



WINNING IN D&E MARKETS

ANNUAL INVESTOR MEET 2013

HARISH MANWANI



AGENDA

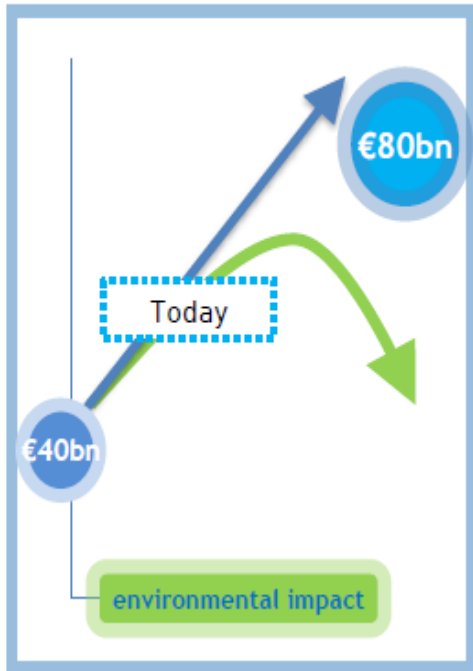


- **Unilever : Becoming 'Fit to Win'**
- **D&E Opportunity**
- **Winning in D&E**

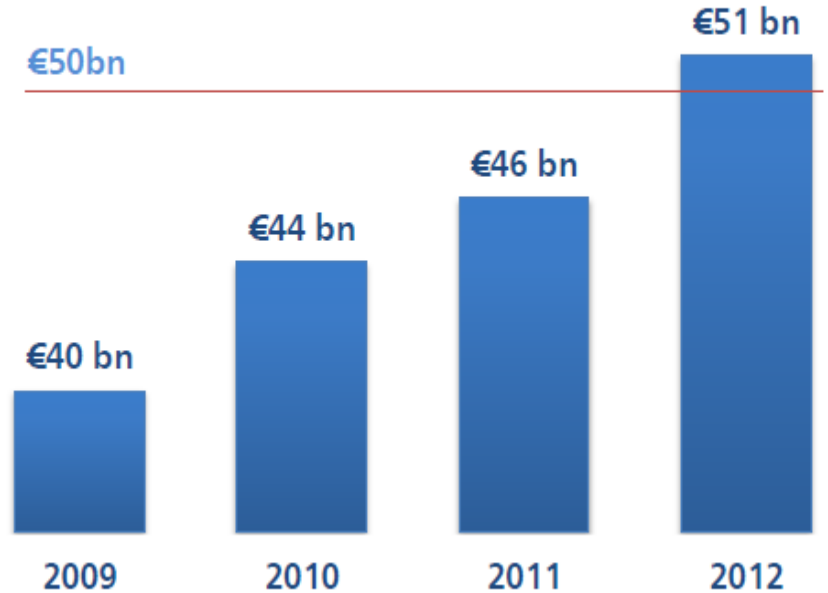
2012: ANOTHER STEP TOWARDS OUR €80 B VISION



An inspiring vision set in 2009



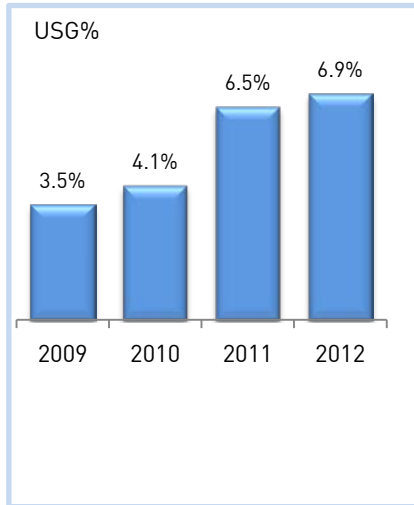
€10bn Turnover increased since 2009



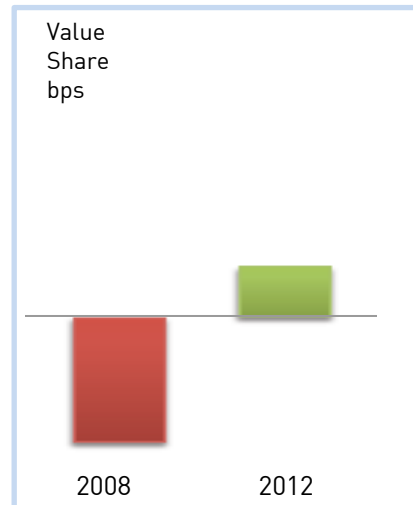
OUR PERFORMANCE HAS BEEN IMPROVING



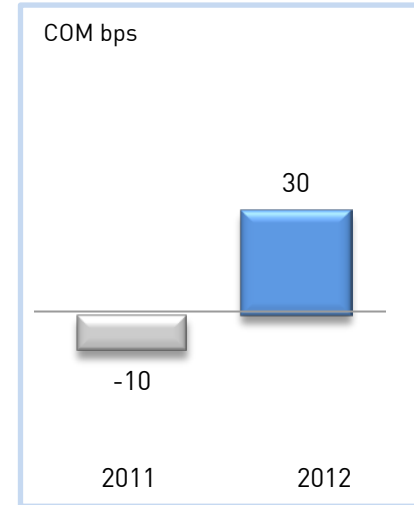
Consistent



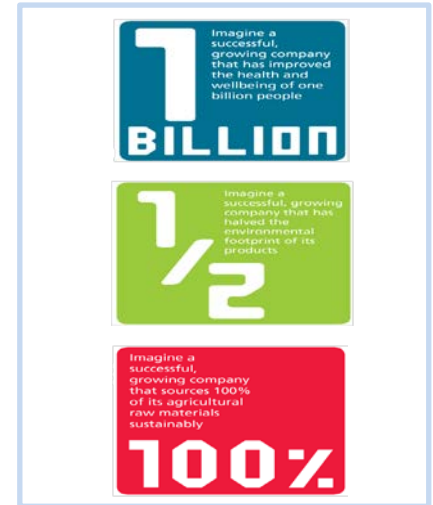
Competitive



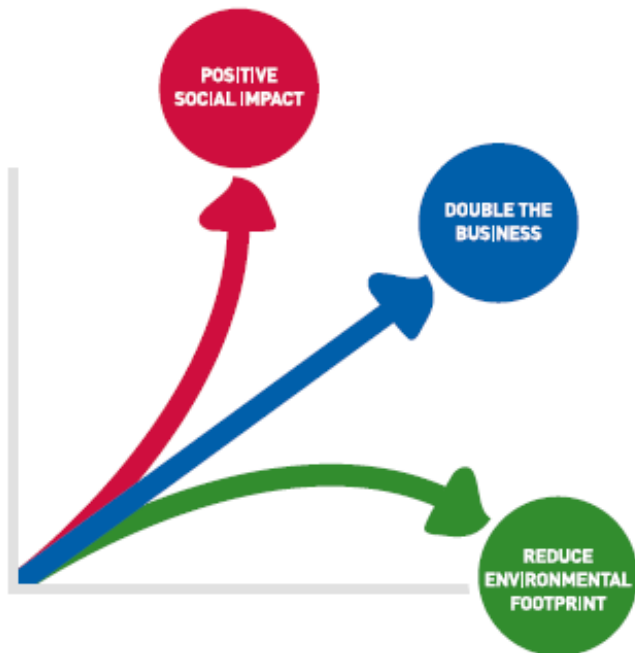
Profitable



Responsible



BECOMING 'FIT TO WIN'



“4G” Plans
Consistent **Growth**
Competitive **Growth**
Profitable **Growth**
Responsible **Growth**

Consistent top and bottom line expansion

OUR STRATEGY IS WORKING



Strong in-market execution



>5 M Perfect Stores

Bigger, better, faster innovations



60 countries in 3 months

Improved product quality



95% win or parity in blind test

BUSINESS UNUSUAL ON COSTS

Savings mitigating inflation

- Global buying
- Value improvement
- Restructuring
- M&A synergies

Containing cost with discipline



USLP IS AN INTEGRAL PART OF THE BUSINESS



Driving Growth



Lifebuoy

Reducing waste & cost



€300m cost avoided in 4 years

Managing Risk

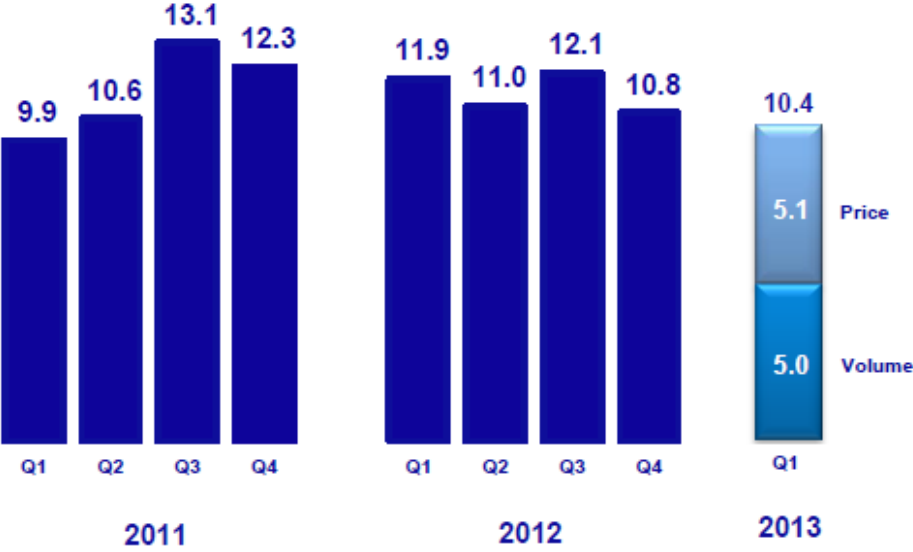


36% of raw materials from sustainable sources

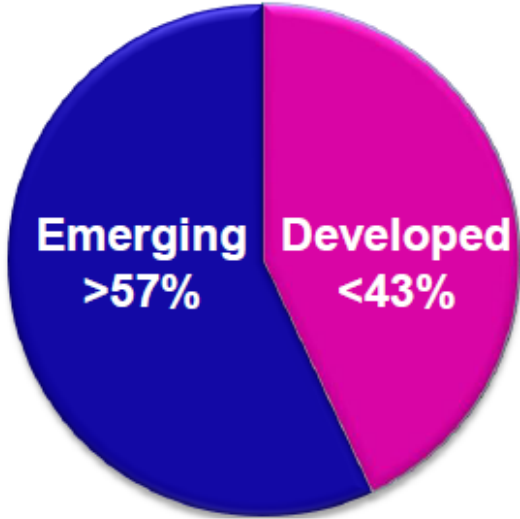
EMERGING MARKETS: KEY DRIVER OF GROWTH



Emerging market USG %



% Unilever Turnover



AGENDA

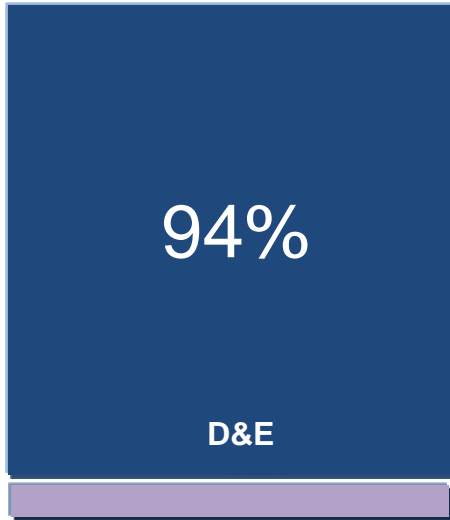


- **Unilever 2012 : Becoming 'Fit to Win'**
- **D&E Opportunity**
- **Winning in D&E**

D&E : BIG OPPORTUNITY

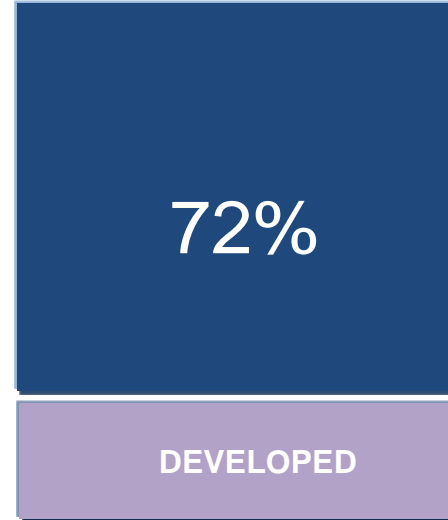


750 million



Share of population growth

\$ 23 Trillion



Share of incremental consumer expenditure

UNILEVER IS STRONGLY POSITIONED

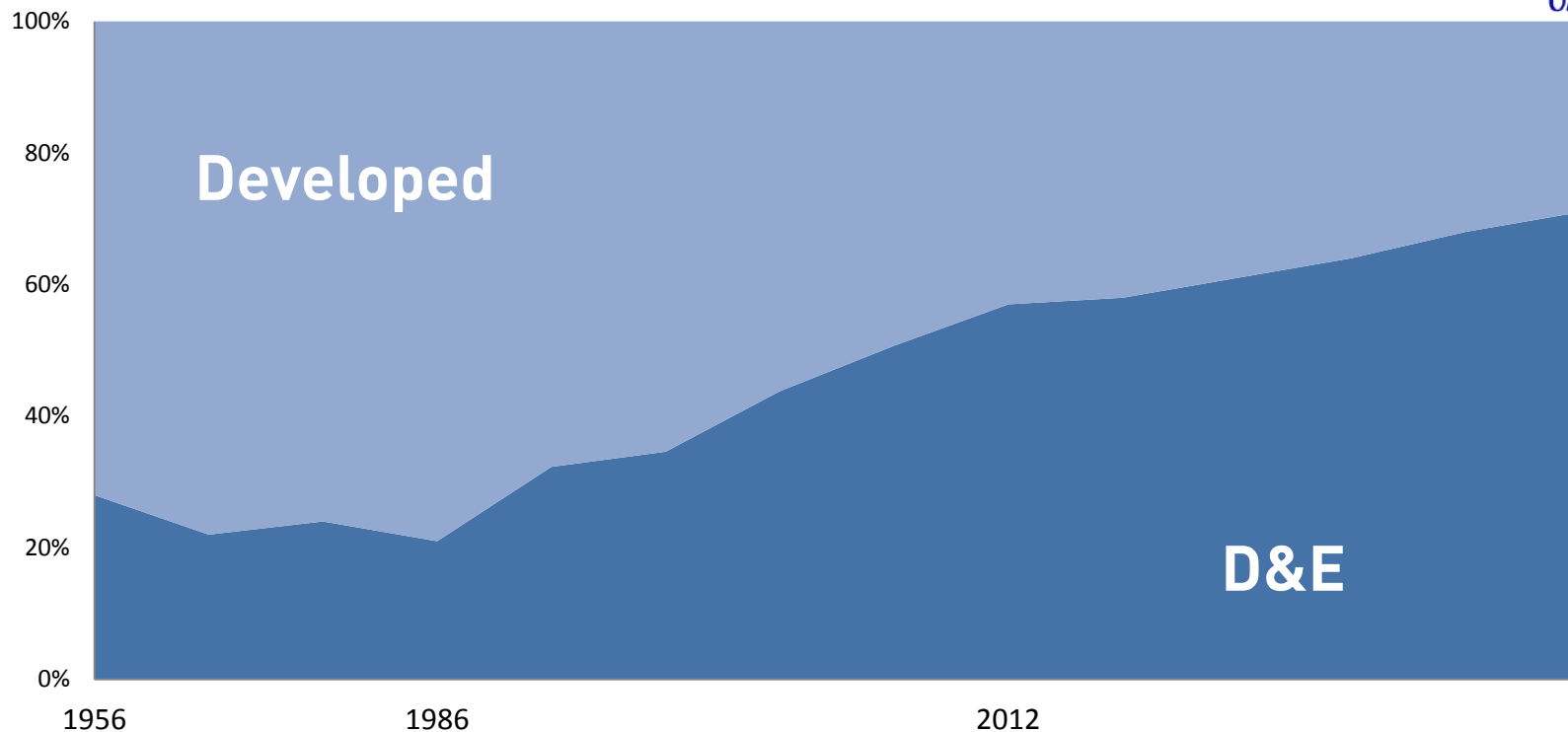
C. 80% OF TURNOVER IS IN LEADING POSITIONS



Market Position

	Hair	Skin Care	Skin Cleansing	Deos	Oral	Laundry	HHC	Spreads	Savoury	Beverages	Ice Cream
BRIC											
	1		1	1	2	1			2	2	1
		2	1	1			1		2	2	1
	1	1	1	1	2	1	1			1	2
	2		2	1					2		
Next 13											
	1	1	1	1	1	2	1	1	1	1	1
	1	1		1	2	2			1		1
	1	1	1	2		1	1		1		1
	1	1	1	2	1	1	1		1		
	1	1	1		1	1	1			2	
	1	1	1			2		1		1	1
					1	1		1	2		
	1	1	1	1		1	1	1	1	2	1
	1		1	1		1	1		1	1	
		1		1				1	1	2	1
	2	1	1	1	1		2			1	
	2			2		1	1	2	1	2	1
				1			1	1	1	1	1

LOOKING AHEAD: 70%+ D&E



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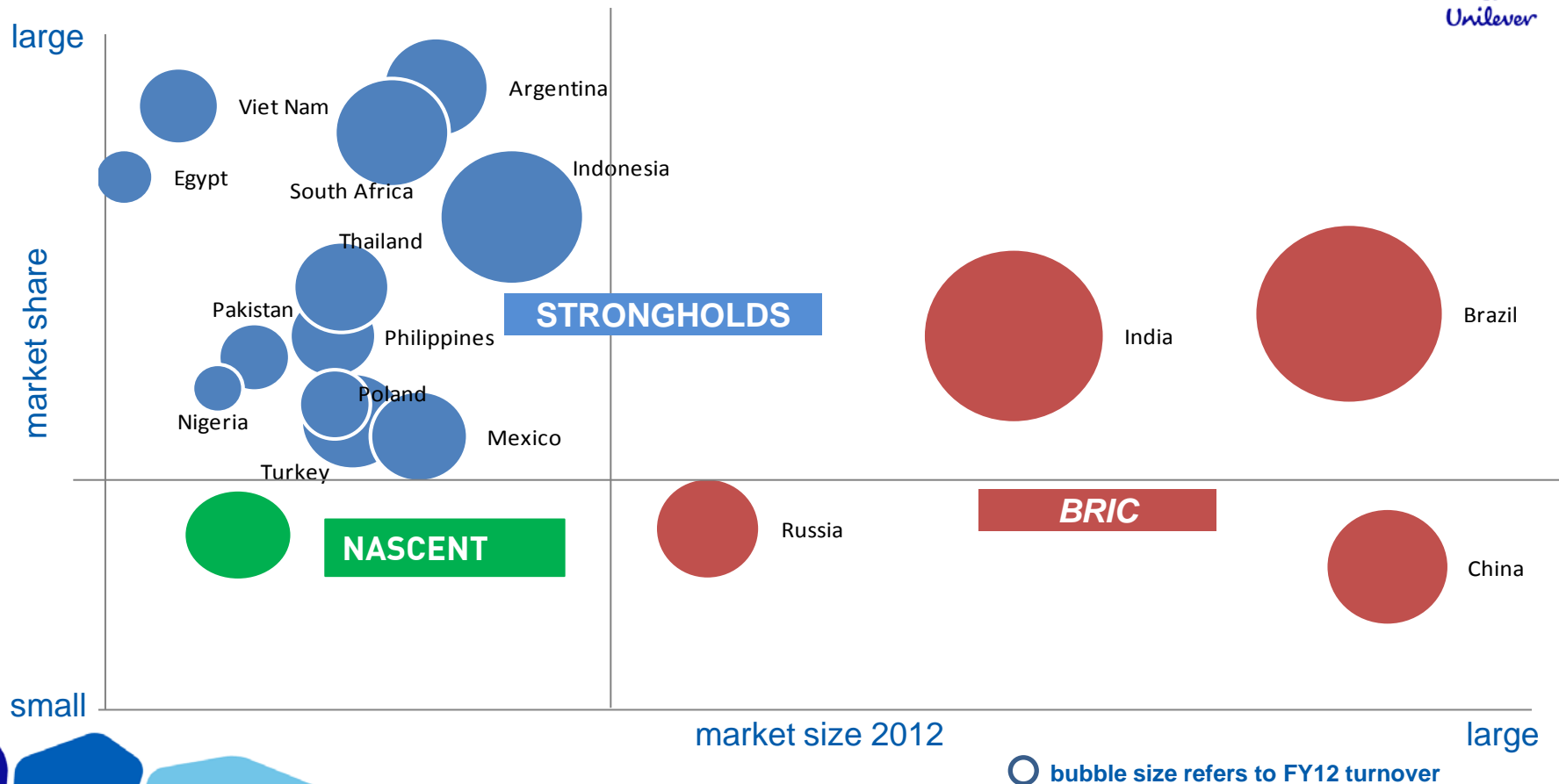
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WINNING IN D&E



1. Focus on Key Markets

UNILEVER IN KEY MARKETS: BRIC + N13



WINNING IN D&E



1. Focus on Key Markets

2. Reach Up and Down and Wide

FOLLOW THE PEOPLE

1.8 BN WILL MOVE UP THE LADDER, MAINLY IN EMERGING MARKETS



Have lots

2010

1.9

2020

3.0



Haves

2.0

2.7



Have nots

2.9

1.9

REACH UP AND DOWN AND WIDE



Reach Up



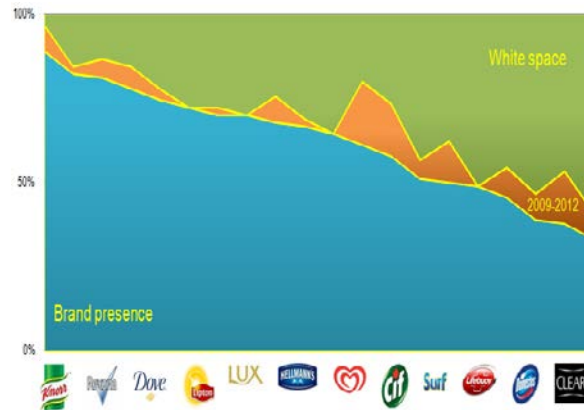
Accelerate Premiumisation

Reach Down



Compete for Non-Users

Reach Wide



Be First and Fast in white spaces

WINNING IN D&E



1. Focus on Key Markets

2. Reach Up and Down and Wide

3. Local relevance and Global leverage

LOCAL RELEVANCE AND GLOBAL LEVERAGE



Dove China



Dove Care with 'Better than Milk'
taking Chinese beauty mythology

Knorr Philippines



Knorr Sinigang with
famous 'local flavours'

Walls India

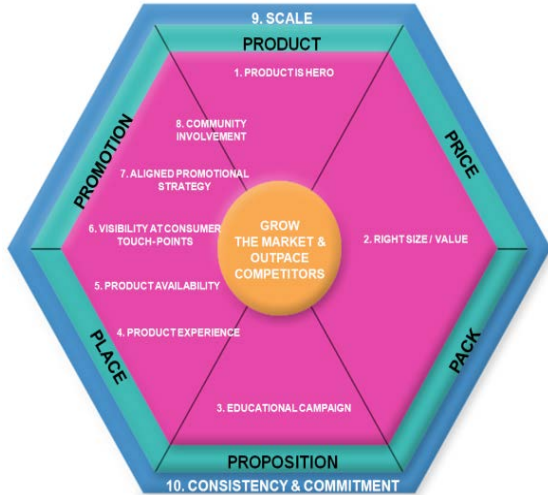


Leveraging Walls with Indian
'local delights'

GLOBAL LEVERAGE: SCALING UP REPEATABLE MODELS



Market Development Deployed Everywhere



Perfect Stores Global roll out in 75 countries



Low Cost Business Model Deployed in Laundry & Ice Cream

End to End
Value Chain



WINNING IN D&E



1. Focus on Key Markets

2. Reach Up and Down and Wide

3. Local relevance and Global leverage

4. Be an Execution Powerhouse: General Trade and Modern Trade

MORE STORES, BETTER STORES, BETTER SERVED

Traditional Trade



Modern Trade



WINNING IN D&E



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5. Exploit Traditional and Digital Media

DIGITAL EXPLOSION



Mobile users
from 1bn (2000) to 7bn (2013)



Internet users
from 350m (2000) to 3bn (2013)



E-commerce



Digital marketing capability

EXPLOITING TRADITIONAL & DIGITAL MEDIA



Traditional



Rural Outreach

Digital



Brand Websites | Social | Mobile

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3. Locally relevant and Globally leveraged

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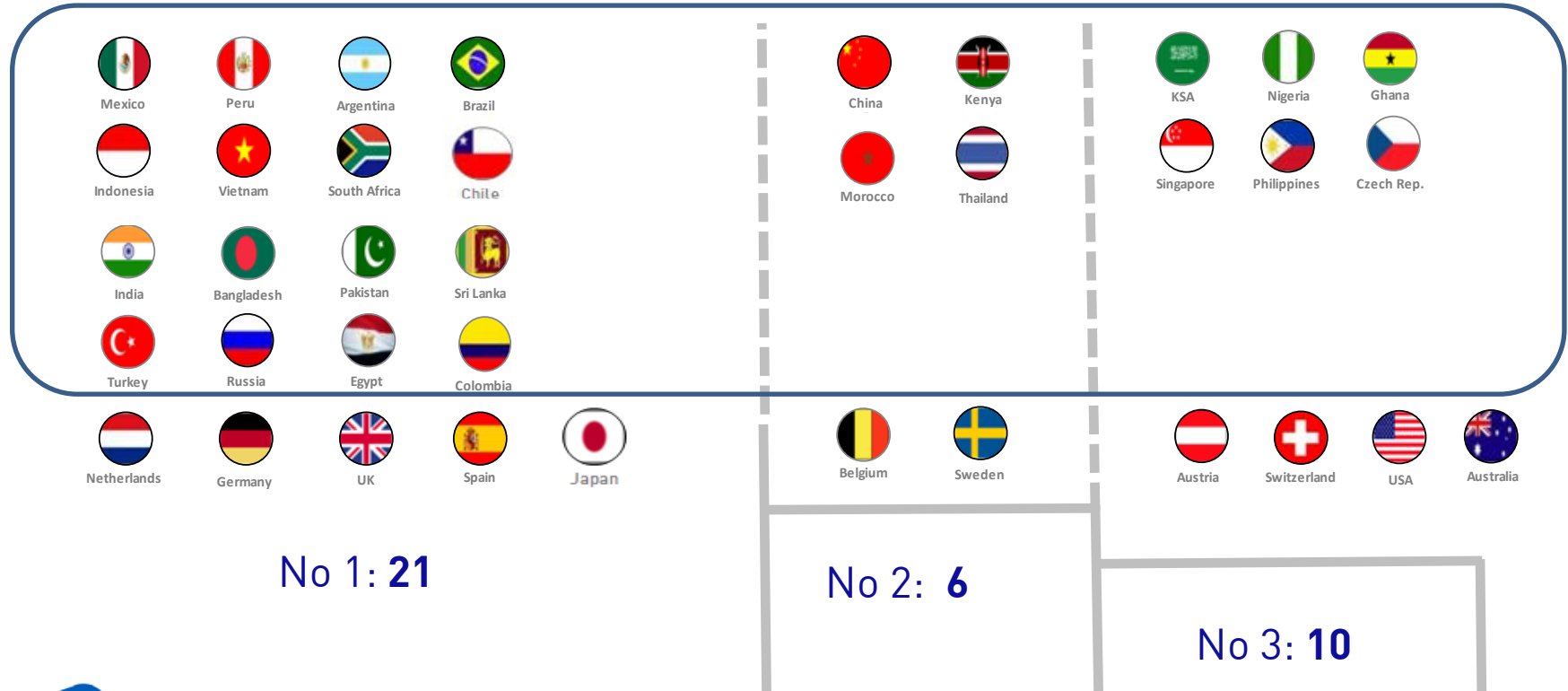
5. Exploit Traditional and Digital Media

6. Win the War on Talent

UNILEVER: EMPLOYER OF CHOICE



Of 37 countries where Unilever is among the Top 3, **26 are in the D&E world**



BUILDING GLOBAL TALENT: 'FOUR ACRES' SINGAPORE



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OWN SUSTAINABILITY

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1
Imagine a successful, growing company that has improved the health and wellbeing of one billion people
BILLION

1/2
Imagine a successful, growing company that has halved the environmental footprint of its products

Imagine a successful, growing company that sources 100% of its agricultural raw materials sustainably
100%



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OWN SUSTAINABILITY



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