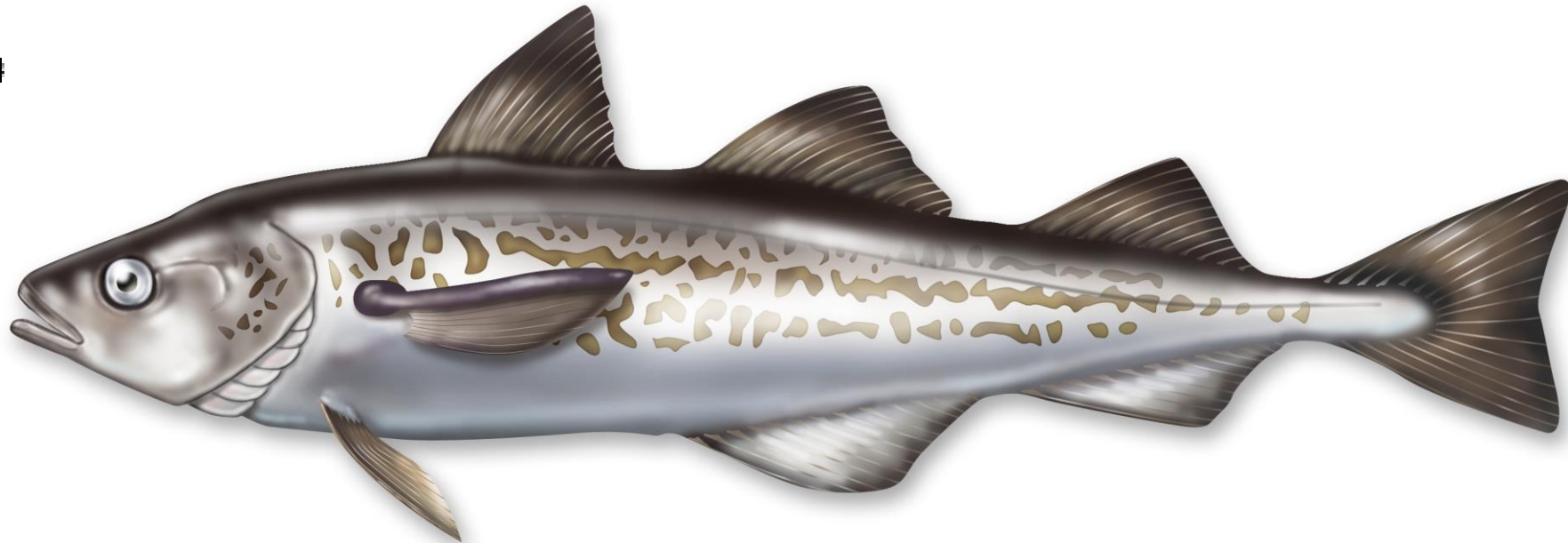




# Wild Alaska Pollock Industry Update

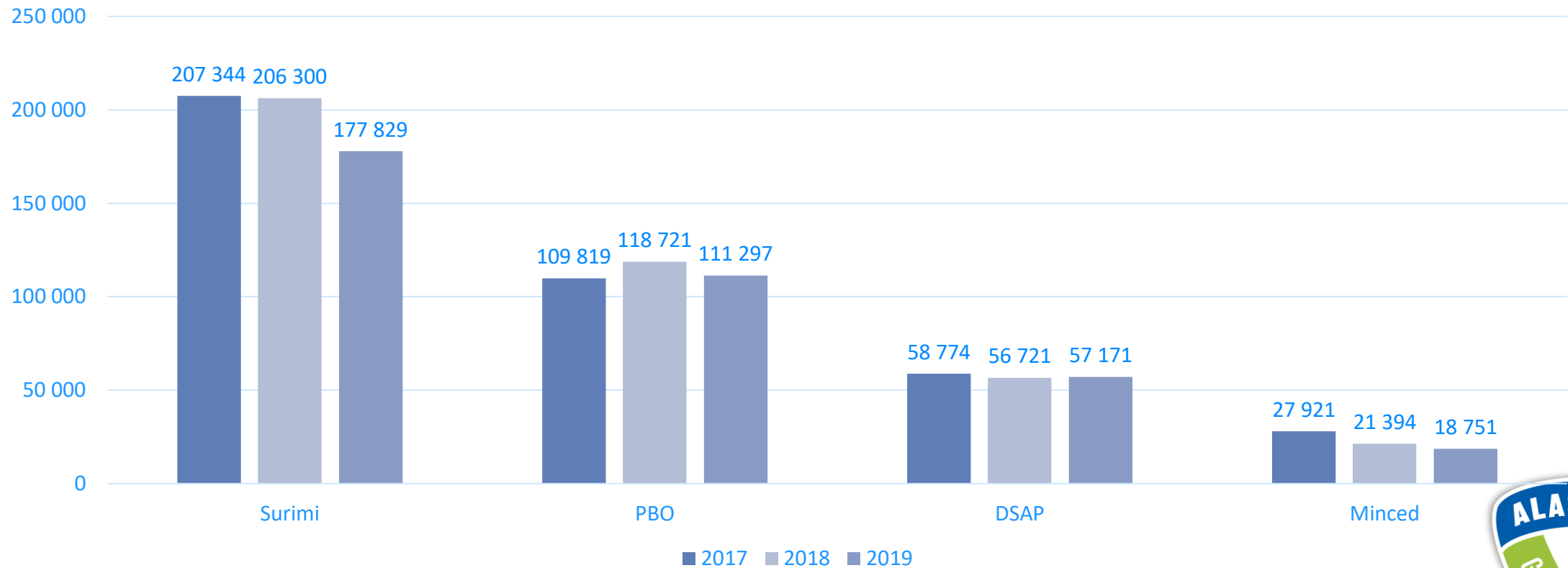
October 10, 2019

**There's never  
been a better  
time for Wild  
Alaska Pollock!**



# U.S. Wild Alaska Pollock Production through September 14

Chart Title





2018: Wild Alaska Pollock Industry leadership unites to redouble efforts and creates standalone GAPP.





# GAPP History Through the Years

- **Originally established:** 2003 to include membership from Wild Alaska Pollock processing industry.
- **Original mission:** serve as a tactical organization aimed at addressing near-term issues affecting the Wild Alaska Pollock industry.
- **Investment:** relatively low, ranging by year from \$200,000 to up to \$1,000,000 depending on issues to be addressed.
- **Purpose:** GAPP has the ability to partner with brands such as Gorton's and High Liner Foods to build demand for products containing Wild Alaska Pollock.
- **New and improved:** In 2018 industry leadership decided that GAPP should serve the entire Wild Alaska Pollock fishery's primary organization.
- **New Investment:** All members of the Wild Alaska Pollock fishery would participate on an equal basis corresponding to their share of catch; total investment of *\$10 million over three years.*
- **Executive Leadership:** As a part of GAPP's 2018 restructuring, the Board was reconstituted to represent each sector's share of the Wild Alaska Pollock fishery.



# GAPP Mission Defined in 2019 Strategic Plan

Build Awareness of WAP/Increase Demand for the Fish

Encourage new channels and value-added product innovations

Build inherent customer loyalty for WAP

Wild Alaska Pollock Brand, Presence & Recognition



# GAPP's 2019-20 Strategic Deliverables

Establish GAPP as a fully functional, stand-alone organization which is well-respected throughout the industry and as a national non-profit.

Establish a functional GAPP Committee structure that focuses on specific products as opposed to markets and relies on industry expertise to dictate individual campaigns and activities.

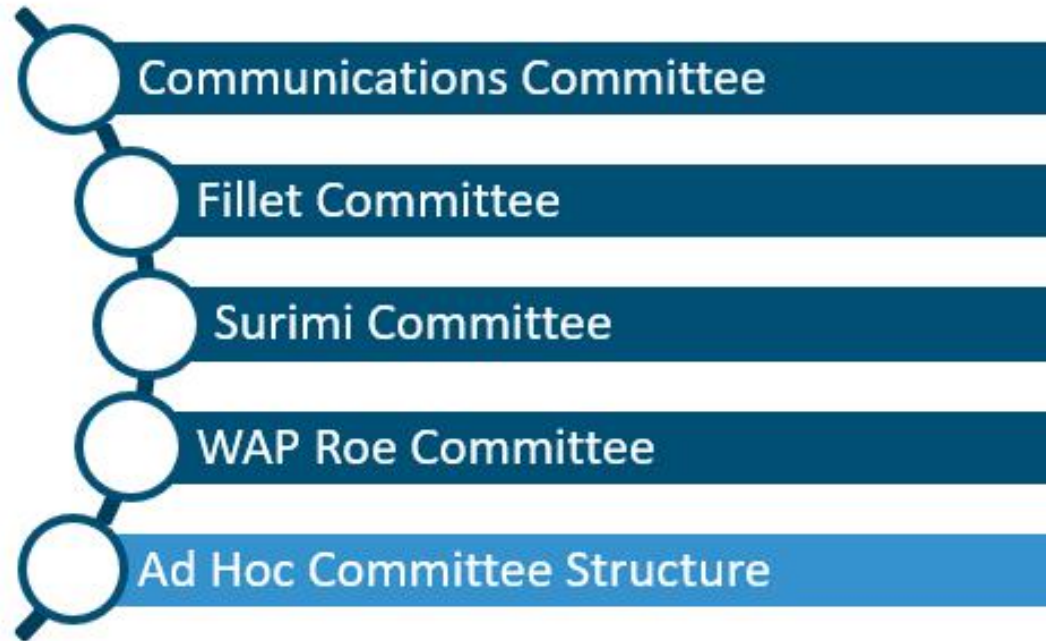
Build a core, foundational research base for WAP industry that identifies our current and potential customer, attitudes about the protein and key attributes that resonate with consumers.

Craft an exciting, dynamic and comprehensive global narrative for Wild Alaska Pollock and position GAPP as an authority and go-to resource for information about how best to market the fish.

Effectively communicate ROI to GAPP members; recruit new members to increase overall organizational budget.



# Member Driven, Member Led





# Current GAPP Priorities

- **Wild Alaska Pollock Narrative Development**
- **New GAPP Website**
- **GAPP Partnership Programs**
- **GAPP October 29 Annual Meeting**
- **Foreign Market Research & Strategy Development**
  - Japan Consumer Study
  - European Stakeholder Analysis
- **Member and Associate Member Engagement**



# GAPP: Providing Critical Industry Information




**GAPP**  
*Wild Alaska Pollock*  
Fishery Update

September 9, 2019

## 2019 Alaska Pollock Seasonal Quotas

Gulf of Alaska	Bering Sea
<ul style="list-style-type: none"> <li>A Season (1/20 – 3/10) 31,677 mt</li> <li>B Season (3/10 – 5/31) 31,677 mt</li> <li>C Season (8/25 – 10/1) 31,677 mt</li> <li>D Season (10/1 – 11/1) 31,677 mt</li> </ul>	<ul style="list-style-type: none"> <li>A Season (1/20 – 6/10)                             <ul style="list-style-type: none"> <li>Inshore 275,710 mt</li> <li>C/P 220,568 mt</li> <li>MS 55,142 mt</li> <li>CDQ 63,729 mt</li> </ul> </li> <li>B Season (6/10 – 11/1)                             <ul style="list-style-type: none"> <li>Inshore 336,979 mt</li> <li>C/P 269,584 mt</li> <li>MS 67,396 mt</li> <li>CDQ 77,871 mt</li> </ul> </li> </ul>

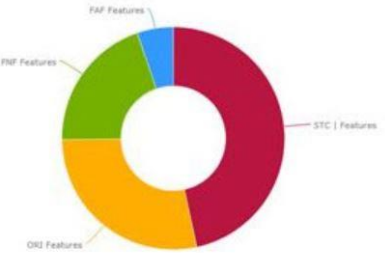

Source: NOAA Fisheries



**ALASKA GENUINE POLLOCK**  
*Genuine Alaska Pollock*

Genuine Alaska Pollock Producers  
info@alaskapollock.org

### Coverage at a Glance

**Wild Alaska Pollock Industry News**

**General Protein Awareness**

Good Morning!

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

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



# GAPP's New Website: Coming October 2019

Contact Us Member Portal Search English



GENUINE ALASKA  
POLLOCK PRODUCERS

ABOUT THE FISH

RECIPES

WHERE TO BUY

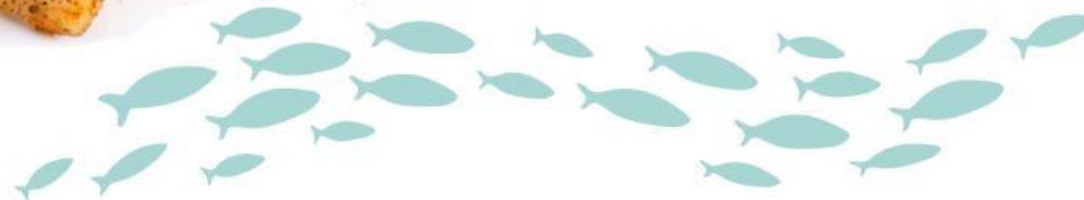
ABOUT GAPP



ALWAYS WILD, ALWAYS ALASKAN:

ENJOY THE  
WORLD'S BEST  
FISH

GET SCHOOLED →



# Successful North American Partnership: New Channels, New Consumers



Available at select  
Costco® locations





# Consumer Research: Finding our Fish Brand

- Stakeholder Interviews
- Online Consumer Surveys
- Consumer Focus Groups

IF YOU BUILD IT  
THEY WILL COME



# Stakeholder Interviews

CPG	Distributor	Industry	QSR	Retail	National Chain Restaurants	Fine Dining
		Captain Jack				
						
						
						



# Key questions this research sought to answer



**What are consumers' seafood behaviors & habits?**



**What do consumers think about Wild Alaska Pollock?**



**What will drive purchase of Wild Alaska Pollock?**



**What are the best ways to get Wild Alaska Pollock's story out?**



**Who are the best audiences to engage with to tell the Wild Alaska Pollock story?**



# What have we learned?

1

Wild Alaska Pollock is omnipresent fish that has awareness despite industry assumptions that it is unknown and hidden.

2

But times have changed and technology has improved, so more people have more access to frozen Wild Alaska Pollock in various formats.

3

At the same time, preparing fish is still scary for many – they don't want to ruin their investment due to poor preparation.



**Wild Alaska Pollock is a food solution that ticks all the boxes**

4

Consumer tastes are also evolving, and people want access to a protein that is versatile as an ingredient as well as format-wise.

5

They want fish that's affordable, easy and nutritious.

6

However, GAPP's target audience, Future Wild Alaska Pollock Advocates more so value sustainability and enjoyment – in addition to knowing its culturally used & unique.

7

Sustainability is part of Wild Alaska Pollock's diverse story, and it matters to consumers –especially Future Wild Alaska Pollock Advocates.



# There's an audience excited about Wild Alaska Pollock: Future Wild Alaska Pollock Advocates

*Future Wild Alaska Pollock Advocates are more likely than the general population to be...*



## **Millennial.**

36% of Future Wild Alaska Pollock Advocates are Millennials, compared to 25% of the general population.



## **Affluent.**

62% of Future Wild Alaska Pollock Advocates earn above \$50k in HHI, compared to 48% of the general population.



## **Educated.**

70% of Future Wild Alaska Pollock Advocates have at least some college education, compared to 59% of the general population.



## **Strong Purchase Power.**

72% are likely to buy Wild Alaska Pollock in fast food, 62% in sit down restaurants and 64% in grocery, which is significantly higher than the general population

*Nuances to consider for Future Wild Alaska Pollock Advocates*

## **Sustainability matters.**

More than any other group, this audience is highly impacted by sustainability messaging, particularly knowing it is “the most abundant certified-sustainable fish in the world,” “it is sustainably managed and harvested” and “has a lower carbon footprint.”

## **Quality over cost.**

This audience differs from the general population in that they value that their fish is “enjoyed by the whole family” and is made from “100% whole fillets.” Whereas, most people would put cost and easy preparation ahead of this.

## **Showcase the diversity.**

More than most people, this audience is heavily influenced to buy Wild Alaska Pollock if they know its in their “favorite ethnic and cultural dishes.”

## **Distinguish the difference.**

Future Wild Alaska Pollock Advocates indicate they'd buy more Wild Alaska Pollock if they knew it was different than “other variations of Pollock (e.g. Atlantic Pollock)”.



# So what?

## **Fish is confusing.**

A blend of fish unfamiliarity, high costs and a lack of comfort in cooking seafood fosters fish insecurity among consumers.

## **People know *of* Wild Alaska Pollock.**

Wild Alaska Pollock is an omnipresent fish that has awareness despite industry assumptions that it is unknown and hidden.

## **What's discreet is truly unique.**

The hidden story of Wild Alaska Pollock's sustainability and versatility of formats are not being told and are differentiators.

## **The freezer aisle is important...**

People aren't deterred by frozen fish, and in fact, see it as a solution to providing greater access to fresh, sustainable, healthy fish

1

## **Fuel confidence in fish.**

With no competitor fish being the clear leader in easy preparation, even small ways of building knowledge and confidence matter.

2

## **Now, tell people *about* Wild Alaska Pollock.**

Move beyond known attributes of provenance, taste and health and better communicate Wild Alaska Pollock's competitive cost and easy preparation.

3

## **Tell the untold stories.**

Convey a clearer depiction of its sustainable abundance and versatile formats. This is especially key to attract and obtain the dollars of the fish's future advocates.

4

## **...but not the only place you need to be.**

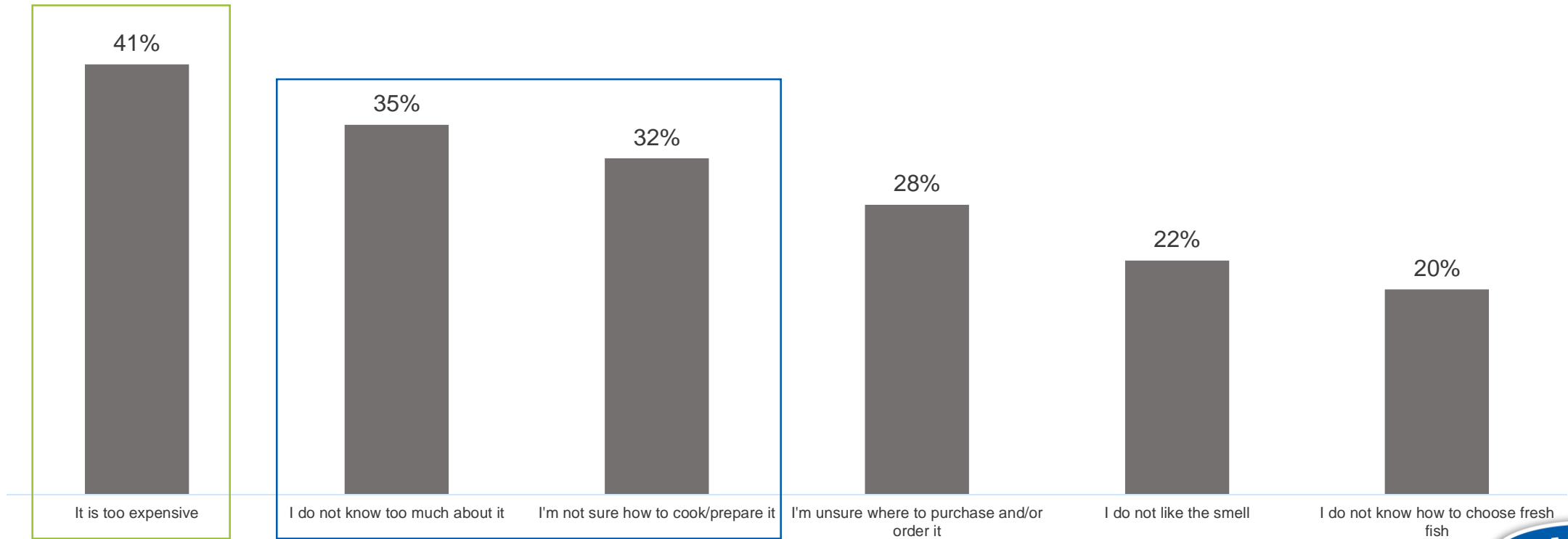
But to really get the message out there, you need to showcase the versatility and ease in social media, through shareable recipes, with greater visibility in QSR, as these touchpoints are all critical in connecting with the Wild Alaska Pollock advocate.





# Lack of familiarity is the #2 deterrent to people buying seafood, just behind cost.

What prevents you from purchasing and/or ordering fish?



Q25. What prevents you from purchasing and/or ordering fish? Base: aware of fish: 902

# People want tasty, healthy, affordable seafood without sacrificing easy preparation.

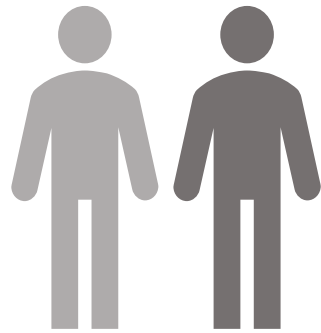
## Importance of Seafood Attributes

General Population	Attributes
68%	Great tasting
64%	Fresh tasting
54%	Heart healthy
54%	Affordable
50%	Easy to prepare
49%	Whole family will enjoy
49%	High in protein
48%	Made from 100% whole fillets
42%	Good as center of the plate
42%	Sustainable
41%	Versatile
41%	Product of the U.S.
40%	Quick to cook
37%	Good as an ingredient



Q8. Below is a list of attributes that people may use to describe seafood. For each, please rate how important that attribute is to you when purchasing and/or ordering seafood. Base: 1,026

# Although they are eating fish, they aren't comfortable cooking it on their own.



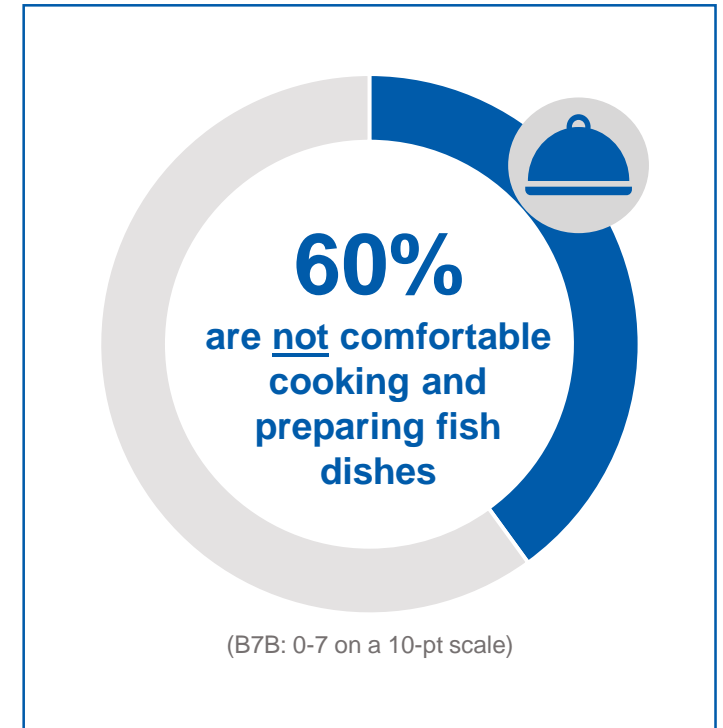
**Nearly half  
of consumers (49%)  
eat fish often\***

(vs 23% sometimes\* and 28% not often\*)



**2 in 3  
consumers (65%)  
typically prepare and eat  
fish at home**

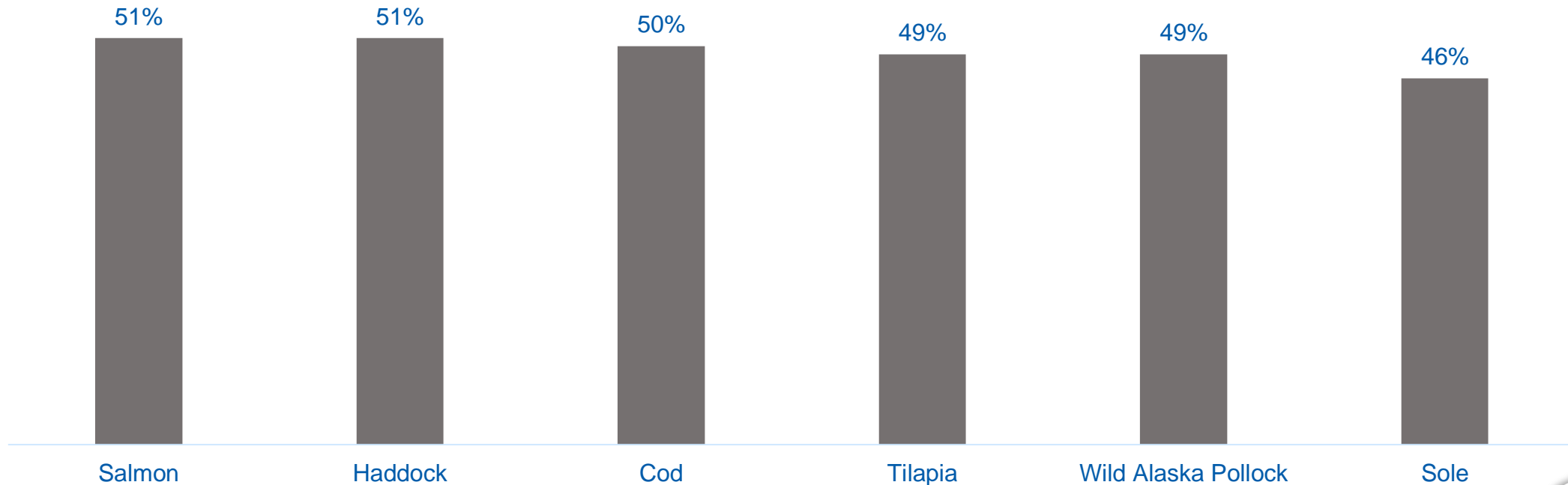
**48% do this once every two weeks or  
more**



S6. How often do you eat seafood? \*Often= once a week, once every two weeks; \*Sometimes= once a month; \*Not Often= once every few month, once every six months Base: 1,026  
S8. In what setting do you typically eat seafood? Please select all that apply. Base: 1,026  
S9. How often do you eat and/or purchase seafood within the following settings? Please select all that apply. Base: 1,026  
Q10. I am comfortable cooking and preparing fish dishes - How much do you agree with each statement? Base: 1,026

# And no fish is *clearly* leading the way in being simple and easy to cook.

**Ease of Preparing Fish**  
(Total respondents; T3B: 8-10 on a 10-pt scale)



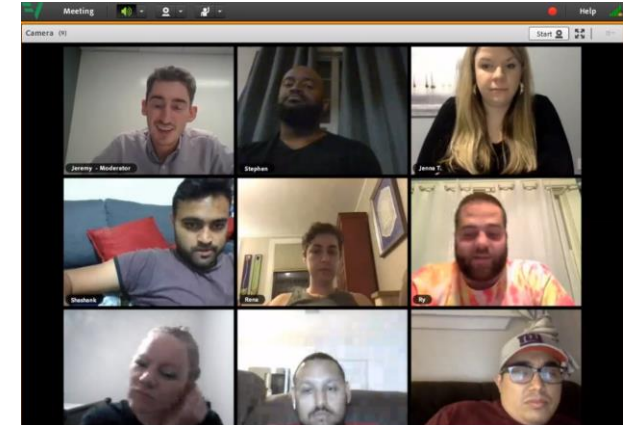
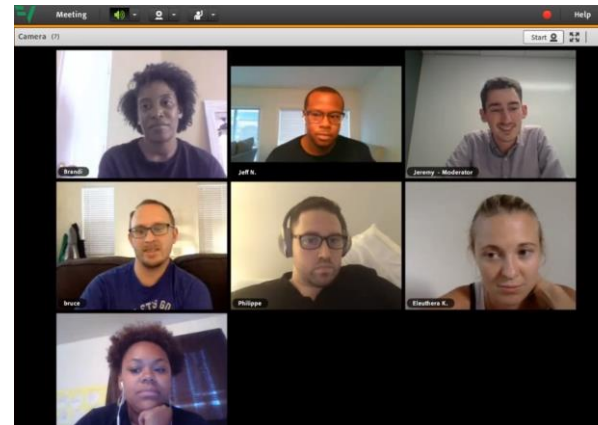
Q9. Now, thinking about the attributes associated with seafood, please tell us how well you feel each one describes [FISH] using a 0 to 10 scale. Base: Salmon: 406 Cod: 380 Tilapia: 380 Haddock: 379 Wild Alaska Pollock: 491 Sole: 376

# Recently, GAPP conducted research to understand what matters to priority audiences when buying seafood

GAPP recognizes our priority audiences as 'Future Wild Alaska Pollock Advocates'.

They are:

- Millennial
- Seafood Consumers
- Educated
- Moderately affluent
- Parents and non-parents
- Motivated to buy Wild Alaska Pollock once they learn more about it



Actual 'Future Wild Alaska Pollock Advocates' we spoke to via online focus groups







Images for Guide.pptx

Made from 100% whole fillets    Lean protein    Whole family will enjoy    Product of Alaska

Once-frozen    Flaky    Mild    Individually-Quick Frozen

Wild-caught    Twice-frozen    Firm    Imported    Good as an ingredient

Product of U.S.    From the Bering Sea    Frozen at sea    Locally sourced

Heart healthy    Low-fat    Great tasting    Traceable

High in protein    Versatile    Sustainable    Affordable    Good as center of plate

Expensive    Fresh tasting    Easy to prepare    Quick to cook

**Consumer Focus Groups**

- Jeremy Guterl - Moderator
- Mike Cusack - O
- Stacey Jaffe - O
- Participants (14)
  - FV TECH
  - Carla W.

Client Chat (Everyone)

frozen?  
 ----- (10/02/2019 17:37) -----  
 Kristina Amaral - O: yes & thanks Margery! It looks like they are :)

Input field for chat

Everyone

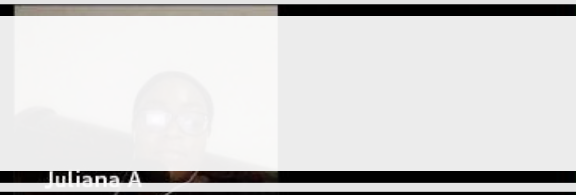
InterVu Live Marking Pod

Don't close your InterVu meeting window unless this indicator light is green.

Filter marks

Input field for marking

CREATE A MARK



# Through this research, we learned that there's massive potential for Wild Alaska Pollock - there's strong name recognition & people get excited to buy once they've learned more about its possibilities

People *know of* Wild Alaska Pollock's name, but don't know about all its applications.

"I think I've had it in fish and chips"

"They make great fish sticks!"

"I think it's a whitefish blend, similar to cod or tilapia. I think I've had this fish in a fish & chips dish at a bar"

"I feel like it has mutual flavors to cod and tilapia, but I can't really distinguish it"

Versatility, as an ingredient and in preparation, matters to this audience.

"Wild Alaska Pollock is one of the fish I always grab. It is so versatile that I prefer it over the other fish options."

"It's so versatile [Wild Alaska Pollock] that you could use it all dishes."

"When I heard that Wild Alaska Pollock is versatile – that caught my eye. The first thing I thought of was fish tacos!"

To further motivate them, the sustainability and traceability of Wild Alaska Pollock can't be overlooked.

"The fact that [Wild Alaska Pollock] is not grown in a fishery in conjunction with being sustainable is really important to me. To be sustainably sourced and wild-caught is pretty cool."

"Sustainable stuck out to me because I know commercial fishing in some places have significant issues with the environment. So that is good that this is from US waters, especially off of Alaska."

"Traceability is important because you need to know where your food comes from. Like with romaine and the recent recall, they were having a hard time tracing where it came from. I like that [Wild Alaska Pollock] would be traceable."



# What do we do with this?

- **Build messaging for marketing WAP in various settings:**
  - Retail
  - Restaurant (QSR & WTC)
  - Food Service
- **Train industry on how to use messaging**
- **Build consistent branding in U.S. market & then start to build global brand**
- **Empower our partners to use messaging to market our fish**

CONSISTENCY

Is

KEY

# First Ever: Wild Alaska Pollock Annual Meeting!



CLOTHING #1





**October 12, 2020**

*Wild Alaska Pollock Annual Meeting*

**Seattle, WA**

**Save the  
Date!**

