



SPINS[®]



IndiePet

Independent & Neighborhood
Pet Retail Association

2021 SPINS Pet Recap





IndiePet's Mission

To empower independent and neighborhood pet retailers to work together as peers for the wellbeing of North American pets and pet owners as they maintain a strong, sustainable and growing place at the heart of the pet industry.

SPINS is dedicated to supporting IndiePet's mission by providing IndiePet Retailers accurate data, emerging trends, and thought-provoking insights.





Who Is IndiePet?

IndiePet is the only organization that is tightly focused on strengthening the approximately 8,000 independent and neighborhood pet retail locations serving pets and pet parents in North America.

Founding Sponsors:

All Points Marketing, Inc.
Animal Supply
Astro Loyalty
Central Pet Distribution
Champion Petfoods
Coastal Pet Products
Earth Animal Ventures
eTail Pet, Inc.
Farmina Pet Food USA LC

FirstMate Pet Foods
Fluff & Tuff
Fromm Family Foods
Grandma Lucy's
Grizzly Pet
inClover
Instinct Pet Food
Kiwi Kitchens
Nature's Logic

NexPet-Grandma Mae's
Naturals
Nulo Pet Food, Inc.
Open Farm
Pet Business
Pet Food Experts
Pets Global, Inc
Phillips Pet Food & Supplies
Primal Pet Foods

RAWZ Natural Pet Food
RC Pets
Redbarn Pet Products
Stella & Chewy's
Sustainably Yours
Tall Tails
Tucker's
Tuffy's Pet Foods, Inc

Who is SPINS?

Independent pet retailers who are on a mission to serve their community with healthier and better-for-pet products rely on SPINS for relevant insights on what pet parents are buying, when, and why.

As a trusted market intelligence partner, SPINS is committed to helping neighborhood stores maintain their independent spirit and differentiate from big box and online retail.

Over the past two decades, SPINS has been investing in helping independent retailers drive growth.

Your participation makes the community stronger.





SPINS: Inspiring the Pursuit of Wellness

- Informing consumers on their wellness journey
- Delivering innovation for retailers
- Actionable insights for brands

SPINS Data Network

Innovative and Emerging Products

From proprietary and conventional sources

SPINS Product Intelligence

Products classified with machine learning, data science, and human knowledge

Common Language

Standardized attributes, harmonization, client hierarchies

Applications:

- SPINS
- Retailers
- Tech Partners
- Brands

Attribute enhanced data powers an array of solutions

SPINS Pet Channel

Definition

- Pet stores carrying pet food and treats. These stores tend to focus on differentiated and locally sourced products
- Have multi-pet offerings with a strong focus on cat and/or dog owners
- Includes banners with 5-200 stores
- EncoRepresents about \$1.2B in total sales
- mpasses approximately 1,100 stores



SPINS PET DEPARTMENT TRENDS – 2021 CATEGORY RECAP

2021 Pet Performance

2021 has been a strong year for Independent Pet Retailers, with more pet owners returning to the market after stock-up due to COVID last year



Pet Care & Wellness



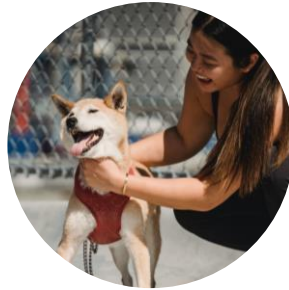
+8.8%

Pet Food



+11.2%

Pet Habitat & Travel & Other Supplies



+17.2%

Pet Toys & Collars & Apparel



+22.3%

Pet Treats



+18.9%

Pet Waste Management



+14.5%

Trends in Pet Treats

Pet parents are at home more with their pets and are purchasing treats more than ever since last years stock-up phase in 2020 due to the pandemic.



+18.9%

**Pet Treats
\$ Growth YoY**

Dog Treats



+21.7%

Cat Treats



+20.8%

Rawhides and Chews



+14.7%

SPINS PET DEPARTMENT TRENDS – TREATS

Trends in Pet Treats

Pet parents are at home more with their pets and are purchasing treats more than ever since last years stock-up phase in 2020 due to the pandemic.



Dog Treats



Honest Kitchen
Goat Milk Cookies
+7,528.1%
\$'S Yoy

Cat Treats



Redbarn Naturals
Protein Puffs
+97.2%
\$'S Yoy

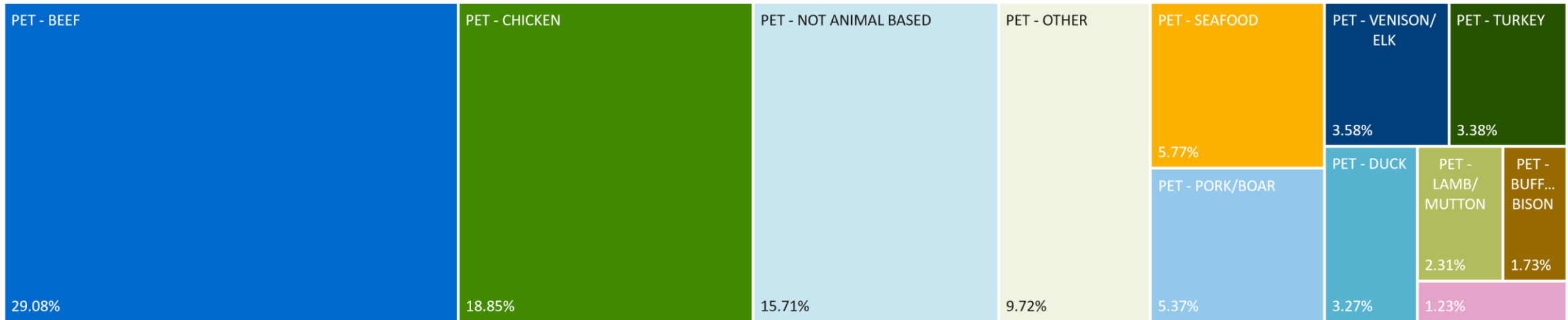
Rawhides and Chews



The Natural Dog Co
Bully Sticks
+189.8%
\$'S Yoy

Trends in Pet Treats – Animal Type

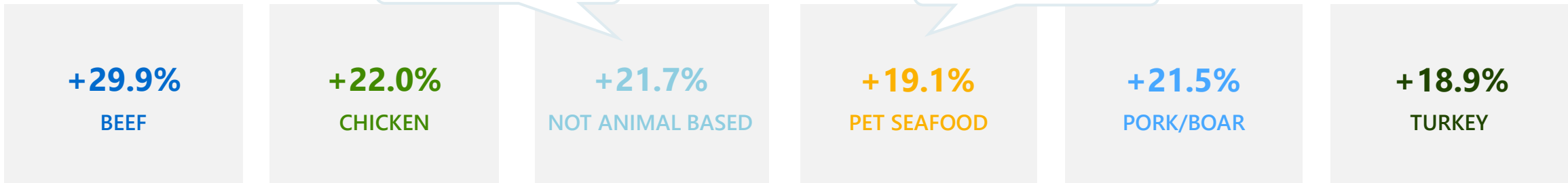
Pet Animal Types by Dollar Share



What to Know:

Owners are purchasing more meat alternatives for treats

Seafood based treats have grown extensively in 2021



Trends in Pet Treats – Meat Alternatives

Peanut butter, pumpkin, & sweet potato-based treats as an alternative to chicken and beef



- Pumpkin, Potato, and Apple based treats
- Crunchy 8-calorie
- Free of Wheat, Corn, Soy, & Artificial flavors and colors



Front Porch Pets.



- Sweet Potato based dog treat/chew
- Just 1 ingredient!
- Great for large energetic dogs



- Peanut butter and rolled-oats based training treats
- No corn, wheat, soy

SPINS PET DEPARTMENT TRENDS – PET CARE & WELLNESS AND HARD GOODS

Trends in Pet Care & Wellness and Hard Goods

With the boom in adoption rates and COVID-19 protocols, more pet parents have been at home with their pets, leading to **growth** in grooming and **bathing supplies, vitamins and supplements, and pet toys** to keep their pets healthy and well entertained.



Grooming & Bathing



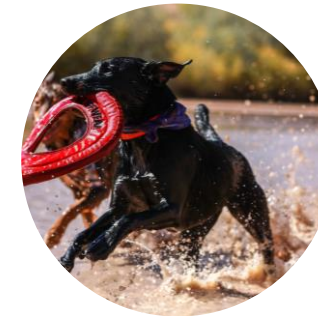
+10.1%

Vitamins & Supplements



+22.5%

Pet Toys



+24.8%

SPINS PET DEPARTMENT TRENDS – CONSUMABLE TRENDS

Trends in Pet Food Storage and Forms



Although Frozen and Refrigerated constitute a small overall dollar share, products in the space have grown extensively in dollars vs YAGO

Wet, soft & chewy, dehydrated, and freeze dried have also reported double digit growth in 2021, with more owners purchasing newer forms of food and treats for their pets from the usual dry kibble

*Coded products only, does not include un-coded products	Pet	
	Dol\$ Share	Dol % Chg
STORAGE TYPE		
SHELF STABLE	92.76%	12.04%
FROZEN	7.01%	13.71%
REFRIGERATED	0.23%	62.30%
FORM		
DRY	61.94%	8.91%
WET	19.23%	16.86%
SOFT & CHEWY	8.35%	22.87%
DEHYDRATED	5.47%	11.09%
FREEZE DRIED	4.33%	27.68%
LIQUID/PASTE	0.67%	47.22%

SPINS PET DEPARTMENT TRENDS – FUNCTIONAL INGREDIENTS

Functional Ingredients Drove Growth in 2021

What ingredients are you looking for when shopping treats for your furry friends? Antioxidant and immunity, gut health, anti-inflammatory, and skin and coat health continue to report growth as customers focus on healthier and functional treats for their pets.



Antioxidant and Immunity

+28.1%

MULTIPLE VITAMIN -
ADULT

+3.1%

CHLOROPHYLL /
CHLORELLA

+38.4%

CRANBERRY
SUPPLEMENTS

Gut Health

+15.4%

DIGESTIVE ENZYMES -
OTHER

+40.3%

PUMPKIN

+28.6%

PROBIOTIC SUPPLEMENT

Anti-Inflammatory

+6.6%

GLUCOSAMINE
CHONDROITIN COMBO

+23.8%

CANNABIDIOL (CBD)

+32.3%

HEMP SEEDS &
DERIVATIVES

Skin & Coat Health

+16.7%

FLAX SEED AND/OR OIL

+131.6%

COLLAGEN PRODUCTS

+30.9%

FISH OIL CONCENTRATE

SPINS PET DEPARTMENT TRENDS – FUNCTIONAL INGREDIENTS

Trends in Functional Ingredients

Owners are looking for more functional based products for their pets to help with immunity, digestion, anxiety, and coat health.



Multifunctional Naturvet



**Calming Aid Chews
+64.1% YoY**

Anti-Inflammatory Pet Releaf



**Edibles CBD Chews
+646.7% YoY**

Gut Health Fruitables



**Pumpkin Superblend
+48.4% S's YoY**

Skin & Coat Health Ultra Oil



**Skin & Coat Supplement
+27.0% S's YoY**

SPINS PET DEPARTMENT TRENDS – CBD

Growth in CBD in 2021

Pet owners are showing renewed interest in CBD after a slow 2020. Pet parents are seeking new forms of CBD in chews/treats vs oils with the growth in pet treats in 2020.



+23.8%

CBD
\$ Growth YoY

YTD Ending 10/3/21

CBD Oils

57.1%
\$ Share

-6.8%

50.3%
\$ Share

52 Weeks
Ending 12/27/20

52 Weeks
Ending 12/26/21

CBD Chews/Treats

42.9%
\$ Share

+6.8%

49.7%
\$ Share

52 Weeks
Ending 12/27/20

52 Weeks
Ending 12/26/21



APPENDIX



The Data Parameters Behind Our Reports



Member Insights
powered by SPINS

Retail Channels		<p>SPINS PET (PET)</p> <p>REGIONAL & INDEPENDENT GROCERY (RIG)</p> <p>CONVENTIONAL MULTI OUTLET (MULO)</p>	<p>Stores that sell primarily food and treats while offering pet care and wellness, waste management, toys, collars, habitat, travel with a focus on dogs and cats.</p> <p>EXAMPLE RETAILERS: </p> <p>Traditional full format grocery stores with at least \$2MM ACV, and less than 40% of UPC-coded sales from natural/organic/specialty products.</p> <p>EXAMPLE RETAILERS: </p> <p>A joint venture with IRI Worldwide comprised of over 105,000 retail locations spanning Grocery, Drug, Mass, Dollar, Military, and Club.</p> <p>EXAMPLE RETAILERS: </p>
Products	_____	Department, Category, Subcategory or Attribute	
Positioning Groups	_____	<p>Natural Positioning - This grouping identifies products from naturally positioned brands, including those that offer certain ingredient standards, and/or environmental and sustainable mission-driven benefits.</p> <p>Specialty & Wellness Positioning – Grouping products perceived as artisanal, premium, locally crafted, or products that stress “functionality”, better-for-you or sustainability elements.</p> <p>Conventional Positioning - Brands include those that have been recognized as the standard or iconic brands in mass food, drug and grocery outlets.</p>	
Timeframe	_____	52 Weeks (Current & Yago)	
Measures	_____	<p>Dollar Volume (Current & Yago)</p> <p>Dollar Share</p> <p>Growth Percentage (Unit and Dollar)</p>	

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SPINS offers full pet coverage by category and subcategory



The SPINS Product Intelligence Behind Our Reports



Member Insights
powered by SPINS

SPINS attributes, including product ingredient and package claim data, are overlaid across the Neighborhood Pet channel, creating new insights.

PRODUCT BASICS
<ul style="list-style-type: none"><input type="checkbox"/> SPINS Brand<input type="checkbox"/> SPINS Company<input type="checkbox"/> SPINS Item Description
PRODUCT CLASSIFICATIONS
<ul style="list-style-type: none"><input type="checkbox"/> SPINS Category<input type="checkbox"/> SPINS Department<input type="checkbox"/> SPINS Positioning Group<ul style="list-style-type: none"><input type="checkbox"/> Natural Positioning<input type="checkbox"/> Specialty & Wellness Positioning<input type="checkbox"/> Conventional Positioning<input type="checkbox"/> SPINS Subcategory
NATURAL CLAIMS
<ul style="list-style-type: none"><input type="checkbox"/> Labeled Organic (95-100%)<input type="checkbox"/> Labeled Non-GMO<input type="checkbox"/> Certified Non-GMO Project Verified
SOCIAL CONSCIOUSNESS CERT.
<ul style="list-style-type: none"><input type="checkbox"/> Certified B Corporation

PRODUCT FACTS
<ul style="list-style-type: none"><input type="checkbox"/> Age (puppy, senior, etc.)<input type="checkbox"/> Form (wet, dry)<input type="checkbox"/> Packaging Type<input type="checkbox"/> Storage (frozen, refrigerated)
GENERAL INTOLERANCES
<ul style="list-style-type: none"><input type="checkbox"/> Ingredient – Grain<input type="checkbox"/> Labeled Grain Free<input type="checkbox"/> Labeled Gluten Free
FUNCTIONAL INGREDIENTS
<ul style="list-style-type: none"><input type="checkbox"/> Fish Oil Concentrate<input type="checkbox"/> Flax Seed Oil<input type="checkbox"/> Chia Seed/ Chia Oil<input type="checkbox"/> CBD<input type="checkbox"/> Glucosamine Chondroitin Combo<input type="checkbox"/> Glucosamine<input type="checkbox"/> Probiotic<input type="checkbox"/> Chlorophyll / Chlorella<input type="checkbox"/> Hemp Seed<input type="checkbox"/> Pumpkin

PET WELLNESS INGREDIENTS
<ul style="list-style-type: none"><input type="checkbox"/> Whole Beef<input type="checkbox"/> Whole Buffalo<input type="checkbox"/> Whole Chicken<input type="checkbox"/> Whole Duck<input type="checkbox"/> Whole Lamb<input type="checkbox"/> Whole Salmon<input type="checkbox"/> Whole Turkey
GUARANTEED ANALYSIS
<ul style="list-style-type: none"><input type="checkbox"/> Crude Fat<input type="checkbox"/> Crude Fiber<input type="checkbox"/> Crude Moisture<input type="checkbox"/> Crude Protein
DIETS
<ul style="list-style-type: none"><input type="checkbox"/> Raw<input type="checkbox"/> Animal Type



Only SPINS offers insights into what motivates pet parents to buy by combining product intelligence with sales data.



Brand Positioning

CONVENTIONAL

- These brands typically have a large footprint in and emerge via traditional conventional retailers
- Brands include those that have been recognized as the standard or iconic brands in Food, Drug, and Mass retail outlets

Example Brands:



NATURAL

- The Natural Positioning Group includes a wide range of products that appeal across the “natural” spectrum
- Products in the Natural Positioning Group reach a wide range of retail markets and shoppers.
- This grouping captures products from naturally positioned brands, including those that offer certain ingredient standards, and/or environmental and sustainable mission-driven benefits.



SPECIALTY & WELLNESS

- The Specialty & Wellness Positioning Group is comprised of two distinct ranges of products:
- Products that stress “functionality” as well as products promoting other better-for-you or sustainability elements but have limited appeal to the core natural consumer.
- Products perceived as artisanal, premium, locally crafted, or culturally unique such as international or imported products.



Age Attributes

PUPPY/KITTEN (Age)

Identifies the primary age group a product is marketed for based on label claims and intended use

Animal Type Attributes

BEEF

This attribute evaluates the ingredient statement and identifies products containing beef and beef derived ingredients. This attribute does not identify products or ingredients which contain artificial beef flavors, generic and nonspecific casings and collagen casings often found in sausage links.

NOT ANIMAL BASED

Identifies products that are clear alternatives to animal-derived products like meat and dairy

Label Claim Attributes

ORGANIC

Identifies the amount of certified organic ingredients in a product

NON-GMO

Identifies products with a label claim of or equivalent to “GMO Free”

Form Attributes

DEHYDRATED

Ingredients are cooked at a lower temperature using warm air to remove moisture without compromising natural nutrients and enzymes.

DRY

Ingredients are cooked at a high temperature to remove moisture content and may be extruded/baked (kibbles) or flaked.

HARD CHEW

Solid and crunchy texture requiring firm biting and chewing before swallowing.

MOIST

Ingredients have higher moisture content and may be sealed in cans, foil trays, or pouches.

SOFT CHEW

Semi-solid formulation requiring minimal chewing before swallowing.

Storage Type Attributes

REFRIGERATED

Must be stored at a low temperature to ensure safe consumption and maintain freshness.

SHELF STABLE

Packaged in a sealed container that can be safely stored at room temperature.