



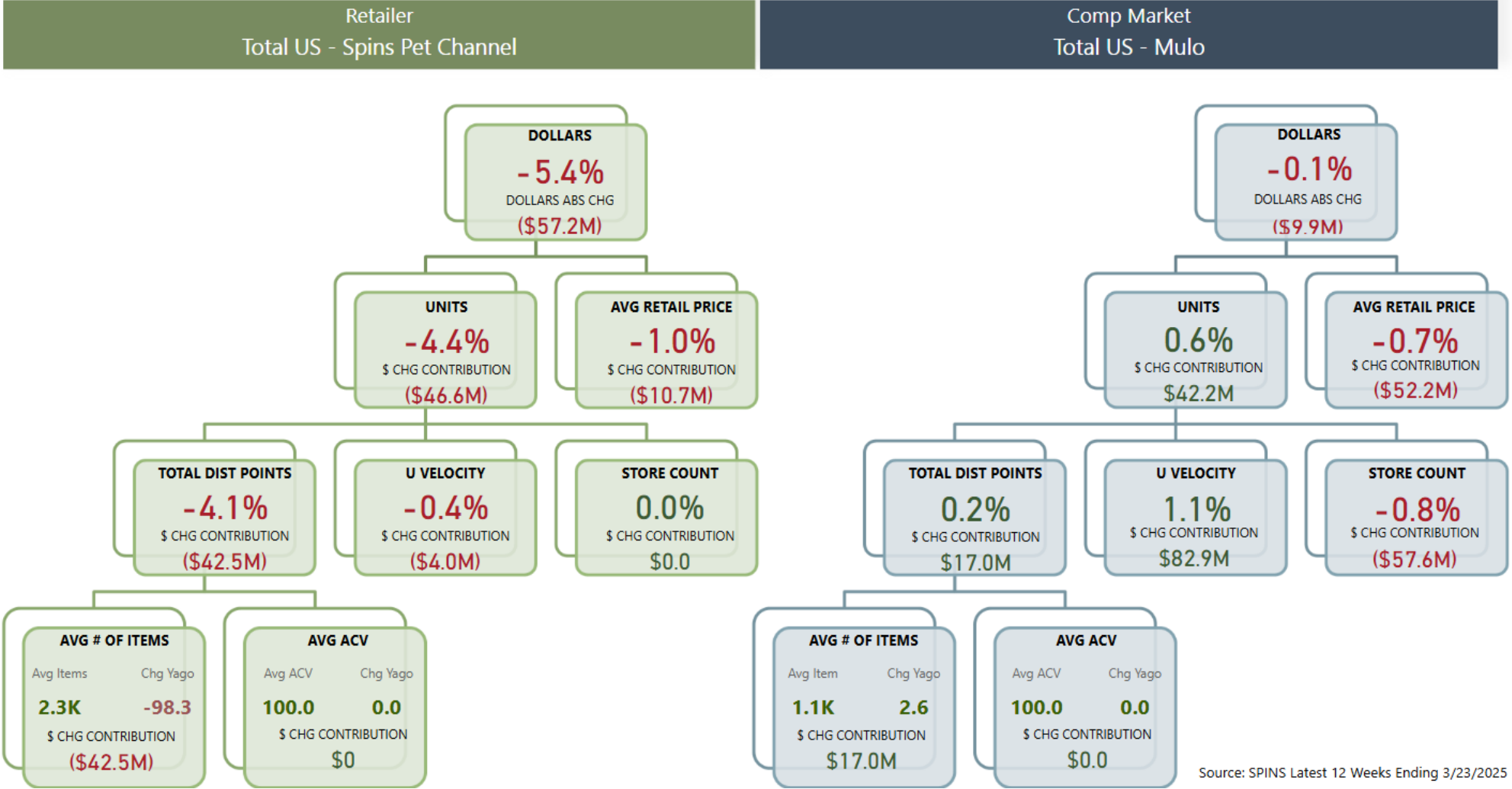
Q1 IndiePet Insights

Created By:

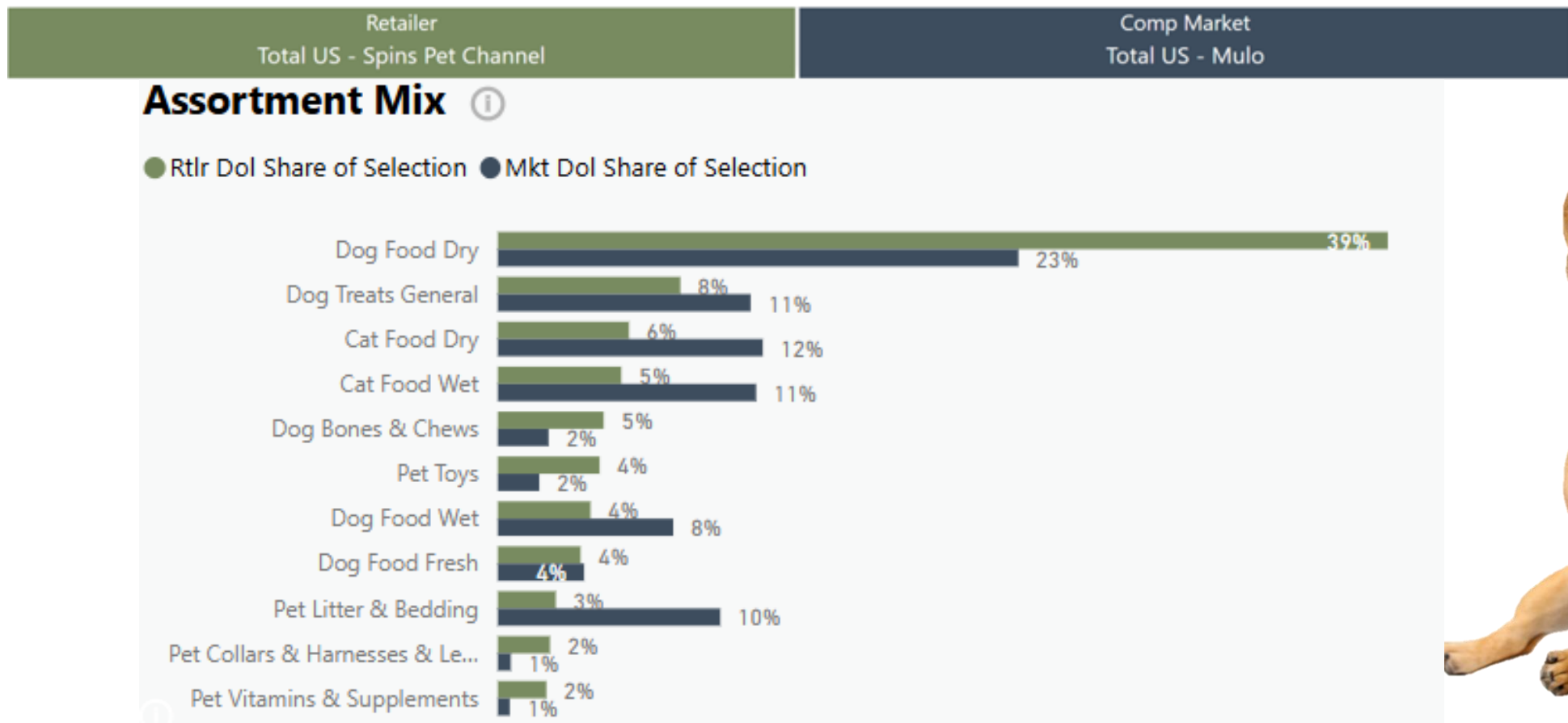
SPINS Retail Insights Team



How's Pet Doing in 2025?



How Do Indies' Assortments Compare?



Subcategories Driving Growth & Declines – SPINS Pet

Growing Subcategories

Subcategory	Rtlr Dol Share	Rtlr Dol +/- Chg Yago	Rtlr Growth Contr
Cat Food Wet	5%	\$1,486,617	25%
Pet Food Bird	1%	\$1,310,345	22%
Cat Food Dry	6%	\$836,388	14%
Cat Treats General	1%	\$742,923	12%
Dog Treats Other	0%	\$727,372	12%
Pet Food Fish	0%	\$459,645	8%
Pet Food Other	1%	\$236,451	4%
Pet Treats Other	0%	\$77,204	1%
Pet Pond & Marine Supplies	0%	\$57,517	1%
Cat Food Toppers & Mixers	0%	\$44,432	1%



Declining Subcategories

Subcategory	Rtlr Dol Share	Rtlr Dol +/- Chg Yago	Rtlr Growth Contr	Rtlr Decline Contr
Dog Food Dry	39%	(\$27,459,789)		43%
Pet Collars & Harnesses & ...	2%	(\$4,237,852)		7%
Dog Bones & Chews	5%	(\$3,556,474)		6%
Dog Rawhide & Rawhide A...	2%	(\$3,546,247)		6%
Dog Treats General	8%	(\$3,236,772)		5%
Pet Habitats & Containmen...	1%	(\$2,730,284)		4%
Pet Toys	4%	(\$1,871,768)		3%
Pet Beds & Furniture	1%	(\$1,699,574)		3%
Pet Grooming & Bathing S...	1%	(\$1,663,380)		3%

Brands Driving Growth & Declines

Growing Brands

Rtlr Brand Rank	brand	Rtlr Dol Share	Rtlr Dol % Chg vs Yago	Rtlr Dol +/- Chg Yago	Rtlr Growth Contribution
7	Open Farm	3.59%	15.6%	\$4,009,432	18.41%
42	Victor	0.40%	62.6%	\$1,270,695	5.83%
20	Redbarn Pet Products	1.16%	11.0%	\$947,037	4.35%
23	Pure Vita	0.87%	14.6%	\$911,683	4.19%
73	Natures Window	0.21%	48.7%	\$579,339	2.66%
102	Petlou	0.13%	89.6%	\$507,531	2.33%
65	Inaba	0.27%	29.0%	\$496,104	2.28%
52	Bocces Bakery	0.32%	18.4%	\$418,058	1.92%
195	Pet Pals	0.05%	1123.0%	\$405,784	1.86%
64	Multipet	0.28%	20.8%	\$393,688	1.81%

Declining Brands

Rtlr Brand Rank	brand	Rtlr Dol Share	Rtlr Dol % Chg vs Yago	Rtlr Dol +/- Chg Yago	Rtlr Decline Contribution
8	Taste Of The Wild	2.45%	-16.5%	(\$4,825,413)	4.60%
6	Private Label	3.43%	-10.8%	(\$4,154,129)	3.96%
5	Stella & Chewys	3.45%	-9.0%	(\$3,433,417)	3.27%
2	Hills Science Diet	4.95%	-5.2%	(\$2,735,277)	2.61%
18	Earth Animal	1.01%	-20.8%	(\$2,653,356)	2.53%
4	Purina	4.23%	-5.8%	(\$2,594,191)	2.47%
36	Merrick Petfoods	0.55%	-30.7%	(\$2,451,376)	2.34%
12	Blue Buffalo	1.42%	-14.4%	(\$2,385,573)	2.27%
10	Primal Pet Foods	1.49%	-13.3%	(\$2,289,212)	2.18%
19	Coastal	0.97%	-18.3%	(\$2,178,120)	2.08%



Top 30 Items in the SPINS Pet Channel

upc	Items	Brand	Subcategory	Rtlr Dollars	Rtlr Dol % Chg vs Yago	Rtlr Unit % Chg vs Yago	Rtlr ARP
00-73893-26010	Nutri Source Chicken Rice Dog Food 416 Oz	Nutri Source	Dog Food Dry	\$5,806,936	-2.4%	-2.1%	\$58.17
00-72705-11521	Fromm Gold Adult Dog Food 528 Oz	Fromm	Dog Food Dry	\$4,250,129	-5.2%	-4.2%	\$56.24
00-72705-11531	Fromm Gold Large Breed Adult 528 Oz	Fromm	Dog Food Dry	\$3,595,681	-6.7%	-6.0%	\$56.13
00-73893-26102	Nutri Source Larg Breed Chckn Rc Dg Fd 416 Oz	Nutri Source	Dog Food Dry	\$2,732,953	-9.3%	-8.1%	\$57.96
00-74198-61393	Taste Of The Wild Dry Salmon Dog Food Piece 28lb	Taste Of The Wild	Dog Food Dry	\$3,362,760	-16.3%	-14.8%	\$57.11
00-74198-61395	Taste Of The Wild Dry Bison And Brown Rice Recipe ...	Taste Of The Wild	Dog Food Dry	\$3,200,320	-14.5%	-12.9%	\$57.12
00-38100-17552	Purina Pro Plan Dry Salmon And Rice Dog Food 30lb	Purina	Dog Food Dry	\$3,072,431	-1.8%	-2.6%	\$74.24
00-64992-10325	Orijen Dry Chicken And Turkey Dog Food Piece 25lb	Orijen	Dog Food Dry	\$2,605,551	-10.1%	-11.7%	\$99.86
00-38100-13059	Purina Pro Plan Dry Chicken And Rice Dog Food Pie...	Purina Pro Plan	Dog Food Dry	\$2,343,980	-4.6%	-4.7%	\$70.85
00-73893-26806	Nutri Source Beef Rice Dog Food 416 Oz	Nutri Source	Dog Food Dry	\$2,251,863	6.2%	7.7%	\$62.59
00-52742-01601	Hills Science Diet Dry Chicken And Barley Dog Food...	Hills Science Diet	Dog Food Dry	\$1,330,990	-2.5%	-2.3%	\$80.86
00-73893-26605	Nutri Source Lamb Rice Dog Food 416 Oz	Nutri Source	Dog Food Dry	\$2,152,768	17.9%	19.6%	\$61.84
00-72705-11611	Fromm Chicken A La Veg Dog Food 480 Oz	Fromm	Dog Food Dry	\$2,107,415	-5.9%	-5.4%	\$59.74
00-52742-88390	Hills Science Diet Sensitive Stomach Dry Dog Food ...	Hills Science Diet	Dog Food Dry	\$1,941,723	-4.7%	-5.3%	\$84.25
00-38100-17545	Purina Pro Plan Dry Salmon And Rice Dog Food 16lb	Purina	Dog Food Dry	\$1,855,281	3.7%	5.3%	\$55.14
00-74198-61384	Diamond Naturals Dry Sweet Potato And Salmon D...	Diamond Naturals	Dog Food Dry	\$1,780,594	18.3%	22.0%	\$44.50
00-72705-11401	Fromm 4 Star Pork And Applesauce Recipe 416oz	Fromm	Dog Food Dry	\$1,655,290	8.0%	8.0%	\$61.27
00-74198-60817	Diamond Dry Lamb Rice Turkey Dog Food 40lb	Diamond Naturals	Dog Food Dry	\$1,635,710	-14.7%	-12.2%	\$43.27
00-72705-11641	Fromm Salmon A La Veg Dog Food 416 Oz	Fromm	Dog Food Dry	\$1,604,754	3.4%	3.3%	\$67.55
00-64992-10525	Orijen Dry Dog Food Piece 25lb	Orijen	Dog Food Dry	\$1,588,353	-11.4%	-13.3%	\$122.95
00-74198-61397	Taste Of The Wild Dry Sierra Mountain Canine Form...	Taste Of The Wild	Dog Food Dry	\$1,592,638	-19.1%	-17.7%	\$57.33
00-73893-26910	Nutri Source Trout Brown Rice Dog Food 416 Oz	Nutri Source	Dog Food Dry	\$1,557,246	4.6%	6.6%	\$62.26
06-83547-12541	Open Farm Salmon & Ancient Grains Dg Fd 352oz	Open Farm	Dog Food Dry	\$1,532,880	15.6%	13.8%	\$82.12
00-72705-11621	Fromm Four Star Duck A La Veg Dog Food 528oz	Fromm	Dog Food Dry	\$1,506,776	0.5%	1.1%	\$64.38
01-86011-00153	Stella & Chewys Dry Assorted Flavor And Scent Dog...	Stella & Chewys	Dog Food Dry	\$1,320,568	-3.3%	-5.2%	\$95.94
00-74198-61451	Totwl Dry Dgfd Kibl 28lb	Taste Of The Wild	Dog Food Dry	\$1,479,785	0.0%	1.4%	\$57.60
00-38100-13051	Purina Pro Plan Savor Dry Beef And Rice Dog Food ...	Purina Pro Plan	Dog Food Dry	\$1,441,439	13.0%	12.5%	\$71.48
00-72705-11523	Fromm Dry Dog Food 15lb	Fromm	Dog Food Dry	\$1,357,490	-4.0%	-2.8%	\$31.54



Assortment Product Positioning



Retailer	Comp Market
Total US - Spins Pet Channel	Total US - Mulo

Natural		Specialty & Wellness		Conventional	
-5.0%	1.8%	-3.6%	-0.8%	-6.4%	-0.5%
Rtlr Dol % Chg vs Yago	Mkt Dol % Chg vs Yago	Rtlr Dol % Chg vs Yago	Mkt Dol % Chg vs Yago	Rtlr Dol % Chg vs Yago	Mkt Dol % Chg vs Yago
+/- Chg Yago (\$30M)	+/- Chg vs Yago \$20M	+/- Chg Yago (\$4M)	+/- Chg vs Yago (\$751K)	+/- Chg Yago (\$19M)	+/- Chg vs Yago (\$28M)



Top 10 Items: Natural Items (Select a positioning group in the stacked bar chart above to filter this table by product)

Positioning Group	UPC	Description	Brand	Subcategory
☐ Conventional ...	06-27975-01...	Freshpet Select Roasted Meals Chicken Carrot And S...	Freshpet	Dog Food Fresh
☒ Natural Positi...	08-51893-00...	Freshpet Select Chicken Vegetable Rice Dog Food 96oz	Freshpet	Dog Food Fresh
☐ Specialty & W...	08-51893-00...	Freshpet Select Beef Vegetable Rice Dog Food 96oz	Freshpet	Dog Food Fresh
	06-27975-01...	Freshpet Select Fresh From The Kitchen Home Cooke...	Freshpet	Dog Food Fresh
	08-59610-00...	Blue Life Protection Formula Dry Chicken And Brown ...	Blue Buffalo	Dog Food Dry
	06-27975-01...	Freshpet Select Roasted Meals Chicken Carrot And S...	Freshpet	Dog Food Fresh
	08-40243-13...	Blue Life Protection Formula Dry Dog Food 38lb	Blue Buffalo	Dog Food Dry
	06-27975-01...	Freshpet Select Chicken With Garden Vegetables And...	Freshpet	Dog Food Fresh
	08-40243-12...	Blue Buffalo Chkn Brwn Rc Life Prt Frm 384 Oz	Blue Buffalo	Dog Food Dry