



# A Thirst For Change:

- **Beverage  
Innovations**



Presented by

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**Brandon Casteel**  
VP Solution Sales  
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**

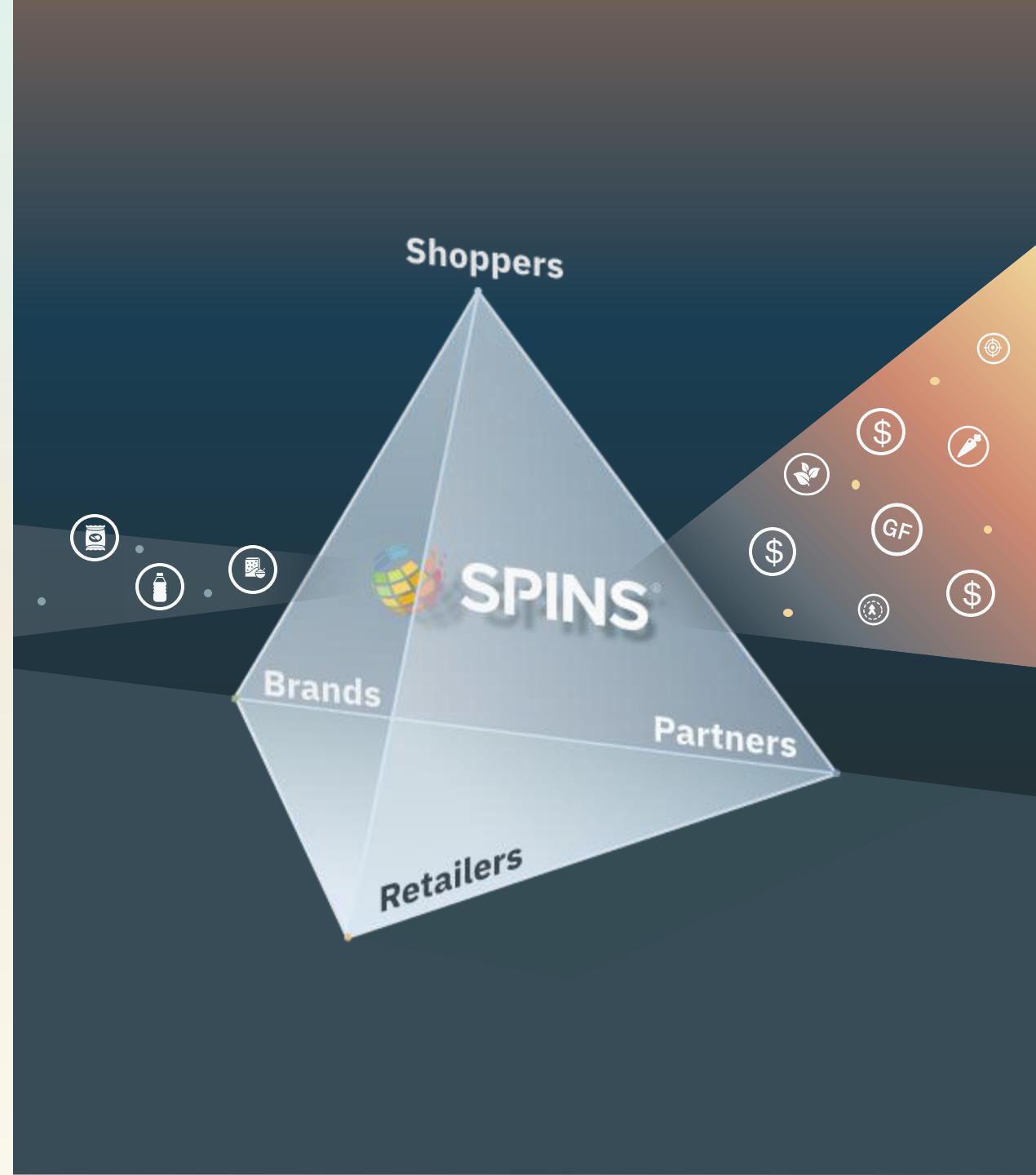
*(excluding brands & retailers)*



## 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

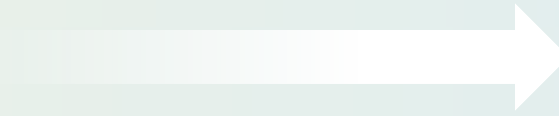
## PROPRIETARY RETAIL CHANNELS AND PARTNERSHIPS

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**



## 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

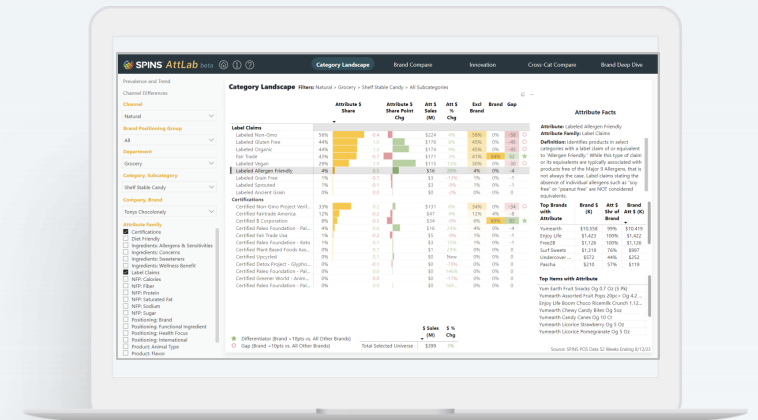
### Lifestyle, Diets & Tribes

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

LIQUID DEATH

suja  
ORGANIC

+ MORE

## INVESTMENT & VC

## INGREDIENT SUPPLIERS

## RETAILERS

SPROUTS  
FARMERS MARKET

GROCERYOUTLET  
Bargain Market

Kroger

amazon

THE FRESH MARKET

+ MORE

THE LANGUAGE OF  
CPG INTELLIGENCE

## 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 SPROUT SALES

+ MORE

## BROKERS & DISTRIBUTORS



# Key Stats to Know the Beverage Landscape

TOTAL STORE INNOVATION RATE

7%

NO. OF BEVERAGE CATEGORIES INNOVATING FASTER THAN TOTAL STORE

8

NUMBER OF BRANDS UNDER \$1M YEAR AGO

6,272

NOW OVER \$1M THIS YEAR

131

HEALTH AND WELLNESS BEVERAGE MARKET SHARE

39%

HEALTH AND WELLNESS TOTAL STORE MARKET SHARE

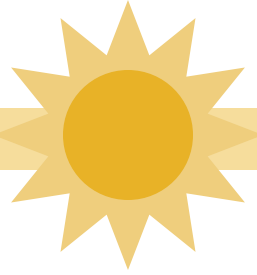








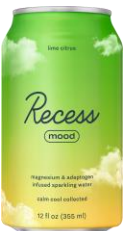

27%

TOP HEALTH FOCUS (% GROWTH)

1. Mood Support
2. Cleanse & Detox
3. Digestive Health
4. Cold & Flu
5. Energy Support



# Beverages play a core part of our everyday routines

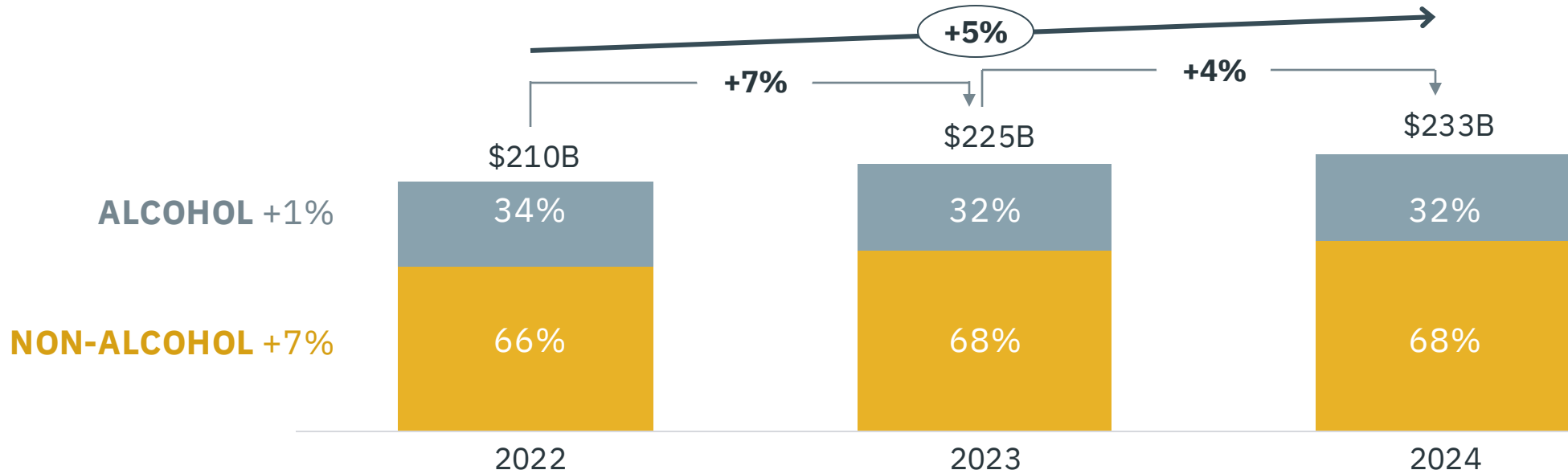
	RISE & SHINE	RELAX & UNWIND
Incumbents	    	
Rising Stars	  	 



# Total Beverage decelerated to +4%

## Non-Alcoholic beverages gain share

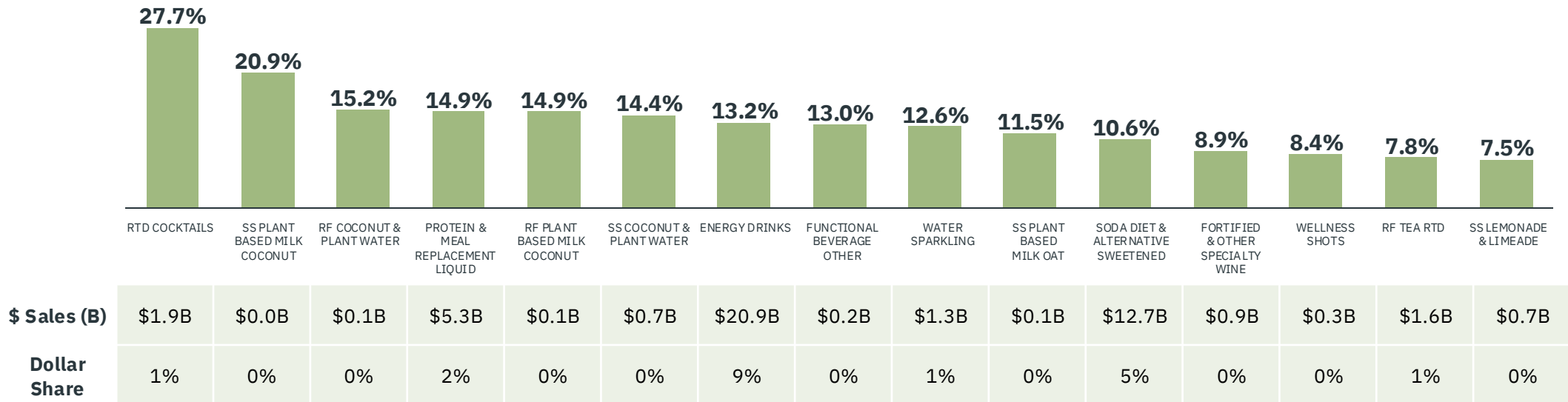
\$ Sales and 2 YR CAGR Total Beverage by Alcohol Content





# RTD Cocktails fastest growing Energy Drinks hold highest share

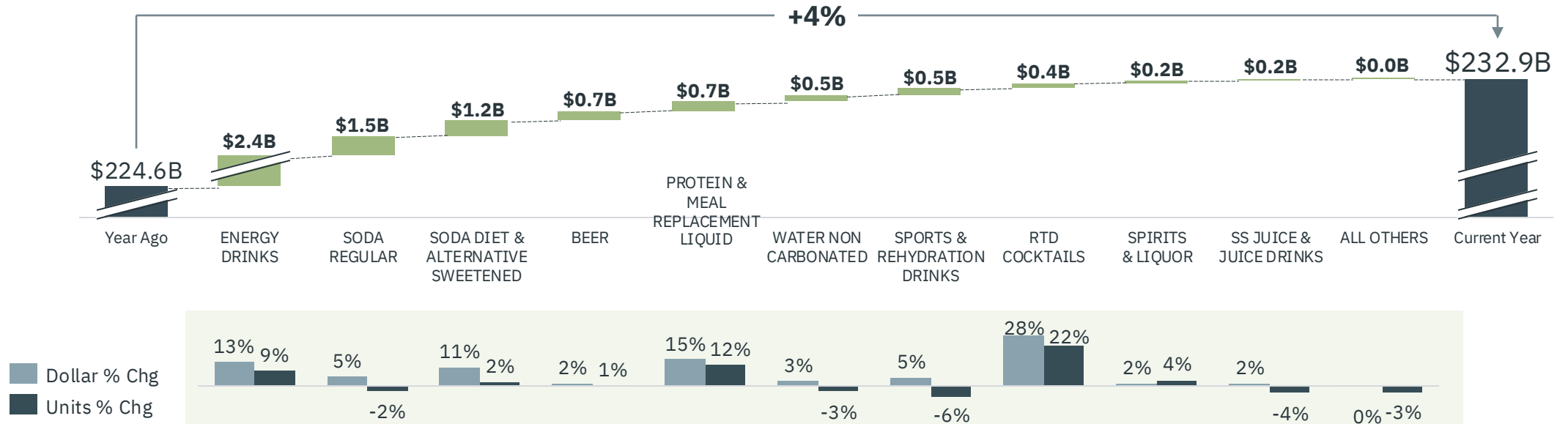
\$ % Change Natural + Mulo/C – Fastest Growing





# Energy Drinks contributing most growth RTD Cocktails gaining most traction

Absolute Dollar Change - Top 10 Growing Total beverage





# Consumer Mentality Shifts accelerating Food & Beverage



## Lifespan to Healthspan

Shifts in daily routines are driving Functional Food & Beverage growth as people find new alternatives to supplements.



## New Global Notions

Consumers are trying new flavors via restaurants and recipes and once it has gained traction, we see these products on retail shelves



## Protecting the Planet

Sustainable sourcing and packaging grow as limiting the negatives align with adding the positives



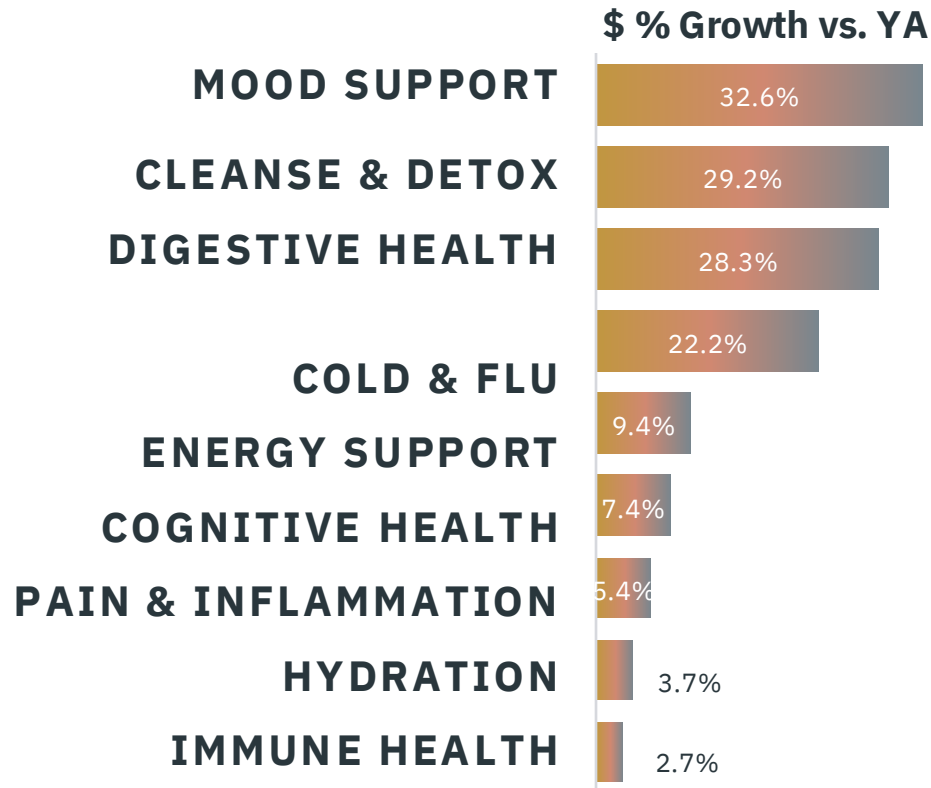
## Intelligent Indulgence

Traditional categories are being reimaged with macro nutrients on the forefront of innovative products





# Health Focus Across Beverage



## Top 5 Digestive Health Ingredients

FUNCTIONAL INGREDIENT	MARKET SHARE
Kombucha	52%
Probiotics	18%
Fiber	17%
Cider Vinegar	13%
Chia	0%

Energy & Hydration: Top 2 Health Focuses for Beverages By \$ Sales



Beverages containing **Fiber** are up **+175%**



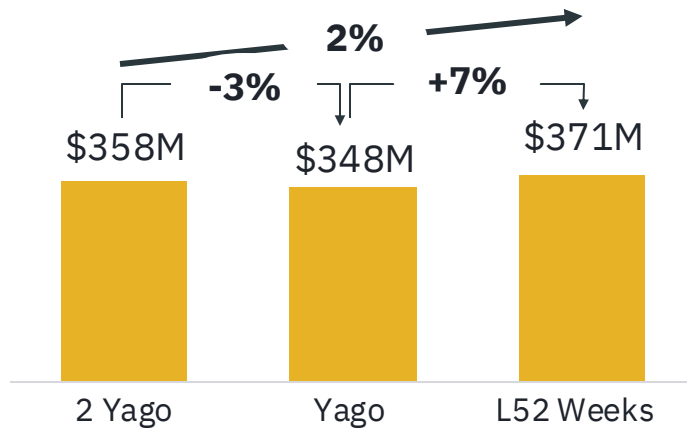
Magnesium ingredients in Beverage are up **+131%**



# Mood Support: Next Functional Beverage Disruption Wave From VMS To Beverage

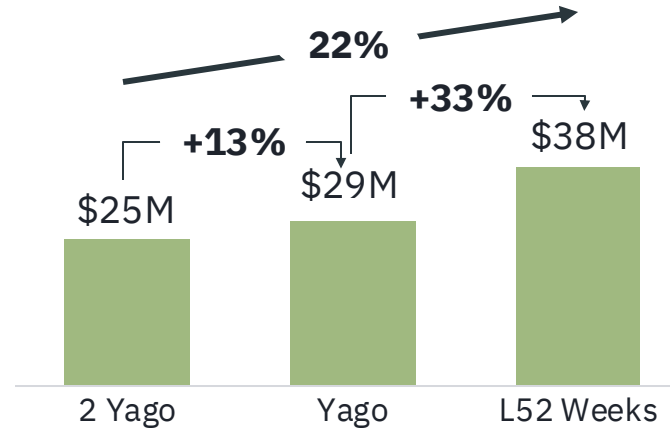
## Mood Support Supplements

Dollar Sales, Total US MULO + C + Natural



## Mood Support Beverages

Dollar Sales, Total US MULO + C + Natural



The **Health Focus** positioning attribute identifies a primary health condition a product is marketed for, based on label claims and intended use. **Mood Support** refers to supplements marketed for anxiety, depression, and stress (excludes sleep).



# Running the Powder to RTD Playbook

In the pre-workout space, we've seen brands go from powder to RTD energy drinks. We're seeing hydration & electrolyte brands slowly do the same, with Prime pulling a reverse trick

## Pre-workout/Energy Drinks



POWDER



RTD



POWDER



RTD

## Hydration



POWDER



RTD



RTD




POWDER



# Beverages are the new mechanism of action.

Functional ingredients are being added to relieve anxiety, support mindfulness and create alcohol alternatives for social connectivity.



## The Hottest Beer in America Doesn't Have Alcohol


Founded by a hedge-fund trader and a brewer, Athletic Brewing has become the king of nonalcoholic beers. So what's all the buzz about?

**THE WALL STREET JOURNAL**

<p><b>+24%</b> Non-Alcoholic Beer</p>	<p><b>+1%</b> Total Beer Category</p>
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## Cannabis Drinks Hit Total Wine

By Hilary Bricken on November 6, 2023  
POSTED IN GENERAL INDUSTRY



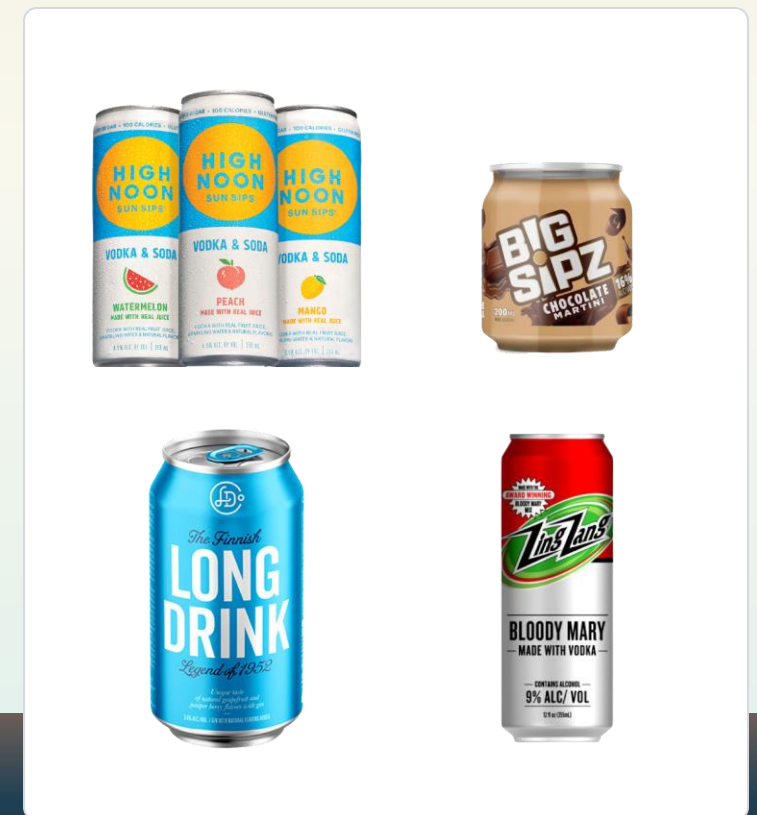
<p><b>+690%</b> THC, (Hemp derived-Delta 8)</p>	<p><b>+50%</b> Super Mushrooms</p>	<p><b>+46%</b> Magnesium</p>
<p><b>+5%</b> Ashwagandha</p>	<p><b>+6%</b> Kava</p>	<p><b>0%</b> Kratom</p>



# RTD Cocktails continue to grow

They remain a bright spot in alcohol as consumers seek out premium offerings within RTD options

Alcohol Department	\$74B	+2%	+2%
Subcategory	Sales	\$ Chg YoY	U Chg YoY
Beer	\$38B	+2%	+1%
Spirits & Liquor	\$10B	+2%	+4%
Flavored Malt Bev. & Others	\$8B	+2%	+4%
Red Wine	\$6B	-3%	-6%
White Wine	\$6B	+2%	-2%
RTD Cocktails	\$2B	+28%	+23%
Sparkling Wine	\$2B	+1%	-2%
Blush & Rose Wine	\$970M	-4%	-8%
Fortified & Other Specialty Wine	\$925M	+9%	+16%
Hard Cider	\$496M	+2%	-1%
Cocktail Mixes	\$309M	-2%	-10%
Bitter & Syrups & Others	\$80M	+8%	+3%



## VALUES-ORIENTED SHOPPER

# We used our perspective to define the values-oriented shopper

Values-oriented shoppers most answer favorable for 3 of the 5 questions:

For each of the product and packaging characteristics, please rate the level of importance to you when shopping for groceries.

Favorable

Product Certifications (USDA Organic, B Corp, etc.)

5

Label claims like Non-GMO, Gluten Free, etc.

4

Specific Diet Types like Keto, Paleo, Vegan, etc.

3

Presence of certain functional ingredients (high protein, fiber, etc.)

2

Ingredients (clean label, natural, no artificial etc.)

1

Neutral



## 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

**Front**

**Back**

**Labeled Grain Free** — GRAIN FREE TORTILLAS

**Contains Almond** — ALMOND FLOUR

**Category = Bread & Baked Goods**  
**Brand = Siete**  
**Product Type = Tortilla**  
**Brand Positioning = Natural**  
**International Positioning = Hispanic/South Am - Mexico**

**Paleo Diet-Friendly** — PALEO • NON-GMO • GLUTEN FREE • DAIRY FREE • SOY FREE • VEGAN

**Labeled Non-GMO** — NON-GMO

**Labeled Gluten Free** — GLUTEN FREE

**8 Pack** — 8 COUNT PACK

**Does Not Contain Dairy** — DAIRY FREE

**Does Not Contain Soy** — SOY FREE

**Labeled Vegan** — VEGAN

**Certified Non-GMO Project Verified** — CERTIFIED GF

**7oz** — NET WT 7 OZ (200g)

**Nutrition Facts**

Nutrition Facts	
4 servings per container	
Serving size 2 Tortillas (50g)	
Amount per serving	
<b>Calories</b>	<b>190</b>
<small>% Daily Value*</small>	
Total Fat 11g	14%
Saturated Fat 1g	6%
Trans Fat 0g	
Cholesterol 0mg	0%
Sodium 220mg	10%
Total Carbohydrate 20g	7%
Dietary Fiber 3g	11%
Total Sugars 1g	
Includes 0g Added Sugars	0%
Protein 6g	
Vitamin D 0mcg	0%
Calcium 60mg	6%
Iron 0.8mg	4%
Potassium 180mg	4%

**INGREDIENTS**  
 Almond flour, tapioca flour, water, sea salt, xanthan gum.  
 Contains: Almonds.

Distributed by Siete Family Foods, Austin, TX 78731  
 © 2020 Siete Family Foods  
 hola@sietefoods.com

**Serving Size = 50g**  
**Calories = 190cal**  
**Total Fat = 11g**  
**Sat Fat = 1**  
**Cholesterol = 0mg**  
**Sodium = 220mg**  
**Carbohydrate = 20g**  
**Sugars = 1g**  
**Protein = 6g**

Note: Not all attributes are shown  
 Source: SPINS



# Label Claims & Certifications

SPINS Positioning Coding ( Attribute Values, 14) & SPINS Ingredients: Wellness Benefit (Attribute Values, 169)

AGE  
 BRAND POSITIONING  
 EATING OCCASION  
 FAIR TRADE  
 FUNCTIONAL INGREDIENT  
 GENDER  
 HEALTH FOCUS  
 HOLIDAY POSITIONED  
 INTERNATIONAL  
 PALEO  
 PLANT BASED  
 POSITIONING GROUP  
 RAW  
 SIZE POSITIONING  
 INGREDIENT - BASIL  
 INGREDIENT - CINNAMON  
 INGREDIENT - CORIANDER  
 INGREDIENT - GARLIC  
 INGREDIENT - GINGER  
 INGREDIENT - ONION  
 INGREDIENT - OREGANO  
 INGREDIENT - PARSLEY  
 INGREDIENT - TURMERIC  
 INGREDIENT - ACACIA FIBER  
 INGREDIENT - ACAI  
 INGREDIENT - ACEROLA CHERRY  
 INGREDIENT - ACETYL L CARNITINE  
 INGREDIENT - ADAPTOGENS  
 INGREDIENT - ADDED BEAN PROTEIN  
 INGREDIENT - ADDED CHIA PROTEIN  
 INGREDIENT - ADDED CHICKPEA PROTEIN  
 INGREDIENT - ADDED DHA OMEGA3  
 INGREDIENT - ADDED EPA OMEGA3  
 INGREDIENT - ADDED FAVA BEAN PROTEIN  
 INGREDIENT - ADDED HEMP PROTEIN  
 INGREDIENT - ADDED MUNG BEAN PROTEIN  
 INGREDIENT - ADDED PEA PROTEIN

INGREDIENT - ADDED PUMPKIN SEED PROTEIN  
 INGREDIENT - ADDED RICE PROTEIN  
 INGREDIENT - ADDED SACHA INCHI PROTEIN  
 INGREDIENT - ADDED SOY PROTEIN  
 INGREDIENT - ADDED WATERMELON SEED PROTEIN  
 INGREDIENT - ADDED WHEY PROTEIN  
 INGREDIENT - AMARANTH  
 INGREDIENT - ANCIENT GRAINS  
 INGREDIENT - APPLE CIDER VINEGAR  
 INGREDIENT - ASHWAGANDHA  
 INGREDIENT - ASTRAGALUS  
 INGREDIENT - BACOPA  
 INGREDIENT - BAKUCHIOL  
 INGREDIENT - BEE POLLEN  
 INGREDIENT - BEE PROPOLIS  
 INGREDIENT - BERBERINE  
 INGREDIENT - BITTER MELON  
 INGREDIENT - BUCKWHEAT  
 INGREDIENT - CAFFEINE ENERGY  
 INGREDIENT - CALIFORNIA POPPY  
 INGREDIENT - CAMU CAMU  
 INGREDIENT - CASEIN  
 INGREDIENT - CHARCOAL  
 INGREDIENT - CHIA SEED  
 INGREDIENT - CHLORELLA  
 INGREDIENT - CHONDROITIN  
 INGREDIENT - CHROMIUM  
 INGREDIENT - COENZYME Q10  
 INGREDIENT - COFFEE FRUIT  
 INGREDIENT - COLLAGEN  
 INGREDIENT - COLLOIDAL OATMEAL  
 INGREDIENT - ECHINACEA  
 INGREDIENT - ELDERBERRY  
 INGREDIENT - ELEUTHERO  
 INGREDIENT - FARRO  
 INGREDIENT - FISH OIL  
 INGREDIENT - FLAX SEED

INGREDIENT - GABA  
 INGREDIENT - GINKGO BILOBA  
 INGREDIENT - GINSENG  
 INGREDIENT - GLUCOMMANAN  
 INGREDIENT - GLUCOSAMINE  
 INGREDIENT - GOJI BERRY  
 INGREDIENT - GREEN COFFEE BEAN  
 INGREDIENT - GREEN LIPPED MUSSELS  
 INGREDIENT - GREEN TEA  
 INGREDIENT - GUARANA  
 INGREDIENT - GUGGUL  
 INGREDIENT - GYMNEMA SYLVESTRE  
 INGREDIENT - HEMP SEED  
 INGREDIENT - HOLY BASIL  
 INGREDIENT - HUPERZINE  
 INGREDIENT - HYALURONIC ACID  
 INGREDIENT - INULIN  
 INGREDIENT - KAVA  
 INGREDIENT - KERATIN  
 INGREDIENT - KONJAC  
 INGREDIENT - KRILL OIL  
 INGREDIENT - L THEANINE  
 INGREDIENT - LEMON BALM  
 INGREDIENT - MACA  
 INGREDIENT - MAGNOLIA BARK  
 INGREDIENT - MANUKA HONEY  
 INGREDIENT - MATCHA  
 INGREDIENT - MELATONIN  
 INGREDIENT - MILLET  
 INGREDIENT - MINERAL SUNSCREEN  
 INGREDIENT - MORINGA  
 INGREDIENT - MSM  
 INGREDIENT - MUCUNA PRURIENS  
 INGREDIENT - MUSHROOM CHAGA  
 INGREDIENT - MUSHROOM CORDYCEPS  
 INGREDIENT - MUSHROOM LIONS MANDE  
 INGREDIENT - MUSHROOM MAITAKE

INGREDIENT - MUSHROOM REISHI  
 INGREDIENT - MUSHROOM SHIITAKE  
 INGREDIENT - MUSHROOM TURKEY TAIL  
 INGREDIENT - MYCOPROTEIN  
 INGREDIENT - NERVINES  
 INGREDIENT - NON ANIMAL DAIRY PROTEIN  
 INGREDIENT - NOOTROPICS  
 INGREDIENT - PASSIONFLOWER  
 INGREDIENT - PHOSPHATIDYL SERINE  
 INGREDIENT - PLANT STEROLS  
 INGREDIENT - PREBIOTICS  
 INGREDIENT - PROBIOTICS  
 INGREDIENT - PSYLLIUM  
 INGREDIENT - QUINOA  
 INGREDIENT - RED YEAST RICE  
 INGREDIENT - RETINOL  
 INGREDIENT - RHODIOLA ROSEA  
 INGREDIENT - ROSEHIPS  
 INGREDIENT - ROYAL JELLY  
 INGREDIENT - SALICYLIC ACID  
 INGREDIENT - SALMON OIL  
 INGREDIENT - SCHISANDRA  
 INGREDIENT - SEAWEED AND ALGAE  
 INGREDIENT - SKULLCAP  
 INGREDIENT - SORGHUM  
 INGREDIENT - SPIRULINA  
 INGREDIENT - SUPER FRUIT'S  
 INGREDIENT - SUPER GREENS  
 INGREDIENT - SUPER MUSHROOMS  
 INGREDIENT - SUPERFOODS  
 INGREDIENT - TAPIOCA SOLUBLE FIBER  
 INGREDIENT - TAURINE  
 INGREDIENT - TEA TREE OIL  
 INGREDIENT - TEFF  
 INGREDIENT - TITANIUM DIOXIDE  
 INGREDIENT - TRYPTOPHAN  
 INGREDIENT - ULTRAFILTERED MILK

INGREDIENT - VALERIAN  
 INGREDIENT - VERVAIN  
 INGREDIENT - VINPOCETINE  
 INGREDIENT - WHOLE GRAINS 1ST  
 INGREDIENT - WHOLE PUMPKIN SEED  
 INGREDIENT - WILLOW BARK  
 INGREDIENT - ZINC OXIDE  
 INGREDIENT - INSECT PROTEIN  
 PET - ADDED MINERALS  
 PET - ADDED VITAMINS  
 PET - WHOLE BEEF  
 PET - WHOLE BUFFALO  
 PET - WHOLE CHICKEN  
 PET - WHOLE DUCK  
 PET - WHOLE LAMB  
 PET - WHOLE MEAT 1ST  
 PET - WHOLE MEAT ONLY  
 PET - WHOLE SALMON  
 PET - WHOLE TURKEY  
 INGREDIENT - WHOLE APPLE  
 INGREDIENT - WHOLE AVOCADO  
 INGREDIENT - WHOLE BANANA  
 INGREDIENT - WHOLE BEAN  
 INGREDIENT - WHOLE BEET  
 INGREDIENT - WHOLE BLUEBERRY  
 INGREDIENT - WHOLE CAULIFLOWER  
 INGREDIENT - WHOLE CHICKPEA  
 INGREDIENT - WHOLE KALE  
 INGREDIENT - WHOLE LENTIL  
 INGREDIENT - WHOLE PEA  
 INGREDIENT - WHOLE PEAR  
 INGREDIENT - WHOLE PUMPKIN  
 INGREDIENT - WHOLE SPINACH  
 INGREDIENT - WHOLE STRAWBERRY  
 INGREDIENT - WHOLE SWEET POTATO

# 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**.

**Category Landscape** Filters: MULOC/Natural/Pet > TPL > All Departments > Kombucha & Other Functional Beverages > Functional Beverage Other

	Attribute Share	Attribute Share Point Chg	Att Sales (M)	Att Sales % Chg	ARP	ARP % Chg	Attribute Facts
<b>Health Focus Positioning</b>							
Digestive Health	44%	-9.2	\$82	-7%			
Health Focus - Non Specific	30%	7.3	\$55	49%			
Energy Support	10%	0.2	\$19	14%			
<b>Mood Support</b>	<b>7%</b>	<b>3.9</b>	<b>\$13</b>	<b>151%</b>			Attribute: Mood Support Health Focus Positioning is a primary health condition for. The attribute is associated with product imagery, and other off-label information as
Cognitive Health	2%	-0.7	\$3	-20%			
Hair & Skin & Nails	2%	-0.2	\$3	2%			
Pain & Inflammation	1%	-0.1	\$2	0%			
Cold & Flu	1%	0.2	\$2	34%			
Sleep	1%	-0.4	\$2	-21%			
Performance	1%	-0.4	\$2	-27%	\$2.72	10%	
Immune Health	1%	-0.5	\$1	-42%	\$2.86	8%	
Hydration	0%	0.1	\$0	148%	\$2.84	-15%	
Cleanse & Detox	0%	-0.2	\$0	-36%	\$3.41	-0%	
Weight Loss	0%	-0.1	\$0	-43%	\$5.24	-1%	
Cardiovascular Health	0%	0.0	\$0	58%	\$4.23	1%	

**Example: 7% of Functional Beverage Sales in MULO + Natural have 'mood support' health focus positioning, which has grown +3.9pts.**

Top Brands with Attribute	Brand Share of Att	Brand Att Sales (M)
Hiyo	41%	\$5
Kin Euphorics	23%	\$3
Crescent 9	9%	\$1
Goldthread	6%	\$1
Vybes	5%	\$1
Sunwink	3%	\$0

**Top Items with Attribute**

- Hiyo Blackberry Lemon Tonic Og 12 Oz (4 Pk)
- Hiyo Watermelon Lime Sprkling Tnc 12 Oz (4 ...)
- Hiyo Spark Pch Mango Tonic Og 12oz(4pk)
- Kin Euphorics Bloom Embodied Joy 8 Oz (4 Pk)
- Kin Euphorics Lightwave Tonic Ogc 8oz (4pk)
- Goldthread Lavender Bliss Hrbl Tnic Ogc 12 Oz
- Kin Euphorics Lightwave Ogc 8 Oz

**Rank by Attribute prevalence or Trend, to see which attributes are "table stakes" in your category, and which are up & coming.**

# Product Intelligence – SPINS AttLab



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

**Brand Compare** Filters: MULOC > TPL > All Departments > Kombucha & Other Functional Beverages > Functional Beverage Other

Select Brands Using CTRL button	Sales	Sales % Chg
Kevita	\$43,273,855	-17%
Gts Living Foods	\$36,431,868	88%
Petey's Bing	\$14,620,171	2%
Rebbl	\$10,096,551	-19%
Bragg	\$9,308,861	-21%
Doctor Ds	\$8,162,028	14%
Goldthread	\$7,807,515	-5%
Wildwonder	\$7,790,041	257%
De La Calle	\$6,538,397	66%
Hiyo	\$5,404,618	197...
<b>Kin Euphorics</b>	<b>\$4,772,655</b>	<b>90%</b>
<b>Odyssey</b>	<b>\$4,571,061</b>	<b>110%</b>
Recess	\$2,409,875	143...
Vybes	\$2,310,638	-16%
Neuro	\$2,271,215	-28%
Mamma Chia	\$1,964,983	-11%
Lifeaid	\$1,953,886	-34%
Natalies Orchid Isl...	\$1,892,904	12%
	<b>\$1,505,284</b>	<b>276%</b>
	\$1,370,423	-43%
	\$1,251,164	new
	\$633,132	254%
	\$598,322	6%
	\$450,583	0%
	\$398,566	-58%
	\$371,331	134...
	\$364,939	-14%
	\$357,144	-30%
	\$354,366	new
	\$307,824	101%

	Kin Euphorics	Odyssey	Zyn
<b>Health Focus Positioning</b>			
Energy Support	0%	86%	0%
Mood Support	63%	3%	0%
Cold & Flu	14%	0%	55%
Health Focus - Non Specific	21%	0%	20%
Cognitive Health	0%	11%	0%
Immune Health	0%	0%	25%

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**.

**SPINS AttLab** Category Landscape Brand Compare **Innovation** Cross-Cat Compare Brand Deep Dive

**Geography**  
MULOC/Natural/Pet

**Brand Positioning Group**  
All

**Department Group, Department**  
All

**Category, Subcategory**  
Kombucha & Other Functional Beve...

**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 > Kombucha & Other Functional Beverages > Functional Beverage Other

Attribute: What is unique about the 162 new items in this category?

Attribute	Innovation Index	% of New Item \$	% of Existing Item \$
Mood Support	684	40%	6%
Health Focus - Non Specific	106	31%	30%
Energy Support	51	5%	11%
Digestive Health	50	22%	45%
Cognitive Health	29	1%	2%
Cold & Flu	0	0%	1%
Hair & Skin & Nails	0	0%	2%
Pain & Inflammation	0	0%	1%
Sleep			

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

In this example, **162** Functional Beverage items launched in the last 52 weeks.

**Identify attributes driving innovation.**

In this example, 'Mood Support' is showing up in Functional Beverages, with 40% of *new* Functional Beverages have 'Mood Support' health focus positioning, compared to only 6% of *existing* Functional Beverage item sales.

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

In this example, 'Crescent 9 Tropical THC Seltzer' is the top NEW Functional Beverage item launched in L52 that is 'mood support' positioned.

attribute, ranked by \$ Sales

Crescent 9 Tropical Thc Seltzer 12 Oz (12 Pk)	08-50031-54249
Crescent 9 Tropical Thc Seltzer 12 Oz (4 Pk)	08-50031-54248
Hiyo Strawberry Guava Tonic Og 12 Oz (4 Pk)	08-60005-33231
Crescent 9 Strawberry Lemonade 50mg Drnk 12oz	08-50031-54241
Kin Eurphorics Variety Pack Ogc 8oz (4pk)	08-52333-00844
Urban South Lemon Lavender Driftee	08-60010-47611
Urban South Grapefruit Driftee	08-60010-47610
Crescent 9 Ginger Lemonade Thc Seltzer	08-50031-54250
Urban South Tangerine Ginger Driftee	08-60010-47613
Odyssey Revive Prckly Pear Ogc 12 Oz	08-50025-76570

# Product Intelligence – SPINS AttLab



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

**SPINS AttLab** Category Landscape Brand Compare Innovation **Cross-Cat Compare** Brand Deep Dive

**Cross-Category Compare** Filters: MULOOC/Natural/Pet > TPL > All Departments

Select 1 Attribute Value: Mood Support

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

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

Categories	Total Cat \$ (M)	Att \$ (M)	Att % of Cat	Chg	Cat \$ % Chg	% Chg
<b>Total</b>	\$736,002	\$341	0%	0.0	1%	3%
Kombucha & Other Functional Beverage...	\$1,167	\$20	2%	0.7	7%	76%
Other Supplements	\$1,565	\$56	4%	0.3	-4%	6%
Vitamins & Minerals	\$3,371	\$44	1%	0.1	2%	14%
Water	\$13,660	\$20	0%	0.1	0%	64%
Homeopathic Medicines	\$510	\$3	1%	0.0	-17%	-14%
Superfood & Whole Food Supplements	\$504	\$0	0%			05%
Soda	\$31,350	\$1	0%			57%
Aromatherapy & Body Oils	\$319	\$0	0%			0%
Baby & Toddler Food	\$2,041	\$0	0%			0%
Bacon & Refrigerated Breakfast Meats	\$6,092	\$0	0%			0%
Beer & Hard Cider & Other Malt Beverage...	\$20,565	\$0	0%			0%
Body Care Kits	\$335	\$0	0%			0%
Body Fragrances & Perfumes	\$840	\$0	0%			0%
Bread & Baked Goods	\$29,061	\$0	0%			1%
Candles	\$983	\$0	0%			-7%
Cosmetics & Beauty Products	\$8,249	\$0	0%			-0%
Creams & Creamers	\$5,895	\$0	0%			2%
						0%
						2%
						-3%
						8%
						3%
						6%
						5%
						-3%
						-2%
						-5%

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 'Kombucha & Other Functional Beverage' brands that are positioned as 'mood support'?

**Attribute Facts**

Attribute: Mood Support  
Attribute Family: Health Focus Positioning

**Definition:** Identifies a primary health condition a product is marketed for. The attribute combines label claims with product imagery, ingredients, and other off-label information as required.

Top Brands with Attribute	Brand Share of Att	Brand Att Sales (M)
So Good So You	28%	\$6
Hijo	28%	\$5
Kin Euphorics	15%	\$3
Crescent 9	6%	\$1
Rowdy Mermaid	5%	\$1
Goldthread	4%	\$1

**Top Items with Attribute**

So Good So You Happy Bd Org Shot Og 1.7 Oz  
Hijo Blackberry Lemon Tonic Og 12 Oz (4 Pk)  
Hijo Watermelon Lime Sprkling Tnc 12 Oz (4 Pk)  
Hijo Spark Pch Mango Tonic Og 12oz(4pk)  
Kin Euphorics Bloom Embodied Joy 8 Oz (4 Pk)  
Kin Euphorics Lightwave Tonic Onr 8oz (4nk)

# 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.

**Brand Deep Dive** Filters: MULOC/Natural/Pet > TPL > All Departments > Komb

Select 1 Attribute Value: Mood Support

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

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
Hiyo	41%	\$5,411	1980%	\$5,151	58%	140	100%	0.0
Kin Euphorics	23%	\$3,030	87%	\$1,409	16%	68	63%	-0.9
Crescent 9	9%	\$1,213	New	\$1,213	14%	147	97%	96.9
Goldthread	6%	\$745	-8%	-\$69	0%	0	10%	-0.4
Vybes	5%	\$610	-13%					
Sunwink	3%	\$378	-43%					
Rowdy Mermaid	3%	\$353	-31%					
Urban South Brewery	2%	\$298	New					
Odyssey	1%	\$151	New					
Parch	1%	\$129	2054%					
Elixirart	1%	\$129	37%	\$35	0%	40	100%	0.0
Cann	1%	\$70	New	\$70	1%	147	56%	56.1

**Mood Support**

Total Attribute Sales (000) 13,161

Total Attribute Sales % Chg 151%

# of Brands with Attribute 45

Top Brand (Latest 52 Sales) Hiyo

Top Grower (Pos Sales Chg) Hiyo

Top Decliner (Neg Sales Chg) Sunwink

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

In this example, 100% of Hiyo is 'mood support'.

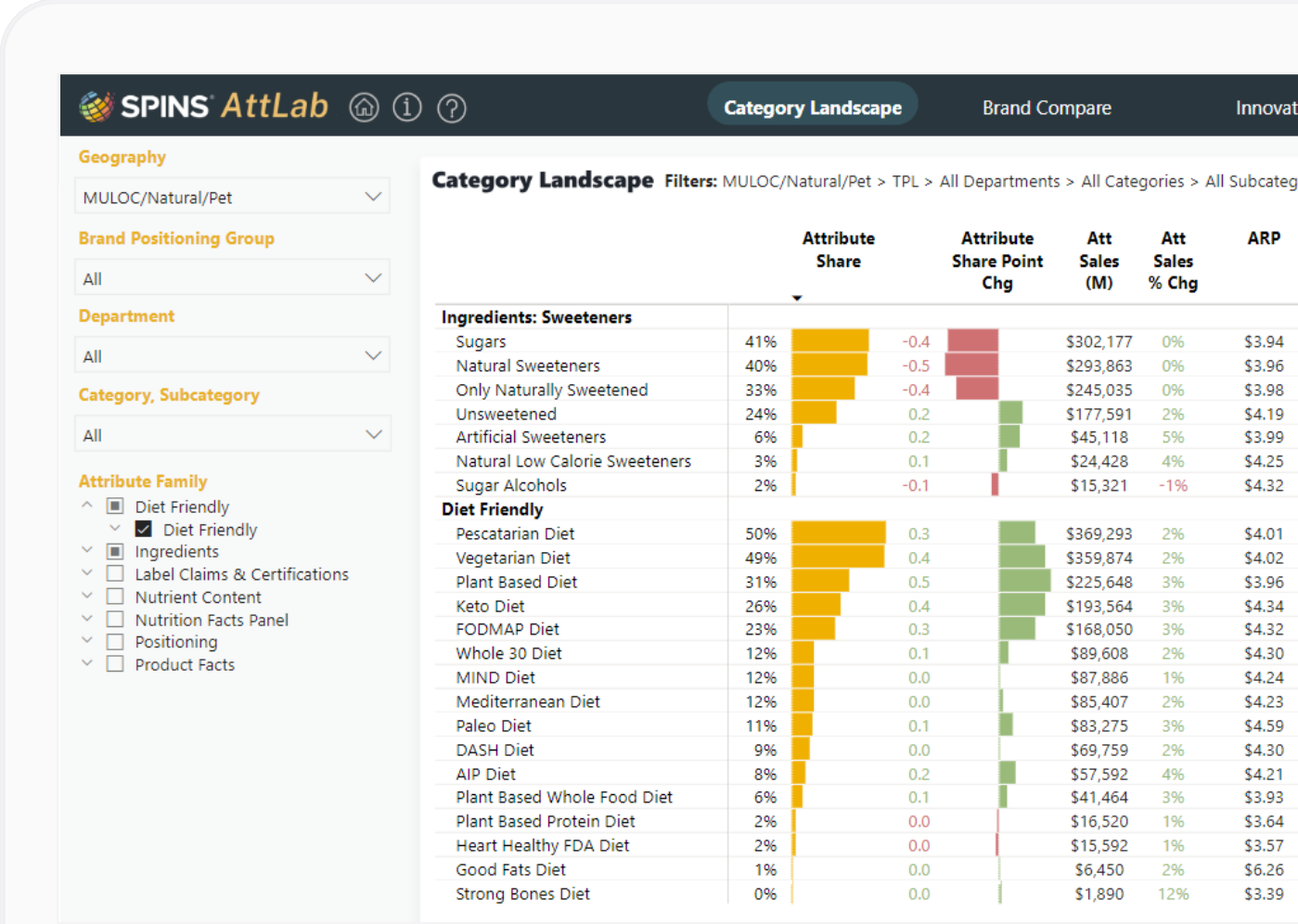
Top 10 Mood Support items for Hiyo:

- Hiyo Blackberry Lemon Tonic Og 12 Oz (4 Pk)
- Hiyo Watermelon Lime Sprkling Tnc 12 Oz (4 Pk)
- Hiyo Spark Pch Mango Tonic Og 12oz(4pk)
- Hiyo Sparkling Peach Mango Tonic Og 12 Oz
- Hiyo Watermelon Lime Sparkling Tonic Og 12oz
- Hiyo Strawberry Guava Tonic Og 12 Oz (4 Pk)

All Health Focus Positioning values for Hiyo:

Attribute	Att S Shr of Brand	Pt Chg
Mood Support	100%	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 Brandon at [bcasteel@spins.com](mailto:bcasteel@spins.com)



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## Appendix

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# 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

# 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

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
<b>LABEL CLAIMS</b> Displayed as "Labeled..."	X					
<b>CERTIFICATIONS</b> Displayed as "Certified..."						X
<b>INGREDIENTS</b> Displayed as "Ingredient..."		X				
<b>DIET FRIENDLY</b> Displayed as "Diet..."		X	X			
<b>NUTRITION FACT PANEL</b> Displayed as "NFP Range..."			X			
<b>POSITIONING</b> No common display name	X	X			X	
<b>PRODUCT FACTS</b> No common display name	X			X		

Click on an attribute type to learn more about it!

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?

SPINS AttLab 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

**Category Landscape** Filters: Natural > Grocery > Shelf Stable Candy > All Subcategories

	Attribute \$ Share	Attribute \$ Share Point Chg	Att \$ Sales (M)	Att \$ % Chg	Excl Brand	Brand	Gap
<b>Label Claims</b>							
Labeled Non-Gmo	56%	-0.4	\$224	4%	58%	0%	-58
Labeled Gluten Free	44%	1.0	\$176	8%	45%	0%	-45
Labeled Organic	44%	1.3	\$174	9%	45%	0%	-45
Fair Trade	43%	-0.7	\$171	3%	41%	94%	52
Labeled Vegan	29%	1.9	\$115	13%	30%	0%	-30
<b>Labeled Allergen Friendly</b>	<b>4%</b>	<b>0.5</b>	<b>\$16</b>	<b>20%</b>	<b>4%</b>	<b>0%</b>	<b>-4</b>
Labeled Grain Free	1%	-0.1	\$3	-13%	1%	0%	-1
Labeled Sprouted	1%	-0.1	\$3	-9%	1%	0%	-1
Labeled Ancient Grain	0%	0.0	\$0	-2%	0%	0%	0
<b>Certifications</b>							
Certified Non-Gmo Project Verif...	33%	0.2	\$131	6%	34%	0%	-34
Certified Fairtrade America	12%	-0.2	\$47	4%	12%	4%	-8
Certified B Corporation	8%	-0.5	\$34	-0%	6%	89%	83
Certified Paleo Foundation - Pal...	4%	0.6	\$16	24%	4%	0%	-4
Certified Fair Trade Usa	1%	-0.2	\$5	-9%	1%	0%	-1
Certified Paleo Foundation - Keto	1%	0.1	\$3	15%	1%	0%	-1
Certified Plant Based Foods Ass...	0%	0.1	\$1	29%	0%	0%	0
Certified Upcycled	0%	0.1	\$0	New	0%	0%	0
Certified Detox Project - Glypho...	0%	-0.1	\$0	-79%	0%	0%	0
Certified Paleo Foundation - Pal...	0%	0.0	\$0	146%	0%	0%	0
Certified Greener World - Anim...	0%	0.0	\$0	-17%	0%	0%	0
Certified Paleo Foundation - Pal...	0%	0.0	\$0	164...	0%	0%	0

**Attribute:** Labeled Allergen Friendly  
**Attribute Family:** Label Claims  
**Definition:** Identifies products in select categories with a label claim of or equivalent to "Allergen Friendly." While this type of claim or its equivalents are typically associated with products free of the Major 9 Allergens, that is not always the case. Label claims stating the absence of individual allergens such as "soy free" or "peanut free" are NOT considered equivalents.

Top Brands with Attribute	Brand \$ (K)	Att \$ Shr of Brand	Brand Att \$ (K)
Yumearth	\$10,558	99%	\$10,419
Enjoy Life	\$1,423	100%	\$1,422
Free2B	\$1,126	100%	\$1,126
Surf Sweets	\$1,319	76%	\$997
Undercover ...	\$572	44%	\$252
Pascha	\$210	57%	\$119

**Top Items with Attribute**

- Yum Earth Fruit Snacks Og 0.7 Oz (5 Pk)
- Yumearth Assorted Fruit Pops 20pc+ Og 4.2 ...
- Enjoy Life Boom Choco Ricemilk Crunch 1.12...
- Yumearth Chewy Candy Bites Og 5oz
- Yumearth Candy Canes Og 10 Ct
- Yumearth Licorice Strawberry Og 5 Oz
- Yumearth Licorice Pomegranate Og 5 Oz

Source: SPINS POS Data 52 Weeks Ending 8/13/23

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.

**Category Landscape** Filters: Natural > Grocery > Shelf Stable Candy > All Subcategories

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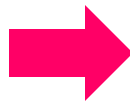
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Source: SPINS POS Data 52 Weeks Ending 8/13/23



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

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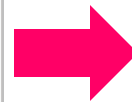
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- Yumearth Licorice Pomegranate Og 5 Oz

Source: SPINS POS Data 52 Weeks Ending 8/13/23



## Frequently Asked Questions

[Click here to learn about SPINS Attribute Types](#)

### Measures

**How is \$ Share calculated?**  
 \$ Share in this report refers to an Attribute's \$ share of a category, subcategory, or brand. For example, **if a brand has 3 items**, and each item sold \$100 in L52, and **2 of those items is 'Labeled Gluten Free'**, and the other 2 items are 'Not Labeled Gluten Free', then the 'Labeled Gluten Free' \$ Share for that brand is **33%**.  
 For a detailed illustration of \$ Share, [click here](#).

**Can I look at distribution facts like TDPs?**  
 Great question! AttLab beta will only contain \$, but we agree that TDPs could be of added value, and therefore are exploring it as a future enhancement.

**Why do my category and/or my brand's \$ Sales look too low based on what I know?**  
**Reason 1:** This report does not include Private Label, as Private Label attribute availability varies due to retailer restrictions and protections. UPCs are often "masked" (we don't know the actual UPC as it's hidden from us), making it near impossible to assign even a subset of our 300+ attributes.  
**Reason 2:** Even some branded UPCs can be "masked" based on retailer restrictions. While this is rarer, it can lead to discrepancies between a Brand's \$ Sales pulled at the **Brand level vs. UPC level**. This is because the masked UPC sales do get included in the Brand roll-up (the retailer is okay with reporting it out that way), even though they aren't available broken out by individual UPC.

### Product Coding

**Why don't some attributes show up for certain categories/subcategories?**  
 Not all attributes are available in all subcategories. SPINS Product Intelligence uses a combination of scalability, relevancy, applicability, and coverage thresholds when determining attribute availability per subcategory.  
 For more information, contact your SPINS Customer Success Manager.

**I found something that looks miscoded, what should I do? (e.g. My brand is 100% Labeled Gluten Free, but the report is only showing 95%)**  
 This could mean that one or several items are miscoded. Please contact your SPINS Customer Success Manager alerting them, and they will submit a ticket to get it corrected.

**I don't see a particular attribute I'm interested in. Where is it?**  
 There are a few reasons this could be the case:  
**Reason 1:** You're on a dashboard like "Category Landscape" where attributes with <1% \$ share are hidden. Click on the "Product Coding Notes" button in bottom right of dashboard to learn more.  
**Reason 2:** The attribute isn't coded for the specific category/subcat you're looking at (see FAQ above).  
**Reason 3:** SPINS does not code that attribute yet at all. If you think this is the case, and you have an attribute you'd like to see, contact your SPINS Customer Success Manager.

### Other

**Can I export data into Excel? Powerpoint?**  
**Excel:** Yes! When looking at an individual visualization (e.g. a table), you can hover in the top right and click on the "... ("More Options") then select "Export Data".  
**PowerPoint:** Yes! You can either screenshot a visual, or at the top of the page click "Export" → "PowerPoint" → Embed an image.

**What does "beta" mean in this case?**  
 This is our first version of this product. Over time, it will be iterated upon and scaled to be available alongside your other SPINS tools (Satori, Destini, Pinto, etc.). As a beta client, you will be informed in advance of a transition to the scalable version of this solution.

**I have a question not answered here. Who do I reach out to for support?**  
 Please contact your SPINS Customer Success Manager.

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