

CONFIDENTIAL MARKET BRIEF

Brand Competitive Position Report: Northern Lights Botanicals

MARKET

~50 mile market

STORE

Northern Lights Botanicals (brand account)

GENERATED

Jun 9, 2026

Report Scope

STORE / ACCOUNT

Northern Lights Botanicals (brand account)

MARKET RADIUS

~50 mile market

COMPETITOR COUNT

16

DATA WINDOW

Last 30 days for movement data; current menu snapshot for shelf presence and product coverage.

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

ILLUSTRATIVE DATA - NOT A REAL STORE

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

PRODUCTS

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

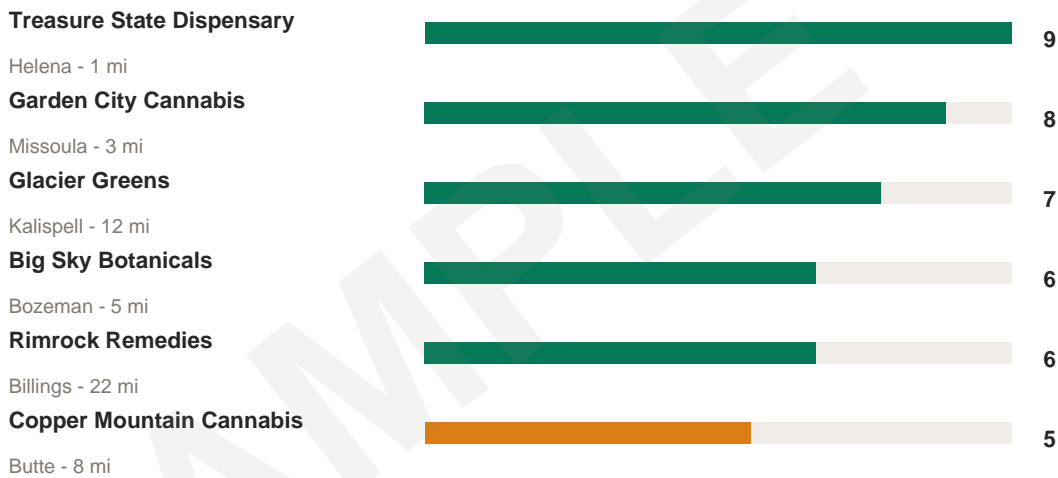


Exhibit 2 - Product footprint

STORES

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

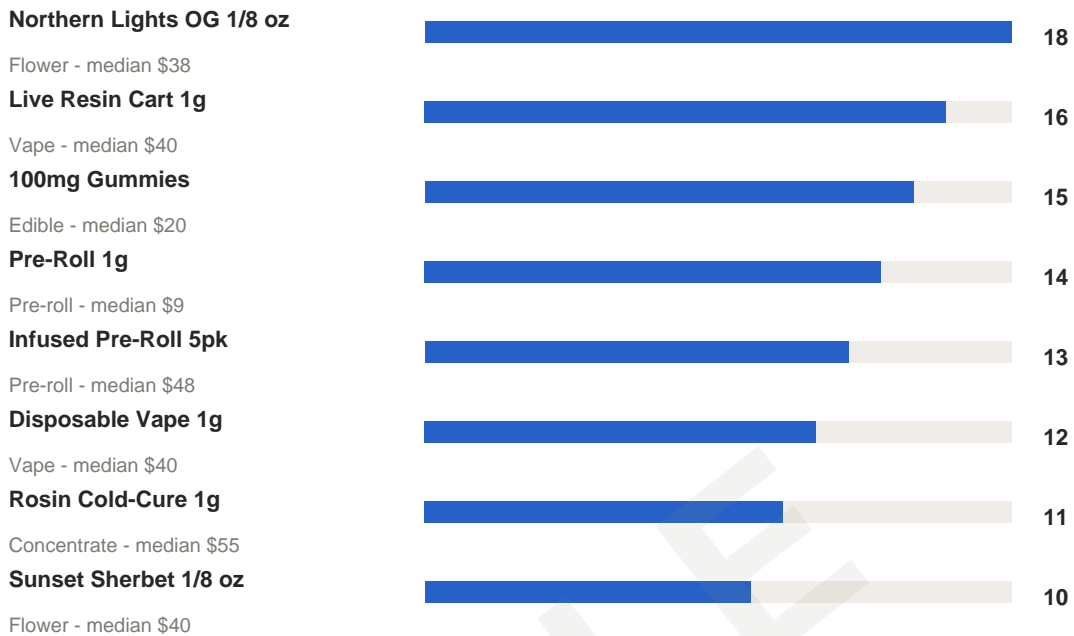


Exhibit 3 - Comparable brand pressure

STORES

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

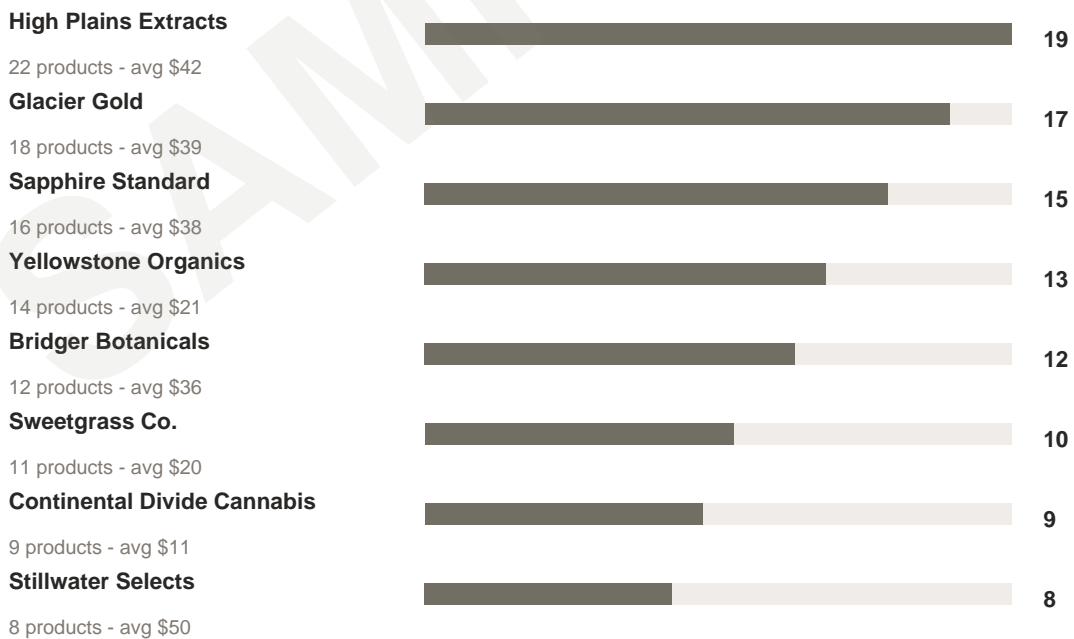


Exhibit 4 - White-space accounts

COMPARABLE SKUS

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

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

Recommended Action Plan

P1

Benchmark against High Plains Extracts

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

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.

P2

Benchmark against Glacier Gold

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

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.

P3

Benchmark against Sapphire Standard

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

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.

P4

Expand into Sapphire City Cannabis

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

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.

ILLUSTRATIVE DATA - NOT A REAL STORE

P5

Expand into Headframe Holistics

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

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.

P6

Expand into Gallatin Valley Greens

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

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.

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.

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 |

ILLUSTRATIVE DATA - NOT A REAL STORE

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 |
|----------------------|-------------|------------------------------------|

| | | |
|------------------------------------|-------------|------------------------------------|
| 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 |

ILLUSTRATIVE DATA - NOT A REAL STORE

| | | |
|-------------------------------------|------------------------|-----------------------|
| 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% |

ILLUSTRATIVE DATA - NOT A REAL STORE

Methodology

- Brand shelf presence uses the selected market radius and the current store-brand rollup from observed menus.
- 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.
- PDF output is generated from the stored report snapshot so the report remains reproducible.

SAMPLE