



Gluten Intolerance Group

EXPO WEST 2025



Meet Your Presenter



Jessie Wright

VP, Product Intelligence
SPINS

For the past 25 years, **SPINS** has been powering and defining the natural products industry.



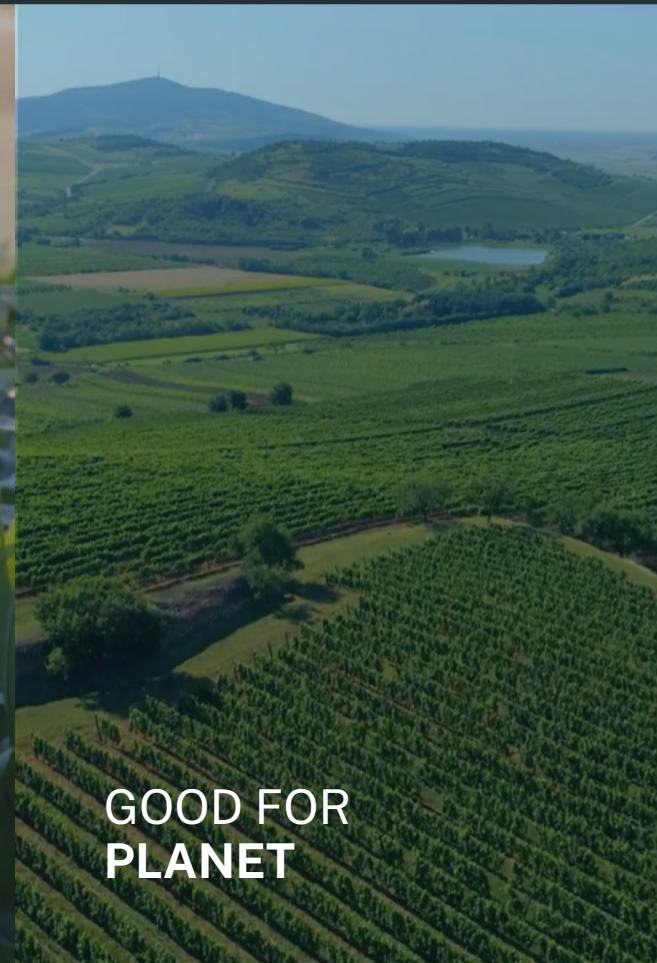
GOOD FOR
HEALTH



GOOD FOR
ANIMALS



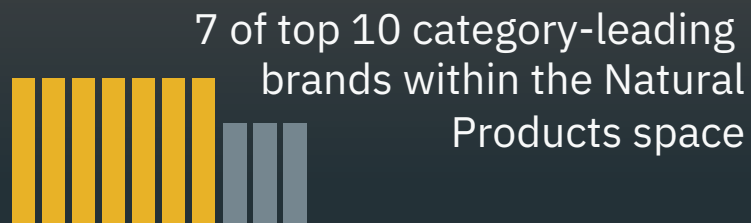
GOOD FOR
PEOPLE



GOOD FOR
PLANET

SPINS WORKS WITH

1500+ Brands



70%

50% of all U.S.-based brands that have been acquired or funded over the last 24 months*

Brands that work with SPINS grow 22% faster on average than those that don't

22%

**per Whipstitch top 60 deals*

SPINS HAS

76+

Exclusive Retail Partnerships

REPRESENTING

>\$200B

In Sales

SPINS clients launched over 100,000+ items in the last 3 years



380+
Ecosystem Partners

(excluding brands & retailers)

We empower the community to interact and transact with efficiency, transparency, and trust.



Every SPINS offering is enhanced with **SPINS Product Intelligence**

SPINS Product Intelligence spans an extensive database of over 3 million UPCs and hundreds of attributes, enabling vital sightlines and transparency into the marketplace

COLLECT



GENERATE

Product Facts

e.g. Category, Size, Brand, Company, Packaging, Form, Brand Positioning, Product Type

Allergens & Sensitivities

e.g. Major 8 Allergen Free, Labeled Gluten Free, Labeled Grain Free, Tree Nuts, Lactose, Shellfish, Soy, Peanuts, Dairy

Sustainability

e.g. Non-GMO Project Verified, Labeled Grass Fed, Organic, Fair Trade, Certified B-Corp, Certified Demeter Biodynamic, Labeled Animal Welfare

Health & Wellness

e.g. Labeled Sprouted, Probiotics, Functional Ingredient, Sugar Ingredients, Monk Fruit, Certified Whole Grains Council

Lifestyle, Diets & Tribes

e.g. Paleo, Vegan, Certified Paleo Keto, Raw, Plant Based

Clean Label

e.g. Yellow No. 5, Nitrates, Artificial Sweeteners, High Fructose Corn Syrup, MSG, Paraben Free, Aluminum Free



Top Line **Certified Gluten Free** Item Sales

\$ % Change L52 Weeks

NATURAL EXPANDED GROCERY

+10.1% Total Channel Sales

+9.9% Total Units

+0.2% ARP

REGIONAL & INDEPENDENT GROCERY

+6.4% Total Channel Sales

+2.5% Total Units

+3.8% ARP

CONVENTIONAL MULTIOUTLET (MULO)

+11.8% Total Channel Sales

+10% Total Units

+1.6% ARP



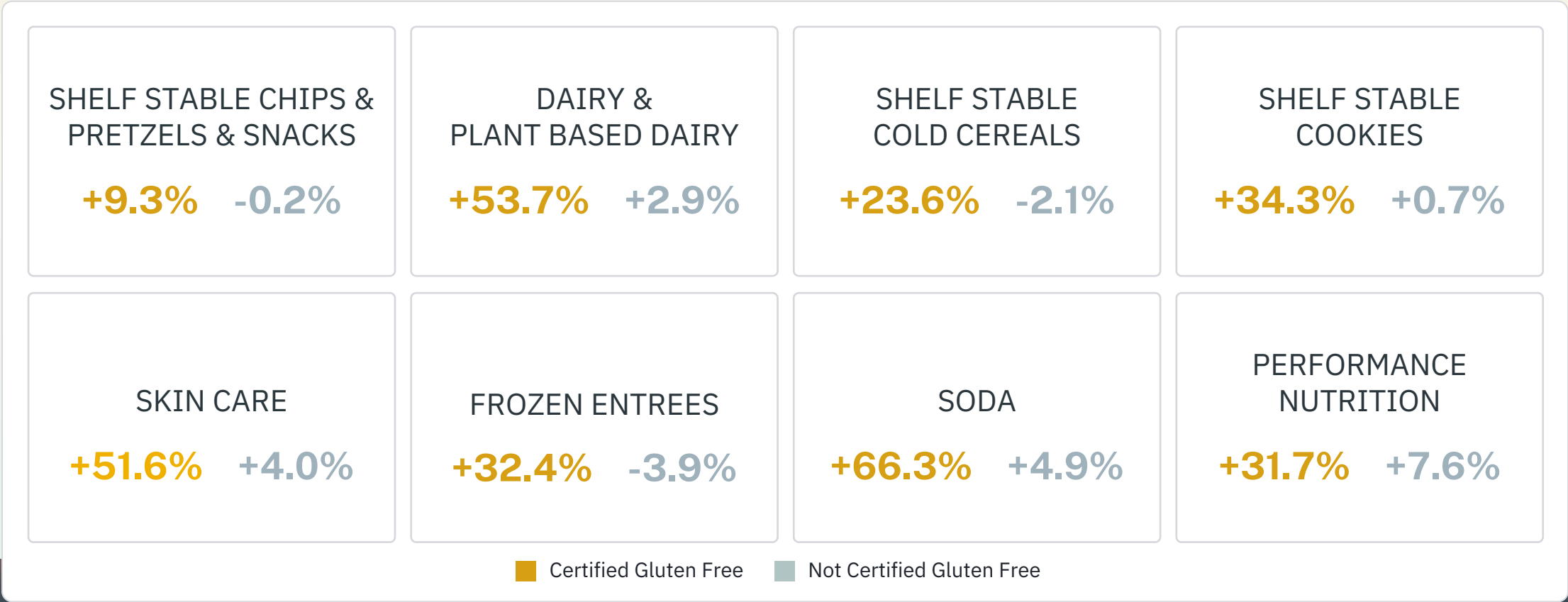
Emerging Attributes in Certified Gluten Free

FOOD & BEVERAGE

ATTRIBUTE	12 Weeks	52 Weeks
LABELED ORGANIC	+6.8%	+9.5%
CERTIFIED NON-GMO PROJECT VERIFIED	+10.5%	+11.3%
NO ADDED HORMONES	+20.7%	+17.3%
CERTIFIED B-CORPORATION	+5.5%	+3.8%
LABELED VEGAN	+17.0%	+19.5%
PLANT-BASED POSITIONED	+2.1%	+1.3%
CONTAINS SUPER MUSHROOMS	+31.5%	+37.6%
CONTAINS SUPERFOODS	+14.6%	+14.0%
LABELED ALLERGEN FRIENDLY	+4.3%	+8.7%



Top Certified Gluten Free Categories





Gluten Free and Non-GMO in VMS



Certified Gluten Free



Certified Non-GMO



Certified Gluten Free
& Non-GMO



Dollar Sales

\$634M



YOY Growth

+27.2%



Dollar Sales

\$1.2B



YOY Growth

+8.3%



Dollar Sales

\$434M



YOY Growth

+31.4%



Gluten Free and Organic in Food & Beverage



Certified Gluten Free



Dollar Sales

\$10B



YOY Growth

+11.6%



Certified Organic



Dollar Sales

\$22.7B



YOY Growth

+6.7%



Certified Gluten Free
& Organic



Dollar Sales

\$1.7B



YOY Growth

+8.6%



Gluten Free and Regenerative Organic Alliance in Food & Beverage



Certified Gluten Free



Dollar Sales
\$10B



YOY Growth
+11.6%



Regenerative Organic Certified™

Certified Regenerative Organic (ROC)



Dollar Sales
\$181.6M



YOY Growth
+19.2%



Regenerative Organic Certified™

Certified Gluten Free & ROC



Dollar Sales
\$5M



YOY Growth
+29.5%



Gluten Free and Non-GMO in Food & Beverage



Certified Gluten Free



Dollar Sales
\$10B



YOY Growth
+11.6%



Certified Non-GMO



Dollar Sales
\$43B



YOY Growth
+4.4%



Certified Gluten Free &
Non-GMO



Dollar Sales
\$5.8B



YOY Growth
+10.1%

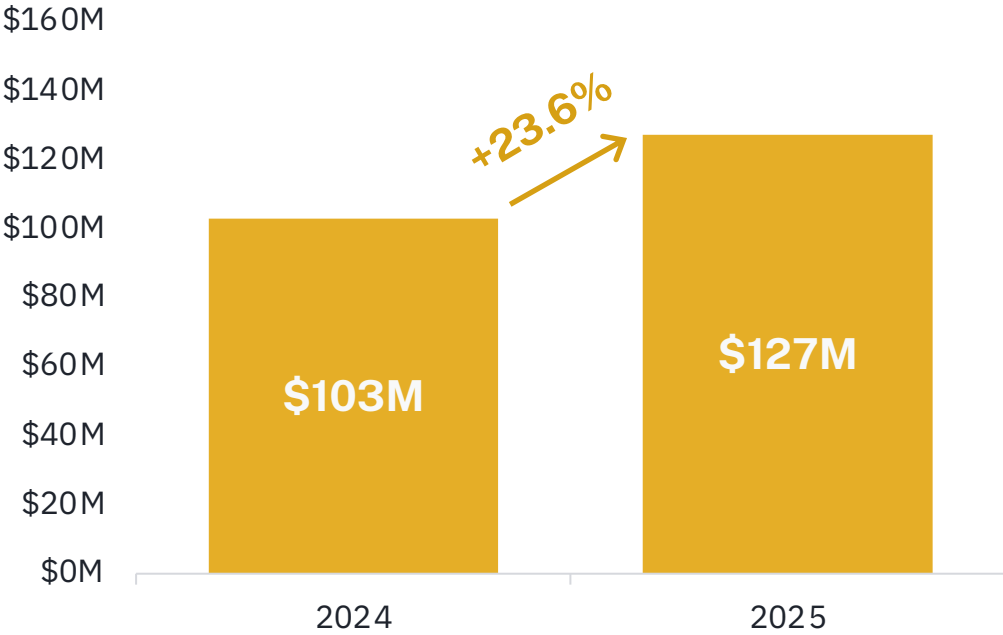


YOY CATEGORY GROWTH



Shelf Stable Cold Cereals have seen a **23.6% increase in sales**

YoY Dollar Sales of Gluten Free SS Cold Cereals



Vitamin D



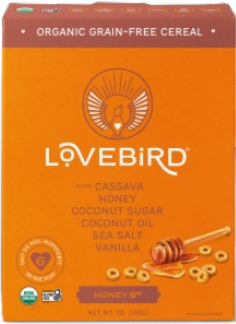
Upcycled



Nostalgic Flavors



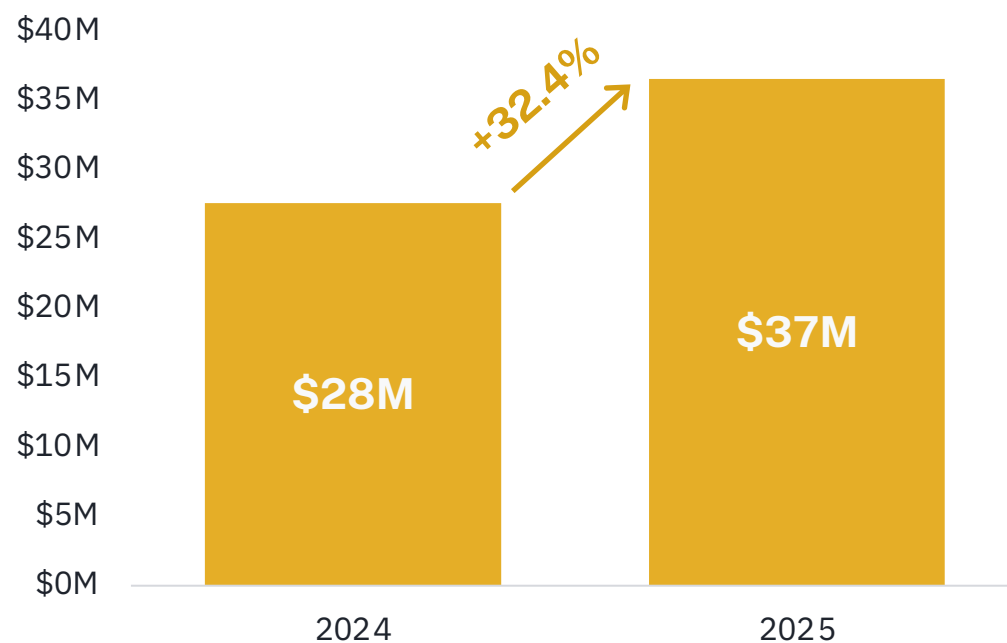
Superfoods





Frozen Entrees that are Certified GF have seen a **32.4%** increase in sales

Dollar Sales of Gluten Free Frozen Entrees



Cross-Category Partnerships



Healthy Indulgences



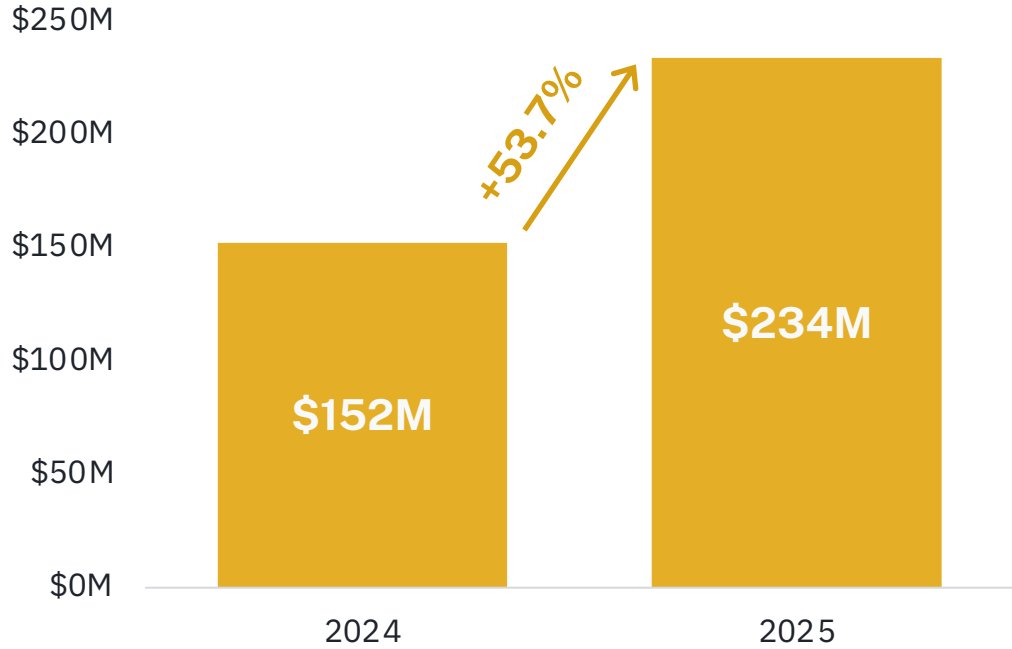


YOY CATEGORY GROWTH



GF Dairy & Dairy Alternatives have seen an **53.7%** increase in sales

Dollar Sales of Gluten Free Dairy & Dairy Alternatives



Plant Based



Lactose Friendly



High Protein





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