



Wild, Natural & Sustainable®

## ALL HANDS 2023 MEETING REPORT

### MARKET OVERVIEW & HIGHLIGHTS

The last few years have been challenging for the Alaska seafood industry. In 2023, at the request of the wild Alaska Pollock (WAP) and Salmon sectors, ASMI's Global Food Aid Program (AGFAP) worked consistently with USDA make sure they understand the value of sustainable wild Alaska seafood to their programs. Hard work is paying off...United States Government (USG) purchases grew well over 2022 numbers in just the first nine months of 2023. It is a win-win for the WAP and Salmon sectors and for USDA as it strives to improve access to healthy seafood products in the growing population of food and nutrition insecure Americans.

Alaska seafood fits perfectly into USDA's programs. It is an easy way to ensure their offerings and their offered meal items are consistent with the latest, science based Dietary Guidelines for Americans (DGA 2020-2025), which include recommendations of two weekly servings of healthful seafood for everyone from 1 year of age. This is a tall order, since there is a wide consumption gap across the seafood category in the USA, and particularly among USDA food and nutrition safety net participants.

While one would not consider US Government sales a marketing plan, there is a huge opportunity for Alaska seafood producers over the next years to expose millions of American consumers to seafood in their diets. AGFAP utilizes the full range of programs and new initiatives available to the seafood category and will continue to work with USDA to expand their Alaska seafood offerings and purchase volumes.

This year again is shaping up to be a very tough one for Alaska seafood, and for the salmon sector most immediately. Currently, all sectors of Alaska seafood are experiencing a demand contraction due to general recessionary trends around the world as well as the lingering market supply disruption from Covid. The effects are significantly magnified by an abundance of cheap Russian products flooding the market at prices as much as 60% lower than those of 2022. Overall marketplace distortions, inflation, a strengthening US dollar and loss of global markets from unfair trade competition led by Russia and China are the biggest factors.

Alaska seafood still comprises the largest share of US Government seafood purchases and includes wild Alaska pollock (WAP) and salmon (Pink and Red/Sockeye). USDA purchases both frozen and canned forms. However, limited cold storage at food banks means that USDA looks towards shelf stable options for food banks that can still supply good protein options to their consumers. At the same time, we are working with USDA to add Keta and Pink salmon fillets to extend their salmon product line as well as other available seafood products that may be available and mutually desired.



## GOVERNMENT SALES IN FY23

This year, the Alaska pollock and salmon industries requested our assistance to access USDA programs and purchases. AGFAP aggressively worked to expand wild Alaska seafood in all food and nutrition programs, through specialized marketing and messaging, leveraging nutrition science and policy, product innovation and development, and advocacy with key agency decision makers and at the level of the Secretary.

*In 2023 to date, USDA has so far purchased \$204+ million of WAP and salmon (Pink and Sockeye/Red). This is already a significant increase over CY 2022's \$160 million purchases.*

Increasing access to nutritious seafood choices in all programs exposes USDA clients to sustainable wild Alaska seafood products they can find in their local grocery stores and which they can seek out as retail customers when they have the economic means to purchase seafood.

Our consistent work with USDA on behalf of Alaska seafood through all channels available – including entitlement programs, Section 32 Authority, Build Back Better and the new Commodity Credit Corporation (CCC) initiative that replaced it -- is resulting in additional purchases beyond the regular baseline annual purchases.

Table 1 provides a snapshot of purchases in FY23.

**Table 1. USDA Purchases – Wild Alaska Salmon, Pollock and Pacific Rockfish, FY23 (1 October 2022 - 30 September 2023)**

	Amount (Lbs)	Price (USD)
<b>2023 WILD ALASKA SALMON</b>	<b>34,144,000</b>	<b>\$127,598,582</b>
K SALMON PINK CAN-24/14.75 OZ	11,800,000	\$29,600,000
SALMON PINK CAN-24/14.75 OZ	10,500,000	\$31,900,000
SALMON RED CAN-24/14.75 OZ	8,100,000	\$36,935,702
SOCKEYE SALMON FILLETS WILD FRZ PKG-40/1 LB	3,744,000	\$29,162,880
<b>2023 WILD ALASKA POLLOCK &amp; ROCKFISH</b>	<b>27,628,000</b>	<b>\$76,456,706</b>
FISH AK PLCK FILLETS FRZ PKG-20/2 LB	11,600,000	\$34,200,000
FISH AK PLCK FRZ BULK CTN-49.5 LB	1,188,000	\$2,483,926
FISH AK POLLOCK STICKS BRD FRZ CTN-40 LB	1,216,000	\$3,594,986
FISH AK POLLOCK STICKS FRZ PKG-20/2 LB	11,500,000	\$28,200,000
PACIFIC ROCKFISH FILLETS FRZ PKG-20/2 LB	2,124,000	\$7,977,794
<b>Total 2023:</b>	<b>61,772,000</b>	<b>\$204,055,288</b>



In 2023, ASMI's Section 32 requests for canned Pink and Red salmon and for frozen fillet portions of Sockeye salmon were all approved by the Secretary of Agriculture with distribution continuing into Spring of 2024. Pacific Rockfish was also purchased under Section 32. Separately, we worked with USDA to purchase WAP through a new program funded by the Commodity Credit Corporation (CCC). Alaska suppliers were very competitive in these solicitations, and more were able to sell into the program in FY23<sup>1</sup>.

## SETTING UP FOR FY24

In September 2023, we submitted FY24's first Section 32 request to the Secretary of Agriculture, at the behest of the Alaska Salmon sector.....It is under review. It includes 14.75oz. Tall canned Pink salmon, Sockeye salmon fillet portions (4oz., PBO, vacpac), Keta salmon fillet portions (4 oz.) and Pink Salmon fillet portions (4oz.), for increased use in food banks and other programs. Since USDA consumers may ask for Sockeye, we notified USDA that canned Sockeye salmon talls and halves will be available to purchase.

We have consistently advised USDA and USAID (US State Department) that there is sufficient canned Pink salmon for traditional USDA food and nutrition programs as well as foreign or domestic food aid that may be needed for refugees in the Ukraine conflict or humanitarian/disaster elsewhere in the world. The USG is allocating \$2.3 billion additional funds to foreign assistance and trade mitigation through USAID and USDA/FAS, so they may be anticipating additional need. In addition to canned Pink salmon, we advise that with sufficient notice, canned herring and canned Alaska pollock could be available in significant volume for international food aid.

## ENSURING SEAFOOD'S PLACE IN US NUTRITION POLICY & PROGRAMS

We work closely with our Alaska Congressional Delegation and a coalition of all seafood stakeholders on ASMI's behalf to promote a consistent science-based seafood message in all US nutrition policy. We consistently dwell on the need for seafood recommendations to be included in the rules for ALL food and nutrition programs. To align with those recommendations, more seafood purchases are needed for the programs.

In addition to our results from Government sales, we share other noteworthy activities of the last year. Our efforts to include Alaska seafood in USG nutrition and policy initiatives in FY23 and FY24 include:

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<sup>1</sup> The United States Government Fiscal Year2023 (FY23) is from 1 October 2022 through 30 September 2022



- **PROMOTING SEAFOOD CONSUMPTION RECOMMENDATIONS:** ASMI GFAP continues to keep its hand in nutrition policy, with the current committee working on the next Dietary Guidelines for Americans (DGA) 2025-2030. We want to make sure that seafood is appropriately represented in their protocols and that the committee continues to recommend at least 2 weekly servings of seafood for Americans of all ages from 12 months old, including pregnant women. Since the DGA is the basis for USG nutrition policy, we advocate that all USG food and nutrition programs adjust to reach these goals. The DGA and USDA programs are excellent channels to expand seafood consumption across America.
- **EXPANDING SEAFOOD INTO ALL UPDATED WIC FOOD PACKAGES:** USDA is updating the food packages in the Women Infants and Children's Supplemental (WIC) program based on the latest nutrition evidence. Working with the Alaska Delegation and a coalition of WIC stakeholders, we made a significant push for expanded seafood in all WIC food packages. We are anxiously awaiting the release of the final rule to make sure this once in a decade opportunity expands seafood to all the packages. This would help USDA make a dent in the lack of seafood consumption among the WIC target groups who stand to benefit most.
- **INCLUDING ALASKA SEAFOOD IN THE FOOD IS MEDICINE INITIATIVE:** The White House (WH) Conference, held a year ago, has gathered momentum to launch the Food is Medicine Initiative. Working with a coalition of Alaska seafood organizations and stakeholders we made sure that seafood was incorporated in recommendations to inform the National Strategy launched at the WH Conference and the more recent Food Is Medicine Initiative. We will be participating in the Food Is Medicine Summit at the end of November in Washington DC and informing the Food is Medicine Institute launched at Tufts in October 2023. Sustainable wild Alaska seafood is well positioned as a nutritious, health promoting nutrient dense food that should be prescribed to Americans at risk of nutrition insecurity. We will work with ASMI to teach doctors and health care providers about the benefits of wild Alaska seafood. The goal is to include Alaska seafood in prescriptions to improve nutrition, promote health and mitigate hunger. This will support the dietary DGA guidelines and the national Strategy that came out of the WH Conference.
- **PROVIDING ADVOCACY & SCIENTIFIC SUPPORT FOR ASMI & ALASKA SEAFOOD:** AGFAP continues its advocacy and scientific support through coalition building, hearings, public and scientific events, and commentin.g on food and nutrition policy initiatives to protect seafood's interests. Our consultant Dr Nina Schlossman engages in nutrition science and policy in Washington DC and globally, on our behalf to support Alaska seafood. Dr. Schlossman further supports ASMI and Alaska seafood through her faculty position at Tufts University Friedman School of Nutrition Science and Policy and her interagency work with the USAID and USDA's food assistance supply chain optimization efforts.



## SUPPORTING INDUSTRY & REACHING MILLIONS OF CONSUMERS

AGFAP leverages its long experience and relationships with Congress, the administration, decision-makers at the USDA, and stakeholders in the food and nutrition community to support the wild Alaska seafood industry through US Government food assistance value chains. Again, at the level of the office of the Secretary, and specific senior USDA management and staff, we facilitate interagency action and advocacy to help and keep our seafood suppliers able to keep our wild Alaska seafood products flowing throughout the USDA system.

AGFAP's focused marketing and science-based approach is helping support USDA's need for nutritious high protein products for its programs. The respect and preference for wild Alaska seafood is solidly established. However, there are other seafood species and new suppliers from a variety of Atlantic, Pacific and Gulf fish and shrimp in the food assistance space. Competition grows as USDA works to get more food out to more people in more places than ever before across the nation. We are constantly at work to position the value and quality of sustainable Alaska Seafood in the programs and navigate the price-point orientation of some programs.

## OUTLOOK

Government purchases should not be viewed as a long-term marketing strategy, as needs vary, and USG priorities and programs shift emphasis over time. They are nevertheless expanding the market for wild Alaska seafood, as more seafood consumer products are introduced through USDA programs. This year, more than 30 million school children tried Wild Alaska Pollock breaded fish sticks, 60 million people of all ages took home Alaska pollock fillet portions, breaded sticks and nuggets as well as canned Pink and Red salmon and Sockeye fillet portions through food banks, tribal distribution and community centers. Seven million women purchase canned salmon in grocery stores through the WIC program.

Continued need is anticipated for nutritious foods across America with renewed attention to seafood. The new public-private "Food is Medicine" initiative we speak of, will surely open opportunities for ASMI to educate chefs, doctors, nurses and other health professionals to the nutrition and health promotion benefits of wild Alaska seafood. ASMI's recipe bank will be a huge resource for consumers and health professionals alike.

We are planning on continued large Alaska seafood purchases in early FY24, to make sure there is a steady and uninterrupted supply for USDA clients. We will continue to position Wild Alaska Seafood as the "go to" option for the USDA, as it navigates evolving nutrition science and policy, and responds to political and economic priorities with its program offerings. To that end, we continue to advise and educate the various USDA agencies on all aspects of Alaska's wild seafood products from harvest to product supply to consumer demand.



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## ALASKA GLOBAL FOOD AID PROGRAM - EXPANDING COMMERCIAL MARKETS ALL HANDS MEETING REPORT

November 2023

USDA now has 6 consumer-ready Alaska seafood species in 13 product forms in frozen or shelf stable options for its clients: Pacific Rockfish (fillets), WAP (sticks, fillet portions, and nuggets), in addition to frozen block that is transformed into consumer products by school districts) and 4 Salmon species – Pink (canned) and Sockeye (canned and fillet portions), Keta (canned) Coho (fillet portions).

We continue to work on getting WAP Nuggets into the school lunch program food catalog, since they are now well established in food banks and commonly consumed across the country in schools.

We are working with USDA staff to include Keta and Pink Salmon fillet portions in FY2024 purchases and position them for inclusion in FY25 USDA foods available.

We are working with USDA Food & Nutrition Service (FNS) and Agricultural Marketing Services (AMS) at the undersecretary level and with senior staff on a sustained basis to provide support as needed. To this end, and at the wish of USDA, we are exploring QR codes for food assistance products with a link to specialized ASMI materials and recipes to introduce and roll out new product forms and species (e.g., Keta and Pink fillet portions).

We are continually working to include ALL of our USDA products permanently in TEFAP programs (regular food bank supply purchases).

This year we are still at it with USDA market development of some new products for USG programs, including a potential salmon nugget, shelf stable forms of wild Alaska Pollock like surimi and canned, and consideration of new species like Pacific Cod.

USDA Food and Nutrition safety net programs continue to feed growing numbers of food insecure Americans and are looking to more seafood options to fill the need and follow seafood recommendations from the Dietary Guidelines for Americans (DGA 2020-2025). These represent opportunities for Alaska Seafood and come with more competition from other seafood sectors across the USA.

We look forward to working with industry again this year to support the Alaska Seafood Industry's priorities and needs as they arise and expand opportunities for new Wild Alaska Seafood products.

Bruce Schactler  
Global Food Aid Program Director