



Unwrapping the Latest in Sustainable Packaging



Presented by

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Account Manager,
Channel Partners
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

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

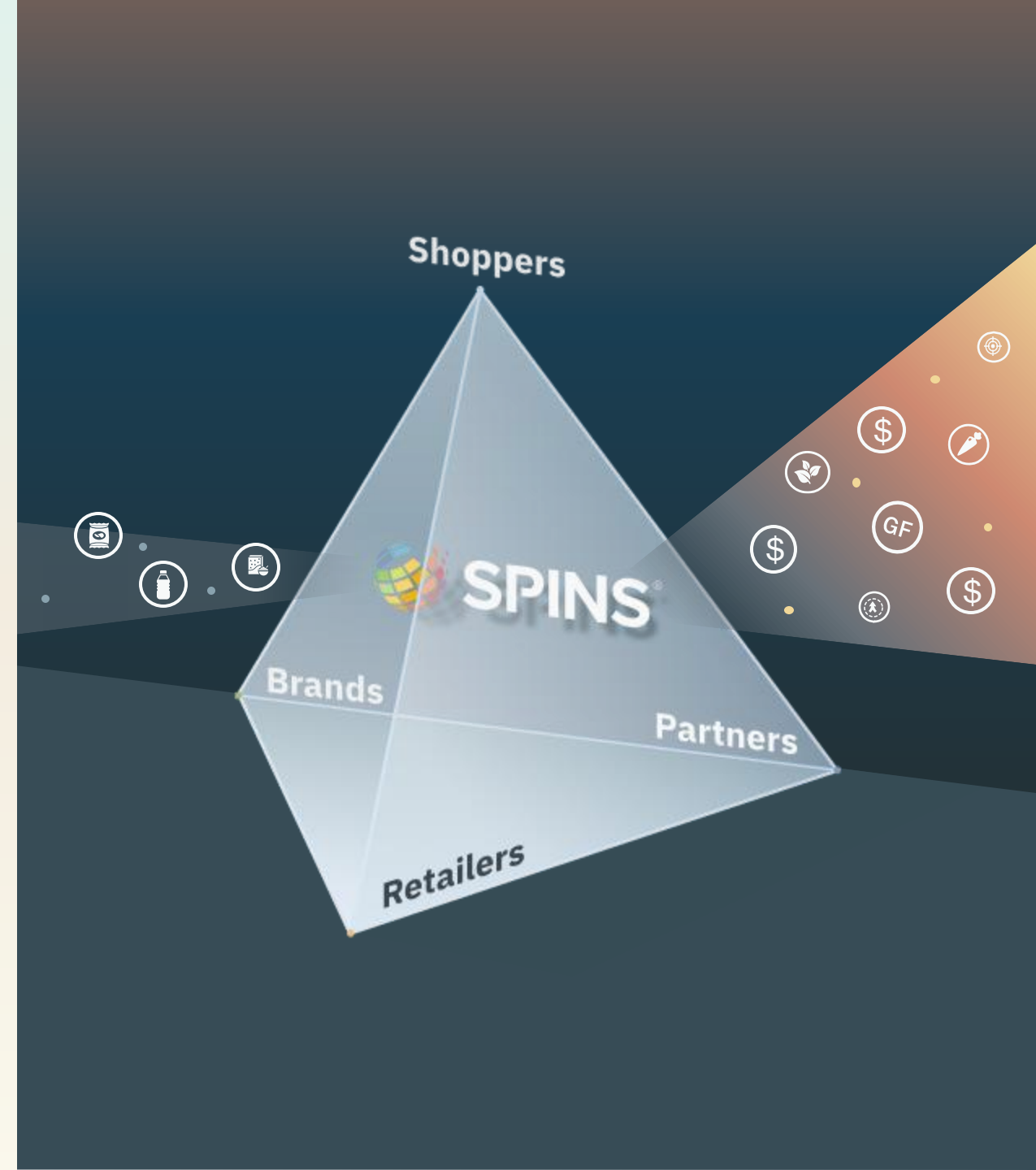
(excluding brands & retailers)



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 Expansive Network

PROPRIETARY RETAIL CHANNELS AND PARTNERSHIPS

Proprietary to SPINS					Brand-Market Fit
Regional & Independent Grocery					90+
Natural Grocery					135+
Vitamins & Supplements					6+
eCommerce					7+
SPINS Pet Channel					
Pet					20+
In partnership with IRI					
Conventional					84+

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

Sendik's
FOOD MARKET

CONVENTIONAL MULO

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

Kroger



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*

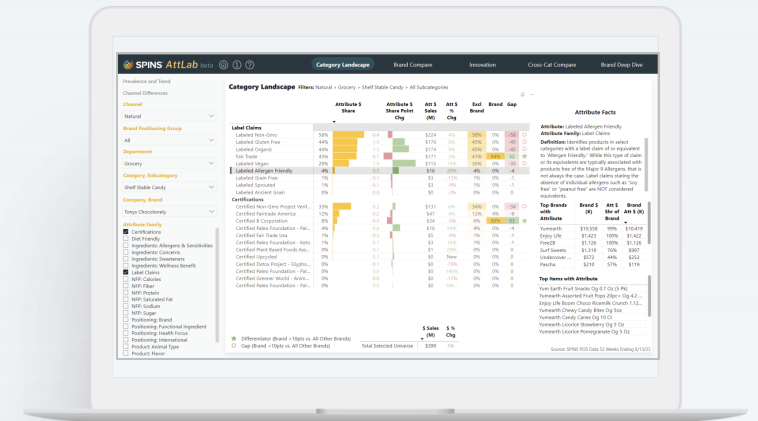
Lifestyle, Diets & Tribes

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

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

BRANDS

OLIPOP

RYSE

PEPSICO

+ MORE

LIQUID DEATH

suja
ORGANIC

INVESTMENT & VC

INGREDIENT SUPPLIERS

RETAILERS

SPROUTS
FARMERS MARKET

GROCERYOUTLET
Bargain Market

Kroger

+ MORE

amazon

THE
FRESH
MARKET

MISSION-ALIGNED PARTNERS

New Hope.
NETWORK.

Naturally
NETWORK

nga
NATIONAL
GROCERS
ASSOCIATION

PLANT
BASED
WORLD

MEDIA & TECHNOLOGY

C A FORTUNE
the consumer brands agency

PRESENCE

KeHE

UNFI
BETTER FOOD. BETTER FUTURE.

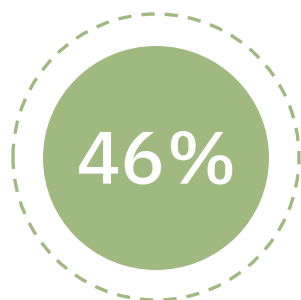
GREEN SPOON
SALES

+ MORE

BROKERS & DISTRIBUTORS

THE LANGUAGE OF
CPG INTELLIGENCE

A gap often exists between **what matters to consumers**
and **what we actually see in retail sales**



Of total consumers say
**sustainable product
certifications** (like UDSA Organic
or Non-GMO) influence their
purchase habits

% of Total Food & Beverage
retail sales that come from:

*Products
Certified
Non-GMO*



*Products
Labeled
Organic*



*Fair
Trade
Products*



Source: SPINS' Values Oriented Shopper Survey, fielded Mar 2023. *N = 401 "For each of the product and packaging characteristics, please rate the level of importance to you when shopping for groceries."

Why don't shoppers always reflect their stated values in what they buy?

Several Barriers Exist to Sustainable Shopping



Availability

Sustainable options may not be widely distributed or as prominent in channels where you shop



Price

Sustainable products can come with a price premium that is not accessible for every shopper



Quality & Efficacy

Sustainable alternatives are sometimes falsely perceived as less effective, e.g., bar shampoo vs liquid



Durability & Ease

As seen with paper straws, eco-friendly packaging can be fragile or more complicated for everyday use



Familiarity

Higher brand awareness among conventional brands AND lack of education (what IS sustainable?)

Moral of the story: It isn't necessarily the consumer's fault!
We are often limited by tight wallets or a lack of viable options

Yeah, but can't plastic be recycled?

Among **US Containers & Packaging...**

81% of paper is recycled

35% of aluminum is recycled

31% of glass is recycled

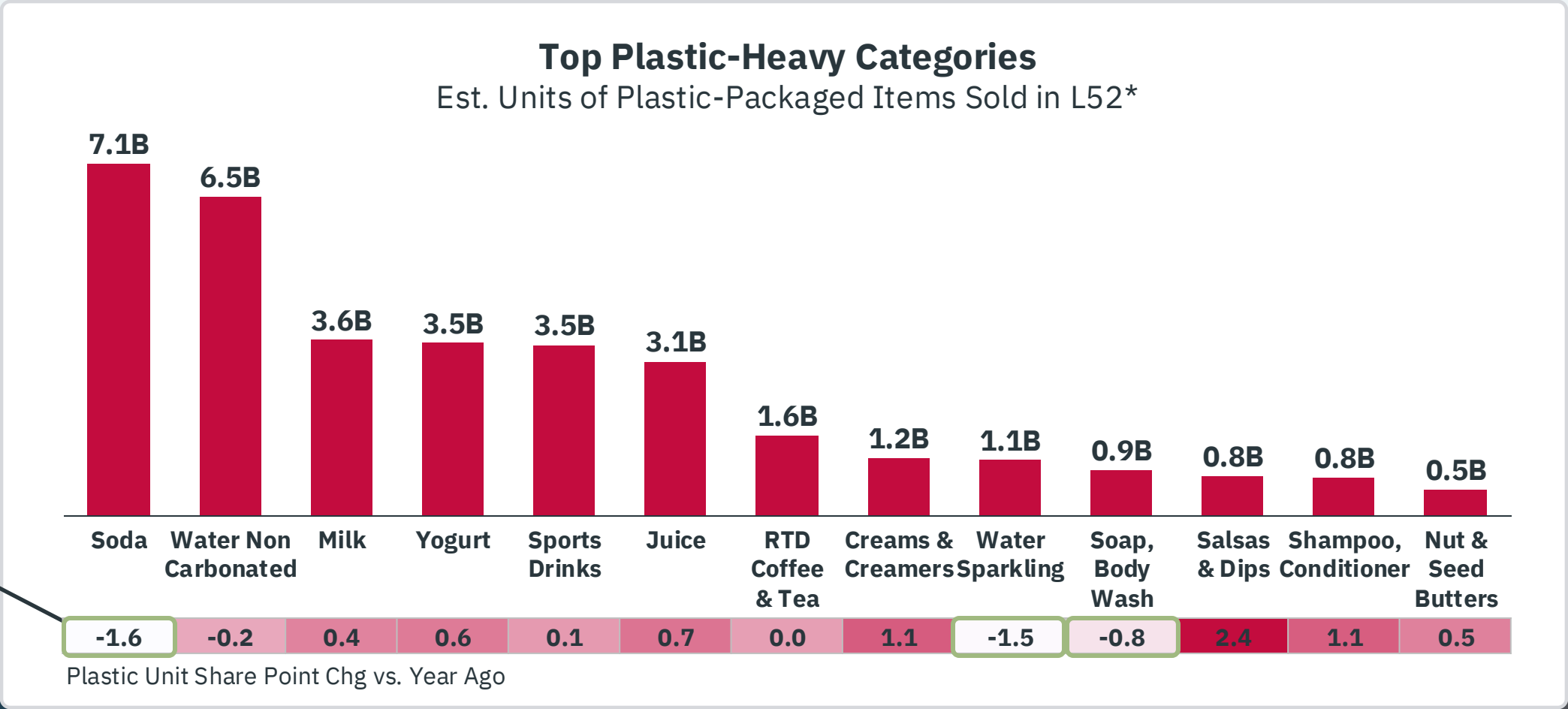
14% of plastic is recycled

Out of **82 million** tons of containers & packaging
municipal solid waste, **30 million tons go to a landfill**
44 million tons recycled, 7.4 million tons combusted for energy recovery

Source: The US EPA: <https://www.epa.gov/facts-and-figures-about-materials-waste-and-recycling/containers-and-packaging-product-specific>
Based on the weight of municipal solid waste (MSW) that was recycled as a percent of the weight generated in 2018.

Soda and Water are Top Plastic Offenders in Retail

Although soda still sells the most plastic units, it has also seen the largest **shift away from plastic**.

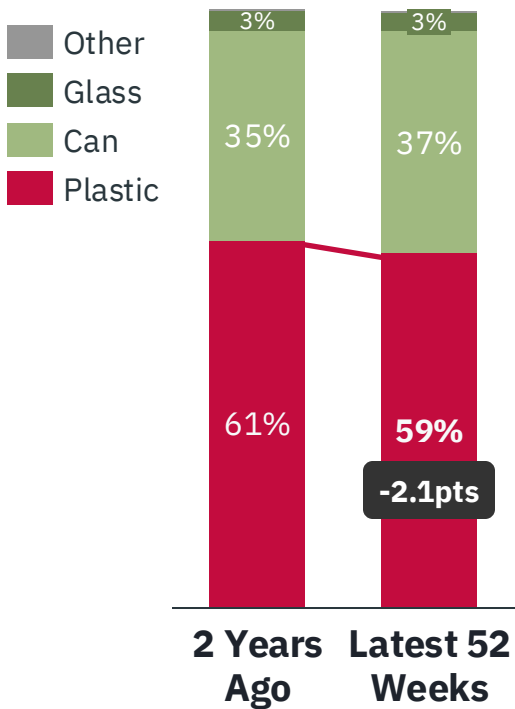


*Plastic packaging as a % of **branded** units is applied to the total category (this assumes that the same % of Private Label units are plastic).
Examples of large categories where packaging type is **not available**: Bread & Baked Goods, Candy, Produce, Cheese, Cookies/Snack Bars, Condiments

What's driving the change in Soda?

Did you know: If the top 3 soda brands went **100% can** in retail, that'd be **25 million less plastic bottles** sold per DAY

% of Soda Units



Note: Packaging type as a % of **branded** units is applied to the total category (assumes Pvt Lbl has same split of packaging type).



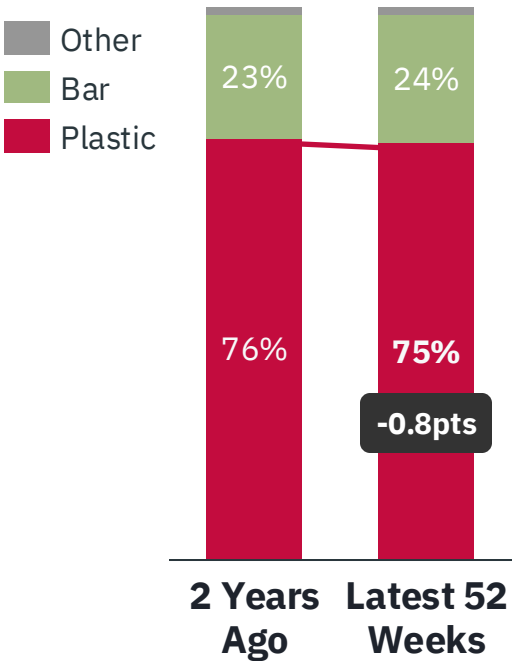
These **100% canned** brands have taken **over 1 full share point** of the \$30B+ Soda market!



PLUS...While these brands on average are still 41% plastic, that's **down -0.5pts**, which equates to a **\$94 million** shift away from plastic.

What's driving the change in Soap & Body Wash?

% of Soap & Body Wash Units



Note: Packaging type as a % of **branded** units is applied to the total category (assumes Pvt Lbl has same split of packaging type).



Bar soaps have gained 1 share point over past 2 years, despite a decrease in the total number of brands. **Naturally positioned brands are responsible for >80% of the positive growth!**

While plastic packaging remains prevalent in liquid soap & body wash, innovative sustainable alternatives are emerging as strong competitors; **3 out of the 5 leading new items in the Natural Channel have opted out of plastic packaging!**



Legacy and Emergent Brands Play Their Own Role In Plastic Reduction

CPG Giants' Commit to Plastic Reduction or Recycling Friendly Products, while Emergent Brands Go Plastic Free

Major Brands

Beverage



"Coca Cola's new lightweighting project reduces the weight of 12, 16.9, and 20oz PET bottles from **21 to 18.5g (12% plastic reduction)**"

Emergent Brands



"Liquid's Death aluminum cans are coined **"infinitely recyclable"** and therefore more eco-friendly than single use plastic bottles"

Hair Care



"By 2025, **50%** of plastics used in L'Oreal's packaging will either be from **recycled or bio-based sources**"



"**98%** of Kitsch products come in **paper packaging**, and **waterless** hair care products **reduce CO2 emissions** during shipping"

Laundry



"Tide detergent bottles are **100% recyclable** and contain at least **25% post-consumer recycled plastic**"



"Tru Earth's Eco-Strips **save water** and reduce plastic waste with **recyclable cardboard packaging**"

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 REGENERATIVE ORGANIC	LABELED FRAGRANCE FREE
CERTIFIED B CORPORATION	CERTIFIED UPCYCLED	LABELED FREE RANGE
CERTIFIED DETOX PROJECT - GLYPHOSATE RESIDUE FREE	CERTIFIED WHOLE GRAINS COUNCIL	LABELED GLUTEN FREE
CERTIFIED FAIR TRADE USA	LABELED ALCOHOL FREE	LABELED GRAIN FREE
CERTIFIED FAIRTRADE AMERICA	LABELED ALLERGEN FRIENDLY	LABELED GRASS FED
CERTIFIED GREENER WORLD - ANIMAL WELFARE	LABELED ALUMINUM CHLOROHYDRATE FREE	LABELED NITRATE FREE
CERTIFIED GREENER WORLD - GRASSFED	LABELED ALUMINUM FREE	LABELED NO ADDED HORMONES
CERTIFIED GREENER WORLD - NON GMO	LABELED ANCIENT GRAIN	LABELED NON-GMO
CERTIFIED MARINE STEWARDSHIP COUNCIL	LABELED ANIMAL WELFARE	LABELED ORGANIC
CERTIFIED NON-GMO PROJECT VERIFIED	LABELED ANTI AGING	LABELED PARABEN FREE
CERTIFIED PALEO FOUNDATION - GRAIN FREE	LABELED ANTIBIOTIC FREE	LABELED PASTURE RAISED
CERTIFIED PALEO FOUNDATION - KETO	LABELED ANTIOXIDANT	LABELED PROPYLENE GLYCOL FREE
CERTIFIED PALEO FOUNDATION - PALEO	LABELED CAGE FREE	LABELED SODIUM LAURYL SULFATE FREE
CERTIFIED PALEO FOUNDATION - PALEO FRIENDLY	LABELED CORAL REEF SAFE	LABELED SPROUTED
CERTIFIED PALEO FOUNDATION - PALEO VEGAN	LABELED FAT	LABELED UNSCENTED
CERTIFIED PLANT BASED FOODS ASSOCIATION	LABELED FLUORIDE FREE	LABELED VEGAN

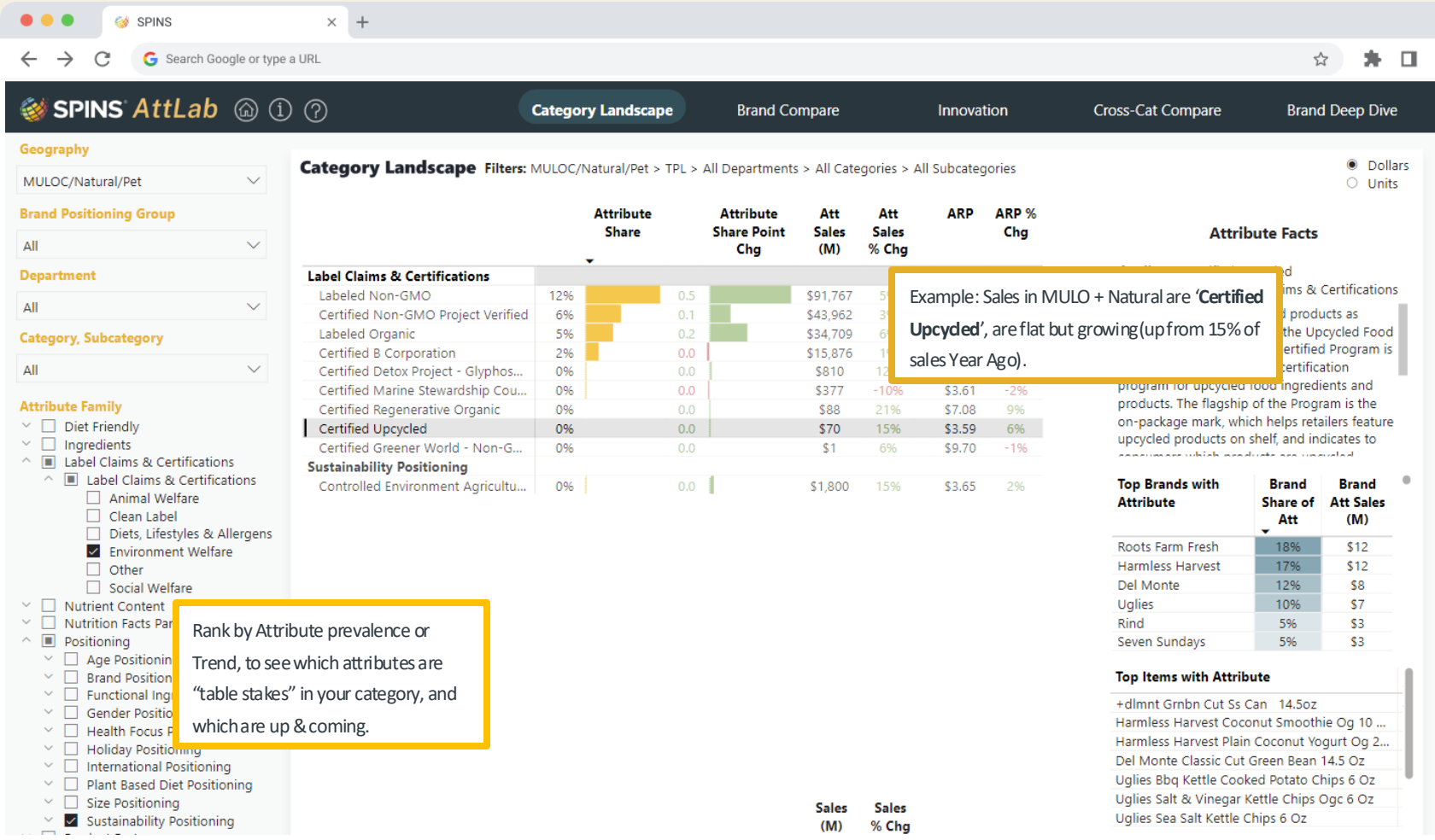


Product Intelligence – SPINS AttLab



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

All

Category, Subcategory

Shelf Stable Fruit Spreads & Jams &...

Attribute Family

☐ Diet Friendly

☐ Ingredients

☒ Label Claims & Certifications

- ☐ Label Claims & Certifications
 - ☐ Diets, Lifestyles & Allerge...
 - ☒ Environment Welfare
 - ☐ Social Welfare
- ☐ Nutrient Content
- ☐ Nutrition Facts Panel

☒ Positioning

- ☐ Branding
- ☐ Packaging
- ☐ Pricing
- ☒ Sales
- ☐ Promotion

☐ Product

Brand Compare

Filters: MULOC > TPL > All Departments > Shelf Stable Fruit Spreads & Jams & Jellies > All Subcategories

Select Brands Using CTRL button

	Sales	Sales % Chg
Smuckers	\$498,916,545	-1%
Bonne Maman	\$193,353,505	8%
Welchs	\$168,332,703	-4%
Polaner	\$32,403,156	4%
Crofters	\$27,500,210	9%
Dalmatia	\$23,804,227	11%
Smuckers Natural	\$23,541,799	-7%
St Dalfour	\$17,286,182	30%
Stonewall Kitchen	\$13,306,064	11%
Divina	\$9,669,794	0%
Musselmans	\$7,066,745	1%
Blackburns	\$6,459,752	-14%
Good Good	\$5,737,421	-0%
Skinny Girl	\$3,594,334	9%
Trappist	\$3,035,913	0%
Tiptree	\$2,947,221	-6%
Goya	\$2,921,018	3%
Chia Smash	\$2,908,929	175%
Braswells	\$2,636,212	22%
Wieser	\$2,416,505	-6%
Wieser	\$2,073,854	70%
Wieser	\$2,034,210	5%
Wieser	\$1,955,117	-8%
Wieser	\$1,861,311	-10%
Wieser	\$1,788,100	478...
Hero	\$1,764,311	-25%
Murrays Cheese	\$1,708,591	-23%
Iberia	\$1,549,014	28%
Darbo	\$1,508,669	-8%
Melindas	\$1,422,770	475...

Label Claims & Certifications

	Bonne Maman	Chia Smash	Dalmatia	Stonewall Kitchen
Labeled Non-GMO	96%	100%	94%	80%
Certified Non-GMO Project Verified	93%	100%	94%	52%
Certified Upcycled	0%	90%	0%	0%
Labeled Organic	0%	0%	4%	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**.

Geography

MULOC/Natural/Pet

Brand Positioning Group

All

Department Group, Department

All

Category, Subcategory

Shelf Stable Fruit Spreads & Jams &...

Company, Brand

All

Attribute Family

☐ Diet Friendly

☐ Ingredients

☒ Label Claims & Certifications

- ☐ Label Claims & Certifications
 - ☐ Diets, Lifestyles & Allergens
 - ☒ Environment Welfare
 - ☐ Social Welfare

☐ Nutrient Content

☐ Nutrition Facts Panel

☒ Positioning

☐ Product Facts

Innovative Attributes

Filters: MULOC/Natural/Pet > TPL > All Departments > Shelf Stable Fruit Spreads & Jams & Jellies > All Subcategories

Attribute	Innovation Index	% of New Item \$	% of Existing Item \$
What is unique about the 353 new items in this category?			
Certified Upcycled	1099	3%	0%
Labeled Non-GMO	114	43%	38%
Labeled Organic	40	1%	3%
Certified Non-GMO Project Verified	18	6%	35%

Narrow your analysis down to only **NEW** items.

In this example, **353** SS Fruit Spreads & Jams & Jellies items launched in the last 52 weeks.

			# Total Items
Hair Care	10%	4,696	45,240
Sun & Insect Protection	10%	438	4,228
Skin Care	10%	827	7,992
Kombucha & Other Functional Beverages	10%	384	3,715

Identify attributes driving innovation.

In this example, Certified Upcycled is showing up in SS Fruit Spreads & Jams & Jellies, with **3%** of *new* SS Fruit Spreads & Jams & Jellies that are Certified Upcycled, compared to only **0%** of *existing* SS Fruit Spreads & Jams & Jellies item sales.

Select an attribute to learn **which items** were launched with this attribute.

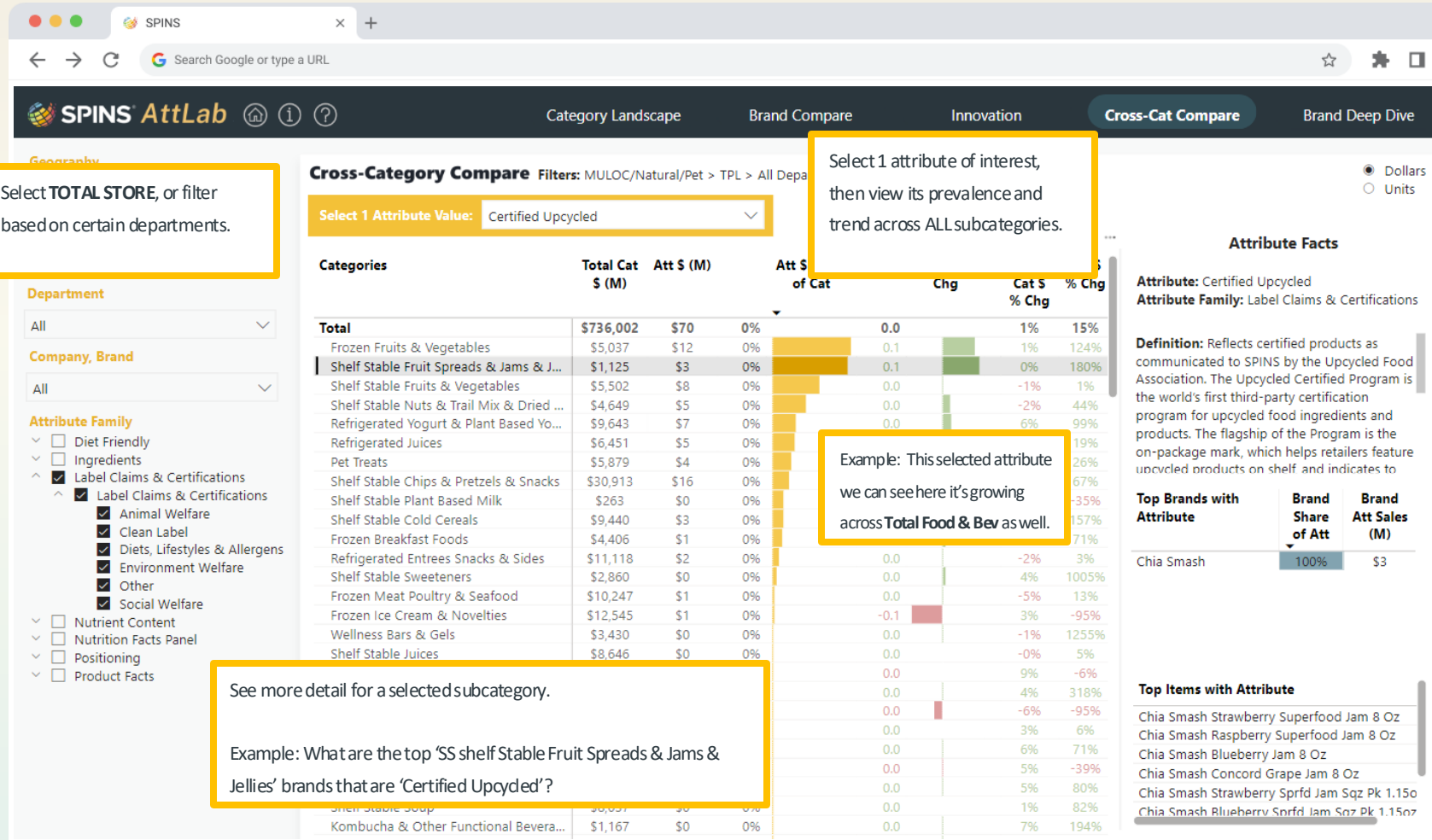
In this example, 'Chia Smash Raspberry Superfood Jam' is the top NEW SS Fruit Spreads & Jams & Jellies item launched in L52 that is 'Certified Upcycled'.

attribute, ranked by \$ Sales	
Chia Smash Raspberry Superfood Jam 1.15 Oz	08-60001-51755
Chia Smash Apricot Superfruit Jam 8 Oz	08-60009-19301
Chia Smash Strawberry Sprfd Jam Sqz Pk 1.15oz	08-60001-51754
Chia Smash Blueberry Sprfd Jam Sqz Pk 1.15oz	08-60001-51753

Product Intelligence – SPINS AttLab



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



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.

Geography

MULOC/Natural/Pet

Brand Positioning Group

All

Department

All

Category, Subcategory

All

Attribute Family

☐ Diet Friendly

☐ Ingredients

☒ Label Claims & Certifications

☒ Label Claims & Certifications

☐ Nutrient Content

☐ Nutrition Facts Panel

☐ Positioning

☐ Product Facts

Brand Deep Dive

Filters: MULOC/Natural/Pet > TPL > All Departments > All Categories

Select 1 Attribute Value:

Certified Upcycled

Certified Upcycled

Total Attribute Sales (000) 69,580

Total Attribute Sales % Chg 15%

of Brands with Attribute 40

Top Brand (Latest 52 Sales) Roots Farm Fresh

Top Grower (Pos Sales Chg) Roots Farm Fresh

Top Decliner (Neg Sales Chg) Dianas Bananas

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
Roots Farm Fresh	18%	\$12,183	124%	\$6,735	27%	154	98%	-1.8
Harmless Harvest	17%	\$11,616	57%	\$4,226	17%	101	12%	2.8
Del Monte	12%	\$8,320	-2%	-\$194	0%	0	1%	0.0
Uglies	10%	\$7,052	34%	\$1,800	7%	71	63%	-14.1
Rind	5%	\$3,420	12%					
Seven Sundays	5%	\$3,197	79%					
Spudsy	5%	\$3,144	43%					
Chia Smash	4%	\$2,625	180%					
Flock	3%	\$2,266	159%					
Prescription Chicken	3%	\$2,255	5%					
Pipcorn	3%	\$2,095	598%					
Sweet Nothings	2%	\$1,477	87%	\$685	3%	129	58%	21.7

Top 10 Certified Upcycled items for Harmless Harvest:

Harmless Harvest Coconut Smoothie Og 10 Oz
Harmless Harvest Plain Coconut Yogurt Og 24oz
Harmless Harvest Plain Coconut Yogr Og 4.4oz
Harmless Harvest Vanilla Coconut Ygrt Og 4.4oz
Harmless Harvest Strawberry Yogurt Og 4.4 Oz
Harmless Harvest Chocolate Cocnt Smth Og 10oz

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

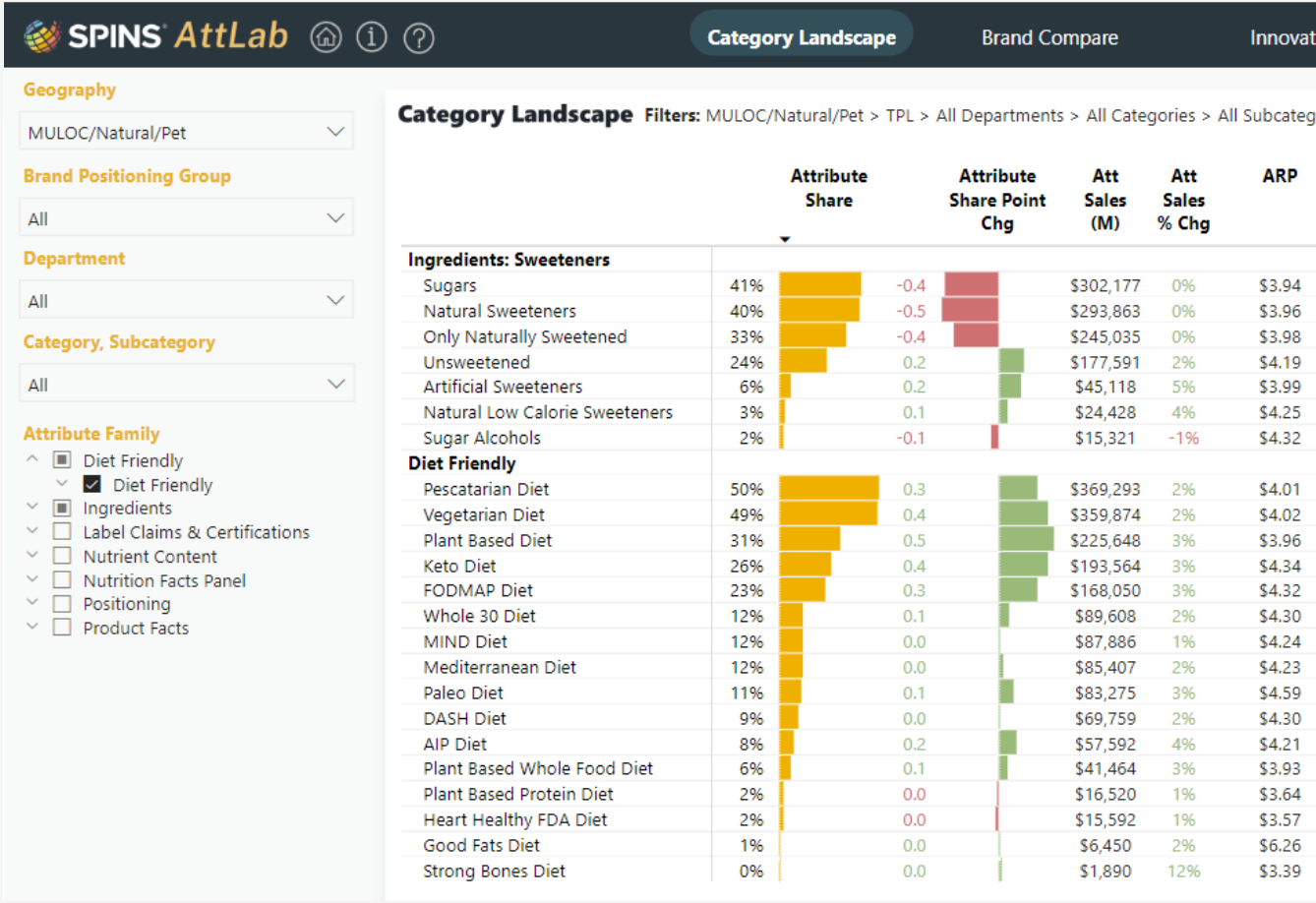
Select a brand to see other attributes in the same family.

In this example, 12% of Harmless Harvest is 'Certified Upcycled'.

All Label Claims & Certifications values for Harmless Harvest:

Label Claim	Att \$ Shr of Brand	Pt Chg
Labeled Fair Trade	13%	3.9
Labeled Organic	13%	3.8
Certified Upcycled	12%	2.8
Labeled Vegan	0%	0.0

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 Lottie at llawlor@spins.com



Appendix

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

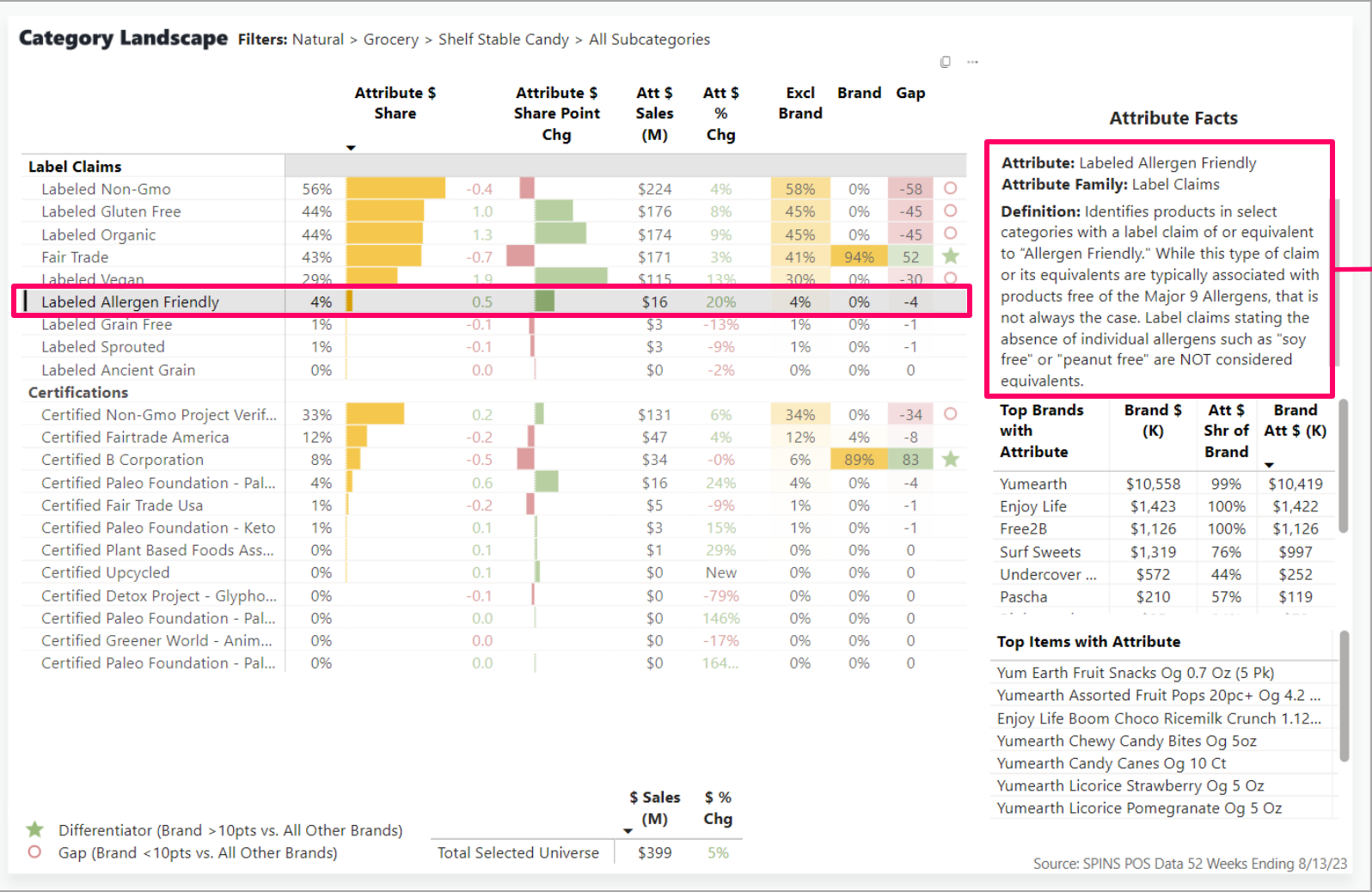
Click here to learn about SPINS Attribute Types

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!

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

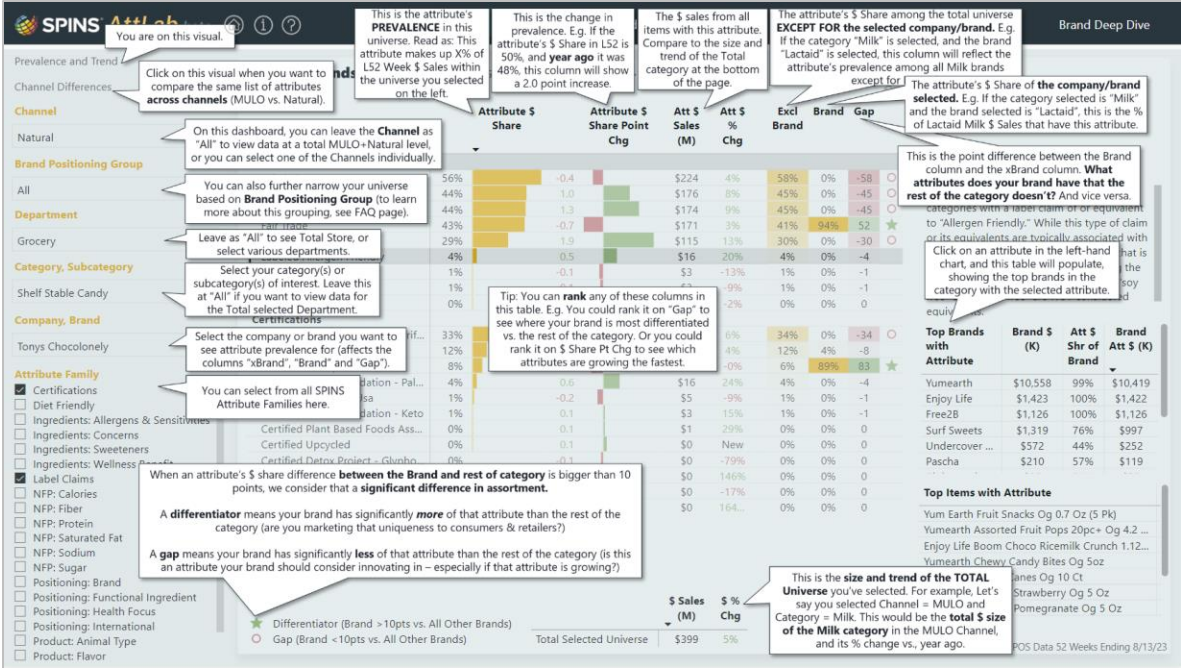
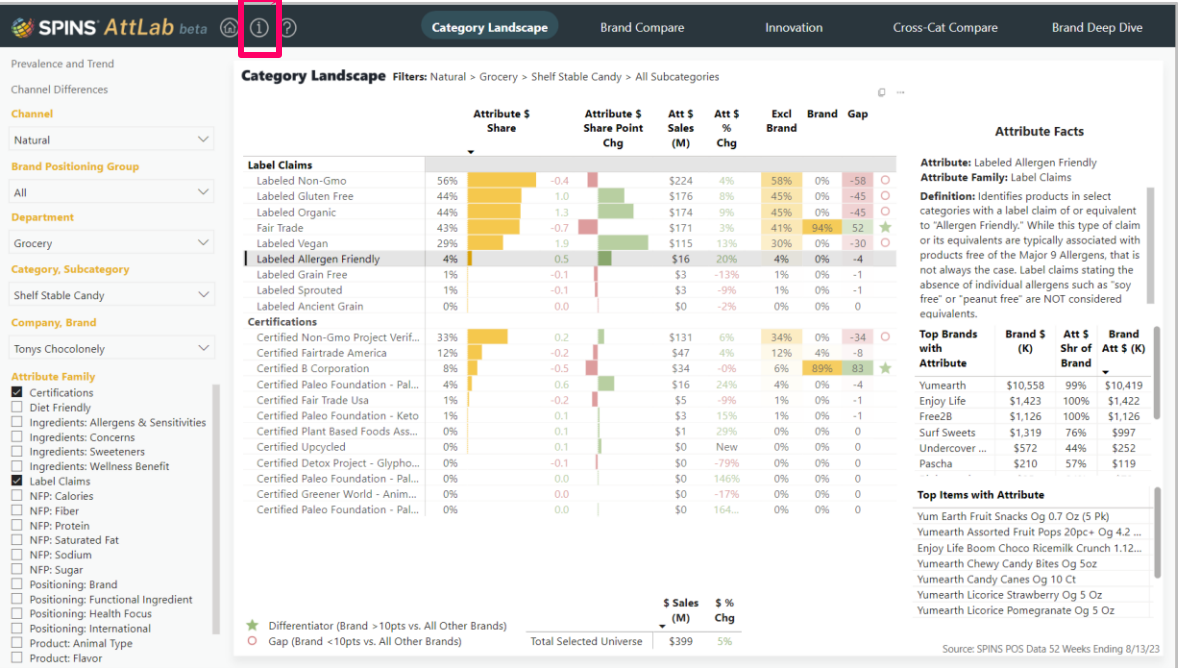


SPINS PI definitions are built in, so that users can click on an attribute to see how we define it, as well as top brands and items with that attribute.

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



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.

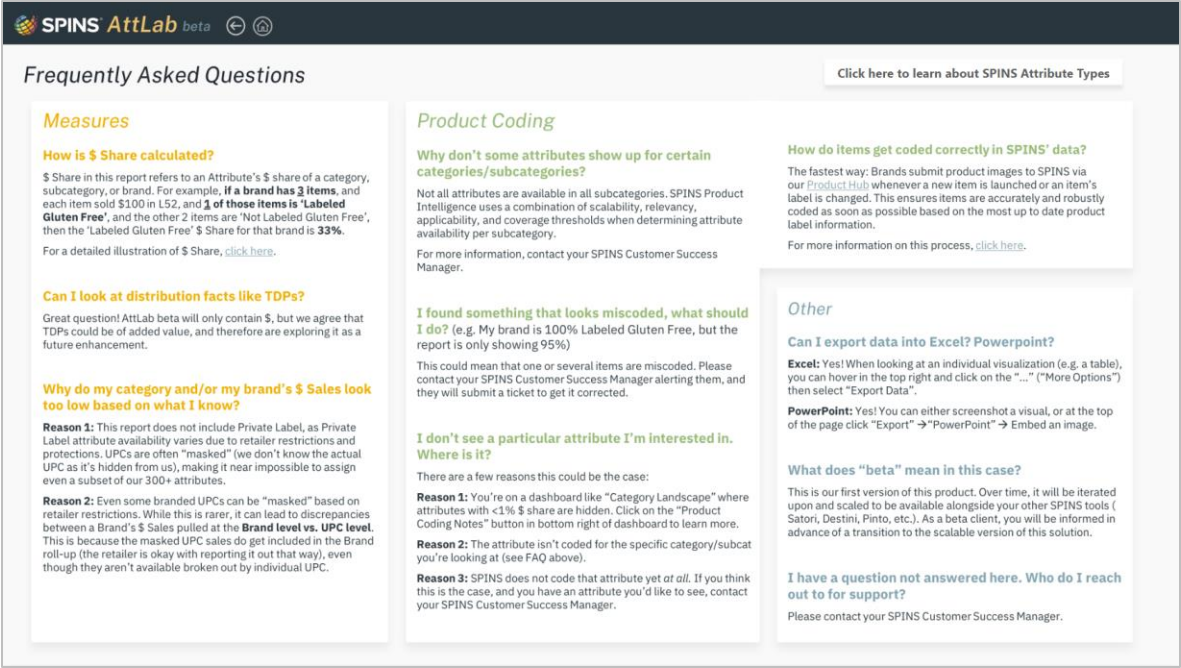
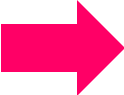
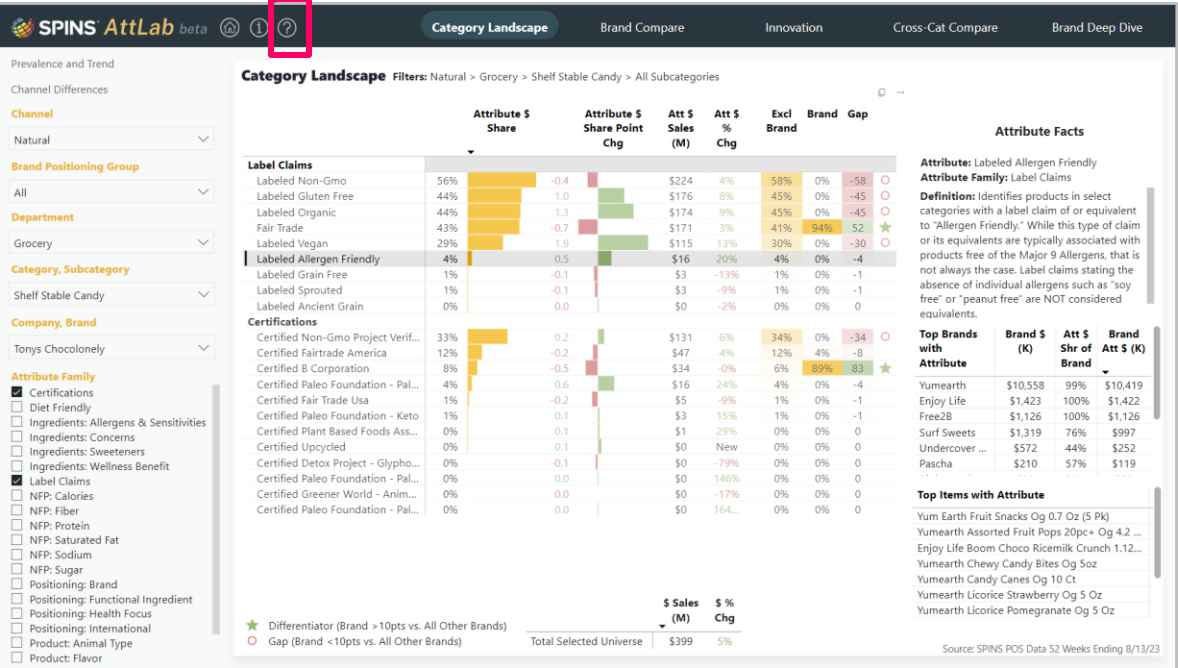


User can click anywhere to close info pane.

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