



# Case Study

Kimberly-Clark

## SCOTT COMPACTO

# the Bathroom Tissue Industry



# Initial Scenario for the Bathroom Tissue Industry

- Over 250 brands compete in the Brazilian market;
- 85% of the market comprises lower price 1-ply bathroom tissue;
- Customers are very price-orientated;
- Price and produce attributes are highly correlated.

# Hot spots identified during field work

- Very large country with poor transportation infrastructure
- Brand differentiation on gondola displays is virtually impossible
- Bulky products requiring large transport and storage volumes
- Only the 4-roll pack fits the average supermarket bag size

# The Existing Industry



# “Comfort and Ease at a Great Price”





CATEGORY: BATHROOM ISSUE

COUNTRY: BRAZIL

YEAR: 2008

NEW SCOTT  
COMPACTO



“Just give it a hug and  
it’s ready to use!”

# Alignment of Value, Profit, People Propositions

## Customer:

- Softness at a fair price
- Easy to find the product in the store
- Easy to carry and easy to store at household

## Kimberly-Clark:

- High sales and margin potential
- Less storage and transportation space required
- Viewed as an innovator – this creates more leverage with the trade and the public

## Traders:

- High added value per m2 on the gondola
- Distribution reduction cost
- Less storage space required