



GAPP

Partnership

Program Report

Programs from 2019-2021

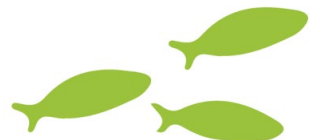




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I. Partnership Program Overview

The Association of Genuine Alaska Pollock Producers (GAPP) Partnership Program is a critical piece of the overall GAPP strategy. Over the past few years, GAPP has invested significantly through the Program into putting Wild Alaska Pollock into new product forms, into new channels and associating it with influencers to raise its profile with consumers in the U.S. and around the world.

Partners are required to reply to the formal “Request for Proposals” and submit a program idea that specifically outlines the ways in which the proposed program will put Wild Alaska Pollock into a new form or channel where it has previously not been seen, or associate it with a high-profile celebrity, chef, or other influencer to aid in raising its profile and cementing the attributes of Wild Alaska Pollock with consumers. Partners must also agree to utilize GAPP’s consumer-tested messaging to ensure that the attributes of the fish are being talked about in a consistent manner (to aid in brand recognition for Wild Alaska Pollock) and must agree to share the outcomes of the program and key learnings to inform the industry and future partners.

II. Executive Summary

The main goal of Partnership Program is to increase awareness of and build demand for Wild Alaska Pollock. Secondly, a key component of the Program is to collaborate and share learnings about the promotion of Wild Alaska Pollock so that the industry can cumulatively benefit from those learnings for future product innovations, product launches, marketing and promotions.

The good news is that we have gained significant learning from all our Partnership Programs. Specifically:

1. All marketing programs that drive trial and introduce Wild Alaska Pollock to consumers help to entice consumers and drive sales.
 - We have seen several examples of how product demos in big box stores have helped to significantly drive sales.
 - Targeted digital coupon programs that incentivize trial have been shown to introduce the specie to new consumer targets.
 - Programs like the Gorton’s “one bite” campaign encouraged non-fish-eating consumers trial Alaska Pollock through a challenge-style marketing campaign.
2. Placement in Retail makes a difference – getting out of frozen fish aisle can drive growth.
 - For new innovations like burgers and noodles, getting into a different aisle helped consumers explore new options for seafood consumption.
 - Pairing new product innovations is key: when trialing a new product, placing it next to the other components of a recipe helps consumers know what to expect with the product and how to use it.



- Placing fillet in the chilled section of grocery can help with improving imagery and driving growth via recipes and family consumption and places Wild Alaska Pollock head-to-head with other competitive whitefish.
3. Food service has several challenges but is still an important channel for Wild Alaska Pollock growth.
 - Consistency of preparation is key to delivering a great consumer experience.
 - Availability at distributors remains a challenge. We need to work with larger chains and restaurant groups to have the scale to gain placement with large seafood and foodservice distributors.
 - Individual white tablecloth restaurants should not be a primary focus at this time. In most cases, they will not create enough demand to get the pull-through needed to get distributors' focus.
 4. Influencers can be a great way to break through and introduce consumers to Wild Alaska Pollock and its attributes.
 - Ideally the best time to partner with a celeb/personality is when they are “on their way up” at a point when they are not as expensive and can become lifelong evangelists and ambassadors for the species.
 - Providing influencers with turn-key messaging, brand guidelines and consumer-data to help inform their recipe creation and social media posts helps them feel confident representing Wild Alaska Pollock and builds a long-term relationship.
 5. Communication and education on the specie is still key to growth.
 - Although the awareness of Wild Alaska Pollock has been on the rise, we still have work to do to breakthrough and gain awareness of all the incredible benefits of Wild Alaska Pollock especially as compared to key fish competitors.
 - Where possible, campaigns need to educate based on the approved and researched GAPP messaging to create a surround-sound effect for the “brand” of Wild Alaska Pollock.
 - Engaging consumers to help educate them about Surimi Seafood is especially important to combat any perceived negative impressions about the word “imitation” that could dissuade purchase.
 6. The ever-changing media landscape means a move towards digital media and social spend.
 - There was always a clear shift of focus to digital and social, but Covid has accelerated this shift.
 - The rise of Instagram and TikTok as food and recipe portals is a huge opportunity for Wild Alaska Pollock long term.
 - Digital and social media allows for more flexibility, better targeting and it is clearly where the consumer is spending more time, especially for meal and recipe ideas.
 - We have also seen the rise of connected TV and its implications on media buys. Covid expedited the transition to connected (integrated) TV.

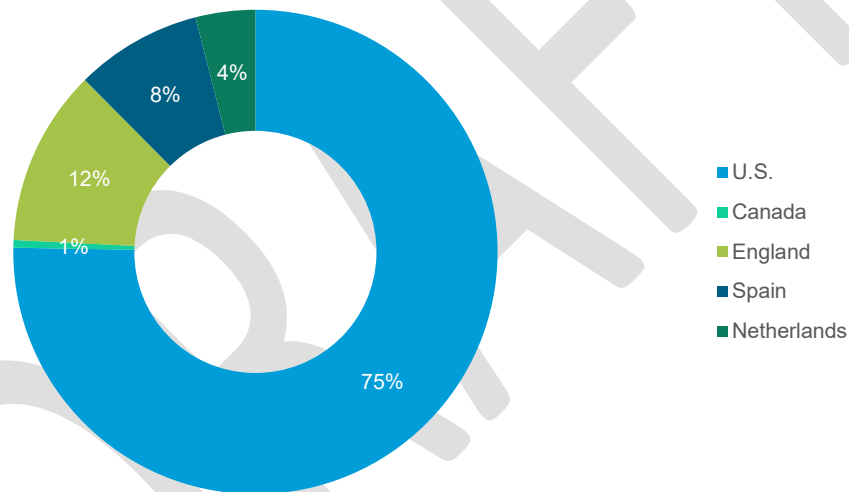


Between January 2019 and January 2022 GAPP has obligated over \$6.7MM in program funds with over \$3.5MM of those funds being spent to date. When partner dollar matches are included, which are required of partners on at least a one-to-one dollar basis, the economic impact of the GAPP Partnership Program is even more significant: more than 3 times the GAPP dollar commitment. That means the \$3.5MM GAPP has spent to date has translated into more than 14MM dollars in marketing campaigns specifically designed to increase awareness and build demand for Wild Alaska Pollock globally.

III. Program Comparisons

a. By Region

The Majority of Dollars have Historically Gone to U.S. Business

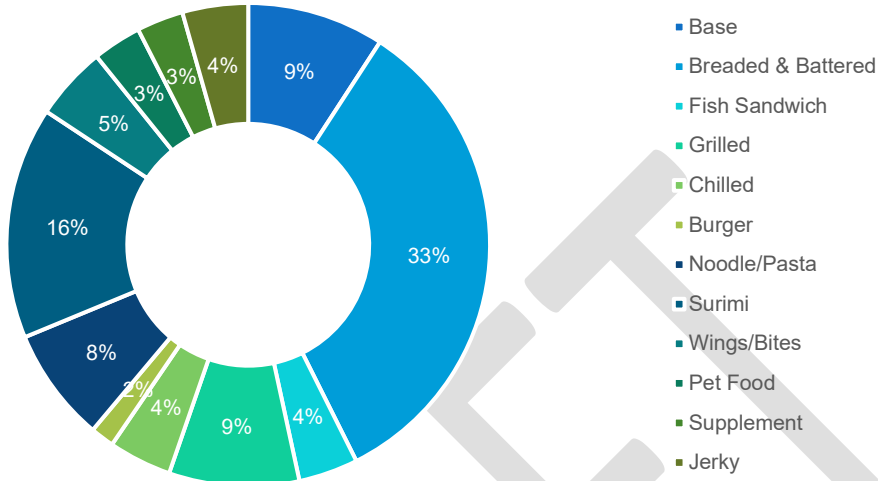


Total: \$5,276,910.63



b. By Product

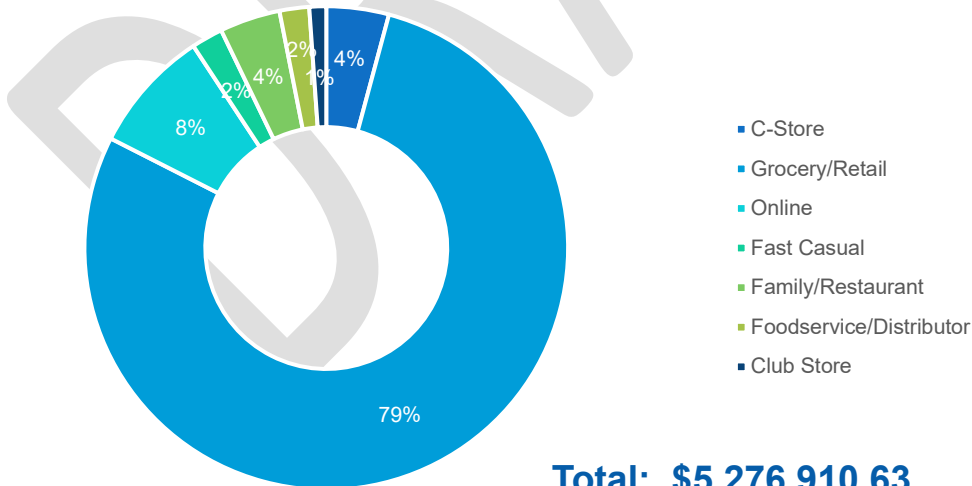
Largest Portion of Spend is Supporting Breaded & Battered combined with Fish Sandwiches



Total: \$5,276,910.63

c. By Channel

Majority of Dollars Support the Retail/Grocery Channel



Total: \$5,276,910.63



IV. Financial Overview/Summary of Spend

Between January 2019 and January 2022 GAPP has obligated over \$6.7MM in program funds with over \$3.5MM of those funds being spent to date. When partner dollar matches are included, which are required of partners on at least a one-to-one dollar basis, the economic impact of the GAPP Partnership Program is even more significant: more than 4 times the GAPP dollar commitment.

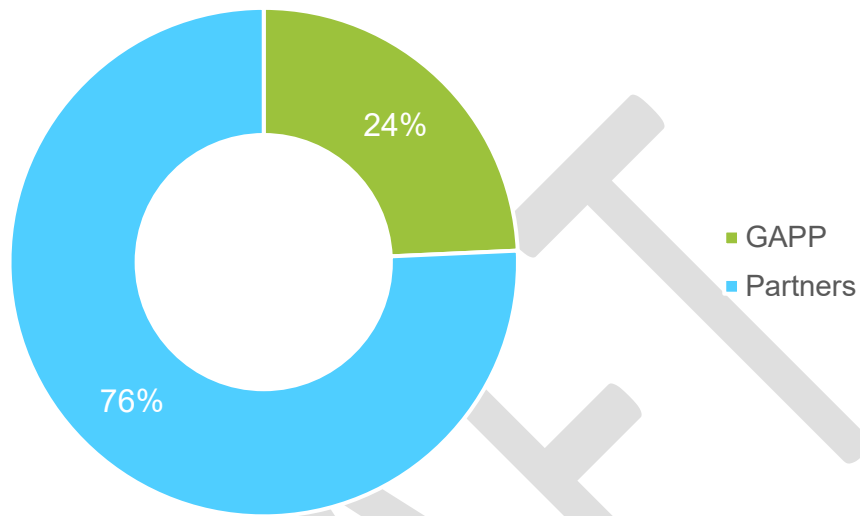
Although GAPP commits a significant amount of spend each funding round, sometimes Programs are cancelled after the funds are committed due to a variety of factors including changes in the product availability, changes in each business or unforeseen circumstances like the COVID-19 pandemic.

	GAPP Obligation	GAPP Spend	Cancelled/ Returned Funds	Outstanding Obligations
North America				
Round 1	\$331,145	\$188,232	\$142,912	\$0,00
Round 2	\$996,320	\$800,192	\$196,127	\$0,00
Round 3	\$1,493,800	\$846,002	\$647,797	\$0,00
Off Cycle	\$317,125	\$260,605	\$56,519	\$0,00
Round 4	\$736,500	\$491,039	\$190,460	\$55,000
Round 5	\$1,367,427	\$0,00	\$0,00	\$1,367,427
Total NA	\$5,242,317	\$2,586,073	\$1,233,816	\$1,422,427
Europe				
Round 1	\$1,016,935	\$814,990	\$201,944	\$0,00
Off Cycle	\$193,000	\$188,909	\$4,090	\$0,00
Round 2	\$273,725	\$0,00	\$0,00	\$273,725
Total Europe	\$1,483,660	\$1,003,900	\$206,034	\$273,725
Total	\$6,725,977	\$3,589,973	\$1,439,851	\$1,696,152



Summary of total GAPP spend vs. total partner spend

Historically, Partners have spent significantly more than GAPP – over 3 times as much as GAPP.



V. Media and Branding Overview

a. Great Creatives/Campaign Examples

The Partnership Program has generated not only loads of incredible creative, recipes and tips to get consumers to try and fall in love with Wild Alaska Pollock but it has also generated high-level media placements, social media trends and millions of impressions that raise awareness of Wild Alaska Pollock and its attributes. All this activity builds a brand and a halo around Wild Alaska Pollock that takes it from an anonymous, substitutable whitefish to an irreplaceable, desirable, craveable protein.

The Program itself has also evolved in its requirements of partners to utilize the messaging. After the first and second rounds of partnership funding, GAPP created a messaging toolkit of consumer-tested messages informed by GAPP's proprietary research. This toolkit contained messages that promoted the most meaningful attributes of Wild Alaska Pollock and were meant to create the "brand" of Wild Alaska Pollock by inspiring consistent communications. As a requirement of funding through the Partnership Program thereafter, GAPP required the partners to utilize this toolkit as a baseline when describing Wild Alaska Pollock.

Below are examples of how partners have utilized that messaging on packaging, on websites and how influencers have used that messaging to develop social media and media materials to promote Wild Alaska Pollock and its attributes.



• Packaging Initiatives



Gorton's



TransOcean



- **Creating Evangelists/Influencer**



Gorton's Antonio Porowski



DRAFT



Louis Kemp Crab Delights Nancy Fuller



• Website Examples



Fish Said Fred

• Foodservice/Menu Programs

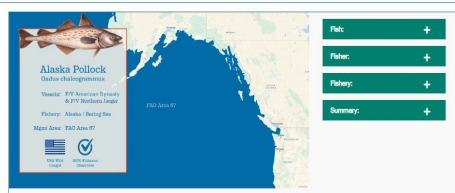


Lucky Louie Fish Shack



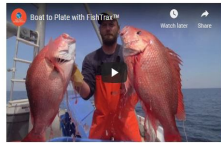
Nordstrom

- Sustainability Focus



FISHTRAX & TRACEABILITY

The Fish Trax™ system is a leading-edge electronic fishery information platform that revolutionizes the way fisheries information is collected, analyzed and shared. Engineered initially by biologists and scientists to track important resource data, Fish Trax™ has now expanded to serve as a tool for the seafood industry, allowing managers, scientists, regulators, and marketers to collect data and collaborate on ways to improve sustainable management practices.



You should know what you're eating, where it came from, and who caught it

Enter your Batch Date and find out:

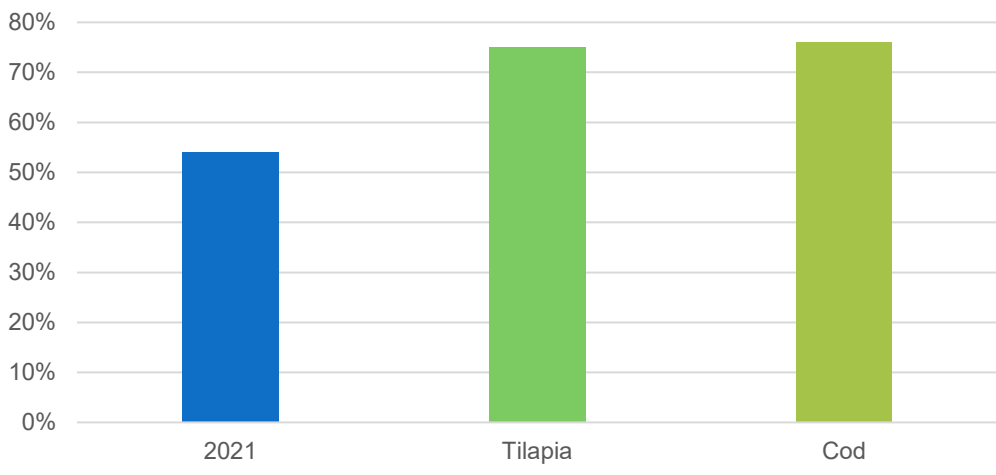
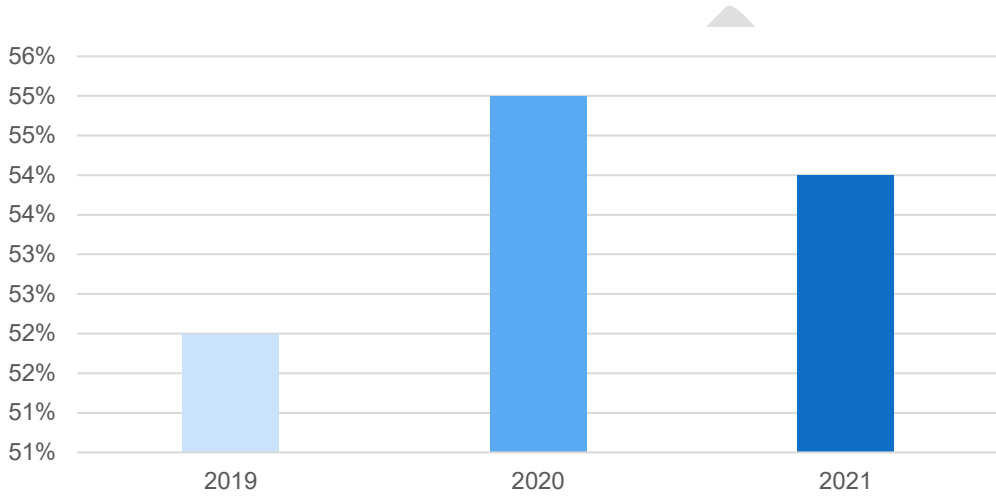
01/16/2022

Neptune Snacks



b. Total Prompted Awareness

Awareness of Wild Alaska Pollock rose between 2019 and 2020 and held steady between 2021 (a significant feat given the crowded consumer media landscape due to the pandemic). This rise in unprompted consumer recognition of Wild Alaska Pollock and its key attributes including wild caught, versatility, sustainability and nutrition is directly correlated to the rise in brands and partners utilizing consistent messaging which highlights those attributes and discusses them in materials, on packaging and on social and digital media in the way that's most motivational and remembered ("sticky") to consumers.





c. Social Media



fishsaidfred Have you tried our Awesome Alaska Pollock Fillets yet? 😋 One of the most sustainable fish going, pollock is a crowd-pleaser with it's mild taste – which is handy if you're cooking for a whole family 🙌🏻

Wild, boneless fillets that are naturally high in protein, low in fat and 1 of your 2 NHS recommended portions of fish per week 🐟

Why not try cooking Fred's Alaska pollock tacos with crispy slaw and avocado mayo? Delish and ready in under an hour, find the full details via the link in our bio 📌



tridentseafoods Have you met Cod's delicious Cousin? 🐟👨🏻‍🍳

As a climate-smart protein, and one of the most abundant wild-caught fish in the world, expect to see delicious, nutritious Wild Alaska Pollock on your plate and beyond in products for generations to come. 🌍

Stop by Nordstrom Restaurants and Specialty Coffee Bars to give it a try!

#AKPollockFutureFish #WildAlaskaPollock
#TeamWildAlaskaPollock #ClimateFriendlyPollock
#tridentseafoods #EatDrinkNordstrom

WILD ALASKA POLLOCK IS THE MOST ABUNDANT
 CERTIFIED-SUSTAINABLE
 WILD FISH IN THE WORLD

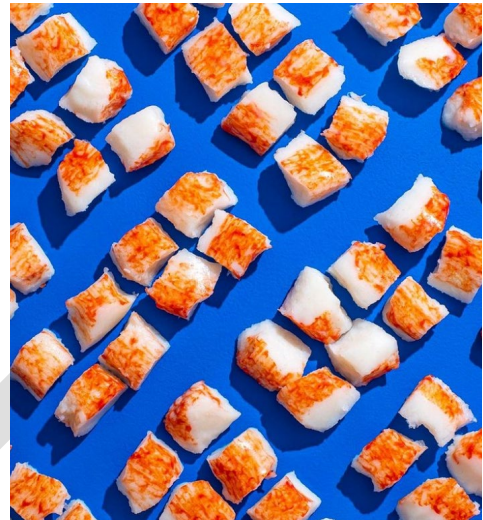
Food and Agriculture Organization of the United Nations' 2016 The State of World Fisheries and Aquaculture report



highlinercanada Life gets hectic. That doesn't mean there isn't time to sit down and enjoy a delicious snack. Our Wild Alaska Pollock Fish Wings are ready in 20 minutes and are sustainably sourced. Also, they're available in two delicious flavours @franksredhot and Southern Style!



crabclassic Have you met Crab Classic Chunk Style? It's fat-free, gluten-free and made with @wildakpollock. Not to mention, a source of Omega-3 and low in cholesterol. That's what we call the total package!



gortonsseafood We love a recipe that's all about making meal time a little easier, delicious, and better for you. Thanks to @Antoni Porowski's Literal Fish Sticks recipe, we've got you covered. 🐟 Pair Gorton's Fish Sticks (made with fresh wild Alaska pollock) with marinated veggies like peppers, cherry tomatoes and red onions on skewers and top with homemade herbed lemon tahini sauce for a simple sheet pan meal. Visit our stories or the link in our bio for @Antoni's Literal Fish Sticks recipe! 📱 #TrustGortons



neptunesnacks You know what has a LOT of protein? Fish jerky. 🐟

You know what's full of vital omega-3s? Fish jerky. 🐟

You know what supports responsible US fishers and helps restore humankind's health relationship with the sea? Your purchase of Neptune FISH JERKY! 🌊

SEA-RIOUSLY HEALTHY SNACKS

25g Protein	Omega-3s Pollock: 450mg Rockfish: 560mg	<90 Calories per serving
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**U.S. CAUGHT
MADE IN USA
100% TRACEABILITY**



d. GAPP in the News



GAPP announces new pollock partnerships



This Beloved Alaskan Fish has the Lowest Carbon Footprint of Any Major Protein in the World

By Andy Corbley - Jul 20, 2021

The Cordova Times

PRINCE WILLIAM SOUND'S OLDEST NEWSPAPER. ESTABLISHED 1914. TRIBALLY OWNED.

GAPP seek proposals for next round of Partnership Program funds

undercurrentnews

GAPP teeing up next round of Alaska pollock project funding

FISHERMEN'S NEWS

The Advocate for the Commercial Fisherman

GAPP's European Partners Plan New Pollock Products



VI. Key Program Learnings

a. Round 1 Program Summaries

There were five programs approved for Round 1 totaling approximately \$221,145, but in the end only two were executed for a total of approximately \$188,233. This was the inaugural round of funding for the Partnership Program and after this round, GAPP implemented a more formal “Request for Proposal” (RFP) process for future funding rounds that solicited greater detail from prospective partners such that programs could be better evaluated by the Board to determine if they met the stated Program objectives.

1. Trident – Protein Noodle Introduction

- a. Description: Regional launch of high protein, low carb, ready-to-eat Wild Alaska Pollock Noodles. The objective was to introduce the item to Costco members in limited regions and gain support across the company for the product. The program was supported by product demonstrations in limited Costco stores. Markets included San Diego, Texas and Los Angeles.
- b. Results/Learning: One of the challenges was in-store placement. Each warehouse has discretion to merchandise the product as they like; warehouses that put the item with the seafood products experienced lower sales as compared to warehouses that merchandised the item in the fresh pasta/noodles section had significantly higher sales. Being such an innovative item, overcoming the unknown of a noodle made of seafood was difficult. Once Covid hit and Costco discontinued in-store product demonstrations, getting consumer trial proved difficult. If the product was demonstrated and trialed in-store, it did well. Once consumers tried it and understood what the product is, then they accepted that it was made with seafood.
- c. Where it is now: This project has been paused due to Covid implications. The willingness to get new and different items into distribution took a back-seat to 466getting the core items in stock and on retail store shelves.
- b. Budget summary: GAPP Dollars: 75,000. Total Dollars: \$150,000.



2. Trident – Wild Alaska Pollock Awareness Campaign

- a. Description: To increase consumer awareness of Wild Alaska Pollock through press and influencer engagement. An additional goal was to gain placement for Wild Alaska Pollock on fine dining menus within top culinary markets in the U.S. Trident successfully partnered with a leading domestic Public Relations agency to engage targeted media outlets and place stories about Wild Alaska Pollock and its attributes. Such outlets included Vogue online, the Daily Mail, the New York Times, Real Simple Magazine and Yahoo Finance. Impressions from such media placements totaled 91MM.
- b. Results/Learning: Despite the media campaign, high-end restaurants were still reluctant to place Wild Alaska Pollock on their menus for two primary reasons: 1) Many fine dining chefs are unwilling to cook with frozen (as opposed to fresh)





- fish and 2) Wild Alaska Pollock isn't widely available with the seafood distributors servicing the high-end restaurants.
- c. Where it is now: While driving awareness for Wild Alaska Pollock is still a priority, this campaign has transitioned to other initiatives and the focus on restaurants has been with securing placement with broadline foodservice distributors.
- d. Budget summary: GAPP Dollars: \$113,233. Total Dollars: \$226,466.

b. Round 2 Program Summaries

Nine Programs were approved for funding in Round 2 totaling \$996,320. One program was subsequently canceled so ultimately GAPP funded eight programs totaling \$800,193. After this funding round, GAPP introduced consistent Memorandums of Understanding (MOUs) and messaging guidelines based off of GAPP's Year-over-Year Awareness and Familiarity study to ensure that partners were highlighting Wild Alaska Pollock by name and that they were referencing its attributes in a consistent way to build brand awareness for the fish.

1. True North – Martha Stewart

- a) Description: Launch support for a new product, Martha Stewart for True North Seafood – Wild Alaska Pollock with Southwest Spice Blend sku. The product is accompanied by a Martha Stewart signature spice blend, with suggested recipes chosen from the MarthaStewart.com archives.
- b) What was the program details? The Wild Alaska Pollock with Southwest Spice Blend sku was launched in store in October and delisted by the retailer approximately 4 months later. During its time in store, the product was promoted by way of in store POS, circular, TPD, sell sheets, sampling, a print ad, and digital advertising.
- c) Marketing and advertising initiatives specific to the GAPP partnership program included a print ad in Martha Stewart Living magazine on the West Coast, in store sampling at Vons / Pavilions stores, and digital advertising.
 - i. Results/Learning: The product did not get listed beyond the initial Vons / Pavilions store listings. The shelf price of \$9.99 at Vons / Pavilions was a barrier for consumers and even the promotional price of \$6.99 did not drive much of an increase in velocity on the product.
 - ii. Where is it now: The product was discontinued after being on shelf for approximately 4 months at Vons & Pavilions stores in Southern California.
 - iii. Budget Summary: GAPP Spend: \$26,838. Total Spend: \$53,676.





2. Gorton's – Anthony Porowski Influencer Program

- a. Description: Gorton's partnered with celebrity chef Antoni Porowski made famous on the Netflix show "Queer Eye for the Straight Guy" for a public relations program that included the creation of 3 recipes, social media activations, and media interviews for a goal of an estimated 40MM impressions over the course of the campaign.
- b. Results/Learning: The partnership with Antoni was successful for multiple reasons. Gorton's over-delivered with the creation of four unique recipes for their Wild Alaska Pollock products. Throughout the program Antoni made social media posts on his personal Instagram account and Gorton's supported all of his posts with paid media to increase reach and impressions. Traditional media impressions exceeded the stated goal by 18MM. The partnership allowed Gorton's to reach a newer, younger audience with their products and innovative ideas for how to prepare their signature items. Gorton's also benefited from the quality and ease preparation effect that influencer Antoni routinely provides to his followers.
- c. Where is it now: The time working with Antoni began at a turning point in his celebrity career. Antoni's fame has risen significantly since then and so has the cost of partnering with him. As such, Gorton's and GAPP are not currently partnering with Antoni.
- d. Budget summary: GAPP Dollars: \$200,000. Total Dollars: \$504,500.



3. High Liner – Alaska Wild Wings

- a. Description: This was the launch of a new frozen entrée and appetizer made from Wild Alaska Pollock: Alaska Wild Wings. This product takes Wild Alaska Pollock into a new segment: un-breaded appetizers. All items are seasoned but without breading. The program was introduced as a limited-time-offering into key retailers. Promotional elements of the campaign included: digital coupons, featuring of product in special sections, in-store merchandising and more. American Seafoods and Highliner Foods co-funded this product launch.
- b. Results/Learning: The program was an overall success and did increase consumption of Wild Alaska Pollock by introducing a new eating occasion for Wild Alaska Pollock consumption to consumers.
- c. Where it is now: The products are still on the market today.
- d. Budget summary: GAPP Dollars: \$150,000. Total Dollars: \$300,000.



4. High Liner – Foodservice 'Upper Crust'

- a. Description: This partnership launched a line extension for High Liner with three new skus: Everything Bagel, Honey Mustard and Pretzel crusted Wild Alaska Pollock which targeted MURC's, independent operators and contract management restaurant companies.





- b. Results/Learning: The initial launch was successful with sales meeting forecast demand. Unfortunately, since the launch was so close to the start of the pandemic, these skus did not have enough traction to sustain after COVID. Additionally, Higher sodium levels were a slight concern for health guidelines for specific consumers. Additionally, the initial product launch occurred right before the holidays which is believed to have caused slower initial sell-in.
- c. Where it is now: As of today, all 3 skus have been discontinued.
- d. Budget summary: GAPP Dollars \$50,000. Total Dollars: \$100,000.

5. High Liner – Premium Kroger National Launch

- a. Description: Dollars were spent against driving awareness and trial of 2 new Skin-Pack Pollock products that were launched in Kroger stores in 2019.
- b. Results/Learning: These 2 products were not successful. Velocities under-performed and they are no longer listed. The hypothesis is that Wild Alaska Pollock was not a good species to launch in a premium Skin Pack offering & the price point was an issue for consumers. Consumers did not want to pay the same price for what is perceived as a cheaper fish as compared to salmon, for example. Additionally, Kroger was selling their store brand at a significantly lower price.
- c. Where it is now: These skus have since been discontinued.
- d. Budget summary: GAPP Dollars \$150,000. Total Dollars: \$300,000.



6. American Seafoods – Retail Expansion Perfect Pollock Portions

- a. Description: Launch of Perfect Pollock Portions in Walmart stores in a test market in Florida. This was the first-ever chilled Wild Alaska Pollock product in retail distribution in the U.S.
- b. Results/Learning: More than 187 stores participated in the regional test. The biggest challenge was lack of consumer awareness of Wild Alaska Pollock.
- c. Where are they now? This was a one-time test and has not been repeated.
- d. Budget summary: GAPP Spend: \$118,355 Total Spend: \$236,710



7. American Seafoods – Culinary Top Chef Distributor Program


- a. Description: Chef contest with the Culinary Institute of America. Chefs competed to create Wild Alaska Pollock recipes.
- b. Results/Learning: In the end, several mouthwatering recipes were created. This content was used on our website and for social.
- c. Where are they now? We have not repeated the program
- d. Budget summary: GAPP Spend: \$35,000. Total Spend: \$70,000





- c. Where are they now: This was a one-time program with the CIA, yet recipes are still being used today.
- d. Budget summary: GAPP Dollars: \$35,000 Total Dollars: \$70,000.

8. Trident – Protein Noodles Round 2 – Increase Markets

- a. Description: This partnership was a regional launch of high protein, low carb, ready-to-eat Wild Alaska Pollock Noodle. The objective was to introduce the item to Costco member in limited regions and gain support across the company. The program was supported by demos in Costco. Markets included San Diego, Texas, LA and Bay Area. 
- b. Results/Learning: One of the challenges is placement in store. Each warehouse has discretion to merchandise the product as they like; warehouses that put the item with the seafood products experienced lower sales; warehouses that merchandised the item in fresh pasta/noodles had significantly higher sales. Being such an innovative item, overcoming the unknown of a noodle made of seafood was difficult. Once Covid hit and we were unable to do demos, getting consumer trial was difficult. If the product was demoed, it did well. Once consumers tried it and understood what the product is, then they were good with the fact that it was seafood.
- c. Where it is now: This project has been paused due to Covid implications. The willingness to get new and different items into distribution took a back seat to getting the core items in stock and on shelf.
- d. Budget summary: GAPP Dollars: \$70,000 Total Dollars: \$152,272

c. Round 3 Program Summaries (includes off-cycle funded Programs)

Fifteen programs were approved for funding in Round 3 totaling \$1,810,925. Four programs were subsequently cancelled, which led to GAPP ultimately spending \$1,106,608. With this round, GAPP initiated Committee review of the Programs depending on what form was being used (fillet, surimi, etc.) or if it was a marketing campaign or brand launch. The Committees used a newly designed scorecard to evaluate the programs before submitting recommendations for the Board on which programs should be funded.

1. American Seafoods/Midwestern Pet Food – New Year Digital Ad Campaign

- a. Description: Venture Limited Ingredient Diet for Dogs awareness and trial campaign ran from July – November 2020. The campaign included a Wild Alaska Pollock Meal and Pumpkin sku. The new product was promoted to pet owners through tactics including Google advertisements, Facebook advertisements, and Pinterest advertisements.





- b. Results/Learning: The campaign generated 5.6M impressions & 57K clicked through from the advertisement to the website. An estimated \$3K+ sales were generated during the campaign. The overall campaign was impacted by COVID and specifically the free product coupon did not generate much interest due to less in-store traffic during the pandemic. In the end, the promotional budget was significantly reduced.
- c. Where is it now: Although this program and promotion was for a defined time period, we do still promote Venture products which contain Alaska Pollock Meal. For example, coupons on distributed through our e-blasts to encourage repeat purchase.
- d. Budget summary: GAPP Dollars: \$7,317. Total Dollars: \$14,634.

2. Gorton's – One Bite Challenge

- a. Description: Launch of One Bite Wild Alaska Pollock creative campaign that included TV advertising and social media advertising with the goal being to expose consumers who had never tried Gorton's Wild Alaska Pollock products and convince them to try "just one bite."
- b. Results/Learning: Overall it was a challenging time due to Covid and the campaign was ultimately paused. Total impressions at the time of the pause of the media campaign were 112MM, exceeding the target. Household Penetration numbers went up by 0.7pts when we were running the campaign.
- c. Where is it now: Since this time, the team has created and launched a new creative campaign that GAPP is also supporting.
- d. Budget summary: GAPP Dollars \$263,651. Total Dollars: \$2,779,000.



3. High Liner – Power Packed Pollock Burger North American Launch

- a. Description: This Wild Alaska Pollock burger was launched in the U.S. & Canada for the 2020 grilling season. The Wild Alaska Pollock was pan-seared with a crust of superfoods such as chia, flax, nori & quinoa. Promotional activities included video, coupons, and retailer advertisements. Bold disruptive packaging was designed to be distinctive. Promotional videos focused on product benefits of being "power packed."
- b. Results/Learning: Velocities were weak in year 1. The team tried to launch again in Year 2 but did not get significant acceptance. The hypothesis for low acceptance was the health focus on top of a fish burger created a product that was too niche for consumers and thus didn't have high enough demand.
- c. Where it is now: This item has been discontinued.
- d. Budget summary: GAPP Dollars: \$24,441. Total Dollars: \$48,882.





4. Schwan's – Wild Alaska Pollock Marketing Campaign

- a. Description: GAPP and Schwan's launched a new Signature Parmesan Alaska Pollock in March 2020. The program supported this new product as well as existing items with extensive promotion through August 2020.
- b. Results/Learning: The launch was successful. Consumers do value "done for you" type seafood concepts. Revenue grew +136% and buyers grew 157%. Seafood and Wild Alaska Pollock ladder up well to what consumers are looking for in everyday meals for their families: lean protein options that are quick and easy to prepare that their whole family will enjoy. Seafood is not top of mind as a "go to" meal. As an industry we need to continue to drive the awareness of Wild Alaska Pollock and invest in product innovations that are convenient and easy for consumers to prepare.
- c. Where it is now: Seafood & Wild Alaska Pollock continue to ladder up well to what our consumers are looking for in everyday meals for their families: lean protein options that are quick and easy to prepare and that their whole family will enjoy the taste of. This especially holds true as consumers increase their focus on nutrition in the wake of the pandemic. Wild Alaska Pollock remains an important part of Schwan's Home Delivery overall seafood assortment and Schwan's plans to continue to carry Wild Alaska Pollock offerings in its seafood portfolio.
- d. Budget summary: GAPP Dollars: \$95,000. Total Dollars: \$459,327.



5. Seven-11 – Fish Sandwich

- a. Description: GAPP and 7-11 launched a Wild Alaska Pollock Fish Sandwich for Lent. This was a Limited Time Offering from 2/5/20 through 4/13/20. The everyday price was \$2.49 with a \$2 promotion for Fish Fridays. In addition, the sandwich was included in the 7-11 Mix and Match 2/\$4 sandwich offer.
- b. Results/Learning: Convenience-Store customers were very accepting of the concept of a fish sandwich and the key claims of Wild Alaska Pollock. In addition, they were highly complementary of the quality of the product along with an aggressive price point \$2.99. The best days of sales were Fish Friday's. The program ran into challenges at the end due to the timing of COVID.
- c. Where it is now: No specific plans to repeat the program.
- d. Budget summary: GAPP Dollars: \$150,000. Total Dollars: \$300,000.



6. Trans Ocean – Digital Advertising and Rebate Program

- a. Description: Launch a Digital and Advertising Rebate offer with the goal of educating the target audience on Crab Classics and its high quality – made with sustainable, Wild Alaska Pollock. The tactics used were Ibotta and Food Network Display Ads as






well as social media. The program leveraged Earth month creative to reach targeted consumers with a focus on sustainability.

- b. Results/Learning: The Earth Month event connected the Crab Classic brand to the important issue of sustainability and introduced the brand to new consumers including a younger target - 28% of consumers who redeemed were under the age of 34. In addition, the campaign exceeded impression and redemption targets.
- c. Where it is now: Team has taken support to the next level, with three projects currently running: All Recipes, Influencer & Digital Catalina.
- d. Budget summary: GAPP Dollars: \$75,000. Total Dollars: \$150,000.

7. Trident Seafoods – Costco Burger Demo Campaign

- a. Description: Increase distribution and trial at Costco of Wild Alaska Pollock in this consumer friendly and versatile product form: burgers. 
- b. Results/Learning: Due to the COVID situation, as widely publicized Costco eliminated in store demonstrations during this time period. Regional placement in Western Canada and San Diego were predicated on the fact that the product would be supported with demonstrations. In lieu of product demonstrations, Costco required the funds to be allocated into end caps & IRCs to help promote and sell through their commitments. This led to challenges as many consumers do not know about Wild Alaska Pollock and were reluctant to trial the product without trying it in-store first. Trident had to put stickers on the product to let consumers know it was fish.
- c. Where it is now: This was an in & out program that has not been repeated.
- d. Budget summary: GAPP Dollars: \$59,400. Total Dollars: \$118,800.

8. Trident – Superfish Awareness

- a. Description: The goal of this partnership was to increase awareness of Wild Alaska Pollock by partnering with a popular influencer: Dan Churchill. The program utilized Dan Churchill to put a face on the “Super Fish Movement,” which focused on positioning Wild Alaska Pollock as a “superfood” due to its nutrition and sustainability. Promotional tactics included media placement (Open Table, Travel & Leisure, Martha Stewart & Good Morning America), Social Media Posts and Video Content. 
- b. Results/Learning: We have found that consumers (including the editors, influencers, and tastemakers) are more conscious than ever before. This is reflected in their appreciation of sustainable proteins and their willingness to learn more. Consumers are paying close attention to the nutritional facts and supply chain information – and are therefore seeking out this information across all platforms of media. It is an ideal time for us to (collectively) be executing these campaigns.



- c. Where it is now: Th program was closed by Trident and shifted to be administrated and managed by GAPP effective July 1,2020.
 - d. Budget summary: GAPP Dollars: \$59,556. Total Dollars: \$119,112.
- * GAPP spend was a total of \$171,194

9. Neptune Fish Jerky – Launch Campaign

- a. Description: Launch an innovative and healthy line of fish jerky featuring Wild Alaska Pollock products. The program was originally approved for retail activation, demos and other marketing activities. The team pivoted due to COVID challenges and deployed funds toward digital promotion, direct consumer/retail sampling mailings, PR and sign-on deals for new accounts bringing in Wild Alaska Pollock jerky.
- b. Results/Learning: We had a successful launch and consumer acceptance of the first Wild Alaska Pollock jerky on the market was high. We launched in six ecommerce sales outlets, Amazon and retail locations. Digital support generated 5.5M impressions (355% of goal) and we had online sales across all 50 states. Retail promotions drove velocities that created a wining sell story for future buyers. PR and promotional sales packs resulted in earned media placements, interviews on radio, podcasts and YouTube channels as well as posts by influencers and chefs.
- c. Where it is now: In the second year of GAPP partnership, the product line has continued to grow in distribution at a rate of 220% quarterly through both online promotion and rapid expansion into new channels, such as C-Stores. Wild Alaska Pollock Jerky has gained recognition across food industries and was a finalist for a NEXTY award at Natural Products Expo West, finalist for 'Best New Product' at Seafood Expo North America and won 'Best Whitefish Product' in the Alaska Symphony of Seafood.
- d. Budget summary: GAPP Dollars: \$119,430 Total Dollars: \$238,860



10. Denny's – Menu Item Launch Campaign

- a. Description: This was a comprehensive launch of new Wild Alaska Pollock Fried Fish Platter & Family Pack. The items were launched on 9/9/20 and expanded to 80% of restaurants on 11/4/20. Activation included emails, menu placement, posters, social and placemats.
- b. Results/Learning: Due to Covid, there was a slower ramp up than anticipated – significantly impacted by restaurant traffic. The franchisees were creative with their on-line ordering systems and pick up meals. That said the businesses suffered greatly. To assist operations, they had to adjust the plans and launched a more streamlined menu & adjusted promotional plans to accommodate fewer guests in the restaurant. In general, the franchisees and the customers loved the Fish & Chips products and they performed well. In late





2021 with the singular focus of shrinking menus further, it was removed from the menu.

- c. Where it is now: Historically, Denny’s and their franchisees have been big supporters of Fish & Chips on the menu. We will see if it comes back for next year as restaurants are starting to recover
- d. Budget summary: GAPP Dollars: \$52,026 Total Dollars: \$104,052

11. Gorton’s – Loop Me Campaign

- a. Description: Targeted social campaign that featured two creatives: One “recipe builder” where consumers engaged with the spot to build a salad, the other spot was a carousel of different Wild Alaska Pollock recipes and benefits.
- b. Results/Learning: This program exceeded impression goals despite the need to pause due to COVID. In addition, an ROI study through Keen demonstrated a positive ROAS spend (\$1.68 for every dollar spent). The carousel spot had higher engagement levels overall. Moving forward, Gorton’s would steer creative direction towards that ad format.
- c. Where is it now: Since this campaign ran, Gorton’s has optimized creative and launched the “It’s Time for Seafood” campaign continuing to extend learnings from this program and others to optimize media spend and creative.
- d. Budget summary: GAPP \$89,150 Total Dollars: \$213,000



d. Round 4 Program Summaries

Eight programs were approved in Round 4 totaling \$736,500. Seven of the programs have closed, so we have funded \$491,040. One program, Pescanova has not launched yet, but the full \$55,000 is expected to be spent in the Fall of 2022. In this round, GAPP took our objective and metrics to the next level with the launch of formal measurement & reporting documents which were required to be completed by the partners prior to receiving their final payment and collected program learnings in a standard way such that GAPP could report back to its members and the industry on each program and its return on investment.

1. Gorton’s – Move Over Meat Campaign

- a. Description: Gorton’s goal was to maintain new 2020 Households and Drive Repeat Purchase with new buyers of the category. In addition, Gorton’s wanted to develop winning creative highlighting the benefits of Wild Alaska Pollock over other land based traditional proteins.
- b. Results/Learning: Objectives were met or exceeded across the board – Household Penetration remained flat vs. YAG and the Buying Rate was right on target. In addition, the ‘Move over Meat’ then dubbed the “It’s Seafood Time” campaign was tested with Kantar and outperformed goals. While successful, based on the simultaneous significant shift for consumers to streaming TV, Gorton’s team would change the media mix moving forward and put more \$\$s into connected TV, knowing the ads can be more targeted.





- c. Where is it now: The “It’s Seafood Time” campaign was very successful, and Gorton’s is now in Year 2 of the campaign to support the base business.
- d. Budget summary: GAPP Dollars: \$217,000 Total Dollars: \$2,311,208

2. High Liner – Alaska Wild To Go QSR/C-store

- a. Description: Introduce Wild Alaska Pollock to new channels with innovative snacking products supported by merchandising materials and digital advertising
- b. Results/Learning: Program was simplified to a learning agenda & creation of assets. Comprehensive learning plan to map out the C-store landscape and opportunity for Wild Alaska Pollock. Seafood is changing the snacking landscape and Alaska origin is significant point of difference.
- c. Where it is now: New communication & POS is launching soon
- d. Budget summary: GAPP Dollars: \$26,875 Total Dollars: \$53,750



3. High Liner – Fish Wings and Awareness & Velocity Drive

- a. Description: Overall goal was to drive awareness of Wild Alaska Pollock Fish Wing through digital and influencer program. Timing of marketing program was shifted from Sept-Oct 2019 to Q1 2020 for Superbowl – a more expensive time for media.
- b. Results/Learning: Timing shift led to mixed results because Advertising was more expensive during Super Bowl. Video & Engagement levels exceeded target. Missed Impressions Target because of shift in timing of program drove higher media rates.
- c. Where it is now:
- d. Summary budget: GAPP Dollars: \$75,000 Total Dollars: \$150,000



4. Trident Louis Kemp – Nancy Fuller SuperBowl Campaign

- a. Description: Goal was to capitalize on increased surimi consumption and awareness post Covid-19 by utilizing Food Network Star, Nancy Fuller, to create and promote crave-able Superbowl recipe classics.
- b. Results/Learning: Key targets were met on all objectives. Overall, it was a good decision to leverage a personality like Nancy Fuller. She has tremendous engagement with her core following. In addition, she is very relevant with a broad target. Moving forward, transition away from large scale display ads due to low CTR as ad blockers have become bigger issue.
- c. Where it is now: Trident has continued its relationship with Nancy and her recipes are available on louis Kemp.com.
- d. Summary budget: GAPP Dollars: \$142,935 Total Dollars: \$285,870





5. Restaurant Depot – Wild Alaska Pollock Product Awareness

- a. Description: Drive awareness and sales of new Wild Alaska Pollock products through high reach Print and Digital Channels. This was a joint program with GAPP, ASMI and Restaurant Depot.
- b. Results/Learning: The main goal of increasing awareness was achieved. In addition, there was a significant increase in distribution (WC increased by 5 products & EC increased by 4 products). This translated to over 90,000 units sold. One key challenge was aligning on creative with GAPP & ASMI since there are differences in what’s allowed from a Brand perspective – moving forward we would recommend doing different programs.
- c. Where is it now: Due to covid, inventory and supply chain issues, sales have struggled a bit, but the team is aggressively working to regain momentum and get volume back to pre-pandemic levels
- d. Summary budget: GAPP Spend: \$19,500 Total Spend: \$78,000



6. Seven-11 – New Fish Bites

- a. Description: This partnership launched a new Limited Time Offering Fish Bites with special Friday promotion for Lent. Everyday price was 5 bites for \$3.69. The promotional price was 5 bites for \$3.00.
- b. Results/Learning: The fish bites concept did not resonate with customers, and the promotion did not get the same level of engagement with Franchisees like the sandwich did. In addition, execution was not 100%. Operators were concerned about fish being displayed in open cases, resulting in some significant availability challenges.
- c. Where it is now: 7-11 currently does not have any seafood products in its product assortment. However, if the team decides to pursue fish again, the recommendation is to focus on the fish sandwich.
- d. Summary budget: GAPP Dollars: \$9,730. Total Spend: \$19,459.



e. Round 1 European Program Summaries (including off cycle)

The Partnerships in North American were previously separated from the Partnerships funded in Europe. The first funding round in Europe saw eight programs approved totaling \$1,209,935. The program with Nomad ultimately did not launch because of challenges with confidentiality. Seven of the programs have now been completed, totaling \$103,900. European partners were required to use the messaging—by country—that was created by GAPP and its consumer research on Wild Alaska Pollock in Europe.



1. Angulas Aguinaga – La Gula Del Norte

- a. Description: Partnership launched 4 new product SKUs of “heat and eat” products containing surimi seafood made with Wild Alaska Pollock. Program also included consumer research, advertising, and marketing promotion around new products.
- b. Results/Learning: Overall the launch was a success. The ready to eat recipes outperformed the market. The gluten free product (launched in Oct. 2021) is turning 40% more than the top competitor. There were two areas that could be improved: 1) From a concept point of view, the gluten-free version came with the additional benefit of “reduced in salt.” There could be more focus or incrementality by separating both benefits into two different proposals and 2) “Hero” the launch – have a specific launch plan for the gluten free version which could have driven a bigger focus from the company and retailers speeding up distribution build.
- c. Where it is now: All products remain in the market with opportunities to grow distribution and rotation.
- d. Budget summary: GAPP Dollars: \$203,280. Total Spend: \$1,254,750.



2. Angulas Aguinaga – Krissia Italia

- a. Description: Crabstick base business reinforcement and launch of two new SKUs for retailer brands.
- b. Results/Learning: The launch exceeded expectations on both products for the first 4 months, but the category and therefore the brand are declining in Spain. Crabstick is a decreasing category in Spain, because of bad reputation and product proposition commoditization (lower quality at lower price). Consumer and retailer education on surimi seafood, the products, its origin, and benefits is critical so that European consumers do not see surimi as “cheap” or “fake.” There is a great need to increase relevance through health and convenience benefits.
- c. Where it is now: The products are still on the market, with full distribution.
- d. Budget summary: GAPP Dollars: \$242,605. Total Spend: \$485,820.



3. Pickenpack – Potato Topper Wild Alaska Pollock

- a. Description: Partnership launched 3 new SKUs of potato-crustured Wild Alaska Pollock. Program included photo shoot, packaging, in-store promotion and demonstrations.
- b. Results/Learning: Launched 3 skus successfully at Aldi and 1 sku with Migros in Switzerland. Overall project was slowed by COVID. Overall volume and in both retailers the program objectives were not met. Negotiations with retailers are ongoing. One big challenge when working with Private Label is





that you can recommend packaging (Wild Alaska Pollock on pack with the GAPP logo), but ultimately it is their choice.

- c. Where it is now: The product is still listed with Migros in Switzerland. The full range will be promoted by Lidl as of week 18 across Germany. We are currently in negotiations with both ALDI North and South for promotions End of 2002 as ALDI has currently stopped the sales of this item.
- d. Budget summary: GAPP Spend: \$53,353 Total Spend: \$106,706

4. Pickenpack - Fish and Sauce Wild Alaska Pollock

- a. Description: This partnership was a new product launch of 2 SKUs of Wild Alaska Pollock with included sauce. Program also included photo shoot, packaging, in-store promotion, and demonstrations.
- b. Results/Learning: Successful launch of all skus with Norma in Germany. Overall launch was slowed by COVID. Overall volume objectives were not met. Key learning is that the unique benefits of Wild Alaska Pollock could be highlighted in a more powerful way. In the world of COVID, new placements are tougher and tougher and thus it is critical to demonstrate to consumers why they need to add Wild Alaska Pollock to their diets.
- c. Where it is now: Both Penny and Norma have stopped the sales of this product range. Pickenpack is currently revising this product category with new strategy and investments for the future.
- d. Budget summary: GAPP Dollars: \$44,990. Total Spend: \$89,980.



5. Young's – Chipshop Quarter Pounder

- a) Description: Chipshop is a popular existing brand in the UK. This program was launched to support a new product "the Quarter Pounder". The spend went to in-store retailer promotion, social media marketing and influencer activity.
- b) Results/Learning: Unfortunately, there were product quality concerns. We did receive some consumer complaints.
- c) Where it is now: We have transitioned to an alternative/more expensive fish species.
- d) Budget: GAPP Spend: \$270,762 Total Spend: \$541,524





6. New England Seafood – Waitrose Program

- a. Description: This program supported the launch of New England Seafood’s Wild Alaska Pollock sku in 200 Waitrose stores. The program was a combination of Marketing and In-store Promotion.
- b. Results/Learning: Overall the program was a significant success. Source of volume data demonstrated that 34% of shoppers were new to Wild Alaska Pollock and 33% increased their consumption vs. the previous 12 weeks. NE Seafood gained shoppers from shellfish and other white fish species. Wild Alaska Pollock also over indexed with shoppers with kids, demonstrating the opportunity within chilled fish.
- c. Where it is now: Due to the success of the launch, New England Seafood transitioned the sku into their consumer facing brand Fish Said Fred, with a key focus on attracting more family shoppers. The team was approved for another program supporting the brand’s Awesome Alaska Pollock Fillets at Waitrose and Ocado. Marketing dollars successfully supported the brand across early 2022 through in-store promotion and a social/influencer program which reached 1.6m shoppers and generated purchase intent scores about FMCG category benchmarks. Unfortunately, however, due to supply issues, the sku is being de-listed in Waitrose in June
- d. Budget summary: GAPP Spend: \$34,145 Total Spend: \$68,290



7. Young’s – Gastro Bakes Launch in UK

- a) Description: The goal was to bring new familiarity to the popular Gastro Bakes line and increase awareness of Wild Alaska Pollock. The spend supported TV ads, digital and social as well as in-store marketing.
- b) Results/Learning: Unfortunately, there were product quality concerns. We did receive some consumer complaints.
- c) Where it is now: We have transitioned to an alternative/more expensive fish species.
- d) Budget: GAPP Spend: \$154, 765 Total Spend: \$309,530





VII. Program Highlights and the Future

The GAPP Partnerships program has been a great tool to increase awareness and demand for Wild Alaska Pollock. We will continue to drive for growth and take all elements of the program to the next level. Of note is the following:

Shift Spend Towards Growth Areas

- Historically the majority of our spend has gone to support our base business: U.S., Breaded & Battered in Retail. As we move forward, we will shift the balance of dollars supporting the base business vs. growth areas.
- We will give added support to programs that support Expansion Markets (based on 2040 learning).
- We will support innovative products that expand beyond Breaded & Battered
- Additionally, we will increase support to programs that get the fish out of the Frozen Fish Aisle in Retail as well as expand in Food Service

Communication and Messaging Guidelines

- We will add an addendum to the Memorandum of Understanding to include more details on expectations on nomenclature, messaging, traditional, digital and social media content development as well as photo and logo recommendations

Breakthrough Innovation

- We appreciate that true innovation takes time. We will target particular companies' research and development teams to educate them on the benefits of Wild Alaska Pollock and the funds available through the Partnership Program.