



FMCG Trade Marketing: Shopper Insight, Perfect Store and Promotion ROI



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Introduction:

Consumer goods brands often win the advertising battle and lose at the shelf: packs are out of stock, facings shrink, promotions buy volume that would have sold anyway and trade spend grows without a clear return. FMCG trade marketing closes that gap by turning shopper insight into distribution, display, promotion and price decisions that retailers accept. This Core Concept course equips brand, trade marketing, category and key account staff with practical tools for pack-price architecture, perfect store standards and promotion evaluation. Participants build a Trade Marketing Plan with Promotion Calendar for a case FMCG brand.

Course Objectives:

- Diagnose an FMCG brand's position at the point of purchase using penetration, rate of sale, out-of-stock and price index measures
- Design a pack-price architecture that separates brand portfolio roles and protects price per unit ladders
- Translate shopper insight and path-to-purchase findings into shelf, display and activation decisions
- Set perfect store standards by channel segment and audit planogram compliance and share of shelf
- Plan trade promotions and evaluate them after the event for incremental volume, cannibalisation and promotion ROI
- Produce a Trade Marketing Plan with Promotion Calendar, funding envelope and KPI dashboard for a case FMCG brand

Target Audience:

- Brand staff who own portfolio, pack and price decisions for consumer goods lines
 - Trade marketing staff who plan in-store activation, point-of-sale material and promotion calendars
 - Category staff who prepare shelf layouts, assortment proposals and category reviews for retail customers
 - Key account staff who agree promotions, listings and trade terms with retail chains and wholesalers
 - Field sales supervisors who check outlet execution against perfect store standards
 - Sales operations and commercial finance staff who track trade spend and promotion results
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Course Outline:

Day 1: FMCG Market Dynamics, Shopper Roles and the Trade Marketing Remit

- FMCG Category Economics: Purchase Frequency, Household Penetration and Rate of Sale
- Shopper Versus Consumer Roles Across Trip Missions and Store Formats
- Trade Marketing Remit Between Brand Team, Field Sales and Retail Customers
- Distribution, Display, Promotion and Price Fundamentals Grid
- Point-of-Purchase Baseline Audit: Out-of-Stock Rate, Facings and Price Index

Day 2: Brand Portfolio, Pack-Price Architecture and Shopper Insight

- Brand Portfolio Roles: Flagship, Flanker, Premium Tier and Entry Price Pack
- Pack-Price Architecture Ladder: Price Points, Pack Sizes and Price per Unit Gaps
- Shopper Insight Sources: Loyalty Card Data, Accompanied Shops and Exit Interviews
- Path-to-Purchase Map: Pre-Store Triggers, Aisle Navigation and Shelf Decision Moments
- Consumer Decision Tree for Category Shelf Blocking

Day 3: Channel Segmentation and Perfect Store Execution

- Outlet Segmentation Matrix: Hypermarket, Supermarket, Convenience, Cash-and-Carry and Grocery Kiosk
- Modern Trade Versus Traditional Trade Outlet Classification and Call Frequency
- Perfect Store Scorecard: Must-Stock List, Shelf Standard and Secondary Placement
- Planogram Compliance Checks and Share of Shelf Versus Fair Share Measurement
- Point-of-Sale Material Kit: Shelf Strips, Gondola Ends, Floor Stands and Chiller Branding

Day 4: Trade Promotion Economics, Trade Terms and Retailer Planning

- Promotion Mechanics: Temporary Price Reduction, Multibuy, Bonus Pack and Gift With Purchase
- Promotion Baseline Forecasting and Incremental Volume Estimation
- Post-Promotion Evaluation: Cannibalisation, Forward Buying, Pantry Loading and Promotion ROI
- Trade Terms Overview: Listing Fees, Off-Invoice Discounts and Conditional Performance Payments
- Retailer Joint Business Plan Overview and Cost-to-Serve by Route to Market

Day 5: Case Study: Trade Marketing Plan and Promotion Calendar

- Beverage Brand Case: Recovering Lost Facings in Modern Trade Chains
 - Household Care Brand Case: Building Visibility in Traditional Grocery Outlets
 - Annual Promotion Calendar Build with Funding Envelope and Event Sequencing
 - Trade Marketing Plan Assembly: Channel Priorities, Perfect Store Targets and KPI Dashboard
 - Plan Defence Before a Commercial Leadership Panel
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Skills You Will Gain:

- Shopper Insight Analysis
- Pack-Price Architecture
- Perfect Store Auditing
- Planogram Compliance Checking
- Trade Promotion Planning
- Promotion Post-Evaluation
- Trade Spend Control
- Promotion Calendar Scheduling

Why Attend This Course:

- Return with a Trade Marketing Plan with Promotion Calendar tested on a realistic FMCG case
- Explain why a promotion lifted volume but lost money, using baseline, cannibalisation and forward-buying evidence
- Brief field teams with a perfect store scorecard they can check outlet by outlet
- Compare shelf and promotion practice with peers from food, beverage, personal care and household care brands

Conclusion:

Brands grow at the shelf when shopper insight, pack-price choices, in-store standards and promotion spend work as one plan. The week moves from FMCG category economics and the shopper versus consumer distinction, through portfolio roles, pack-price ladders and path-to-purchase mapping, to outlet segmentation, perfect store scorecards and planogram compliance, and then to promotion mechanics, post-event ROI and trade terms. The final day applies these methods to beverage and household care cases, producing a Trade Marketing Plan with Promotion Calendar ready for commercial review.
