207 ANALYTIX

Pre-Shelf Demand Validation

Why the Retail Industry's Data Pillars Leave New Products Unmeasured Before Launch

Cross-Platform White Paper 1 of 5

Prepared by Afferent | November 2026

Executive Summary

Retail market intelligence has historically rested on four pillars: point of sale (POS), supply chain, consumer panels, and shopper loyalty data. Each measures activity that has already occurred inside an existing retail relationship. None can tell a new brand whether shoppers want its product before the brand has secured shelf space. Concept tests help with the idea, but not with the store. This pre-shelf gap is the reason new products need a different kind of evidence.

The Pillars, and What They Cannot Do

SOURCE	WHAT IT TELLS YOU	WHY IT CANNOT HELP A PRODUCT NOT YET ON SHELF
Point-of-sale data	What sold, at what price, and when.	Needs a product already transacting at a register.
Supply chain data	How goods move from manufacturer to shelf.	Needs an existing supply relationship with a retailer.
Consumer panels	Sampled consumer behavior.	Reports at market and banner level, and looks backward by design.
Loyalty card data	Purchases tied to enrolled members.	Only informative for products already being bought.
Concept tests	Whether shoppers like an idea.	Does not say where those shoppers shop, or which stores to start with.

Each source answers a version of "what happened after this product reached a shelf?" For a brand still trying to get onto that shelf, that question is premature.

Why It Matters to a New Brand

An established brand walks into a buyer meeting with POS and loyalty data from comparable stores. A new brand has no such history. Industry estimates put new CPG product failure at 60% to 85%. Committing scarce capital to production runs, listing costs, and inventory before demand is shown is one commonly cited reason.

A Retail Sell-In Sprint sits in this gap. The brand's own audience requests specific products at stores they use. Afferent verifies each request, matches it to a real door, and delivers a Merchant Pitch Deck. The buyer sees forward-looking, location-specific evidence of local demand, from verified opted-in shoppers rather than follower counts.

Complement, Not Replace

Afferent does not compete with the four pillars or with concept testing. Once a product is on shelf, POS, panel, and loyalty data measure what happens next. A Sprint covers the step before that. Positioning around the gap, rather than against established providers, is deliberate: it addresses an earlier stage of the retail lifecycle those sources structurally cannot serve.

> Declared shopper interest is not a purchase. A Sprint helps a brand make its case; it does not guarantee a listing or sales.

Sources: Nielsen data as reported by FoodNavigator (E. Watson, 31 July 2014); Catalina, via Chain Drug Review (22 August 2015). Estimates vary by source and definition.

Prepared for internal and prospective-client review by 207 Analytix. Afferent Signal is operated by 207 Analytix LLC. Prices, coverage and figures are as of 1 November 2026 (store coverage as of 24 October 2026) and may change. Revenue-at-risk figures are modeled estimates built on stated assumptions, not forecasts or guarantees. Declared shopper interest is not a completed purchase and does not guarantee a retail listing or sales.