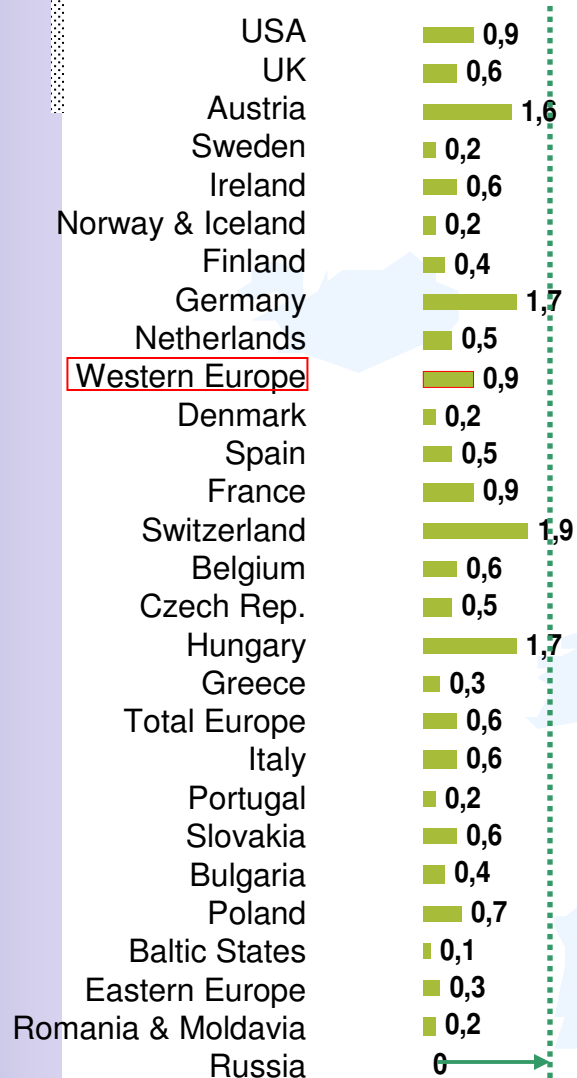


# Potential and actual Consumption per Capita

## Hankies Facials Europe & USA, 2004



<b>Current market</b>	<b>410</b>
<b>Increase +200%</b>	<b>830</b>
<b>Potential Market</b>	<b>1240</b>

**Hankies  
Facials**  
~ +200%

U : Kgs  
Source: TMD 2004 / EU Consulting

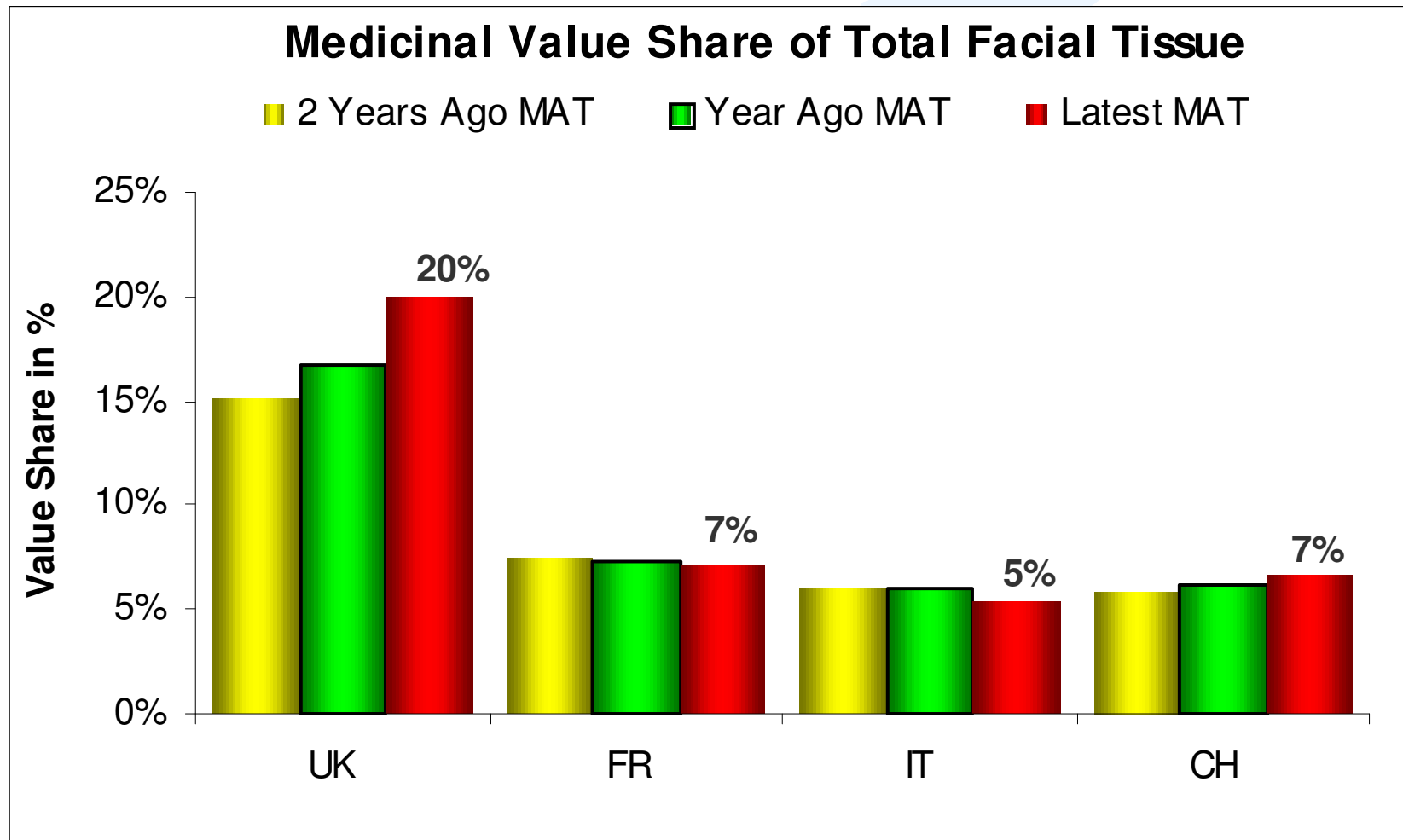
# Innovation in the Medicinal Segment Grows Facial Tissue Category Value -- Importance of Balsam



- Total Facial Category penetration in Europe is static, with the exception of France
- Kleenex® Balsam created the 'medicinal segment' in the Facial Tissue category.
- Developed to meet a true consumer need
- Kleenex® Balsam has contributed £150 million sales in the UK in the last 8 years
- Kleenex® Balsam has been truly incremental to the category

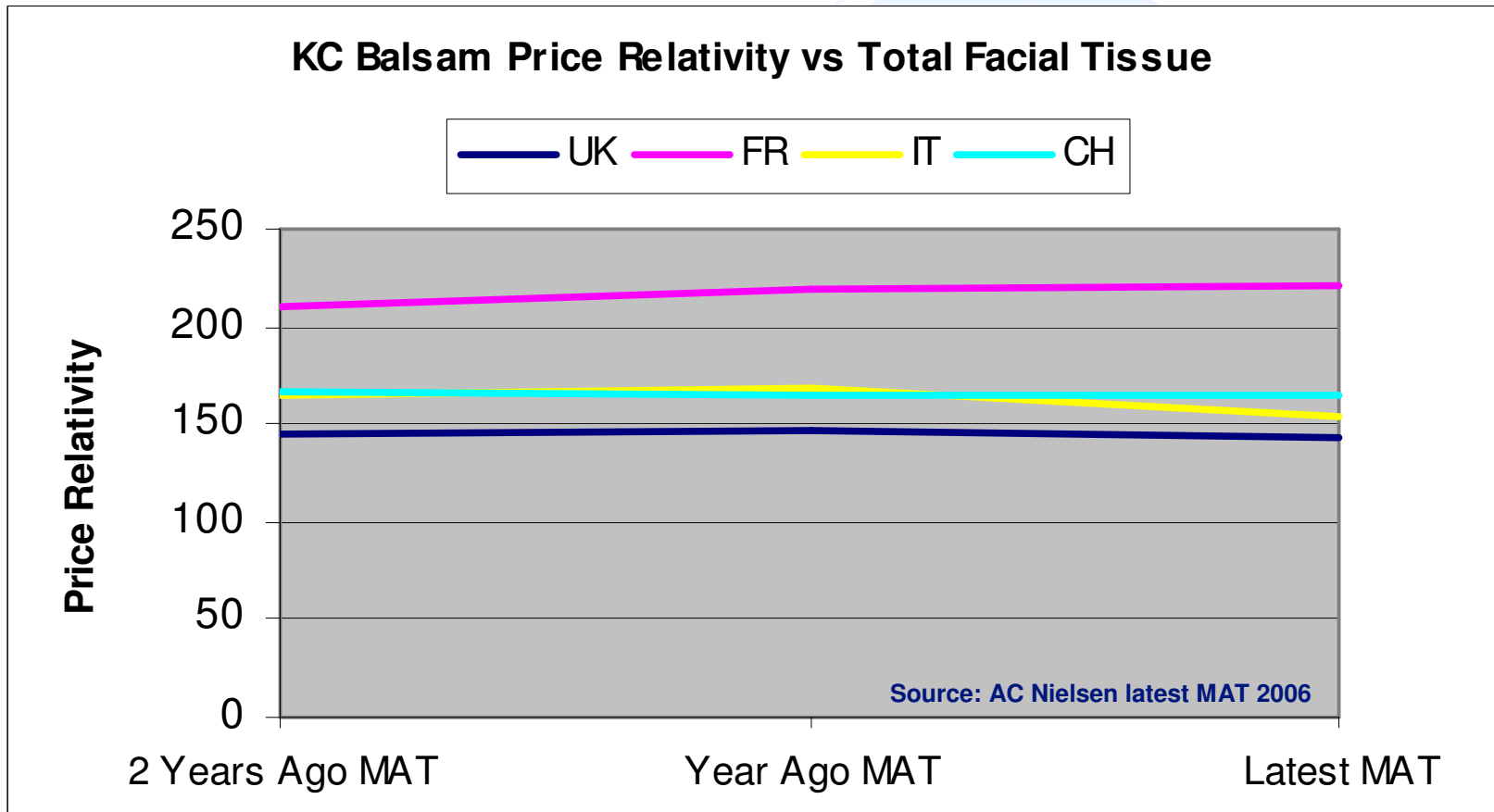


**Medicinal segment is in growth, now worth over £50 Million**  
**The UK shows the growth potential, with the segment now worth 20% of total category sales**



The segment commands premium prices due to added value products.

Kleenex Balsam indexes at over 150% versus category average



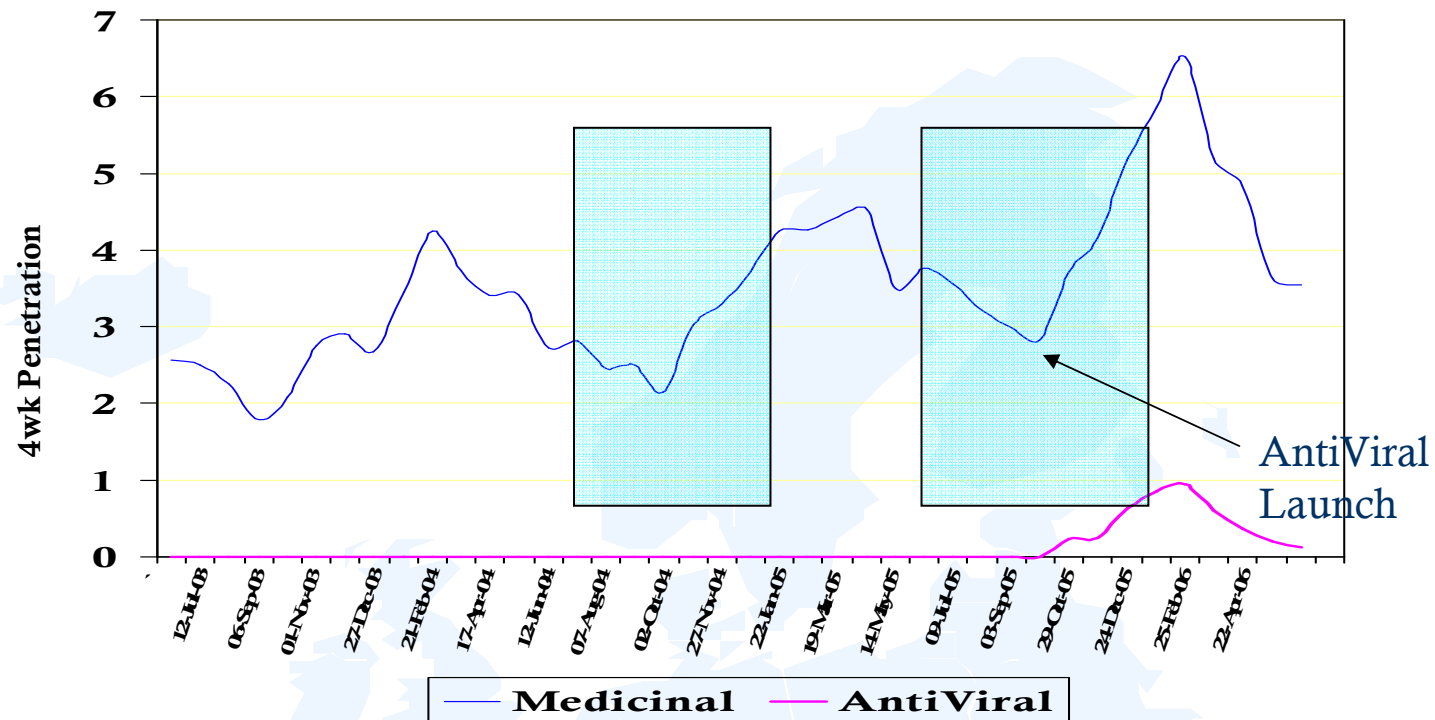
# The latest addition to the 'Medicinal' Facial Tissue Segment, Kleenex AntiViral kills 99.9% of cold and flu viruses in the tissue



# In store Support Key to Trial and driving the total medicinal segment



# Kleenex® Anti-Viral drives increases in total category penetration by bringing in new consumers



## Kleenex® Anti-Viral brings new consumers to the category

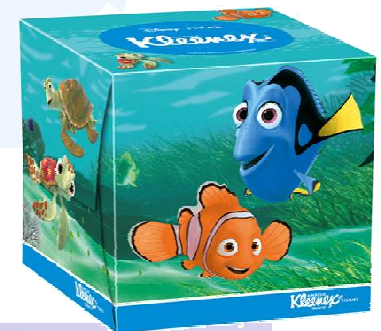
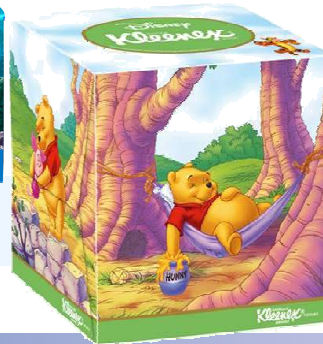
41% of Kleenex® Anti-Viral consumers are either new to the category or have bought Kleenex® Anti-Viral in addition to their normal facial tissue purchase.

# Kleenex® Disney©

**Growing category value by developing the under-penetrated kids segment**

## **Consumer Insight:**

- ◆ HH with children have the highest tissue consumption
- ◆ Fun and appealing designs drive impulse purchase
- ◆ Disney remains the number 1 kids franchise, loved by kids and parents alike





## 60% of facial is bought on impulse – In store visibility is key



# The importance of category and segment visibility : Using promotion Hot spots to drive in store visibility on shelf, penetration and consumption amongst infrequent users

