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Original Paper

A Review of Patterns of Competitive Dynamics in Twenty-Four U.S. Consumer Markets. Part IV: Personal Hygiene

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Abstract

This appraisal is an attempt to review the patterns of competitive dynamics in 24 U.S. consumer markets. These markets can be divided into five *broad categories:*

(1) Food Group--Discretionary (2) Food Group—Non-Discretionary (3) Personal Grooming (4) Personal Hygiene (5a) Laundry and Dishwashing Detergents, and (5b) Household Cleaning and Alkaline AA Battery.

This is the fourth of five papers that covers five markets in the Personal Hygiene Group.

1. Introduction

The genesis of this research goes back to the paper: *"Market Segmentation: An Integrated Framework"* (Datta, 1996).

Every market has *two* sides: demand and supply, customers and suppliers. It is only when the two sides *interact* that a market develops. While this meaning of the term 'market' is widely accepted, marketers and strategists have traditionally adopted a rather *limited* view that is *demand*-oriented. They define market segmentation in terms of *customers*—with a focus on 'people' characteristics, e.g., demographics, social class. An opposite view, which may be called 'product' segmentation, is *supply*-oriented which *starts* with *product* characteristics, e.g., quality, price, benefits (*ibid*).

Barnett (1969) points out that the traditional marketing approach to market segmentation has not been very successful. So, he suggests an alternative that is more promising: one which *shifts* the primary focus *from* "*whom* you reach" to "*what* characteristics you build into the product" (*ibid*, *italics* added).

Thus, we need an *integrated* approach to market segmentation which includes *both* the demand and supply sides of the competitive equation, and where 'people' [customer] and 'product' characteristics are *not* mutually exclusive paths to market segmentation, but, rather, two sides of the *same* coin (Datta, 1996).

The basic premise of this article is that the *product* characteristics approach is both *easier* and a more *actionable* way of looking at how a market is—or can be—segmented than the traditional marketing approach. It focuses *both* on customer benefits or needs *and* the *resources* necessary to satisfy them (*ibid*).

This analysis is based on the notion that the path to market share leadership does *not* lie in lower price founded in *cost leadership* strategy, as Michael Porter (1980) suggests. Rather, it is based on the premise—according to the PIMS database research (Note 1)—that it is *customer*-perceived quality that is crucial to long-term competitive position and profitability. So, the answer to market share leadership for a business is to *differentiate* itself by offering quality *better* than that of the nearest competition (Datta, 2010a).

To make this idea *operational* requires *two* steps. The *first* is to determine *which* price-quality segment to compete in? Most consumer markets can be divided in three *basic* price-quality segments: *premium*, *mid-price*, and *economy*. These can be extended to *five* by adding two more: *ultra-premium* and *ultra-economy* (Datta, 1996).

The answer lies in serving the *middle* class by competing in the *mid-price* segment (Datta, 2010a, 2010b). This is the socio-economic segment that represents about 40% of households in America (Datta, 2011). It is also the segment that Procter & Gamble (P&G), the largest American multinational corporation, has successfully served in the past (Datta, 2010b).

The *second* step for a business seeking market share leadership is to *position* itself at a price that is *somewhat* higher than that of the nearest competition (Datta, 1996, 2010a, 2010b).

This is in accord with P&G's practice based on the idea that although higher quality does deserve a "price premium," it should *not* be excessive (Datta, 2010b).

A higher price offers *two* advantages: (1) It promotes an *image* of quality, and (2) It ensures that the strategy is both profitable and sustainable in the *long run* (*ibid*).

A *classic* example of price positioning is provided by General Motors (GM). In 1921 GM rationalized its product line by offering "a car for every purse and purpose"—from Chevrolet to Pontiac, to Oldsmobile, to Buick, to Cadillac. More importantly, GM *positioned* each car line at the *top* of its segment (Datta, 1996, 2010a).

A more recent and familiar example is the *economy* chain, Motel 6, which has positioned itself as "offering the *lowes*t price of any national chain" (Datta, 2025a).

Another example is the Fairfield Inn. When Marriott introduced this chain, it targeted it at the *economy* segment. And then it positioned Fairfield at the *top* of that segment (Datta, 1996, 2010b).

As mentioned above, *customer*-perceived quality is the most important factor contributing to the long-term success of a business. However, quality *cannot* really be separated from price (Datta, 1996). Quality, in general, is an intricate, multi-dimensional concept that is difficult to comprehend. So, consumers often use *relative* price—and a brand's *reputation*—as a symbol of quality (Datta, 1996, 2010b).

America is a deeply-divided nation, refuting the *myth*, long perpetuated by Conservatives, that America is a classless society (Datta, 2011).

The socio-economic *lifestyle* profile of America reveals *three* broad income groups, giving rise to *six* social classes. More importantly, the six social classes are *not* merely a statistical construct, but rather a picture of *reality* (Datta, 2011).

Income inequality in America has been going up unrelentingly from 1974 to 2018, *squeezing* the middle class. It has now widened so much that it *rivals* the highest level recorded in 1928 that led to the Great Depression of 1929 (Datta, 2011, 2022).

Contrary to popular belief, the *upper class* does *not* consist of the top 1% earners: but rather the top 0.5%, with the *Upper Middle Class* occupying the 80-99.5th percentile (Datta, 2011, 2022).

Finally, thanks to the extraordinary *generosity* of A.C. Nielson Co. for the invaluable U.S. *national* retail sales data for the following 24 consumer markets for 2008 and 2007, without which this entire research campaign would *not* have been possible:

- Men's Shaving Cream, Beer, Shampoo, Shredded/Grated Cheese, Refrigerated Orange Juice, Men's Razor-Blade, Women's Razor-Blade, Toothpaste, Canned Soup, Coffee, Potato Chip, Alkaline AA Battery, Facial Tissue, Toilet Paper, Paper Towel, Disposable Diapers, Sanitary Pads, Automatic-Dishwasher Detergent, Hand-Dishwashing Detergent, Household Liquid Non-Disinfectant Cleaner, Heavy-Duty Liquid Laundry Detergent, Deodorant, Cola Carbonated Beverage, and Non-Cola--Lemon-Lime Regular Carbonated Beverage

For each of these 24 markets, we used Hierarchical Cluster Analysis to test two hypotheses: (I) That the market leader is likely to compete in the *mid-price* segment and (II) That its unit price is likely to be *higher* than that of the nearest competition.

These markets can be divided into *five* broad categories:

- (1) Food Group--Discretionary (2) Food Group—Non-Discretionary (3) Personal Grooming (4) Personal Hygiene (5a) Laundry and Dishwashing Detergents, and (5b) Household Cleaning and Alkaline AA Battery.

The focus of this paper, *fourth* in a series of five, is on the **Personal Hygiene Group**, that covers the following four consumer markets:

- The U.S. Toilet Paper Market
- The U.S. Disposable Diapers Market
- The U.S. Deodorant Market
- The U.S. Sanitary Pads Market

2. Research & Development (R&D) Strategy

Ansoff & Stewart (1967; Datta, 2010b) have proposed an elegant scheme of R&D strategy for a technology-based business:

- (1) "First to market"
- (2) "Follow the leader"
- (3) "Application engineering"
- (4) "Me too"

They suggest that a business seeking market share leadership has a choice of *two* R&D strategies: either "first to market" or "follow the leader" (*ibid*).

Part A. The U.S. Toilet Paper Market

The U.S. Toilet Paper market had retail sales of $4.1 Billion in 2008.

1. A Short History of the U.S. Toilet Paper Industry

What did people do *before* toilet paper?

According to National Geographic, hundreds of millions of people around the world, especially in Asia and Middle East, do *not* use toilet paper. Instead, they finish their bathroom visit with a "clean rinse of *water*" (Datta, 2023b).

However, they use *water* with their *left* hand for cleaning their behinds. As such, it is considered an *insult* to offer the left hand for a handshake (*ibid*).

Unlike the Western countries, open-flushing *squat toilets* are extremely common in countries in Southeast Asia, Central America, and Africa. A big benefit of such a toilet is that a deep and full squat is the ideal, and most *natural* position for pooping. *Squatting* when pooping has been shown to provide a more *optimal* angle for the anorectal cavity than sitting (Datta, 2023b).

In Ancient Rome, people did not have the luxury of a toilet at home. So, they used *public* bathrooms that were *dirty* and uncomfortable. Those bathrooms also *lacked* privacy, because they did not have toilet dividers (*ibid*).

At that time, Romans wiped with a *sea sponge* that was attached to a stick. After wiping they *cleaned* it off with a dip in a *basin* filled with vinegar and saltwater (Datta, 2023b).

Unfortunately, many Romans could *not* afford personal sponges. It was therefore a common practice to *share* them, which then became a breeding ground for *germs* and *disease* (*ibid*).

Most countries in Europe usually have a *bidet* in their washrooms. A bidet includes a spout that streams water like a water fountain to rinse and clean (*ibid*).

China was the *first* country to use toilet paper. By 1393 rice-based toilet paper was mass-produced for the Chinese imperial family. On the contrary, it took until 1857 for the Western world to come up with a mass-produced toilet paper (Datta, 2023b).

The *first* toilet paper in America was invented in 1857 by a New York entrepreneur, Joseph Gayetty. The next advance in toilet paper occurred in 1890, when two brothers, Clarence and Irvin Scott, popularized the concept of toilet paper on a roll. However, Americans remained *embarrassed* by bodily functions. Toilet paper was such a *taboo*, that no one wanted to ask for it by name. So, it was an *uphill* battle to get the Americans to buy toilet paper openly (Datta, 2023b).

In the nineteenth century, many Americans began using newspapers and pages from *catalogs*--for example, Sears & Roebuck catalog, and Farmers' Almanac--as a *substitute* for toilet paper (Datta, 2023b). However, later on, the companies printed their catalogs on *glossy* pages, which made wiping *uncomfortable* (*ibid*).

At the end of the 19th century, more and more houses were being built with sit-down *flush* toilets that were connected to indoor plumbing. What people really wanted then was a product that could be *flushed* away with minimal damage to the pipes. So, the toilet paper companies began to *advertise*, that the

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product was recommended by both *doctors* and *plumbers* (Datta, 2023b).

In 2019 America spent more than $6 Billion every year on toilet tissue—*more* than any other country in the world (ibid).

The toilet paper market in America has essentially *plateaued*. The real growth in this market is now occurring in *developing* countries (Datta, 2023b).

2. Charmin Toilet Paper (P&G)

In the early 1900s, toilet paper was still being marketed as a *medicinal* product. But in 1928, Hoberg Paper Co. of Green Bay, Wisconsin, introduced a brand called *Charmin*, and marketed it with a logo that depicted a beautiful woman. The *ingenuity* of this campaign was that by projecting *softness* and *femininity*, the company was able to *avoid* talking about the real function of toilet papers, that *no* one wanted to talk about (Datta, 2023b).

And this made Charmin a *successful* brand, and helped it to survive the Great Depression of 1929 (*ibid*).

In 1957 P&G acquired Hoberg Paper Co (*ibid*).

Charmin was the *market leader* with a brand market share of 24.1% in 2008 (*ibid*).

3. Cottonelle

Kimberly Clark introduced Cottonelle Toilet Paper In 1972. In 2008, Cottonelle was the *runner-up* with a brand market share of 14.1% (Datta, 2023b).

4. The Scott Paper Co.

The Scott Paper Co. was founded in 1879. It was acquired by the Kimberly-Clark Corp. in 1995 (*ibid*).

5. Georgia-Pacific

Georgia Pacific has two toilet paper brands: Quilted Northern and Angel Soft. In 2005 it was acquired by Koch Industries to become a privately-held, wholly-owned subsidiary (*ibid*).

6. Results of Hierarchical Cluster Analysis

For *both* 2008 and 2007, the results did *not* support Hypothesis I, because *both* Charmin, the *market leader*, and Cottonelle, the *runner-up*, were found to be members of the *premium* segment.

Yet, the data supported Hypothesis II for 2008 and 2007, since the unit price of Charmin was *higher* than that of Cottonelle (Datta, 2023b).

In 2008 Charmin, the *market leader*, had a market share of 24.1%, followed by Kimberly Clark's Cottonelle, the *runner-up*, with a 14.1% share.

The U.S. Toilet Paper market was quite competitive with *three* corporate *strategic group*--P&G, Kimberly Clark, and Georgia Pacific--and *six* major brands (*ibid*).

Part B. The U.S. Disposable Diapers Market

The U.S. Disposable Diapers market had retail sales of $2.4 Billion in 2008.

1. A Short History of the U.S. Disposable Diapers Industry

Disposable Diapers were developed simultaneously in Europe *and* North America between the 1930s and 1950s, with the most progress taking place *after* World War II. Technological advances, such as the development of more *soft* and *absorbent* materials drove the disposable market to new heights (Datta, 2023d).

2. P&G Introduces Pampers Disposable Diapers in 1961

Throughout the 1960s and the 1970s, Pampers built significant unit volume and dollar sales by converting *cloth*-diaper users to *disposable*-diaper users. Thus, P&G effectively created a *new* product category, and easily became the market *leader* (Lafley, 2013; Datta, 2023d).

The P&G story is a great example of strategic *insight* and *vision:* a *better* product that fulfilled an *unmet* consumer need; delivered a *better* user *experience*; and created *better* consumer *value* (*ibid*).

In the words of Peter Drucker, Pampers disposable baby diapers "*created* customers" and served them *better* than the competition (Lafley, 2013, *italics* added; Datta, 2023d).

3. P&G Introduces Luvs Brand Disposable Diapers in 1976 that were Better than Pampers

In 1976 P&G launched a *second* disposable diapers brand, *Luvs*, which featured an *hourglass*-shaped pad with elastic gathers. Luvs provided a superior *fit, absorbency,* and *comfort* for a 30% price *premium* compared to Pampers (Lafley, 2013; Datta, 2023d).

Luvs soon became an industry *standard* (Datta, 2023d).

4. Launching Luvs as a Second Diaper Brand Most Strategic Error in P&G History

In a blog, A.G. Lafley, formerly the Chairman and CEO of P&G, made an *amazing* statement. He said that introducing Luvs as a *second* diaper brand was the *most* strategic *mistake* in P&G history! (Lafley, 2013; Datta, 2023d).

He asks: Why did P&G decide to introduce a *new* higher quality brand—Luvs--rather than improving and extending the *existing mega* brand: Pampers (*ibid*)?

At that time, P&G's practice was a *multibrand* strategy: a new *brand* for every new product, a strategy that seemed to be working well in laundry detergents and other products (*ibid*).

Second, the new diaper design entailed *higher* operating costs, because it needed significant investment in manufacturing, that would then require a 20% hike in Pampers' retail price. So, P&G worried that the existing Pampers users would *reject* a premium line of Pampers (*ibid*).

However, consumers *liked* Luvs because of its clearly *better* quality, and offered good *value* that justified its *premium* price (*ibid*).

As mentioned above, soon Luvs became an industry *standard*.

But, as it turned out, introduction of Luvs did *little* to bring new customers to P&G; instead, it split the market share between Luvs and Pampers (Lafley, 2013; Datta, 2023d).

5. Huggies Disposable Diapers

In 1978 Kimbrly-Clark introduced Huggies, a new brand of disposable diapers. Huggies had a Luvs-like *hourglass* shape, a *better* fit, and an *improved* tape-fastening system. As a result, the market share of Huggies climbed to 30% (Lafley, 2013; Datta, 2023d).

Later, P&G learnt, based on a series *focus*-group research, that every single *mom* that used Huggies, Luvs, or Pampers preferred the *hourglass*-shaped diaper (Datta, 2023d).

So, in 1990s P&G *repositioned* Luvs as a brand with a price *lower* than that of Pampers (*ibid*).

In 2008, Luvs was competing in the *premium* segment with a brand market share of 6.4%. However, Pampers was the market *leader* with a 30.9% share, and a membership in the *super-premium* segment (Datta, 2023d).

The U.S. Disposable Diapers market is *dominated* by two corporate players: P&G with an overall market share of 37.3%, and Kimberly Clarke with an identical share of 37.4% (Datta, 2023d).

6. Results of Hierarchical Cluster Analysis

For both 2008 and 2007, the results did *not* support Hypothesis I. This is because *both* Pampers, the *market leader*—with a market share of 30.9%--and Huggies, the *runner-up*, with a market share of 27.1%, were found to be members of the *super-premium* segment.

However, the data supported Hypothesis II, because the unit price of the *market leader*, Pampers, was *higher* than that of the *runner-up*, Huggies.

Part C. The U.S. Deodorant Market

The U.S. Deodorant Market had retail sales of $1.3 Billion in 2008.

1. Deodorant vs. Antiperspirant

Antiperspirants are meant to reduce *sweating*. On the other hand, deodorants are intended to cover up the body *smell* (Datta, 2024e).

2. Major Players in the U.S. Deodorant Market

It is a highly competitive market, with *three* major corporate players: Procter & Gamble (P&G), Unilever, and Colgate-Palmolive.

The *market leader* was P&G's Secret, followed by Unilever's Dove, the *runner-up* (Datta, 2024e).

3. Secret

Procter & Gamble (P&G) developed Secret deodorant in the 1950s. This was the *first* antiperspirant *and* deodorant specifically designed for and marketed to *women* (*ibid*).

P&G created Secret to cater to the desire of women for a product that would contribute to their "feelings of femininity, daintiness and freshness" (*ibid*).

In 1972, P&G introduced the now-famous Secret *tag line* 'Strong enough for a man, but made for a woman.' "The tagline still remains one of the most *famous* advertising lines of all time" (Datta, 2024e).

4. Old Spice

Old Spice Deodorant is manufactured by P&G. It was launched in 1937 as "Early American Old Spice" by William Lightfoot Schultz's company: Shulton Inc. It was originally targeted to women. By the end of 1937 the company introduced the men's version (Datta, 2024e).

5. Dove

The Dove brand was started by Lever Brothers (now Unilever), a British soap and detergent company. Unilever *expanded* Dove's product line beyond the soap bar to include *deodorants*, body washes, and more in the 1990s and 2000s (Datta, 2024e).

6. Degree

The history of Degree deodorant is *linked* to Rexona, which was purchased by Lever Brothers in the 1930s.

In the 1960s Rexona was introduced worldwide, and later it became Degree in the United States (Datta, 2024e).

In 1996 Unilever acquired the Degree brand from Helene Curtis (*ibid*).

In 2021 Degree partnered with several organizations to create the world's *first* deodorant designed for people with *disabilities* (*ibid*).

7. Mennen

The Mennen Co. was founded in 1878 by a German immigrant, Gerhard Heinrich Mennen, in Newark, New Jersey. In 1992, the company was sold to Colgate-Palmolive (*ibid*).

8. Results of Hierarchical Cluster Analysis

For both 2008 and 2007, the data did *not* support Hypothesis I because Secret, the *market leader*—with a market share of 16.1%--and Dove, the *runner-up*, with a market share of 9.7%, were members of the *premium* segment (Datta, 2024e).

However, for 2008, the data *did* support Hypothesis II, because Dove, the *runner-up*, had a price that was *lower* than that of Secret, the *market leader* (*ibid*).

Although technically the results did not support Hypothesis II for 2007, nevertheless, the results did *no*t negate Hypothesis II either (*ibid*).

Part D. The U.S. Sanitary Pads Market

The U.S. Sanitary Pads market had retail sales of $881 million in 2008.

1. Anatomy of Menstruation

According to Stanford Medicine Children's Health, when a young woman reaches puberty, she starts to ovulate. This is when a mature egg or ovum is released from one of the ovaries. On average, a young woman in America has her first menstrual period at about age 12 (Datta, 2024a).

Menstruation is part of a woman's *cycle* when the lining of the uterus is shed. This happens throughout a woman's *reproductive* life. With each monthly cycle, the uterus prepares itself to nourish a fetus. Increased levels of estrogen and progesterone help thicken its walls (*ibid*).

The menstrual *cycle* lasts from the first day of the last period to the first day of the next period. The average menstrual cycle is about 25-30 days, but it can be as short as 21 days, or longer than 35. It is different from person to person (*ibid*).

2. A Brief History of Modern Menstrual Products

The material in this section is from the *insightful* work of Jennifer Kotler, Ph.D., Harvard University (2018).

For most of human history, *menstruation* has been associated with "<u>taboos and stigma</u>" (Kotler, 2018; <u>underline</u> in the original; Datta, 2024a).

Prior to 1985, the word "period" had *never* been spoken on American television. Nevertheless, in spite of these cultural norms, technological innovation continued to occur (*ibid*).

In Europe and America, *home-made* menstrual *cloths*, made out of flannel or woven fabric, were quite common through most of 1800-1900 (*ibid*).

By the turn of the century, worries about bacterial *infection* from inadequate cleaning of *reusable* sanitary pads between wears, created a new menstrual *hygiene* market. Between 1854 and 1915, *twenty* patents were granted for menstrual products. This included the first menstrual *cups*, that were generally made of aluminum or rubber (*ibid*).

In America, Johnson & Johnson introduced the first disposable menstrual pad Lister Towels in 1896 (Datta, 2024a).

In spite of these innovations, moral taboos *persisted* about menstruation, and women were still *hesitan*t to be seen buying them. One example is the commercial *failure* of Lister Towels (Kotler, 2018; Datta, 2024a).

3. Kotex Launches the First Commercially Successful Sanitary Pad in 1921

During the First World War, nurses in France noticed that cellulose—made out of *wood pulp*—was much more effective in absorbing *blood* compared to cloth bandages (Kotler; Datta, 2024a).

This inspired the first *Kotex* sanitary napkin (pad), made from surplus high-absorption war bandages that were manufactured from wood pulp fiber. In 1921 Kimberly Clark launched Kotex in America, that became the *first* successfully mass-marketed sanitary napkin (Kotler; Datta, 2024a).

In 2008 Kotex had a market share of 16% in the Disposable Sanitary Pads market (Datta, 2024a).

4. Tampax Secures a Patent for the First Disposable Tampon in 1933

In 1933 Tampax Corp., now owned by P&G, patented Tampax disposable tampons (Kotler; Datta, 2024a). Due to *hygienic* concerns about the proximity of sanitary pads to fecal bacteria, the medical community considered tampons a *healthier* alternative. However, many communities were *reluctant* to embrace tampons: because of *moral* concerns about virginity, masturbation, and its potential to rupture the hymen (*ibid*).

5. Continued Innovation in Sanitary Pads

Because of the public's moral concerns about tampons, innovations continued to accelerate in sanitary pads.

Mary Beatrice Davidson Kenner, an African American woman, was able to get her first patent in 1956. This patent was for the sanitary belt *adhesive* to keep the pad in place (Kotler; Datta, 2024a).

Although Kenner had invented the sanitary *belt* itself years before, she could *not* afford to file for a patent. The main reason for this was *racism* that she experienced in her quest to get a patent (*ibid*).

6. Stayfree Sanitary Pads

The Stayfree brand, then owned by Johson & Johnson, introduced the first beltless sanitary pad in 1974 (Datta, 2024a).

In 2013 Energizer Holdings, Inc. bought the Stayfree brand in North America from Johnson & Johnson (*ibid*).

In 2008, Stayfree had a market share of 15.3% in the Disposable Sanitary Pads market (*ibid*).

7. Always Sanitary Pads: A Mega-Brand

Always is a *mega*-brand that is widely known by women around the *world*. It belongs to the largest multinational corporation, P&G.

Always sanitary pads were *first* introduced in the market in 1983. In 1985 it became a sales *leader* in the sanitary pads market (Datta, 2024a).

In 2008, Always had a market share of 56.1% in the Disposable Sanitary Pads market (*ibid*).

In 2015 Always Infinity was named *Product of the year* in the feminine care category. Although most pads were made of cotton fluff, "Always Infinity is uniquely designed with *FlexFoam* material that revolutionized comfort and protection. Always Infinity absorbs 10 times its weight while forming a woman's body for amazing comfort" (*ibid*).

8. Sanitary Pads vs. Pantyliners

Panty liners are much *thinner* than pads, and are designed to absorb *daily* vaginal discharge, *light* menstrual flow, "spotting," and slight urinary incontinence (Datta, 2024a).

On the other hand, Pads are designed to absorb a much *greater* amount of liquid, and keep it away from a woman's skin—which is why they're so effective at preventing leaks and making women feel more comfortable (*ibid*).

Since panty liners aren't fashioned to absorb heavy flow, so, ideally, they should be worn *before* or at the *end* of a woman's menstrual cycle, when a woman experiences *vaginal discharge* or *light* bleeding (*ibid*).

9. Breakdown of Menstrual Hygiene Products

Disposable menstrual *pads* (89.0%) constitute by far the *largest* segment in the menstrual hygiene market, followed by *cloth* menstrual pads (4.5%), and tampons (4.2%). And only 1.6% use a menstrual cup (Datta, 2024a).

10. Complexity of Sanitary Pads Market Leads to a Tremendous Variety

Initially, disposable sanitary pads were too expensive for most women, and it took several years before they became popular (Datta, 2024a).

The earliest disposable pads generally looked like a *rectangle* made out of a cotton wool or similar fibrous material covered with an absorbent liner. This design was notorious for *slippage*--either forward or back of the intended position (*ibid*).

A later innovation was the placement of an *adhesive strip* on the bottom of the pad for attachment to the saddle of the panties. And this became the favorite design for women (*ibid*).

Over the last twenty years, the sanitary pads industry has made tremendous strides. "Gone are the days of bulky belts with diaper-like thickness" (*ibid*).

Sanitary pads are quite *complex*, and that has led to a remarkable *variety* in the sanitary pads market:

- Overnight Sanitary Pad**s**
- Ultra-Thin Sanitary Pads
- Sanitary Pads with Wings
- Long Sanitary Pads
- Unscented vs. Scented Pads

11. Results of Hierarchical Cluster Analysis

For both 2008 and 2007, the results did *not* support Hypothesis I, because the *market leader*, "Always Ultra-Thin Maxi Pad with Wings" and "Always MX PD/WG Ultra-Thin Ovrnt," *runner-up*, were both members of the *premium* segment. The overall market share of the muti-brand Always was 56.1% (Datta, 2024a).

Although technically the results did not support Hypothesis II, nevertheless, the results did *no*t negate Hypothesis II either (*ibid*).

Part E. An Overview of the Personal Hygiene Group

1. The U.S. Toilet Paper Market

Here we need to address two questions. One, how P&G's Charmin became the market leader in 2008 with a brand market share of 24.1%. Second, in a highly competitive market, how it is that both Charmin, the *market leader*, and Cottonelle, the *runner-up*, were found to be members of the *premium* segment.

In America the history of toilet paper was such a *taboo*, that no one wanted to ask for it by name. So, it was an *uphill* battle to get the Americans to buy the toilet paper openly.

It was Hoberg Paper Co. which introduced Charmin in 1928. Hoberg marketed Charmin with a logo that depicted a *beautiful* woman. The *ingenuity* of this campaign was that by projecting *softness* and *femininity*, the company was able to *avoid* talking about the *real* function of toilet paper, that no one wanted to talk about. And this made Charmin a *successful* brand, and helped it to survive the Great Depression of 1929.

In 1957 P&G acquired Hoberg Paper Co.

So, based on the above discussion, it is clear that the *secret* of Charmin's success was that Hoberg Paper Co. was able to *persuade* Americans to buy Charmin by *avoiding* to talk about the real function of toilet papers, that no one wanted to talk about because of a social *taboo*.

This phenomenon is similar to what happened earlier in the U.S. Canned Soup market. At the turn of the century, America was *not* a soup-eating country, but a meat and vegetables nation. So, the Campbell Co. was successful in *inducing* Americans to eat *more* soup.

The second question is that toilet activity is quite *complex*, in which personal *hygiene* plays a critical role. Although a *bidet* is quite popular in Europe, very few people in America use it.

So, in the absence of a substitute, Americans are willing to pay *premium* prices for toilet paper, because it serves an *important* need: an *antidote* to germs and disease.

2. The U.S. Disposable Diapers Market

The most important question that we need to address is that both the *market leader*, Pampers, and the *runner-up*, Huggies were found to be members of the *super-premium* segment: a rather *rare* event.

We can cite *three* reasons for this.

First, in the words of Peter Drucker, *Pampers* disposable baby diapers "*created* customers" and served them *better* than the competition.

Second is the rising cost of *pulp*--a raw material used to make disposable diapers--and higher transportation and freight costs.

Third, disposable diapers serve an *important* need--personal *hygiene*—an *antidote* to germs and disease.

3. The U.S. Deodorant Market

Unlike other deodorant brands, *Secret* was designed and marketed to *women* who desired a product that would contribute to their "feelings of femininity, daintiness and freshness:" for which they were willing to pay a *premium* price.

4. The U.S. Sanitary Pads Market

For most of the human history, *menstruation* has been associated with *taboos* and *stigma*. More importantly, menstruation is an activity that is so complex that it is synonymous with *femininity* itself. So, it is not surprising that many women are willing to pay *premium* prices for such a fundamental need.

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Note

Note 1. Profit Impact of Market Strategies.