CONFIDENTIAL MARKET BRIEF

Brand Competitive Position Report: Northern Lights Botanicals

MARKET	STORE	GENERATED
~50 mile market	Northern Lights Botanicals (brand account)	Jun 9, 2026

Report Scope

STORE / ACCOUNT	MARKET RADIUS
Northern Lights Botanicals (brand account)	~50 mile market
COMPETITOR COUNT	**DATA WINDOW**
16	Last 30 days for price moves; latest menu check for shelf presence and product coverage.

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Executive Summary

- Northern Lights Botanicals appears in 12 of 28 stores in the selected market, a 43% shelf presence read.
- The strongest observed product is Northern Lights OG 1/8 oz, carried in 18 stores with a median market price of $38.
- High Plains Extracts is the most visible comparable brand in this category set, showing in 19 market stores.
- Sapphire City Cannabis is the strongest retailer target because it carries 14 comparable products but does not currently show Northern Lights Botanicals.
- 10 recent price movements were observed for Northern Lights Botanicals; review these before account outreach or pricing guidance.
- Use this report to compare category visibility and pricing posture against competing brands in the selected market.

Decision Brief

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DECISION QUESTION

How visible is the brand versus comparable category competitors?

COMMERCIAL READ

Northern Lights Botanicals has 43% shelf presence; High Plains Extracts is the most visible comparable brand in this category set.

RECOMMENDATION

Use comparable brand visibility and product footprint to decide whether the brand needs pricing support, assortment expansion, or account-level sales

CONFIDENCE

High - broad market set with multiple independent signals.

Exhibits

Exhibit 1 - Shelf depth by account

Stores currently showing the brand, ranked by observed product count.



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Exhibit 2 - Product footprint

Top observed products by store count across the current data set.

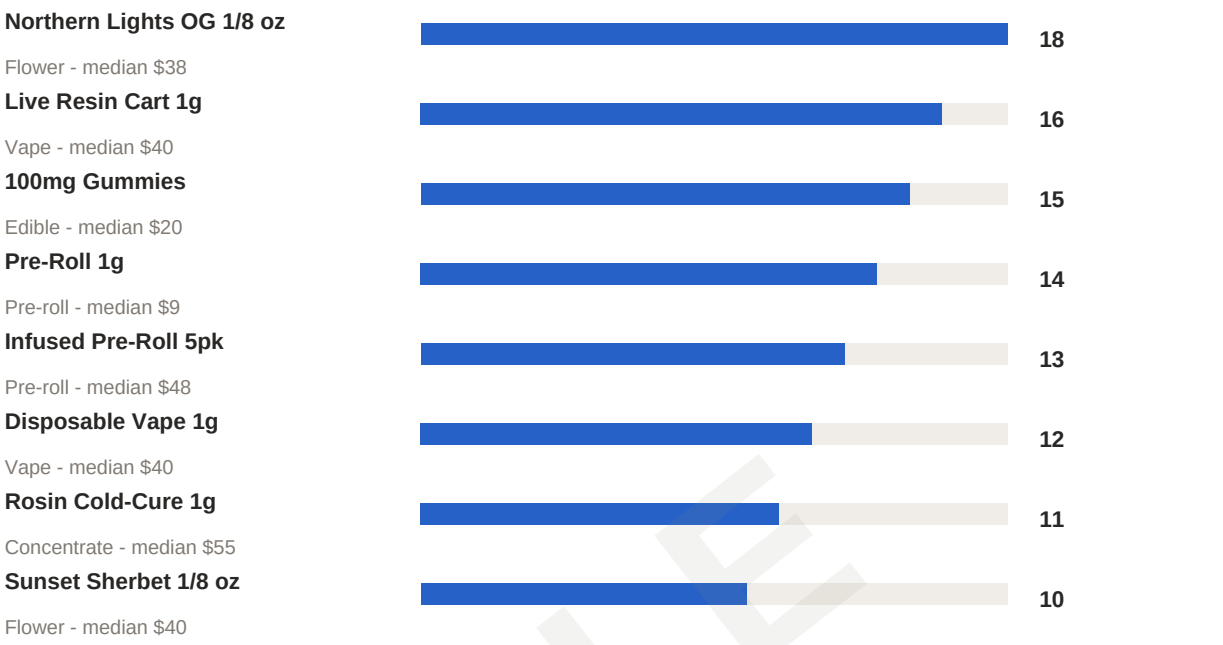

Exhibit 3 - Comparable brand pressure

Brands competing in the same category set, ranked by visible market reach.

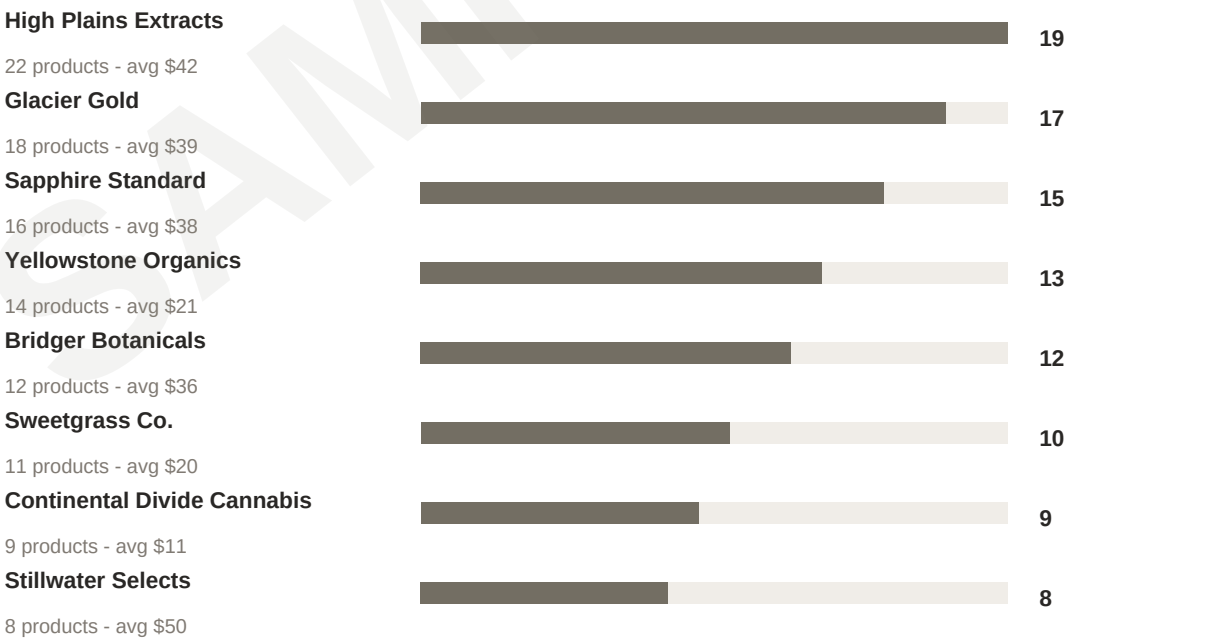

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Exhibit 4 - White-space accounts

COMPARABLE SKUS

Retailers carrying comparable products but not the brand. Market store count: 28.



Recommended Action Plan

P1

Benchmark against High Plains Extracts

Why: High Plains Extracts appears in 19 market stores with 22 comparable products.

Action: Compare SKU count, price ladder, category role, and account overlap before changing pricing or sales priorities.

Watchout: Comparable shelf presence can reflect distribution strategy, not necessarily consumer pull.

P2

Benchmark against Glacier Gold

Why: Glacier Gold appears in 17 market stores with 18 comparable products.

Action: Compare SKU count, price ladder, category role, and account overlap before changing pricing or sales priorities.

Watchout: Comparable shelf presence can reflect distribution strategy, not necessarily consumer pull.

P3

Benchmark against Sapphire Standard

Why: Sapphire Standard appears in 15 market stores with 16 comparable products.

Action: Compare SKU count, price ladder, category role, and account overlap before changing pricing or sales priorities.

Watchout: Comparable shelf presence can reflect distribution strategy, not necessarily consumer pull.

P4

Expand into Sapphire City Cannabis

Why: Sapphire City Cannabis already carries 14 comparable products.

Action: Prepare a category-specific pitch using the products and price tiers already visible on that menu.

Watchout: Prioritize stores where you can support sell-through, not just placement.

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P5

Expand into Headframe Holistics

Why: Headframe Holistics already carries 12 comparable products.

Action: Prepare a category-specific pitch using the products and price tiers already visible on that menu.

Watchout: Prioritize stores where you can support sell-through, not just placement.

P6

Expand into Gallatin Valley Greens

Why: Gallatin Valley Greens already carries 11 comparable products.

Action: Prepare a category-specific pitch using the products and price tiers already visible on that menu.

Watchout: Prioritize stores where you can support sell-through, not just placement.

Analyst Notes

Competitive positioning thesis

Northern Lights Botanicals has 43% visible shelf presence in ~50 mile market. Comparable brands show where the category is already crowded and where pricing support may matter.

- High Plains Extracts: 19 stores, 22 products, average observed price $42.
- Glacier Gold: 17 stores, 18 products, average observed price $39.
- Sapphire Standard: 15 stores, 16 products, average observed price $38.
- Yellowstone Organics: 13 stores, 14 products, average observed price $21.
- Bridger Botanicals: 12 stores, 12 products, average observed price $36.
- Sweetgrass Co.: 10 stores, 11 products, average observed price $20.

Pricing and movement context

Recent price movement can indicate promotional pressure, clearance behavior, or category resets.

- Glacier Greens: Live Resin Cart 1g raised 7% on 2026-06-07.
- Copper Mountain Cannabis: 100mg Gummies cut 15% on 2026-06-06.
- Garden City Cannabis: Northern Lights OG 1/8 oz cut 8% on 2026-06-05.
- Big Sky Botanicals: Rosin Cold-Cure 1g cut 11% on 2026-06-04.
- Rimrock Remedies: Disposable Vape 1g cut 10% on 2026-06-03.
- Last Best Leaf: Pre-Roll 1g cut 13% on 2026-06-02.

Key Metrics

MARKET SHELF PRESENCE

12/28

43% of stores in the selected market currently show Northern Lights Botanicals.

STATEWIDE CARRIERS

31

Stores carrying the brand across the current data set.

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OBSERVED PRODUCTS

24

Primary categories: Flower, Vape, Concentrate

MEDIAN PRODUCT PRICE

$38

Representative read from Northern Lights OG 1/8 oz.

RECENT PRICE MOVES

10

Observed price movement for this brand in the selected market.

TARGET RETAILERS

12

Stores carrying comparable categories but not this brand.

Shelf Presence

Treasure State Dispensary	Helena - 1 mi	9 products
Garden City Cannabis	Missoula - 3 mi	8 products
Glacier Greens	Kalispell - 12 mi	7 products
Big Sky Botanicals	Bozeman - 5 mi	6 products
Rimrock Remedies	Billings - 22 mi	6 products
Copper Mountain Cannabis	Butte - 8 mi	5 products
Last Best Leaf	Whitefish - 15 mi	5 products
Bitterroot Buds	Hamilton - 18 mi	4 products
Saddle Peak Selects	Belgrade - 7 mi	4 products
Madison River Munchies	Ennis - 25 mi	3 products
Frontier Flower Co.	Great Falls - 30 mi	3 products

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High Plains Provisions	Havre - 40 mi	2 products

Top Observed Products

Northern Lights OG 1/8 oz	Flower	18 stores - median $38 - $34-$44
Live Resin Cart 1g	Vape	16 stores - median $40 - $36-$46
100mg Gummies	Edible	15 stores - median $20 - $16-$24
Pre-Roll 1g	Pre-roll	14 stores - median $9 - $7-$12
Infused Pre-Roll 5pk	Pre-roll	13 stores - median $48 - $42-$55
Disposable Vape 1g	Vape	12 stores - median $40 - $35-$45
Rosin Cold-Cure 1g	Concentrate	11 stores - median $55 - $48-$62
Sunset Sherbet 1/8 oz	Flower	10 stores - median $40 - $36-$46
House Flower 1oz	Flower	9 stores - median $210 - $180-$240
Live Resin Badder 1g	Concentrate	8 stores - median $36 - $30-$42
Solventless Gummies 100mg	Edible	7 stores - median $28 - $24-$32
1:1 Tincture 30ml	Tincture	6 stores - median $40 - $34-$46

Comparable Brands

High Plains Extracts	Concentrate	19 stores - 22 products - avg $42

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Glacier Gold	Vape	17 stores - 18 products - avg $39
Sapphire Standard	Flower	15 stores - 16 products - avg $38
Yellowstone Organics	Edible	13 stores - 14 products - avg $21
Bridger Botanicals	Flower	12 stores - 12 products - avg $36
Sweetgrass Co.	Edible	10 stores - 11 products - avg $20
Continental Divide Cannabis	Pre-roll	9 stores - 9 products - avg $11
Stillwater Selects	Concentrate	8 stores - 8 products - avg $50
Garnet Valley Growers	Edible	7 stores - 7 products - avg $26
Cabinet Mountains Cannabis	Vape	6 stores - 6 products - avg $37

Retailer Targets

Sapphire City Cannabis	Hamilton - 16 mi	14 comparable products
Headframe Holistics	Butte - 9 mi	12 comparable products
Gallatin Valley Greens	Bozeman - 6 mi	11 comparable products
Clark Fork Cannabis	Missoula - 4 mi	10 comparable products
Electric Peak Provisions	Livingston - 24 mi	9 comparable products
Flathead Fields	Kalispell - 13 mi	8 comparable products

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Beartooth Botanicals	Red Lodge - 28 mi	7 comparable products
Helena Valley Cannabis	Helena - 2 mi	7 comparable products
Going-to-the-Sun Greens	Columbia Falls - 19 mi	6 comparable products
Yellowstone Gateway Cannabis	Gardiner - 35 mi	5 comparable products
Prickly Pear Cannabis	East Helena - 5 mi	4 comparable products
Bridger Bowl Botanicals	Bozeman - 7 mi	4 comparable products

Recent Competitor Movements

Live Resin Cart 1g	Glacier Greens - Vape - 2026-06-07	Raised 7%
100mg Gummies	Copper Mountain Cannabis - Edible - 2026-06-06	Cut 15%
Northern Lights OG 1/8 oz	Garden City Cannabis - Flower - 2026-06-05	Cut 8%
Rosin Cold-Cure 1g	Big Sky Botanicals - Concentrate - 2026-06-04	Cut 11%
Disposable Vape 1g	Rimrock Remedies - Vape - 2026-06-03	Cut 10%
Pre-Roll 1g	Last Best Leaf - Pre-roll - 2026-06-02	Cut 13%
Infused Pre-Roll 5pk	Treasure State Dispensary - Pre-roll - 2026-06-01	Raised 8%
Sunset Sherbet 1/8 oz	Bitterroot Buds - Flower - 2026-05-31	Cut 9%
Live Resin Badder 1g	Saddle Peak Selects - Concentrate - 2026-05-30	Raised 6%

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Methodology

- Brand shelf presence uses the selected market radius and the brands found on each observed menu.
- Retailer targets are stores in the market that do not show the selected brand but do show comparable category activity.
- Comparable brand reads are directional category and shelf-share signals, not verified wholesale sales data.
- Recommendations are account planning prompts; confirm menu freshness and retail relationships before outreach.
- The PDF is generated from saved report results so it can be reviewed again later.

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