

Household Paper Products - Brazil - October 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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“Brazil has a significant competitive advantage in the paper products category - it produces its own paper pulp in greater quantities and more quickly than other countries and the economic crisis in Europe and environmental pressures on Chinese paper factories makes production of paper pulp increasingly concentrated in Brazil, generating greater opportunities for the domestic market to grow.”

– Naira Sato, Senior Analyst

This report looks at the following areas:

- How can the facial tissues sub-category be less reliant on seasonality and have higher penetration?
- How can added scents and other benefits attract middle-class consumers?
- Is it possible to encourage senior consumers to “trade up,” even if they are likely to want to save money?
- Are there opportunities for the paper towel sub-category to expand usage in the kitchen, and enter the household cleaning segment?

Increasing external demands brings higher investment in local factories, which ends up benefiting the paper industry; the greater the supply, the greater is the industry competitiveness.

With more investment the industry manages to produce more and develop new technologies to meet consumers' demands. It is an opportunity for under-developed sub-categories, such as facial tissues and paper towels to increase their market share through benefits and versatility of usage that are relevant to consumers. The toilet paper sub-category has a higher market share, but it can grow even more by focusing on 2-ply and 3-ply variants, attracting more middle-class and senior consumers, respectively.

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