



FY2017

ALASKA SEAFOOD
MARKETING INSTITUTE

ANNUAL REPORT



Alaska Seafood Marketing Institute

BOARD OF DIRECTORS

The governor-appointed, seven-member Alaska Seafood Marketing Institute (ASMI) Board of Directors is allocated to five processors (four large processors, one small processor) and two commercial harvesters. Through ASMI's system of operational and species committees, the board and staff receive input primarily from industry experts in the harvesting and processing sectors.

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COMMUNITY AND ECONOMIC DEVELOPMENT

MESSAGE FROM THE EXECUTIVE DIRECTOR

Having been born and raised in Alaska, I'm incredibly humbled when I think about the essential role commercially caught seafood has played in Alaska's past and present. This report provides a great opportunity to reflect upon the Alaska Seafood Marketing Institute's considerable accomplishments over this past year toward our mission of increasing the value of Alaska's wild and sustainable seafood harvests.

Alaska's robust and diverse seafood industry should be a point of pride that we all share. Even during the current recession, Alaska's seafood industry continues to play a critical role in the state's economy. The seafood industry directly employs more individuals than any other private sector trade and contributed over \$5.0 billion in economic output across Alaska in 2016.

Despite uncertainty at both the state and federal level for valuable marketing funds, ASMI continues to evolve to meet countless market challenges head-on. Through smart promotion and strategic market development, sockeye markets have stabilized. Alaska pollock markets continue to show promise thanks to product development and focused promotional efforts. New markets are opening across the world as ASMI continues to introduce Alaska seafood to today's global citizens.

ASMI is also shining a searchlight inward as we look for ways to maximize value of Alaska's seafood. A new ASMI report explores the immense potential to significantly increase the value of Alaska's seafood resource through research & development, market development or expansion for low-value species, full utilization of current waste streams, maximized directed harvests, and new technologies. It is promising to see that within such a valuable industry Alaska seafood still has room to grow while still maintaining its founding principle of sustained yield management.

And so, too, ASMI evolves as new staff and committee members bring fresh ideas and new perspectives to ASMI's work. We're honored to be the stewards of Alaska's incredibly story, and look forward to another year of innovation, growth and success.



Alexa Tonkovich
EXECUTIVE DIRECTOR





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HOW ASMI WORKS

MISSION STATEMENT

The Alaska Seafood Marketing Institute is a marketing organization with the mission to increase the economic value of the Alaska seafood resource through:

1. Increasing positive awareness of the Alaska Seafood brand.
2. Collaborative marketing programs that align ASMI and industry marketing efforts for maximum impact within the food industry.
3. Championing the sustainability of Alaska seafood harvests resulting from existing Alaska fisheries management imperatives (State of Alaska Constitution, Magnuson-Stevens Fishery Management and Conservation Act and The Halibut Act).
4. Proactive marketing planning to address short and long-term goals while remaining flexible and responsive to a changing environment and economy.
5. Quality assurance, technical industry analysis, education, advocacy and research.
6. Prudent, efficient fiscal management.

CORE PRINCIPLES

ASMI exists to serve the entire Alaska seafood industry, harvester and processor alike. It is supported by industry self-assessments and uses available public funds to achieve marketing successes for the common good. ASMI adheres to the following Core Principles:

1. ASMI follows the highest ethical standards in its day-to-day operations and in its business relationships.
2. ASMI values its employees and members and insists that all be treated with dignity and respect.
3. ASMI conducts business in the open so its actions and decisions are visible.
4. ASMI tells the truth when it conducts promotions or makes claims in the marketplace.
5. ASMI conducts marketing activities that provide the largest economic benefit for its industry members.



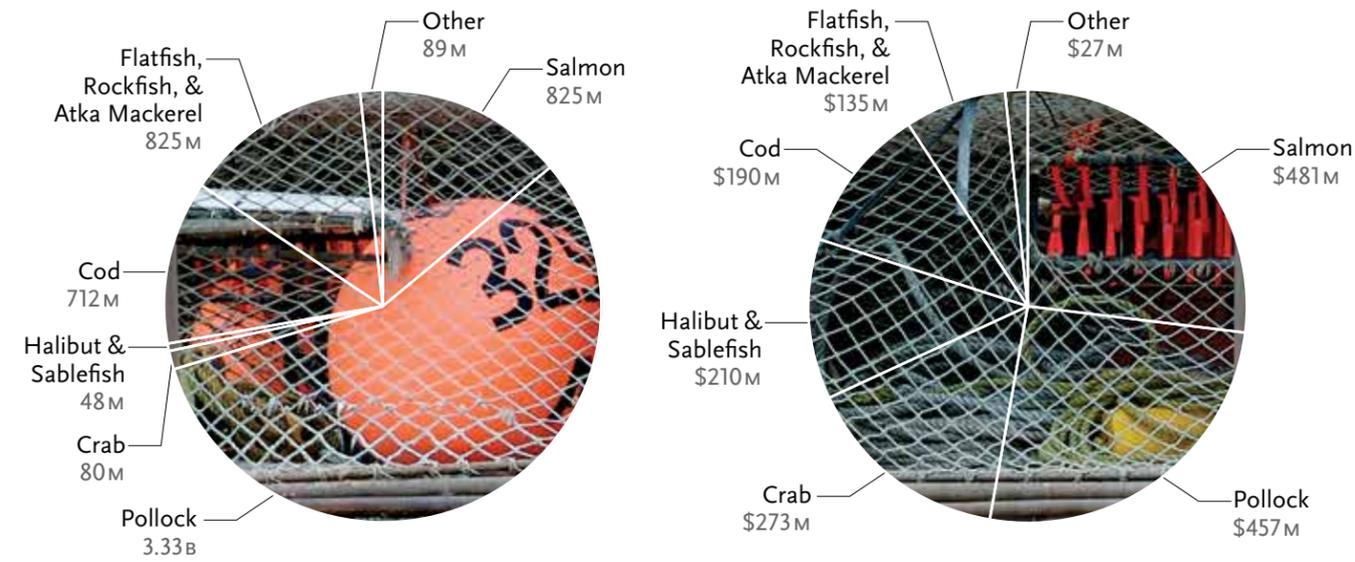
ASMI'S ROLE

ASMI is a public-private partnership between the State of Alaska and the Alaska seafood industry established to foster economic development of a renewable natural resource. ASMI plays a key role in the positioning of Alaska's seafood industry as a competitive, market-driven, food production industry.

ASMI increases the value of Alaska's seafood resource by building equity for the Alaska Seafood brand in both U.S. and international markets through:

- consumer campaigns to strengthen demand for wild and natural Alaska seafood, stimulate sales and increase economic value of Alaska seafood;
- advertising and public relations campaigns to boost usage of all commercial species of Alaska seafood;
- outreach at expositions and trade shows;
- engaging broadline foodservice distributors to maximize Alaska Seafood brand penetration on menus domestically and abroad;
- promotions with retailers and foodservice operators to build on strong brand equity to differentiate Alaska seafood from the competition;
- partnering with restaurant chains to increase the number of restaurants that feature Alaska seafood as a branded menu item;
- media tours and media outreach to secure positive publicity for Alaska seafood products and the Alaska seafood industry; and
- managing the Alaska Seafood brand.

ALASKA SEAFOOD INDUSTRY SNAPSHOT



2015/16 Average Harvest Volume 2015/16 Average Ex-Vessel Value

Annual Average Total Volume: 5.91 billion pounds

Annual Average Total Ex-Vessel Value: \$1.77 billion

Source: National Marine Fisheries Service and Alaska Department of Fish and Game, compiled by McDowell Group.

EMPLOYMENT BY THE NUMBERS

Fishing & Related Vessels 9,423

Fishermen Jobs 29,200

Processor Jobs 24,500

Management/Other Jobs 3,200

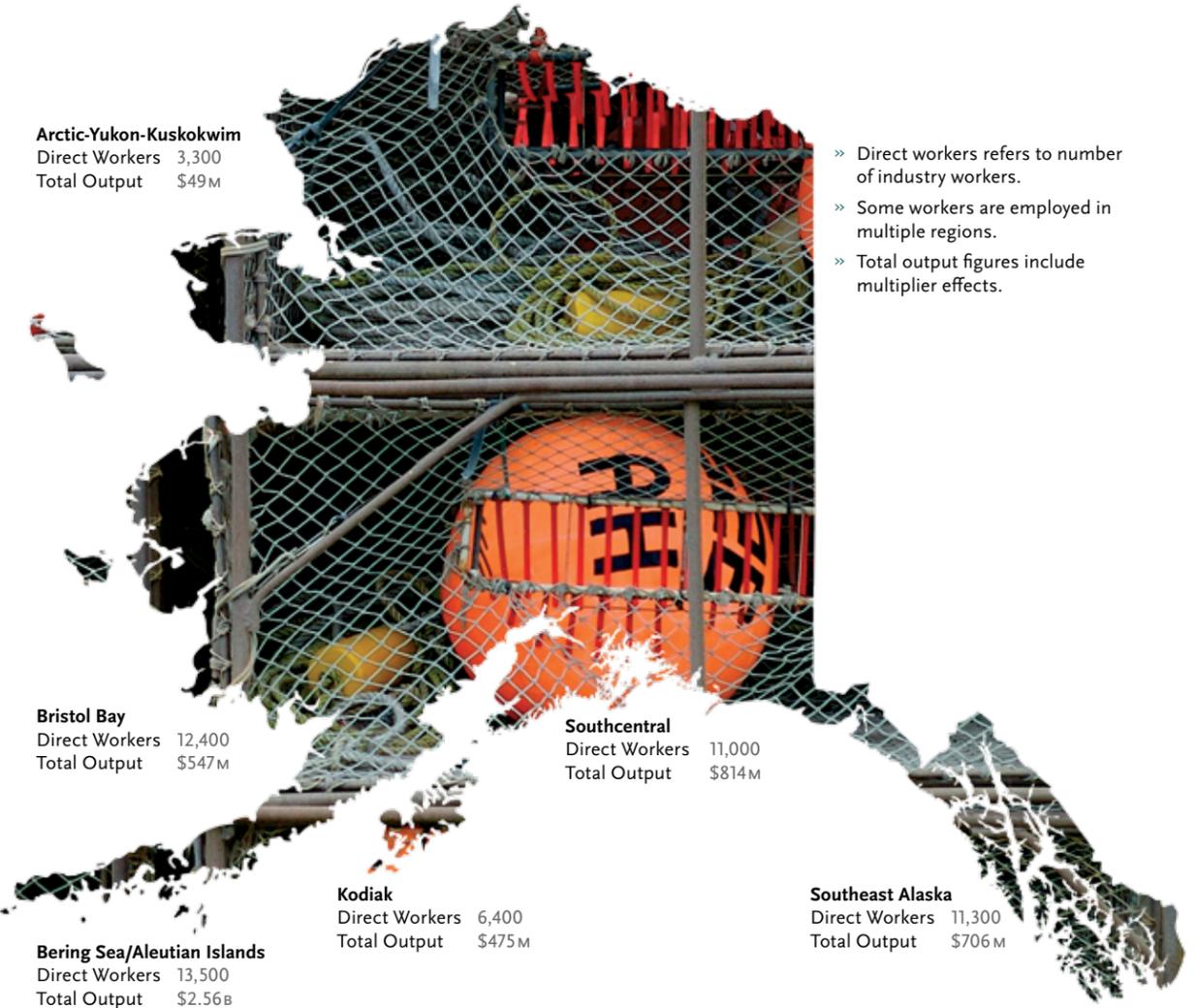
Alaska's seafood industry creates \$5.2 billion in economic value for Alaska and generates an additional \$7.6 billion in value as industry income circulates throughout the U.S. economy.

Seafood is the economic foundation of many rural communities. Over 21,200 rural Alaska residents were directly employed by the industry in 2015, accounting for 15 percent of all rural working age adults.

Over \$146 million in commercial fishing taxes, fees and self-assessments were collected in 2016, paying more than \$58 million to state government, \$46 million to local governments, \$30 million to salmon hatcheries and \$13 million to the federal government.

REGIONAL ECONOMIC IMPACTS OF ALASKA SEAFOOD

2015/2016 Avg.



- » Direct workers refers to number of industry workers.
- » Some workers are employed in multiple regions.
- » Total output figures include multiplier effects.

ALASKA SEAFOOD IN THE GLOBAL MARKETPLACE

- » The ex-vessel value of Alaska seafood declined from 2011 to 2016 as increasing competition, lower harvests of key species and currency fluctuations negatively impacted value. However, based on preliminary valuation data, it is very likely that ex-vessel value for all species increased significantly in 2017, due primarily to an outstanding salmon season.
- » After several years of lower salmon prices and ex-vessel values, Alaska salmon prices and total resource value increased significantly in 2017. The ex-vessel value of Alaska salmon increased 67 percent in 2017 compared to 2016, and was 64 percent higher than 2015 (based on preliminary data). Demand for Alaska salmon and roe products is currently very strong.
- » Harvests of groundfish species such as Alaska pollock, cod, sole, rockfish and Atka mackerel were steady in 2017, at approximately 2 million metric tons. After several years of declining prices, wholesale pricing of Alaska pollock fillets, frozen cod and several other groundfish products improved during the latter half of 2017.
- » Performance for Alaska's high-value species (crab, halibut and sablefish) was mixed in 2017. Halibut and sablefish likely gained in value, while the value of crab likely fell sharply due to lower harvests. Prices for all three species are at or very near record-high levels.
- » While Alaska's overall harvest volume is strong, several species are facing lower abundance. Poor biomass survey results will translate to sharp reductions in harvests of cod and halibut in 2018, and the 2017 king salmon harvest was the lowest on record.
- » With 2018 bringing sluggish growth in farmed salmon production, significant reductions in global cod supply, a weaker dollar after years of strengthening, and a healthy global economy, the relative demand for many Alaska seafood species is expected to be very strong in 2018.
- » Alaska seafood exports rebounded sharply in 2017, based on preliminary data. The total value of exports increased 13.4 percent to \$3.45 billion, the highest total on record (in nominal terms back to 2005). Exports to countries with ASMI marketing programs increased 19.3 percent to \$2.48 billion.





ALASKA SEAFOOD CHALLENGES & SUCCESSES

CHALLENGE:

The strong U.S. dollar continued to make Alaska seafood products expensive relative to foreign competitors in 2017. Despite lower ex-vessel values resulting from the strong dollar and other factors, the 2016 ex-vessel value was still 27 percent higher than 2001 (after adjusting for inflation using the U.S. Consumer Price Index).

→ Success:

The 2017 Seafood Expo Global in Brussels, Belgium saw on-site and projected sales rebound to over \$50 million and \$640 million, respectively. Sales in 2016 were down dramatically due to the Brussels terrorist attack.

CHALLENGE:

Due to the ongoing Russian embargo, farmed Norwegian salmon continues to be redirected to the U.S. and European markets where it competes with Alaska salmon.

→ Success:

ASMI is constantly looking to expand its promotional channels for wild Alaska seafood. In 2017, healthcare promotional partner, Morrison Healthcare (representing over 500 U.S. hospitals) began offering Alaska salmon on a year-round rotation on patient menus and in guest cafés.

CHALLENGE:

Alaska salmon harvests have been increasingly dynamic in recent years, putting more pressure on ASMI and the industry to expand sales of species with larger harvests and retain value for species with lower harvests.

→ Success:

The value of Alaska sockeye improved despite declining farmed salmon prices in 2017 and another large Bristol Bay harvest. Demand for Alaska sockeye is particularly strong in the U.S. market, largely due to market development work coordinated by ASMI and the Bristol Bay Regional Development Association.

CHALLENGE:

Alaska pollock products have struggled to retain value in recent years due to competition from Russian pollock. The weak Russian currency puts Russian producers at a significant advantage versus U.S. Alaska pollock producers.

→ Success:

Alaska's first shopping app coupon on Ibotta generated nearly 22.5 million impressions, 119,000 engagements and 38,000 redemptions on sold packages of frozen Alaska pollock products.

CHALLENGE:

Per capita seafood consumption has generally trended down in major markets like Europe and Japan over the past decade. Competing protein prices in the U.S. for beef, pork and chicken are generally trending lower. Consumers are increasingly turning to plant-based sources for protein.

→ Success:

ASMI has kept up the promotional pace in all major markets while expanding consumer promotions in China. ASMI contributed \$61,250 to four e-commerce promotions that resulted in \$3,830,350 of sales of Alaska seafood.

CHALLENGE:

Despite the great strides made by the Global Sustainable Seafood Initiative benchmark in leveling the 'pay-to-play' eco-label playing field, it remains a challenge to entice all steps of the supply chain to register for and use the Alaska Responsible Fisheries Management certification.

→ Success:

Sponsoring and presenting at the SeaWeb Global Sustainability Summit in June 2017 ensured high visibility of Alaska Seafood among global seafood industry leaders from the conservation community, academia, government and the media.

CHALLENGE:

ASMI receives approximately \$4.2 million in federal Market Access Program funds each year for international marketing efforts. However, these funds must be matched and ASMI is facing budget cuts to all programs, including the international program, due to the loss of state general funds.

→ **Success:**

With funding from the Global Based Initiative grant from the USDA Foreign Agricultural Service, ASMI participated in a trade mission to Singapore and Thailand in September 2017, allowing ASMI to develop this region of growing interest without depleting funds from other programs.

CHALLENGE:

High-priced species, such as halibut and crab, are at or near record-low harvests and prices are accordingly very high. With price fatigue and buyers looking for lower-priced substitutes, it is very difficult to make up for lower harvest volumes with continually higher prices.

→ **Success:**

ASMI continues to support all species with domestic consumer public relations support, which earned over 2 billion impressions for Alaska seafood through 1,009 media placements.

CHALLENGE:

Export markets are critical to Alaska's salmon industry, accounting for approximately two-thirds to three-quarters of Alaska's salmon products by volume. The currencies of key salmon export markets, such as Japan, Europe, Canada and the Ukraine, have weakened considerably versus the dollar since 2013, causing downward pressure on prices for Alaska producers.

→ **Success:**

ASMI continues to pursue opportunities in these markets. In October of 2017 ASMI conducted an in-store Alaska seafood promotion at 380 Aeon outlets in Japan, supporting Alaska cod and sockeye salmon roe (sujiko). During the six-day promotion, \$67,692,779 of sujiko and \$155,495,810 in cod was sold.



CHALLENGE:

The value of sac roe herring products are very low and other herring products, such as fillets, are still niche products.

→ **Success:**

ASMI is expanding demand for herring roe through promotions in Asia and growing demand for herring fillets with its involvement in the increasingly popular Alaska Herring Week in Seattle. Participation in Alaska Herring Week increased for the third year in a row in 2017, where 70 different Alaska herring dishes were created in a myriad of ethnic flavor profiles.

CHALLENGE:

Adding value to the Alaska pollock resource remains both a challenge and opportunity. Despite increased demand for Alaska pollock fillet and surimi products due to market development by industry and ASMI, competing with low-cost Russian producers, who are also investing in modernized processing, presents challenges.

→ **Success:**

Together with University of Alaska Fairbanks and Oregon State University, ASMI received grant funding for the development of value-added market opportunities for Alaska pollock and yellowfin sole co-products.

→ **Success:**

As a result of the ASMI efforts, the national School Lunch Program, for the first time, now includes two Alaska pollock products in their catalog of products available to purchase.

CHALLENGE:

The closure of the Seattle-based marketing office and transition of six staff positions to Alaska in FY2018 will lead to the loss of institutional knowledge in the domestic marketing program as positions relocate or are filled by new staff.

→ **Success:**

ASMI has hired skilled marketing staff and has partnered with industry to help train these staff in pertinent industry issues. In addition, in partnership with Alaska Sea Grant and local seafood industry members, two graduate-level interns at the Kodiak Fisheries Industrial Technology Center worked on messaging support and conducted research on parasite control measures for Alaska seafood.

GOALS AND MEASUREMENT

Alaska Seafood Marketing Institute is tasked with increasing the ex-vessel value of Alaska's fisheries by promoting the Alaska Seafood brand all over the world. ASMI measures success by the following standards:

Goal 1: Food Brand Ranking

Maintain second place ranking of Alaska Seafood among the most popular food protein brands on U.S. restaurant menus.

RESULTS: ALASKA SEAFOOD IS THE #1 BRAND AMONG PROTEINS ON U.S. MENUS

- Alaska Seafood is the most commonly-mened protein brand on U.S. menus.

Source, Datassential for ASMI, 2016. Study will be updated in FY18.

Goal 2: Increase the first wholesale value of selected Alaska salmon products by 0.5 percent annually

ANALYSIS OF RESULTS AND CHALLENGES:

- The average first wholesale value of Alaska salmon sold in 2015 and 2016 was \$1,326 million, compared to \$900 million in 2006/2007 (10-years prior), yielding a compound annual growth rate of 4.4 percent over the past decade.
- The average ex-vessel value of Alaska salmon in 2015 and 2016 was \$481 million, compared to \$370 million in 2006/2007 (10-years prior), yielding a compound annual growth rate of 3.0 percent.
- The compound annual growth rate of ex-vessel value and first wholesale value over the past 10 years is well above the 0.5 percent annual goal.
- Final data on the 2017 season is not yet available; however, the preliminary ex-vessel value of Alaska salmon, \$679 million, was 67 percent above 2016, and 64 percent better than the 2015 preliminary value.

The bullet points above use two-year averages as a basis for comparison because pink salmon harvests tend to spike significantly in odd-numbered years.

Ex-vessel value refers to the value of payments made to fishermen by processors for delivering fish. First wholesale value is the revenue received by processors when they sell processed seafood resources outside of their network. ASMI strives to increase the wholesale value of all Alaska seafood products including salmon. While ASMI cannot influence the price paid to fishermen by processors, historical data confirms that fishermen generally receive a larger percentage of the first wholesale resource value when prices are high.

From a resource value perspective, the 2017 season was a great success. Ex-vessel prices for all five salmon species increased, and 2017 will likely rank as the second-most valuable harvest of the past 20 years, once final valuations are tallied (and could possibly eclipse 2013 for the top spot).

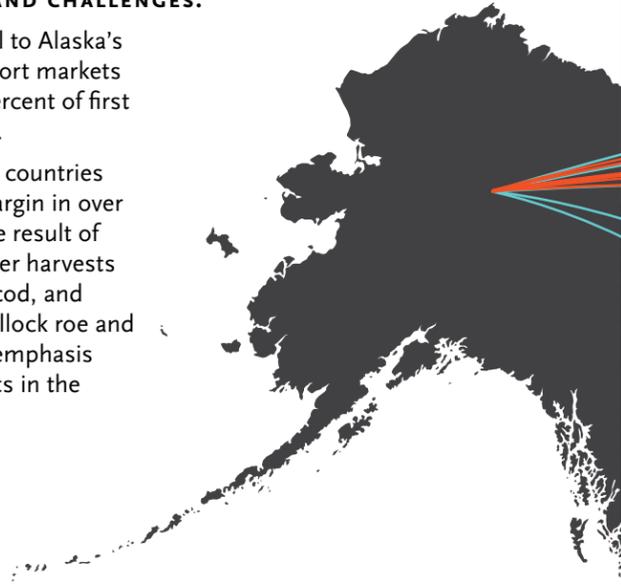
Higher sockeye values were a big driver in 2017. Sockeye harvests were similar to 2016, but the preliminary statewide sockeye price increased 28 percent in 2017. This is largely the result of successful sockeye marketing programs that have expanded demand in the U.S. market for frozen and fresh headed-and-gutted Alaska sockeye. Several other factors provided tailwinds in 2017, including declining keta harvests in Japan, a record Alaska keta harvest, and a slightly weaker U.S. dollar.

Goal 3: Increase the aggregate value of Alaska seafood exports to Alaska Seafood Marketing Institute program destination countries by 0.5 percent annually.

ANALYSIS OF RESULTS AND CHALLENGES:

Export markets are critical to Alaska's seafood industry with export markets accounting for 60 to 70 percent of first wholesale value each year.

Exports to ASMI program countries declined by the largest margin in over a decade in 2016, likely the result of a strong U.S. dollar, smaller harvests of salmon, crab, herring, cod, and sablefish, lower Alaska pollock roe and fillet value, and a greater emphasis on Alaska pollock products in the domestic market.



EXPORT RESULTS ARE AS FOLLOWS:

- Exports to ASMI program countries decreased 11.3 percent by value and 10.8 percent by volume in 2016.
- Exports to program countries have been relatively consistent in recent years but can change significantly from year to year, mostly due to changes in harvest volumes. As a result of this inherent variability, it is instructive to view growth over a longer period. The compound average growth rate in export value is 1.5 percent over the past 10 years, well above the 0.5 percent annual growth goal.
- The compound annual growth rate performance of Alaska seafood exports should also be considered against currency movements, as they have a significant bearing on the value of Alaska seafood products to foreign buyers. From 2007 to 2016, the U.S. dollar index strengthened by 21 percent, or 2.1 percent per year, placing a substantial drag on the growth of Alaska seafood exports.
- The value of exports to Japan – historically the industry's single largest export market – fell 21.0 percent in 2016, exports to China fell 10.3 percent and exports to Europe declined 2.1 percent.
- Salmon and Alaska pollock account for approximately two-thirds of Alaska's total first wholesale value. In 2016, salmon exports declined 15.4 percent by value and 28.1 percent by volume. Export volumes of Alaska pollock were steady, but lower prices on roe and fillet products led to a decrease in value of 5.0 percent. Exports of crab and herring (roe) products also fell sharply in 2016.

Although exports generally declined in 2016, a preliminary analysis of 2017 export performance shows impressive results. Export value gained 13.4 percent overall and exports to ASMI program countries increased 19.3 percent in 2017. Alaska producers sold an estimated \$3.45 billion of seafood to export markets in 2017, the highest nominal export figure on record (back to 2005). This remarkable export growth was largely driven by higher volumes and prices for most Alaska salmon products. Salmon exports increased 43.8 percent in value. A rebound in salmon exports was to be expected, coming off a smaller harvest in 2016. However, despite a similar harvest volume to 2015, the value of salmon exports in 2017 exceeded the 2015 value by 21.7 percent.

ALASKA SEAFOOD EXPORTS TO THE WORLD

2016 Alaska Seafood Exports By Country

ASMI PROGRAM AREAS	Export Volume (in MT)	Export Value (in \$M)
China*	338,011	\$789
Japan	175,204	\$606
Europe	209,834	\$655
» Western Europe	24,227	\$79
» Central Europe	88,829	\$265
» Northern Europe	72,639	\$238
» Southern Europe	16,663	\$49
» Eastern Europe	7,506	\$23
Canada* †	57,216	\$325
Brazil	2,041	\$6.5
TOTAL	782,306	\$2.38B

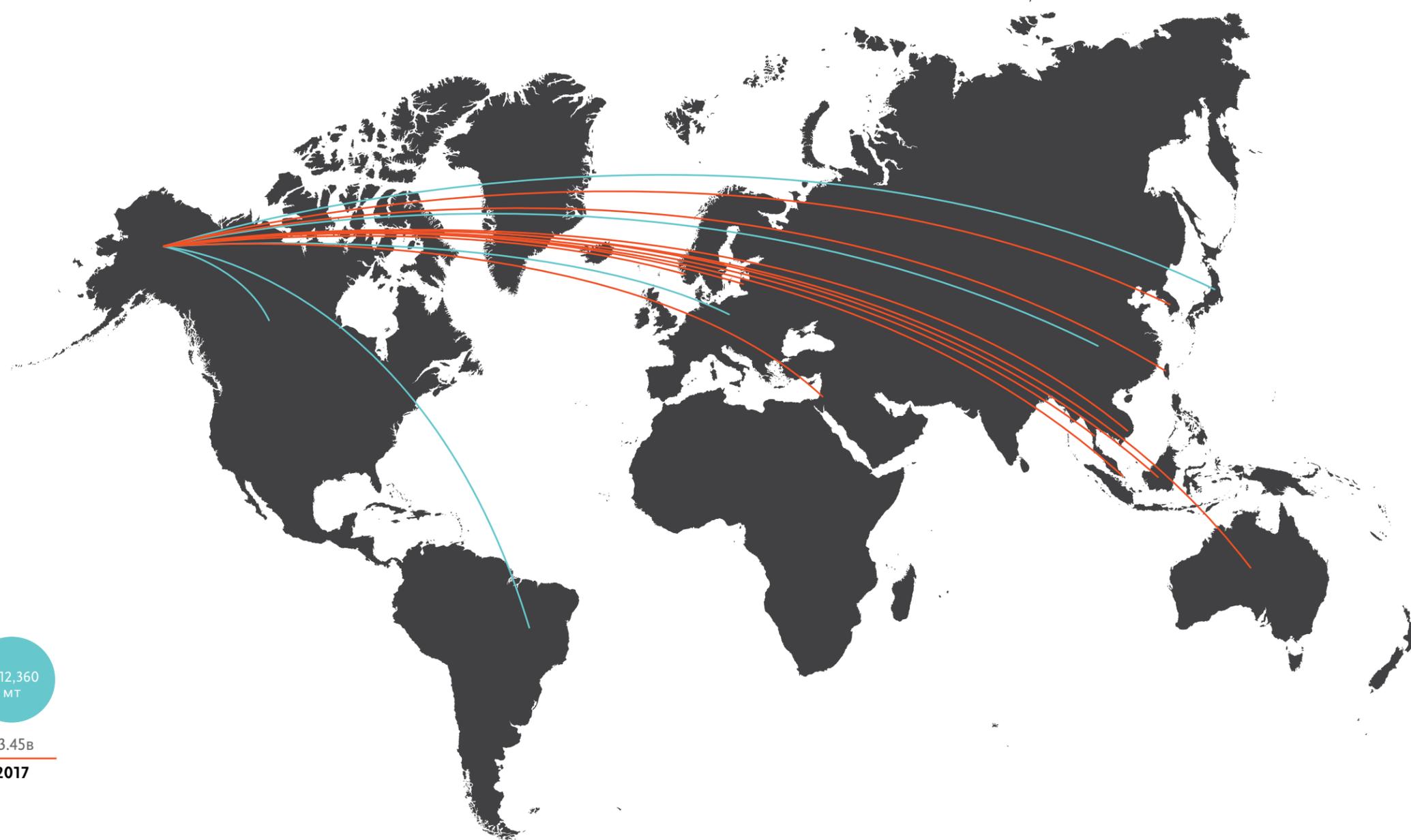
NON-ASMI PROGRAM AREAS	Export Volume (in MT)	Export Value (in \$M)
South Korea*	170,476	\$467
Other Countries	21,335	\$53
Thailand*	12,877	\$38
Australia	6,848	\$29
Lithuania*	7,673	\$22
Taiwan	12,836	\$20
Indonesia	1,112	\$9.5
Israel	921	\$6.6
Vietnam*	2,582	\$6.5
Singapore	268	\$3.5
Norway	1,090	\$3.2
NON-ASMI AREAS TOTAL	238,018	\$658.3

* Major re-export country.

† Canada was included in the Domestic Marketing Program in 2016.

Source: National Marine Fisheries Service Foreign Trade Data, compiled by McDowell Group for Alaska Seafood Marketing Institute.

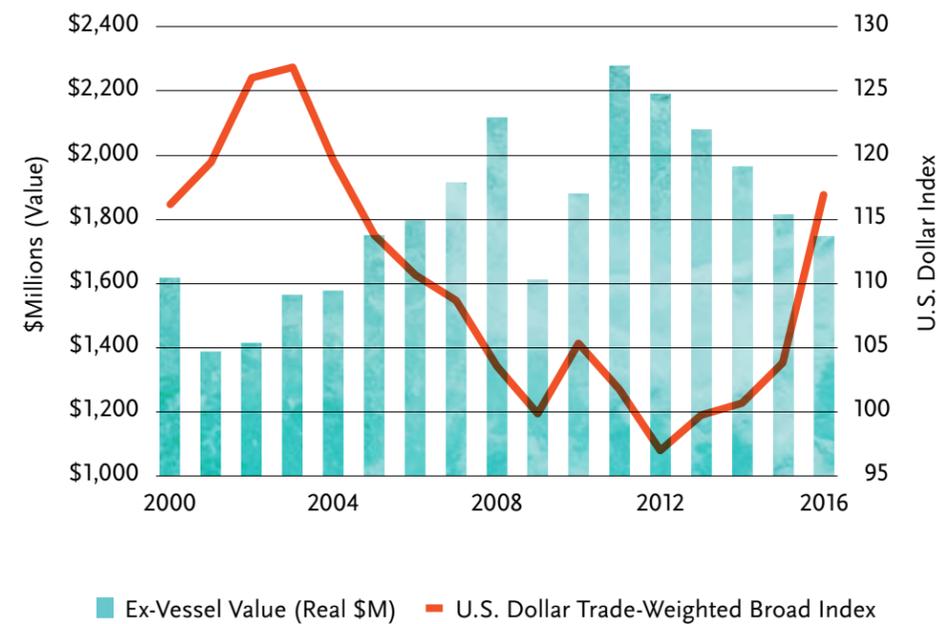
Data reflects direct exports only, product is not necessarily consumed in the country shown.



Exports of Alaska Seafood 2005-2017 *Export Volume in Metric Tons // Export Value in \$Billions*



2016 EX-VESSEL VALUE OF ALASKA SEAFOOD VS. U.S. DOLLAR



Goal 4: Increase the ex-vessel value of key species in Alaska's commercial harvest by 0.5 percent annually.

Alaska seafood competes in a global marketplace. Exchange rates can have a large impact on the value of Alaska seafood. When the U.S. dollar gets stronger (i.e. the dollar index goes up), foreign buyers must pay more of their own currency to achieve the same price in dollars. Foreign competitors are also able to accept lower prices in dollars but retain the same value denominated in their own currency. A strong U.S. dollar, as seen in recent years, generally results in lower seafood values for Alaska producers. Given that the U.S. dollar gained 27 percent on foreign currencies between 2011 and 2015, a decline of 17 percent in ex-vessel value during that period is more understandable.

ANALYSIS OF RESULTS AND CHALLENGES:

The ex-vessel value of Alaska's commercial seafood resource represents payments from processors to commercial fishermen plus an estimated ex-vessel value of product caught by catcher-processors. Increasing the harvest value has a beneficial impact on Alaska communities and revenues for local and state governments.

RESULTS

The ex-vessel value of key commercial seafood species totaled an estimated \$1.75 billion in 2016. Ex-vessel value declined 2.5 percent in 2016; however, this development requires some context. Harvest volumes of key species decreased 7.6 percent, and much of the decline came from salmon, crab and sablefish. These species tend to be relatively more valuable, so lower harvests of these species significantly impact value. Higher prices for salmon, crab and cod largely offset lower harvest volumes.

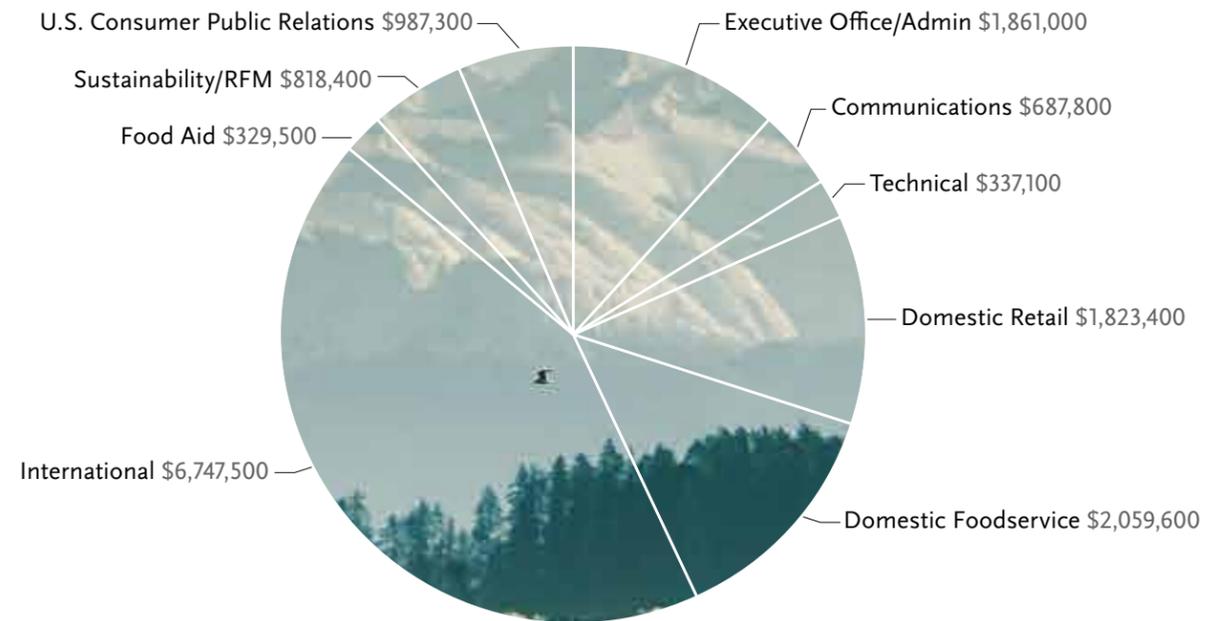
The 10-year compound annual growth rate of key Alaska commercial seafood species decreased to 0.6 percent in 2016, slightly above the 0.5 percent target.

OPPORTUNITIES

Overall harvest value will likely increase in 2017 for the first time since 2011. The 2017 salmon harvest value marks a substantial improvement over 2015 and 2016. Market conditions and Alaska harvest prospects for many Alaska species are either stable or improving, due in part to ASMI efforts.

Processors have continued to invest in developing new products and opening new market channels in recent years, particularly for Alaska pollock, salmon and cod. These developments and potential future endeavors provide ASMI more opportunities to raise the value of these important high-volume species.

ASMI EXPENDITURES



FY2017 Expenditures

Total FY2017 Expenditures: \$15,651,600

Full Time Employees: 20



ASMI REVENUES



FY2017 Revenues

Total FY2017 Revenues: \$15,651,600



CONTACT

ASMI OFFICE

311 N. Franklin Street, Suite 200
Juneau, Alaska 99801
Phone: 1(907) 465-5560 or 1(800) 478-2903
info@alaskaseafood.org

FACEBOOK.COM/alaskaseafood
TWITTER.COM/alaska_seafood
INSTAGRAM.COM/alaskaseafood
PINTEREST.COM/alaskaseafood
YOUTUBE.COM/alaskaseafood
wildalaskaseafood.com
alaskaseafood.org

ADMIN/EXECUTIVE

ALEXA TONKOVICH
Executive Director

SARA TRUITT
Executive Assistant/Board Liaison

COMMUNICATIONS

JEREMY WOODROW
Communications Director

ARIANNA ELNES
Communications Specialist

DOMESTIC MARKETING

VICTORIA PARR
Domestic Director

MEGAN RIDER
Domestic Marketing Manager

SARAH CANNARD
Domestic Marketing Coordinator

EMILY GISLER
Domestic Marketing Coordinator

FISCAL

BECKY MONAGLE
Finance Director

MATTHEW ARNOLDT
Administrative Specialist

NANETTE SOLANOY
Fiscal Assistant Intern

GLOBAL FOOD AID

BRUCE SCHAETLER
Global Food Aid Program Director

INTERNATIONAL

HANNAH LINDOFF
International Program Director

MONICA GEORGE
International Marketing Coordinator

ASHLEY HEIMBIGNER
International Marketing Coordinator

ALICE OTTOSON-MCKEEN
Assistant International Program Coordinator

SUSTAINABILITY

SUSAN MARKS
Sustainability Director

TECHNICAL

MICHAEL KOHAN
Seafood Technical Program Director



Wild, Natural & Sustainable®

311 N. Franklin Street, Suite 200, Juneau, AK 99801-1147

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