

Economic Engine for All Alaskans.

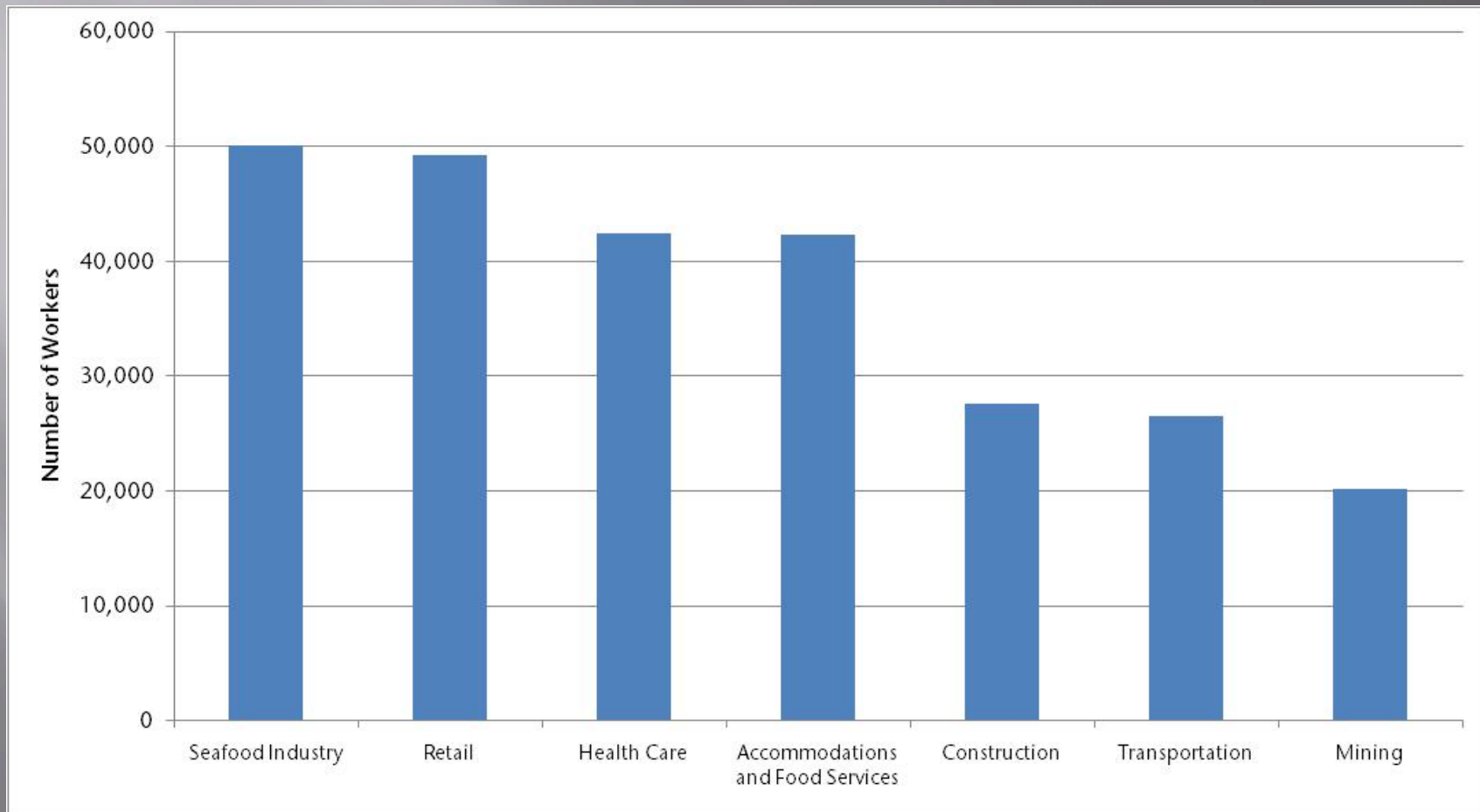
Alaska's Commercial Fisheries

- ▣ *If Alaska were a nation, it would place 9th among seafood producing countries.*
- ▣ *Alaska is the top producer of wild, high-value salmon, producing nearly 80 percent of the world Supply.*
- ▣ *The groundfish fishery in the waters off Alaska is among the largest fisheries in the world.*

Alaska Seafood Industry Economic Impacts

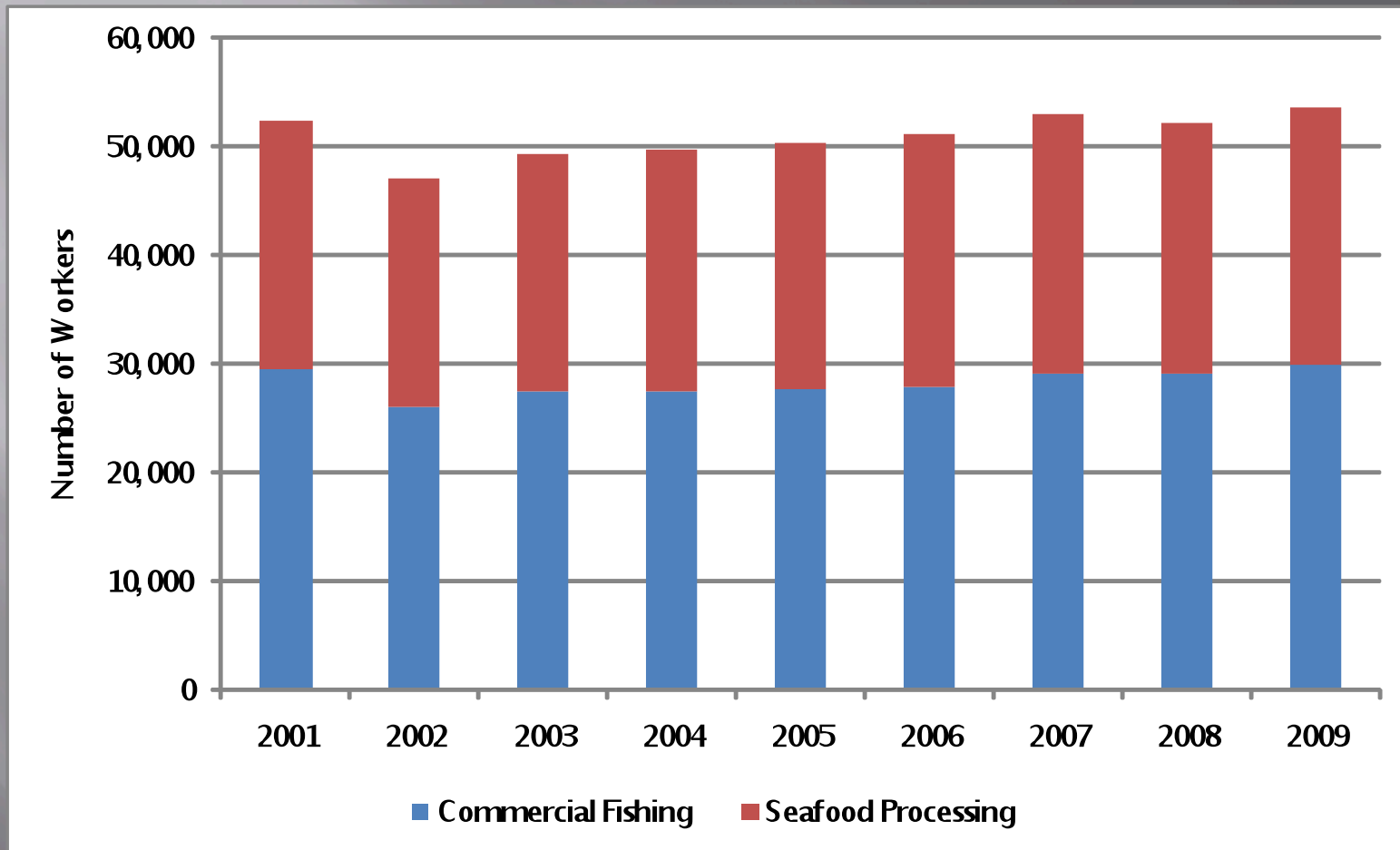


Seafood Industry is Alaska's Largest Private Sector Employer



Source: DOLWD.

Alaska's Seafood Industry Employs Over 50,000 People



Source: DOLWD.

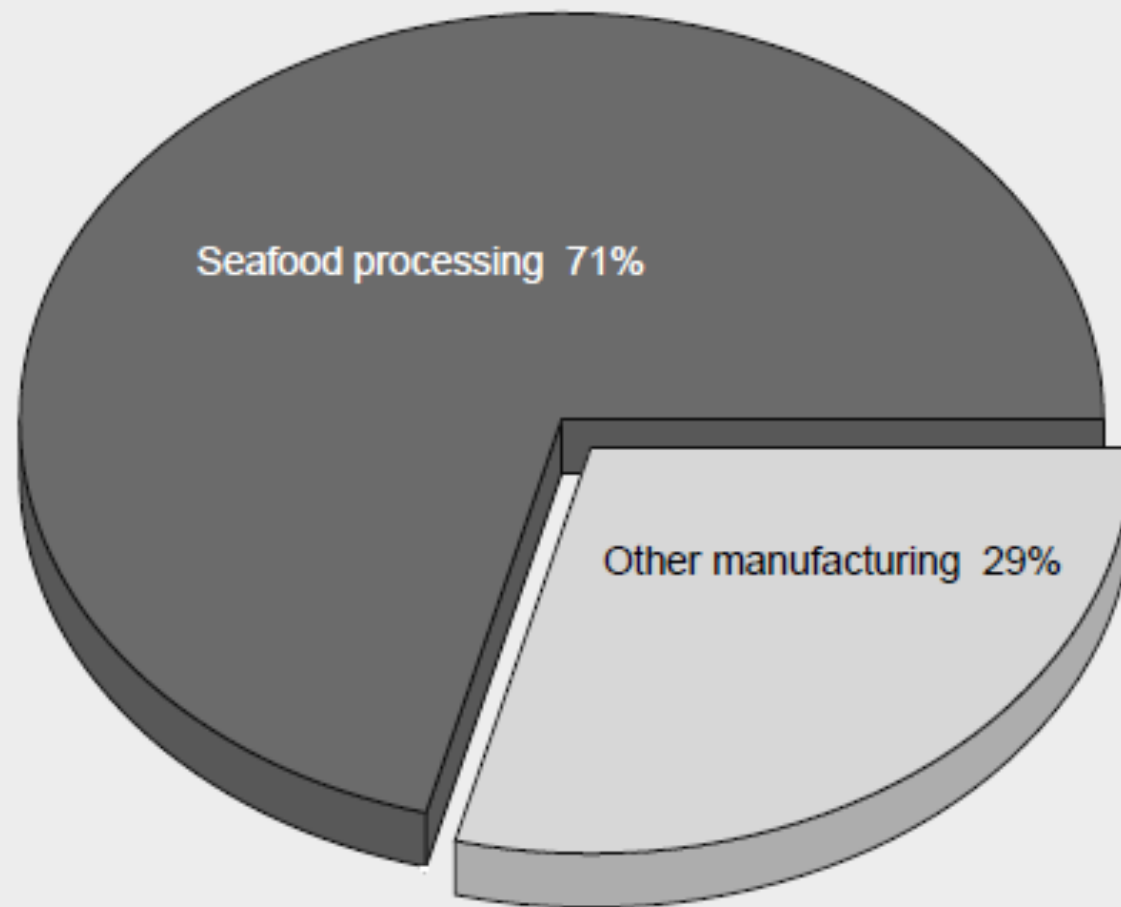
Harvesting Workforce & Gross Earnings 2009

Total Individuals who fished/permits-	10,529
Total Workforce(permits and crew)-	40,192
Total Gross Earnings / permit holders	\$1,215,553,504

*One in 7 rural residents over the age of 15 was directly employed in the seafood industry during 2009.

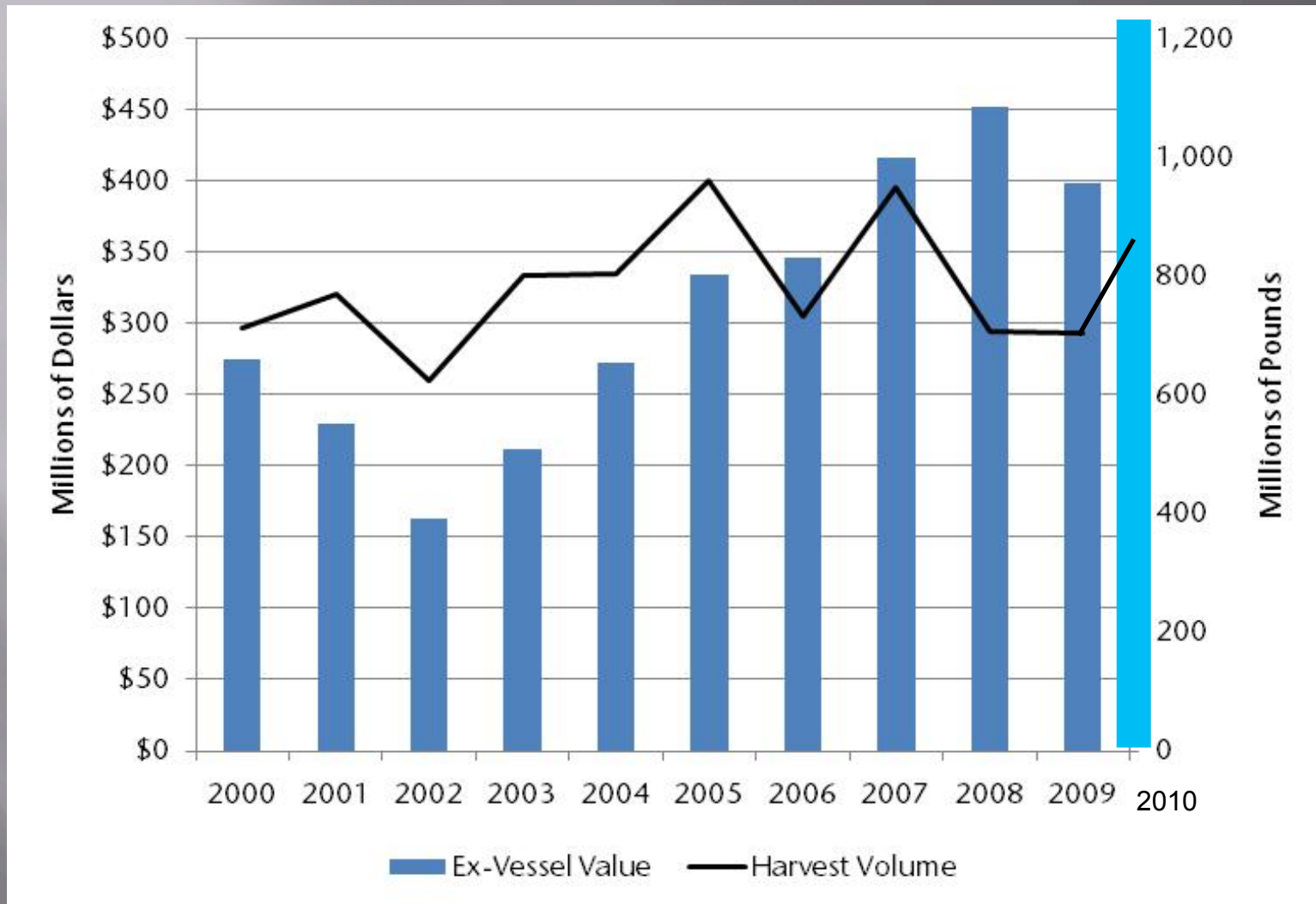
*The Community Development Quota program (CDQ), an allocation of the Bering Sea catch given to coastal communities generates more than \$100 million in revenue annually, employs 2,000 workers, pays \$15 million in wages and invests millions more in training.

“Other” Manufacturing Employs Few Alaska, 2009



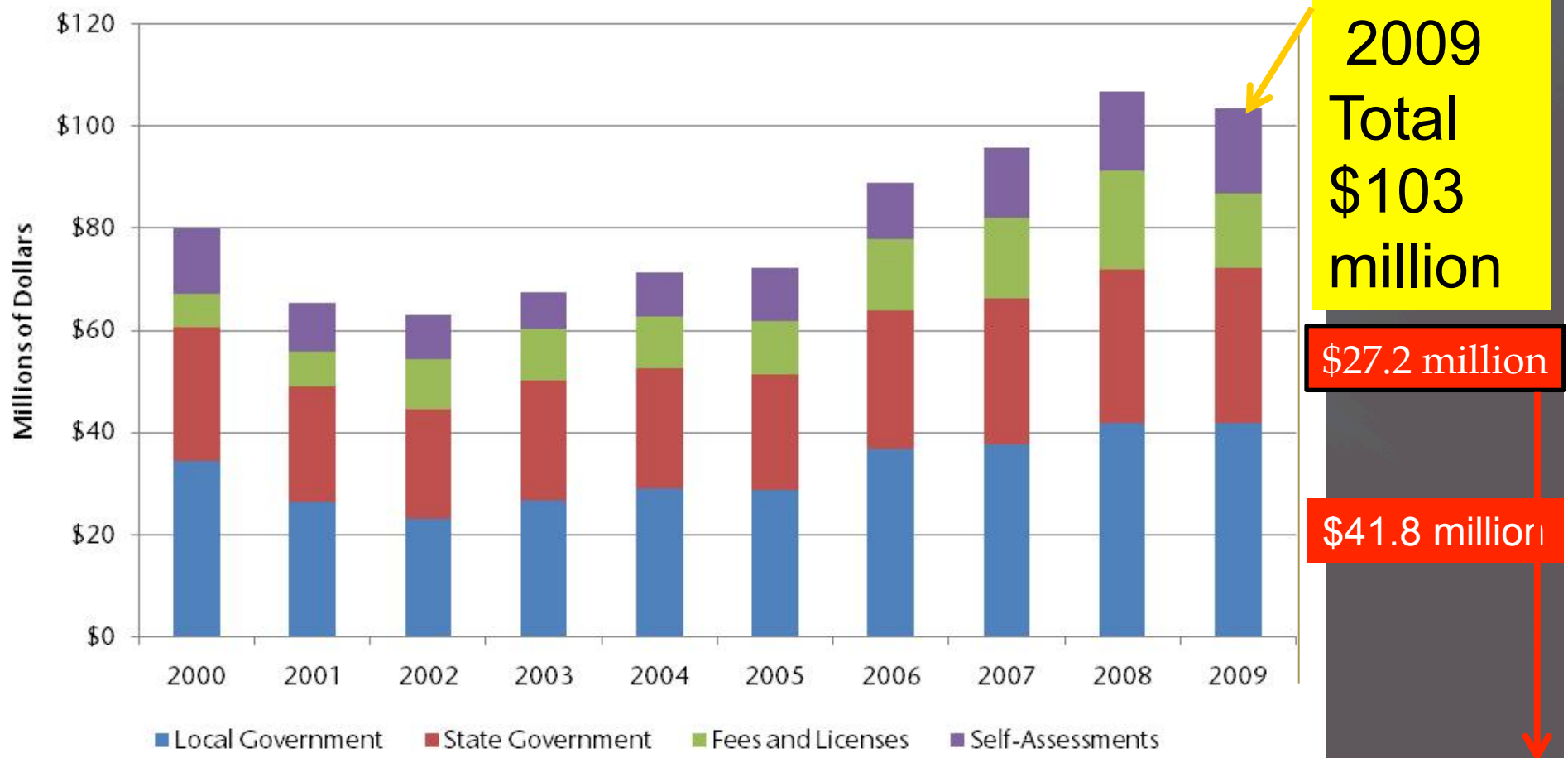
Source: Alaska Department of Labor and Workforce Development, Research and Analysis Section

Value and Volume of Alaska Salmon



Source: ADF&G

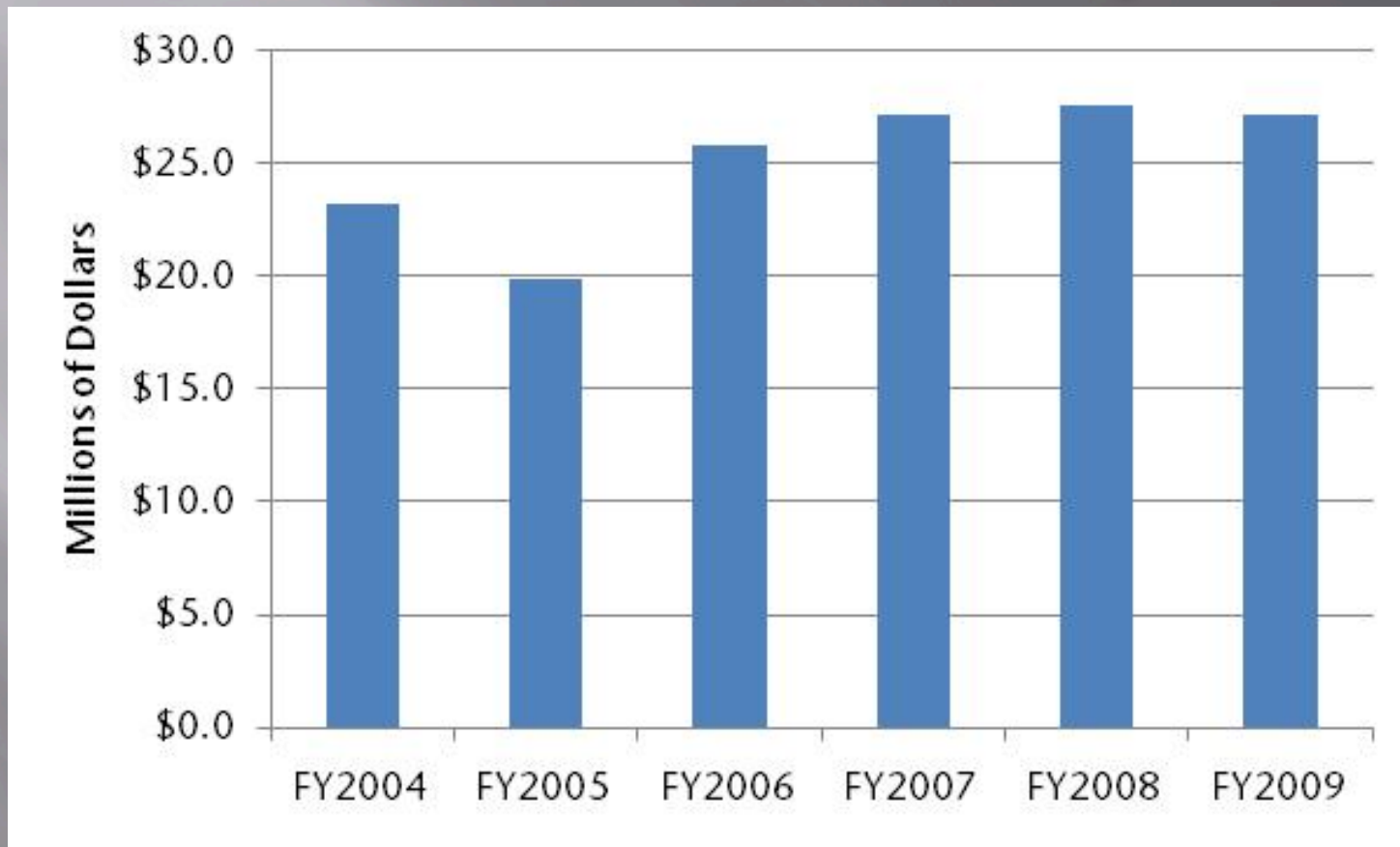
Seafood Industry Taxes, Fees and Self-Assessments



2009- \$ 69 Million total to State & Local Governments

Sources: DOR, OMB, DCCED, NOAA and McDowell Group estimates.

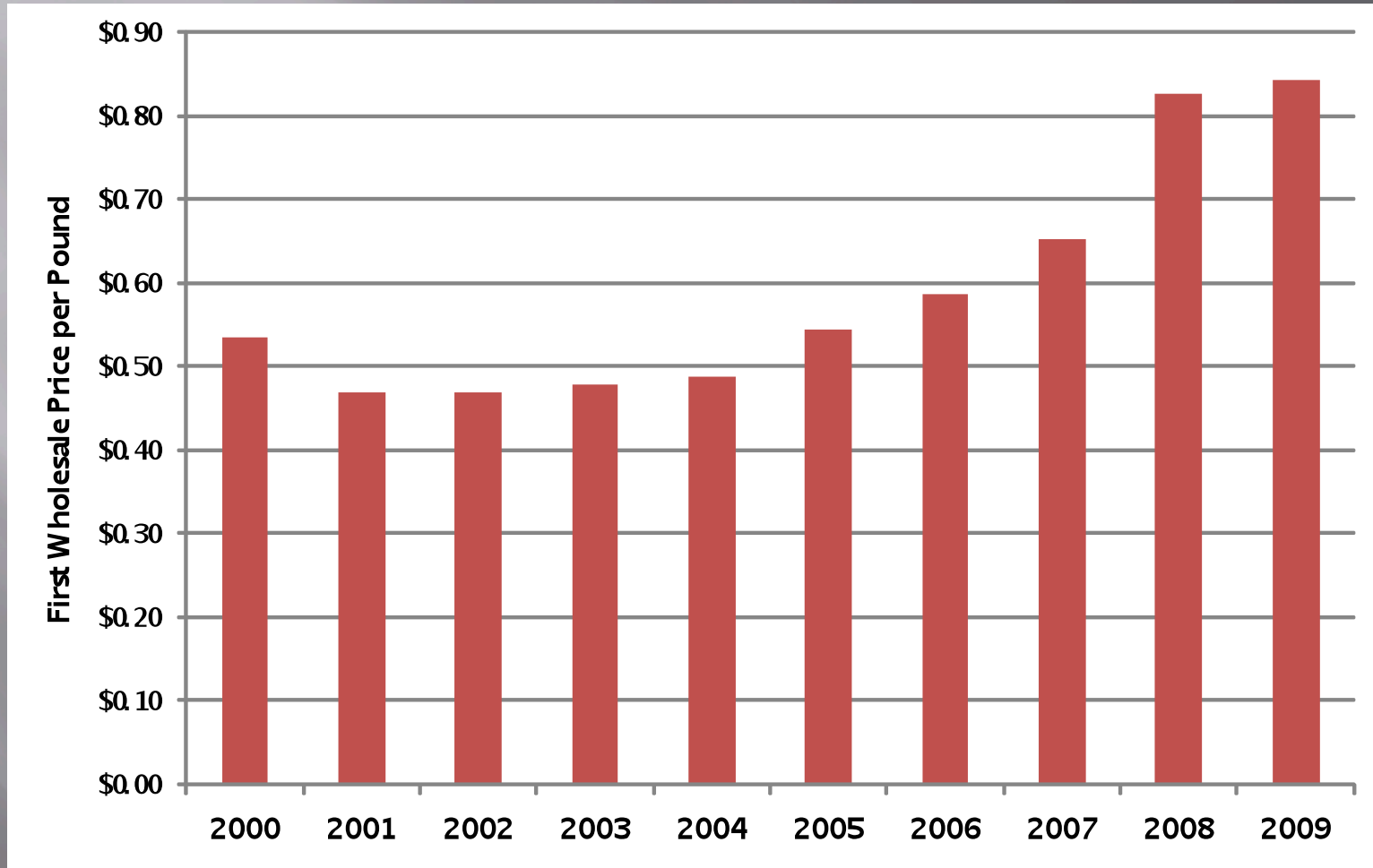
Seafood Contributions to the State General Fund (last 6 years)



Source: DOR.

Total of \$ 151 million over last 6 years.

Alaska is Realizing More Value per Pound of Seafood Sold



Source: ADF&G, NOAA, and McDowell Group Estimates.

State Commercial Landings — 2008 Volume

Washington surpasses Virginia at #3 Ranking

08 RANK	STATE	'000 LBS	07 RANK	08 RANK	STATE	'000 Lbs	07 RANK
1	Alaska	4,533,624	1	16	New York	33,865	16
2	Louisiana	915,956	2	17	Hawaii	30,651	18
3	Washington	568,647	4	18	Florida, EC	26,103	12
4	Virginia	415,719	3	19	Alabama	24,534	17
5	Massachusetts	326,064	6	20	New Hampshire	10,951	22
6	California	321,145	5	21	Michigan	9,998	19
7	Mississippi	201,822	9	22	South Carolina	9,948	21
8	Oregon	195,733	7	23	Georgia	8,639	23
9	Maine	174,478	8	24	Connecticut	7,073	20
10	New Jersey	162,463	10	25	Delaware	4,598	24
11	Texas	72,469	11	26	Ohio	4,493	26
12	Rhode Island	71,707	13	27	Wisconsin	3,376	25
13	North Carolina	71,331	14	28	Minnesota	318	27
14	Maryland	61,372	15	29	Pennsylvania	50	28
15	Florida, WC	58,643	12				

Source: NMFS

Alaska landings are 55% of the total of the USA 8.4 Billion Pounds

State Commercial Landings — 2008 Value

Alaska Landings Top \$1.7 Billion

08 RANK	STATE	\$ '000	07 RANK	08 RANK	STATE	\$ '000	07 RANK
1	Alaska	1,700,852	1	16	New York	57,188	15
2	Massachusetts	399,623	2	17	Florida, EC	50,322	7
3	Maine	287,451	3	18	Alabama	44,234	17
4	Louisiana	272,857	4	19	Mississippi	43,697	19
5	Washington	250,799	5	20	New Hampshire	20,789	20
6	Texas	174,621	6	21	South Carolina	17,526	21
7	New Jersey	168,653	8	22	Connecticut	17,148	18
8	Florida, WC	162,182	7	23	Georgia	12,523	22
9	Virginia	145,553	9	24	Michigan	7,448	24
10	California	119,486	10	25	Delaware	6,714	23
11	Oregon	103,096	11	26	Ohio	5,315	25
12	North Carolina	86,716	14	27	Wisconsin	3,641	26
13	Hawaii	84,878	13	28	Minnesota	158	27
14	Maryland	73,505	16	29	Pennsylvania	140	28
15	Rhode Island	66,640	12				

Table 2.5, Source: NMFS

Alaska Landings value is 39% of the total of \$ 4.4 Billion and equal to the combined value of the next 7 states.

Leading U.S. Fishery Ports 2007–2008

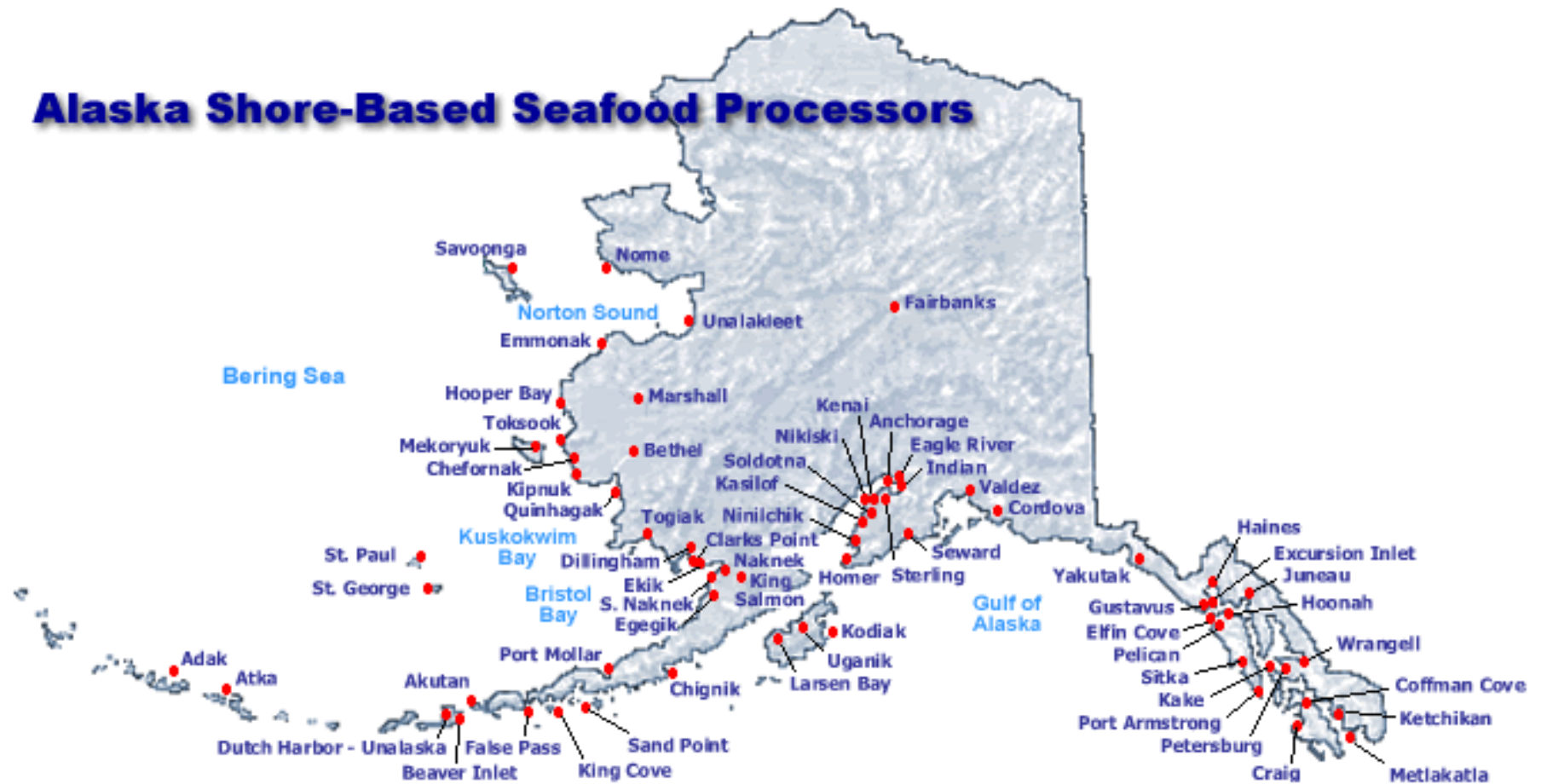
Port	Quantity Million Pounds		Port	Value \$ Million	
	2007	2008		2007	2008
Dutch Harbor-Unalaska, AK	777.1	612.7	New Bedford, MA	268.9	241.3
Reedville, VA	421.1	354.2	Dutch Harbor-Unalaska, AK	174.1	195.0
Empire-Venice, LA	323.1	353.2	Kodiak, AK	126.0	98.7
Intracoastal City, LA	299.7	254.6	Cape May-Wildwood, NJ	57.7	73.7
Kodiak, AK	320.2	250.9	Honolulu, HI	64.3	73.3
Pascagoula-Moss Point, MS	216.3	190.2	Hampton Roads Area, VA	71.2	72.3
Cameron, LA	211.1	171.9	Naknek-King Salmon, AK	61.8	65.3
New Bedford, MA	150.0	146.4	Empire-Venice, LA	73.5	62.9
Los Angeles, CA	141.3	123.6	Gloucester, MA	46.9	54.2
Gloucester, MA	94.5	120.2	Cordova, AK	49.9	50.4
Westport, WA	120.0	111.1	Brownsville-Port Isabel, TX	49.7	49.3
Naknek-King Salmon, AK	115.6	105.2	Dulac-Chauvin, LA	35.5	48.9
Astoria, OR	152.6	99.7	Sitka, AK	50.8	48.2
Cordova, AK	108.8	95.7	Westport, WA	32.0	43.4
Cape May-Wildwood, NJ	68.4	82.9	Port Arthur, TX	39.0	39.0
Moss Landing, CA	96.3	73.5	Key West, FL	40.5	38.7
Newport, OR	64.7	57.8	Point Judith, RI	36.7	36.9
Sitka, AK	55.5	52.7	Intracoastal City, LA	43.7	36.6
Port Hueneme-Oxnard-Ventura, CA	94.5	46.3	Bayou LaBatre, AL	39.0	36.0
Ketchikan, AK	83.5	46.0	Galveston, TX	40.1	33.0

Table 7.2, Source: NMFS

Alaska ports=over 1.2 million lbs or 35% of the total of 3.4 million lbs and, \$ 457.6 million or 34% of the total of \$ 1.4 Billion Dollars

Over 55% of America's commercial seafood is caught in Alaska.

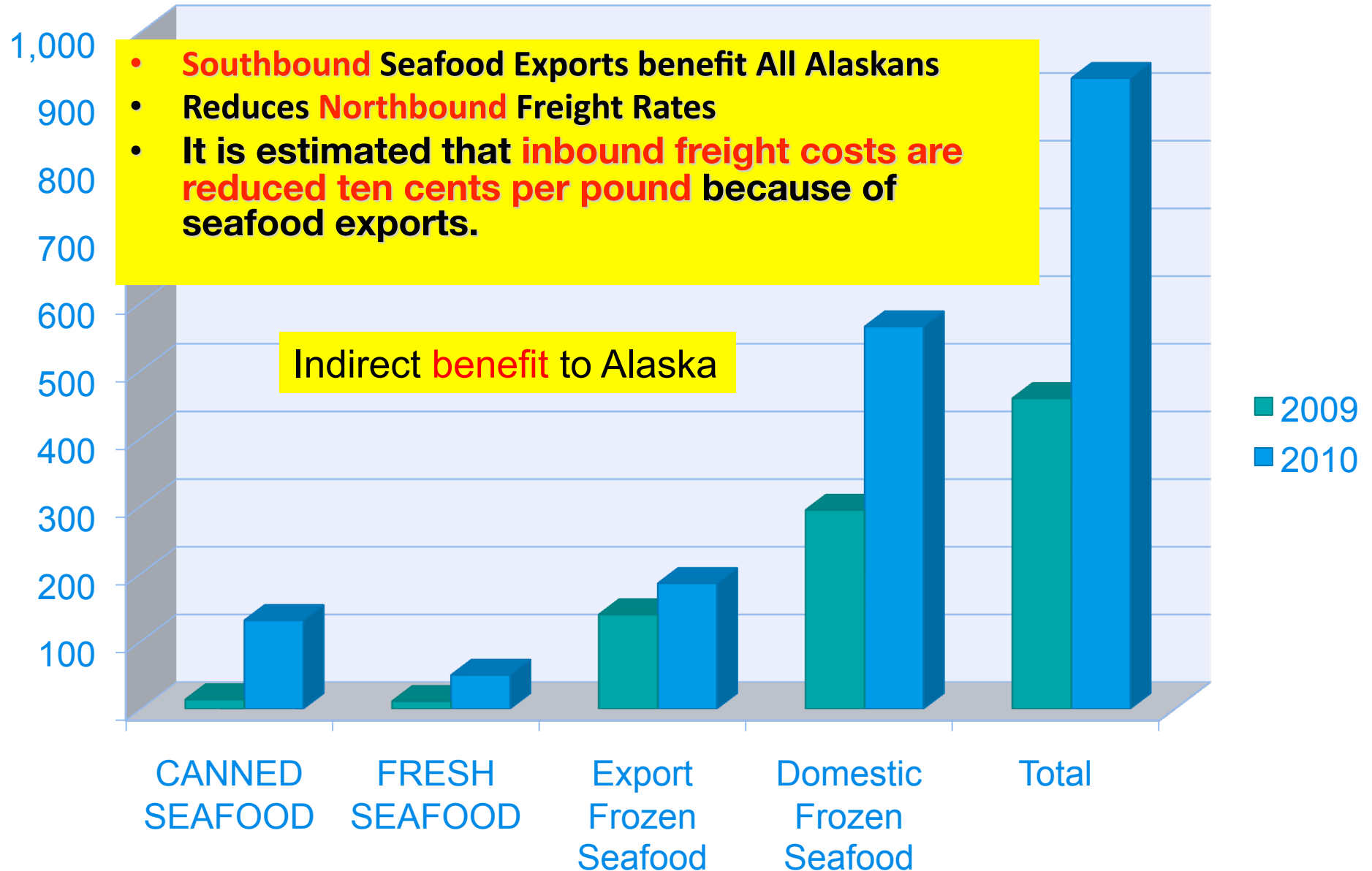
Alaska Shore-Based Seafood Processors





BUILT FOR ALASKA

TOTE Southbound Seafood Volumes 2009 and 2010



EXCERPT FROM THE ALASKA CONSTITUTION

Article 8 – Natural Resources Section 4. Sustained Yield

Fish, forests, wildlife, grasslands, and all other replenishable resources belonging to the State shall be utilized, developed, and maintained on the sustained yield principle, subject to preferences among beneficial uses.

Adopted by the Constitutional Convention February 5, 1956
Ratified by the people of Alaska April 24, 1956
Became operative with the formal proclamation of Alaska statehood January 3, 1959

Fisheries Management Methods in Alaska-

Enforced by the National Marine Fisheries Service and the Alaska Department of Fish & Game-

An important method is Total Allowable Catch (TAC) – set as a firm limit, beyond which fishing must stop

Balancing finite fish stocks with improvements in catching efficiency are regulated by:

Time-and-area closures: These methods allow fishing during certain times or in certain areas, but not in others

Restrictions on size of boats: Certain fisheries have limits on the size of fishing boats

Restrictions on type of fishing gear: Virtually every fishery has limitations on fishing

gear, such as the size, design, and use of each type of gear

Gear prohibition: Certain gear types are completely prohibited, such as pelagic longlines, sunken gillnets, and fish traps

Alaska also limits the number of harvesters in a fishery through “license limitation” or “limited entry”

Additionally, Alaska uses rationalization (also known as “rights-based” management), which grants ownership rights to a given fraction of an annual Total Allowable Catch, and “inseason” modification to adapt to the realities of the run, the weather, and other parameters

ASMI Mission:

Increase the economic value of the Alaska seafood resource

Alaska's official seafood promotion arm,
supports Alaska seafood industry
through promotion in the Domestic and
International markets of Alaska seafood
products, education and research



Wild, Natural & Sustainable®

The Alaska Seafood Marketing Institute

- ▣ **Partnership** of public and private sectors
- ▣ **Public corporation** that fosters effective alignment with industry marketing efforts
- ▣ **Governor-appointed Board** of Directors: five processors, two commercial harvesters
- ▣ **Alaska's official seafood promotion arm**, supports Alaska seafood industry
- ▣ through promotion of Alaska seafood products, education and research

ASMI Revenue Sources

- **Industry Assessment** (voluntary processor tax)
- **State of Alaska -GF**
- **Federal Market Access Program (MAP)**- International Program currently receives over half of its funding from MAP, which is administered by the Foreign Agricultural Service (FAS).





Wild, Natural & Sustainable®

The Power of the ALASKA SEAFOOD Brand

“82% of consumers surveyed say that seeing the Alaska Seafood logo would increase their likelihood to purchase.”

- TRD Frameworks 2009

Wild Alaska **SEAFOOD**

“One third of consumers report increased consumption of frozen seafood over the past two years.”

- TRD Frameworks 2009

Consumer Motivation:

- 75% of consumers surveyed feel it is important to know the source or origin of the fish they purchase.
 - 72% feel it is important the fish they purchase is environmentally sustainable.
 - 68% feel it is important that the fish they purchase is naturally caught or wild.
- 64% of consumers prefer fish or seafood caught in the ocean over farm-raised fish.

Preference for Alaska:

- Branding with either the Alaska Seafood logo or the name “Alaska” are both positive influencers of purchase behavior and create a positive impression of retailers:
 - Use of the word “Alaska” on packaging increases likelihood to purchase among 76% of consumers surveyed.
 - 82% of consumers surveyed say that seeing the Alaska Seafood logo would increase their likelihood to purchase.
- Alaska salmon is preferred by 61% of consumers; no other type of salmon even comes close to this type of preference.

**Source: TRD Frameworks 2009. Respondents were college educated, upper income grocery shoppers, ages 25-74.*

Wild, Natural & Sustainable



wild alaska seafood WEEK

October 5-8th

SALMON, SCALLOPS, HALIBUT, AND COD.

Come taste and learn why Alaska is the natural state for wild and sustainable seafood. A model for quality, purity and responsible fishing practices; Alaska Seafood is also the perfect ingredient for healthy flavor.



SPEAKER

KABIL LURIE, a former Alaskan fisherman, will speak on seafood sustainability and health.

THURSDAY, OCTOBER 8TH AT 7PM IN THE BERKSHIRE ROOM



GUEST CHEF
NACOM EVERETT, chef and culinary arts instructor, will showcase recipes utilizing Alaska's amazing resources.

THURSDAY, OCTOBER 8TH, 5-8PM IN THE BERKSHIRE DC



SALMÓN SALVAJE ROJO (sockeye) DE ALASKA

Su carne, firme y poco grasa, destaca por el color rojo intenso. Crudo, marinado, ahumado o asado, transmite el auténtico sabor del salmón natural.

like THEIR FATHERS before THEM



Alaska's Generations of Sustainability



See who's behind the great flavor of Alaska seafood.

- Alaska Salmon
- Alaska Whitefish
- Alaska Shellfish



MEET THE FISHERMEN

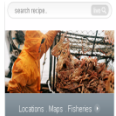
- THE HOLLAND FAMILY | Kodiak
- JOE WILSON | Bristol Bay
- WHEELER & SON | MARSHFIELD | Sitka Bay
- JAMES STRONG | Dutch Harbor

FISHERMEN'S FAVORITE RECIPES

- Spicy Alaska Salmon Wraps
- Crab Cakes Alaska Salmon
- Smoked Alaska Cod (Smoked) | Sitka Bay
- Crab Cakes Cod with Small Potato
- Alaska King Crab and Tuna Salad

ALASKA SHELLFISH

- Alaska Shellfish

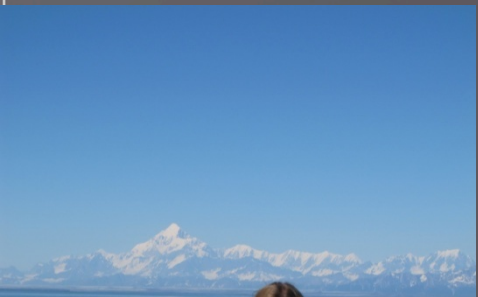
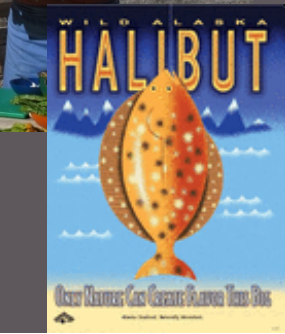


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Alaska Seafood Marketing Institute

ALASKA SEAFOOD: the big appeal of smaller portions



Alaska Seafood Brand Equity - Alaska Seafood held second place among food brands on U.S. menus in 2008

Thanks to Alaska's commitment to science-based management, fishing and seafood are part of our economic future.

The management of Alaska's seafood resources is a model for the world . . .



Alaska seafood ranks second among the three most popular food brands on U.S. menus.

**ASMI PLAYS A UNIQUE ROLE:
THROUGH ASMI, MANY INDIVIDUALS REPRESENTING THE MANY DIVERSE FACETS OF THE ALASKA SEAFOOD INDUSTRY – PROCESSORS AND HARVESTERS, AND OTHER DIFFERENT HARVEST SECTORS WORK TOGETHER FOR THE GOOD OF ALL.**