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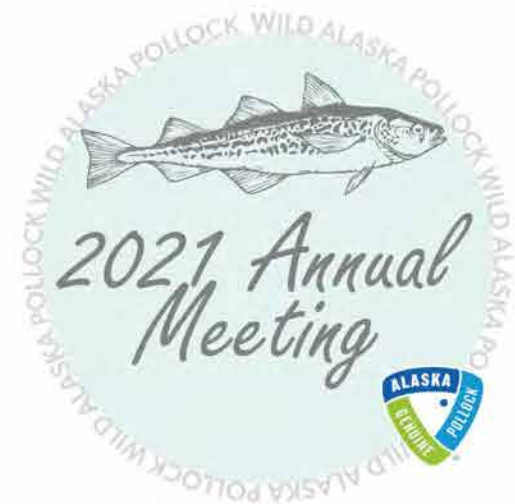
Clark Nuber PS

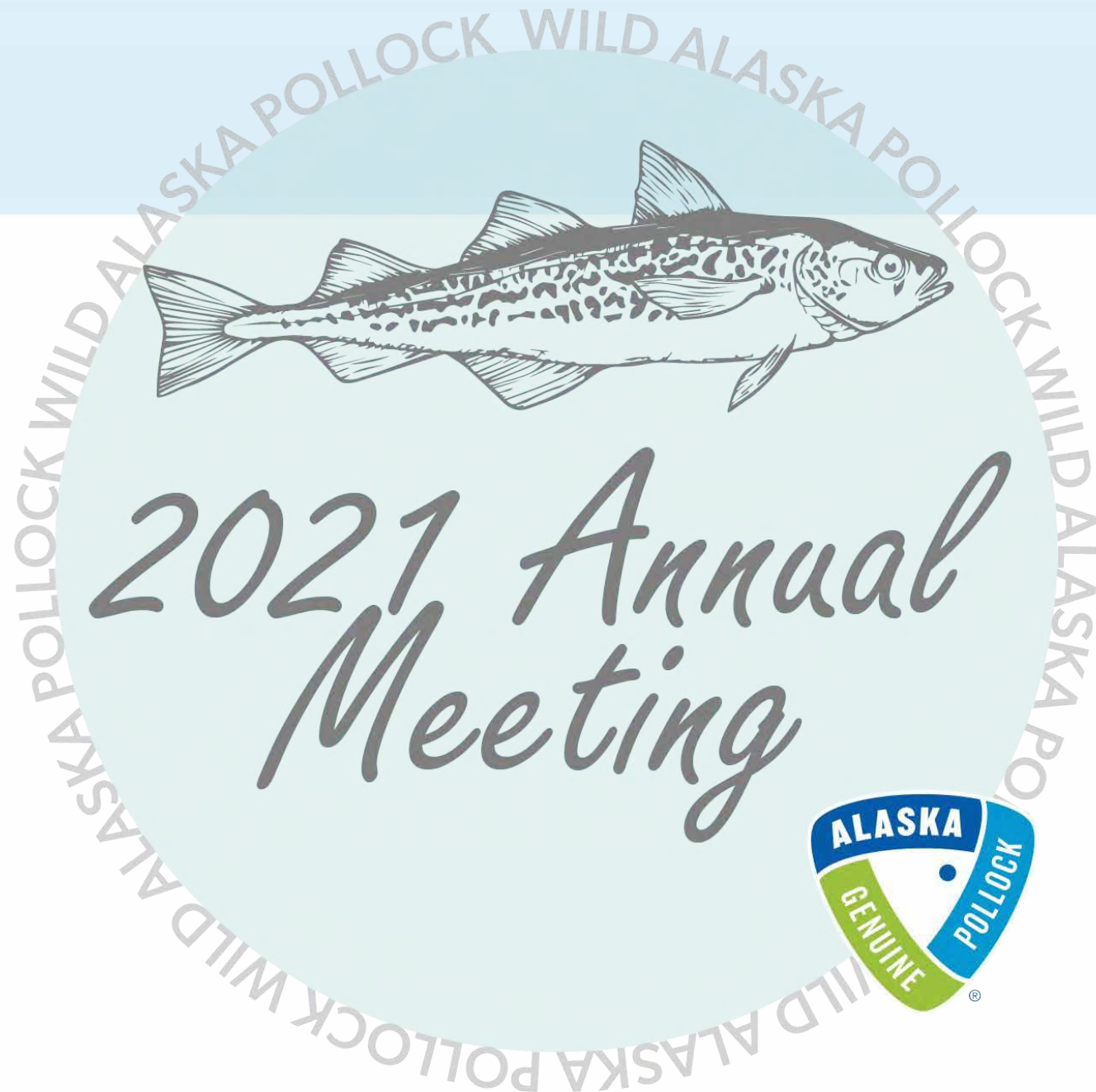


Thank you to our title sponsor



Glacier Fish Company produces the high quality frozen-at-sea groundfish like Wild Alaska Pollock and is a key role in helping bring our perfect protein to plate.





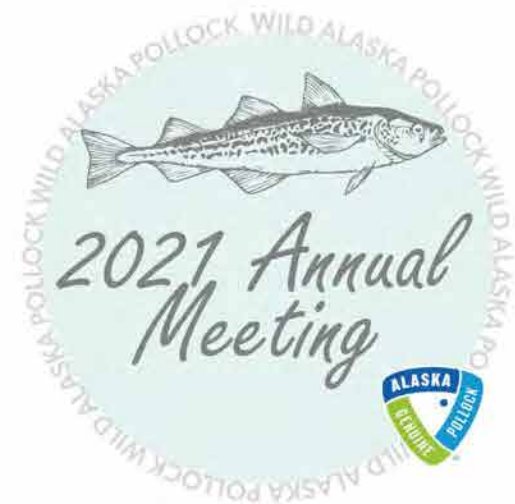
"Harnessing
Surimi's
Star Power"



Opening Remarks



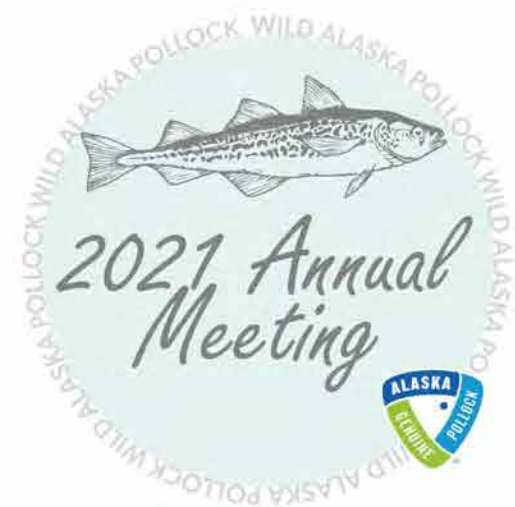
Mikel Durham
CEO of American Seafoods



Welcome from our special guest!



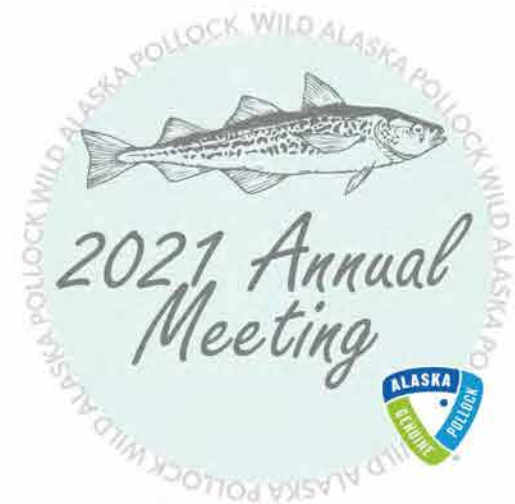
Senator Lisa Murkowski



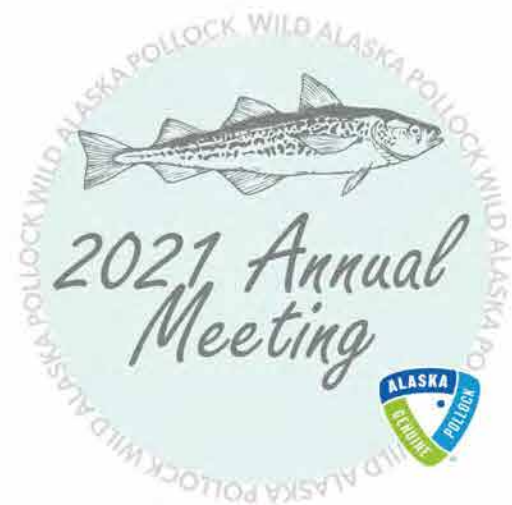
Welcome from our special guest!



Senator Dan Sullivan



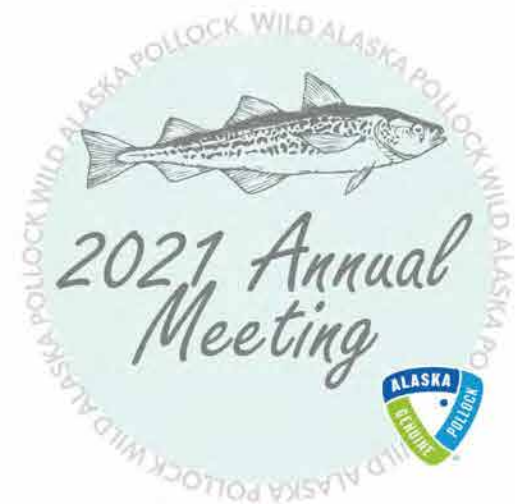
Thank you GAPP Board of Directors!



Disruption & GAPP's Next Big Idea



Craig Morris
*CEO of Genuine Alaska Pollock Producers
(GAPP)*



Back-to-School and National Seafood Month Campaign



Key Messages

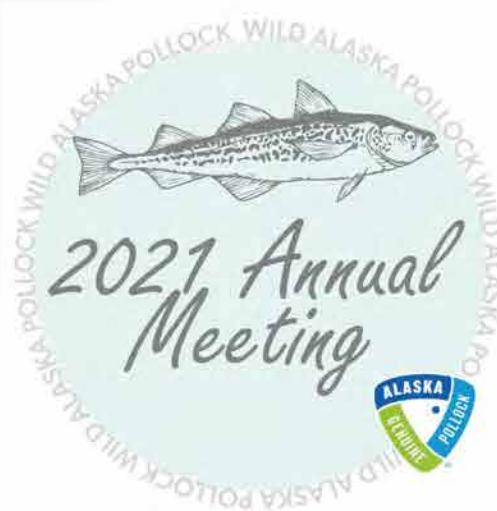
Primary: Wild Alaska Pollock is a quick and easy protein option that you and your family can feel good about because it's good for you and good for the planet.

Secondary:

Wild Alaska Pollock is a versatile, mild, flaky whitefish that has a taste that your kids will love. *(Taste/Preparation)*

Wild Alaska Pollock is packed with 20 grams of protein and essential nutrients. *(Nutrition)*

Wild Alaska Pollock has the lowest carbon footprint of all proteins, with only 3.77 kg of CO2-eq per kg of protein. *(Sustainability)*



WITH GENUINE ALASKA
POLLOCK PRODUCERS



Made from sustainable,
kid-friendly Wild Alaska Pollock



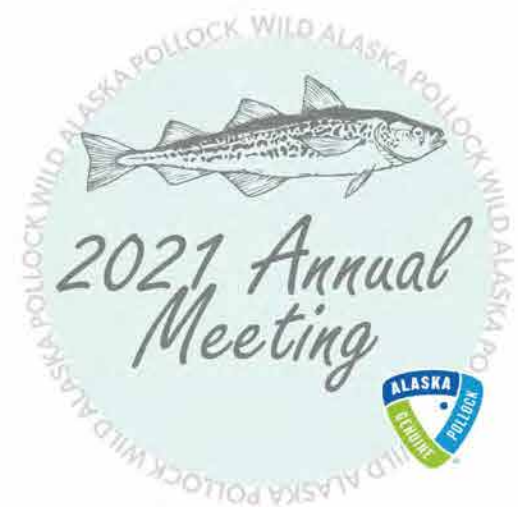
#KidFriendlyPollock

"But the *shining star* of **Alaska Pollock** is the ***omega-3s*** that it provides—between **50 to 1,000 milligrams of omega 3s per serving**"

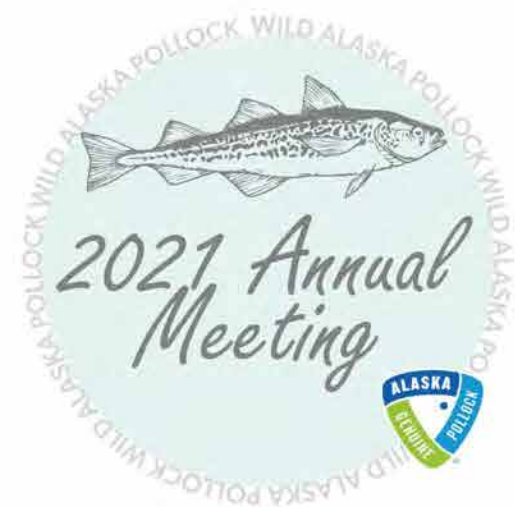


Over 1.5 Million Impressions so far!

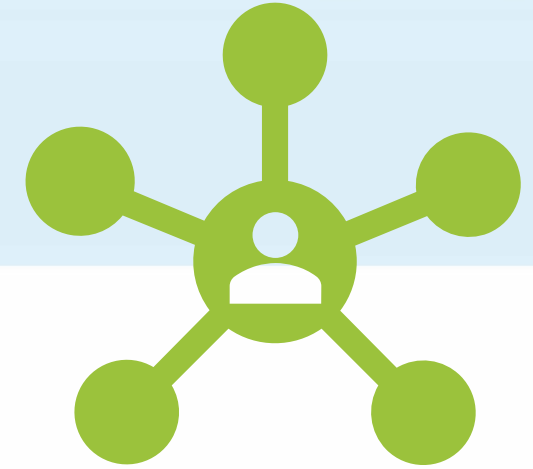
Thank you
for joining
us!



Thanks for
being patient
with us 😊

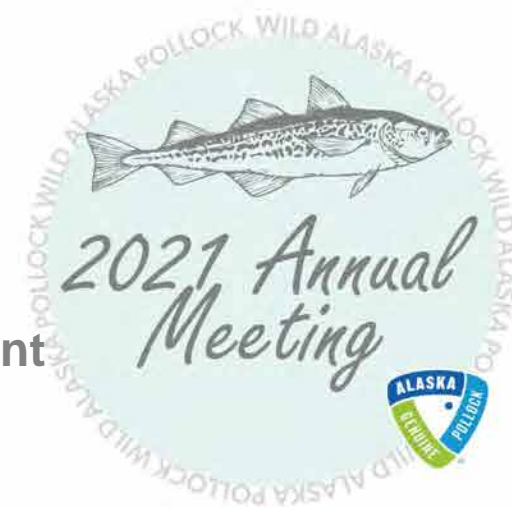


Thank you to GAPP Members



Akutan Catcher Vessel Assoc.
Alyeska Seafoods
American Seafoods
Aleutian Pribilof Island Community
Development Assoc.
Arctic Fjord/Artic Storm
Bristol Bay Economic Development Corp.
Central Bering Sea Fishermen's Assoc.
Coastal Villages Region Fund
Glacier Fish Company
Global Seas
Golden Alaska Seafoods
High Seas Fleet Cooperative

Icicle Seafoods
Northern Victor Fleet Cooperative
Norton Sound Economic Development Corp.
Ocean Beauty Seafoods
Peter Pan Fleet Cooperative
Peter Pan Seafoods
Starbound
Trident Seafoods
Unalaska Fleet Cooperative
UniSea
UniSea Fleet Cooperative
Westward Fleet Cooperative
Westward Seafoods
Yukon Delta Fisheries Development
Assoc.



Thank you!

Gold-level Associate Members



Sea. Taste. Enjoy!®



Thank you!

Silver-Level Associate Members



FRONTIER PACKAGING

GIRARD

WOOD PRODUCTS, INC.

KeyBank



Thank you!

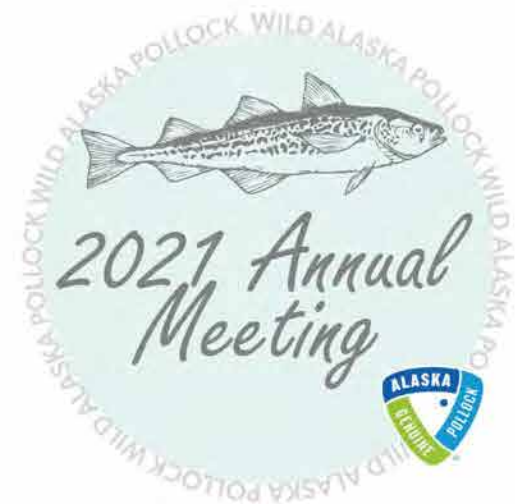
Bronze-Level Associate Members



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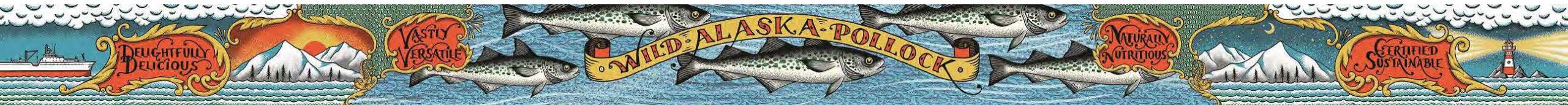
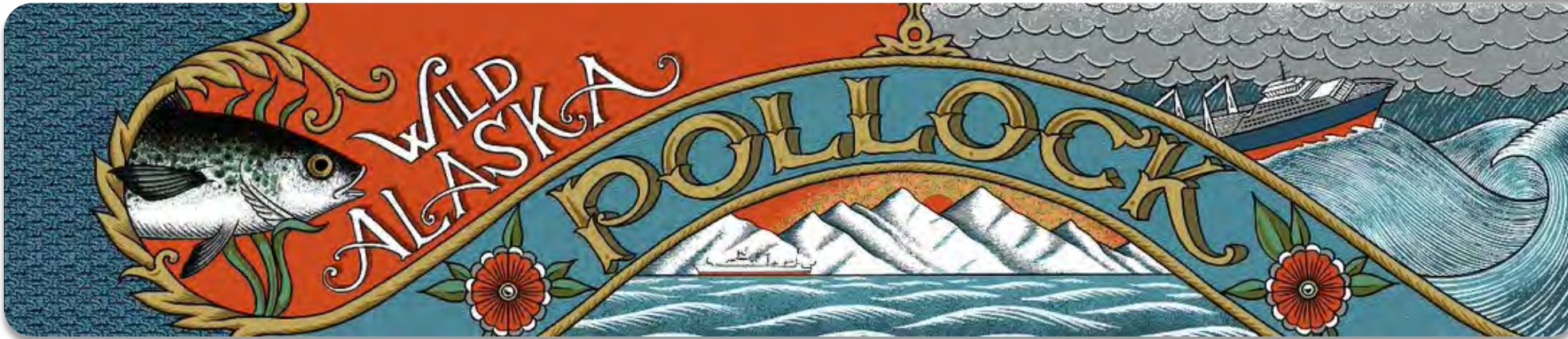


Glacier Fish Company produces the high quality frozen-at-sea groundfish like Wild Alaska Pollock and is a key role in helping bring our perfect protein to plate.



Seattle's Pier 91 Wild Alaska Pollock Mural

GAPP is commissioning this mural that will be on the north face of the building that faces where thousands of cruise passengers arrive each year as well as the nearby Seattle neighborhood of Magnolia. There will also be a 100' long mural on the fence that runs along the side of the building that highlights the compelling attributes of our amazing fish.



Thank you to our sponsors!



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MARKET PRICES, NEWS, AND ANALYSIS

Clark Nuber PS



Welcome today's speakers!





*We appreciate the hard work
and dedication of the Wild
Alaska Pollock industry!*



**WE'RE SO GLAD
YOU'RE HERE!**

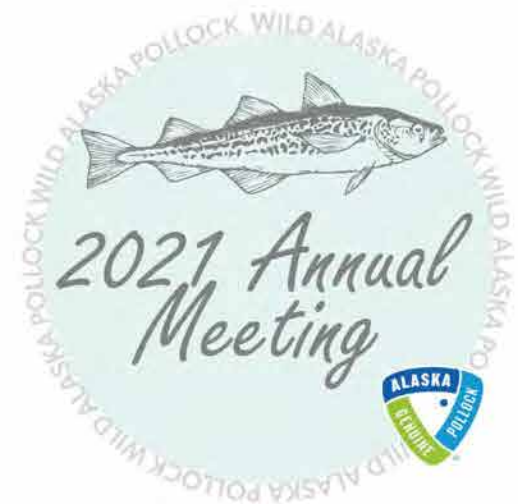
Thank you to our
Registration Bag Sponsors



NEPTUNE



#GAPPAM2021

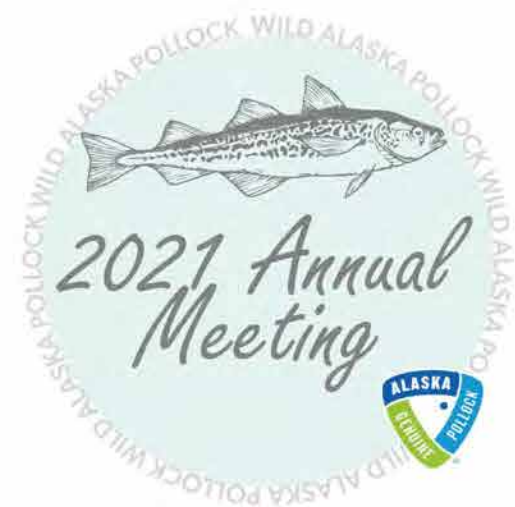


Meeting Etiquette

The only way we are taking questions is through the Q&A button at the bottom of the screen:

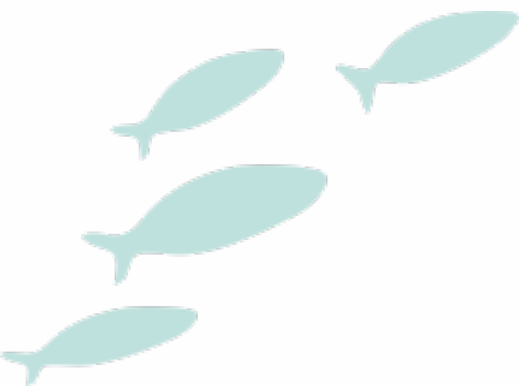
Please wait patiently and your question will be answered by the end of each session.

**Also, speakers will be available at the end of the day if you have any additional questions if you are not available at the time of their presentation.*

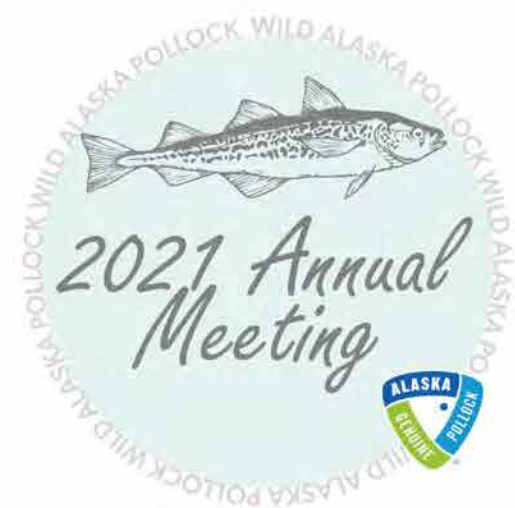




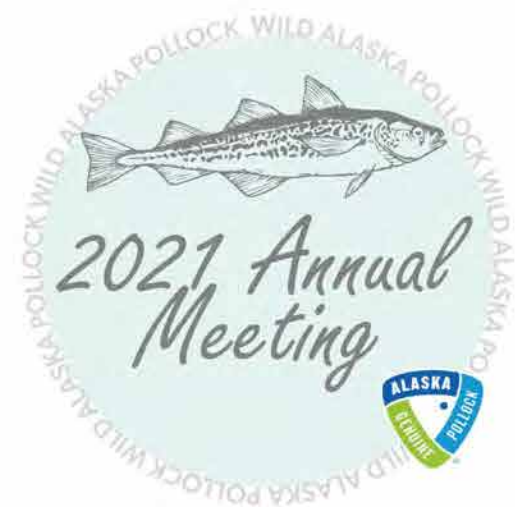
Ron Rogness
*Research Consultant for Genuine Alaska Pollock
Producers (GAPP)*



Wild Alaska Pollock Fishery Update



Consumption and Fishery Performance Overview



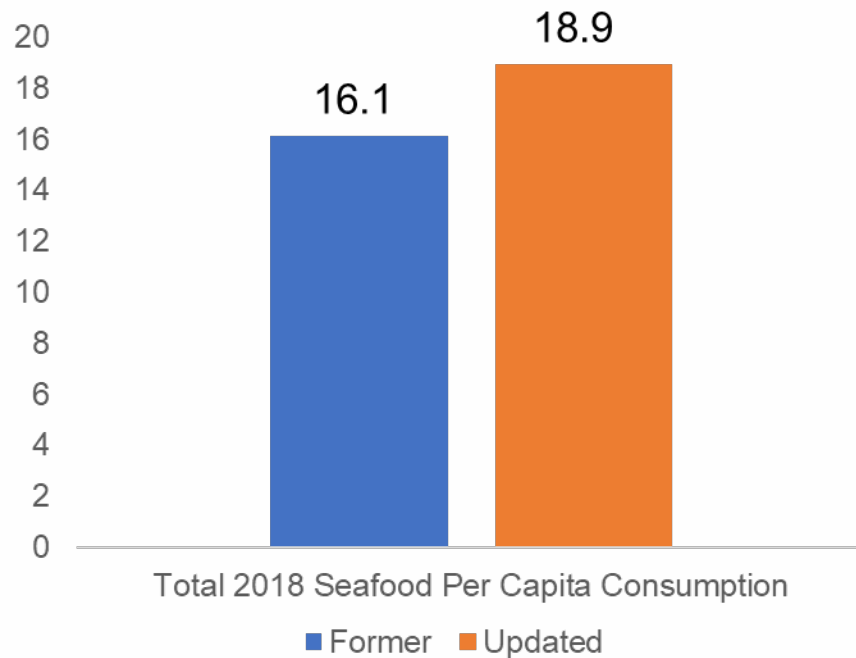
Per Capita Consumption of Pollock/Wild Alaska Pollock

- Edible weight product disappearance: Domestic – Exports + Imports
- No account for inventory changes
- Domestic Supply = Amount consumed
- Historically, NOAA did not use actual production of products made from Wild Alaska Pollock, even though data exists and did not look at the resulting consumption of individual species

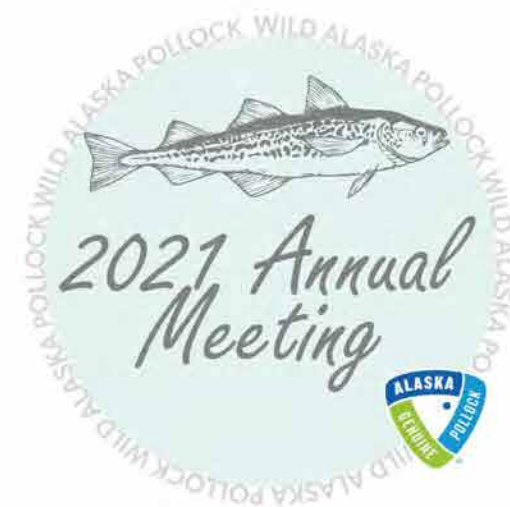
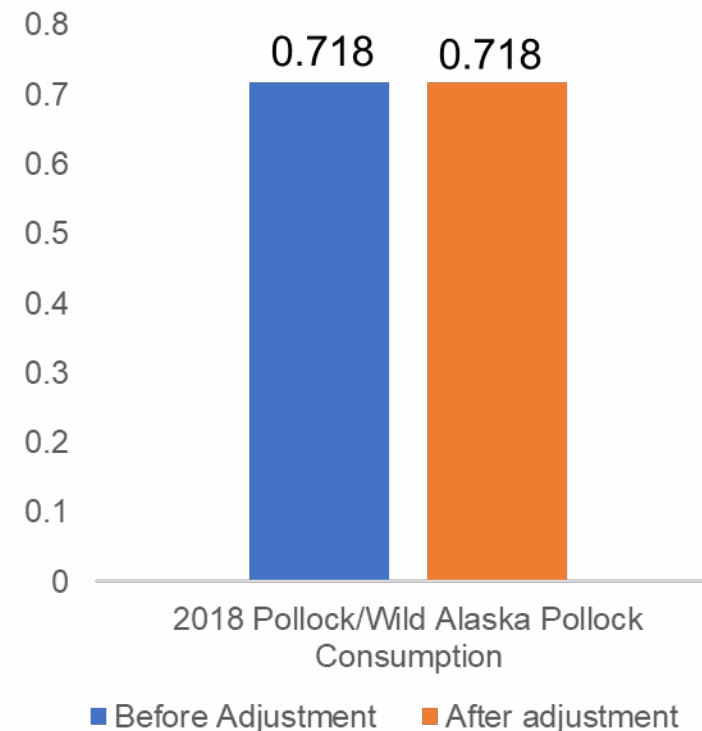


NOAA attributed the increase in per capita consumption to changes in how they calculated Wild Alaska Pollock supply

NOAA's change increased
per capita consumption by
2.8 pounds

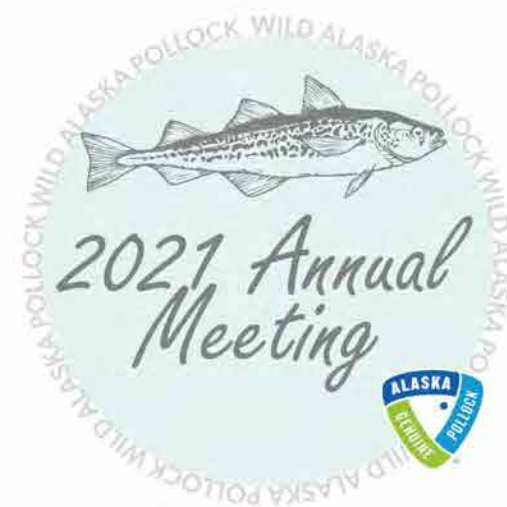


GAPP's calculation of Pollock/Wild Alaska Pollock consumption unchanged

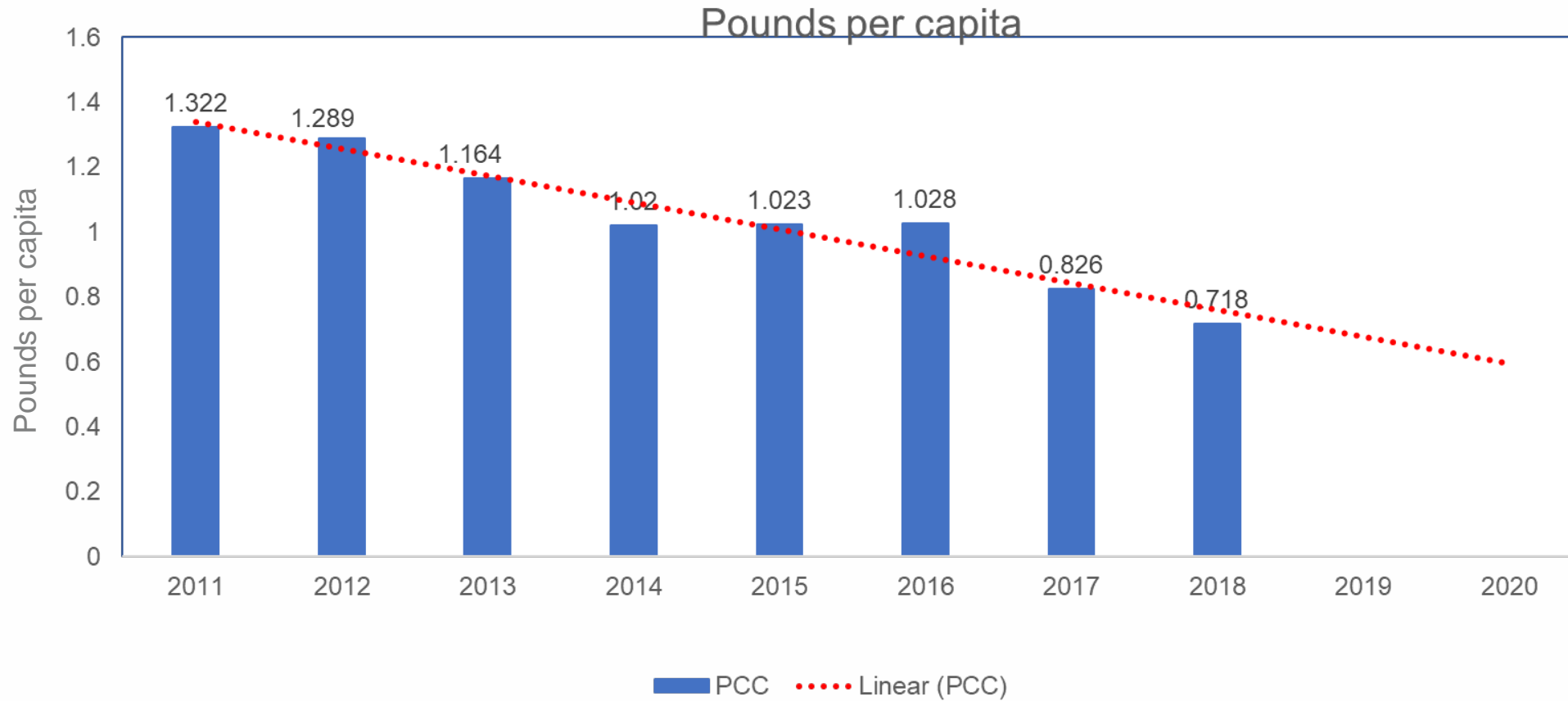


Why actual PCC of Wild Alaska Pollock/Pollock did not change

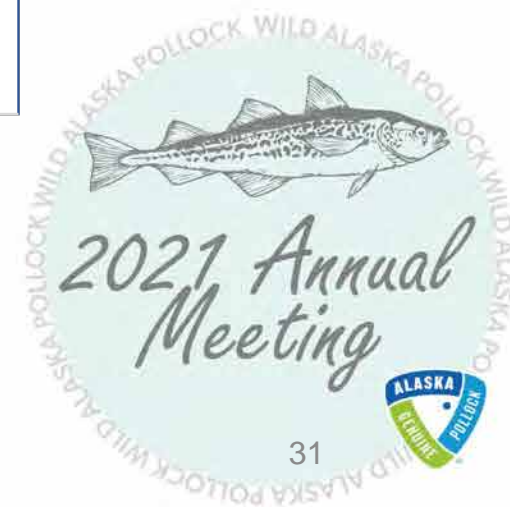
- NOAA's prior method relied on assumed yields to convert catch weight to edible weight
- These yields were from estimates in the early 90s and did not reflect increases in yields post-American Fisheries Act
- In other words, NOAA changed their model so it is now consistent with how GAPP/NFI calculated the consumption
- It is highly likely that their previous method resulted in negative Wild Alaska Pollock supply in U.S.



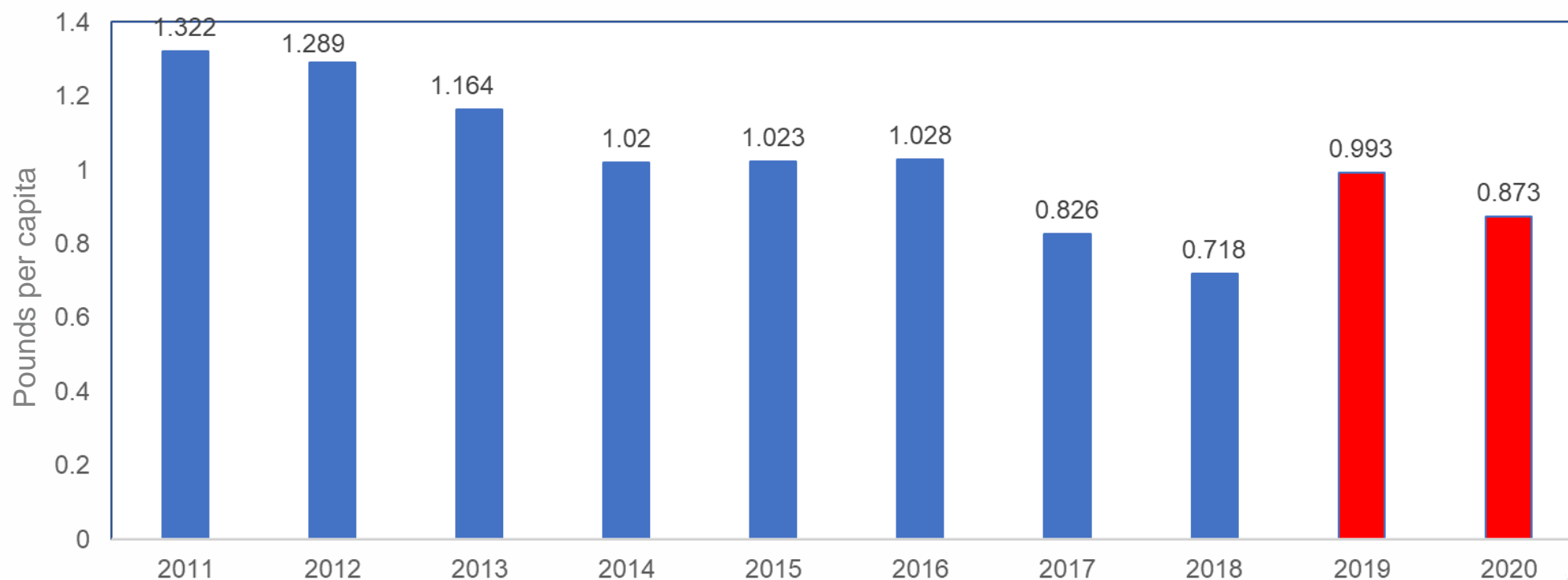
When I last presented to you, this is what U.S. PCC of Pollock/Wild Alaska Pollock looked like



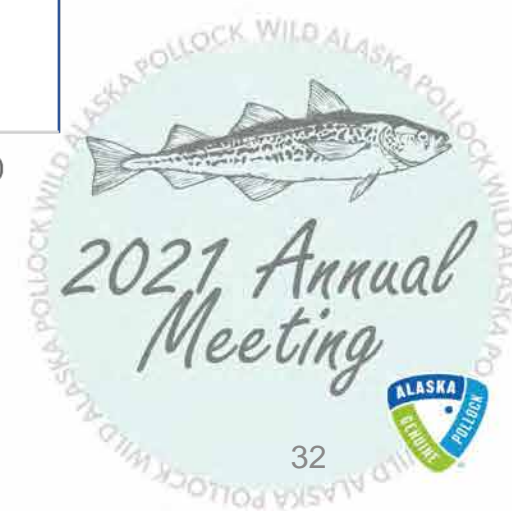
Source: NOAA , US Census Bureau



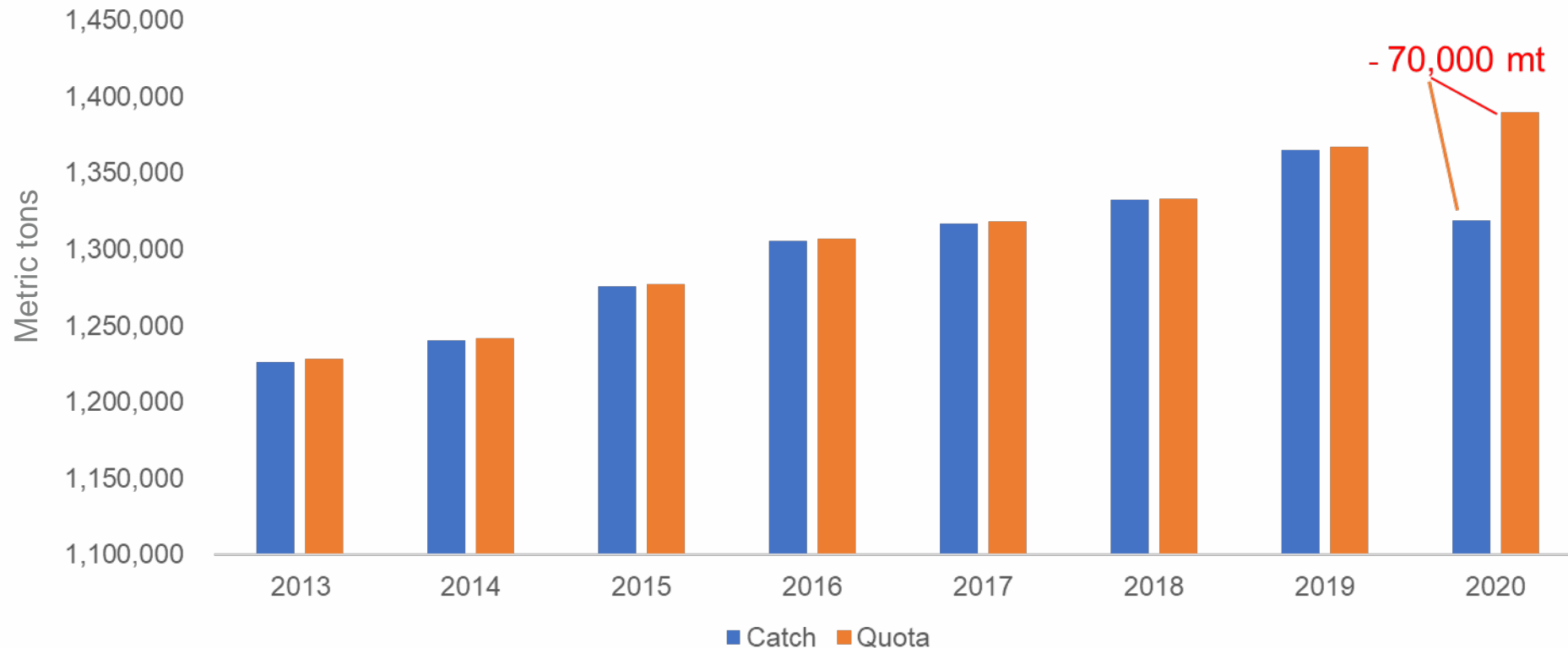
Since then, we saw a record jump in U.S. PCC in 2019, receding somewhat in 2020



Source: NOAA , US Census Bureau



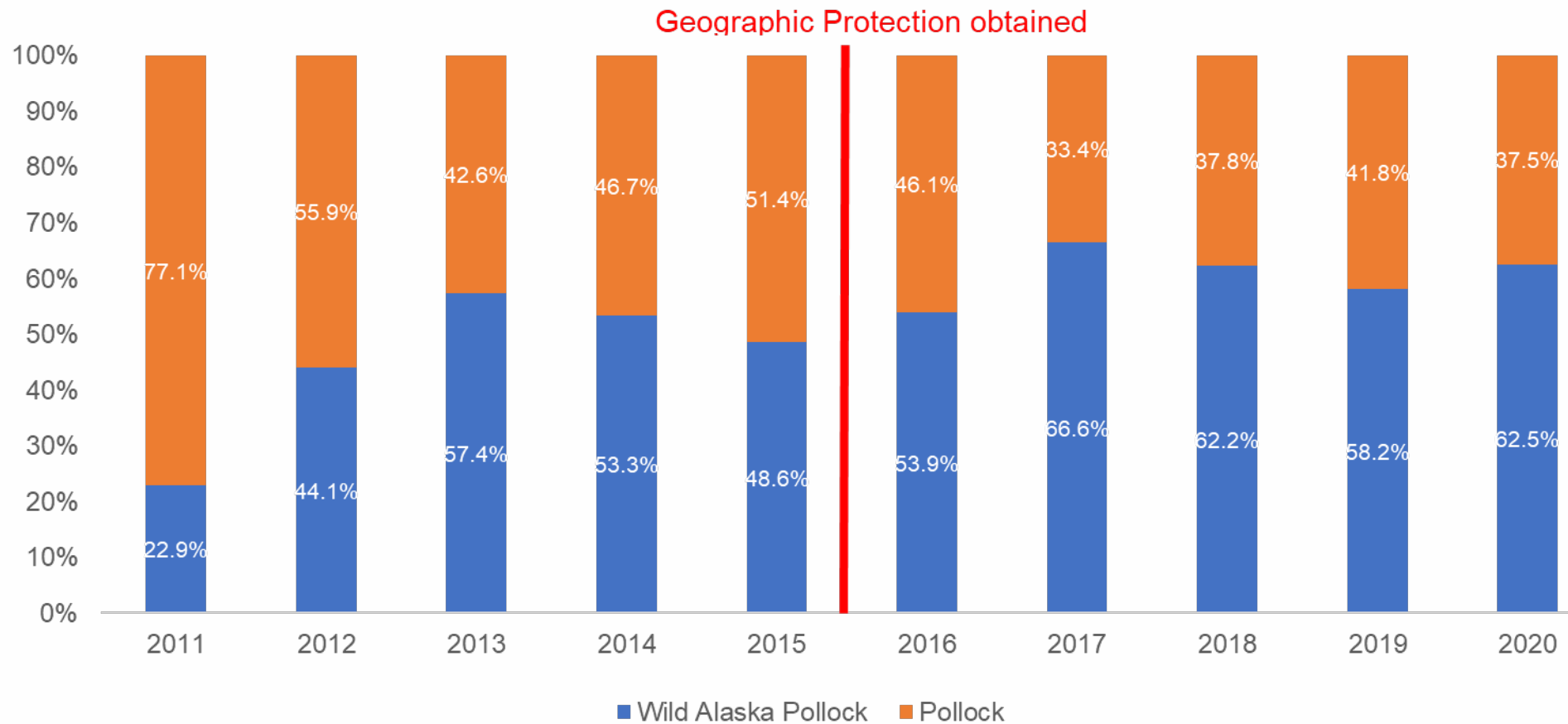
The decline in Wild Alaska Pollock consumption in 2020 was a product of the shortfall in Bering Sea catch due to COVID-19 outbreaks



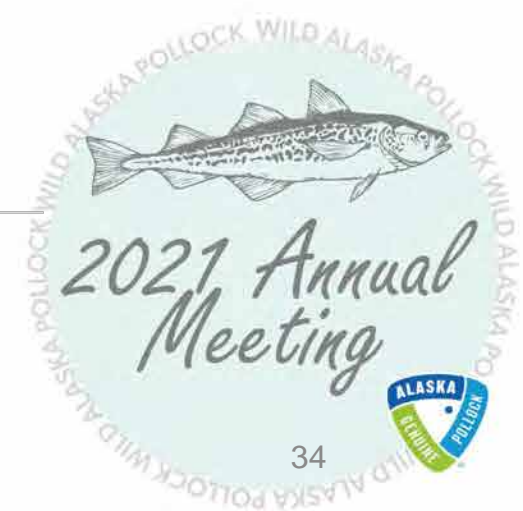
Source: NOAA



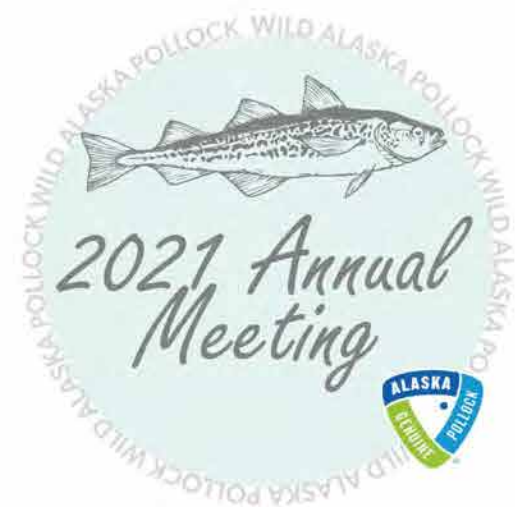
Since obtaining geographic protection for the name “Alaska Pollock” in US, the percentage of consumption of Alaska Pollock has increased from 45.3% to 60.7%



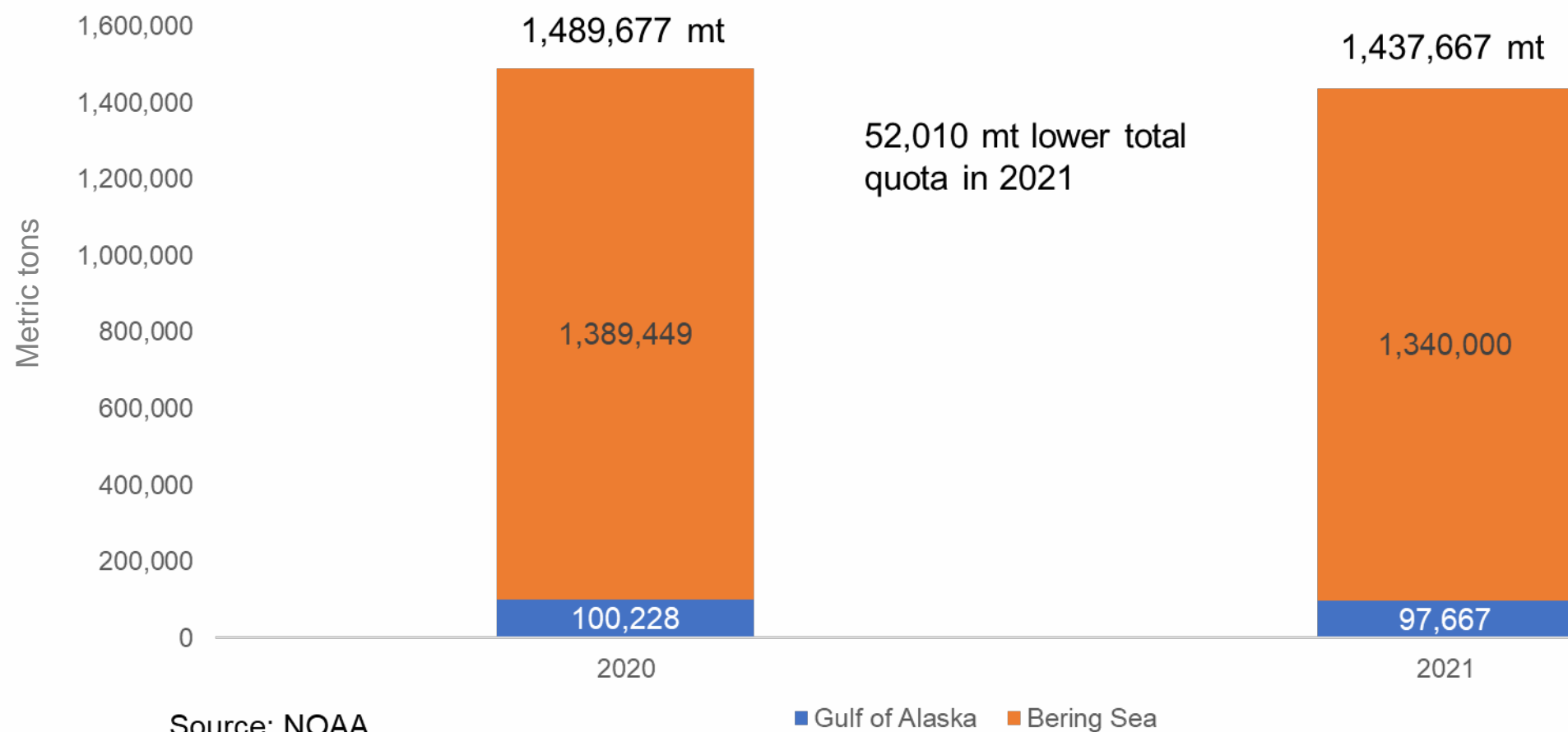
Source: NOAA , US Census Bureau



2021 Wild Alaska Pollock Fishery Performance

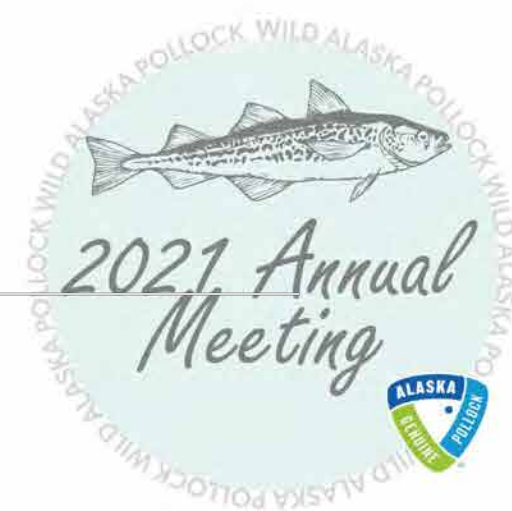


Quotas were reduced for both GOA and Bering Sea fisheries in 2021

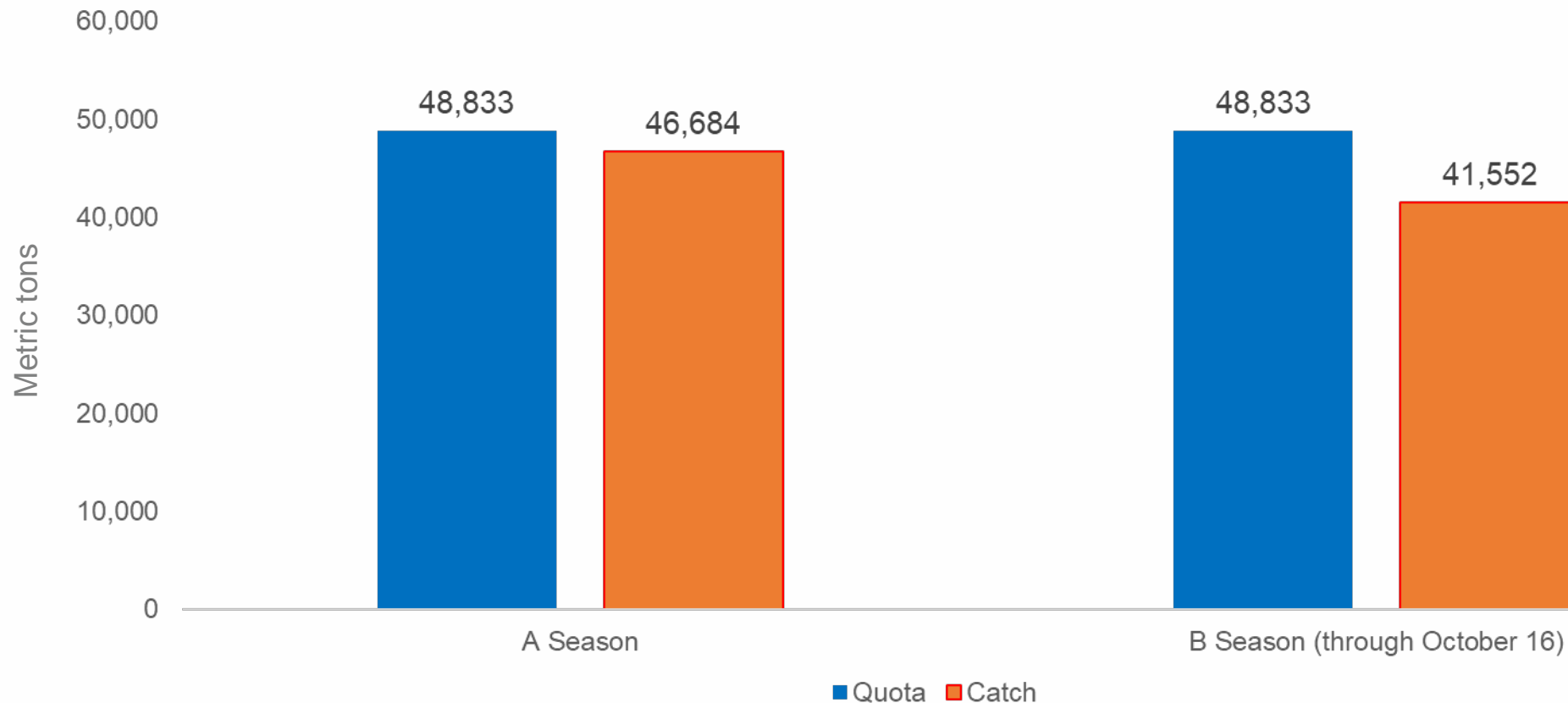


Source: NOAA

■ Gulf of Alaska ■ Bering Sea



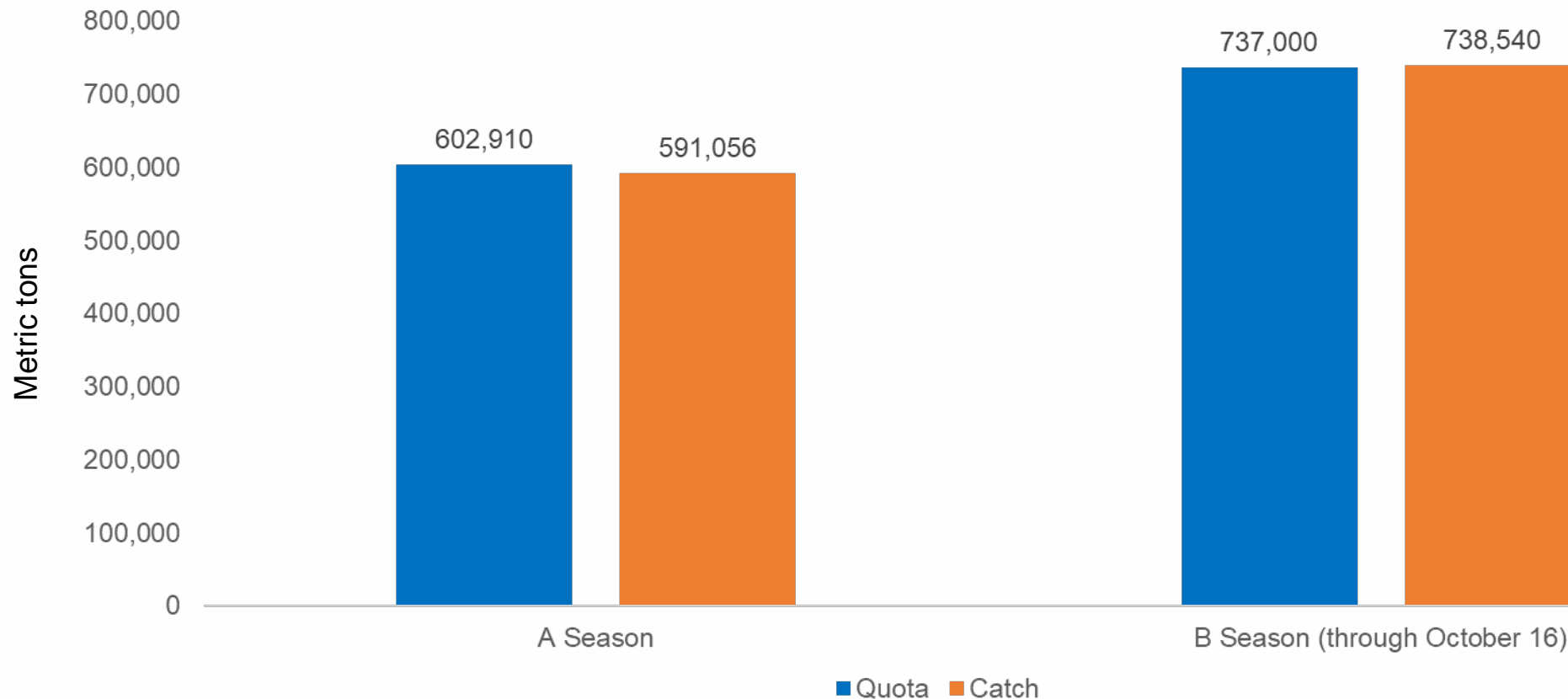
Expect GOA quota in second half of 2021 will largely be harvested



Source: NOAA



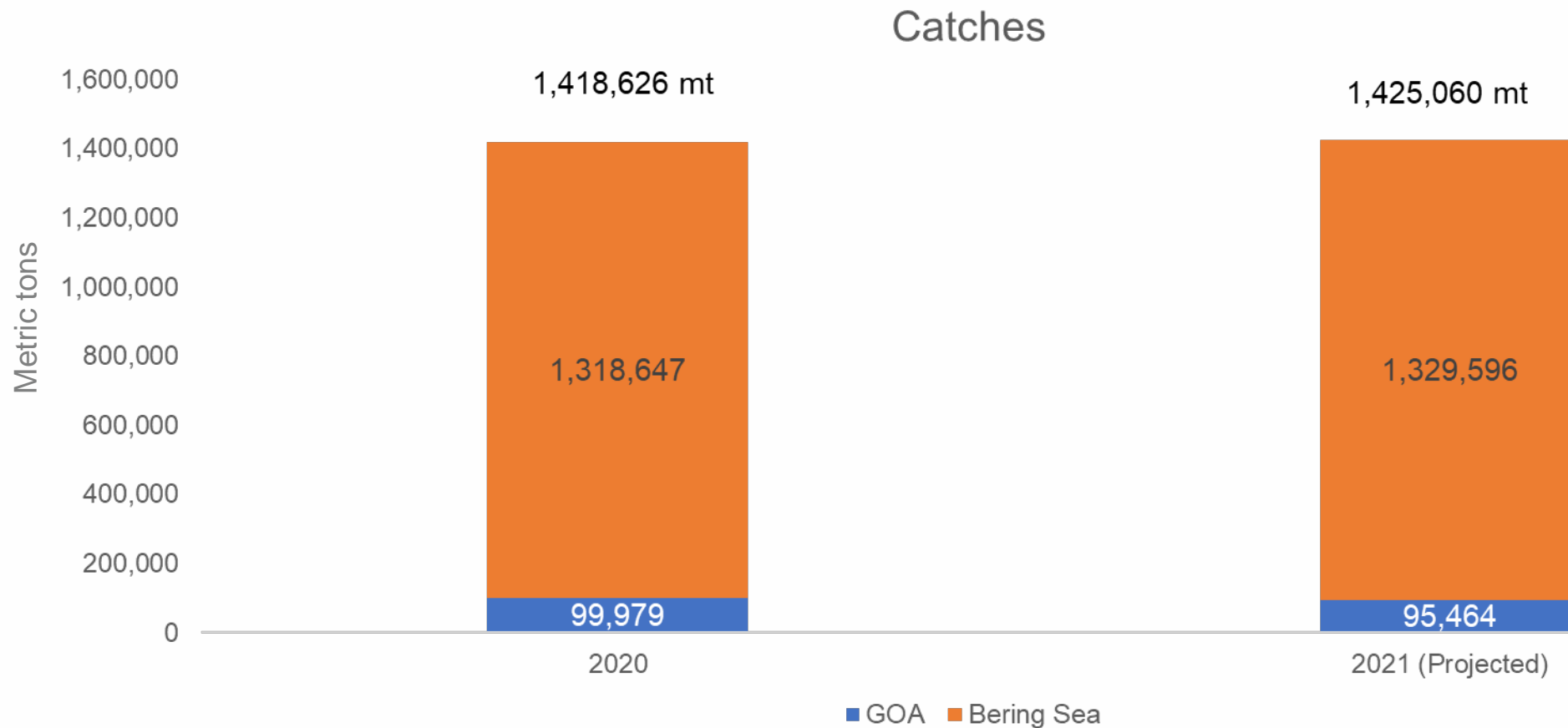
In Bering Sea, A season catch fell 11,000 mt short of quota,
1,540 of that shortfall made up in B season



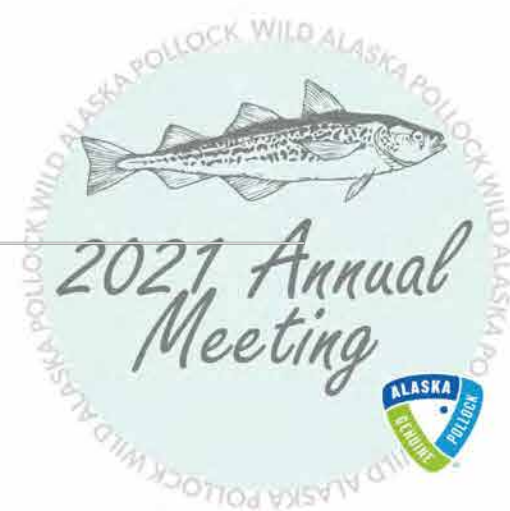
Source: NOAA



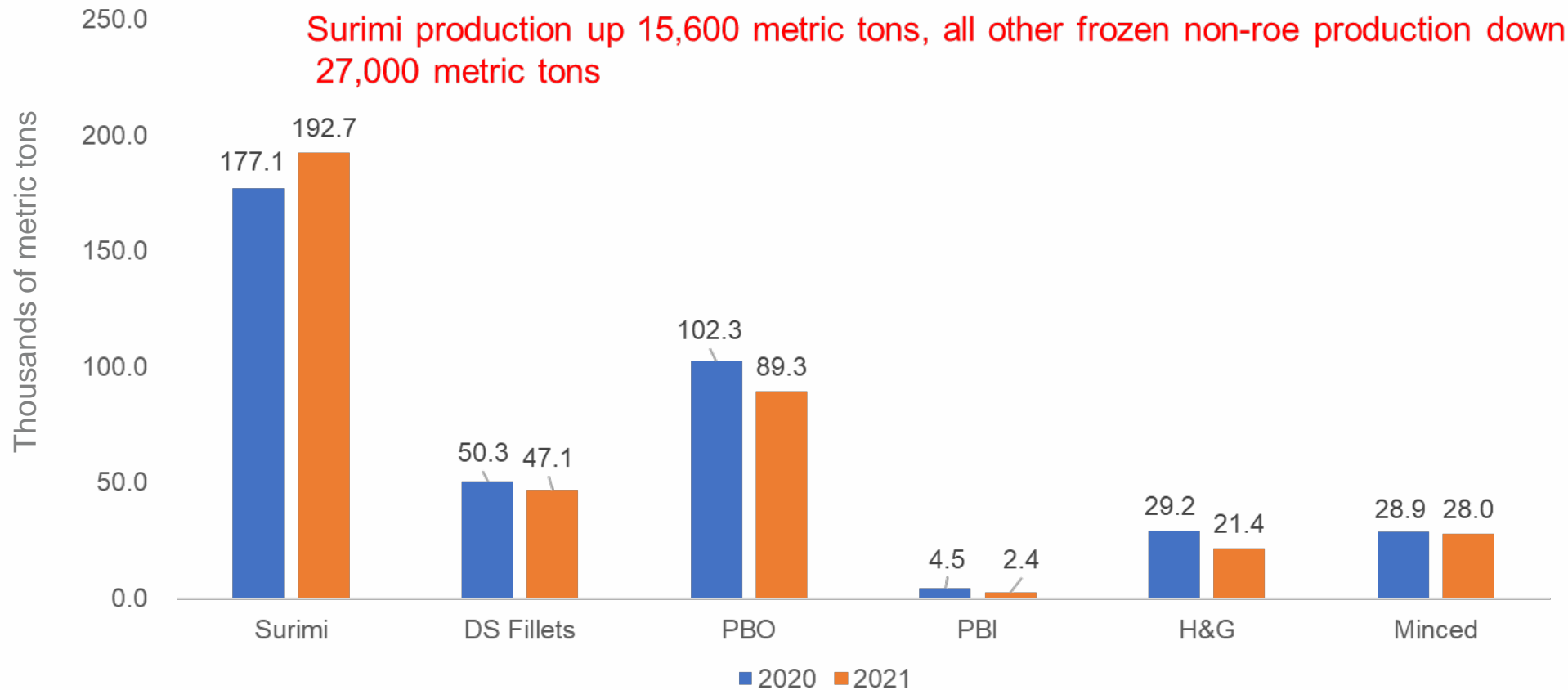
Despite the 52,000 mt reduction in quotas, catches are projected to be up just over 6,400 mt in 2021



Source: NOAA



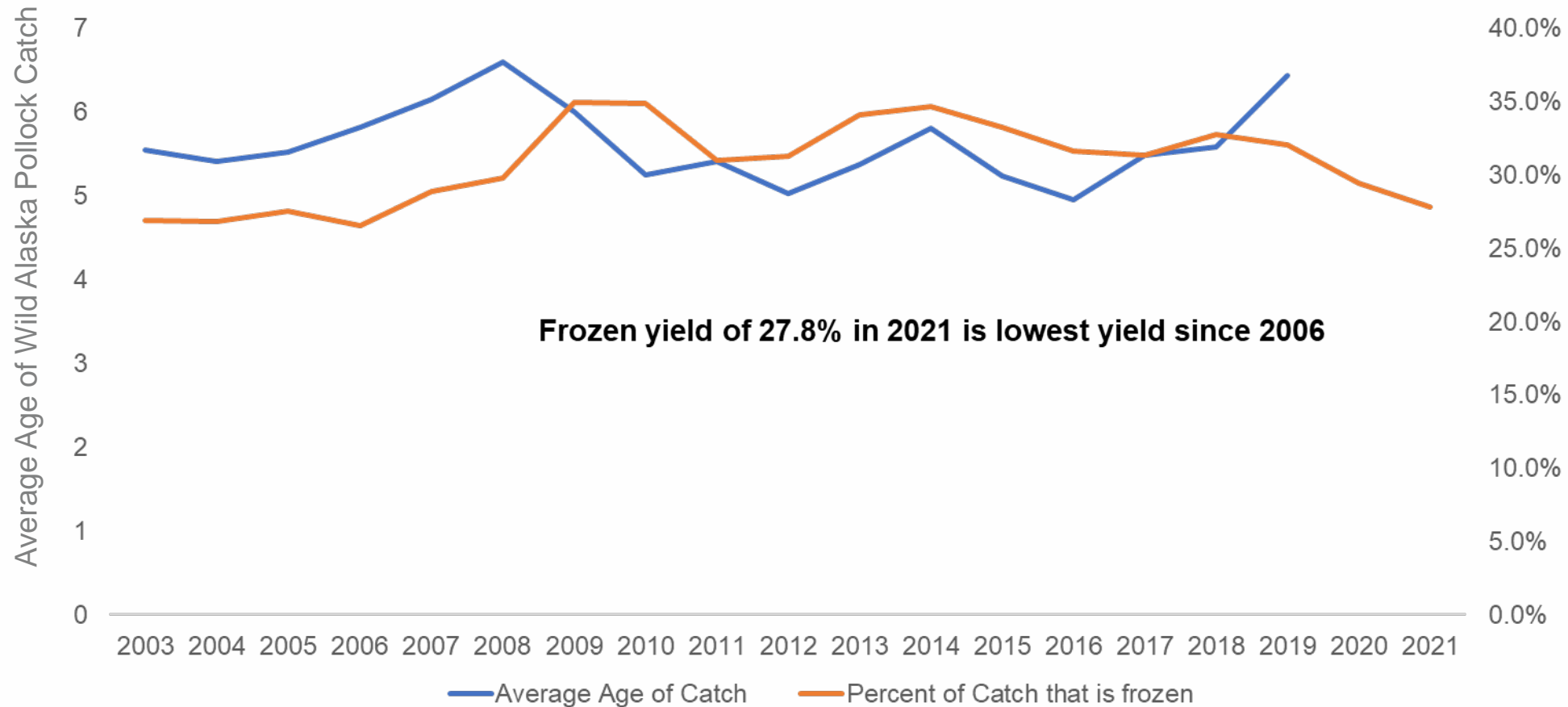
Despite the higher catch, frozen production (less roe) is projected to decrease by 11,400 mt



Source: NOAA, U.S. Census Bureau



While part of the decline is from drop in higher yield H&G, part is also due likely to smaller fish size in 2021

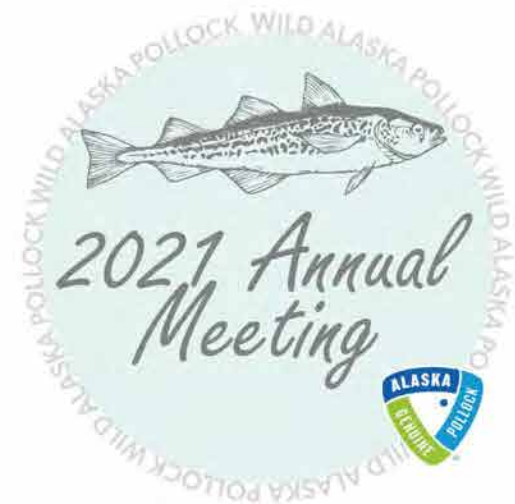


Source: NOAA

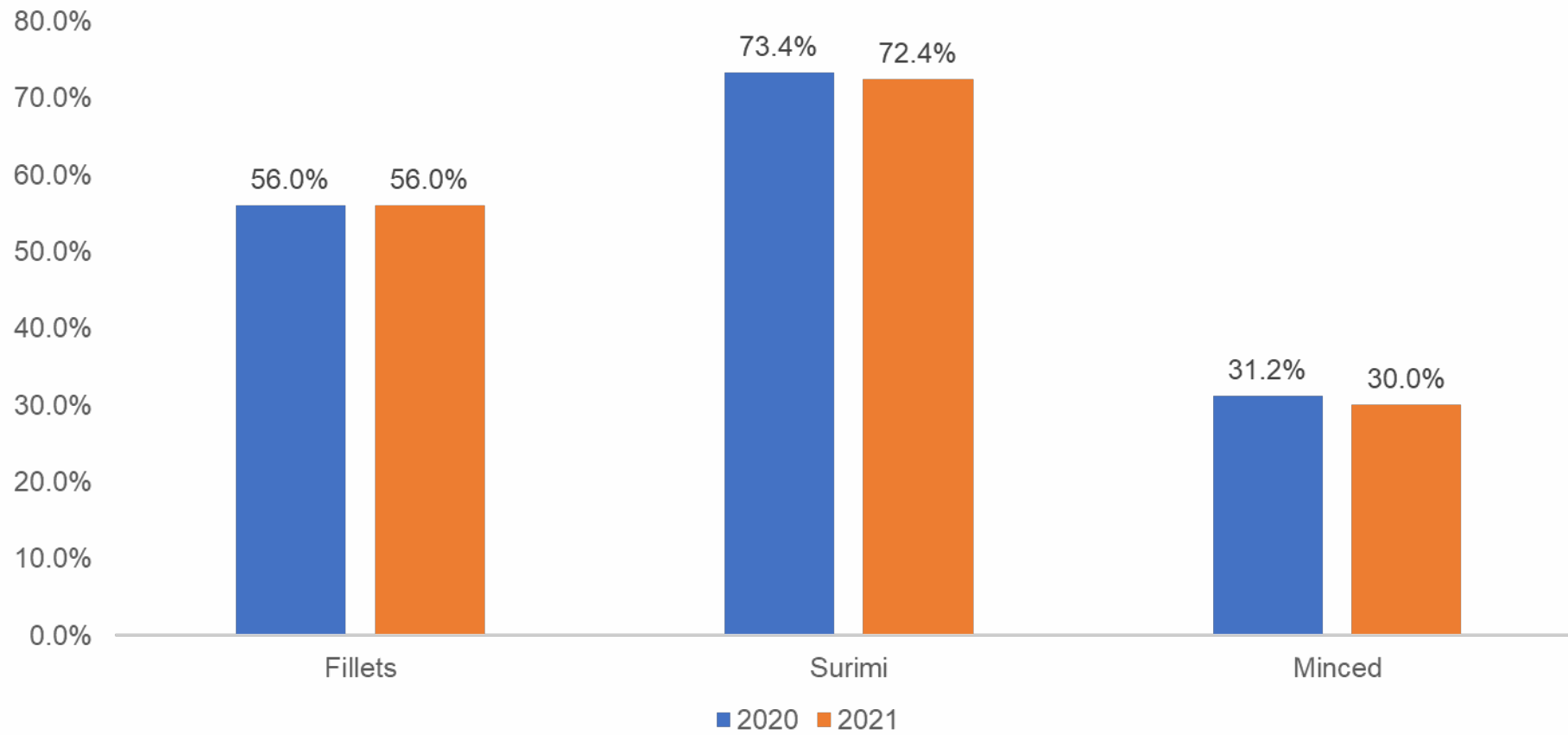


Outlook for 2021 PCC

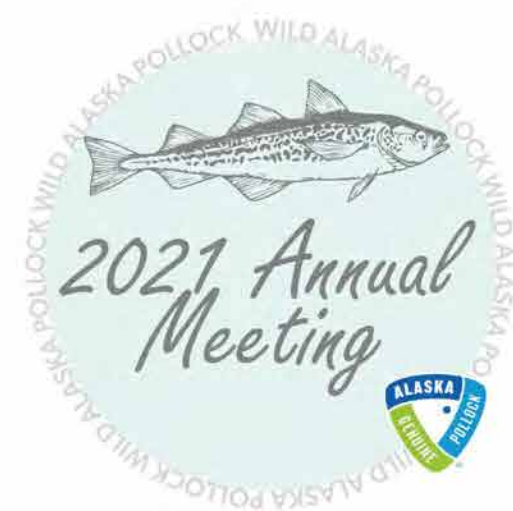
Ongoing supply chain issues due to Covid and the recent Bayside issue make predictions for 2021 challenging



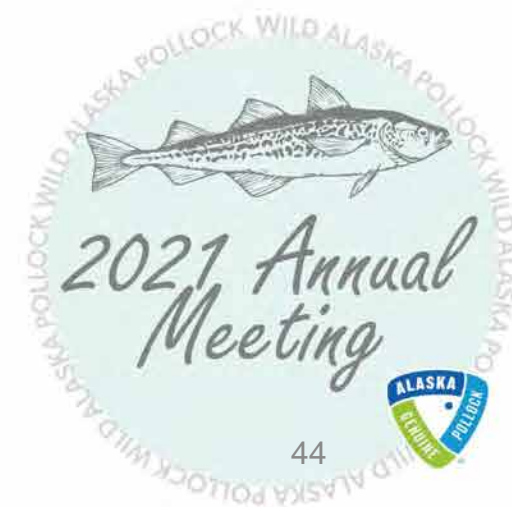
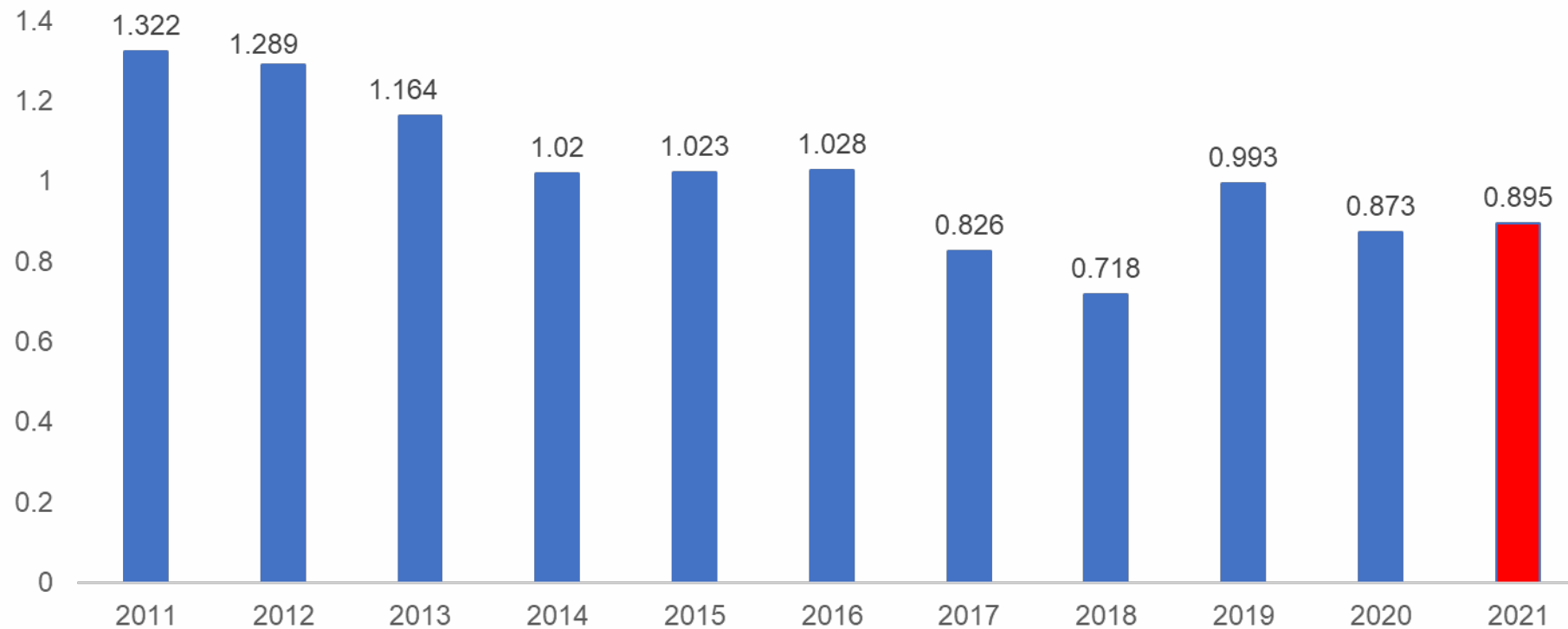
Percentage of production that is exported is relatively unchanged from 2020 to 2021 (through August)



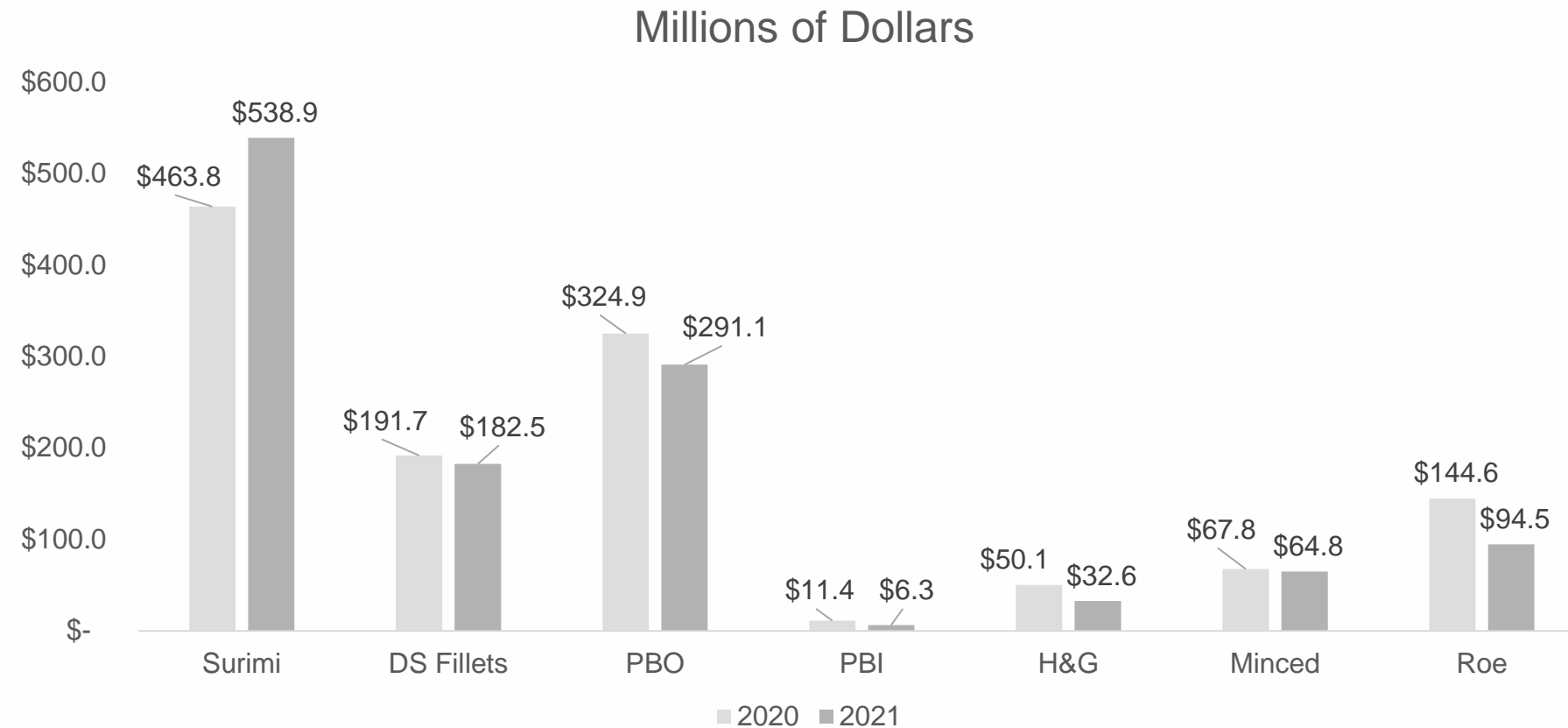
Source: NOAA, US Census Bureau



U.S. Per capita consumption of Pollock/Wild Alaska Pollock is projected to increase slightly for 2021, but depends on percentage of consumption of U.S. surimi being stable



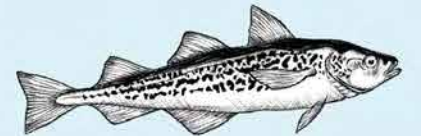
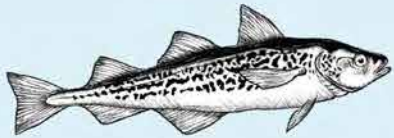
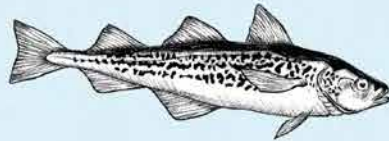
Estimated total value of U.S. frozen production will be down about \$40 Mn from \$1.25 Bn to \$1.21 Bn



Source: NOAA, U.S. Census Bureau



QUESTIONS?



Thank you to our Gold Level General Sponsor



Wild, Natural & Sustainable®

The Alaska Seafood Marketing Institute (ASMI) is Alaska's official seafood marketing arm. It maximizes the economic value of the Alaska seafood resource and works closely to help amplify GAPP's mission, too!



Thank you to our Bronze Level General Sponsor



PARKER | SMITH | FEEK

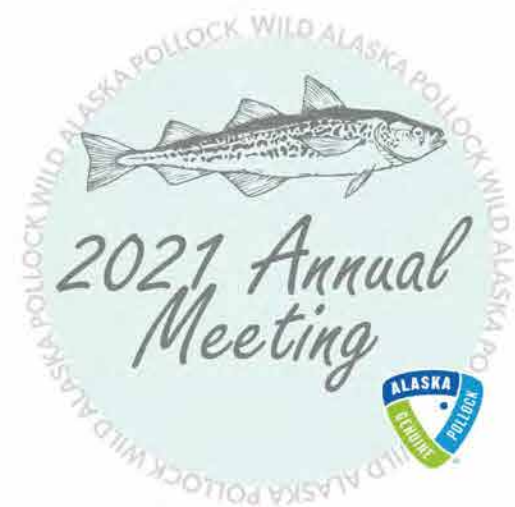
Parker, Smith & Feek is a private brokerage firm that helps serve much of the Wild Alaska Pollock industry.





Richard Edelman
*Chief Executive Officer of
Edelman*

COVID-19 Trends that are Here to Stay and Trust





Growth Starts on a Foundation of Trust

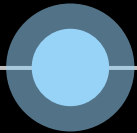
WHY TRUST MATTERS?

Trusted companies are better prepared against risk, more resilient in the face of crisis, and better equipped to unlock the full potential of their **corporate**, **consumer** and **employer** brand across all their audiences.

7 Key Insights

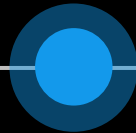
Trusted companies have **stronger consumer buyers and advocates**

01 Customers



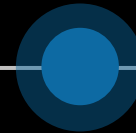
Trusted companies have **greater license to operate**

03 Regulators



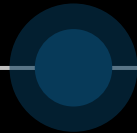
Trusted companies are **more resilient in the face of crisis**

05 Resilience against risk



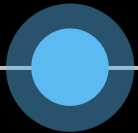
Trusted companies are **more immune to the media cycle**

07 Media Coverage



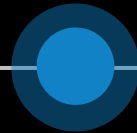
02 Employees

Trust **drives workplace recommendations**



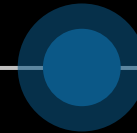
04 Investors

Trusted companies are **more likely to receive institutional investment**

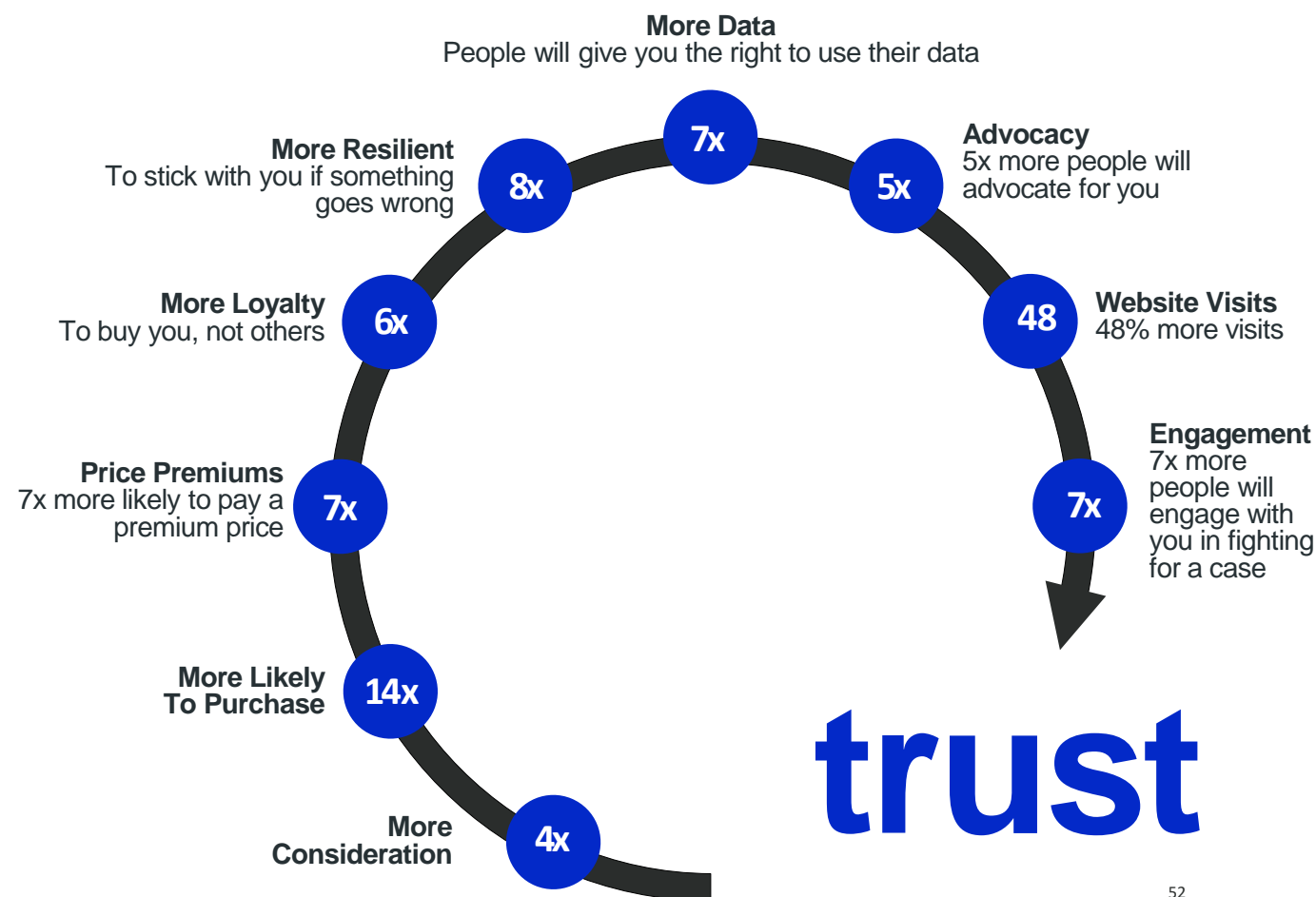


06 The Market

Trusted companies **outperform their respective sectors**



TRUST IS MORE IMPORTANT THAN EVER BEFORE. IT INSPIRES CHANGE AND DRIVES GROWTH.



A black and white photograph showing a close-up of hands sharing food. One hand is holding a round bowl filled with various food items, including what looks like bread, vegetables, and possibly meat. Another hand is reaching into the bowl. In the foreground, there are two glasses, one partially filled with a liquid. The background is blurred, showing more people and food, suggesting a communal meal or a social gathering. The overall mood is warm and communal.

**TRUST IS FUNDAMENTAL.
IT IS ALSO IN VERY SHORT
SUPPLY.**



↑ PANDEMIC PUTS TRUST TO THE TEST ↓

21st ANNUAL EDELMAN TRUST BAROMETER

Methodology



Online survey in 28 countries*

33,000+ respondents

2021 Edelman Trust Barometer fieldwork
conducted from October 19 to November 18, 2020

**The 2021 Trust Barometer 27-market global averages (for the general population, mass population and informed public) do not include Nigeria*

27-market global data margin of error: General population +/- 0.6% (N=31,050); informed public +/- 1.3% (N=6,000); mass population +/- 0.6% (N=25,050+); half-sample global general online population +/- 0.8% (N=15,525).

Country-specific data margin of error: General population +/- 2.9% (N=1,150); informed public +/- 6.9% (N=min 200, varies by country), except for China and U.S. +/- 4.4% (N=500) and Nigeria +/- 9.8% (N=100); mass population +/- 3.0% to 3.6% (N=min 736, varies by country), except for Nigeria +/- 2.9% (N=1,125).

U.S. Post-Election Supplement margin of error: +/- 2.5% (N=1,500).

U.S. Post-Election Supplement ethnicity-specific data margin of error: Non-Hispanic White +/- 3.3% (N=894); all others +/- 4.0 (N=607).

General Online Population

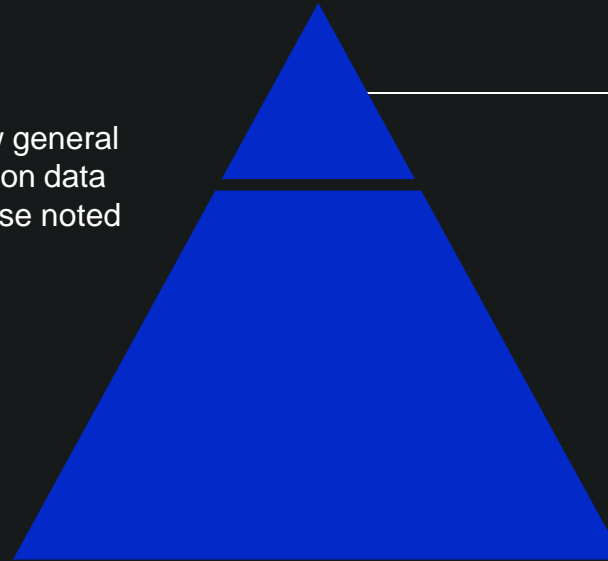
1,150

respondents per country

Ages

18+

All slides show general
online population data
unless otherwise noted



Informed Public

500 respondents in U.S. and China;
100 respondents in Nigeria;
200 in all other countries

Represents **17%** of total global population

Must meet 4 criteria:

- ▶ Age **25-64**
- ▶ College-educated
- ▶ In top **25%** of household income per age group in each country
- ▶ Report significant engagement in public policy and business news

Mass Population

All population not including
informed public

Represents **83%** of total global
population

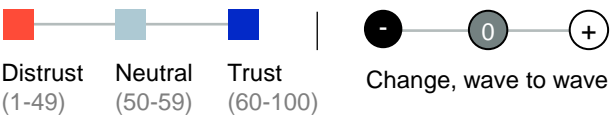


U.S. Post-Election Supplement

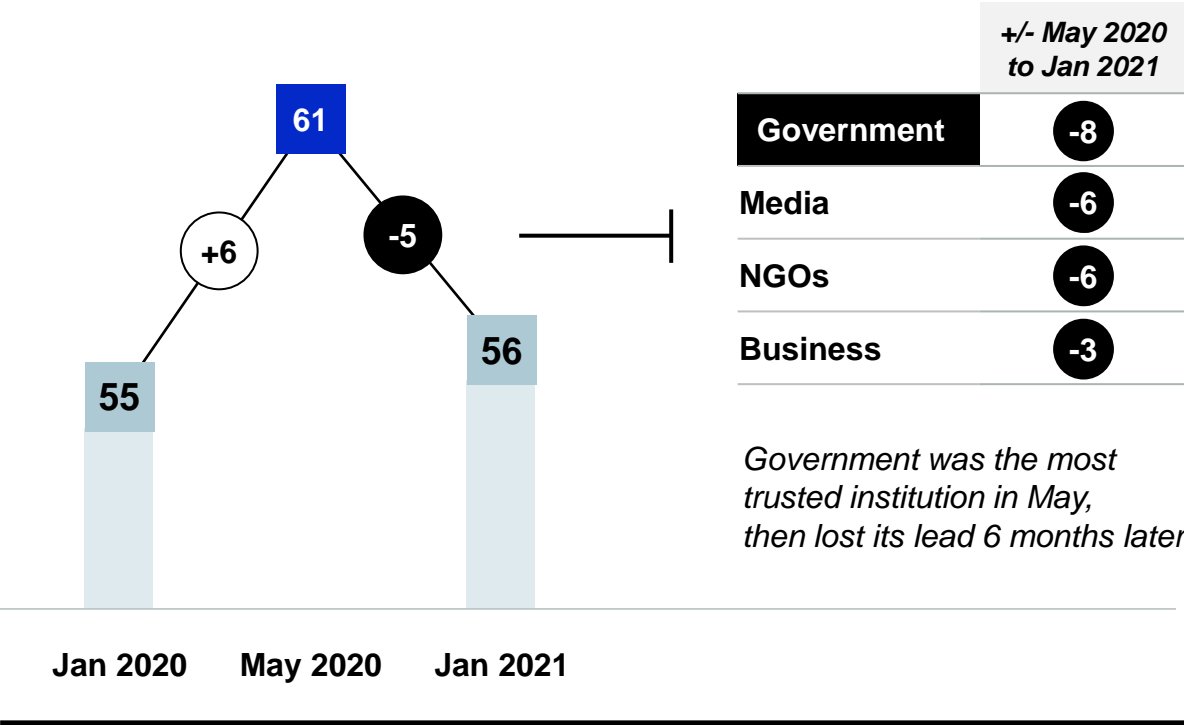
1,500 U.S. respondents, fielded December 14 to 18, 2020

SPRING TRUST BUBBLE BURSTS; BIGGEST LOSS FOR GOVERNMENT

Trust Index, 11 countries included in the 2020 Trust Barometer Spring Update



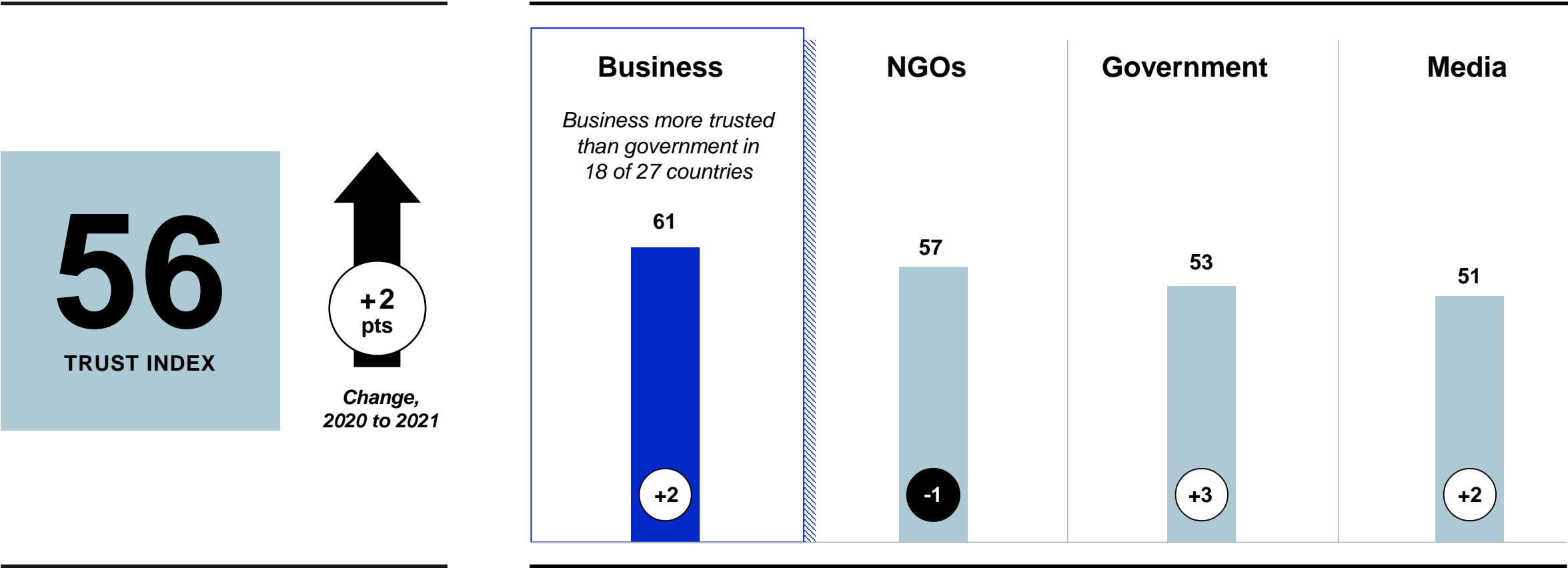
Global 11



Government	+/- Jan 2020 to May 2020	+/- May 2020 to Jan 2021
S. Korea	+16	-17
UK	+24	-15
China	+5	-13
Mexico	+12	-12
Canada	+20	-11
India	+6	-8
U.S.	+9	-6
Germany	+19	-5
Japan	-5	-1
Saudi Arabia	+5	-1
France	+13	+2

BUSINESS BECOMES ONLY TRUSTED INSTITUTION

Percent trust



A TRUST RECKONING FOR CHINA AND THE U.S.

Trust Index



Greatest decline in China (-10);
greatest increase in Australia (+12)

16 countries gained trust,
9 countries lost trust

2021 Edelman Trust Barometer. The Trust Index is the average percent trust in NGOs, business, government and media. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, 27-mkt avg.

2020 General population

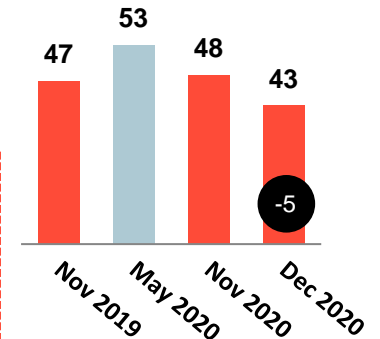
54	Global 27
82	China
79	India
73	Indonesia
66	Thailand
65	UAE
62	Mexico
62	Singapore
61	Saudi Arabia
60	Malaysia
57	Kenya
57	The Netherlands
53	Canada
53	Colombia
51	Brazil
50	S. Korea
49	Argentina
49	Italy
47	Australia
47	U.S.
46	Germany
45	France
45	Ireland
45	Spain
44	S. Africa
42	Japan
42	UK
30	Russia

2021 General population | YtY Change

56	Global 27	+2
77	India	-2
72	China	-10
72	Indonesia	-1
69	Saudi Arabia	+8
68	Singapore	+6
67	UAE	+2
66	Malaysia	+6
63	The Netherlands	+6
61	Thailand	-5
59	Australia	+12
59	Kenya	+2
59	Mexico	-3
56	Canada	+3
53	Germany	+7
52	Italy	+3
51	Brazil	0
50	Ireland	+5
48	Colombia	-5
48	France	+3
48	S. Africa	+4
48	U.S.	+1
47	Argentina	-2
47	S. Korea	-3
45	Spain	0
45	UK	+3
40	Japan	-2
31	Russia	+1

Record year-over-year decline in China's Trust Index

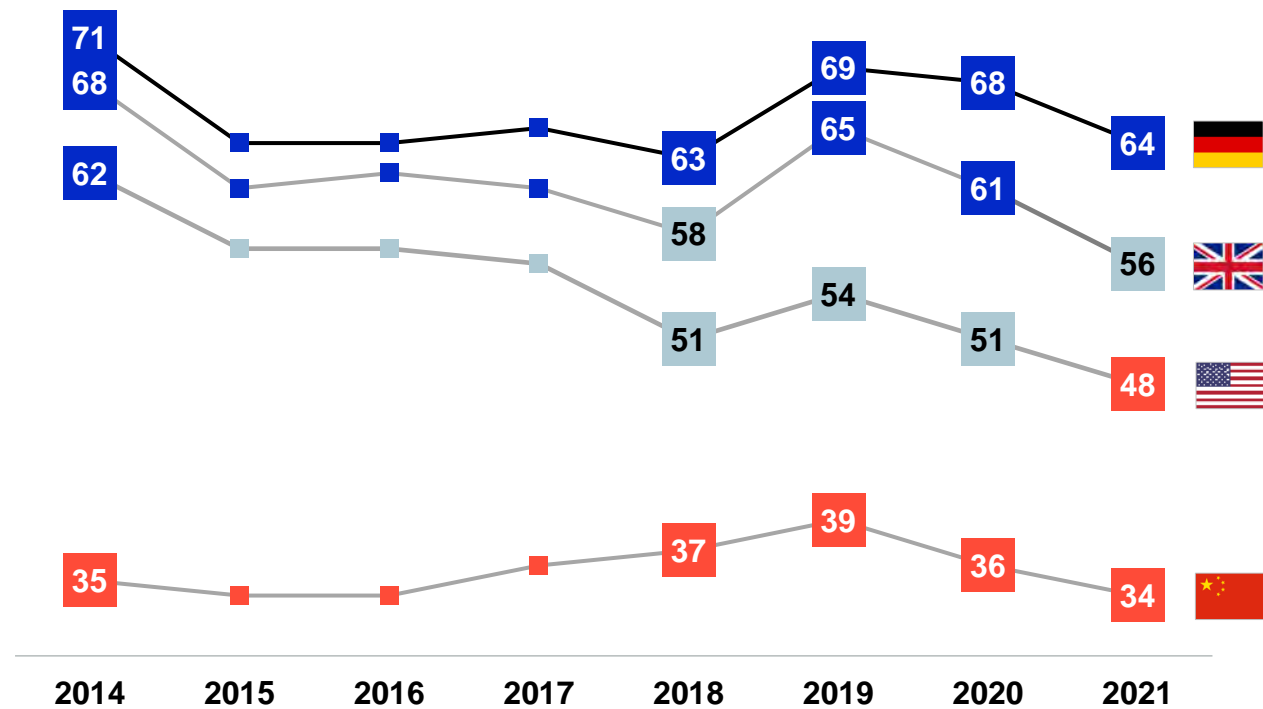
U.S. Trust Index



MOST POWERFUL COUNTRIES LOSE TRUST CAPITAL

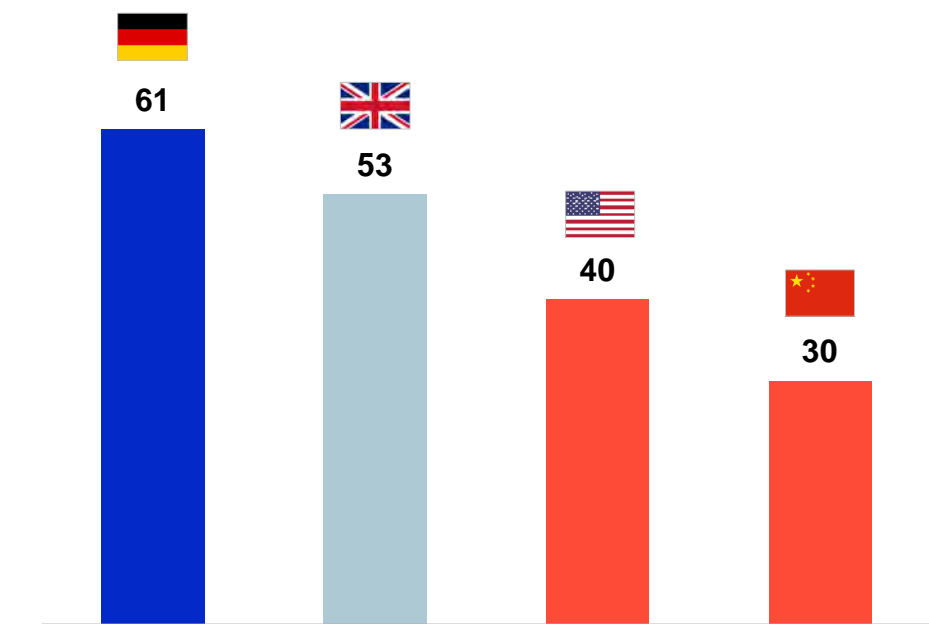
Percent trust in **companies** headquartered in each country

Global 22



Percent trust in the **national government** of each foreign country

Global 27

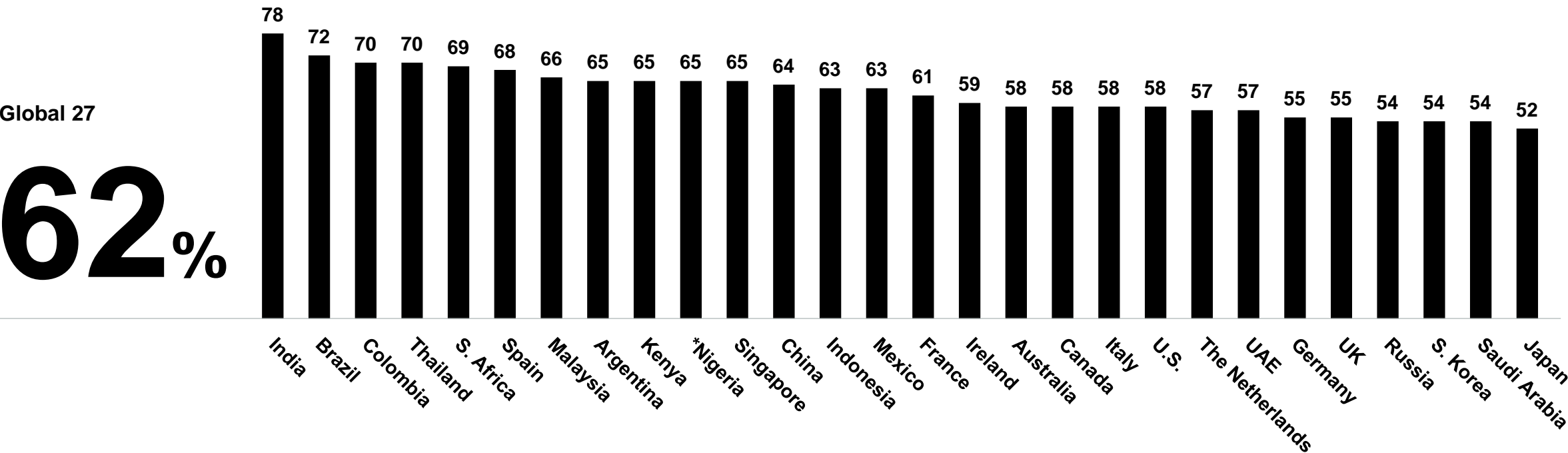


2021 Edelman Trust Barometer. TRU_NAT. Now we would like to focus on global companies headquartered in specific countries. Please indicate how much you trust global companies headquartered in the following countries to do what is right. 9-point scale; top 4 box, trust. Question asked of half of the sample. General population, 22-mkt avg. TRU_GOV. Please indicate how much you trust the national government of each of the following countries to do what is right using a 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. 9-point scale; top 4 box, trust. Question asked of half of the sample. Respondents were not asked to rate their home country. General population, 27-mkt avg.

PANDEMIC DEEPENS INEQUITIES AROUND THE WORLD

Percent who agree

Those with **less education, less money and fewer resources are being unfairly burdened** with most of the suffering, risk of illness, and need to sacrifice due to the pandemic



2021 Edelman Trust Barometer. CV1_Q3. Please indicate your level of agreement with the statements below using a nine-point scale where one means “strongly disagree” and nine means “strongly agree”. 9-point scale; top 4 box, agree. Question asked of half of the sample. General population, 27-mkt avg.
*Nigeria not included in the global average

INCREASED URGENCY TO ADDRESS FOUNDATIONAL PROBLEMS

Change in importance since last year
(more important minus less important)

2021 Edelman Trust Barometer. IMP_POL_PRIORITIES. For each of the following issues and challenges, please indicate whether our country addressing it has become more important to you, less important to you, or has stayed the same in importance, since last year. 5-point scale; top 2 box; more important; bottom 2 box, less important. General population, 27-mkt avg. Net change is the difference between more and less important.

<i>Change in importance since last year</i>	Net change	<i>More Important</i>	<i>Less Important</i>
Improving our healthcare system	+62	70	8
Addressing poverty in this country	+53	62	9
Improving our education system	+53	62	9
Addressing climate change	+51	61	10
Finding ways to combat fake news	+50	60	10
Protecting people's individual freedoms	+50	59	9
Closing the economic and social divide	+48	58	10
Addressing discrimination and racism	+42	53	11

┐

THE FOOD & BEVERAGE SECTOR REMAINS ON SHAKY GROUND

└

THE PAST YEAR INVITED AN INTENSE DIALOGUE ON THE FOOD SYSTEM.

The
Economist

The Intelligence

“The risk of hunger remains—not for lack of food, but for lack of money”—covid-19 and food supplies

Also on the daily podcast: how the pandemic complicates crucial economic data and notes of caution for support-act bands



The Washington Post

Climate Curious

A third of all food in the U.S. gets wasted. Fixing that could help fight climate change.

The
Guardian

Risk of global food shortages due to Covid has increased, says UN envoy

VICE World News

‘If You Want Work, You Keep Quiet’: Fast Food Workers on the COVID Frontline

THE STRAITS TIMES

The View From Asia

Don't let Asia starve

FOLHA DE S.PAULO

ENGLISH VERSION

Deforestation in the Amazon Breaks Record and Grows 9.5% from 2019 to 2020

CNN

• PERSPECTIVES •

4 steps we must take to fix the world's broken food system

THE SEAFOOD CONVERSATION ACROSS MEDIA HAS CAUSED CONFUSION AND IMPACTED TRUST IN THE INDUSTRY.



Fish sticks, sandwiches could get harder to come by with customs dispute



How Industrial Fishing Creates More CO2 Emissions Than Air Travel



Netflix's 'Seaspiracy' Documentary Unearths the Fishing Industry's Dark Secrets



How 26 Million Pounds of American Fish Got Stuck in Canada



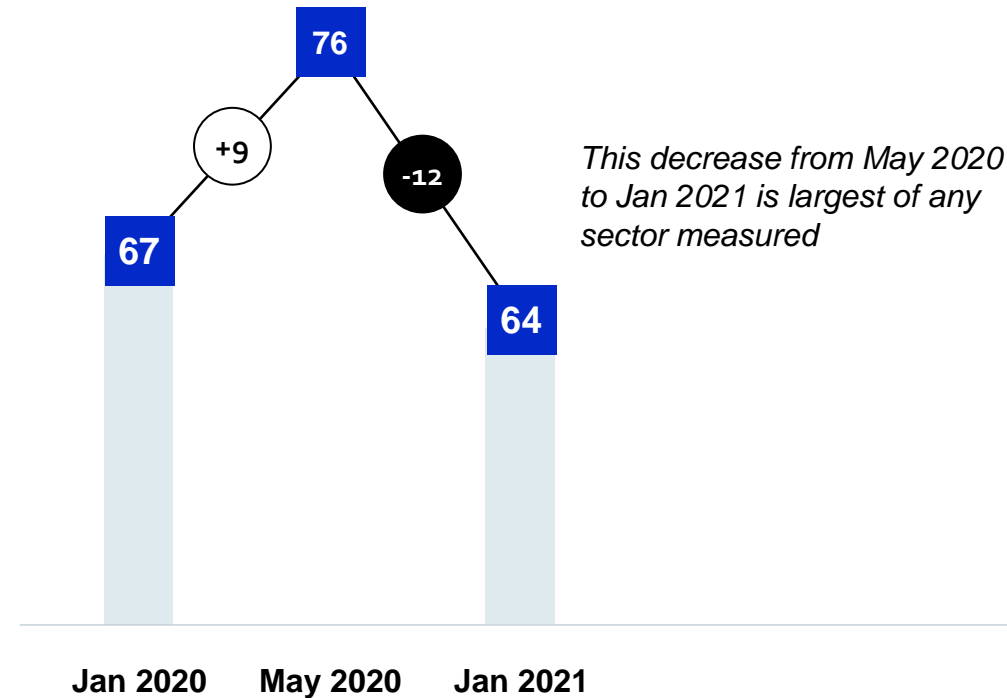
The Continued Fight Over Farming The Oceans



Four Steps We Must Take to Fix the World's Broken Food System

WE EXPERIENCED A DRAMATIC DECLINE IN TRUST ACROSS THE FOOD SECTOR OVER THE LAST YEAR.

Global trust in food and beverage



Countries	+/- Jan 2020 to May 2020	+/- May 2020 to Jan 2021
China	+11	-24
Germany	+18	-18
France	+18	-17
Canada	+11	-15
Mexico	+12	-14
UK	+6	-13
S. Korea	+2	-8
U.S.	+9	-7
Saudi Arabia	+9	-5
India	+3	-4
Japan	-5	-4

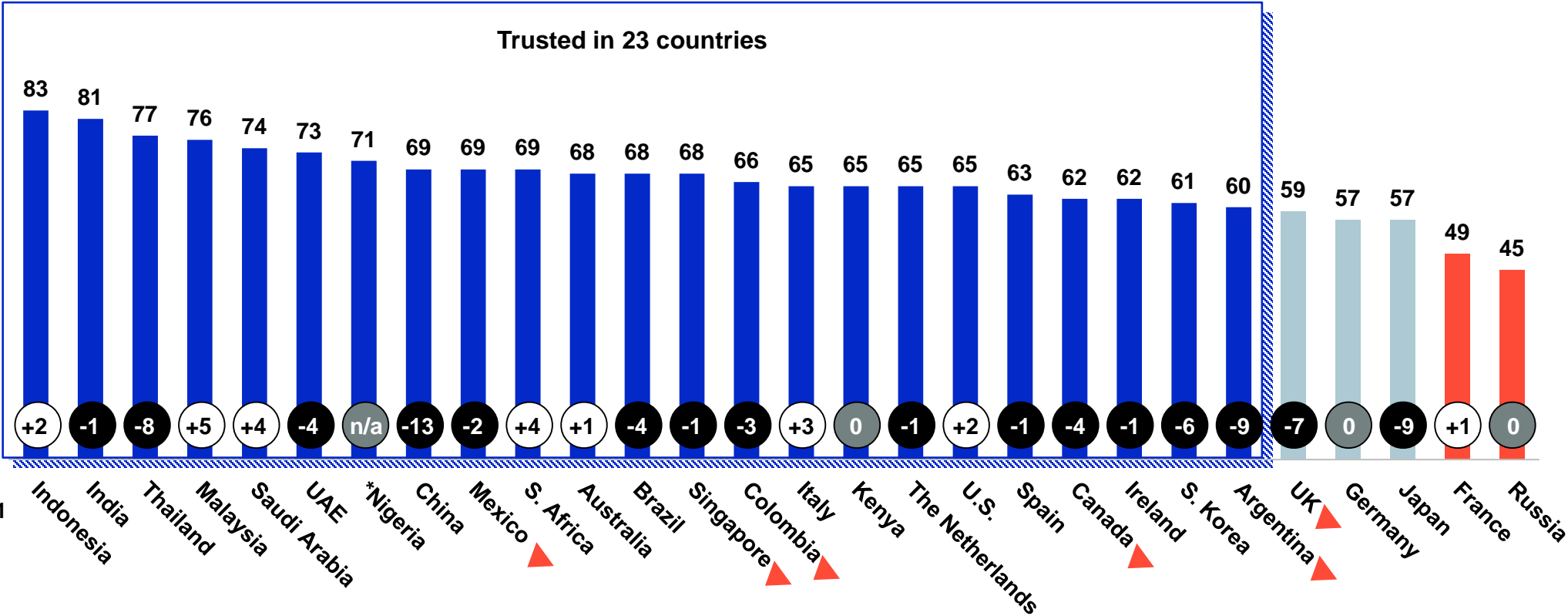
TRUST IN FOOD AND BEVERAGE DECREASES IN 16 OF 27 COUNTRIES

Percent trust

GLOBAL 27
66

-2
pts

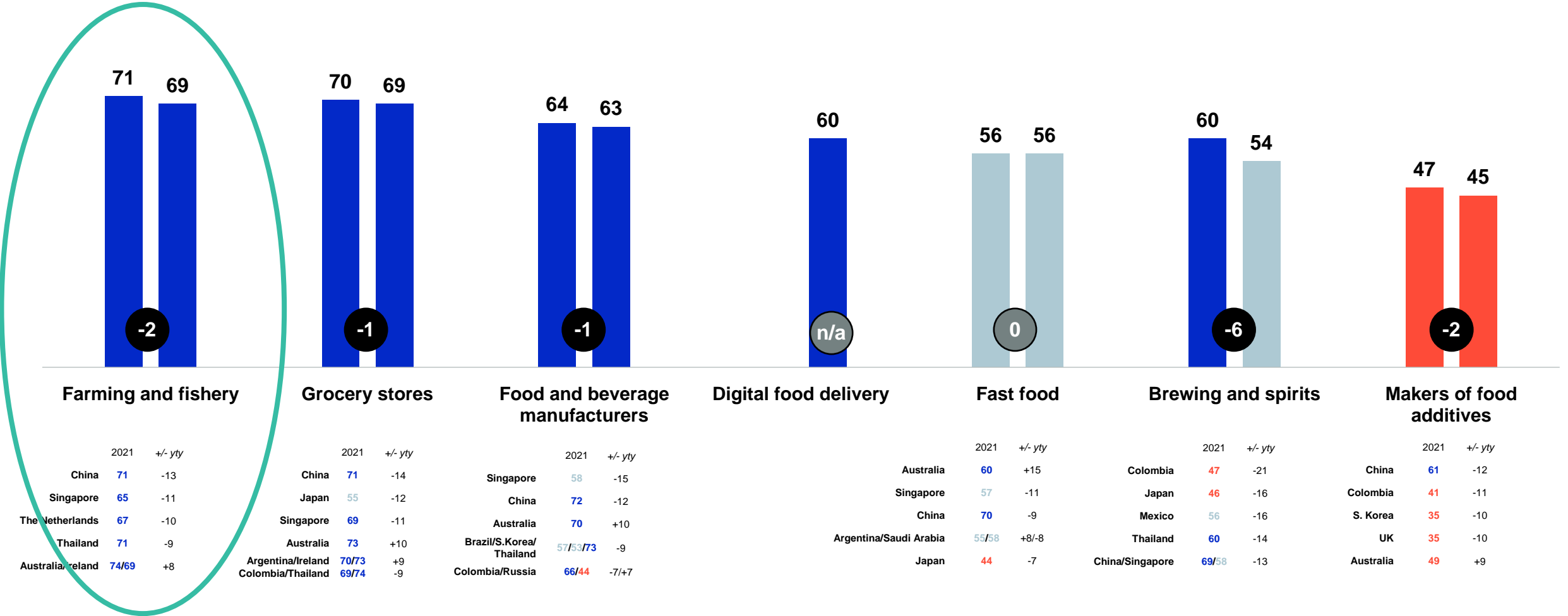
Change,
2020 to 2021



2021 Edelman Trust Barometer. TRU_IND. [FOOD AND BEVERAGE] Please indicate how much you trust businesses in each of the following industries to do what is right. 9-point scale; top 4 box, trust. Industries shown to half of the sample. General population, 27-mkt avg.
*Nigeria not included in the global average

TRUST DECLINES ACROSS SUBSECTORS

Percent trust in food and beverage subsectors





Trust The New Brand Equity



BRAND TRUST MATTERS MORE THAN LOVE

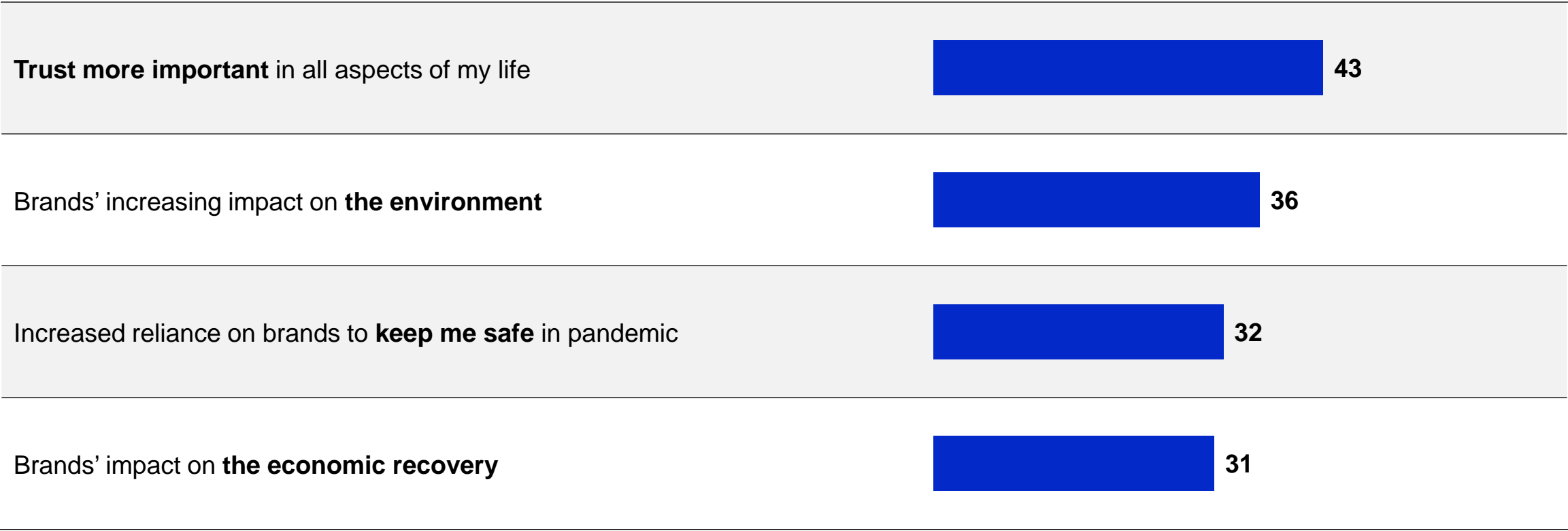
Percent who rate each as critical or important
when deciding which brands to buy or use

	Total importance	Critical deal breaker
It offers a good value for the money	89	36
It offers the best quality	89	33
I trust it	88	32
It offers high quality customer service	85	28
It is convenient to find, buy and use	85	26
It has a good reputation	84	26
I love it	81	26

2021 Edelman Trust Barometer Special Report: Trust, The New Brand Equity. TRUST_IMP. When it comes to brands in general that you will or will not buy or use, categorize each of the following attributes based on whether it is a critical deal breaker, important to have, or merely a nice to have. 3-point scale; code 1, deal breaker; code 2, important. General population, 14-mkt avg. Data on the left is a sum of codes 1 and 2.

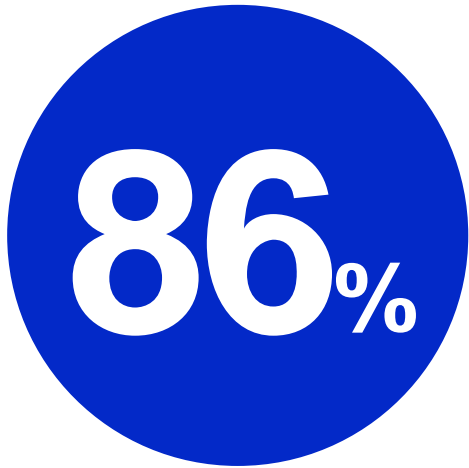
DEEPER DEPENDENCE ON BRANDS INCREASES NEED FOR TRUST

Reasons why it is more important to trust the brands they buy today than in the past



2021 Edelman Trust Barometer Special Report: Trust, The New Brand Equity. IMP_WHY. You just indicated that it is more important to you to be able to trust the brands you buy today than in the past. Among the items listed below, please select those, if any, that best describe why it has become more important to you to be able to trust brands. Pick all that apply. Question asked of those that say it is more important to be able to trust the brands they buy or use today than in the past (IMP_TRU/1). General population, 14-mkt avg.

BRANDS EXPECTED TO ACT BEYOND THEIR BUSINESS



86%

Expect brands to take one or more actions **beyond their product and business**

Actions consumers expect from the brands they buy:

Give money to good causes

Address **societal challenges**

Tell hard truths

Support local communities

Create positive change in society

Display **representative images**

Address **political issues**

Support culture and the arts

Make our culture more accepting

No support for **misinformation**

BRANDS MUST EARN AND TELL THEIR STORY

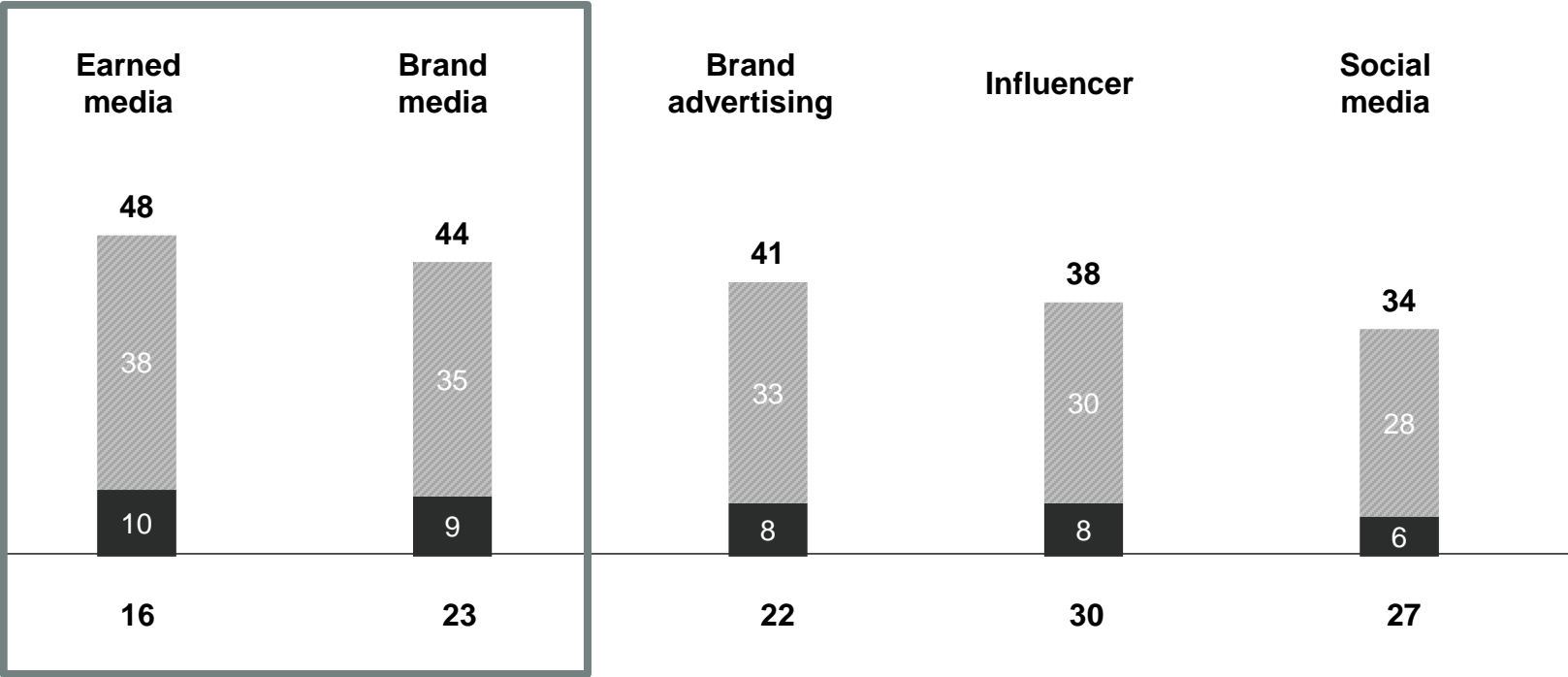
Percent who believe information about a brand from each source, either automatically or after seeing it twice or less

Communications from...

Number of times they need to see the information repeated before believing it:

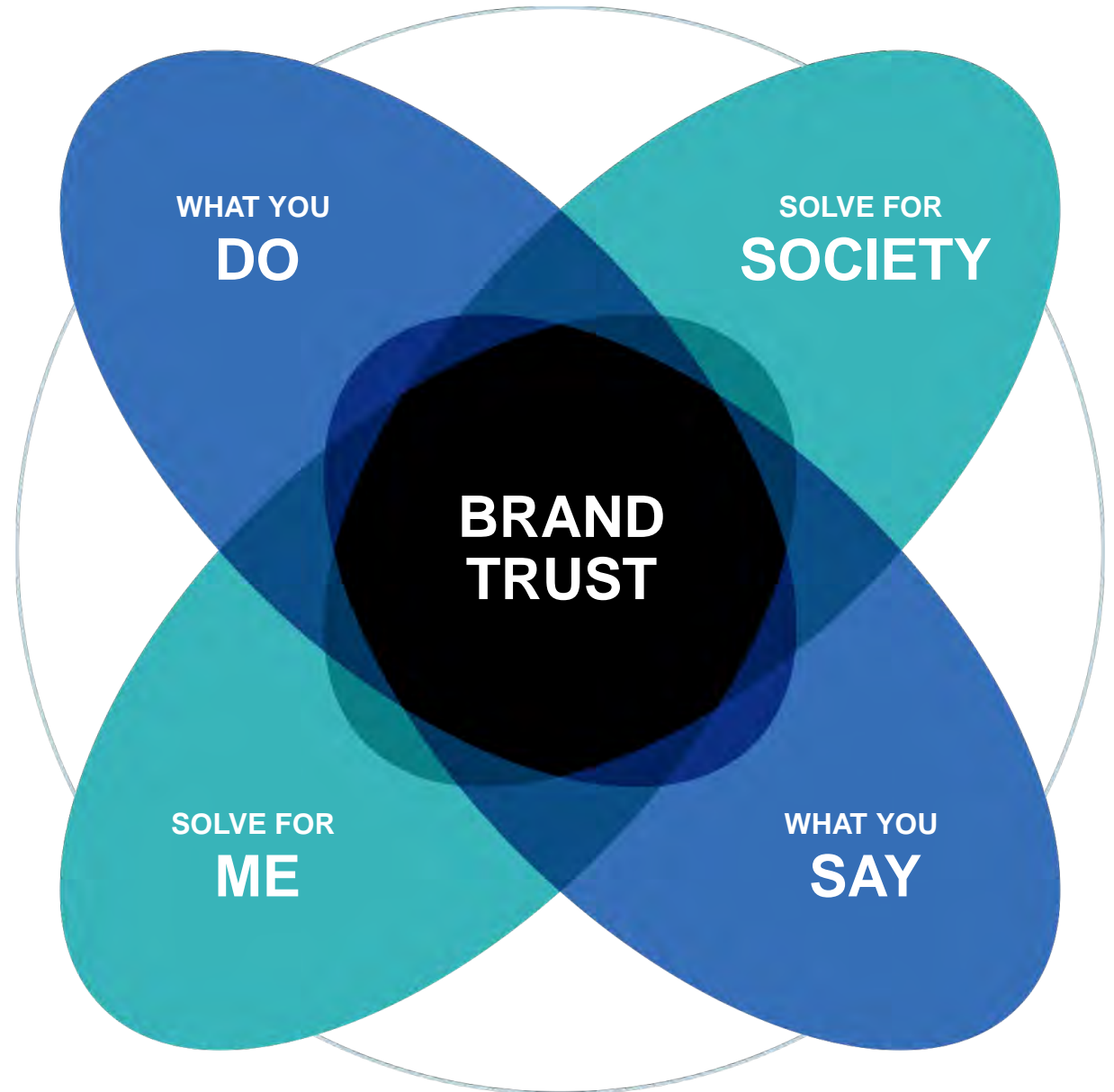
- Once or twice
- If I see it here, I will automatically assume it is true

I will never believe it is true if this is the only place I see it



2021 Edelman Trust Barometer Special Report: Trust, The New Brand Equity. Q9. When you see a new piece of information about a brand in each of the following places, how many times do you need to see it or hear repeated before you believe it is really true? Question asked of half of the sample. "Once or twice" is a net of codes 2 and 3. General population, 14-mkt avg. "Earned media" is an average of attributes 2 and 3. "Brand media" is an average of attributes 5 and 6.

**TRUSTED BRANDS LIVE AT
THE INTERSECTION OF
PERSONAL AND SOCIETAL,
WORDS AND ACTIONS**



└

BUILDING RESILIENCE IN FOOD THROUGH TRUST

└

“

As much as we need new thinking on global food system issues, we also need new doing.”

Danielle Nierenberg,
Food Tank



Fishermen

Processors

Manufacturers

Consumer

VALUE PROPOSITION

5 SYSTEM GAPS HAVE EMERGED

as the key drivers (the root causes) behind the myriad of production, distribution & consumption issues

1

INNOVATION GAP

With cultures driven by quarterly earnings, many companies prioritize *product* innovation over *system* innovation

2

INCLUSION GAP

The communities most in need of system change are underrepresented in production and industry roles.

3

INFORMATION GAP

Food access is often framed in terms of distribution. Yet, people also need tools, transparency and information to make sustainable & nutritious choices.

4

INCENTIVE GAP

We have technology that can lessen environmental impact *now*. Yet, growers operating under tight margins have relatively few incentives to adopt them *now*.

5

INVESTMENT GAP

As investment *dollars* pour into synthetic bio and food tech, little *time* is invested in bringing people into the possibilities.

TRUST IN THE FOOD AND SEAFOOD INDUSTRY IS BUILT ONE PIECE AT A TIME.

1

Take a hard look at where you stand

- Assess trust with all stakeholders in your own company and pinpoint areas of vulnerability
- Analyze each of the food system gaps. What problems can you credibly solve to build trust? Which gaps have the greatest connection with your business goals?

2

Empower employees at every step

- System gaps have connections across business functions. Make sure the entire organization is involved to create meaningful change.
- Ensure employees have ample opportunity to participate and co-create. They should be involved in assessing the gaps AND building your plan of action.

3

Lead with facts, act with empathy

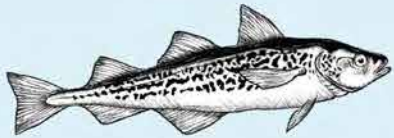
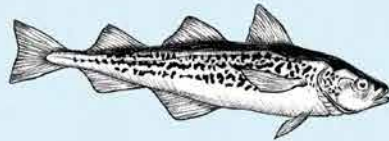
- Ensure every commitment leads with the tangible actions you are taking now and in the future.
- Have the courage to provide straight talk but also empathize and address people's fears.

4

Provide trustworthy, collaborative content

- With actions in place, tell the story of what you're addressing. Remember the cry for truthful, unbiased, reliable information.
- Don't go it alone. Business, government, NGOs and others must find a common purpose and take collective action to solve societal problems. So, engage others along the way.

QUESTIONS?



Thank you to our Gold Level General Sponsor



Global Seas provides advanced, dynamic, and quality vessels to the Wild Alaska Pollock industry and beyond, is a member of GAPP, and lead large sustainability efforts for the industry.



Thank you to our Gold Level General Sponsor



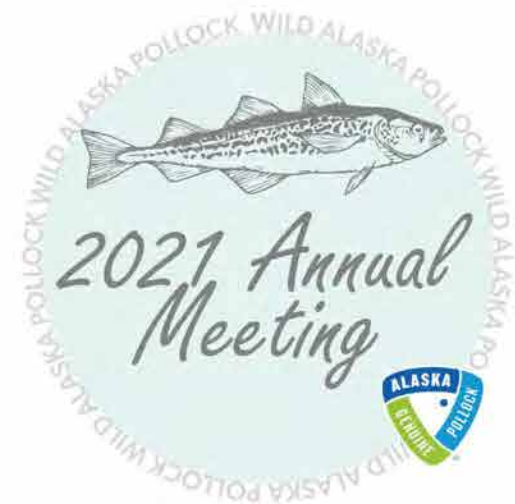
Feeding one billion people around the globe with wild caught, sustainable, and frozen-at-sea products. That's American Seafoods.





Christine Durkin
*Marketing Consultant for
Genuine Alaska Pollock
Producers (GAPP)*

Partnership Panel



Thank you to

GAPP's Previous Partners



Thank you to

GAPP's New Partners



Meet your Panelists



Mike Campanile



Rich Lawrence



Nick Mendoza



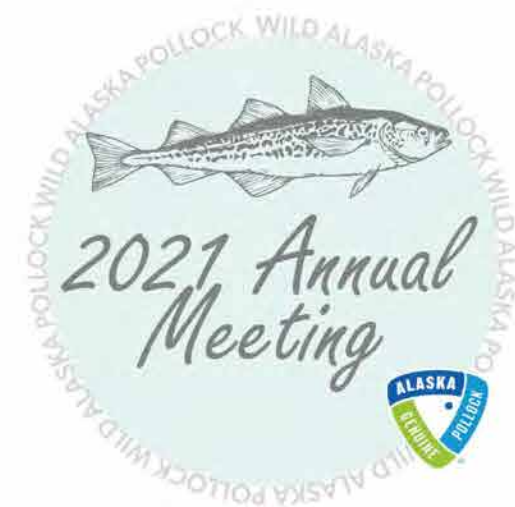
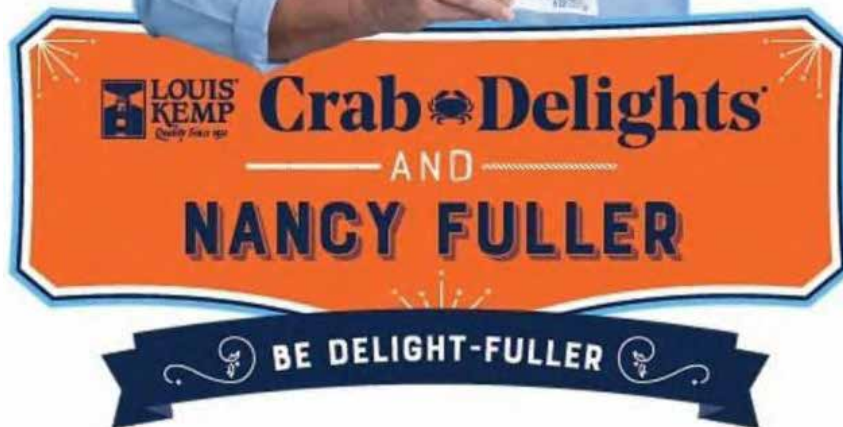
Amin Nabli





Mike Campanile

Sr. Brand Manager Trident Seafood: Louis Kemp





Rich Lawrence

Category, Brand & Innovation Director at New England Seafood- Fish Said Fred

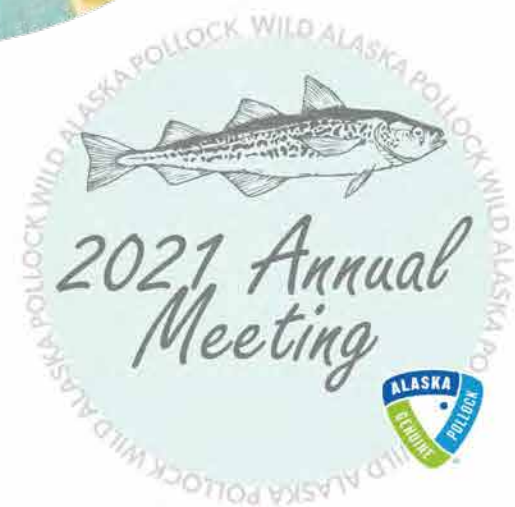


Waitrose





Nick Mendoza
CEO/Founder Neptune Snacks

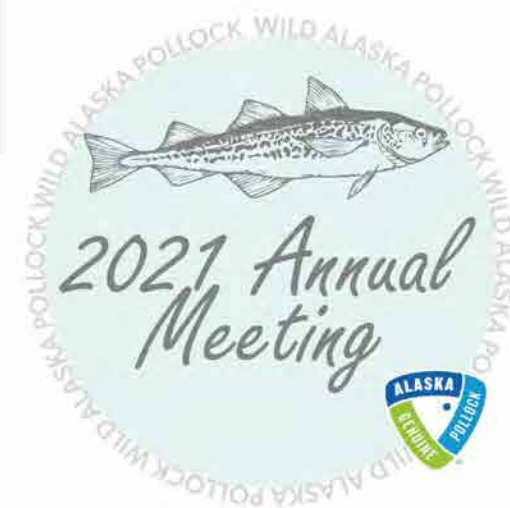


Amin Nabli

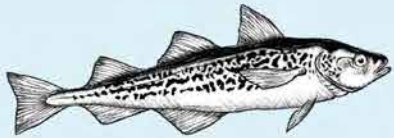
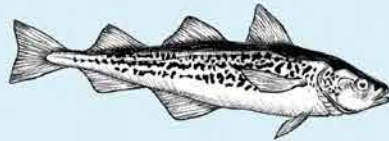
COO, Aquamar Inc.



AQUAMAR
REAL FISH. NEVER IMITATED.



QUESTIONS?

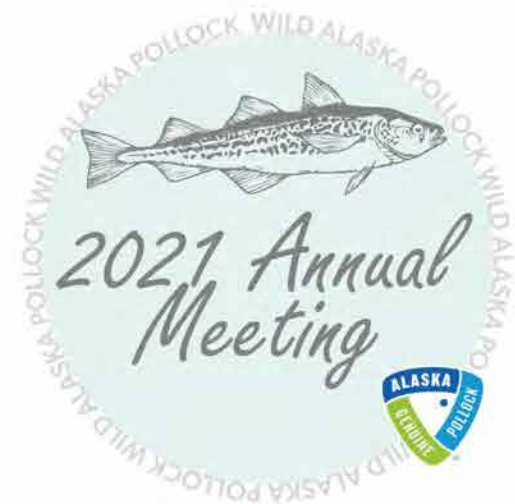


Thank you to our Registration Bag Sponsor



NEPTUNE
Sustainable Ocean Snacks

Neptune is a sustainable fish jerky brand, sourcing only from responsible local fisheries (and serving up delicious Wild Alaska Pollock Citrus Ginger jerky you received in your registration bag!)



Thank you to our Event App Sponsor



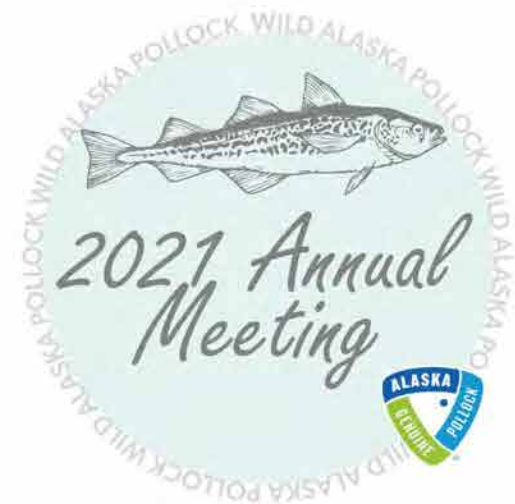
Trans-Ocean offers surimi seafoods to customers throughout the United States and Canada. You can find their products in the refrigerated seafood department at your local food retailer!



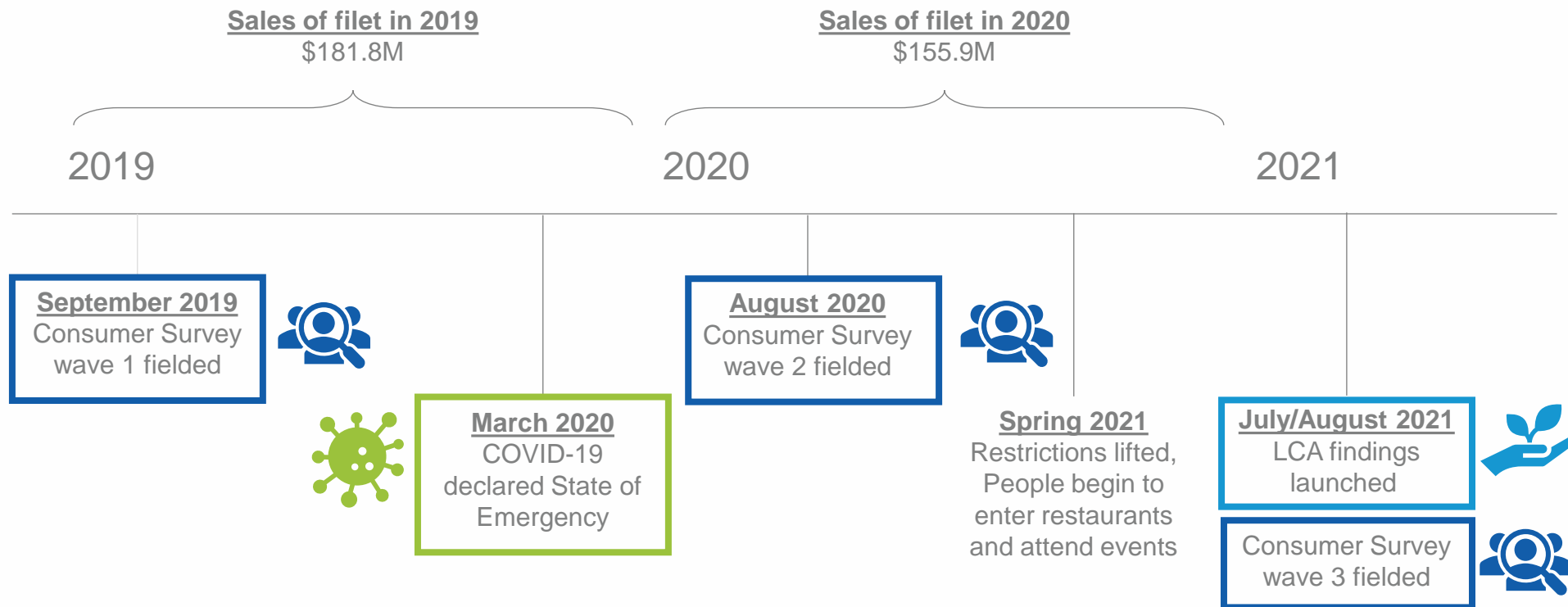
Wild Alaska Pollock Year-Over-Year Research Reveal



Mary Elizabeth Germaine
Partner, Managing Director at Ketchum Analytics

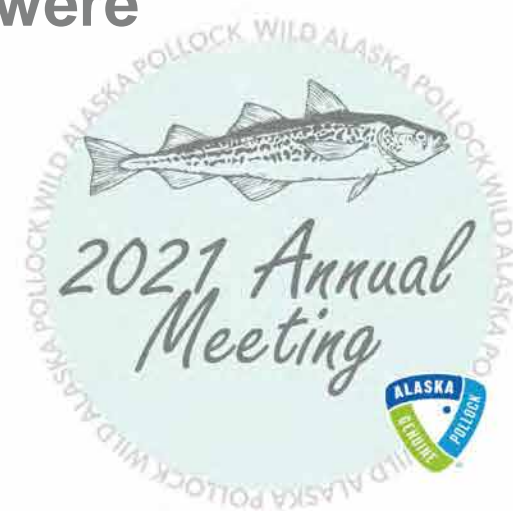


Timeline of events



Methodology

- An **online survey** was fielded in the United States among a nationally-representative sample of adults aged 18 years or older between August 14 - 26, 2021.
- This report reflects findings from the general population (n=1,244), a statistically significant sample to allow for segmentation among gender, age, region, race/ethnicity, education and income.
- In addition to Wild Alaska Pollock, **the following competitors were included in this analysis:**
 - Salmon
 - Cod
 - Tilapia
 - Haddock
 - Sole
 - Pacific Hake / Whiting
 - Halibut
 - Tuna
 - Catfish
 - Rockfish



Tracking Wild Alaska Pollock's performance on core KPIs

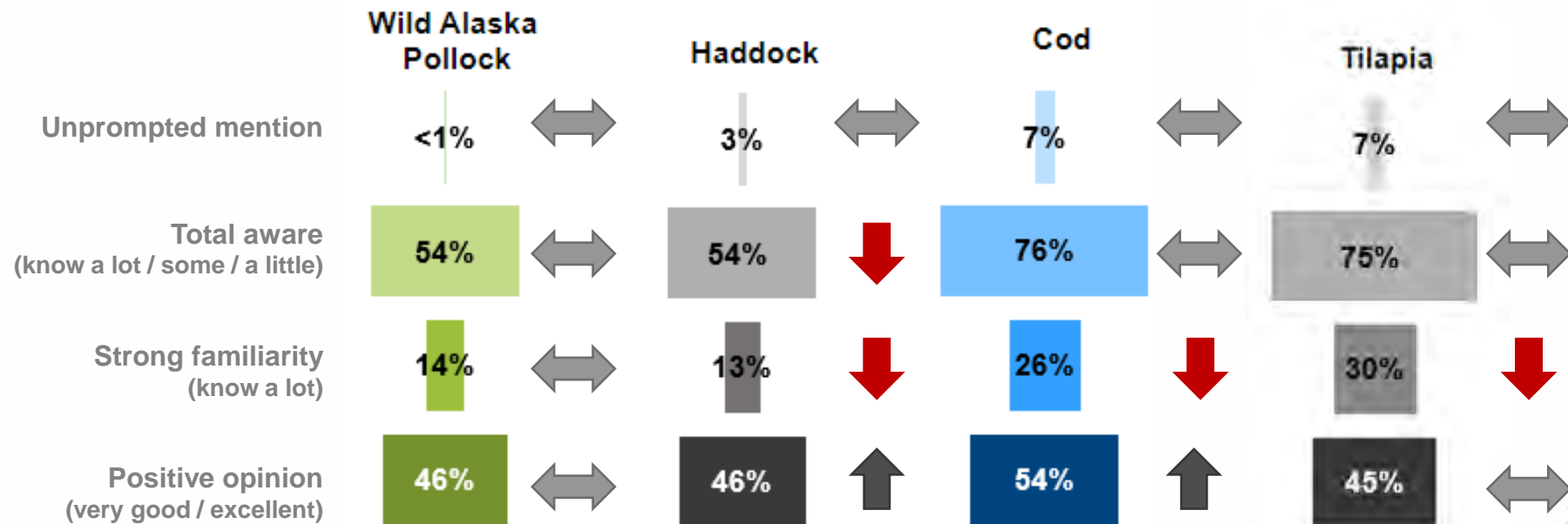
After an increase in familiarity of Wild Alaska Pollock from 2019 to 2020, this metric held steady in 2021. This comes after a year where there was difficulty introducing new products into consumer channels as channels like retail were focused on ensuring a stock of essential items, limiting exposure to Wild Alaska Pollock.

From 2020 to 2021, favorability and preference for Wild Alaska Pollock also held steady.



Wild Alaska Pollock Tracking Closely with Competitors on Positive Opinion

When tracking next to other white fish, Wild Alaska Pollock is comparable to haddock in familiarity, but comparable to both haddock and tilapia in positive opinion. Clearly association with cod is beneficial to Wild Alaska Pollock in terms of favorability.



Statistically significant increase compared to 2020



No statistically significant change compared to 2020



Statistically significant decrease compared to 2020



Taste, cost, and health continue to be top priorities when it comes to buying fish, while sustainability jumped provenance in 2021



Important Fish Attributes

Overall Fish Importance Score (among fish eaters; T3B Summary)

#1 Taste

Great tasting
(79%)

Fresh tasting
(75%)

#2 Cost

Good value
(67%)

Affordable
(63%)

#3 Health

Heart healthy
(63%)

High in protein
(61%)

#4 Ease

Easy to prepare
(60%)

Freezer-friendly
(51%)

Important Fish Attributes

Overall Fish Importance Score (among fish eaters; T3B Summary)

#5 Versatile

*Whole family
will enjoy*
(57%)

*Good as
center of
plate*
(55%)

#6 Sustainable

Sustainable
(47%)

Wild-caught
(45%)

#7 Provenance

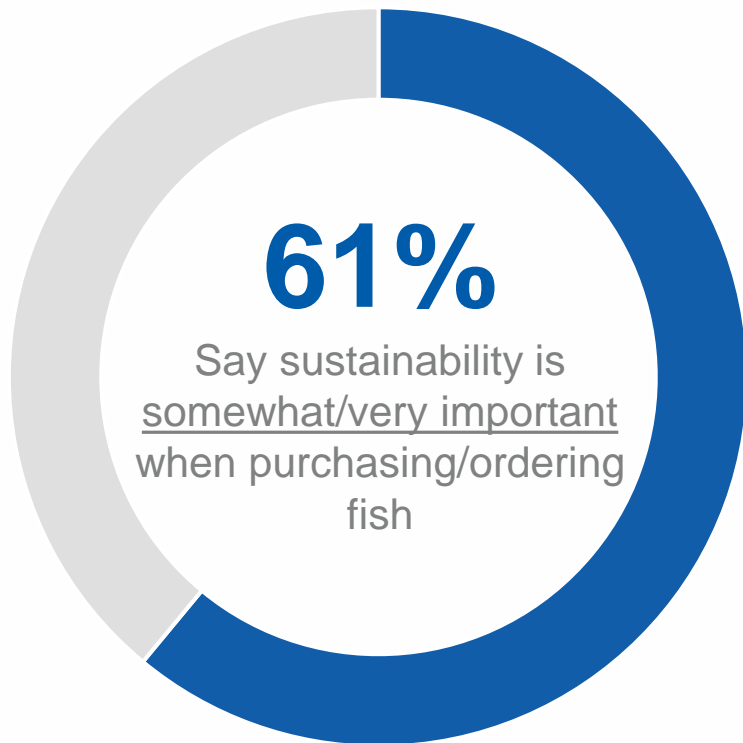
*Product of
U.S.*
(55%)

*Product of
Alaska*
(35%)

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? T3B Summary (8-10) Base: Fish Eaters (n=669)



Sustainability is a key driver when purchasing, with attributes aligning with current messaging points



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

- 70%** Safe for the ocean
- 67%** Ensuring supply for future generations
- 64%** Fishery management
- 56%** Zero-waste
- 55%** Carbon footprint
- 53%** Recyclable packaging
- 52%** Traceability



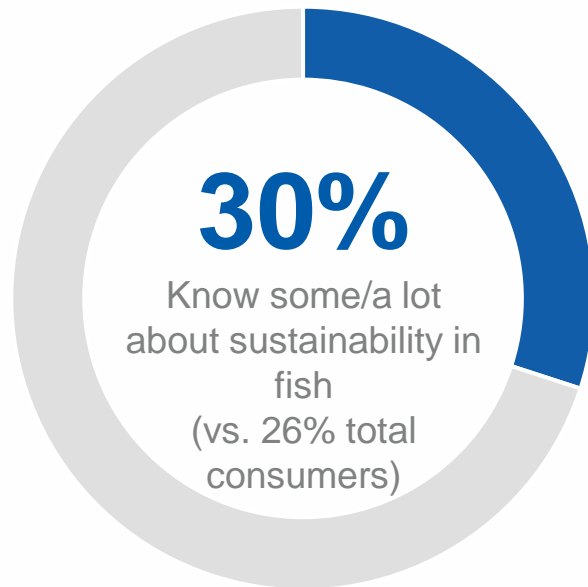
N37. How important is sustainability to you when purchasing/ordering fish? Base: Fish eaters (n=669)

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

Knowledge of Wild Alaska Pollock's sustainability is on par with general consumer knowledge of seafood sustainability



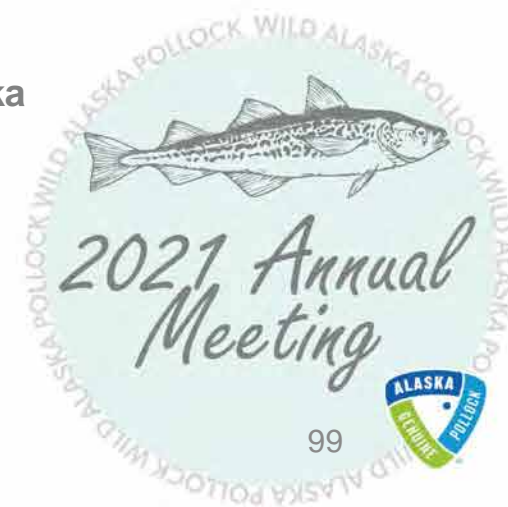
Sustainability knowledge



Knowledge of specific fish sustainability *(Summary: Those who know some/a lot)*

27%

Are familiar with the
sustainability of Wild Alaska
Pollock



N22. How much would you say you know about sustainability in fish? Base: Fish eaters (n=669)

N36. How familiar, if at all, are you with the sustainability of each of the following fish? Base: Fish eaters (n=669)

Leaning into wild-caught messaging is important as it's twice as impactful as organic and provides a competitive advantage for Wild Alaska Pollock



Terms that would increase their likelihood to order Wild Alaska Pollock in a high-end sit-down restaurant

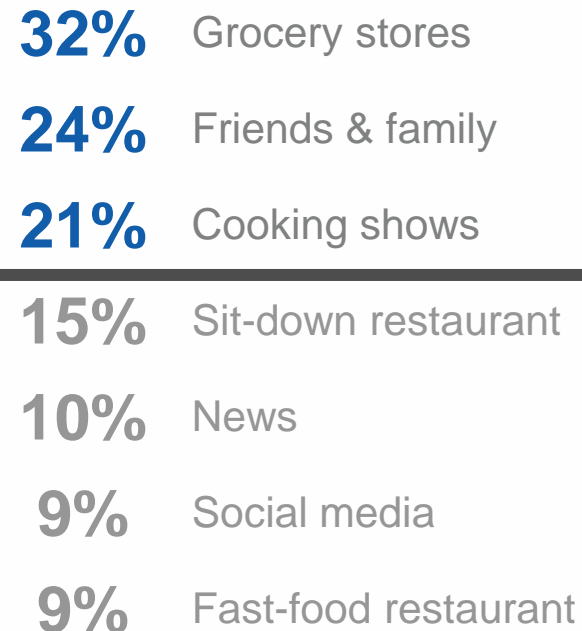
75%	Fresh-caught
63%	Natural
62%	Wild-caught
34%	Local
32%	Sustainable
27%	Organic



The gap between fish eaters consuming Wild Alaska Pollock in restaurants versus grocery stores has narrowed since last year's survey



How they learn about Wild Alaska Pollock



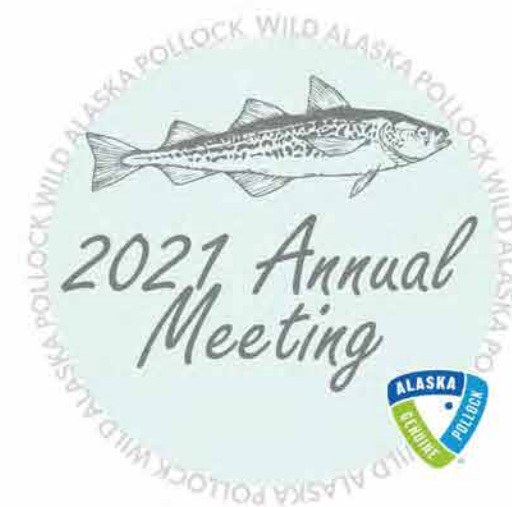
Likely to eat Wild Alaska Pollock in the following settings
(T3B on 10-pt scale)

38%

Are likely to eat at a
restaurant
(37% in 2020)

36%

Are likely to eat from
the grocery store
(vs. 44% in 2020)



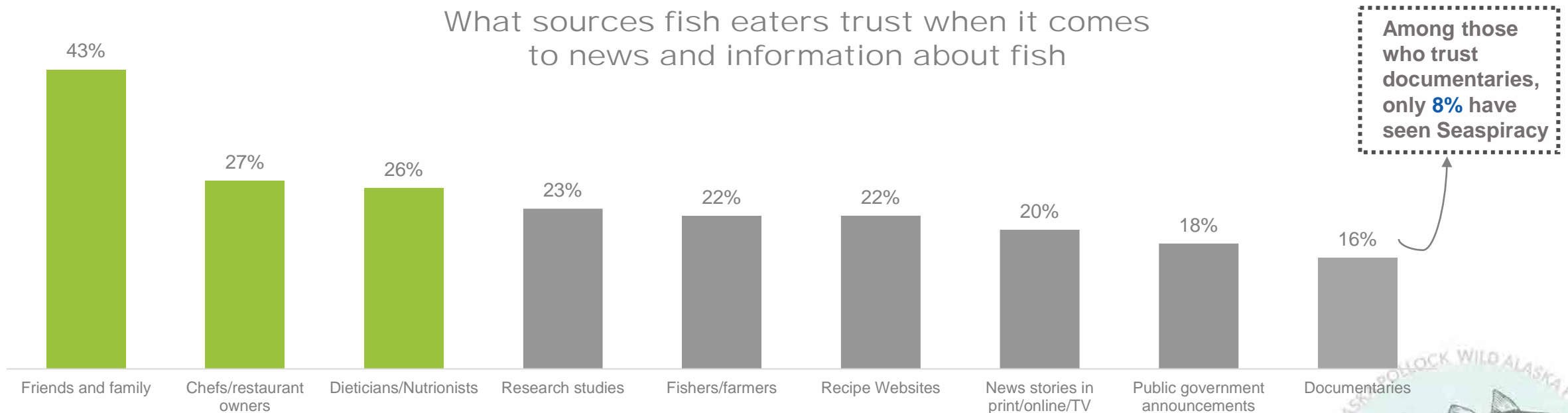
Q2. How did you learn about Wild Alaska Pollock? Base: Fish eaters aware of fish (n=275)

Q5. How likely are you to eat Wild Alaska Pollock from the following settings? Base: Fish eaters aware of Wild Alaska Pollock (n=275)

And when it comes to news about fish, this audience puts their trust in friends and family, as well as professionals in the food industry

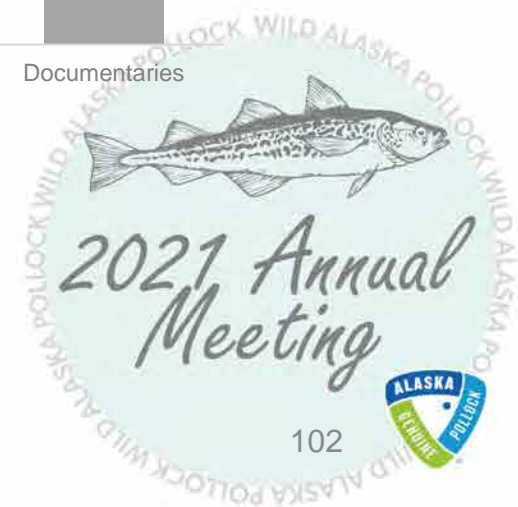


What sources fish eaters trust when it comes to news and information about fish



N30. Which of the following sources do you trust when it comes to news and information about fish? Base: Fish eaters (n=669)

N46. Which, if any, of the following documentaries have you seen? Base: Those trust documentaries, Fish eaters (n=105)



COVID-19 impact leaves an opportunity for Wild Alaska Pollock to be enjoyed at home and in restaurants



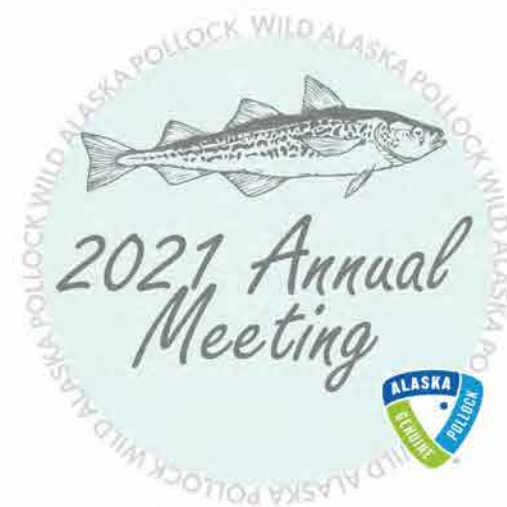
In 2020, Fish eaters' experimentation and purchase of fish soared amid COVID-19, with a high demand for healthy, easy-to-prepare, and sustainable fish.



Over the past six months, fish eaters maintained these purchase behaviors they picked up during quarantine and saw a slight increase in their time to cook (21%).



In the next year, this audience expects these actions to hold steady.



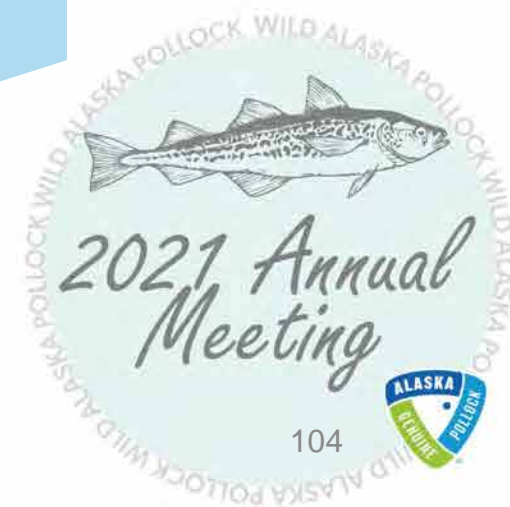
Key Takeaways

Create a continuous drumbeat of multichannel content to build awareness and educate consumers

Continue to emphasize key messaging pillars as they fall in line with consumer perception and expectation

Identify opportunities to partner with trusted sources for information to disseminate information about Wild Alaska Pollock

Taste continues to reign as a priority for purchase so lean into recipes and visual content to help heighten awareness of delicious usage ideas

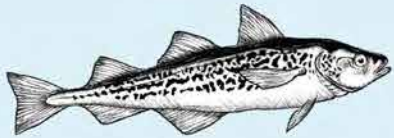
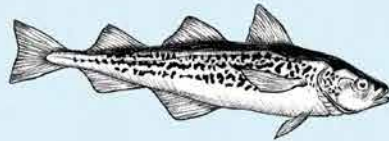


What Does This Mean for GAPP?

- **Sustainability is moving up in the minds of consumers** and has evolved beyond certifications from credible organizations. It is no longer enough to place a seal/certification on packaging or on the website.
- Consumer-friendly language such as **'Wild Caught' must be incorporated into communication channels** as it increases likelihood to purchase. Terms such as **'Wild Caught' will continue to set Wild Alaska Pollock apart** from other animal proteins which use terms like organic.
- Consumers **trust information from chefs and restaurants**. If we want to increase demand for Wild Alaska Pollock, GAPP must continue to make Wild Alaska Pollock a part of the dining out experience and invest in specific programming that reaches chefs at sit-down restaurants versus quick-service restaurants.



QUESTIONS?



BREAK



 Breaktime for PowerPoint by Flow Simulation Ltd.

Pin controls when stopped ☒



Title Sponsor



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Edelman



NEPTUNE

Ketchum
empathy + intelligence



UrnerBarry
MARKET PRICES, NEWS, AND ANALYSIS

Clark Nuber PS



Wild Alaska Pollock's Nutritional Niche



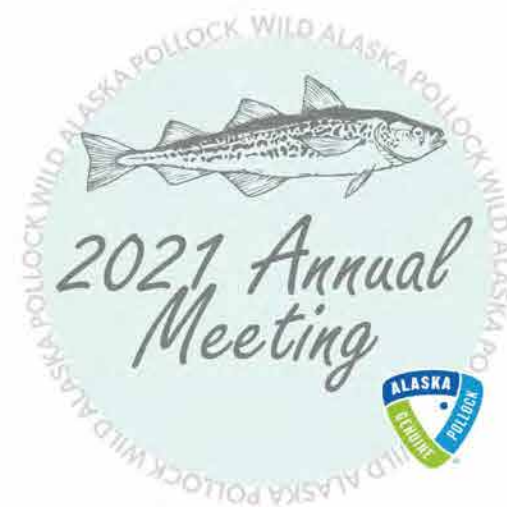
Kathryn Harrington
Senior Vice President



Jenna Mills
Account Coordinator



Eat Well Global





Eat Well Global

OUR MISSION

To empower global
change agents in food
and nutrition

OUR VISION

A world where good
nutrition is good business



CORE CAPABILITIES



360 DEGREE GLOBAL INSIGHTS
ANSWERS THE BIG QUESTIONS



STRATEGY AND PLANNING
CHARTS THE COURSE



MULTIPLATFORM STAKEHOLDER ENGAGEMENT
TAKES THE SHOW ON THE ROAD

When it comes to nutrition marketing, healthcare professionals are essential



The Assignment

1

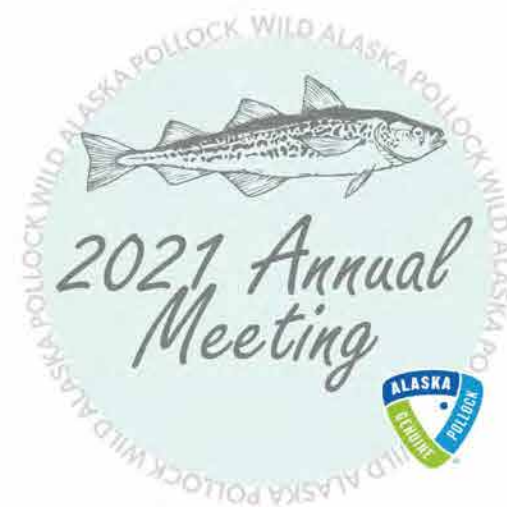
Optimal Consumer Audience

Using a nutrition lens, identify the optimal audience for popular Wild Alaska Pollock products in the US

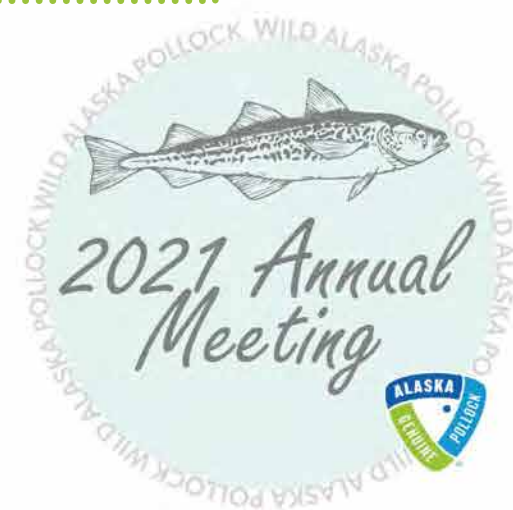
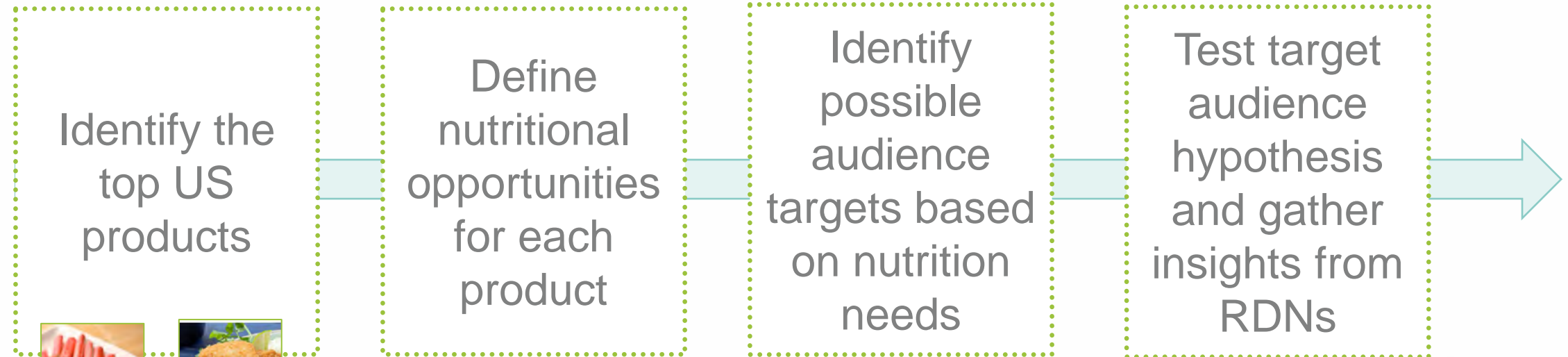
2

Point Of Difference For Elite Athletes

Using a nutrition lens, determine Wild Alaska Pollock's potential point of difference from other popular protein sources, for elite athletes



Our Approach: learning to which groups RDNs would recommend Wild Alaska Pollock



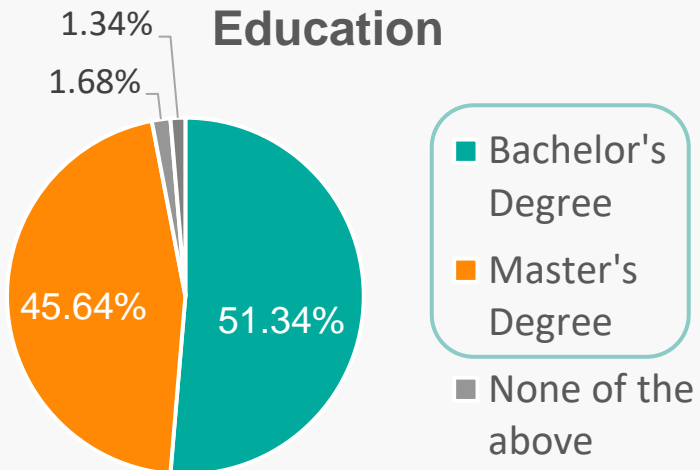
We worked with Today's Dietitian to survey nutrition experts



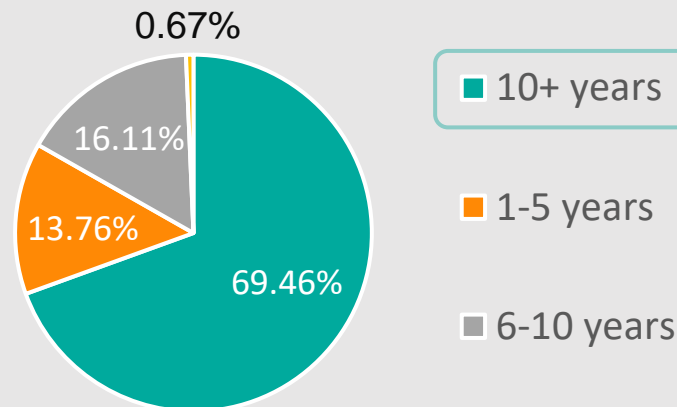
**Sent to 14,000
patient-facing
RDs**

298 respondents

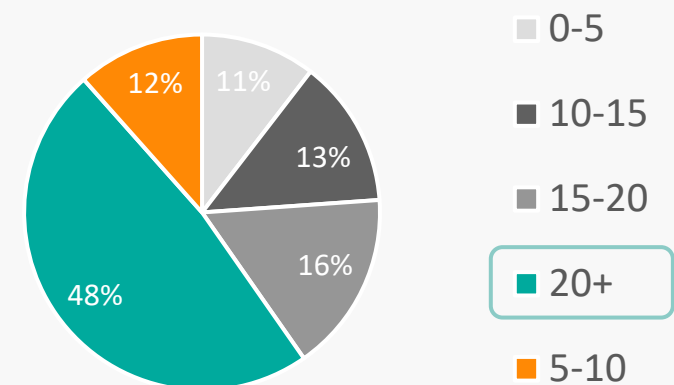
Education



Years in practice



Patients per week



We asked two key questions



To what **patient groups** are RDNs recommending Wild Alaska Pollock products?



What are their **key drivers**?



RDNs say adults are the optimal audience

RDNs who recommend the products are most likely to recommend to **adults.**



91%
would recommend
surimi
to adults



88%
would recommend
breaded & battered fillets
to adults



93%
would recommend
QSR sandwiches
to adults



78%
would recommend
fish sticks
to adults



Several nutrition opportunities emerged

50% of dietitians view Wild Alaska Pollock products as part of a **nutritious diet**



Key Drivers

- Easy to prepare
- Source of seafood
- Source of protein

Adults are the #1 **target audience** to whom HCPs would recommend WAP products



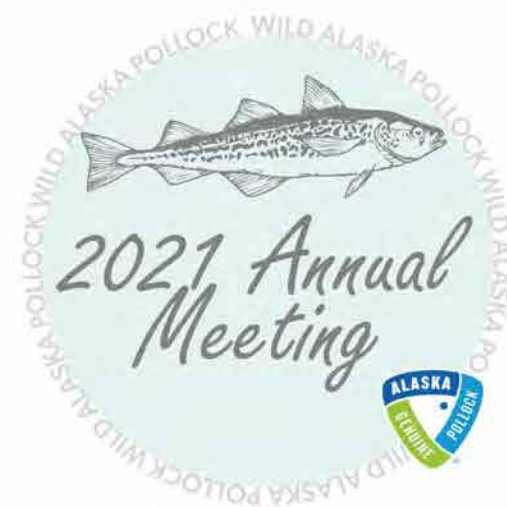
The nutrition story for widely available Wild Alaska Pollock products is positive



50% of surveyed dietitians view popular Wild Alaska products as part of a **nutritious diet**.

Wild Alaska Pollock products can help meet **adults** meet weekly seafood recommendations.

The various, easy-to-prepare formats of Wild Alaska Pollock products, offer adults a **convenient source** of **high-quality protein**.



There's future opportunity for popular Wild Alaska Pollock products



Message Testing

Continue to refine and test nutrition messaging for adult audiences



Nutrition Research

Consider nutrition research to enhance nutrition messaging

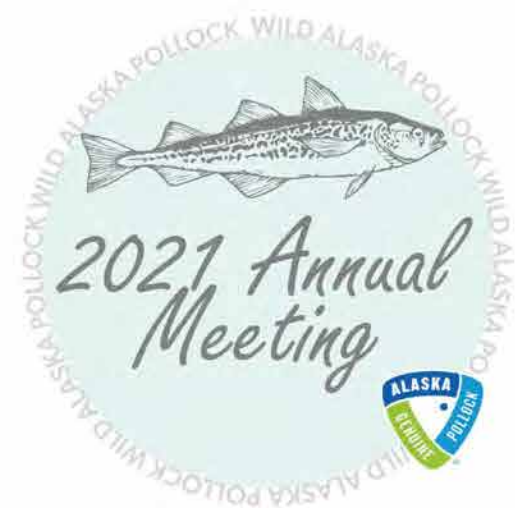


Education Programming

Explore RDN education opportunities to learn if there are opportunities with other patient populations



Part 2: The potential point of difference for elite athletes



Our Approach: evaluating WAP viability with elite athletes

Sports RDs interviews

Nutrition analysis, with a close look at leucine



Three sports dietitians shared their opinions on optimal protein sources



Dr. Matt Frakes

PhD, RD, CSCS

**Director of
Sports Nutrition**
Notre Dame
University



Marie Spano

MS, RD, CSCS, CSSD

Sports Dietitian
Atlanta Braves
Atlanta Hawks
Atlanta Falcons



Lauren Thomas

MS, RD, CSSD

Tactical Dietitian EXOS



Athletes gravitate to the familiar

Chicken, steak, eggs are staples

Athletes tend to like **fish varieties they are familiar** with salmon, tuna, and shrimp being more popular

Convenient and portable protein sources like Greek yogurt, cottage cheese, jerky, and canned tuna help athletes meet their needs amidst busy schedules

Plant-based diets are top of mind for some athletes after watching *Gamechangers*

Branched-chain amino acids (**BCAAs**) are top of mind, **leucine**, specifically, is desirable



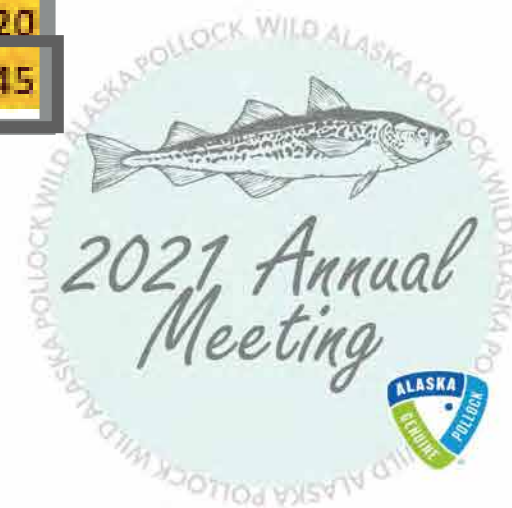
A closer look at nutrients reveal Wild Alaska Pollock measures up to other protein sources*

Protein Source	Protein (g)	Leucine (g)	Total Fat (g)	Sat Fat	Omega 3s (g)
Chicken Breast	31.00	2.33	3.57	1.01	0.000
Eggs	12.60	1.09	9.51	3.13	0.000
Choice Beef (sirloin)	29.30	2.33	9.67	3.75	0.000
Milk (1%)	3.48	0.34	0.97	0.604	0.000
Canned Tuna	29.10	2.37	8.21	1.53	0.128
Cod Fillet	22.80	1.86	0.86	0.168	0.171
Tilapia Fillet	26.20	2.04	2.65	0.94	0.195
Salmon Fillet	22.10	1.80	12.4	2.4	2.320
Wild Alaska Pollock Fillet	19.40	1.64	0.99	0.203	0.345

Represents the top 4 most favorable protein sources for each nutrient

As compared to other protein sources, Wild Alaska Pollock ranks most favorably in **total fat, total saturated fat, and Omega 3 content.**

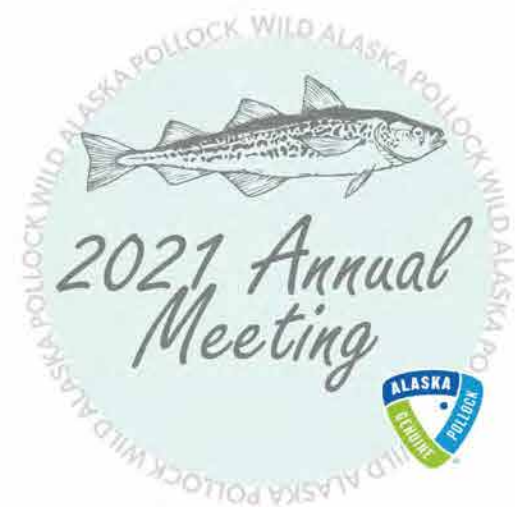
Source: USDA Database and Eurofins leucine study; all protein sources are standardized in 100g servings



Wild Alaska Pollock in its purest form may appeal to athletes as...



- ✓ **Lean, high-quality *protein***
- ✓ **Low in calories, fat & saturated fat**
- ✓ **A source of *omega 3s***
- ✓ **A source of *leucine***
- ✓ **Affordable price**
- ✓ **Sustainable**

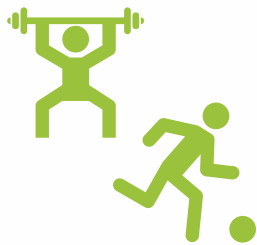


Future opportunities for athletes means more research



Message Testing

Test the value propositions to learn if athletes are receptive to changing up their protein sources



Nutrition Research

Further scientific studies may reveal additional benefits to athletes



The bottom-line on nutrition is there's a positive story to tell

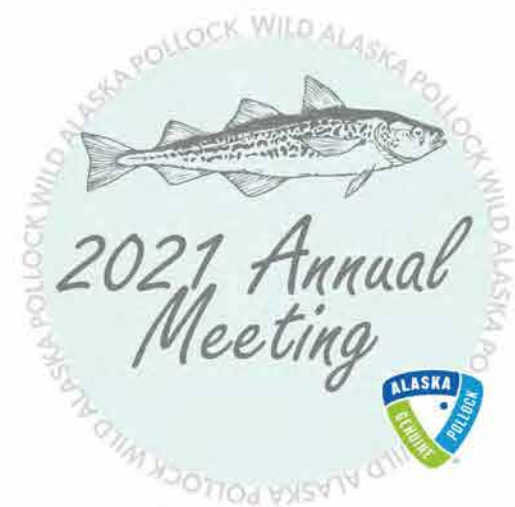


Adults

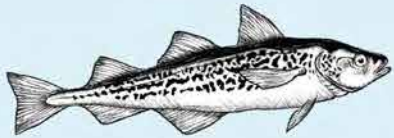
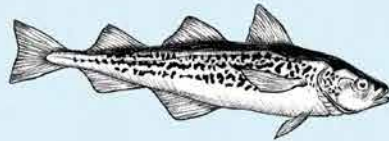
Leverage key drivers to connect with adults on the most popular products in the marketplace

Athletes

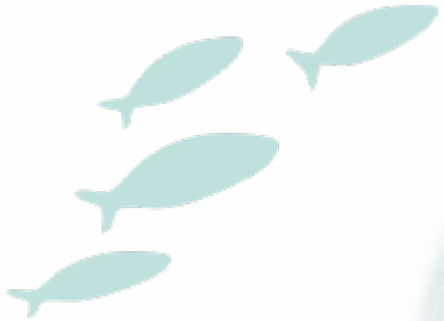
Consider future research to really make WAP stand out from the protein crowd



QUESTIONS?



Wild Alaska Pollock 2040: Potential for Wild Alaska Pollock in Current and Future Markets



Erin Harrington
*Consultant at The
McKinley Group*



Rasmus Soerensen
*Executive VP of Global
Sales at American
Seafoods*



Today's Presenters



Rasmus Soerensen
American Seafoods

- EVP Global Sales & Marketing
- Chairing working group
- Facilitating industry engagement with research process

Erin Harrington
McKinley Research Group

- Nearly 50 years in research-based consulting (formerly McDowell Group)
- Two decades as seafood market analysts for ASMI
- Previous experience with emerging market analysis



Research Purpose



- Thoughtful, data-driven assessment of long view trends
- Support informed prioritization of current and potential markets
- Provide a solid foundation for strategic investments
- Increase global demand for Wild Alaska Pollock and maximize value over time



Research Process



Phase 1 – Establish Evaluative Criteria

Identify metrics and indicators and supporting data sets to guide research



Delivered in September



Research Process



Phase 2 – First Tier Data Assessment

Fishery data key at early stage

Interview GAPP key informants

Results – approx. 20 markets

Early November



Research Process



Phase 3 – Deep Dive



Complementary data, further research
on market conditions, prepare profiles
and SWOTs for 20 markets

Late February



Research Process



Phase 4 – Results

Deliver profiles and supporting work for use by GAPP/partners

Early March



Project Contact

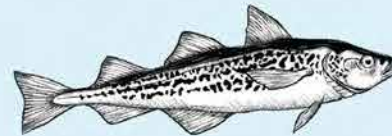
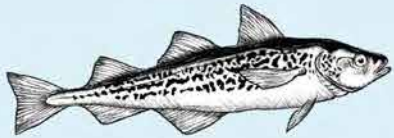
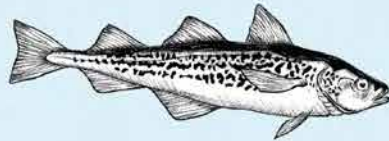


Formerly McDowell Group

Erin Harrington
McKinley Research Group
eharrington@mckinleyresearch.com
(907) 351-6374



QUESTIONS?



Ketchum is a global public relations firm, offering marketing, branding, and research communications to GAPP's digital communication efforts.

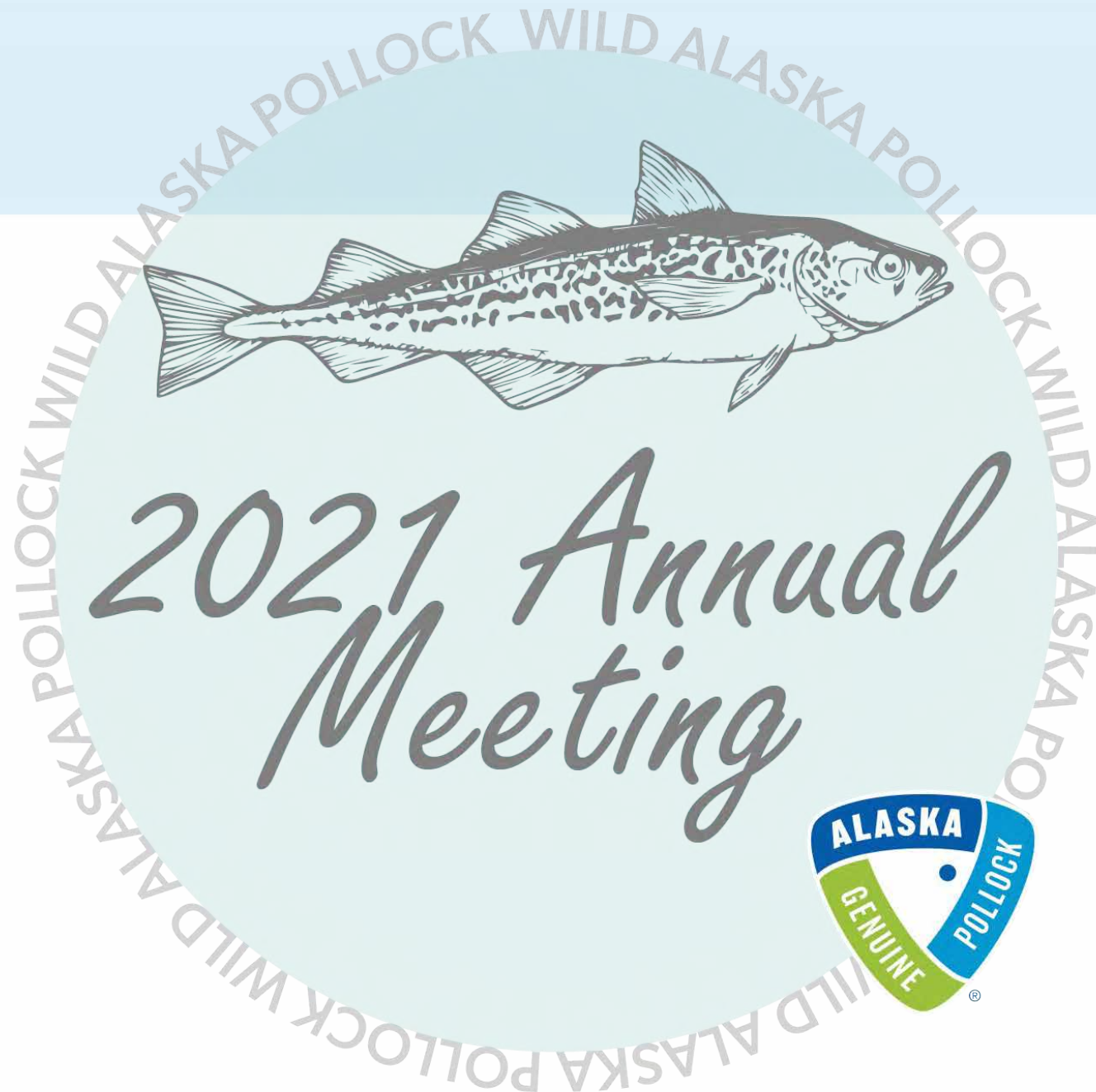


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R3 Consulting delivers Research, Insights, Marketing, Brand Strategy, Design, Digital and Communication to communities by transforming data and making it come to life. R3 plays a huge role in the execution of GAPP research projects.





"Harnessing
Surimi's
Star Power"



Top Hand Award



Past Recipients



Bob Desautel
2019



Margery Schelling
2019



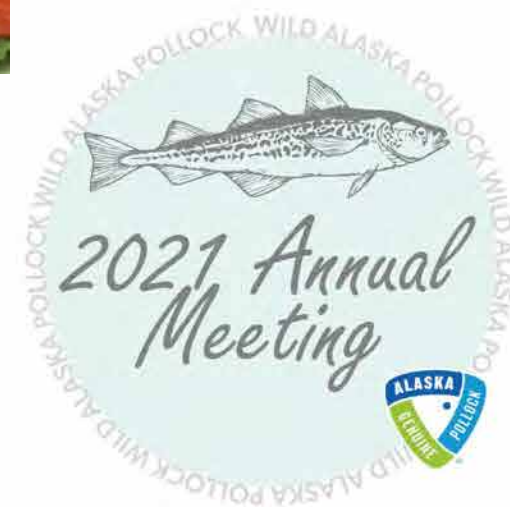
2021

New Recipient- Lou Shaheen



Lou Shaheen
2021

Dedication and commitment to raising awareness of our perfect protein!



[Our Products](#)[Recipes](#)[About Us](#)[Where to Buy](#)[Contact Us](#)

CLIMATE FRIENDLY PROTEIN



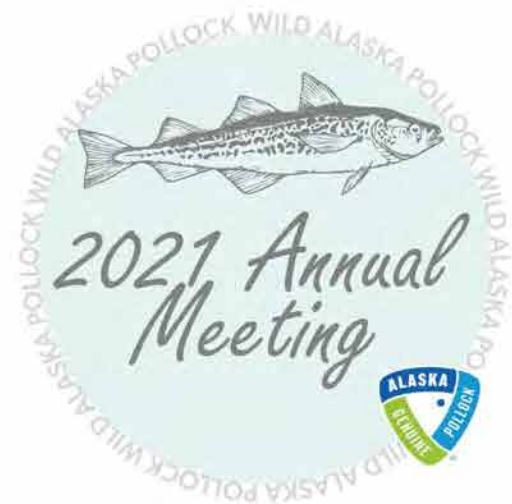
WILD ALASKA POLLOCK HAS SIGNIFICANTLY LOWER CARBON IMPACT THAN BEEF, CHICKEN AND PLANT BASED FOODS.

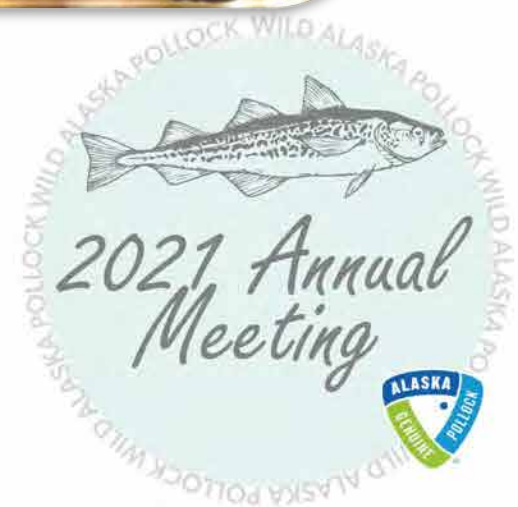
[SEE RESULTS ▸](#)



Association of Genuine Alaska Pollock Producers Top Hand Award

In recognition of dedication above and beyond to bringing the entire Wild Alaska Pollock industry together behind the GAAP mission to raise awareness and build demand for our perfect fish.
Presented with appreciation to the following individuals:





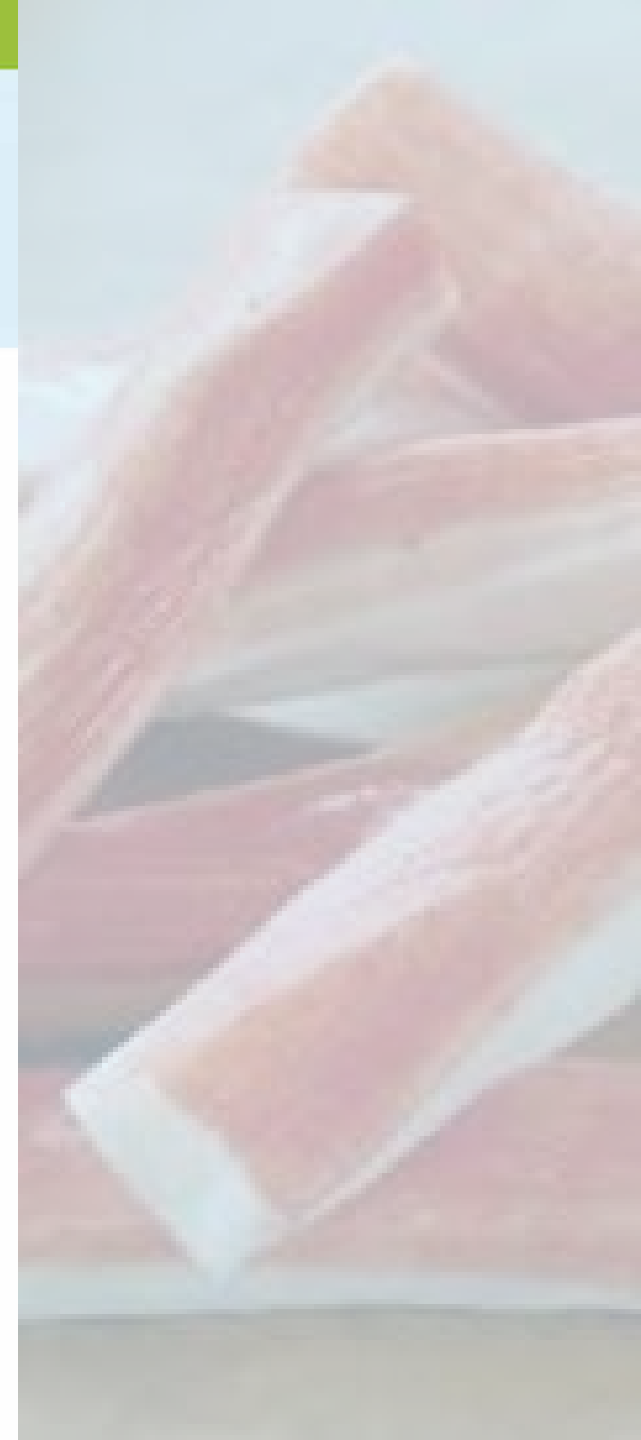
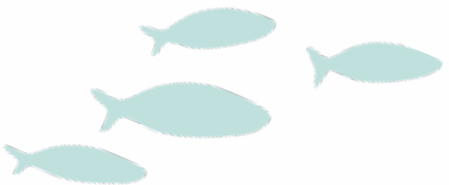
What Makes Surimi Spectacular



Craig Morris
CEO of GAPP



Sharon Ripps
*Marketing Research
Consultant for GAPP*



This year, we began our surimi seafood growth journey with consumer research

Our Spectacular Take-Aways

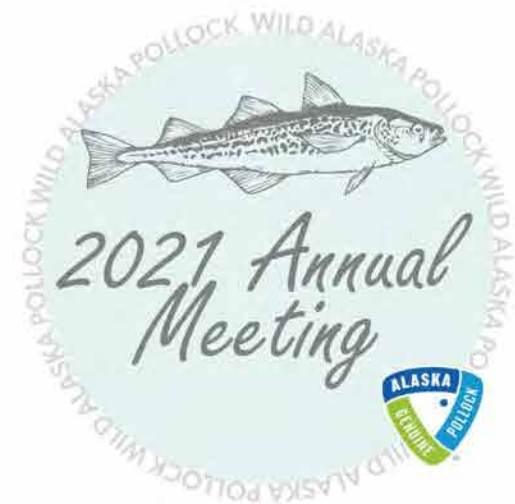
- Today's consumer is okay with calling it imitation crab, tomorrow's consumer is not!
- Emphasizing that it is 'real food' made from Wild Alaska Pollock increases interest
- Consumer want to break out of their surimi seafood routine and discover new recipes and occasions to use it.
- The most important messages to drive purchase and satisfaction are great taste, tastes like crab and high quality.



Surimi Seafood: Roadmap to Growth



A Brief Learning Overview & Where We Go from Here



What we learned



Imitation crab has a **niche consumer base who purchase it frequently**, but there are **opportunities for growth**.

36%
Ever Purchased



24%
Frequent Purchaser



Regardless of purchase frequency, **imitation crab is not very top-of-mind** and more **recipe ideas are desired** by consumers.



What we learned



The most important drivers of purchase & satisfaction include:



What we learned



There is a **lack of knowledge about imitation crab** and awareness of it being made with Wild Alaska Pollock.

Once consumers learn it is made of real Wild Alaska Pollock there **opinion of the product increases**



Focus health messaging on the consumer desired benefit of **high protein and Omega 3's**.

Feature hero products for communication that deliver on consumers' desire for **an all-natural crab alternative without artificial ingredients or preservatives**.



Sustainability, origin and source are not purchase drivers, but could be if **through messaging are meaningfully linked to the top drivers of taste and quality**.

What we learned



The **most common barriers** for **purchasing** include:



Lack of
Saliency



Limited
Recipes &
Occasions



Taste
Perceptions



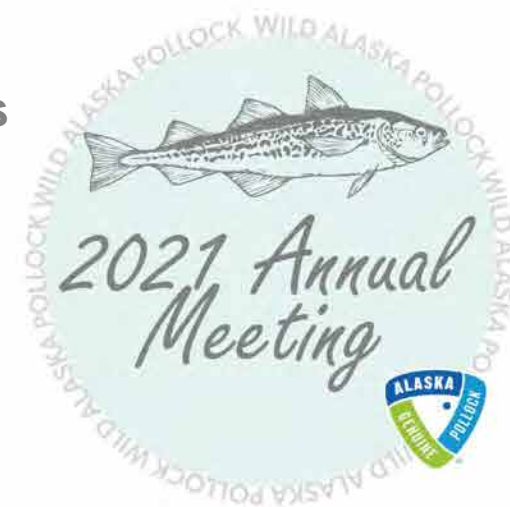
Changing Consumer Perceptions is Our #1 Priority

FROM

- From thinking it is imitation/fake
- From not knowing what it is
- From just being imitation crab products

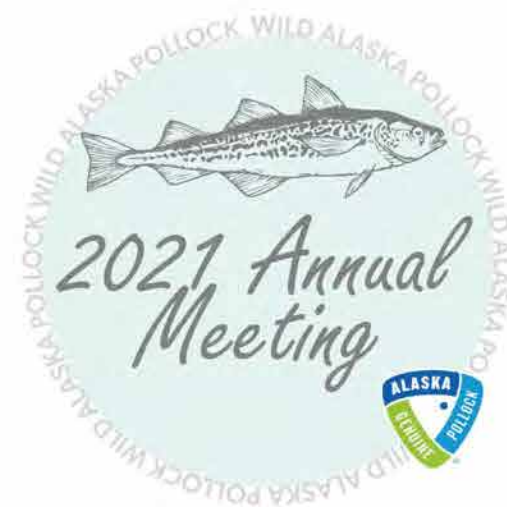
TO

- To knowing its a great tasting, craveable protein made from real seafood (Wild Alaska Pollock)
- To having a positive opinion of surimi seafood as a good, high quality and healthy protein
- To know it exists and generally what it is
- To a viable protein alternative and substitute protein for other seafood.



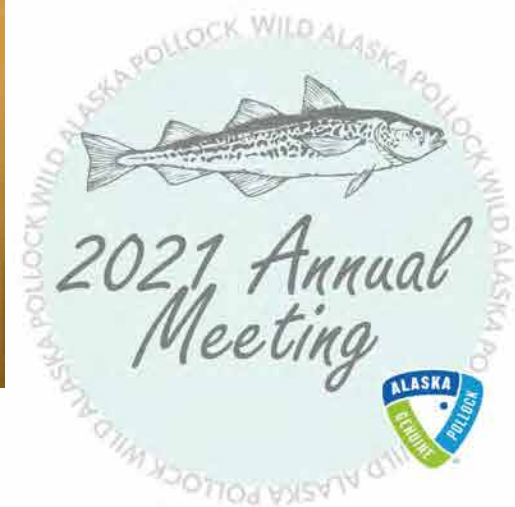
Supporting current consumers & bringing in future cZonsumers is also critical

- Develop and promote new ways/recipes for consumers to use surimi seafood
 - Ease of use in favorite recipes
 - Quick and easy protein solution
 - Craveable recipe solutions
- Bring in new consumers into the category, particularly younger consumers (Millennials [25-40] and Gen Z [16-24]) with an on-trend, authentic and relevant products and messages.



Increasing saliency needs to happen not only at home but also at the store

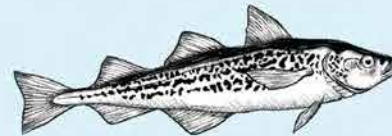
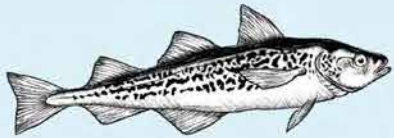
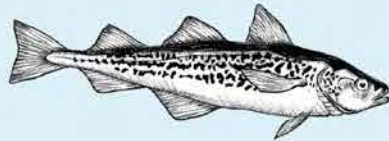
- Retail is key to increasing surimi seafood awareness, traffic and purchase in seafood sections that we don't own.



Our surimi learning journey continues...

- In 2022, GAPP has more learning opportunities in-store to help the industry drive continued surimi growth.
- We'll be viewing surimi with a wider lens, not just as imitation crab but also in new and innovation applications.
- **Key initiatives in the works are:**
 1. Learning how to drive more growth for surimi seafood in retail by educating seafood buyers about the value of the surimi seafood shopper and category management best practices
 2. Learning how to harness the power of social media influencers to drive surimi sales
 3. Learning how the Surimi-focused Partnership Programs performed and what we can apply as best practices going forward, for surimi seafood as well as new to the world innovations.

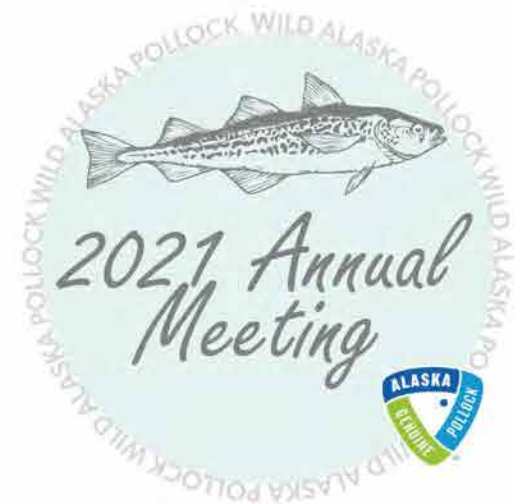
QUESTIONS?



Thank you to our Bronze Level
General Sponsor



Seatech Corporation has sold high quality seafood since 1982 and provides seafood news to the Wild Alaska Pollock industry and more!



Thank you to our Gold Level General Sponsor



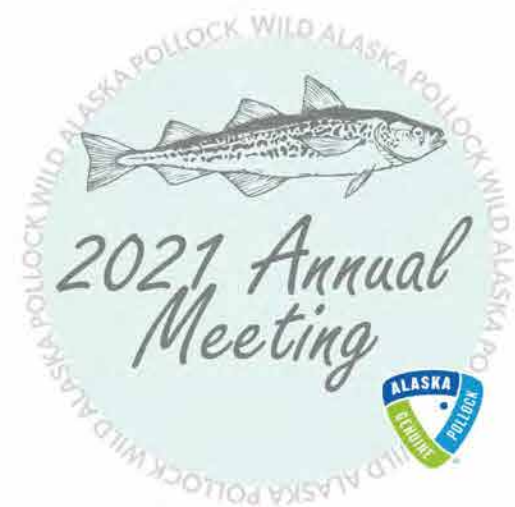
Edelman is an award-winning global public relations consultancy firm that often partners with businesses in the seafood industry to evolve, promote and protect their brands.



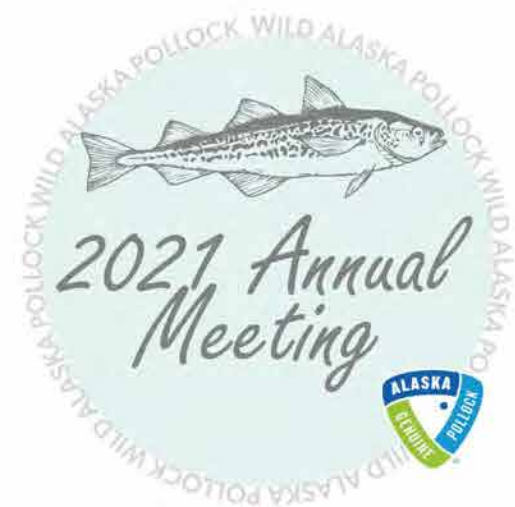
What's in a Name: The Labeling Battle



John Connelly
President of NFI

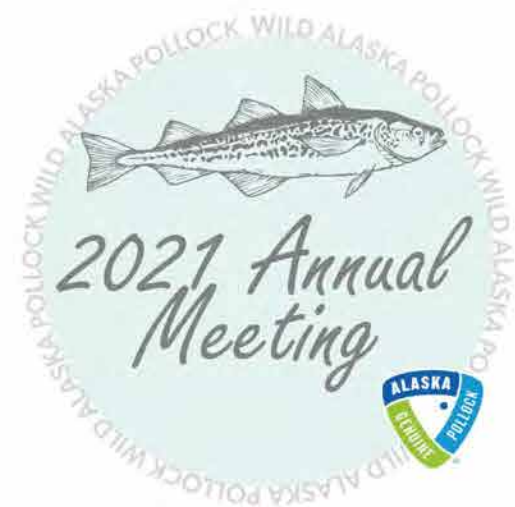


Marketing Needs and Political Choices



Use of Word "Surimi"

- Recognize that “surimi” is the paste of fish protein derived from repeated rinsing of certain fish
- In this short presentation, though, will use surimi to include the consumer products derived from that paste



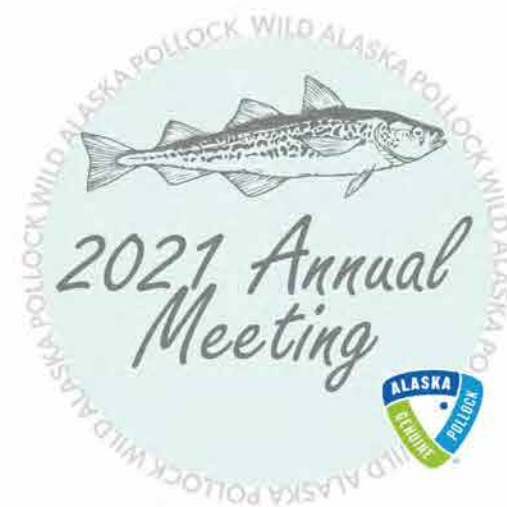
History of Surimi Naming

- NFI and others have since 1993 worked off and on to change surimi labeling requirements
- 1993: FDA invited industry to develop “surimi” into well understood consumer term
- 2006: FDA allowed “(crab)-flavored seafood, made with surimi, a fully cooked fish protein” as alternative
- 2010: FDA clarified that alternative language was not available for fish consumers would recognize (e.g., crab legs)



Key FDA Language

- Common and usual name accurately describes, in simple and direct terms, the basic nature of the food and its properties
- “**Imitation**” need not be used if:
 - Product not portrayed as a whole or part of natural fish
 - Product name is not same as the standard of identity of a fish
 - Product name and graphics do not mislead consumers to believe it is a natural seafood product

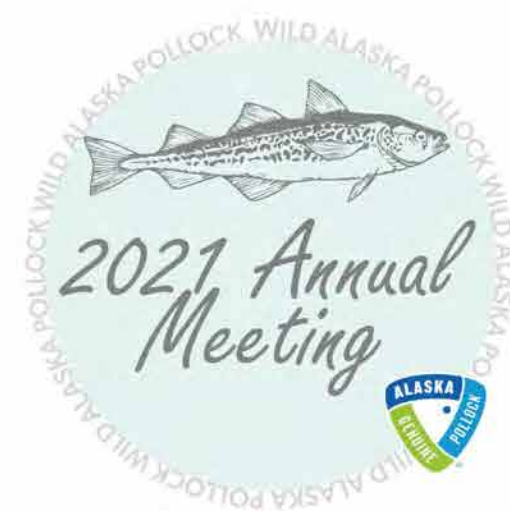


Parallels to Plant-based Foods




- If FDA allows a “mushed up salad” to be called a fish fillet

..... certainly a pure fish protein need not be called “imitation”



Discussion of path forward

- Surimi marketers must decide if “imitation” is serious barrier to growing category
 - Lobbyists can develop regulatory and/or legislative approaches to addressing “imitation” requirement
 - Pollock company leadership must determine if the political effort is worth the marketing need
 - NFI prepared to work with coalition of like-minded groups to address the political need
- 



Questions?



John Connelly
jconnelly@nfi.org
1-571-235-7467



Thank you to our Bronze-Level General Sponsor



Trident Seafoods is the largest seafood company in the United States, a member of GAPP, and brings Wild Alaska Pollock to plate through both retail and foodservice.



WILD ALASKA POLLOCK WILD ALASKA POLLOCK WILD ALASKA POLLOCK WILD ALASKA POLLOCK WILD ALASKA POLLOCK

2021 Annual Meeting

ALASKA
SEAFOOD
POLLOCK

Dine Out To Help Out- Chicago Restaurant Week

Dine Out to Help Out With
Wild Alaska Pollock at...

Hyatt Lodge



2815 Jorie Blvd
Oak Brook, IL 60523



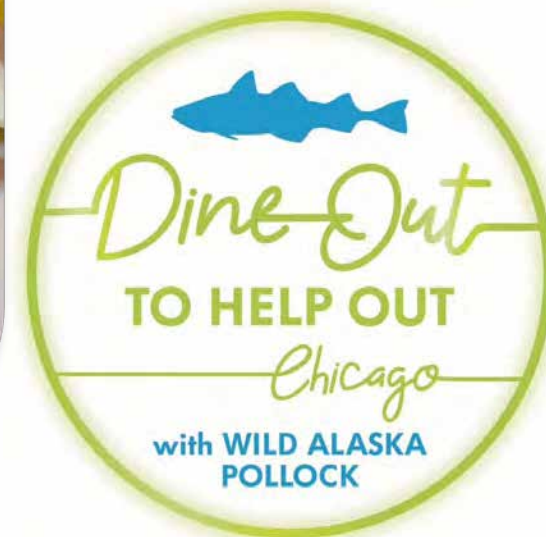
Seafood Gumbo



Baja Fish Taco

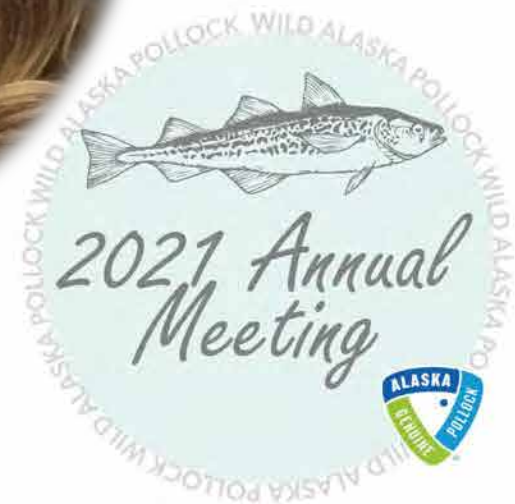


Dine Out To Help Out- Chicago Restaurant Week



Sleigh the Holidays with Surimi: Holiday Campaign Influencers

Mary Elizabeth Germaine
*Partner, Managing Director at
Ketchum Analytics*



What the Surimi A&U Told Us

The recent Surimi A&U study was filled with data driven findings to help GAPP understand more about consumer attitudes, perception and awareness of surimi seafood. As part of the study, two takeaways became clear:

1. Consumers are not knowledgeable about how imitation crab is made or what ingredients it has, and often associate imitation crab with being unnatural, processed, and artificial.

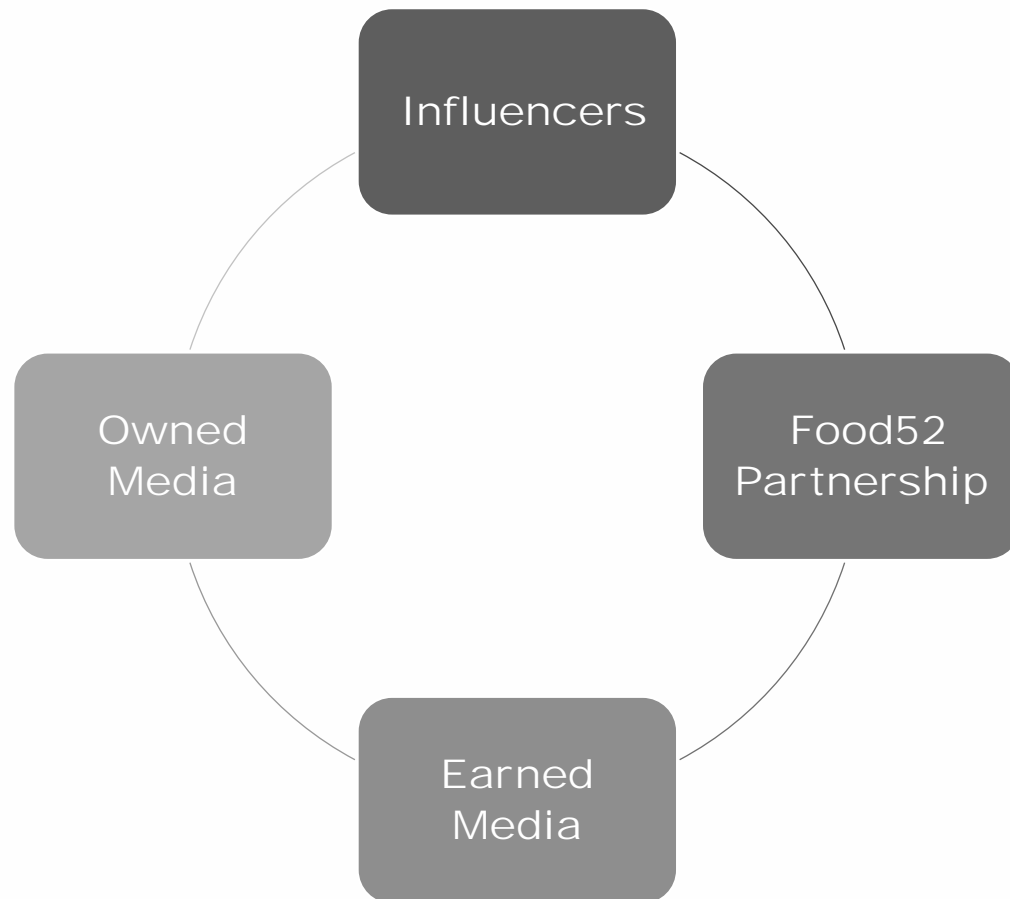
Awareness of Wild Alaska Pollock in imitation crab elevates purchase frequency and positively impacts interest for more than a third of consumers.

2. Although imitation crab is viewed as easy-to-use and versatile, it is also perceived as having limited usage occasions, and a lack of saliency hinders more frequent purchasing among category users.

Purchasers are looking for more ways in which to use imitation crab and seek recipe inspiration for ideas



Seizing an Opportunity



Grounded in consumer research and insights, GAPP created a 360-consumer campaign, the biggest in the history of the association, to drive education about Surimi Seafood and inspire usage ideas amongst an audience ripe for action.



Identifying the Right Influencers



Utilizing omniearnedID to inform our influencer strategy



New approach to influencer strategy: Identification

Initial shortlist of 16 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 of 25-34 years old)

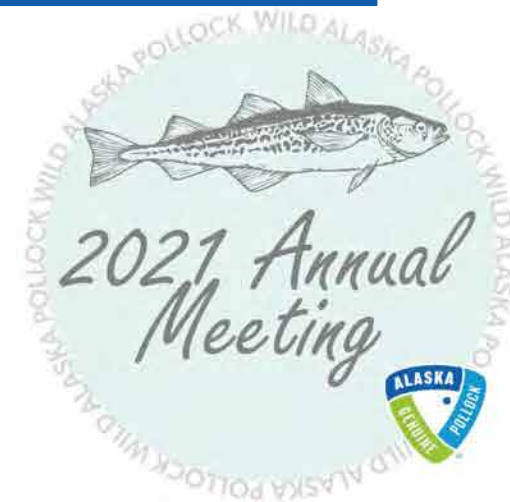
Traditional approach to influencer identification

Narrowed down to 6 influencers

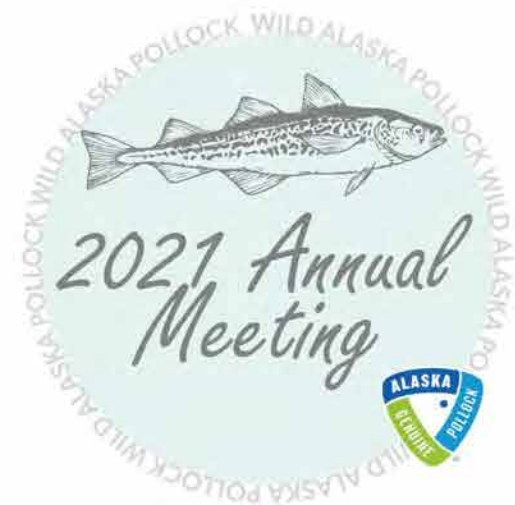
Chosen based on their audiences' likelihood to purchase surimi vs. all audiences and the average surimi dollars, units and purchase trips.

New approach to influencer identification

2 Influencers



Top Influencer Recommendations





EG: 3.6%

A former food editor at *Bon Appetit*, Molly Baz is a talented cook, recipe developer, video host, cookbook author and more. With a lifelong love of cooking, eating and teaching, Molly has risen in the Culinary world and continues to share her passions around savory foods.



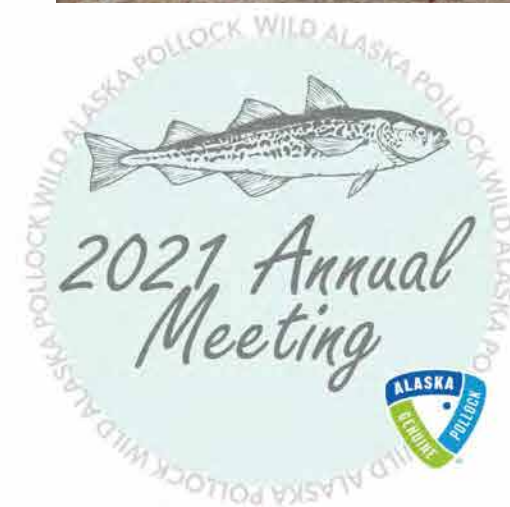
if you're looking at this photo and thinking to yourself "oh no she di'nt just put dill in her lobster roll" well, sir, you are sorely mistaken. this is now the only lobster roll that matters to me, and it's also the last weekend of summer so I think we both know what you're making now don't we!!!



summer's not over yet, tomatoes still be poppin', etc etc.
(recipe out now, L IN B will get ya there!)



so, I'm thinking we should ALL circle up, and kick things off together the right way—with a bomb dot com roast chicken. there's a QR code right in the recipe that will teach you how to carve the whole chicken so no excuses on that front!!! and if you're plant based or looking for a little somethin' extra, the Smooshed 'n Crispy Potatoes






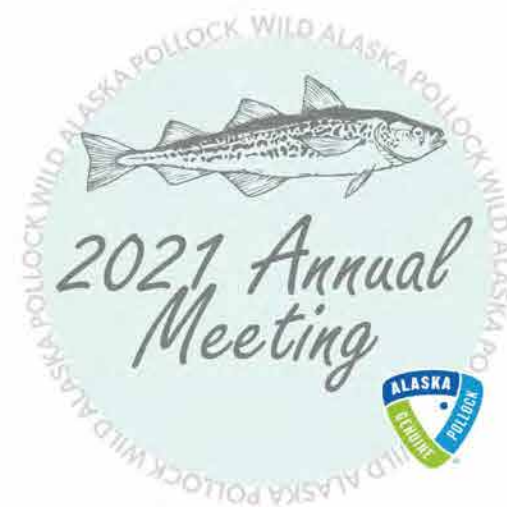


EG: 0.9%

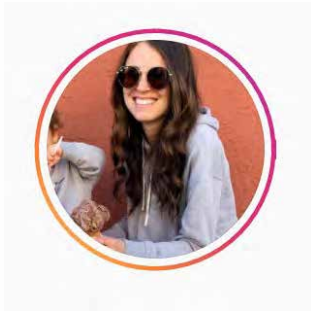
Jessica is a fulltime recipe developer, food blogger and content creator. She is the author of the bestselling cookbook *Seriously Delish* and has been sharing her best tips and tricks for feeding her family as a busy mom since 2009. Her culinary repertoire consists of everything from comfort food to cocktails.



howsweeteats  our favorite Sheet Pan Shrimp Fajitas are part of this week's menu plan that's up on the blog today!  link is in my profile for alllllll the delicious meals to make. 



Top Influencer Recommendations



@rachlmansfield



IG: 456K followers

EG: 0.9%

% of audience 25 – 34: 60%

Rachel is a Hoboken based recipe developer who prides herself on creating meals with 'just the good stuff'. Working with her husband, the pair share content around quick and easy meals that are also healthy and delicious.



rachlmansfield • umm yes i bought seaweed snacks and asked my father-in-law for some grilled fattyyyy wild king salmon (he makes it the best) just so i could try the SALMON RICE trend 🍣🍣
don't @ me for my chopstick skills 🍴🍴

@emilymariko #rachleats #salmonrice #easyrecipes #healthyfood #wholefoods #traderjoes #salmon #lunchideas #healthyrecipes #feedfeed #asmr

rachlmansfield • when pumpkin met bacon 🍂🍂🍂
CREAMY pumpkin bacon carbonara - hold the cream please 🙏

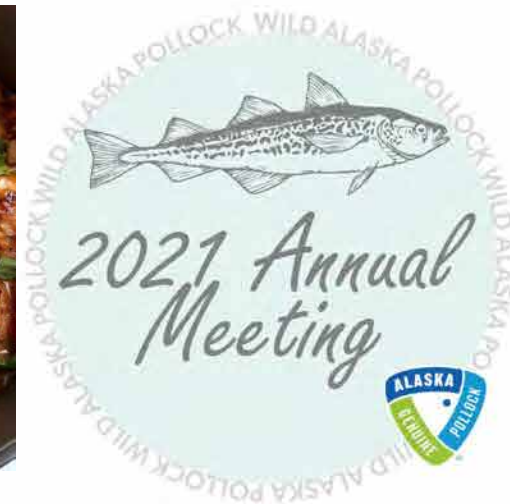
the flavors in this dish alone had us coming back for seconds. it's such an "easy" carbonara recipe that's lighter than the usual, easy to make and the bacon addition truly takes it to the next level 🍴

LINK TO RECIPE IS IN MY BIO +
rachlmansfield.com/creamy-pumpkin-bacon-carbonara-pasta/



rachlmansfield • this is for all my friends looking for an eassssyyy dinner to make right now: THAI TURKEY MEATBALLS IN COCONUT CURRY! our family's go-to all the time. takes 30 minutes to make and tastes soooo good on some rice or noodles and veggies! 🍴🍴

LINK TO RECIPE IS IN MY BIO +
rachlmansfield.com/healthy-thai-turkey-meatballs-in-coconut-curry/



Top Influencer Recommendations



@sohlae



IG: 556K followers

EG: 2.5%

% of audience 25 – 34: 65%

Sohla El-Waylly is a chef, restaurateur, and YouTube personality committed to breaking boundaries in the food industry. She was an assistant food editor at *Bon Appétit* and now proudly creates content for *Food52* and runs her YouTube series *Off-Script with Sohla*



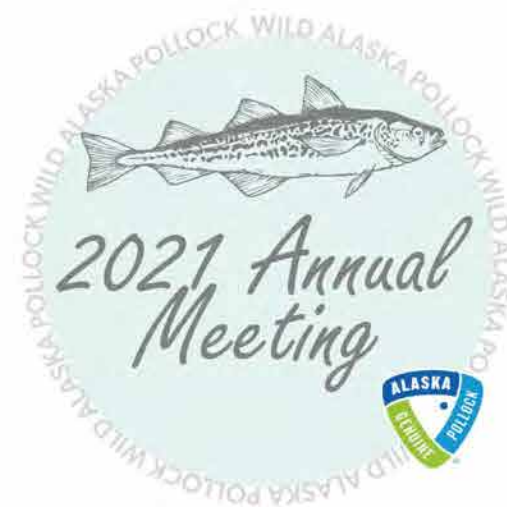
sohlae 🌊 Didn't have time to brunch on Sunday, so we're going for it today: crispy desi omelette, pumpernickel parathas, cantaloupe chaat, raitha, and turmeric potato hash! No mimosas because it's Monday and we're not monsters.



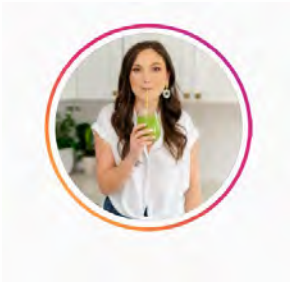
sohlae 🌊 Welcome to part 1 of the hot sauce saga! We've been waiting all year for the peppers to pop, and now it's finally time to stem, chop, and ferment our way to the best hot sauce of 2021! Read all about it in this week's newsletter. To subscribe, head over to hotdish.bulletin.com



sohlae 🌊 I spill all my shrimp cocktail secrets in the latest issue of my newsletter, Hot Dish! Not subscribed yet? Go, run, now, and make everybody's favorite appetizer! Also, why do we plate these in cocktail glasses? So unstable. I'm clearly not coordinated enough for this. 🤪🤪🤪🤪🤪🤪
hotdish.bulletin.com



Top Influencer Recommendations



@eatingbirdfood



IG: 433K followers

EG: 0.5%

% of audience 25 – 34: 55%

Brittany is a holistic nutritionist passionate about healthy cooking. She is drawn toward plant-based options but loves creating recipes around fish and leaner meats as well. Her followers consist of all types of eaters so her content is tailored to audiences with a variety of dietary preferences.



eatingbirdfood #ad Had to hop on this trend with a salmon rice salad bowl inspired by @emilymariko's salmon rice.

I used maple glazed salmon (recipe on my site) and I got all the goods I needed to make this bowl from @krogerco including the fresh salmon, romaine lettuce, cucumbers, frozen brown rice seaweed snacks and coconut aminos. 🍣🍣🍣

Definitely need to work on my chopstick skills 🤦 but this salad is sooo good. You really have to try it!



eatingbirdfood This roasted harvest bowl combines maple turmeric chicken, crisp apple slices, roasted brussels sprouts and butternut squash over a bed of greens all tossed in my apple cider vinegar dressing. It's seriously SO good and the perfect fall recipe to add to your weekly menu. 🍁🍎🥒🍷 This harvest bowl is totally customizable and great for #mealprep — just prep your veggies, chicken and dressing in advance and this dish will come together in no time!

Full recipe is linked in my bio —> @eatingbirdfood



eatingbirdfood I have such a fun and simple recipe to share with you today... **TORTILLA PIZZAS!** 🍕🌿🍓 They can be whipped up in under 15 minutes and are totally customizable. For this recipe I kept it super simple with just shredded cheese as a topping and fresh basil and red pepper flakes for garnish, but feel free to get creative here. The topping options are endless! 🙌

These personal size pizzas are perfect for a quick and easy meal or would be a fun appetizer for game day or an after school snack for kiddos. Nobody is going to complain about being served pizza, amiright?!

Head to the link in my bio to grab the full recipe!



Expanding Reach

In addition to a targeted influencer program, GAPP will activate other communications tactics to educate and inspire consumers to purchase surimi seafood.

FOOD52

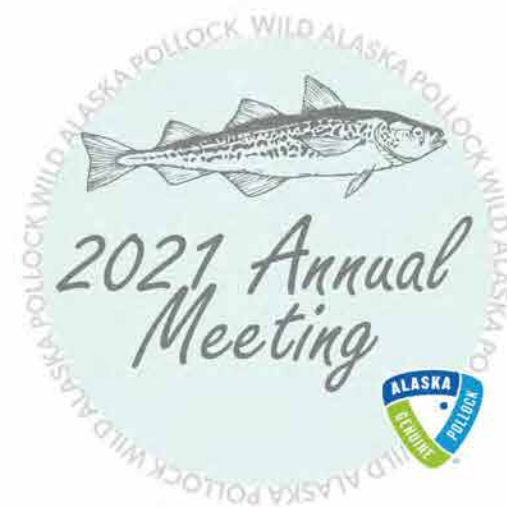
With a monthly reach of more than 25 million, Food52 is a leading innovator in the food, cooking, and home space and is partnering with GAPP to create a custom article and recipe tied to the holiday entertaining season. The partnership will take advantage of Food52's engaged online presence (both web and social).



To further support education of surimi seafood, outreach will happen to key consumer media publications debunking myths about surimi seafood and offering usage ideas in advance of the holidays. A coordinated media tour will also take place featuring CEO Craig Morris.



To capture new usage occasions, 5 unique, on-trend recipes are being developed and photographed to be used across GAPP channels including web and social.



Showing Sales Impact

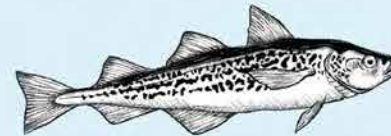
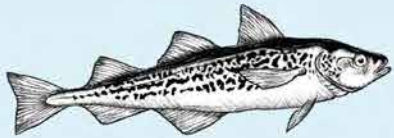
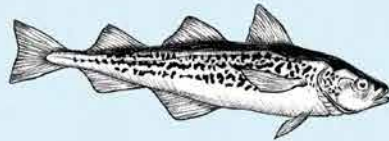
Campaign Attribution



- Connect exposure to earned media and influencers to sales.
- Demonstrate conversions and move measurement beyond impressions and clicks.



QUESTIONS?



Thank you to our Bronze Level
General Sponsor

UrnerBarry

MARKET PRICES, NEWS, AND ANALYSIS

Urner Barry is a business publisher that provides market information on the food industry to subscribers from print and non-print media. They work with much of the Wild Alaska Pollock industry to bring research to life.



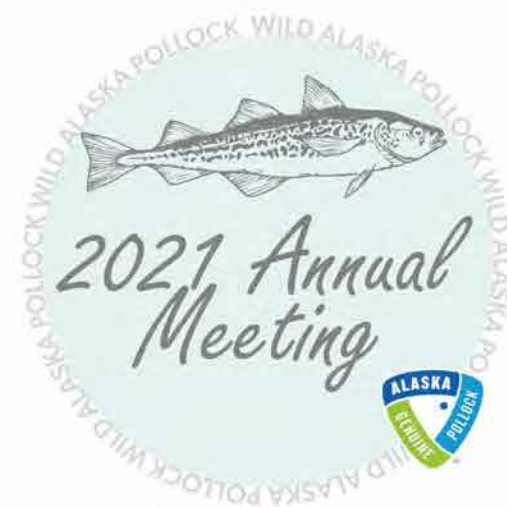
Mapping the Global Surimi Market: Urner Barry



Chris Ashley
Senior Vice President at
Urner Barry



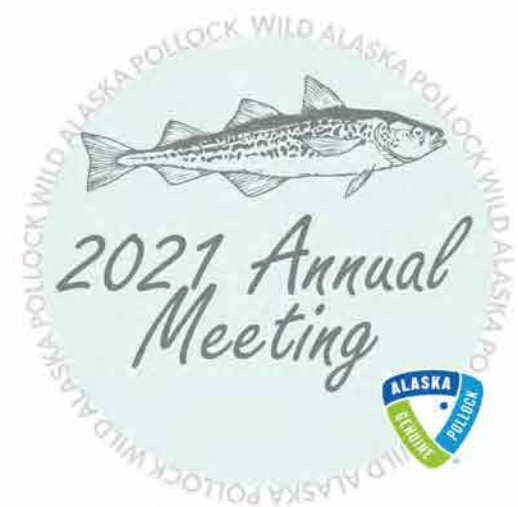
Angel Rubio
Economist at Urner Barry



Mapping the Global Surimi Market

Angel Rubio
Chris Ashley

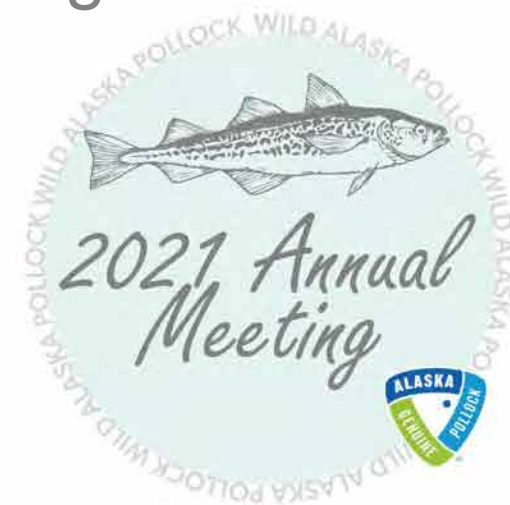
UrnerBarry
CONSULTING



About the Supply Tracker

And ways the data can be used

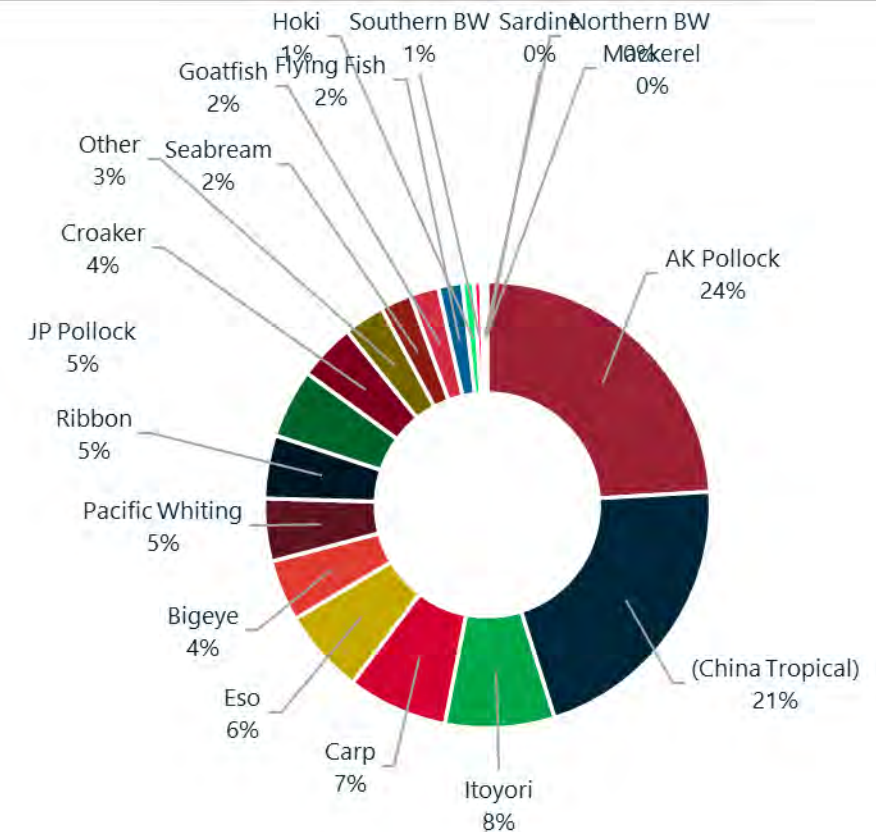
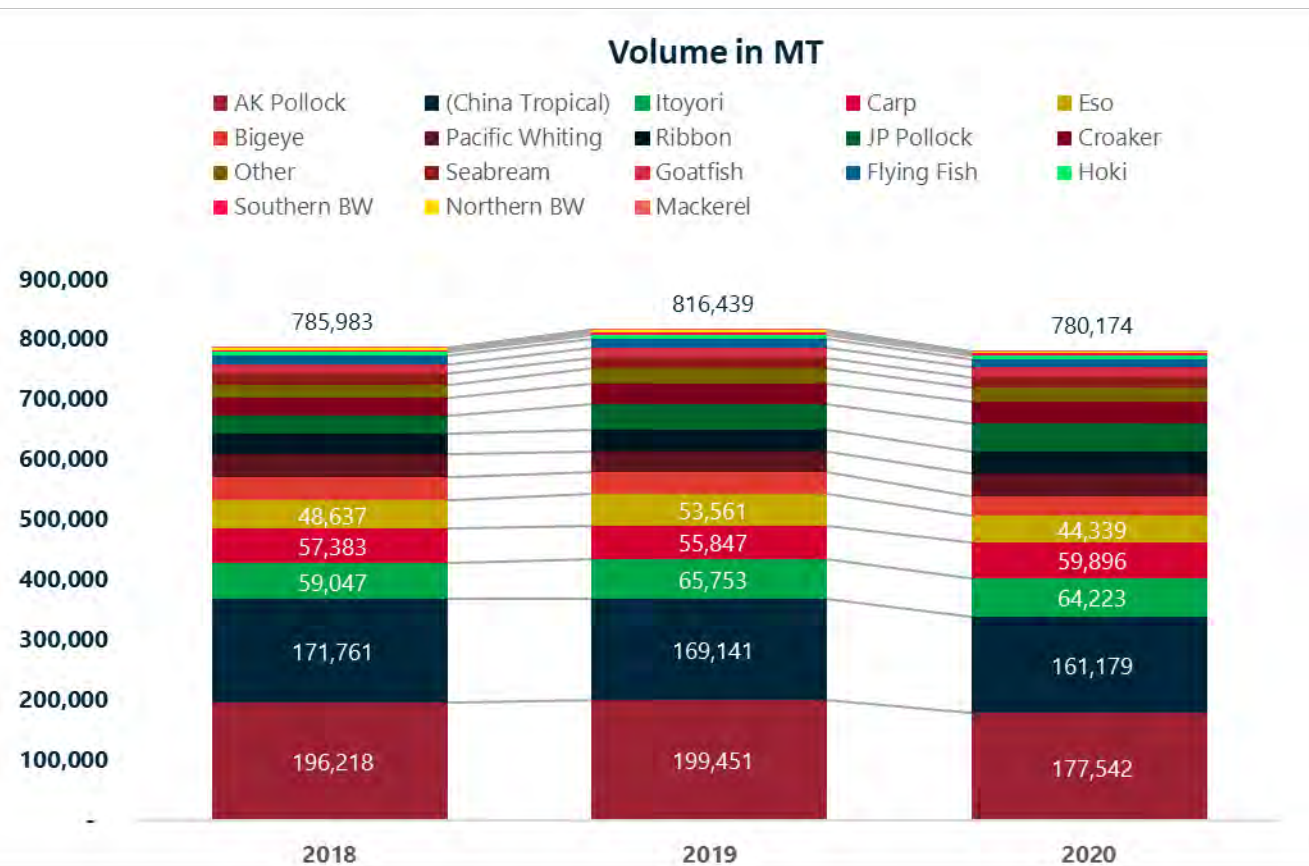
- GAPP commissioned Urner Barry Consulting create a global surimi paste supply tracking database for member use
 - Exports and imports, by country, by species
- Adapting previous work and estimates from the GAPP working group
- How can the data be used? –some examples and findings
 - Production
 - Trade
 - Trade prices (trends)



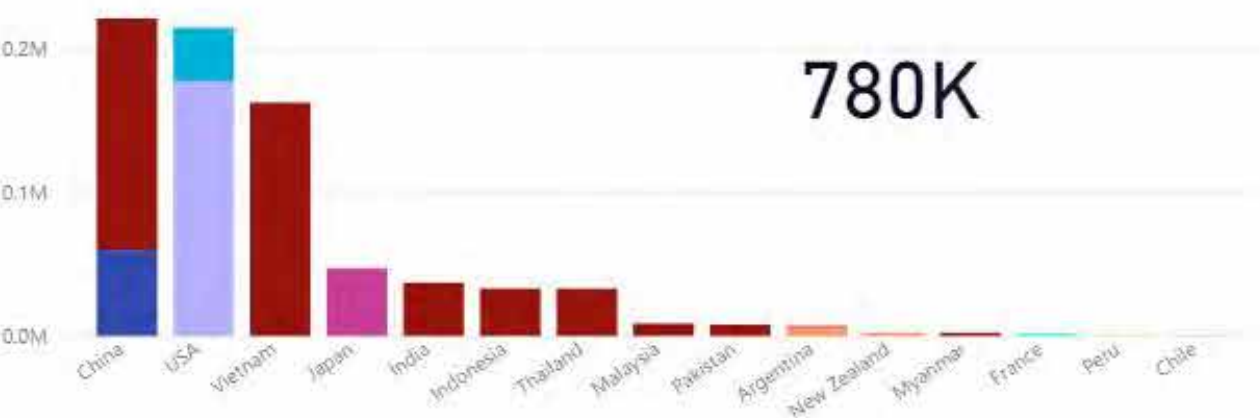
Global Surimi Production figures

Each species' estimated share

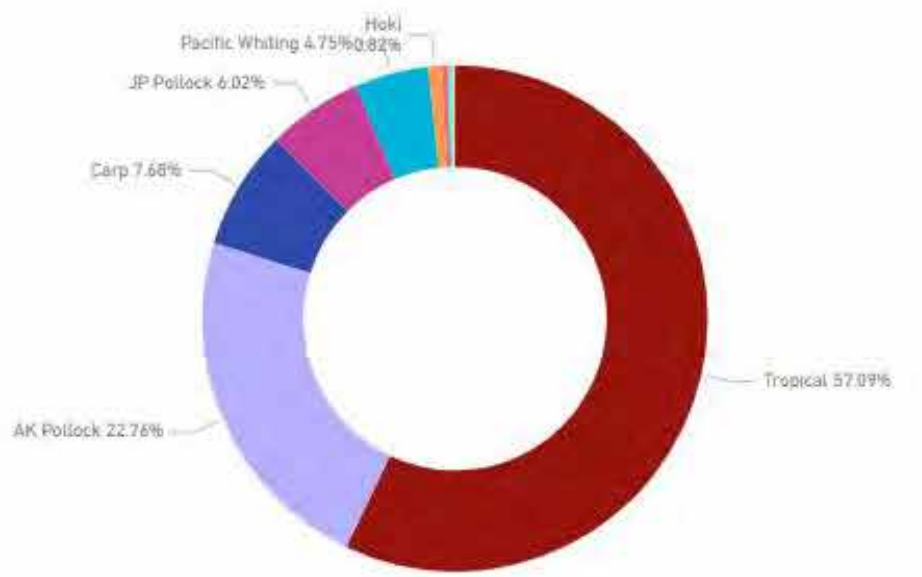
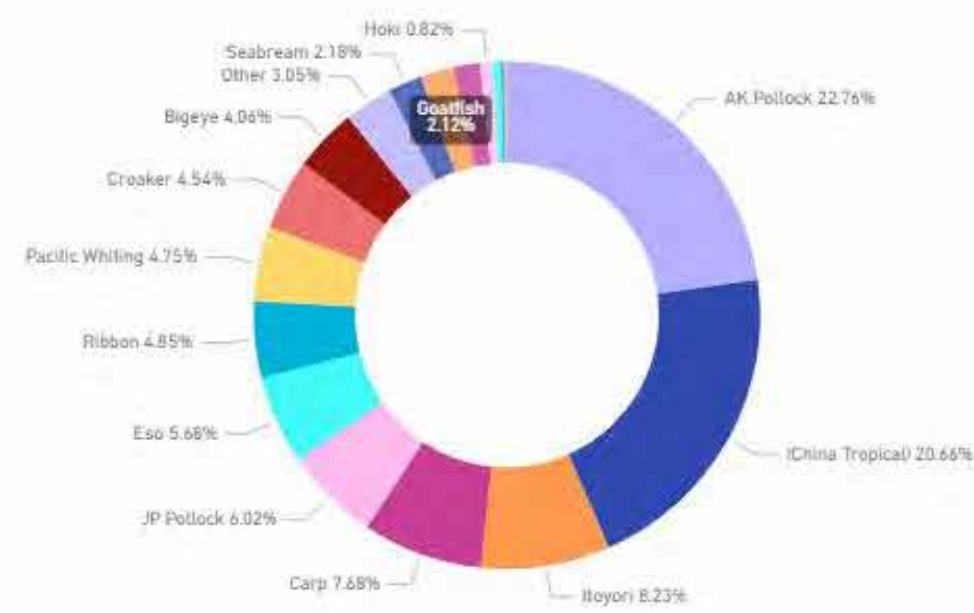
- On average, AK Pollock surimi represents 25 percent of the global supply (2018 – 2020)—give or take



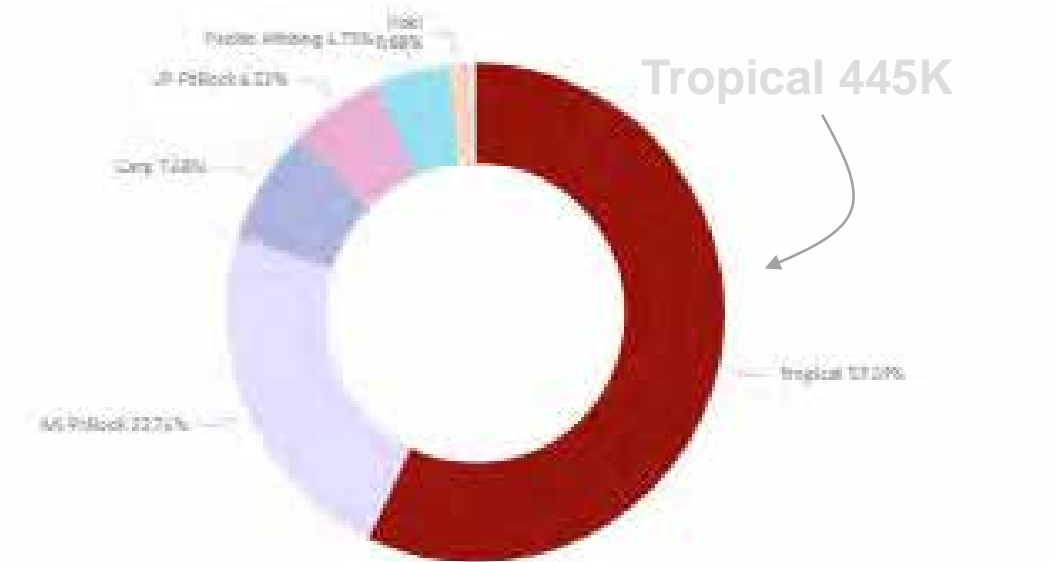
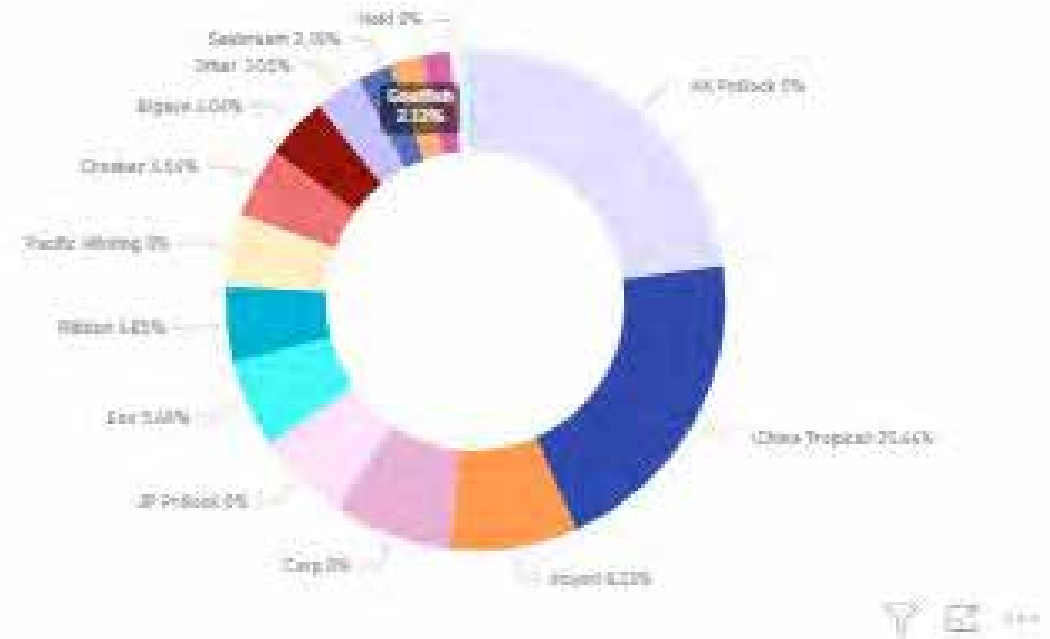
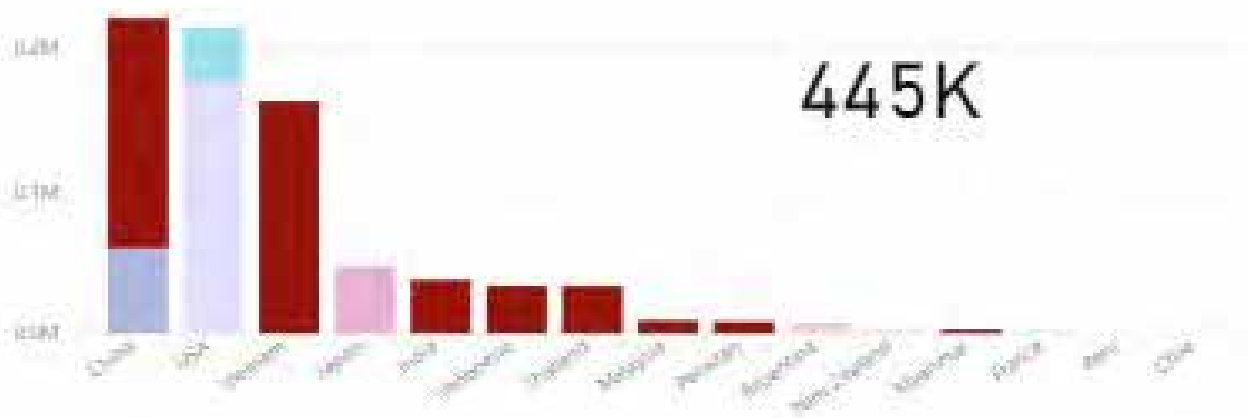
Mapping Surimi Production



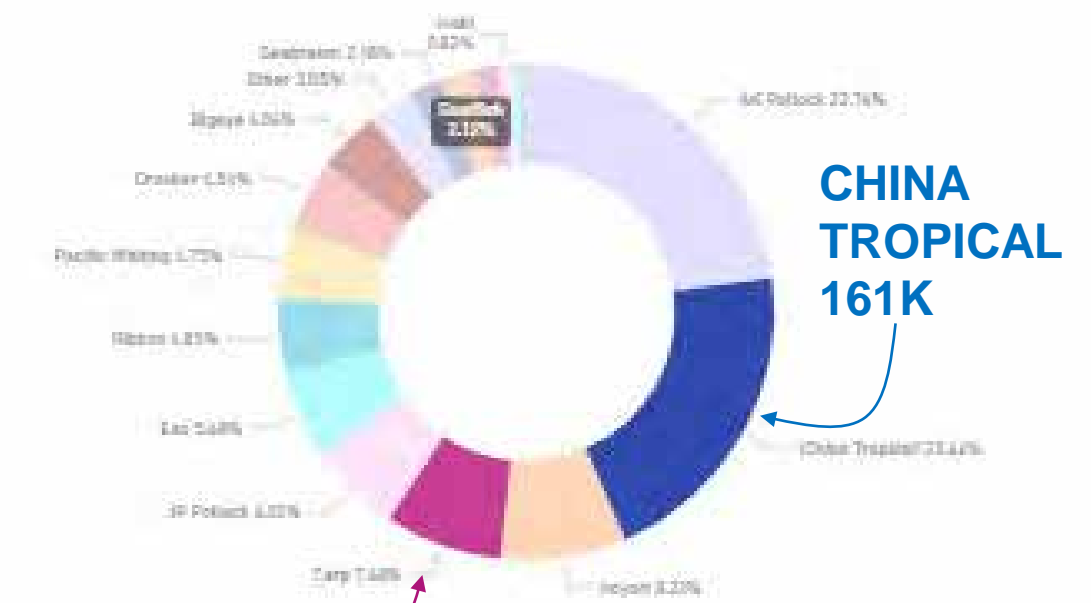
780K



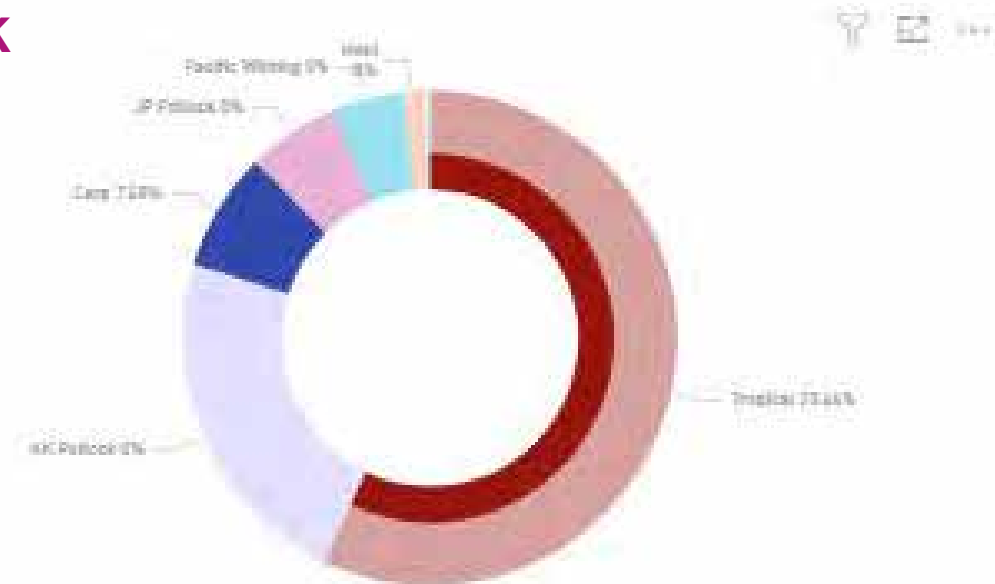
Mapping Surimi Production



Mapping Surimi Production



CHINA CARP
60K

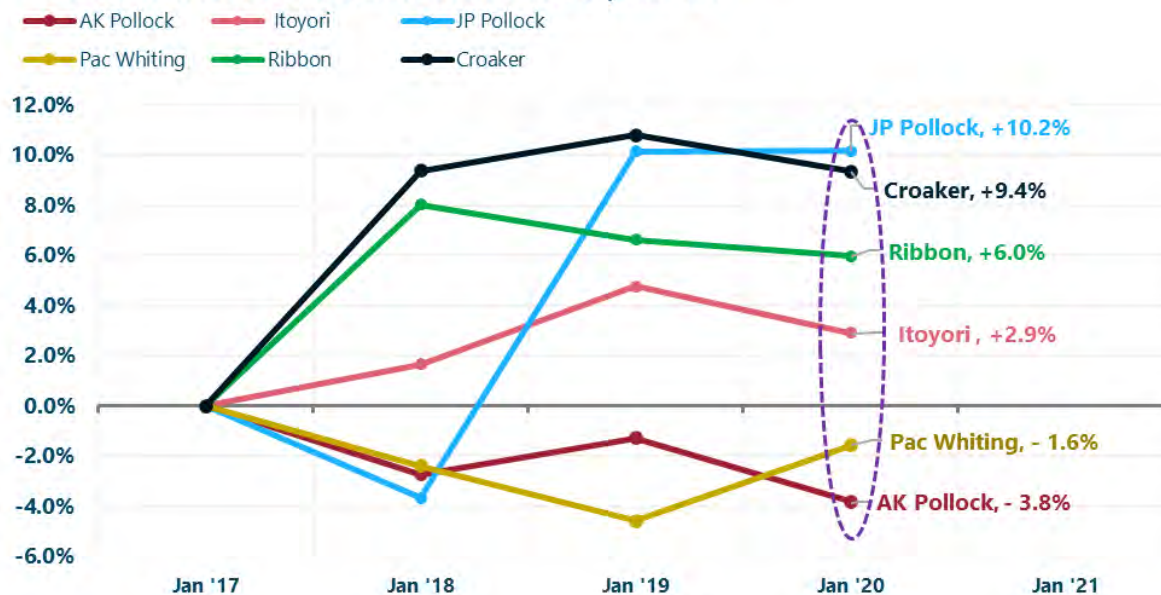


AK Pollock surimi production vs. other species

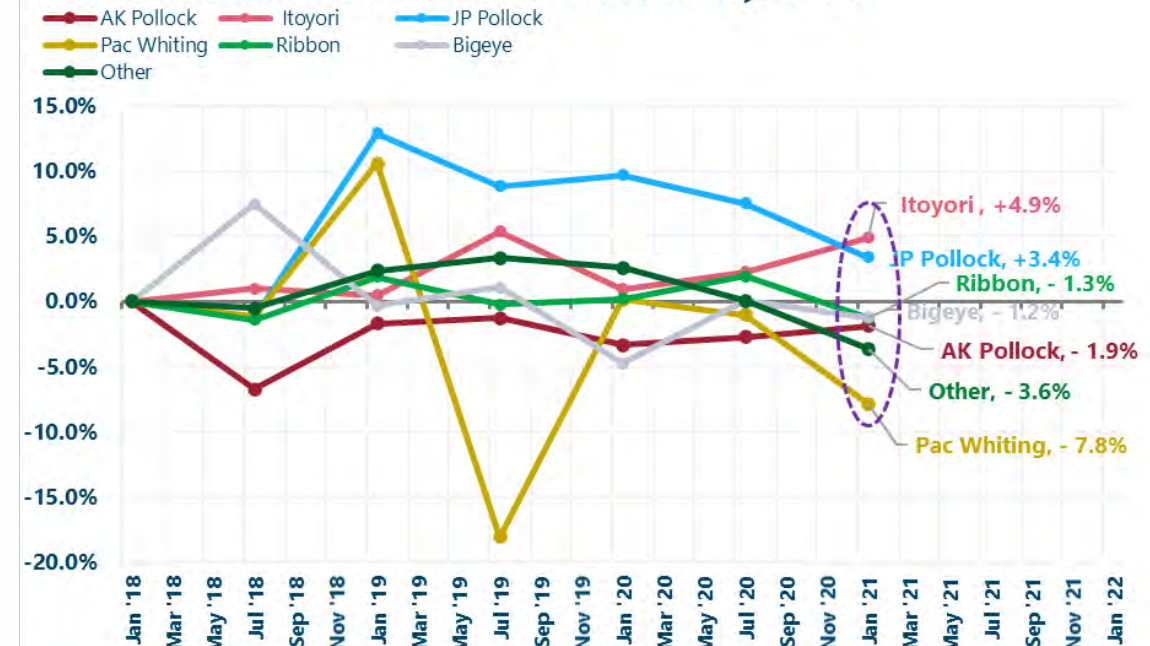
Itoyori's upward trend since '18, JP Pollock

- Production has ramped up for key species
 - Since 2017, Japanese Pollock surimi production grew 10% (CAGR, 4 years, in 2020)
 - AK Pollock surimi contracted less than 5% during the same period (CAGR, 4 years, in 2020)
- On a semi-annual basis since 2018, Itoyori surimi (AK Pollock immediate substitute in Japan) **holds a positive trend**, while most of the other larger-scale produced species, show a downward trend
 - Since 2018, AK Pollock surimi production is still negative, despite an upward trend noticed over the last 12 months

Annual Production CAGR since Jan '17



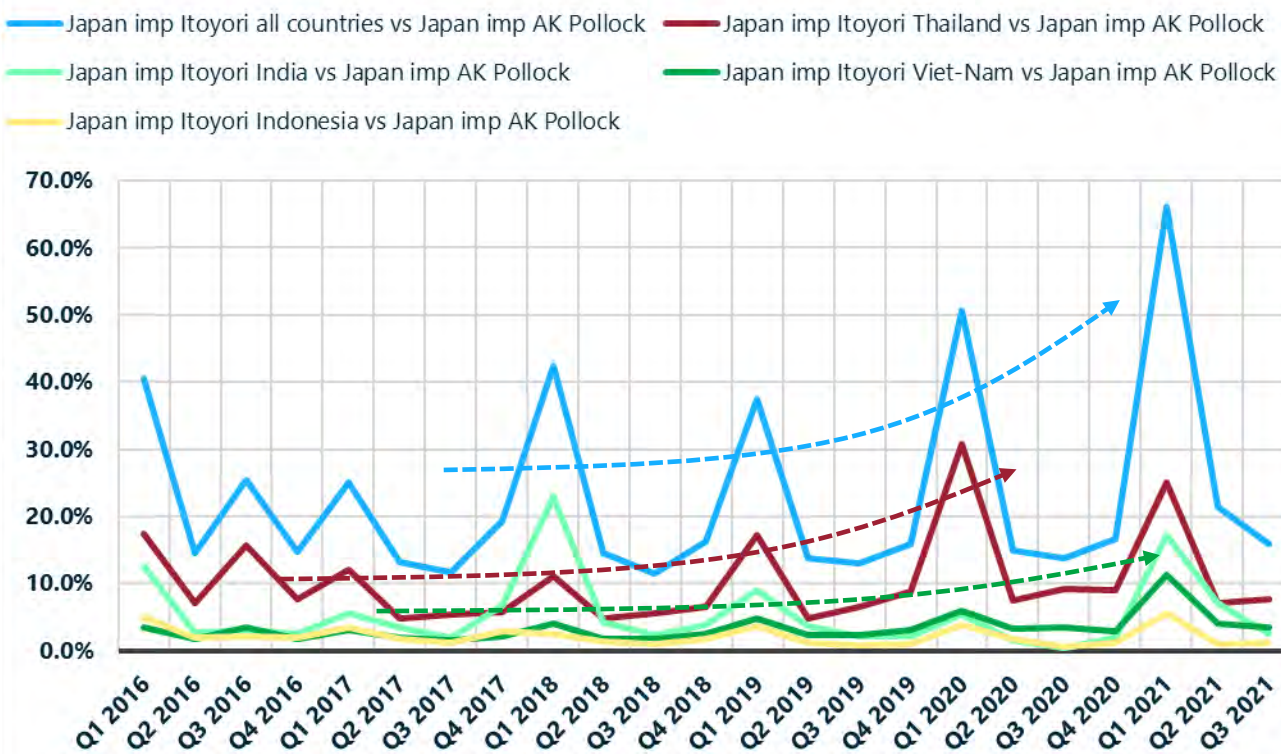
Semi-annual Production CAGR since Jan '18



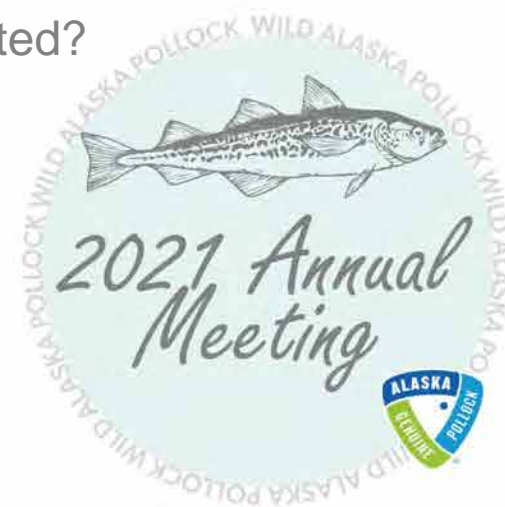
Japan as a market:

Other species gaining share relative to AK Pollock

Import Comparison



- Japanese imports of Itoyori relative to AK Pollock surimi
 - Growing trend from all countries relative to AK Pollock
 - Including Thailand
 - Including India, with significant hiccups during 2020 (pandemic)
 - Vietnam
 - Indonesia
- Could this be price related?

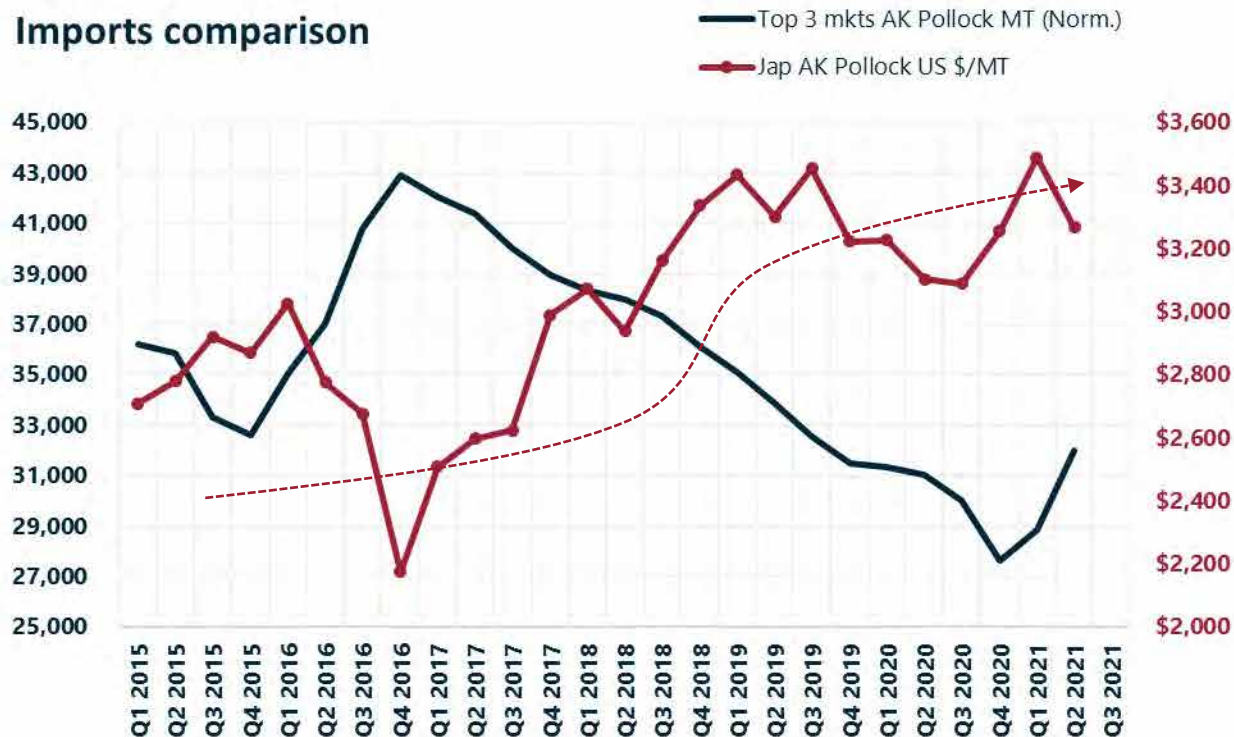


Price Comparison (using trade data)

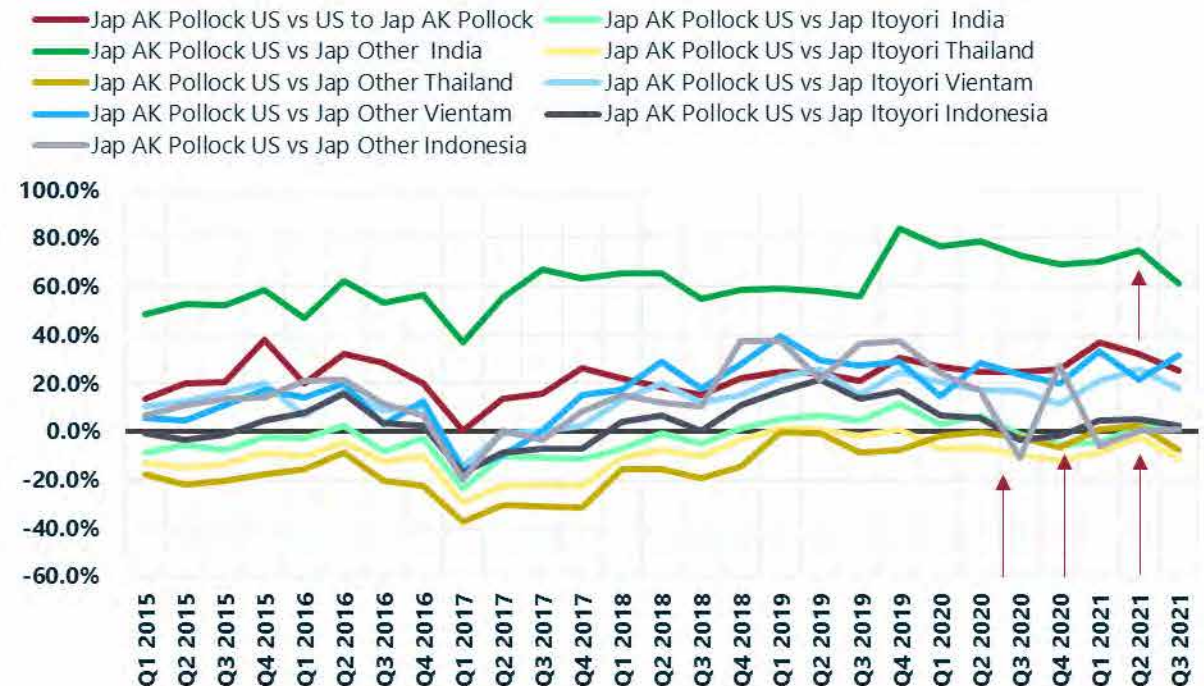
Overall prices of AK Pollock moving up relative to other species

- Prior to the pandemic, AK Pollock surimi experienced the largest price increase since 2015, on a quarterly basis
 - On average, CAGR of the price of AK Pollock surimi to Japan has increased 0.40% quarterly since January 2015 (27 quarters at 0.40% ! --in nominal terms)
 - Price vs. Smoothed AK imports from top 3 countries
- During the pandemic, Prices of Itoyori from Indonesia, and “other” species, also moved up considerably—shaving off some of the premium.

Imports comparison



Relative premium of AK Pollock



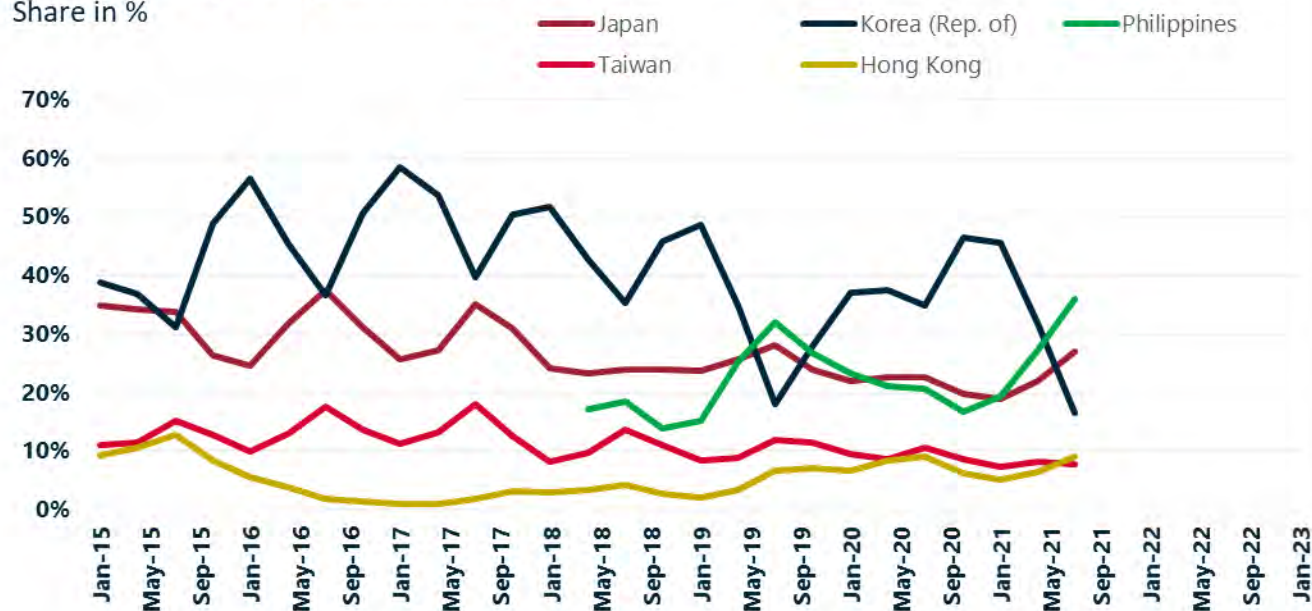
Importers from China

Main markets, and seasonality

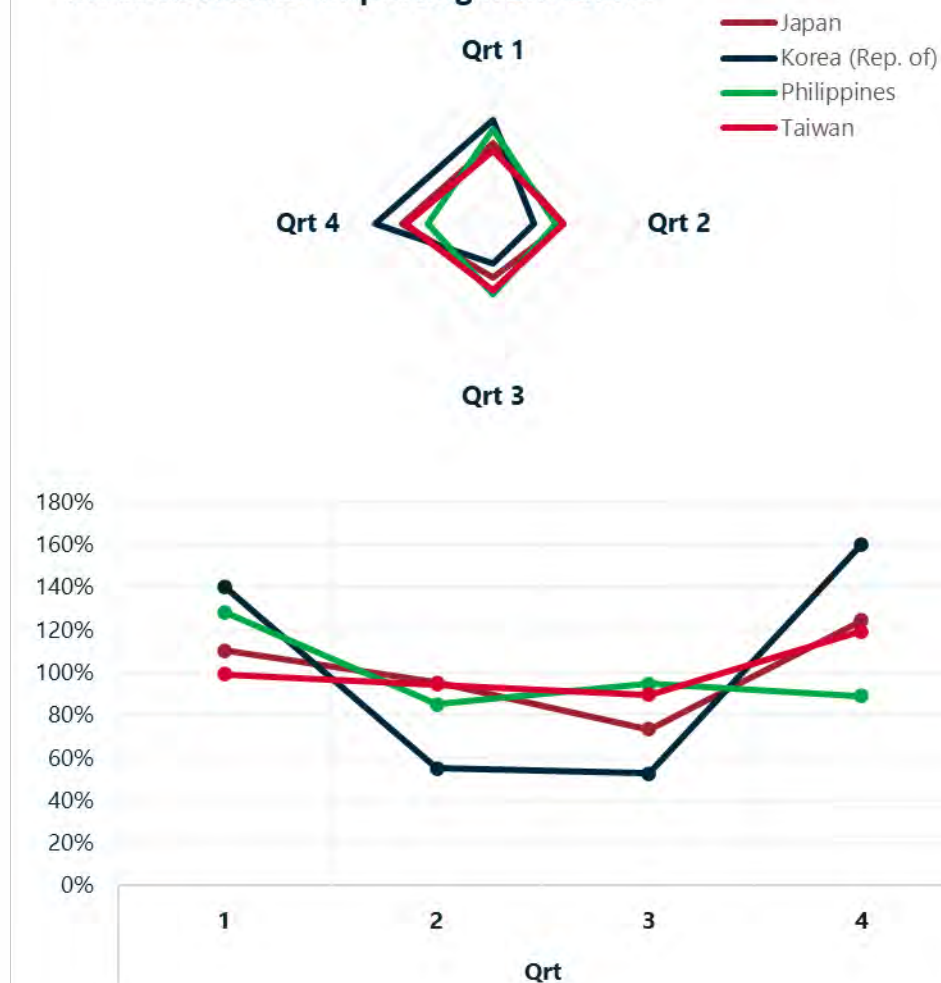
- Philippines is becoming an important importer of Chinese surimi
- South Korea's imports of Chinese surimi is trending downward
- Seasonality is key, with most imports (from declaring countries) taking place in Q4 and Q1

Countries importing surimi from China

Share in %



Seasonal Factor importing from China

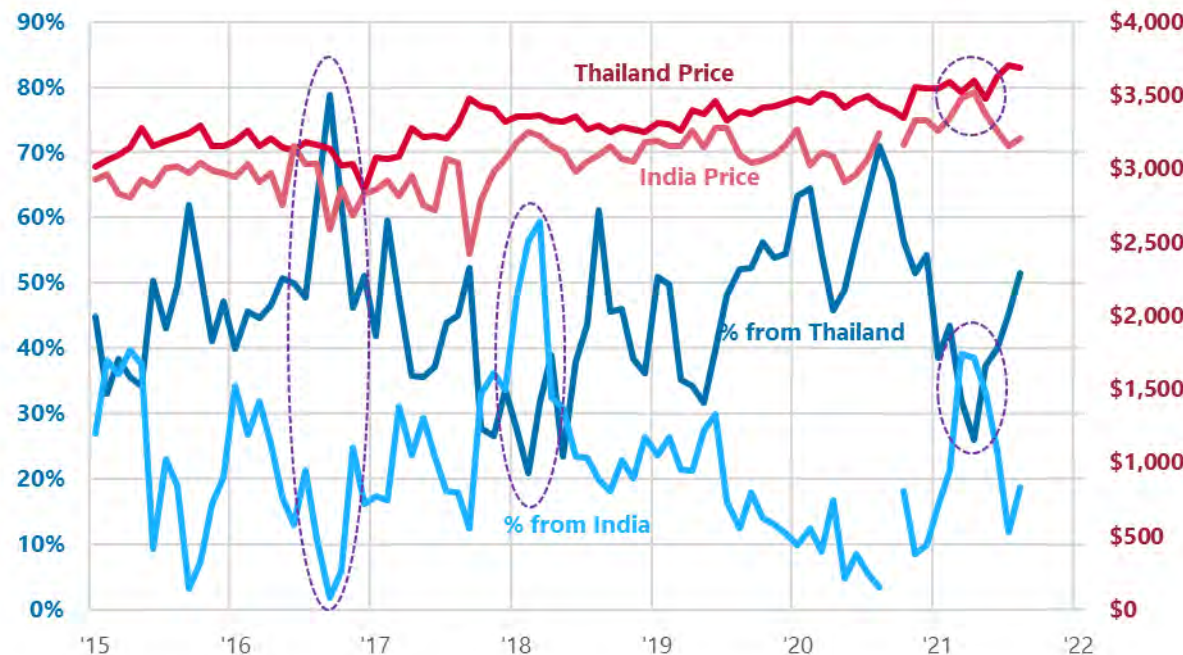


Seasonality drives Japanese sourcing of Itoyori

Thailand, India, Vietnam

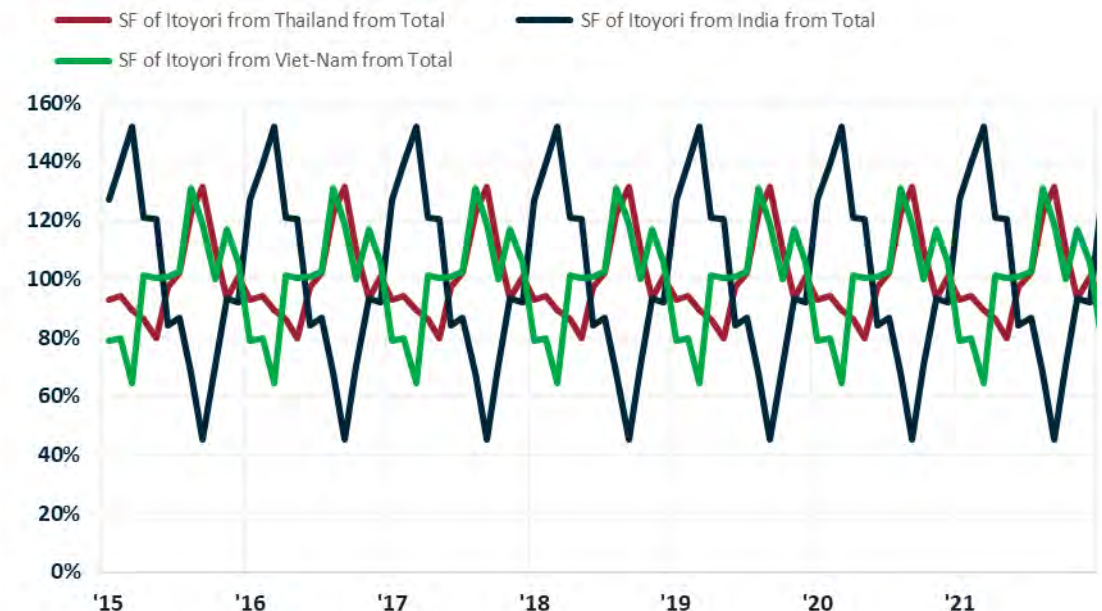
Japan:

- Itoyori to Japan appears to be a battle between India and Thailand and increasingly Vietnam (not pictured)
- Thailand receives a premium over Indian price
- Peak season of one, low-season for the other



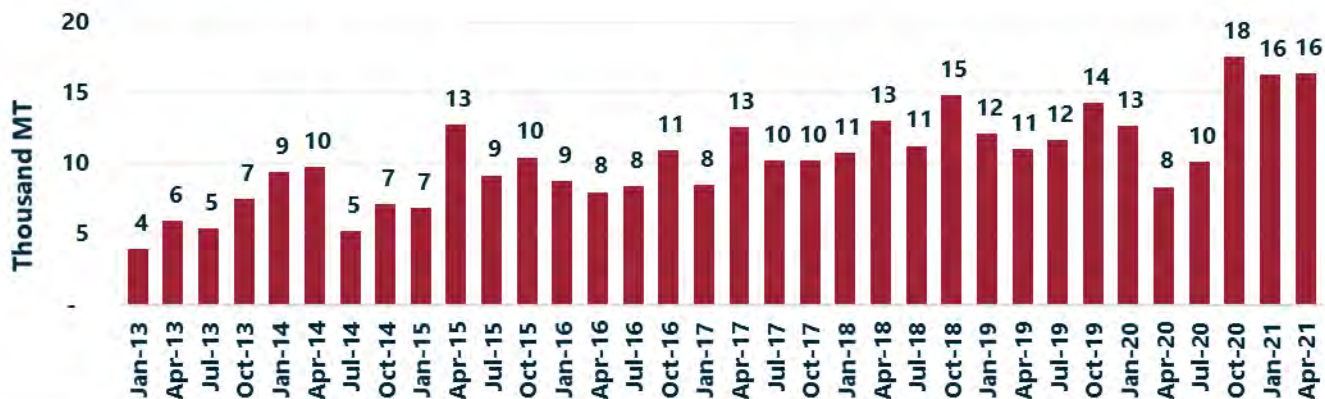
- Indian surimi exports to Japan follow a regular seasonal pattern, and any disruption in these could trigger demand from other supplying countries:
 - Thailand
 - Vietnam
- **And it will likely be in off-season, impacting prices as a result**

Seasonal Factor (Japan imports)



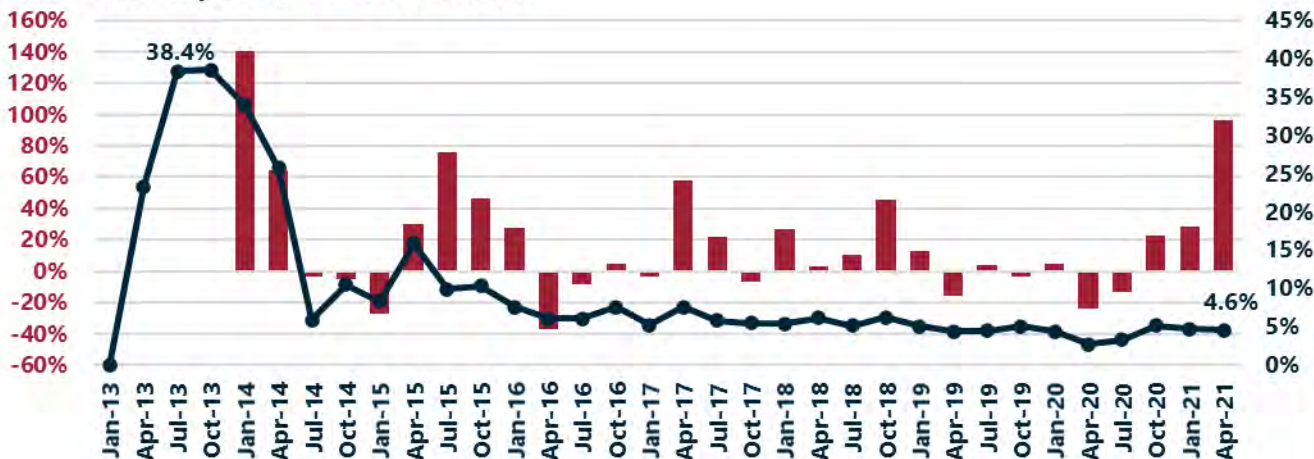
Thai imports of surimi paste have steadily increased, potentially due to domestic production challenges

Thailand Imports

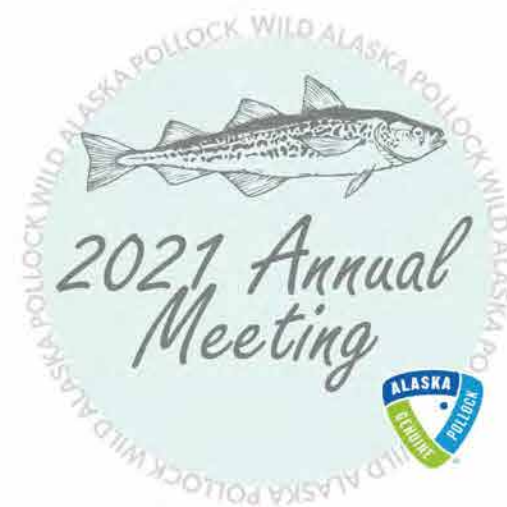


- It is clear Thailand is importing more surimi year-over-year
- Exports have also moved lower, overall
- If these two are a function of production, then our estimates suggest:
 - On average, for every 1% DECREASE in production, imports increase by 3.5 (data since 2013, on a quarterly basis)
 - On average, for every 1% DECREASE in exports, production DECREASES 0.96% (nearly 1 to 1)

Thailand Imports, Y-o-Y vs. CAGR

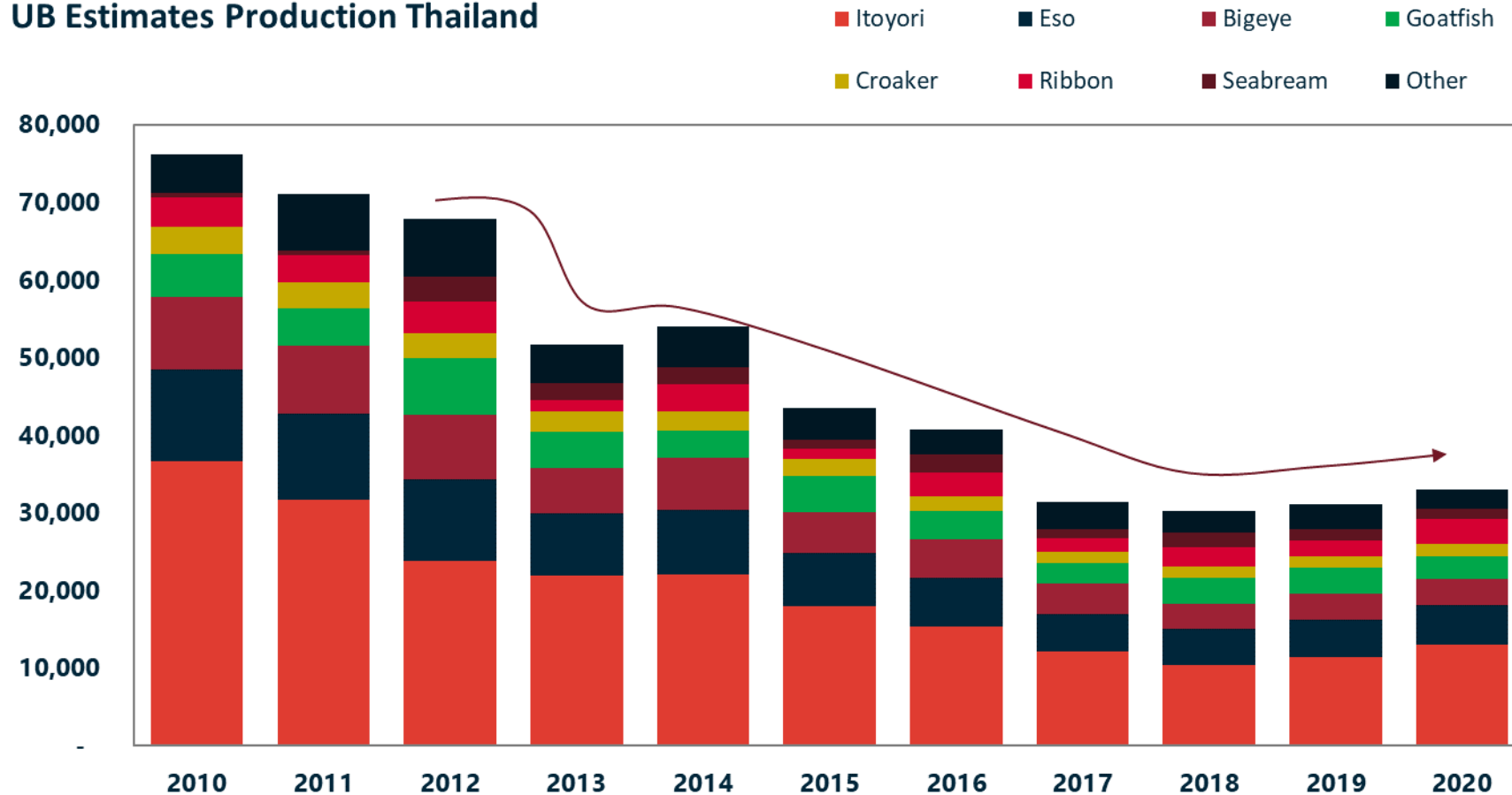


Imports have been growing on average 6% quarterly since 2015



Production Decrease from Thailand over the years seems to be driving the import increases

UB Estimates Production Thailand



- Imports are compensating for the drop in domestic surimi paste production



Contact, Resources:

- Access to the Surimi Supply Tracking reports and database is free to all GAPP members
- Custom analyses like today's are also available to GAPP members
 - Just reach out to GAPP staff to request approval to use the pre-paid analytical budget
- Non-members can contact Urner Barry directly for access via subscription or ad hoc analyses

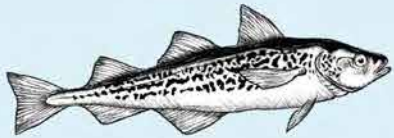
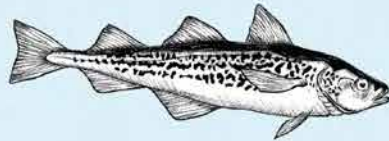
Angel Rubio

(Cell & Whatsapp): 201-921-2664

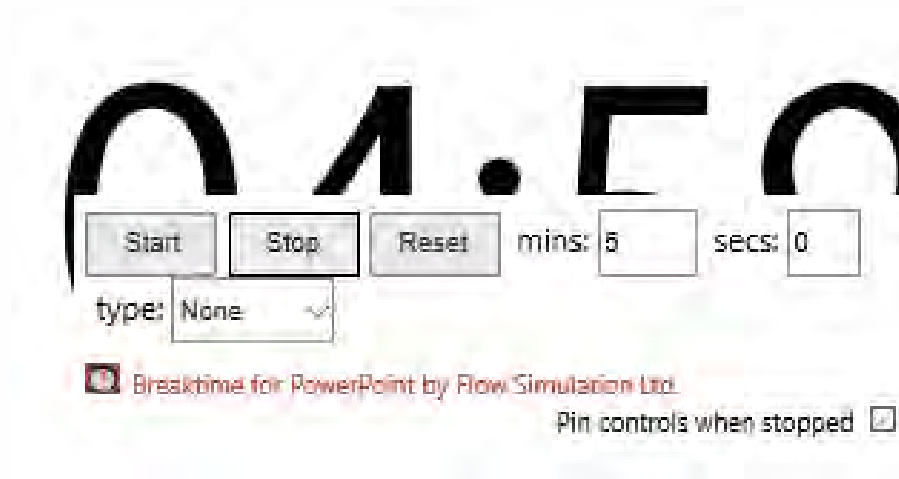
arubio@urnerbarry.com



QUESTIONS?



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Edelman



NEPTUNE

Ketchum
empathy + intelligence



UrnerBarry
MARKET PRICES, NEWS, AND ANALYSIS

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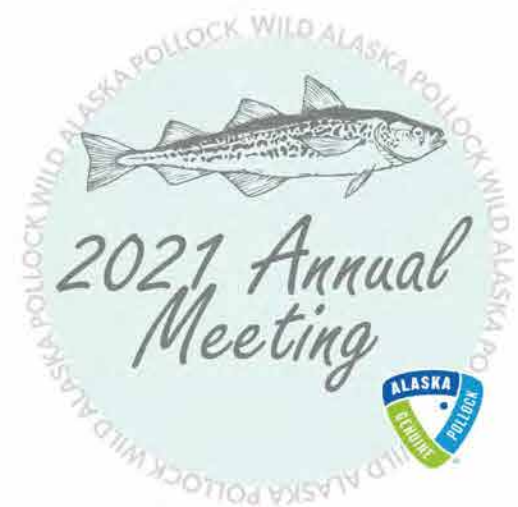
UniSea delivers high-quality products and services to the Wild Alaska Pollock industry through processing, shipping, storing, and hosting industry leaders.



Keynote Speaker: Nancy Fuller



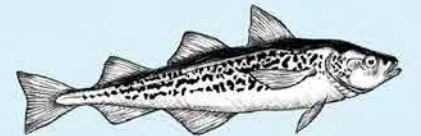
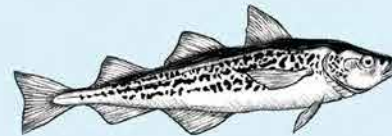
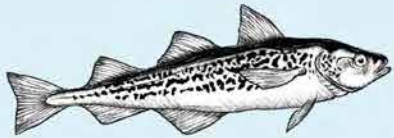
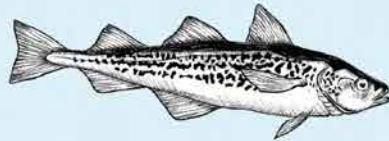
Nancy Fuller
Food Network Celebrity Chef



Keynote Speaker: Nancy Fuller



QUESTIONS?



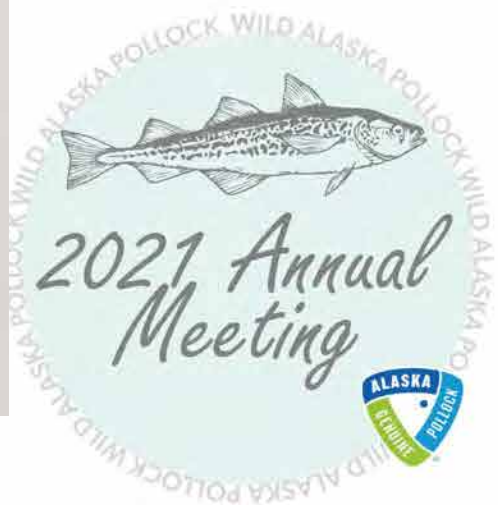
Beyond Surimi: Other Opportunities for Wild Alaska Pollock

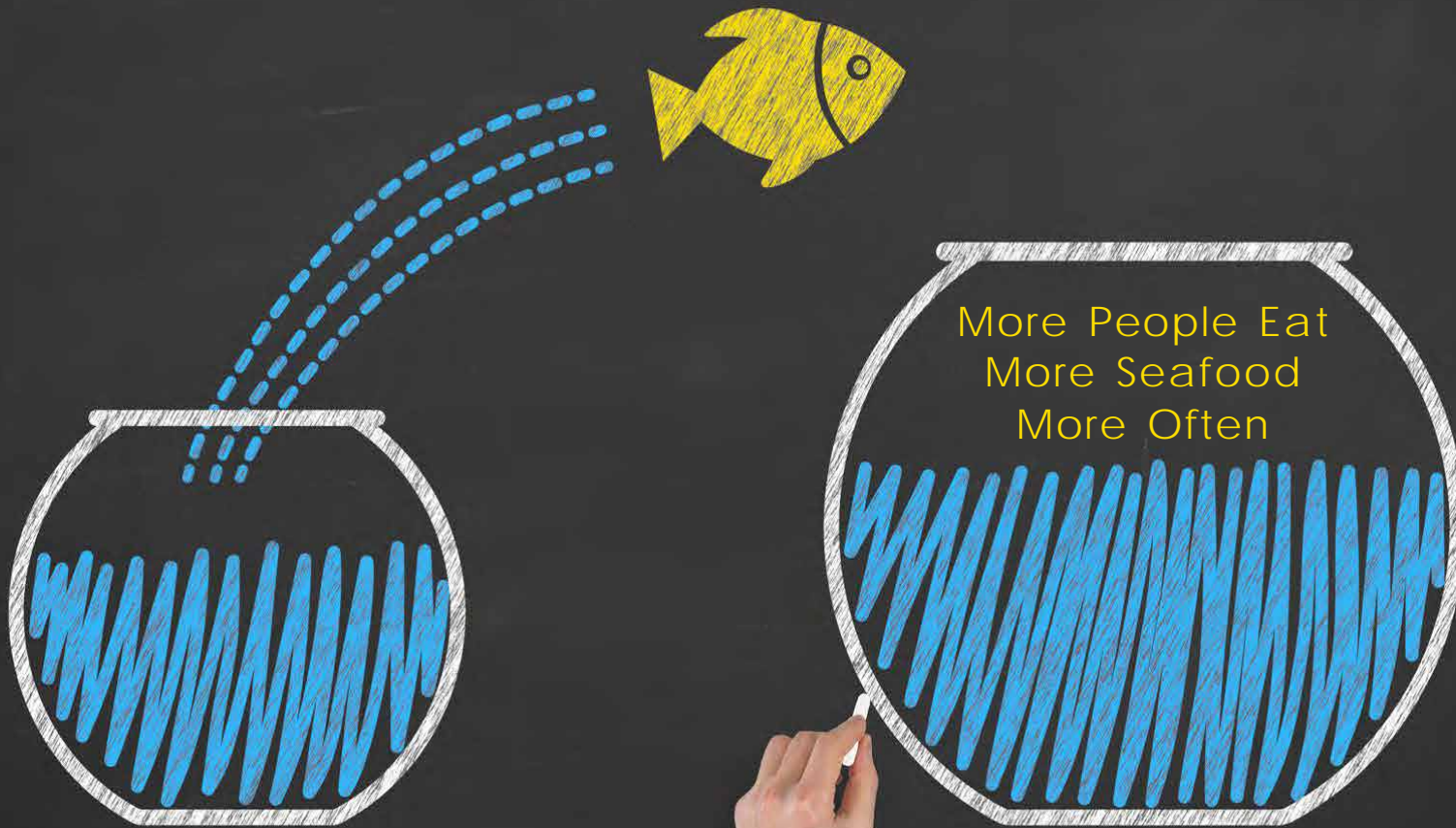


Arlin Wasserman
*Founder and Managing Director of
Changing Tastes*



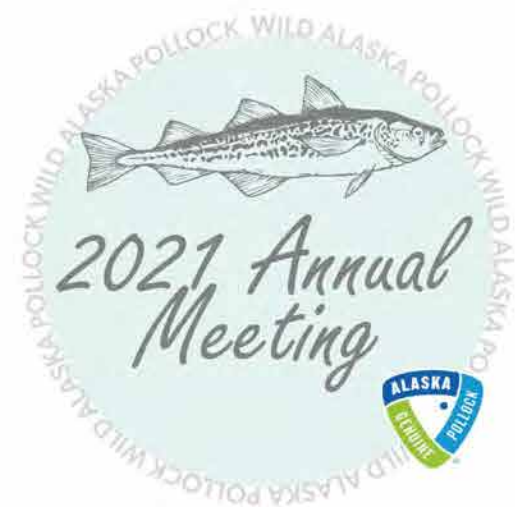
Wouldn't it be great if sustainable seafood from American waters made up a larger share of the American diet?





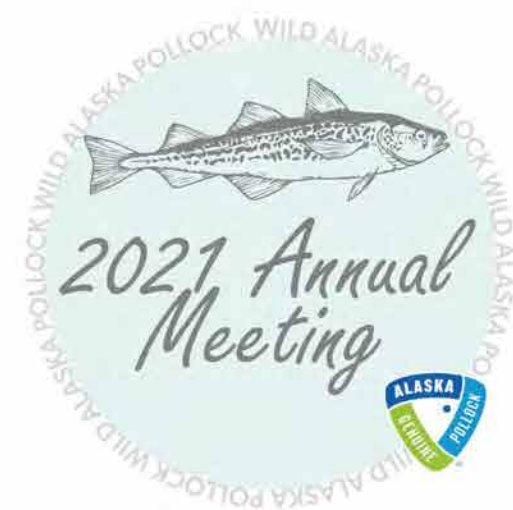
More People Eat
More Seafood
More Often

Aka increase consumption by 80%

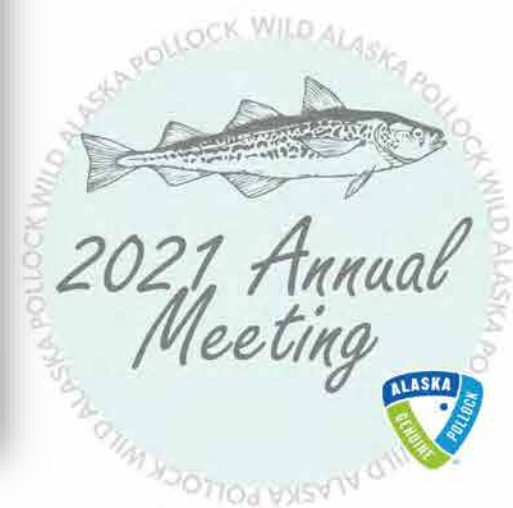


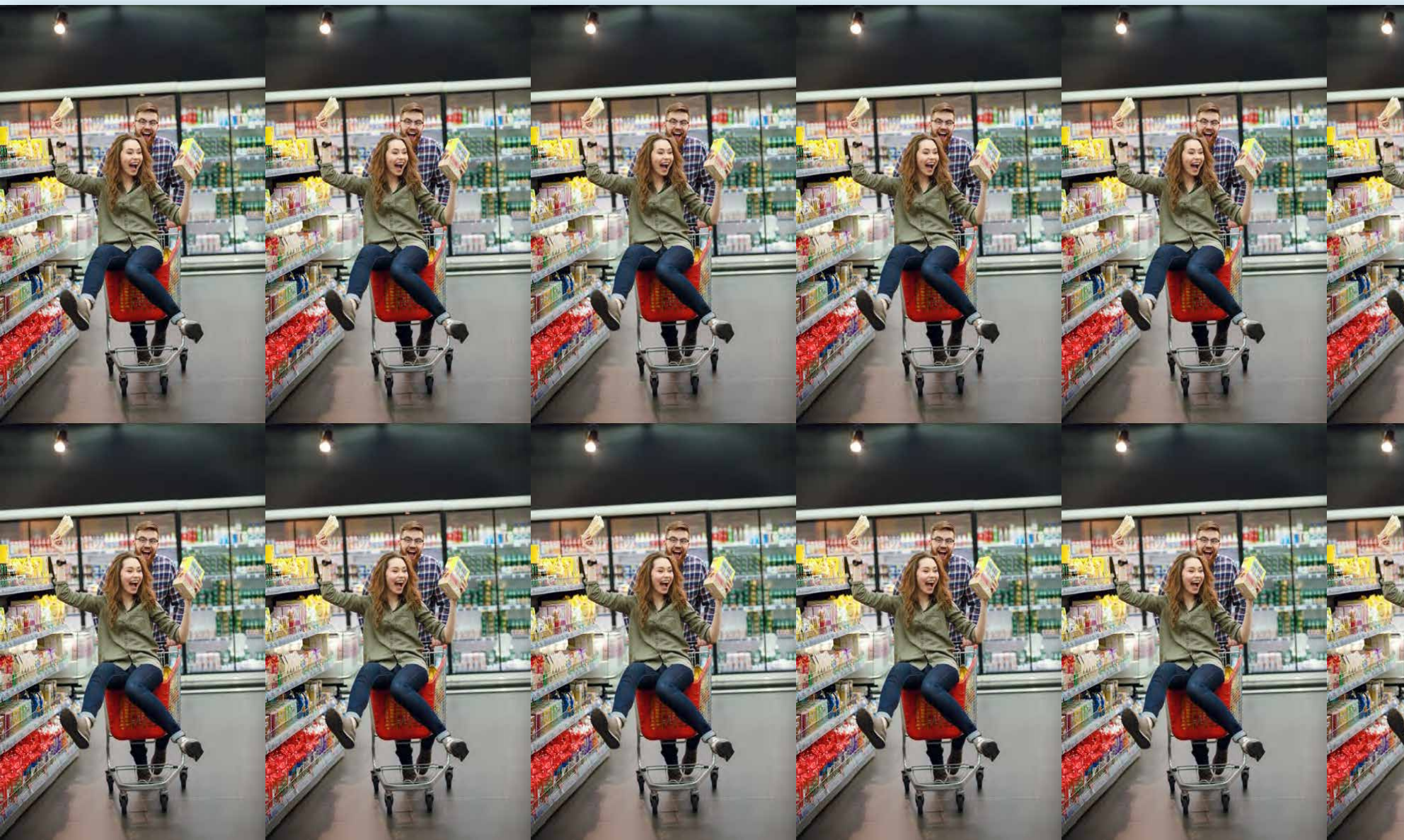


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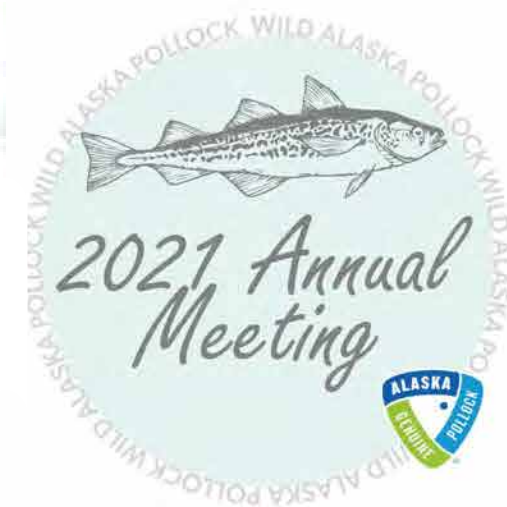
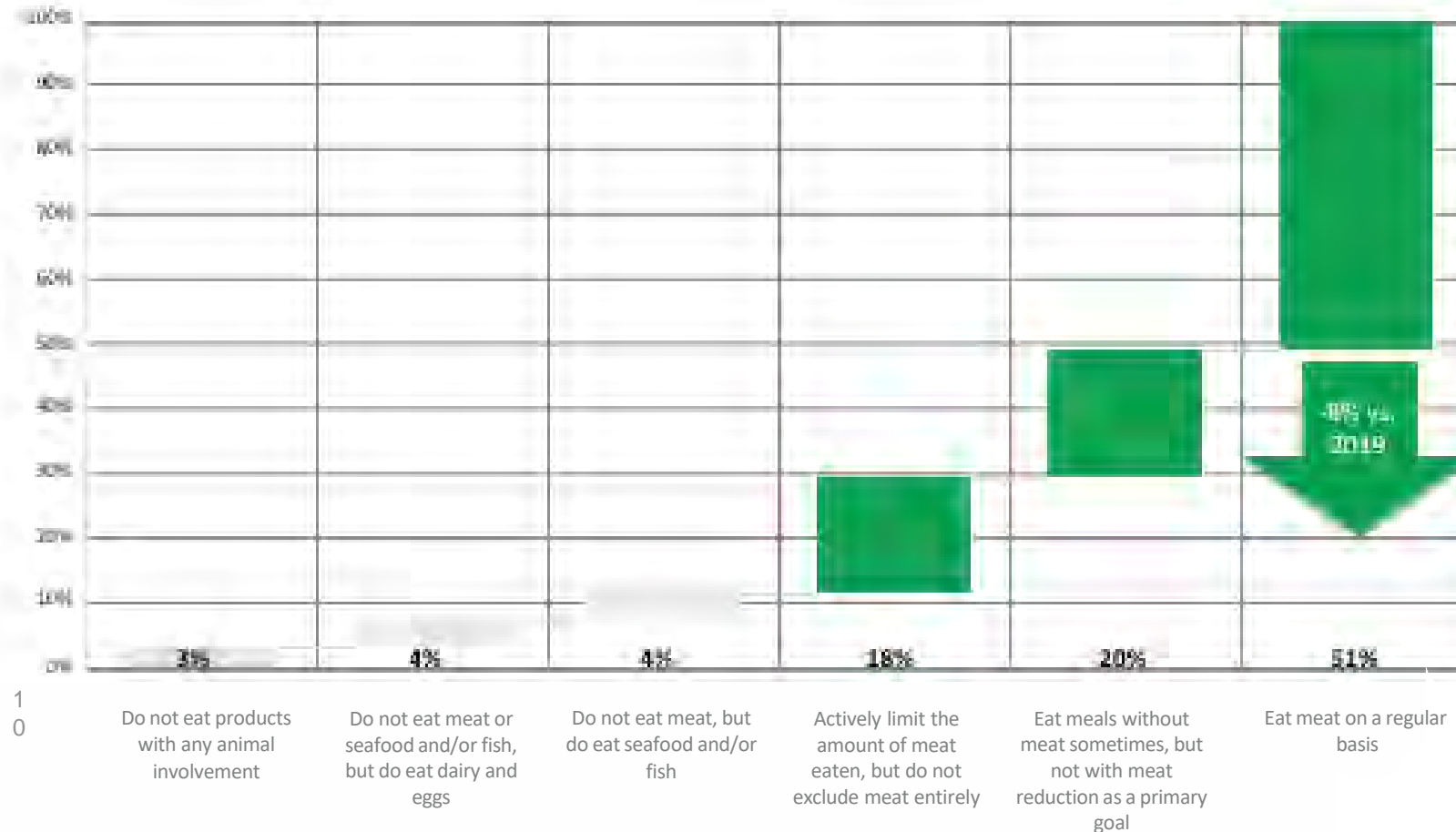




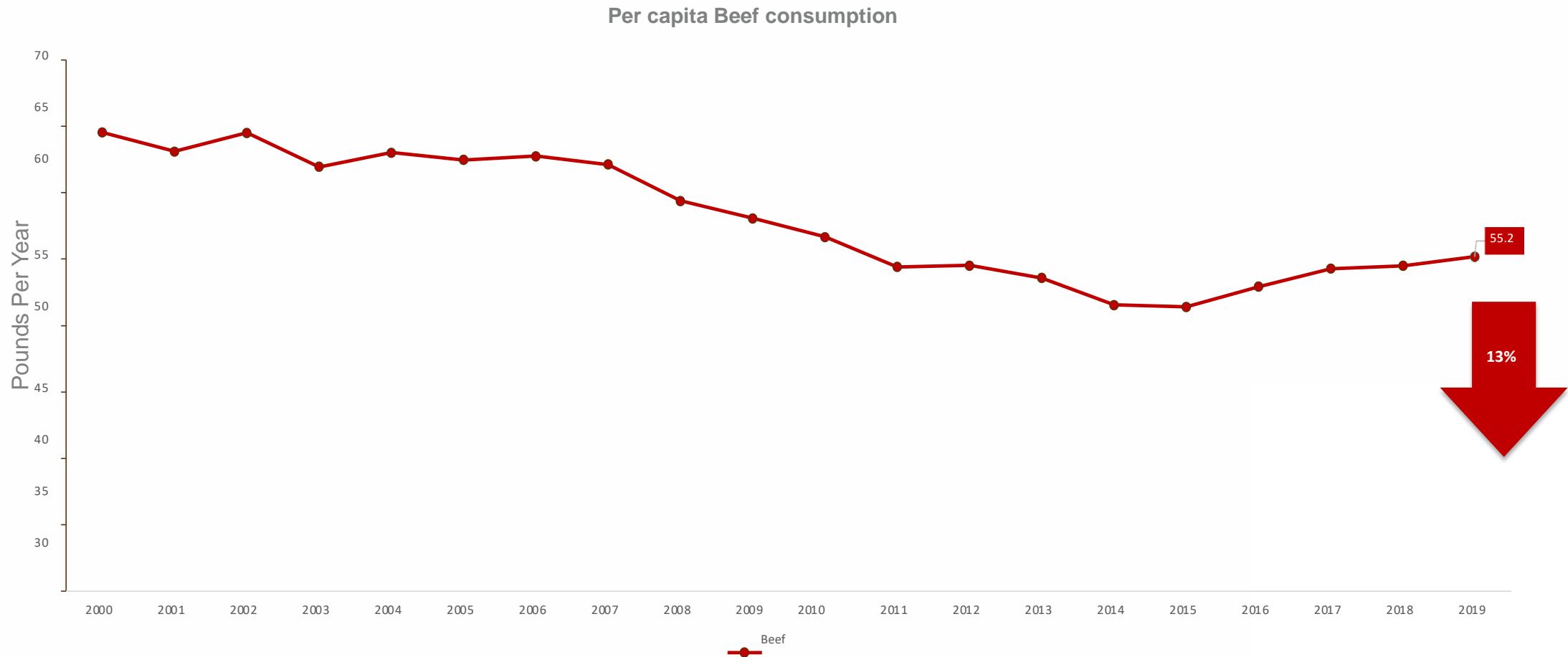
Americans want to change what we eat

Consumers are substantially interested in eating less red meat.

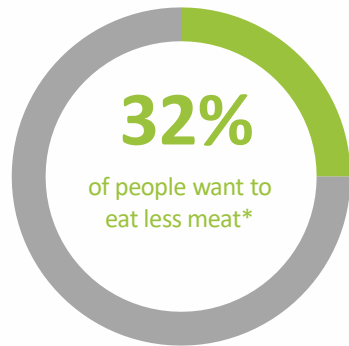
That's also been true before and as well as during the later stages of COVID.



That change is lasting and substantial



Many consumers want to eat less meat and replace it with seafood or poultry



MOST APPEALING WAY TO EAT LESS MEAT

vs. 2019

Replace meat with fish / seafood	39%	-8%
Replace meat with poultry	35%	-6%
Include smaller portions of meat within meals	34%	-13%
Replace meat with plant-based foods	32%	-5%
Go meatless for certain meals	28%	0%
Go meatless certain days of the week	23%	-3%
Try vegetarian meat alternatives	22%	-1%
Go completely meatless	12%	2%

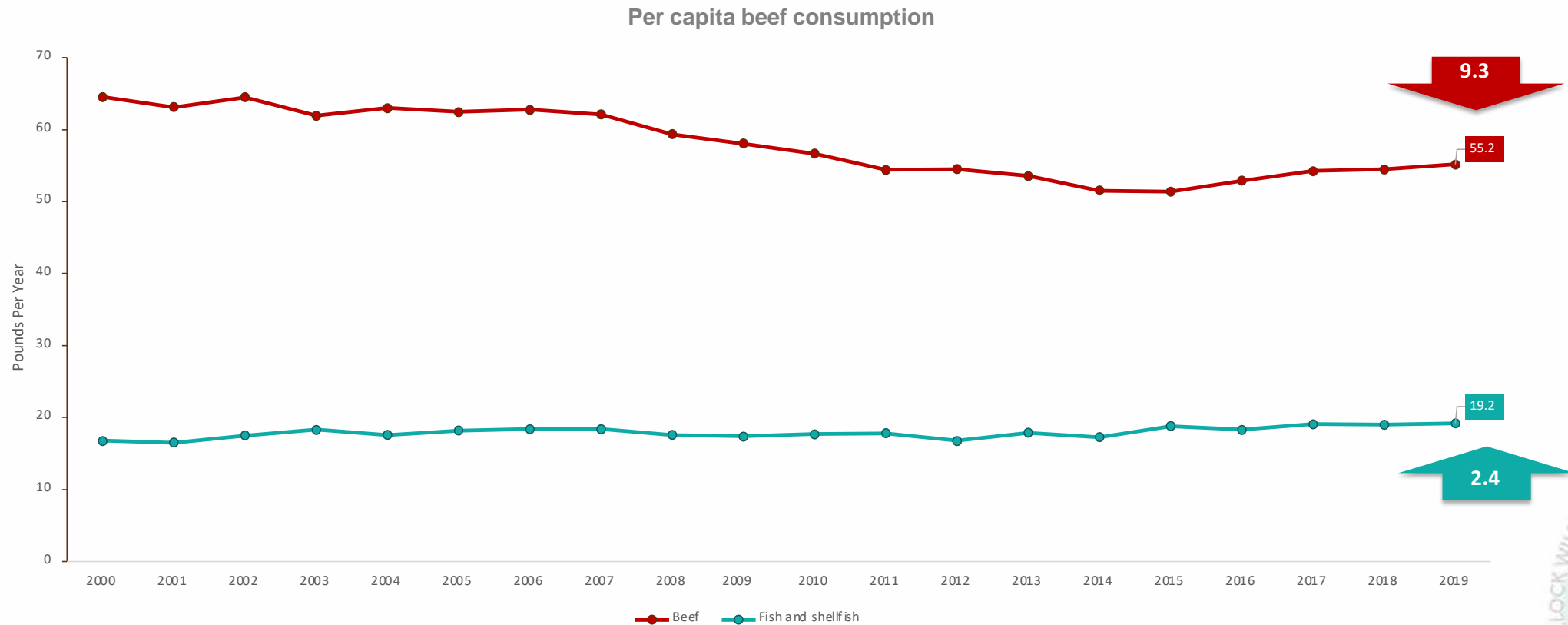
*Meat includes beef, lamb, pork, ham, and sausage



Fish consumption is up...we've all seen this!

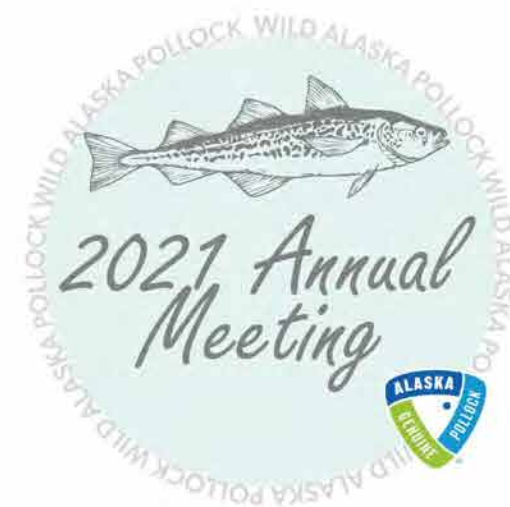
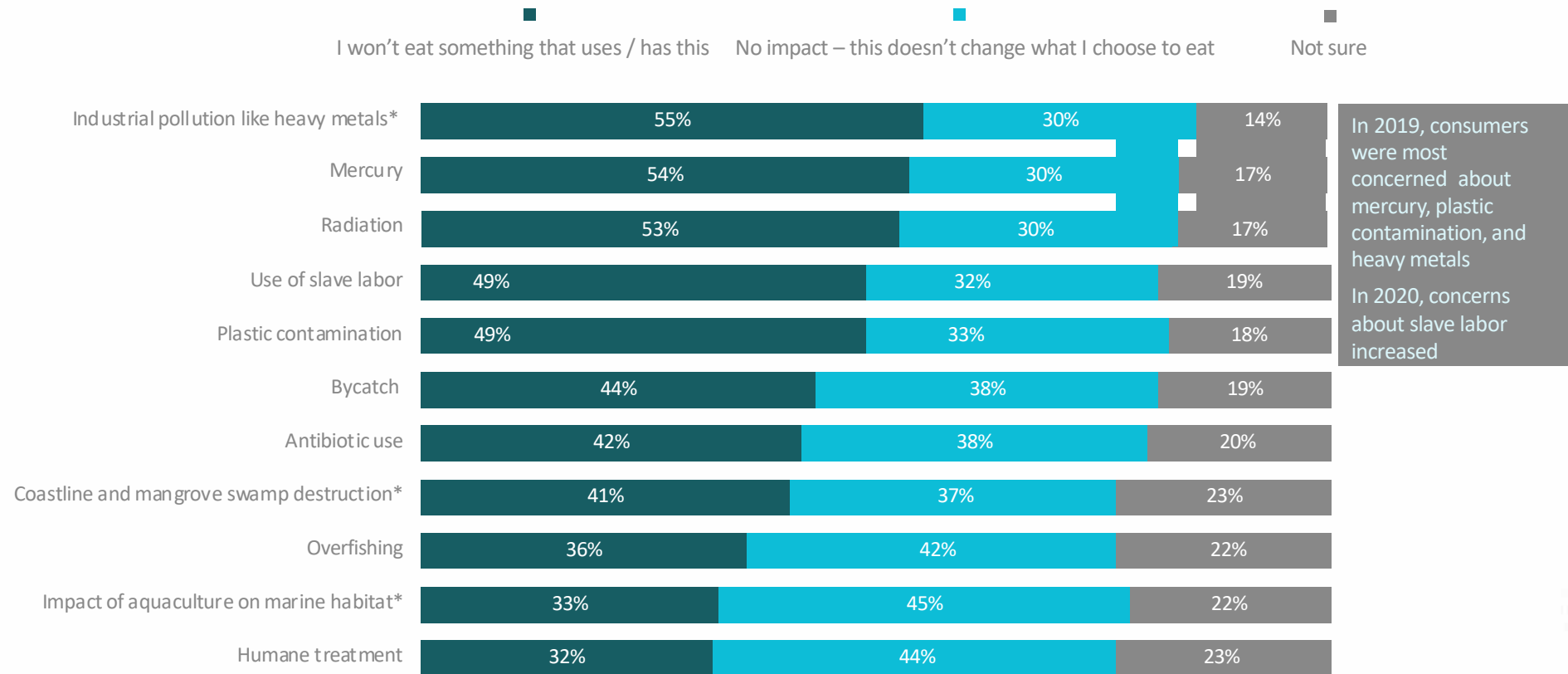


But it's not actually replacing beef



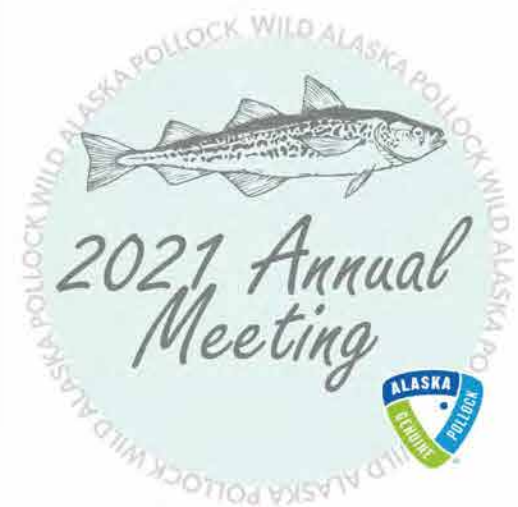
Concerns about ocean health stand in the way

IMPACT ON EATING DECISION*

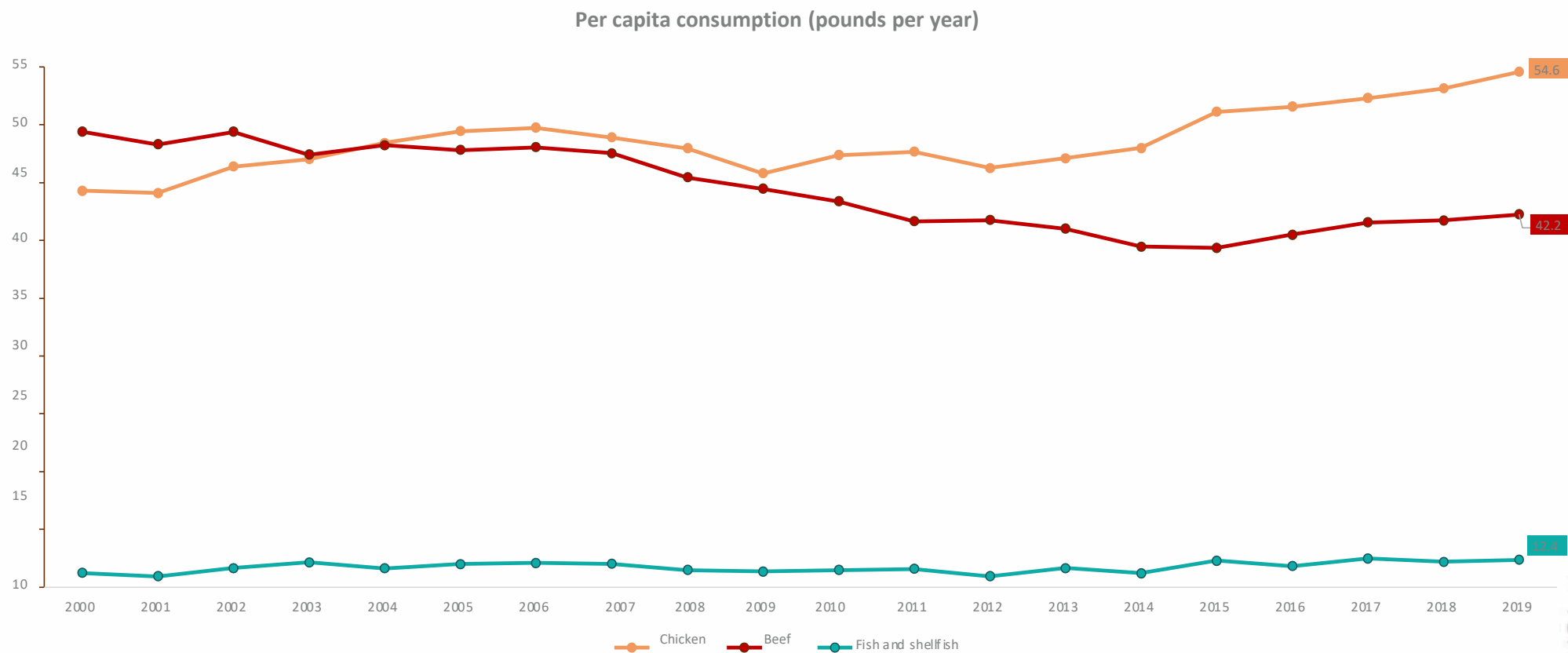




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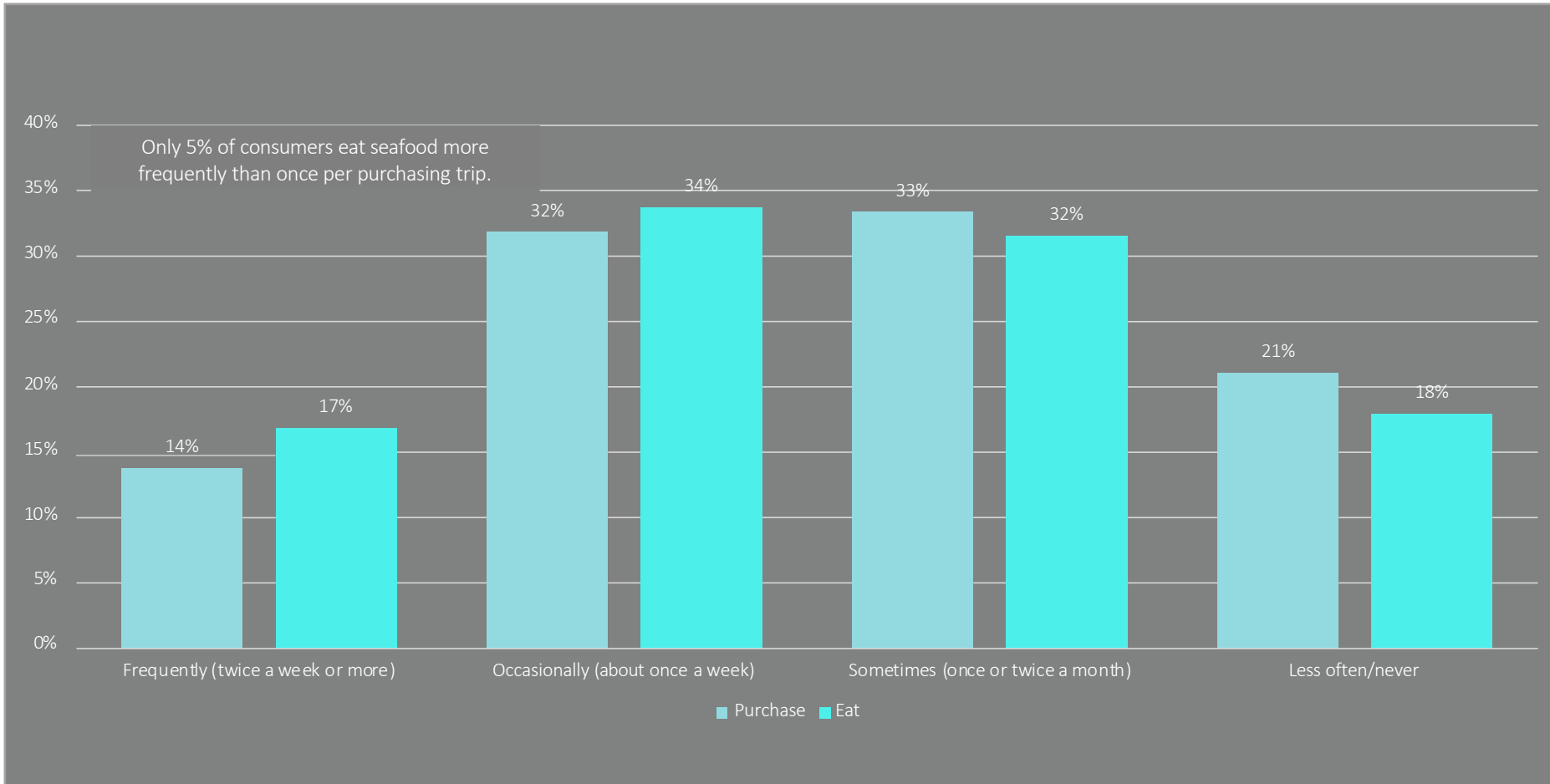
We're eating even more chicken instead

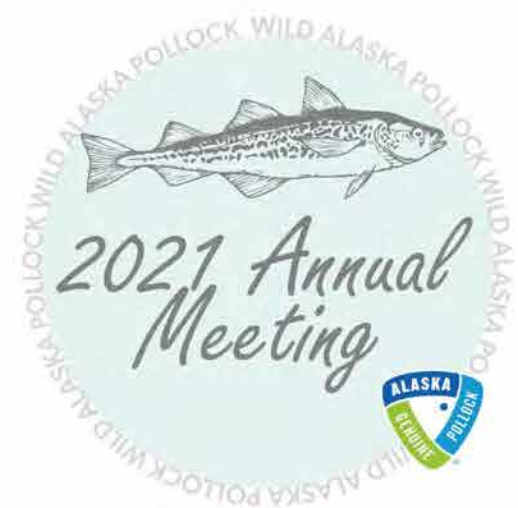






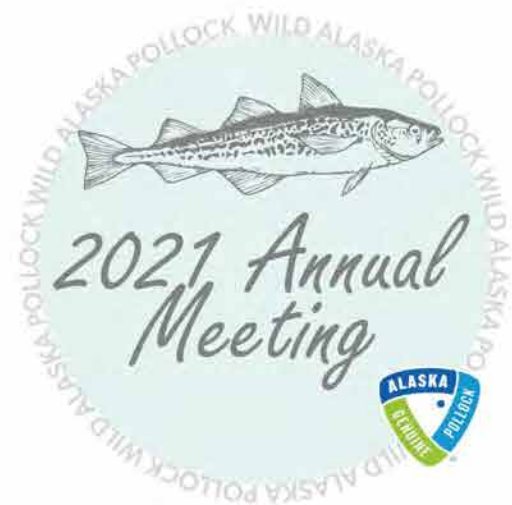
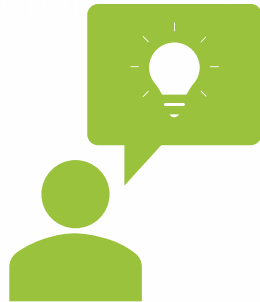
Our shopping-to-fish eating relationship remained the same during COVID





Our Message (to overcome hurdles)

- Sustainability messaging (pure Alaskan waters, industry reducing plastic pollution).
- Food integrity (no synthetics or unpronounceables).
- Ethical business and fair labor.
- Protein sells! (enough said)



For Buyers: Pollock is Fish (not fake shellfish)

- Real fish (that you can price like real fish).
- Sustainable, clean protein.
- Affordable and dependable supply from American waters.
- Flexible product that can be cooked and served many ways.
- Easy applications to get fish on the menu (or flying out of the store).





More Pollock More Often



Not just a fillet (nose to tail)



Ground Fish (not just Groundfish)



Simple Keto and Paleo Friendly Applications



Global Flavors on American menus

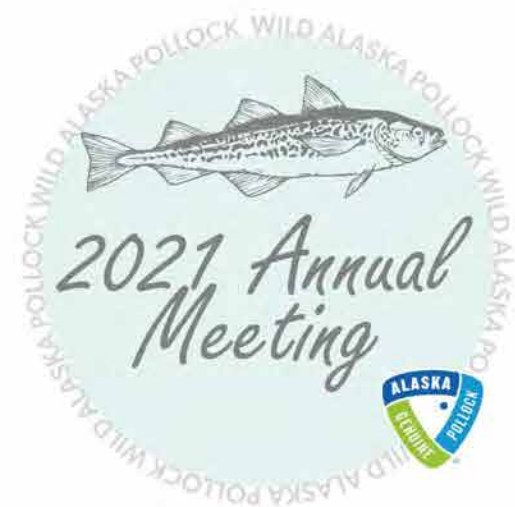


More Eating Occasions

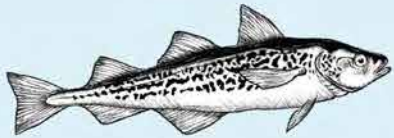
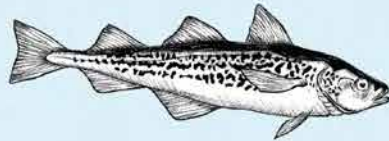




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QUESTIONS?



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Closing Remarks



Craig Morris
*CEO of Genuine Alaska Pollock Producers
(GAPP)*

