



## Ice Cream in Asia

Mumbai  
14th November

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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. Words such as 'expects', 'anticipates', 'intends' or the negative of these terms and other similar expressions of future performance or results, including financial objectives to 2010, and their negatives are intended to identify such forward-looking statements. 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, including, among others, competitive pricing and activities, consumption levels, costs, the ability to maintain and manage key customer relationships and supply chain sources, currency values, interest rates, the ability to integrate acquisitions and complete planned divestitures, physical risks, environmental risks, the ability to manage regulatory, tax and legal matters and resolve pending matters within current estimates, legislative, fiscal and regulatory developments, political, economic and social conditions in the geographic markets where the Group operates and new or changed priorities of the Boards. 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

## Ice Cream – Global Mission



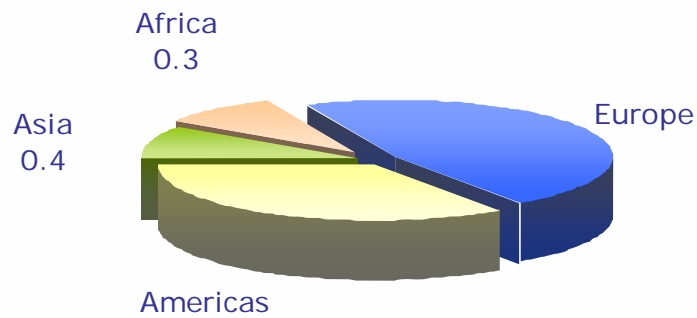
To become the world's preferred "Mood Food"



## Ice Cream in Asia



Sales contribution by region  
(€m)

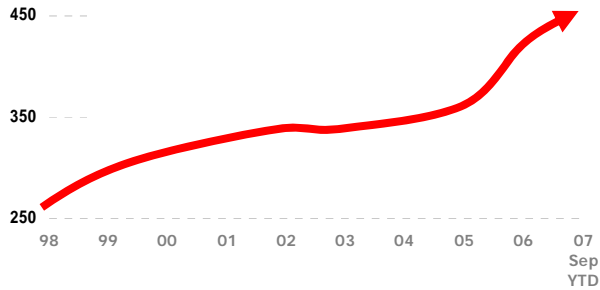


Based on 2006 sales

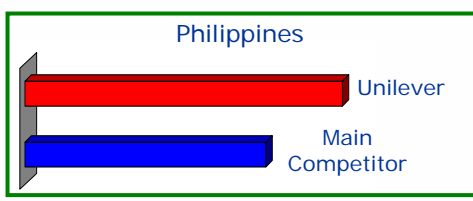
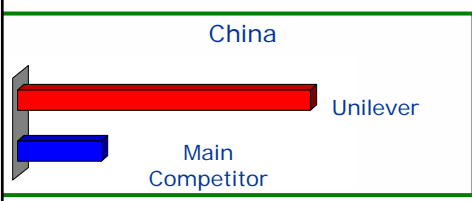
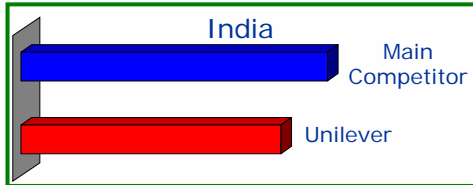
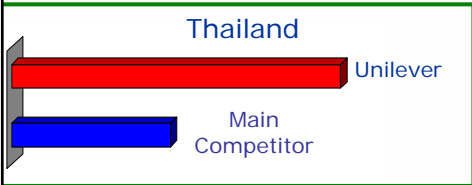
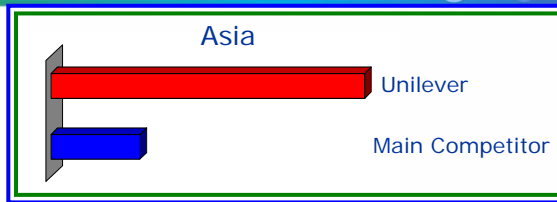
## Growth is Accelerating



Asia Ice Cream Sales Trend  
(€m)

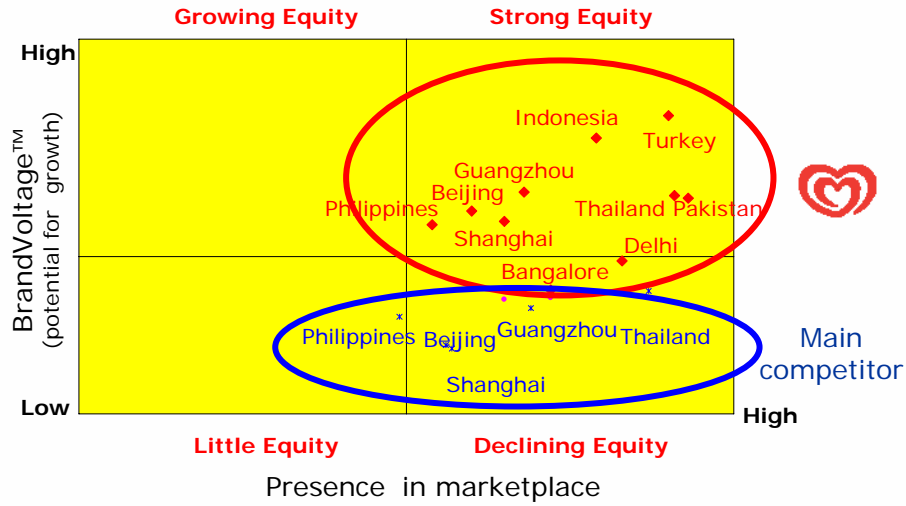


## Clear leader in region and key markets



Source: AC Nielsen, Unilever estimates

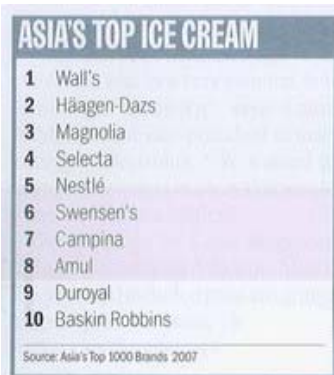
# ...with strong equity



Source: Millward Brown

# ...top brand recognition

Asia's top  
Ice Cream  
And ranked 24<sup>th</sup> among top  
1000 Asia brands



Source: Synovate

**ASIA'S TOP 1000 BRANDS**

**11-50**

**11 Yahoo**  
The company's acquisition push has helped Yahoo stay Asia's favorite search and internet browser service. In a highly competitive market, Yahoo's search engine and content services have helped it maintain its position as a leading internet service provider.

**12 Nike**  
Nike's brand equity is a testament to the brand's history of innovation and performance. The brand's focus on athletic footwear and apparel has helped it maintain its position as a leading brand in the sportswear industry.

**13 Nescafé**  
Nestlé's Nescafé brand is a testament to the brand's long history of innovation and performance. The brand's focus on instant coffee has helped it maintain its position as a leading brand in the coffee industry.

**14 Canon**  
Canon's brand equity is a testament to the brand's long history of innovation and performance. The brand's focus on consumer electronics has helped it maintain its position as a leading brand in the electronics industry.

**15 Starbucks**  
Starbucks' brand equity is a testament to the brand's long history of innovation and performance. The brand's focus on coffee and food services has helped it maintain its position as a leading brand in the food and beverage industry.

**16 Sony Ericsson**  
Sony Ericsson's brand equity is a testament to the brand's long history of innovation and performance. The brand's focus on mobile phones and accessories has helped it maintain its position as a leading brand in the mobile phone industry.

**17 Pampers**  
Pampers' brand equity is a testament to the brand's long history of innovation and performance. The brand's focus on baby care products has helped it maintain its position as a leading brand in the baby care industry.

**18 Google**  
Google's brand equity is a testament to the brand's long history of innovation and performance. The brand's focus on search engines and internet services has helped it maintain its position as a leading brand in the internet industry.

**19 Danone**  
Danone's brand equity is a testament to the brand's long history of innovation and performance. The brand's focus on food and beverage products has helped it maintain its position as a leading brand in the food and beverage industry.

**20 Pepsi**  
Pepsi's brand equity is a testament to the brand's long history of innovation and performance. The brand's focus on soft drinks and food services has helped it maintain its position as a leading brand in the food and beverage industry.

**21 LG**  
LG's brand equity is a testament to the brand's long history of innovation and performance. The brand's focus on consumer electronics has helped it maintain its position as a leading brand in the electronics industry.

**22 Yamaha**  
Yamaha's brand equity is a testament to the brand's long history of innovation and performance. The brand's focus on motorcycles and musical instruments has helped it maintain its position as a leading brand in the motorcycle and music industry.

**23 Toyota**  
Toyota's brand equity is a testament to the brand's long history of innovation and performance. The brand's focus on automobiles has helped it maintain its position as a leading brand in the automobile industry.

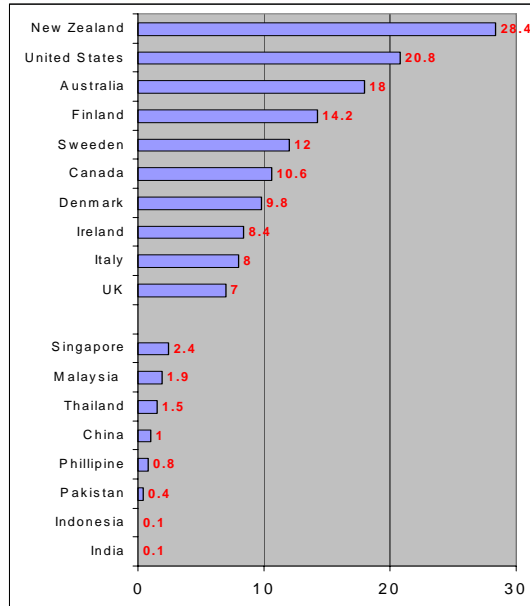
**24 Wall's**  
Wall's brand equity is a testament to the brand's long history of innovation and performance. The brand's focus on ice cream and food services has helped it maintain its position as a leading brand in the food and beverage industry.

**25 Lipton**  
Lipton's brand equity is a testament to the brand's long history of innovation and performance. The brand's focus on soft drinks and food services has helped it maintain its position as a leading brand in the food and beverage industry.

**26 Maggi**  
Maggi's brand equity is a testament to the brand's long history of innovation and performance. The brand's focus on food and beverage products has helped it maintain its position as a leading brand in the food and beverage industry.

**27 Shell**  
Shell's brand equity is a testament to the brand's long history of innovation and performance. The brand's focus on oil and gas products has helped it maintain its position as a leading brand in the oil and gas industry.

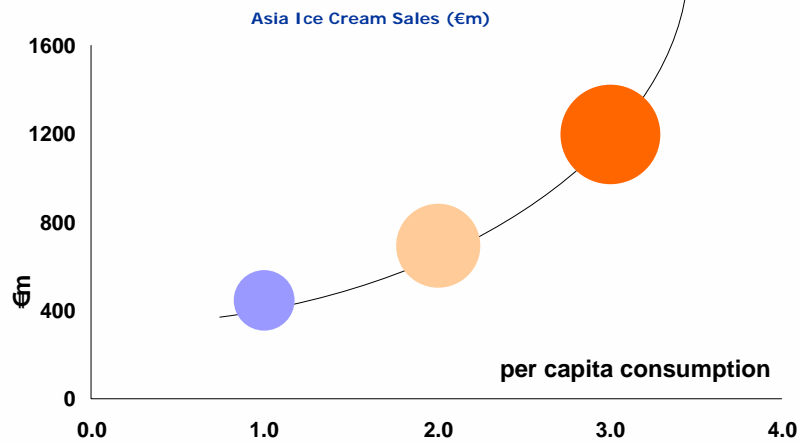
## We are just licking the topping



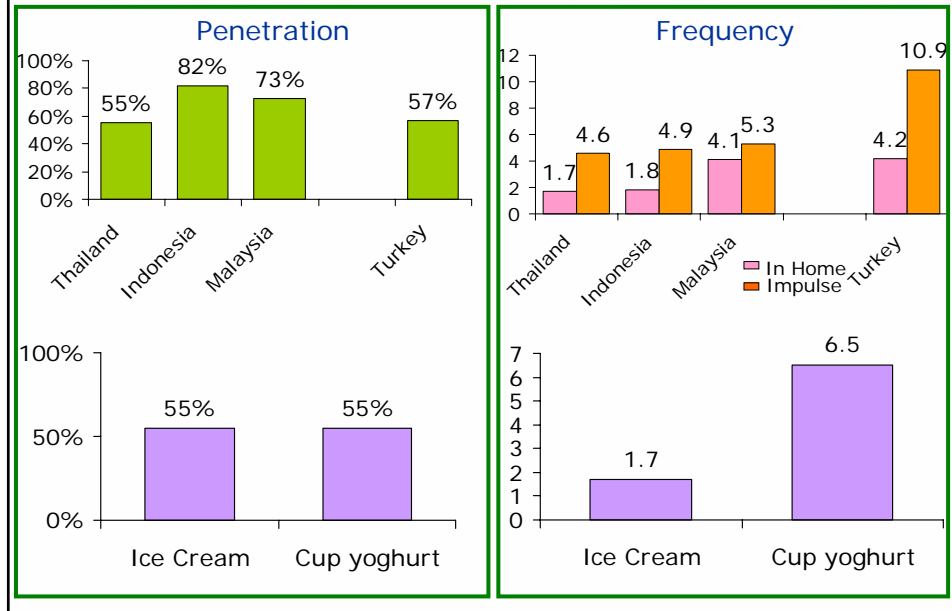
Per capita consumption (litres/pa)

## Asia growth opportunity

As per capita consumption increases, Asia sales could reach over €1bn



## The frequency challenge



## Triggers for growing consumption

- Growing urbanization
- Improved disposable income
- Increasing freezer penetration
- Growth of modern trade/convenience channels
- Improved cold chain (quality and availability)

# Barriers - Why don't people consume Ice Cream FREQUENTLY?

## Accessibility

- Affordability
- Availability



## Limited occasions/rituals



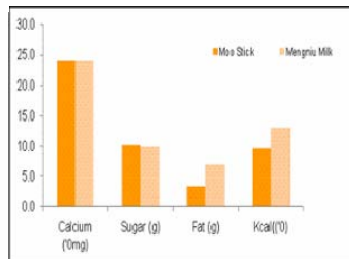
## Health perception

- Limited health benefits
- Negative perceptions



# 1.Reposition Category - Moo

Moo in Asia provides the necessary calcium for kids, which they don't get from their milk intake



**Here's a fun way for kids to get their calcium!**

Did you know that children need the calcium equivalent of 4 glasses of milk a day for healthy bone development?

Most children need to consume that amount every day. How do you get that much milk in their diets?

**Moo!** Moosies Milk is the answer. It's a delicious, creamy milk with a fun, chocolatey taste that kids love. It's also packed with calcium, so kids can get their daily calcium needs in a fun and tasty way.

15u

**Your 3rd glass of milk**

After School Evening

Moosies

More Calcium, More Fun!

F&O / WHO recommends 700mg Calcium for Kids 7-9

Country	Population	Revenue	%age Initiative	Target
India	3809	7009	48%	6-10 yrs
Thailand	611	7009	87%	9-12 yrs
Philips	2809	7009	48%	6-9 yrs
India	552	7009	88%	7-9 yrs
Indonesia	304	7009	67%	4-6 yrs
China	299	7009	82%	8-9-10 yrs



Moo Sandwich TVC

# Successfully rolled out across the region



Philippines

Thailand

Malaysia



South Africa

Indonesia

Pakistan

# Ramadhan programmes: Pakistan, Indonesia, Malaysia

Build ice cream ritual during Ramadhan

*Launch new festive variants*



## TV Moment (Mini) programmes

### New Platform of Mini for TV Moment



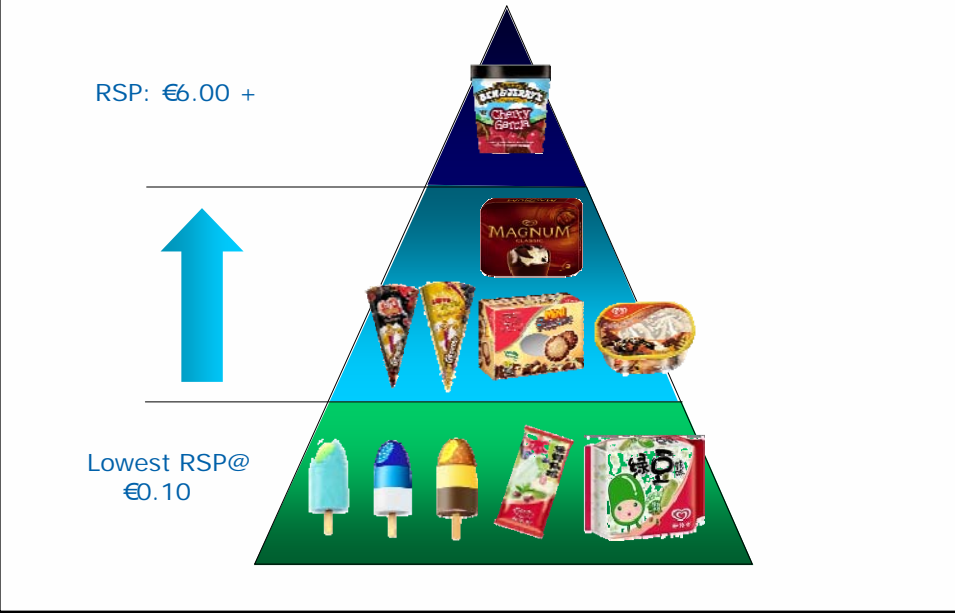
## ...with increasing visibility



# Integrated communication – Paddle Pop

The collage features a central poster for 'Paddle Pop CYBERION' with the character 'Mansthaba'. To the right is a circular diagram with four quadrants: 'MEDIA' (Game TVG, Novelty TVG, PC/Mobile Game, Movie), 'VIABILITY' (Taste, TOS, Outdoor), 'PROMO' (See-A-Price, Game Demonstration), and 'EVENT' (Super market, Live TV). Below the collage are three icons labeled 'theme', 'Novelty', and 'Game'.

# 5. Affordability - Playing the price piano



## Profitability



- Asia Ice Cream is a fast-growing category
- Has been generating positive economic profits and created value for the business

### Pressure

- input cost increase

### Actions

- price increase
- positive mix from uptrading
- cost savings
- technology enabled efficiency
- logistic synergies

## What will this deliver?



### **Our ambition**

Double Turnover from  
2005 to 2010

Improve gross margin  
and  
maintain robust profitability



**Thank you**