HOME CARE

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President Home Care

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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 in the Unilever Annual Report and Accounts 2021.
We have a proven model for competitive growth: Multi-year category development and ‘Clean Future’

E2E Home Care organization unlocks new sources of margin expansion

We have a plan towards NetZero and Plastic Free
Agenda

1. Market & Business Group Overview
2. Strategy
3. Execution through the new Home Care organization
4. Unilever Home Care value creation
Unilever Home Care – Business Group overview

€10.6
FY'21 Turnover (€bn)

4.8%
CAGR '19-21

3 Core Categories
- Home & Hygiene
- Fabric Cleaning
- Fabric Enhancer

5 Core Brands
- OMO
- Surf
- Radiant
- Comfort
- Sunlight

Geographies
- N. Asia
- METU
- Europe
- LATAM
- N. America
- S. Asia
- SEA
- Others
- Africa

Core Brands

5 Core Categories

Persil

Comfort

Cif
A GLOBAL BRAND POWERHOUSE

from €0.4 billion to €4 billion
Global number 2 in value, by far the leader in units sold and EM

#2 in Value Share

Unilever

#1

12%

#3

7%

53%

Other

Source: Euromonitor

#1 in Units Sold

Unilever

#2

23%

#1

20%

#3

10%

68%

Others

Source: Kantar

#1 in 62% of business

Unilever #1

62%

#2

24%

14%

Other

Clear #1 in EM

Source: Euromonitor
Home Care market momentum continues

Consistent Market Growth
+5% CAGR

Market Growth led by EM
+6% CAGR

Source: Euromonitor RSV in € fixed rate
Huge penetration headroom for growth

Fabric Cleaning Liquids Pen %

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Fabric Conditioners Pen %

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Source: Kantar / Europanel Q3 2022 MAT
Unilever Home Care, outperforming the industry

Doubled Turnover

Consistent Profit Improvement

Global Share Gain +200bps

Value Share

Global Share Gain

Fabric Care
H&H
Other

UOM 2015 - E2022

YTD 2022: +56bps

€5bn

€10.6bn

x2

+40bps p.a.
Navigating well through high cost inflation

Advantaged for pricing (high EM, strong brand power)

High inflation & Recession Playbook

✓ Double down on category development
✓ Net Revenue Management (pack-price-channel)
✓ Home Care trampoline (good-better-best portfolio)
✓ Turbo-charge savings (overheads, procurement)
Looking ahead
Enduring trends shape our strategic choices

Consumers will prefer and pay a premium for convenience

Channel development will broaden the repertoire

Shift to Bioscience will disrupt the industry

Sustainability increasingly drives consumer preference
Home Care Business Model

CLEAN FUTURE INNOVATION

LEAD CATEGORY DEVELOPMENT

E2E HOME CARE ORGANIZATION

COST EXTRACTION & OPERATIONAL EXCELLENCE

HOME CARE
An increasing consumer opportunity

Say/Do gap is a market opportunity

Performance + Sustainability is market gap

- 45% Try to purchase sustainably
- 4% Regularly purchase sustainably

- 12% Actives
- 70% Considerers
- 6% Dismissers

- 85% Actives
- 73% Considerers
- 6% Dismissers

PERFORMANCE BRANDS
Trade off performance FOR planet

VALUE BRANDS
Trade off planet AND performance

ECO BRANDS
Trade off performance FOR planet
Performance + Sustainability + Value is a winning model

Superior
- Holistic performance
- Winning retail experience
- Winning communication

Great Value
- Concentration
- Dematerialization
- Bioscience

Sustainable
- Plastic Free
- Net Zero
- Biodegradable

Performance + Sustainability + Value is a winning model
Enabled by patented Science & Technology

- New BIOSCIENCE materials
- SUPERIOR FRAGRANCES
- MICROBIAL CONTROL
- Next Gen CONCENTRATION

Patents
Higher Investment
Partner Ecosystem
Mới 100% thành phần làm sạch gốc thực vật mềm dịu với da tay
NEW SKIP
UNBEATABLE CLEAN
IN SHORT AND COLD CYCLES
NO PLASTIC PACKAGING
Home Care Business Model

CLEAN FUTURE
INNOVATION

LEAD CATEGORY
DEVELOPMENT

HOME CARE

E2E
HOME CARE
ORGANIZATION

COST EXTRACTION
& OPERATIONAL
EXCELLENCE
Multi-year Category Development

More Premium Laundry Formats

- More value per use
- Convenience
- Performance

More Premium Dish Wash Formats

- More value per use
- Convenience
- Performance
Driving competitive growth

**China Portfolio Transformation**

- **2011**
  - Capsules
  - Liquids
  - Powders
  - Bars

- **2021**
  - Capsules
  - Liquids
  - Powders
  - Bars

**China Value Creation**

- **2006**
- **£2022**

Turnover

$x4$
Driving competitive growth and profit
Driving channel evolution and stepping up customer execution

Winning through evolving channels

- GT
- MT
- D-COM

Improving customer engagement, more to come

Source: AGS
Home Care Business Model

CLEAN FUTURE INNOVATION

LEAD CATEGORY DEVELOPMENT

E2E HOME CARE ORGANIZATION

HOME CARE

COST EXTRACTION & OPERATIONAL EXCELLENCE
New HC organization allows new sources of margin expansion

**Cost & Complexity Reduction**
- Exit loss making businesses (3-5% of turnover)
- 30% Chassis, packaging reduction
- 20-40% SKU reduction

**E2E Network Transformation**
- Fewer sourcing units
- 35% more volume/site
- Optimised logistics network (direct dispatch)

**Asset Utilisation & Operational Efficiency**
- Factory Automation
- Autonomous planning
- 15% higher return on asset

**Material Sourcing**
- Bioscience partnerships
- Localised spending
- Vertical integration
Home Care Business Model

CLEAN FUTURE INNOVATION

LEAD CATEGORY DEVELOPMENT

E2E HOME CARE ORGANIZATION

COST EXTRACTION & OPERATIONAL EXCELLENCE
Unilever Home Care Leadership

✓ Spiky talent profiles
✓ Reward aligned to P&L delivery
✓ Culture fitting business model
  ▪ Care is in our name
  ▪ Performance (not hope) in a bottle
  ▪ Every penny counts
  ▪ We are No2, we try harder
Home Care Value Creation will continue

Consistent growth ahead of the market

Margin expansion ahead of Unilever

De-risk environmental impact (Carbon, Plastic)

Enabled by the new Home Care organization