

# Winning in Laundry

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## Safe harbour statement



This presentation may contain forward-looking statements, including 'forward-looking statements' within the meaning of the United States Private Securities Litigation Reform Act of 1995.

These forward-looking statements are based upon current expectations and assumptions regarding anticipated developments and other factors affecting the Group. They are not historical facts, nor are they guarantees of future performance.

Because these forward-looking statements involve risks and uncertainties, there are important factors that could cause actual results to differ materially from those expressed or implied by these forward-looking statements. Further details of potential risks and uncertainties affecting the Group are described in the Group's filings with the London Stock Exchange, Euronext Amsterdam and the US Securities and Exchange Commission, including the Annual Report & Accounts on Form 20-F. These forward-looking statements speak only as of the date of this presentation.

## Agenda



### Growth through market disruption

- Disruptive brand idea
- Disruptive innovation

## Strong positions in D&E



**Leader in D&E**  
**1.5X bigger than nearest competitor in D&E**

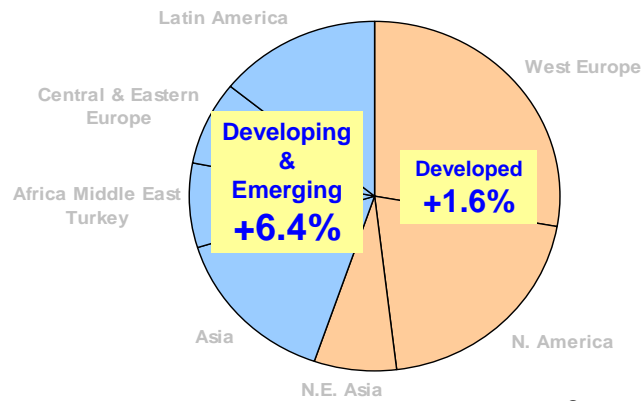


Source: Nielsen, Euromonitor, Unilever estimates

## ... and D&E Fabric Cleaning markets are growing fast



### Split of Global fabric cleaning market size by region



Source: Nielsen, Euromonitor  
Growth: 2 year CAGR

## Competitive dynamics



### Multinational marketers

Global portfolio model, with global brands

### Low price local brands

Good performance at low price

Unilever has the most consumers globally  
to harness for scale

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## The starting point: deep consumer understanding



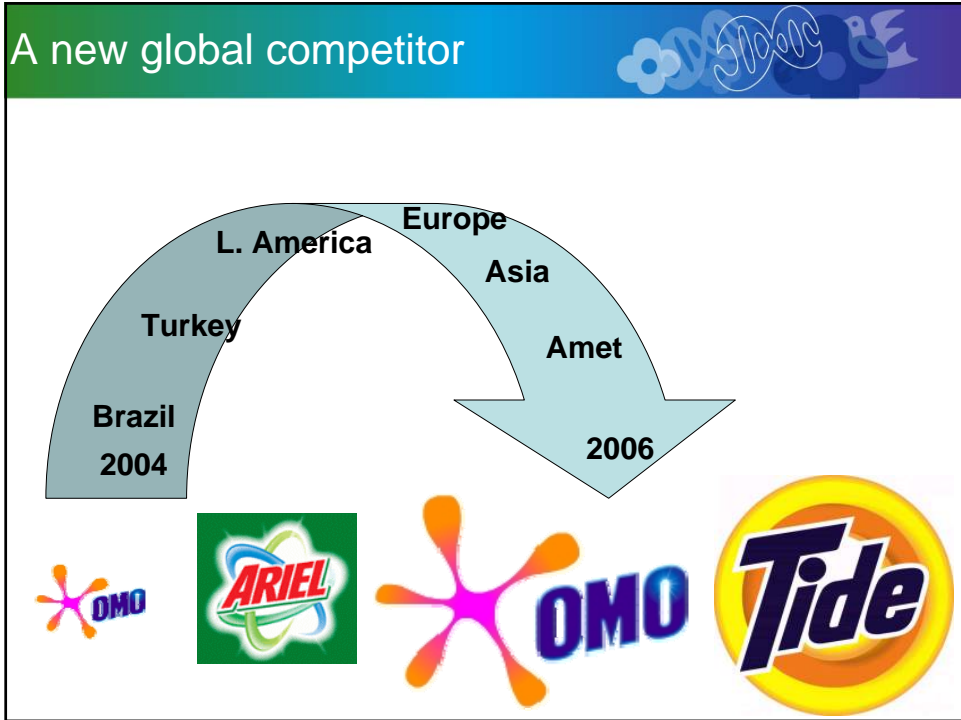
Our target's main worry is to take good care of kids, giving them the best opportunities in life.

Parents recognize that Kids get dirty while “discovering the world”

#### **Consumer Dilemma:**

Letting their kids get dirty vs a basket full of dirty laundry







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## Consumer Trend: Small = Cool



**1990's**  
Big = Better



**2000's**  
Small = Cool



Consumers are going smaller for bigger benefits and richer experiences

Packaging has been a key success in smaller products



## Retailer trends

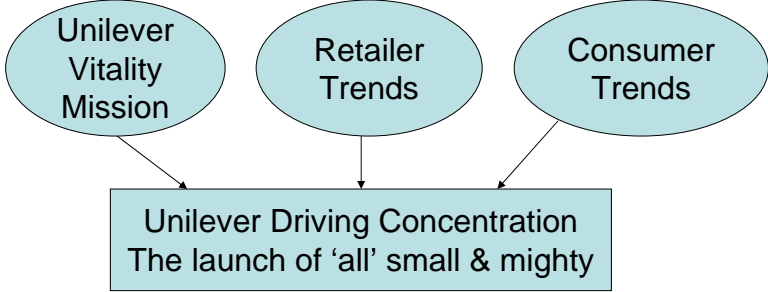
Crowded shelf – need for space

Rising distributions costs

Realizing their impact and responsibility to the environment



# Leading the change in Laundry liquids



# Persil and Surf - UK



## Skip and Omo - France



## Now on shelf



France



UK

## Summary



“Dirt is Good” is a disruptive brand idea creating a global mega-brand

Concentration is a disruptive market leading innovation – enhancing growth and margin

New organisation allows us to build more globally coherent, bigger, better ideas, rolled out fast