



Prioritized Audiences for Alaska Kelp

PEOPLE

Growing the market for Alaska kelp
2024



**Which eaters & B2B
stakeholders are likely to
purchase Alaska kelp?**

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This deck is part of a broader suite of resources that supports the [Alaska Kelp Food Roadmap](#).

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1B Executive Summary: B2B

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To grow the market for Alaska kelp among the Lower 48, FCL recommends a **phased** approach and scaling strategy that takes into account the current supply chain and production of kelp in Alaska:

• **PHASE 1 (1-2 yrs)**

ALASKA VISITORS

2.7 million

Have been to Alaska in the last 5 years



• **PHASE 2 (3-5 yrs)**

ESTABLISHED EATERS

7.8 million

Have consumed kelp in the last 3 months



• **PHASE 3 (5-10 yrs)**

GLOBAL CITIZENS

46.5 million

Seek international meals at least 2 times a week



HEALTH & NUTRITION ENTHUSIASTS

22 million

Health is their top priority when making food choices



YEAR 1

YEAR 10

Start with Lower 48 visitors to Alaska. Alaska travelers in 2023 rated local cuisine as their top activity. Build Alaska kelp brand equity, establishing it as a regional food to gain Lower 48 credibility.

Expand distribution to the Lower 48 through Established Kelp Eaters who value sustainable practices and perceive Alaska origins as more premium over Asian imports, supporting growth as production infrastructure expands.

Transition to exploratory segments. Health and flavor drive Established Kelp Eaters. Target potential customers who share these motivations but haven't adopted Alaska Kelp. These segments value Alaska's "pristineness" and "purity."

BEHAVIORAL INTENTION

Unlock initial interest through a sensory experience while visiting the state + **drive repeat consumption** well after their visit.

Increase **proportion of total consumption** that's from Alaska sources + **increase the number of eating occasions.**

Spark interest in trying a healthy and novel ingredient + drive **repeat purchases** when meeting their taste and health expectations.



B2B recommendations to expand Alaska kelp adoption among decision-makers in key channels. These channels are where prioritized consumers naturally seek it or expect to seek it:

Strengthen the “Alaska Origin” brand

While Alaska ingredients have a strong reputation, B2B stakeholders need a **clearer understanding of the financial and environmental benefits** of adopting kelp from Alaska. Key motivators for B2B adoption that can strengthen the Alaska Origin brand include the **unique flavor** of Alaska kelp, its perceived **superior quality, and health benefits** derived from the pristine Alaskan environment, its **sustainable sourcing**, and the opportunity to **support U.S. farmers**.

Address supply chain and certification challenges

Stakeholders **need to see a reliable, scalable supply chain** that can meet large volume demands and ensure consistent, year-round availability for wider adoption. **Support small farmers with the certification process** that enables broader access to supermarket channels, like Whole Foods Market, while ensuring that food safety standards and regulatory compliance are met.

Ensure availability and convenience

Provide easy-to-use product formats (e.g., dried and powdered, or ready-to-use Alaska kelp products like sauces) that reduce operational complexity for chefs and streamline sourcing for distributors and CPG companies.

Generate proof of consumer demand

Provide clear data (consumer surveys, point-of-sale data, running pilot programs, etc.) **on consumer demand and trends supporting Alaska kelp adoption**. This will help overcome the barrier of unclear demand, especially for distributors and CPG companies, who require concrete market evidence before investing in a product.

2 What Kelp Eaters Care about | Motivators & Barriers

Motivators and barriers that apply broadly across all four audience types were identified. While many data points come from Established Kelp Eaters through our quantitative analysis, these trends emerged as general patterns across all segments.

✓ Motivators

FLAVOR

60% of Established Kelp Eaters eat kelp because *“it’s tasty and a flavor enhancer.”*¹

HEALTH

49% of Established Kelp Eaters eat kelp to *“support their health.”*¹

SUSTAINABLE PRODUCTION AND SOURCING

39% of Established Kelp Eaters rate sustainability as the top attribute when buying a kelp product.¹

VERSATILITY

The narrative *“can be enjoyed in nearly any dish”* led to the greatest increase in eater interest for all segments.¹

CULTURAL, REGIONAL, AND TRADITIONAL FOODWAYS

Visitors are especially attracted to traditional cultural foods of Alaska Natives.²

EXPLORATION

Considered *“intriguing”* and exotic – high willingness to learn more about it.¹

⚠ Barriers

UNAWARENESS

80%+ of respondents from prioritized segments are not very familiar with kelp: *“This food is not top-of-mind for me.”*¹

UNCERTAINTY ABOUT HOW TO PREPARE IT

47% of Established Kelp Eaters and most chefs interviewed during our primary research feel that they need more education: *“not sure how to prepare it.”*¹

AFFORDABILITY

20% feel it is too expensive: *“premium items, generally reserved for occasional purchases.”*¹

ACCESSIBILITY

Low menu penetration (9% in the US menus in 2023) and lack of a central location in retail: *“Having fresh seaweed dishes at restaurants would help.”*³

3 Deep Dive into Our Eaters: Understanding How to Leverage Personas

In the following slides, we'll present detailed Personas representing the key consumer segments likely to purchase Alaska kelp.

How to Navigate These Slides?

What is a Persona? Personas are buyer profiles that provide an overview of different audience types and their characteristics. They humanize data, offering relatable profiles that represent key consumer groups. Each Persona covers:

Demographics: Insights into average income, geographic location, and age.

Motivators and Barriers: Factors that drive or hinder engagement of Alaska kelp.

Buyer Behaviors: Purchase patterns and preferences specific to each persona.

Perception of Alaska kelp: How each group views Alaska kelp.

How to use this information: Unpacking these personas allows producers and kelp stakeholders to craft more eater-centered messaging and strategies to increase more effective adoption, addressing the unique needs, motivators, barriers, and purchasing behaviors of each consumer group. .

4 Meet the 2.7 Million Alaska Visitors



Origin:¹ West (27%), South (36%), Midwest (17%), Northeast (21%)

Average Income:¹ \$117K+ / year

Average Age:¹ 48.4

Aiming to explore Alaska by land and sea, these travelers enjoy activities in nature, and seek out unique experiences, drawn to high quality amenities and excursions.

CORE NEEDS*

Purpose - EXPLORATION

Community - SHARING EXPERIENCES

✓ MOTIVATORS

PREMIUM & LOCAL - Gravitate towards “memorable” dining experiences that are exclusive to that specific place.²

EXPLORATION - High willingness to learn more about Alaska kelp; often described as “intriguing.”⁶

VERSATILITY - Narratives around versatile Alaska kelp applications showed the highest consumption intent among eaters.⁶

⚠ BARRIERS

UNAWARENESS - 70% of respondents are not very familiar with Alaska kelp.⁶

LOW CONSUMPTION INTENT - 100% would consume Alaska kelp dishes or products less than 1-2 times/year.⁶

AFFORDABILITY - High perceived cost of Alaska kelp products.²

UNCERTAINTY ON HOW TO USE IT - “What does it pair well with?” as one big concern.⁶



BUYING BEHAVIOR

NAUTICAL ADVENTURERS - Over 50% of travelers focus on cruise-only itineraries.⁵

DINING AS LARGEST SHARE OF WALLET - 80% of visitors say dining is their top activity.⁶ Average spend is \$300 per person per trip.³

LOW FREQUENCY OF CONSUMPTION - 70% consume Alaska kelp rarely or never.⁶

CPG TOP CHANNEL - Around 70% of eaters prefer to buy Alaska kelp in supermarkets vs other retail or foodservice locations.⁶



ALASKA KELP PERCEPTIONS

SUSTAINABLE - Strong perception of Alaska kelp as sustainable (average 5.9 out of 7).^{2,6}

HEALTHY - Alaska kelp products were perceived as “healthier alternatives” than similar products from the same retail category.²

HIGH QUALITY & SAFE - Perceived as being “fresher” than other kelp species.^{2,6}

¹Established Eaters Survey (N=296), 2024 | ²FCL DScout Mission - What's on Your Plate" (N=60), 2024 | ³Alaska Visitor Profile 2022-2023 | ⁴Juneau 2023 Tourism Survey | ⁵Juneau 2023 Cruise Passenger Survey | ⁶FCL Validation Survey (N=200), 2024.

! *If you want to know more about core human needs, see slide 6 here: [link](#)

5 Meet the 7.8 Million Established Kelp Eaters



Origin:¹ West (30%), South (24%), Midwest (15%), Northeast (17%)
Average Income:¹ <100K/year
Average Age:¹ 27-43 years

These eaters are gourmet adventurers in the Lower 48 who look for tasty, diverse, and healthy food, and have consumed kelp in the last 3 months.¹

CORE NEEDS*

Control - FLAVOR; HEALTHY LIFESTYLE; SAFETY

Purpose - FOOD EXPLORATION

✓ MOTIVATORS

FLAVOR - 60% eat kelp because “it’s tasty and enhances the flavor.”¹

HEALTH - 49% eat kelp to “support their health.”¹

SUSTAINABLE PRODUCTION AND SOURCING - 39% rate sustainability as the top attribute when buying a kelp product.³

VERSATILITY - The message “can be enjoyed in nearly any dish” led to the greatest increase in eater interest.⁵

⚠ BARRIERS

UNAWARENESS - 90% of respondents are not very familiar with Alaska kelp (not at all, moderately, or slightly).¹

UNCERTAINTY ABOUT HOW TO COOK/PREPARE IT - 47% feel that they need more education.¹

AFFORDABILITY - 20% feel it is too expensive.¹

🛒 BUYING BEHAVIOR

CPG WINS - 80% of eaters prefer to buy kelp in CPG.³

LOW FREQUENCY OF CONSUMPTION - 53% of eaters eat kelp less than every other month.¹

INFLUENCES ON FOOD CHOICES - Chefs, particularly celebrity and entertainment chefs, influence food choices.³

👁 ALASKA KELP PERCEPTIONS

HIGH PERCEIVED VALUE - Eaters are willing to pay \$7-10 on average for Alaska kelp products.³

ADVENTUROUS - “It helps me explore diverse cuisines” was a top driver.^{1,2}

PURITY & PRISTINE - There are strong associations between quality and Alaska origins.²

¹Established Eaters Survey (N=296), 2024 | ²FCL DScout Mission - What’s on Your Plate” (N=60), 2024 | ³FCL Validation Survey (N=246), 2024

! *If you want to know more about core human needs, see slide 6 here: [link](#)

6 Meet the 46.5 Million Global Citizens



Origin:^{2,5} Predominantly West Coast

Average Income:¹ \$75K-\$99K

Average Age:¹ 30% are ages 25-34; 19% are between 35-44³

Food adventurous consumers looking for regional and international flavors that allow them to live unique cultural experiences, prioritizing quality, convenience and flavor.^{1,2,3}

CORE NEEDS*

Control - FLAVOR; CONVENIENCE

Purpose - FOOD EXPLORATION

✔ MOTIVATORS

FLAVOR - "It's delicious" was the main driver when choosing an adventurous food.⁴

EXPLORATION - Interested in exploring familiar formats with novel, interesting, or unique flavors.^{3,4}

CONVENIENCE - Eaters look for novel easy-to-use products.⁴

⚠ BARRIERS

ACCESSIBILITY - 38.1% of respondents say they don't know where to get kelp.⁴

LACK OF FAMILIARITY - 23.8% of eaters say kelp is not a top-of-mind ingredient for them.⁴

PREPARATION - 14.3% say they're unsure how to cook or prepare kelp.⁴

QUESTIONABLE QUALITY - 9.5% say they're unsure about the quality of kelp.⁴



BUYING BEHAVIOR

INTERNATIONAL GROCERY STORES - As top places to look for adventurous foods.⁴

CONDIMENTS - As their "to-go" adventurous food to reproduce international flavors at home.⁴

SOCIAL MEDIA - Influencers as trusted voices, as well as family and friends.⁴



ALASKA KELP PERCEPTIONS

STRONG ASSOCIATION WITH ASIAN

DISHES - Comparisons to nori, algae, sushi, seafood salad, and finfish dishes.¹

DISTINCT FLAVOR - Eaters perceive Alaska kelp as "salty," "briny," and "flavorful."¹

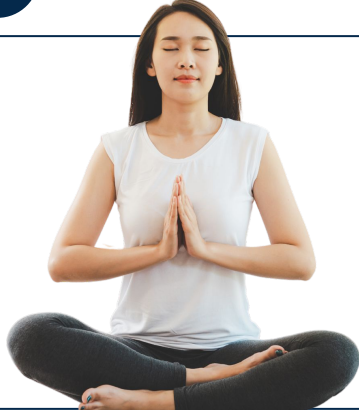
HEALTHY - "Nutrient-dense" and "superfood" were top descriptors.¹

INTRIGUING - "I've never tried it, but I'm intrigued." "[It] hasn't hit mainland U.S. yet."¹

¹FCL Validation Survey (N=246), 2024 | ²Specialty Food Association - State of the Consumer, 2024 | ³Mintel - Regional and International Flavors and Ingredients US, 2023 | ⁴Mintel - Multicultural America: Dining Out US, 2023 | ⁵FCL DScout Mission - What's on Your Plate" (N=60), 2024

! *If you want to know more about core human needs, see slide 6 here: [link](#)

7 Meet the 22 Million Health & Nutrition Enthusiasts



Origin:^{3,5} Metropolitan Areas (e.g., LA, NY)
Average Income:¹ \$75K+
Average Age:¹ Millennials & Gen Z

Health-conscious eaters who seek clean, whole foods⁸ that enhance wellness and support their active lifestyles. They favor eco-friendly, high-quality ingredients that align with their sustainability goals.^{1,4}

CORE NEEDS*

Control - HEALTHY LIFESTYLE; SAFETY

✓ MOTIVATORS

HEALTH - 77% of eaters seek functional foods that will help them live longer.⁹ 60% say that would eat kelp to manage their weight.⁹

VERSATILITY - Eaters seek customizable products that align with their unique dietary preferences.^{6,9}

⚠ BARRIERS

ACCESSIBILITY - Many eaters are unaware of versatile, healthy, and customizable menu options featuring Alaska kelp in restaurants and CPG.⁶

AFFORDABILITY - High perceived cost of Alaska kelp is a potential factor impacting their food choices.^{5,6}

🛒 BUYING BEHAVIOR

FUNCTIONAL BENEFITS - Eaters believe in food as medicine,⁵ looking for kelp products with holistic benefits (e.g., gut health, sleep, and/or immunity).^{2,3,8}

“REAL FOODS” INSTEAD OF SUPPLEMENTS - 60% say they would rather see added benefits from whole-foods than isolated nutrients.^{4,6,8,9}

STRONG PACKAGING INFLUENCE - 75% look for health benefits right on the packaging.⁹

👁 ALASKA KELP PERCEPTIONS

NUTRIENT-DENSE - Kelp has many minerals and vitamins that eaters “don’t usually get from land vegetables.”¹

FLAVOR ENHANCER - “Salty,” “savory,” and “umami” were top descriptors.¹

VERSATILE - Used as a garnish, seasoning, side dish, snack, or nutritional supplement.¹

EASY TO PREP - Eaters like that kelp can be “so simple” with “no preparation required.”¹

¹FCL Validation Survey (N=246), 2024 | ²Datassential - Healthy Trends 2024 Keynote Preview | ³Vilceanu et al., 2019 | ⁴Innova Marketing Insights, 2023 | ⁴NIQ - What’s Next in Wellness, 2024 | ⁵Mintel - Millennials and Health US, 2024 | ⁶Mintel - Fast Casual Restaurants US, 2023 | ⁷Datassential Menu Adoption Cycle, 2023 | ⁸SPINS 2024 Trend Predictions | ⁹Mintel - Better for You Eating Trends US, 2023

! *If you want to know more about core human needs, see slide 6 here: [link](#)

8 Estimating Market Potential: Reaching 50x growth in 10 Years

Based on primary data, **we estimate the Total Addressable Market (TAM)** needed to reach our goal of \$15 million in 10 years as follows:

We anticipate that each consumer would spend around \$21 per year. This estimate assumes that consumers would make around 3 purchases per year since the reported consumption per year is 1-2 times/every 6 months,¹ with a willingness to pay between \$7-10/product.¹ 30% of this spending would go to the producer, which translates to \$7 per year per consumer directly contributing to the market goal. **Based on this estimate, we can project the percentage of market share we need to capture in each identified segment to reach our goal.**

	Serviceable Obtainable Market (SOM) % Estimate	Serviceable Obtainable Market (SOM) Size based on estimate	Estimated \$ Share to Alaska kelp Industry (30% of selling price)
Alaska Visitors	10%	270,000	\$1,890,000
Established Kelp Eaters	10%	780,000	\$10,920,000
Global Citizens	1%	465,000	\$3,255,000
Health & Nutrition Enthusiasts	1%	220,000	\$1,540,000

¹FCL Validation Survey (N=699), 2024

9 Eater Segments For Future Exploration

FCL recommends revisiting the below segments in the future, as the Alaska kelp industry grows, so that the consumer base of sustainable, aquatic foods can evolve to reflect a diversity of incomes, regions, ethnicities, life stages, and eater contexts.

Casual Diners Foodservice

This is the second preferred channel for Established Kelp Eaters. Casual dining provides a platform to **introduce diners to unfamiliar ingredients** in a **less intimidating** and **more affordable setting** compared to fine dining.³ Though this audience is diffuse, we revisiting this segment as Alaska kelp becomes **more accessible and visible** on menus in foodservice.

Early Eaters (aged 3-10) CPG

Early and repeated exposure to new healthy foods, such as sea vegetables, will help **shape the preferences** of this **long haul** consumer base.^{1,2} However, we recommend exploring this segment in the future once the **nutritional content** of Alaska kelp is **better understood** and the industry is **ready to navigate** the **highly regulated** baby and toddler food industry.

Eco-Conscious Eaters CPG & Food Service

This small, but **rapidly growing** segment reflects current trends and **increasing consumer interest in sustainability**.^{4,6} Still, while consumers **express a desire** to make **environmentally friendly choices**, other factors such as **taste, cost, health, and convenience remain their top priorities**.⁵ As collective awareness and consumer empowerment toward climate action continue to grow, it would be worth revisiting this segment in the future.

¹Schiff et al., 2023 | ²Doumeizel, 2023 | ³Mintel Casual Dining US, 2023 | ⁴Numerator Winning the Eco-Driven Consumer, 2023 | ⁵Mintel - Sustainability Food & Drink, 2023 | ⁶NIQ, 2024.

10 What B2B Stakeholders Care about | Motivators & Barriers

Motivators and barriers broadly applicable to B2B stakeholders for the wider adoption of Alaska kelp, focusing on identified channels that resonate with both Alaska Visitors and Established Kelp Eaters

✓ Motivators

HERITAGE & CULTURAL DIVERSITY

Preserving traditional foodways, honoring cultural diversity, and supporting local communities are key priorities for identified stakeholders.

FLAVOR & QUALITY

The distinct flavor profile of Alaska kelp and its role as a flavor enhancer make it highly appealing for elevating dishes and enhancing product offerings.

ALASKA ORIGIN

Alaska's pristine, upscale reputation give its kelp a distinct competitive edge, reinforcing its premium perception and appeal to stakeholders who value high-quality, safe, and health-conscious products.

SUSTAINABILITY & TRANSPARENCY

Stakeholders prioritize locally and sustainably sourced products that align with environmental standards, supporting consumer demand for ethical practices and transparent production processes.

CONVENIENCE

Stakeholders look for easy-to-use formats that simplify operations.

⚠ Barriers

LOW AVAILABILITY & CONSISTENCY

Alaska kelp is perceived as difficult to source consistently, which creates concerns about meeting volume requirements and supply chain reliability.

UNCLEAR DEMAND

Buyers may hesitate to invest in Alaska kelp without clear evidence of consumer demand due to the niche nature of the ingredient.

FOOD SAFETY REGULATIONS

Strict food safety regulations and concerns about heavy metal contamination create hesitation, as stakeholders require assurance that the product meets safety standards and complies with food safety regulations.

HIGH COSTS & CERTIFICATION CHALLENGES

High costs associated with certification processes and the lack of clear quality standards create barriers for small producers, complicating their ability to enter larger markets.

11 Meet the Foodservice Buyer †



Health-oriented restaurant chains
Alaska tourist-focused restaurants

Foodservice buyers seek premium, high-quality, healthy ingredients that elevate culinary offerings. They highly value preserving traditional foodways and supporting local communities but also prioritize stable supply chains and operational simplicity to ensure consistent menu offerings.

CORE NEEDS*

Control - CONSISTENCY

Purpose - SUSTAINABILITY & ETHICAL SOURCING

Community - SUPPORT LOCAL PRODUCERS

✓ MOTIVATORS

HERITAGE & CULTURAL DIVERSITY - Preserve Native Alaska foodways (e.g., Alutiiq, Sugpiaq) to honor cultural diversity and tradition and support local communities.

UNIQUE FLAVOR - Alaska kelp's distinct flavors are especially appealing for making dishes stand out.

ALASKA ORIGIN - Alaska holds an upscale reputation related to premium quality.

CONVENIENT - Chefs look for ready-to-use or "one-step-away" formats to simplify kitchen operations.

HEALTH - Highlight Alaska kelp's nutritional benefits to meet demand for health-focused offerings.

*"Chefs understand that it's good for the environment, it's good for our health, but at the end of the day, **they want something that both tastes great and is an interesting, unique flavor that they can incorporate in a way that makes their dishes stand out.**" - CPG seasonings company owner*

⚠ BARRIERS

LOW AVAILABILITY - Inconsistent supply and complex sourcing processes make it challenging for chefs to access kelp in Alaska.

UNCLEAR DEMAND - Perceptions that Alaska kelp is niche. Chefs want to see clear financial benefits when investing in niche or emerging ingredients.

SUSTAINABILITY CONCERNS -

- **MARICULTURE** - Doubts about the environmental impact of large-scale mariculture.
- **LONG TRANSPORTATION DISTANCES** - Usually chefs prefer local ingredients to reduce carbon footprint and support local communities.

UNCERTAINTY ABOUT HOW TO USE IT - Lack of education around how Alaska kelp will fit in with current offerings

12 Meet the CPG Brand Owner



Premium seasoning brands.
Health-forward and sustainable snack companies.

CPG brand owners prioritize local, sustainable, and nutritious ingredients that enhance product quality and align with their financial and environmental goals. They prioritize a stable supply chain, large-volume availability, and cost-effectiveness, while remaining mindful of financial risks and regulatory hurdles.

CORE NEEDS*

Purpose - SUSTAINABILITY

Purpose - INNOVATION

Community - PRESERVE HERITAGE

✓ MOTIVATORS

LOCAL & SUSTAINABLE PRODUCTION -

Buyers prioritize locally and sustainably sourced products to meet consumer demand.

ALASKA HALO - Alaska's pristine environment enhances the premium reputation of its kelp. Buyers perceive it as having superior quality and health benefits.

FLAVOR & QUALITY - Buyers value premium-quality ingredients with unique flavors that justify a higher price point compared to their competitors.

HEALTH - Health-conscious CPG brands seek nutritious, functional ingredients that appeal to consumers and align with growing trends like clean label products and "food as medicine."

CONVENIENT - Easy-to-use formats, such as powdered kelp, are key to driving wider adoption.

⚠ BARRIERS

FINANCIAL RISK – Uncertainty about the financial benefits of investing in a niche, premium ingredient

AVAILABILITY – Buyers perceive Alaska kelp as difficult to source consistently.

UNSTABLE SUPPLY CHAIN & LACK OF ECONOMY OF SCALE – Concerns about the reliability of the supply chain and the ability to meet large volume demands

REGULATORY RESTRICTIONS & FOOD SAFETY RISKS – Uncertainty around legal barriers and food safety concerns related to incorporating Alaska kelp

LONG TRANSPORTATION DISTANCES – Concerns about the environmental impact of long transportation distances

AFFORDABILITY – The high perceived cost of Alaska kelp may influence buyers' decisions and limit adoption.

13 Meet the Large Supermarket Distributor



Natural grocery stores (e.g. Sprouts, Whole Foods Market) in the Pacific Northwest.

Large supermarket distributors prioritize sustainable ingredients with transparent production practices that meet quality standards, balancing affordability, premium quality, and a reliable supply chain. They aim to tailor part of their offerings to include local products, with Alaska ingredients particularly appealing in the Pacific Northwest.

CORE NEEDS*

Control - CONSISTENCY

Control - SAFETY (COMPLIANCE & REGULATORY)

Purpose - SUSTAINABILITY & ETHICAL SOURCING

✔ MOTIVATORS

SUSTAINABLE & TRANSPARENT PRODUCTION

– Distributors prioritize sustainably sourced products that align with environmental standards and consumer demand for ethical practices.

ALASKA HALO – Alaska’s pristine environment enhances its reputation for producing premium-quality aquatic foods.

LOCAL – Distributors like Whole Foods Market tailor part of their offerings to include local products, with Alaska ingredients holding special appeal in Pacific Northwest establishments.

STABLE SUPPLY CHAIN – Reliable producers who can meet volume requirements and delivery timelines are essential.

AFFORDABILITY – Distributors value ingredients that deliver premium quality at a competitive price, ensuring a balance between cost and value.

⚠ BARRIERS

LACK OF QUALITY STANDARDS FOR KELP

– The absence of clear standards for certifying kelp products creates uncertainty for buyers.

HIGH COST OF CERTIFICATION PROCESS FOR SMALL FARMERS

– Expensive certification processes make it challenging for small farmers to access large supermarket channels.

FOOD SAFETY CONCERNS – Buyers require assurance, such as testing for heavy metals, to meet strict safety requirements.

UNCLEAR DEMAND & RISKY

– Distributors are hesitant to adopt Alaska kelp products without clear evidence of consumer demand.

HIGH COMPETITION FROM FOOD FROM SIMILAR CATEGORIES

– Established seaweed products in similar categories create tough competition for shelf space.

14 APPROACH

How Food for Climate League (FCL) Arrived at the Eater Segments

SOURCES

25+ Industry Reports & Articles

(e.g., ASMI, Mintel, FMI)

5 Academic Articles

17 Datasets

Exploratory Segments Qualitative Study

(n=60)

Established Eaters Needfinding Survey

(n=296)

Established Eaters Validation Survey (n=246)

Alaska Visitors Validation Survey (n=200)*

Step 1

Identify Eaters via Secondary Research

FCL first identified potential eater segments through an analysis of secondary research, e.g., industry reports, articles, and datasets. Examined eaters' core needs, barriers, motivators, values, trusted voices, and overall market size.

FCL then prioritized consumer segments using a 2x2 matrix, triangulating data around estimated market size, income, and eaters' values and needs/

Step 2

Consumer Segmentation via Primary Research

FCL evaluated and addressed gaps in secondary literature on eater segments through quantitative needfinding research. Identified needs, channels, and core motivations to consume kelp, as well as barriers to adoption, narratives, and product preferences.

FCL then refined and further prioritized consumer segments based on drivers identified through quantitative validation research.

Lastly, FCL conducted qualitative research on prioritized eater segments and analyzed data to inform untapped product and narrative opportunities.

! *We chose not to conduct a needfinding survey for Alaska Visitors because we found reliable secondary research on their needs and buying behaviors. As the primary goal for the Established Kelp Eaters needfinding survey was to fill the gaps in secondary literature (academic papers, market research reports) with primary data (predominantly quantitative).

14 APPROACH

How FCL Arrived at the Eater Segments

SEGMENTATION MATRIX

Mapping Ideal Consumers on a 2X2 matrix.

Horizontal (X-axis):

Estimated market size Using existing research and educated assumptions about population size, we estimated how many people might be interested in Alaska kelp products.

Vertical (Y-axis):

Likelihood to consume This line shows how likely each group is to actually try Alaska kelp products. We looked at people's values and needs, and considered how much they might be able to spend based on income.

Based on size and likelihood to consume Alaska kelp products, we were then able to pinpoint which were the best groups to target.

LIKELIHOOD TO CONSUME (triangulation of consumer values, needs, and income)



14 APPROACH

How FCL Arrived at the Eater Segments

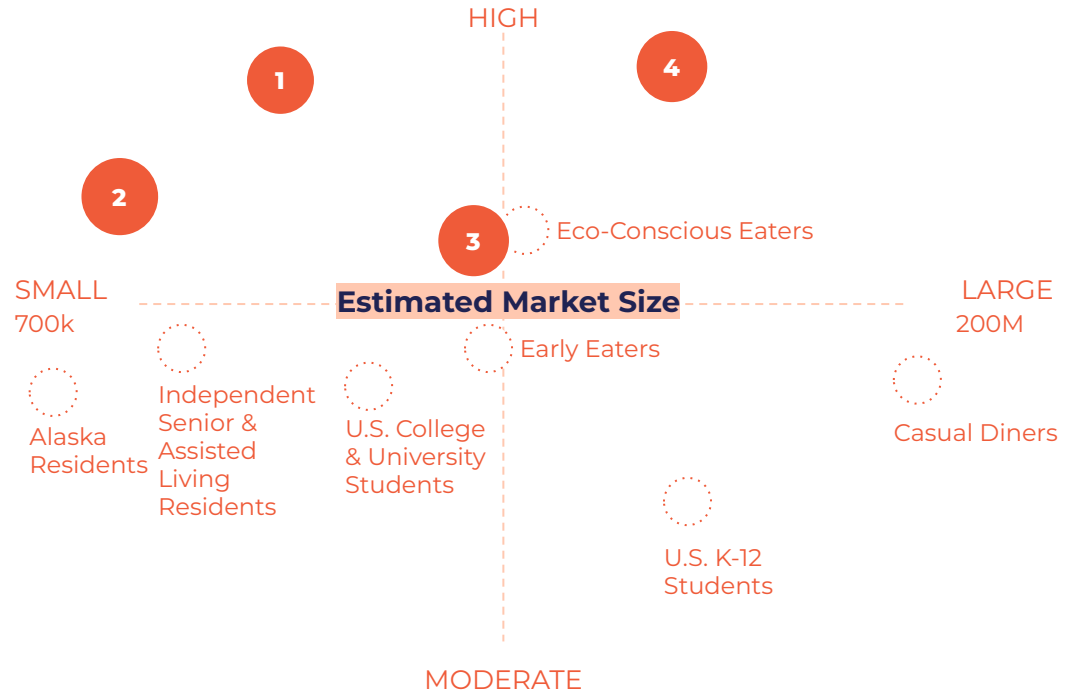
PRE-SELECTED SEGMENTS FOR TASK 2

Based on our research, these are the key consumer segments to pursue.

These groups have the potential to grow the market for Alaska kelp in retail and foodservice.

1. Established Kelp Eaters
2. Alaska Visitors
3. Health & Nutrition Enthusiasts
4. Global Citizens

LIKELIHOOD TO CONSUME (triangulation of consumer values, needs, and income)



14 APPROACH

How Food for Climate League (FCL) Analyzed the B2B Stakeholders

SOURCES

14 interviews with B2B stakeholders, (e.g., R&D chefs, including an Indigenous chef, CPG brands, large distributors, and food historians)

Step 1

Identifying key B2B stakeholders

FCL curated a strategic list of B2B stakeholders, guided by insights from prior primary and secondary research with eaters and industry experts. Stakeholders were evaluated across an ingredient adoption spectrum:

- Non-adopters (e.g., unaware or unfamiliar with Alaska kelp)
- Partial adopters (e.g., sourcing kelp but not from Alaska)
- Full adopters (e.g., those who have already integrated Alaska kelp into their menus or CPG products)

Step 2

Primary research with B2B stakeholders

FCL conducted qualitative research with B2B stakeholders in prioritized segments through personalized, semi-structured interviews. The goals of this research were to:

- a) Further unpack the needs, motivators, and barriers among B2B segments for wider adoption
- b) Validate and refine findings from eater-focused research on preferred product formats, narratives, and pricing

This research surfaced actionable opportunities and challenges while pressure-testing marketing strategies with stakeholders at different adoption levels.

THANK YOU!

Questions? Please contact us at:
info@foodforclimateleague.org

Visit the [Southeast Conference website](#) to access the Roadmap Resources Hub