CONFIDENTIAL MARKET BRIEF

Brand Shelf Presence 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.

SAMPLE

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 monitor current account coverage, shelf depth, and stores where presence should be verified.

Decision Brief

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DECISION QUESTION

Where is the brand on shelf, and where should placement be verified?

COMMERCIAL READ

Northern Lights Botanicals appears in 12 of 28 market stores (43% shelf presence).

RECOMMENDATION

Prioritize account verification where shelf depth is low, then use product footprint to decide whether to defend or expand placement.

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.

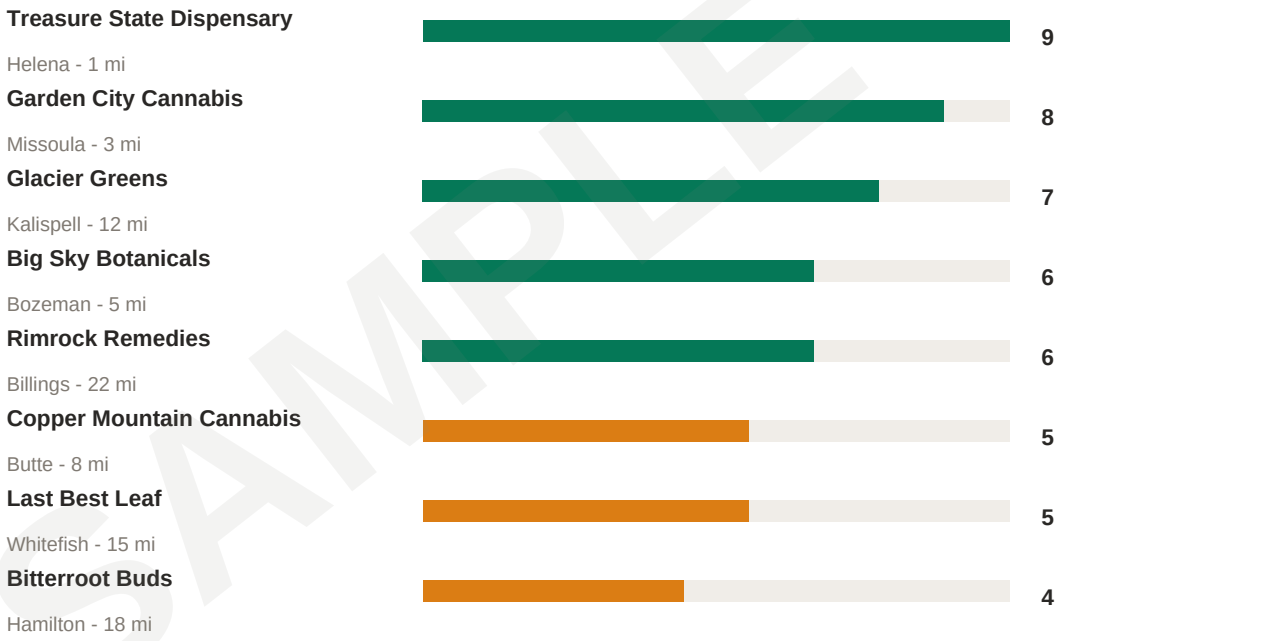

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Exhibit 2 - Product footprint

STORES

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

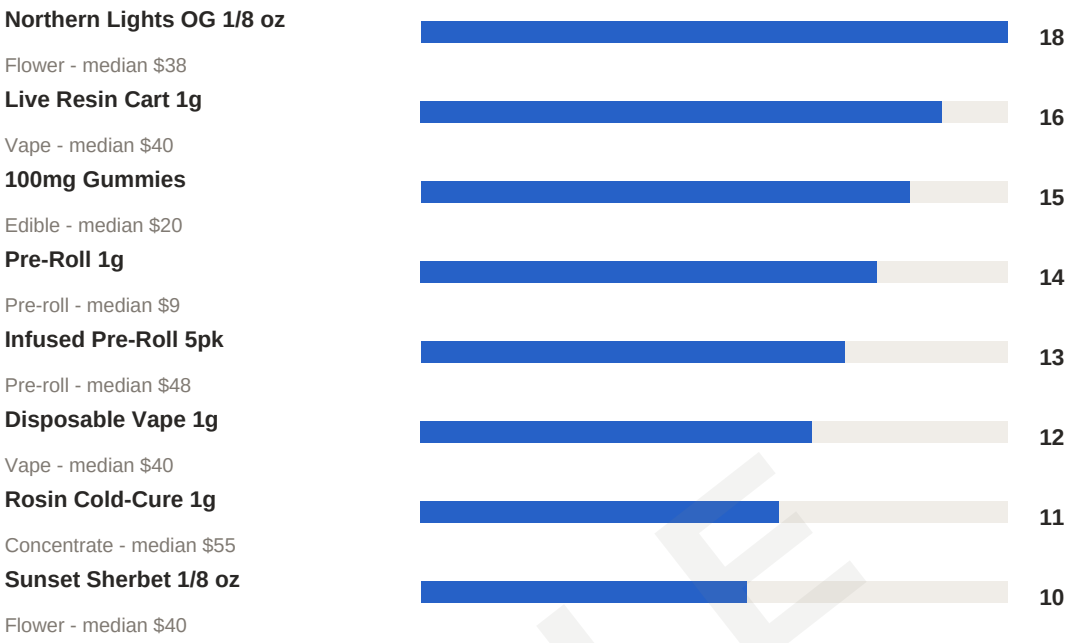

Exhibit 3 - White-space accounts

COMPARABLE SKUS

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



Recommended Action Plan

P1

Verify shelf depth at Treasure State Dispensary

Why: Treasure State Dispensary currently shows 9 Northern Lights Botanicals products.

Action: Document the product mix as an account to defend and replicate.

Watchout: Menu data should be confirmed before treating a drop in visible products as a lost placement.

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P2	**Verify shelf depth at Garden City Cannabis** Why: Garden City Cannabis currently shows 8 Northern Lights Botanicals products. Action: Document the product mix as an account to defend and replicate.	Watchout: Menu data should be confirmed before treating a drop in visible products as a lost placement.
P3	**Verify shelf depth at Glacier Greens** Why: Glacier Greens currently shows 7 Northern Lights Botanicals products. Action: Document the product mix as an account to defend and replicate.	Watchout: Menu data should be confirmed before treating a drop in visible products as a lost placement.
P4	**Review recent brand price movement** Why: 10 recent price moves were observed for this brand. Action: Check whether the movement is isolated account behavior or a broader pricing reset.	Watchout: Do not treat a single retailer's change as market guidance without context.

Analyst Notes

Shelf coverage thesis

Northern Lights Botanicals's shelf presence report is a placement audit for ~50 mile market. It highlights where the brand appears, how deep the visible shelf is, and which accounts deserve verification.

- Treasure State Dispensary: 9 products in Helena.
- Garden City Cannabis: 8 products in Missoula.
- Glacier Greens: 7 products in Kalispell.
- Big Sky Botanicals: 6 products in Bozeman.
- Rimrock Remedies: 6 products in Billings.
- Copper Mountain Cannabis: 5 products in Butte.

Product footprint

Product footprint shows which SKUs create the brand's visible market presence and where the line may be too narrow.

- Northern Lights OG 1/8 oz: 18 stores, median $38.
- Live Resin Cart 1g: 16 stores, median $40.
- 100mg Gummies: 15 stores, median $20.
- Pre-Roll 1g: 14 stores, median $9.
- Infused Pre-Roll 5pk: 13 stores, median $48.
- Disposable Vape 1g: 12 stores, median $40.

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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

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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
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

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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

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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
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%

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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%
House Flower 1oz	Frontier Flower Co. - Flower - 2026-05-29	Cut 9%

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.

SAMPLE

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