

WILD ALASKA POLLOCK



**ANNUAL
MEETING
2023**



THANK YOU SPONSORS!



Supporting Sponsors: Alaska Fisheries Development Foundation, Angulas Aguinaga, Bank of America, Neptune Snacks, Perkins Coie, Restaurant Depot

WILD ALASKA POLLOCK



**ANNUAL
MEETING
2023**





OPENING REMARKS

Bob Desautel, CEO of Global Seas
Chairman of GAPP Board of Directors

**Thank you for a
delicious breakfast!**



Alaska
AIRLINES









THANK YOU GAPP BOARD OF DIRECTORS!



**Bob Desautel,
Chairman**



**Doug Christensen,
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THANK YOU TO OUR ASSOCIATE MEMBERS!



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TITLE



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THE PEOPLE BEHIND
WILD ALASKA
POLLOCK





James Branch Cabell · 1892

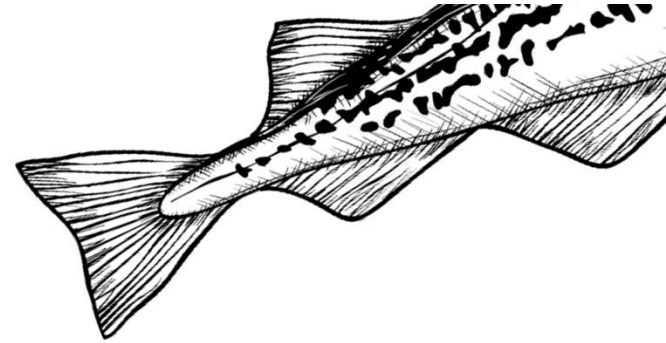
EXIT

FACEBOOK



GAPP's mission is to...

**Build awareness and
demand for Wild
Alaska Pollock.**

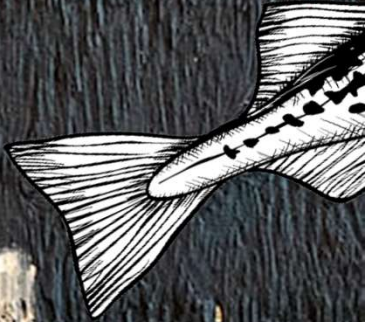




Mr. STEVENS

Mr. MAGNUSON

DREAM
BIG.





THANK YOU!



Welcome Remarks

Senator Dan Sullivan and Senator Lisa Murkowski



The People Behind Wild Alaska Pollock: GAPP State of the State

Craig Morris, GAPP







WILD ALASKA POLLOCK

ERA





TEAM WILD ALASKA POLLOCK

Go Team!





Our Members are **EVERYTHING** to us.



Akutan Catcher Vessel Assoc. - High Seas Catchers' Co-op - Northern Victor Fleet Cooperative - Peter Pan Fleet Cooperative
Unalaska Fleet Cooperative - UniSea Fleet Cooperative - Westward Fleet Cooperative

THANK YOU GAPP BOARD OF DIRECTORS!



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Your Support is Invaluable.



Gallagher



HIGH LINER FOODS



Sea. Taste. Enjoy!



AQUAMAR

CHANNEL FISH PROCESSING

GIRARD WOOD PRODUCTS, INC.



Beck Beck Pack Systems A/S



Íslandsbanki

SIMRAD



Rabobank

PERKINS COIE



K&L GATES

KeyBank

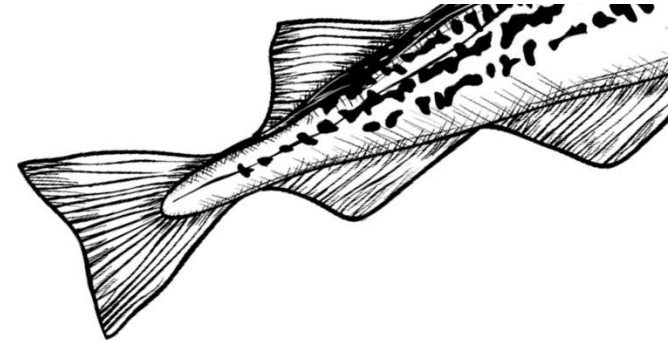


SUGIYOWA





GAPP's mission is to...
build awareness and
demand for Wild Alaska
Pollock.



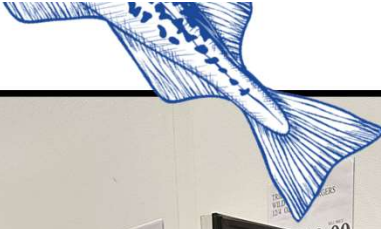
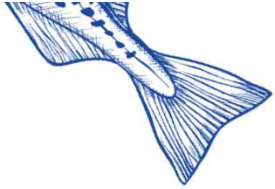


Good For you, Good for the Planet!

Wild Alaska Pollock is one of the most consumed fish in the U.S. Mild in flavor, and firm but tender texture of this snowy whitefish.

Low-fat, protein-rich, heart-healthy, high in vitamin B-12 and loaded with omega-3 fatty acids.





THE PEOPLE BEHIND
WILD ALASKA
POLLOCK











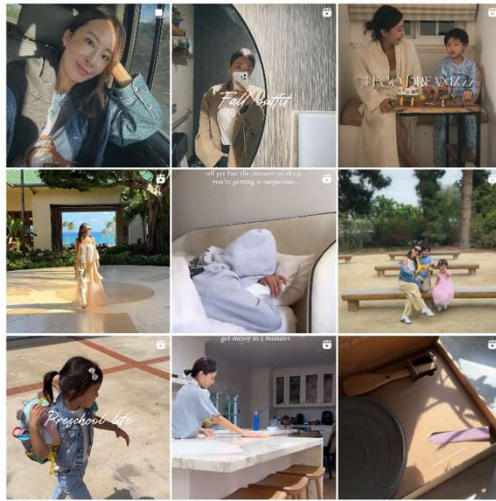
Real Fish Caught By Real People Sustainably in Alaska

Want to know more about the fish that plays the star role in your favorite fish sandwich? Scan the QR code to learn more!



WE'VE SEEN A LOT OF CHANGE!





mommydiary

Follow

Message



2,341 posts 307K followers 998 following

Angela Kim

8,192,291

creative & mama KRUS
finding beauty in messy motherhood
home, lifestyle & travel

OC/LA

mommy-diary.com/things-to-do-in-tokyo-with-kids + 1



angelicacastaneda_

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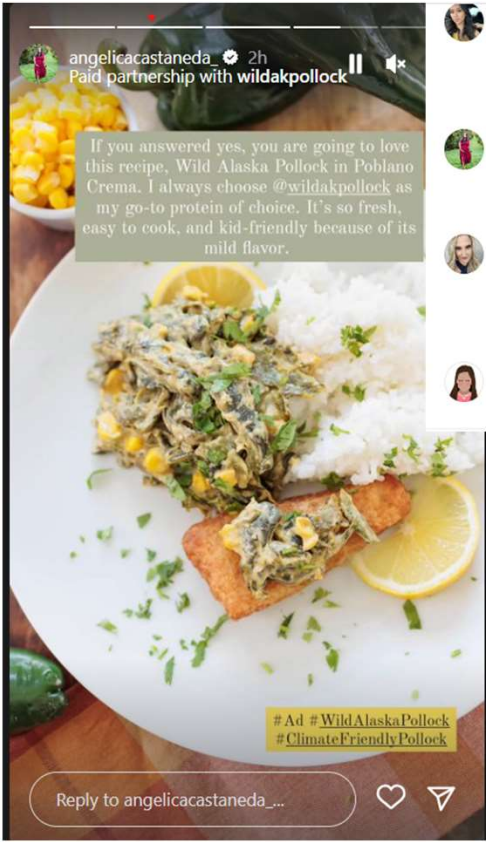
817 posts 55.8K followers 480 following

Angelica Castaneda she/her

61,277,883

Digital creator
Mrs. | Mama | Life+Style Blogger |
Latina | LGBT | Family Travel | Arizona
Hello@angelicacastaneda.com
angelicacastaneda.com





tinaslayer 1h
This looks amazing 🤤 and healthy! Win-win! 🙌
Reply

angelicacastaneda 3h
#favoriterecipes #seafooddishes
Reply

piccolo_sings 57m
Awww I just love this! SO delicious 🤤
Reply

whatfunwehadtoday 54m
Yum! This looks absolutely delicious



pete_eatss • Follow
Original audio

pete_eatss Edited • 12h
This breaded Wild Alaska Pollock paired with a Southeast Asian mango slaw is perfect for Summer 🍉

The crispy fish pairs well with the sweet and citrusy fresh mango slaw!

I enjoy using @wildakpollock because it's high in nutrition and sustainability. Learn more at the link in bio 📄
https://bit.ly/Pete_Eats_GAPP

Full recipe below:
 · 5 pieces of Wild Alaska Pollock
 · 1 mango
 · 1/4 red onion
 · 3 tbsp cilantro
 · 3 tbsp green onion
 · 2 tbsp mint

2,388 likes
13 HOURS AGO



sweatsandthecy • Follow
Original audio

sweatsandthecy my favorite @wildakpollock summer salad 🍓🥒🥑🍓🥒🥑🍓

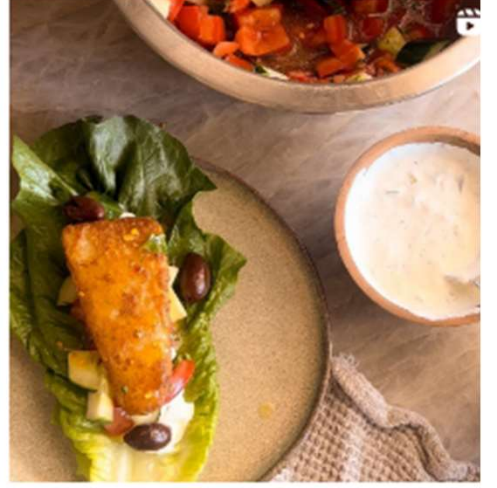
For marinade: Combine 1/3 cup fresh dill, 1/4 cup lemon juice, 1/4 cup olive oil, 4 tbsp dijon mustard, 2 cloves of garlic, 1 tsp maple syrup, salt + pepper to taste
For fish: Soak in marinade for 1-3 hours, grill 8 minutes at 400 degrees
For salad: Combine romaine, dill, quinoa, feta, tomatoes, peaches, cucumbers, avocado, grilled corn & apple cider vinaigrette + top with fish

#ClimateFriendlyPollock #WildAlaskaPollock #Ad
37m

350 likes
37 MINUTES AGO

Add a comment...











AJ POLLOCK



ajpollock • Follow
Paid partnership with wildakpollock

cesmorris 2d
Now that is a home run right there!
Reply

harveyjmartin 2d
That's a home run right there fella. Healthy world. Healthy humans.
1 like Reply

que_de_pasa 2d
Yummy burger 🍔

1,239 likes
2 DAYS AGO



ajpollock • Follow
Paid partnership with wildakpollock

ian_kennedy_31 7w
"Give a man a fish and you feed him for a day; teach a man to fish and you feed him for a lifetime"
25 likes Reply

View all 2 replies

pupukeagrindzlocalkinelures 7w
Miss you in Dodger blue. You are a class act 🍷

1 like Reply

anelyynn 7w
👍👍👍

Reply

anelyynn 7w
👍👍👍

Reply

3,807 likes
JULY 8



ajpollock • Follow
Paid partnership with wildakpollock

bobseattle 10w
Powered by Pollock 🍷
2 likes Reply

kev_munson 10w
This makes sense
1 like Reply

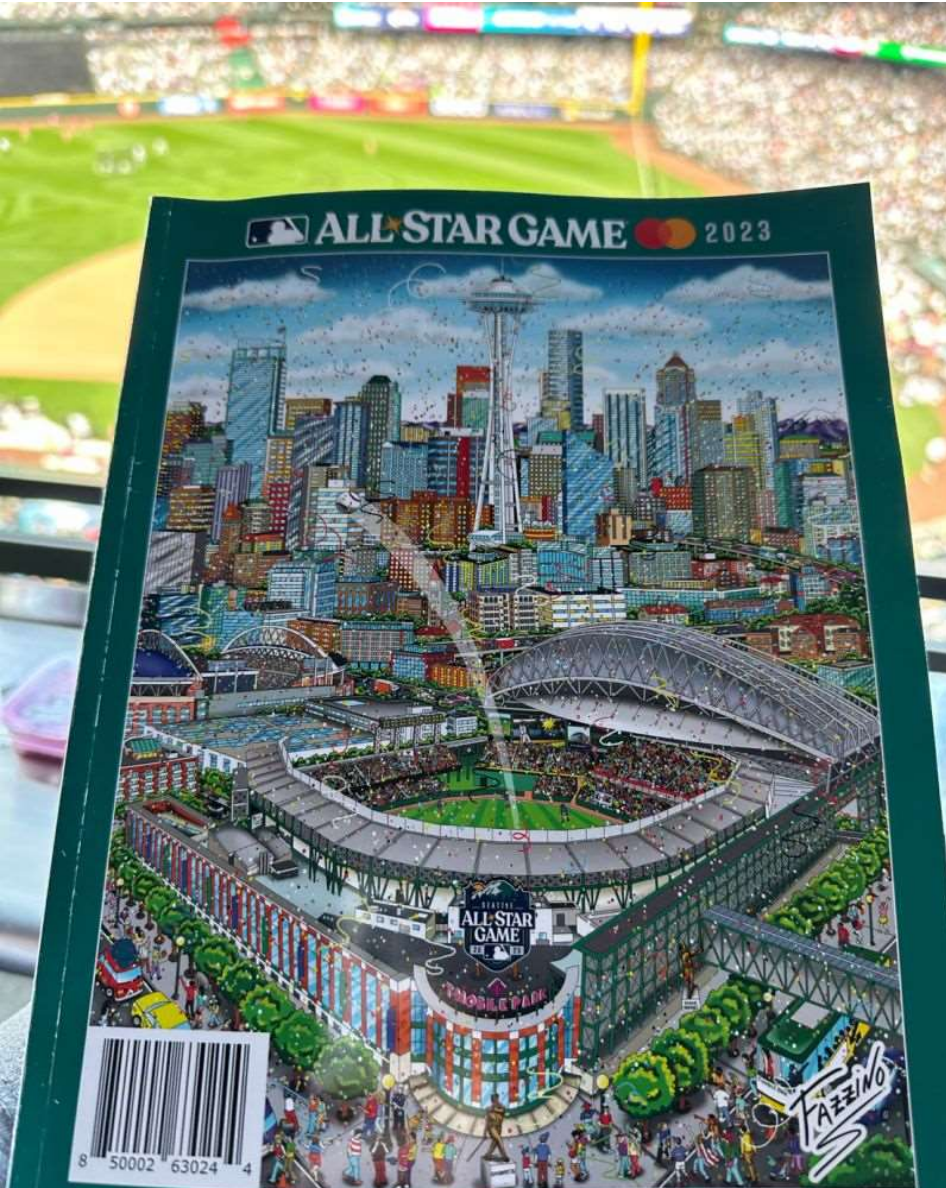
thatmarineguy96 10w
@ajpollock_ Happy Father's Day!
1 like Reply

nhormus 10w
Now that's a proper sponsorship
1 like Reply

jackie_hutt 10w
Happy Fathers Day AJ 🍷

6,577 likes
JUNE 18





Welcome to Seattle!

Home of the fleet that brings to market the most consumed wild-caught fish on the planet from the largest certified sustainable fishery in the world. Wild Alaska Pollock is found in your favorite dishes ranging from your favorite fish fillet sandwich to the fish sticks you and your family enjoy to increasingly a starring role in the center of the plate items you find at white tablecloth restaurants.



THE AMAZING WILD ALASKA POLLOCK

Good for You, Good for the Planet

Did you know all Wild Alaska Pollock is wild caught in the pristine, icy cold waters off of Alaska? Wild Alaska Pollock is mild tasting which makes it so versatile, has an unmatched nutrition proposition loaded with protein and low in fat, and has a carbon footprint that is just a fraction of land-based proteins like beef, pork, chicken and even plant-based proteins!

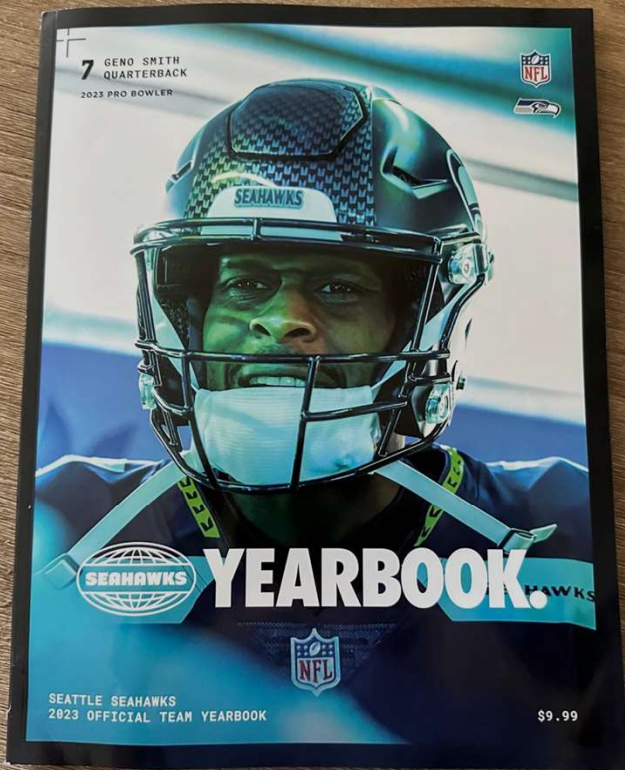


The Wild Alaska Pollock mural by Seattle artist Tyler Mertz on Seattle's Pier 91

Brought to you by the Association of Genuine Alaska Pollock Producers and the following companies that bring this amazing fish to consumers around the world!



www.alaskapollock.org



CLIMATE PLEDGE ARENA



TRIDENT SEAFOODS FRC

TRIDENT SEAFOODS

BOEING THE CLIMATE PLAN amazon WaFd Bank verizon



**CLIMATE
PLEDGE
ARENA**

***WILD ALASKA POLLOCK IS THE OFFICIAL WHITEFISH OF THE
SEATTLE KRAKEN AND CLIMATE PLEDGE ARENA***



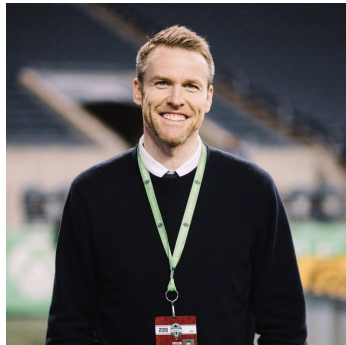
Molly DeMers

Executive Chef of The Climate Collective



OPPORTUNITIES IN SPORTS





Taylor Graham
Chief Revenue &
Marketing Officer,
Seattle Sounders FC



Brian Carriveau
VP of Food &
Beverage and
Merchandise,
Climate Pledge
Arena



Justin Moser
Co-Founder of the
DubSea Fish Sticks



Chris Voigt
SVP, Corporate
Partnerships,
Seattle Mariners



Saltonstall-Kennedy Grant

Recipient

2022-2023 Partners

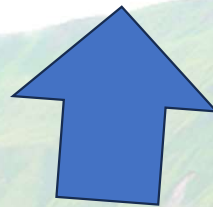
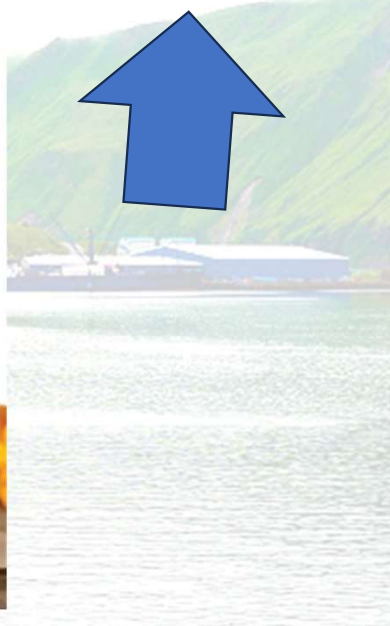
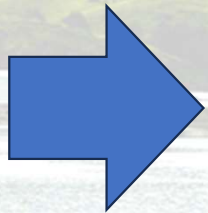
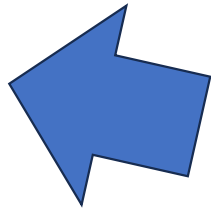


NORDSTROM



NORDSTROM PARTNERSHIP







Partnership Panel



Jake Holbrook
Vice President of
Marketing at
Gorton's



Lou Shaheen
Vice President,
Sales & Marketing,
Trans-Ocean
Products, Inc.



Mike Tigani
Director of
Marketing at King
& Prince Seafood



Tracey Schram
Vice President of
Sales and
Marketing, FujiSan
and Fuji Food
Products.



Ron Rogness
GAPP Director,
Industry Relations,
Partnerships &
Fishery Analysis



CELEBRATE!!!

\$10 Million



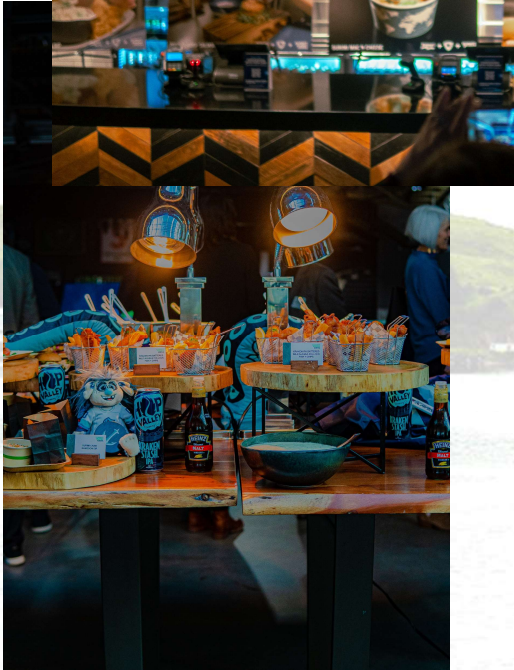
CELEBRATE!!!

\$40 Million

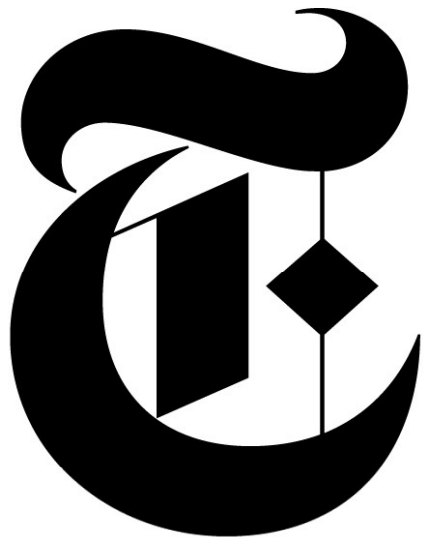
**Your dollars directly
expanding opportunity!**











The New York Times

A Star of Kenji López-Alt's Childhood Breakfasts Shows Its Versatility

Briny tarako and spicy mentaiko, easily found at Korean and Japanese markets, adds saltiness and umami to potatoes, pasta and cream cheese.



Mentaiko pasta, a staple dish of Japanese wafu cuisine, combines cured fish eggs and cream to sauce pasta. Julia Gartland for The New York Times. Food Stylist: Samantha Seneviratne.

By [J. Kenji López-Alt](#)
June 16, 2023



Ron Rogness, GAPP



GAPP MEMBER MONTHLY EU AND UK TRADE UPDATE

August 22, 2023



2023 Weekly Update on Alaska Pollock Fishery Performance

September 22, 2023



Genuine Alaska Pollock

Genuine Alaska Pollock Producers
info@alaskapollock.org

Coverage at a Glance



News

Good Morning!

Please find below this week's GAPP Newsclips. We hope you find these articles and social media insights helpful to you and your business. If there are additional terms or trends you'd like us to follow, please let us know.

Alaska Pollock Industry

Join us at the 2023 Wild Alaska Pollock Annual Meeting to gain valuable insights, engage in meaningful discussions, and explore exciting opportunities within the seafood industry. There are only a couple days left to register so register now by clicking the link! <https://event.mg/KUk0G5?RefId=AM2023>

Social Media

If you click on the images above you'll be able to see our full visual dashboard which our search terms feed. Just enter the **password** WAPI and you'll be up and running!

If there are others in your organization who would like to receive this newsletter, please send along their contact information and we will get them added to the distribution list.

All the best,
Craig Morris
CEO, GAPP

GAPP News

WILD ALASKA POLLOCK 5TH ANNUAL MEETING

13/09-2023 (Fish Focus) [in](#) [f](#) [t](#)
... fifth-ever Wild Alaska Pollock Annual Meeting on September 28 th , the Association of Genuine Alaska Pollock Producers (GAPP) has announced.

Reach:10,291

PANEL OF SEATTLE SPORTS EXECUTIVES TO DISCUSS SEAFOOD'S OPPORTUNITY IN ENTERTAINMENT VENUES AT GAPP ANNUAL MEETING

21/09-2023 (Fish Focus) [in](#) [f](#) [t](#)
... sports and entertainment venues nationwide, the Association of Genuine Alaska Pollock Producers (GAPP) announced today. Brian Carrievau of ...

Reach:10,291

Wild Alaska Pollock to Shine Spotlight on Consumer Behavior and Seafood Perceptions

15/09-2023 (Perishable News) [in](#) [f](#) [t](#)
... the fifth-ever Wild Alaska Pollock Annual Meeting on September 28 th , the Association of Genuine Alaska Pollock Producers (GAPP) announced ...

Reach:23,888

Wild Alaska Pollock Industry News

10 Seafood Chains That Serve the Highest Quality Fish

23/09-2023 (Eat This, Not That!) [in](#) [f](#) [t](#)
... fast-food fish chain responsibly sources its seafood, serving wild-caught Alaskan pollock, cod and salmon from the North Pacific and coastal ...

Reach:9,185,804

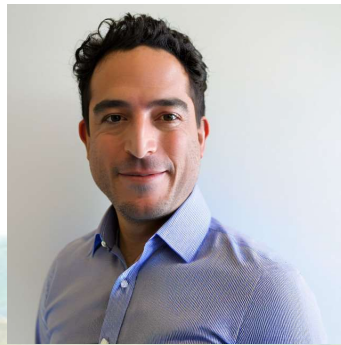




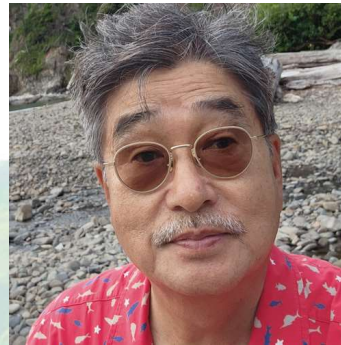
Surimi Experts



**AMIN
NABLI**
Chief Operations
Officer, Aquamar
Holdings, Inc.



**ANGEL
RUBIO**
Economist at
Urner Barry



JAE PARK
Professor of the
Surimi School at
Oregon State
University



**MIKEL
GRANDE**
Chief Marketing
and Innovation
Officer, Angulas
Aguinaga

World Production, 2022

Global surimi production estimates in 2022 suggest a decrease of approximately 3.2 percent compared to 2021, registering about 854 thousand metric tons. We must consider that 2021 was a record year and that a slight downward correction is not out of the norm and is in line with pre-pandemic figures. Such a decline was led by a significant contraction in Alaska Pollock surimi from the U.S. of about 17 percent, from 195 to 161 thousand metric tons in 2022. Japanese pollock surimi production also contracted significantly, from 46 to 30.4 thousand metric tons in 2022. Itoyori production estimates suggest a 9 percent increase from 82 to 89 thousand metric tons in 2022.

Tropical surimi production contracted remained flat at roughly 522 thousand metric tons in 2022. Estimates of Pacific whiting surimi suggest an increase of 22 percent, although we must mention that the margin of error for these estimates is large. (continued on page 2)

Global Surimi Production Estimates by Category

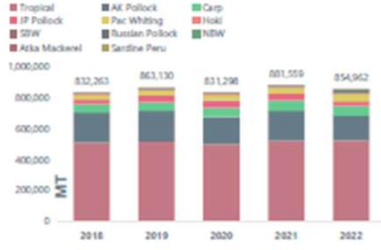


Figure 0. Overall surimi production estimates by species' category. Source: Customs, Uerner Barry Consulting, GAPP.

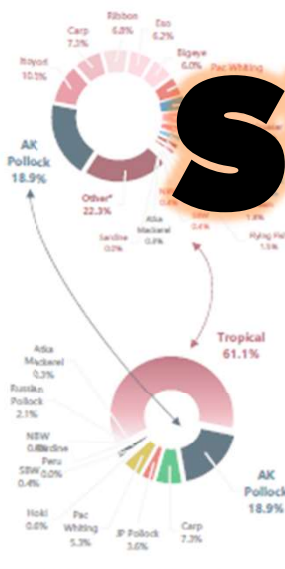


Figure 1 and 2. Pie chart of world surimi production by species and category. Source: Uerner Barry Consulting, GAPP.

	2018	2019	Y-o-Y % Chg	2020	Y-o-Y % Chg	2021	Y-o-Y % Chg	2022	Y-o-Y % Chg
AK Pollock	196,218	199,451	+1.6%	177,520	-11.0%	193,688	+9.1%	161,297	-16.7%
Itoyori	65,014	65,454	+0.7%	63,021	-3.7%	82,343	+30.7%	89,050	+8.0%
Carp	54,903	55,940	+1.9%	58,797	+5.0%	65,534	+11.5%	62,492	-4.6%
JP Pollock	29,002	42,420	+46.0%	46,561	+10.2%	46,274	-1.5%	30,469	-34.2%
Pac Whiting	30,415	33,341	+9.6%	36,354	+9.0%	37,349	+2.7%	45,594	+22.1%
Hoki	6,300	7,252	+15.1%	6,379	-12.0%	5,612	-12.0%	5,380	-3.9%
SWW	4,543	4,414	-2.8%	3,808	-13.7%	3,464	-9.0%	3,752	+8.3%
NBW	2,605	2,745	+5.0%	1,852	-31.5%	2,971	+60.5%	3,130	+5.3%
Alaska Mackerel	758	817	+7.8%	1,110	+35.9%	1,163	+4.8%	2,312	+98.8%
Sardine	224	1,980	+782.1%	640	+32.1%	719	+12.3%	408	-43.3%
Other*	203,527	205,432	+1.0%	196,056	-4.6%	187,930	-4.5%	196,871	+4.8%
Total	832,263	863,130	+3.7%	831,298	-3.7%	881,559	+6.0%	854,962	-3.0%

Other includes all tropical surimi produced in China, as well as surimi and other species not listed nearby for tropical surimi.

Table 1. World surimi production estimates by species. Source: Uerner Barry Consulting, GAPP.

	2018	2019	Y-o-Y % Chg	2020	Y-o-Y % Chg	2021	Y-o-Y % Chg	2022	Y-o-Y % Chg
Tropical	527,056	516,340	-1.9%	498,003	-5.6%	521,265	+4.7%	522,441	+0.2%
AK Pollock	196,218	199,451	+1.6%	177,520	-11.0%	193,688	+9.1%	161,297	-16.7%
Carp	54,903	55,940	+1.9%	58,797	+5.0%	65,534	+11.5%	62,492	-4.6%
JP Pollock	29,002	42,420	+46.0%	46,561	+10.2%	46,274	-1.5%	30,469	-34.2%
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Hoki	6,300	7,252	+15.1%	6,379	-12.0%	5,612	-12.0%	5,380	-3.9%
SWW	4,543	4,414	-2.8%	3,808	-13.7%	3,464	-9.0%	3,752	+8.3%
Russian Pollock	70	27	-61.4%	54	+100.0%	3,474	+6343.1%	17,754	+411.9%
NBW	2,605	2,745	+5.0%	1,852	-31.5%	2,971	+60.5%	3,130	+5.3%
Alaska Mackerel	758	817	+7.8%	1,110	+35.9%	1,163	+4.8%	2,312	+98.8%
Sardine Peru	224	1,980	+782.1%	640	+32.1%	719	+12.3%	408	-43.3%
Total	832,263	863,130	+3.7%	831,298	-3.7%	881,559	+6.0%	854,962	-3.0%

Table 2. World surimi production estimates by species' category. Source: Uerner Barry Consulting, GAPP.

Alaska Pollock Surimi Production

Continued from page 1 ... Finally, we added Russian pollock surimi to the mix, which assumes that volumes imported by declaring countries from this origin should add to total production. As such, Russian pollock surimi production estimates suggest 2022 ended at about 17.7 thousand metric tons in 2022.

Alaska Pollock Surimi

We presented preliminary year-end production figures for Alaska pollock surimi in our last report, and the final figures point out a significant decrease of 17 percent from the previous year. Preliminary figures for 2023 indicate a considerable increase in Q1 compared to the previous three years.

	2018	2020	'20 vs. '18	2021	'21 vs. '20	2022	'22 vs. '21	2023	'23 vs. '22
Q1	78,451	73,647	-6.1%	59,033	-19.8%	65,191	+10.4%	75,954	+16.5%
Q2	26,448	14,890	-43.7%	32,804	+120.3%	15,211	-53.6%		
Q3	86,666	69,935	-19.3%	95,932	+37.2%	78,865	-17.8%		
Q4	4,653	19,048	+309.4%	5,919	+68.9%	2,030	-65.7%		
Total	196,218	177,520	-9.5%	193,688	+9.1%	161,297	-16.7%		
YTD	78,451	73,647	-6.1%	59,033	-19.8%	65,191	+10.4%	75,954	+16.5%

Table 3. Alaska Pollock Surimi Production by Quarter. Source: NOAA Fisheries, Uerner Barry. Q4 2021 data is complete.

US Production Alaska Pollock Surimi

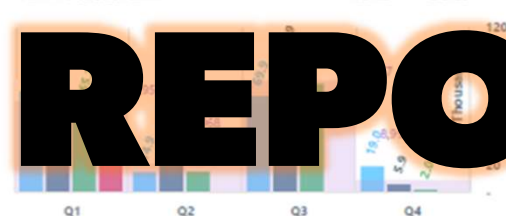


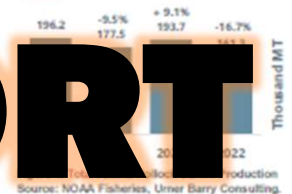
Figure 3. Alaska Pollock Surimi Production by Quarter. Source: NOAA, Uerner Barry. Q4 2021 data is complete.

US Production Alaska Pollock Surimi



Figure 5. Alaska Pollock Surimi Production by Quarter, linear. Source: NOAA Fisheries, Uerner Barry. *Q2 2023 data is incomplete.

US Production Total



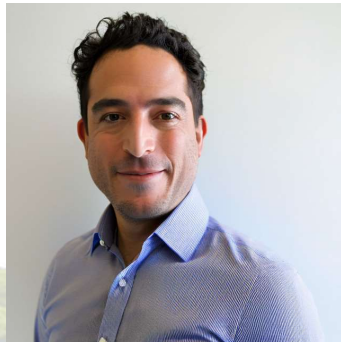
Alaska Pollock Surimi from week 1 to week 15



Figure 4.1 Alaska Pollock Surimi Production and YTD through week 15. Source: NOAA Fisheries, Uerner Barry Consulting.



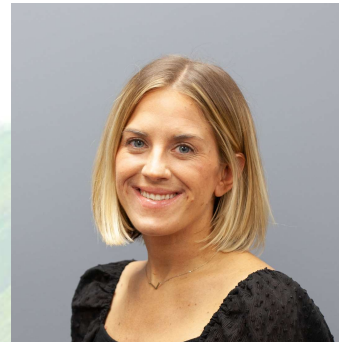
The Team from Urner Barry



Angel Rubio
Economist at Urner
Barry



Amanda Buckle
Managing Editor,
SeafoodNews.com
at Urner Barry



Lorin Castiglione
Seafood Market
Reporter and
Marketing Lead,
Urner Barry

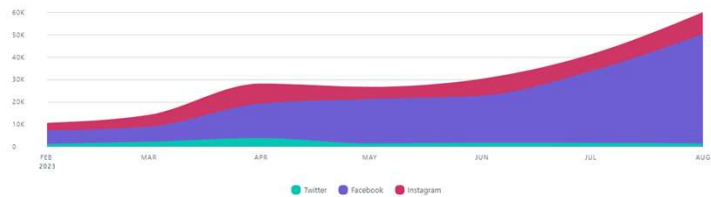


Jon Ochoa, GAPP

Impressions

Review how your content was seen across networks during the reporting period.

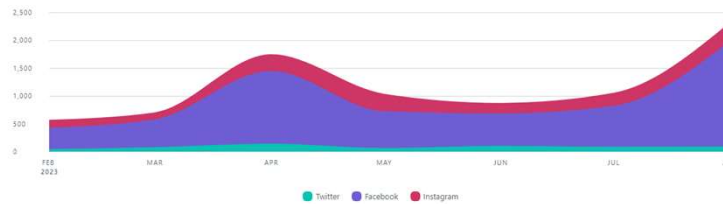
Impressions, by Month



Engagement

See how people are engaging with your posts during the reporting period.

Engagements, by Month



Facebook Engagement Rate increase of 284.1% on the year

Instagram Engagement Rate increase of 463.9% on the year

Up on Engagements, Impressions, Reach and up 1,310% on clicks to our "Where to buy" Section through social media channels

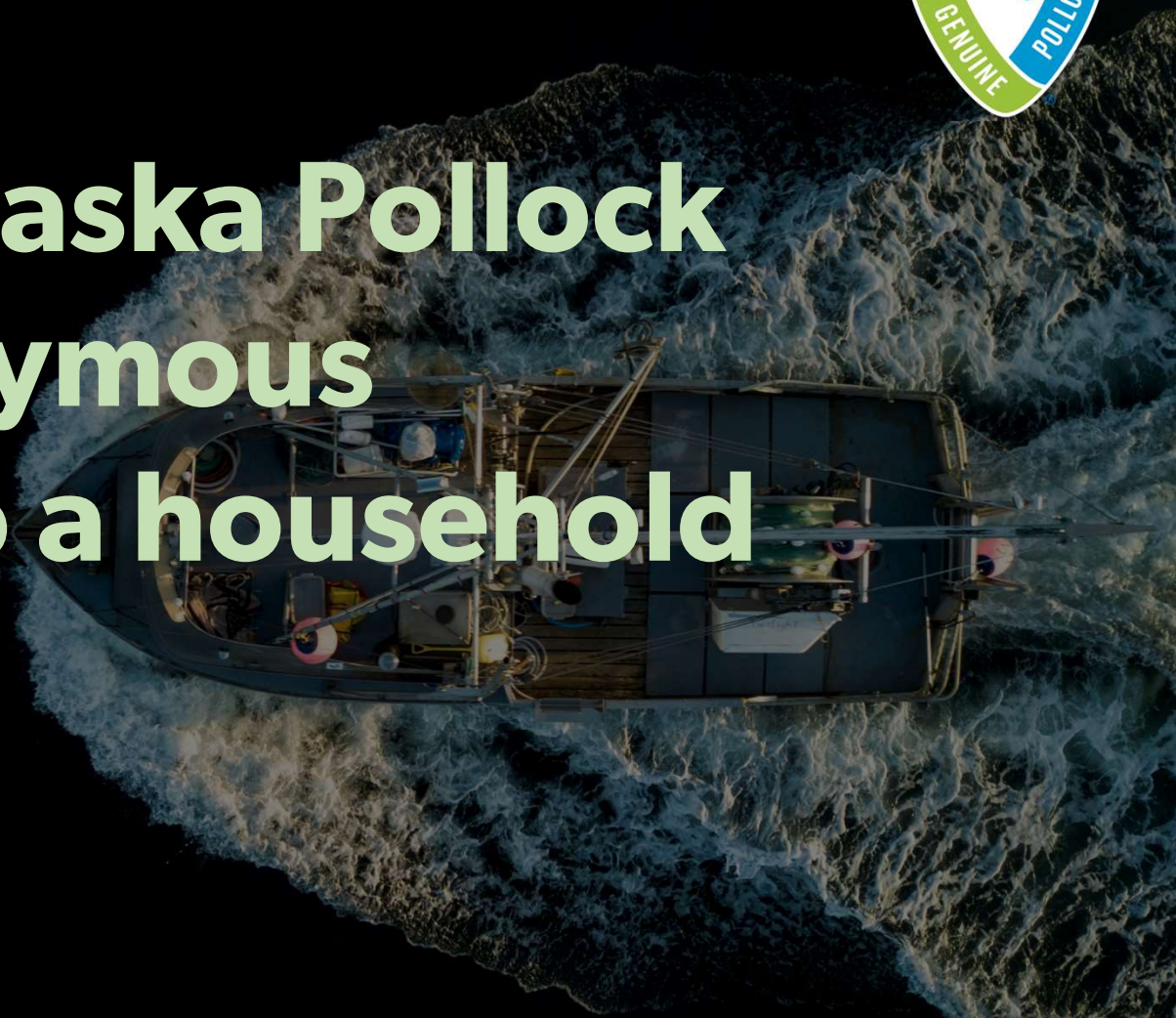


**THANK YOU TO ALL OF OUR
GAPP COMMITTEES!**





**“Turn Wild Alaska Pollock
from an anonymous
whitefish into a household
name”**







Wild Alaska Pollock familiarity Continues Moving Up With U.S. Fish Eaters!



Arrows indicate a statistically significant change compared to 2022. 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: Fish Eaters 2023 (n=598); 2022 (n=640); 2021 (n=669); 2020 (n=764); 2019 (n=850)

Q6. Based on everything you know about Wild Alaska Pollock, what is your overall opinion of it? Base: Fish Eaters aware of Wild Alaska Pollock 2023 (n=394); 2022 (n=419); 2021 (n=415); 2020 (n=449) and Millennial Fish Eaters aware of Wild Alaska Pollock 2023 (n=132), 2022 (n=120)



THANK YOU GAPP BOARD OF DIRECTORS!



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THANK YOU TO OUR ASSOCIATE MEMBERS!





IT'S ALL ABOUT THE PEOPLE



WILD ALASKA POLLOCK

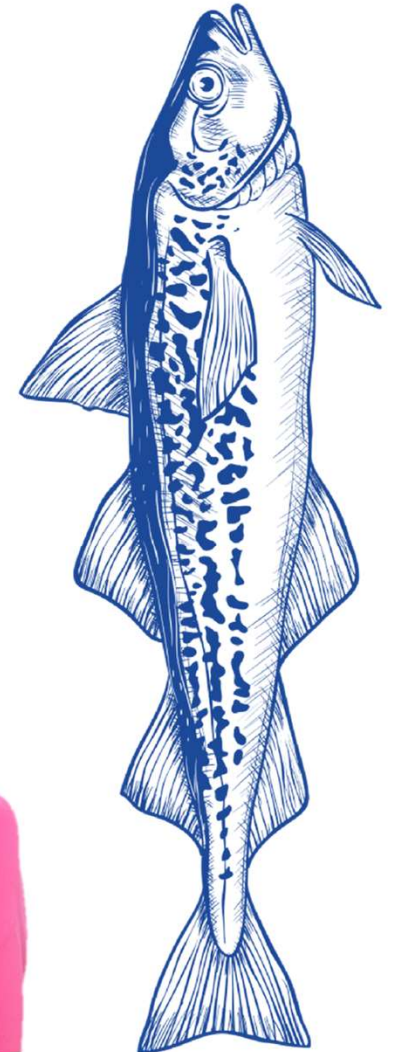


ANNUAL
MEETING
2023



THANK YOU!

**BACK
BETTER
THAN
EVER**





Remarks from our Master of Ceremonies

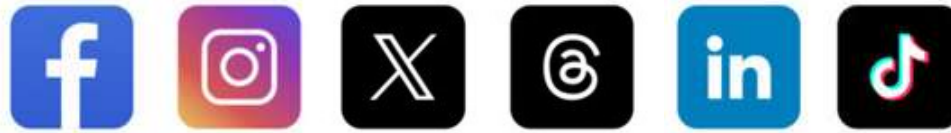
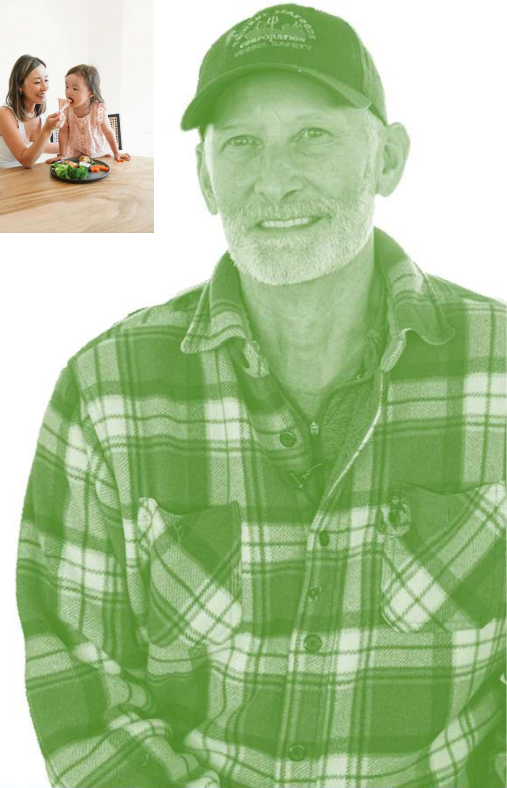
Amanda Buckle, SeafoodNews

PLEASE SILENCE YOUR PHONES





Dive into the Fun at #GAPPAM2023! Let's Get Social!



@WildAKPollock



Let's Get Talkin' About #WildAlaskaPollock!

Tag us on your pictures from today to share the wonders of Wild Alaska Pollock! Let's net-work!

#GAPPAM2023

@WildAKPollock



#GAPPAM2023

#GAPPAM2023

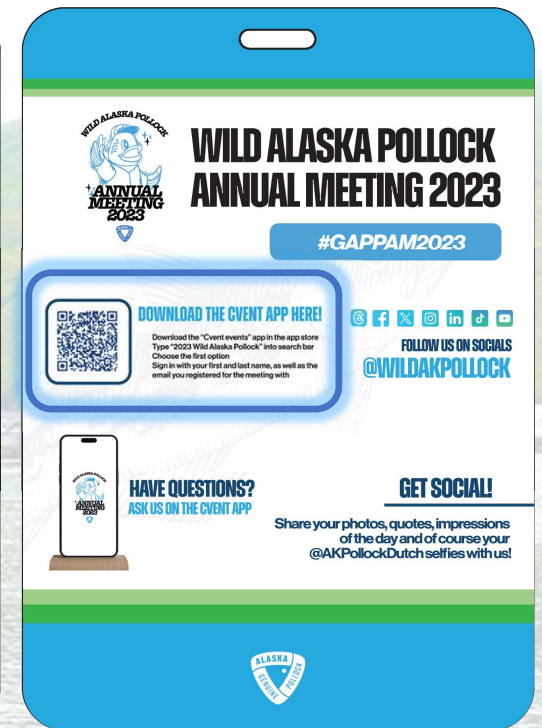
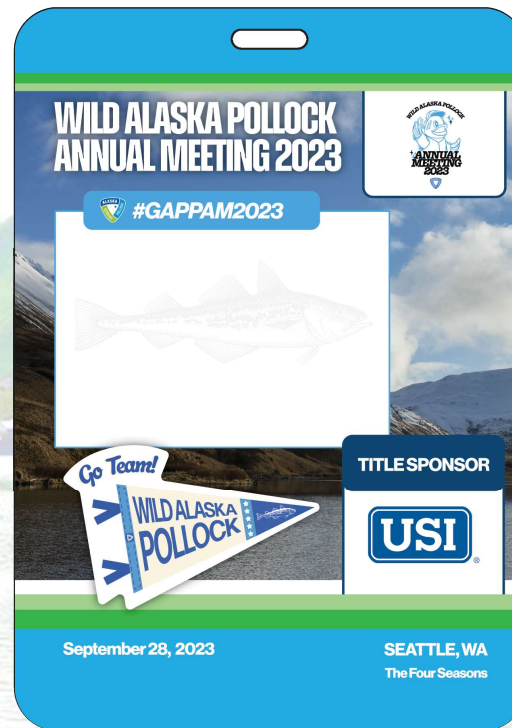
#GAPPAM2023



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Welcome to our Virtual Attendees!





Wild Alaska Pollock Fishery & Trade Update

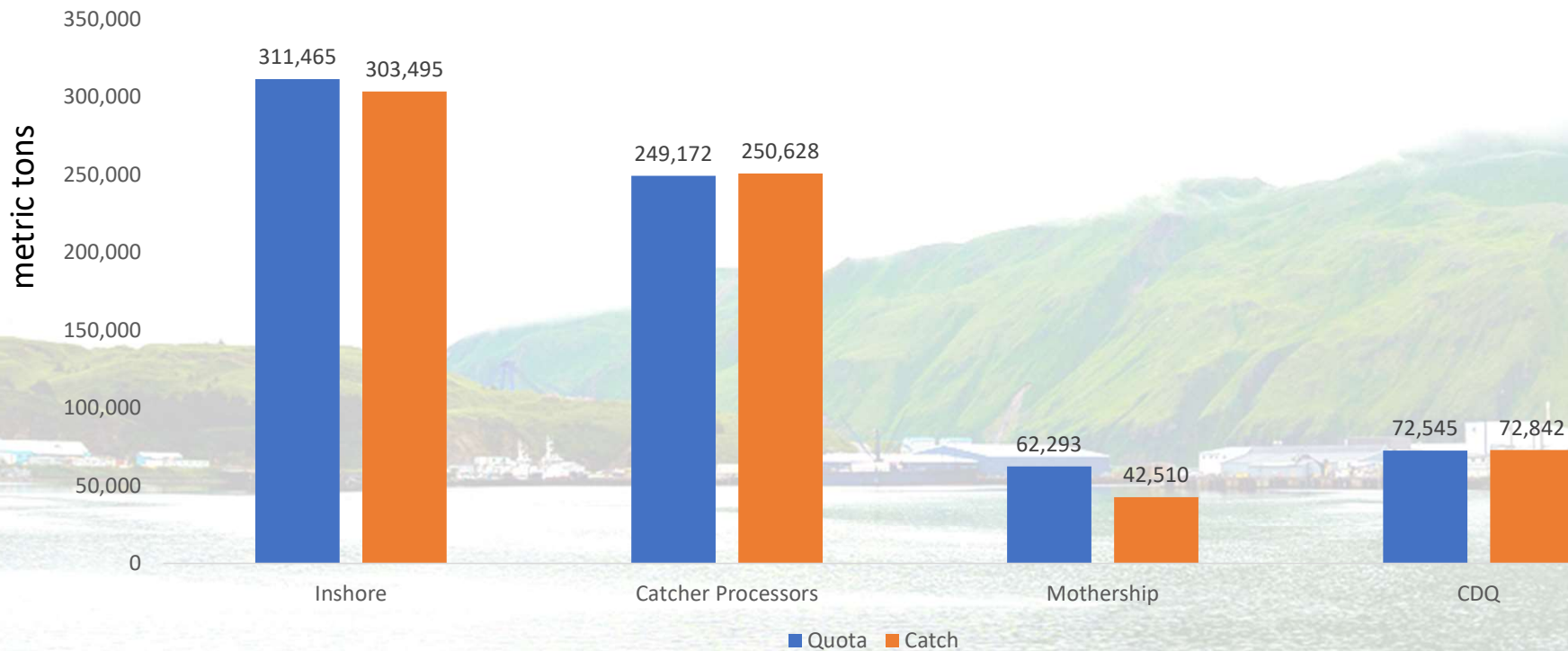
Ron Rogness, GAPP



Fishery Performance

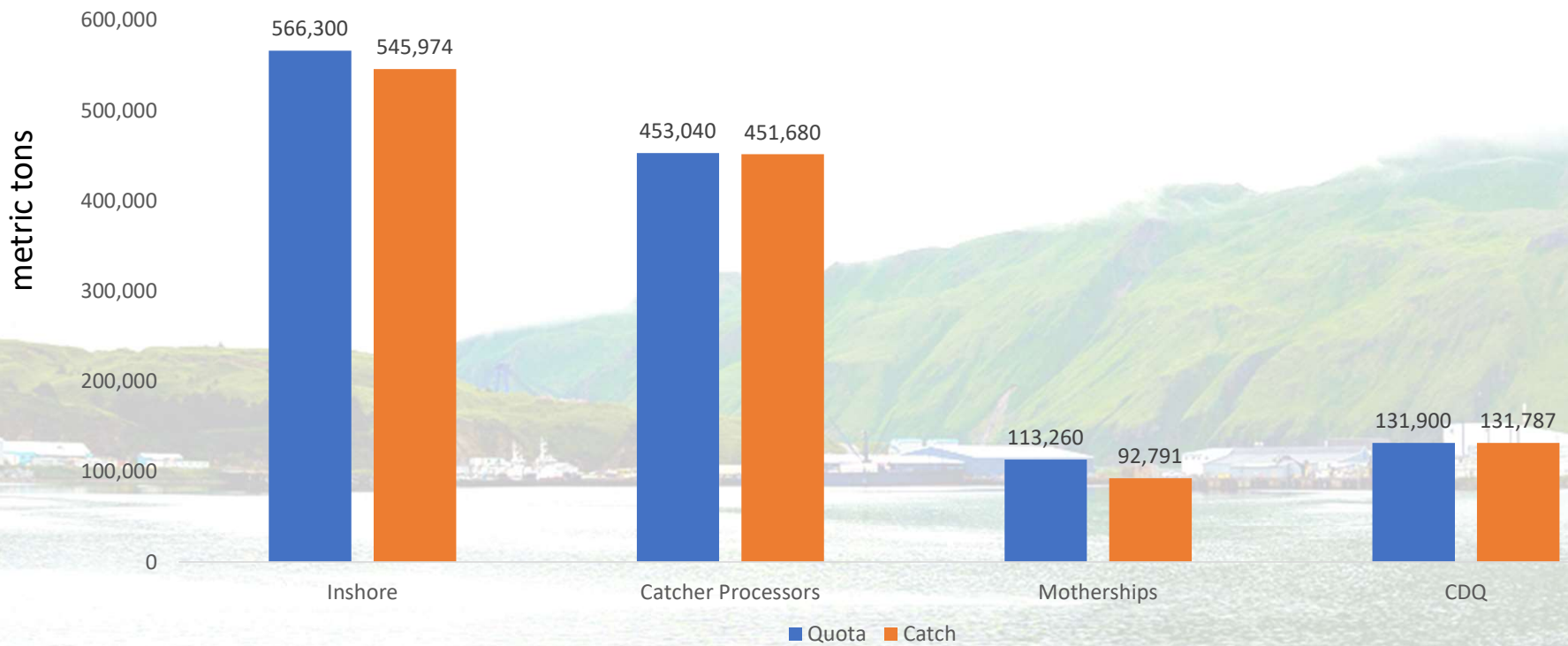


Bering Sea B Season winding down (catches as of 9/16)



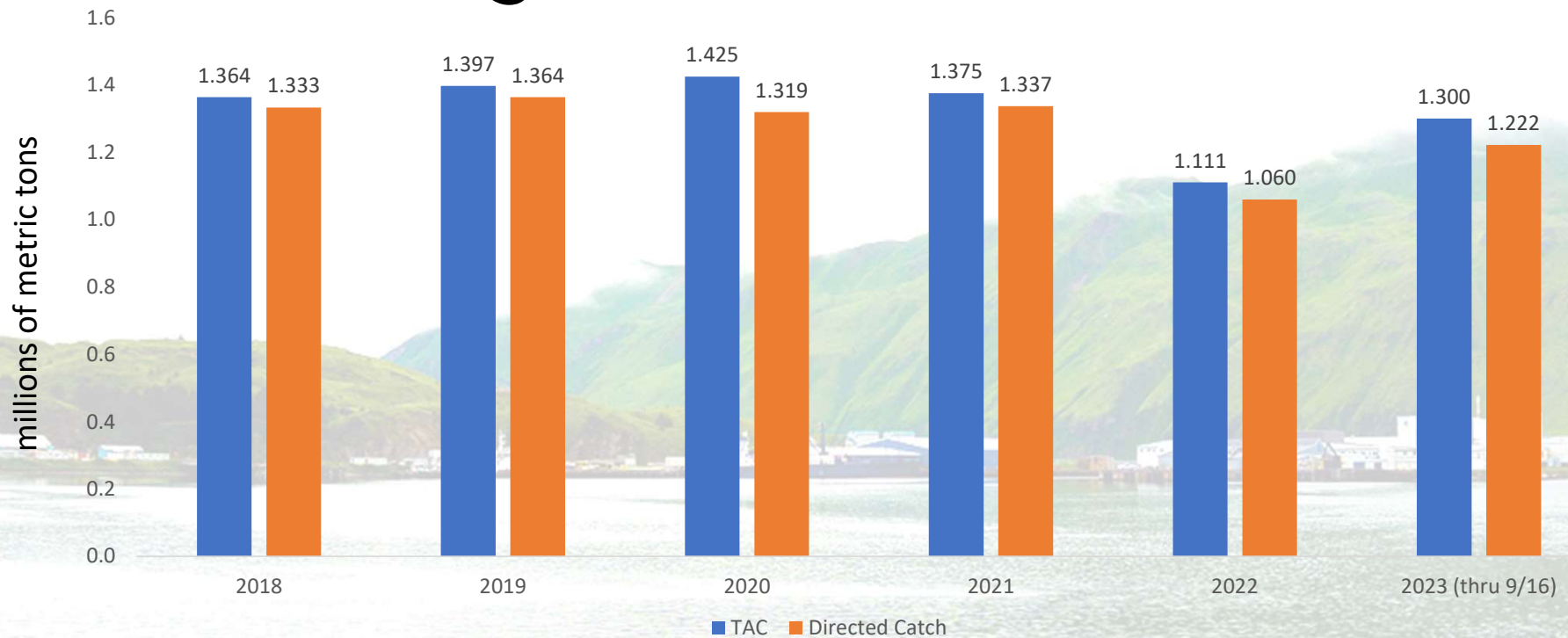
Source: NOAA Fisheries, AK Region

Annual catch in 2023 is at 96.7 percent of quota as of 9/16



Source: NOAA Fisheries, AK Region

Over the past five years, directed catch has averaged over 96 percent of the TAC in the Eastern Bering Sea



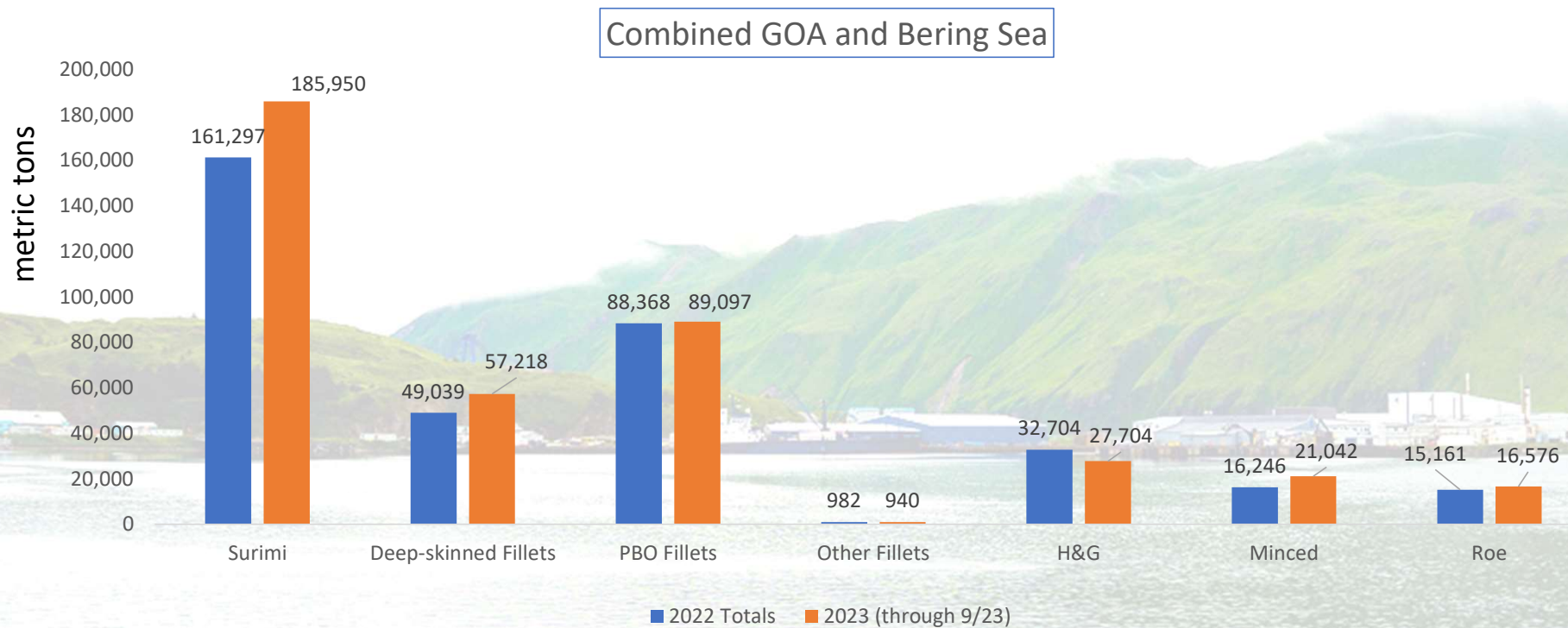
Source: NOAA Fisheries, AK Region

Over the past five years, directed catch has averaged over 96 percent of the TAC in the Central and Western Gulf of Alaska



Source: NOAA Fisheries, AK Region

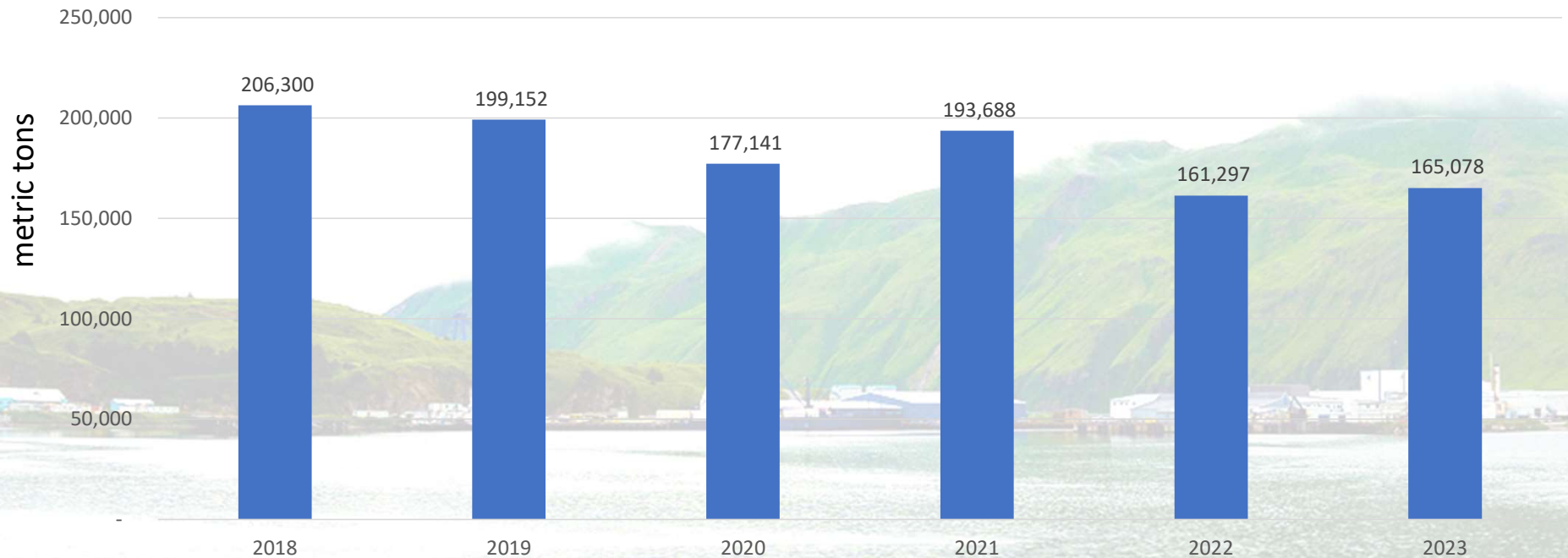
PBO fillet production likely to be moderately higher by season's end, surimi and deep-skinned increased by less than the percentage of quota increase



Source: NOAA Fisheries, AK Region

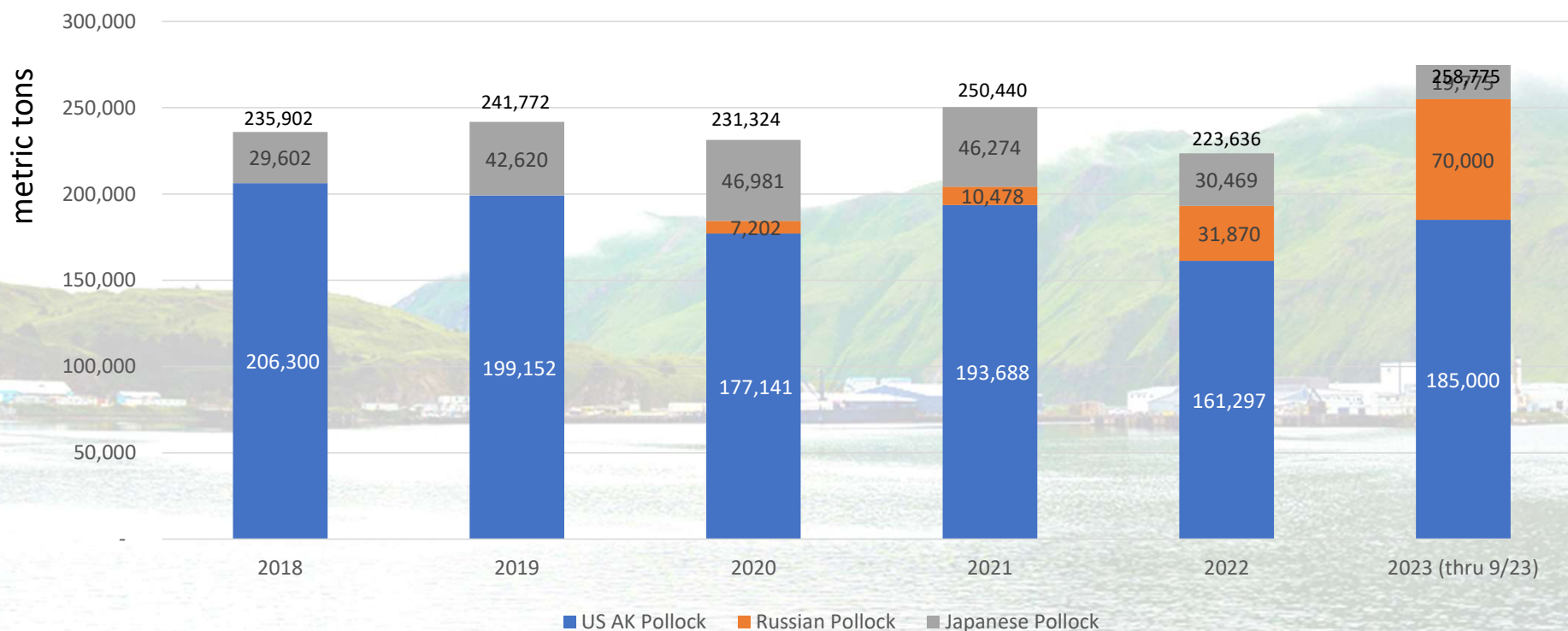
Surimi production in 2022 and 2023 is 15% lower than the average of the prior four years

US Surimi Production



Source: NOAA Fisheries, AK Region

IF Russian estimates in 2023 are correct, and Japanese Pollock surimi reduction in Q1 holds true, 2023 Pollock/AK Pollock surimi will be 15.7% higher than in 2022, but only 3.3% higher than in 2021



Source: NOAA Fisheries, AK Region

As a percent of catch, surimi production is down from the averages of earlier years, but has been relatively flat the last three



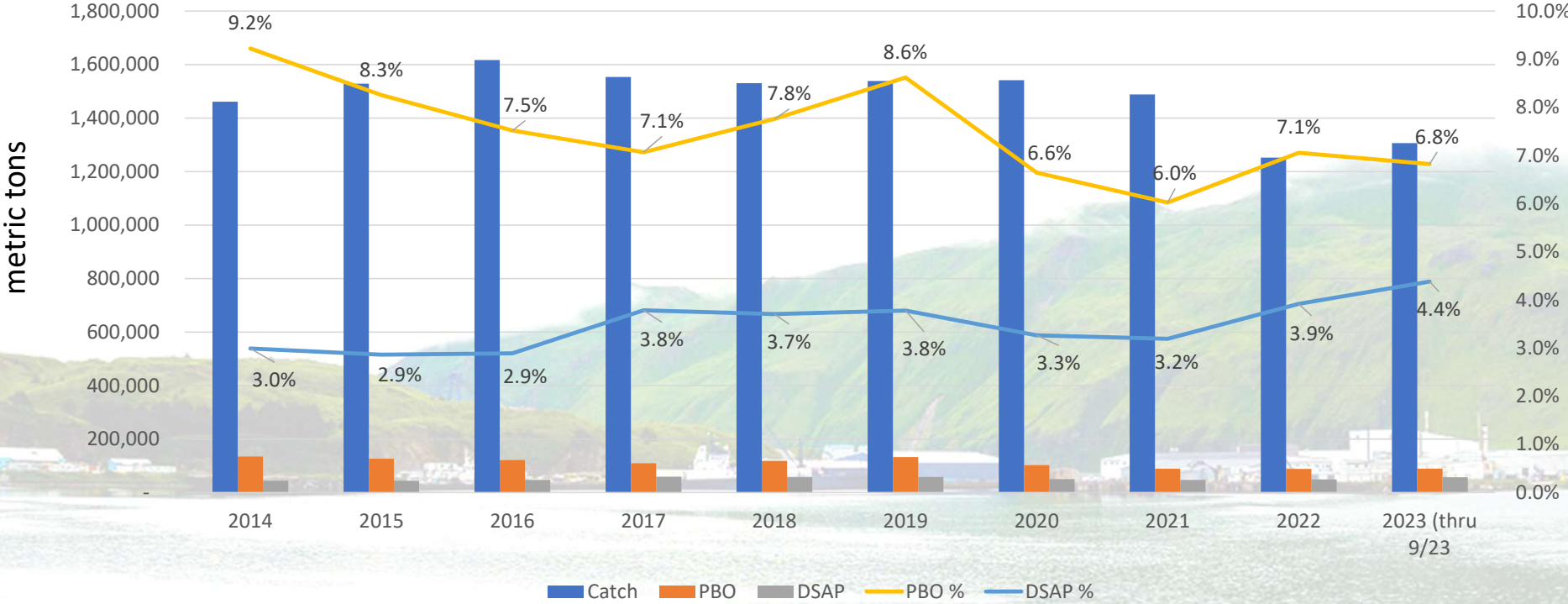
Source: NOAA Fisheries, AK Region

Historically, deep-skinned has represented about 30% of total fillet production, but is 40% in 2023



Source: NOAA Fisheries, AK Region

PBO production as a percentage of catch is declining and is being replaced by increased DSAP production



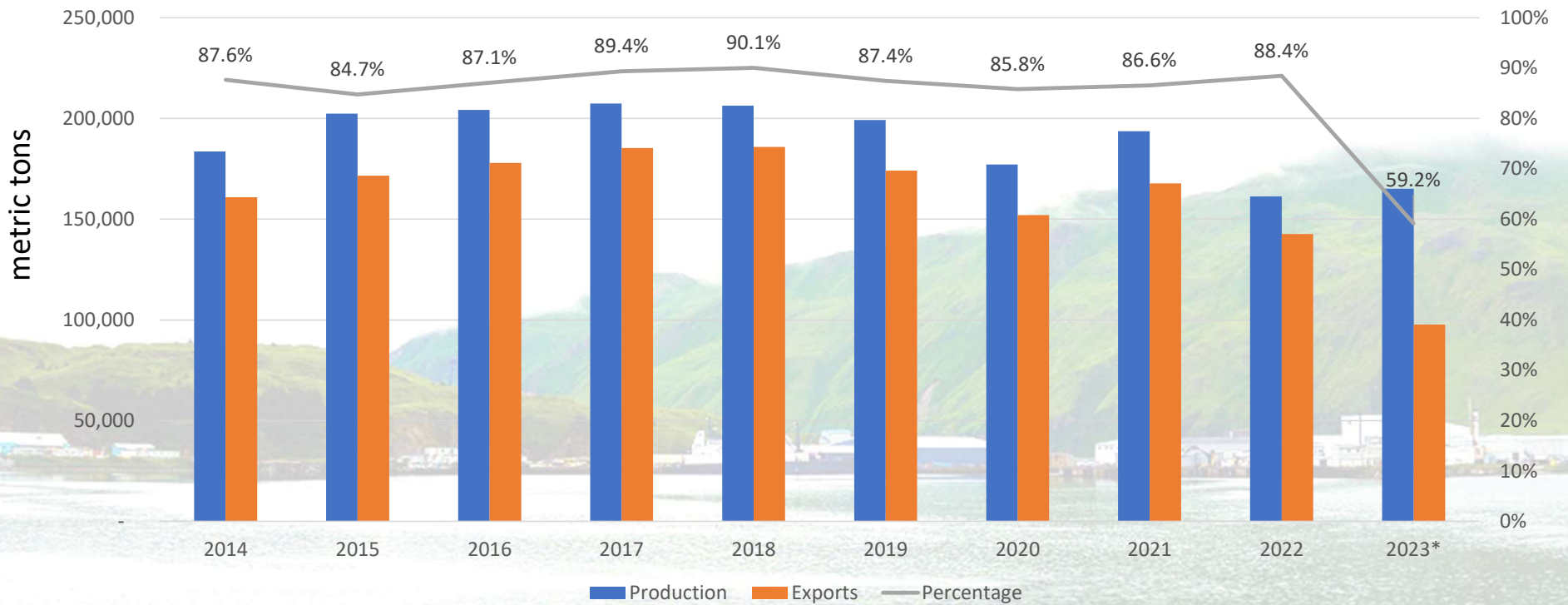
Source: NOAA Fisheries, AK Region



Trade Update: U.S. Exports

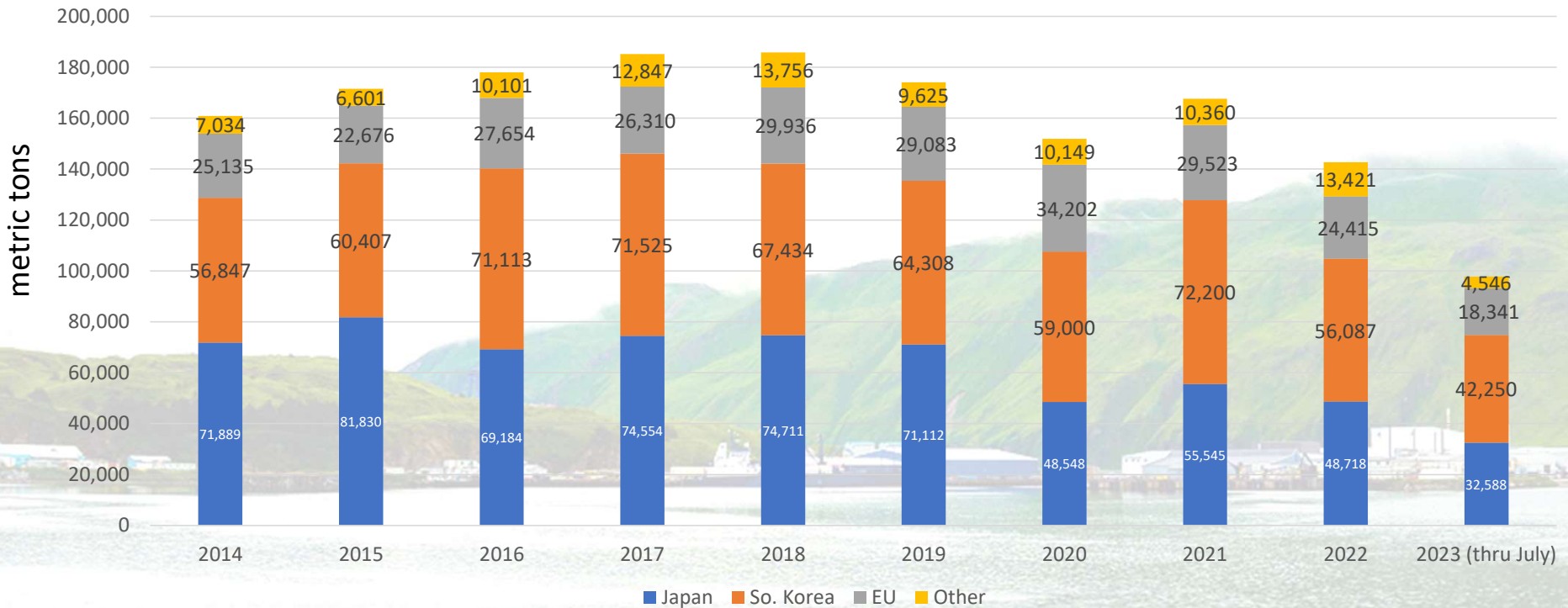


Surimi continues to be primarily an export market with last year having the highest percentage of exports since 2018



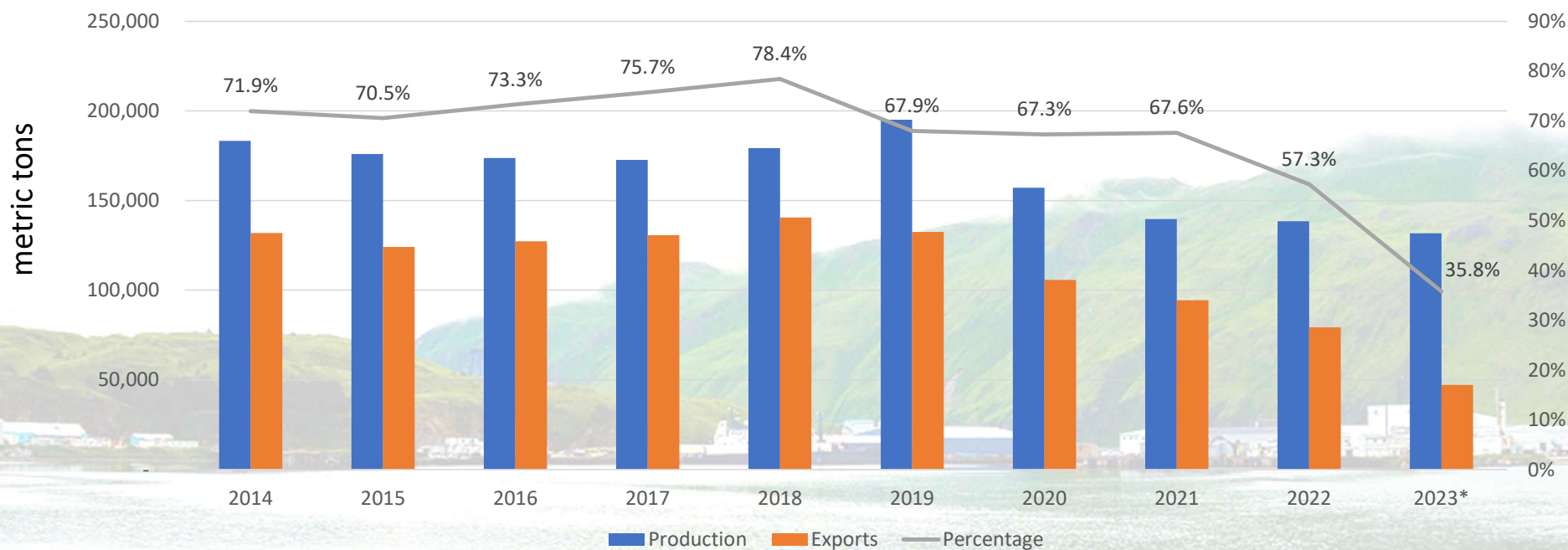
Source: US Census Bureau, NOAA Fisheries, AK Region

Over the last 10 years, combined exports of surimi to Japan and South Korea have marginally decreased from over 80 percent of total exports to 76 percent



Source: US Census Bureau

The decrease in the percentage of fillet production that is exported reflects the increased emphasis on deep-skinned production



Source: US Census Bureau, NOAA Fisheries, AK Region

The decline in fillet exports since 2018 is dramatic with total exports declining 44 percent while prices jumped by over 40 percent



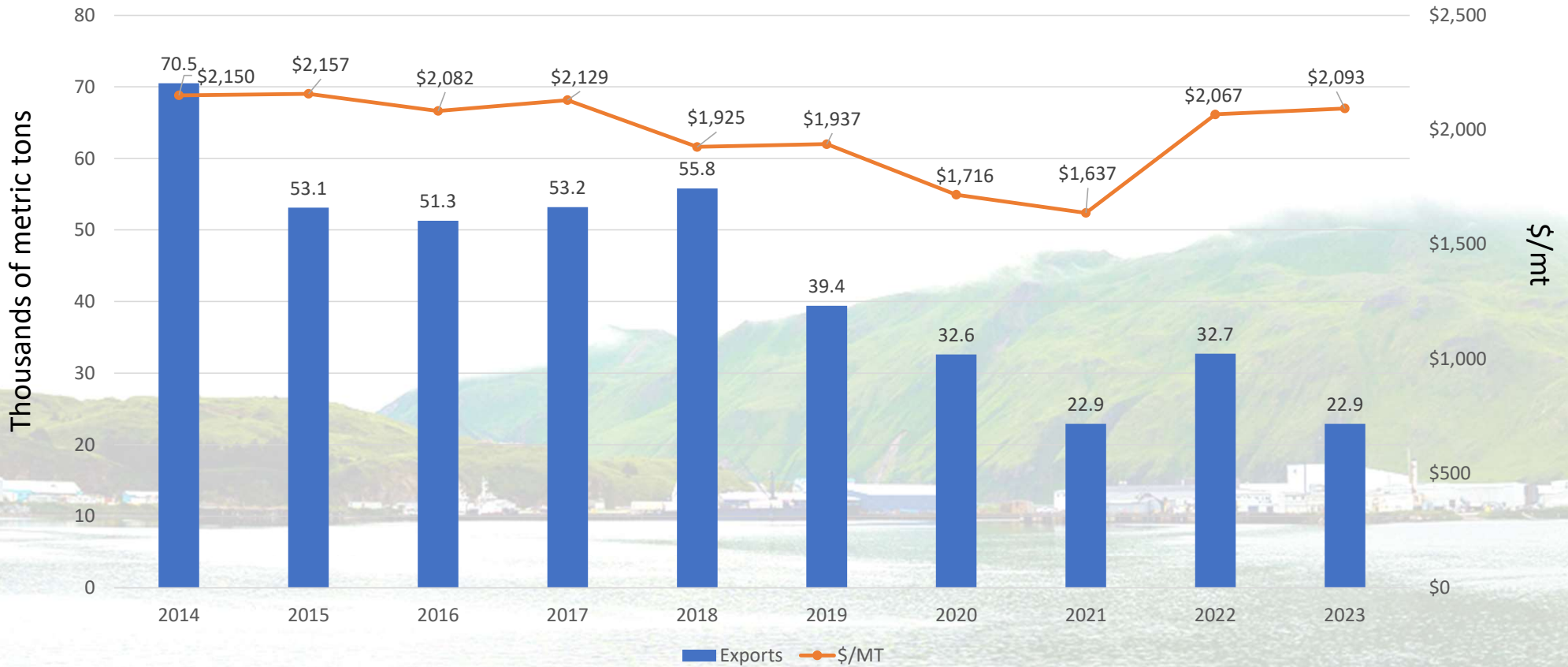
Source: US Census Bureau

Exports of Alaska pollock roe have fallen commensurate with production with prices fairly flat since 2019



Source: US Census Bureau

Headed and gutted exports have followed a similar pattern, but unlike roe, prices have been strong the last two years



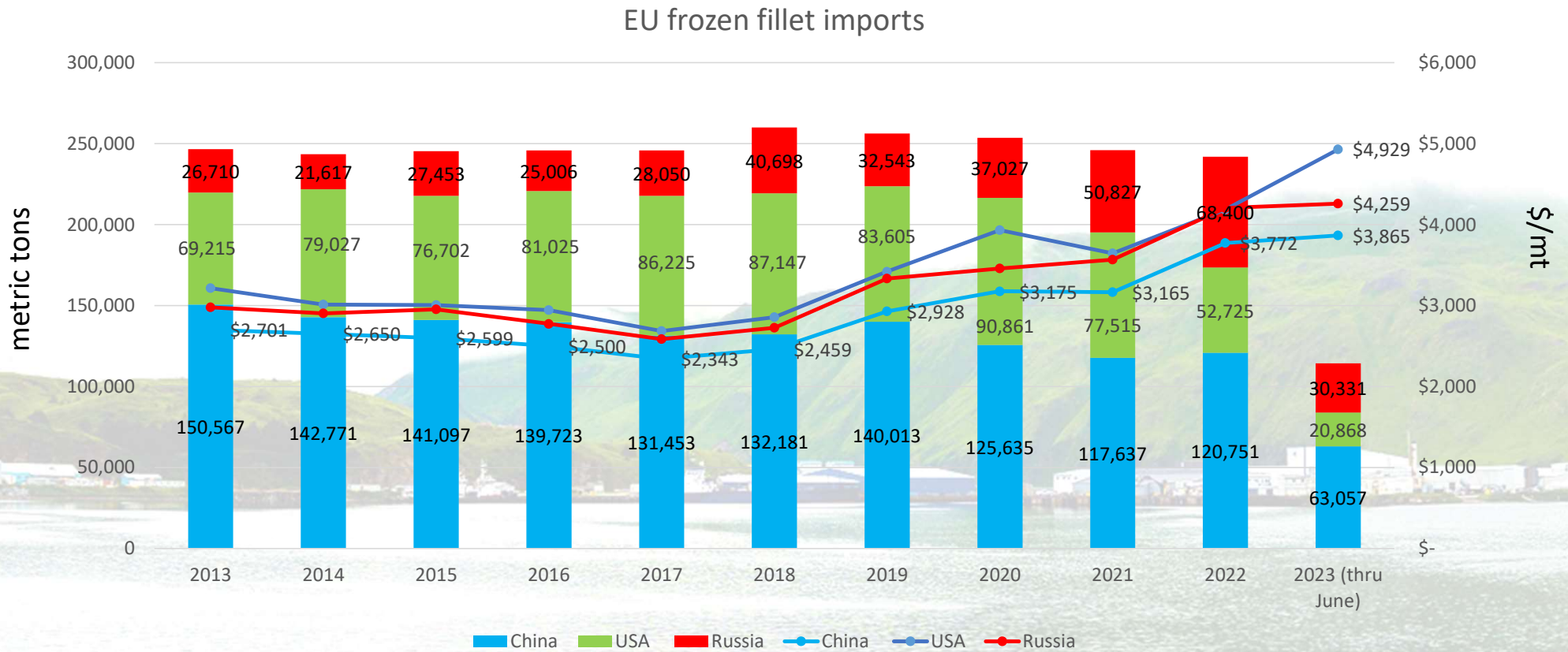
Source: US Census Bureau



Trade Update: EU Imports

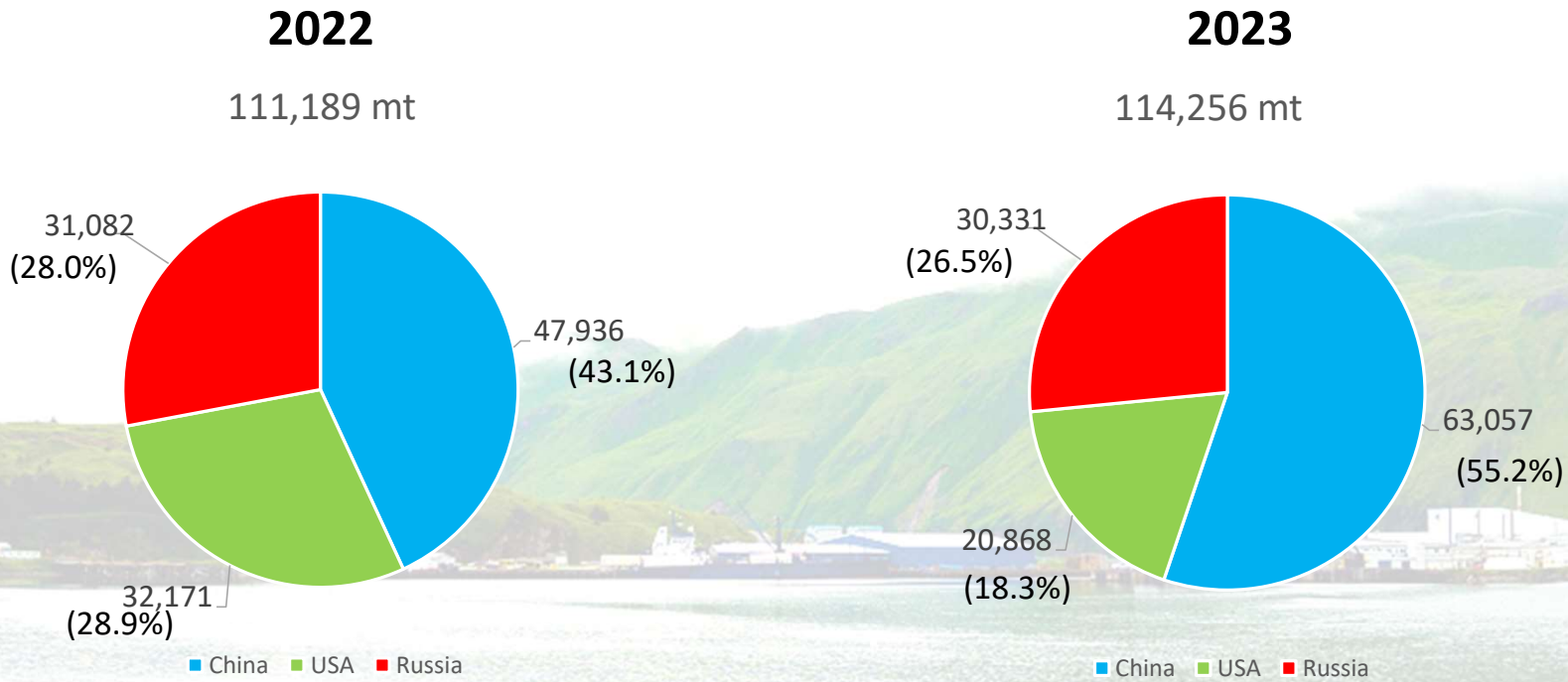


Unlike prices for other proteins and other seafood, pollock/AK pollock prices have been steadily increasing from 2017



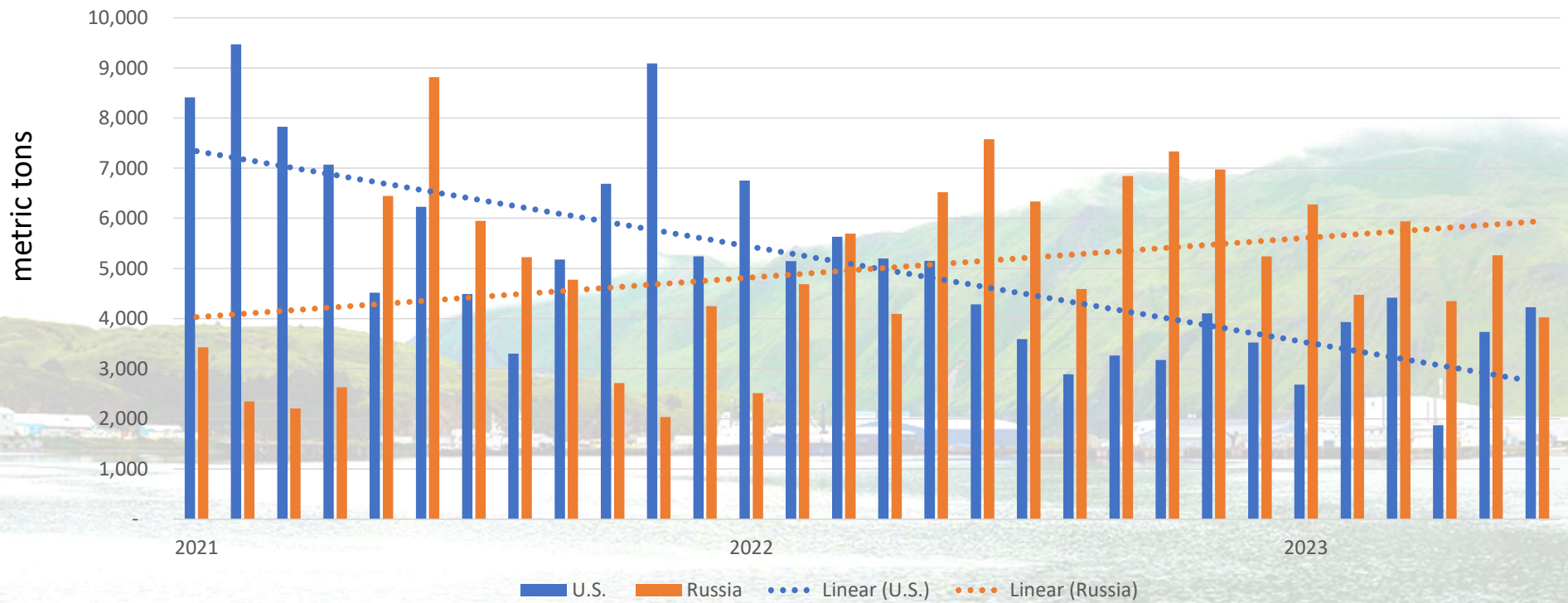
Source: Eurostat

When we compare imports through June for 2022 and 2023, we can see imports of Russian and Chinese fillets gaining market share at higher overall volume



Source: Eurostat

Comparing just Russian and US imports, we can see the clear trend with the inflection point at the beginning of 2022



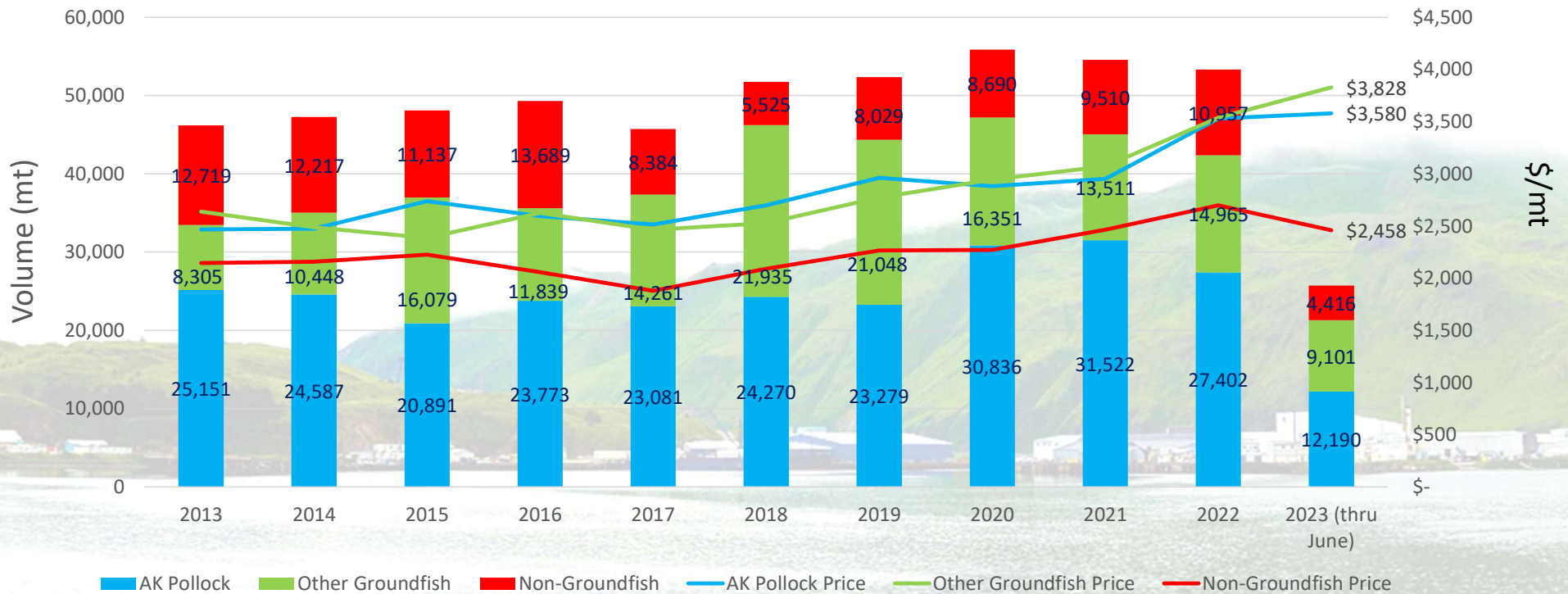
Source: Eurostat

While the year-to-date numbers don't show it, the monthly data shows that prices peaked in late 2022, early 2023



Source: Eurostat

EU Imports of Alaska Pollock Surimi have gained market share at the expense of both Pacific hake surimi and "other" surimi with the price premium for the latter two growing over the last two years



Source: Eurostat

So far in 2023, imports of Alaska pollock surimi are down 12% with a very large jump in Pacific hake surimi imports



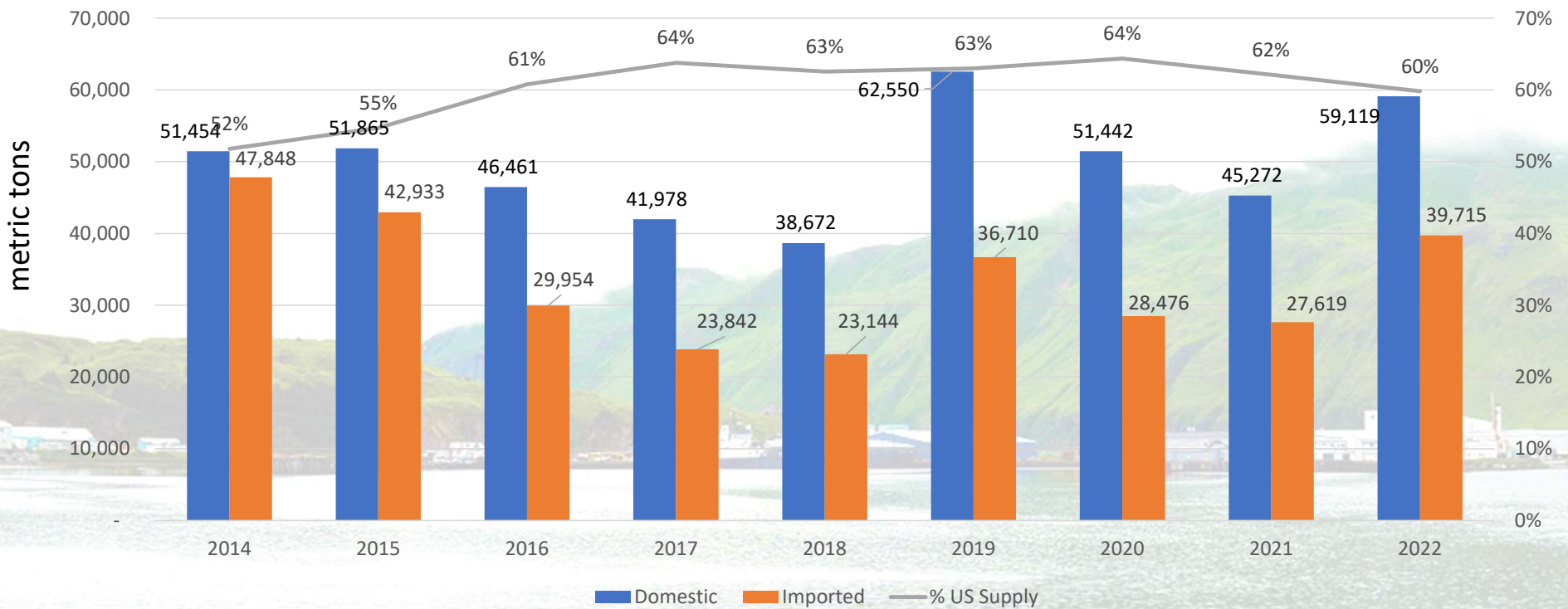
Source: Eurostat



US Supply and Consumption



The overall fillet Supply in 2022 fell just short of the 10 year high in 2019 with the domestic share holding steady between 60 and 65 percent



Source: NOAA Fisheries, Alaska Region, US Census Bureau

Imports of Pollock fillets and blocks were above 30,000 mt for only the second time since 2015



Source: NOAA Fisheries, Alaska Region, US Census Bureau

US imports shifting from blocks to fillets and portions (through at substantially higher prices (data through July))

Blocks



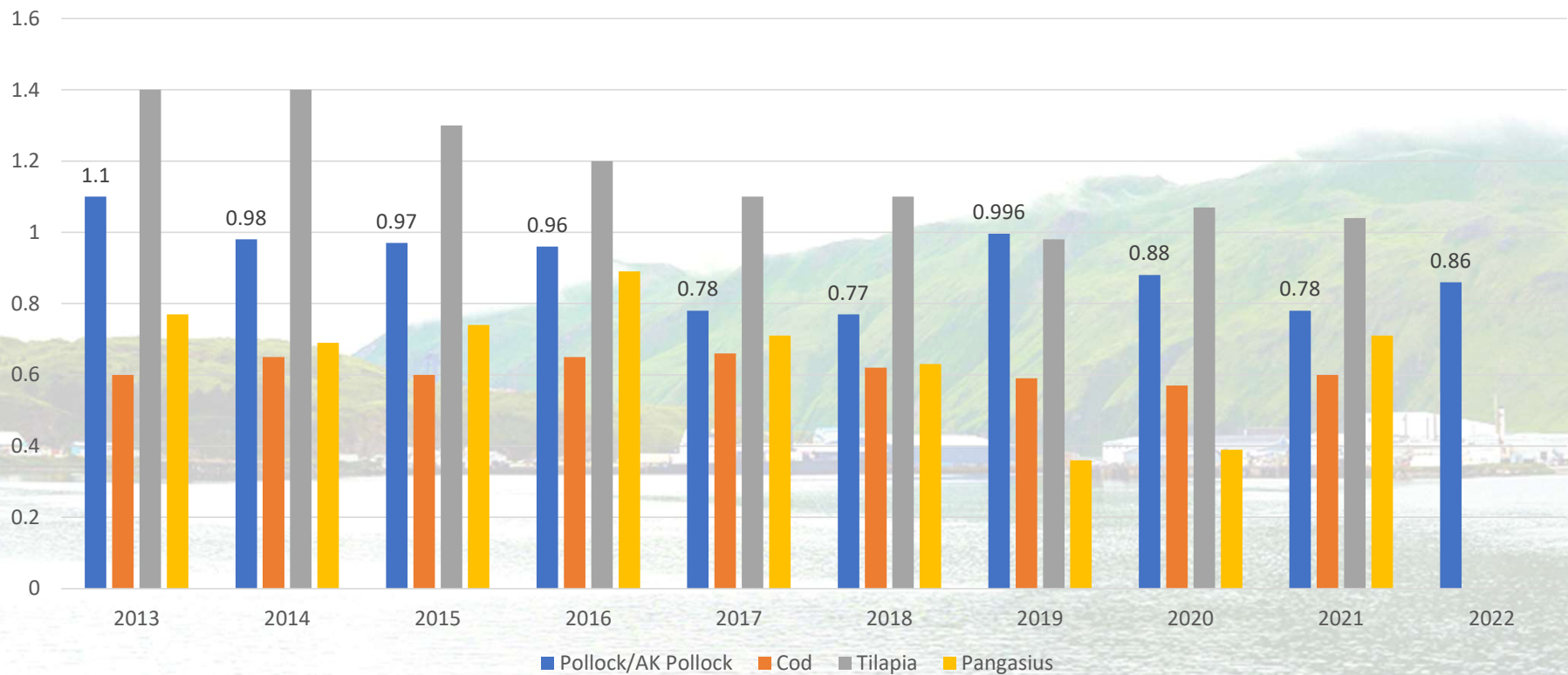
Fillets



Source: NOAA Fisheries, Alaska Region, US Census Bureau

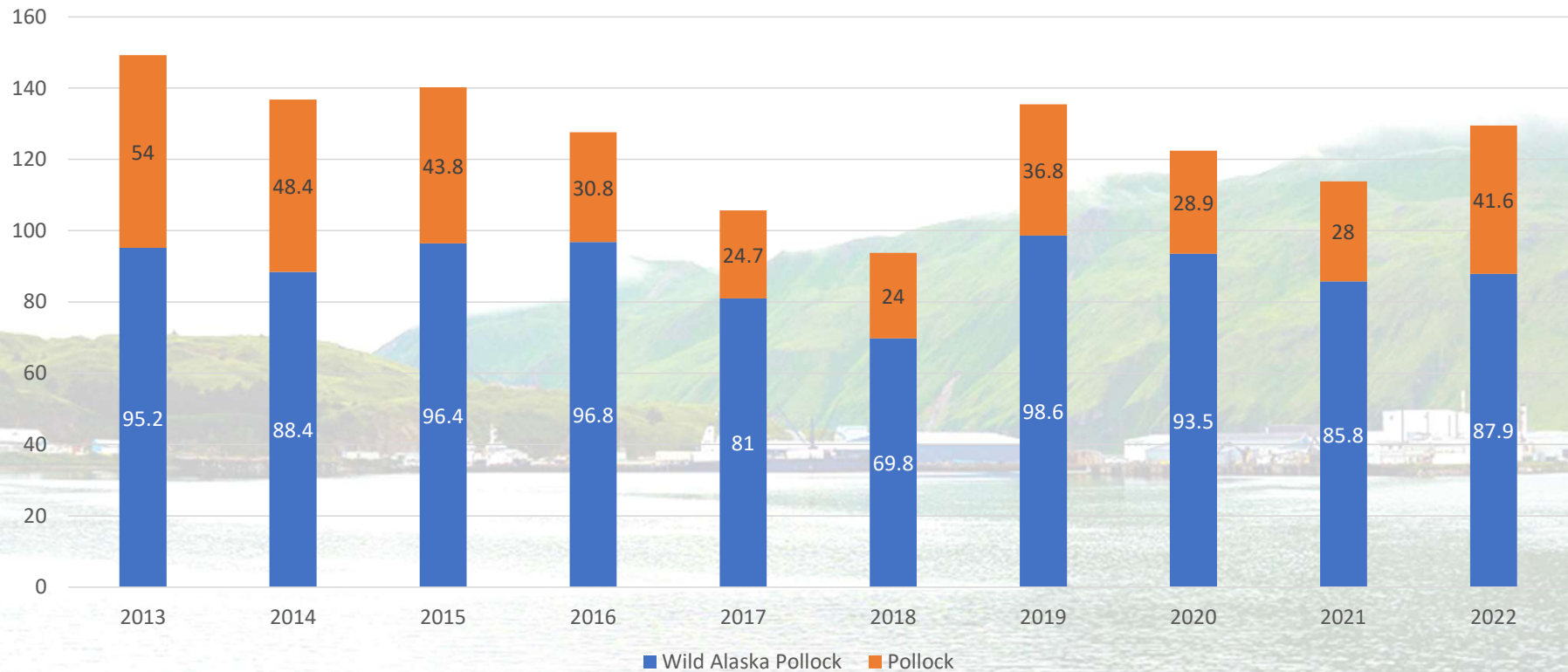
Pollock/AK Pollock is consistently the second most consumed whitefish and the 5th most consumed seafood in the US

U.S. Per Capita Consumption



Two-third to three-fourth of the Pollock/Wild Alaska Pollock consumed in the US is Wild Alaska Pollock

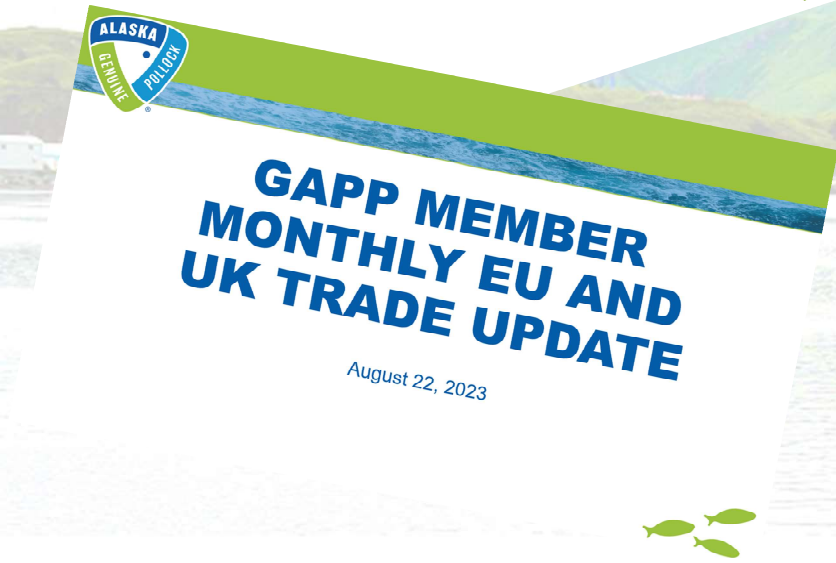
U.S. Supply in thousands of mt



2023 Highlights/Predictions

- Fillet production will likely increase by 3,000 mt (+2.2%) in 2023, but that is still surprising considering the 17 percent increase in quota
- With fillet imports up slightly and fillet exports lagging 2022 by 5,000 mt, I expect the percentage of US fillets to total fillet supply to increase above the 60% of last year
- Surimi production is projected to be approximately 170,000 mt, an increase of just over 9,000 mt from 2022. With exports running +10,000 mt above last year, the amount of the domestic supply of surimi will likely decrease slightly in 2023
- I expect per capita consumption of pollock/AK Pollock to increase next year to just under 0.9 pounds per person

Keep up to date with GAPP's Reports!





Thank You!





Surimi Market and Outlook

Jae Park, Oregon State University;

Angel Rubio, Urner Barry;

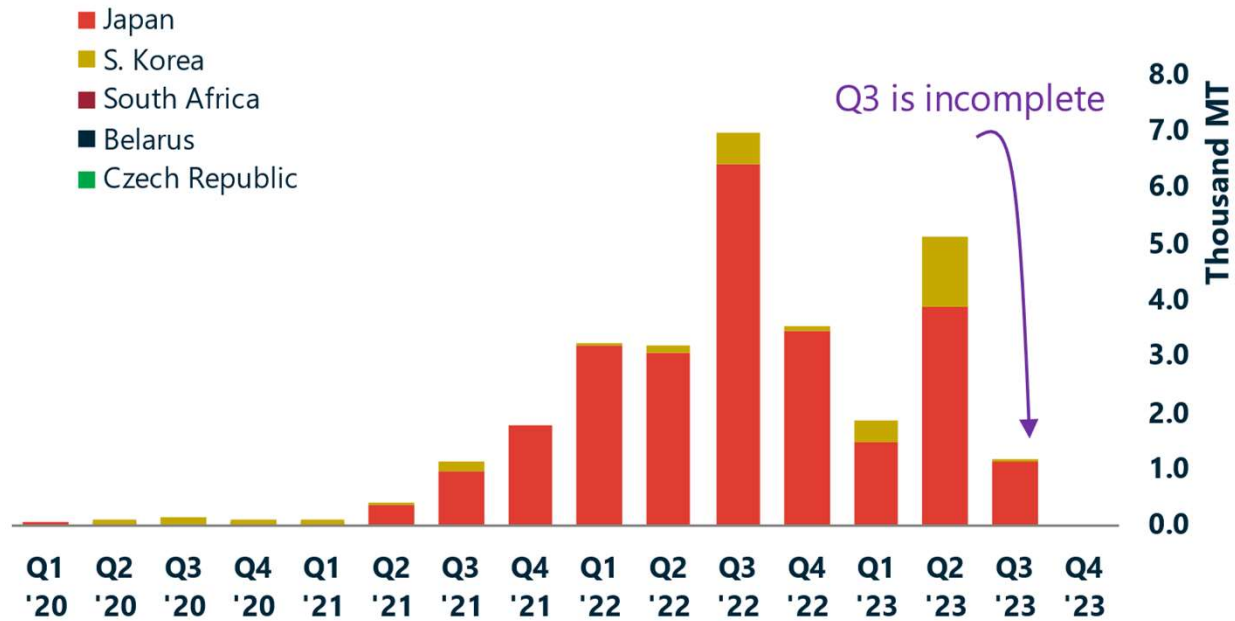
Amin Nabli, Aquamar;

Mikel Grande, Angulas Aguinaga



Russian Imports categorized as "Surimi"

Surimi Imports by Declaring countries from Russia



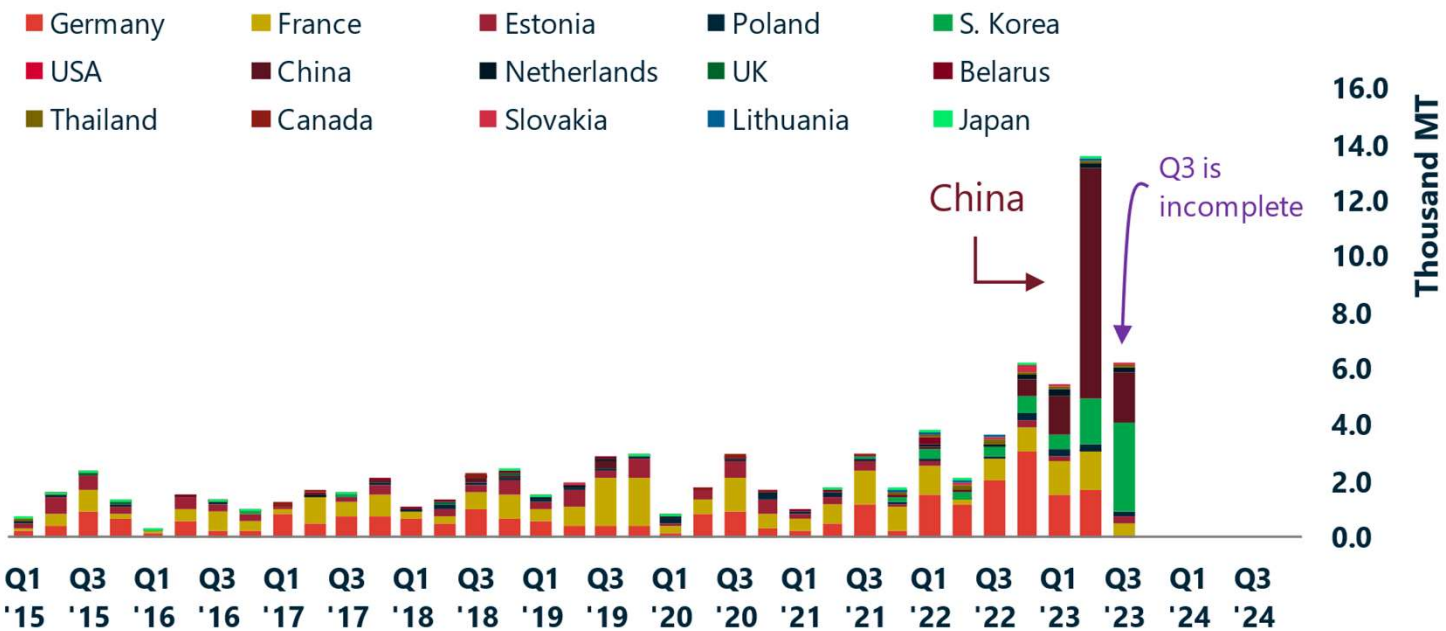
Source: GAPP Surimi Tracker Report





Russian imports categorized as "Pollock, Meat, whether or not minced"

Meat Imports by Declaring countries from Russia



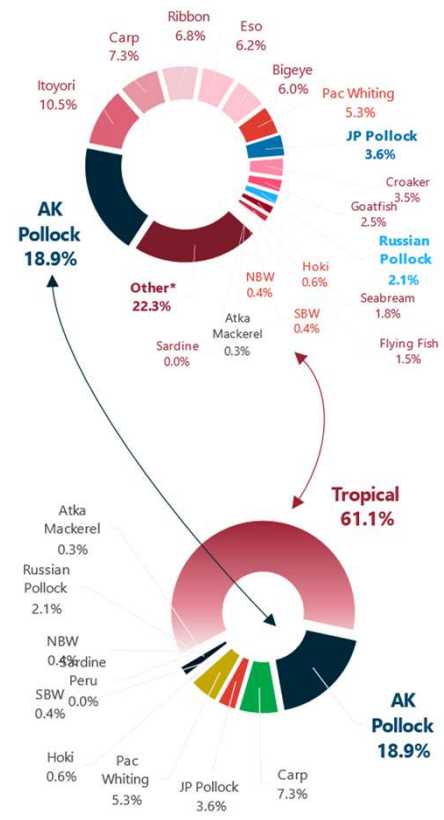
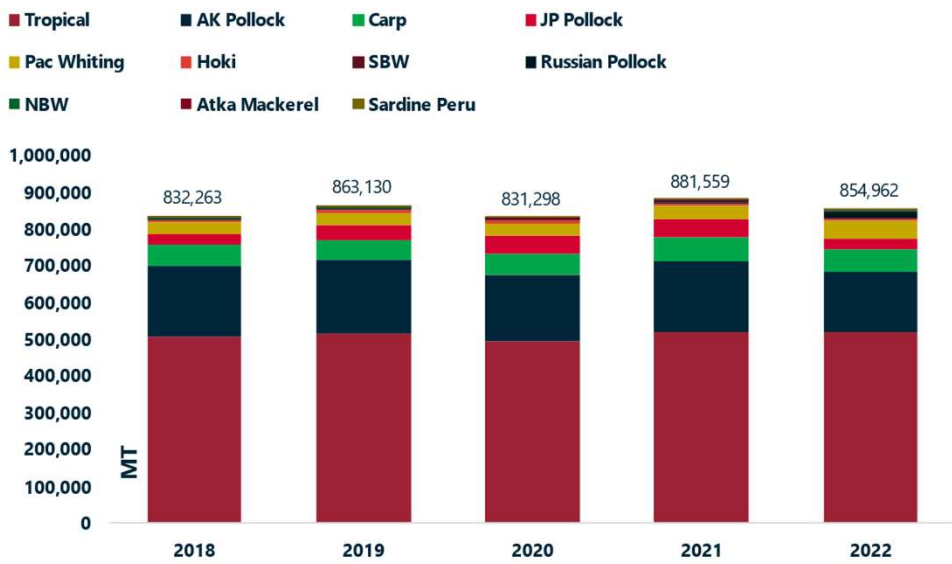
Source: GAPP Surimi Tracker Report





In 2022, there was a slight decrease in overall production, but a large decrease in AKP

Global Surimi Production Estimates by Category



- Alaskan Pollock → ~ -16% (-33K MT)
- Russian Pollock → ~ (+17K MT)
- Itoyori → ~ +9% (+7K MT)
- Japanese Pollock → ~ -34% (-17K MT)

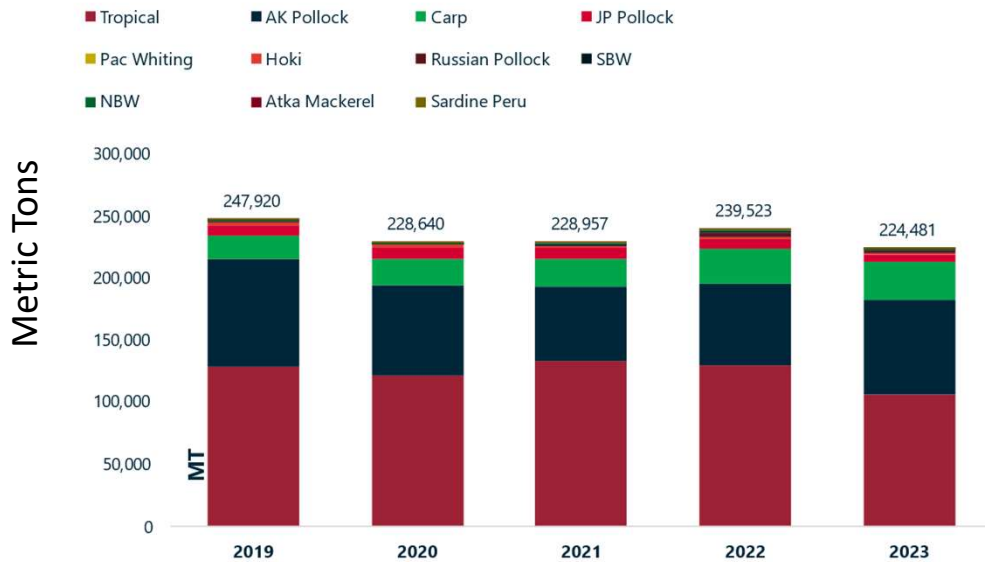
Source: UB Consulting, NMFS, Several Countries' Customs data





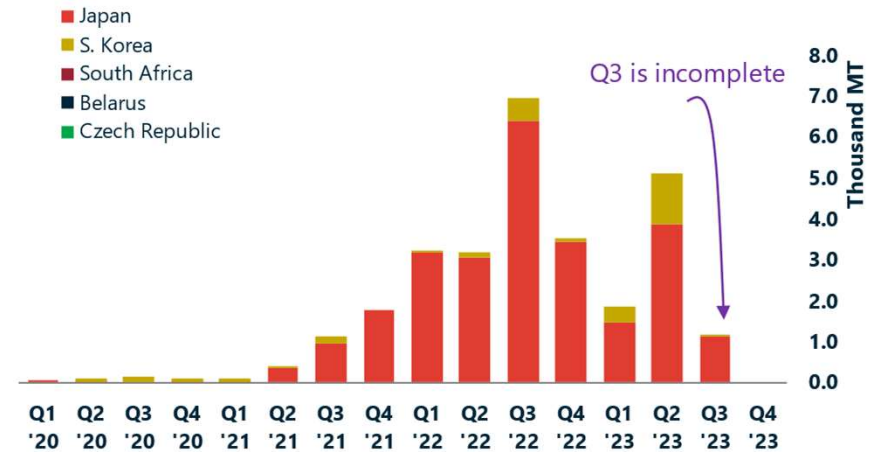
Thru Q1 2023, we saw an uptick in AKP, but a decrease everywhere else (Russian Pollock + Itoyori)

Global Surimi Production Estimates by Category



Source: UB Consulting, NMFS, Several Countries' Customs data

Surimi Imports by Declaring countries from Russia



As of Q1 '23:

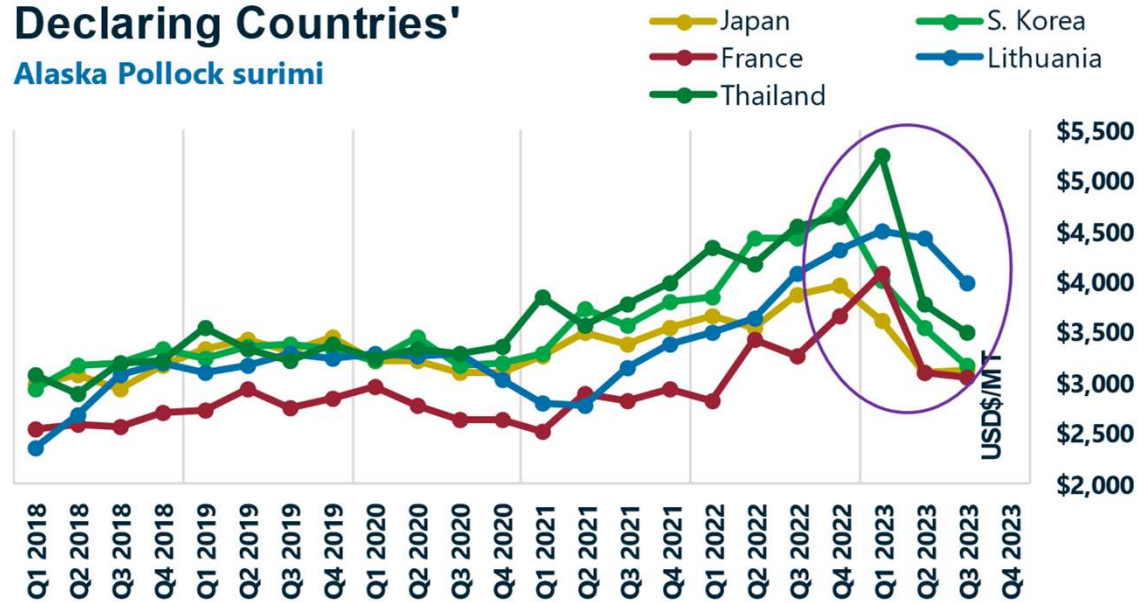
1. Alaskan Pollock → ~ +16%
2. Russian Pollock (Q2) → ~ +26%
3. Itoyori → ~ -24%
4. Japanese Pollock → ~ -35%





However, import prices do. In Q2, 2023, Surimi import prices have lost most, if not all, of their 2022 gains

Declaring Countries'
Alaska Pollock surimi



Source: GAPP Surimi Tracker Report





Thank you!



**15-Minute Break—Thank You,
Arctic Storm!**

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Supporting Sponsors: Alaska Fisheries Development Foundation, Angulas Aguinaga, Bank of America, Neptune Snacks, Perkins Coie, Restaurant Depot



Global Consumer Market Trends

Lorin Castiglione, Urner Barry;
Angel Rubio, Urner Barry

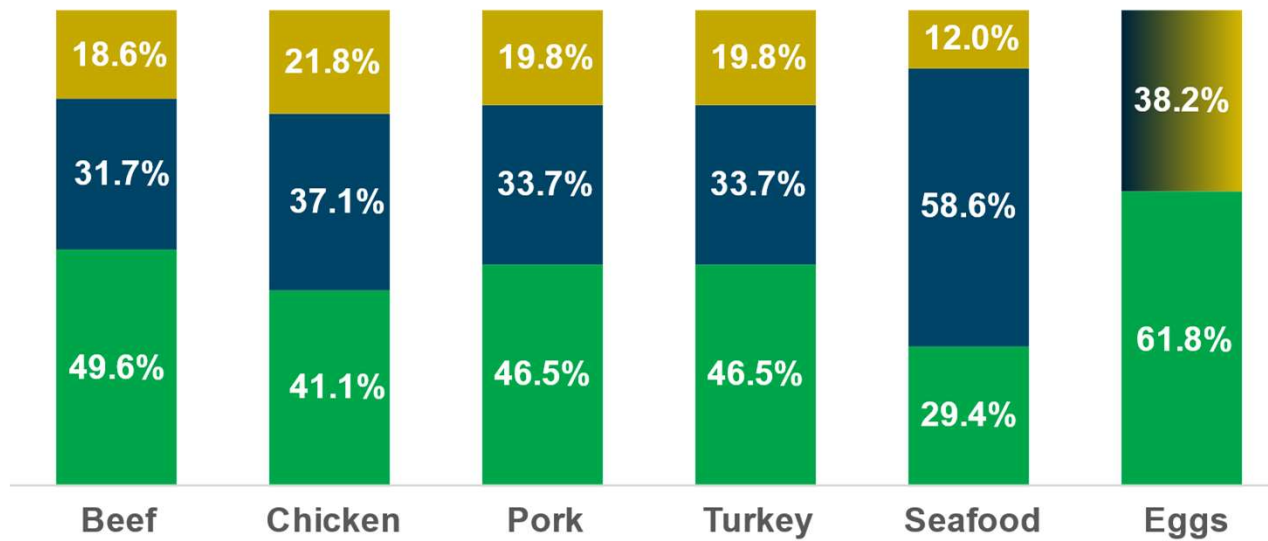
Context - Proteins

Prepared by Angel Rubio & Andrei Rjedkin

UB Estimates Foodservice vs. Retail split

Source: Urner Barry

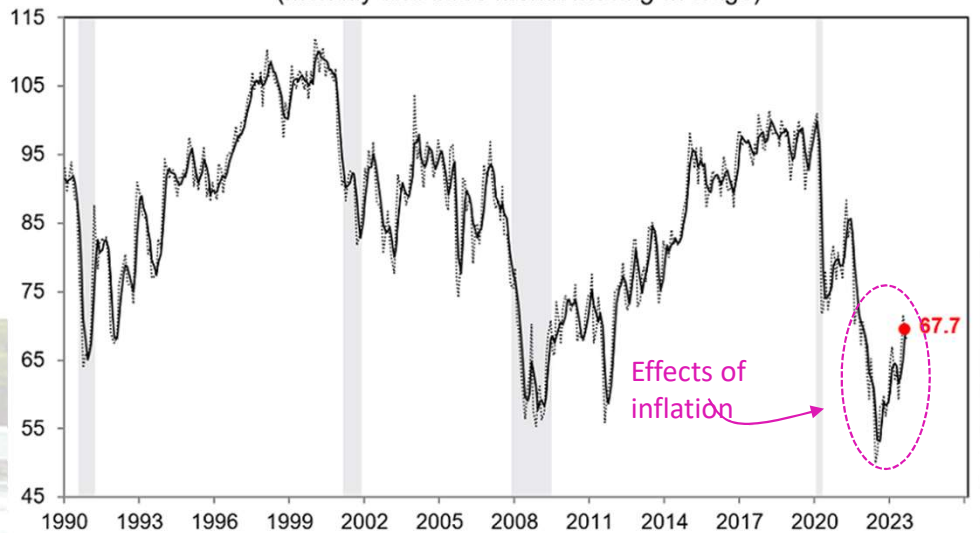
■ Retail ■ Restaurants and Drinking Places ■ Hotels/Institutions



Economic Backdrop (2 of 2)

Prepared by Angel Rubio & Andrei Rjedkin

Index of Consumer Sentiment (Monthly and three month moving average)



University of Michigan 2023

Consumer Confidence Index®



*Shaded areas represent periods of recession.
Sources: The Conference Board; NBER
© 2023 The Conference Board. All rights reserved.

Measurements of current consumer optimism

1. (U. Mich) - The Index of Consumer Sentiment focuses on personal finance conditions (Inflation??)
2. (Conf. Board) The Consumer Confidence Index focuses on the labor and business market conditions

Economic Backdrop (1 of 2)

Prepared by Angel Rubio & Andrei Rjedkin

Real Disposable Personal Income per Capita



Source: BEA, UB Consulting

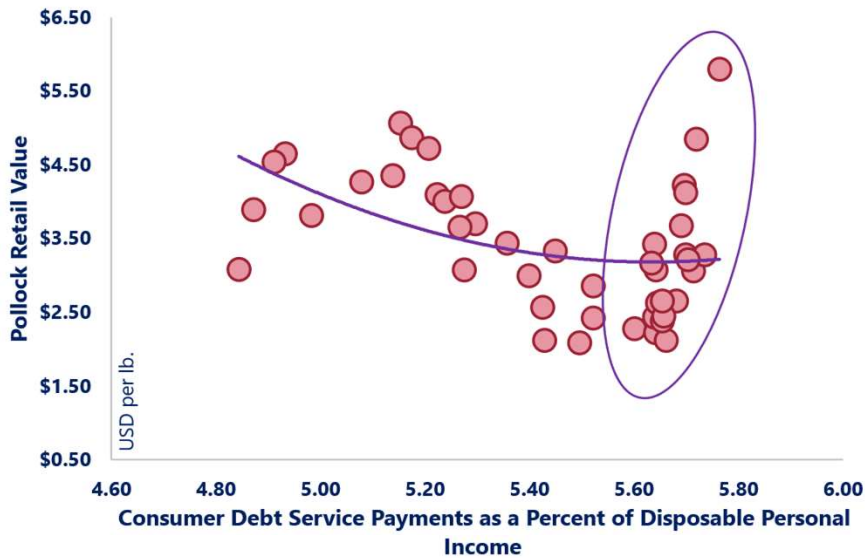
Pollock and Consumer Debt

Prepared by Angel Rubio & Andrei Rjedkin



Debt Service Payments vs. Pollock Prices

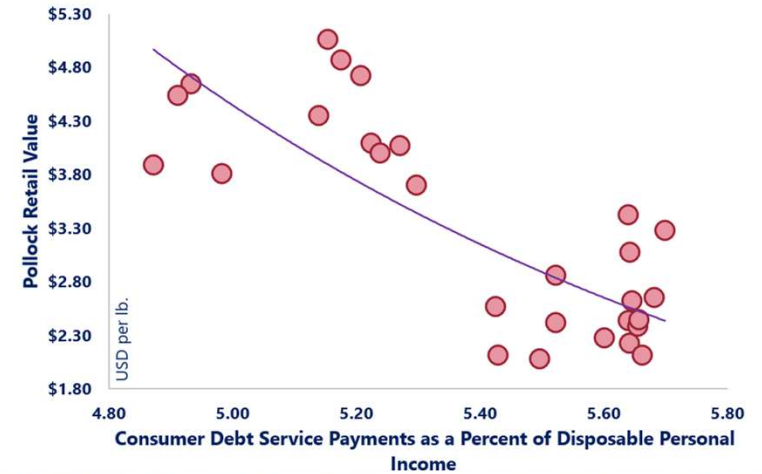
2012 -2023 YTD



- Prior to '19 → negative correlation (strong) price and consumer debt payments / income ratio
- As interest rates move up, and prices up, we experienced inelastic behavior → but is it? Are sales down?

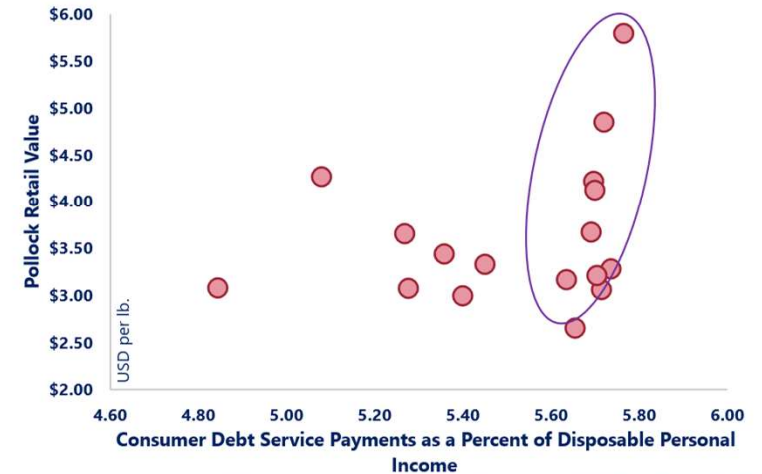
Debt Service Payments vs. Pollock Prices

2012 - 2018



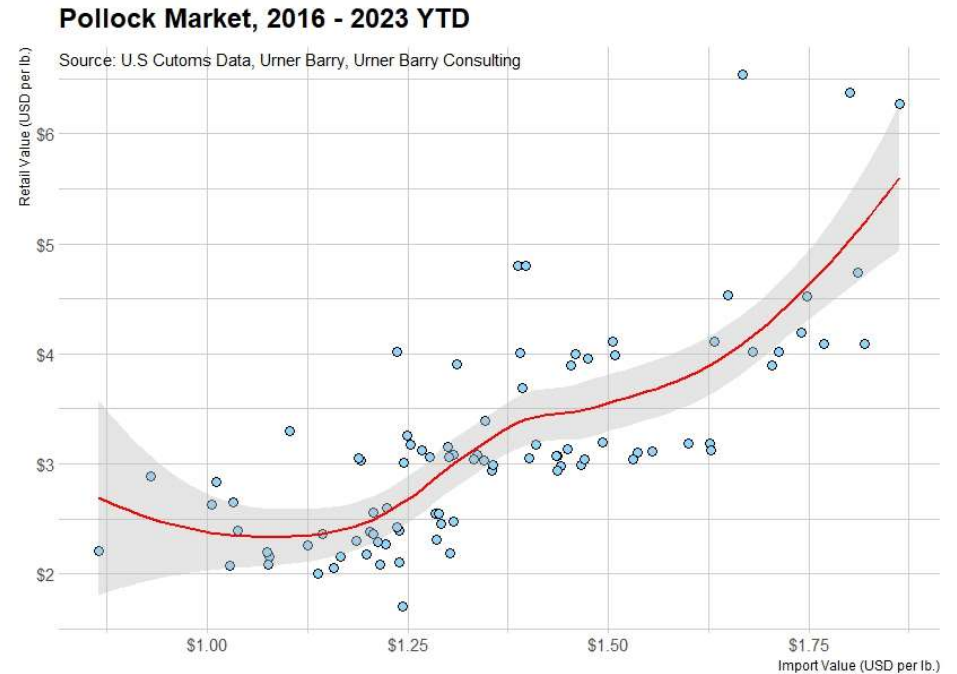
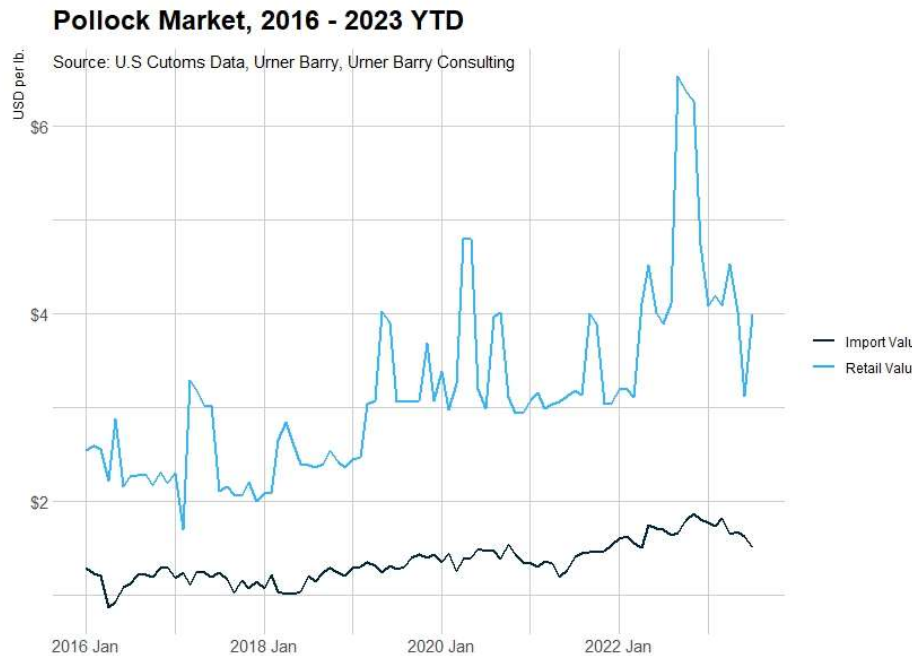
Debt Service Payments vs. Pollock Prices

2019 - 2023 YTD



Import Value vs. Retail Value 2016-2023 YTD

Prepared by Angel Rubio & Andrei Rjedkin

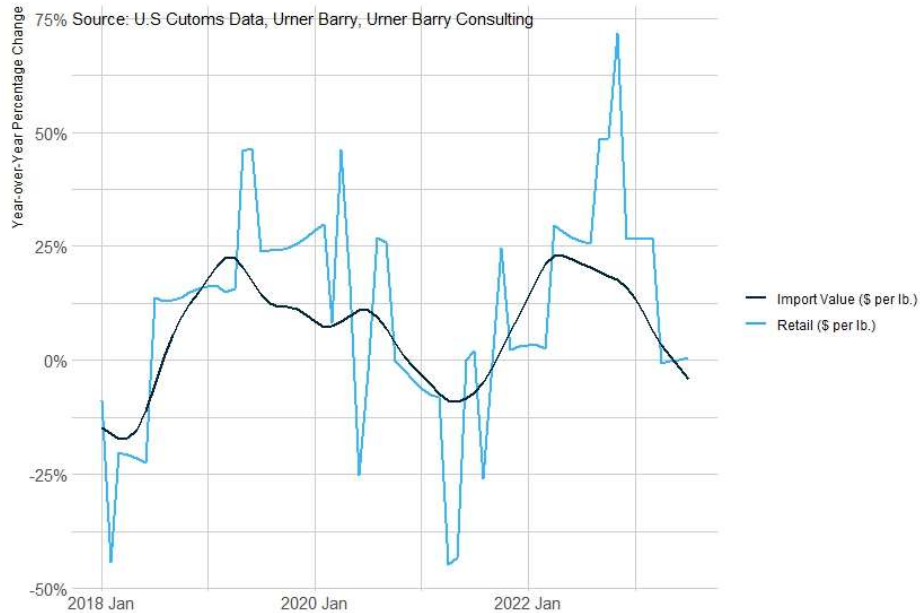


- Overall positive relationship b/w import price & retail value
- Retail value has been much more volatile than import values

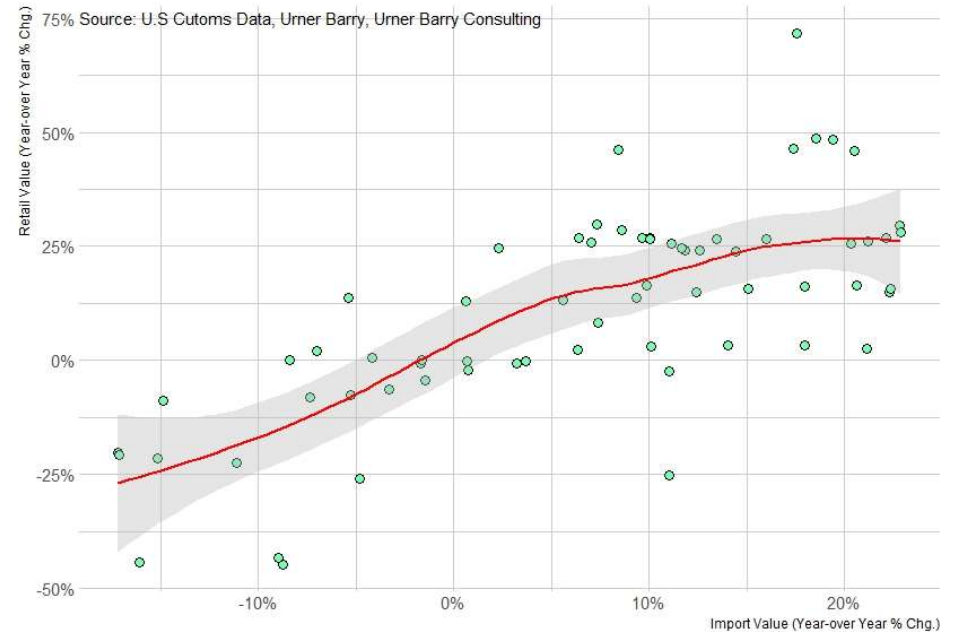
Import Value vs. Retail Value 2018-2023 YTD

Prepared by Angel Rubio & Andrei Rjedkin

Pollock Market Trend, 2018 - 2023 YTD



Pollock Market Trend, 2018 - 2023 YTD



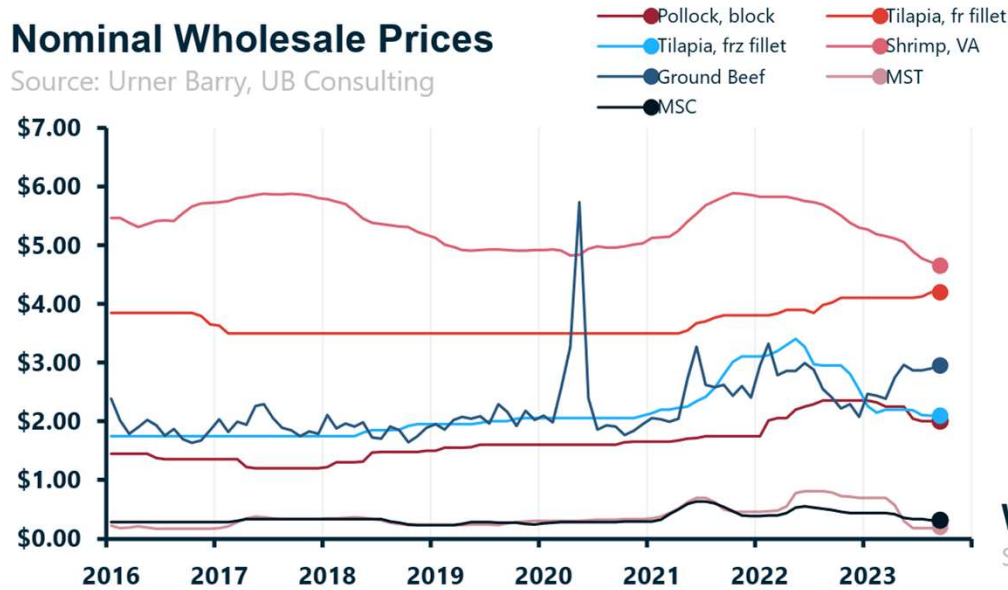
- Positive relationship b/w import and retail values
- On average, a 10% increase in import prices resulted in a ~14.6% increase in retail prices within the same month, holding all else equal.

Wholesale Price Comparison

Prepared by Angel Rubio & Andrei Rjedkin

Nominal Wholesale Prices

Source: Urner Barry, UB Consulting



Pollock vs Tilapia

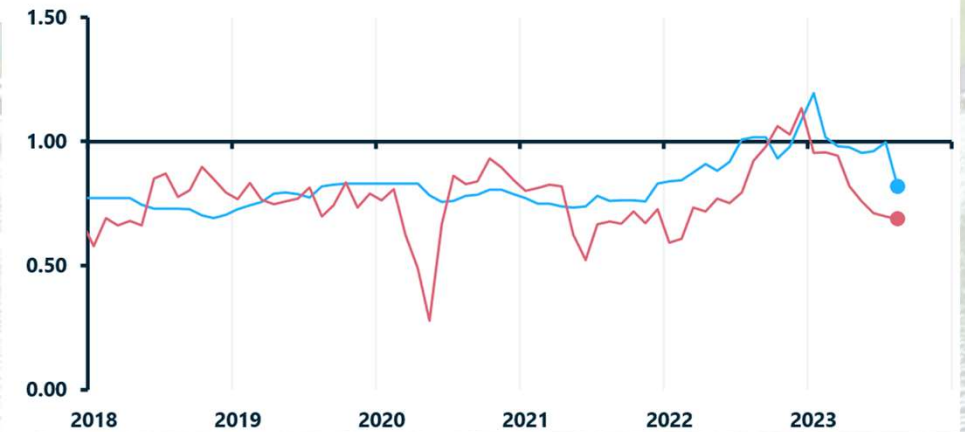
Source: Urner Barry, UB Consulting. Data is inflation adjusted.

Jan '10 = 100



Wholesale Real Price Ratios

Source: Urner Barry, UB Consulting



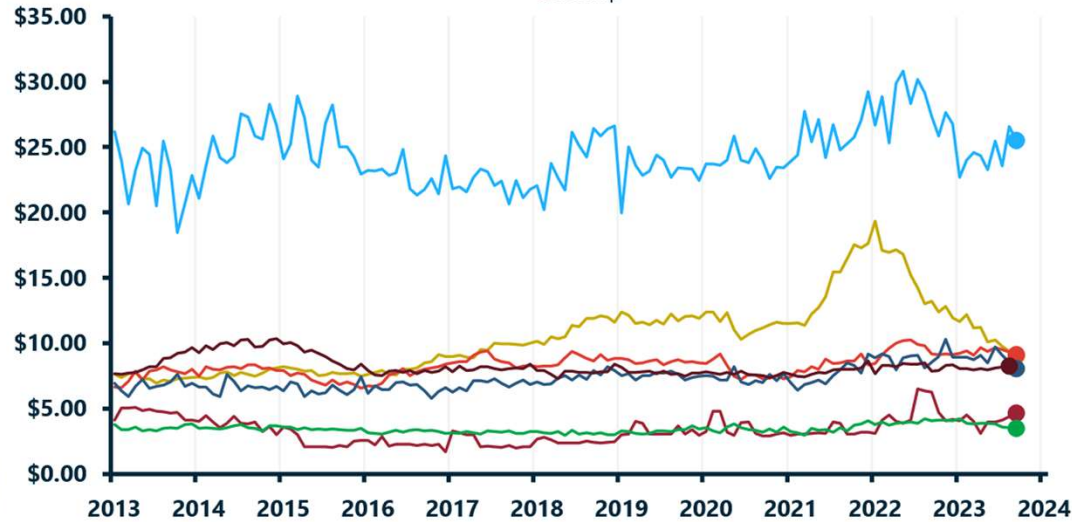
- Double frozen pollock fillet prices on an inflation-adjusted basis have adjusted to 2016 & 2017 levels.
- Price ratios vary b/w competing proteins and pollock prices.
 - Pollock fillets, DF to MST & MSC ratios adjusting lower from highs recorded earlier this year.

Retail Feature prices over time

Prepared by Angel Rubio & Andrei Rjedkin

Nominal Prices, Retail

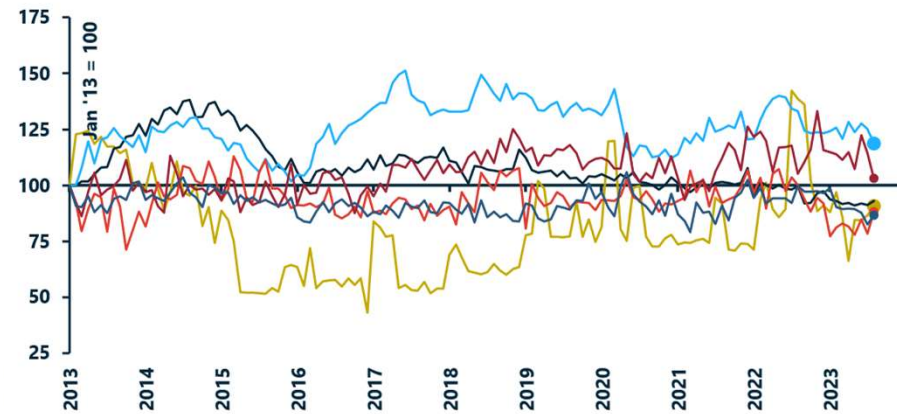
Source: Urner Barry, UB Consulting



- Retail figures for frozen pollock sit slightly below Jan '13 levels on an inflation adjusted basis.
- Price ratios vary b/w competing proteins and pollock prices.
 - Cod prices remain elevated, while tilapia prices hover below current pollock levels

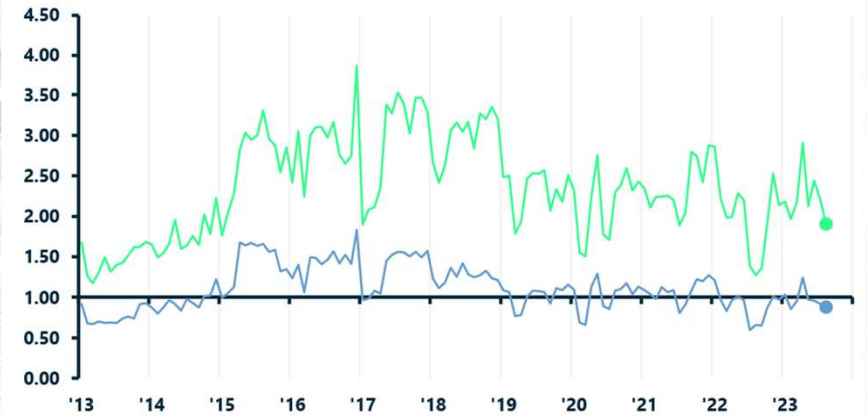
UB Retail Price Indexes

Source: Urner Barry, UB Consulting. Data is adjusted for inflation.



Retail Price Ratios

Source: Urner Barry, UB Consulting. Data is adjusted for inflation.



Retail Prices

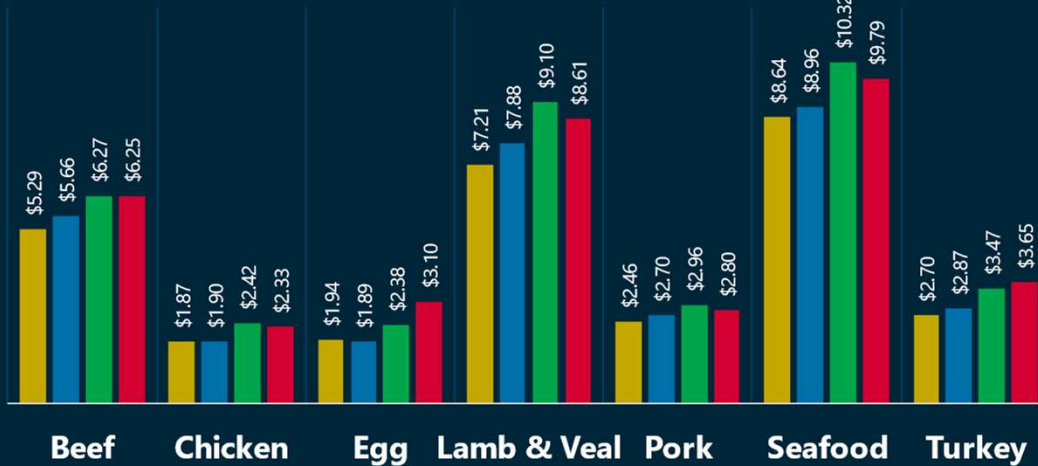
Prepared by Angel Rubio & Andrei Rjedkin

Pollock on the lower range vs all seafood

Avg. Retail Feature Price/lb.

Source: Urner Barry

2020 2021 2022 2023



Avg. Retail Price per Lb., 2023

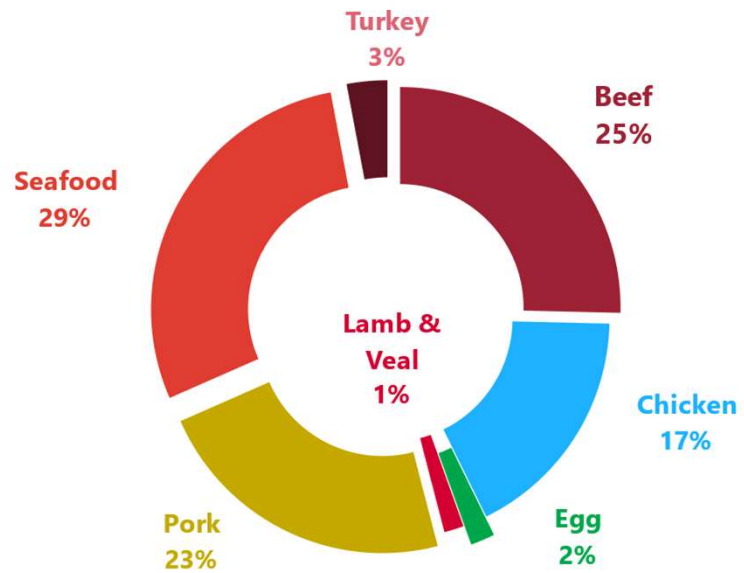
Source: Urner Barry



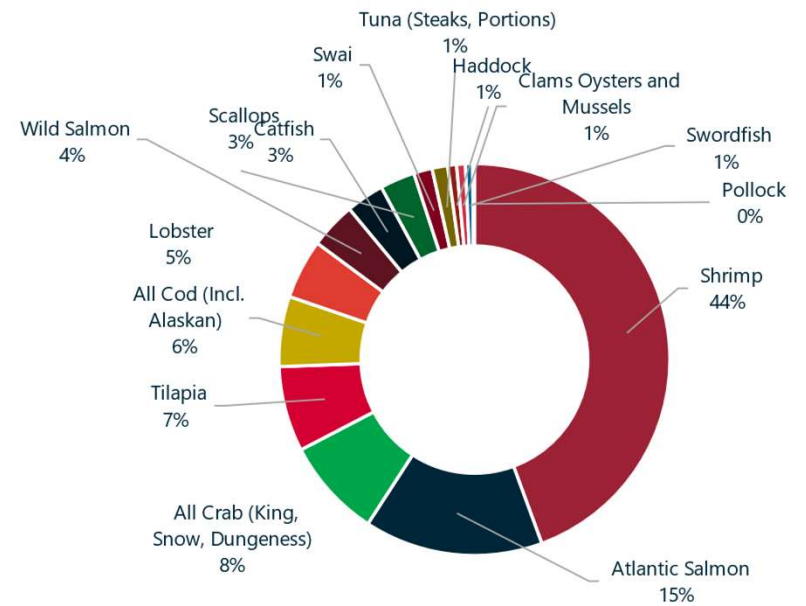
Promotions

Prepared by Angel Rubio & Andrei Rjedkin

Retail Promotions all proteins



Retail Promotions, SEAFOOD

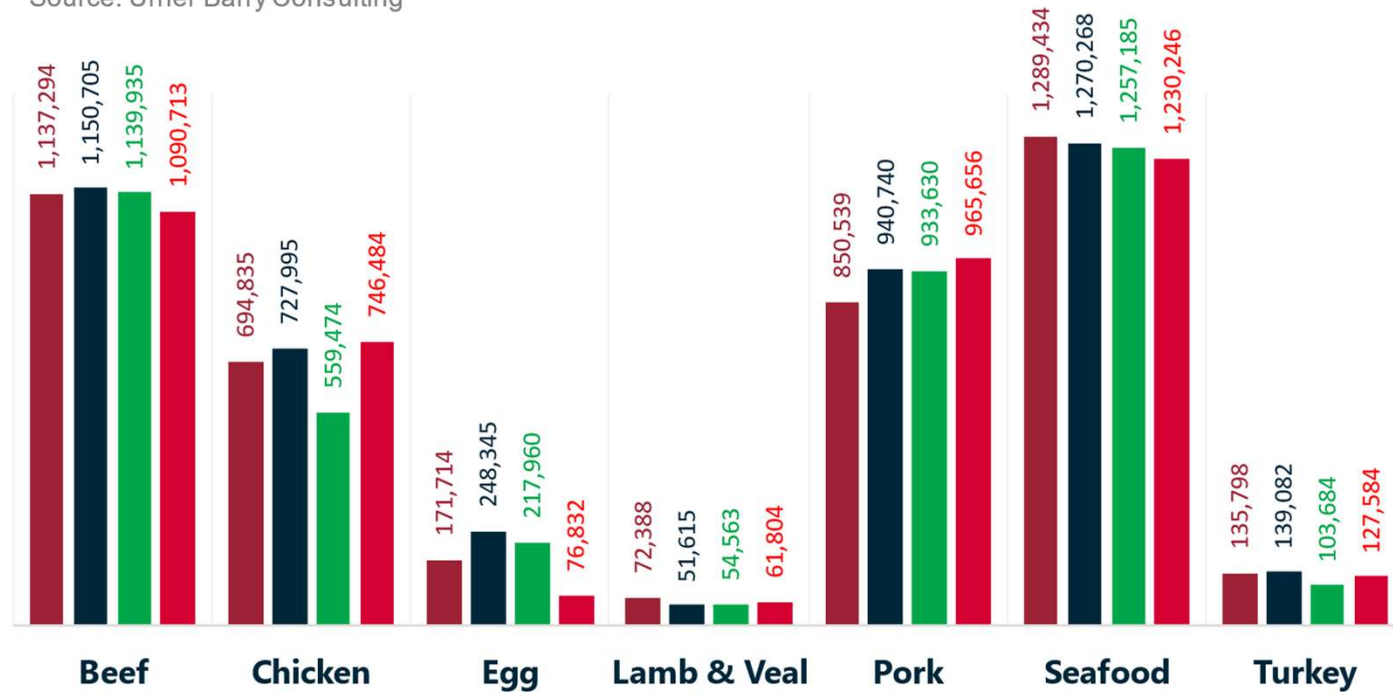


Promotions 2.0

Prepared by Angel Rubio & Andrei Rjedkin

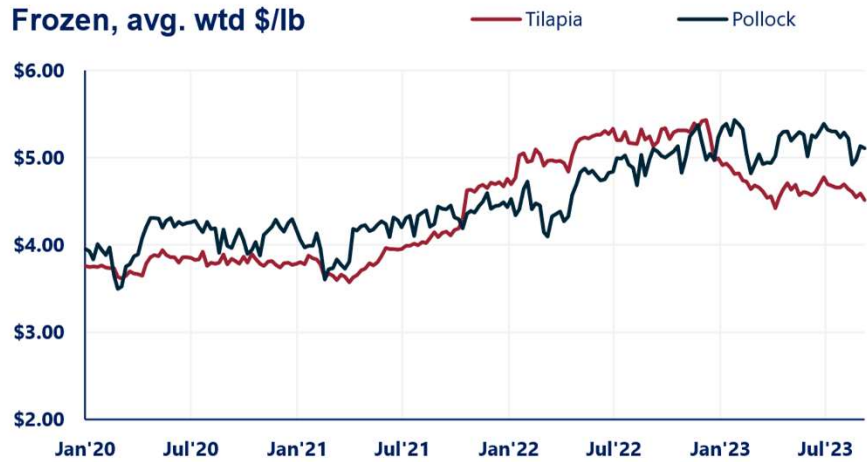
Sum of Retail Feature Activity - week 39

Source: Umer Barry Consulting



Retail Activity: Frozen Tilapia vs. Pollock

Prepared by Angel Rubio & Andrei Rjedkin



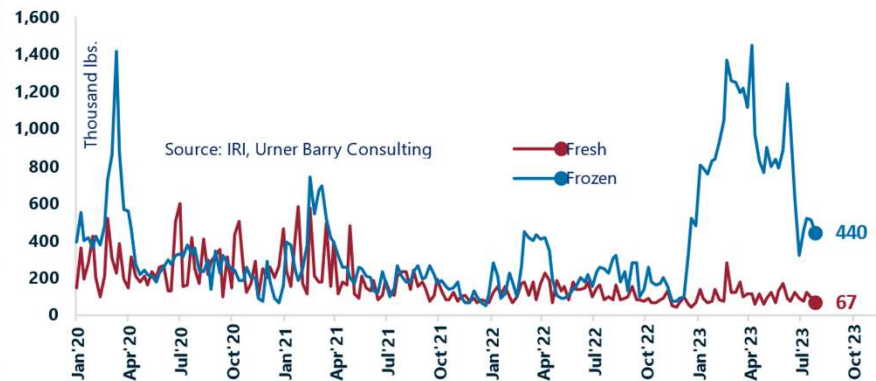
Source: IRI, Urner Barry Consulting

Retail Frozen Pollock to Tilapia Spread



Source: IRI, Urner Barry Consulting

*Est. lbs. disc



Prepared by Angel Rubio & Andrei Rjedkin

- Frozen pollock prices continue to trend upward starting in 2021.
- The seasonal increase of frozen volumes have decreased from highs recorded in 2020.
- The spread between pollock and tilapia retail prices inverted from late 2021 through 2022.
- The spread became positive once again in 2023.
 - On a YTD basis, the spread has averaged \$0.51 per pound

Retail Feature Activity and Margins - Pollock

Prepared by Angel Rubio & Andrei Rjedkin

Retail Feature Activity

Wholesale vs. Retail

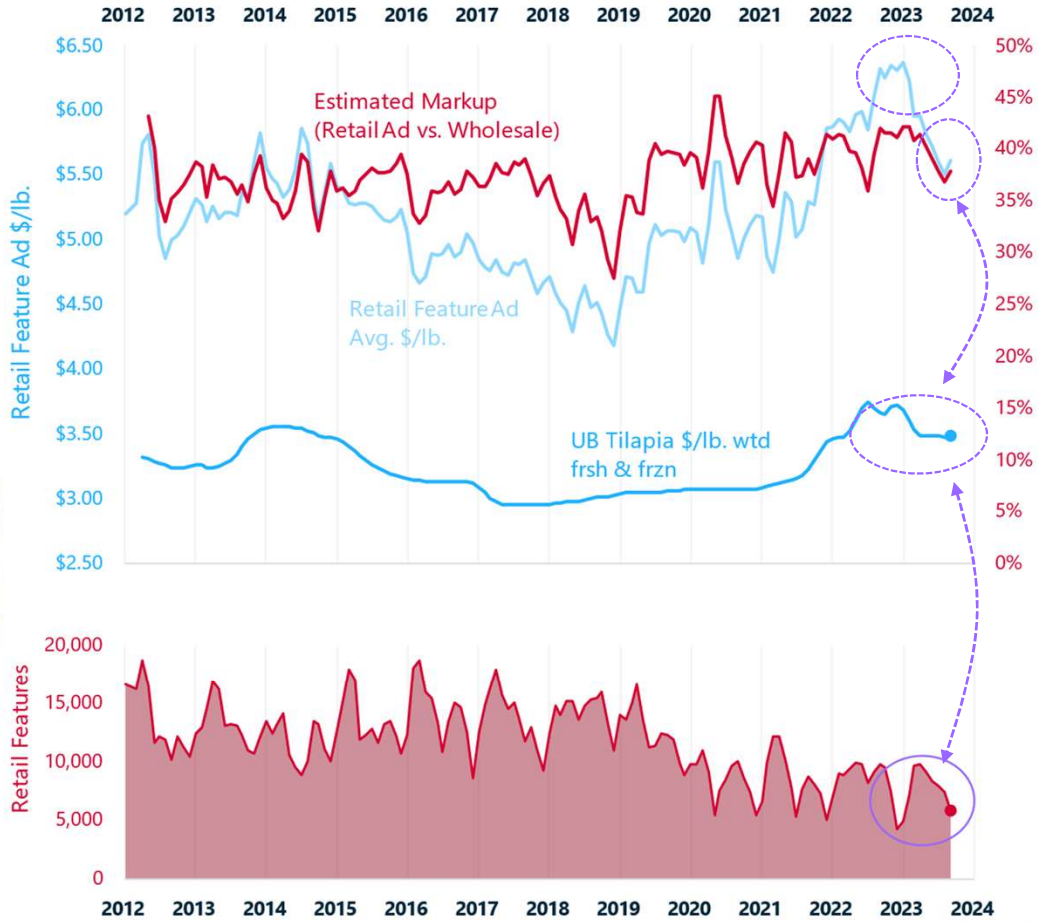
Source: UrneBarry, UB Consulting



Retail Feature Activity and Margins - Tilapia

Prepared by Angel Rubio & Andrei Rjedkin

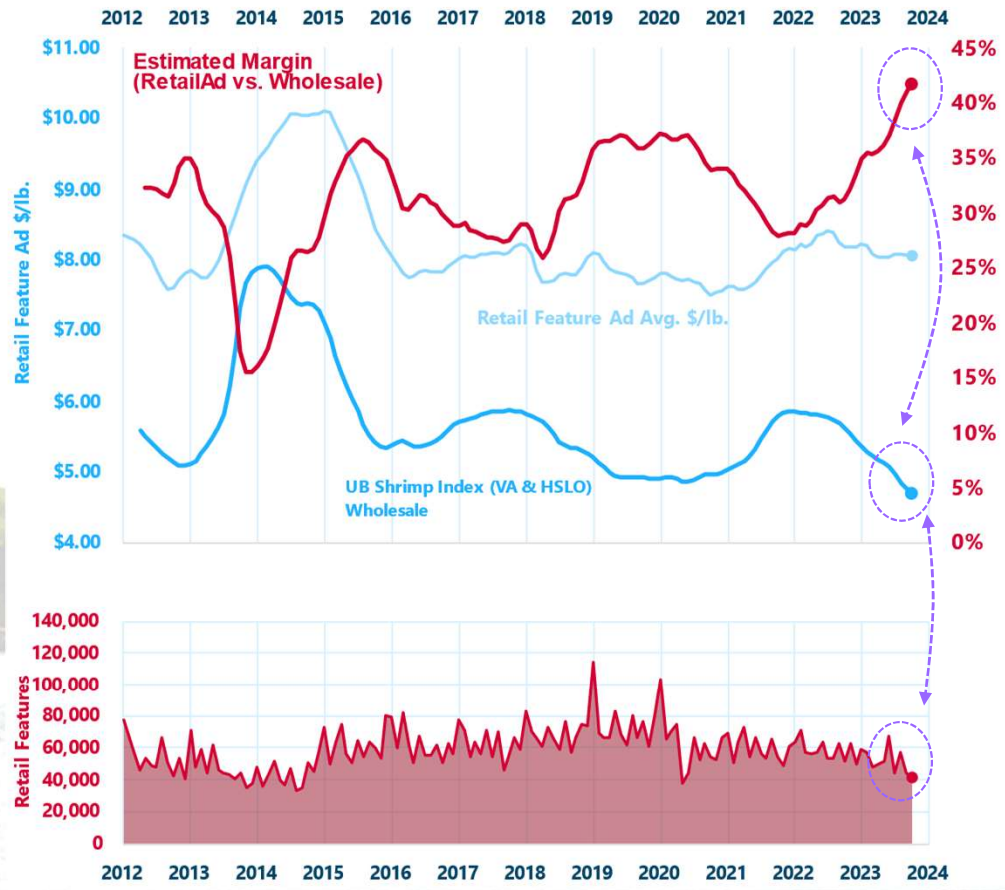
Tilapia Fresh and Frozen Fillets vs UB Tilapia UB Fr and Fz



Retail Feature Activity and Margins - Shrimp

Prepared by Angel Rubio & Andrei Rjedkin

Cooked, P&D raw, Shrimp vs UB VA Shrimp



Retail Feature Activity and Margins - Salmon

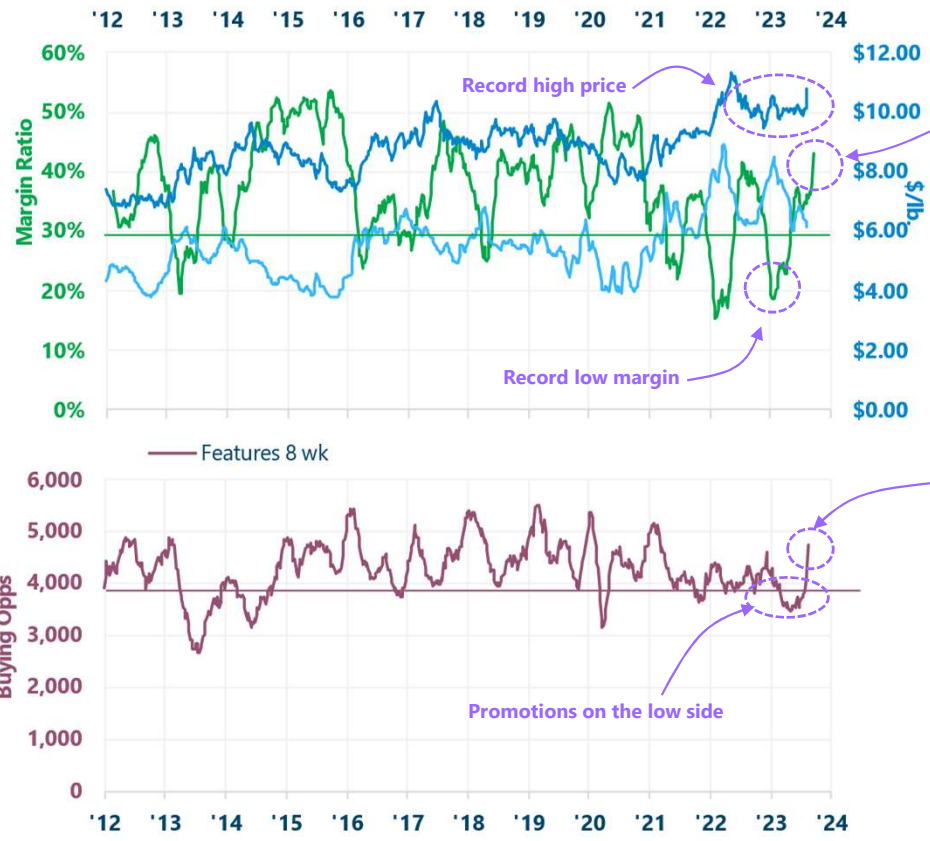
Prepared by Angel Rubio & Andrei Rjedkin

Retail Feature Activity

Wholesale vs. Retail

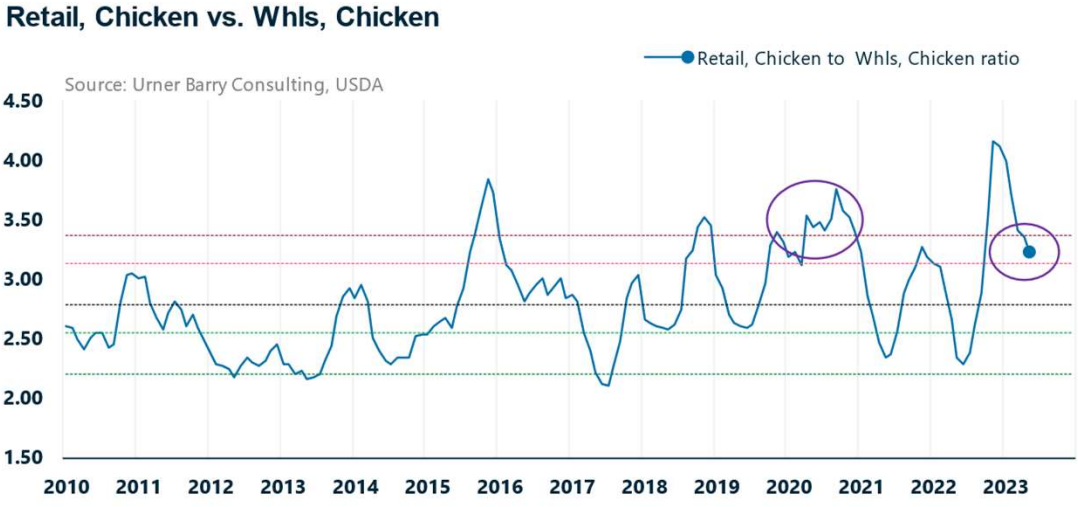
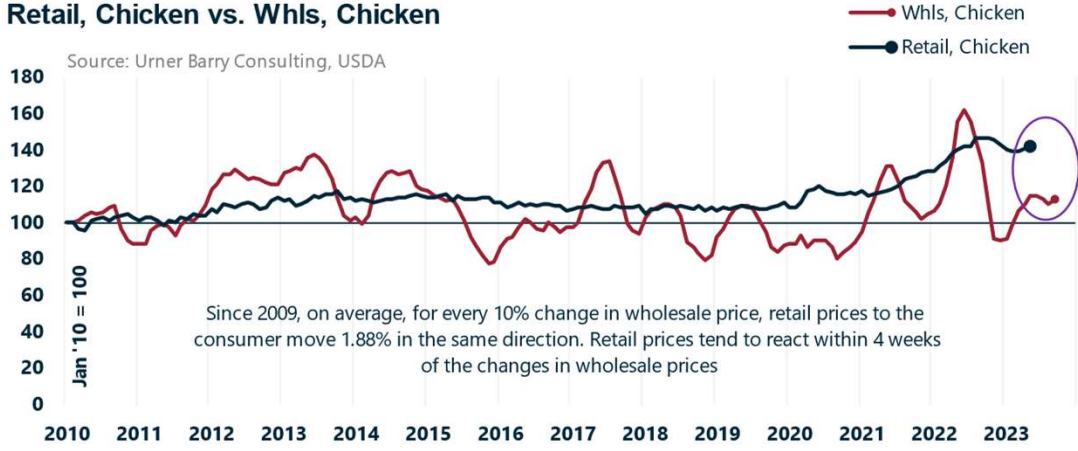
Source: Urner Barry, UB Consulting

- Ret Ftr to UB Index ratio
- Ret. Ftr. \$/lb.
- UB Salmon Index



Retail Feature Activity and Margins - Chicken

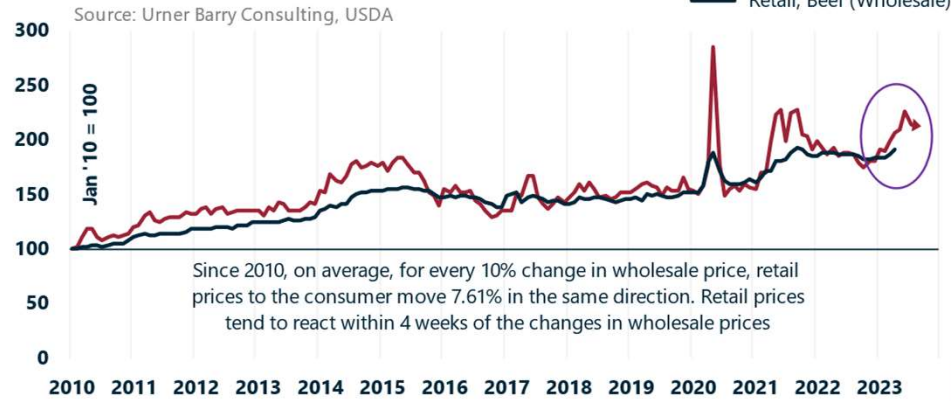
Prepared by Angel Rubio & Andrei Rjedkin



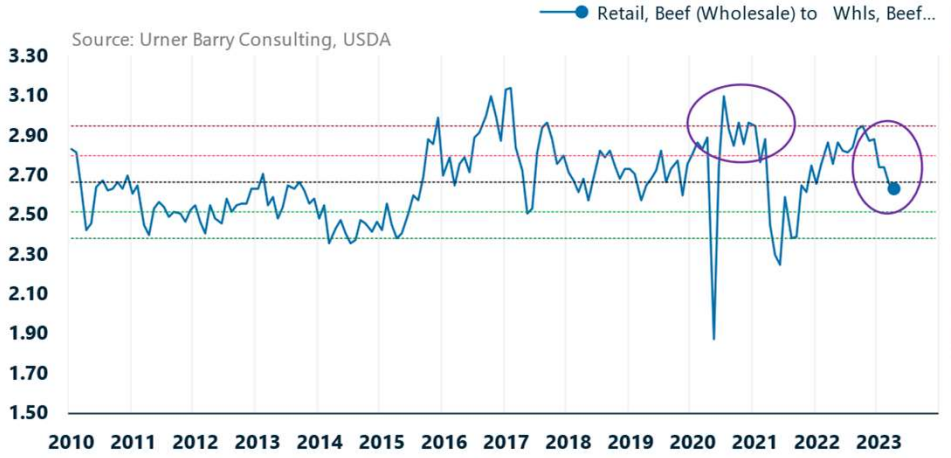
Retail Feature Activity and Margins - Beef

Prepared by Angel Rubio & Andrei Rjedkin

Retail, Beef (Wholesale) vs. Whls, Beef (Wholesale) — Whls, Beef (Wholesale)
— Retail, Beef (Wholesale)



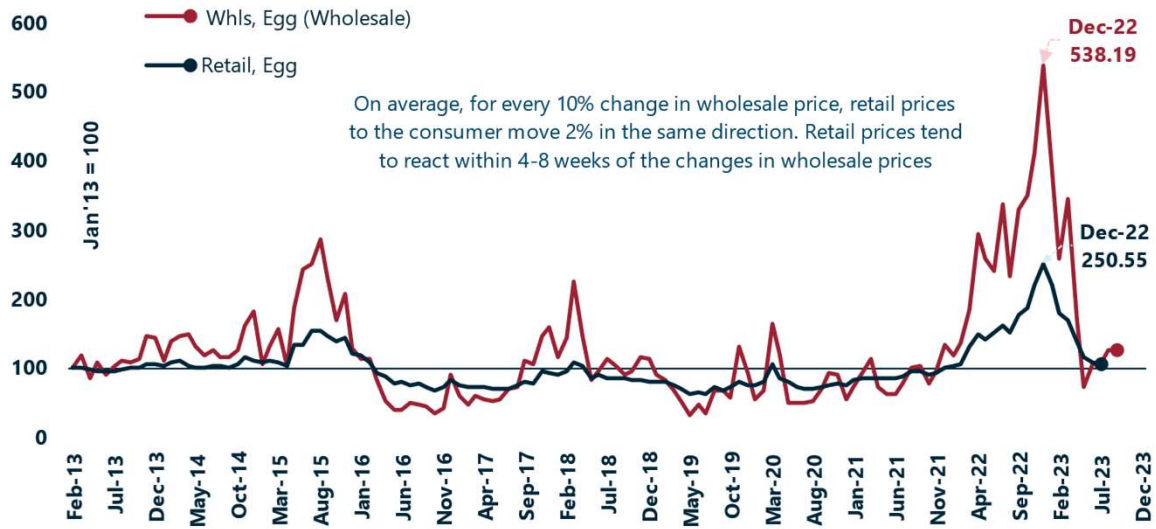
Retail, Beef (Wholesale) vs. Whls, Beef (Wholesale)



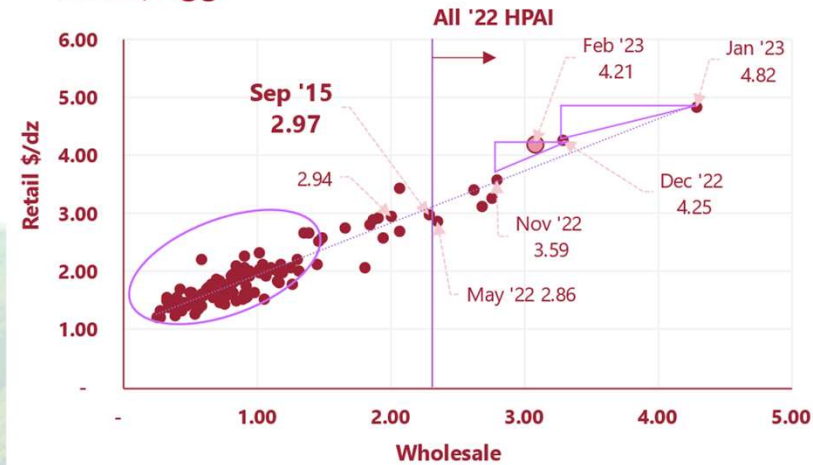
Retail Feature Activity and Margins - Eggs

Prepared by Angel Rubio & Andrei Rjedkin

Retail, Egg vs. Whls, Egg (Wholesale) (+ UB Retail Est.)

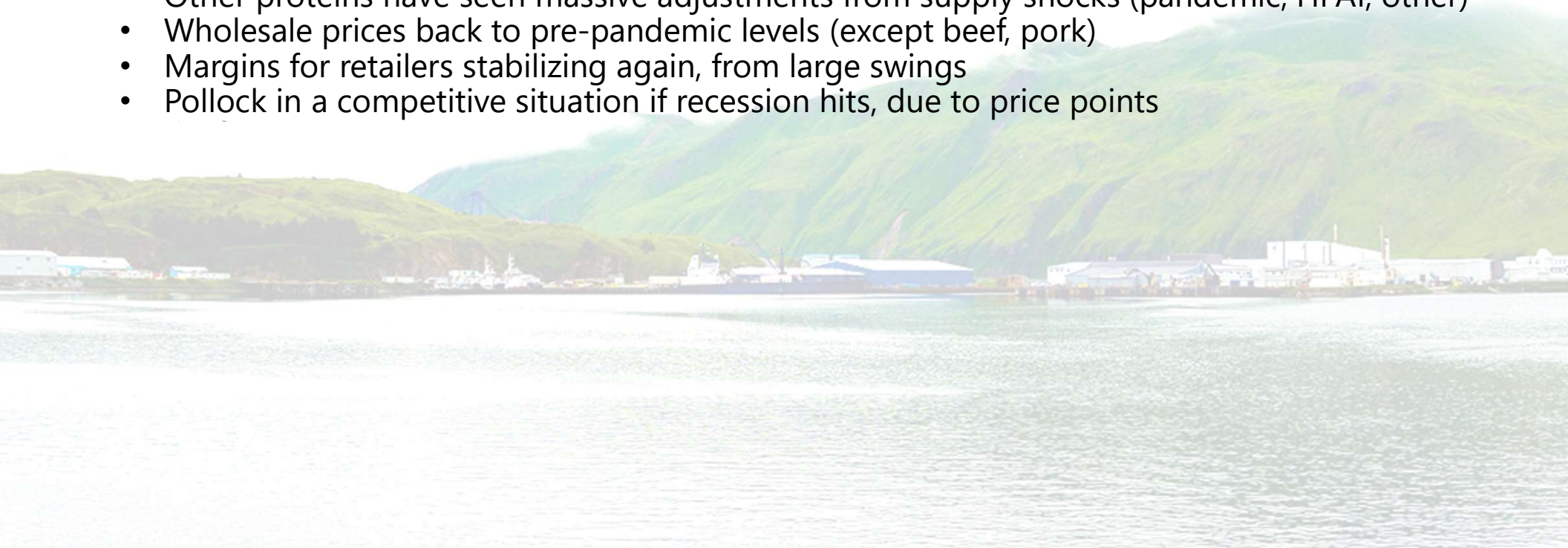


Retail, Egg



Conclusion

- Inflation is a factor, but we don't know how much that is really impacting Pollock demand
- Data suggests that prices to consumer could decline, and stabilize demand, if it was weak
- Other proteins have seen massive adjustments from supply shocks (pandemic, HPAI, other)
- Wholesale prices back to pre-pandemic levels (except beef, pork)
- Margins for retailers stabilizing again, from large swings
- Pollock in a competitive situation if recession hits, due to price points





Thank you!

Lorin Castiglione, Urner Barry;
Angel Rubio, Urner Barry



Snapshot of Our Consumer

Mary Elizabeth Germaine, Ketchum Analytics;
Lauren Hasse, Ketchum Analytics

OBJECTIVES

- **Understand the general population and Fish Eaters' key habits and behaviors with fish**
- **Identify shifts in attitudes and perceptions of Wild Alaska Pollock and other fish**
- **Uncover drivers of demand for Wild Alaska Pollock**
- **Explore the importance of fish sustainability**
- **Understand how to effectively engage consumers from a communications and marketing perspective**



METHODOLOGY

Data represented throughout this report comes from two studies:

GAPP Annual Tracking Study

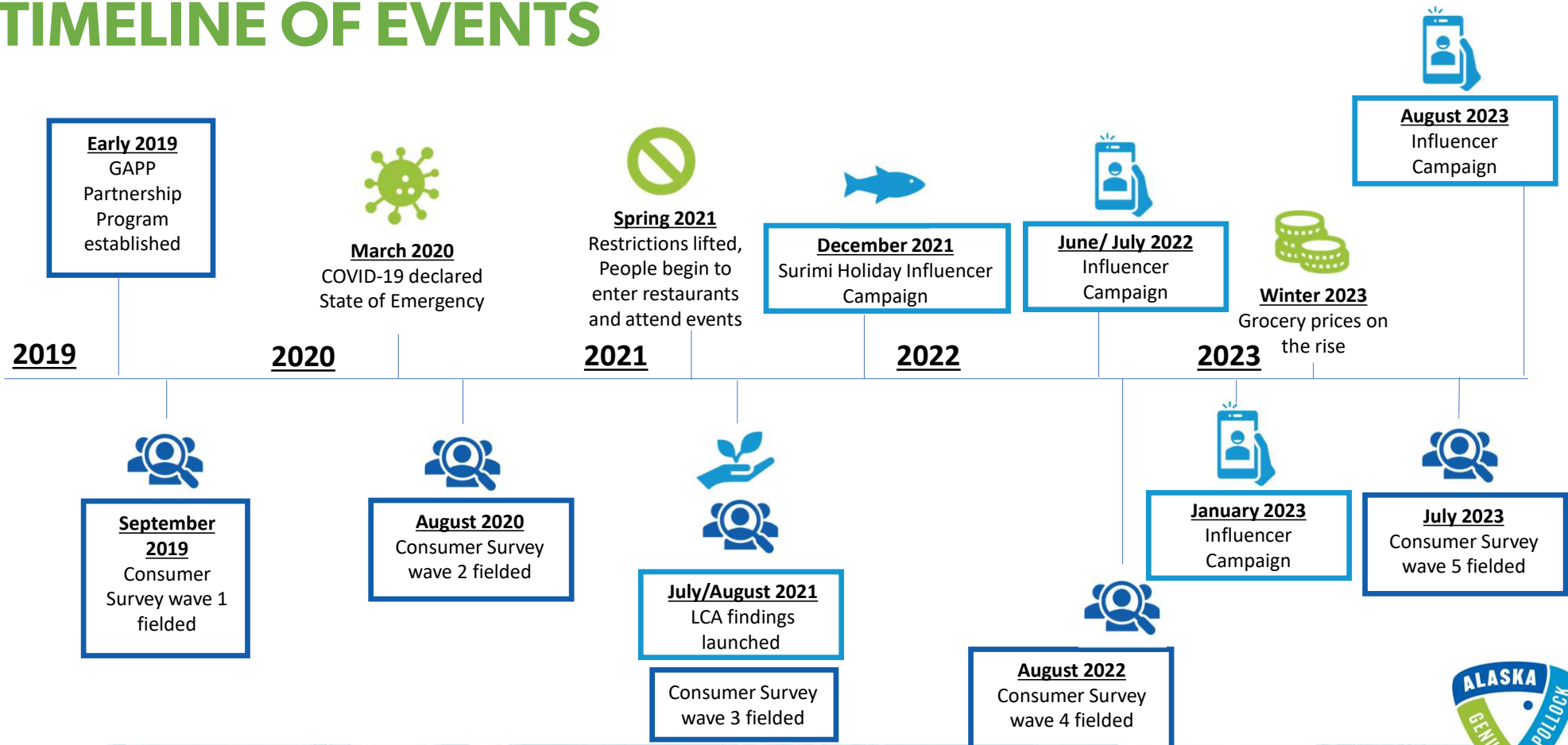
- An online survey was fielded in the United States among a nationally-representative sample of adults aged 18 years or older between July 11th – 24th, 2023. This report reflects findings from the general population (n=1,032), a statistically significant sample to allow for segmentation among gender, 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 comparisons were included in this analysis:
 - Salmon
 - Pacific Hake / Whiting
 - Cod
 - Halibut
 - Tilapia
 - Tuna
 - Haddock
 - Catfish
 - Sole / Flounder
 - Rock fish

Ketchum 2023 Food Consumer Study

- Ketchum Analytics conducted a 15-minute survey among 2,000 nationally representative U.S. children and adults, ages 13+. The survey was in field from 4/7 – 4/18 with margins of error at 95% confidence level.
- Generations defined as:
 - Gen Z: Ages 13-26
 - Millennial: Ages 27-42
 - Gen X: Ages 43-58
 - Boomers: Ages 59-77



TIMELINE OF EVENTS



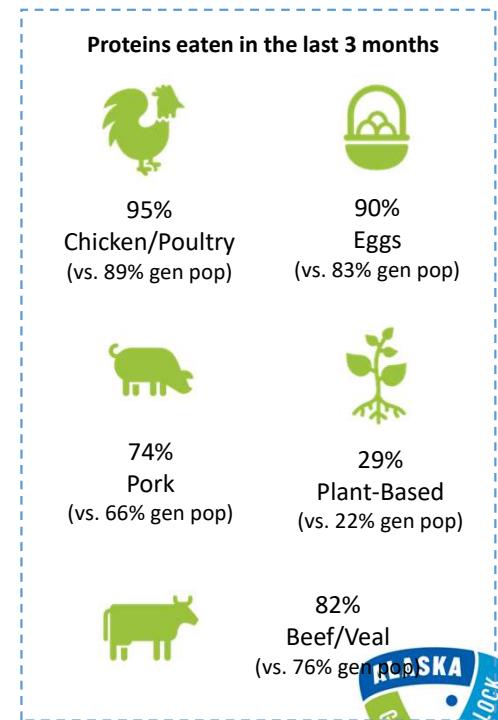
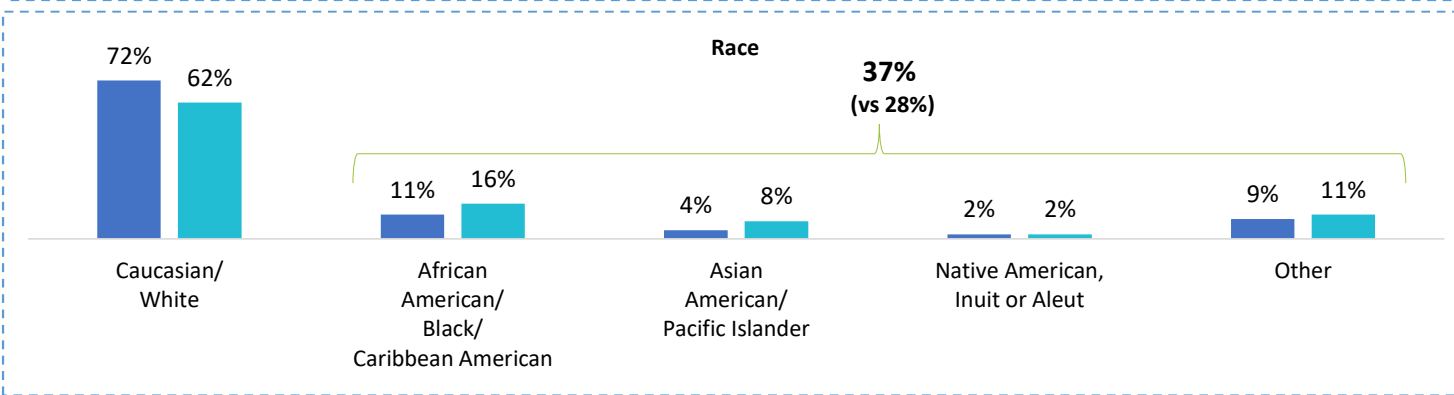
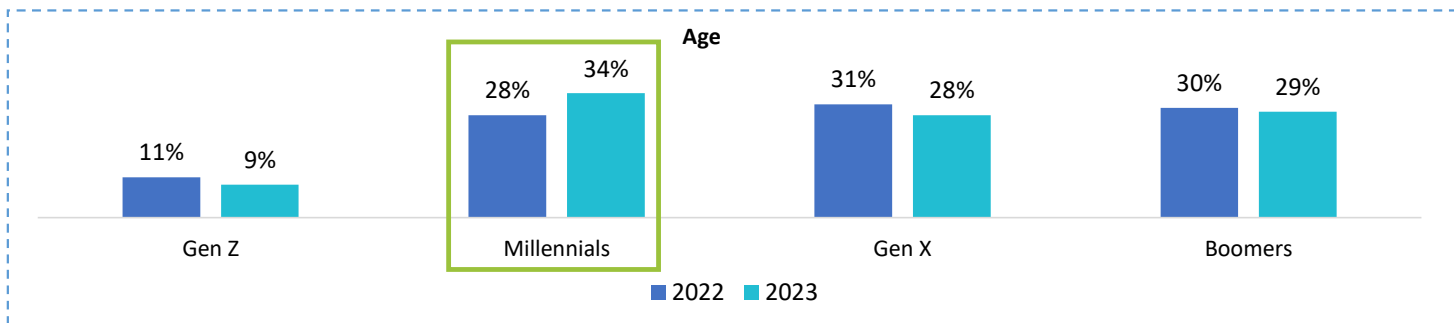
Changing Consumer Landscape





Millennial and multicultural consumers are a growing fish-eating audience.

Fish-Eater Consumer Profile



D4. With which race do you most identify? Fish Eaters (n=598)
 N33. How much of the grocery shopping in your household do you do? Fish Eaters (n=598)
 N34. How much of the cooking in your household do you do? Fish Eaters (n=598)
 N1. Please indicate the types of foods you have eaten in the past 3 months, including at home or at a restaurant. Fish Eaters (n=598)
 D5. State of Residence Fish Eaters (n=598)





Let's Explore the **Millennial** **Fish Eater**



Millennial fish eaters offer opportunities to introduce Wild Alaska Pollock to families and within multicultural cuisines.

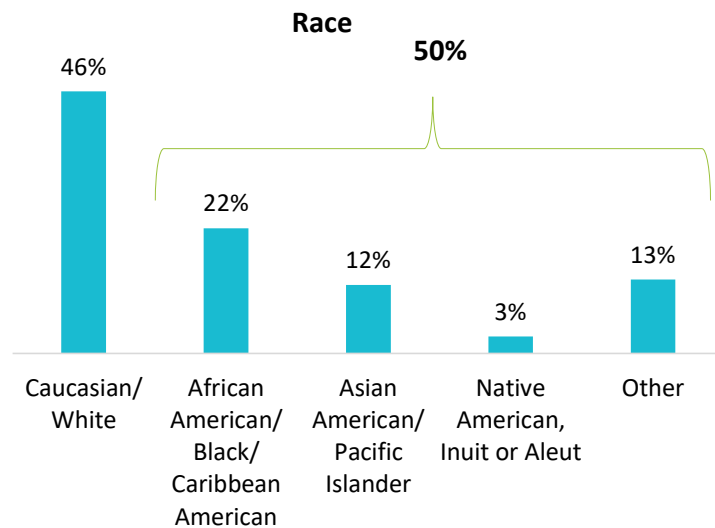
5.3M new millennials entered the fish-eating audience since last year, with half (2.6M) becoming familiar with Wild Alaska Pollock.



59%
Female



41%
Male



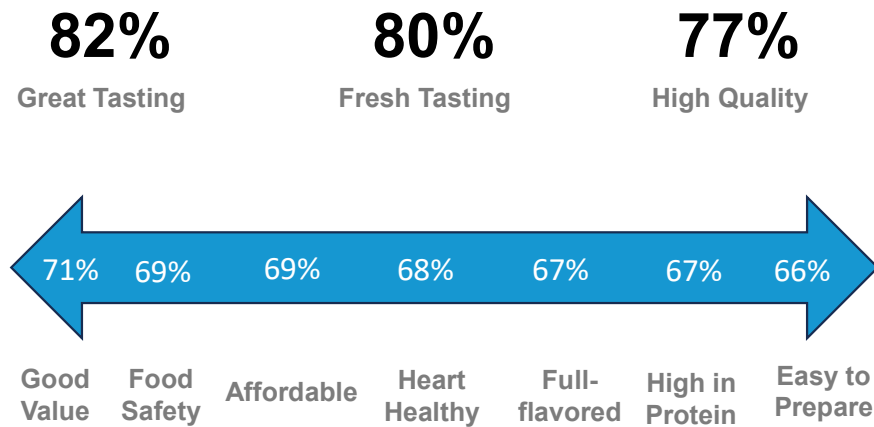
60%
Are a parent or guardian of a child under 18

D2. What is your gender? Millennial Fish Eaters (n=201)
D4. With which race do you most identify? Millennial Fish Eaters (n=201)
C1. Are you the parent or guardian of any children under the age of 18? Millennial Fish Eaters (n=201)



Prioritize flavor, quality and value when talking to **millennial fish eaters, utilizing fishers, research studies, dieticians and recipe websites to share messaging.**

Important Fish Attributes
(T3B on 10-pt scale)



Trusted Sources for Information about Fish



41%
Friends/Family



39%
Fishers



30%
Research studies,
Dieticians, Recipe
Websites



28%
Food Blogs

Q8_1. Below is a list of attributes that people may use to describe fish. For each, please rate how important that attribute is to you when purchasing and/or ordering fish. Millennial Fish Eaters (n=201)
N30. Which of the following sources do you trust when it comes to news and information about fish? Millennial Fish Eaters (n=201)



When looking for recipe inspiration, millennial fish eaters prioritize new flavors and affordable ingredients, turning to YouTube.

Source of Recipe Inspiration



45%
YouTube



43%
Friends/Family



30%
Food Network

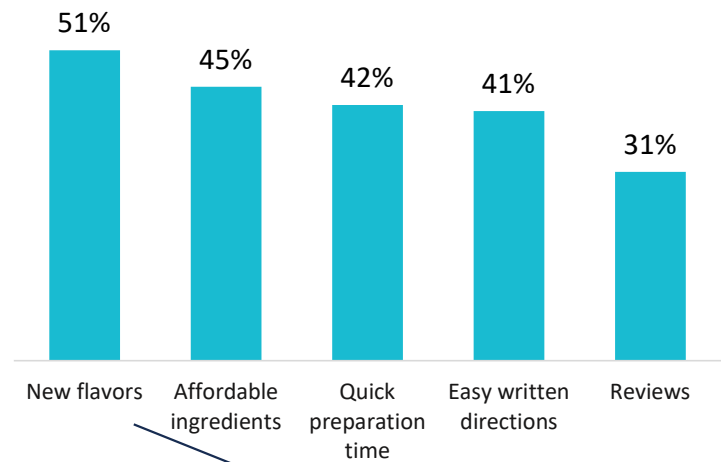


28%
Facebook



27%
Instagram, TikTok,
Pinterest, Google

Recipe Inspiration



Affordable ingredients & new flavors are more important to Millennial Fish Eaters YoY.

N28. Where do you find most of your recipes? Millennial Fish Eaters (n=201)
N29. What inspires you to try a particular recipe? Millennial Fish Eaters (n=201)





Let's Explore the Multicultural Fish Eater



Multicultural fish eaters are Millennials too -- content should be relevant to their lifestage — young adults who may be starting new families.

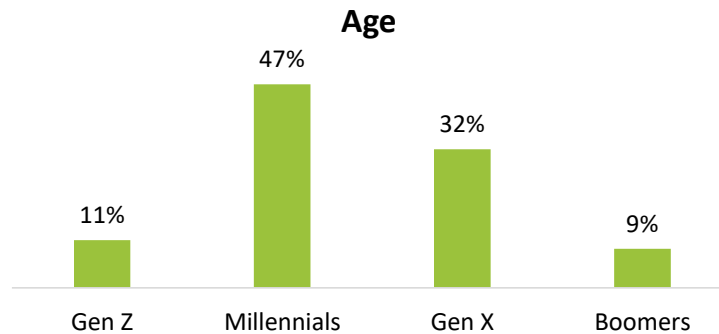
13.1M new multicultural consumers have entered the fish-eating audience since last year, with two-thirds (9.1M) becoming familiar with Wild Alaska Pollock.



67%
Female



33%
Male



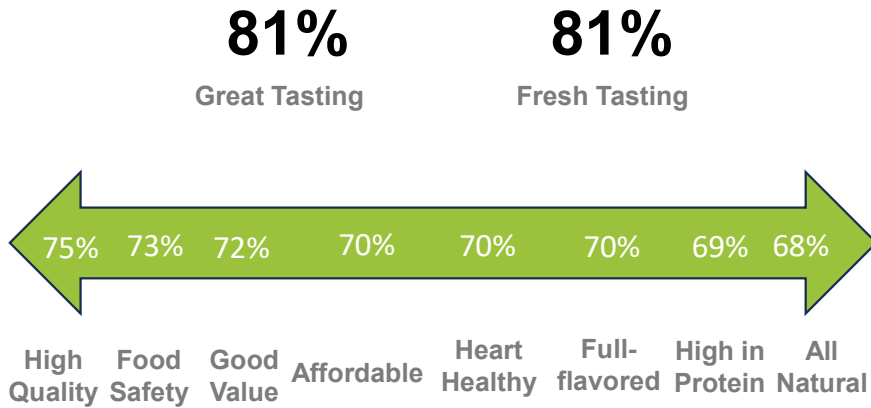
40%
Are a parent or guardian of a child under 18

D2. What is your gender? Multicultural Fish Eaters (n=220)
D1. What is your current age? Multicultural Fish Eaters (n=220)
C1. Are you the parent or guardian of any children under the age of 18? Multicultural Fish Eaters (n=220)

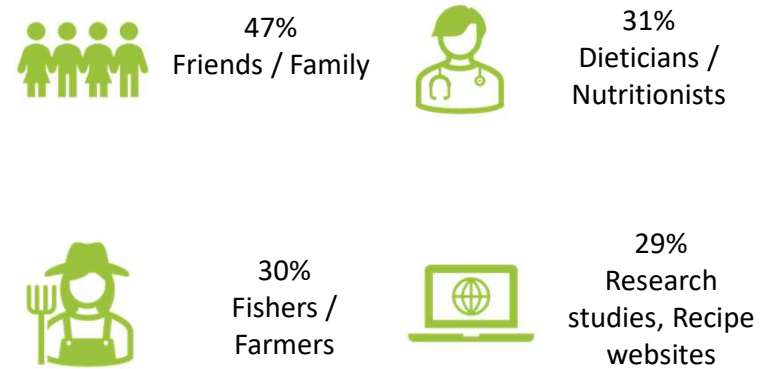


Taste is key when talking to multicultural fish eaters – consider word of mouth campaigns where friend and family become messengers.

Important Fish Attributes (T3B on 10-pt scale)



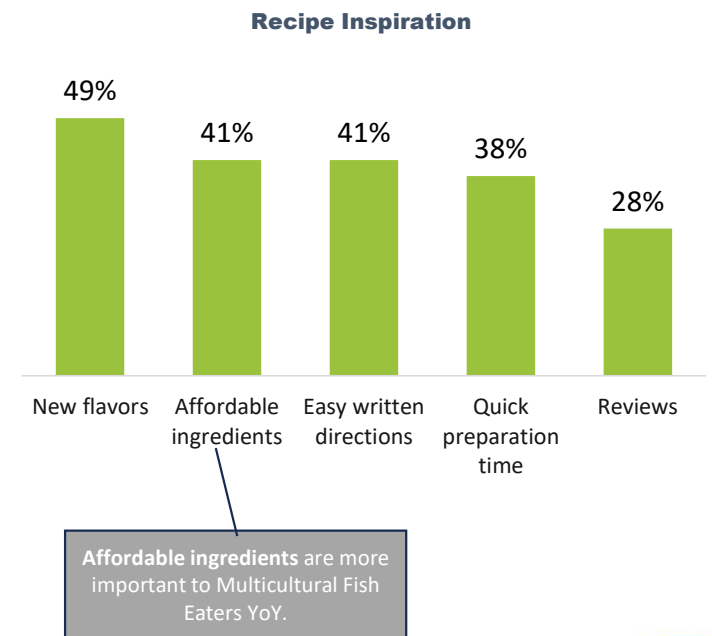
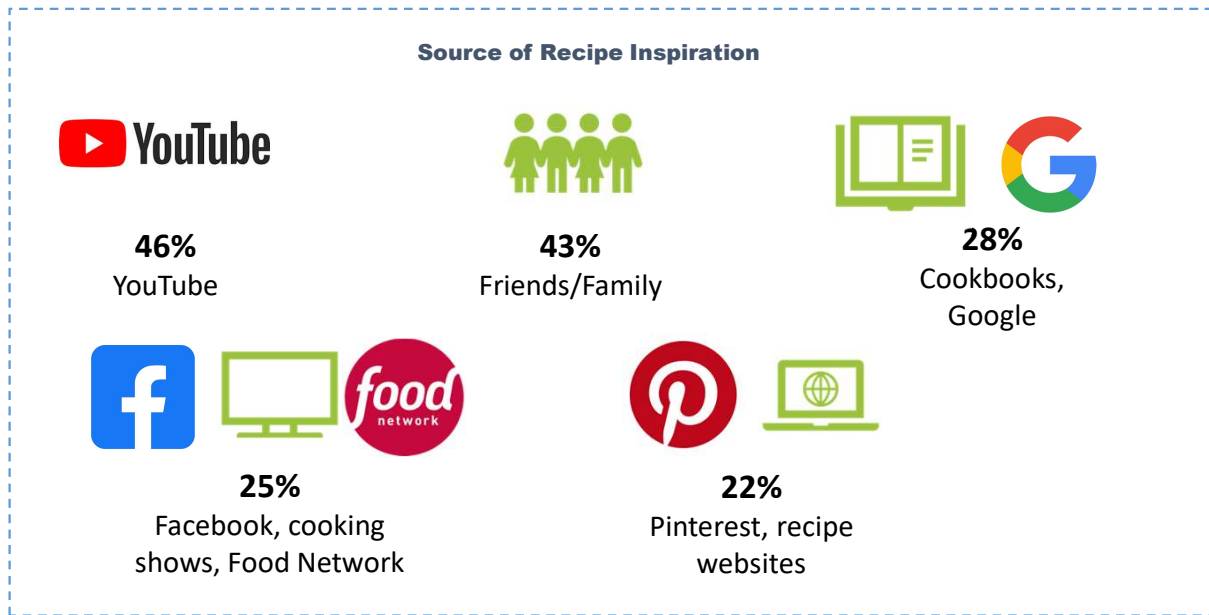
Trusted Sources for Information about Fish



Q8_1. Below is a list of attributes that people may use to describe fish. For each, please rate how important that attribute is to you when purchasing and/or ordering fish. Multicultural Fish Eater (n=220)
 N30. Which of the following sources do you trust when it comes to news and information about fish? Multicultural Fish Eater (n=220)



When looking for recipe inspiration, **multicultural fish eaters** similarly prioritize new flavors, affordable ingredients and easy directions, turning to YouTube.



N28. Where do you find most of your recipes? Multicultural Fish Eaters (n=220)
 N29. What inspires you to try a particular recipe? Multicultural Fish Eater (n=220)



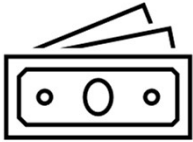
Reaching Your New Audiences

There's a lot of overlap between the **millennial** and **multicultural** fish eater, offering opportunity to reach them with similar messaging through similar channels.

Both audiences lean female, millennial and multicultural – making them feel seen in content and recognizing their stage in life is important.



They both value taste, unique and new flavors and affordability when purchasing fish and looking for new recipes to try.



YouTube is their top source for recipe inspiration while they trust fishers, research studies and dieticians for information about fish.



**No matter what,
sustainability remains key**

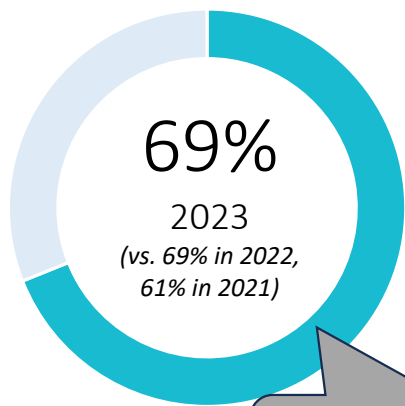




Sustainability remains important to purchase, ocean safety and future supply are priorities

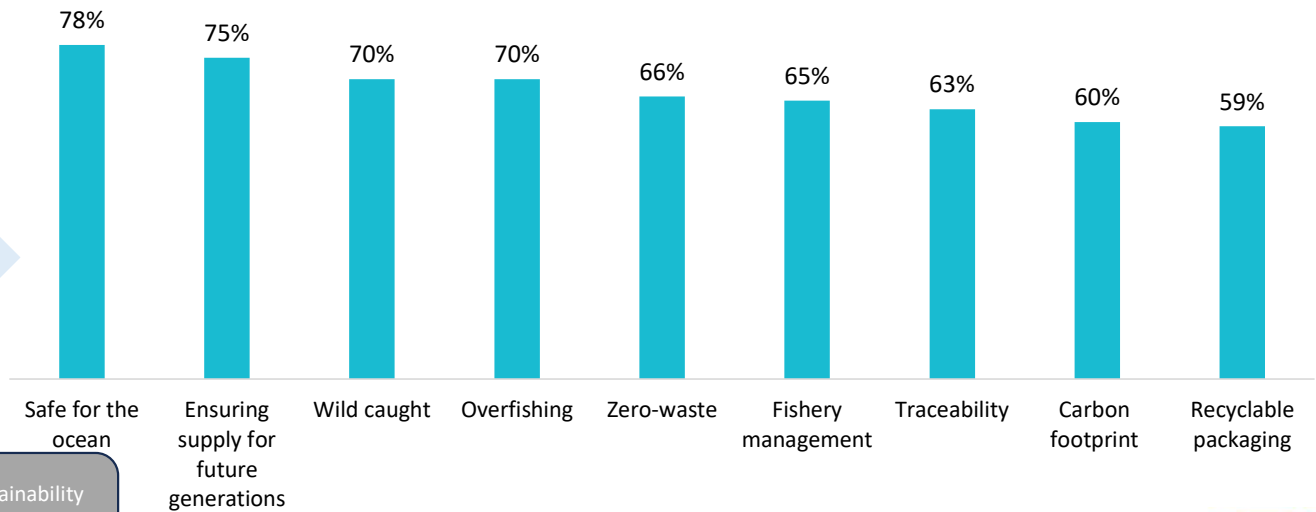


Importance of sustainability for Fish Eaters when purchasing/ordering fish (very / somewhat important)



Millennial Fish Eaters value sustainability more so than other generations (76% vs. 67% of Gen X vs. 66% of Boomers).

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



The importance of sustainability attributes were all on par with 2022 data.

N37. How important is sustainability to you when purchasing/ordering fish? Base: Fish Eaters 2023 (n=598), 2022 (n=640)

N38. When it comes to purchasing/ordering fish, how important are the following aspects of sustainability to you? Base: Fish Eaters 2023 (n=598), 2022 (n=640), 2021 (n=669)





Sustainability is even more important to **Millennials**



82%

of Millennials say sustainability is important to them when purchasing foods *(vs. 76% of Gen Z, 77% of Gen X and 69% of Boomers)*



50%

of Millennials have stopped purchasing food products they like because they were unsustainable *(vs. 52% of Gen Z, 33% of Gen X and 23% of Boomers)*



73%

of Millennials say environmental impact is important to them when purchasing foods *(vs. 72% of Gen Z, 70% of Gen X and 59% of Boomers)*

KETCHUM FOOD STUDY: Q28. IMPORTANT [i-ii] (Summary) - How important are the following to you when purchasing food products? Millennials (n=542)
KETCHUM FOOD STUDY: Q30. How much do you agree or disagree with the following statements about food purchasing and production? Millennials (n=542)



The role of provenance



Provenance remains important to purchase



Importance of Attribute to Fish Purchasing Decisions



54%

Product of the U.S.



49%

Wild Caught

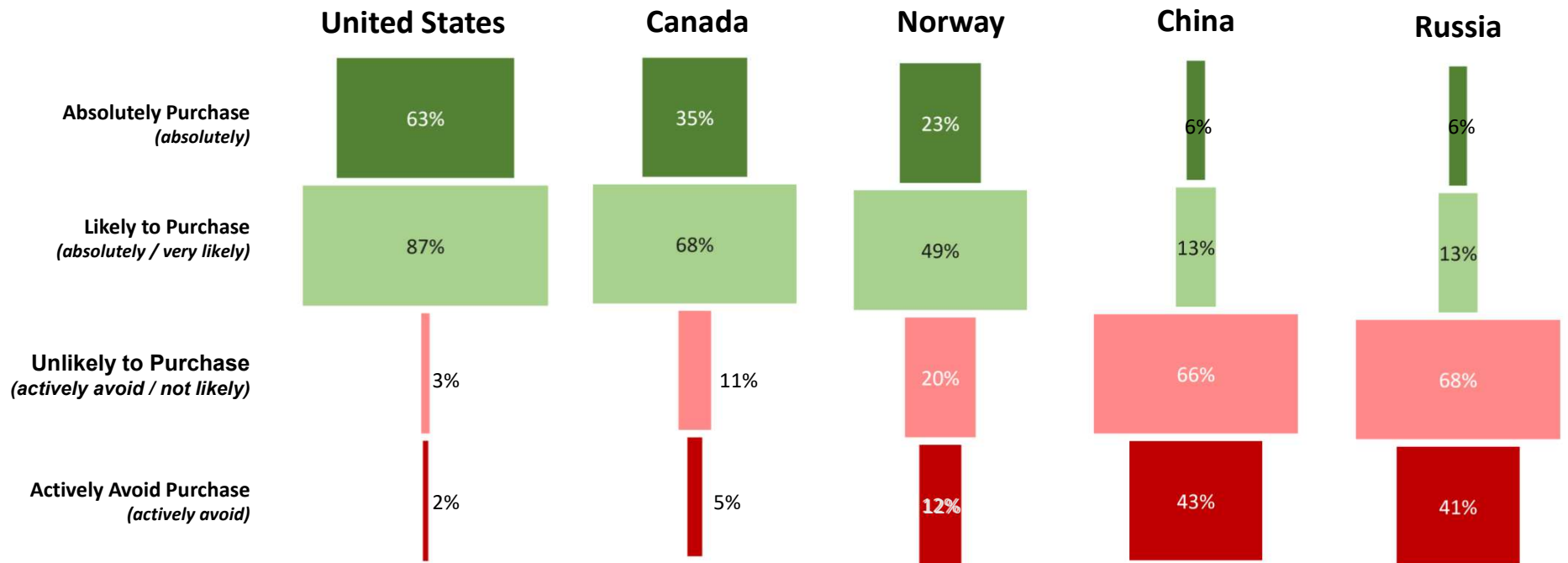


35%

Product of Alaska



Strong preference for fish from the US and Canada



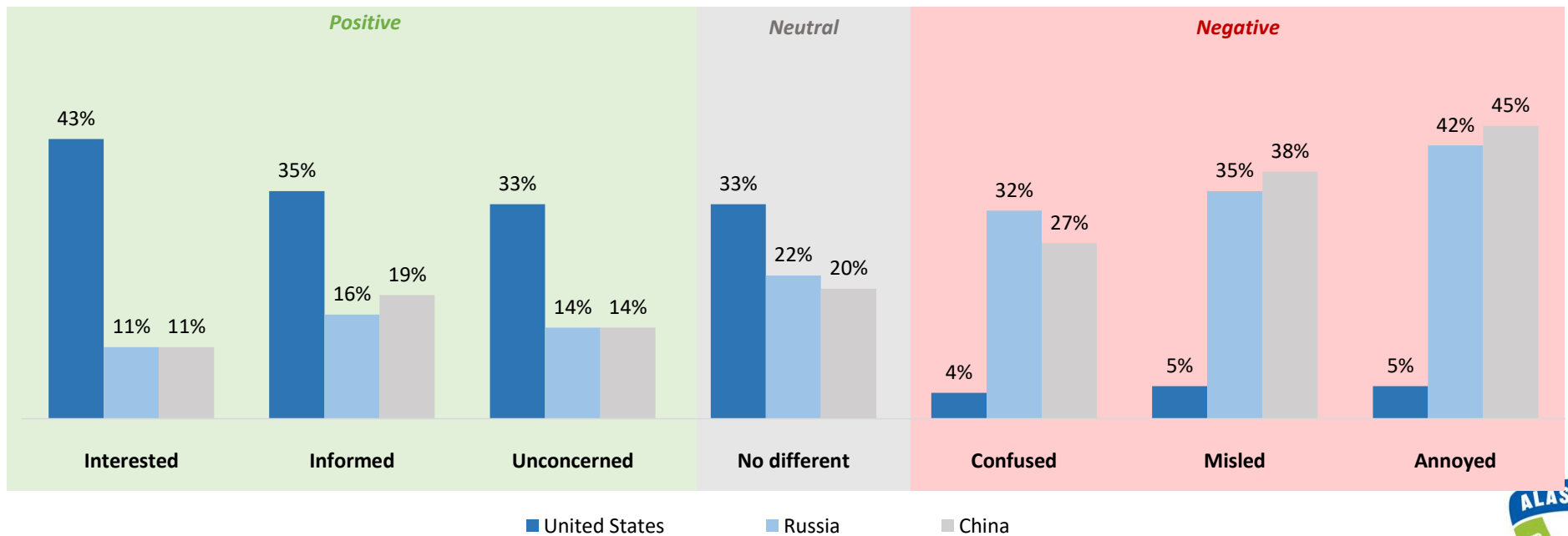
F10. When purchasing fish, how likely would you be to purchase fish from the following countries? Base: Fish Eaters (n=598)



Russian or Chinese provenance leads to buyers to feel annoyed, misled, and confused



Feelings Fish Eaters would experience if they learned that the fish they purchased from their local grocery store came from the following countries



F11. How would you feel if you learned the fish you purchased from your local grocery store comes from following countries? Base: Fish Eaters (n=598)



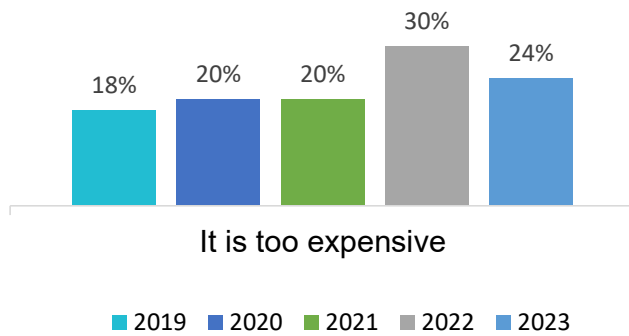
Driving fish purchases



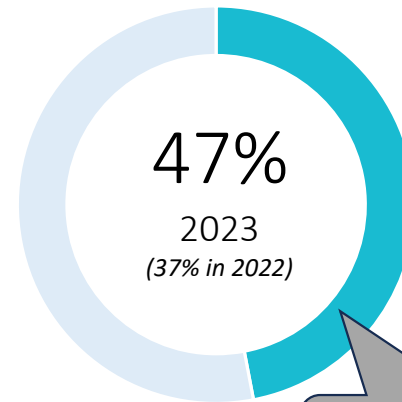
Affordability is key



What prevents Fish Eaters from consuming Wild Alaska Pollock or consuming it more often?

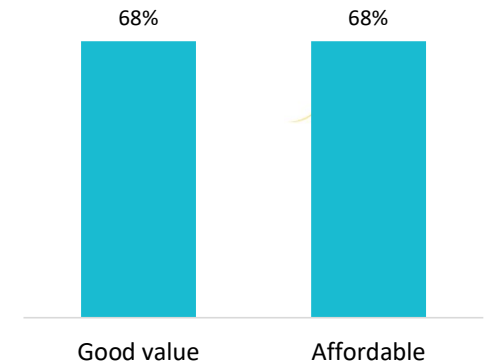


Inspiration for Fish Eaters to try a particular recipe – Affordable Ingredients



Affordable ingredients are more important to Millennial Fish Eaters YoY (45% 2023 vs. 34% 2022).

Important Fish Attributes for Fish Eaters (T3B on 10-pt scale)



Q25. Overall, what prevents you from consuming Wild Alaska Pollock or consuming it more often? Base: Fish Eaters aware of Wild Alaska Pollock 2023 (n=394); 2022 (n=419); 2021 (n=275); 2020 (n=449); 2019 (n=465)

N29. What inspires you to try a particular recipe? Base: Fish Eaters 2023 (n=598); 2022 (n=640)

Q8. Below is a list of attributes that people may use to describe fish. For each, please rate how important that attribute is to you when purchasing and/or ordering fish? Base: Fish Eaters 2023 (n=598)



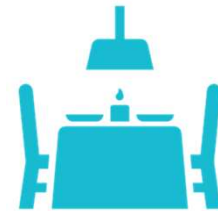
Millennials are particularly price sensitive



87%
of Millennials say price is
important to them when
purchasing foods



Millennials have a strict budget
when grocery shopping (**63%**)
and eating out (**58%**)



60%
of Millennials have turned
down going out to eat to save
money

KETCHUM FOOD STUDY: Q28. IMPORTANT [i-ii] (Summary) - How important are the following to you when purchasing food products? Millennials (n=542)
KETCHUM FOOD STUDY: Q14. How much do you agree or disagree with the following statements? Millennials (n=542)
KETCHUM FOOD STUDY: Q4: How much do you agree or disagree with the following statements regarding budgeting and shopping for food? Millennials (n=542)



We used statistical regression to measure the relationship between specific attributes and Wild Alaska Pollock purchase likelihood.

*Top Purchase Drivers
(Ranked)*

Great tasting
Fresh tasting
Safe to eat
Affordable
Heart healthy
Traceable
High quality
Flaky
Good value
Easy to prepare
Mild
Product of Alaska
Whole family will enjoy
GMO-free
Versatile



Top Taste Attributes

Great tasting
Fresh tasting
Flaky
Mild

Top Value Attributes

Affordable
Good value

Top Provenance Attributes

Traceable
Product of Alaska

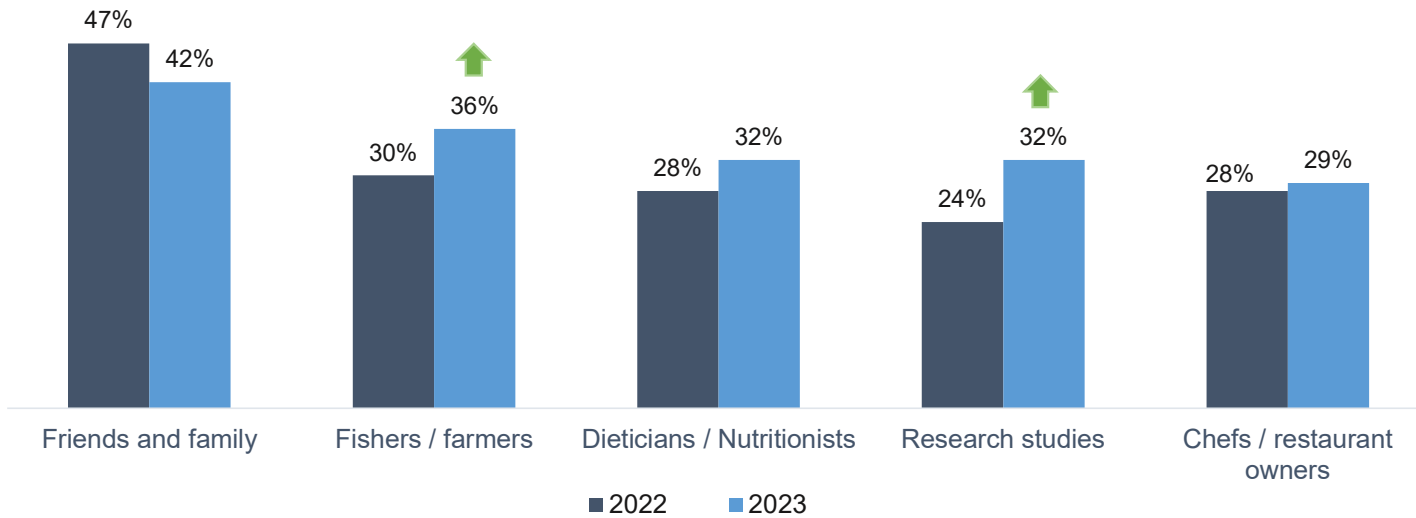
Mild taste, flaky texture, and its provenance will drive people down the funnel.

Fishers and research studies offer opportunity as trusted sources



- Millennials are driving up trust in experts, including fishers / farmers (39% 2023 vs. 34% 2022) and research studies (30% 2023 vs. 24% 2022).

Sources Fish Eaters trust when it comes to news and information about fish – Top 5



*Sample size is under 100

N30. Which of the following sources do you trust when it comes to news and information about fish? Base: Fish Eaters 2023 (n=598); 2022 (n=640); Gen Z Fish Eaters 2023 (n=55), 2022 (n=70); Millennial Fish Eaters 2023 (n=201), 2022 (n=176)

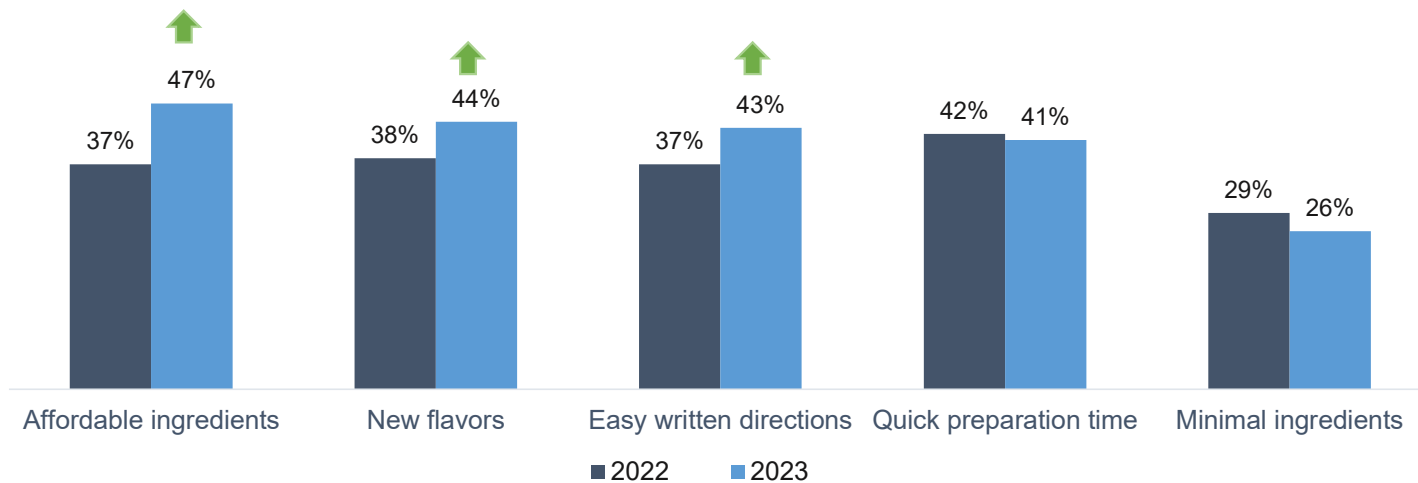


Affordability and flavor inspire experimentation in the kitchen



- Gen Z* (49% 2023 vs. 29% 2022) and Millennials (51% 2023 vs. 43% 2022) drive the heightened interest in new flavors.
- Secondary research shows that 73% of consumers are interested in spicy flavor options, including spicy appetizers, deserts, and beverages.
 - Over a quarter (26%) of Gen Z and Millennial men are also interested in hot and spicy flavored white fish.

Inspiration for Fish Eaters to try a particular recipe – Top 5



*Sample size is under 100

Sources: Flavor Innovation on the Menu, 2023 – Mintel; Fish and Shellfish, 2023 – Mintel

N29. What inspires you to try a particular recipe? Base: Fish Eaters 2023 (n=598); 2022 (n=640); Gen Z Fish Eaters 2023 (n=55), 2022 (n=70); Millennial Fish Eaters 2023 (n=201), 2022 (n=176)



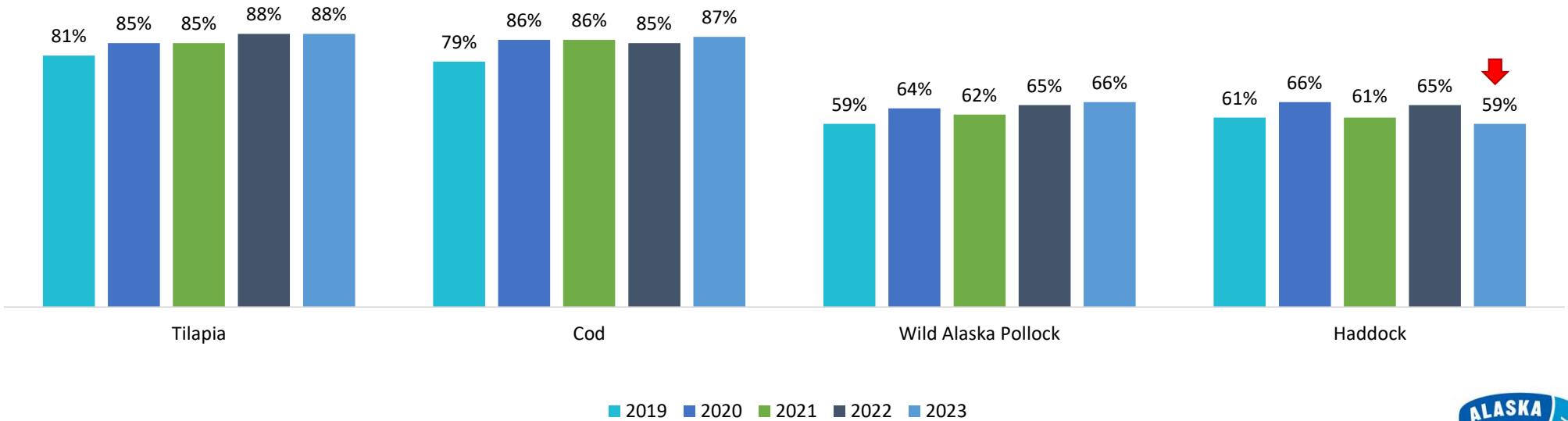
State of Wild Alaska Pollock and opportunities for industry



Wild Alaska Pollock awareness shows steady improvement over time, surpassing haddock for the first time



Fish familiarity
(Those who know a lot / some / only a little)



Arrows indicate a statistically significant change compared to 2022. 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 types of fish? Base: Fish Eaters 2023 (n=598); 2022 (n=640); 2021 (n=669); 2020 (n=764); 2019 (n=850)



What this means for the Wild Alaska Pollock industry

#1

Stay attuned to the **changing consumer landscape** and keep a pulse on new category entrants and those who may be aging out.

#2

Continue to prioritize Wild Alaska Pollock's **sustainability story**, sharing data-based messaging utilizing fishers as spokespeople.

#3

Continue to prioritize Wild Alaska Pollock's **provenance story**. Highlight that Wild Alaska Pollock is fished in the United States, particularly in Alaska, and its wild-caught story to resonate with the fish-eating consumer.

#4

Wild Alaska Pollock continues to see slight increases in familiarity among fish eaters, **surpassing haddock for the first time**.

#5

Create a consistent drum beat of news to stay top of mind with the fish-eating consumer, highlighting Wild Alaska Pollock's affordability, taste, provenance and unique flavor combinations.



Thank You!





Notes from the Test Kitchen with Celebrity Chef Antonia Lofaso & Amanda Buckle



Thank You!



Top Hand Award 2023
Top Hand Award 2023
Top Hand Award 2023



Past Recipients



Bob Desautel
2019



Margery Schelling
2020



Lou Shaheen
2021



Jason Martin
2022



2023





The 2023 Top Hand Award Goes To...



Einar Gustafsson

**Chief Executive Officer of American
Seafoods**

**Thank you, Golden Alaska for
Sponsoring our Delicious Lunch!**





**Thank you, Global Seas for the
Defender Series Wild Alaska Pollock &
Trans-Ocean and Aquamar for our
Surimi for lunch!**





Lunch

12:15 pm – 1:15 pm

Let's Get Talkin' About #WildAlaskaPollock!

Tag us on your pictures from today
to share the wonders of Wild
Alaska Pollock! Let's net-work!

#GAPPAM2023



@WildAKPollock



#GAPPAM2023

#GAPPAM2023

#GAPPAM2023





Port of Seattle Update

Commissioner Hamdi Mohamed, Port of Seattle



Thank You!





Fireside Chat with Chef Molly

Chef Molly, Climate Pledge Arena & Craig Morris, GAPP



Thank You!





Reaching our Target Audience with Influencers

Mary Elizabeth Germaine, Ketchum Analytics;

Angela Kim, Social Media Influencer;

Angelica Castaneda, Social Media Influencer

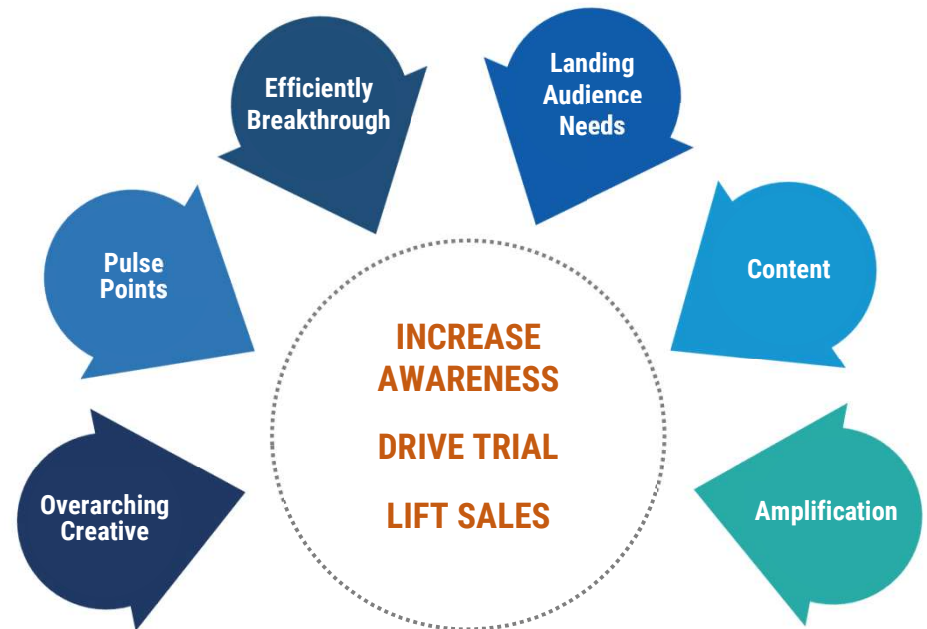
Deb Henderson, Ketchum PR

DRIVING TRIAL & AWARENESS FOR WILD ALASKA POLLOCK

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.

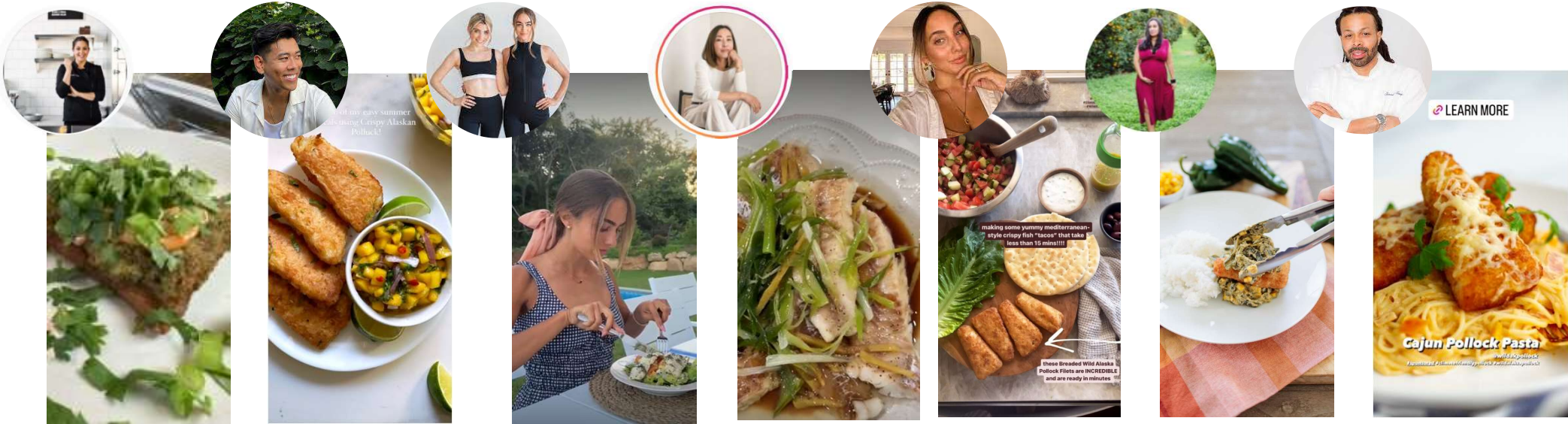
Research also shows that consumers are increasingly relying on social media trends, as well as friends and family, for trusted information and recipe inspiration.

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**.



DRIVING IMPACT THROUGH INFLUENCER MARKETING

GAPP's 2023 influencer campaign cultivates a community of celebrity and social media influencers, building on past partners as well as engaging with new fish-friendlies. Partnerships are creating a stream of best-in-class social content for GAPP and members to leverage across their own social platforms.



212  **July/Aug Pulse**
Current pulse being reported on

Sept/Oct Pulse

Jan/Feb Pulse



Data-Driven Influencer Marketing; Choosing the Right Influencers to Deliver Meaningful Impact



DATA-DRIVEN INFLUENCER MARKETING



DATA-DRIVEN INFLUENCER MARKETING



INFLUENCER IDENTIFICATION; EVALUATING SALES PROPENSITY

Our pre-campaign influencer analysis helped identify the influencers most likely to attract the highest Wild Alaska Pollock sales.

Initial shortlist of 40 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 22 influencers

Chosen based on their audiences' likelihood to purchase seafood or frozen seafood.

7 Influencers

4 mid-tier
3 micro



DATA-DRIVEN INFLUENCER MARKETING



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



Pete Eats
[@pete_eats](#)
 458K IG followers



Eliz + Dale
[@sweatsandthecity](#)
 120K IG followers



Angela J Kim
[@mommydiary](#)
 309K IG followers



Mikayla Shocks
[@mama.shocks](#)
 108K IG followers



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



Kenneth Temple
[@kenneth temple](#)
 28.6K IG followers



Millennial Flexitarians

- Alaska Pollock (Breaded / Frozen Fillet)



Millennial Flexitarians

- Alaska Pollock (Breaded / Frozen Fillet)
- Surimi



Fish-Friendly Parents

- Alaska Pollock (Breaded / Frozen Fillet)



Fish-Friendly Parents

- Alaska Pollock (Breaded / Frozen Fillet)



Fish-Friendly Parents

- Alaska Pollock (Breaded / Frozen Fillet)
- Surimi



Fish-Friendly Parents

- Alaska Pollock (Breaded / Frozen Fillet)



Millennial Flexitarians

- Alaska Pollock (Breaded / Frozen Fillet)
- Surimi

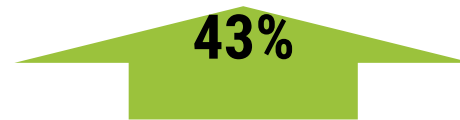
Chosen based on their followers' potential to increase Wild Alaska Pollock purchases.



Performance Results



JULY/AUGUST INFLUENCER CONTENT PROMPTED A POSITIVE LIFT IN WILD ALASKA POLLOCK PURCHASES



**Wild Alaska Pollock
Sales Lift for Influencer Content**

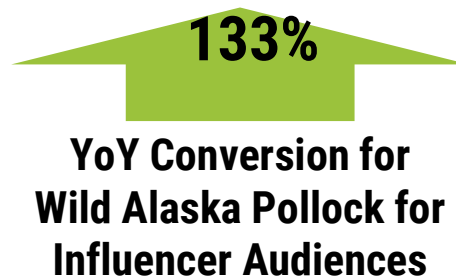
Influencer content prompted a 43% lift in Wild Alaska Pollock among people who saw the campaign vs. those that did not.



Campaign sales period analyzed 6/18/2023 – 8/30/2023.



CONTENT ALSO DROVE AN INCREASE IN PURCHASES AMONG INFLUENCER AUDIENCES YOY



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

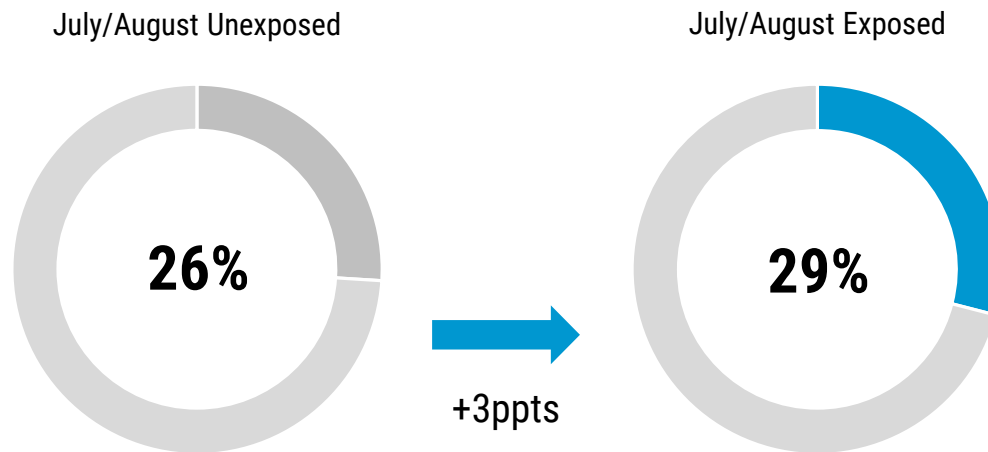


Campaign sales period analyzed 6/18/2023 – 8/30/2023.



SEPTEMBER INFLUENCER CONTENT INCREASED FAVORABLE OPINION OF WILD ALASKA POLLOCK

Favorable Opinion of Wild Alaska Pollock[^] *(excellent / very good)*



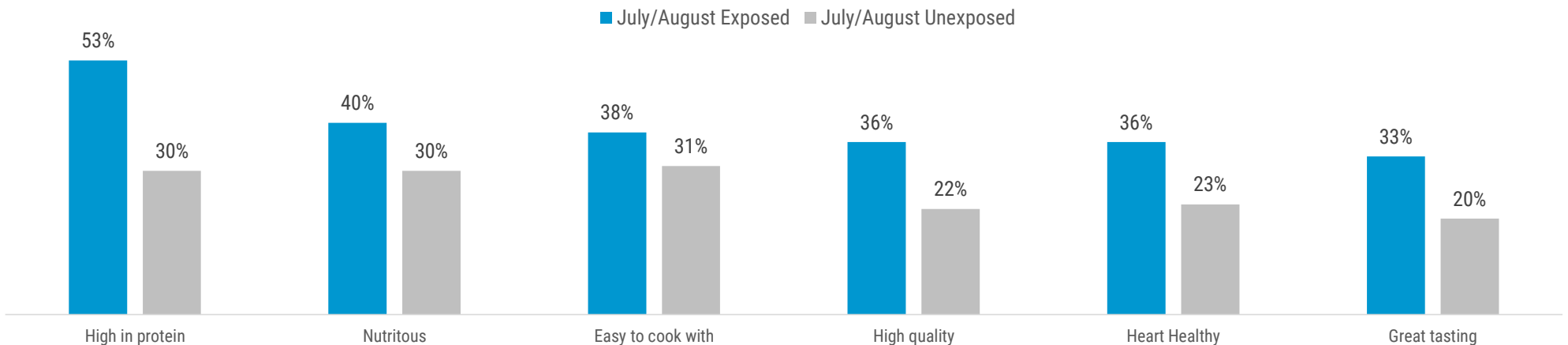
[^]Directional difference between Exposed and Unexposed audiences.



THIS WAVE OF INFLUENCER CONTENT SUCCESSFULLY IMPROVED PERCEPTIONS OF PROTEIN, NUTRITION, EASE OF COOKING, QUALITY, HEALTH, AND TASTE

Those exposed to the July/August campaign are more likely to associate a variety of positive attributes with Wild Alaska Pollock. For future campaigns, there are opportunities to communicate the benefits of wild-caught, fresh taste, and affordability.

Attributes Associated with Wild Alaska Pollock[^]



[^]Directional difference between Exposed and Unexposed audiences on all except "None of the above."



Panel Discussion





Angelica Castaneda

[@angelicacastaneda_](https://www.instagram.com/angelicacastaneda_)

46K IG followers



Angela J Kim

[@mommydiary](https://www.instagram.com/mommydiary)

309K IG followers



Thank You!





A COLLECTION OF RECIPES
FOR THE SUMMER WITH THE
PERFECT PROTEIN -



Partnership Program Success from 2023

Mike Tigani, King and Prince;

Jake Holbrook, Gorton's;

Lou Shaheen, Trans-Ocean;

Tracey Schram, Fujisan;

Ron Rogness, GAPP



GAPP CONGRATULATES 2024 PARTNERS!





GAPP Welcomes Back Returning North American Partners in 2024!



Sam's Club 2024 Wild Alaska Pollock Product Campaign!

- Channel: Club Stores
- Back to School focus in fall of 2024
- Features one new and one existing product



Win with Wild Alaska Pollock on Campus!

- Channel: Educational and Business Foodservice
- Target: Students, Millennials
- Features four Wild Alaska Pollock products



Craft Beer-Battered Wild Alaska Pollock Fillet Campaign!

- Channels: Casual dining and taverns/pubs
- Potential for new chain customer
- Digital/Social media, POP and buyer engagement





GAPP Welcomes Back Returning North American Partners in 2024!



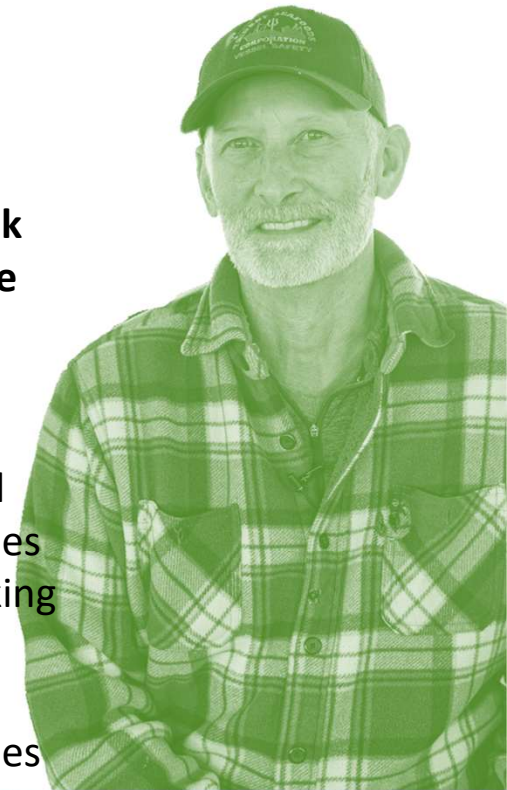
Surimi Education Campaign Using Social/Digital Media!

- Target consumer: 18 – 44
- All Retailers
- Point of emphasis is Crab Classic is REAL seafood
- Digital and social media with influencer engagement



GAPP/Trident Seafoods/Oak View Group/Climate Pledge Arena/Seattle Kraken Partnership!

- Focus on under-penetrated sports/entertainment venues
- Take proof of seafood working at CPA to Oak View Group portfolio of sports/entertainment venues





GAPP Welcomes New North American Partners!



GAPP/H-E-B Retail Media Partnership!

- Features H-E-B's "Great Catch" line of Wild Alaska Pollock surimi and fillet products
- Comprehensive Omnichannel approach



Arby's Crispy Fish Sandwich Campaign!

- Lent promotion of Arby's signature crispy Wild Alaska Pollock fillet sandwich
- National coverage on owned Arby's social media, paid social and digital radio





GAPP Welcomes First-Ever Japanese Partners!



Taste the Deliciousness of Spicy Wild Alaska Pollock Roe at Costco Japan!

- Emphasizes the superiority of Wild Alaska Pollock Roe over Russian product
- In-store promotions in all Japan Costco locations



Incremental Sales Lift of Wild Alaska Pollock Kanikama for Costco Japan!

- Promotes product launched in Japan Costco stores in November, 2022
- In-store demos, recipes, promotional pricing and celebrity endorsement





GAPP Da La Bienvenida los socios hispanos!



Japanese Temptation!

- Emphasizes Japanese origin and superiority of Wild Alaska Pollock Krissia® brand surimi
- Supported by broadcast TV commercials, influencer social/media and SEO and SEM



Alaska Taste to Colombia!

- First Colombian Partner
- Promotes six surimi and fillet products launched in 2022
- Will promote in retail, foodservice and school lunch channels





Thank You!





**10-Minute Break—Thank You,
Beck Pack Systems**

Let's Get Talkin' About #WildAlaskaPollock!

Tag us on your pictures from today
to share the wonders of Wild
Alaska Pollock! Let's net-work!

#GAPPAM2023



@WildAKPollock



#GAPPAM2023

#GAPPAM2023

#GAPPAM2023





Gallagher



**Thank You—Gallagher
Insurance!**



Seafood's Opportunity in Entertainment Venues

Brian Carriveau, Climate Pledge Arena;
Taylor Graham, MLS Seattle Sounders FC;
Chris Voigt, MLB Seattle Mariners;
Justin Moser, DubSea Fish Sticks



Thank You!





Pollock People: The faces behind the Campaign

Jeff Crain, F/V Sovereignty & Trident Seafoods;

Emily Gibson, UniSea;

Ruthie Anderson, Trident Seafoods;

Tim Dyasuk, American Seafoods;

Mick O'Brien, Ketchum PR



Thank You!



**THANKS FOR
CELEBRATING
WITH US!**

WILD ALASKA POLLOCK



**ANNUAL
MEETING
2023**





THANK YOU SPEAKERS!





Thank you for the amazing product!



THANK YOU SPONSORS!



Supporting Sponsors: Alaska Fisheries Development Foundation, Angulas Aguinaga, Bank of America, Neptune Snacks, Perkins Coie, Restaurant Depot



**Thank you, Bob, for your
leadership and passion.**

Save the Date for the 2024 Wild Alaska Pollock Annual Meeting



SEPTEMBER 26, 2024

SEATTLE, WA

WILD ALASKA POLLOCK



**ANNUAL
MEETING
2023**



THANK YOU ALL!