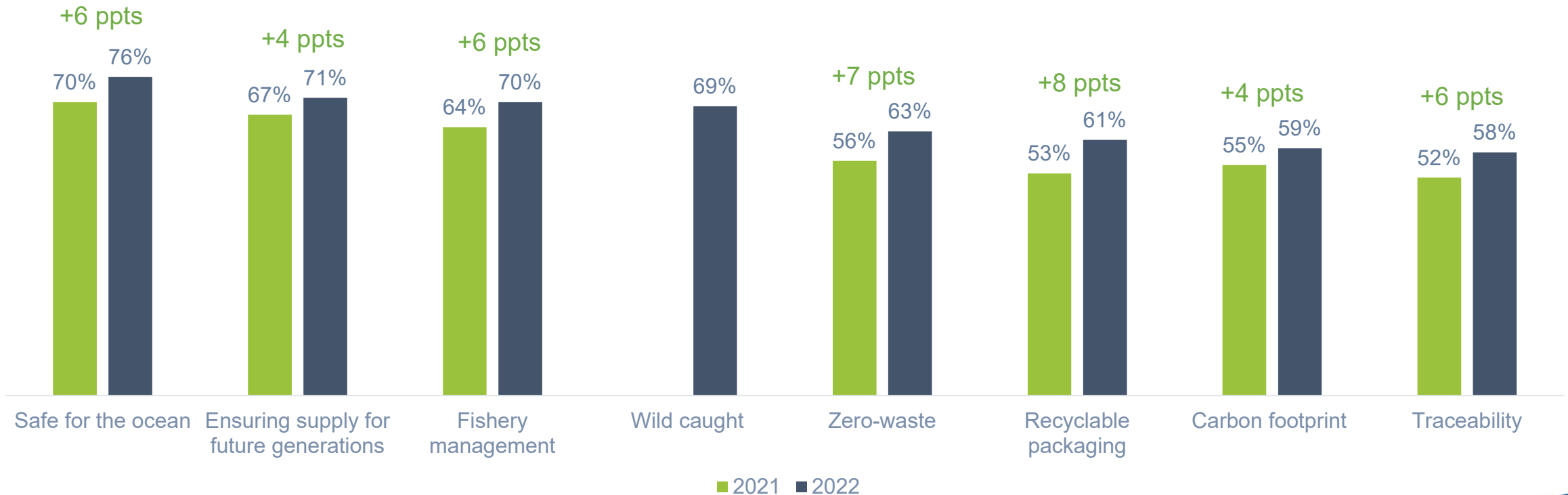


Note: Data on this slide represents fish eaters only.



To fish eaters, sustainability means safe for the ocean and ensuring supply for future generations

Attributes that are important when eating sustainably
(Somewhat/very important)

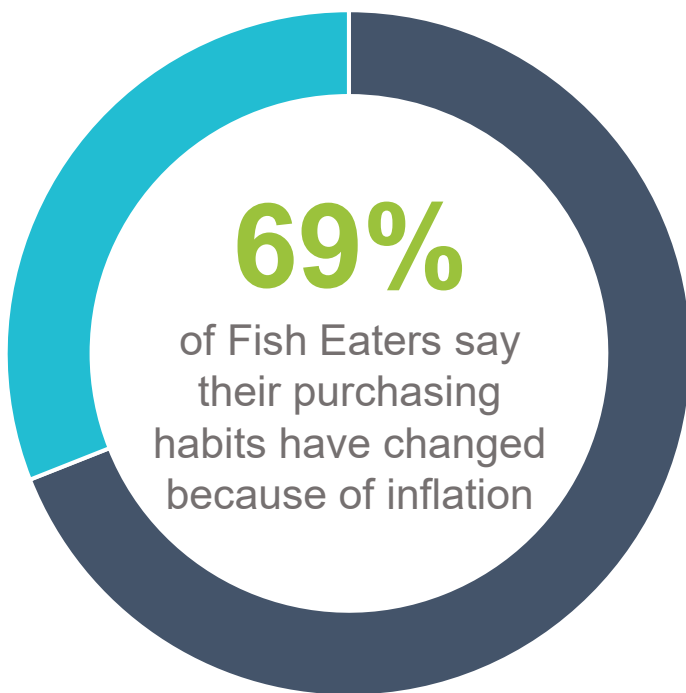


N38. When it comes to purchasing/ordering fish, how important are the following aspects of sustainability to you? Base: Fish Eaters (n=640)
N37: How important is sustainability to you when purchasing/ordering fish? Base: Fish Eaters (n=640)





Inflation is hitting consumers hard – fish eaters are purchasing less expensive and frozen aisle fish



Top ways fish purchasing habits have changed for Fish Eaters

- 35%** I am buying less expensive fish at the grocery store or market
- 28%** I am buying fish from frozen aisle instead of the fish counter
- 25%** I am buying less expensive forms of protein than seafood/fish
- 23%** I am not purchasing/ purchasing less fish at the grocery store or market
- 21%** I am buying fish products using coupons/discounts

W13. Have your food purchasing habits changed because of inflation? By inflation, we mean a general increase in prices and fall in the purchasing value of money. Base: Fish Eaters (n=640)

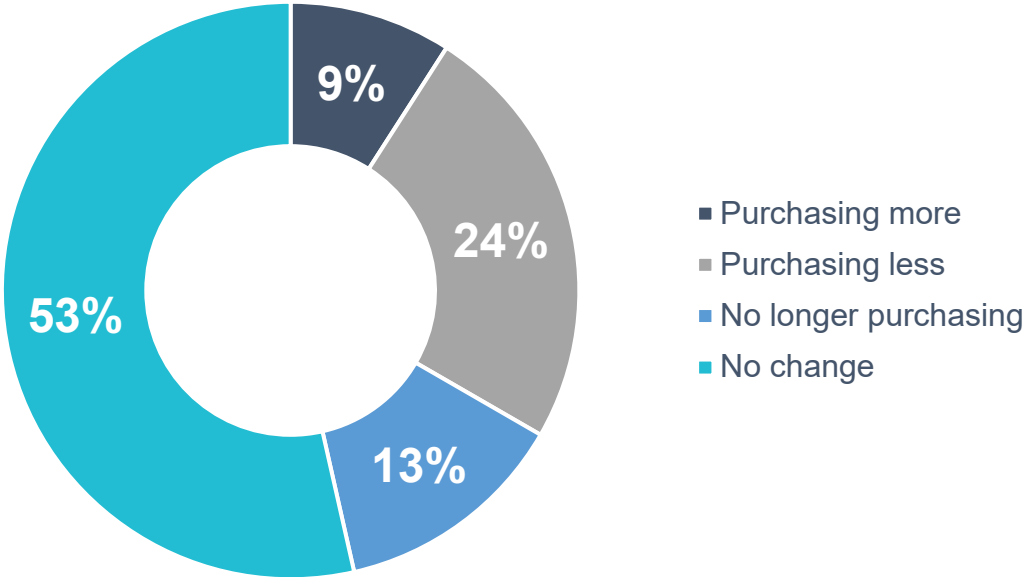
W15. How have your fish purchasing habits changed because of inflation? Base: Fish Eaters whose purchasing habits have changed (n=443)



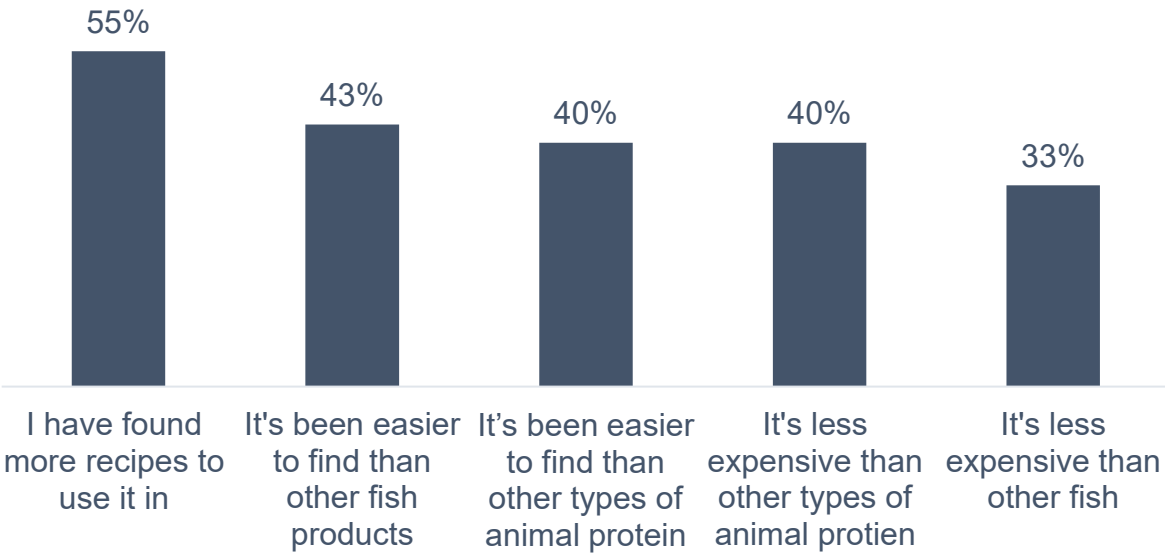


Direct consumer messaging is driving purchase

Purchasing habits over the last 3 months for Wild Alaska Pollock



Reasons for purchasing more Wild Alaska Pollock over the last 3 months



W16. How have your purchasing habits of the following products changed over the last 3 months? Base: Wild Alaska Pollock Fish Eaters whose purchasing habits have changed (n=443)
W17. Why are you purchasing Wild Alaska Pollock more over the last 3 months than you have before? Base: Wild Alaska Pollock Fish Eaters whose purchases have increase over the last 3 months (n=42)

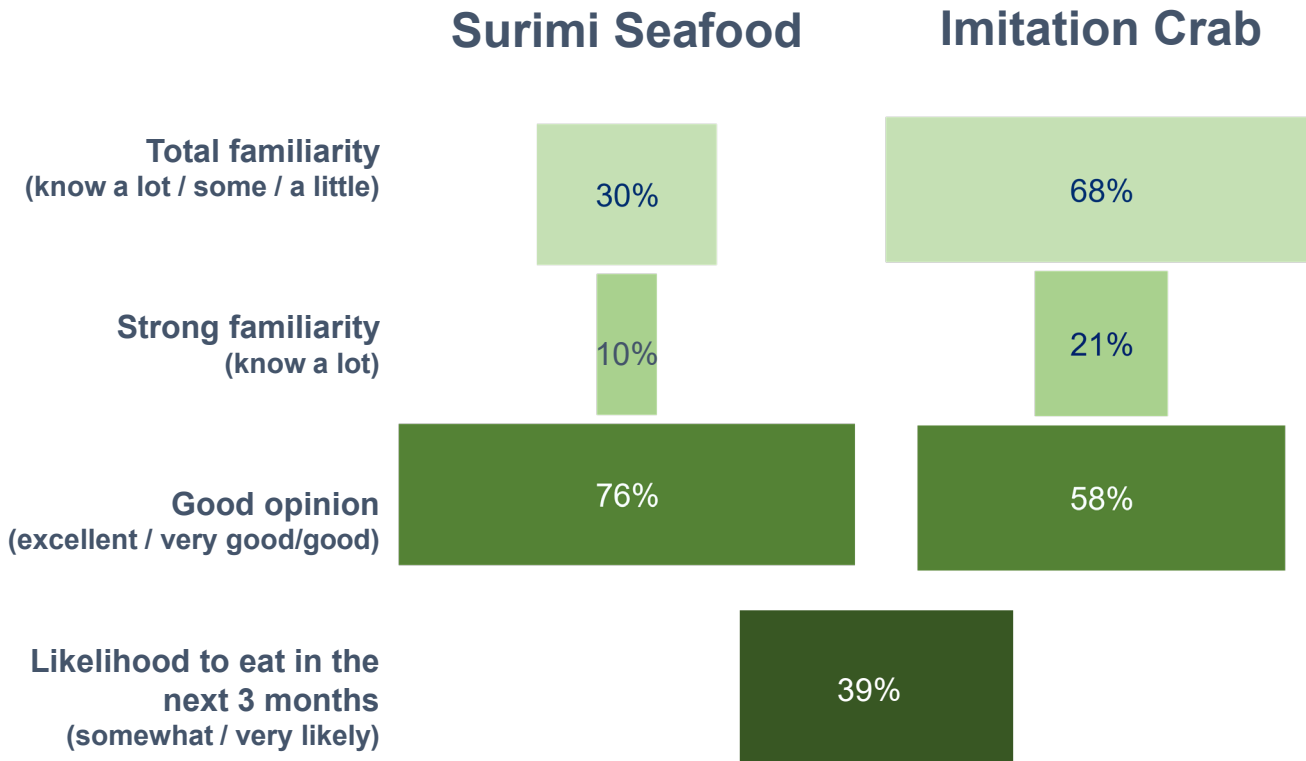




Surimi Seafood

31%

of fish eaters aware of Imitation Crab or Surimi Seafood are aware that they are interchangeable terms



Surimi seafood holds a more positive association over imitation crab, despite a lower familiarity.

W5. How much would you say you know about each of the following? Base: Fish Eater (n=640)

W6. What is your overall opinion of the following products? – Base: Surimi seafood Fish Eater (n=192); Imitation crab Fish Eater (n=443)

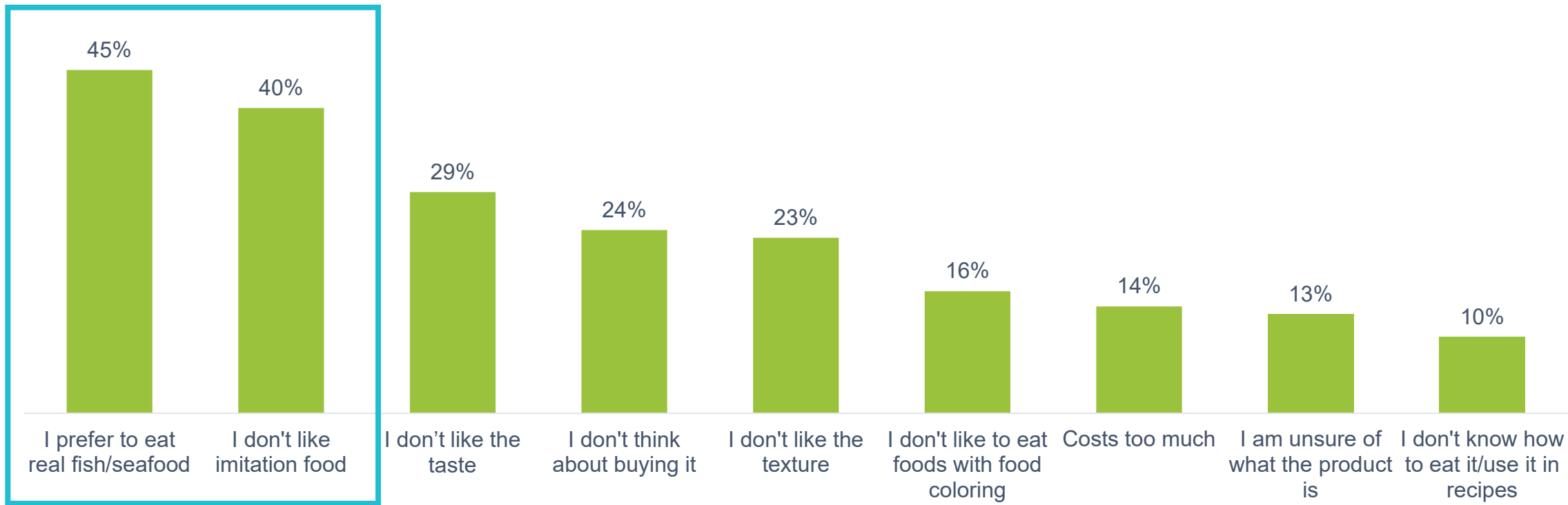
W7. Were you aware that surimi seafood and imitation crab are interchangeable terms to describe the same product? Base: Fish Eaters aware of Surimi Seafood or Imitation Crab (n=440)

W8. How likely are you to eat surimi seafood, also known as imitation crab, in the next 3 months? Base: Fish Eaters (n=440)



Barriers to purchasing Surimi Seafood are primarily perception based

**Top reasons Fish Eaters are not likely to purchase Surimi Seafood in the next three months
(Among those aware of surimi seafood/imitation crab AND not likely to eat in in the next three months)**



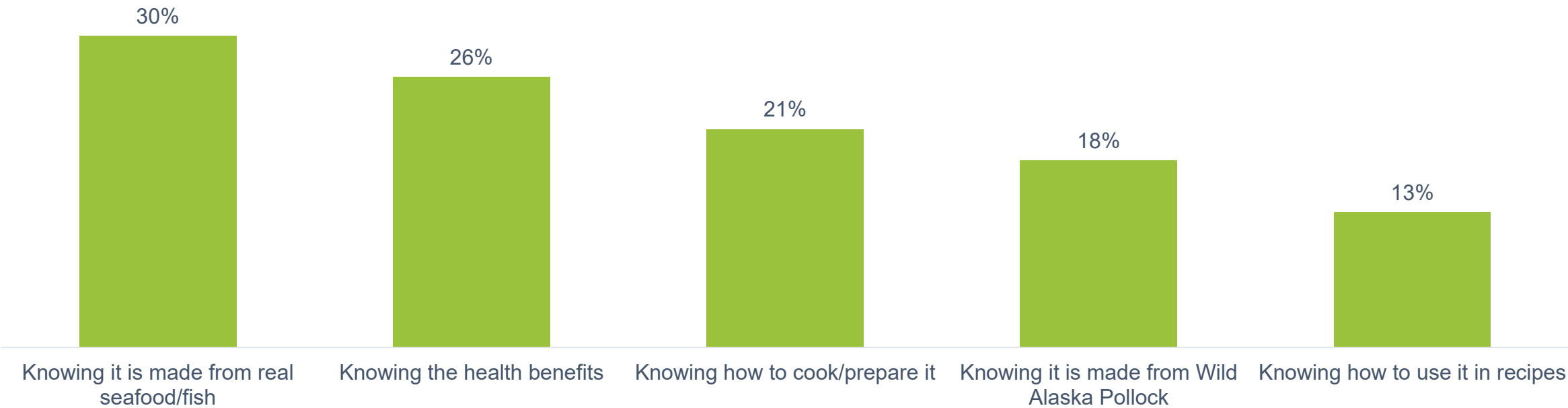
W11. Which of the following describes why you're not likely to purchase surimi seafood in the next three months? Fish Eaters not likely to eat Surimi Seafood in the next three months (n=126)





Fish eaters are more likely to purchase Surimi Seafood if they knew it was made from real seafood/fish

Attributes that would encourage fish eaters to purchase Surimi Seafood
(Among those aware of surimi seafood/imitation crab AND not likely to eat in in the next three months)



W8. How likely are you to eat surimi seafood, also known as imitation crab, in the next 3 months? Base: Fish Eaters aware of Surimi Seafood (n=440)
W12. What would encourage you to consider purchasing surimi seafood? Base: Fish Eaters not likely to eat Surimi Seafood in the next three months (n=126)



What this means for GAPP

#1

Continue the momentum Wild Alaska Pollock has garnered this year by offering inspiration through trusted social media influencers and partnerships to continue to grow demand and favorability.

#2

Wild Alaska Pollock's sustainability story should be woven into all communications efforts to continue the sustainability momentum achieved last year.

#3

Lean into the frozen aisle amid concerns of inflation to position Wild Alaska Pollock as a high quality and affordable protein option.

#4

The industry should continue to educate around surimi seafood, messaging how it's made with real seafood and providing recipe inspiration.

Thank you



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How Alaska Airlines is Reaching New Heights

Kevin Lemme, GM Airline Planning and Network Performance, Alaska Airlines





Airline Industry & the State of Alaska

Kevin Lemme

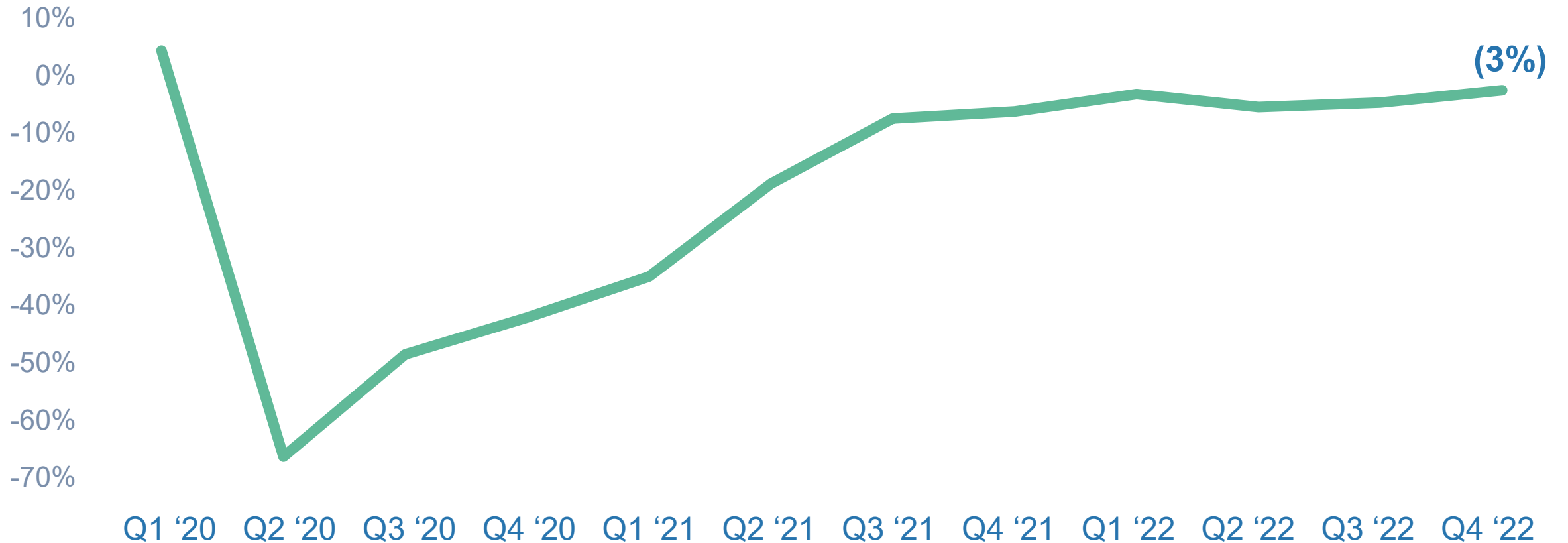
GM, Airline Planning & Network Performance

Alaska Airlines



Industry air capacity has still not reached 2019 levels, but we are close...

Domestic Airline Capacity vs 2019

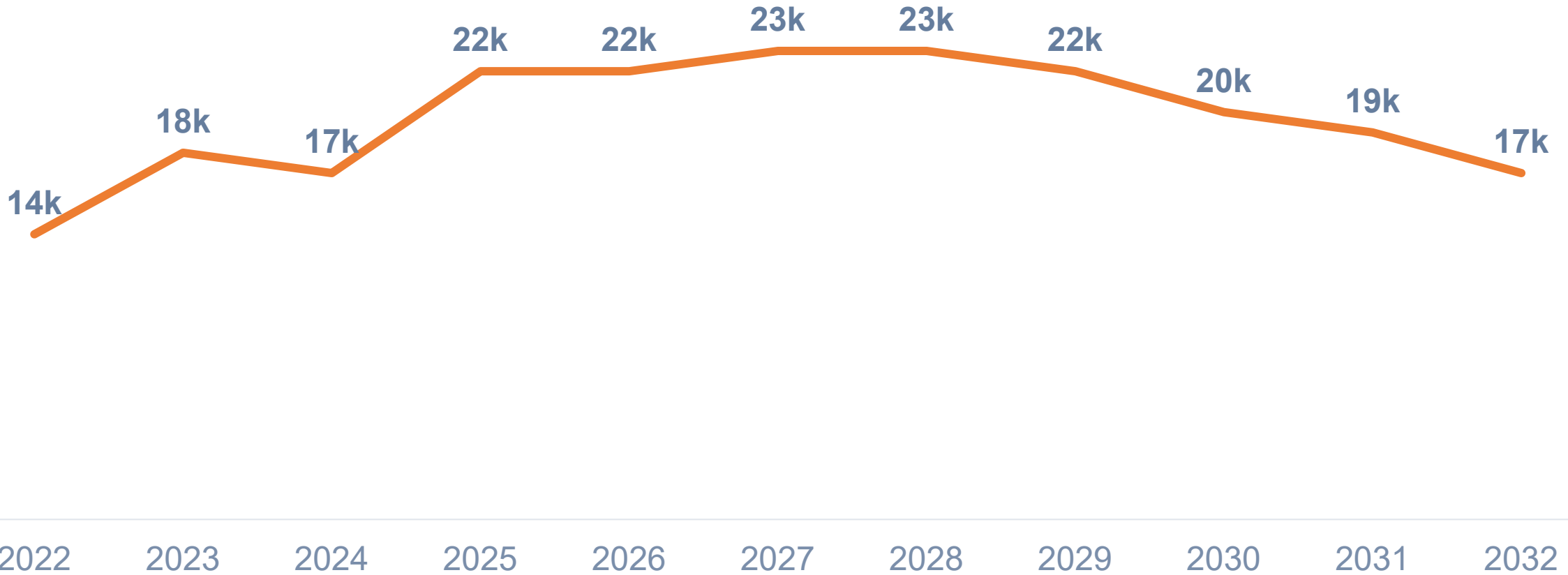


Cirium data, domestic airline scheduled ASMs 2020-2022



The industry is experiencing an unprecedented pilot shortage that may not peak until 2027

Forecast Pilot Shortage, next 10 years (000s)



2022
Source

Alaska has taken three (3) core actions to address the situation



Pilot Recruiting

**Ascend Pilot
academy**

**Development
Program with
15+ flight schools**



Single-Fleet Transition

Simpler

More Reliable

More Attractive



Competitive Labor Agreements

**Horizon: ratified
(Sep)**

**Alaska: tentative
agreement (Oct)**

We have observed several changes on the demand side for air travel



Leisure travel and longer biz trips



Compressed Booking Curve



Increased shoulder season demand

✈️ Alaska added four (4) new destinations to Anchorage, with nonstop seasonal service to the 10 largest destinations from ANC



 **We also introduced the Embraer 175 into the state, and expanded King Salmon and Dillingham to year-round.**



We joined oneworld to expand our reach and offer a seamless travel experience across the globe.

Oneworld member airlines



[Alaska Airlines](#) 



[American Airlines](#) 



[British Airways](#) 



[Cathay Pacific](#) 



[Finnair](#) 



[Iberia](#) 



[Japan Airlines](#) 



[Malaysia Airlines](#) 



[Qantas](#) 



[Qatar Airways](#) 



[Royal Air Maroc](#) 



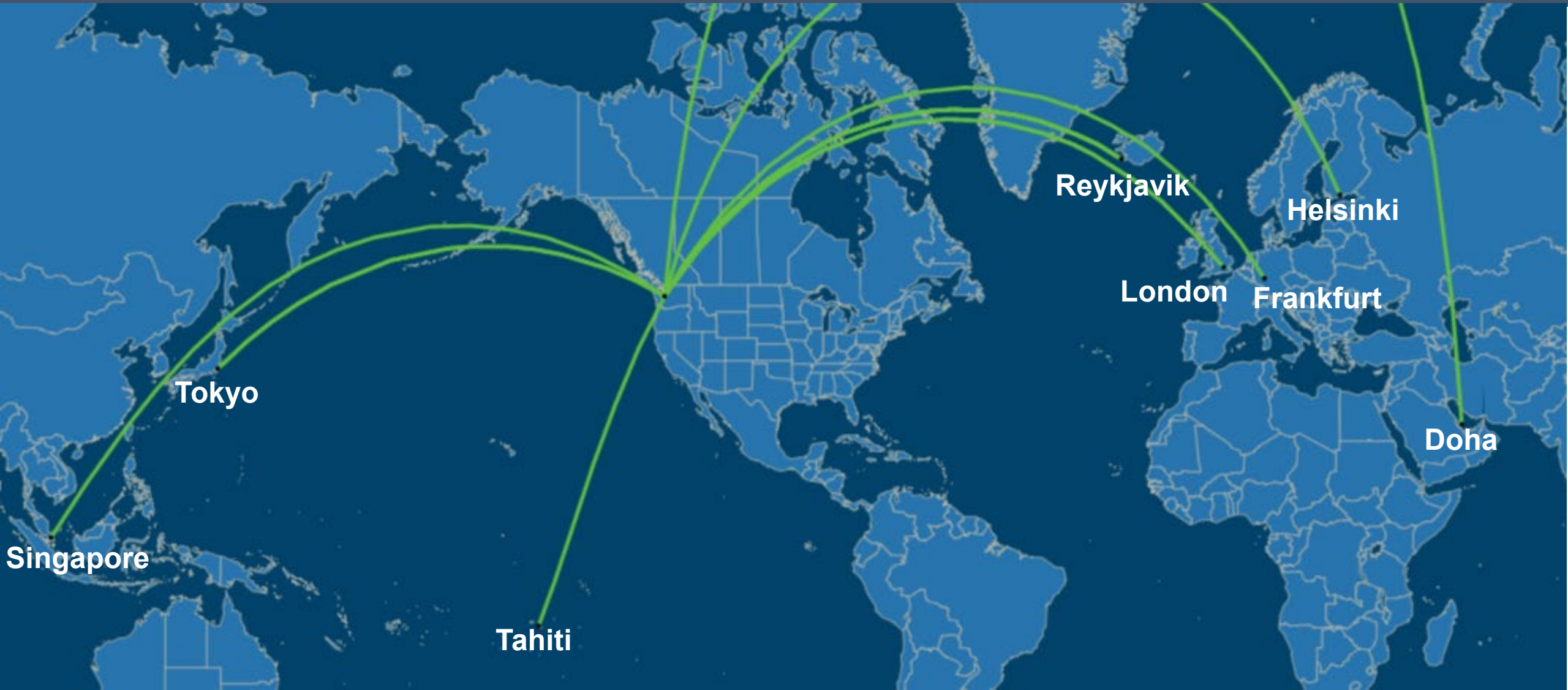
[Royal Jordanian](#) 



[SriLankan Airlines](#) 



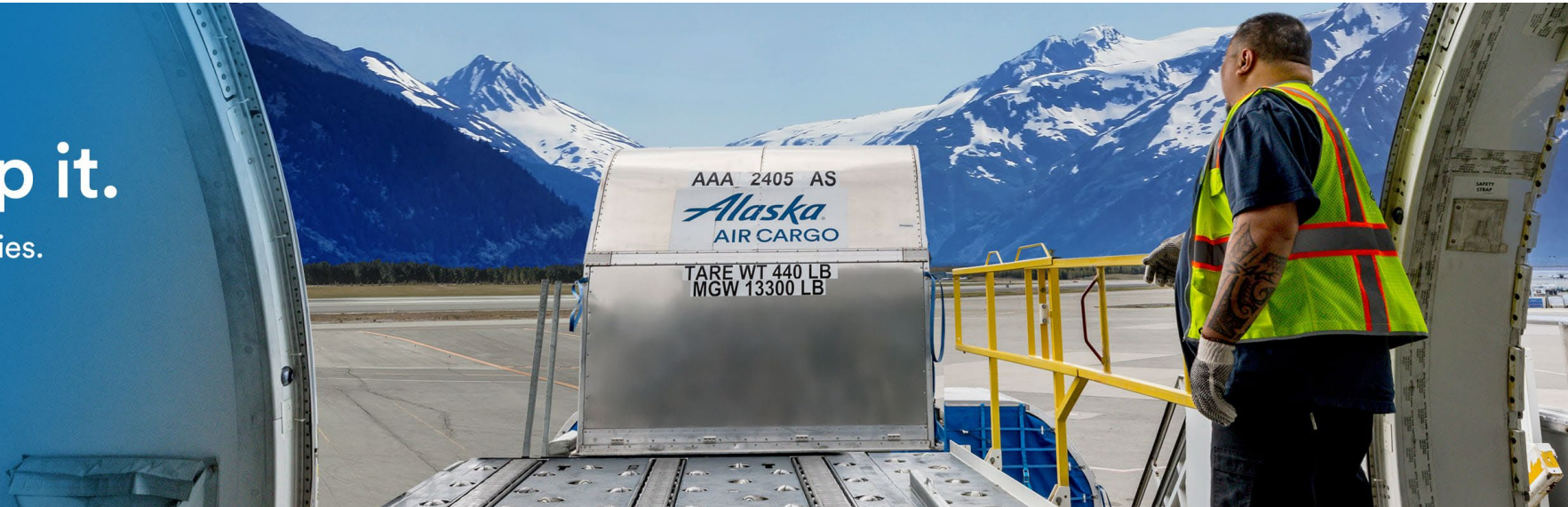
Our partners have invested in Seattle with international air service



✈️ Alaska Air Cargo has expanded in the state too..

If your business
needs it, we'll ship it.

Serving the needs of 20 Alaska communities.



 **Alaska Air Cargo is expanding it's freighter fleet, adding two (2) freighters next year, bringing total dedicated to five (5)**



 **2023 Focus:**

Frequency



Thank you.

**Thank
you!**

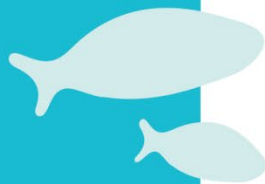
Port 
of Seattle®

THANK YOU SPONSORS!

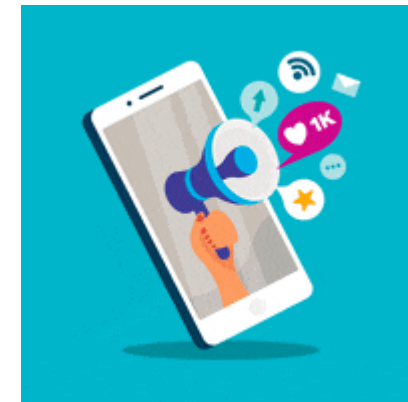


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GET SOCIAL WITH #GAPPAM2022



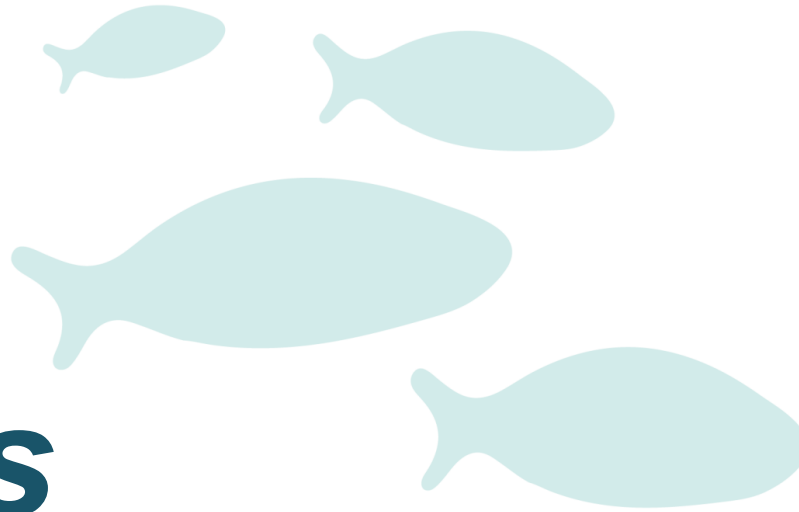
- **Twitter:** @wildakpollock
- **Instagram:** @wildakpollock
- **Facebook:** Genuine Alaska Pollock Producers
- **LinkedIn:** Genuine Alaska Pollock Producers



The Association of Genuine
Alaska Pollock Producers
2022

New Partnerships Charting New Territories

Christine Durkin
Partnership Advisor

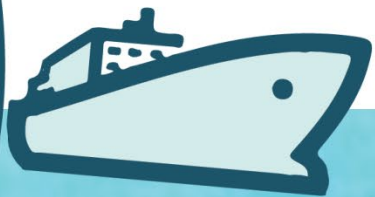


Partnership Program is Critical To GAPP Success – Proven Results

**>\$8MM
Released to
Date**

**On Average
Partners Spend
4X More than
GAPP**

**Combined
marketing
spend
promoting Wild
Alaska Pollock
>\$40MM**



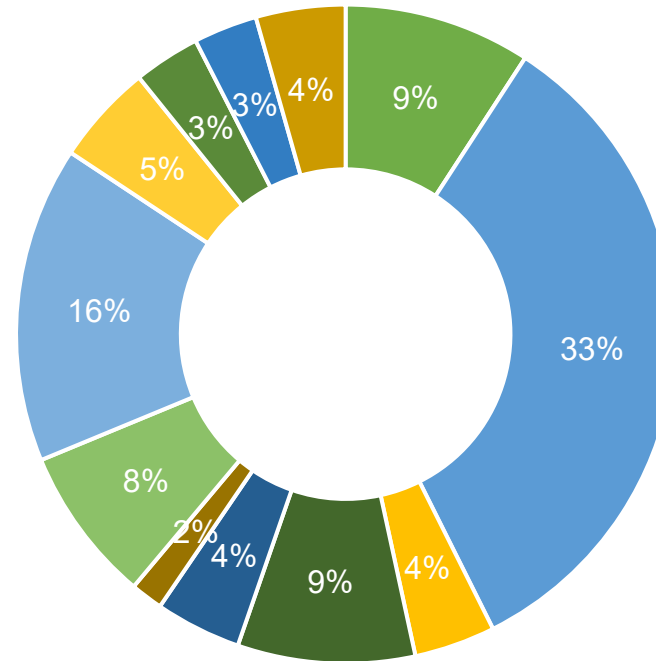
Moving Forward

What is Our Focus?

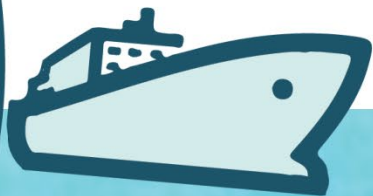


Drive a Diversity of Products

Majority of Historical Dollars Support Breaded & Battered and Fish Sandwich

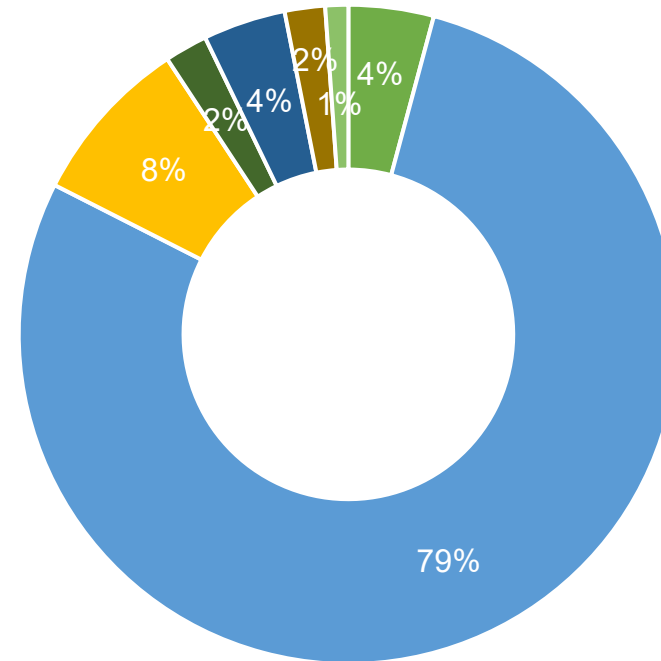


- Base
- Grilled
- Noodle/Pasta
- Pet Food
- Breaded & Battered
- Chilled
- Surimi
- Supplement
- Fish Sandwich
- Burger
- Wings/Bites
- Jerky



Increase Percentage of Out of Home

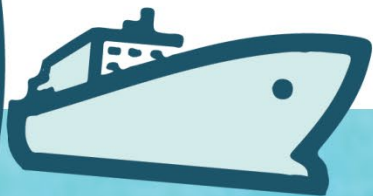
Majority of Historical Dollars Support Retail/Grocery Channel



■ C-Store
■ Fast Casual

■ Grocery/Retail
■ Family/Restaurant

■ Online
■ Foodservice/Distributor



Support 2040 Markets



U.K.



Spain



Malaysia



Japan



South Korea



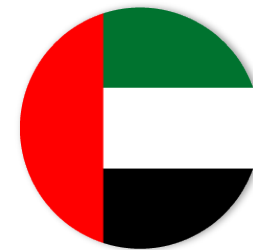
Poland



France



Germany



U.A.E.



2022/2023 Consumer Pillars

1

Innovation

2

Younger
Target

3

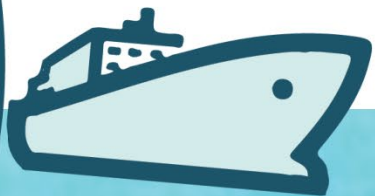
Digital/Social
Marketing

4

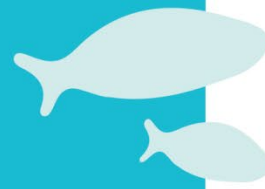
Out of Home

5

International
Growth



Innovation



**International
Influenced Baby
Food Launch**



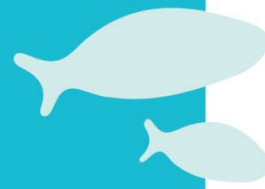
**New Surimi
Snacking
Launch**



**Pupu Paste
Culinary School
Initiative**



Younger Target



University and
Retail Program



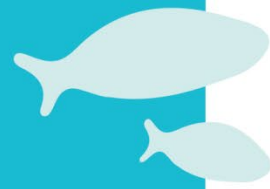
Mrs. Friday's



Waze Marketing
Program



Digital/Social



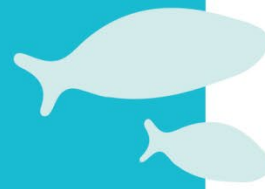
It's Seafood Time Digital
Program



Influencer, Tik Tok &
Instagram Program



Out of Home



NORDSTROM

**Chef's Features
Program**



**Chef Influence
Program**



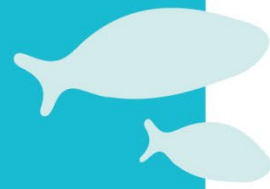
**Oak View Group
Integrated Partnership
Program**



**Lent Limited
Time Offer
Program**



International



Krissia Surimi Communication Program

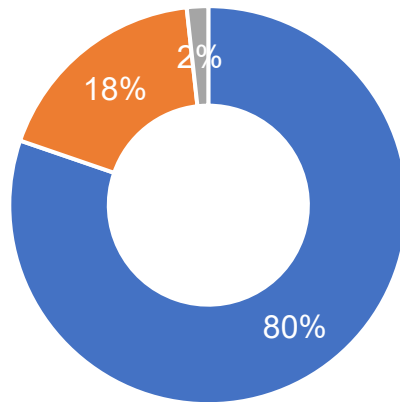


Launch of Wild Alaska Pollock
Breaded Products



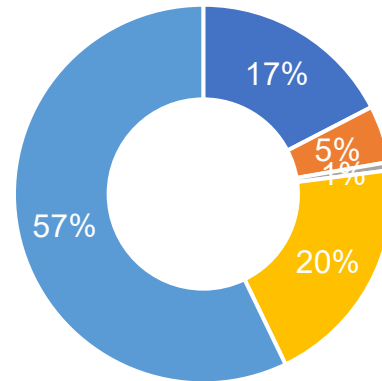
Breakdown by Country, Product and Channel

By Country



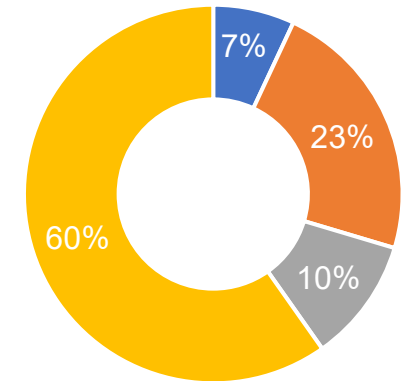
■ U.S. ■ Spain ■ Brazil

By Product

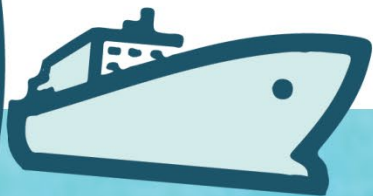


■ Breaded ■ Fillet ■ Innovation
■ Mixed ■ Surimi

By Channel



■ C-Store ■ Foodservice
■ Institutional ■ Retail



2022-2023 Partners



NORDSTROM



Thank You!





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Wild, Natural & Sustainable®

We Get By with a Little Help from Our Friends (in Retail and Foodservice)

Panelists: Chef Matt Mackay, Nordstrom; Jake Holbrook, Gorton's;
Analise Gonzales, Trident Seafoods; Jay Gordon, Arby's; Moderator:
Amanda Buckle, Seafood News & Urner Barry's Reporter



Meet the Panel



Amanda Buckle
Urner Barry/
Seafood News
Moderator



Analise Gonzales
Trident Seafoods
*Director of Specialty
Brands*



Jake Holbrook
Gorton's
Director of Marketing



Jay Gordon
ARCOP
*Sr. Director of
Procurement*



Chef Matt MacKay
Nordstrom
Regional Chef





Wild Alaska Pollock, Then and Now

Jim Johnson, Glacier Fish Company; Doug Christensen, Arctic Storm;
Wally Pereyra, Arctic Storm; Bob Desautel, Global Seas



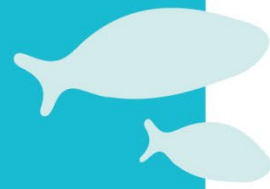


Closing Remarks

Craig Morris



2022 Top Hand Award



Past Recipients



Bob Desautel
2019



Margery Schelling
2020



Lou Shaheen
2021



2022

2022 Top Hand Award



CONGRATS!
Jason Martin, Vice
President of Sales and
Quality Assurance at
Golden Alaska Seafoods

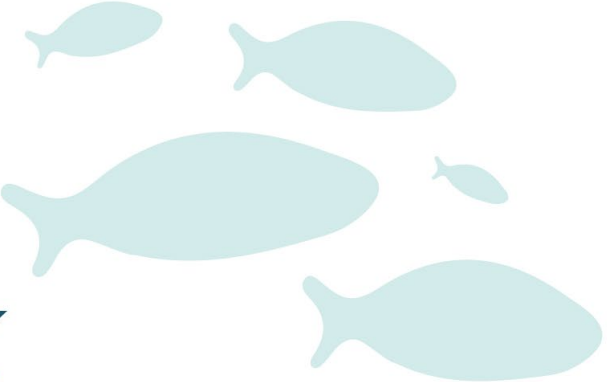


**THANKS FOR
CELEBRATING
WITH US!**

The Association of Genuine
Alaska Pollock Producers

2022

**Wild
Alaska
Pollock
ANNUAL MEETING**



Strategically Building Awareness and Demand for the Perfect Protein



THANK YOU SPEAKERS



THANK YOU SPONSORS!



Wild, Natural & Sustainable®



WILD ALASKA POLLOCK MEALS BROUGHT TO YOU BY...





SAVE THE DATE

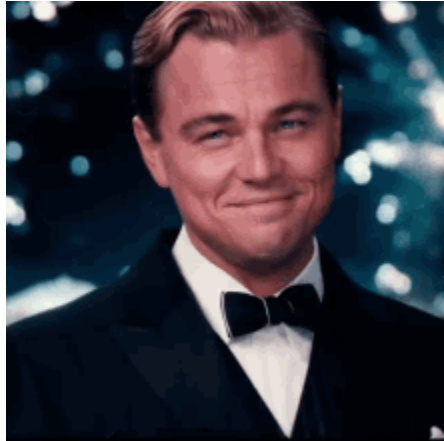
Wild Alaska Pollock

Annual Meeting 2023

Week 41 (October 9-13) of 2023!



RECEPTION



**THANKS FOR
JOINING US**

