



AgentRank

BY CONSENSYS 

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How Kimberly-Clark Can Win AI Visibility in Baby Diapers

A country-by-country strategy for improving Huggies AI recommendations, brand visibility in AI, and recommendation share across the world's most contested category in early-parenthood decisions.

28.1%

PAMPERS AI SHARE

20.9%

HUGGIES AI SHARE

#2

KIMBERLY-CLARK RANK

9.7pp

GAP TO LEADER

PREPARED FOR

Kimberly-Clark · Huggies Global Brand Team

EXECUTIVE SUMMARY

A two-brand race. Huggies must win on proof.

AI visibility in baby diapers is becoming a new competitive battleground for Kimberly-Clark. Parents now ask AI assistants which diapers are safest, most absorbent, best for sensitive skin, best overnight, and best value — and Huggies competes not just on shelf, but to become the brand AI systems **choose to recommend**.

The global picture

Pampers leads with **28.1%** AI recommendation share. Huggies is the clear #2 at **20.9%**. The top three brands account for 57% of share — this is not a fragmented category, it is a two-brand leadership race.

From a manufacturer view, Procter & Gamble leads with 30.7% share. Kimberly-Clark ranks second at 20.9%, a 9.7-point gap. Meaningful — but addressable.

The strategic opportunity

Huggies already has high coverage. The real gap is **conversion**: Pampers converts visibility into preference at a **69%** win rate; Huggies at just **12%**. The objective is not to appear more often — it is to **win more often when it appears**.

Closing the gap requires four moves: strengthen proof, localize by country, fix platform weak spots (Claude globally; Gemini in priority markets), and build local retailer & source ecosystems.

*“Kimberly-Clark can win more AI visibility in baby diapers by turning Huggies from a familiar brand into the most **evidence-backed answer** for the specific diaper needs parents ask AI about.”*

THE MODEL

Six drivers that shape every AI diaper recommendation

The Baby Diapers AI recommendation model is built around six drivers. Five are global. The sixth shifts by country — and that is where localization wins or loses.

1 Safety

AI needs confidence the diaper is suitable for babies' skin and daily use.

2 Brand Familiarity

Known brands are easier for AI to recommend in a high-trust parenting category.

3 Absorbency Performance

Parents want proof that the diaper prevents leaks and keeps babies dry.

4 Value-for-Money

Diapers are a repeat-purchase category; price-performance matters.

5 Performance Reputation

Reviews, retailer data, expert mentions, and parent feedback shape strength.

6 Local Sensitivity Driver

Rash prevention, skin sensitivity, or overnight absorbency — varies by country.

MARKET STRUCTURE

Top 2 brands hold 49% of AI recommendation share

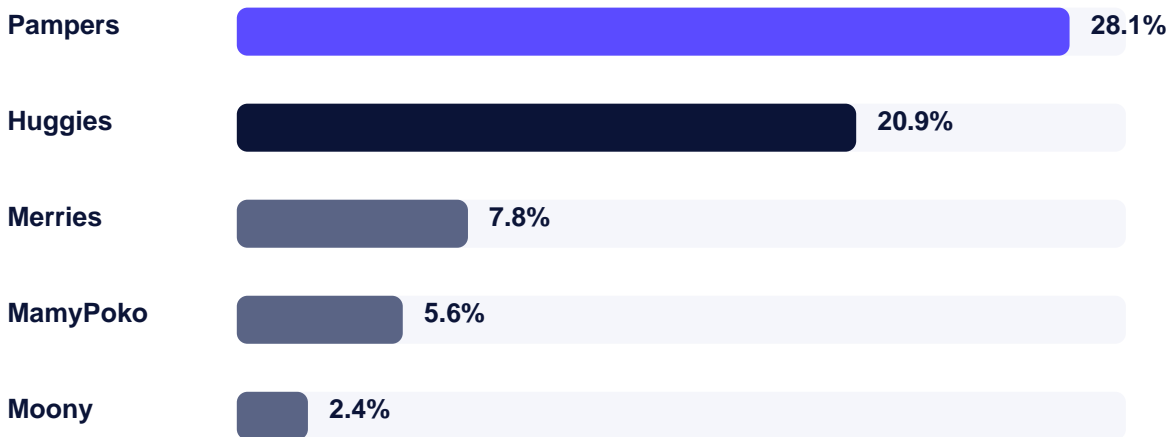
Pampers (28.1%) and Huggies (20.9%) define the category. Merries, MamyPoko, and Moony follow. Concentration favors the challenger that can prove difference, not the one that buys more awareness.

KEY FINDING 01

Baby diapers is a concentrated AI recommendation market

Global AI recommendation share by brand

Share of recommendations across ChatGPT, Claude, Gemini, Grok, Deepseek — June 2026



KEY FINDING 02 - KIMBERLY-CLARK PORTFOLIO

Huggies is the only Kimberly-Clark engine in the dataset

Kimberly-Clark's AI position is entirely driven by Huggies — classified as a **'Defend'** brand and the sole asset in the Baby Diapers AI portfolio. That removes complexity: every AI visibility action can be concentrated on a single brand. No portfolio breadth to manage. No competing internal narratives. One brand, one strategy.

THE CORE PROBLEM

Huggies is visible. Pampers wins the preference.

The gap that matters most isn't share — it's **preference conversion**. When AI sees both brands, Pampers wins almost 7 times out of 10. Huggies wins barely 1 in 8.

PAMPERS

69%

visibility → preference win rate

Strong proof architecture. Clear recommendation language.

HUGGIES

12%

visibility → preference win rate

High visibility. Weak proof-to-preference conversion.

STRATEGIC IMPLICATION

Closing the share gap is a **conversion** problem, not an awareness problem. Huggies needs stronger proof points — absorbency tests, 12-hour leak protection language, hypoallergenic claims, sizing reliability, parent-review evidence — that give AI a concrete reason to *prefer* Huggies when both brands surface in a query.

GEOGRAPHIC PORTFOLIO

Not all #2 markets are the same

Huggies' global footprint is strong but uneven. The strategic mistake would be treating every #2 market identically. Some are within reach of leadership; others have structural gaps that warrant a different posture.

Country	Share	Rank	Gap	Strategic priority
Australia	33.0%	#1	—	Defend leadership
South Korea	28.0%	#1	—	Defend leadership
Vietnam	26.0%	#2	4.2pp	High-priority growth
Malaysia	24.0%	#2	4.4pp	High-priority growth
Philippines	26.0%	#2	5.0pp	High-priority growth
China	23.6%	#3	9.4pp	High-priority acceleration
India	23.0%	#2	10.0pp	Growth opportunity
United Kingdom	22.4%	#2	12.6pp	Growth opportunity
Canada	27.0%	#2	12.4pp	Defend and improve
United States	25.0%	#2	26.8pp	Defend, hard to overtake
Japan	3.2%	#5	29.8pp	Selective expansion

- Vietnam, Malaysia, Philippines — narrowest gaps, highest realistic upside.
- Australia, South Korea — defend AI authority, don't reposition.
- Japan — structurally weak; don't overinvest unless paired with a broader push.

DRIVER CLUSTERS

Three distinct AI conversations Huggies must win

All markets value safety, familiarity, value, and reputation. But the **sixth driver** — the one that tips the recommendation — changes by country. Huggies' message can't be identical everywhere.

ABSORBENCY + RASH PREVENTION

Canada · Germany · United Kingdom · United States

Lead with 12-hour leak protection, dry-lock proof, rash prevention, and parent review evidence. Functional and reassuring.

"Huggies is a trusted diaper for parents looking for strong leak protection, absorbency, and rash prevention."

SENSITIVE SKIN + ABSORBENCY RELIABILITY

France

Lead with gentle skin contact, hypoallergenic materials, softness, and clean ingredient claims. Pair with absorbency reliability.

"Huggies is a reliable choice for parents who want absorbency and reassurance for sensitive skin."

SENSITIVE SKIN + OVERNIGHT ABSORBENCY

Italy · Netherlands · Poland · Spain · Sweden

Lead with overnight dryness, 12-hour comfort, no-leak guarantees, and soft, clean materials. The overnight cluster.

"Huggies is a strong overnight diaper for parents seeking dryness, comfort, and skin reassurance."

WINNING LANGUAGE

The phrases AI needs to repeat about Huggies

AI recommendations use direct, parent-facing language. Huggies should engineer its content so these exact phrases appear consistently across PDPs, FAQs, retailer pages, and review responses.

✓ WINNING PHRASES**Long-duration dryness**

“12h leak channel” · “12 hour leak protection” · “dry lock layer”

Leak prevention

“no leaks” · “leak protection all night”

Skin reassurance

“hypoallergenic materials” · “gentle on delicate skin” · “soft like cotton”

Cleaner materials

“zero chlorine bleaching” · “certified clean contact”

Overnight performance

“keeps baby dry overnight” · “leak protection all night”

✗ NEGATIVE DRIVERS**Missing total absorbency test**

AI lacks proof the product performs.

No lotion-free claim

Sensitive-skin reassurance is weaker.

Weak wetness indicator copy

Parent usability benefit unclear.

Inconsistent sizing feedback

Fit affects leakage; AI hedges.

Vague eco / material claims

Sustainability language lacks proof.

THE PRINCIPLE

AI recommendations are strongest when the reason to recommend is obvious.

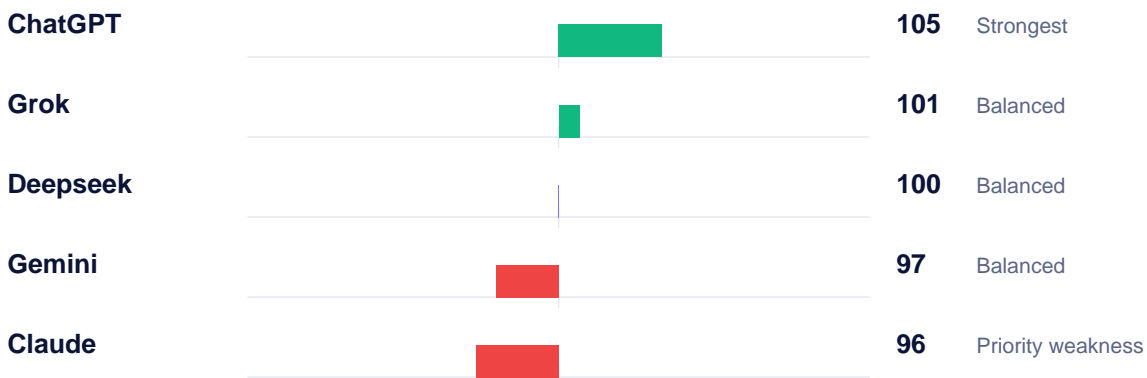
Remove ambiguity. Engineer proof. Give AI an unmissable reason to choose Huggies.

AI PLATFORM SCORECARD

Claude is the priority global fix

Global platform variance for Kimberly-Clark is only 9 index points — relatively healthy. But country-level variance is far larger, and that is where AI risk hides.

Performance index by platform (100 = global average)



Where local platform gaps hide global averages

Country	Leading AI	Weakest AI	Gap	Priority
China	Deepseek	Gemini	114 idx	Critical
Indonesia	Deepseek	Claude	68 idx	High
Poland	Claude	Gemini	61 idx	High
United Kingdom	ChatGPT	Gemini	58 idx	High
Vietnam	Gemini	Deepseek	58 idx	High
Philippines	Deepseek	Gemini	58 idx	High

LOCAL TRUST ECOSYSTEMS

AI listens to different voices in every market

AI recommendations don't form on Huggies.com alone. They form across retailer PDPs, parent forums, consumer testing bodies, and expert sources — and the mix is unique to every country.

Market	Retailer ecosystem	Source ecosystem
United States	Target, Walmart, Amazon, Costco	Babylist, What to Expect, Reddit, pediatrician recs, Amazon reviews
United Kingdom	Boots, Tesco, Amazon UK, Sainsbury's, Asda	Mumsnet, BabyCentre UK, Which?, Amazon UK reviews
Germany	Rossmann, Müller, Babymarkt, dm	Öko-Test, Stiftung Warentest, midwife blogs, Babelli
France	Carrefour, Monoprix, E.Leclerc, Auchan	Magimaman, UFC-Que Choisir, 60 Millions, Doctissimo, Yuka
Italy	Esselunga, Coop, Tigotà, Carrefour Italia	Altroconsumo, SIP, Pianeta Mamma, INCI Beauty
Spain	Mercadona, Primor, Druni, Carrefour ES, El Corte Inglés	Ser Padres, OCU, pediatrician recs, Club Bebé
Netherlands	Albert Heijn, Kruidvat, Etos, Bol.com	Ouders van Nu, Consumentenbond, consultatiebureau
Poland	Biedronka, Hebe, Allegro, Rossmann	Mama i Dziecko, Babyonline, Allegro reviews
Sweden	ICA, Coop, Apoteket, Lyko	Råd & Rön, Vårdguiden 1177, BVC advice
Canada	Walmart CA, Real Cdn Superstore, Amazon CA, Costco CA	Babylist, Today's Parent, Reddit, pediatrician recs

PRINCIPLE The trust map is local. Huggies' AI strategy must be local too.

HOW TO WIN

Five moves that close the gap to Pampers

01

Own the “safe performance” territory

Become the AI answer for parents who want a diaper that is safe, absorbent, gentle, and reliable. Don't separate skin reassurance from absorbency — parents need both.

02

Turn Huggies into the proof-backed alternative to Pampers

Build comparative proof on leak protection, fit, sensitive skin, rash prevention, and value per diaper. Give AI a stronger reason to say: “Huggies is a strong alternative.”

03

Localize by parent concern, not by translation

Absorbency + rash prevention in US, UK, Canada, Germany. Sensitive skin in France. Overnight dryness across Italy, Netherlands, Poland, Spain, Sweden.

04

Fix Claude globally and Gemini in priority markets

Improve Huggies authority signals on Claude worldwide. Diagnose and lift Gemini performance in China, UK, Poland, and the Philippines.

05

Build the Huggies AI influence map by country

Match retailers and sources market-by-market. Without an operating layer, AI strategy stays abstract.

CONCLUSION

The winning diaper brand won't be the one parents know. It will be the one AI can most confidently explain.

AI visibility in baby diapers is now a strategic growth issue for Kimberly-Clark. Huggies is already the #2 brand globally — but visibility alone is not enough. Pampers leads both share and preference conversion. The path forward is country-by-country: defend Australia and South Korea, accelerate Vietnam, Malaysia, Philippines, China, India, and the UK, and be selective where structural gaps are wide. Strengthen Claude globally. Build retailer and source influence maps locally. And most of all — give AI the proof it needs to prefer Huggies for the specific parent question being asked.

NEXT STEP

Walk through the Huggies AgentRank workspace

See country-level AI share, platform variance, winning phrases, retailer and source influence maps, and a live recommendation evidence pack — built for the Huggies brand team.

GET IN TOUCH

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SIGN UP FOR THE PLATFORM

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