



Whitefish Committee Meeting

November 6th, 2025

1:30-5:00PM AKST

Dillingham/Katmai Room (2nd Floor), Hilton Hotel, Anchorage and Virtual

DRAFT MINUTES

I. Call to Order at 1:36 PM

a. Roll Call and Introduction of Guests

Members present:

Chair Frank O'Hara

Vice Chair Rebecca Skinner

Merle Knapp

Ron Rogness

Julia Ying, Ex Officio

Mike Cusack

Brody Pierson

Daniel Kusakari

Lisa Lee

Cathy DuPuis

Brandan Sherrer

Vanessa Aslanian (virtual)

Other members of the public and ASMI staff were present in person and virtually.

b. Approval of Agenda

Rebecca Skinner moved to approve the agenda; Mike Cusack seconded. No objections; the motion passed.

c. Approval of Minutes from All Hands December 3, 2024 meeting

Rebecca Skinner moved to approve the meeting minutes; Mike Cusack seconded. No objections; the motion passed.

d. ASMI Antitrust Statement

The statement was read aloud by Brody Pierson and made available to the virtual attendees online through the Zoom chat function.

e. Chair Remarks

Chair O'Hara thanked attendees for coming. O'Hara thanked ASMI staff for their efforts and noted that All Hands on Deck just scratches the surface of the services ASMI provides. O'Hara notes that we need to continue to hit the ground running in the coming season.

f. Vice Chair Remarks

Vice Chair Skinner put a plug in for the new committee members to take the training provided by ASMI. Vice Chair Skinner noted that if you haven't attended the training then the way that ASMI runs can be

confusing and the training provides context for the committee structure.

g. **Introduction of Committee**

Chair O'Hara asked the committee to introduce themselves and what species they specialize in. Committee members introduced themselves, their industry affiliations and species they work with.

h. **Public Comment**

No public comment.

II. New Business

Whitefish Species Updates – Committee Roundtable

Pacific Cod

Pierson reported that the global cod supply remains at historic lows. Alaska and the Bering Sea have experienced approximately a 65% reduction in available supply over the past several years, while demand continues to outpace production. Although wholesale prices have increased significantly, retailers have largely absorbed these increases, limiting the impact on consumers. The cod market was challenging throughout 2024 but strengthened toward the end of the year and has continued to improve. Pierson credited ASMI's promotional efforts with helping support demand.

In response to a question from Knapp regarding current market strength, Pierson explained that European markets are the primary driver. European quotas continue to decline due to weak recruitment, and little relief is expected in the near term. Although Russia has indicated it may increase its TAC, scientists are recommending a 21% reduction. Atlantic cod prices have reached record highs, lifting prices across other cod species. Japan has shifted much of its purchasing toward Russian cod, while the U.S. market continues to lead pricing. Large fish remain available in the Bering Sea, with Lent continuing to be the largest seasonal market. Pierson noted that Brazil remains a critical export market, particularly for Christmas and Lent demand. European consumers are increasingly favoring light-salted and wet-salted products, while demand continues to grow for medium-sized J-cut products that require less desalting.

When asked how ASMI can best support the industry, Pierson recommended expanding consumer-facing education that highlights the quality and value of Alaska Pacific cod. As Atlantic cod prices increase, consumers are naturally shifting toward Pacific cod, creating an opportunity to reinforce its premium positioning.

O'Hara agreed, noting that long-time Atlantic cod buyers are increasingly switching to Pacific cod, making it important for ASMI to continue promoting its premium attributes.

Rogness emphasized the importance of differentiating Alaska Pacific cod from competing whitefish species such as tilapia and highlighting the benefits of Alaska's wild-caught fisheries compared to aquaculture. Pierson added that cod is increasingly becoming a premium product rather than a staple, requiring corresponding marketing strategies. He also reported increased market inquiries for pollock H&G products, potentially driven by limited halibut supplies.

Alaska Pollock

Cusack reported that most Alaska pollock markets continue to strengthen, except for surimi, which represents approximately 50–55% of Alaska's annual pollock production. Weakness in the Japanese yen, combined with increased Russian surimi production marketed throughout Asia, continues to pressure the surimi market. Pollock fillet blocks remain strong, and favorable market conditions are expected to continue through 2026 and beyond. Cusack also acknowledged ASMI staff for their work supporting USDA purchases and Food Aid programs.

Lee noted that newly constructed Russian vessels, which are restricted from the European market, are producing significant volumes of lower-grade surimi that are primarily being directed to China. Rogness added that Russian surimi production has substantially increased global supply over the past several years. While additional growth is expected, projections beyond 2030 remain uncertain.

Rogness also reported that Russian pollock fillet production declined during the B season and noted that tariffs have complicated year-over-year trade comparisons. Russian exports to China have declined significantly in 2025, reducing volumes entering European markets. Increased availability of single-frozen products in Europe is expected to benefit Alaska producers.

Committee members also discussed continued strong demand for pollock H&G products, particularly in Korea, where domestic supply remains limited.

China Market and Trade

Jeff Welbourn asked about pollock availability in bonded cold storage. Julia Ying explained that available supplies remain tight. Chinese processors have reduced purchases because of tariff-related uncertainty, and 2025 imports are down more than 30% compared to 2024. Most available H&G production is already committed through existing contracts, leaving limited uncommitted inventory.

DuPuis added that Chinese re-processors continue to prefer frozen-at-sea product, reflecting the product forms they have historically sourced from Russia.

Ying reported several positive trade developments. China has extended the current 10% tariff policy for an additional year, reduced the reciprocal 34% tariff, and resumed applications for certain Section 301 tariff exclusions. These changes may improve opportunities for U.S. flatfish and other Alaska seafood in the Chinese market.

Ying also noted that beginning January 1, 2026, Marine Mammal Protection Act import restrictions are expected to prohibit imports of more than 170 seafood species from non-compliant countries, including Russia. This is expected to reduce competition from Russian products and improve opportunities for Alaska seafood in the U.S. market.

Ying further observed that broader economic uncertainty and changing consumer spending patterns may encourage greater use of Alaska whitefish species, including yellowfin sole, as cost-effective alternatives. Continued tariff relief would also help stabilize production costs for Alaska seafood.

Committee members also discussed uncertainty surrounding future harvest quotas and their potential market impacts.

Atka Mackerel and Pacific Ocean Perch

Daniel Kusakari reported that Atka mackerel quotas have increased in both Alaska and Russia. Demand remains steady due to limited supplies from Japanese fisheries and strong foodservice demand supported by tourism in Japan. Expected reductions in Atlantic mackerel quotas next year may provide additional market opportunities for Alaska products.

Pacific Ocean perch quotas declined this year, resulting in tighter supplies. While Japan remains the primary market, demand is expanding throughout other Asian markets and Europe. Kusakari emphasized the importance of continued ASMI marketing efforts in Japan.

Committee members also discussed product quality characteristics, including the importance of maintaining the red skin appearance preferred by Japanese consumers.

Herring

Skinner reported on changes to the Kodiak herring fishery management program that allowed limited fall participation by permit holders in 2025. Participation was minimal, and harvest data remain confidential because of the small number of participants. The ultimate end use of the harvested herring is currently unknown.

Allen Kimball (board member) noted that the Alaska herring fishery is pursuing certification and recommended that the Board consider appointing a herring representative to the Whitefish Committee to ensure adequate species representation and support.

III. Discussion and answers to Board's Species Questions for the Whitefish Committee (see attached)

Considering adding Alaska to surimi for marketing purposes.

Tim Welsh added that OMRs are the boots on the ground, but they require industry participation for support.

IV. Chair and Vice Chair Elections

Cathy Dupois was elected Chair.

Daniel Kusakari was elected Vice-Chair.

No objections; the elections passed.

V. Good of the Order

Knapp commended the Chair and Vice Chair for their efforts.

Cusack noted that the government shutdown has having ramifications for federal fisheries.

VI. Adjourn

Motion to adjourn by Knapp; Sherrer seconded. No objections; the motion passed. Meeting adjourned at 3:43 PM.



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2025 ASMI All Hands on Deck

Answers to ASMI Species Committee Questions – **WHITEFISH**

1. How are changes in foreign trade policies impacting your species? Are you experiencing or do you foresee shifts in exports markets/regions for your species? If so, where and how?

Within the purview of the Whitefish committee, surimi is the largest issue in the foreign trade sphere. The US dollar is strong against the weakened yen, and Russia is systematically filling every market they can with surimi. Because of trade policy restrictions, Russia is flooding the Japanese market with lower quality and lower cost surimi. Alaska needs to find new markets for surimi including in the US domestic market.

Tariffs continue to impact where Alaska's fish can efficiently be reprocessed. The industry needs to move away from traditional reprocessing hubs like China and move towards Europe, SE Asia and US.

Import policies of places like Indonesia can create hurdles for Alaska suppliers. Cannot ship products to Indonesia if it is trans-shipped, it has to be shipped directly from Alaska to Indonesia. Coordination of discussions with FAS and other governmental agencies would be helpful from the ASMI side.

China is not allowing waste from fish products to enter their domestic market. This is a non-tariff barrier to trade that will have an impact on reprocessing costs. As an industry we need to figure out what to do with 10k tons, and it will have a massive impact on China. This incremental cost will affect suppliers.

2. What do your species need from ASMI to be immediately successful in the marketplace? Any immediate challenges that ASMI should address.

○ What opportunities do you see for your species in international markets?

- Surimi needs help with promotions in Japan and Korea.
- Keep YFS as a priority species and continue to support/promote this.
- Work with Japan OMRs to place the Alaska seafood logo on Atka mackerel packages in 711 Capitalize on the Norwegian mackerel decline, and highlight Alaska seafood as filling the gap.
- Focus on LATAM promotions through recipe development.

○ What opportunities do you see for your species in the US domestic market?

- Growing demand for sushi and poke type applications were discussed in the Circana presentation, so continue to capitalize on that. Younger consumers eat more sushi than previous generations so there is room to benefit from this generational preference.
- Continue with flatfish promotions at retail and foodservice.

○ Are there any immediate challenges that ASMI should address or monitor?

As we all know, the marketplace can change quickly. Whitefish is currently doing well in terms of inventory and pricing but that does not mean that ASMI should take its foot off the gas, and ASMI should continue to educate consumers.

3. Are there any marketing or technical resources that ASMI could provide to support your species? Examples include, but aren't limited to, messaging or talking points, photo or video assets, educational tools, and

quality, health, safety or nutritional information or products. If necessary, please prioritize requests.

A request for more videos of flounder and sole that are market worthy and consumer facing. For example we would like more assets of people working in the fishery, harvesting, and imagery that tells the story of these fisheries.

Work with the technical program to identify the nutritional value of whitefish offcuts that can be utilized for pet food.

4. What is the most valuable service or product that ASMI provides for your company/business/organization?

- Photos, videos, marketing materials.
- Consistent, year round marketing efforts
- Having boots on the ground in international markets, OMR work is very valuable. Someone who understands the culture and language of the market is very essential.
- Trade shows are very expensive but it is nice that ASMI can offset some of those costs. Without ASMI the industry would be fragmented, if we were present at all. The service, food, and drinks are five stars and this sets a good precedent within the B2B world of promoting our products.
- Promotions
- B-roll inventory has been helpful on NetX.
Training materials for new employees – ASMI has been a great resource.
- POS materials are useful as well.
- Samples Bank program – customers who want to work with the fish, can utilize the samples bank program to support the expansion of Alaska seafood in international markets.
- Technical topics like Fukushima and mercury questions – there was a research study about endangered sharks. The first thing you do is contact the Technical committee for support.

5. The word ‘sustainability’ has become ubiquitous in the marketplace. How should Alaska differentiate itself? What does Alaska do that no one else does? Are there non-sustainability stories that could be highlighted to better tell the Alaska story?

*The pristine waters, coastline, and the imagery of Alaska is imperative for ASMI to tell the story of Alaska fisheries. Continue to emphasize ASMI’s 5 pillars of sustainability: fisheries management, families and communities, resources utilization, social responsibility and certification.

*Refine our messaging around how progressive the industry is in relation to their gear, the selectivity of their gear, the proactive improvements that are made in the fisheries/industry. Loved the slinky pot video to tell the story of creating a solution and implementing that. We have lots of examples of this in Whitefish that we could highlight.

*Sustainability in Alaska is multi-faceted, multi-generational and multipronged. Demonstrate that our fisheries management is constantly evolving to ensure fisheries are sustained.

*Ensure that we present a united front about Alaska fisheries inside and outside ASMI activities.

6. The Alaska seafood industry plays an important role supporting ASMI and promoting the Alaska Seafood brand. Please share some examples of how your harvest group, business, affiliate organization or company supports ASMI or effectively promotes the Alaska Seafood brand.

- ASMI logo on consumer packaging
- Industry participation in trade missions around the globe, as well as inbound ASMI missions and fam trips around the globe
- Tours of processing plants and vessels
- Regular communication between different marketing organizations like GAPP and WASA