

Winning Today, Winning Tomorrow

Nitin Paranjpe, President Home Care

29th November 2017



**BRIGHTEN
LIGHTEN**

**EVERY HOME
EVERY LOAD**



Home Care Role: Step up Value Creation

Strategy

WINNING
TODAY
WINNING
TOMORROW

Key thrusts

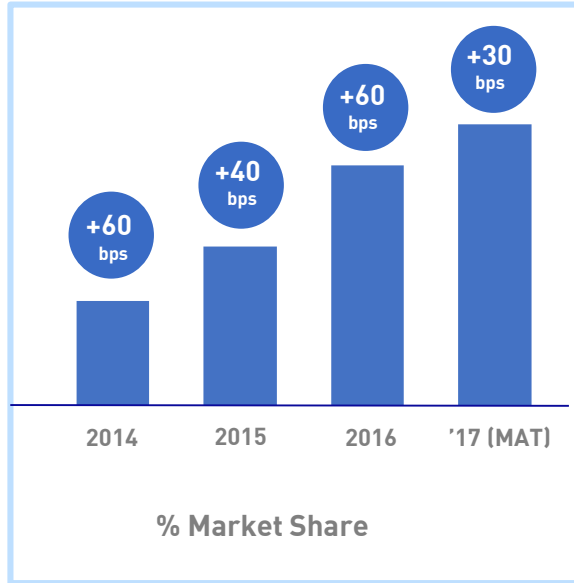
- ❖ Brilliant basics
- ❖ Future proof portfolio
- ❖ End to end value creation

Successful In Delivering On Our New Role

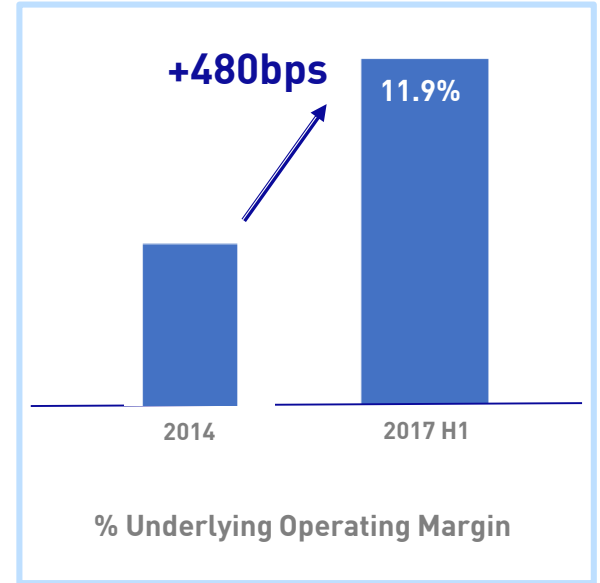
Restoring competitive growth



Gaining Share



Improving profitability



Now well-placed to deliver even more value

Well Placed: Strong Brands

Fabric Cleaning



€7bn



Fabric Conditioners

Comfort

€1bn

Snuggly

Household Care



€2bn

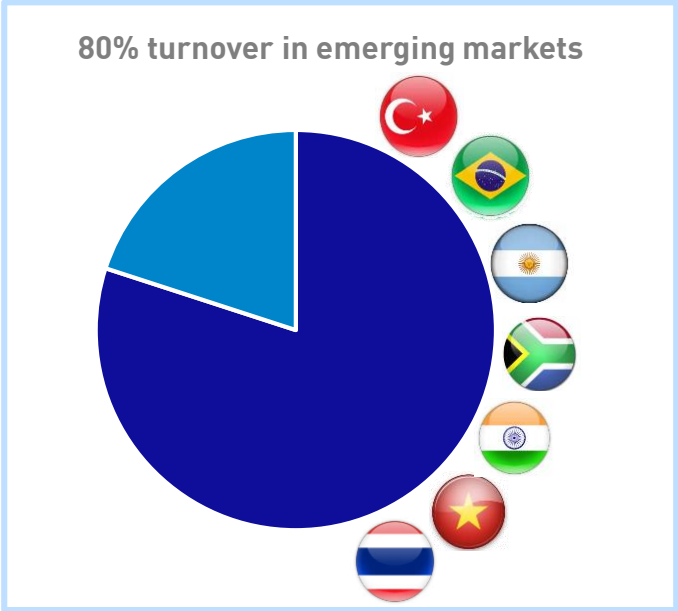


€0.5bn

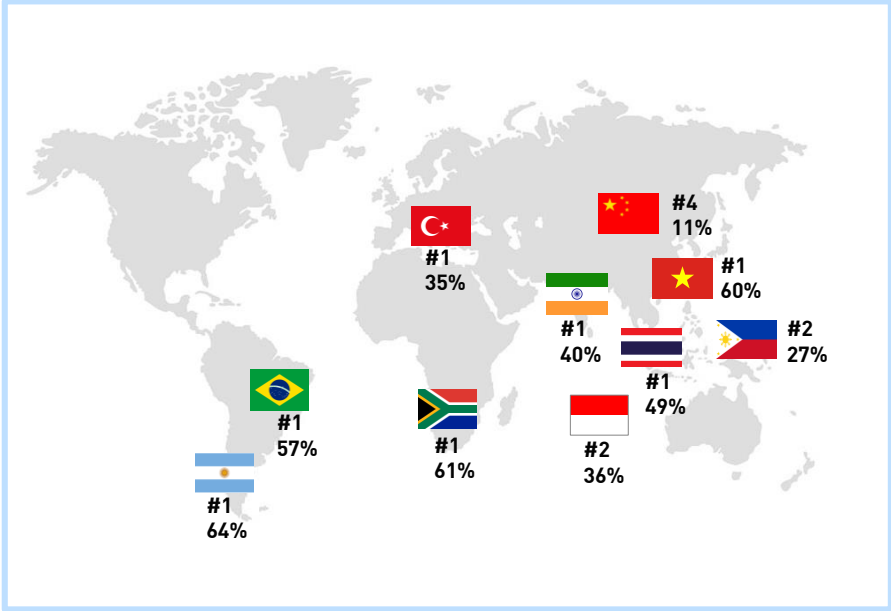


Well Placed: Attractive Markets

Strong Geographic Footprint



Leaders in 7/10 of our Top D&E Markets



Leading the market with **30%** share where we play

Future Proof Portfolio: Leverage Strength in Emerging Markets

India



China

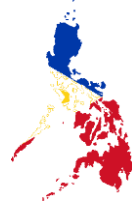


= 40% of the growth

Vietnam



Philippines



= Size of USA growth

Nigeria



Pakistan



= Size of Brazil growth

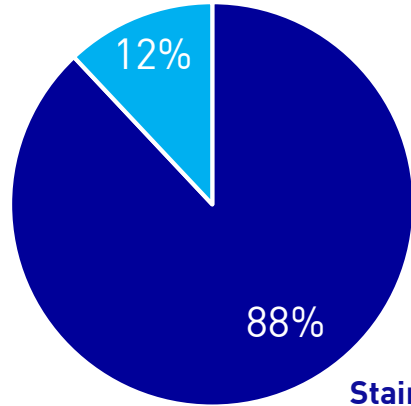
85% of the market growth to come from emerging markets

Future Proof Portfolio: Growth From Future Benefits

Fab Clean Benefits Composition

Care
Hygiene
Naturals/Eco

2x CAGR



Stain removal
Whiteness
Fragrance

Key Thrusts

Sensitive



Naturals



Health & Hygiene



Portfolio Reshaping: Growth From New Channels

Pure Play

Win with the Winners



Grocery Online

Strengthened Cooperation



Services & Licencing

Piloting & Experimenting



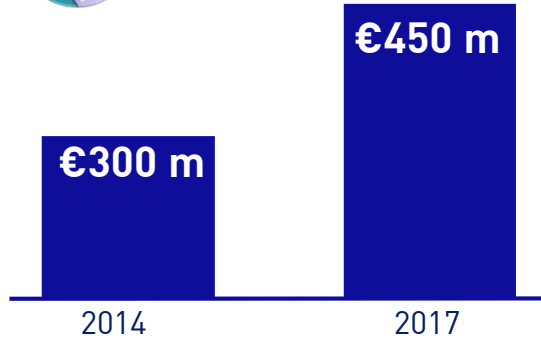
Already > 4% of turnover: €1 billion opportunity

End to End Value Creation

5S



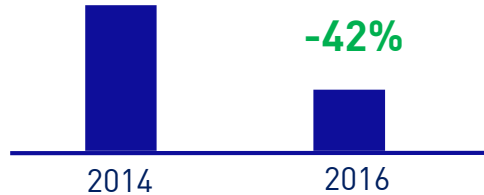
Material Savings



5S
Design to Value
Efficient Processes

Simplification

Chassis Reduction



-65% Laundry Powders
-52% Toilet Cleaners
-49% Laundry Liquids

ZBB & NRM



ZBB: €130m

NRM: 15 markets
€35-40m

Home Care Strategy is Delivering

Strategy

WINNING
TODAY
WINNING
TOMORROW

Sharper Focus

- ❖ Brilliant basics
- ❖ Future proof portfolio
- ❖ End to end value creation
- ❖ **More Global, More Local, More Agile**

C4G: More Global

Brands with Purpose

Key brands with purpose



Sustainable living brands

Differentiated Technology

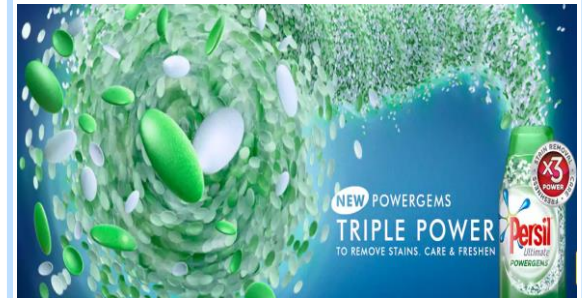
e.g. CIF Power & Shine – Water & Dirt repellent technology



Strengthened unique claims

New Formats

e.g. Persil Powergems



More than 20 patents

C4G: More Local

Surf Fragrance Capsules



Idea to launch in 9 months

Omo Plus



Idea to launch in 8 months

Omo Washing Machine Cleaner



Idea to launch in 7 months

Livopen



Idea to launch in 6 months

Comfort Skin Friendly



Idea to launch in 6 months

Cif Duo



Idea to launch in 6 months

Target: Reduce time from idea to launch by 50%

C4G: Example - Cif Duo

Locally led



Built on local insight

Idea to launch

6

months



Unique double cleaning action

Globally deployed

Relevant for global consumers

Number of rollouts

15

markets



Differentiated C4G model: Think Local, Act Global

Summary

WINNING
TODAY 
WINNING
 **TOMORROW**

- Strategy is delivering
 - Consistent competitive growth
 - Significant step up in margins
 - Actions to future proof portfolio
- Plenty of run way for continued value creation
- C4G ushering in transformational change
 - More global and more local
 - Unlocking speed and agility

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