CONFIDENTIAL MARKET BRIEF

# Retailer Target 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 as an account prioritization list, then validate buyer fit, menu freshness, and relationship context.

## Decision Brief

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**DECISION QUESTION**

**Which retailers are the strongest account targets for outreach?**

**COMMERCIAL READ**

Sapphire City Cannabis is the strongest target account: 14 comparable products, no observed Northern Lights Botanicals shelf presence.

**RECOMMENDATION**

Treat target retailers as an outreach queue, then validate buyer relationship, category fit, and menu freshness before presenting the account.

**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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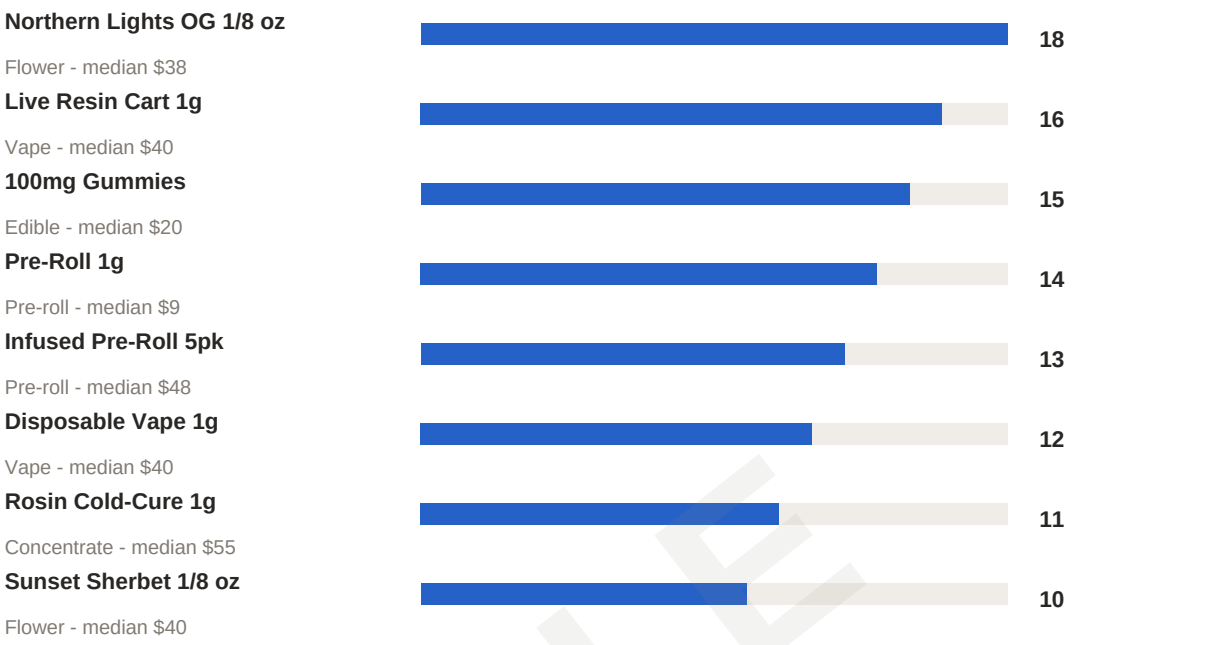
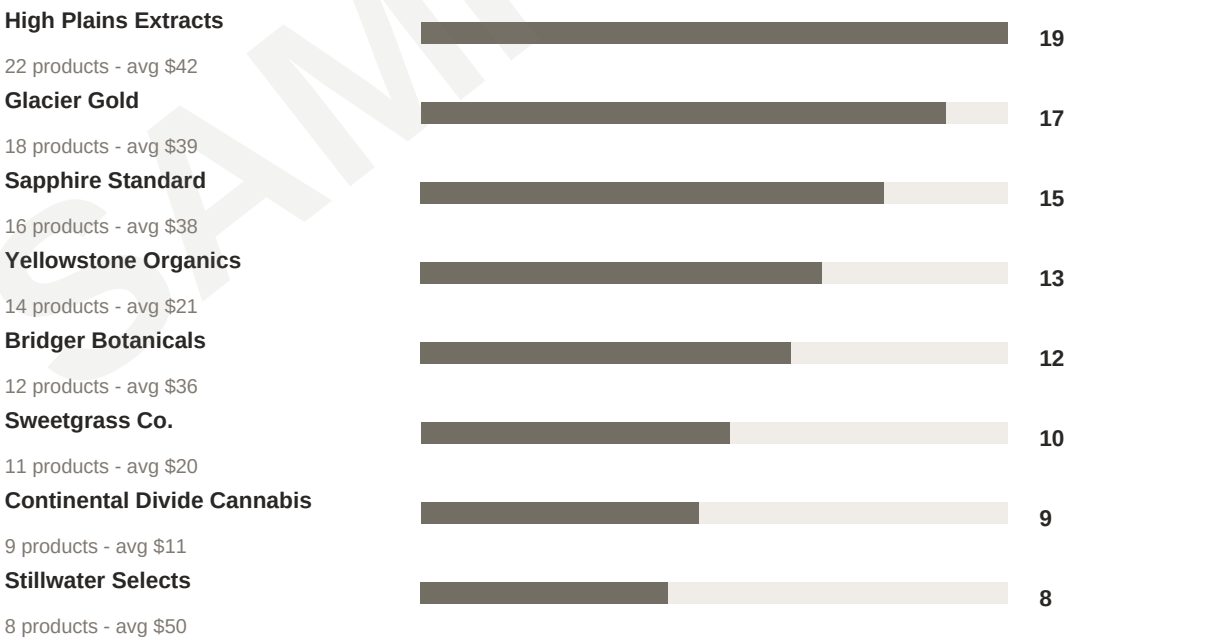
## Exhibit 2 - Product footprint

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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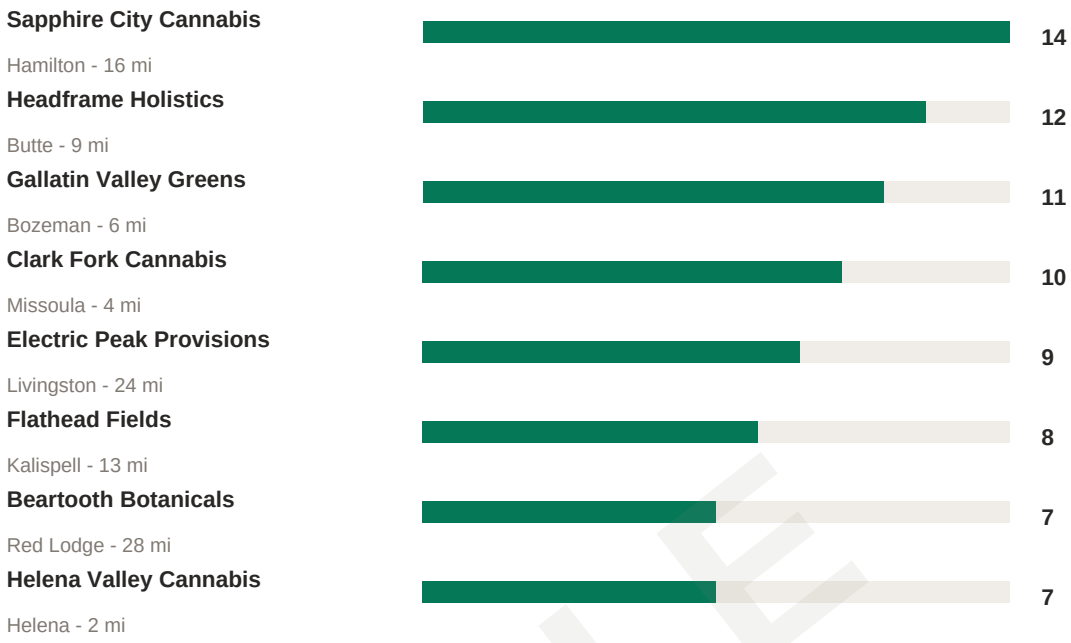
## Exhibit 4 - Highest-fit retailer targets

COMPARABLE SKUS

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




# Recommended Action Plan

**P1**

### Target account: Sapphire City Cannabis

Why: 14 comparable products across 3 relevant categories, with no observed Northern Lights Botanicals placement.

Action: Validate menu freshness, identify buyer/category owner, and tailor outreach around the comparable categories already on shelf.

Watchout: This is an account-fit signal, not confirmation the buyer wants the brand. Confirm relationship context before pitching.

**P2**

### Target account: Headframe Holistics

Why: 12 comparable products across 2 relevant categories, with no observed Northern Lights Botanicals placement.

Action: Validate menu freshness, identify buyer/category owner, and tailor outreach around the comparable categories already on shelf.

Watchout: This is an account-fit signal, not confirmation the buyer wants the brand. Confirm relationship context before pitching.

**P3**

### Target account: Gallatin Valley Greens

Why: 11 comparable products across 2 relevant categories, with no observed Northern Lights Botanicals placement.

Action: Validate menu freshness, identify buyer/category owner, and tailor outreach around the comparable categories already on shelf.

Watchout: This is an account-fit signal, not confirmation the buyer wants the brand. Confirm relationship context before pitching.

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| P4 | **Target account: Clark Fork Cannabis**<br>Why: 10 comparable products across 3 relevant categories, with no observed Northern Lights Botanicals placement.<br>Action: Validate menu freshness, identify buyer/category owner, and tailor outreach around the comparable categories already on shelf. | Watchout: This is an account-fit signal, not confirmation the buyer wants the brand. Confirm relationship context before pitching. |
| P5 | **Target account: Electric Peak Provisions**<br>Why: 9 comparable products across 2 relevant categories, with no observed Northern Lights Botanicals placement.<br>Action: Validate menu freshness, identify buyer/category owner, and tailor outreach around the comparable categories already on shelf. | Watchout: This is an account-fit signal, not confirmation the buyer wants the brand. Confirm relationship context before pitching. |
| P6 | **Target account: Flathead Fields**<br>Why: 8 comparable products across 2 relevant categories, with no observed Northern Lights Botanicals placement.<br>Action: Validate menu freshness, identify buyer/category owner, and tailor outreach around the comparable categories already on shelf. | Watchout: This is an account-fit signal, not confirmation the buyer wants the brand. Confirm relationship context before pitching. |

# Analyst Notes

## Targeting thesis

Northern Lights Botanicals's target list is ranked by comparable menu activity inside ~50 mile market. The highest-priority accounts already show category demand signals but do not currently show the brand.

- Sapphire City Cannabis: 14 comparable products; categories include Concentrate, Flower, Vape.
- Headframe Holistics: 12 comparable products; categories include Edible, Vape.
- Gallatin Valley Greens: 11 comparable products; categories include Flower, Concentrate.
- Clark Fork Cannabis: 10 comparable products; categories include Vape, Edible, Pre-roll.
- Electric Peak Provisions: 9 comparable products; categories include Flower, Edible.
- Flathead Fields: 8 comparable products; categories include Concentrate, Vape.

## Outreach packaging

The sales motion should translate the data into buyer-specific category logic rather than a generic brand pitch.

- Lead with category fit and current menu comparables.
- Bring a tight product ladder, not the full product line.
- Verify menu freshness before treating a store as a true white-space account.

# Key Metrics

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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 |

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|---|---|---|
| **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 |
| **1:1 Tincture 30ml** | Tincture | 6 stores - median $40 - $34-$46 |

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## 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 |

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|---|---|---|
| **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% |
| **Infused Pre-Roll 5pk** | Treasure State Dispensary - Pre-roll - 2026-06-01 | Raised 8% |

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|---|---|---|
| **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.

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