LTEA GUIDE FOR BRANDS · FROM SELL-IN TO SHELF

Your brand pays all the way to the shelf. The result happens on it.

Trade budgets, displays, promotions and coolers are planned at headquarters and decided in the store, where the brand does not see. This guide shows where the money leaks between sell-in and sell-out, what leading brands are doing about it, and how we turn that gap into gains on the shelf: process analysis, quick wins in 30 days and technology only where it pays back.

~20%

of CPG revenue goes to trade promotion

McKinsey 2019, citing Nielsen; Strategy& (PwC) 2017

59%

of promotions lose money worldwide (72% in the US)

Nielsen, cited by McKinsey 2019

~30%

of promotional displays never reach the store floor

UT Austin McCombs (Stamatopoulos et al.), 2018

BRAND → STORE → SHOPPER



Claudio B. Landsberg

Founder & Managing Director, LTEA Advisory

30+ years in retail operations and technology · RTIH Top 100 Retail Technology Influencers 2026

The 5 leaks between sell-in and sell-out

Each leak happens in a place the brand rarely measures. Together, they decide how much of the trade budget turns into sales.



1

Trade that does not come back

59%

of promotions do not break even; 67% in another Nielsen survey, with 22% destroying value

Nielsen via McKinsey 2019; Strategy& 2017

2

Displays that never go up

~40%

real display compliance, while brands believe it is ~70%; only 21% of retailers monitor compliance

Shopper Association (via Repsly); POPAI Compliance Report 2015

3

Stock in the store, not on the shelf

70–75%

of out-of-stocks start inside the store; ~65% of store inventory records are wrong

FMI/GMA/CIES 2002; DeHoratius & Raman, Management Science 2008

4

Shelf and planogram that drift

+12%

sales from keeping planograms intact in a 90-store study; +10% shelf space ≈ +1.7% sales on average

FDI/The Partnering Group, 2000; Eisend, Journal of Retailing 2014

5

Shoppers who switch brand

70%

of European shoppers switch brand when their usual choice is missing; globally 26% switch and 31% go to another store

NielsenIQ 2022; FMI/GMA/CIES 2002

$48B

lost to out-of-stocks in US retail in one year; one beer brand was losing $400K a week

NielsenIQ, Conquering the retail shelf, 2024

What the brand does not see

Brands have rich sell-in and sell-out data. What they rarely have is the store: who executed, what is in the backroom, what the shopper found.

64%

of manufacturers struggle to get retailers to share basic POS and shopper data

POI State of the Industry 2021

40%

of brands could monitor promotions while they were running

POI 2019, via Repsly

79%

of retailers just assume displays are up, without checking

POPAI Compliance Initiative, 2013

Three lenses on the same store

1

The brand planned

Joint business plan, trade calendar, planograms, displays, coolers

2

The retailer reports

Sell-out, stock in the system, compliance as reported

3

LTEA sees

Online check through Scout + field visits where the gap is: what is really on the shelf, in the backroom and in the cooler, and why

THE CAUSE IN THE PROCESS, THE GAP IN MONEY, BY ACCOUNT → 3×3

Your brand's project, in three steps

A project for your brand and your accounts, paid by the brand. Same method we use in retail: process first, quick wins next, technology only where it pays back.

STEP 1

Process diagnosis of your execution

Not a survey: why it breaks

Data is collected online through Scout and the LTEA platform, by your own field team, with LTEA in the field only where the gap is. We analyze the process behind each gap: order, delivery, backroom, merchandiser routine, display setup, price and cooler. You get the root cause and the gap in money, by account.

Who buys: Sales and key account directors, trade marketing, field sales

STEP 2

Quick wins on the shelf in 30 days

3×3 plan, executed with your team

3 priorities and 3 quick wins per account, each with an owner in your team (field force, trade marketing, key accounts) and a target. Quick wins use what you already have: routines of promoters and reps, order rules, display checklists. The gain shows up on the shelf in weeks, not in the next report.

Who buys: Field sales and merchandising leadership, trade marketing

STEP 3

Technology solution, new or improved

First improve what you already pay for

Many brands already pay for image recognition, field apps or connected coolers that are used only in part. We first make what you have work every day; where the gap remains, we specify the new technology and measure it against control stores before scaling. Part of the trade budget can fund it.

Who buys: Revenue growth management, retail execution, digital commerce

How we create gains on the shelf, fast

1	**Online check**	Scout + platform, item by item, by your team
2	**Process analysis**	Order, delivery, backroom, routine, display, price
3	**Quick wins**	What you already have, with owner and target
4	**Technology**	Improve what exists; new only by ROI
5	**Gain measured**	On the shelf, against control stores

Market panels measure. LTEA changes the shelf.

We do not replace your market data: panels and audits (such as NielsenIQ or Circana) are where we start. We go where measurement stops.

	Market panels and audits	LTEA
Question it answers	How much: share, distribution, price, out-of-stock	**Why it happens and what to change tomorrow**
What you get	Periodic reports and indicators	**Root cause in the process + 3×3 plan with owner and target**
How data is collected	Auditors, retail and shopper panels	**Online through Scout and the LTEA platform, by your field team; LTEA visits only where the gap is**
Technology	Not in scope	**New technology or improvement of what you already have, by ROI**
Time to gain	Next reporting cycle	**Quick wins running in 30 days**
Role	Measure the market	**Change execution on the shelf**

Why LTEA

30 years inside store operations and technology: we know how an order, a delivery and a display really happen in the store, so we find the cause fast and fix it with your team.

30+ years

in retail operations and technology

500+

retailers served

53

documented cases

Brands

Coca-Cola, PepsiCo, Ambev, Nestlé, JBS, Disney

What leading brands are already doing

Market cases with published results. "Vendor" marks numbers reported by the technology supplier.

Coca-Cola HBC

VENDOR

Image recognition audits in 28 countries

-63%

out-of-stocks; execution score +10%; 28k → 130k stores covered a month; audit 20 → 2 minutes

Trax customer case (vendor)

Nestlé (Ukraine)

Digital twin of retail execution, 45k visits a month

84 → 95%

promotional availability; data accuracy 75% → 97%; shelf audit time -60%

Consumer Goods Technology, 2026

Henkel (Germany)

VENDOR

Shelf and distribution tracking, 2,500 stores, 35+ retailers

+2.1%

sales; out-of-stocks -4.3%; rep selling time +150%

Trax via BestPractice.ai (vendor)

Coca-Cola FEMSA

Juntos+ B2B platform for traditional trade (Latin America)

35%

of sales through digital channels; 1.1M+ monthly active buyers and US$2.5B+ digital revenue in 2023

Coca-Cola FEMSA Q4 2023 results; DPL News 2024

AB InBev · BEES

B2B ordering and marketplace for small retailers

72%

of global revenue through digital B2B platforms; US$11.6B GMV in one quarter (+10%)

Digital Commerce 360, Q1 2025

Walmart + suppliers

Case-level RFID, 12 pilot vs 12 control stores

-16%

out-of-stocks; tagged items replenished 3× as often; manual orders -10%

University of Arkansas, via RFID Journal, 2005

Multinational food brand

VENDOR

Weekly audit-and-correct in 3,000 stores, vs control

+8.2%

sales vs control stores; out-of-stocks -33.6%

Driveline Retail case (vendor)

Bain · perfect store

Sales execution programs at FMCG companies

+30%

higher share in perfect stores (LatAm beverages); snacks +3% volume and +7% profit vs -6% outside the program

Bain & Company, Perfecting Sales Execution, 2011

From trade to tech: the menu

Technologies brands fund or co-fund at the point of sale, with published results. We pick by the order of the gain: first what the store already has, then process, then technology where it pays back.

Image recognition audits

Rep photos or shelf cameras read OOS, planogram, share of shelf and price

OOS -63% (Coca-Cola HBC, vendor); sales +8% in a camera pilot (vendor)

Trax · ParallelDots · Ailet · Vispera

Connected coolers

Telemetry on brand coolers: location, temperature, door openings, purity

Cooler purity compliance +70% (vendor); energy up to -47% in LatAm pilots (vendor); fleets lost up to 6% a year before tracking

AoFrio · Sollatek · Coolr · Frigoglass

In-store retail media

Checkout screens, in-store audio, cooler doors and shelf-edge displays

+14% average lift in 16 test-vs-control studies (screens, vendor); +18.8% for in-store audio (IRI-measured, vendor); works best in large formats

Grocery TV · Vibenomics · Qsic · Pricer

Shelf-edge digital

ESL and digital rails with brand logos, images and promotions

+2.2% sales, +4.8% with brand logos in two stores (vendor); digital end-cap rails up to +150–350% (vendor, best case)

VusionGroup · Pricer · Hanshow · SoluM

Source tagging & RFID

Tags applied at the factory: inventory, OOS and loss visibility from DC to shelf

Accuracy 63% → 95%, OOS up to -50%, 8 brands and 5 retailers (Auburn RFID Lab/GS1 US); tags ~$0.03–0.04 at volume

Avery Dennison · ITL · Checkpoint · SML

Perfect-store & field apps

Merchandiser and rep apps with perfect-store scoring and photo proof

Perfect stores held 30%+ higher share; +1–3 share points in 10 countries (Bain); +11% time in store (vendor)

Salesforce CG Cloud · SAP · StayinFront · Pepperi

In-store media is still small and growing: about 3.3% of US non-Amazon retail media in 2025, with measurement as the main barrier. That is exactly where a measured pilot wins budget.

eMarketer, 2026; McKinsey Commerce Media 2026 (cited by Qsic)

A 30-day pilot with your brand

Week 1
Pick 1–2 accounts, SKUs and stores; load your plan

Week 2
Online check through Scout, item by item

Week 3
Process analysis + LTEA where the gap is

Week 4
Gap in money + 3×3 per account

Day 30
Quick wins running on the shelf, gain measured

Typical quick wins for brands

Launch-week display check

Photo proof in the top stores in the first 72 hours of every promotion

Attacks: about 30% of displays never go up

Backroom-to-shelf rescue

Daily list of your SKUs with stock in the store and an empty shelf

Attacks: 70–75% of OOS start in the store

Stock check before the promo

Confirm stock and price in each store before the flyer hits

Attacks: promotions lose money when the product is missing

Let's find where your trade budget leaks

30 minutes to choose the accounts, the SKUs and the stores for a 30-day pilot.

ltea-advisory.com · claudio@ltea-advisory.com

Book 30 minutes

SOURCES

- McKinsey, How analytics can drive growth in CPG trade promotions, 2019 (citing Nielsen 2016)
- Strategy& (PwC), Zero-based trade for CPG leaders, 2017
- UT Austin McCombs (Stamatopoulos, Agarwal, Zeng), Operational Execution and POP Campaign Effectiveness, 2018
- Shopper Association POP Compliance study, via Repsly; POPAI Compliance Report, Issue 24, 2015
- FMI/GMA/CIES (Gruen, Corsten & Bharadwaj), Retail Out-of-Stocks: A Worldwide Examination, 2002
- DeHoratius & Raman, Inventory Record Inaccuracy, Management Science, 2008
- FDI / The Partnering Group shelf integrity study, via Supermarket News, 2000; Eisend, Journal of Retailing, 2014
- NielsenIQ, Can the FMCG industry afford to lose billions from empty shelves?, 2022; NielsenIQ, Conquering the retail shelf, 2024
- Promotion Optimization Institute, State of the Industry 2019 and 2021
- Trax customer cases (Coca-Cola HBC; Henkel via BestPractice.ai) — vendor
- Consumer Goods Technology, Nestlé Ukraine retail execution, 2026
- Coca-Cola FEMSA Q4 2023 results; DPL News, 2024
- Digital Commerce 360, AB InBev B2B digital sales Q1 2025
- University of Arkansas RFID study at Walmart, via RFID Journal, 2005
- Driveline Retail, audit-and-correct case — vendor
- Bain & Company, Perfecting Sales Execution, 2011
- Auburn RFID Lab / GS1 US, Project Zipper, via DC Velocity, 2018; Packaging Europe, 2023
- ParallelDots, AoFrio, Grocery TV, Vibenomics/IRI, Pricer, VusionGroup cases — vendor
- eMarketer, in-store retail media, 2025–2026; McKinsey Commerce Media 2026 (via Qsic)
- Roggeveen, Grewal & Nordfält, Do digital displays enhance sales?, Journal of Retailing, 2016

Results from market cases depend on each company, retailer and execution; numbers reported by vendors are flagged. This guide is a lens, not a diagnosis of your brand.