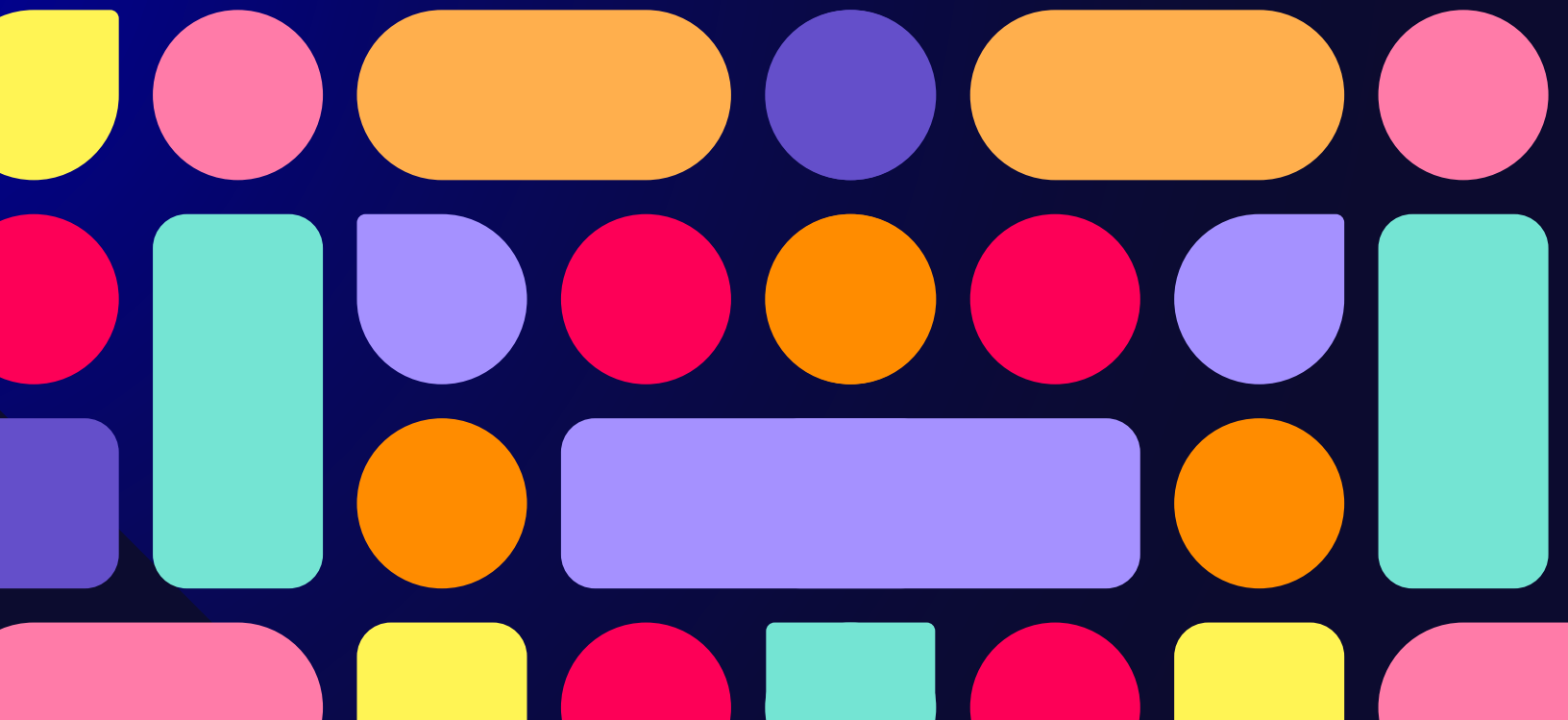


# BRANDWIDTH

2026

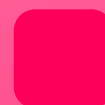
The State of Creative Operations  
in Grocery Retail Promotions





# The Scale of the Problem

Production at grocery-retail volume, under a promotional window that does not move.



Grocery retail promotional production is one of the most operationally demanding content challenges in marketing.

A single promotional campaign can span hundreds of store locations, multiple markets and languages, dozens of format types, and hundreds of individual asset variants. All of it produced against a fixed commercial window that does not move.

To understand the scale of the challenge, **Brandwidth 2026 surveyed 256 marketing leaders directly involved in promotional production across grocery retail organizations** in the United States, United Kingdom, France, Germany and the Netherlands.

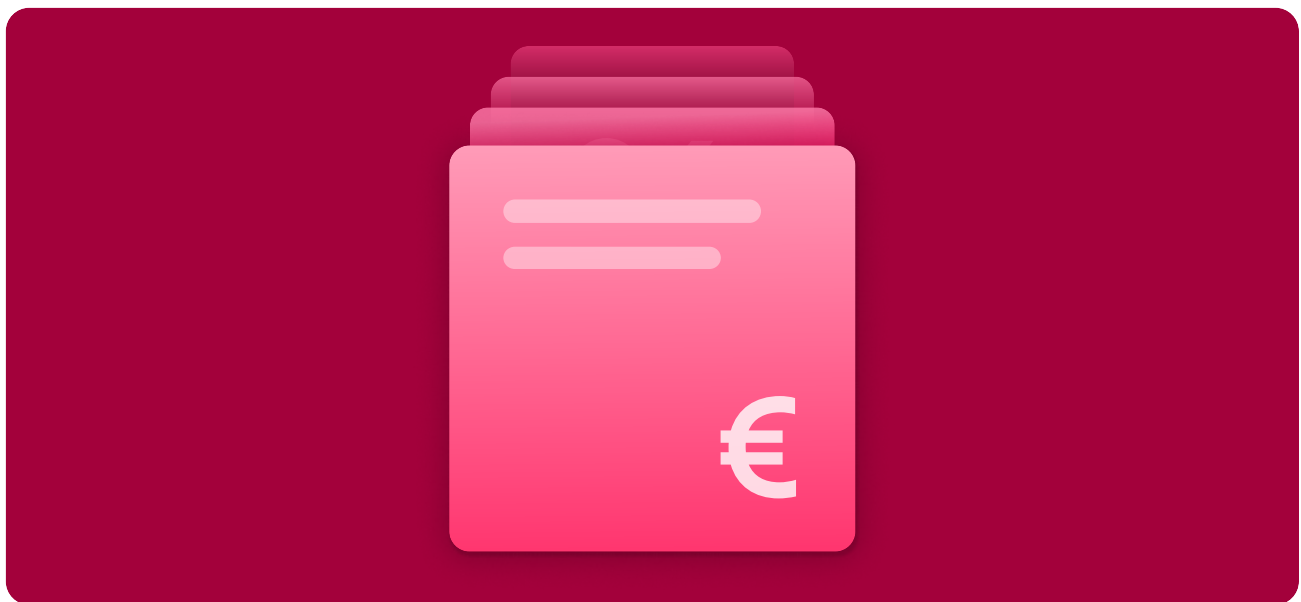
The picture that emerges is one of significant operational complexity, managed largely through hybrid production models that place considerable pressure on central creative teams.

## How production is organized

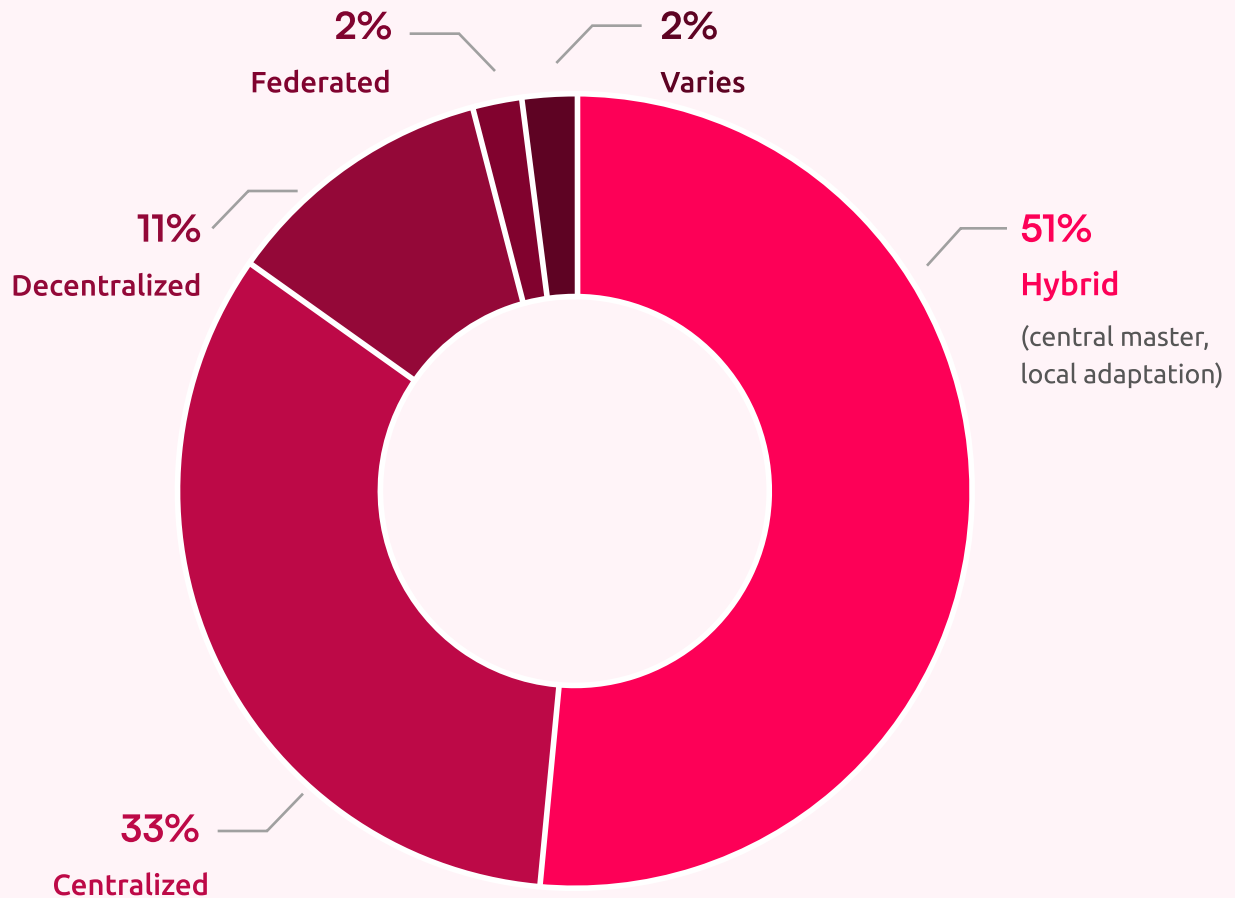
Most grocery retail marketing teams (51%) operate a hybrid production model, in which central teams produce master campaign assets and local teams adapt them for their specific market, store format or region.

A further 33% operate a fully centralized model, in which the central team produces all materials and distributes them to markets. Only 11% describe their production as primarily decentralized, with local or regional teams producing their own materials within brand guidelines.

*The 51% hybrid model is not a choice — it is a compromise.*



How would you describe the typical journey from approved promotional brief to live materials across your store estate?



**The dominance of the hybrid model reflects the structural tension at the heart of grocery retail promotional production:** the need for brand consistency and production quality at the center, combined with the need for local relevance and speed at the market level.

As subsequent sections of this report make clear, that tension is rarely resolved cleanly in practice.

## The Volume of Work

The production volumes involved are substantial.

When asked how many individual format and market variants a typical promotional campaign requires, **57%** of respondents indicated between 50 and 200 variants.



A further **21%** reported between 200 and 500 variants per campaign. Only **21%** of respondents work at volumes below 50 variants per campaign, a profile largely limited to locally-operated, single-market retailers.

**Campaign frequency compounds this volume challenge.**

More than half of respondents

**86%**

**run between three and ten promotional campaigns per month.**

A further **4%** run more than ten campaigns per month.

For a team producing 50 to 200 variants per campaign across three to ten campaigns per month, the aggregate production load is considerable by any measure.

## The geographic reach of campaigns

**34%**

**of respondents run campaigns across multiple countries simultaneously.**

For this group, the production challenge is multiplied by the requirements of localization: language adaptation, regulatory compliance, market-specific pricing and promotional mechanics. Each of these adds complexity, approval steps and production time.



## The people involved

Production at this scale requires significant human resources.

When asked how many designers, including in-house staff, agency partners and freelancers, are typically involved in producing a promotion, responses varied considerably by organization size and campaign scope.

The picture that emerges consistently is one of production teams stretched across multiple workstreams simultaneously, with limited capacity to absorb additional volume or respond to last-minute changes without disruption.

**That capacity constraint is not incidental to the findings that follow. It is their foundation.**

## NEXT: Part 2

### Where the Promo Production Process Breaks Down



2 •

# Where the Promo Production Process Breaks Down

Three fault lines run through grocery retail promotional production: speed, consistency, and error exposure.



The production volumes described in the previous part are not exceptional. They are the normal operating conditions of grocery retail marketing.

What Brandwidth 2026 reveals is that the processes most teams use to manage those conditions are not keeping pace with the demands placed on them.

**The breakdowns are not dramatic or sudden. They are structural, recurring and largely accepted as the cost of doing business.** They should not be.

The research identifies **three distinct fault lines in grocery retail promotional production: Speed, Consistency and Error Exposure.**

Each is significant on its own. Together, they describe a production system that is under sustained pressure with limited structural resilience.



## Speed: the approval problem

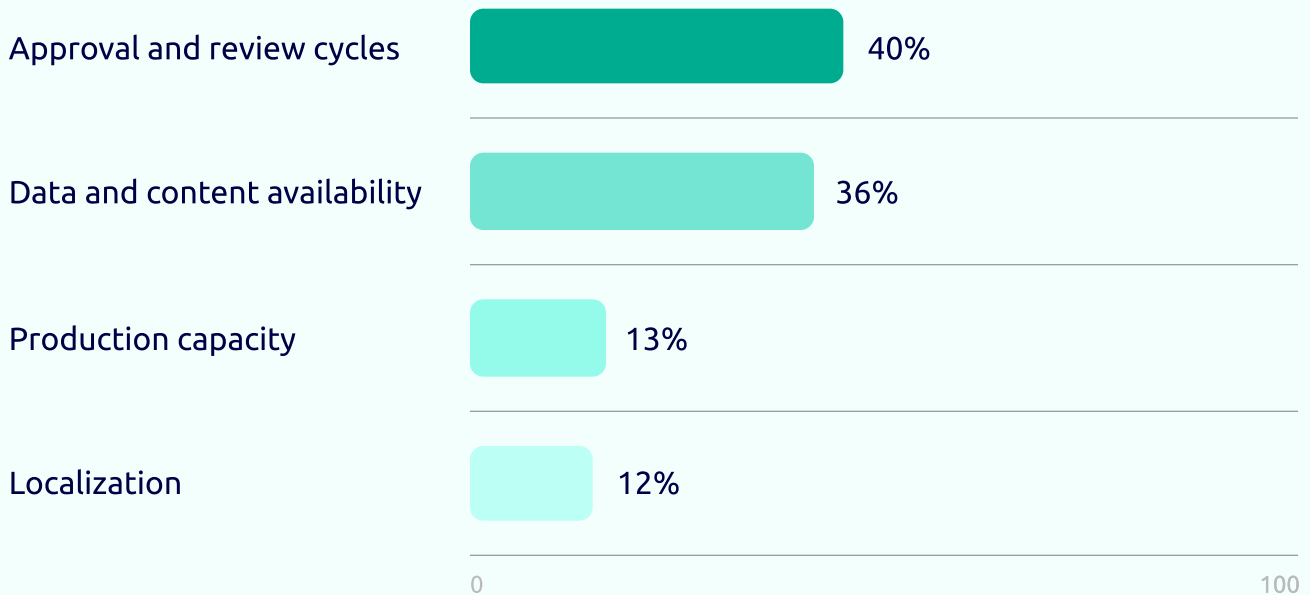
When asked to identify the single biggest constraint on how fast they can move a promotion from approved brief to live execution across all markets, two factors emerged as effectively tied at the top.

Approval and review cycles were named by 40% of respondents, while data and content availability, meaning late-arriving pricing, product information, or assets, was cited by 36%.

With only 4.3 points separating them, these are the twin bottlenecks defining promotional speed.

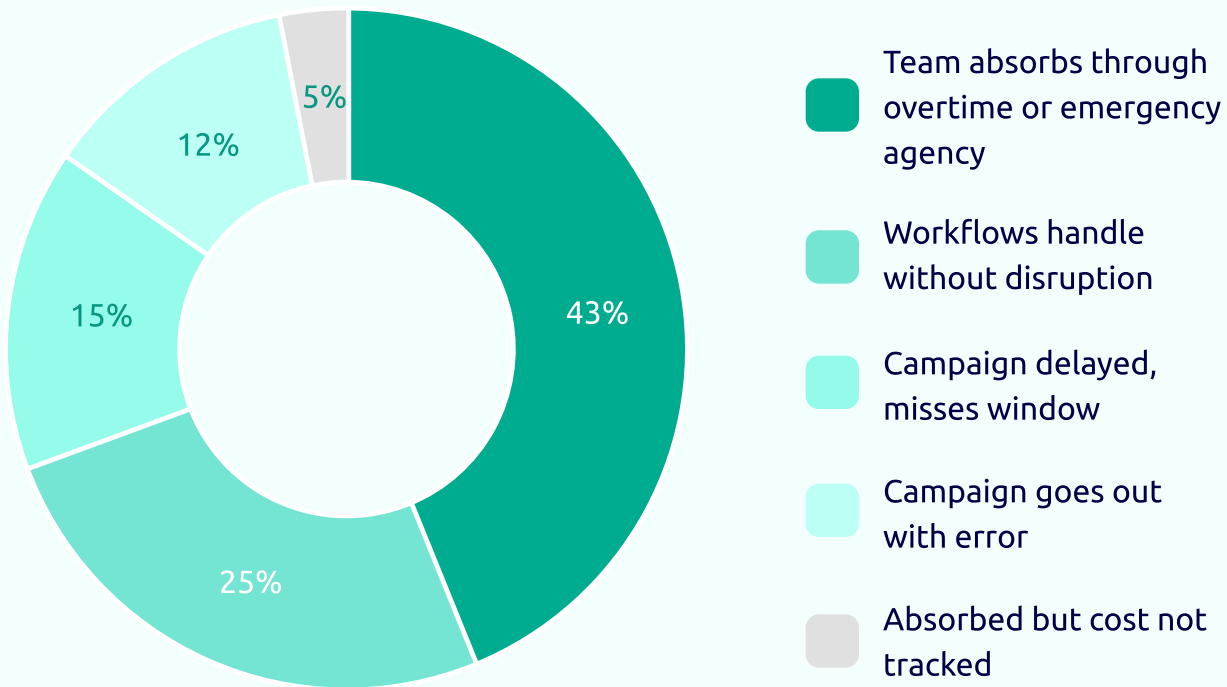
Production capacity, by comparison, was named by just 13% of respondents, a distant third.

## What is the single biggest constraint on how fast you can move a promotion from approved brief to live execution across all markets?



Among respondents running campaigns across four or more markets, the approval cycle problem is consistently more acute. The centralized governance structures that exist to protect brand standards become, in practice, the primary source of production delay. When a promotional deadline is at risk due to a last-minute change, a price update or a product swap, 43% of respondents report that the team absorbs it through overtime or emergency agency support.

### When a promotional deadline is at risk due to a last-minute change, what typically happens?



A further 15% report that the campaign is delayed, missing the promotional window entirely.

12% report that the campaign sometimes goes out with the error or outdated information.

Only 25% say they have workflows in place that handle this without significant disruption. That final figure is worth pausing on.

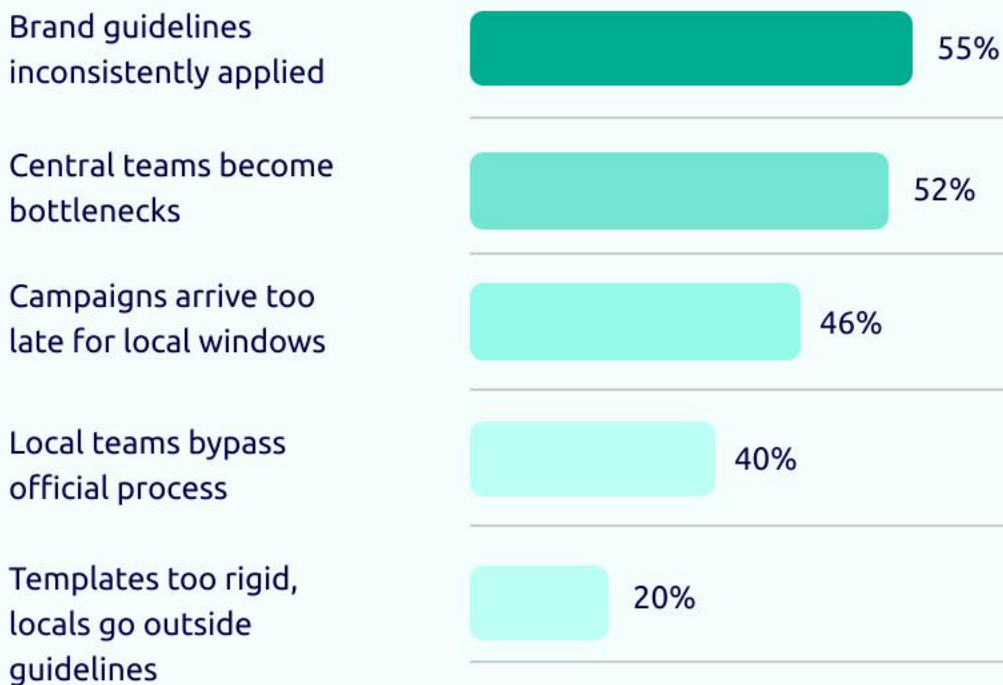
*Three in four grocery retail marketing teams do not have a reliable process for managing last-minute changes.*

## Consistency: the local speed problem

The hybrid production model that dominates grocery retail carries a structural vulnerability that the research makes visible.

When central teams are the primary source of production, they become a dependency for every local market that needs adapted materials. And when those local markets are operating under time pressure, with promotional windows that cannot move, the dependency becomes a bottleneck.

### Where does the tension between central brand consistency and local market speed most often break down for your team?



Respondents could select more than one answer.  
Percentages do NOT sum to 100.

52% of respondents say that central teams become bottlenecks that local markets work around. 40% say that local teams bypass the official process entirely and create their own materials. 55% say that brand guidelines are inconsistently applied across markets and stores.

These three findings are connected. The sequence is predictable: central teams slow down under volume pressure, local markets begin working around them to meet their own deadlines, and brand consistency deteriorates as a result.

**The governance structure that was designed to protect the brand becomes the reason the brand is inconsistently represented.**

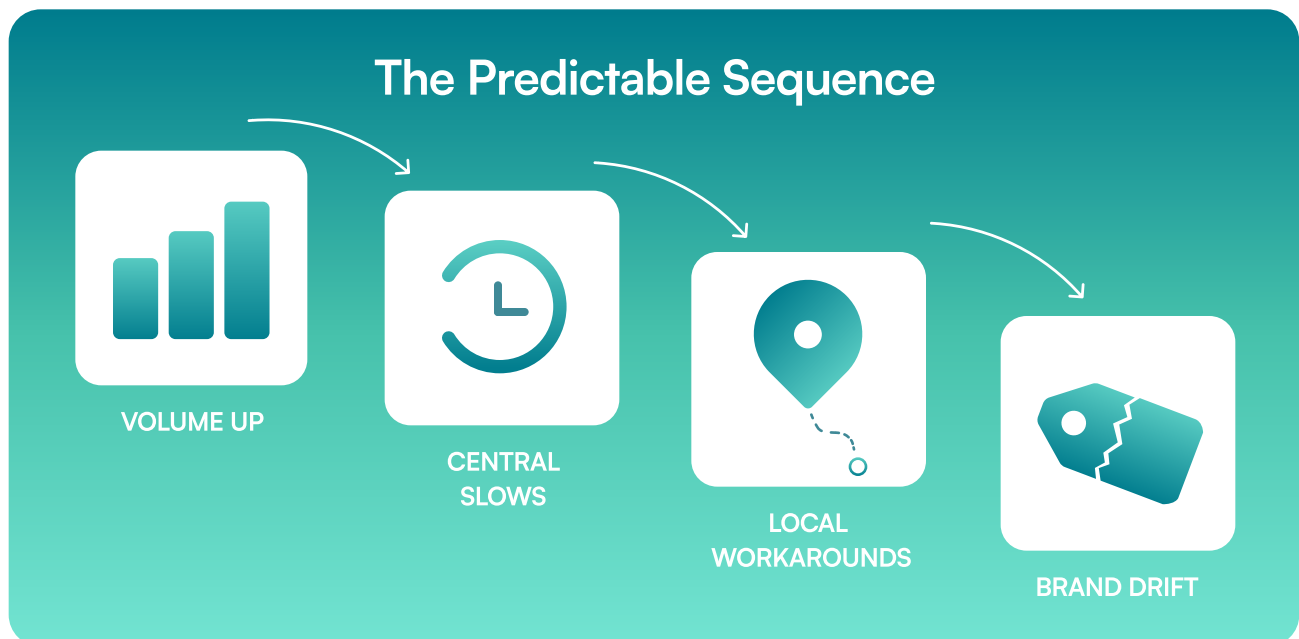
46% of respondents also report that campaigns arrive too late to be relevant for local promotional windows. For an international operator running time-sensitive promotional campaigns across multiple markets simultaneously, late delivery is a direct commercial cost.

20% of respondents say that templates are too rigid, meaning local teams cannot adapt within guidelines and so go outside them.

**This finding points to a design problem as much as a process problem.**

When the tools available to local teams do not allow legitimate adaptation, illegitimate adaptation follows.

**When legitimate adaptation is not possible, illegitimate adaptation follows.**



## Error exposure: the reliability gap

The most significant finding in Brandwidth 2026 concerns not what sometimes goes wrong, but what reliably goes right.

71%

of grocery retailers experienced a promo production failure recently

11%

say their process reliably prevents the next one

When asked whether their team had experienced a production failure in the last two years, a pricing error, an incorrect product, or a missed regulatory requirement, 71% of respondents said yes. 13% reported material financial or legal consequences. 58% reported consequences that were manageable but real.

**Only 11% of respondents said their current process reliably prevents this.**

The implications are significant. A production failure in a multichannel promotional campaign is not contained to a single format or a single market.

A pricing error that enters the production pipeline propagates across every variant derived from the affected template: print, digital, animated, every format, every market, every store.

## NEXT: Part 3

## The Business Cost

3 •

# The Business Cost

The true cost of promo production failure is not operational.  
It is commercial.



Operational disruption is the visible face of promotional production failure. Overtime absorbed, deadlines missed, variants rebuilt, approval cycles restarted. These are the costs that production teams live with and that rarely appear in a budget line or a board report.

The findings of Brandwidth 2026 suggest that the true cost sits elsewhere.

When grocery retail marketing leaders are asked where the impact lands hardest when a campaign runs late or goes out with an error, the answer is not operational. It is commercial.

**The cost of promo production failure is not what the production team absorbs. It is what the business loses.**

When a promotional campaign runs late or goes out with an error, where does the impact land hardest in your organization?



Respondents could select more than one answer. Percentages do NOT sum to 100.

## The revenue consequence

60% of respondents say that when a promotional campaign fails, the impact lands hardest commercially: missed revenue from the promotional window.

For grocery retail, where promotional pricing drives footfall, basket size and competitive positioning, a missed or delayed promotional window is a direct revenue event.



A campaign that arrives late misses its window entirely. The revenue that window was designed to generate does not move to the following week. It is gone. For large-format retailers running multiple promotional cycles per month across hundreds of stores, **the aggregate revenue exposure from consistently late or failed campaigns is substantial.**

It is also largely invisible in the way organizations account for production costs, because missed revenue does not appear as a line item. It appears as underperformance against a commercial target, with the root cause rarely traced back to the production process that created it.

*Missed revenue does not appear as a line item. It appears as underperformance against a commercial target.*

## The legal and regulatory exposure

33% of respondents report that when campaigns fail, the impact includes legal or regulatory exposure from incorrect pricing or non-compliant materials.

This finding is particularly significant for international operators, for whom regulatory requirements vary by market and where the consequences of non-compliance can include fines, mandatory corrections and reputational damage.

A pricing error in a digital campaign can be corrected with a content management update. A pricing error in a print run cannot. It requires a recall, a reprint, and in some markets a formal correction process.

The cost of a single print error at scale, across thousands of store locations, can run to multiples of the original production budget.



## The FMCG partner relationship

30% of respondents report that production failures damage relationships with FMCG brand partners.

Grocery retailers sell promotional slots to FMCG brands as retail media inventory. A promotional slot is a commercial commitment: the retailer undertakes to deliver a campaign, at a specified quality, across a specified footprint, within a specified window.

**When promo production failures cause that commitment to be delivered late, incorrectly or inconsistently, the retailer is in breach of a commercial agreement with a paying client, not simply managing an internal operational problem.**

FMCG brands that experience repeated execution failures from a retail partner will redirect their promotional investment to partners with more reliable production capability.

## The brand consequence

52% of respondents report that **promo production failures** result in inconsistent or off-brand materials reaching customers.

This figure, considered alongside the finding in Part 2 that 55% of teams already report inconsistent application of brand guidelines in normal operating conditions, suggests that **brand inconsistency** is not an exceptional outcome of promo production failure. It is a persistent background condition that failures make acute.



For grocery retailers operating across multiple banners, formats and markets, **brand consistency functions as a commercial signal, not merely an aesthetic standard.**

Inconsistent execution across a store estate communicates operational fragility to shoppers and brand partners alike.

## The operational cost that does not appear on invoices

49% of respondents report that when campaigns fail, the operational impact lands on the team: burnout from absorbing volume and fixes.

This finding should be read alongside the finding from Part 2 that 43% of teams absorb last-minute changes through overtime or emergency agency support, every campaign, every time.

**49% say failures land operationally as team burnout from absorbing volume and fixes**

Teams that spend their capacity absorbing production failures have less capacity to invest in the workflow improvements that would prevent them.

Among those who reported significant incidents, the financial consequences were consistently described as disproportionate to the production cost that caused them.

Across the EU and US respondents who reported such an incident, the distribution makes the scale tangible — more than half of these cost events landed between €10,000 and €50,000, and over a quarter ran higher still.

Among EU and US respondents who reported a significant promo production incident, what was the approximate cost impact?

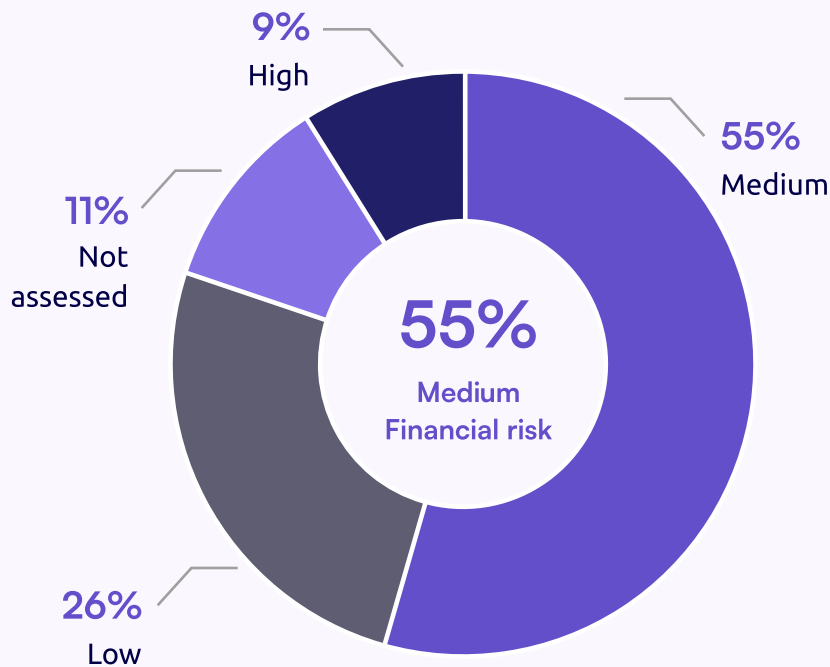


Over 1 in 4 incidents exceeded €50,000

## The financial risk assessment

When asked directly to characterize the financial risk attached to their current promotional production process, 55% of respondents described it as medium: occasional incidents with limited but real financial consequence. 9% described it as high, with errors or delays regularly creating measurable cost or revenue impact. Only 26% characterized their financial risk as low.

How would you characterize the financial risk attached to your current promotional production process?



11%

of respondents said they had not formally assessed this risk at all.

That final figure may be the most consequential in this section. **A promotional production process that carries measurable financial exposure, and that the organization has not formally assessed, is an unmanaged liability.** In the context of the findings presented throughout this report, the absence of formal risk assessment is not a reflection of low risk. It is a reflection of how normalized the risk has become.

## PROMO EXECUTION RISK CALCULATOR

# Is your production process carrying hidden financial risk?

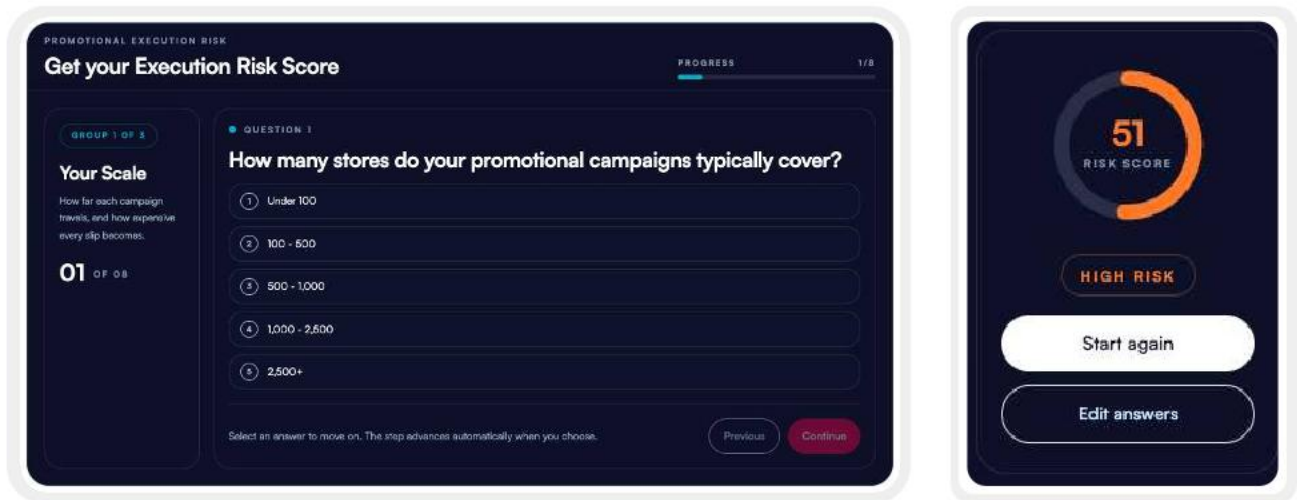
Answer 8 questions about how your team handles volume, approvals and last-minute changes. You'll see a personalized risk profile across three dimensions — revenue exposure, brand exposure, regulatory exposure — benchmarked against the full Brandwidth 2026 sample of 256 grocery retail marketing leaders.

Take the Risk Calculator →

[chili-publish.com/brandwidth-2026](https://chili-publish.com/brandwidth-2026)



The Promo Execution Risk Calculator uses the Bandwidth 2026 sample as its benchmark. It is free, anonymous, and takes approximately three minutes. Teams that complete it receive a written profile across the three exposure dimensions — revenue, brand, regulatory — with comparison data to peers of similar size and market footprint.



## NEXT: Part 4

### How Teams are Coping



4 •

# How Teams are Coping

Production at grocery-retail volume, under a promotional window that does not move.



## How teams are coping — setting up the topic

The findings presented in the preceding part describe a production system under sustained pressure.

This part examines how grocery retail marketing teams are responding to that pressure in practice: the workarounds, the compensating behaviors, and the structural adaptations that have become normalized across the industry.

The picture that emerges is not one of dysfunction. Most teams are delivering most of the time.

**The question Brandwidth 2026 raises is what that delivery is costing, and whether the coping mechanisms teams have stacked together are building resilience or creating a fragile balance that defers the consequences.**

### The fragile balance behind every campaign

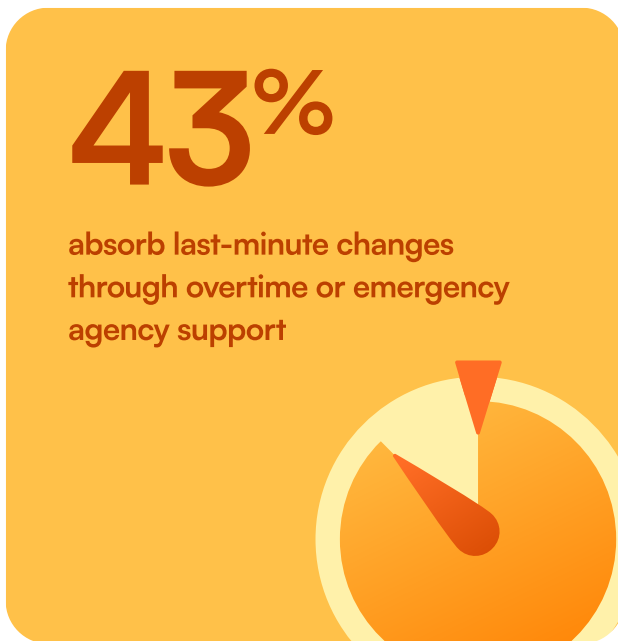


*Each card is a coping behavior teams absorb to keep promo production moving.  
The cost compounds with every campaign cycle.*

## Overtime and agency as a structural response

The most common response to production pressure in grocery retail is also the most expensive and the least sustainable.

43% of respondents report that when a promotional deadline is at risk, the team absorbs the disruption through overtime or emergency agency support.



This figure, examined in the context of campaign frequency, suggests that for many teams this is not an occasional response to exceptional circumstances. It is a recurring operational mode.

Emergency agency support carries its own costs beyond the financial.

Briefing an external resource under time pressure introduces new opportunities for error, compresses the approval window further, and creates a dependency on external capacity that the organization does not control.

Teams that rely on emergency agency support as a standard pressure valve are, in effect, **outsourcing their production risk to a third party that shares neither the accountability nor the brand knowledge of the internal team.**

*The most common response to production pressure in grocery retail is also the most expensive and the least sustainable.*



## Accepting delay as a cost of doing business

15% of respondents report that when deadlines are at risk, campaigns are delayed, missing the promotional window.

A further 12% report that campaigns sometimes go out with errors or outdated information.

Together, these figures suggest that for more than one in four grocery retail marketing teams, the accepted response to production pressure is either to miss the window or to ship with known deficiencies.

15%

delay the campaign missing the window

12%

ship the campaign with errors or outdated information

*More than one in four teams treat delay or error as a tolerable outcome.*

This normalization of delay and error is perhaps the most consequential finding in the coping behaviors data.

A team that has accepted late delivery or error as an occasional but tolerable outcome has, in effect, set a lower operational standard than the one its commercial obligations require.

## The automation gap in multichannel production

Among the 34% of respondents who run campaigns across multiple countries simultaneously, the automation picture is mixed.

13% describe their content production process for multichannel campaigns as largely manual, requiring significant human effort per market.

44% describe it as partially automated, with manual work remaining.

42% describe it as mostly automated, running with minimal manual intervention.

## How automated is your content production process for campaigns running across multiple markets?



*Nearly half of cross-country operators are stuck in the partial-automation middle.*

The partially automated category deserves particular attention. Partial automation in a multichannel production environment typically means that the high-volume, low-complexity tasks have been automated while the complex, high-risk tasks — including data-driven variant production, localization, and regulatory adaptation — remain manual.

This is precisely the configuration that maximizes error exposure: the volume problem is addressed, but the accuracy problem is not.

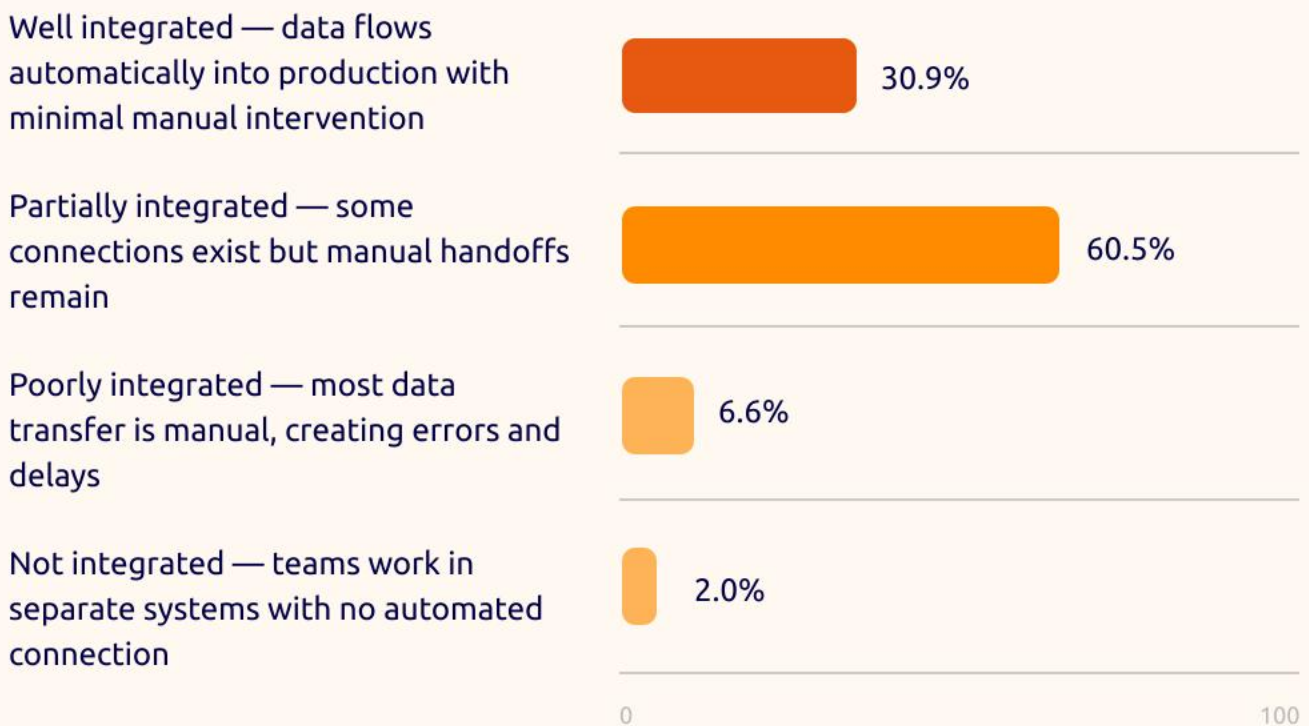
### Partial Automation

A production configuration where repetitive, high-volume tasks are automated, but the complex, high-risk tasks remain manual.

## The systems integration gap

When asked how well their current production stack connects content and data systems — including CRM, DAM, PIM and pricing tools — to the creative tools their teams work in, respondents painted a picture of significant disconnection.

### How well does your current production stack connect your content and data systems to the tools your creative team works in?



### Six in ten teams run partially-connected stacks.

The majority described their stack as **partially connected at best**, with manual steps required to move data from source systems into production workflows.

This gap has direct consequences for the error exposure findings described in Part 2. A production process that relies on manual data transfer introduces a human decision point at every transfer. Each decision point is an opportunity for error.

At the volumes described in part 1, the cumulative error exposure from a disconnected production stack is substantial.

**Each decision point is an opportunity for error.**

### What teams are not doing

Perhaps as revealing as what teams are doing is what they are not doing.

11% of respondents said they had not formally assessed the financial risk attached to their current production process.

Among teams that reported production failures with manageable consequences, the proportion that had made structural changes to their workflow as a result is not captured in the data, but the recurrence of near misses and incidents across the respondent base suggests that incident response, rather than root cause resolution, is the dominant organizational reaction.

Teams that absorb production failures as a cost of doing business, without examining the process conditions that produced them, are likely to continue absorbing them.

**The coping mechanisms described in this Part are rational responses to immediate pressure. They are not solutions to the underlying problem.**

PROMO EXECUTION  
RISK CALCULATOR

**Is your production process carrying hidden financial risk?**

Take the Risk Calculator →

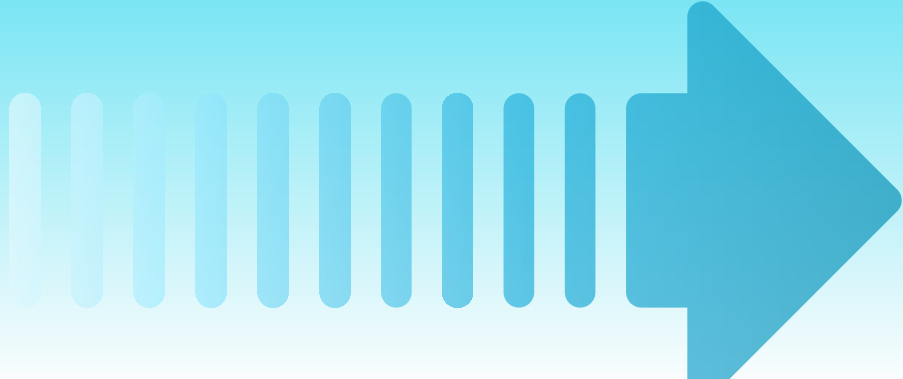
**NEXT: Part 5**

**What Comes Next**

5 •

# What Comes Next

The technology is no longer hypothetical.  
The conversation has moved to scope.



## The direction of travel

The production pressures described in the preceding part are not new.

**Grocery retail marketing teams have been managing high-volume, high-complexity promotional production under time pressure for years.**

What is changing is the industry's expectation of what technology can do about it, and the pace at which that expectation is translating into action.

Brandwidth 2026 asked respondents about their current exploration of AI and automation capabilities, their expectations for the automation of their production processes over the next three years, and the specific problems they most want technology to solve.

The findings describe an industry that is alert to the opportunity, uneven in its progress, and broadly optimistic about the direction of travel — while remaining candid about the distance still to cover.

*The conversation about AI in grocery promo production has crossed a line. The question is no longer whether, but how much, how soon, and on which parts of the work AI will be applied.*

89%

of grocery promo production teams have already used at least one AI capability.



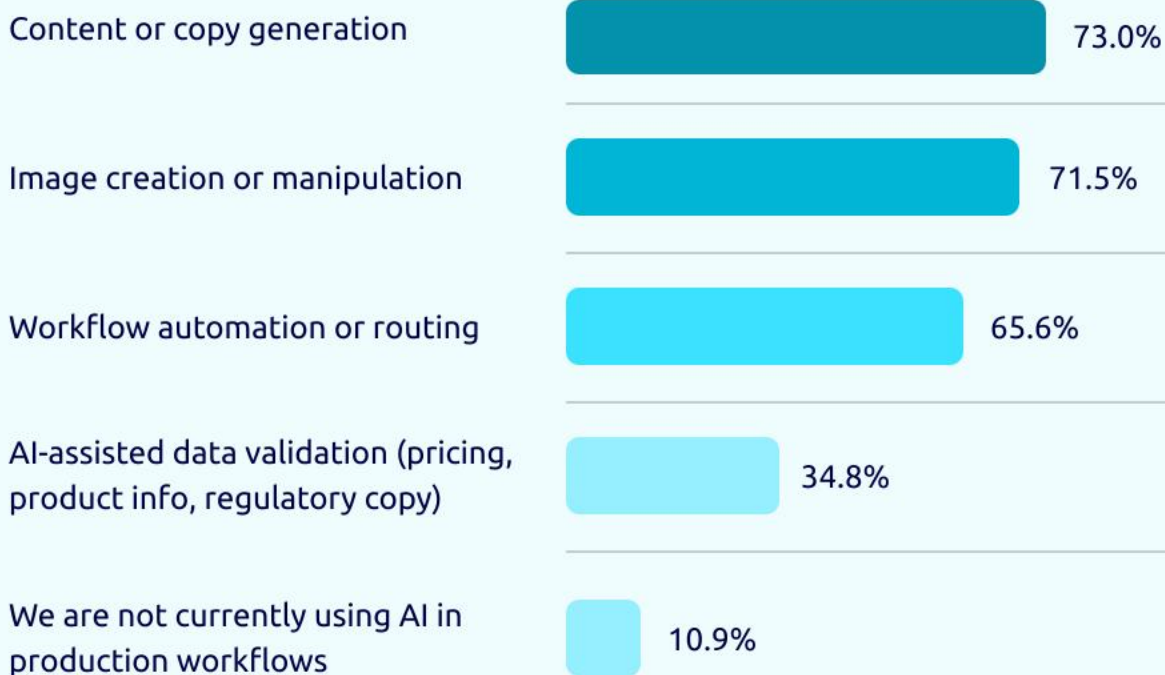
## What teams have already explored

The majority of respondents have engaged with AI capabilities in some form, even if informally. Content and copy generation is the most widely explored category, followed closely by image creation, workflow automation, and AI-assisted data validation.

**Only 11% of respondents report that they are not currently using AI in their production workflows in any capacity.**

## Which of the following AI capabilities has your team explored or piloted, even informally?

(Respondents could choose more than one option.)



*Nine in ten teams are already working with AI in some form.*

## The priority is accuracy, not speed

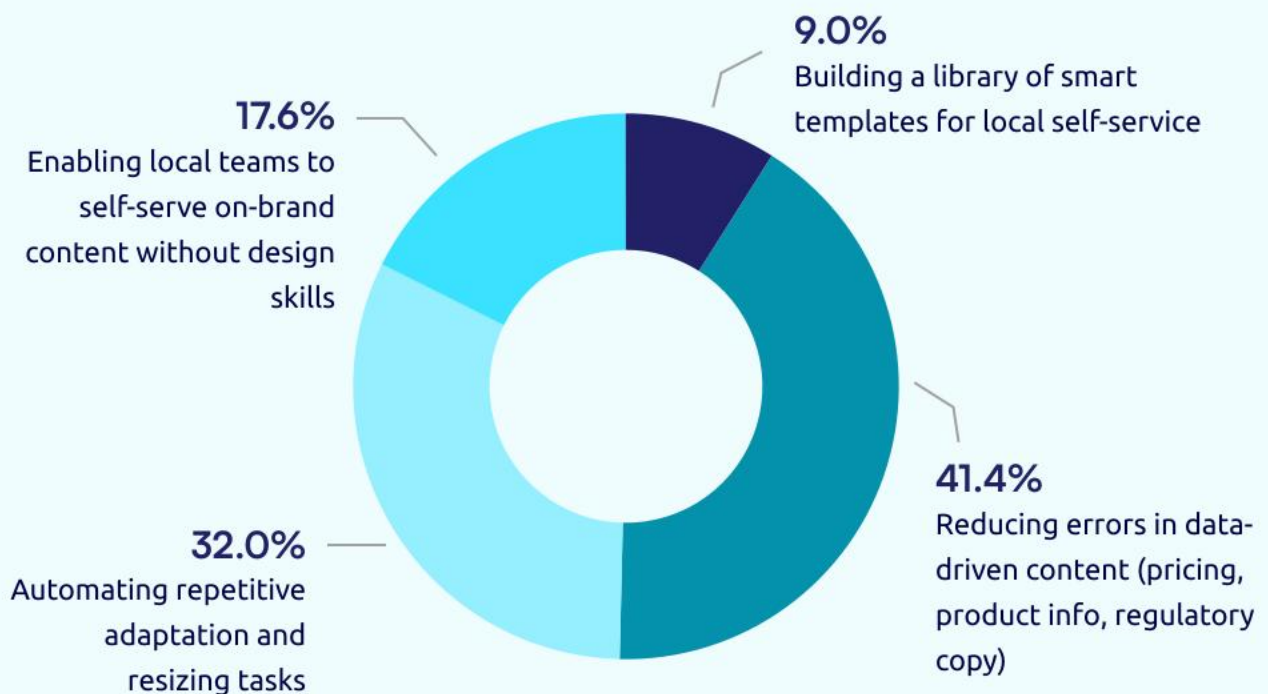
When asked which production problem they would most want AI to solve for their team in 2026, **41% of respondents named the reduction of errors in data-driven content (pricing, product information, regulatory copy).**

32% named the automation of repetitive adaptation and resizing tasks.

18% named enabling local teams to self-serve on-brand content without design skills.

9% named building a library of smart templates for local self-service.

Which production problem would you most want AI to solve for your team in 2026?



*Teams want AI to make their output more accurate before they want it to make it faster.*

The prioritization of error reduction over task automation is a notable finding. It suggests that for grocery retail marketing leaders, **the most pressing AI use case is not speed or efficiency in the abstract. It is accuracy at scale.**

The production failures described in Part 2, and the commercial consequences described in Part 3, appear to have shaped a clear view of where AI investment would deliver the most immediate and tangible value.

## The three-year automation outlook

When asked what percentage of their campaign design process they expect to be automated within three years, respondents were notably consistent in their expectations.

42% anticipate that around half of their process will be automated.

A further 42% anticipate around a quarter.

Only 15% expect automation to reach 75% or more of their process within that timeframe.



# 84%

expect part of their campaign design process to be automated within three years

### RESPONDENTS WHO CHOSE...

“~a quarter of my process”



“~half of my process”



*Respondents are not anticipating the elimination of human creative judgment from their promo production process.*

The clustering around the 25% to 50% range reflects a pragmatic rather than utopian view of automation's near-term role.

Respondents are not anticipating the elimination of human creative judgment from their production process. They are **anticipating the automation of the high-volume, rules-based, data-driven elements of promo production**: the variant generation, the localization, the format adaptation, the data population.

## The transition gap

The optimism about automation's potential sits alongside a candid acknowledgment of the current state.

Among respondents running multichannel campaigns across multiple markets, fewer than half describe their current production process as mostly automated. The majority remain in a partially automated state, managing a hybrid of automated and manual processes that, as noted in Part 4, often concentrates the remaining manual work at the highest-risk points in the production chain.

The transition from partial to mostly automated production is not primarily a technology problem.

The tools to automate data-driven variant production, connect source systems to creative workflows, and enable local self-service within brand-governed parameters exist and are in use by leading operators in the industry.

### The transition challenge is

**organizational**: the workflow redesign, the template investment, the change management, and the stakeholder alignment required to move from a people-dependent production model to a system-dependent one.

#### System-dependent production



#### People-dependent production



For teams that have normalized their current coping mechanisms, the perceived cost of transition can feel higher than the perceived cost of continuation.

The data in this report suggests that perception is incorrect. The cost of continuation — measured in overtime, missed windows, error remediation, FMCG partner friction and brand inconsistency — is already substantial. It compounds with every campaign cycle, every peak season, every market added to the operational scope.

**The cost of continuation is already substantial. It compounds with every campaign cycle.**

## The window for action

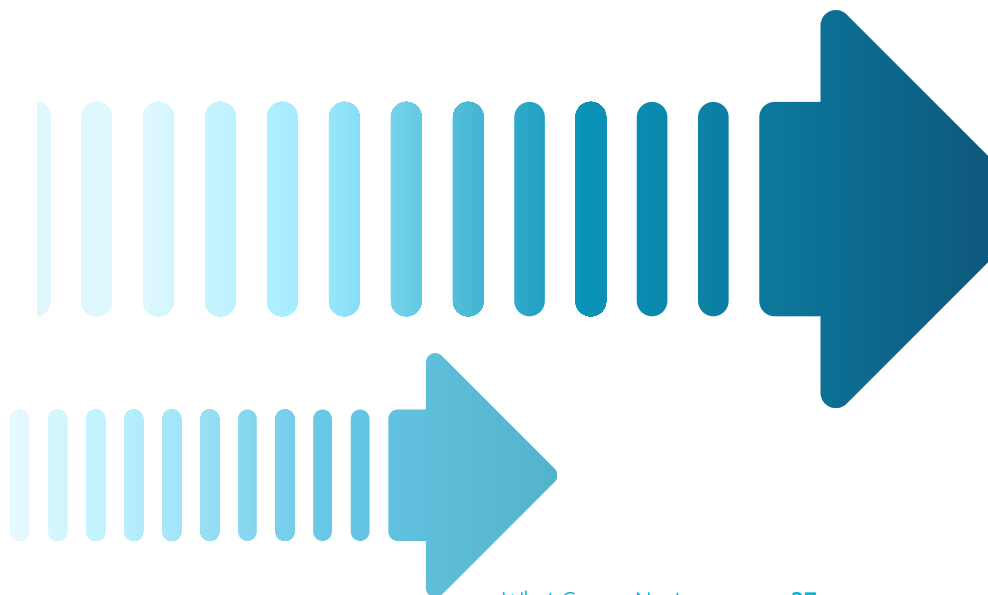
The grocery retail leaders surveyed for Brandwidth 2026 are not waiting passively for automation to arrive. They are actively exploring AI capabilities, forming clear views about where technology should be applied first, and setting concrete expectations for the pace of change.

The question most of them are navigating is not whether to automate, but **how to sequence the transition without disrupting the production output** their commercial calendars require.

That sequencing question has a time dimension that the data makes visible. Peak seasons do not wait for workflow transformation programs to complete. The teams that enter the next peak season with the same production process they used for the last one will manage that peak the same way: with overtime, emergency agency support, and the acceptance of some degree of delay or error as an operational inevitability.

The teams that will manage it differently are those that have already begun the transition: investing in connected production infrastructure, building template libraries that support governed self-service, and moving the locus of production risk from people to systems.

*Moving the focus of production risk from people to systems.*



About CHILI publish

# The creative automation platform built for grocery retail.

CHILI publish is the company behind CHILI GraFx, the creative automation platform built to tackle high-volume, multichannel graphic production at scale.

CHILI GraFx connects data systems — PIM, DAM, pricing tools and CRM — directly to Design Systems that generate brand-compliant campaign variants automatically, at any volume, across any channel or market. Local teams adapt within brand-governed parameters without design skills or central-team dependency.

*Trusted by global retail brands*



Talk to an expert →

Learn more