



# Kimberly-Clark

*Lead the world in **essentials** for a better life.*

IGA Rally  
November 10, 2020



# COVID-19 Creates New Opportunities to Accelerate Growth in 2021



## Health & Hygiene Focus

- ❖ Proactive household and personal care; H&W focus
- ❖ Willingness to pay more for higher quality products linked to health and hygiene
- ❖ Increased cleaning for safety
  - Disposable vs. durable
  - Harsher vs. natural



## Opportunity

- The right products/benefits and messaging, promoting H&W, protective daily routines, and the best clean
- The right cross-category solutions



## Altered B&M Shopping

- ❖ Trip consolidation, especially among vulnerable cohorts
- ❖ Elevated spend per trip; stock-up behavior
- ❖ Faster in-out shopping



## Opportunity

- Simplified assortment
- Larger count pack offerings for stock-up
- Enhanced focus on solutions and solution centers/displays
- Greater reliance on pre-store targeted marketing



## Large Digital Adoption

- ❖ ~4 year accelerated adoption of online
- ❖ Significant growth in CNC and Home Delivery, especially among vulnerable cohorts



## Opportunity

- Grow/Retain via:
  - ❑ Optimized search, taxonomy, content, and digital shelf
  - ❑ A seamless online/in-store experience
  - ❑ Omni-channel programs (i.e. free delivery offers, solutions for Moms, Seniors, and Caregivers)



## Recessionary Behaviors

- ❖ 9 in 10 have changed their shopping behavior in an effort to cut back:
  - Limiting (i.e. shopping less, buying less)
  - Deal-seeking (i.e. coupons, value-size items)
  - Retailer switching



## Opportunity

- Creating value through ease via cross-category solutions/promotions
- Value stock-up offerings
- Establishing loyalty by building brand equity (i.e. safety, giving back)

We make  
happy kids

# Drive Baby & Child Care Growth with K-C Strategies

## Acquisition



A full lineup of premium products, now including **Size 7** for kids who are not ready to potty train!



**26%** Consumers want a pant that delivers elevated benefits such as Comfort & Skin Health

## Premiumization



Our Perfect Diaper got an upgrade!



**63%** Of wiping occasions include **one-handed dispensing**

## Drive the System



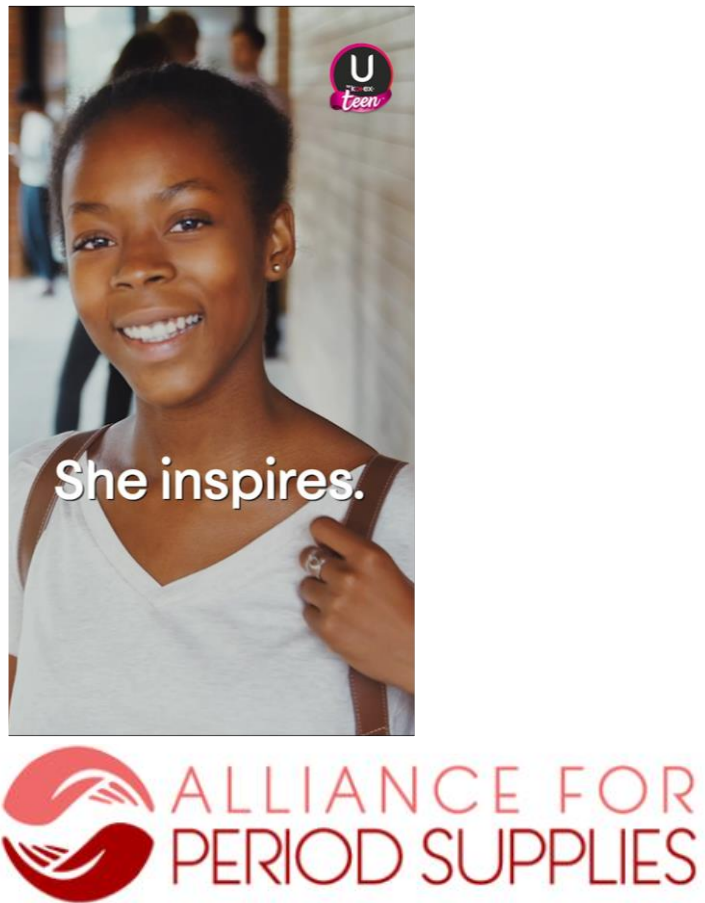
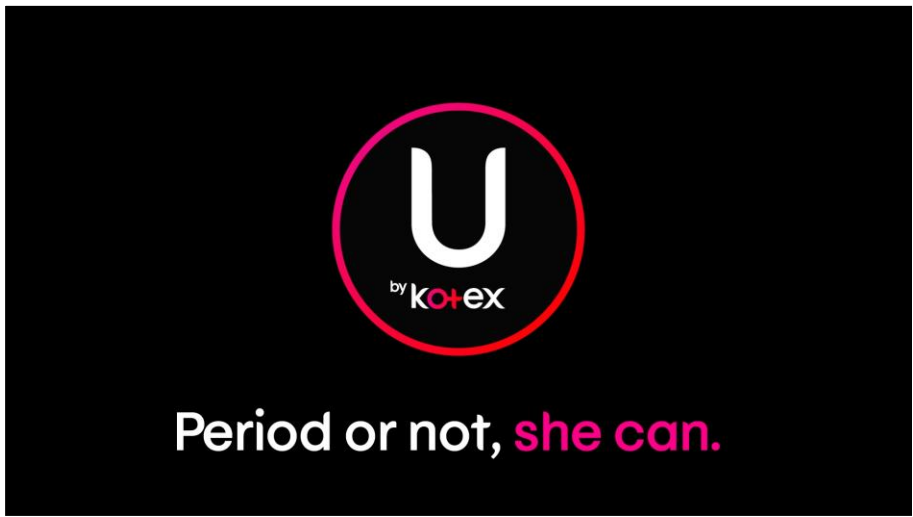
Drive the “system” of Diapers and Wipes  
- **41%** of urine only diaper changes do not include a wipe




Diapering households **spend 2x and use 4x more wipes** than non-diapering households

*\$1.25 Billion in Adult and Feminine Care category growth opportunity over the next 5 years!*


**ELEVATED  
COMMERCIAL  
PROGRAMMING**



**NEW  
DUAL USE PRODUCT  
UNIQUELY DESIGNED TO  
MEET HER PERIOD AND  
BLADDER LEAK NEEDS**




**REFRESHED  
COMMERCIAL  
PROGRAM**




**DRIVE ACQUISITION**

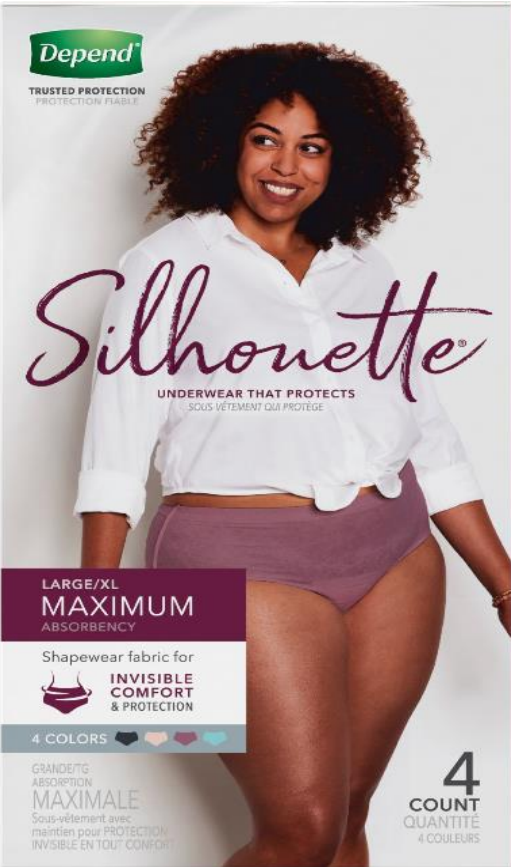
**EXPAND  
MODERATE  
LONG LENGTH  
15% MORE  
COVERAGE**




**IMPROVED  
ABSORBENT  
TECHNOLOGY –  
ABSORBS 40% FASTER**



**ELEVATED  
SILHOUETTE  
NEW SOFTER LINER  
FOR IMPROVED  
EXPERIENCE**



**IMPROVED  
COMFORT WITH NEW  
XXL SIZE AND DRYNESS  
COMMUNICATION**



**GROW USAGE**

**RELAUNCH  
DELIVERS GENTLE  
PROTECTION, KEEPING  
HER COMFORTABLE &  
WORRY-FREE**



**LAUNCH  
NATURAL/ORGANIC  
LE CATEGORY**



**BETTER BENEFITS**