Q4 BRAND PLAYBOOK 2026 · FOR CONSUMER GOODS BRANDS

In the peak, your trade money is spent at a shelf you cannot see.

The holiday quarter concentrates displays, promotions, seasonal packs and the year's biggest trade investment into a few weeks. The retailer freezes change, the field team runs out of time, and the panel shows the result in February. This guide shows where a brand loses at the shelf in Q4, how much it can win back, and 3 quick wins per category to run in the next 30 days.

29%

of promotional displays never reached the store floor; those that did stayed up for 62% of the campaign

Agarwal, Stamatopoulos & Zeng, MSOM; US stores, 2017–18 data

1.3×

more sales lost to empty shelves in the weeks before Thanksgiving than in an average week

NielsenIQ, on-shelf availability, 2022

+129%

unit lift when a promotion had both a feature and a display

Circana, 52 weeks to Q3 2023

INSIDE

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HOW TO READ THIS GUIDE

Market data comes with its source on the same page. The quick wins are patterns LTEA finds in the field, not a diagnosis of your brand. This is a brand project, paid by the brand, separate from any retailer project.



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30+ years in retail operations and technology · 500+ retailers served · 53 documented cases · RTIH Top 100 Retail Technology Influencers 2026

WHY NOW

Your Q4 trade money is already committed. Now the job is getting it back at the shelf.

The display is paid, the flyer is printed, the seasonal pack has shipped. What is still open is whether it all happens in the store, in time, in the stores that sell.

What a display really delivers



In a peer-reviewed study of promotional displays, 29% never reached the store floor, and those that did stayed up for only 62% of the campaign. Better execution was worth up to +6.9% in dollar sales during campaign weeks.

Agarwal, Stamatopoulos & Zeng, Manufacturing & Service Operations Management; US stores, 2017–18 data

What we hear, and what we answer

“The retailer won't change anything in Q4.”

We do not touch the retailer's systems. We check that what you already paid for happens, with your own field team.

“We will see it in the panel.”

The panel shows in February what you lost in December. Scout shows today which store, which SKU and why.

“The field team has no time in the peak.”

Focus the routes on the stores that sell, a photo check takes minutes, and LTEA goes only where the gap is.

“The budget is already spent.”

Exactly. Quick wins cost almost nothing and protect the money you already put in the store.

Measure in the chaos. Fix before January. Plan next year with real data.

The brand peak calendar

Each phase has its own leak. By the time the panel or the deduction arrives, the season is over.

OCTOBER

Sell-in & set

Orders, seasonal packs ship, displays set

NOVEMBER

Events

Black Friday, Cyber week, flyers, promo prices

DECEMBER

Sell-out peak

Replenishment race, last-minute gifts

JANUARY

The bill

Deductions, leftovers, markdown money

KEY DATES 2026–27

Oct	Nov 26	Nov 27	Nov 30	Dec	Dec 24–25	Jan	Feb
Holiday sets ship	Thanksgiving	Black Friday	Cyber Monday	Cold & flu peak	Christmas	Deductions arrive	Panel shows Q4

Where each brand leak peaks

	OCTOBER	NOVEMBER	DECEMBER	JANUARY
The display that never goes up	High	Critical	High	Low
The display that goes up late	High	Critical	High	Low
The promoted item that runs out	Rising	Critical	Critical	Rising
The shopper who switches and stays	Rising	High	Critical	High
The promotion that does not pay	Rising	Critical	High	Rising
Fewer displays to fight for	High	Critical	High	Low
Trade money with no proof	High	Critical	Critical	Rising
January sends the bill	Low	Rising	High	Critical

Low · Rising · High · Critical

LTEA field view, built on the data in this guide.

8 ways the peak eats brand results

What happens between sell-in and sell-out, with the market data behind it.

The display that never goes up

29% **of promotional displays never reached the floor; only 2% went up and came down on time**

At the shelf: Paid, shipped, and still in the backroom when the promotion starts.

Agarwal, Stamatopoulos & Zeng, MSOM, US stores 2017–18; UT Austin McCombs

The display that goes up late

28% **of displays were on the floor within 3 days of the promotion launch**

At the shelf: In a 2-week event, a week late is half of the money.

MIT, European retailer data, 2010

The promoted item that runs out

1.3× **more sales lost to empty shelves in the weeks before Thanksgiving than in an average week**

At the shelf: The flyer brings the shopper and the shelf sends them to another brand.

NielsenIQ, on-shelf availability, 2022

The shopper who switches and stays

26% **of shoppers switch brand when the item is missing and 31% go to another store; 44% of switchers would keep the new brand**

At the shelf: A December stock-out can cost the next year of purchases.

FMI/GMA/CIES, 2002; Inmar survey via Grocery Dive, 2021

The promotion that does not pay

~3/4 **of promotions do not break even, in a study of 39 million promo events; lifts remain 25% below historical levels**

At the shelf: When execution fails, the discount is paid and the volume is not there.

Nielsen via FoodNavigator, 2014; Circana, 2023

Fewer displays to fight for

-10 **displays per grocery store on average since 2018, so every slot in the peak counts more**

At the shelf: The competitor that checks the store first takes the end cap.

Circana, in-store displays, Jan 2024

Trade money with no proof

8–11% **of revenue goes to trade spend, up to 20% for some brands; others put it at up to 30% of gross revenue**

At the shelf: The second largest line in the P&L, mostly checked after the money is gone.

McKinsey, Jun 2026; Roland Berger, Dec 2023

January sends the bill

1–3% **of revenue lost to deductions, in one consultancy estimate; without execution proof, disputes are hard to win**

At the shelf: Markdown money, unsaleables and penalties arrive when the season is over.

Capgemini, deductions management paper, Jun 2025

WHERE THE GAIN IS

+129%

unit lift from a promotion with feature and display together

Circana, 2023

+6.9%

dollar sales in campaign weeks possible from better display execution

MSOM; US stores, 2017–18 data

+30%

higher market share in a beverage maker's "perfect stores" than in non-program stores

Bain, Perfecting sales execution, 2011

3 quick wins per category

Each one with an owner inside the brand and a target, ready to run in the next 30 days with your field team and what you already have.

Food & snacks

Peak risk: Holiday baking, gifting packs and party snacks are sold in a few weeks on secondary displays. If the display goes up late or the promoted SKU runs out, the trade money is spent and the volume goes to the brand next to you.

1.3×
more sales lost to empty shelves in the weeks before Thanksgiving
NielsenIQ, 2022

1 USE WHAT YOU HAVE

Photo check of every holiday display in the top stores within 72 hours of the set date

Owner **Field sales lead**
Target **Every paid display confirmed or claimed**

2 FIX THE PROCESS

Daily list of promoted SKUs with stock in the store and an empty shelf, sent to the merchandiser route

Owner **Merchandising manager**
Target **Gap fixed on the next visit**

2 FIX THE PROCESS

Visit frequency moved to the 20% of stores that sell 80% of the holiday volume

Owner **Field sales lead**
Target **Top stores visited at least twice a week in the peak**

Beverages

Peak risk: Parties and travel days push cold beverages to their highest weeks. Coolers you paid for get filled with other brands, multipacks run out on the floor, and the end cap of the event belongs to whoever checks it first.

−10
displays per grocery store on average since 2018
Circana, Jan 2024

1 USE WHAT YOU HAVE

Cooler purity check with a photo on every visit, using the field app you already have

Owner **Field sales lead**
Target **Branded coolers with your brand only**

2 FIX THE PROCESS

Peak-day stock plan for multipacks with each key account: order earlier, deliver before the weekend

Owner **Key account manager**
Target **No multipack out on peak weekends**

2 FIX THE PROCESS

Event end cap claimed and checked in the 48 hours before each event

Owner **Trade marketing**
Target **End cap up in every target store**

Beauty & personal care

Peak risk: Gift sets are the most stolen and the most locked items of the season. A locked shelf protects the store and loses your sale, and a gift set left after December goes back to you as a return or a markdown.

20%
of annual beauty sales happen in the 8-week holiday period
CEW, citing NIQ, 2025

1 USE WHAT YOU HAVE

Gift set availability and price check in the top stores twice a week until Dec 24

Owner **Merchandising manager**
Target **Every hero set on shelf at the right price**

2 FIX THE PROCESS

Sell-through review of gift sets store by store on Dec 10, moving stock before Christmas

Owner **Demand planning + KAM**
Target **Fewer leftover sets than last year**

2 FIX THE PROCESS

Agree with each account the display rule for high-theft sets: dummy box or tagged stock

Owner **Key account manager**
Target **Hero sets visible, not behind a lock**

Health & OTC

Peak risk: Cold and flu season peaks with the holidays. When the shelf is empty or the product is behind a lock, the shopper takes the store brand or the competitor on the next facing, and often keeps buying it.

27%
of shoppers who find a product locked switch retailer or give up the purchase
Numerator via Retail Dive, Nov 2024

1 USE WHAT YOU HAVE

Weekly availability check of the top 10 cold and flu SKUs in the top stores, from the data you already receive

Owner **Category manager**
Target **Top 10 never missing in top stores**

2 FIX THE PROCESS

Pre-season order plan with each account, based on last year's flu peak by week

Owner **Key account manager**
Target **Stock in store before the peak week**

2 FIX THE PROCESS

Secondary placement for cold and flu near the pharmacy counter, checked with a photo

Owner **Trade marketing**
Target **Placement up in every target store**

Toys, candy & seasonal goods

Peak risk: Seasonal goods have one chance to sell. Every day a pallet waits in the back is a day of lost sales, and what is left after Christmas comes back as markdown money, returns or deductions.

63%
of US confectionery sales came from the four seasonal holidays in 2025
NCA, using Circana data

1 USE WHAT YOU HAVE

Check in the top stores that seasonal pallets reached the floor within 48 hours of delivery

Owner **Field sales lead**
Target **No seasonal stock left in the back**

2 FIX THE PROCESS

Weekly sell-through by store from Black Friday, with stock moved from slow to fast stores

Owner **Demand planning + KAM**
Target **Sell-through above plan by Dec 20**

2 FIX THE PROCESS

Execution proof file per account: photos and dates of every display, ready for January deduction disputes

Owner **Customer finance**
Target **Every disputed deduction backed by proof**

Consumer electronics & appliances

Peak risk: Black Friday decides the year for many SKUs. The demo unit off, the wrong price on the tag or the promoted model missing in the store means the shopper buys the model on the next shelf.

30.9%
average peak discount off list price on electronics in the 2025 holiday season, online
Adobe, Jan 2026

1 USE WHAT YOU HAVE

Demo, price and stock check of the promoted models in the top stores before each event

Owner **Retail execution lead**
Target **Every promoted model live, priced and in stock**

2 FIX THE PROCESS

Promoter and store staff briefing on the 3 reasons to buy, the week before Black Friday

Owner **Trade marketing**
Target **Briefing done in every target store**

2 FIX THE PROCESS

Open-box and return reasons captured by model in January, shared with the accounts

Owner **Customer service + KAM**
Target **Top return reason fixed for the next season**

Brand peak check: 12 questions

Answer for your brand. Count the “no” and “I don't know” answers.

01	Do you know which of your paid displays are up today, store by store?	YES	NO	?
02	Do you get photo proof within 72 hours of every display set date?	YES	NO	?
03	Do you know which promoted SKUs are empty on the shelf today with stock in the store?	YES	NO	?
04	Are merchandiser routes focused on the stores that sell most in the peak?	YES	NO	?
05	Is the shelf price of every promotion checked against the flyer?	YES	NO	?
06	Are your branded coolers and fixtures checked for other brands?	YES	NO	?
07	Do you know which competitor took an end cap in your top stores this week?	YES	NO	?
08	Is store staff briefed on your holiday promotion?	YES	NO	?
09	Do you review seasonal sell-through store by store before Christmas?	YES	NO	?
10	Do you keep execution proof to dispute January deductions?	YES	NO	?
11	Can you see execution while the promotion is running, not after?	YES	NO	?
12	Do you know which accounts and stores lost the most in your last Q4, and why?	YES	NO	?

0–2 Ready

Keep checking during the peak.

3–6 Exposed

Part of the trade money is not coming back. A 3×3 gives each gap an owner.

7+ At risk

The peak will decide your share for you. Start now.

Market panels measure. LTEA changes the shelf.

	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**
Time to gain	Next reporting cycle, after the season	**Quick wins running in 30 days, inside the season**

The 30-day pilot that runs before the peak

One or two accounts, your priority SKUs and stores. A brand project, paid by the brand.

WEEK 1
Pick accounts and SKUs
Load your trade and display plan

WEEK 2
Online check
Scout, item by item, by your field team

WEEK 3
Process analysis
LTEA in the field only where the gap is

WEEK 4
Gap in money + 3×3
Per account, with owner and target

DAY 30
Gain running
On the shelf, measured against control stores

The order of the gain never changes

1
Use what you already have
Field app, image recognition, coolers and data you already pay for, used every day.
Almost no investment

2
Change the process
Routes, routines, owners and rules with each account.
Low cost

3
New technology by ROI
Only where the gap remains, measured against control stores.
Only if it pays back

30+ years	500+	53 cases	35%+	14
in retail	retailers served	documented	average gain	countries

Let's find where your Q4 trade money leaks

Measure in the chaos. Fix before January. Plan next year with real data.

We analyze the process from sell-in to the shelf, collect online with Scout and your field team, deliver quick wins in 30 days and propose new technology or improve the one you have. 30 minutes is enough to pick the pilot accounts.

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Book 30 minutes

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