

Navigating Sweetness: Consumer Preferences and **Sugar Trends**



Presented by

Jessica Sebastian Herzog

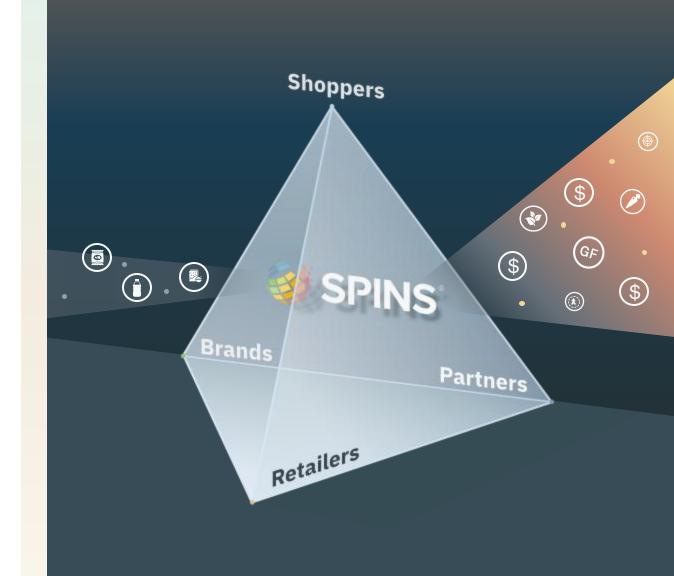
Account Manager SPINS



Connecting **Shopper Values** to **Product Innovation**

SPINS helps **shoppers** find products that match their preferences by helping:

- Retailers get the right assortment on their shelves
- Brands innovate and tell their story
- **Ecosystem partners** better serve their customers



SPINS WORKS WITH

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

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

SPINS Expansive Network

PROPRIETARY RETAIL CHANNELS AND PARTNERSHIPS

Proprietary to SPINS					Brand-Market Fit
Regional & Independent Grocery	Busch's	GROCERYOUTLET Dargain Market	Hardings FRIENDLY MARKETS	PYRAMID	90+
Natural Grocery	Bristol Farms	FRESH THYME	THE FRESH MARKET	SPROUTS FARMERS MARKET	135+
Vitamins & Supplements	THE VITAMIN SHOPPE	VITAMIN WORLD	PHARMACA"	The HEALTHY PLACE	6+
eCommerce	amazon	THRIVE -MARKET-	hive	Boston ORGANICS Fresh Organic Delivered.	7+
SPINS Pet Channel					
Pet	PETSMART	petco	O CHOICE PET	PetPeople ^a	20+
In partnership with IRI					
Conventional	⊙ TARGET	Kroger	⇔cvs	Wawa	84+

Identify Attributes **Driving Performance**

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



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



Top Reason for Limiting or Avoiding Sugars: Improve Diet

Followed by avoiding gaining weight and preventing a future health condition, which greatly increased in importance from previous years (35% last 2 years, up to 42%)

More than

3 in 4

Americans are limiting *or* avoiding sugars.

6 in 10 are cutting back on added sugars.

3 in 10 are cutting back on both added and natural sugars.

Top Reason for Limiting or Avoiding Sugars: Liking Sweet Tasting Foods & Drinks

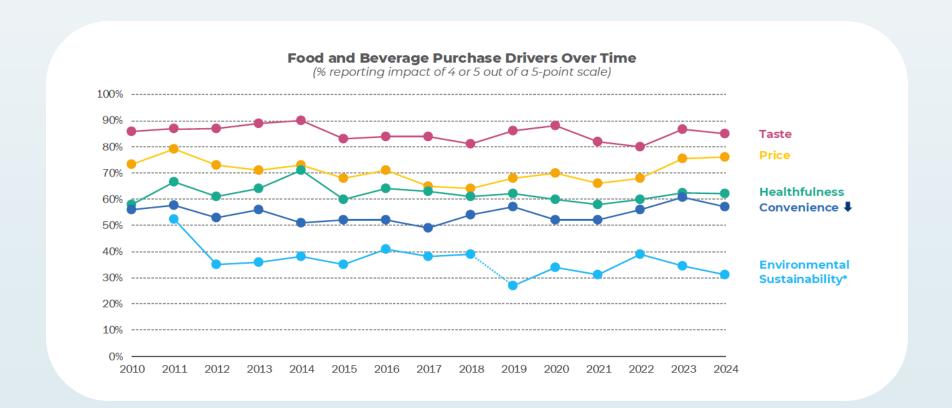
Followed by avoiding gaining weight and preventing a future health condition, which greatly increased in importance from previous years (35% last 2 years, up to 42%)

3 in 10
Americans prefer sugars as their sweetener.

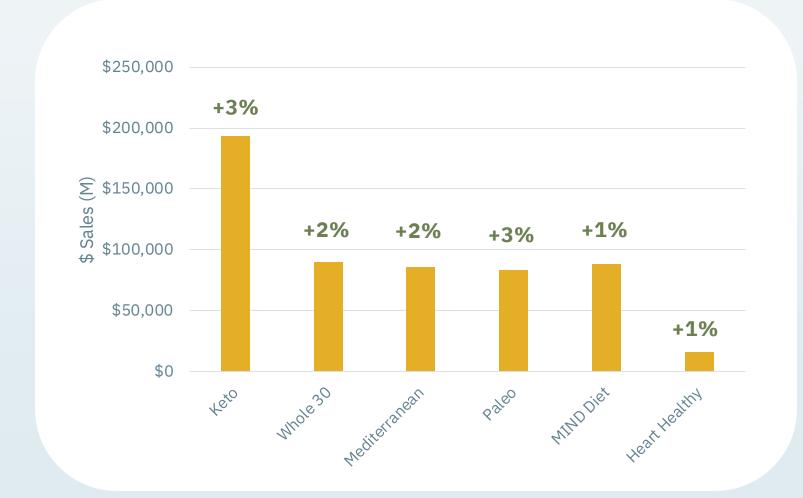
The top 2 reasons for preferring sugar over other types of sweeteners:
Natural Origin & Taste.

15% said sugar is in too many food/beverages to avoid.

The Sweet Life: Taste Remains the Top Purchase Driver



Avoidance of Sugars Seen In Diet Trends



43%

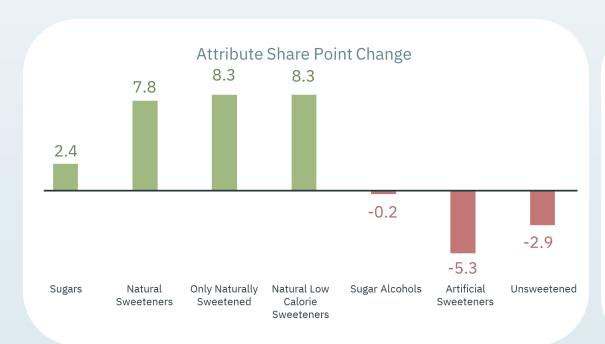
of American adults follow a specific diet

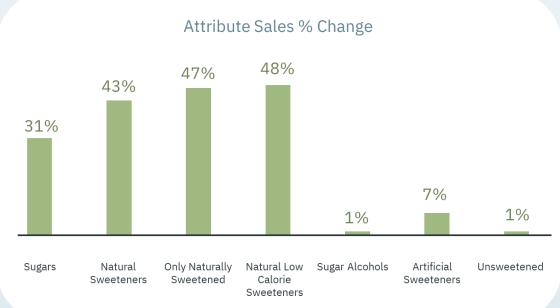
58%

of Americans millennials follow a specific diet

Natural Sweeteners Winning in Performance Nutrition

Artificially Sweetened items are not able to compete with items sweetened by Natural Sweeteners, Natural Low-Calorie Sweeteners, and/or Only Naturally Sweeteners.





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

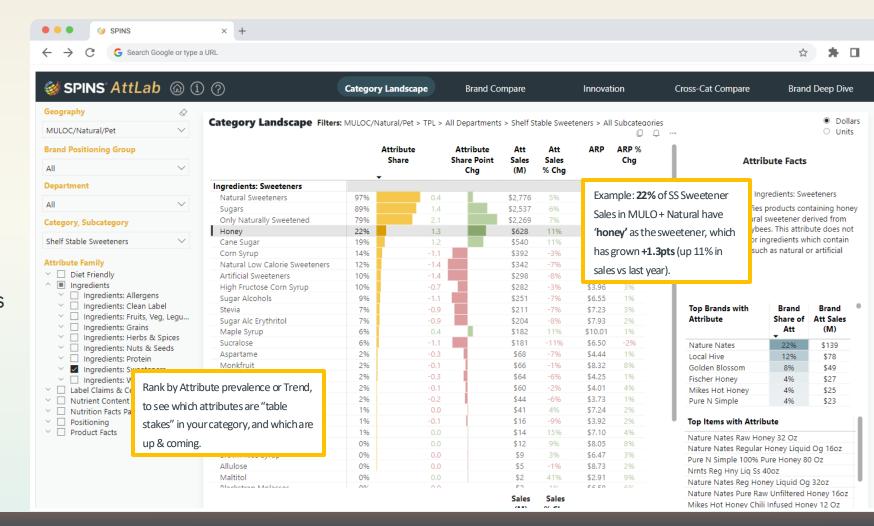
SPINS Ingredient – Sweeteners Coding (Attribute Values, 38)

Artificial & Controversial	Natural Sv	Sugar Alcohols	
INGREDIENT - ACESULFAME K	INGREDIENT - AGAVE NECTAR	INGREDIENT - HONEY	INGREDIENT - HYDROGENATED STARCH HYDROLYSATE
INGREDIENT - ARTIFICIAL SWEETENERS	INGREDIENT - ALLULOSE	INGREDIENT - LUCUMA SWEETENER	INGREDIENT - ISOMALT
INGREDIENT - ASPARTAME	INGREDIENT - BLACKSTRAP MOLASSES	INGREDIENT - MAPLE SYRUP	INGREDIENT - LACTITOL
INGREDIENT - CORN SYRUP	INGREDIENT - BROWN RICE SYRUP	INGREDIENT - MONKFRUIT	INGREDIENT - MALTITOL
INGREDIENT - HIGH FRUCTOSE CORN SYRUP	INGREDIENT - CANE SUGAR	INGREDIENT - NATURAL LOW CALORIE SWEETENERS	INGREDIENT - SUGAR ALC ERYTHRITOL
INGREDIENT - NEOTAME	INGREDIENT - CHICORY	INGREDIENT - NATURAL SWEETENERS	INGREDIENT - SUGAR ALC MANNITOL
INGREDIENT - SACCAHRIN	INGREDIENT - COCONUT SUGAR	INGREDIENT - ONLY NATURALLY SWEETENED	INGREDIENT - SUGAR ALC SORBITOL
INGREDIENT - SUCRALOSE	INGREDIENT - DATE SUGAR	INGREDIENT - SORGHUM SYRUP	INGREDIENT - SUGAR ALC XYLITOL
INGREDIENT - SUGARS	INGREDIENT - FRUIT JUICE CONCENTRATE	INGREDIENT - STEVIA	INGREDIENT - SUGAR ALCOHOLS
INGREDIENT - UNSWEETENED		INGREDIENT - YACON SWEETENER	



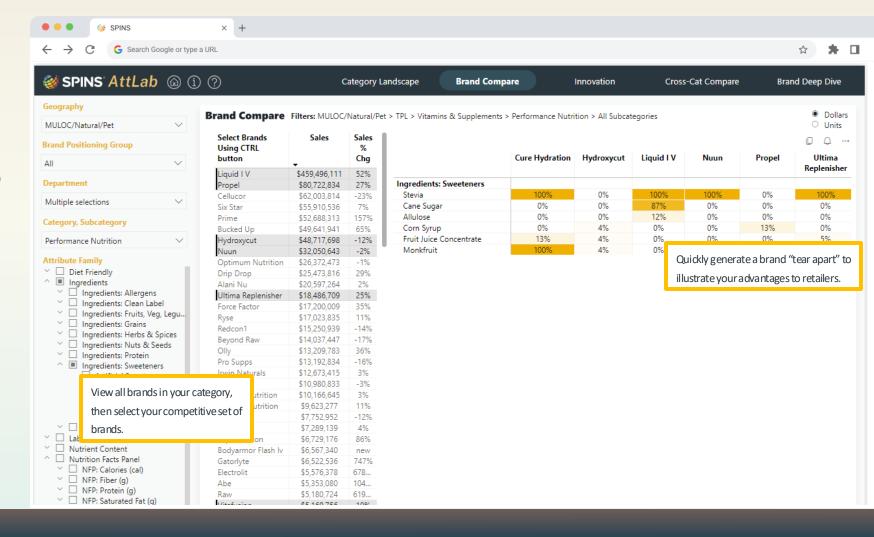
Identify which attributes are most valuable to consumers and are brand differentiators, to optimize your marketing.

Plus, demonstrate your datadriven expertise on the category's attribute trends and your brand advantages in your retailer sellstories.



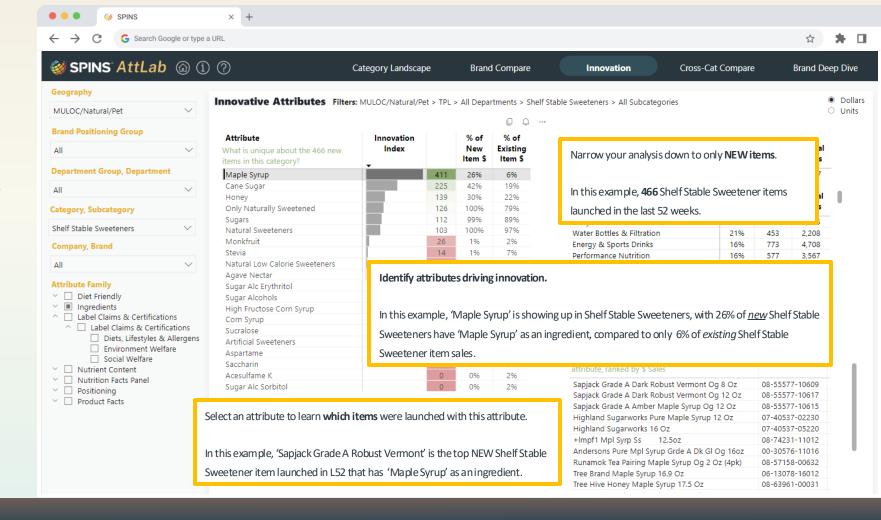


With Brand Compare, benchmark your brand vs. key competitors to identify product advantages and gaps.



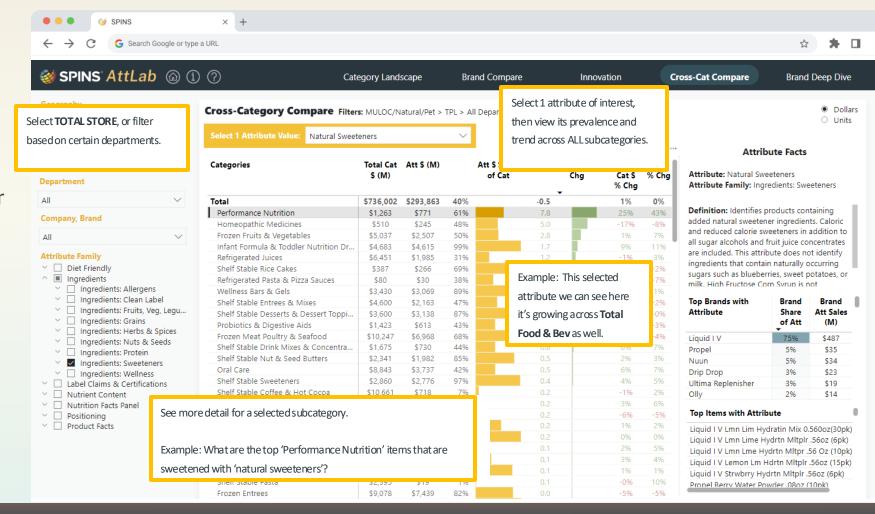


Each month, identify which attributes are driving the latest product launches, to inform your innovation pipeline and stay ahead of the competition.



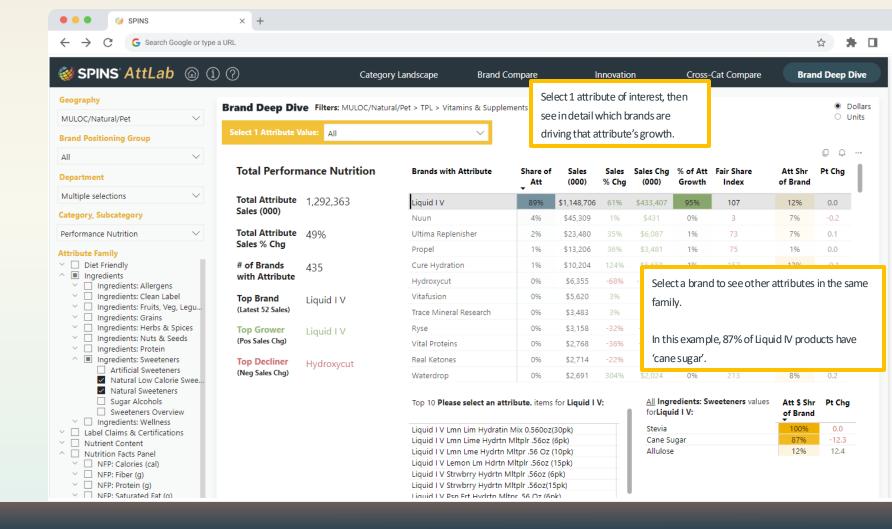


Monitor attribute trends growth across **total store**, to identify your brand's top opportunities for adjacent category expansion.

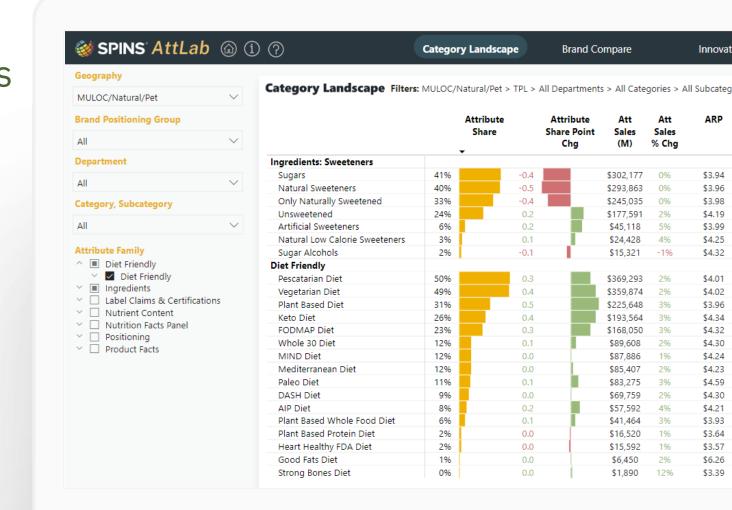




Dive even further into one specific attribute, to see which brands are the top players, and which brands are driving the attributes growth.



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.



Thank you!

For more information contact Jessica at jherzog@spins.com



Appendix



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

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)

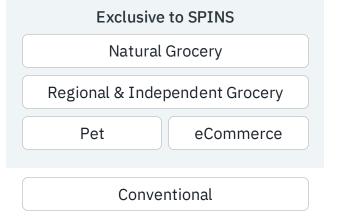
- Data Extraction
- Data Harmonization
- Data Visualization
- Integration with 3rd-Party BI Tools

The **SPINS Advantage**



Retail Coverage

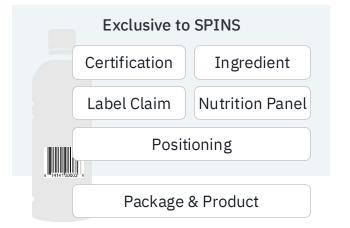
SPINS offers the **most complete market view** across the full retail landscape





Product Intelligence

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





Applications & Insights

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

Business Intelligence

Data Harmonization

Trade Promotion Tools

Growth Consulting

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







NATURAL CHANNEL

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







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







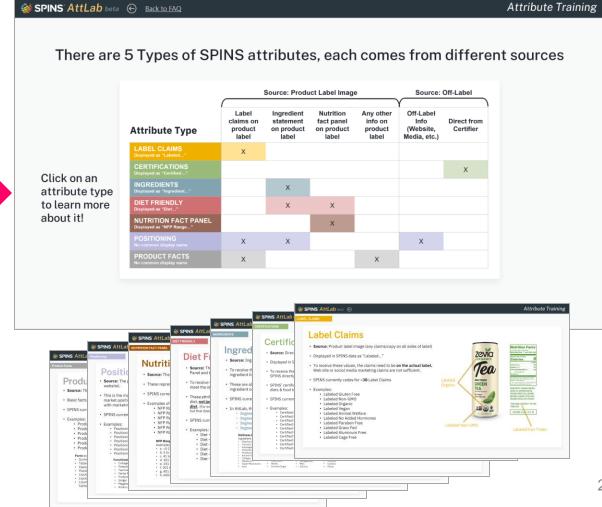
SPINS AttLab Overview

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.

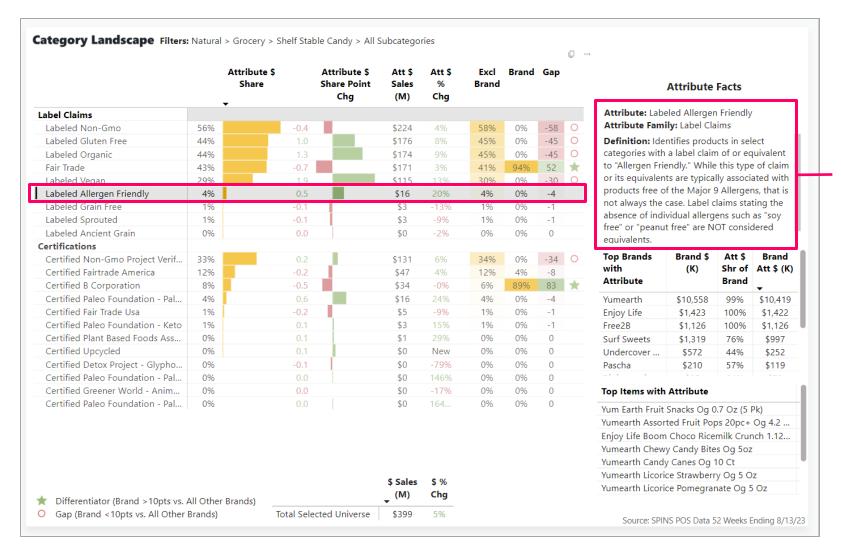
Click here to learn about **SPINS Attribute Types**





SPINS Attl ab Overview

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



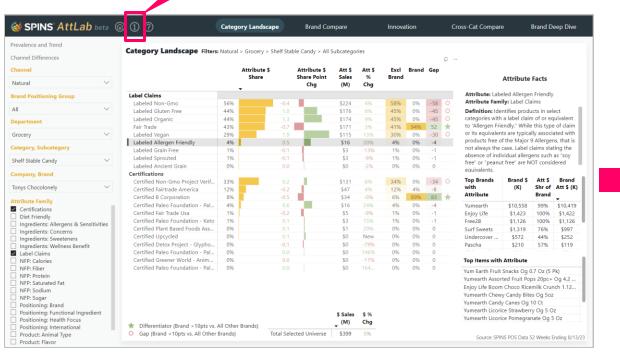
SPINS PI definitions are built in.

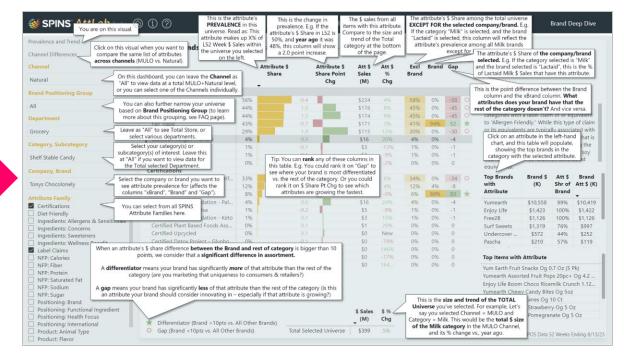
so that users can click on an attribute to see how we define it, as well as top brands and items with that attribute.

SPINS AttLab Overview

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

The 'info' button on each dashboard opens an overlay that explains every metric and item on the page. This gives the user the autonomy to learn within the tool as they are using it.

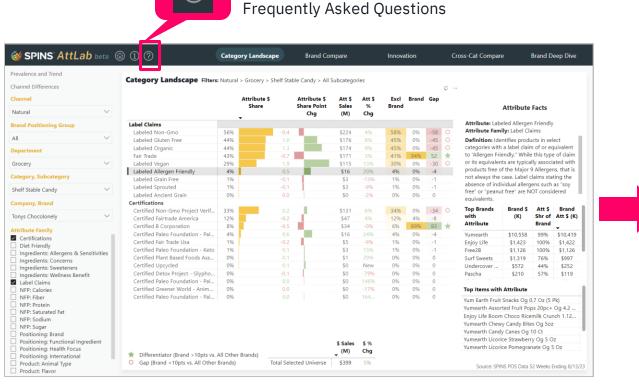




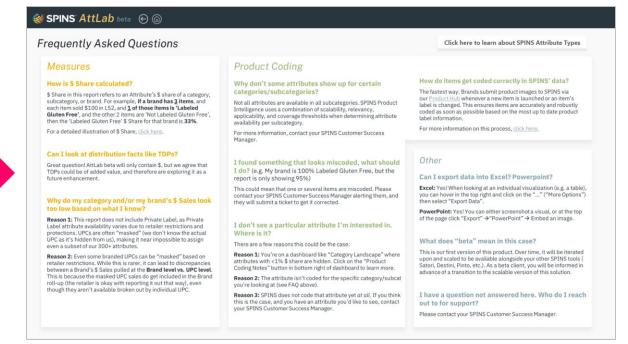
User can click anywhere to close info pane.

SPINS Attl ab Overview

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



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

Sweeteners Across The Entire Store

