



Exploring Sustainable Ingredients for Bakery Success: Trends and Market Insights



Presented by

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SPINS



Empowering the industry with wellness-focused data technology



Full market visibility

Understand the retail landscape to plan your next move and scale



Innovative retailers

Exclusive access to performance insights at natural, specialty & pet retailers integral to your growth



Product intelligence

Uncover unseen drivers of wellness consumer purchase behavior



Leading Technology

Dynamic insights at your fingertips to inform your strategy

The Natural Channel is a hub for innovation, and a lens for future trends in the Natural Products Industry



INNOVATION
LEADING
RETAILERS



VOLUME
DRIVING
RETAILERS



NATURAL CHANNEL

- Focus on shopper discovery
- Retailers desire to differentiate
- More unique / exclusive items
- Lower barriers to entry for new brands

SPROUTS
FARMERS MARKET



FRESH THYME
MARKET

REGIONAL GROCERY

- Focus on local market needs (shoppers & brands)
- Bridge to mass – mix of unique and mainstream items
- Lower cost of entry

ROUSES MARKETS



CONVENTIONAL MULO

- Focus on convenience and shopper efficiency
- Traditionally “best seller” items
- High cost-of-entry / size-of prize

Kroger



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

BRANDS

OLiPOP



RYSE

suja
ORGANIC



PEPSICO

+ MORE

INVESTMENT & VC

INGREDIENT SUPPLIERS

RETAILERS

SPROUTS
FARMERS MARKET

GROCERYOUTLET
Bargain Market

Kroger

amazon



+ MORE

THE LANGUAGE OF
CPG INTELLIGENCE

MISSION-ALIGNED PARTNERS

New Hope.
NETWORK.

Naturally
NETWORK

nga
NATIONAL
GROCERS
ASSOCIATION



MEDIA & TECHNOLOGY

C A
FORTUNE
the consumer brands agency

PRESENCE

KeHE

UNFI
BETTER FOOD. BETTER FUTURE.



+ MORE

BROKERS & DISTRIBUTORS

SPINS WORKS WITH

233 Ingredient Supplier,
Broker, and
Association Partners



SPINS codes for 617
different Functional
Ingredients

617

1500+ Brands

SPINS codes every UPC
scanned at our retail partners
for 583 different types of
attributes

583

**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)

Identify Attributes Driving Performance

SPINS product library is the common language for the Natural Products Industry

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

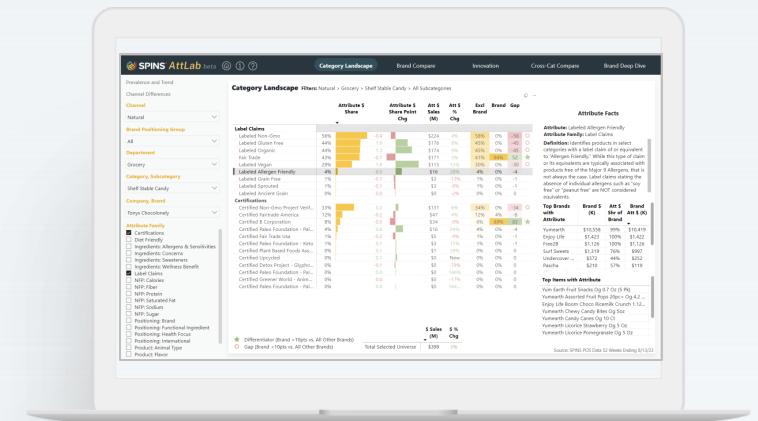
Lifestyle, Diets & Tribes

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

ACTIVATE



- ✓ Total Store Visibility
- ✓ Granular Attributes
- ✓ The Power of PowerBI

AttLab: Harnessing Consumer Trends for Brand Growth



Total Store Visibility

With comprehensive insight into **116 Categories**, you'll unlock a **full-picture** industry perspective that others might miss.



Granular Attributes

Explore the richness of our 350+ attributes that span 2M+ items to **decode what drives choices in this wellness era**.



The Power of PowerBI

Tap into **fast** and **easy-to-use** visuals of market trends with advanced PowerBI automation.

So you can... Innovate Confidently

Be confident in where to launch, what to launch, your competition, and the size of the opportunity.

Stand Out

Bring thought leadership to buyers and clear, convincing proof on why you deserve shelf space.



Sustainable Grains: A Healthy Growth Driver



What are Sustainable Grains?

Definition: grains that are resilient and adaptable, meaning they can grow in harsh conditions with minimal water and fertilizer inputs.

Sustainable Grains

Sustainable grains are frequently native to harsh growing climates which have allowed them to become highly resilient and adaptable to conditions like drought or pests! Grains in general don't require as much water as other crops, and many "ancient" and heirloom grains are more tolerant of extreme weather patterns than their commodity counterparts.

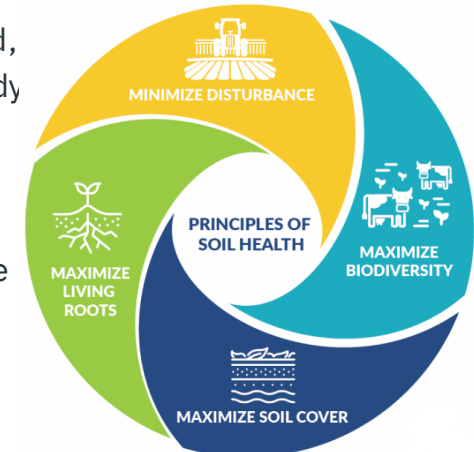
Sustainable cereal production systems involve enhanced biodiversity, living soils, use of integrated pest management, and low greenhouse gas emissions, simultaneously producing high-quality food and maintaining food security.

Sustainable grains offer immense value:

- Increased nutritional content
- Replenishment to soil health
- Reduced need for Herbicide usage

Mitigating Soil Disruption

- Biodiversity loss is threatening the world's food supply
- We rely on the soil for 95% of food, globally, but a third of it has already degraded
- Intensive agricultural practices disrupt soil structure
- Over-grazing and only growing one crop in the same area of land (monoculture) can also be highly damaging to soil





A Convenience Staple Since 1941

The last few decades of grains products have championed convenience and quick cooking times

CLASSICS

NEW WAVE

DISRUPTORS

The quick-cooking grains trend started in 1941, with the invention of Minute Rice as a solution for feeding World War II soldiers. Rice-A-Roni enhanced the fast grains market with the introduction of flavored rice-pasta combos in 1958, creating a microwaveable cup version in 2012. Ben's Original Boil-In-Bag rice launched in 1988, making cooking grains easier than ever. Convenient ready-to-heat options are now available across a wide variety of grains.





Rise Of Global Grains With Unique Advantages

Ancient grains like couscous, quinoa, and farro germinate renewed interest on American grocery shelves

CLASSICS

NEW WAVE

DISRUPTORS

As shoppers begin to seek more than just convenience from their grains, ancient staples from all over the world like couscous, quinoa, and farro become some of the first alternatives to rice and wheat that gain widespread popularity on shelf.

Whether for their inherent versatility and quick cooking times (couscous), potent nutritional benefits (quinoa), or unique flavor profile (farro), the growth of these grains demonstrated that shoppers were more than willing to experiment with this portion of the plate.



Farro

- Found in the tombs of Egyptian Kings and believed to have been eaten by Ancient Roman soldiers
- Distinct nutty flavor that lends itself to sweet and savory dishes



Quinoa

- Originated in Peru and Bolivia around 5000–3000BC
- Source of complete, plant-based protein, with all 9 essential amino acids



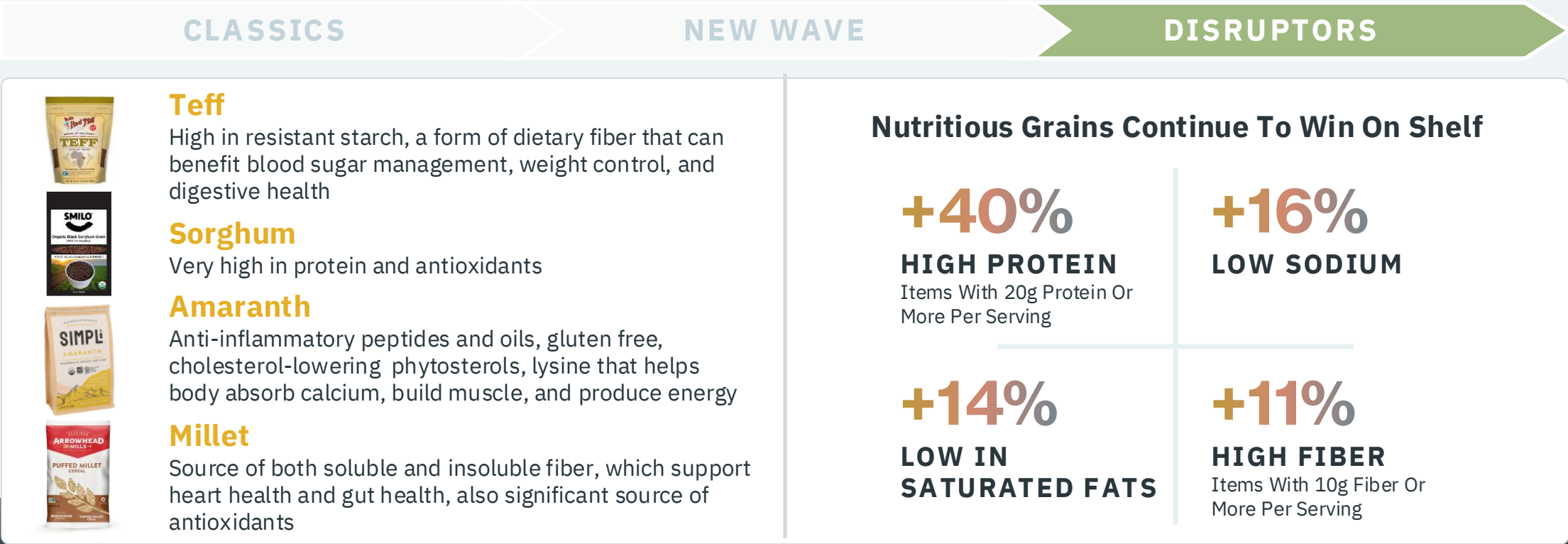
Couscous

- Developed by Berbers in Northwest Africa as early as 11th century
- Small grain size naturally lends rapid cooking time and ability to absorb variety of seasonings



Nutrition Takes Center Stage

Grains continue to diversify as consumers increasingly seek out nutritional benefits in all parts of the plate





Sorghum

Quinoa

Farro

Buckwheat

Millet

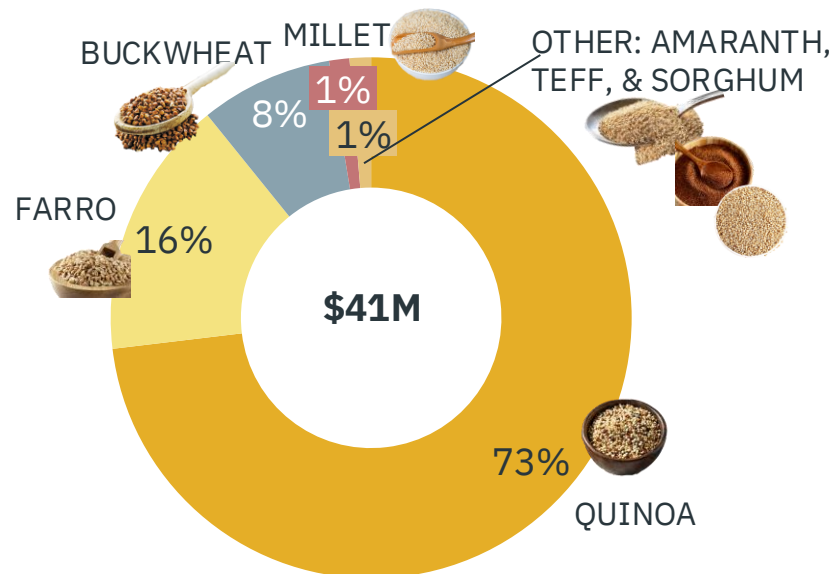
Amaranth

Teff

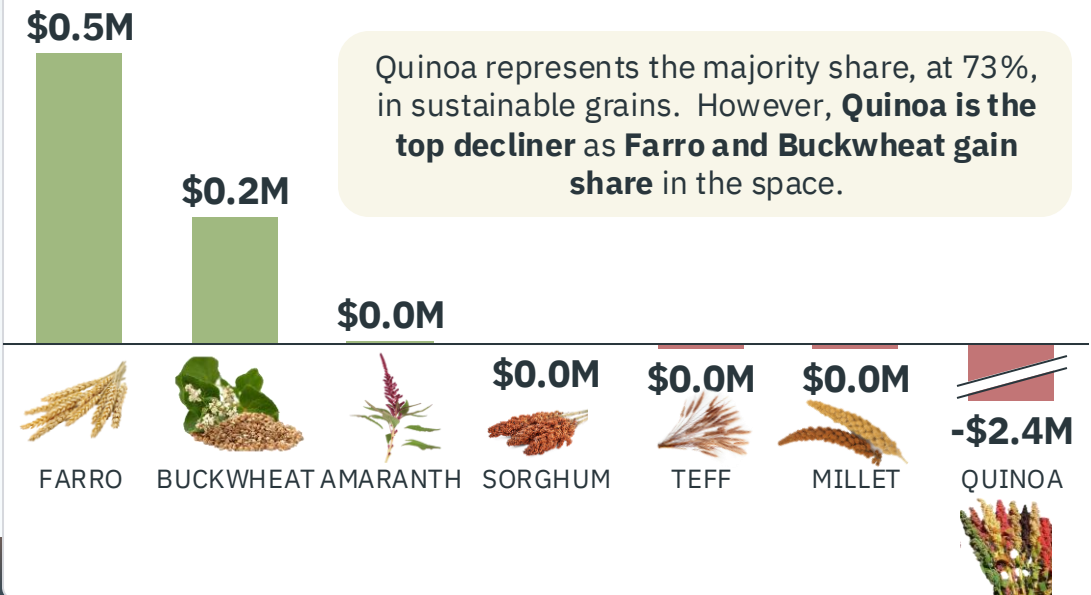


Quinoa declining by \$2M L52W: Farro & Buckwheat over-indexing on growth

\$ Size of Grain in Core 7 Sustainable Grains by % Share



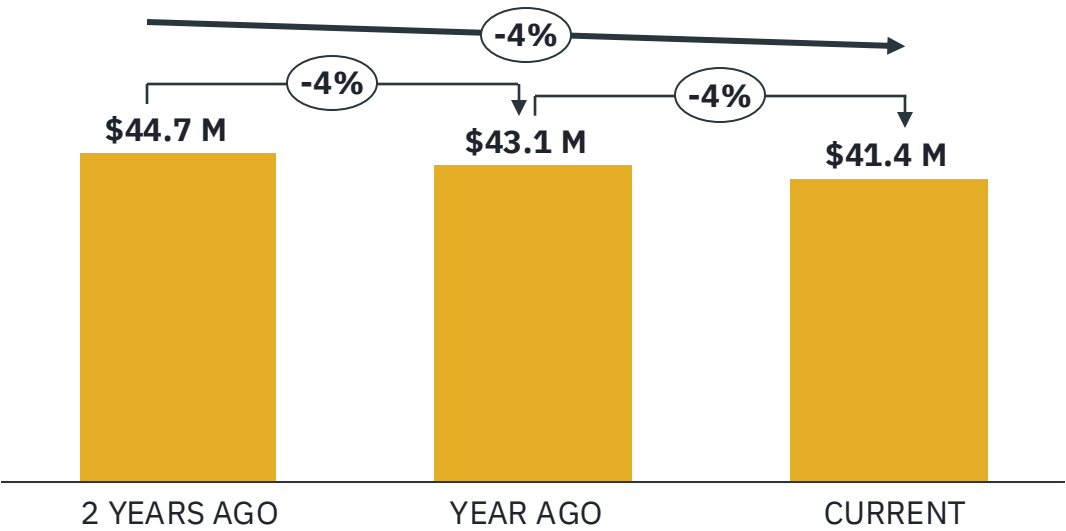
Core 7 Sustainable Grains by Abs \$ Growth





Sustainable grains declining 4% over L2yr: Future growth as a supporting ingredient

\$ Size and Growth of Core 7 Sustainable Grains



Farro, Buckwheat, and Amaranth show continued growth as a single product. Quinoa, Millet, Teff, and Sorghum are declining as a single product.
However, **all of these grains are showing fast growth as an ingredient across categories.**

SUBCATEGORY	\$ Sales L52W	\$ % Chg YA
QUINOA	\$30.2M	-7%
FARRO	\$6.7M	8%
BUCKWHEAT	\$3.4M	7%
MILLET	\$0.5M	-2%
AMARANTH	\$0.3M	1%
TEFF	\$0.2M	-5%
SORGHUM	\$0.1M	-2%



Quinoa

Native to the Andes Mountains, extremely nutritious, and adapted to high-altitude, dry environments.

ENTRY

Quinoa became popular in the health food scene in North America in the early 2000s. It is gluten-free, high in protein, and contains all nine essential amino acids.

The global quinoa market size was valued at \$406.93 million in 2022 and is expected to reach \$507.95 million by 2028.

PRESENT

Supporting Ingredient

New!

Nut & Seed Butters



+75%

Rice Cakes



+17%

Wellness Bars



FUTURE

As Lima, Peru has quickly become home to some of the world's top restaurants, we continue to see quinoa innovating as a supporting ingredient in categories that correlate to Peruvian recipes.

Ready-to-Eat

for a hearty & nutritious addition



Plant-Based Products

Protein + Whole Ingredient addition



Beverage

Paired with functional ingredients



+9%

Peruvian Cuisine

Total FZ, RF, & Grocery

SUSTAINABLE GRAINS: WHAT'S CHANGING?



Farro

Now an Italian staple, this ancient grain is originally from the Middle East. Not only drought and pest-resistant but also fast-growing and high-yield.

ENTRY

Farro is among the most ancient cereal crops of the Mediterranean region. It gained popularity in the US primarily over the past decade due to the growing interest in whole grains and healthier eating.

The global farro market size was valued at \$178.9 million in 2020, and is projected to reach \$513.8 million by 2030.

PRESENT

Supporting Ingredient

+67%
Baking Mixes



+49%
Crackers & Crisp Breads



+11%
Pasta



FUTURE

The Mediterranean Diet continues to grow; made popular by diet specific cookbooks and healthy eating documentaries like “Live to 100: Secrets of Blue Zones”.

Farro is a key component to Mediterranean eating and is being incorporated into dishes for the whole family.

Entrees
Kitchen and love



Baby Food
Sustainable + Nutrition forward



+1%

Mediterranean Diet

Total FZ, RF, & Grocery



Buckwheat

Gluten-free East Asian grain adapted to high altitudes and variable climates. Has a short growing season and returns nutrients to the soil.

Breakfast

Adding nutritional value and texture to an extra crunchy breakfast



+11%
Granola

+7%

Buckwheat Hot Cereal



Snacking

Swapping out unenriched flours for buckwheat flour



+3%
Cookies

+26%

Crackers & Crispbreads



Innovation

Soba Tea is made from roasted buckwheat, prominent in Asia as an anti-inflammatory, and is gaining popularity in the US. As this evolution continues, with the push from consumers for more innovation in better for you beverage, there is opportunity for soba based Kombucha.

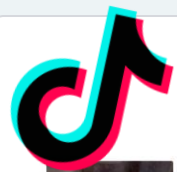


+3%
Kombucha
Subcategory



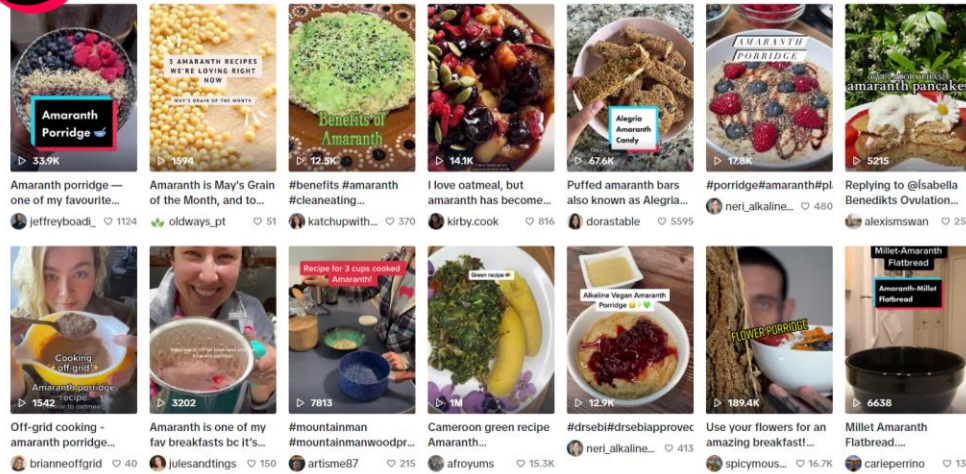
Amaranth

Pest and drought-resistant Mesoamerican grain that grows quickly. Naturally anti-inflammatory and low cholesterol.



Tik Tok Presence

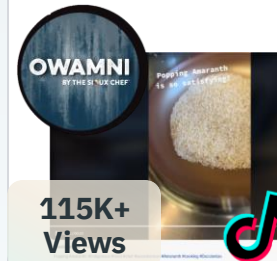
Amaranth Recipes



Tik Tok expands consumer knowledge on Amaranth and how to incorporate it into recipes for cooking at home.

Expansion of Amaranth

Influencers, like Chef Sean Sherman from Owamni restaurant, have played an important role with consumer familiarity to indigenous ingredients like Amaranth.



Chef Influence

Sean Sherman is an Oglala Lakota Sioux chef, cookbook author, forager, and promoter of indigenous cuisine with continued involvement the at Natural Product Expo.

Native American products are up **8%** across FZ, RF, and Grocery Departments



CPG Expansion

Amaranth is increasingly being used in categories across grocery gearing towards better you and better for the plant products.

Amaranth as an ingredient is up **31%** in **SS Cold Cereals** and up **86%** in **SS Chips – Vegetable & Other**



Gluten Free Grain Trio

Millet, Teff, and Sorghum are all gluten free grains that are commonly used as flour alternatives and flour mixes in allergen friendly products. Furthermore, these flours can each be used as a nutritious thickening agent.

Millet

Found across Asia and Africa, well known sustainable grain with the highest calcium content of cereal grains.

+15%

Cold Cereals



Teff

Nutritionally dense Ethiopian grain with super high yields—one pound of seeds can produce an entire acre of crops.

+11%

Snacks



Sorghum

Mineral-rich, drought and pest-resistant East African grain frequently used for gluten-free bread.

+25%

SS Sweeteners





Brands succeeding in **Grains** are addressing **Consumer Mentality Shifts**



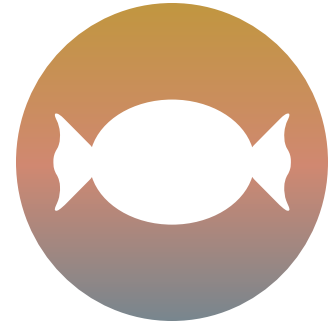
**Lifespan to
Healthspan**



**New Global
Notions**



**Protecting
the Planet**



**Intentional
Indulgence**



Thank you!

- For more information contact me at asnowwhite@spins.com



Appendix

Attribute Insights: Product Intelligence

Brands and retailers need to understand attributes to win with the Values Oriented Shoppers

Our 325+ attributes each fall in an attribute family

Label Claims
Certifications
Ingredients
Diet Friendly
Product Facts
Product Positioning
Nutrition Fact Panel



Note: Not all attributes are shown
Source: SPINS



Label Claims & Certifications

SPINS Label Claims Coding (Attribute Values, 29) & SPINS Certification Coding (Attribute Values, 19)

CERTIFIED - AMERICAN HEART ASSOCIATION - CHECK

CERTIFIED B CORPORATION

CERTIFIED DETOX PROJECT - GLYPHOSATE RESIDUE FREE

CERTIFIED FAIR TRADE USA

CERTIFIED FAIRTRADE AMERICA

CERTIFIED GREENER WORLD - ANIMAL WELFARE

CERTIFIED GREENER WORLD - GRASSFED

CERTIFIED GREENER WORLD - NON GMO

CERTIFIED MARINE STEWARDSHIP COUNCIL

CERTIFIED NON-GMO PROJECT VERIFIED

CERTIFIED PALEO FOUNDATION - GRAIN FREE

CERTIFIED PALEO FOUNDATION - KETO

CERTIFIED PALEO FOUNDATION - PALEO

CERTIFIED PALEO FOUNDATION - PALEO FRIENDLY

CERTIFIED PALEO FOUNDATION - PALEO VEGAN

CERTIFIED PLANT BASED FOODS ASSOCIATION

CERTIFIED REGENERATIVE ORGANIC

CERTIFIED UPCYCLED

CERTIFIED WHOLE GRAINS COUNCIL

LABELED ALCOHOL FREE

LABELED ALLERGEN FRIENDLY

LABELED ALUMINUM CHLOROHYDRATE FREE

LABELED ALUMINUM FREE

LABELED ANCIENT GRAIN

LABELED ANIMAL WELFARE

LABELED ANTI AGING

LABELED ANTIBIOTIC FREE

LABELED ANTIOXIDANT

LABELED CAGE FREE

LABELED CORAL REEF SAFE

LABELED FAT

LABELED FLUORIDE FREE

LABELED FRAGRANCE FREE

LABELED FREE RANGE

LABELED GLUTEN FREE

LABELED GRAIN FREE

LABELED GRASS FED

LABELED NITRATE FREE

LABELED NO ADDED HORMONES

LABELED NON-GMO

LABELED ORGANIC

LABELED PARABEN FREE

LABELED PASTURE RAISED

LABELED PROPYLENE GLYCOL FREE

LABELED SODIUM LAURYL SULFATE FREE

LABELED SPROUTED

LABELED UNSCENTED

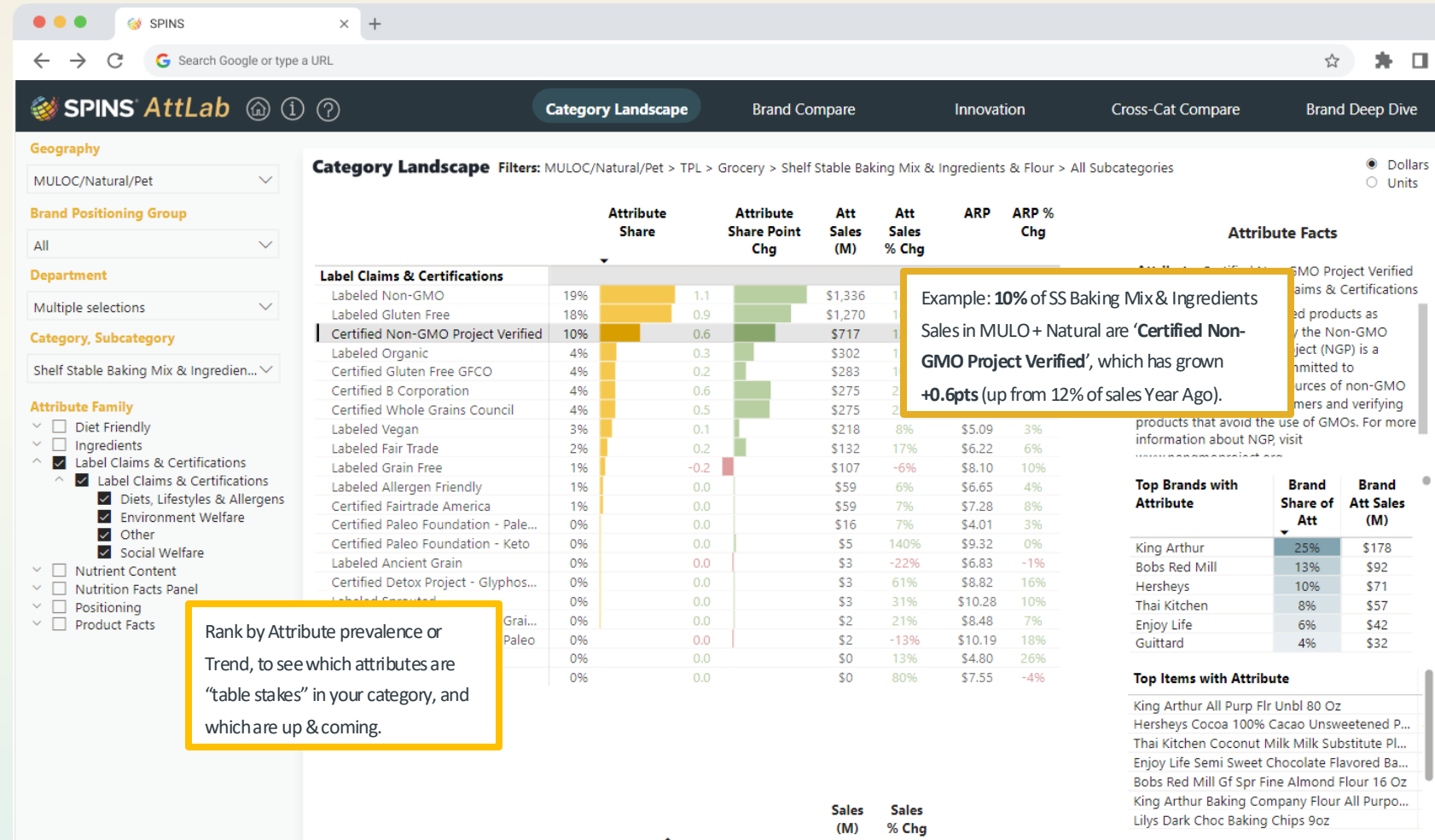
LABELED VEGAN

Product Intelligence – SPINS AttLab



Identify which attributes are most valuable to consumers *and* are brand differentiators, to optimize your **marketing**.

Plus, demonstrate your data-driven expertise on the category's attribute trends and your brand advantages in your **retailer sell-stories**.



Product Intelligence – SPINS AttLab



With Brand Compare, benchmark your brand vs. key competitors to identify product advantages and gaps.

Geography

MULOC/Natural/Pet

Brand Positioning Group

All

Department

Multiple selections

Category, Subcategory

Shelf Stable Baking Mix & Ingredien...

Attribute Family

☐ Diet Friendly

☐ Ingredients

☒ Label Claims & Certifications

- ☒ Label Claims & Certifications
 - ☒ Diets, Lifestyles & Allerge...
 - ☒ Environment Welfare
 - ☒ Other
 - ☒ Social Welfare

☐ Nutrient Content

☐ Nutrition Facts Panel

☐ Pos...

☐ Pro...

Brand Compare

Filters: MULOC ... > TPL > Grocery > Shelf Stable Baking Mix & Ingredients & Flour > All Subcategories

Select Brands Using CTRL button

	Sales	Sales % Chg
Betty Crocker	\$772,470,686	-0%
Nestle Toll House	\$441,161,282	9%
Pillsbury	\$348,201,791	2%
Ghirardelli	\$313,792,142	10%
Duncan Hines	\$295,654,723	2%
Carnation	\$292,611,839	5%
King Arthur	\$273,732,345	25%
Krusteaz	\$245,531,096	3%
Maseca	\$229,217,753	21%
Gold Medal	\$228,197,000	2%
Kodiak Cakes	\$175,833,477	10%
Bobs Red Mill	\$171,661,119	12%
Pearl Milling Com...	\$148,833,255	-4%
Crisco	\$146,401,258	-3%
Jiffy	\$141,394,189	5%
Hersheys	\$124,655,211	8%
Bisquick	\$119,828,603	-2%
Arm & Hammer	\$117,520,726	9%
Borden Eagle Brand	\$115,474,992	7%
White	\$114,342,426	3%
White	\$81,003,850	-31%
White	\$79,557,961	16%
White	\$70,075,787	28%
White	\$67,255,758	12%
White	\$67,076,997	-0%
Goya	\$65,023,364	4%
Nestle	\$58,557,967	13%
Thai Kitchen	\$56,635,764	5%
Red Lobster	\$54,748,029	15%
Lilys	\$51,390,452	-0%
White	\$51,345,640	11%

Label Claims & Certifications

	Bobs Red Mill	King Arthur	Kodiak Cakes
Labeled Non-GMO	85%	99%	51%
Certified Non-GMO Project Verified	54%	65%	0%
Certified B Corporation	0%	98%	0%
Labeled Gluten Free	66%	20%	0%
Labeled Organic	17%	13%	
Certified Whole Grains Council	9%	18%	
Certified Gluten Free GFCO	0%	19%	
Labeled Grain Free	28%	0%	
Labeled Fair Trade	5%	0%	0%
Labeled Vegan	4%	0%	0%

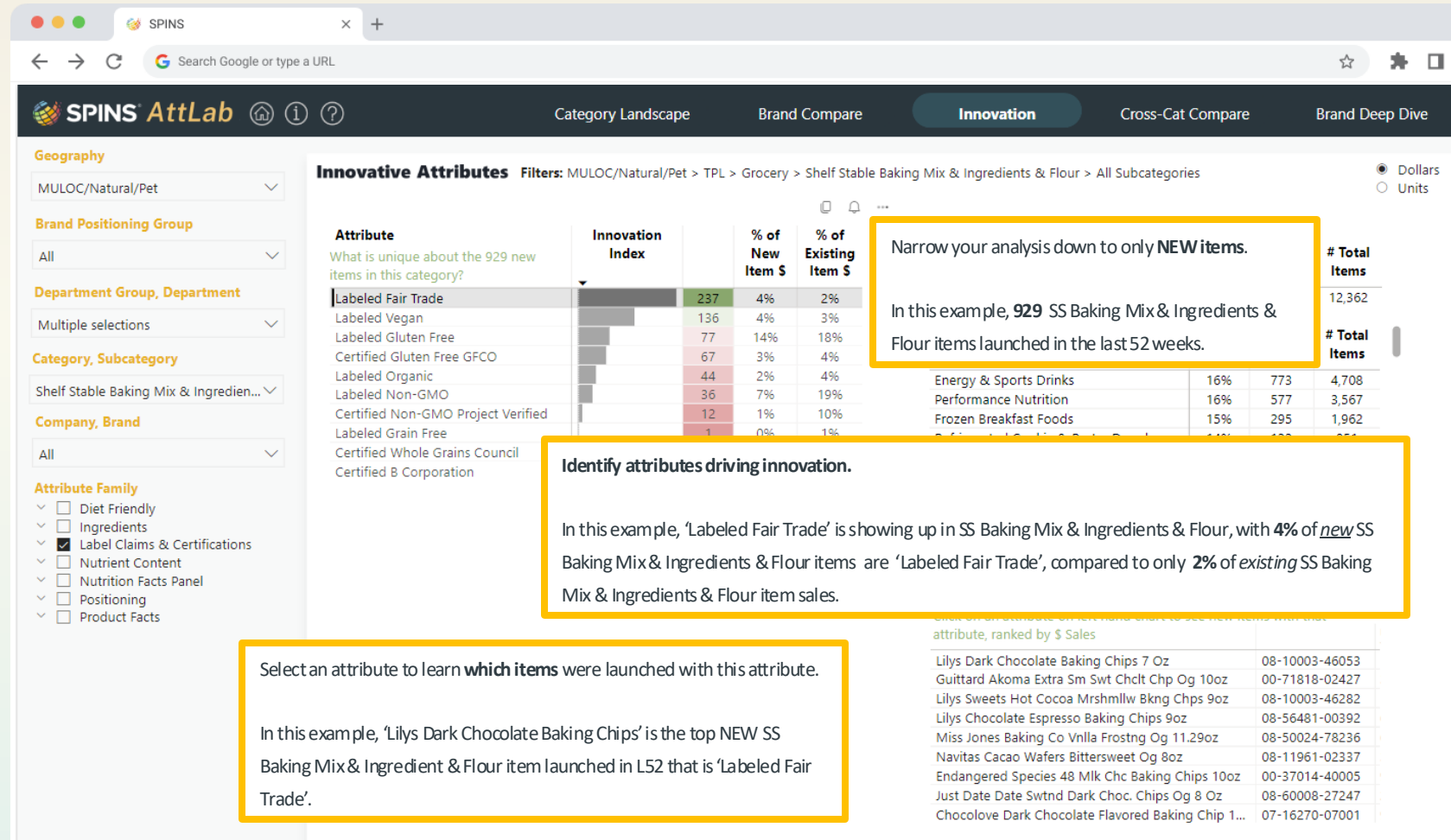
View all brands in your category, then select your competitive set of brands.

Quickly generate a brand “tear apart” to illustrate your advantages to retailers.

Product Intelligence – SPINS AttLab



Each month, identify which attributes are driving the latest product launches, to inform your **innovation pipeline** and **stay ahead of the competition**.



Product Intelligence – SPINS AttLab



Monitor attribute trends growth across **total store**, to identify your brand's top opportunities for adjacent category expansion.

Geography

Select **TOTAL STORE**, or filter based on certain departments.

Department

All

Company, Brand

All

Attribute Family

- ☐ Diet Friendly
- ☐ Ingredients
- ☒ Label Claims & Certifications
 - ☒ Label Claims & Certifications
 - ☒ Animal Welfare
 - ☒ Clean Label
 - ☒ Diets, Lifestyles & Allergens
 - ☒ Environment Welfare
 - ☒ Other
 - ☒ Social Welfare
 - ☐ Nutrient Content
 - ☐ Nutrition Facts Panel
 - ☐ Positioning
 - ☐ Product Facts

Cross-Category Compare Filters: MULOC/Natural/Pet > TPL > All Depart

Select 1 Attribute Value: Certified Non-GMO Project Verified

Categories	Total Cat \$ (M)	Att \$ (M)	Att % of Cat	Chg	Cat's % Chg
Performance Nutrition	\$1,263	\$401	32%	6.1	25%
Shelf Stable Fruits & Vegetables	\$5,502	\$1,733	32%	0.1	-1%
Shelf Stable Nut & Seed Butters	\$2,341	\$666	28%	0.4	2%
Shelf Stable Hot Cereals	\$1,529	\$418	27%	-0.9	-6%
Refrigerated Yogurt & Plant Based Yo...	\$9,643	\$2,593	27%	-0.6	6%
Refrigerated Juices	\$6,451	\$1,727	27%	0.4	-1%
Shelf Stable Nuts & Trail Mix & Dried ...	\$4,649	\$1,179	25%		
Shelf Stable Pickles & Olives	\$2,895	\$471	16%		
Wellness Bars & Gels	\$3,430	\$521	15%		
Shelf Stable Crackers & Crispbreads	\$7,927	\$1,090	14%		
Shelf Stable Rice Cakes	\$387	\$49	13%		
Shelf Stable Cold Cereals	\$9,440	\$1,183	13%		
Shelf Stable Juices	\$8,646	\$944	11%		
Aromatherapy & Body Oils	\$319	\$34	11%		
Produce	\$31,650	\$3,315	10%	-1.3	5%
Shelf Stable Baking Mix & Ingredients...	\$7,169	\$717	10%	0.6	5%
Refrigerated Condiments	\$1,231	\$121	10%	0.4	5%
				-0.6	1%
				0.0	1%
				0.2	3%
				0.2	2%
				0.9	-4%
				0.2	-3%
				1.3	-4%
				0.2	1%
Dairy & Plant Based Dairy Alternative...	\$9,472	\$619	7%	0.3	2%
Shelf Stable Condiments & Dressing ...	\$12,919	\$798	6%	0.1	4%

Example: This selected attribute we can see here it's growing across Total Food & Bev as well.

See more detail for a selected subcategory.

Example: What are the top 'SS Baking Mixes & Ingredients & Flour' brands that are 'Certified Non-GMO Project Verified'?

Select 1 attribute of interest, then view its prevalence and trend across ALL subcategories.

Attribute Facts

Attribute: Certified Non-GMO Project Verified
Attribute Family: Label Claims & Certifications

Definition: Reflects certified products as communicated to SPINS by the Non-GMO Project. The Non-GMO Project (NGP) is a nonprofit organization committed to preserving and building sources of non-GMO products, educating consumers and verifying products that avoid the use of GMOs. For more information about NGP visit

Top Brands with Attribute	Brand Share of Att	Brand Att Sales (M)
King Arthur	25%	\$178
Bobs Red Mill	13%	\$92
Hersheys	10%	\$71
Thai Kitchen	8%	\$57
Enjoy Life	6%	\$42
Guittard	5%	\$32

Top Items with Attribute

King Arthur All Purp Flr Unbl 80 Oz
Hersheys Cocoa 100% Cacao Unsweetened Pw
Thai Kitchen Coconut Milk Milk Substitute Plair
Enjoy Life Semi Sweet Chocolate Flavored Bakir
Bobs Red Mill Gf Spr Fine Almond Flour 16 Oz
King Arthur Baking Company Flour All Purpose

Product Intelligence – SPINS AttLab



Dive even further into one specific attribute, to see which brands are the top players, and which brands are driving the attributes growth.

SPINS AttLab

Category Landscape Brand Compare Innovation Cross-Cat Compare Brand Deep Dive

Geography: MULO/Natural/Pet

Brand Positioning Group: All

Department: Multiple selections

Category, Subcategory: Shelf Stable Baking Mix & Ingredien...

Attribute Family: ☐ Diet Friendly ☐ Ingredients ☒ Label Claims & Certifications ☒ Label Claims & Certifications ☐ Nutrient Content ☐ Nutrition Facts Panel ☐ Positioning ☐ Product Facts

Brand Deep Dive Filters: MULO/Natural/Pet > TPL > Grocery > Shelf Stable B

Select 1 Attribute Value: Certified Non-GMO Project Verified

Select 1 attribute of interest, then see in detail which brands are driving that attribute's growth.

Certified Non-GMO Project Verified

Total Attribute Sales (000): 716,573

Total Attribute Sales % Chg: 12%

of Brands with Attribute: 127

Top Brand (Latest 52 Sales): King Arthur

Top Grower (Pos Sales Chg): King Arthur

Top Decliner (Neg Sales Chg): Blue Diamond

Brands with Attribute

	Share of Att	Sales (000)	Sales % Chg	Sales Chg (000)	% of Att Growth	Fair Share Index	Att Shr of Brand	Pt Chg
King Arthur	25%	\$178,410	21%	\$30,375	36%	145	65%	-2.7
Bobs Red Mill	13%	\$92,008	12%	\$9,973	12%	92	54%	0.1
Hersheys	10%	\$71,109	5%	\$3,303	4%	40	57%	-1.7
Thai Kitchen	8%	\$56,636	5%	\$2,587	3%	39	100%	0.0
Enjoy Life	6%							0.1
Guittard	4%							0.2
White Lily	4%							-1.7
Simple Mills	4%							0.1
Lilys	3%							0.1
Rumford	2%							-1.3
Birch Benders	2%	\$15,018	24%	\$2,951	4%	167	45%	14.9
Arrowhead Mills	2%	\$11,401	33%	\$2,813	3%	210	100%	5.4

Select a brand to see other attributes in the same family.

In this example, 98% of King Arthur is 'Certified Non-GMO Project Verified'.

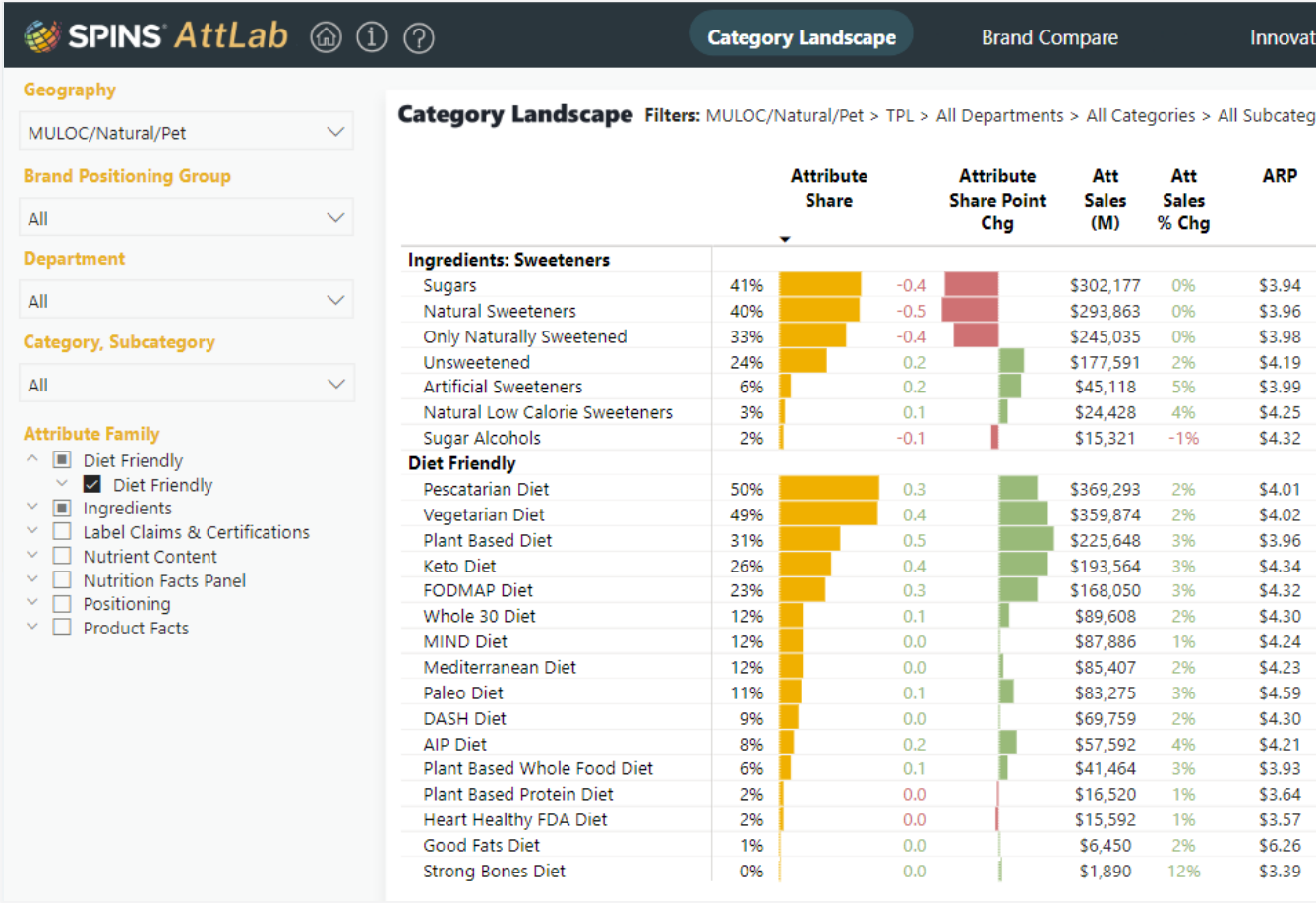
Top 10 Certified Non-GMO Project Verified items for King Arthur:

King Arthur All Purp Fir Unbl 80 Oz
King Arthur Baking Company Flour All Purpose 5lb
King Arthur Baking Company Flour All Purpose 3lb
King Arthur Unbleached White Flour 160 Oz
King Arthur Baking Company Flour Bread 5lb
King Arthur Baking Company Pancake Mix Box 15oz
King Arthur Baking Company Cocoa Brownie Mix Box 17...

All Label Claims & Certifications values for King Arthur:

	Att S Shr of Brand	Pt Chg
Labeled Non-GMO	99%	-0.5
Certified B Corporation	98%	-0.7
Certified Non-GMO Project Verified	65%	-2.7
Labeled Gluten Free	20%	-0.9
Certified Gluten Free GFCO	19%	-1.5
Certified Whole Grains Council	18%	-0.9
Labeled Organic	13%	0.7

Consumers have more choices than ever before in products they purchase to meet their individual health goals, lifestyles, and values. AttLab puts **SPINS’ entire attribute database at your fingertips**, so you can deliver against those trends.



AttLab: Harnessing Consumer Trends for Brand Growth



Total Store Visibility

With comprehensive insight into **116 Categories**, you'll unlock a **full-picture** industry perspective that others might miss.



Granular Attributes

Explore the richness of our 350+ attributes that span 2M+ items to **decode what drives choices in this wellness era**.



The Power of PowerBI

Tap into **fast** and **easy-to-use** visuals of market trends with advanced PowerBI automation.

So you can... Innovate Confidently

Be confident in where to launch, what to launch, your competition, and the size of the opportunity.

Stand Out

Bring thought leadership to buyers and clear, convincing proof on why you deserve shelf space.

SPINS Provides a **Comprehensive Solution**



Omni-intelligence Data Platform

- Natural, Regional, and eCommerce Channel and Key Account (Proprietary)
- Conventional Channel and Key Account (in partnership with IRI Worldwide)
- Amazon Data
- Store-Level Data



Insights & Measurement Applications

- SATORI (Cross-Channel Reporting)
- Signals (Store-Level Reporting)
- PowerTabs (Excel-Based Reporting)
- TradeROI (CGS)



Consumer & Product Activation

- Omni-Commerce Where-to-Buy (Destini)
- Shoppable Landing Pages (Destini)
- Shoppable Recipes (Destini)
- Digital Couponing (Destini)
- Product Activation Manager (Pinto)



Product Intelligence

- Product Attributes
- Certifications & Label Attributes
- Nutrition Information
- High-Quality Product Images



Insights & Growth Consulting (CGS)

- Client Insight Manager
- JumpStart & Insight Sprint Program
- Price & Promo Strategy (CGS)
- Category Assessments (CGS)
- Competitive Landscape (CGS)
- Consumer Panel



Data Blending Solutions (DAAP)

- Data Extraction
- Data Harmonization
- Data Visualization
- Integration with 3rd-Party BI Tools

The **SPINS** Advantage



Retail Coverage

SPINS offers the **most complete market view** across the full retail landscape

Exclusive to SPINS

Natural Grocery

Regional & Independent Grocery

Pet

eCommerce

Conventional



Product Intelligence

SPINS provides the industry's leading Product Intelligence Platform to align **product attributes** with **consumer preferences**

Exclusive to SPINS

Certification

Ingredient

Label Claim

Nutrition Panel

Positioning

Package & Product



Applications & Insights

SPINS delivers on-demand insights through **intuitive applications** and **deep industry acumen**

Exclusive to SPINS

Business Intelligence

Data Harmonization

Trade Promotion Tools

Growth Consulting

AVAILABLE AT SPINS

AttLab has built-in training to empower users to learn as they go

Users can navigate to attribute training via buttons on the home page and the FAQ page.

Click here to learn about SPINS Attribute Types

SPINS AttLab beta

?

Welcome to AttLab

Consumers have more choices than ever before in products they purchase to meet their individual health goals, lifestyles, and values. To succeed in today's marketplace, **suppliers must deliver against increasingly nuanced preferences.**

AttLab puts SPINS' entire attribute database at your fingertips, to allow you to do just that.

Click a dashboard below to navigate

Explore Many Attributes with these dashboards:

Category Landscape

The attribute lay of the land, for Total Store, Total F&B, or a particular category

Brand Compare

A competitor "tear-apart" to explore which brands offer what, side by side

Innovation

What new, unique attributes are popping up in recent launches?

Dive Into 1 Attribute with these dashboards:

Cross-Category Compare

View any one attribute's growth across *all* categories in Total Store

Brand Deep Dive

Within an attribute, who owns the space and who's growing it?

Click here to learn about SPINS Attribute Types

SPINS AttLab beta

Back to FAQ

Attribute Training

There are 5 Types of SPINS attributes, each comes from different sources

Attribute Type	Source: Product Label Image				Source: Off-Label	
	Label claims on product label	Ingredient statement on product label	Nutrition fact panel on product label	Any other info on product label	Off-Label Info (Website, Media, etc.)	Direct from Certifier
LABEL CLAIMS Displayed as "Labeled..."	X					
CERTIFICATIONS Displayed as "Certified..."						X
INGREDIENTS Displayed as "Ingredient..."		X				
DIET FRIENDLY Displayed as "Diet..."		X	X			
NUTRITION FACT PANEL Displayed as "NFP Range..."			X			
POSITIONING No common display name	X	X			X	
PRODUCT FACTS No common display name	X			X		

Click on an attribute type to learn more about it!

SPINS AttLab beta

Attribute Training

Label Claims

Source: Product label image (any claims/copy on all sides of label)

Displayed in SPINS data as "Labeled..."

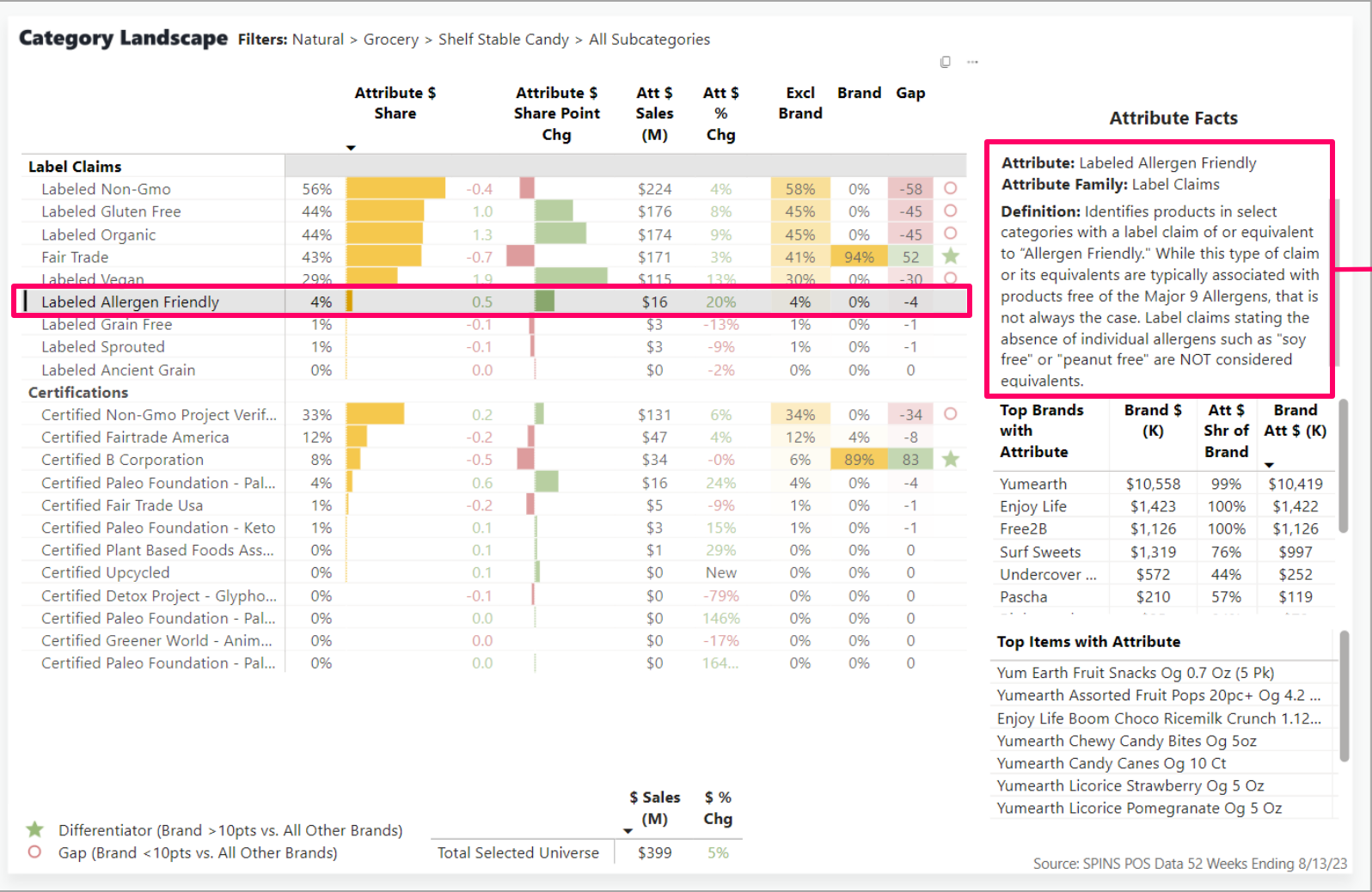
To receive these values, the claims need to be on the actual label. Web site or social media marketing claims are not sufficient.

SPINS currently codes for ~30 Label Claims

Examples:

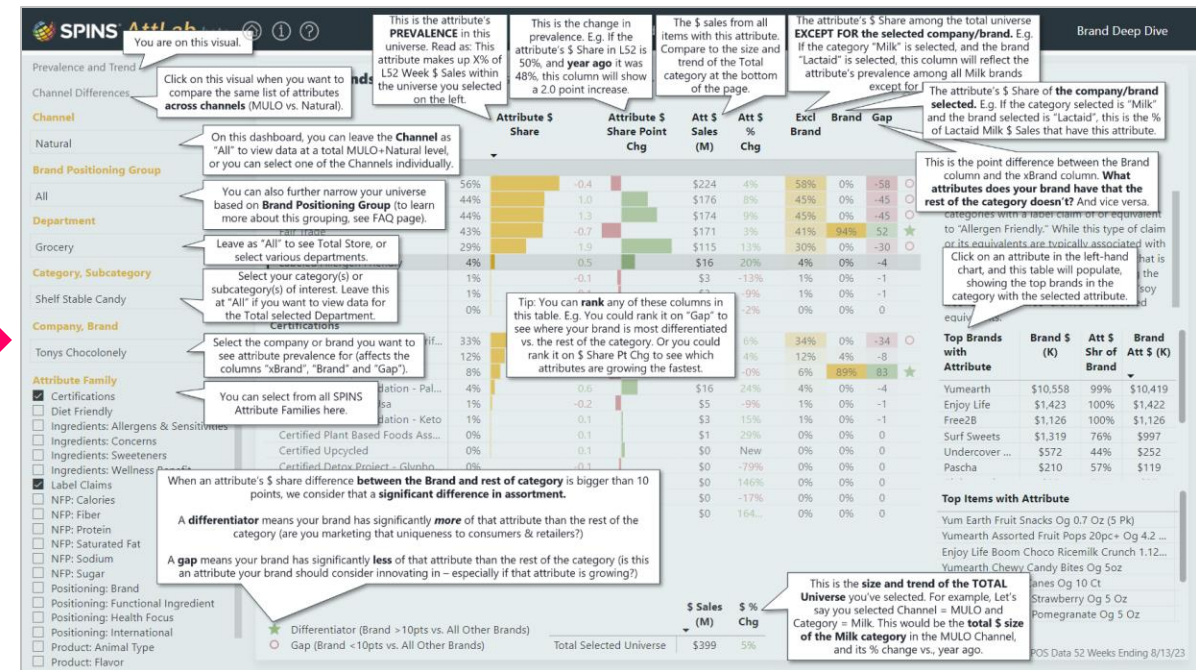
- Labeled Gluten Free
- Labeled Non-GMO
- Labeled Organic
- Labeled Vegan
- Labeled Animal Welfare
- Labeled No Added Hormones
- Labeled Paraben Free
- Labeled Grass Fed
- Labeled Aluminum Free
- Labeled Cage Free

AttLab has built-in training to empower users to learn as they go



SPINS PI definitions are built in, so that users can click on an attribute to see how we define it, as well as top brands and items with that attribute.

AttLab has built-in training to empower users to learn as they go

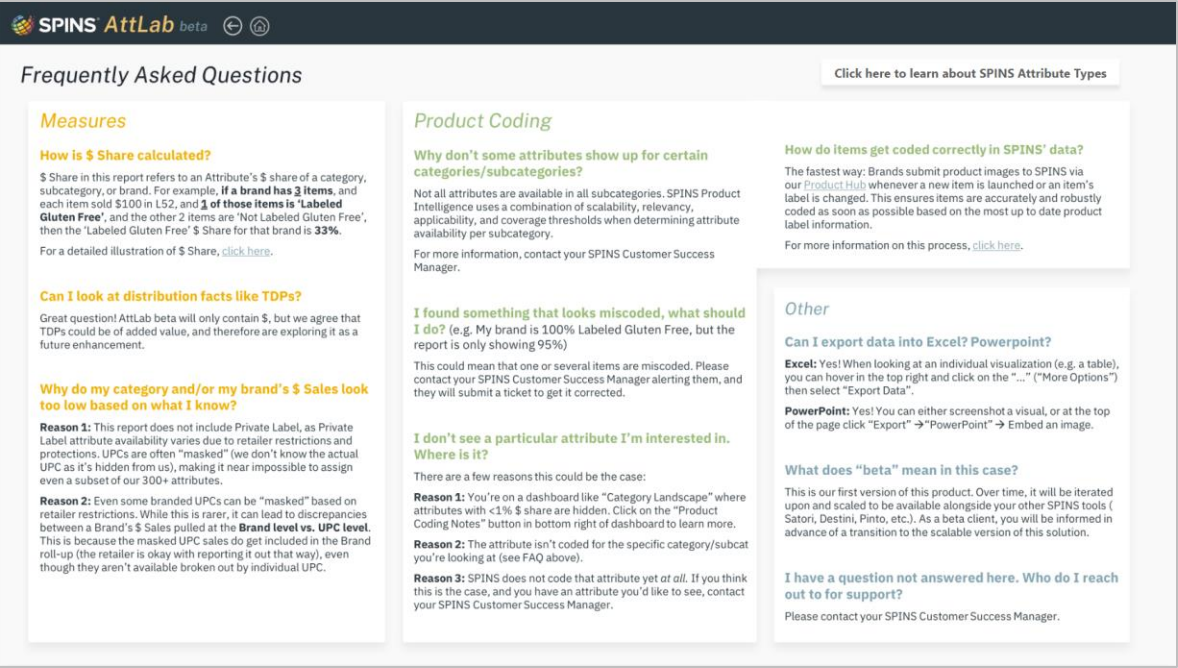
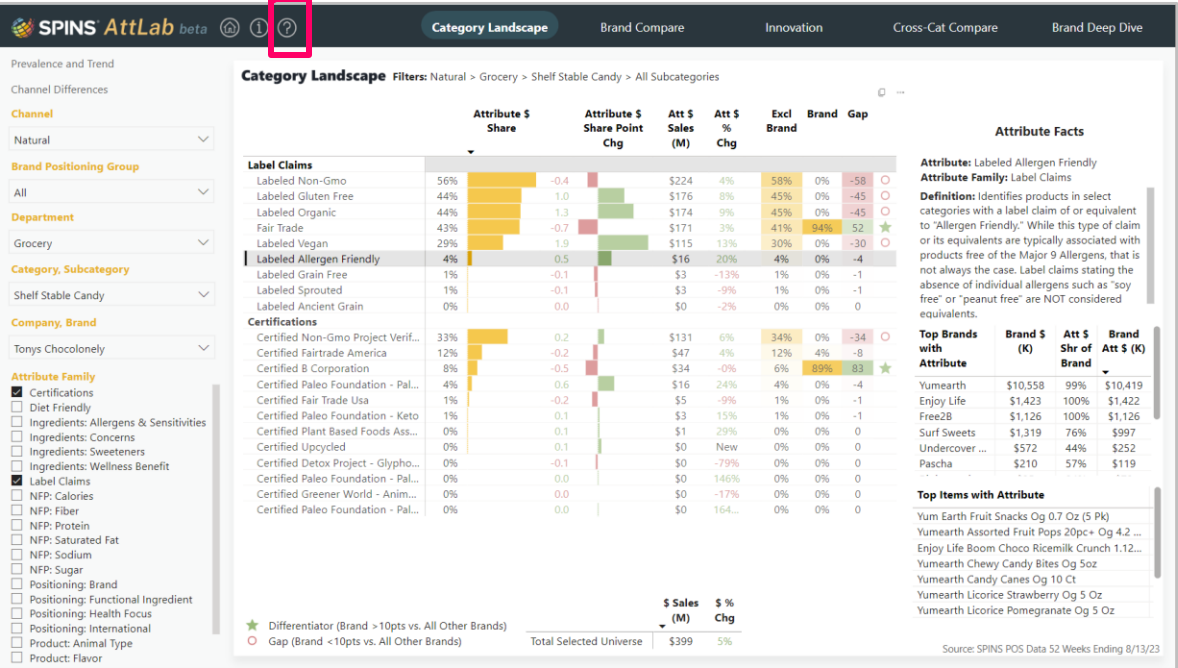


User can click anywhere to close info pane.

AttLab has built-in training to empower users to learn as they go



The “?” button on each dashboard takes the user to a page in the report that answers Frequently Asked Questions



User can click back button to return to the previous page they were on, or can go Home



Life Is What You Bake It

47%

of US adults bake regularly

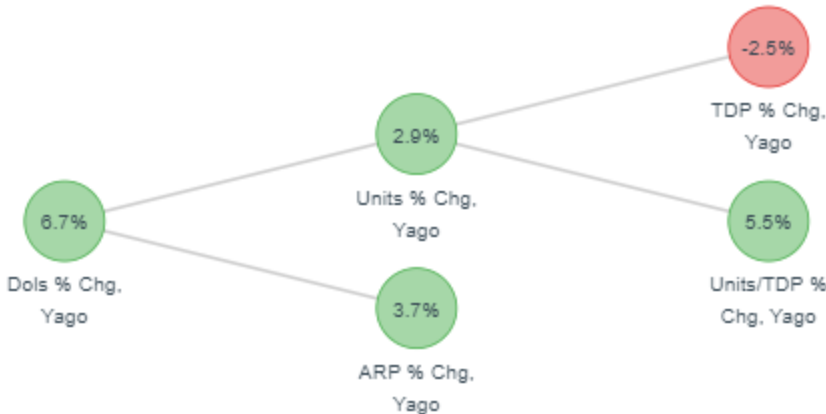
with

28%

doing so from scratch

19%

relying on mixes



\$ 8.8 B

Category Sales
MULO

6.7%

Category Growth
Dols, % Chg, YAGO



Baking Ingredients

↑ 7% in Sales, bringing in \$ 4.7 B

Top Brand

(Latest 52 Sales)



\$ 433.4 M
Up +9% \$
Down -1% U

Top Growing Brand

(Positive Sales Change)



\$ 70.0 M
Up +28% \$
Up +19% U

Top Declining Brand

(Negative Sales Change)



\$ 79.9 M
Down -35% \$
Down -35% U



Baking Mixes

↑ 2% in Sales, bringing in \$ 1.9 B

Top Brand (Latest 52 Sales)



\$ 563.6 M
Down -0.4% \$
Down -3% U

Top Growing Brand (Positive Sales Change)



\$ 5.3 M
Up +106% \$
Up -182% U

Top Declining Brand (Negative Sales Change)



\$ 8.0 M
Down -6% \$
Down -11% U



Flours

↑ 13% in Sales, bringing in \$ 1.5 B

Top Brand

(Latest 52 Sales)



\$ 229.7 M

Up +21% \$

Up +15% U

Top Growing Brand

(Positive Sales Change)



\$ 34.3 M

Up +52% \$

Up +48% U

Top Declining Brand

(Negative Sales Change)



\$ 10.9 M

Down -7% \$

Down -3% U



Pancake & Waffle Mixes

↑ 5% in Sales, bringing in \$ 654.6 M

Top Brand

(Latest 52 Sales)



\$ 138.0 M

Down -4% \$

Down -13% U

Top Growing Brand

(Positive Sales Change)



\$ 4.1 M

Up +63% \$

Up +64% U

Top Declining Brand

(Negative Sales Change)



\$ 1.6 M

Down -48% \$

Down -50% U

Surge in Sensitivities: Food Allergies Are On The Rise

Statistics Shed Light on the Impact of Food Allergies

Food Allergies Are Growing In Both U.S. Adults & Children

8% of children (approx. 6M) under 18 have food allergies

- Most common are peanut (2.2%), milk (1.9%), shellfish (1.3%) and tree nut (1.2%)
- Of children with food allergies, **40% are allergic to multiple foods**

11% of adults (at least 26M) have food allergies

16 foods are responsible for over 90% of food allergies



18%

of Americans say the presence of allergens in food is their most important food safety concern

20%

of SS Baking Mix & Ingredients & Flour sales in MULO + Natural are 'Major 9 Allergen Free', which had grown +0.7 pts (up from 9% of sales YA).

Concerns Over Food Safety: **Seeking Clean Products**

Overall confidence in the safety of the U.S. food supply is down significantly in 2024 with 62% saying they are confident in the safety of the U.S. food supply vs. 70% in 2023

35%

of Americans say having food labeled as having No Artificial Ingredients / Colors inform them of the safety of their food

30%

of Americans say food additives and ingredients is their most important food safety concern

57%

of SS Baking Mix & Ingredients & Flour sales in MULO + Natural are 'Vital Clean', which had grown +2.2 pts (up from 9% of sales YA).

Source: International Food Information Council. 2024 Food & Health Survey. June 20, 2024. <https://foodinsight.org/2024-foodhealth-survey/>

Source: SPINS POS Data 52 Weeks Ending 06/16/2024 | Grocery > Shelf Stable Baking Mix & Ingredients & Flour > All Subcategories