IndiePet
Independent & Neighborhood Pet Retail Association

SPINS®

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SPINS is the official Data Partner of IndiePet

INAUGURAL ISSUE

May 2021 | Period Ending April 2021

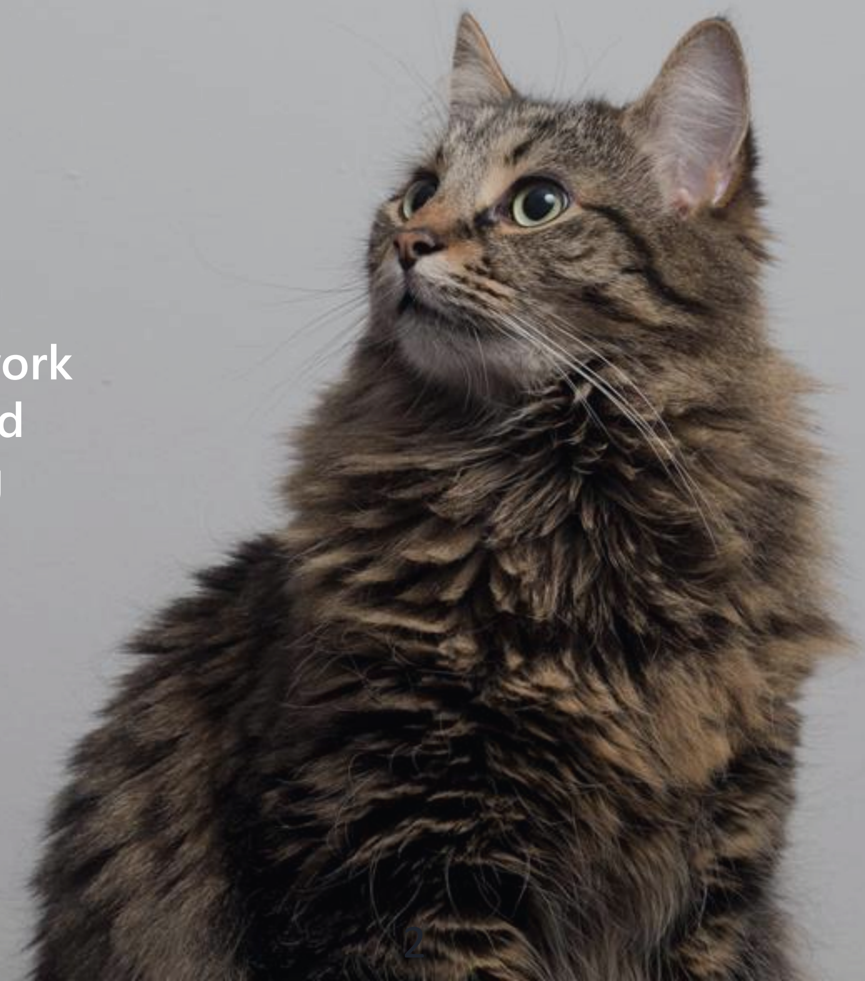
IndiePet

Independent & Neighborhood Pet Retail Association

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.



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IndiePet

Independent & Neighborhood
Pet Retail Association

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
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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.

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Join Us in the SPINS Neighborhood Pet Community of Over 1100 Stores

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The Independent & Neighborhood Pet Retail Association
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WOODLANDS PET FOOD & TREATS

Two Bostons The Store for Happy Pets™

BUCHHEIT Explore the Possibilities of a Simpler Life...

healthyspot

PETPROS EST. 1986

CHOICE PET

MAY 2021

Key Insights In This Issue

IndiePet
The Independent & Neighborhood Pet Retail Association
Member Insights powered by SPINS

What's Inside This Report

Data Parameters

Understanding where the data comes from.
What are channels and other data parameters?
Our hierarchy, categories and attribute groups.

What's Happening – The Reports

What's selling?
Where and Why?
What measures do we use?

What Matters – The Insights

What insights should I consider?
How am I performing compared to my competition?
What product innovations are there?

What You Can Do – Take Action

How do you differentiate your store?
What products should I offer?

DID YOU KNOW?

Look for this callout for interesting facts and ideas.

What's Inside This Report

RETAIL COVERAGE

SPINS securely aggregates POS data into channels that offer an encompassing view of sales while not exposing stores.

AVAILABLE IN SPINS

- CONVENTIONAL
- EXCLUSIVE TO SPINS
  - NEIGHBORHOOD PET
  - REGIONAL & INDEPENDENT GROCERY
  - NATURAL ENHANCED

PRODUCT INTELLIGENCE

SPINS gathers key data on individual items by UPC and overlays our exclusive attributes to identify underlying trends and shopper motivations.

- PACKAGE & PRODUCT
- EXCLUSIVE TO SPINS
  - CERTIFICATION
  - INGREDIENT
  - LABEL CLAIM
  - NUTRITION PANEL
  - POSITIONING

APPLICATIONS & INSIGHTS

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

EXCLUSIVE TO SPINS

- BUSINESS INTELLIGENCE TOOLS
- CATEGORY MANAGEMENT TOOLS
- GROWTH CONSULTING

The Data Parameters Behind Our Reports

IndiePet
The Independent & Neighborhood Pet Retail Association
Member Insights powered by SPINS

Retail Channels

NEIGHBORHOOD PET (PET)

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.

EXAMPLE RETAILERS: healthyspot, PetPros, Choice Pet

REGIONAL & INDEPENDENT GROCERY (RIG)

Traditional full format grocery stores with at least $2MM ACV, and less than 40% of UPC-coded sales from natural/organic/specialty products.

EXAMPLE RETAILERS: Busch's, Grocery Outlet Bargain Market, Harding's

CONVENTIONAL MULTI OUTLET (MULO)

A joint venture with IRI Worldwide comprised of over 105,000 retail locations spanning Grocery, Drug, Mass, Dollar, Military, and Club.

EXAMPLE RETAILERS: Walmart, Kroger, Albertsons

Products

Department, Category, Subcategory or Attribute

Positioning Groups

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.

Specialty & Wellness Positioning – Grouping products perceived as artisanal, premium, locally crafted, or products that stress "functionality", better-for-you or sustainability elements.

Conventional Positioning - Brands include those that have been recognized as the standard or iconic brands in mass food, drug and grocery outlets.

Timeframe

52 Weeks (Current & Yago)

Measures

Dollar Volume (Current & Yago)
Dollar Share
Growth Percentage (Unit and Dollar)

The Data Parameters

IndiePet
The Independent & Neighborhood Pet Retail Association
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DID YOU KNOW?

SPINS offers full store coverage by category and subcategory

- **Pet Department**
  - **Pet Treats**
    - Pet Treats Dog
    - Pet Treats Cat
    - Pet Treats Other
    - Pet Rawhides & Animal Chews
  - **Pet Food**
    - Pet Food Dog
    - Pet Food Cat
    - Pet Food Bird
    - Pet Food Other
    - Pet Food Reptile & Small Animal
    - Pet Food Fish
  - **Pet Care & Wellness**
    - Pet Flea & Tick & Insect Control
    - Pet Grooming & Bathing Supplies
    - Pet Medications & First Aid
    - Pet Vitamins & Supplements
  - **Pet Habitat & Travel & Other Supplies**
    - Pet Aquariums & Reptile Habitats
    - Pet Beds & Furniture
    - Pet Feeding Supplies
    - Pet Habitats, Containment & Travel
    - Pet Pond & Marine Supplies
    - Pet Supplies Other
  - **Pet Toys & Collars & Apparel**
    - Pet Toys
    - Pet Collars, Harnesses, & Leashes
    - Pet Apparel & Other Accessories
  - **Pet Waste Management**
    - Pet Litter & Bedding
    - Pet Waste Management Supplies

The SPINS Product Intelligence Behind Our Reports

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The Independent & Neighborhood Pet Retail Association
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SPINS product ingredient and package claim data are overlaid across the Neighborhood Pet channel data, creating all new insights.

PRODUCT BASICS

- ❑ SPINS Brand
- ❑ SPINS Company
- ❑ SPINS Item Description

PRODUCT CLASSIFICATIONS

- ❑ SPINS Category
- ❑ SPINS Department
- ❑ SPINS Positioning Group
  - ❑ Natural Positioning
  - ❑ Specialty & Wellness Positioning
  - ❑ Conventional Positioning
- ❑ SPINS Subcategory

NATURAL CLAIMS

- ❑ Labeled Organic (95-100%)
- ❑ Labeled Non-GMO
- ❑ Certified Non-GMO Project Verified

SOCIAL CONSCIOUSNESS CERT.

- ❑ Certified B Corporation

PRODUCT FACTS

- ❑ Age (puppy, senior, etc.)
- ❑ Form (wet, dry)
- ❑ Packaging Type
- ❑ Storage (frozen, refrigerated)

GENERAL INTOLERANCES

- ❑ Ingredient – Grain
- ❑ Labeled Grain Free
- ❑ Labeled Gluten Free

FUNCTIONAL INGREDIENTS

- ❑ Fish Oil Concentrate
- ❑ Flax Seed Oil
- ❑ Chia Seed/ Chia Oil
- ❑ CBD
- ❑ Glucosamine Chondroitin Combo
- ❑ Glucosamine
- ❑ Probiotic
- ❑ Chlorophyll / Chlorella
- ❑ Hemp Seed
- ❑ Pumpkin

PET WELLNESS INGREDIENTS

- ❑ Whole Beef
- ❑ Whole Buffalo
- ❑ Whole Chicken
- ❑ Whole Duck
- ❑ Whole Lamb
- ❑ Whole Salmon
- ❑ Whole Turkey

GUARANTEED ANALYSIS

- ❑ Crude Fat
- ❑ Crude Fiber
- ❑ Crude Moisture
- ❑ Crude Protein

DIETS

- ❑ Raw
- ❑ Animal Type

DID YOU KNOW?

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

SPINS

America Loves Pets

We all know how fast the pet market is changing, seemingly every day. With all the opportunity from new pet parents, there are new threats from big competition, both the big box stores and big internet players. This report will give you a look into the performance of

We will open this inaugural issue of the IndiePet Member Insights report **looking at the market as a whole, including key numbers on the new pet parent** and how they see natural foods for their pets.

This will set the stage for the Topline and Category reports that we will be bringing you in every issue.

America Loves Pets

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The Independent & Neighborhood Pet Retail Association
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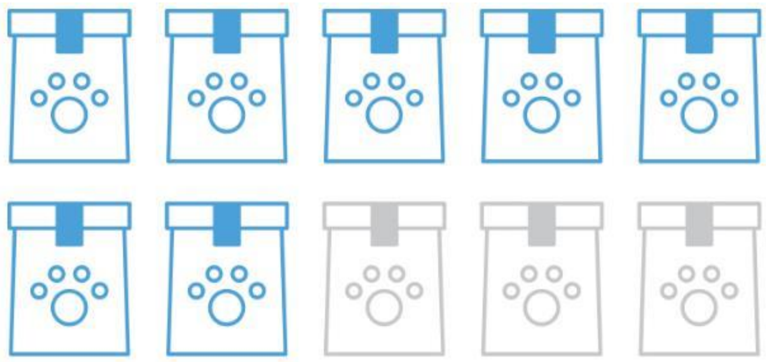
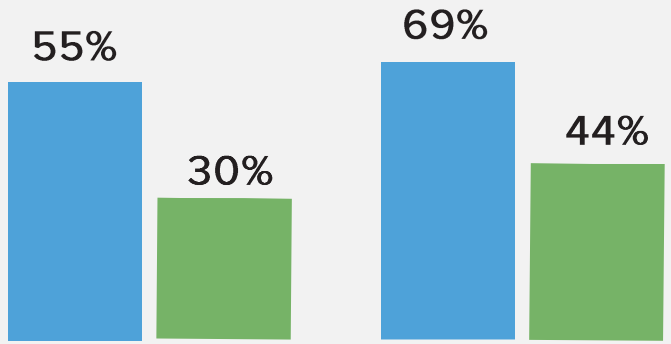


Nearly **7-in-10** households

Millennials accounted for
43%
of pet owner growth

$49B
Spent Annually On Pet Food, Treats, & Supplies

Thinking About Natural



Open to trying holistic and natural-branded nutritional pet supplements

Likely to consider foods with naturally-made ingredients

Millennial pet owners **Older pet owners**

Source: SPINS Neighborhood Pet Channel, IRI, and Statista

SPINS Topline Report

IndiePet
The Independent & Neighborhood Pet Retail Association
Member Insights powered by SPINS

What It Is:

The topline report is an overview of the current market trends in each of the 3 SPINS channels

- SPINS Neighborhood Pet Channel (PET)
- SPINS Regional Grocery (RIG)
- SPINS Conventional Channel (MULO)

The topline report will look at the latest 52-week period, we will roll up all categories and subcategories across SPINS Pet to a topline view.

What It Does:

Channel level view gives comparison across types of retailers: Pet Specialty, Conventional Multi-outlet, and Regional Grocery

Why It Matters:

You need a pulse on what is happening in other channels – so that you can compare your performance and build a strong strategy that will set you up to differentiate your store.

Cross-channel Growth Performance

Pet Parents are coming back to independent and neighborhood pet retailers!

SPINS Neighborhood Pet		SPINS Regional Grocery		SPINS Multi Outlet	
8.5% Unit Growth YoY	**2.8%** Dollar Growth YoY	**0.4%** Unit Growth YoY	**3.6%** Dollar Growth YoY	**-1.5%** Unit Growth YoY	**3.3%** Dollar Growth YoY

INSIGHTS

- ✓ SPINS Neighborhood Pet retailers bounced back in 2021, starting the year off strong with unit growth outpacing dollar growth YoY latest 52 weeks ending 4/18/21
    - ✓ Shoppers prioritized convenience and affordability last year, with customers returning to more Natural and Specialty & Wellness products in 2021
- ✓ RIG and MULO did not experience the same level of decline in 2020, with near flat unit growth and dollar growth just over 3%

DID YOU KNOW?

What are SPINS Channel definitions? CLICK HERE

SPINS Neighborhood Pet, SPINS Regional Grocery and Conventional Multi Outlet Channel (powered by IRI) 52 Weeks Ending 4/18/21

IndiePet Brands are Driving Growth

IndiePet
The Independent & Neighborhood Pet Retail Association
Member Insights powered by SPINS

SPINS Neighborhood Pet Channel: IndiePet Brands 52 Week YoY

+10.6%
Unit Growth

+3.3%
Dollar Growth

INDIEPET BRANDS

Boss Dog/Boss Cat Brands, Inc
Champion Pet Foods
Coastal Pet Products
Earth Animal Ventures, Inc
Earth Buddy Pet
Farmina Pet Food USA LC
FirstMate Pet Foods
Fluff & Tuff
Fromm Family Foods
Grandma Lucy's

Grizzly Pet Products
Health Extension Pet Care
inClover
Instinct Pet Food
Kaylor of Colorado
Kiwi Kitchens
Meyenberg Goat Milk
(Tailspring) MidWest Homes for Pets
Nature's Logic

NexPet-Grandma Maes Country Naturals
Nulo Pet Food, Inc
Open Farm
Petfive Brands LLC (dba Sustainability Yours)
Pets Global, Inc.
Primal Pet Foods
RAWZ Natural Pet Food
RC Pets

Redbarn Pet Products
Stella & Chewy's
Tall Tails
The Honest Kitchen
Treatibles
Tucker's
Tuffy's Pet Foods, Inc
Vetdiet
WellPet

SPINS

SPINS Pet Category Performance

IndiePet
The Independent & Neighborhood Pet Retail Association
Member Insights powered by SPINS

SPINS helps you understand what categories capture the dollar volume vs what categories are driving growth.
Compare your performance and make better assortment decisions.

- ✓ This section takes a deeper dive into the SPINS Neighborhood Pet Channel to highlight the trends within individual categories.
- ✓ We leverage key SPINS attributes for insights into shopper motivations within each category.
- ✓ Categories span both consumables (i.e. Food, Treats) and non-consumable (i.e. Care & Wellness) products.
- ✓ A 52-week snapshot gives a clear view of up-to-date trends and brands.

SPINS 52 WEEK NEIGHBORHOOD PET CATEGORIES

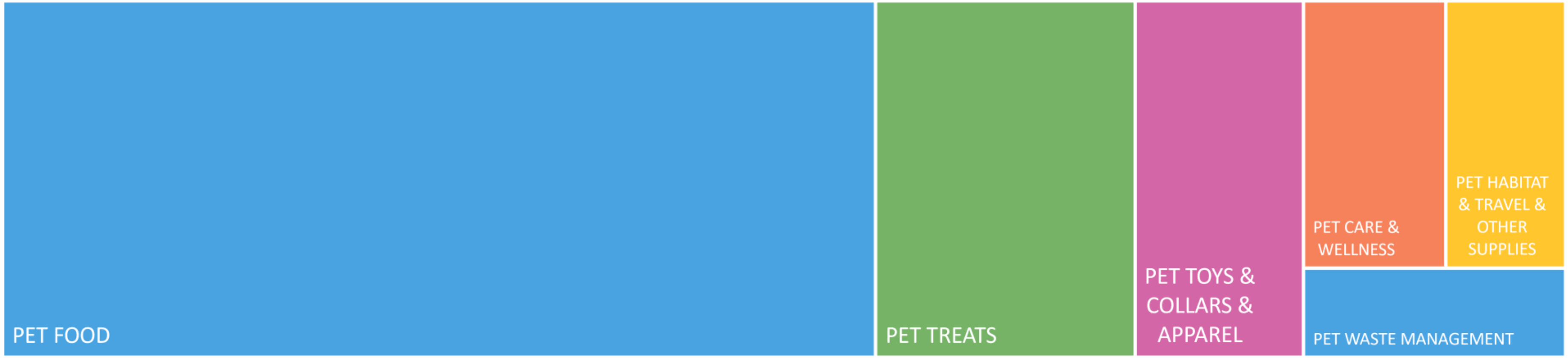
SPINS Pet Category Performance

IndiePet
The Independent & Neighborhood Pet Retail Association
Member Insights powered by SPINS

Let's breakdown the dollar volume by category for the past 52 weeks ending in April across SPINS Pet. SPINS will then showcase what categories are driving growth.

Food & Treats Continue to Drive the **Volume** Across SPINS Pet

DOLLAR VOLUME BY SPINS CATEGORIES



LEGEND

Category	$ Share
PET FOOD	55.9%
PET TREATS	16.6%
PET TOYS & COLLARS &...	10.8%
PET CARE & WELLNESS	6.8%
PET HABITAT & TRAVEL &...	5.7%
PET WASTE MANAGEMENT	4.2%

WHAT CATEGORIES ARE DRIVING GROWTH IN SPINS PET?

Hardgoods, Supplies, and Pet Care & Wellness are Driving Growth

% CHANGE VS YAGO

Pet Food	Pet Treats	Pet Toys, Collars, & Apparel	Pet Care & Wellness	Pet Habitat, Travel & Other Supplies	Pet Waste Management
-4.3%	+5.1%	+21.6%	+15.8%	+31.3%	+9.6%

Pet Food Category Performance

Pet Food
-4.3%
52wk YOY Total Category Growth

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The Independent & Neighborhood Pet Retail Association
Member Insights powered by SPINS

WHAT PET FOOD CATEGORIES HOLD WHAT SHARE?

Neighborhood Pet assortment is primarily made up of Dog and Cat Food, with <3% share in other subcategories

LEGEND	
Category	**$ Share**
PET FOOD DOG	78.7%
PET FOOD CAT	18.8%
PET FOOD REPTILE & SMALL ANIMAL	1.6%
PET FOOD OTHER	0.4%
PET FOOD BIRD	0.4%
PET FOOD FISH	0.2%

WHAT PET FOOD ATTRIBUTES ARE SHOWING THE MOST GROWTH?

Pet food growth is driven by trends in refrigerated/frozen, conventional and specialty products, and wet pet food

% CHANGE VS YAGO

Storage Type		Positioning Group		Age	Form		Labeled Organic
Shelf Stable	Refrigerated/ Frozen	Conventional	Specialty	Puppy/Kitten	Dry	Wet	Organic
-5.9%	+6.8%	+21.5%	+14.8%	+14.4%	-7.9%	+1.8%	-2.5%

SPINS 52 WEEK NEIGHBORHOOD PET CATEGORIES

Pet Treats Category Performance

Pet Treats **+5.1%** 52wk YOY Total Category Growth

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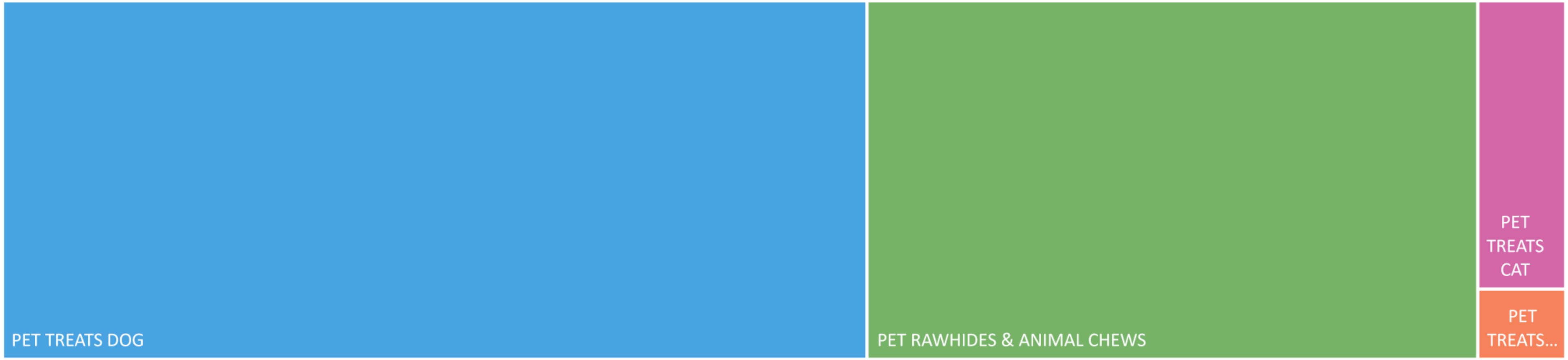
WHAT PET TREAT CATEGORIES HOLD WHAT SHARE?

Dog Treats and Rawhides & Animal Chews continue to drive volume in the Pet Treats category



LEGEND

Category	$ Share
PET TREATS DOG	55.3%
PET RAWHIDES & ANIMAL CHEWS	39.1%
PET TREATS CAT	4.5%
PET TREATS OTHER	1.1%

WHAT PET TREAT ATTRIBUTES ARE SHOWING THE MOST GROWTH?

Specialty & Wellness products, and Non-animal Based treats are driving growth in the subcategory

% CHANGE VS YAGO

Storage Type	Positioning Group		Animal Type		Form		
Shelf Stable	Conventional	Specialty/ Wellness	Beef	Not Animal Based	Hard Chew	Soft Chew	Dehydrated
+7.9%	+14.0%	+18.3%	+6.8%	+17.8%	+4.7%	+10.5%	+14.4%

SPINS 52 WEEK NEIGHBORHOOD PET CATEGORIES

Pet Toys, Collars, & Apparel Category Performance

Pet Toys, Collars, & Apparel

+21.6%

52wk YOY Total Category Growth

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The Independent & Neighborhood Pet Retail Association
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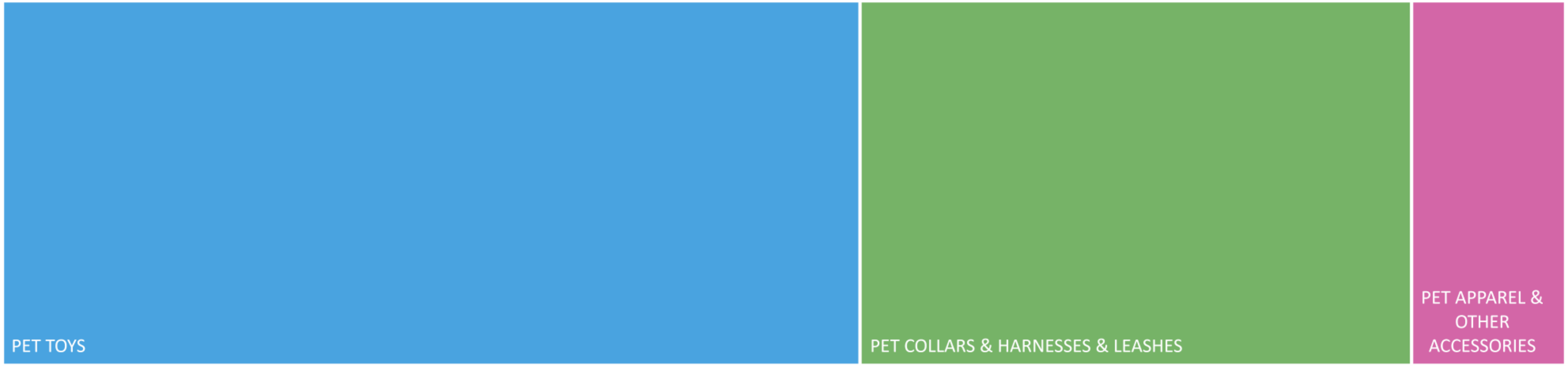
WHAT PET TOYS, COLLARS, & APPAREL CATEGORIES HOLD WHAT SHARE?

Hard goods in pet is split between Toys and Collars, with apparel making up <10% of the category



LEGEND

Category	$ Share
PET TOYS	54.9%
PET COLLARS & HARNESSES & LEASHES	35.3%
PET APPAREL & OTHER ACCESSORIES	9.8%

WHAT PET TOYS, COLLARS, & APPAREL ATTRIBUTES ARE SHOWING THE MOST GROWTH?

Category growth is concentrated in conventional and specialty & wellness positioning groups

% CHANGE VS YAGO

Positioning Group		
Conventional	Natural	Specialty/ Wellness
+22.5%	+12.3%	+17.5%

Pet Care & Wellness Performance

Pet Care & Wellness
+15.8%
52wk YOY Total Category Growth

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WHAT PET CARE & WELLNESS CATEGORIES HOLD WHAT SHARE?

Pet Care & Wellness volume driven by share in Vitamins & Supplements, Flea & Tick, and Grooming & Bathing Supplies

LEGEND

Category	$ Share
PET VITAMINS & SUPPLEMENTS	38.5%
PET FLEA & TICK & INSECT CONTROL	29.0%
PET GROOMING & BATHING SUPPLIES	24.9%
PET MEDICATIONS & FIRST AID	7.5%

WHAT PET CARE & WELLNESS ATTRIBUTES ARE SHOWING THE MOST GROWTH?

Growth in the category is driven by Conventional and Specialty/Wellness positioned brands, with trends in products that are Non-GMO and Organic

% CHANGE VS YAGO

Positioning Group			Labeled Non-GMO	Labeled Organic
Conventional	Natural	Specialty/ Wellness	Non-GMO	Organic
+21.4%	+9.8%	+21.3%	+11.5%	+6.4%

Pet Habitat, Travel, & Supplies Category Performance

Pet Habitat, Travel, & Supplies
+31.3%
52wk YOY Total Category Growth

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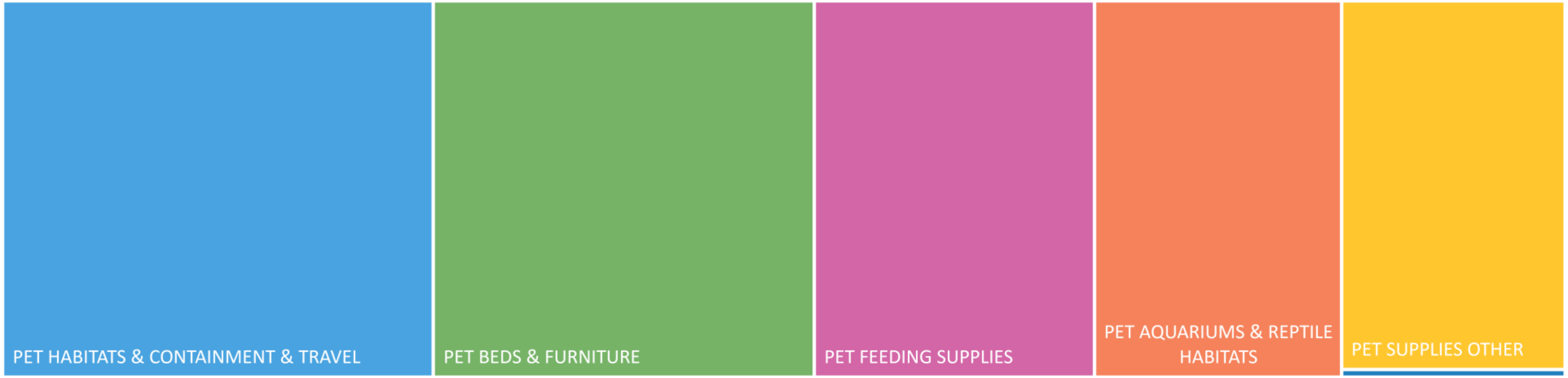
WHAT PET HABITAT, TRAVEL, & SUPPLIES CATEGORIES HOLD WHAT SHARE?

Habitats and Bed/Furniture account for >52% of overall volume in the category



LEGEND	
Category	$ Share
PET HABITATS & CONTAINMENT & TRAVEL	27.6%
PET BEDS & FURNITURE	24.4%
PET FEEDING SUPPLIES	17.9%
PET AQUARIUMS & REPTILE HABITATS	15.8%
PET SUPPLIES OTHER	14.0%
PET POND & MARINE SUPPLIES	0.3%

WHAT PET HABITAT, TRAVEL, & SUPPLIES ATTRIBUTES ARE SHOWING THE MOST GROWTH?

Conventional and Specialty & Wellness products are driving growth in the Pet Habitat category

% CHANGE VS YAGO

Positioning Group		
Conventional	Natural	Specialty/ Wellness
+32.4%	**+4.4%**	**+36.7%**

SPINS 52 WEEK NEIGHBORHOOD PET CATEGORIES

Pet Waste Management Performance

Pet Waste Management

+9.6%

52wk YOY Total Category Growth

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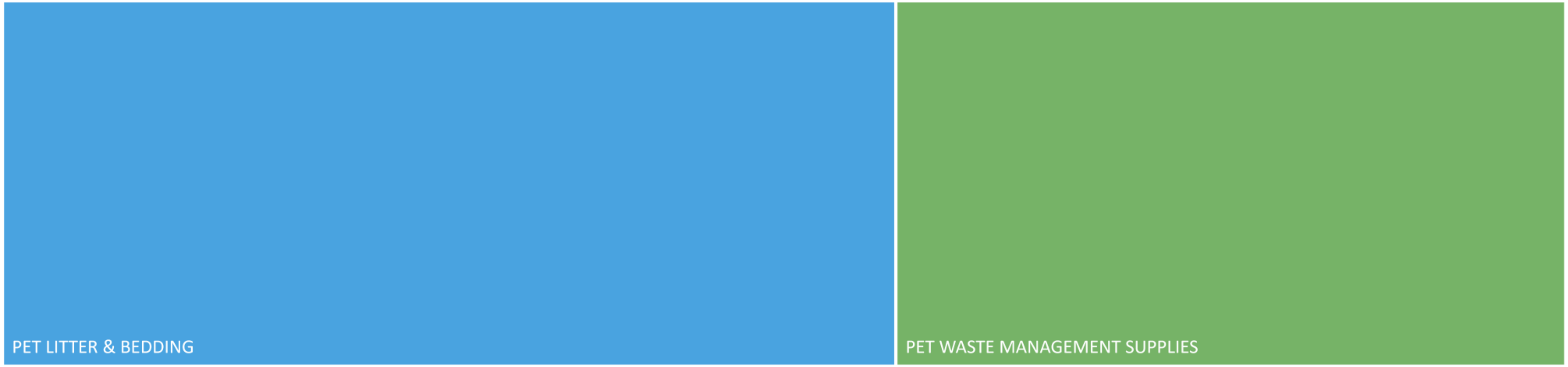
WHAT PET WASTE MANAGEMENT CATEGORIES HOLD WHAT SHARE?

Since rise in adoption rates in 2020 and continued stay at home protocols, waste management continues to experience growth



LEGEND	
Category	$ Share
PET LITTER & BEDDING	57.15%
PET WASTE MANAGEMENT SUPPLIES	42.85%

WHAT PET WASTE MANAGEMENT ATTRIBUTES ARE SHOWING THE MOST GROWTH?

Customers are looking for budget friendly products in the segment, with conventional products driving growth

% CHANGE VS YAGO

Positioning Group		
Conventional	Natural	Specialty/ Wellness
+22.9%	-9.6%	-7.1%

Key Category Insights

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The Independent & Neighborhood Pet Retail Association
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- ✓ In the latest 52 weeks, **Pet consumables continues to be the main driver in volume** in SPINS Pet
- ✓ Pet Food has had ups and downs since stock up LY, however, rebounding in 2021, with 52 week growth at -4.3%. The category is being driven by **new interest in frozen/refrigerated foods, and growth in puppy food due to adoption rate increases LY.**
- ✓ Owners are turning to more **conventional affordable pet food**, along with **specialty & wellness foods that adhere to a specific diet type**
- ✓ In Pet Treats, owners are turning to **non-animal based product selections** for their pets, with **peanut butter** as the main source of protein
- ✓ **Hard Goods, and Wellness categories are driving continued growth** in the channel since LY 2020
- ✓ With continued stay at home precautions to this point, **owners are buying more toys and accessories** for their pets to be entertained at home
- ✓ Care & Wellness doesn't stop with caring for ourselves, with owners purchasing more care & wellness products YoY for their pets. **Customers are looking for affordability, specialty & wellness (products geared for specific health focus ex joint health), non-GMO, and organic products in the Pet Care & Wellness categories.**
- ✓ Pet Habitat, Travel, & Supplies, and Waste Management continue to see growth YoY, concentrated in conventional affordable goods

Join the 1100 pet retail partners in the SPINS PET Community

WHY DID THEY JOIN SPINS?

1. Differentiate their assortment
   – from food, drug & mass retailers
2. Identify innovation as it launches
   – you will never be late again
3. SPINS was built for independents
   – our mission is to support your mission

WHAT WILL YOU GET WHEN YOU JOIN?

1. Actionable insights like we have shown here – now tailored to your assortment
2. Full access, SKU level insights for all categories, subcategories and our pet attributes
3. Full protection – no other retailer knows that you are a member of our community

SPINS®

Join for Free, Click Here

SPINS SPOTLIGHT

Get Ahead Of Flea & Tick Season

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With every IndiePet Member Insights Report, SPINS will spotlight one topic that should be of interest for all members. The spotlight helps you forecast and plan to best execute your strategy throughout the year. Keeping you informed and ahead of your competition is SPINS' most important commitment.

- ✓ In this issue, the spotlight is on the subcategory of Pet Flea & Tick & Insect Control.
- ✓ We all want the best for our pets, and the season for those pesky bugs is coming up!
- ✓ Flea & Tick control is a year-round category, with peak season focused on May through July when the weather is warmer.
- ✓ Do you have the right in-store assortment with trending products for customers ready to go?

Pet Department
- **Pet Treats**
  - Pet Treats Dog
  - Pet Treats Cat
  - Pet Treats Other
  - Pet Rawhides & Animal Chews
- **Pet Food**
  - Pet Food Dog
  - Pet Food Cat
  - Pet Food Bird
  - Pet Food Other
  - Pet Food Reptile & Small Animal
  - Pet Food Fish
- **Pet Care & Wellness**
  - Pet Flea & Tick & Insect Control
  - Pet Grooming & Bathing Supplies
  - Pet Medications & First Aid
  - Pet Vitamins & Supplements
- **Pet Habitat & Travel & Other Supplies**
  - Pet Aquariums & Reptile Habitats
  - Pet Beds & Furniture
  - Pet Feeding Supplies
  - Pet Habitats, Containment & Travel
  - Pet Pond & Marine Supplies
  - Pet Supplies Other
- **Pet Toys & Collars & Apparel**
  - Pet Toys
  - Pet Collars, Harnesses, & Leashes
  - Pet Apparel & Other Accessories
- **Pet Waste Management**
  - Pet Litter & Bedding
  - Pet Waste Management Supplies

Get Ahead Of Flea & Tick Season

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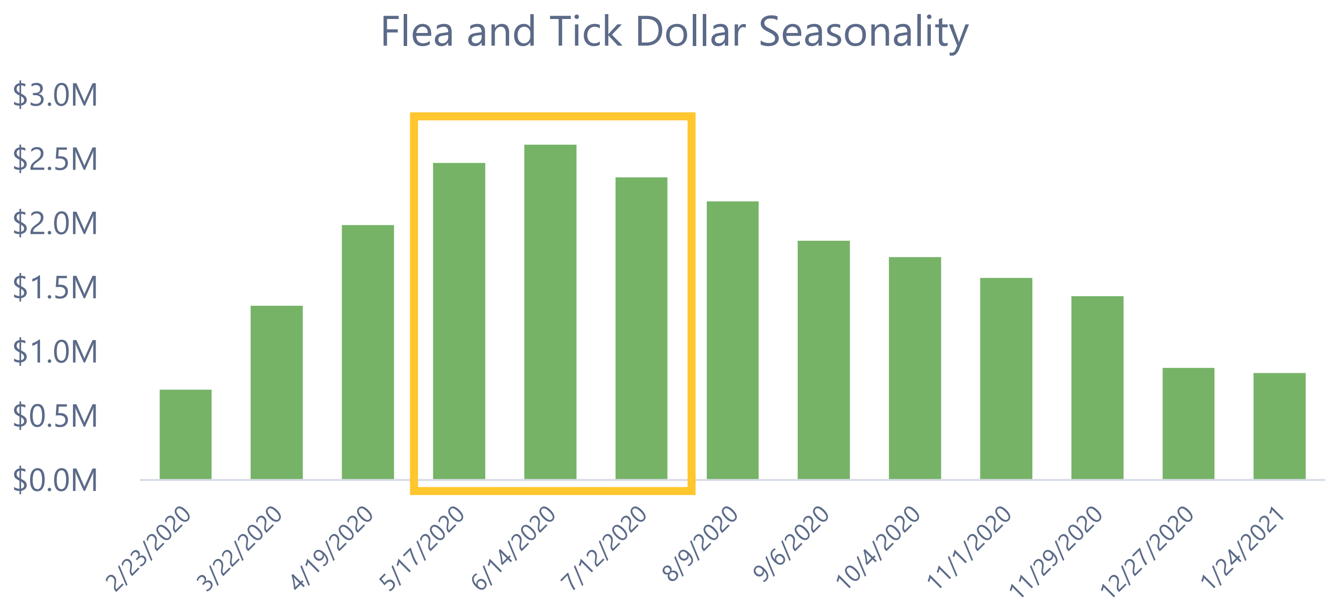
The Independent & Neighborhood Pet Retail Association
Member Insights powered by SPINS

INSIGHTS

- ✓ Flea and Tick is purchased all-year.
- ✓ Weather dictates growth in sales based off the need of these items.
- ✓ New owners in the market contributed to overall sales growth in 2020.

Peak Period Growth	Aggregated 52 Week Growth
+16.4%	+14.8%



SPINS Neighborhood Pet Channel
52 Weeks Ending 1/24/21

Leading Brands

INSIGHTS & ACTIONS

- ✓ Seresto, Advantage, and Frontline **together grew LY +16.9%,** better than the **overall Flea and Tick segment growth of 14.7%.**
- ✓ **Do you have the right products** to drive in-store growth in your assortment from growing brands?
- ✓ Recent articles published concerning **the adverse effects of pesticide related products** point to growth in the natural segment of the category.

66%

Share Of Channel Subcategory

Seresto

#1 Brand in the market for flea and tick in both $'s and Units

Non-Prescription based Collar

Dol$ Growth: +11.7%
Unit Growth: +12.2%
ARP: $58.37

Advantage II

Convenient, monthly topical solution

2 ingredients to target both adult and larvae flea and ticks

Dol$ Growth: +21.0%
Unit Growth: +26.6%
ARP: $40.48

Frontline Plus

Easy-to-apply monthly dosage

2 ingredients to target both adult and larvae flea and ticks

Dol$ Growth: +35.6%
Unit Growth: +35.8%
ARP: $42.51

‘Natural Standard’ Brands Driving Growth

IndiePet
The Independent & Neighborhood Pet Retail Association
Member Insights powered by SPINS

INSIGHTS & ACTIONS

- ✓ With recent news around the adverse effects of pesticide related products, owners will turn to natural, ‘better for you’ alternatives for flea and tick care.
- ✓ No chemicals that may induce adverse reactions to pets.
- ✓ Natural products use a base of essential oils, no artificial colors, no insecticides, EPA approved.
- ✓ Do you have the right products to drive in-store growth in your assortment from growing brands?

Tropiclean

- 100% Organic
- Non-Toxic
- Non-GMO
- Vegan & Cruelty Free
- Nothing Artificial

Mad About Organics

- Citronella Oil, Lemongrass Oil, Peppermint Oil
- No artificial colors or preservatives

Earth Animal

- No DEET, synthetic chemicals, insecticides

Source: SPINS Neighborhood Pet Channel

Key Spotlight Insights

- ✓ Flea and Tick care is a year-round category, with **peak season coming between May and July.**
- ✓ With the increase in adoption rates in 2020, Flea and Tick care enjoyed healthy **growth of 14.8% in 52 weeks YoY.**
- ✓ The **top 3 brands hold 66% of total category share**: Seresto, Advantage II, and Frontline Plus.
- ✓ Due to recent news articles around the use of insecticides and the adverse effects on pets, **owners will be looking for natural substitutes**. *Please urge your customers to read the label for ingredients.*
- ✓ **Natural positioned brands use a base of essential oils**, devoid of chemicals.

Actions to Consider

WHAT'S INSIDE THIS REPORT

Pg 7

SPINS gathers, organizes and delivers data tailored just for independent pet retailers. As an Independent Pet Retailer, you can join and have access to this partnership for free.

WE LOVE PETS

Pg 12

7 in 10 households own a pet and 43% of Millenials are pet parents, are you meeting the needs of today's shopper?

TOPLINE REPORT

Pg 14

SPINS Neighborhood Pet reatilers bounced back in 2021, starting the year off strong with unit growth outpacing dollar growth year over year for the last 52 weeks.

SPINS CATEGORY INSIGHTS

Pg 17

Pet Food (dog and cat) had begun to recover in early 2021, with treats and non-food continuing to drive growth in the pet segment.

SPINS SPOTLIGHT

Pg 27

Flea and Tick Care peaks during May – July, with owners looking for natural, and 'better for you' alternatives.

JOIN SPINS PET

Pg 33

Become a SPINS Retail Partner and make your business and the pet community stronger!

We want your feedback!

- What did you find useful?
- What data would you hope to see in our next report?

Complete the Survey

IndiePet

Independent & Neighborhood
Pet Retail Association


3 Ways to Win with SPINS
1 Understand your performance
2 Differentiate your assortment – from food, drug & mass retailers
3 Identify innovation as it launches – you will never be late again
Join for Free, Click Here
SPINS®

Appendix

APPENDIX

Definitions

IndiePet
The Independent & Neighborhood Pet Retail Association
Member Insights powered by SPINS

Brand Positioning

Example Brands:

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

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.

Definitions

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”

Definitions

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.

