



Agenda

Our goals for 2007-10

A unique in-depth knowledge of Asian consumer needs

The booming Hair Care market

Hair care Asia experiences its best growth performance, outpacing organic market growth

Our growth is driven by three key thrusts

Future challenges


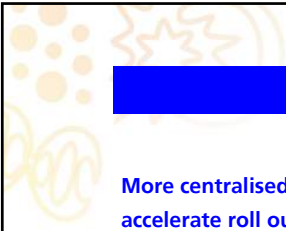
Summary



Our goals for 2007-2010 is superior sustained performance

We will continue to deploy a globally aligned 3-4 brand portfolio able to deliver:

- Double digit turnover growth
- Market share gains
- Continuous margin improvement through better product mix and positive strategic pricing



Key enablers



More centralised portfolio and brand management, to reduce risk and accelerate roll outs

Sharper investment choices

Full brand portfolio deployment, with regional adjustments

Focus on innovation as THE key growth driver

- Better products through deployment of best-in-class technology
- A shift to more premium offerings, less reliance on price discounts



A unique in-depth knowledge of Asian consumer needs forms the base of superior sustained category performance



A deep knowledge of very diverse habits



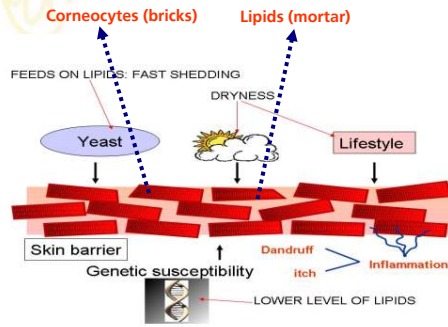
	India	China	Philippines	Japan
Pre wash habit	Oiling			
Shampoo usage days	1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20	1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20	1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20	1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20
Conditioner usage days		1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20	1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20	1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20
Styling days		1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20	1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20	1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20
Preferred packs	Sachets	Bottles	Sachets	Bottles
Wash Water	Buckets	Tubs	Buckets	Shower

Ethnicity defines hair fibre condition and quality



	India	China	Japan
	 D > 70 microns	 D > 80 microns	 D > 90 microns
Diameter	Medium	High	Highest
Shape	Elliptical	Round/ Elliptical	Round
Texture	Soft	Medium	Coarse
Color	dark	darker	Very dark
Length	Very long	Long	Medium short

Factors that influence the scalp condition



Parameter	China	UK Chinese
Sebum	Higher	Lower
Type of dandruff	Greasy	Dry
Histamine response	High	Positive for dandruff
Ceramides	Uniform	Low in dandruff
Measure of lipids	Higher	Lower
Scalp biomarkers	Higher	Lower

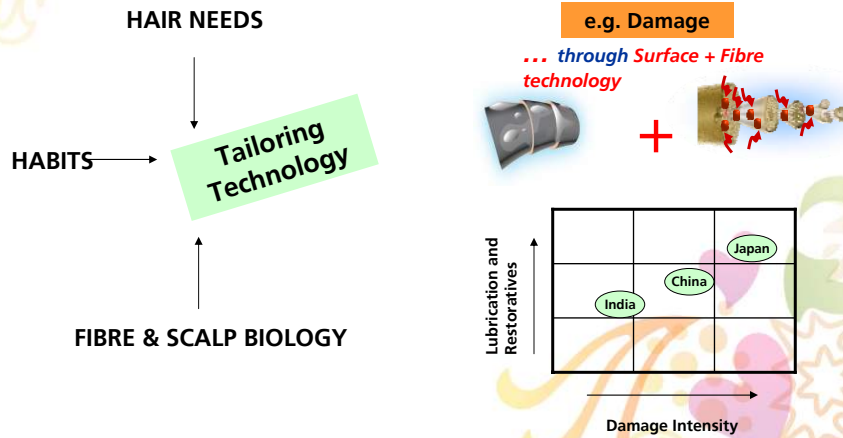
Environment, diet, play a significant role

A diversity in top consumer hair needs



	India	China	Japan
Hair Fall	1	2	4
Damage	2	3	1
Longer/ Strong	3	5	3
Dandruff	4	1	5
Shine	5	4	2

Sharply tailoring leading technology building blocks



The Hair Care market is booming



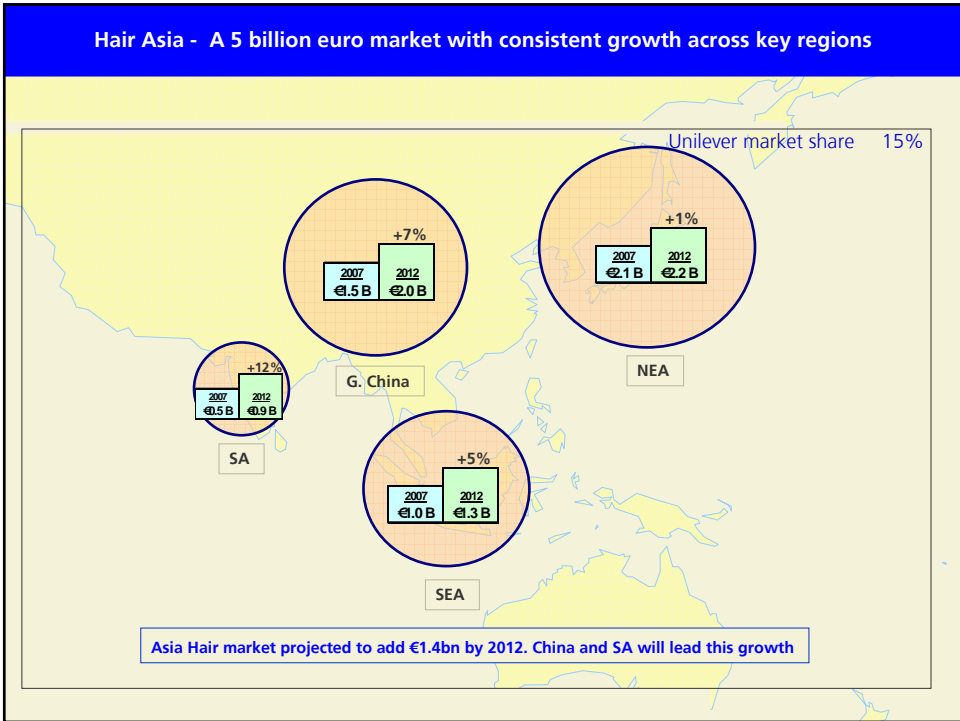
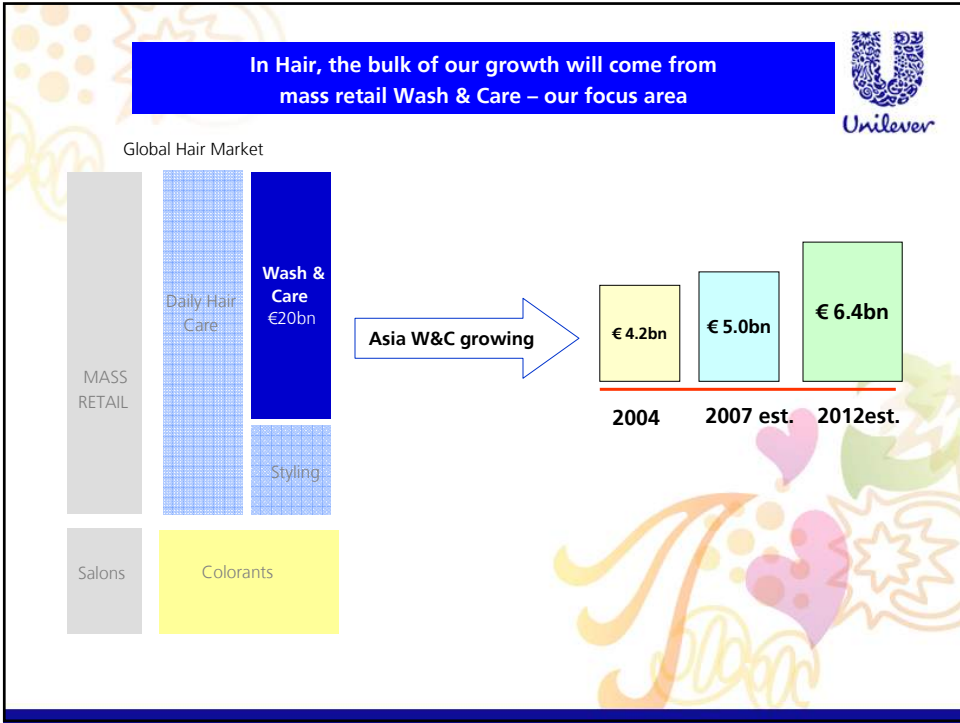
- 4 billion population, with increasing income, extended lifespan and with a dominant proportion of long hair
- Hair care is an integral part of the Asian 'beauty care' offering & fashion explosion

"Hair is like my handbag" – Consumer Quote

(Video)

This fuels an 'explosion' of more sophisticated & premium beauty
Hair Care regime & rituals, continuously growing the market

- Shampoo penetration in on a steady increase in China, India & Indonesia
- Additionally, the usership of post-shampoo ranges is fast-increasing across Asia





Hair care Asia experiences its best growth performance, outpacing organic market growth

- 1) Growing double digit ahead of market & growing shares
- 2) Getting stronger where we lead historically, and leading the innovation initiative in China



Hair care Asia experiences its best growth performance, Outpacing Organic Market Growth



Unilever Hair Asia growing ahead of market growth

Sunsilk, Lux and Clear, our 3 biggest brands drive turnover growth
Most other brands also contribute

Growth is driven by China, SA and SEA clusters

Sep '07 Cum. growth	UL topline	Market
NEA cluster	Low single digit (decline)	Low single digit
China group	Double digit +	Double digit
SEA & SA cluster	Double digit	Mid single digit

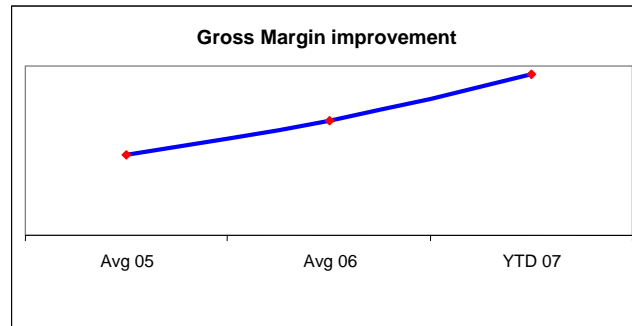


Hair care Asia experiences its best growth performance Improving margins



Hair is amongst the most profitable categories for Unilever Asia
The topline drive is coupled with improvement to gross margins

A combination of premium and innovative mixes, right strategic pricing and cost effectiveness have further improved gross margins



Our Growth is driven by 3 Key Thrusts



1) A more complete 3-4 brand portfolio of globally aligned, bigger brands, in each country

2) That fully taps the full Market Pyramid Potential by meeting:

- Key consumer segment needs
- Key market pricing points (from low LSM to High LSM)
- Key country 'stage of development' opportunities

3) Supported by leading technology and fewer, bolder initiatives

A more complete 3-4 brand portfolio of globally aligned, bigger brands in each country

Urban

CLEAR A DUAL GENDER AD EXPERT

Dove A PREMIUM CARE & DAMAGE REPAIR EXPERT

Urban/Rural

SERRA A LARGE, FEMALE, BEAUTY CORNERSTONE BRAND

Rural

Clinic Plus A FAMILY VALUE & HEALTH FOUNDATION BRAND

HEALTHY

NEW REVOLUTIONARY CLINIC ALL CLEAR
REMOVES DANDRUFF AND PREVENTS IT
FROM COMING BACK.

CLINIC ALL
CLEAR

NO DANDRUFF.*

*Visible flakes with regular use

New Dove Haircare

Zero Damage beautiful hair

WATERY SHINE BY LUX

LUX

髪に、うるんだ輝きを。ラックス

新ラックス スーパーリッチシャイン。ヒアルロン酸EX*配合。

*ヒアルロン酸、モイスチャーアミノ酸配合(保湿効果)

Win the beauty game with superior '7days damage repair'

7日後までに、「切れ毛」を減らしたいあなたに。



髪が戻った、120種類のアミノ酸をあなたの髪にも。

LUX
スーパーダメージリペア

200%輝くあなたに。



LUX
スーパーリッチシャイン



A woman with long dark hair and a young girl in a green soccer uniform are shown against a blue sky with white clouds. The girl is holding a soccer ball and has her hair blowing in the wind. The text 'THICK, HEALTHY HAIR. YOUR MARK OF VICTORY.' is written in white. A large white cross shape contains a bottle of LUX Clinic Plus shampoo. Below the cross is a small circular graphic with the text 'MicroGly Clean' and 'Multi-Protein Growth'.

THICK, HEALTHY HAIR.
YOUR MARK OF VICTORY.



夏士莲 HAZELINE 健康秀发 自然滋养

我,在夏士莲发现了自然滋养力。

宋慧乔 亚洲巨星

全新升级上市
自然的滋养,秀发神采飞扬

A Brand Portfolio that fully taps the full market pyramid potential
Key country 'stage of development' opportunities

Unilever

INDIA
Shampoo + Conditioner

INDONESIA
Shampoo + Conditioner + Mask

CHINA
Shampoo + Conditioner + Mask + Leave On

JAPAN
Shampoo + Conditioner + Rinse Off TMT + Leave On TMT

Supported by leading technology and fewer, bolder initiatives



Lux Hair China



Lux Hair Japan



Dove Hair India



Clear Philippines

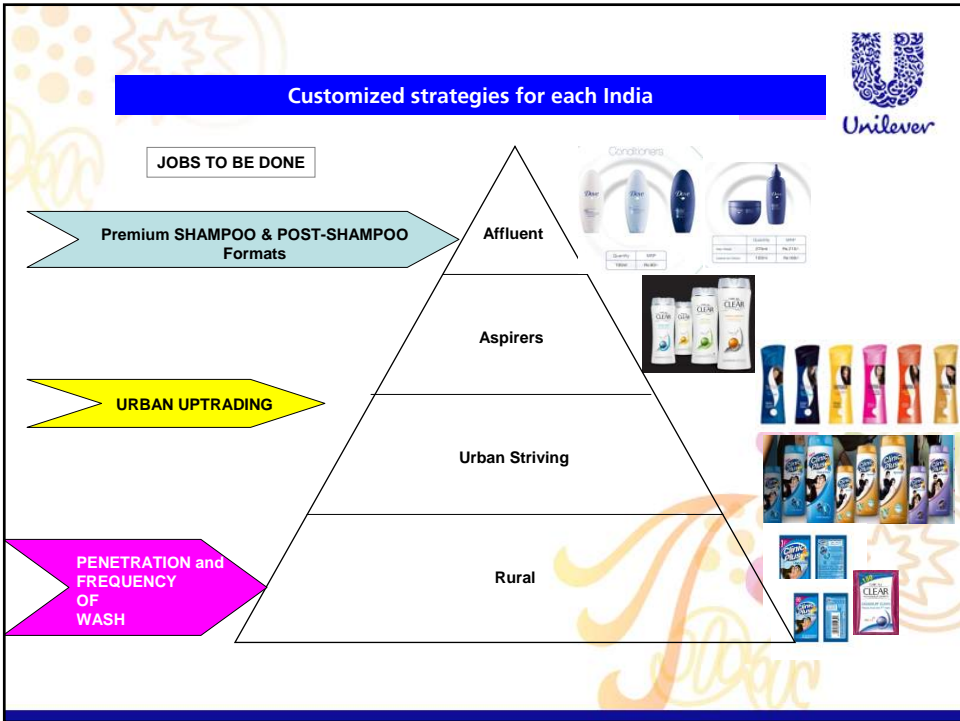
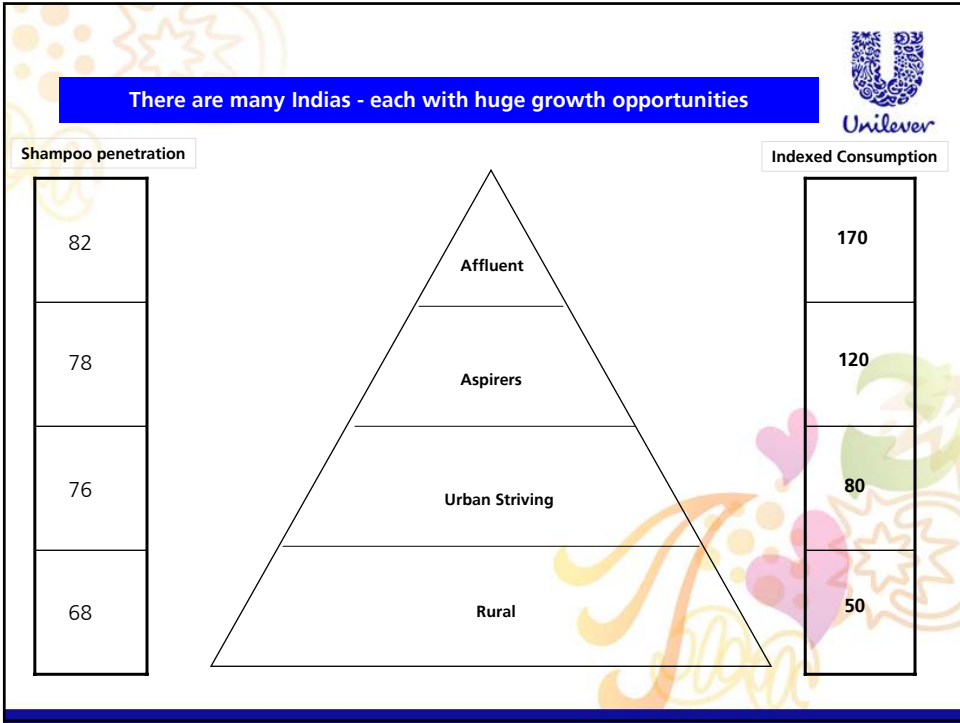
Our Key Challenges

India




Exploiting a rapidly expanding urban market (Dove Hair) whilst driving penetration & consumption in rural areas (Clinic), in a market growing by 15%p.a.



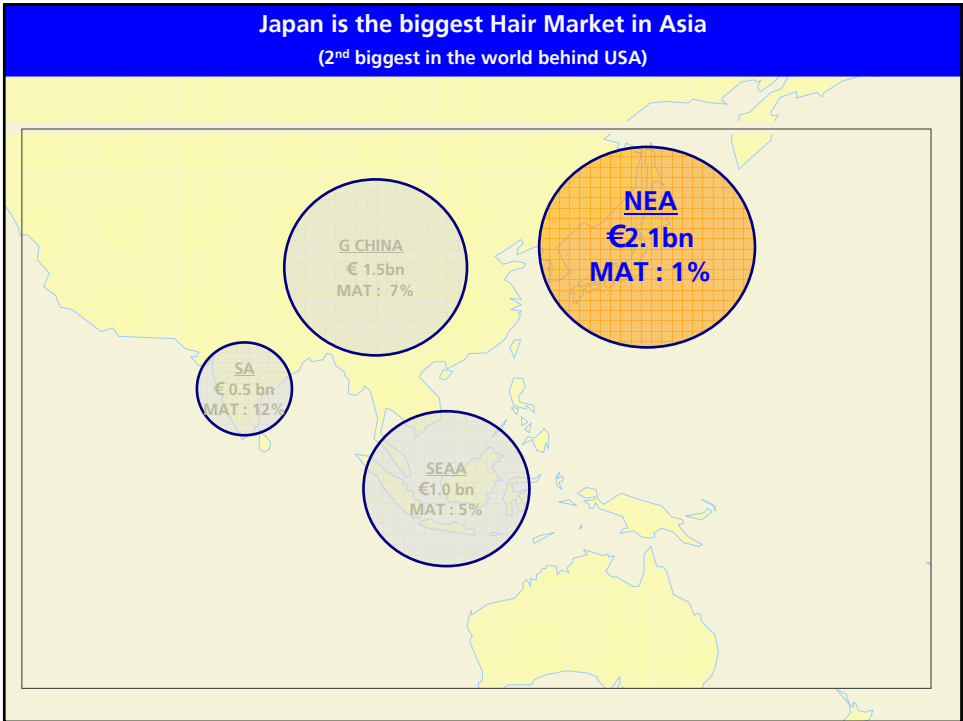


Our Key Challenges


Japan



Growing market share, lead by Lux Hair, to create superior value & provide valuable innovation learning's for other markets in Asia



Japanese woman's hair regime...the most sophisticated in the world



Wash Frequency

In a week

	1	2	3	4	5	6	7
Wash							
Shampoo							
H. Con							

When

Evening, before bed time

93%

Body

With body wash

60%

Drying

Use hair dryer


66%

Post Wash

60% use Styling products (Mousse, Wax, Spray)


Colouring

70% coloured hair in last year




Japanese Bathroom

A vicious cycle of damage



- 365 washes
- 35 hours under the blow-drier
- 55 styling irons sessions
- 6 razor cuts
- 5 straightening perms
- 8 colour treatments
- 1,000 hours in air-con environment



Virgin hair

Combing
Brushing

Blow dryer

Styling Iron

Bleach / Colouring (70%)
Perm (33%)

Severely Damaged Hair

Lux Hair architecture fully leverages the key drivers of the market



Daily Damage Care
Enhance Shine



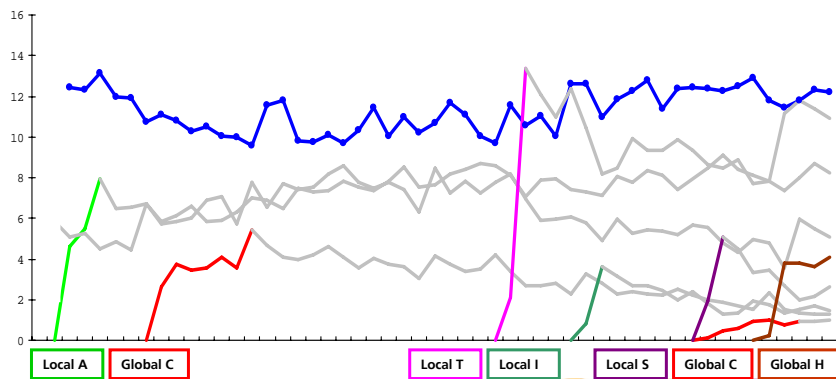
Severe Damage Care
Restore Shine




Sustaining a strong leadership vs. persistent aggressive attacks




"...there are many new seductive offers that come up...but in the end we always go back to Lux." (consumer blog entry)






Lux stays ahead with exciting innovations



LUX Super Rich
美髪シリーズ



LUX Jeweled
シリーズ

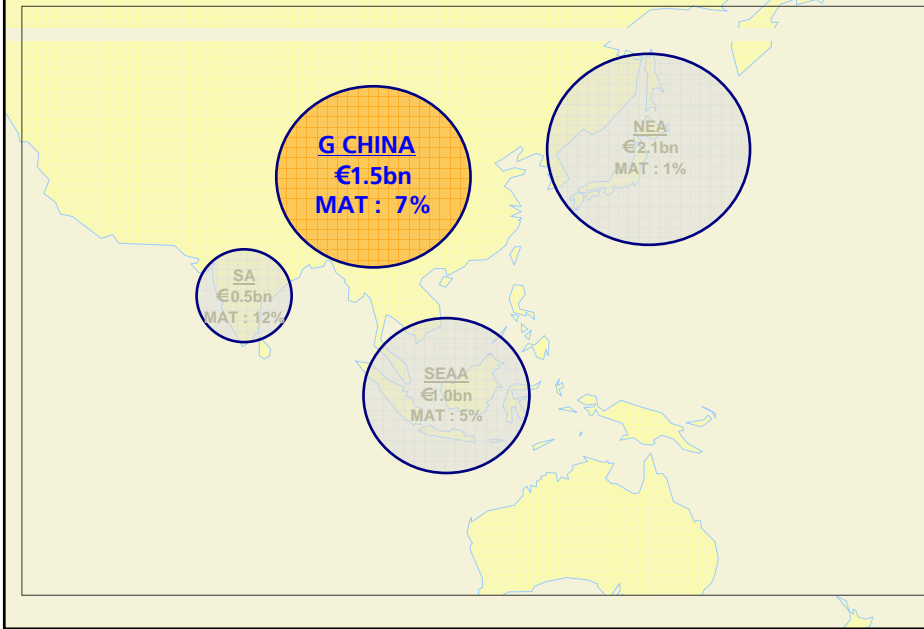


Our Key Challenges

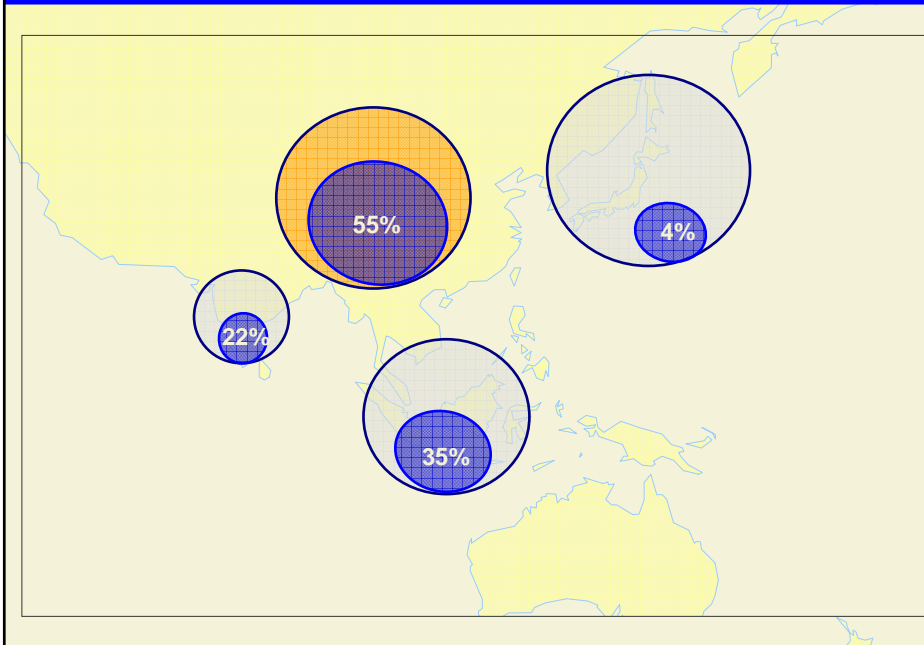
China

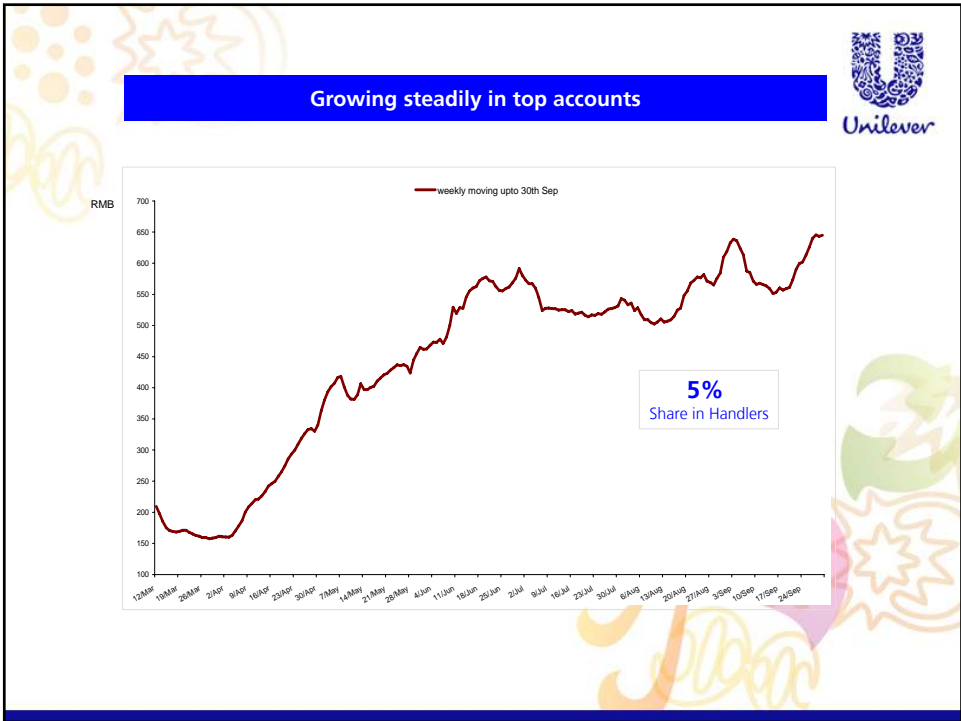

A challenger mindset with the launch of a new Clear Anti-Dandruff mix


By 2010, the China hair market will be as big as Japan



The AD segment is biggest in China – nearly a 1 Billion Euro opportunity







In Summary

Hair is an attractive business, leading value creation for UL Asia

Unilever is a strong global player with a growth track record

Clear and Lux expansion are examples of what's different now

- Full 3-4 brand portfolio deployment
- Strategic pricing –full market piano
- Bolder innovation
- Better products. More premium propositions.
- Supported by best available technology.
- Faster roll outs



Unilever Asia Hair Care

A Regionalized Global Strategy that drives & outpaces Market Growth & builds Margins

