







YoY MULO Growth for Sustainable Products Based on Label Claims With and Without ROC™ Inclusion

+22%

Regenerative Organic
Certified®

+6.6%

Certified Organic

+9.8%

Certified Organic + ROC™

+10.7%

Labeled Fair Trade

+13.9%

Labeled Fair Trade + ROC™

+4.9%

Certified Non GMO

+30.8%

Certified Non GMO +
ROC™

+2.4%

Certified B Corporation

+2.4%

Certified B Corporation +
ROC™

Sustainable Products Show Mixed Results

Consumers are buying sustainable products-but not uniformly. However, when looking at units, Labeled Grass Fed, Labeled Pasture Raised and Regenerative Organic Certified® are seeing strong unit growth

+12% U | \$170M

Regenerative Organic
Certified®

+25% U | \$2B

Labeled Grass Fed

+19% U | \$2B

Labeled Pasture Raised

+9% U | \$3B

Labeled Animal Welfare

+9% U | \$836M

Certified Detox Project -
Glyphosate Residue Free

+5% U | \$7B

Labeled No Antibiotics
Added

+2% U | \$44B

Certified Non-GMO Project
Verified

+1% U | \$32B

Labeled Organic

+0% U | \$66M

Certified Upcycled

-1% U | \$14B

Certified B Corp

-11% U | \$70M

Certified Fair Trade USA

-14% U | \$828M

Certified Plant Based Foods
Association



Retailer

Total US - Natural Expanded Channel

Comp Market

Total US - Mulo

Source: SPINS Satori Latest 52 Weeks Ending 3/22/2026

Rtlr Dollars

\$89M



Rtlr Units

12M



Rtlr ARP

\$7.32



Rtlr Dollars, % Promo

29.7%



Rtlr Avg Items

50



18.7%

14.0%

% Chg vs Yago

14.8%

11.8%

% Chg vs Yago

3.4%

1.9%

% Chg vs Yago

11.4%

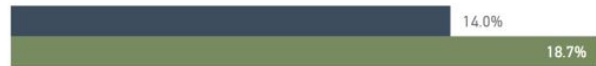
23.6%

% Chg vs Yago

7

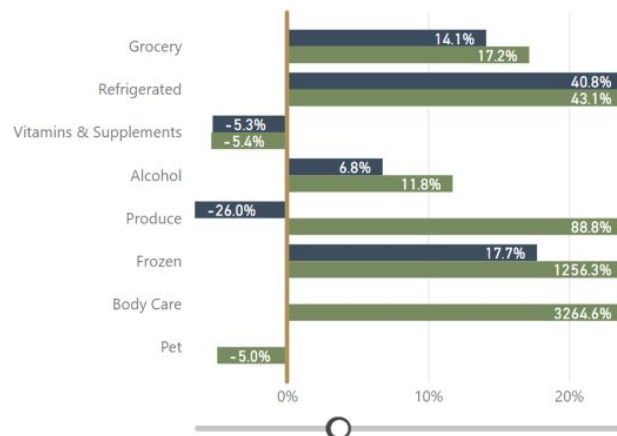
+/- Chg vs Yago

Total Store: Dollar % Chg vs Yago



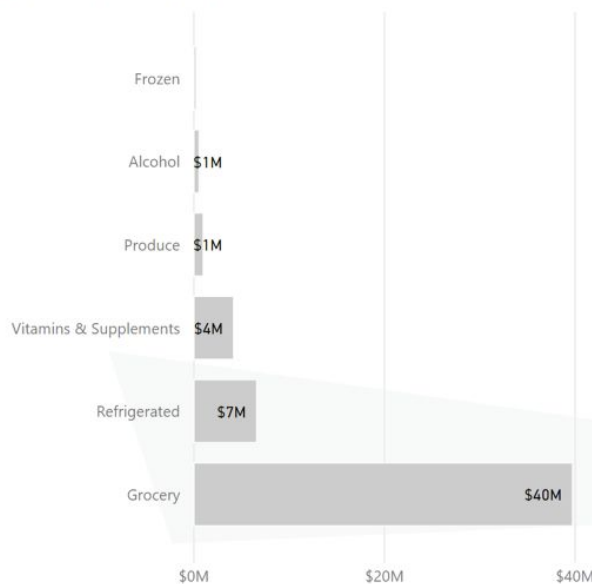
Dollar % Chg vs Yago

● Mkt Dol % Chg vs Yago ● Rtlr Dol % Chg vs Yago



Opportunity Dollars by Department

Fair Share of Market Goal: 29.9



Top Companies Contributing to Dollar Growth

Company	% Contribution to Growth
Jovial Foods Inc	15.0%
Heirloom Coffee Roasters	12.5%
Navitas Organics	10.9%
Lundberg Family Farms	9.9%
The Origin Milk Co	8.7%
Willow Wood Partners One Llc	4.9%
Guayaki Sustainable Rainforest Products	4.7%
Silver Mountain Packing	3.2%
Simpli	2.5%
Big Picture Foods	2.4%
Alexandre Family Farm	2.3%
Wild West Chocolate Llc	2.1%
Made In Nature Llc	1.8%
Baby Life Llc	1.8%
Continental Sausage Inc	1.6%
Pachamama Coffee Coop	1.6%
Groundwork Coffee Co	1.5%
Wellful Inc	1.1%
Betterful	0.8%
Recoup Beverage Inc.	0.8%
Frontier Natural Products Co Op	0.8%
Domaine Bousquet	0.7%
Adams Group	0.7%
Maic Chocolate	0.7%



Regenerative
Organic
Certified®

THE ACCESSIBILITY Pyramid

Understanding where we are and
when we'll get there.

Pathways for growing accessibility
and awareness of ROC.

