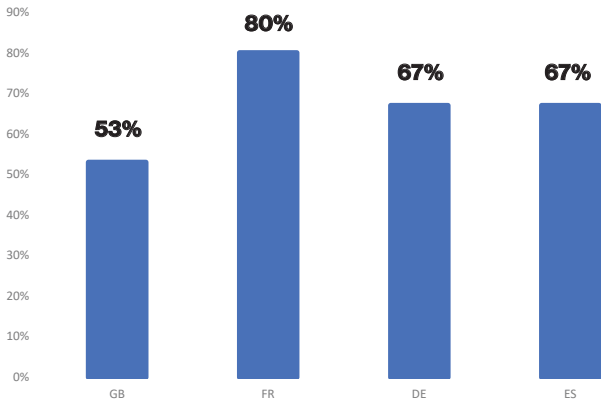


Role of Country of Origin in Consumers' Appetite for Alaska Pollock

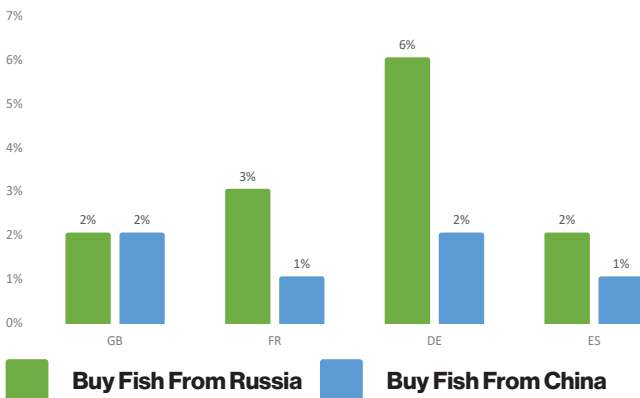
Importance of Knowing Country of Origin



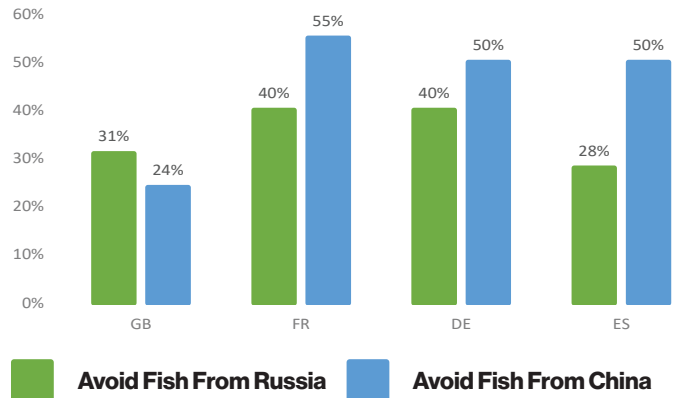
The Association of Genuine Alaska Pollock Producers commissioned a survey with Strat 7 incite to understand the role country of origin plays in consumer's fish purchase considerations. The study was conducted by 15-minute quantitative surveys with 400 interviews in each market: UK, France, Germany and Spain with consumers who have eaten fish in any format in the past 3 months using a representative sample of the general population, aged 18 - 70 years old.

Results found that the majority of consumers **CARE** about where the fish that they purchase for their family is sourced. Few consumers actively seek to buy fish from either Russia or China with many actively avoiding fish from these countries.

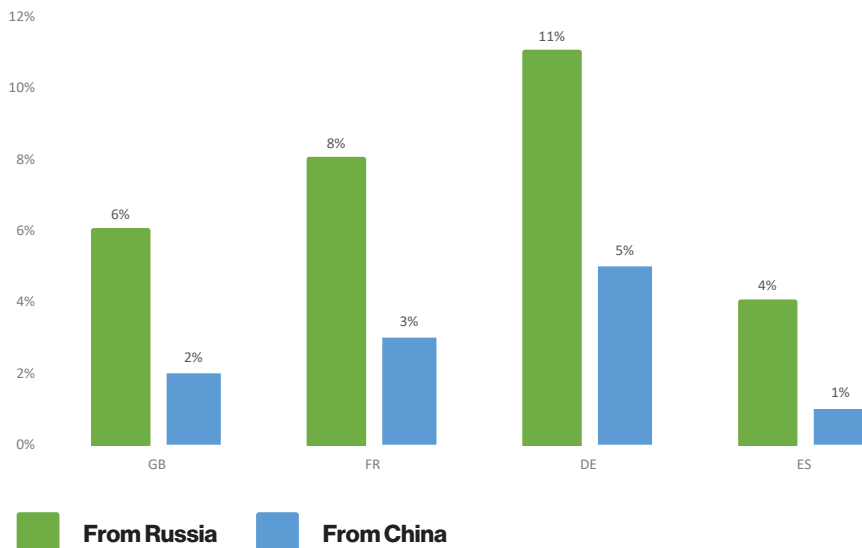
% That Would Buy Fish from Russia or China



% That Would Avoid Buying Fish from Russia or China



% Of Consumers Who Think Wild Alaska Pollock Comes from Russia or China

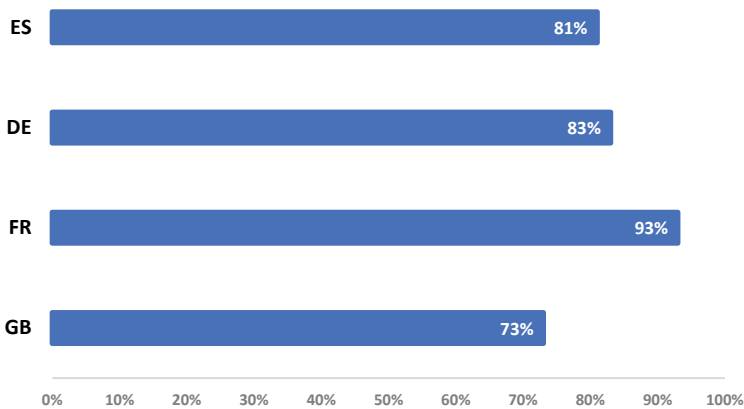


Russia and China are both rejected for food safety practices and suspect regulations while Russia is also avoided for their aggressive actions in the Ukraine.

Country of Origin is even more important for Alaska Pollock than fish overall. Consumers inherently associate Alaska Pollock with the United States, because of its name.

Few consumers believe Alaska Pollock is sourced from either Russia or China.

% of Consumers Who Believe Alaska Pollock Should Come from Alaska

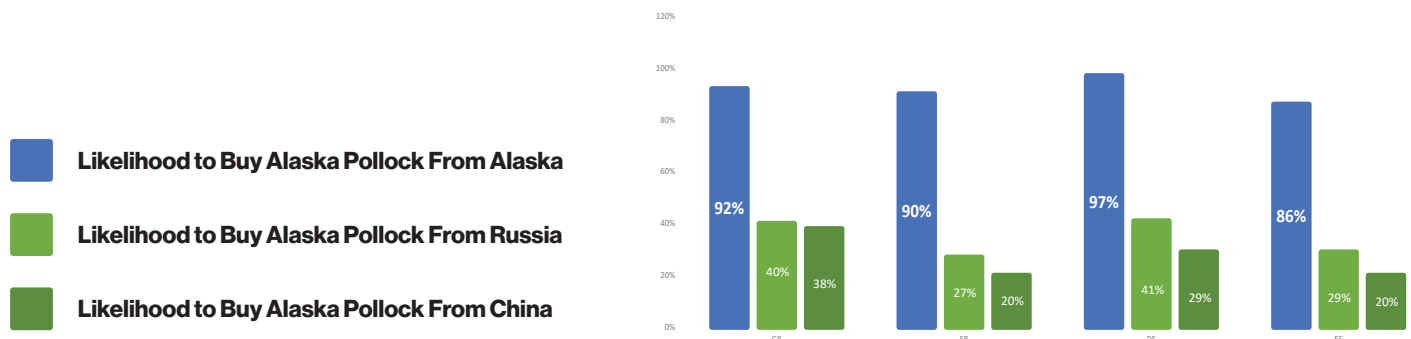


Consumers PREFER Alaska Pollock sourced from Alaska and NOT from Russia or China.

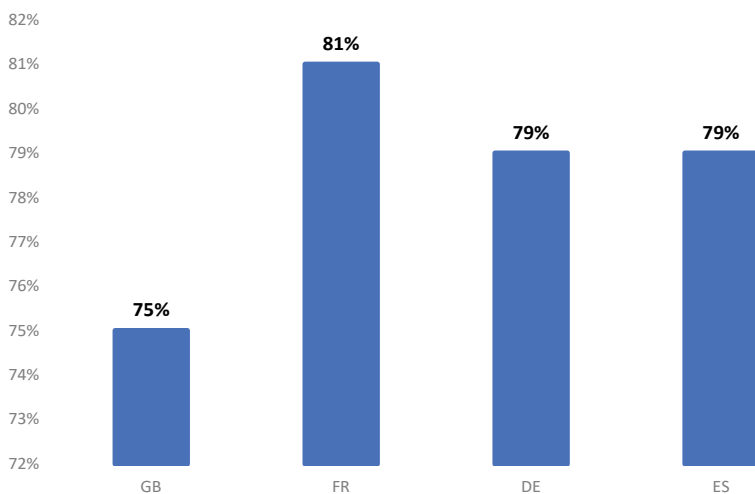
Consumers feel informed, interested and reassured when they learn the Alaska Pollock they purchase is from Alaska.

Consumers have high rejection levels of Alaska Pollock from Russia or China. They are likely to feel confused, worried and/or misled to learn that Alaska Pollock is sourced from either country.

Likelihood to Buy Alaska Pollock from...



% of Consumers Who Are Less Likely to Purchase When the Alaska Pollock is from Russia and Processed in China



When informed of the twice frozen processing of Alaska Pollock from Russia through China, consumer purchase interest is further suppressed.

Consumer preference is clear: when it comes to Alaska Pollock, they expect, prefer and wish to purchase Alaska Pollock from Alaska.