



Unilever

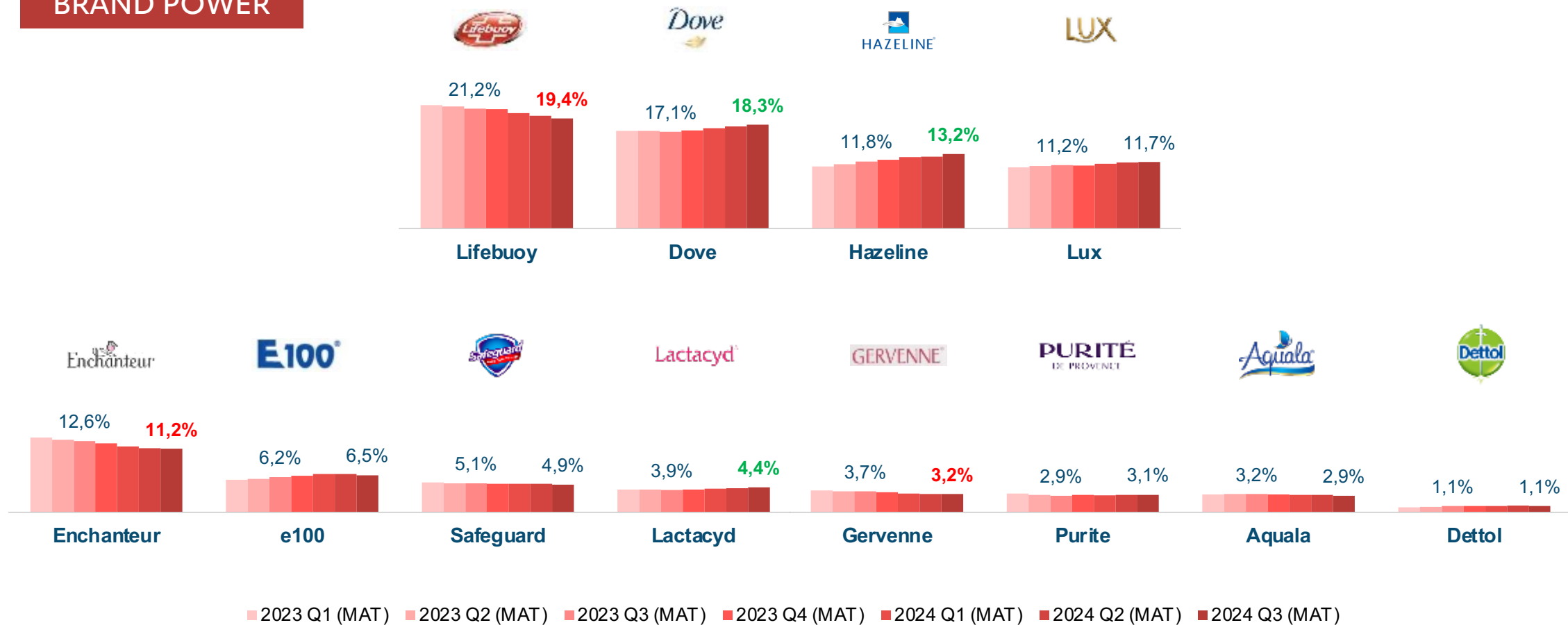
PERSONAL
CARE

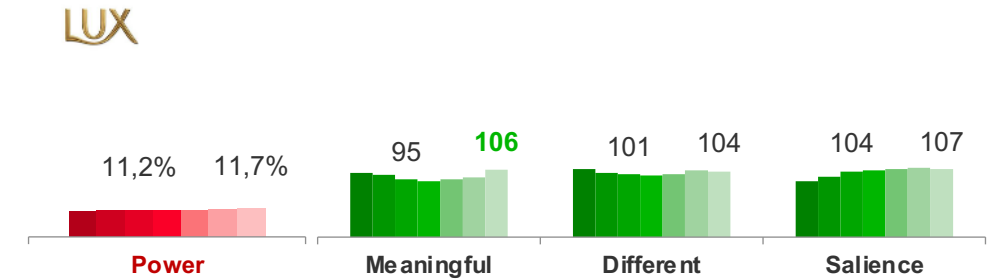
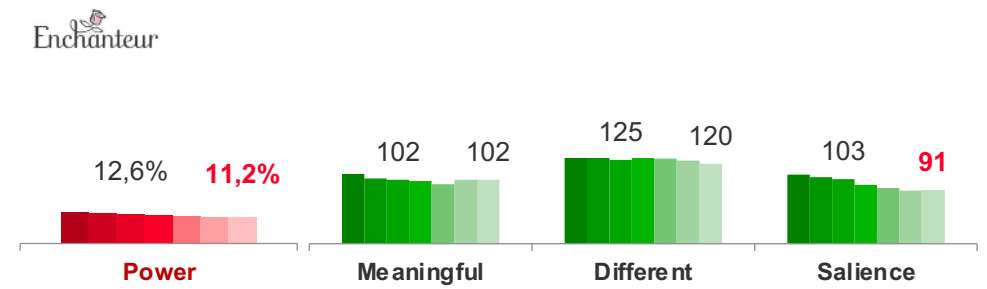
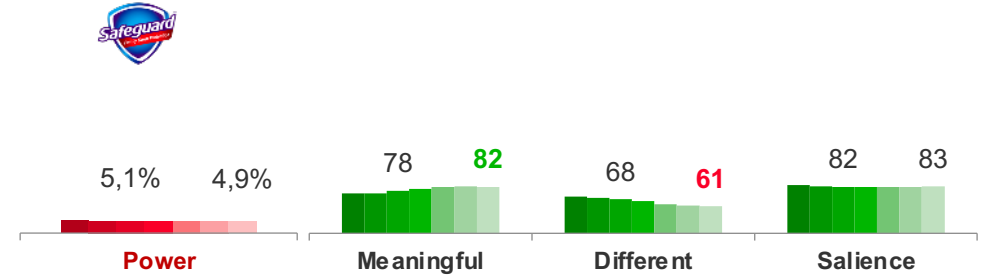
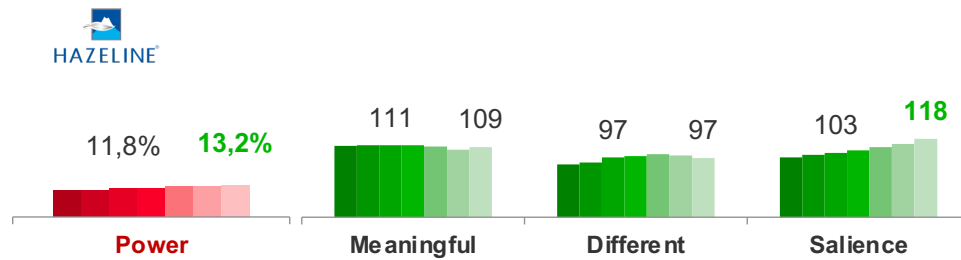
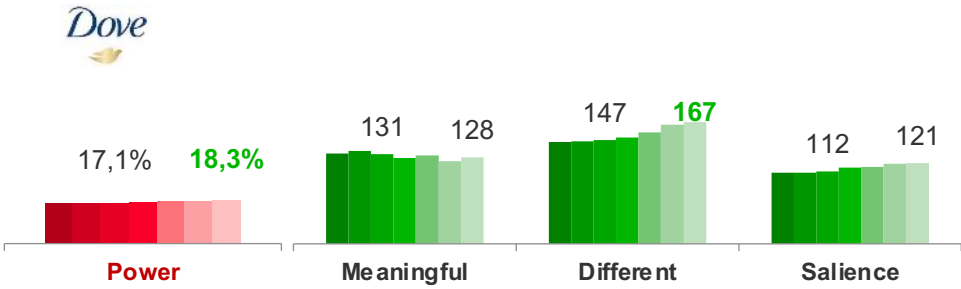
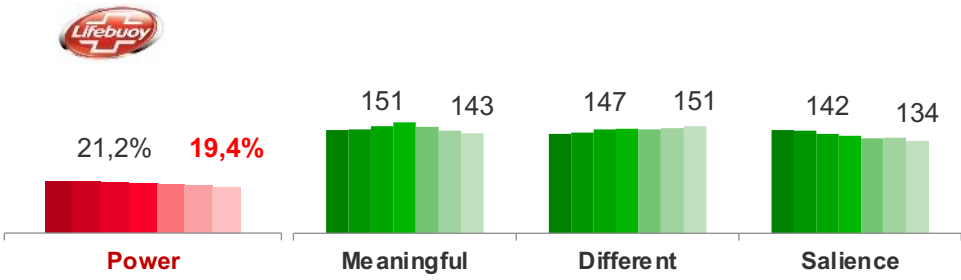
LIFEBUOY

SKIN CLEANSING



BRAND POWER

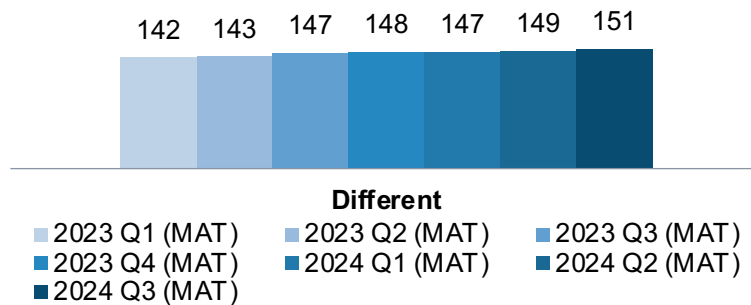
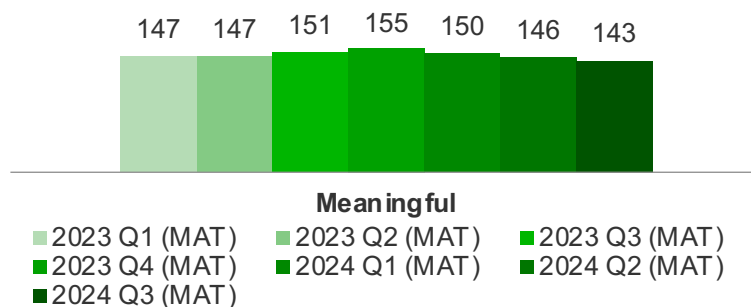
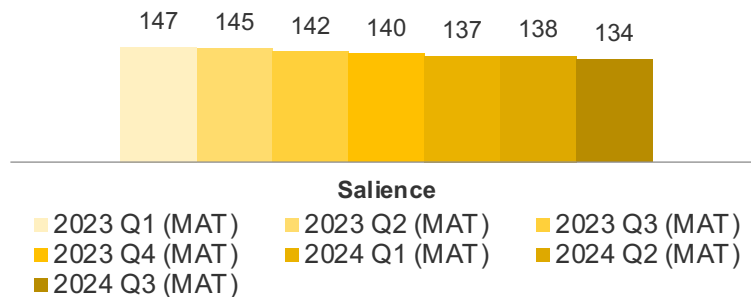




■ 2023 Q1 (MAT) ■ 2023 Q2 (MAT) ■ 2023 Q3 (MAT) ■ 2023 Q4 (MAT) ■ 2024 Q1 (MAT) ■ 2024 Q2 (MAT) ■ 2024 Q3 (MAT)

■ 2023 Q1 (MAT) ■ 2023 Q2 (MAT) ■ 2023 Q3 (MAT) ■ 2023 Q4 (MAT) ■ 2024 Q1 (MAT) ■ 2024 Q2 (MAT) ■ 2024 Q3 (MAT)

[xx/xx] Significant higher/lower vs MAT Q3'23 at 95%



(quarterly)	Q2'22	Q3'22	Q4'22	Q1'23	Q2'23	Q3'23	Q4'23	Q1'24	Q2'24	Q3'24
TOM	31	33	32	34	31	32	32	28	29	28
SPONT	86	85	86	86	86	85	91	86	86	89

(quarterly)	Q2'22	Q3'22	Q4'22	Q1'23	Q2'23	Q3'23	Q4'23	Q1'24	Q2'24	Q3'24
Affinity MS	3.5	3.49	3.4	3.4	3.5	3.57	3.76	3.69	3.71	3.72
Meet Needs MS	8.08	8.03	8.00	7.98	8.02	8.13	8.22	8.32	8.22	8.31

(quarterly)	Q2'22	Q3'22	Q4'22	Q1'23	Q2'23	Q3'23	Q4'23	Q1'24	Q2'24	Q3'24
Unique MS	7.77	7.83	7.67	7.67	7.69	7.80	7.84	8.00	7.91	8.04
Dynamic MS	7.86	7.88	7.70	7.76	7.81	7.95	7.93	8.17	8.02	8.07

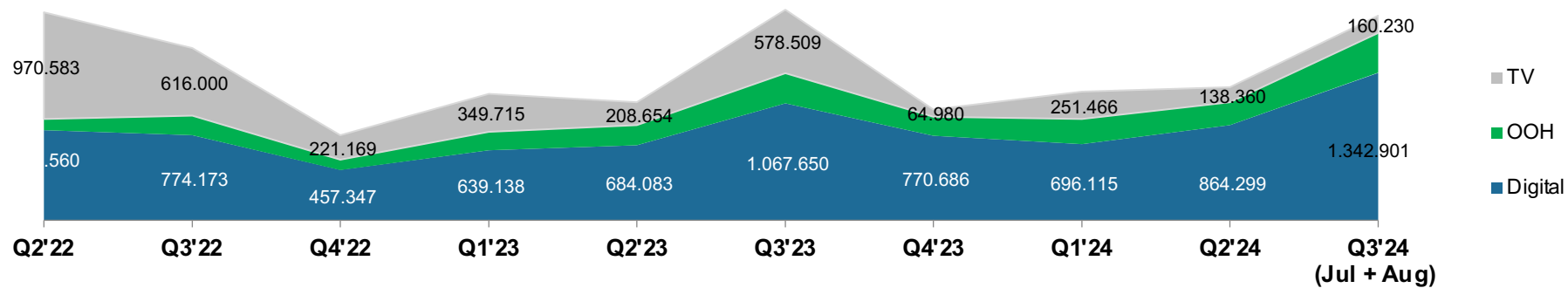
What is creating challenges for Lifebuoy on Salience?



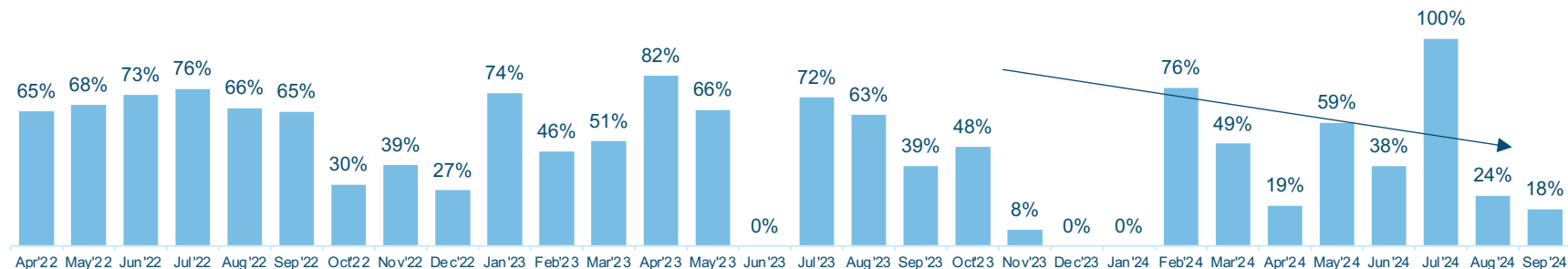
1

Overall context – Shift in DS, Media spending,
Driver of Salience

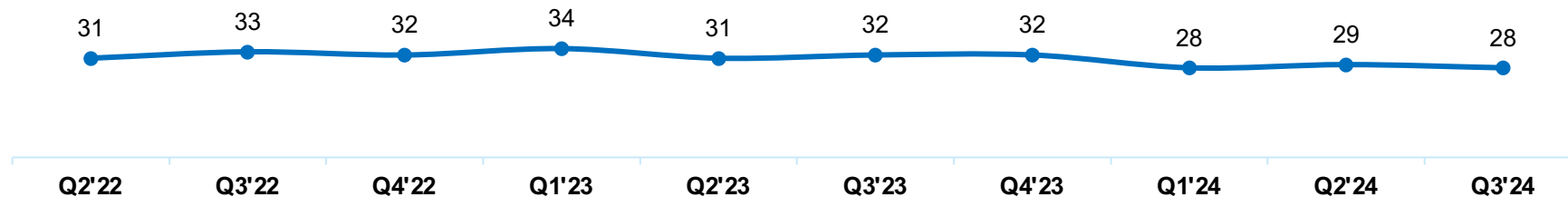
Spending by channel (Unit: Euro) – Source: Kantar Insights Engine



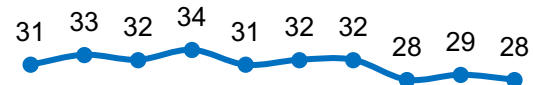
TV SOV



TOM

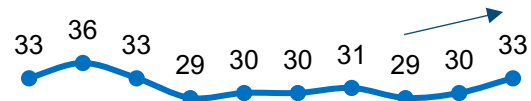


Total



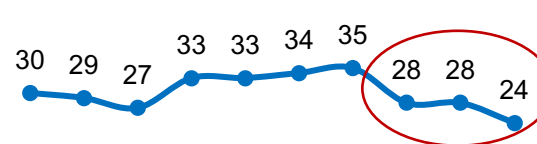
Q2'22 Q3'22 Q4'22 Q1'23 Q2'23 Q3'23 Q4'23 Q1'24 Q2'24 Q3'24

North



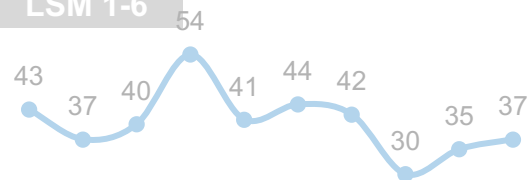
Q2'22 Q3'22 Q4'22 Q1'23 Q2'23 Q3'23 Q4'23 Q1'24 Q2'24 Q3'24

South



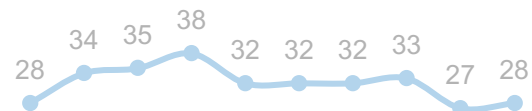
Q2'22 Q3'22 Q4'22 Q1'23 Q2'23 Q3'23 Q4'23 Q1'24 Q2'24 Q3'24

LSM 1-6



Q2'22 Q3'22 Q4'22 Q1'23 Q2'23 Q3'23 Q4'23 Q1'24 Q2'24 Q3'24

LSM 7-9



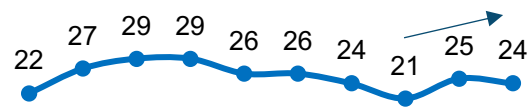
Q2'22 Q3'22 Q4'22 Q1'23 Q2'23 Q3'23 Q4'23 Q1'24 Q2'24 Q3'24

LSM 10+



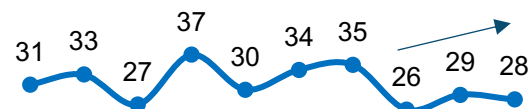
Q2'22 Q3'22 Q4'22 Q1'23 Q2'23 Q3'23 Q4'23 Q1'24 Q2'24 Q3'24

Age 15-24



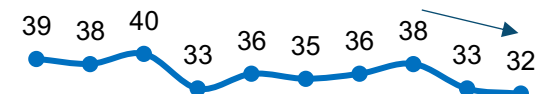
Q2'22 Q3'22 Q4'22 Q1'23 Q2'23 Q3'23 Q4'23 Q1'24 Q2'24 Q3'24

Age 25-39



Q2'22 Q3'22 Q4'22 Q1'23 Q2'23 Q3'23 Q4'23 Q1'24 Q2'24 Q3'24

Age 40+



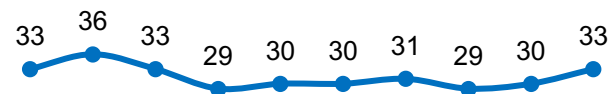
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2

Media and Visibility

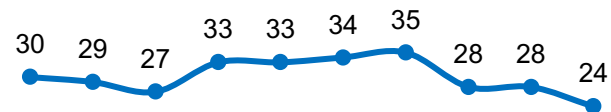
North vs South:

LFB TOM - North



Q2'22 Q3'22 Q4'22 Q1'23 Q2'23 Q3'23 Q4'23 Q1'24 Q2'24 Q3'24

LFB TOM - South



Q2'22 Q3'22 Q4'22 Q1'23 Q2'23 Q3'23 Q4'23 Q1'24 Q2'24 Q3'24

LFB - TBCA by channel – Abs/%SOE (NORTH)		Abs/SOE	Q2'23	Q3'23	Q4'23	Q1'24	Q2'24	Q3'24
TBCA	Abs		93	97	96	99	99	99
	%SOE		16.0%	15.7%	16.6%	17.5%	17.7%	17.2%
TV	Abs		53	63	64	65	47	56
	%SOE		24.9%	21.4%	24.8%	38.1%	34.1%	35.3%
Advertised/promoted in a shop	Abs		79	96	96	99	99	99
	%SOE		15.6%	15.7%	16.6%	17.5%	17.7%	17.2%
Outdoor Advertising	Abs		15	24	19	26	21	24
	%SOE		19.5%	24.0%	25.6%	30.1%	33.3%	35.7%
On social media or a messaging app (e.g. Facebook, Instagram, Twitter, Snapchat, TikTok)	Abs		13	22	27	38	30	36
	%SOE		15.4%	20.2%	24.3%	27.4%	30.9%	26.9%
On the Internet on a mobile device or tablet (e.g. YouTube / Online Magazine or news / Podcasts)	Abs		7	7	8	14	9	8
	%SOE		19.3%	18.0%	20.6%	24.4%	30.0%	35.1%
LCD screens	Abs		6	7	8	12	9	10
	%SOE		19.2%	14.5%	14.1%	23.4%	30.8%	34.7%

LFB - TBCA by channel – Abs/%SOE (SOUTH)		Abs/SOE	Q2'23	Q3'23	Q4'23	Q1'24	Q2'24	Q3'24
TBCA	Abs		99	95	91	96	91	95
	%SOE		13.8%	13.1%	16.2%	17.3%	15.9%	17.3%
TV	Abs		48	42	72	69	53	52
	%SOE		24.4%	20.5%	24.9%	23.5%	22.0%	23.3%
Advertised/promoted in a shop	Abs		88	95	91	95	91	95
	%SOE		14.6%	13.0%	16.3%	17.2%	15.8%	17.3%
Outdoor Advertising	Abs		25	25	49	49	40	37
	%SOE		28.6%	20.3%	24.8%	23.9%	21.3%	21.4%
On social media or a messaging app (e.g. Facebook, Instagram, Twitter, Snapchat, TikTok)	Abs		17	21	20	24	16	17
	%SOE		29.6%	27.5%	22.3%	18.2%	17.9%	18.4%
On the Internet on a mobile device or tablet (e.g. YouTube / Online Magazine or news / Podcasts)	Abs		5	2	8	4	4	10
	%SOE		38.1%	12.5%	17.6%	13.5%	14.0%	16.2%
LCD screens	Abs		8	10	25	34	20	22
	%SOE		58.3%	27.9%	25.0%	22.2%	17.2%	19.5%

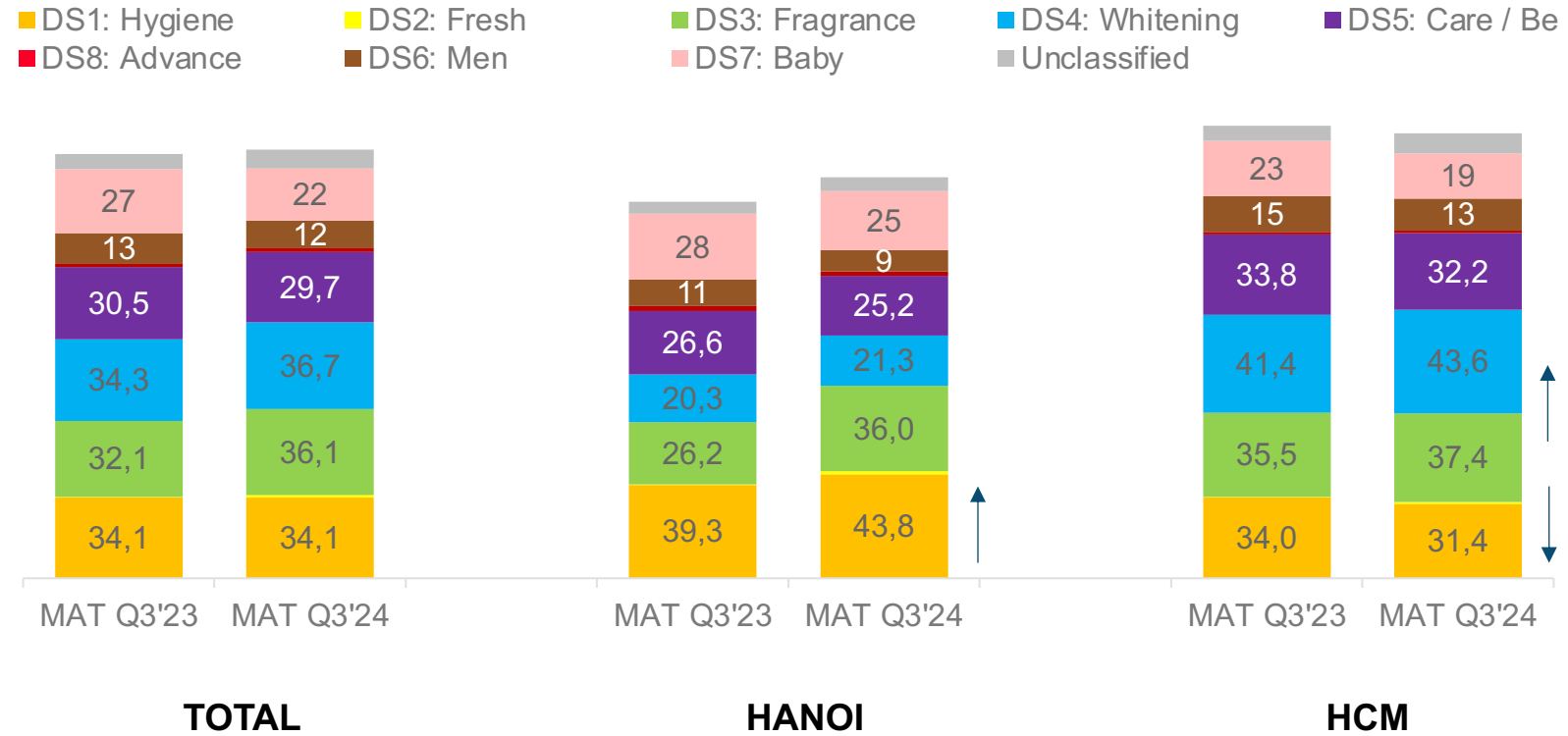
TOM - NORTH	Q2 2022	Q3 2022	Q4 2022	Q1 2023	Q2 2023	Q3 2023	Q4 2023	Q1 2024	Q2 2024	Q3 2024
Lifebuoy	33	36	33	29	30	30	31	29	30	33
Dove	23	24	21	23	22	25	24	21	24	30
Hazeline	4	2	3	4	8	8	7	10	8	11
Lux	14	18	22	19	22	22	23	23	24	19
Enchanteur	14	11	15	18	11	10	8	11	8	5
e100	0	0	0	0	1	0	1	2	1	1
Safeguard	1	1	0	0	1	0	1	0	0	0
Lactacyd	0	0	0	0	0	0	0	0	0	0
Gervenne	2	1	1	1	0	0	1	1	0	0
Purite	0	1	0	0	0	0	0	0	0	0
Aquala	0	0	0	0	0	0	0	0	0	0
Dettol	0	0	0	0	0	0	0	0	0	0

TOM - SOUTH	Q2 2022	Q3 2022	Q4 2022	Q1 2023	Q2 2023	Q3 2023	Q4 2023	Q1 2024	Q2 2024	Q3 2024
Lifebuoy	30	29	27	33	33	34	35	28	28	24
Dove	18	22	21	18	19	16	22	25	22	21
Hazeline	9	14	20	17	17	19	22	21	20	28
Lux	4	2	4	3	3	4	1	4	8	7
Enchanteur	12	14	15	15	12	13	10	11	12	13
e100	5	2	2	1	5	4	2	3	4	2
Safeguard	1	0	0	1	0	0	0	1	1	0
Lactacyd	0	0	0	0	0	0	0	0	0	0
Gervenne	1	0	0	2	2	1	0	1	1	1
Purite	4	2	0	1	1	0	2	3	0	2
Aquala	0	3	3	1	2	4	2	0	1	0
Dettol	0	0	0	1	0	0	0	0	0	0

Penetration - Hanoi	MAT Q3'22	MAT Q3'23	MAT Q3'24
Lifebuoy	22.6	22.7	28.0
LFB Core	19.3	20.8	23.0
LFB Jarvis	3.8	4.0	8.5
Beauty segment	35.3	37.5	44.1

Penetration - HCM	MAT Q3'22	MAT Q3'23	MAT Q3'24
Lifebuoy	21.6	20.7	20.0
LFB Core	18.1	17.7	16.2
LFB Jarvis	4.7	4.5	7.3
Beauty segment	53.1	52.3	56.6

DEMAND SPACE BY REGION GROUPS – %BUYER



Beauty brands are growing market share and power share while Lifebuoy core is facing challenge

	Volume share (%)			Power share (%)	
	MAT Q1'22	MAT Q1'23	MAT Q1'24	MAT Q3'23	MAT Q3'24
Lifebuoy	18.2	17.8	17.6	21.2	19.4
LFB Core	15.8	15.0	12.9		
LFB Jarvis	2.3	2.7	4.5		
Hazeline	7.4	7.6	8.4	11.8	13.2
Dove	2.3	2.8	2.8	17.1	18.3
Lux	0.7	0.8	1.1	11.2	11.7
Enchanteur	2.6	3.4	3.7	12.6	11.2
E100	0.9	0.8	1.1	6.2	6.5

Germ protection is now less easily coming to mind of consumers while beauty benefits went up on ranking

SKINCLEANSING - RELATIVE IMPORTANCE	SALIENT		
Imagery	MAT Q4'22	MAT Q3'23	MAT Q3'24
Leave your skin really soft and smooth	6	8	1
Give you glowing skin	5	1	2
Are more gentle and mild than other brands	7	11	3
Moisturise your skin better than other brands	9	5	4
Effectively nourish your skin	8	6	5
Have better fragrances than other brands	10	9	6
Effectively make your skin fairer/lighter	4	2	7
Are suitable for the whole family	2	3	8
Are recommended by dermatologists/doctors	1	4	9
Protect effectively from germs	3	7	10
Are more natural than other brands	12	10	11
Have a more attractive packaging than other brands	11	12	12

SOE

Absolute Imagery

BIP

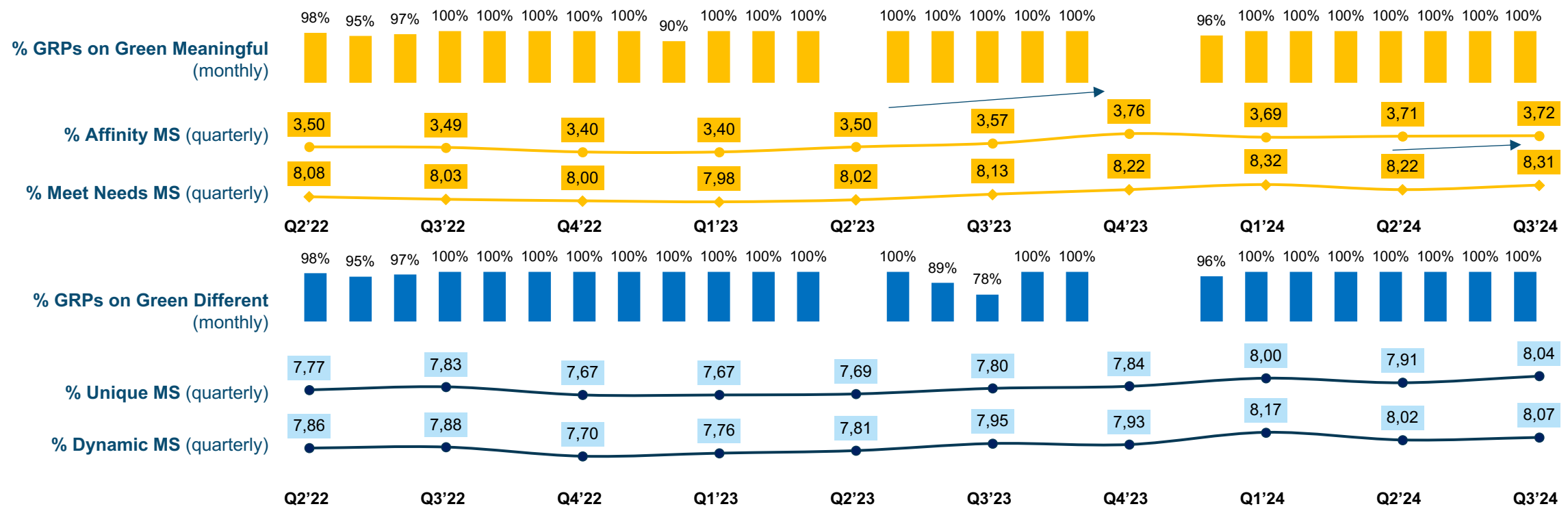
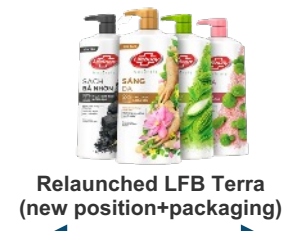
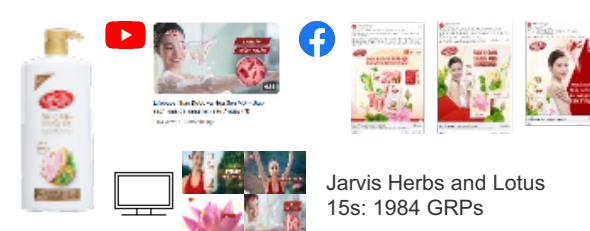
	Q2'22	Q3'22	Q4'22	Q1'23	Q2'23	Q3'23	Q4'23	Q1'24	Q2'24	Q3'24	Q4'23	Q1'24	Q2'24	Q3'24	MAT Q3'23	MAT Q3'24
Leave your skin really soft and smooth	13%	14%	15%	14%	14%	14%	14%	12%	13%	12%	63	56	62	59	-7	-17
Give you glowing skin	13%	14%	15%	14%	14%	14%	14%	13%	13%	14%	64	60	63	67	-6	-12
Are more gentle and mild than other brands	14%	15%	15%	15%	15%	15%	15%	15%	14%	15%	68	67	64	69	-4	-8
Moisturize your skin better than other brands	13%	13%	14%	13%	14%	15%	13%	11%	12%	12%	57	51	56	55	-8	-21
Effectively nourish your skin	13%	13%	15%	15%	15%	14%	15%	14%	14%	14%	70	66	66	68	-4	-11
Have better fragrances than other brands	14%	15%	16%	16%	15%	15%	16%	15%	15%	15%	68	68	69	71	-2	-5
Effectively make your skin fairer/lighter	13%	14%	14%	14%	14%	14%	13%	13%	13%	14%	60	61	61	66	-7	-14
Are suitable for the whole family	19%	19%	19%	19%	18%	18%	19%	20%	19%	19%	92	96	95	96	12	16
Are recommended by dermatologists/doctors	21%	22%	21%	20%	18%	19%	27%	24%	24%	24%	94	96	94	92	13	23
Protect effectively from germs	18%	19%	19%	20%	18%	17%	20%	20%	20%	19%	94	96	93	94	11	13
Are more natural than other brands	14%	15%	15%	16%	15%	16%	17%	16%	16%	16%	71	72	67	68	-2	-4
Have a more attractive packaging than other brands	14%	15%	15%	15%	15%	15%	15%	15%	14%	16%	64	66	63	70	-3	-8

Lifebuoy's Meaningful?

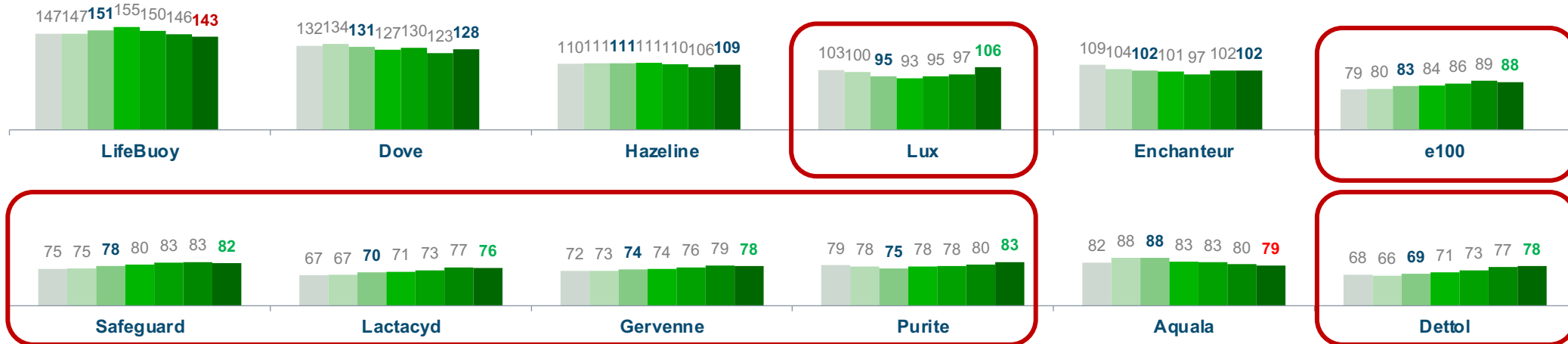




PERSONAL CARE



MEANINGFUL INDEX

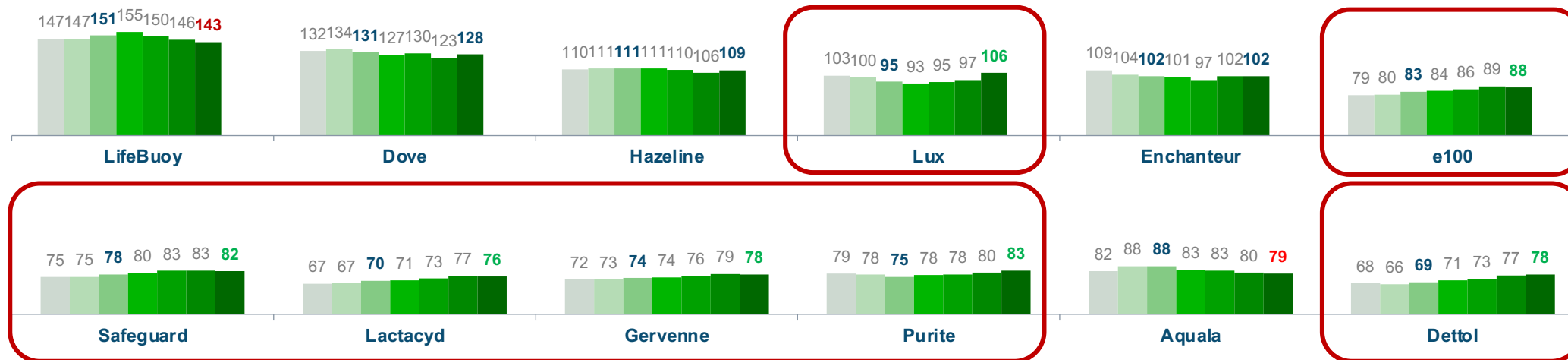


Affinity MS (MAT)	Q1'23	Q2'23	Q3'23	Q4'23	Q1'24	Q2'24	Q3'24	Gap between MAT Q3'23 vs MAT Q3'24	Meet Needs MS (MAT)	Q1'23	Q2'23	Q3'23	Q4'23	Q1'24	Q2'24	Q3'24	Gap between MAT Q3'23 vs MAT Q3'24
Lifebuoy	3.45	3.45	3.47	3.56	3.63	3.68	3.72	0.25	Lifebuoy	8.03	8.01	8.03	8.09	8.17	8.22	8.27	0.24
Dove	3.44	3.45	3.46	3.54	3.68	3.78	3.87	0.41	Dove	8.03	8.02	8.03	8.06	8.22	8.31	8.37	0.34
Hazeline	2.78	2.82	2.84	2.98	3.12	3.17	3.28	0.44	Hazeline	7.37	7.36	7.41	7.49	7.60	7.66	7.73	0.32
Lux	2.66	2.62	2.59	2.67	2.83	3.01	3.17	0.58	Lux	7.26	7.19	7.13	7.14	7.30	7.46	7.65	0.52
Enchanteur	2.87	2.82	2.85	2.9	2.98	3.06	3.11	0.26	Enchanteur	7.44	7.42	7.45	7.48	7.53	7.57	7.6	0.15
e100	1.74	1.74	1.74	1.74	1.86	1.89	1.93	0.19	e100	6.30	6.25	6.20	6.2	6.29	6.30	6.32	0.12
Safeguard	1.82	1.74	1.75	1.83	1.92	1.97	2.01	0.26	Safeguard	6.38	6.32	6.33	6.4	6.49	6.49	6.54	0.21
Lactacyd	1.60	1.54	1.53	1.62	1.79	1.92	2.00	0.47	Lactacyd	6.27	6.21	6.20	6.27	6.42	6.53	6.61	0.41
Gervenne	1.90	1.85	1.85	1.87	1.95	1.96	2.00	0.15	Gervenne	6.50	6.42	6.36	6.33	6.43	6.44	6.54	0.18
Purite	2.12	2.10	2.05	2.15	2.33	2.40	2.52	0.47	Purite	6.77	6.68	6.64	6.69	6.89	7.04	7.17	0.53
Aquala	1.85	1.80	1.69	1.57	1.55	1.54	1.55	-0.14	Aquala	6.47	6.42	6.29	6.05	6.00	5.97	5.93	-0.36
Dettol	1.19	1.22	1.20	1.38	1.56	1.65	1.86	0.66	Dettol	6.09	5.99	5.91	6.00	6.13	6.25	6.43	0.52

MEANINGFUL INDEX – OVERALL CATEGORY

■ 2023 Q1 (MAT) ■ 2023 Q2 (MAT) ■ 2023 Q3 (MAT) ■ 2023 Q4 (MAT) ■ 2024 Q1 (MAT) ■ 2024 Q2 (MAT) ■ 2024 Q3 (MAT)

[xx/xx] Significant higher/lower vs MAT Q3'23 at 95%



SKINCLEANSING - RELATIVE IMPORTANCE

MEANINGFUL

Imagery	MAT Q4'22	MAT Q3'23	MAT Q3'24
Leave your skin really soft and smooth	7	11	1
Give you glowing skin	5	5	2
Are suitable for the whole family	1	1	3
Effectively nourish your skin	10	10	4
Have better fragrances than other brands	4	8	5
Moisturise your skin better than other brands	9	6	6
Effectively make your skin fairer/lighter	3	4	7
Have a more attractive packaging than other brands	12	7	8
Are recommended by dermatologists/doctors	2	2	9
Protect effectively from germs	6	3	10
Are more gentle and mild than other brands	8	9	11
Are more natural than other brands	11	12	12

NORTH

Affinity MS (MAT)	Q3'23	Q3'24	Gap between MAT Q3'24 vs MAT Q3'23
Lifebuoy	3.62	4.00	0.38
Dove	3.66	4.09	0.43
Hazeline	2.51	3.16	0.65
Lux	3.25	3.70	0.45
Enchanteur	2.98	3.09	0.11
e100	1.39	2.01	0.62
Safeguard	1.85	2.19	0.34
Lactacyd	1.90	2.14	0.24
Gervenne	1.92	2.12	0.20
Purite	2.03	2.31	0.28
Aquala	1.71	1.73	0.02
Dettol	1.61	1.97	0.36
Meet Needs MS (MAT)	Q3'23	Q3'24	Gap between MAT Q3'24 vs MAT Q3'23
Lifebuoy	8.28	8.68	0.40
Dove	8.26	8.68	0.42
Hazeline	7.15	7.66	0.51
Lux	7.77	8.23	0.46
Enchanteur	7.64	7.66	0.02
e100	5.90	6.49	0.59
Safeguard	6.45	6.79	0.34
Lactacyd	6.55	6.82	0.27
Gervenne	6.41	6.71	0.30
Purite	6.59	7.03	0.44
Aquala	6.45	6.26	-0.19
Dettol	6.60	6.56	-0.04

SOUTH

Affinity MS (MAT)	Q3'23	Q3'24	Gap between MAT Q3'24 vs MAT Q3'23
Lifebuoy	3.42	3.51	0.09
Dove	3.39	3.66	0.27
Hazeline	3.25	3.42	0.17
Lux	2.04	2.69	0.65
Enchanteur	2.80	3.11	0.31
e100	1.89	1.63	-0.26
Safeguard	1.58	1.67	0.09
Lactacyd	1.13	1.76	0.63
Gervenne	1.80	1.81	0.01
Purite	2.11	2.69	0.58
Aquala	1.70	1.37	-0.33
Dettol	0.99	1.80	0.81
Meet Needs MS (MAT)	Q3'23	Q3'24	Gap between MAT Q3'24 vs MAT Q3'23
Lifebuoy	7.80	7.87	0.07
Dove	7.90	8.04	0.14
Hazeline	7.68	7.74	0.06
Lux	6.54	7.06	0.52
Enchanteur	7.32	7.46	0.14
e100	6.27	5.88	-0.39
Safeguard	6.09	6.08	-0.01
Lactacyd	5.80	6.25	0.45
Gervenne	6.29	6.27	-0.02
Purite	6.67	7.26	0.59
Aquala	6.17	5.60	-0.57
Dettol	5.54	6.35	0.81

PENETRATION

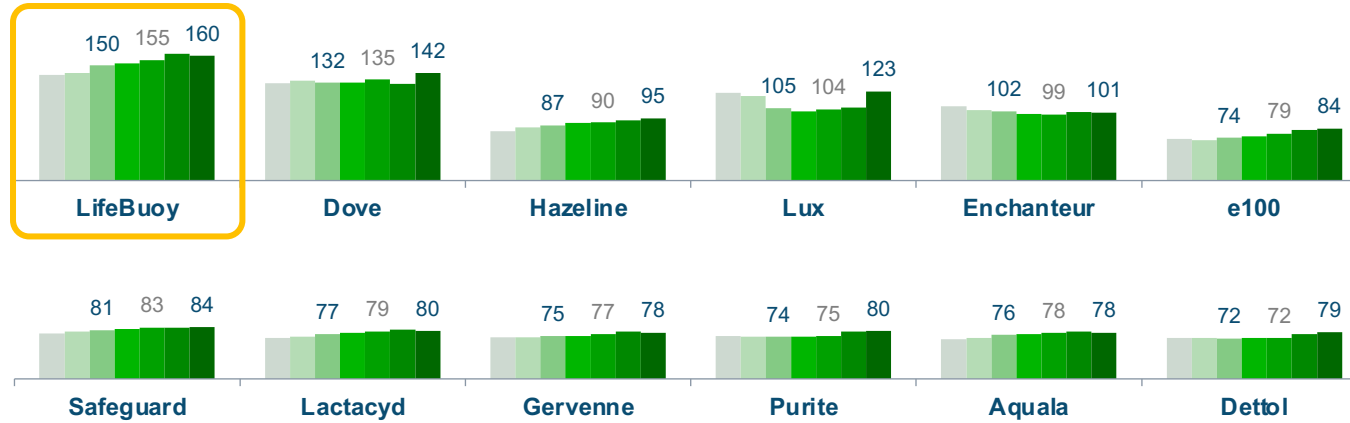
Penetration	Hanoi		HCM	
	MAT Q3'23	MAT Q3'24	MAT Q3'23	MAT Q3'24
Lifebuoy	22.7	28.0	20.7	20.0
Hazeline	6.8	9.2	12.9	14.1
Dove	5.0	7.0	6.3	5.3
Lux	*	4.5	3.5	3.3
ULV SG Others	*	*	2.4	2.1
Enchanteur SG	7.2	12.4	8.4	7.9
Gervenne	*	*	4.1	4.6
Carrie Junior	*	*	2.4	2.0
Lactacyd	8.6	8.6	3.0	2.3
Double Rich	*	*	6.6	6.4
Purite	*	*	2.9	4.9
Hatomugi	*	*	*	3.5
Familiar	*	*	3.8	2.5
Pigeon	*	*	2.8	2.6
On the Body	*	*	2.6	2.2
E100	*	*	*	*
D-Nee	*	*	*	*
Aquala	*	*	3.0	3.0
Olay	*	*	*	*
White Care	*	*	*	*
Algemarin	*	*	*	*
Thebol	*	*	*	2.2
Beauty Care Bangkok	*	*	1.7	1.5
Biore	*	*	*	*
Cetaphil	*	*	2.2	*
SG Others	18.4	20.0	31.2	35.4

Source: Penetration % | Total Urban 4 cities | 52 w/e
- Kantar Worldpanel

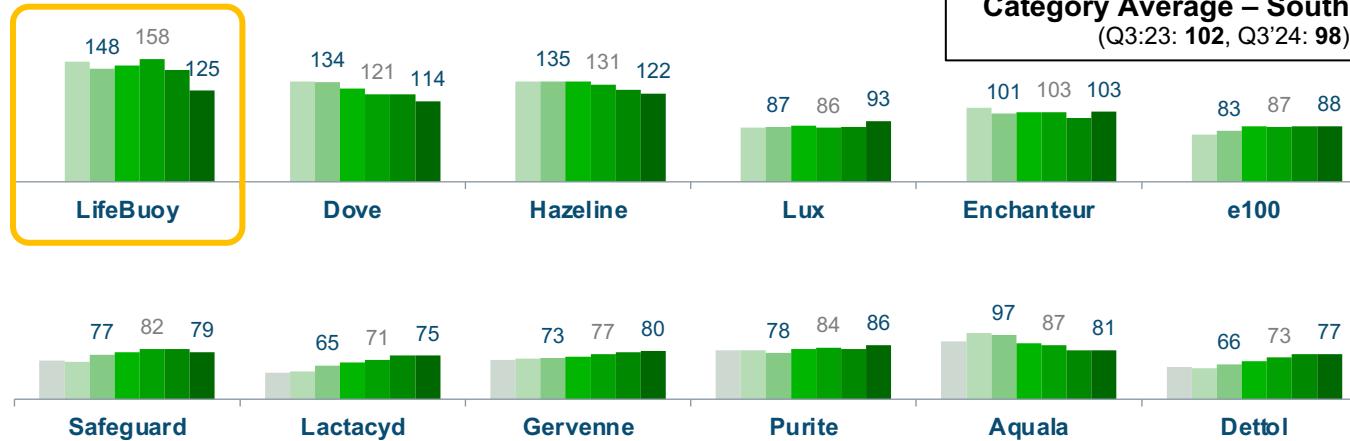
MEANINGFUL INDEX

NORTH

Category Average – North
(Q3:23: 98 ; Q3'24: 104)

SOUTH

Category Average – South
(Q3:23: 102, Q3'24: 98)



■ 2023 Q1 (MAT) ■ 2023 Q2 (MAT) ■ 2023 Q3 (MAT) ■ 2023 Q4 (MAT) ■ 2024 Q1 (MAT) ■ 2024 Q2 (MAT) ■ 2024 Q3 (MAT)

BRAND IMAGE PROFILES

Leave your skin really soft and smooth

Give you glowing skin

Are suitable for the whole family

Effectively nourish your skin

Have better fragrances than other brands

Moisturise your skin better than other brands

Effectively make your skin fairer/lighter

Have a more attractive packaging than other brands

Are recommended by dermatologists/doctors

Protect effectively from germs

Are more gentle and mild than other brands

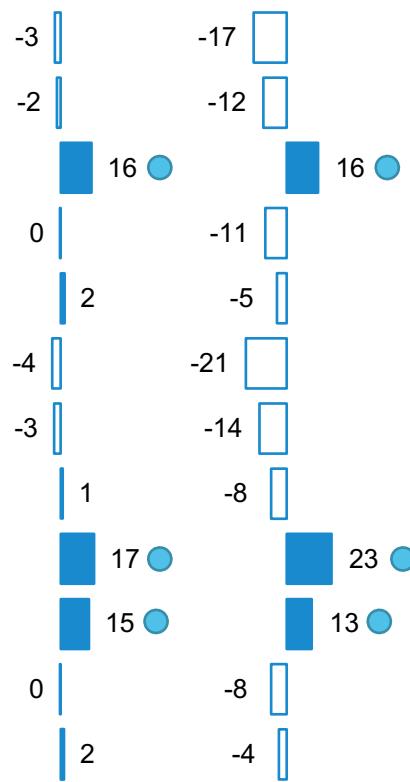
Are more natural than other brands

Base



MAT Q3'23

MAT Q3'24



(1496)

(1499)

● Defined attribute

SKINCLEANSING - RELATIVE IMPORTANCE

MEANINGFUL DIFFERENT

Imagery	MAT Q3'23	MAT Q3'24	MAT Q3'23	MAT Q3'24
Leave your skin really soft and smooth	11	1	7	1
Give you glowing skin	5	2	8	2
Are suitable for the whole family	1	3	11	12
Effectively nourish your skin	10	4	5	4
Have better fragrances than other brands	8	5	12	5
Moisturise your skin better than other brands	6	6	3	6
Effectively make your skin fairer/lighter	4	7	6	8
Have a more attractive packaging than other brands	7	8	4	3
Are recommended by dermatologists/doctors	2	9	1	9
Protect effectively from germs	3	10	2	10
Are more gentle and mild than other brands	9	11	10	7
Are more natural than other brands	12	12	9	11