

# Local players giving a run for the share to a global giant: A case study of Pampers brand of Proctor and Gamble Pakistan

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## Abstract

*Pakistan is a densely populated country with a population of around 200 million people with an annual birth rate of 29.8 births/1000 people that approximates to around 13 million babies per year with a majority of births in tier three and four socio-economic classes (Geoba, 2017). Based on marvelous demand and consumption patterns, the market for diapers seemed ever-increasing. This instrumental single case-based study addressed the concerns regarding the competitiveness of Pampers with other diaper brands. It undertook eight interviews with industry experts till saturation point and availed thematic analysis techniques to categorize themes pertinent to core issues. Pampers is an expensive brand, primarily due to its higher cost of importing and local value additions. Despite being a global giant in the diaper industry and having the first-mover advantage in Pakistan, the company is continuously losing its value and volume share against much cheaper local players since 2013. The case addressed shortcomings of Pampers Pakistan that were needed to be addressed and strategic branding and marketing decisions that were likely to regain its market share. Their marketing strategists realized revisiting its procurement plans, pricing strategies and distribution strategies, and brand management on an urgent basis to maintain its sustainable competitive advantage.*

**Keywords:** *Procurement, Pricing and distribution strategies, Branding and marketing strategies, Pampers in Pakistan, Proctor and Gamble (P&G)*

**JEL Classification:** *L00, L20*

## DISCUSSION QUESTIONS

- 1 What were the internal and external challenges that Pampers Pakistan (of P&G) faced? You can develop I/EFAS matrix or PESTLE or SWOT models for it.

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- 2 Comment on the market size, value, and volume share of Pampers Pakistan. What are the factors responsible for the continually declining market share (value and volume share) of Pampers Pakistan?
- 3 Identify and evaluate the key strategic marketing decisions that did not go in favor of Pampers Pakistan in the diaper industry?
- 4 How Pampers Pakistan can attain its growth objectives? To combat barriers related to growth, develop Ansoff's growth matrix model for Pampers.
- 5 What would you suggest Pampers Pakistan in relation to its strategic marketing plan or marketing-mix strategies comprising product (including segmentation, targeting and positioning, packaging, and branding), pricing, distribution, and promotional mix strategy to other elements of marketing strategy?

On a shiny morning of first Monday of July 2019, the country manager of Proctor and Gamble, Mr. Syed Qaisar Shareef, was having a cup of tea and reviewing the annual performance of Pampers in Pakistan. The lines/wrinkles appearing on his face reflected his worries about rapidly declining market share in terms of value and volume to loss of revenues since the year 2013. Despite being the most innovative brand with strong financial cum strategic support of a global leader, P&G, Pampers, the pioneer brand kept fluctuating downwards. None of its branding strategies and marketing programs worked well. Shareef had several meetings with its team leaders but no one could seriously help in combating crises. The few problems that the team diagnosed in the wake of market research were costly procurement of its imported brands due to rapidly rising inflation, import duties, taxes, etc., high prices, and rising competitive rivalry inclusive of new entrants. While some team members and industry experts questioned about the effectiveness of its promotional campaigns with low budgets and its distribution channels' inability to ensure its brands' availability in semi-urban, large villages, and rural territories, poor trade marketing to sales force strategy, and non-cohesive organizational culture, which resulted in its collapse and utter failure of its branding and marketing strategies.

## **THE DIAPERS INDUSTRY**

Due to the massive population of 220 million people, a swift growth rate of 2.40% with an enormous fertility rate, and approximately 30 million children in the age bracket of 1-5 years, the diaper industry in Pakistan is flourishing over time. Due to awareness in masses, urbanization, working women taking care of their babies in a special way, the demand and consumption patterns kept rising. Child specialists to physicians and medical practitioners also encouraged families to use diapers or nappies for the sake of cleanliness and healthiness of their babies. Moms also observed the smooth sleep of their babies in nappies, which appeared extremely vital for their healthy growth. Most of the demand was fulfilled through imported brands but a few companies had established manufacturing plants too to save import cost and avoid procurement hassles. The industry observed stiff competition but P&G was the market leader with Pampers brand. Canbebe, Huggies, and Hapi Napi were other renowned brands, while a couple of other imported brands including some economical Chinese brands, offering low prices and trade marketing deals to merchants, also compete for their share (Allied Market Research, 2020; Hussain & Qureshi, 2018).

Globally, the diaper industry was estimated to record US\$ 69 billion sales in 2019 (Imarc, 2020), which was thriving mainly in North America in terms of value, but it observed the

highest compounded annual growth rate in several countries of South Asia (Poctor & Gamble, 2019). The industry experts believed that densely populated countries like Pakistan, Bangladesh, and India, diapers observed almost 20% growth per annum. A global report by Nielsen (2015) conducted in sixty countries about the diapers' market unveiled interesting consumer insights that competition worldwide is getting stiff. Moms were looking for comparative prices of various brands inclusive of store brands. Consumers appeared to be price-sensitive and they were looking for buying diapers from physical stores to online channels.

In Pakistan, the industry had three segments based on the income groups of socio-economic strata including premium, medium bulk, and open or lose diapers. Based on the user profile, the industry was divided into three categories that included regular users (who used two to three diapers a day on an average), night users (with maximum usage of one to two units per night), and occasional users (who usually used diapers on special occasions or events). One common trend in the industry was that the key rivals spent on mass awareness creating television ads during the time of launching their brands, but then gradually cut such budgets and preferred campaign-specific spending (Hussain & Qureshi, 2018).

### *Ontex – Canbebe*

Ontex started its business in 2011 as a local company by importing diapers and selling it under the name "Canbebe". Within a year of its inception, Ontex established state of the art diaper manufacturing plant at Port Qasim industrial area Karachi. Canbebe was produced locally today with international quality standards. The other brands of Ontex comprised: Canped, Helen Harper, and Canbebe wipes. Canbebe had an active nationwide distribution network with an aim to lead the diaper industry in Pakistan. Ontex heavily relied upon its ethical principles, based on quality, safety, and customer satisfaction. Ontex aimed to be an export-oriented company with leading brands in Pakistan (Ontex, 2017).

### *Hyeworth Renault Petersen – Huggies*

Hyeworth Renault was a renowned importer and distributor of an array of consumer products in Pakistan and Afghanistan. It had in-depth knowledge and experience of a wide range of products and categories. It had a nationwide presence with its 14 regional offices and an extensive distribution network in 102 towns. With Hyeworth extensive reach, Huggies was distributed to 30,000 retail outlets throughout Pakistan. Huggies was a disposable diaper brand by Kimberly-Clark USA. Huggies had a wide number of stock-keeping units in different sizes along with pull-ups training pants for toddlers (Hyeworth-renault, 2017).

### *Z & J – Baby Master*

Baby Master was the product of Z & J hygienic products, established in the year 2000 with its production facility in Kamoke Pakistan. The company aimed towards providing high-value products at reasonable prices. Hapi Napi was a brand targeted towards the bottom of the pyramid (BoP) market consisting of middle and lower socio-economic classes. Z & J was the only diaper manufacturer that produced diapers in five different sizes and claims to be the largest diaper seller in the industry. Z & J had laid down a lot of efforts in awareness-raising campaigns to increase the compound growth rate of the industry to 20% per annum. Such increment in the primary demand ultimately benefited it too (Z & J, 2017).

## ***Procter and Gamble (P&G) – Pampers***

P&G enjoyed a presence in over 180 countries worldwide. The roots of the company dated back to 1837 with its headquarters in Cincinnati, Ohio, USA. It was founded by William Procter and James Gamble. Worldwide it had five billion consumers with sales revenues of more than US\$67 billion. It adopted various global standards of excellence and issues of social commitment and citizenship reports, whereas it took immense care of environmental sustainability in its products and practices. It invested in corporate social responsibility (CSR) programs to engage communities and their consumers. It earned countless awards globally including the world's most innovative company award by Forbes and the world's most reputable and admired company awards respectively by Forbes and Fortune (Procter and Gamble, 2017; 2019; 2020).

The 2019 annual report of P&G illustrated that out of its net sales of US\$ 67,684 million (just 1% up from its preceding year), the global share of baby, feminine, and family care category stood US\$ 17,806 million (just 2% down from its preceding year), with a gross margin of 48.6%, and selling, general, and administrative expenses 28.2%. This category contributed 27% sales with 23% earning in its total product portfolio. India, the Middle East, and Africa region recorded 7% share in its total net sales revenue. Luvs and Pampers were its flagship brands in the diaper sub-category (Procter & Gamble, 2019). The Exhibits 1-5 in the annex illustrate further comparative data of its sales and financial performance for 2018-19.

Among its offerings, P&G sold an array of brands catering to multiple segments of consumer goods from beauty products to household and baby care products. It had a product portfolio of more than 180 brands. It directly sold its products through grocery stores, mass merchandisers, high-frequency stores, and membership club stores. The company utilized every possible above the line (ATL) medium for its promotions and advertising and is the biggest spender in the world concerning its advertising campaigns. In 2017 alone, P&G spent 7.12 billion U.S dollars in its global advertisements campaigns (Procter and Gamble, 2017).

## **PAMPERS IN PAKISTAN**

Pampers was one of the market leaders in the global diaper industry (Imarc, 2017) for more than 40 years and is committed to the health and wellness of babies around the world by providing enormous developmental resources and information to parents for the care of their healthy and happy babies. In August 2000, Procter & Gamble launched Pampers in Pakistan. This allowed Pakistani consumers to benefit from this globally renowned brand that was approved by global standards of the Human Safety Reassurance Program and also endorsed by the International Society of Pediatricians (Procter and Gamble, 2017; 2020).

The special feature of Pampers was the diaper's core design that included a new gel plus green layer, which absorbed liquid quickly and helped to improve the baby's skin through relatively better dryness performance. Pampers core took urine from the diaper surface after loading. Its innovative features minimized baby's contact time with urine. A homogeneous blend of cellulose and a very absorbent material resulted inefficient distribution of the load. The innovative storage technology locked the urine away so that it cannot return to the baby's skin (Hussain & Qureshi, 2018).

Like its most rivals, Pampers also had the most common segments of its brand based on consumers' preference, usage, and frequency behavior, which comprise three segments based on the income groups of socio-economic strata including premium, medium bulk, and open or lose diapers. It mainly targeted socio-economic classes A and B or upper and middle classes, since they had relatively high affordability. They had greater brand awareness and quality consciousness. However, they had consumers from C class too. Pampers positioned itself as a highly innovative, comfortable, and high-quality global brand. Pampers use high-quality raw materials and packaging. Due to its differentiated features, the global research and development (R&D) experts of Pampers called it constructive disruption (Proctor & Gamble, 2019). Its prices appeared high because its cost seems ever-increasing due to costly procurement, imports, taxes and duties, shipping and logistic costs, etc. Few domestic rivals possessed the manufacturing plants that provide them cost competitiveness.

***Pampers Stock Keeping Units (SKUs) in Pakistan***

Pampers in Pakistan offered different sizes and ranges as seen in Table 1.

*Table 1: SKU of Pampers Pakistan*

<b>Pampers Range</b>	<b>Size</b>	<b>Weight Range</b>	<b>No. of Diapers/Pack*</b>
<i>New Baby</i>	<i>1 (newborn)</i>	<i>2-5 kg</i>	<i>22</i>
<i>New Baby</i>	<i>2 (small)</i>	<i>3-6 kg</i>	<i>66</i>
<i>Active baby</i>	<i>3 (medium)</i>	<i>4-9 kg</i>	<i>48</i>
<i>Active Baby</i>	<i>4 (large)</i>	<i>7-18 kg</i>	<i>44</i>
<i>Active Baby</i>	<i>4+ (extra-large)</i>	<i>9-20 kg</i>	<i>42</i>
<i>Active Baby</i>	<i>5 (juniors)</i>	<i>11-25 kg</i>	<i>38</i>

*Source: Proctor and Gamble (2017)*

Pampers' range of SKUs varied concerning the weight of the baby. The SKUs ranged from 2 kg to 25 kg offering six different sizes of Pampers. P&G Pampers currently had 'Pampers with ultra-protection', which was an innovative brand with moist lock technology. According to P&G, it was unmatched and unrivaled in Pakistan, which provided it a unique and sustainable competitive edge. It believed that in the future, it would keep on innovating its diaper technology to benefit mothers and parents so that their babies grow up healthy and strong. It aspired to excel in baby health care products, aimed to provide joyful and playful happy life to the babies.

***Regional Presence of Pampers in Pakistan***

Pampers was readily available in urban Sindh and Punjab regions. Pampers Pakistan did not focus much on urban Balouchistan and Khyber-Pakhtunkhwa region due to their lesser inclination towards branded diapers. Also, Pampers were not distributed to rural areas of the country as the target market was primarily the socio-economic class A and B in urban regions only. However, to cater to lower urban markets, Pampers launched single hanger packets targeting the markets where diapers were sold on a single unit basis or in open or lose forms (Proctor and Gamble, 2017).

P&G Pakistan faced an overall decline in its volume share across the different categories of products and brands it sold in Pakistan. Similarly, Pampers market volume share had been declined considerably with an annual negative growth of 6%. The comparison between volume

share 2010 till September 2017 (in Table 2) marked an alarming decline in the market share. Pampers had divided Pakistan into various regions for effective distribution. It enjoyed a market share of 45% in Gujranwala and more in various territories to 89% (in Peshawar and Khyber-Pakhtunkhwa/KPK) regions in 2010, which substantially fell to nearly 23% to 28+% in various regions. Hyderabad was the only territory where it observed negligible increment i.e. 25% in 2010 to 25.8% in 2017 (Proctor and Gamble, 2017).

Table 2: Volume Share of P&G (in percentage)

Region	Volume Share 2010	Volume Share 2017
Karachi	46	23.7
Lahore	65	27.8
Islamabad/Rawalpindi	65	23.9
Faisalabad	80	26.6
Gujranwala	45	28.3
Hyderabad	25	25.8
Peshawar/KPK	89	25.9
Urban rest of Punjab	60	23.7
Urban rest of Sindh	59	27.8

Source: Proctor and Gamble (2017)

**Distribution Structure of Pampers Pakistan**

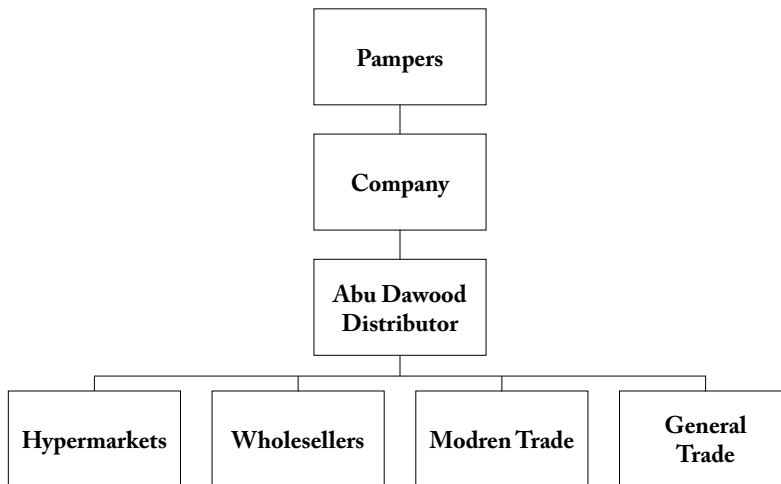


Figure1: Distribution Structure

Source: Proctor and Gamble (2017)

As displayed in Figure 1, P&G Pakistan followed a simplified distribution network with a single distributor being the sole responsible for the delivery and visibility of all the product categories imported or manufactured in Pakistan. Pampers were imported from Cairo, Gebze, and Saudi regions through Agility Logistics, which were directly delivered to the warehouses of the Abudawood trading company. Pampers imported for tier B and C of the socio-economic class were repacked at Abudawood, which were then delivered to the four market channels i.e. hypermarkets, wholesalers, modern trade stores, and general trade stores. Pampers also had its online channel for selling its brands. Daraz.pk and some other renowned online channels also

sold its brands. It adopted digital or online marketing tools along with social media marketing tools for effective consumer engagement, customer services, and relations, and for developing brand communities.

The physical distribution leader of P&G looking after Pampers sales at Abudawood, Faizaan Munim stated that "We took immense care of our procurement and supplies to market, kept effective inventory control and supply chain analytics, and ensured that our stockists' shelves never get empty for our brands." But he agreed on the need for improvement in penetration in semi-urban and rural areas of the country, availability in daycare centers, customer relations management, and attractive discounts cum promotional schemes for trade marketing separately for local modern trade channels.

### *Market Forces and Consumption Patterns*

In Pakistan, due to its ever-changing economic conditions and ever-escalating inflation trends, the growth rate of the diaper industry remained subtly below 20%. Despite the increasing trends of awareness, diaper was considered as a luxury product used during special events or occasions. The primary needs (food, clothing, and shelter) still occupied the major portion of monthly expenses from the disposable income of consumers, making diapers as a secondary choice in the share of pocket for the majority of the population falling under category B and C of socio-economic class. Few studies uncovered that ordinary people in Pakistan spent about 40 to 45% of their income on staple food (Qureshi, Qureshi, & Qureshi, 2018; Qureshi, Farooqui, & Qureshi, 2016), which made it impossible for them to afford nappies.

Pampers were imported from different regions in US dollar denominations. Continuous and frequent devaluation in Pakistani rupees caused due to political instability made the import costly and unfeasible for P&G to maintain its competitive pricing edge. Policies regarding paper products used in packaging and import policies also had a direct effect on the Pampers. Also due to political uncertainty, imports were affected during strikes and forced shutdowns, which caused financial losses to the company.

Pampers, at tier A of the socio-economic class, enjoyed unmatched power as customers fell extremely loyal and had considerable disposable income. However, customers in tier B and C appeared to be relatively less brand loyal, since due to non-stop inflation, their income rapidly declined and their purchasing power to personal debts kept rising. They appeared more price sensitive than preferring high quality and standards.

P&G traditionally believed that about Pampers, they had higher bargaining power against retailers and wholesalers. However, these dynamics changed with the introduction of its competing brands. Also, the policy of having one mega sole distributor that was followed globally was not working well for Pampers, as even the product availability to the sub-urban region was comparatively low.

Currently, P&G was the only company using innovative formulae for soaking. The Pampers was composed of an average of 3.97 grams of sodium polyacrylate, linked on a thin thread, and an average of 0.71 gram of cotton which permitted Pampers to soak more liquid than any other diaper (Shramko, 2013). However, this technological advantage could easily be imitated and competitors could easily come up with low price diapers having the same or better attributes,

which could cause harm to the brand. This was the reason that along with global players' brands, several other brands including economical Chinese brands grabbed market share (Hussain & Qureshi, 2018).

### *Competitive Position Analysis*

Pampers Pakistan conducted a study to assess its competitiveness through its strengths and weaknesses, which enable it to tap opportunities and avoid threats (Proctor & Gamble, 2017). Its core strengths comprised strong brand equity, attractive social image, the largest distribution network, innovative products, and eco-friendly cum easy to recycle. Its weaknesses comprised a lack of promotions and a high cost of procurement. Its opportunities comprised introducing new products like potty trainers, under James pajama pants, pampers for adults, making products available in daycare centers to educate new mothers, targeting family physicians and child specialists. Its threats comprised depleting market share due to expensive imports and poor segmentation.

Pampers was becoming synonymous with diapers and nappies. This association had become very strong. To tackle this problem, Pampers devised a new marketing campaign with the slogan: "**Har diaper pampers nahi hota**".

## **PROMOTIONAL PROGRAMS FOR BRAND BUILDING**

### *Promotion Mix*

P&G utilized promotional tools extensively to promote its brand 'Pampers'. Advertising pertained to educational themes where the parents and users are educated about the benefits and usage of the product. Ads were purposively educational in which a mother-child relationship was depicted where mothers were informed about baby care and health benefits of using the brand by elucidating and highlighting the innovative and skin-friendly technology used in Pampers and how it was better for toddlers. Exhibit 6 and 7 in the annex display the emotionally appealing print ad and eye-catching cum aesthetically designed packaging of Pampers.

### *Above the Line Media*

The primary focus of Pampers remained the mass communication via TV, radio, print ads along with out of home (OOH) media running reminders and teasers to maintain the brand recall value for existing customers and to create top of the mind recall for new users and brand switchers. Pampers Pakistan spent extensively on TV commercials (TVCs) mainly displaying awareness themes with a central message revolving around baby's sound sleep at night by keeping the baby dry. Similarly out of home (OOH) advertisement was also used as a part of the promotional mix strategy. OOH channels comprised billboards and hoardings placed in the metro cities of Pakistan.

### *Below the Line Media*

P&G's second largest allocation of budget for marketing was of non-traditional marketing channels among which merchandising and ground activities led to the integrated marketing communication (IMC) plan. Merchandising was the prime responsibility of the sales and



business development department whose responsibility was to ensure visibility of the brand throughout the store and to ensure that customers encounter the product in every possible situation. Among non-traditional marketing channels, Pampers had mobile clinics along with a toll-free number where pediatrics and consultants resolved child health-related issues over a call of in the mobile clinic vans (Proctor and Gamble, 2017). For shopkeepers, many sales promotions were offered on a seasonal basis i.e. usually in the winter season. Specially designed gift packs containing Pampers regular (active baby) at discounted rates were provided to the wholesalers, retailers, and general traders.

For effective public relations, Pampers Pakistan collaborated with Pakistan Paediatric Association as child welfare initiatives in educating mothers. Pampers through its mobile clinic vans also maintained a healthy relationship with all of its major stakeholders and prospective customers creating positive brand imagery in the minds of users and non-users both. In continuation of its social commitment and responsibility, P&G Pakistan along with United Nations (UN) Women Pakistan hosted an event to address gender bias in a bid to bring positive change and tolerance in society (Proctor & Gamble, 2020).

Pampers entered into a partnership with the United Nations Children Fund (UNICEF) for controlling immunization diseases concerned with maternal and neonatal tetanus in newborn babies and mothers, which killed millions of children in the low-income countries and especially in Sub-Saharan Africa (United Nations Children Fund, 2020; Proctor & Gamble, 2020). World Health Organization also lavishly appreciated such collaborative work (World Health Organization, 2007).

## **WAY FORWARD**

Pampers despite being the first mover and a renowned name in the diaper industry had not been able to pull the profits or increase the bottom line for sustainable growth. There could be many reasons behind such low and ever depleting marketing share in terms of volume and value. But it was high time that P&G Pakistan revises its branding and marketing strategies to make profits and regain its prior position in the market. To find a sustainable solution, P&G Pakistan needed to look at the industry dynamics from the consumers' perspective that is outside-in view rather being myopic and centralizing their global campaigns, which proved successful in different countries. The country manager, Mr. Syed Qaisar Shareef, and the key leadership was searching for the answers to various questions. How to reduce procurement costs for gaining cost competitiveness? Was having a local manufacturing plant that uses indigenous raw materials and ingredients a solution? How to excel in competitive warfare? Do promotional campaigns needed to be revisited with an augmented budget? How to ensure its brands' availability in semi-urban, large villages, and rural territories to daycare centers? How to redesign trade marketing and sales force strategies? Was its organizational culture cooperative and collaborative for cross-functional performance? Some managers pondered hiring a market research firm for deeper consumer insights, market intelligence especially for rivals' data and programs, and marketing analytics for measuring current trends to predicting the future trends of the market.

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## ANNEX

### *Exhibit 1. Summary of 2019 Results*

<b>Amount in Millions, except per share amounts</b>	<b>2019</b>	<b>2018</b>	<b>Change vs Prior Year</b>
Net Sales	\$ 67,684	66,832	1%
Operating income	5,487	13,363	(59%)
Net earnings	3,966	9,861	(60%)
Net earnings attributable to Procter & Gamble	3,897	9,750	(60%)
Diluted net earnings per common share	1.43	3.67	(61%)
Core earnings per share	4.52	4.22	7%
Cash flow from operating activities	15,242	14,867	3%

### *Exhibit 2. Operating Costs*

<b>Comparison as a percentage of net of net sales ; Years ended June 30</b>	<b>2019</b>	<b>2018</b>	<b>Basis Point Change</b>
Gross margin	48.6%	48.5%	10
Selling, general and administrative expenses	28.2%	28.5%	(30)
Operating margin	8.1%	20.0%	(1,190)
Earnings from continuing operations before income taxes	9.0%	19.9%	(1,090)
Net earnings	5.9%	14.8%	(890)
Net earnings attributable to Procter & Gamble	5.8%	14.6%	(880)

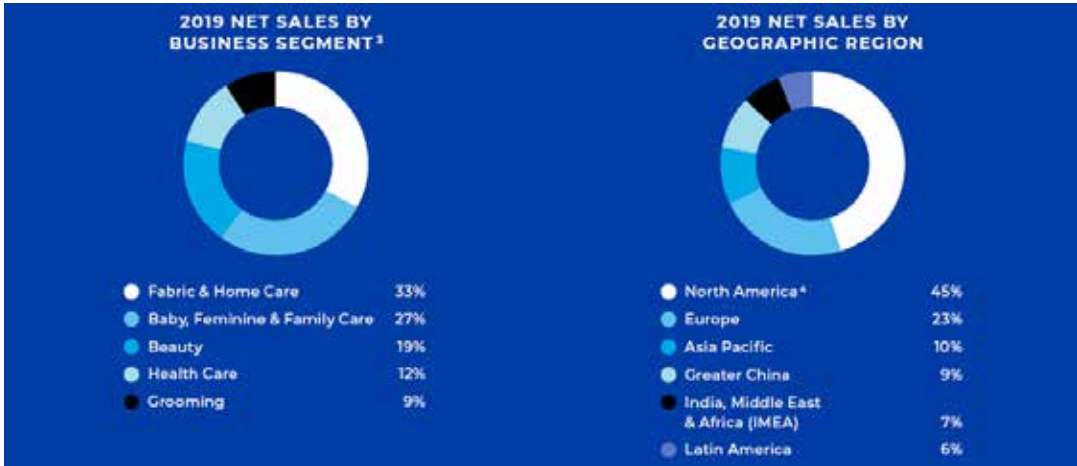
Source: Procter & Gamble (2019)

Exhibit 3. Sales of Baby, Feminine, and Family Care Category

(\$millions)	2019	2018	Change vs. 2018
Volume	N/A	N/A	1%
Net sales	\$17,806	\$18,080	(2)%
Net earning	\$2,734	\$2,251	21%
% of net sales	15.4%	12.5%	290bps

Source: Procter & Gamble (2019)

Exhibit 4. Net Sales by Business and Geographic Region



Source: Procter & Gamble (2019)

Exhibit 5. Net Sales and Earnings by Product Categories

Segments	% of Net Sales	& Earnings	Product Categories	Major Brands
Baby, Feminine & Family Care	27%	23%	Baby Care ( <i>Baby Wipes, Taped Diapres and Pants</i> )	Luvs, Pampers
			Feminine Care ( <i>Adult Incontinence, Feminine Care</i> )	Always, Always Discreet, Tampax
			Family Care ( <i>Paper Towles, Tissues, Toilet Paper</i> )	Bounty, Charmin, Puffs

Exhibit 6. Print Ad of Pampers



**Caring For Your Baby's World**

Source: Proctor & Gamble (2020)

Exhibit 7. Packaging of Pampers



Source: Proctor & Gamble (2020)