CASE STUDY | Redesigning Promotional Strategy After Disruption

HUGGIES

SITUATION

Huggies was looking to optimize promotions as a new lower-priced challenger entered the market and gained share.
The objective was to understand what levers of promotion can be adjusted to continue competing with the new disruption.

APPROACH

Analyze historical promotional impacts on the market and how the dynamics have shifted since the disruption.

- Build a custom framework using syndicated sales data to compare average weekly promotional share uplift by brand, pack, and retailer.
- Link competitor overlap, channel switching, discount depth, and post-promo demand to redesign the promotional strategy.

RESULTS

A revised sequencing and promotional frequency plan.

- Identified a new promotional hero pack as the disruptive entrant changed the pack size landscape.
- Created a revised weekly promotional calendar to reduce portfolio overlap, coordinate retailers and protect demand recovery; now informing client planning.

PROMOTIONAL UPLIFT BY PACK

Weekly share uplift during promotion (Huggies) | selected packs

PRE COMPETITOR DISRUPTION | FY '23-'25

Large Pack	**+28%**
Small Pack	+22%

POST COMPETITOR DISRUPTION | 2026 YTD

Large Pack	+13%
Small Pack	**+32%**

Introduction of the new lower priced pack by the market disruptor changed which pack Huggies relied on for uplift during promotions.

MARKET LEVEL EFFECTS

Volume change around large-pack events

	PROMO WEEK	WEEK AFTER	2 WEEKS AFTER
Channel Vol. Chg.	+35%	−21%	−1%

Certain promotions pull volume forward, creating a recovery window…

Channel Share of volume during major promotions

Chan 1 promo wk	Chan 1: 59%	Chan 2: 41%
Chan 2 promo wk	Chan 1: 46%	Chan 2: 54%

…while market volume shifts between channels as a result of major promotions.

COORDINATED PROMOTIONAL SEQUENCE

Illustrative retailer-specific calendar based on market response and demand recovery

WEEK 1	WEEK 2	WEEK 3	WEEK 4	WEEK 5
Retailer 1 Small Pack	**Retailer 1** Large Pack	**Retailer 2** Small Pack	**Retailer 2** Large Pack	**Recovery** Alternate Brand

Planning output • proposed sequence, not yet validated by in-market results

