

# Unilever 2011 Investor Seminar

## Istanbul, Turkey

30<sup>th</sup> November – 2<sup>nd</sup> December 2011



# What I want to talk about



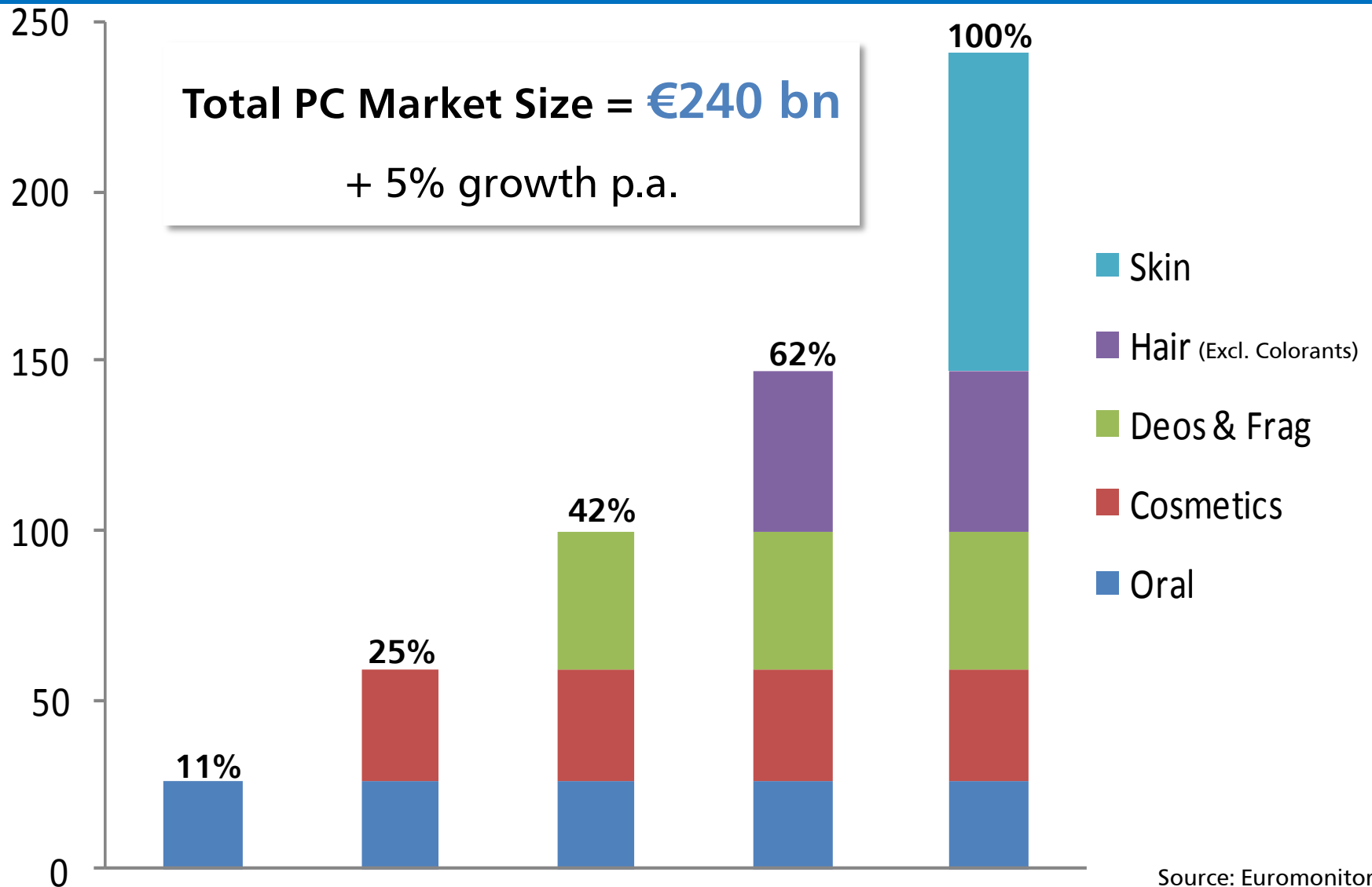
- First Impressions
- Opportunities
- Acquisitions
- Capabilities

# First Impressions – Personal Care

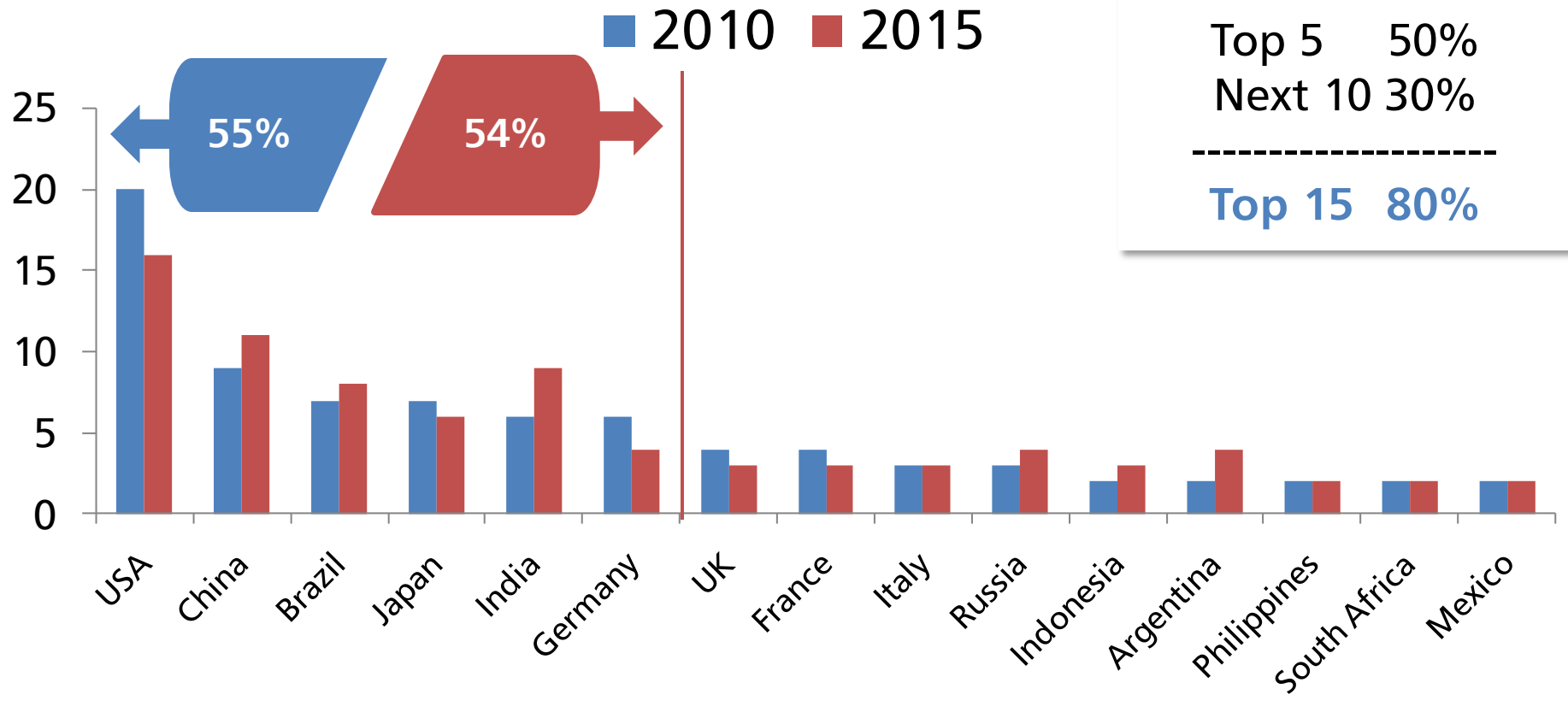


- It's a **BIG** market
- We play in **only a part**
- Our momentum is **improving**
- We have **strong plans** for 2012
- **And** even bigger aspirations for the future.

# It's a Big market

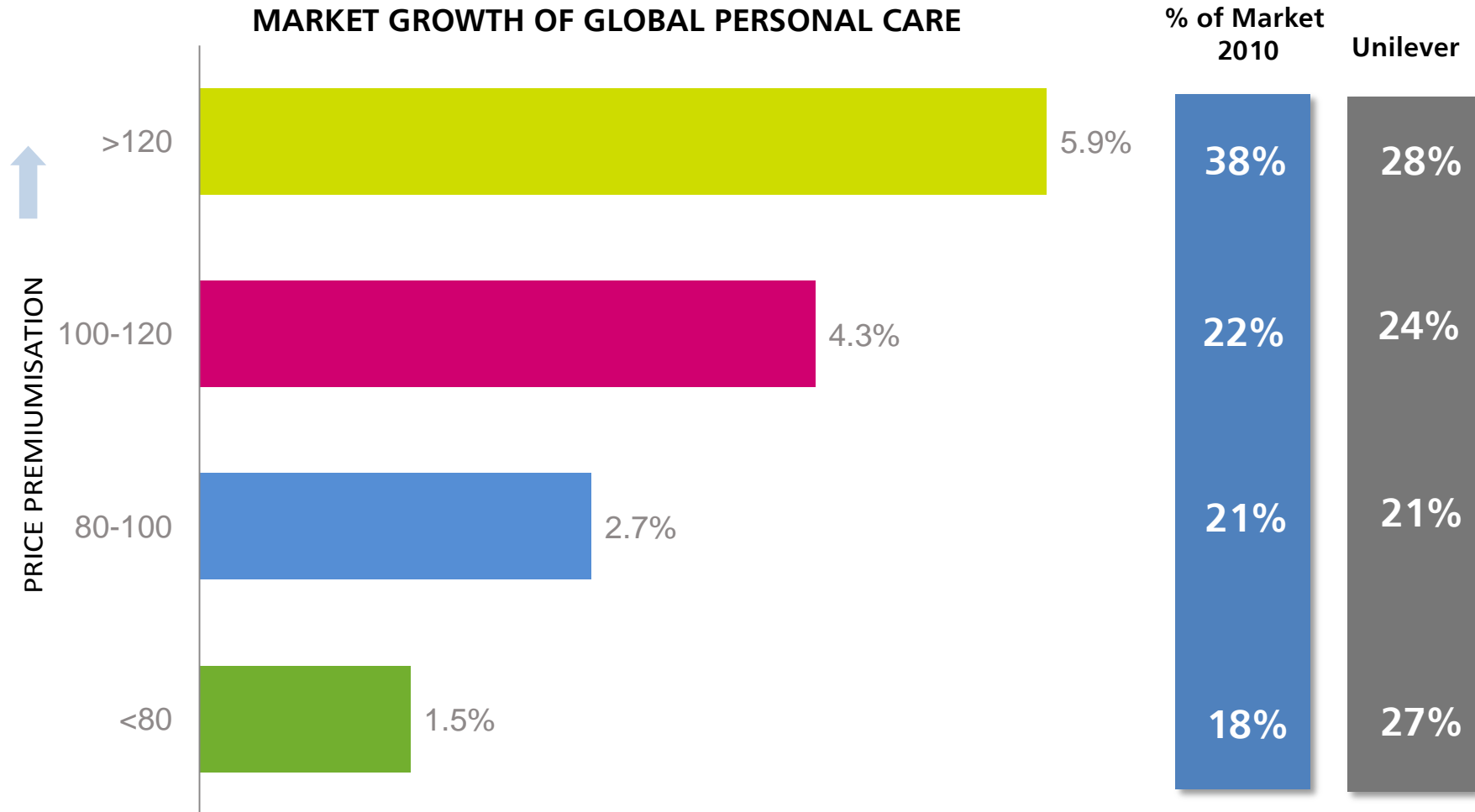


# Global Market is Consolidated



**% Country Contribution to total PC Market Size**  
(Unilever Categories)

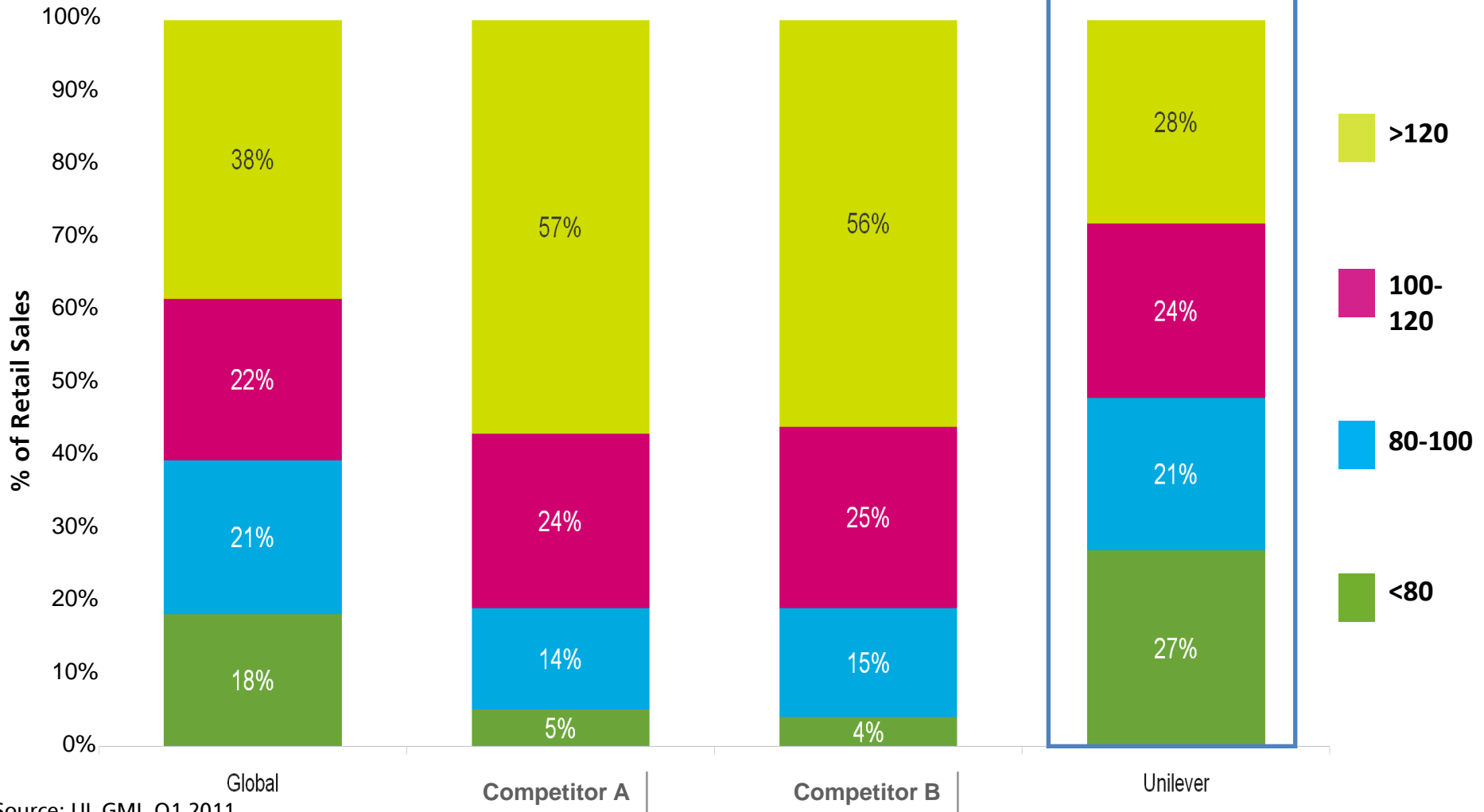
# Premiumisation: Reaching up – Market Premiumisation



# Premiumisation: Reaching up – Under Trade in Premium



## % Retail Sales by Price Point



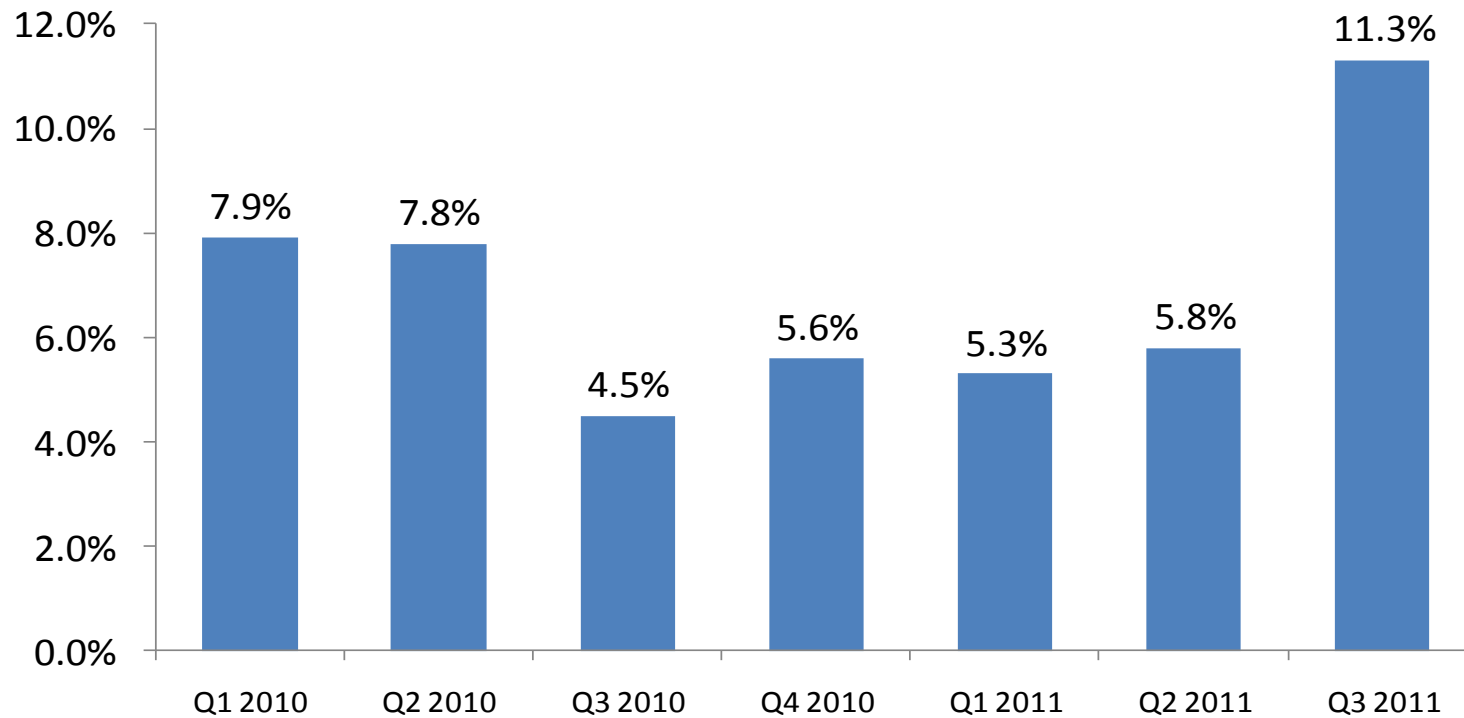
Source: UL GMI, Q1 2011

# We are stepping up our Performance



## Personal Care

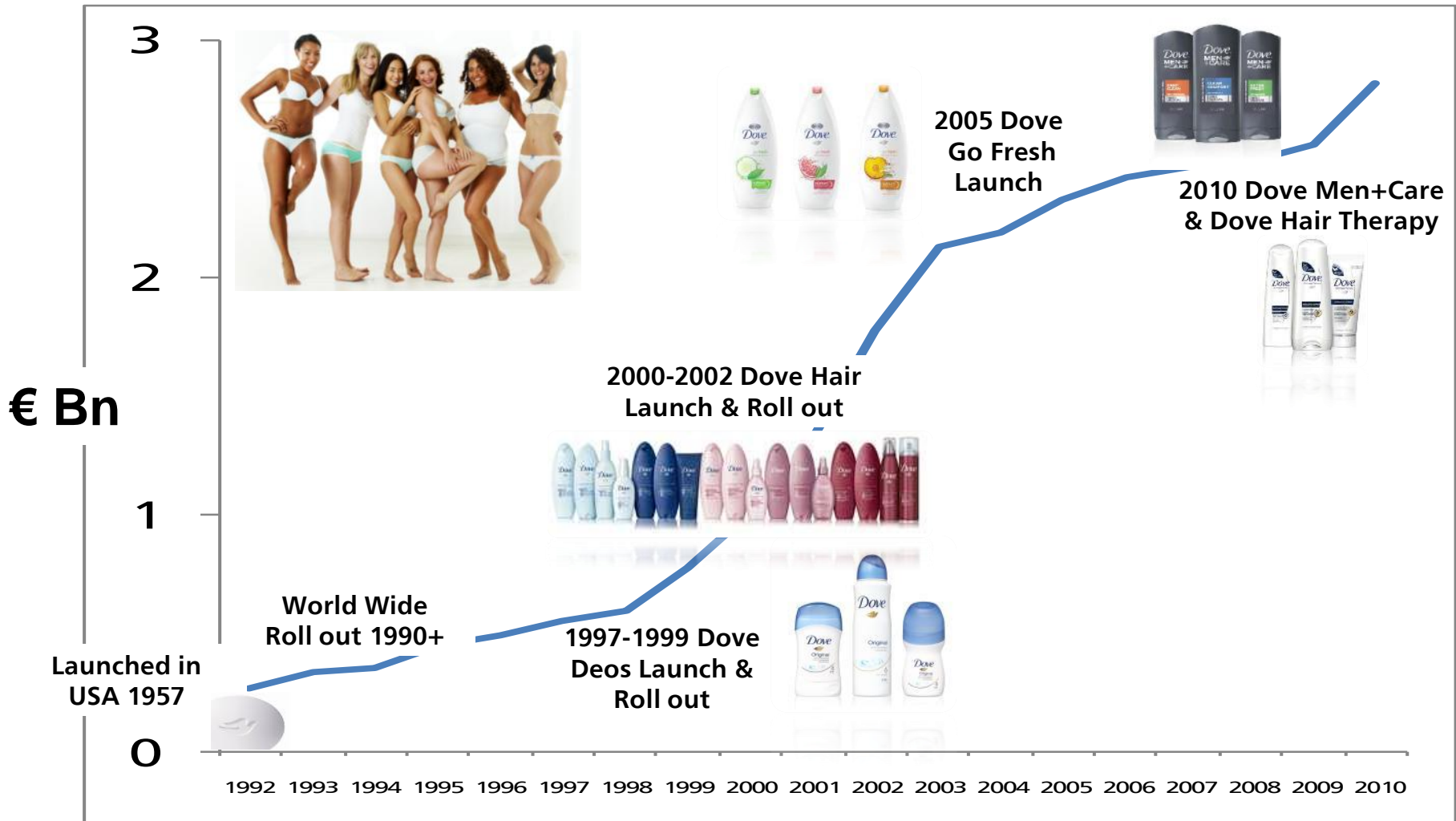
### % USG



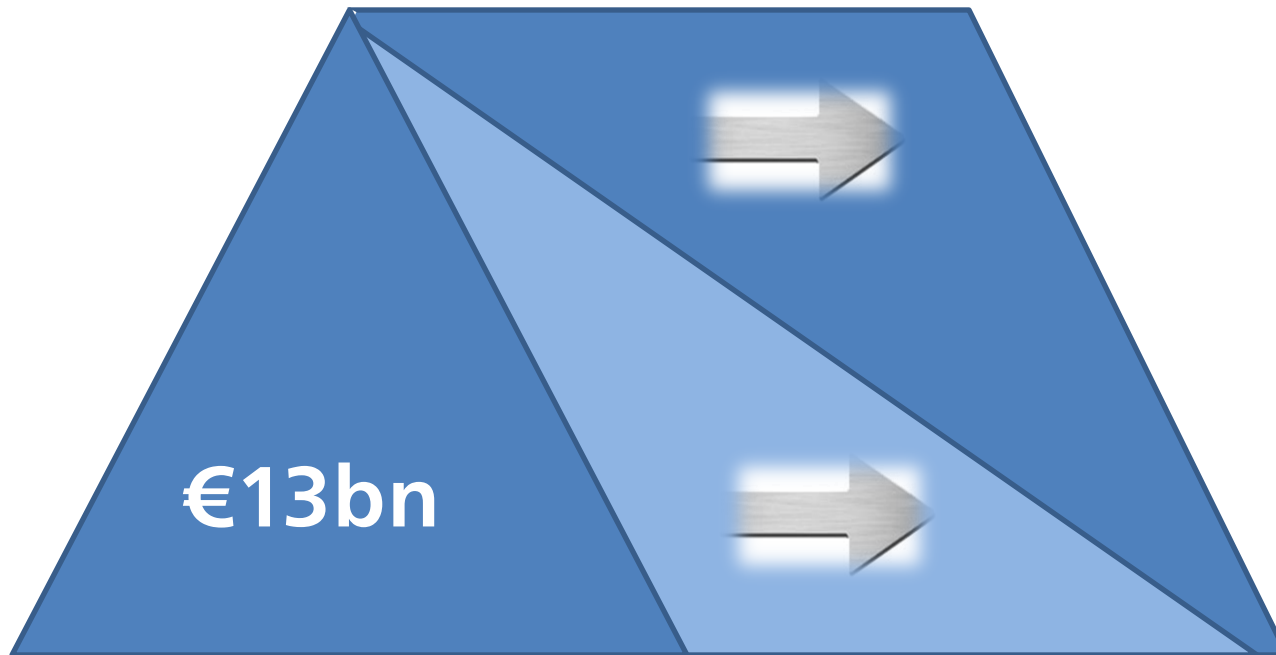




# Dove – €3Bn



# Opportunities



- 1 Building a broader foundation
- 2 Adding a new storey

# Building a Broader Foundation



1

- Strengthening Portfolio

2

- Innovation on the Core

3

- Market Development

# 1 Strengthening Portfolio



## 2 Innovate on the Core: Axe Excite



## 2 Innovate on the Core: Lux



**LUX**  
Declare your beauty

**NEW!**  
Silk Protein  
Extract

**LUX**  
Strawberry & Cream

**LUX**  
Peach & Cream

**LUX**  
Purple Lotus & Cream

**LUX**  
Unilever

India's best beauty soap  
just got better.

Enjoy silky skin like never  
before with New LUX.

The advertisement features a central image of a Lux soap bar with a pink dropper above it, dispensing a drop of pink liquid. The background is a soft, bokeh-style pink and purple gradient. The Lux logo and tagline are in the top left, and the Unilever logo is in the top right. The product names and 'NEW! Silk Protein Extract' are on the left. The main headline and sub-headline are on the right.

## 2 Innovate on the Core: Dove Hair Damage Therapy



## 2 Innovate on the Core: White Now





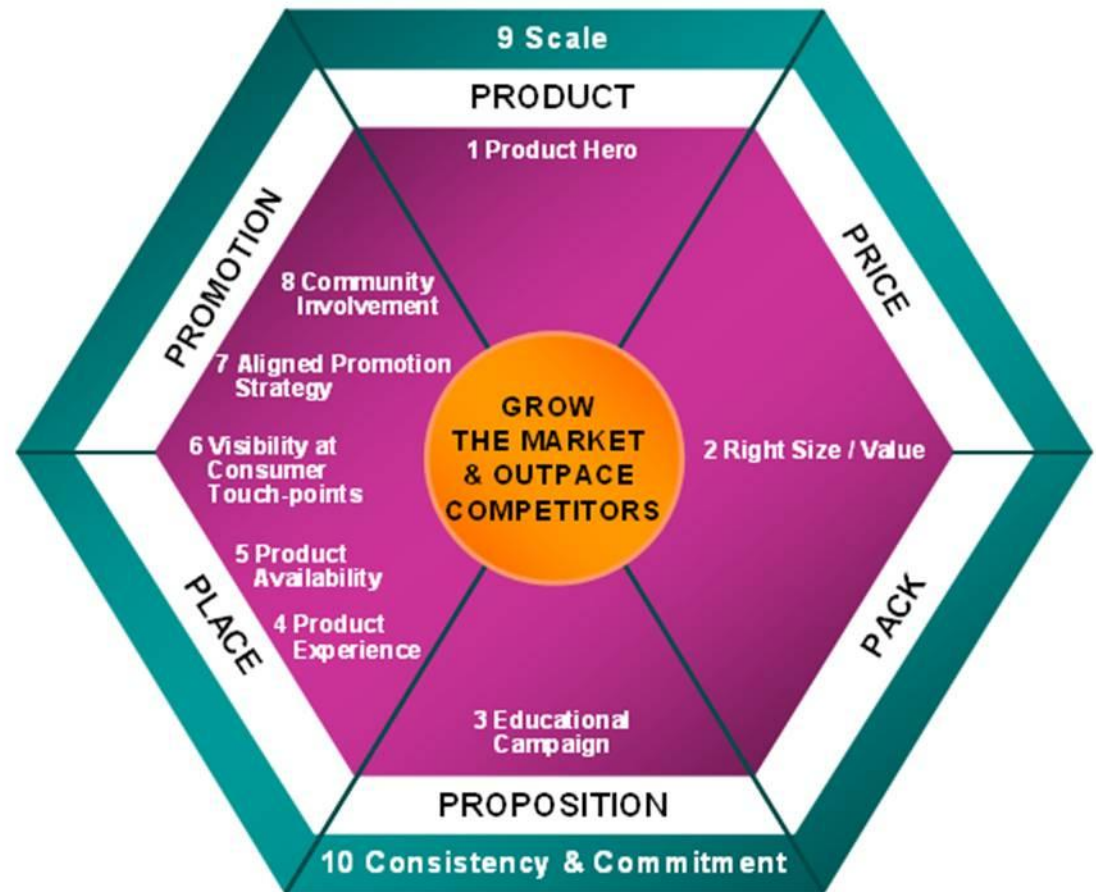
## 2 Innovate on the Core : Radox SPA



# 3 Market Development



- More Users
- More Usage
- More Benefits



# 3 Market Development: Signal Toothpaste



50% of the world's population do not brush twice a day

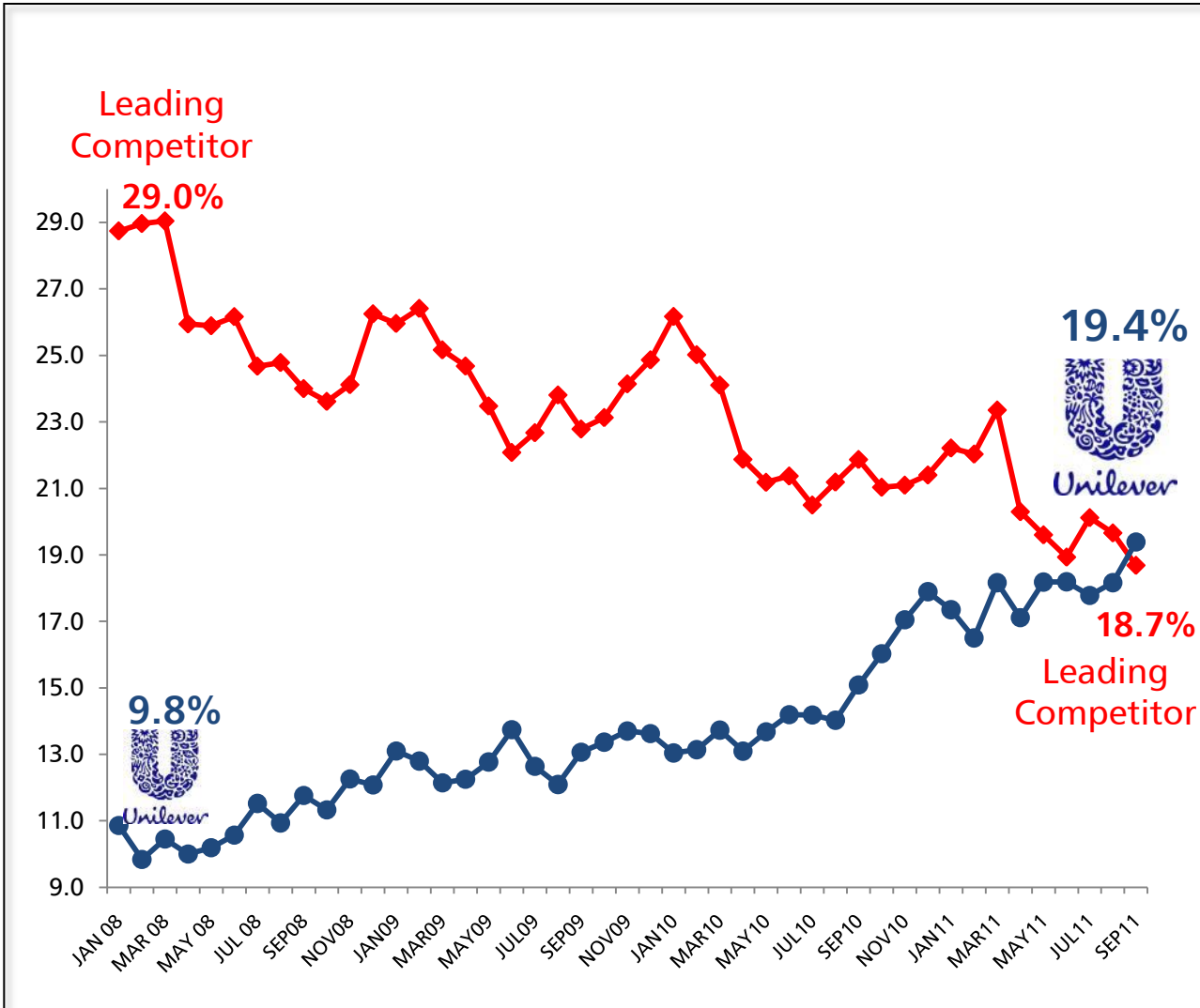
# 3 Market Development: Lifebuoy



70 M people in rural India

impacted by the largest private Hygiene Education Programme in the world

# Results: Winning in Body Wash China



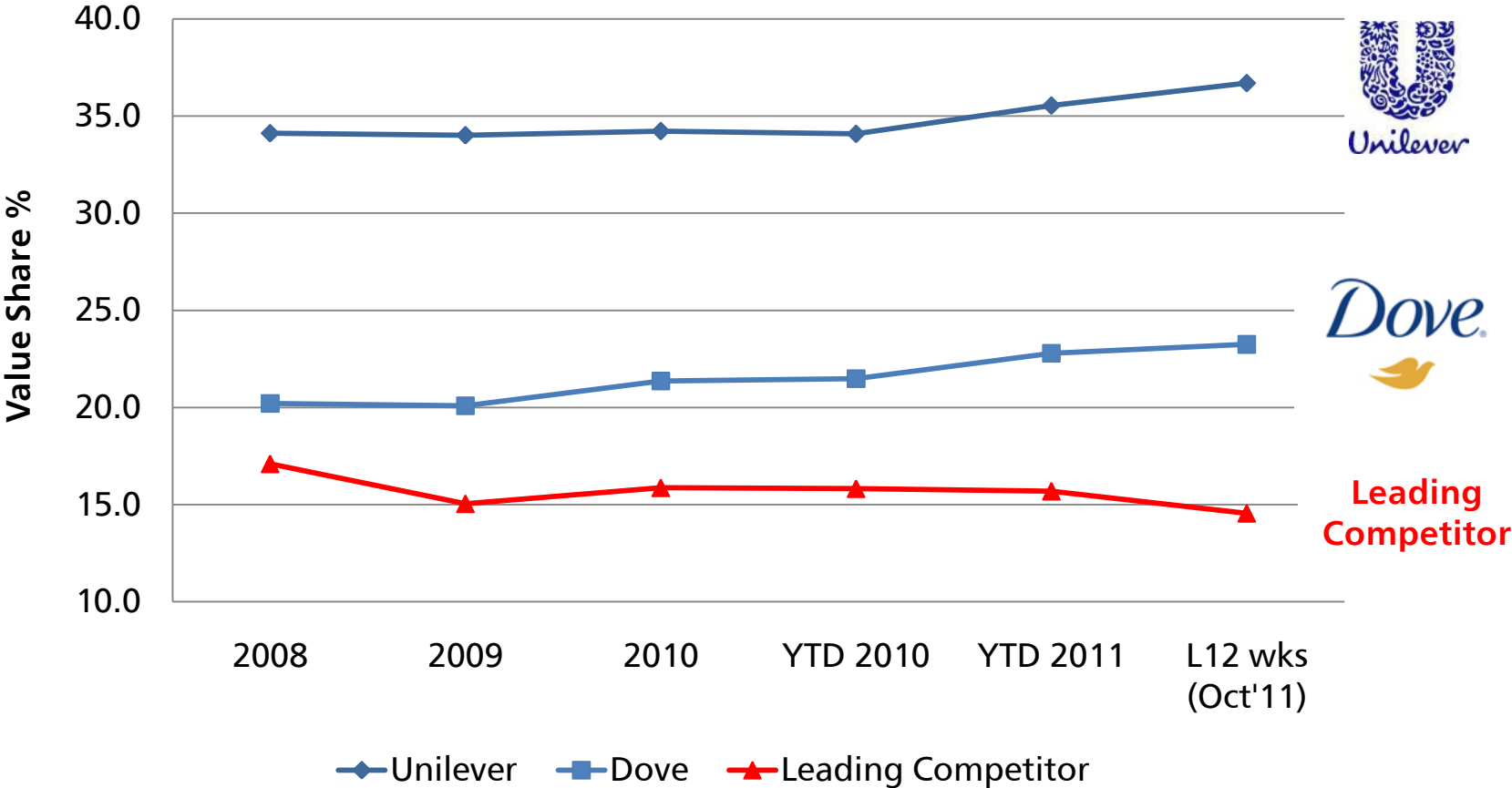
Develop market via strong portfolio



# Results: Record Shares in US Body Wash



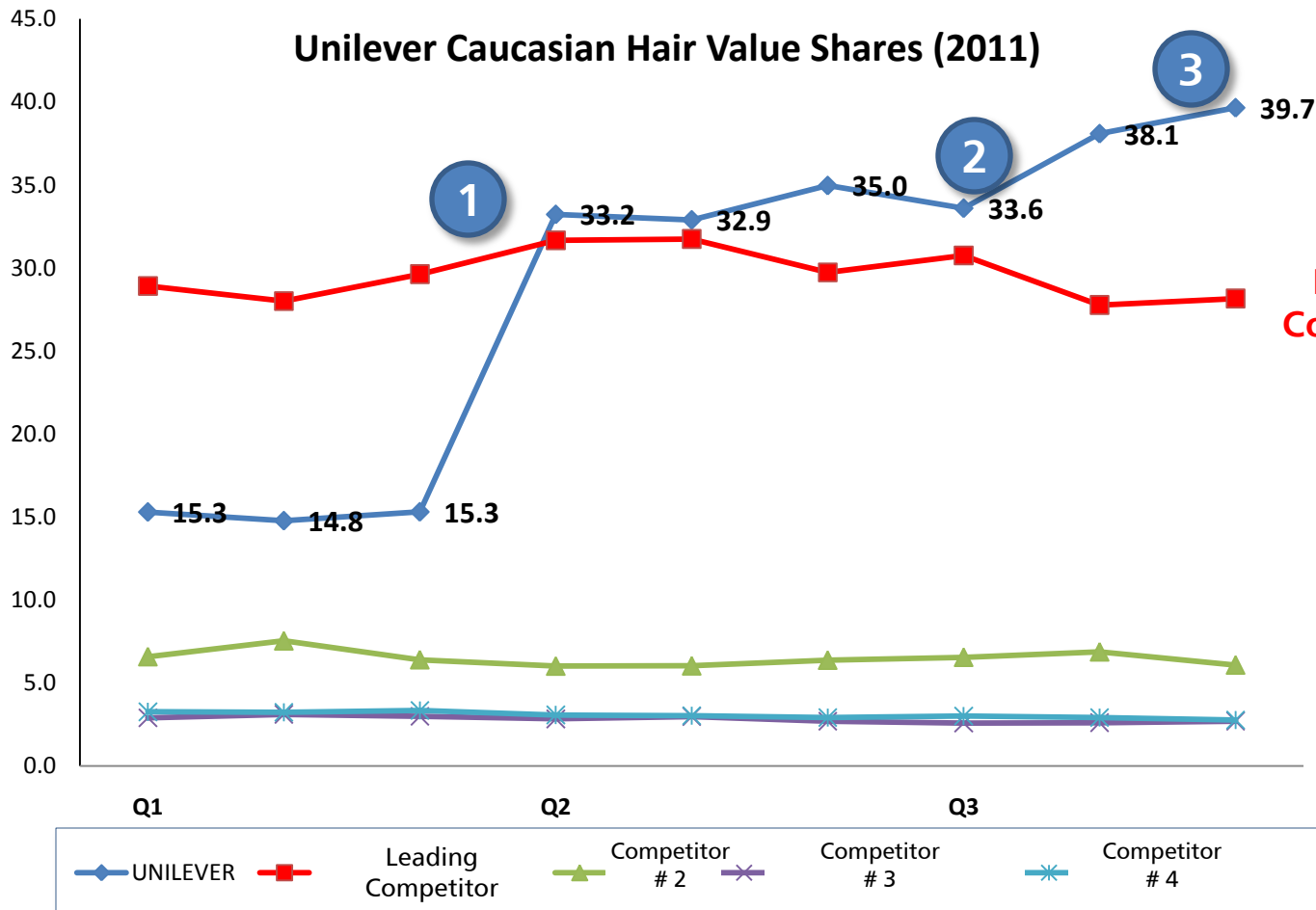
Value Share PW AOC



Leading Competitor

Source: Nielsen Flash Report, Oct'11, UL incl. AC, Dove total (Female + Male), P&G incl. Zest.

# Results: South Africa Hair # 3 to # 1



**Leading Competitor**

## How?

**1**  
Acquisition of **TRESemmé**  
professional styling  
**V05**

**2**  
Launch of Dove Hair

**3**  
Launch 6 mths early

Source: Nielsen

# Building another storey



1

- Portfolio & Route to Market

2

- Premium Innovation

3

- New Business Development



# 1 Portfolio & Route to Market



TIGI



TONI&GUY  
HAIRDRESSING



Бархатные  
Руки



Сто  
РЕЦЕПТОВ  
КРАСОТЫ



# 2 Premium Innovation



INGREDIENTS

HYPER-DISTILLATION

HAIR REBORN

**TIGI**  
HAIR REBORN

HYDRA-BALANCE SHAMPOO  
SHAMPOOING • SHAMPOO • SHAMPOO

NET WT 8.1 FL OZ (230 ml)

HAIR REBORN

## Hair Reborn

**BED HEAD**  
TIGI

INTRODUCING NEW  
**CANDY FIXATIONS**

PLANNED FOR THE FUTURE

**MEG**  
TIGI

**SUGAR DUST**  
TIGI

**TOTALLY BAKED**  
TIGI

**SUGAR HOCK**  
TIGI

**GLAZE LAZE**  
TIGI

# 2 Premium Innovation



**TONI & GUY**  
HAIRDRESSING



## 2 Premium Innovation



# 3 New Business Development

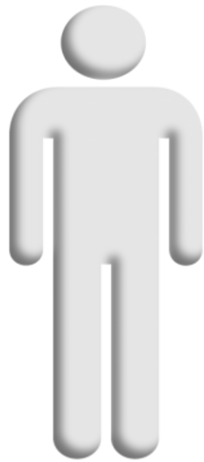


**(1) SALONS:**  
e.g. TIGI, Ponds Institute & Dove Spa

**(2) DEVICES:** e.g. Dove Hair & Clear Scalp Diagnostic Tools, Pond's Skin Diagnostics



# And then there is Men....



€20 Bn Market Opportunity

# Acquisitions





# Much more than TRESemmé



MOTIONS®







# 3 KPI's



## 1 Growth

**Growing Hair Share**

- US +30 bps
- Canada > +100 bps
- UK +20 bps
- Mexico +10 bps

## 2 Synergies

Over **half** of our expected cost synergies achieved in '11

We will **exceed 10%** synergies in 2012

## 3 Talent

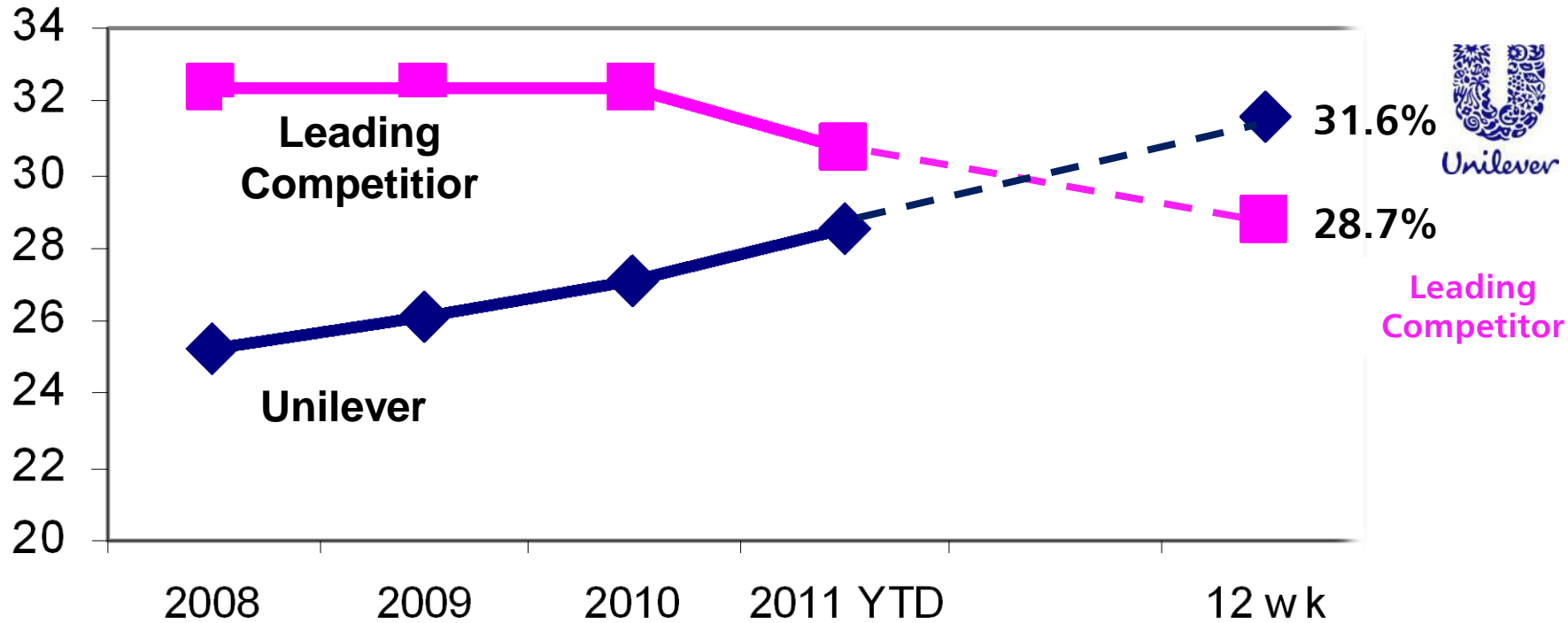
**70%** of leaders accepted key roles



# Market Share Leadership in US



### Daily Hair Care Value Share



# Expanding Brands into new markets... TRESemme now in Brazil



On shelf November 1... 175 days from close

# Expanding Brands into new markets... And into Thailand



TRESemmé  
USED BY PROFESSIONALS



ใหม่ เทรซามเม่

ผมสวยมีสไตล์ระดับโลกที่บ้าน...ทุกวัน



ผลิตภัณฑ์ดูแลและจัดแต่งทรงผมที่ช่างผมมืออาชีพเลือกใช้ มาถึงเมืองไทยแล้ว  
พร้อมสูตรที่พัฒนามาเพื่อเส้นผมคนไทยโดยเฉพาะ\*

\*เวลาที่คุณใช้ ผลิตภัณฑ์ เทรซามเม่ คุณจะได้สัมผัสกับเส้นผมที่นุ่มนวล

# Leveraging US Heritage with Motions relaunched in South Africa



On shelf November 15... 188 days from close



Pure Line



Black Pearl



Silky Hands



100 Recipes of Beauty

# Capabilities



- Holistic **brand design**
- Drivers of added value in new **Premium Beauty**
- Ahead of **Trends**
- **Go to Market** excellence

# First Impressions – Personal Care



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## 4. Personal Care & Brands VT