Hindustan Unilever Limited

Hindustan Unilever Limited
Unilever House
B D Sawant Marg
Chakala, Andheri East
Mumbai 400 099

Tel: +91 (22) 3983 0000
Web: www.hul.co.in
CIN: L15140MH1933PLC002030

19th July, 2016

Stock Code BSE: 500696
NSE: HINDUNILVR
ISIN: INE030A01027

BSE Limited,
Corporate Relationship Department,
2nd Floor, New Trading Wing,
Rotunda Building, P.J. Towers,
Dalal Street,
Mumbai – 400 001

National Stock Exchange of India Ltd
Exchange Plaza, 5th Floor,
Plot No. C/1, G Block,
Bandra – Kurla Complex,
Bandra (E),
Mumbai – 400 051

Dear Sir,

Sub: Annual Investor Meet

In furtherance to our letter dated 18th July, 2016, please find attached the remaining presentations made to the Investors at the Annual Investor Meeting held today. The said presentations are also being uploaded on the Company's website today.

Please take the above information on record.

Thanking You.

Yours faithfully,
For Hindustan Unilever Limited

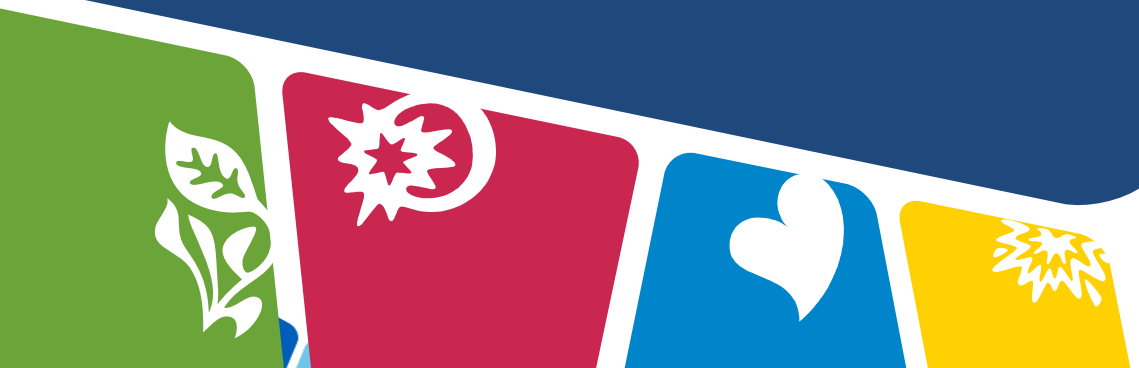
HINDUSTAN UNILEVER LIMITED MUMBAI

Dev Bajpai
Executive Director (Legal & Corporate Affairs)
and Company Secretary
Membership No. F3354

WINNING DECISIVELY

ANNUAL INVESTOR MEET | 19 JULY 2016

Sanjiv Mehta, CEO & MD



Hindustan Unilever Limited

SAFE HARBOR STATEMENT

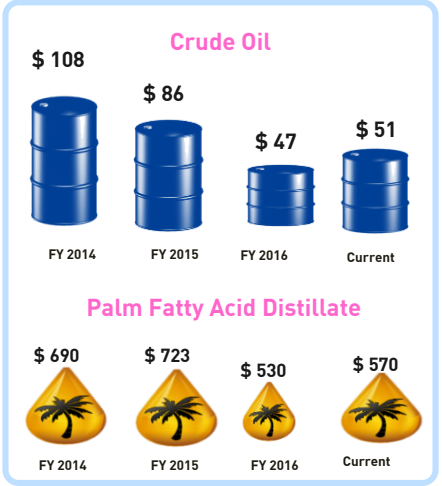
This Release / Communication, except for the historical information, may contain statements, including the words or phrases such as 'expects, anticipates, intends, will, would, undertakes, aims, estimates, contemplates, seeks to, objective, goal, projects, should' and similar expressions or variations of these expressions or negatives of these terms indicating future performance or results, financial or otherwise, which are forward looking statements. These forward looking statements are based on certain expectations, assumptions, anticipated developments and other factors which are not limited to, risk and uncertainties regarding fluctuations in earnings, market growth, intense competition and the pricing environment in the market, consumption level, ability to maintain and manage key customer relationship and supply chain sources and those factors which may affect our ability to implement business strategies successfully, namely changes in regulatory environments, political instability, change in international oil prices and input costs and new or changed priorities of the trade. The Company, therefore, cannot guarantee that the forward looking statements made herein shall be realized. The Company, based on changes as stated above, may alter, amend, modify or make necessary corrective changes in any manner to any such forward looking statement contained herein or make written or oral forward looking statements as may be required from time to time on the basis of subsequent developments and events. The Company does not undertake any obligation to update forward looking statements that may be made from time to time by or on behalf of the Company to reflect the events or circumstances after the date hereof.

FY 2015-16: A CHALLENGING ENVIRONMENT

Subdued Consumer Markets*



Volatile Commodity Prices



High Competitive Intensity



Rural growth at its lowest in a decade

Weak rural economy credit negative for India's rating: Moody's

Moody's says almost half of the poll respondents identified sluggish reform momentum as the greatest risk to India's macroeconomic story

Eastern India bears brunt of rural wage slowdown THE FINANCIAL EXPRESS

India's rural crisis, slowed farm growth may hurt 7.5% GDP dream

Sluggish investments, weak rural demand to keep Q4 earnings tepid

*Market growth (%)

WE ACTED PROMPTLY IN 2015 AS COMMODITY PRICES FELL

Scenario in 2009

Commodity Prices soften

2009



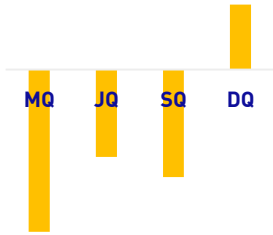
-58%

Growth of small players



Loss of market share as we were not quick to respond to raw material price changes

UVG



Driving **volume led profitable growth** in 2015

Commodity Prices soften

2015



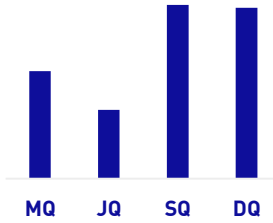
-45%

Growth of small players



- ✓ **Swift actions to correct price value equation for consumers**
- ✓ **Up-trading across portfolio as we reduced prices**

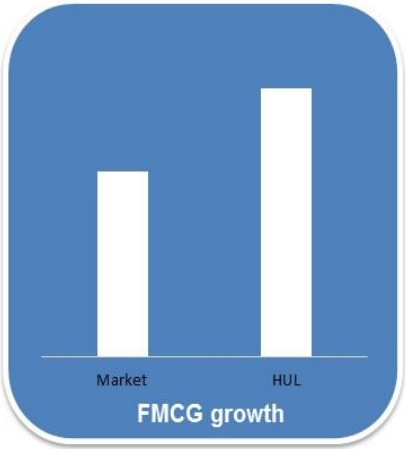
UVG



DELIVERED ON GOALS

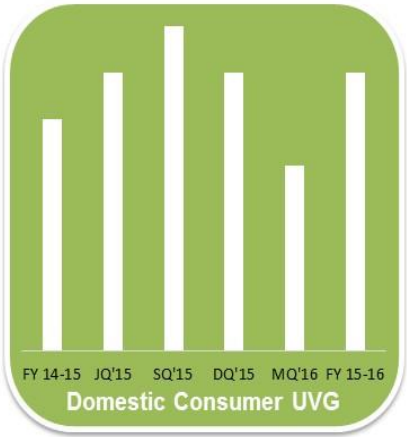
COMPETITIVE GROWTH

Ahead of market



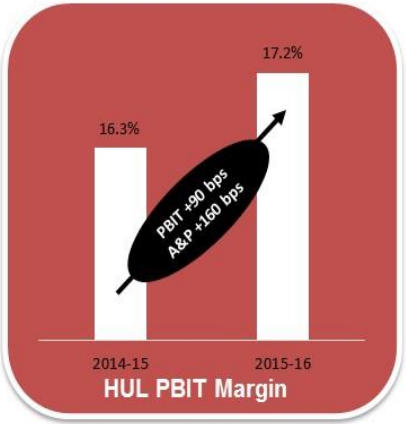
CONSISTENT GROWTH

Healthy UVG in a soft market



PROFITABLE GROWTH

Expanding margins whilst sustaining competitive investment



RESPONSIBLE GROWTH

Continued progress on our Sustainability priorities



UVG – Underlying Volume Growth; PBIT – Profit Before Interest and Tax

PROGRESS ON SUSTAINABILITY PRIORITIES

IMPROVING HEALTH AND WELL-BEING

>65 MILLION
people reached through Lifebuoy Handwashing Programme

>70 BILLION
litres of safe drinking water provided by Pureit in India, till date

Approximately
1,60,000
people have been impacted through Domex Toilet Academy (DTA)

DTA has helped build over
30,000
toilets in Indian households

100%
of our children's Frozen Desserts and Edible Ice 'Paddle Pop' portfolio in India contains 110 kilocalories or fewer per portion

REDUCING ENVIRONMENTAL IMPACT

REDUCTIONS IN MANUFACTURING[1]

42% in CO_2 emissions
48% in water usage
>92% in disposed waste

>200 BILLION
litres of water conservation potential created by Hindustan Unilever Foundation partnerships

398
tea estates certified as sustainable estates by Rainforest Alliance and Trustea in India

100%
tomatoes, used in Kissan Ketchup, sourced from sustainable sources

ENHANCING LIVELIHOODS

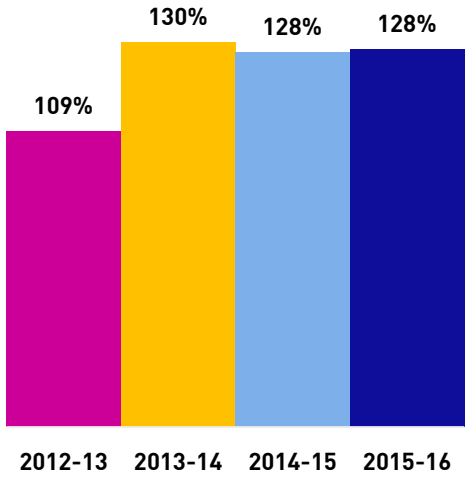
Project Shakti network has empowered nearly
70,000 Shakti Ammas
48,000 Shaktimaans

>2 LAKH
youth benefitted through Rin Career Ready Academy

1,38,000
people benefitted from Prabhat's programmes

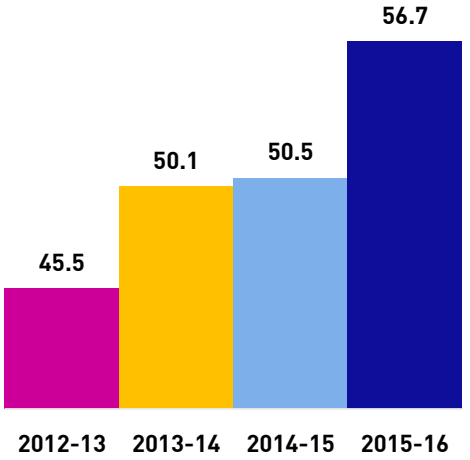
** vs. 2008 baseline*

SUSTAINED STRONG TRACK RECORD



Return on Capital Employed (%)

4 consecutive years >100%



Cash from operations (Rs. Bln)

3 consecutive years >Rs 50 bln

WINNING WITH CONSUMERS & CUSTOMERS

17 HUL brands feature in the 'Most Trusted Brands' 2015 edition

LUX, Surf excel, CLINIC PLUS+, RIN, Lifebuoy, Closeup, Vaseline, Dove, POND'S, Pepsodent, Vim, TAJ MAHAL, NEW Fair & Lovely, Active Wheel, Pears, LAKMÉ, sunsilk

9 HUL brands feature in BrandZ™ Top 50 Most Valuable Indian Brands ranking

NEW Fair & Lovely, Surf excel, Lifebuoy, Active Wheel, LUX, Brooke Bond, KWALITY WALL'S, RIN, LAKMÉ

HUL consistent recipient of various Supplier Awards from leading retail customers





Best Brand of Beauty

Business Director's Award for Excellence in Partnership

Best Joined Business Plan Award

Best Key Account Manager

Best New Launch

RETAINED TOP EMPLOYER POSITION

EMPLOYER OF CHOICE



5th YEAR in a row

#1 EMPLOYER

Campus

Mid Career recruits

Women

DREAM EMPLOYER



7th YEAR in a row

As per Nielsen Campus Track B-School Survey

CONTINUED RECOGNITION

Forbes 2015 THE WORLD'S MOST INNOVATIVE COMPANIES

HUL recognised as Most Innovative Company in India



HUL wins the ET 'Company of the Year' Award for Corporate Excellence

MMA MOBILE MARKETING ASSOCIATION

HUL recognised as the 'Most Innovative Marketer on Mobile'

mobillion

HUL adjudged as the 'Marketer of the Year 2015'

ASSOCHAM INDIA

HUL bags Corporate Governance Excellence Award in the Listed Company- Private Sector

INDIAN digital MEDIA AWARDS 2015

HUL won Gold for our social experiment 'Can Kids Influence Change in our World'

Golden Mikes 2015 Radio Advertising Awards

HUL recognized as the 'Radio Advertiser of the Year'

HUL receives Sustainable Gold Plus Label for 2015

sustainable plus gold 2015

FROST & SULLIVAN

HUL wins the 'Green Manufacturing Excellence Awards 2015'

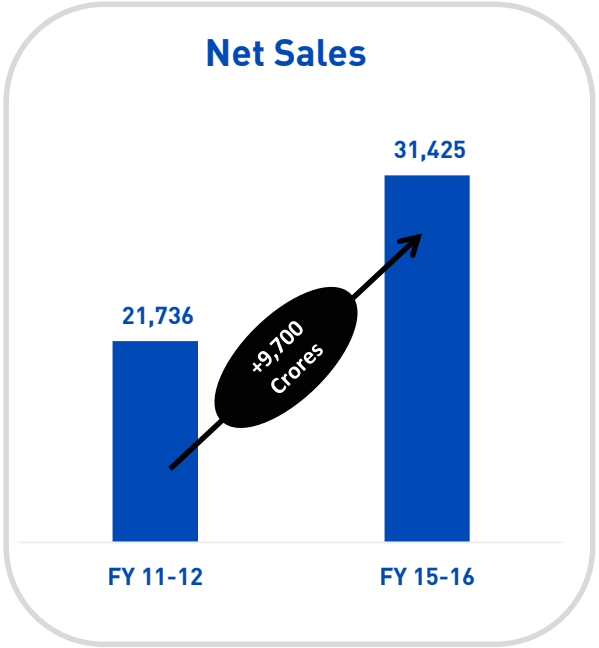


Kan Khajura Tesan wins the Spikes Asia 2015 – Grand Prix

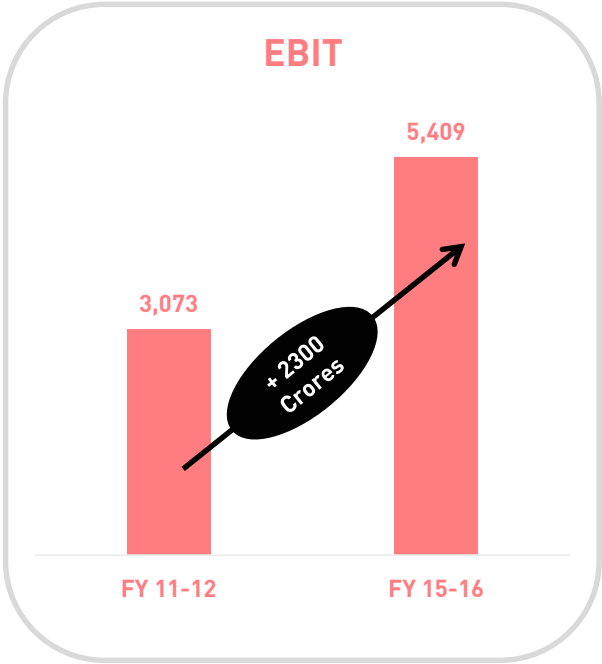


HUL's Doom Dooma Factory won the Greentech CSR Award

STRATEGY ON TRACK AND DELIVERING

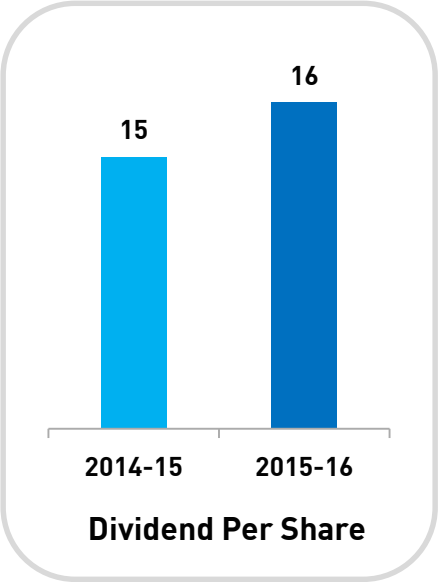


A > 30,000 Crore Company
~10,000 Crores added in the last 4y



Consistent increase in Operating profits

REWARDED SHAREHOLDERS



Particulars	2014-15	2015-16
Dividend Per Share	15.0	16.0
Interim	6.0	6.5
Final	9.0	9.5
No. of Share (Crs.)	216.35	216.39
Total Dividend Outflow* (Rs. Crs.)	3881	4140

Approval to the scheme for transfer of General Reserve Balance to P&L Account underway

** Including Dividend Distribution Tax*

HUL: WINNING DECISIVELY



Hindustan Unilever Limited

WE REMAIN OPTIMISTIC ON THE INDIA GROWTH STORY



India: Source of optimism

A Grant Thornton survey of global businesses has found that business optimism in India is among the top 5 in the world

Livemint

First Published: Tue, Feb 05 2013. 09 26 AM IST

Share Tweet

US investors optimistic about Indian economy: UK Sinha

By PTI | 14 Jun, 2016, 01.56PM IST

Post a Comment

IMF retains India's growth forecast, cuts global projection

India's growth pegged at 7.5% for 2016-17; global economic expansion estimated at 3.2%

BS Reporter | New Delhi
April 13, 2016 Last Updated at 00:40 IST

IMF, ADB upbeat on India growth story

31 March 2015, New Delhi, Subrata Majumder

HOME » POLITICS

FIRST PUBLISHED: TUE, APR 14 2015. 06 50 PM IST

IMF, World Bank see India growth picking up

India projected to do better than China this financial year, but govt needs to push forward the reforms agenda

India to lead Asia's economic growth: ADB

New Delhi, Mar 24 (PTI) Economic growth in Asia would be led by India for the next couple of fiscals as China is slowing down, the Asian Development Bank said Tuesday.

AND POSITIVE ON THE MID–LONG TERM OUTLOOK FOR FMCG

Millennials

India's millennials to be catalyst for consumption Business Standard



World's largest millennials population (470+ Mn)

Increasing Urbanization



438 Emerging Cities

6 Metropolises

Emerging Rurban

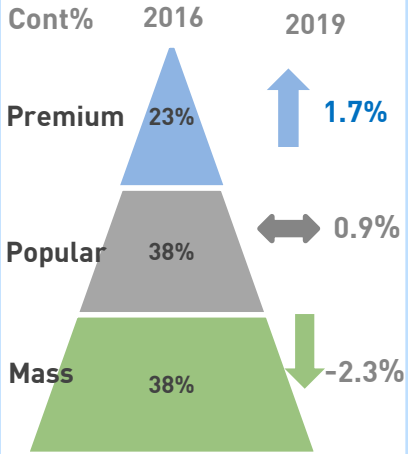
Mobile Internet penetration



2015 2019

34% → **47%**

Premiumisation

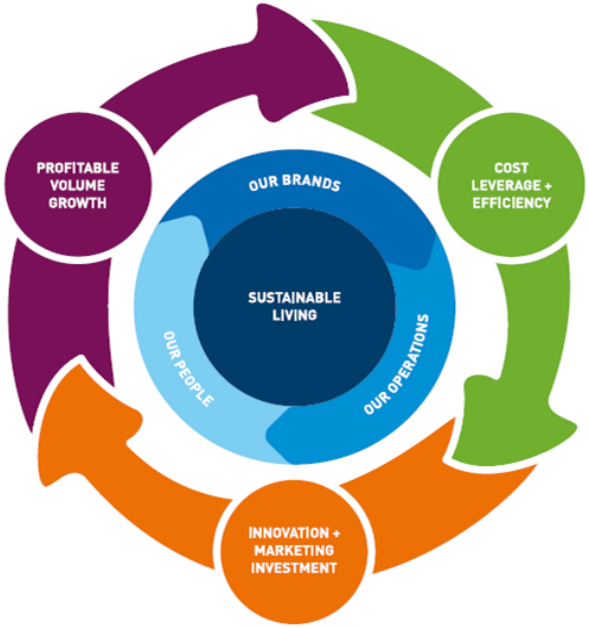


OUR STRATEGY REMAINS UNCHANGED

A Compelling Framework



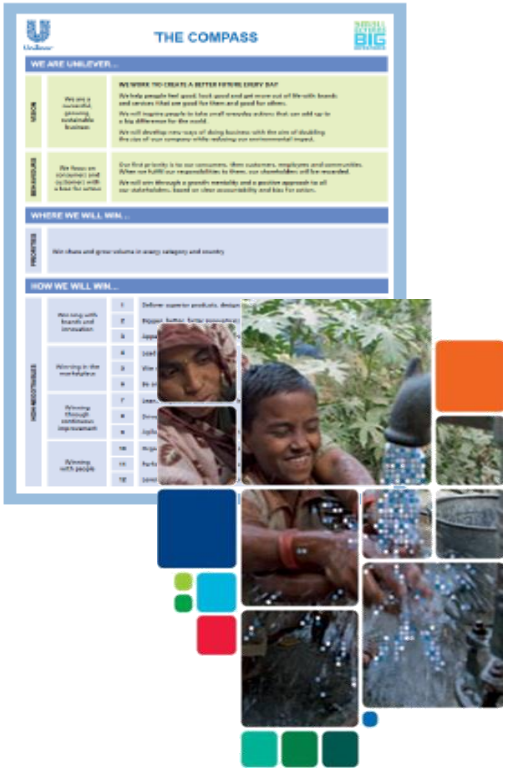
A Model Which Works



A Clear Set of Goals

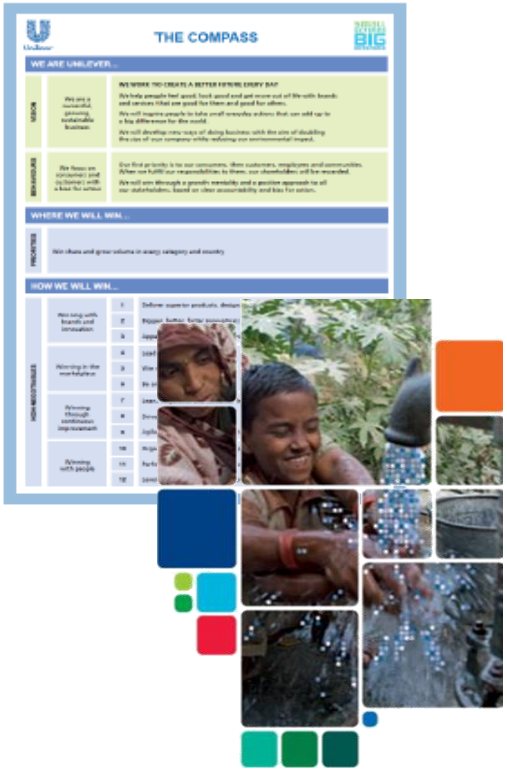
- Consistent **Growth**
- Competitive **Growth**
- Profitable **Growth**
- Responsible **Growth**

WINNING DECISIVELY



1. Winning with brands and innovation
2. Winning in the marketplace
3. Winning through continuous improvement
4. Winning with people
5. Unilever Sustainable Living Plan

WINNING DECISIVELY



1. **Winning with brands and innovation**
2. Winning in the marketplace
3. Winning through continuous improvement
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KEY THRUSTS

Innovating across the portfolio



Driving the Core



Magic and Craftsmanship



Harnessing Non-TV





INNOVATION REMAINS THE LIFELINE OF THE BUSINESS

















BUILDING OUR PRESENCE IN NATURALS

Within the existing portfolio





Extending our presence to new brands







Indulekha and St. Ives AV

STRENGTHENING THE CORE

Surf Excel



Clinic Plus



Red Label



STRENGTHENING THE CORE THROUGH INNOVATION AND PREMIUMISATION





Meeting consumer needs across price points

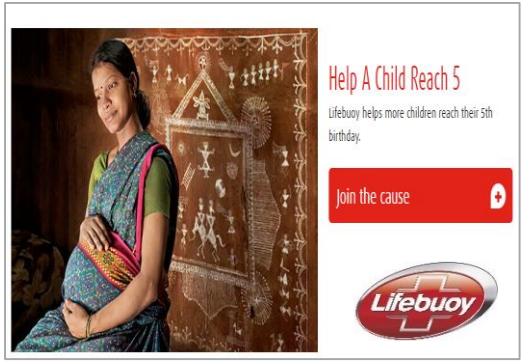
BUILDING BRANDS WITH PURPOSE















Lifebuoy Chamki and Red Label AV

BUILDING CRAFTSMANSHIP IN MARKETING

Through Products



Revolutionizing consumer promos

Through various media



Reviving art of copy with compelling advertorial

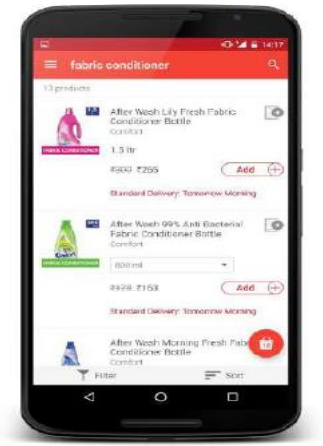
During Shopping Experience



Marketing at the Point of Sale

MAGIC IN MARKETING ALIVE IN E-COMMERCE

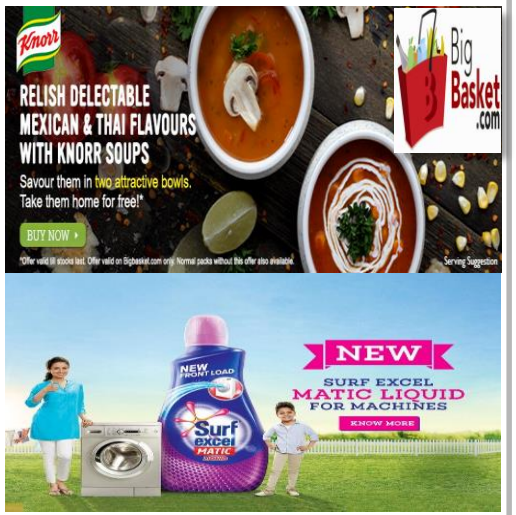
Hero Images of all products on website



Thematic Banners resulting in 2X click rate



Collaborating with E commerce partners for activations & launches



HARNESSING NON TV

Made for Web content





Print Innovation



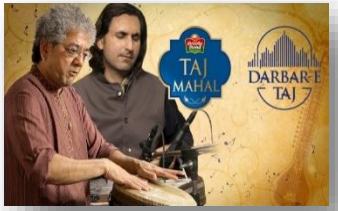


Mobile Marketing





Leveraging Outdoor



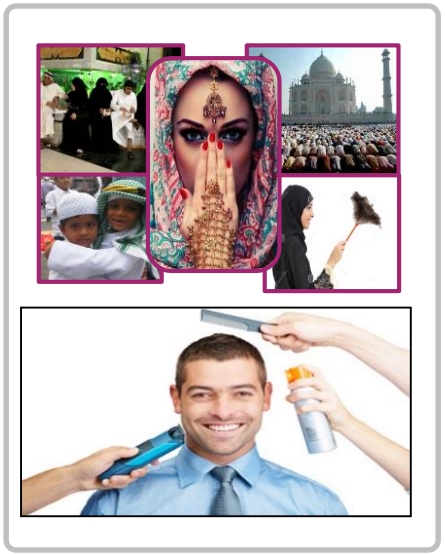


BUILDING CAPABILITY TO TAP INTO CONSUMER INSIGHT- PEOPLE DATA CENTER



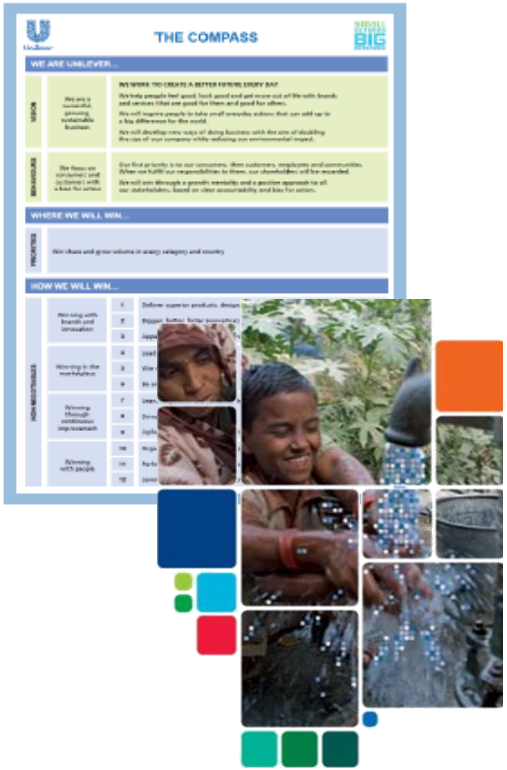
Targeting right influencers with right messaging





Spotting new trends
Targeting new segments

WINNING DECISIVELY



1. Winning with brands and innovation
2. Winning in the marketplace
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4. Winning with people
5. Unilever Sustainable Living Plan

KEY THRUSTS

Continued focus on Customer development



Building Channels of the Future



Market Development



MORE THROUGHPUT FROM MORE STORES

More Stores





More Assortment



Every Day Perfection





More Assortment in More Stores at More Frequency

WIMI STRATEGY REAPING BENEFITS



LIFTING CENTRAL INDIA



- ✓ Sharply Activating Clusters through Micromarketing
- ✓ Product Mix tailor-made according to consumer preferences

Central India growing @
1.5x all India, despite market slowdown

EVOLUTION OF CHANNELS

Channel Evolution

Rise of Specialist Format



Closed format large grocer



Open format large grocer



Drug-pharmacy



Drug-pharmacy & beauty

Emerging Channels





Modern Trade

12% of FMCG* in 2016



E-Commerce

4% of FMCG* by 2019

*Market

BUILDING E COMMERCE- THE CHANNEL OF THE FUTURE

Resourcing ahead of the curve

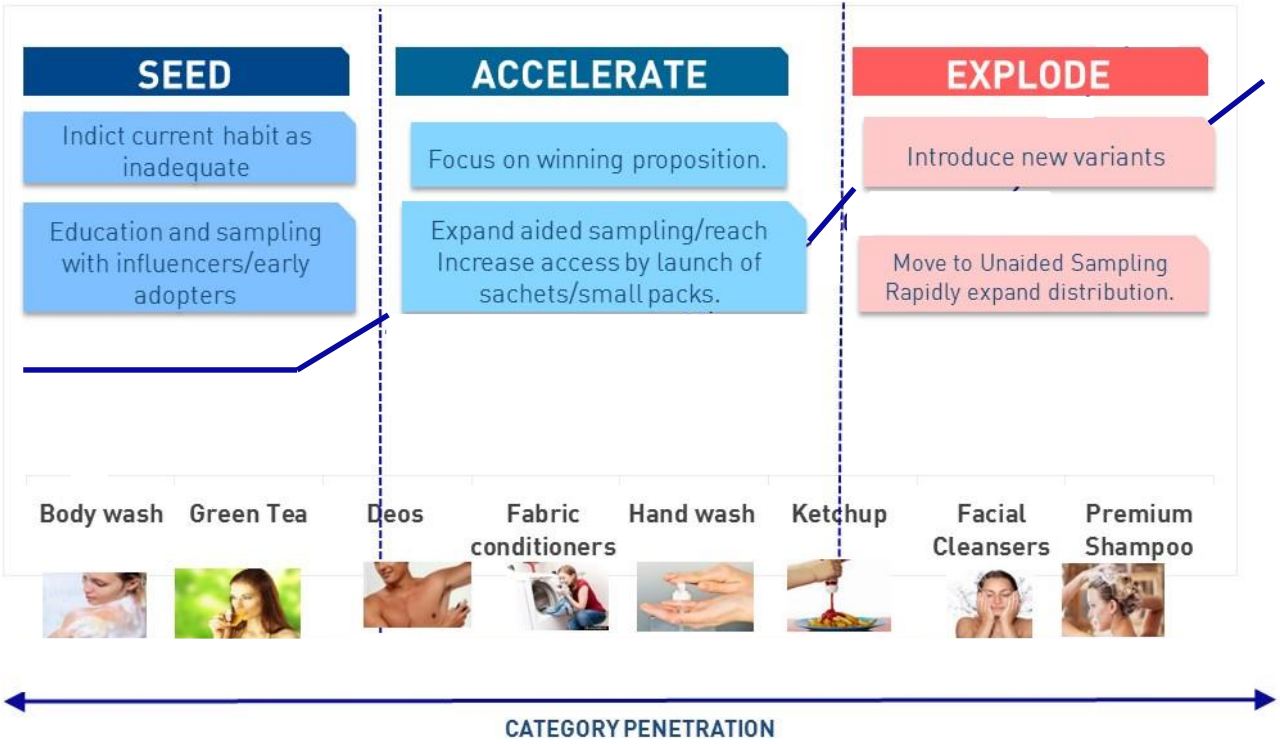


Winning across the platform

MARKETPLACE.COM
amazon.in
snapdeal
GROCERY.COM
bigbasket
GROFERS
DRUGSTORE.COM
NYKAA.COM Your Beauty. Our Passion.
PURPLLE.COM Complete Personal Care & Grooming

Our market share in E commerce > Modern Trade > General Trade

MARKET DEVELOPMENT REMAINS A PRIORITY



Drive trials through experiential Sampling

Aggressive investment behind trial generation.

8X

DEVELOPING THE MARKET ACROSS CATEGORIES

Home Care



Home to Home Sampling

Personal Care



Online Awareness

Refreshments



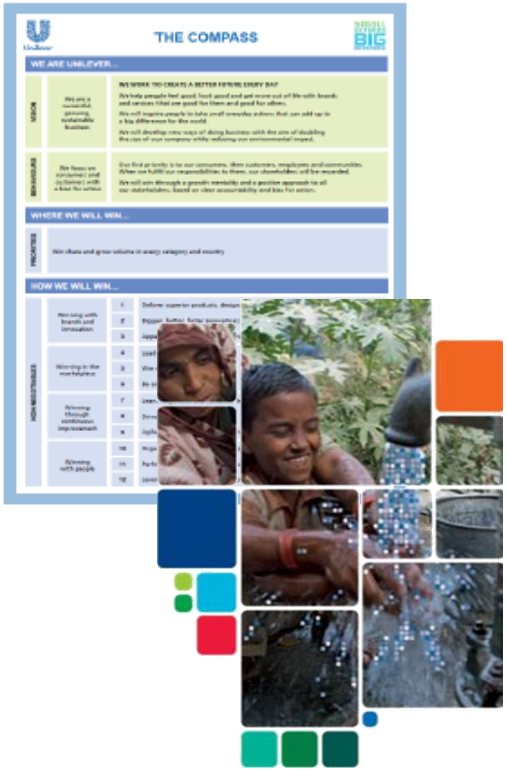
Wet Sampling

Foods



In-Store Sampling

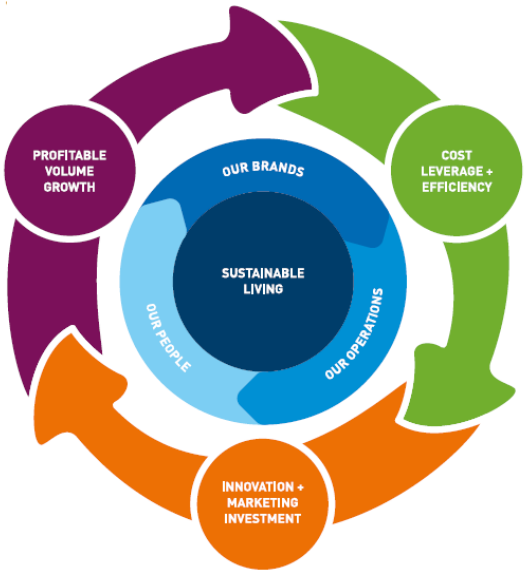
WINNING DECISIVELY



1. Winning with brands and innovation
2. Winning in the marketplace
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DRIVING THE VIRTUOUS CYCLE OF GROWTH

A Business Model That Works



Max the Mix

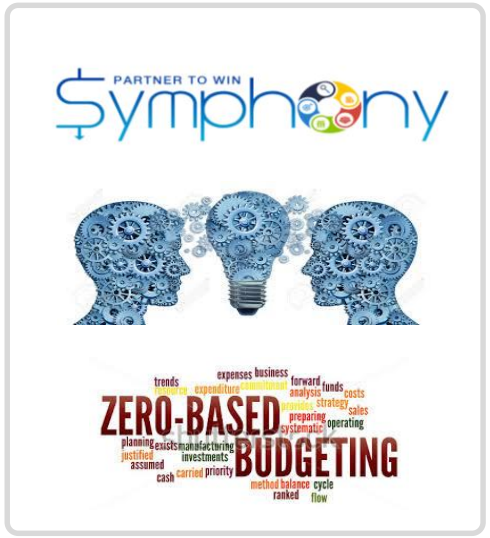
- Portfolio
- Channel, Geography
- Margin accretive innovation
- Pricing

End-to-end cost focus

- Materials
- Non Material Supply Chain Costs
- Return on Marketing Investments
- Overheads

KEY THRUSTS

Bringing efficiencies in ways of working



Customer service and quality at the moment of truth



Building back-end capabilities



BRINGING COST EFFICIENCIES IN WAYS OF WORKING

Project Symphony



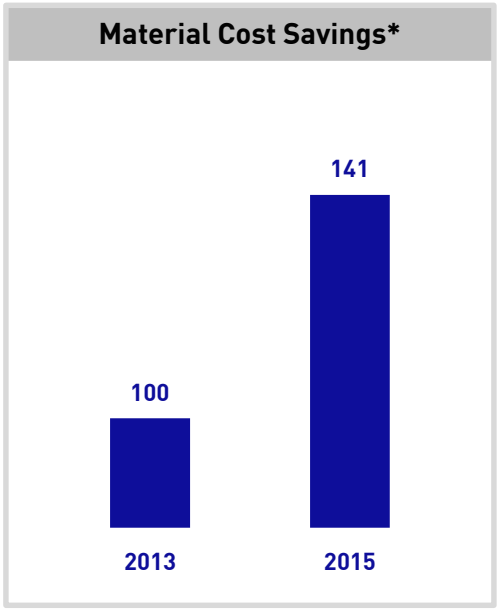
Zero based budgeting

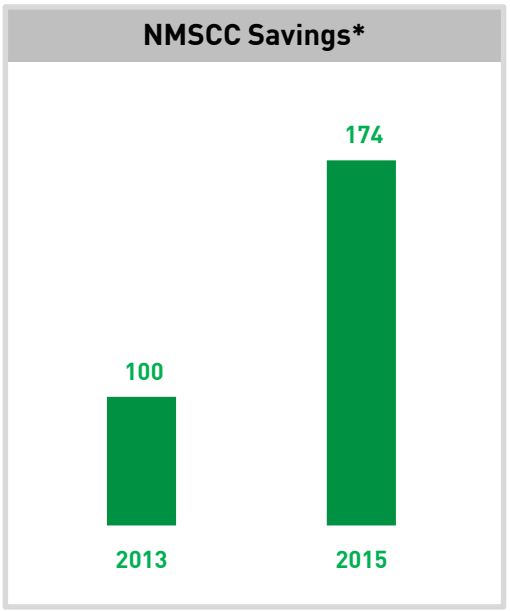


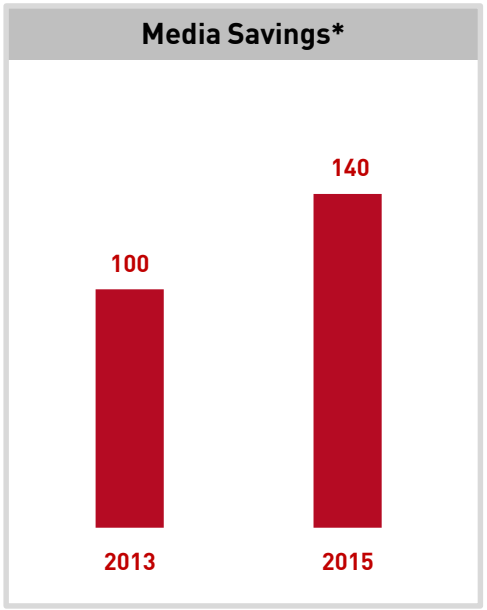
- ✓ Focused on value & growth
- ✓ Decisions based on data
- ✓ Driven by experienced business leadership

Making Savings a common agenda across functions

END TO END FOCUS

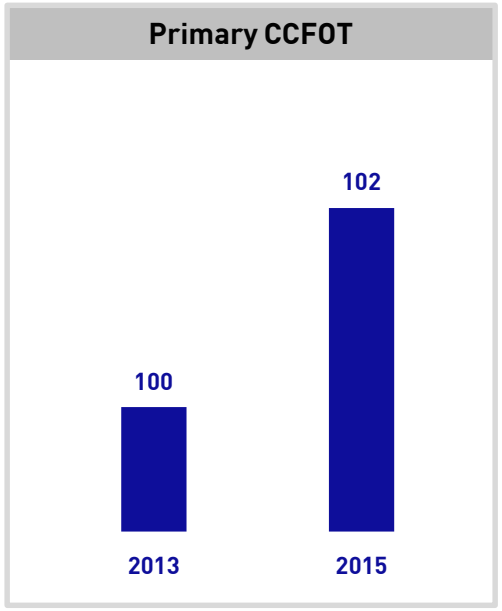


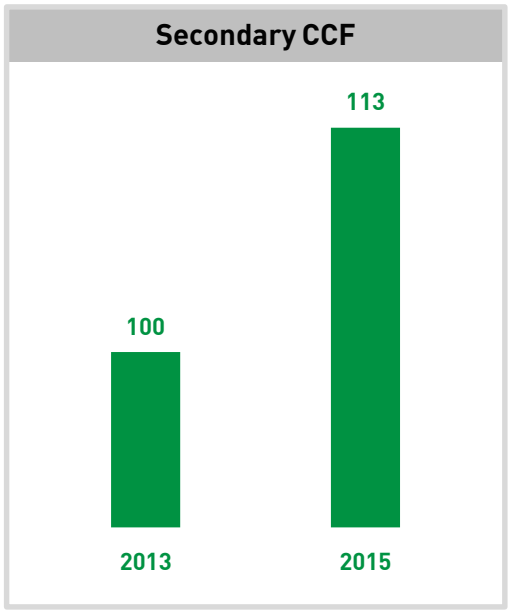


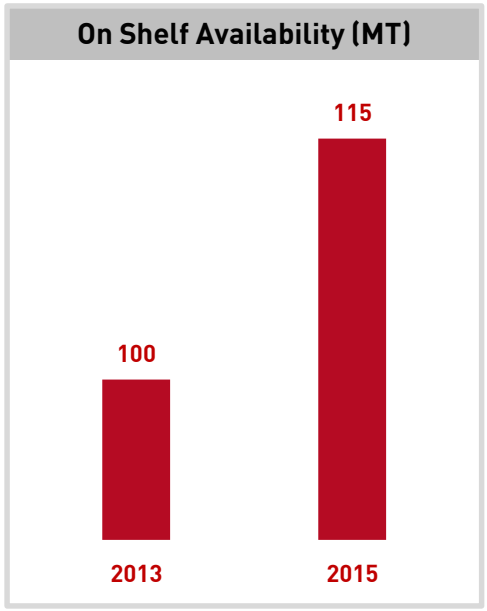


*Numbers indexed to 2013, base considered 100; NMSCC- Non Material Supply Chain Costs

SERVICE AT THE POINT OF PURCHASE







CCFOT - Customer Case Fill On Time; MT –Modern Trade

AMAZINGLY SIMPLE WHILST DRIVING DISCIPLINE

DELIGHT THROUGH SPEED & SIMPLICITY

Think End to End



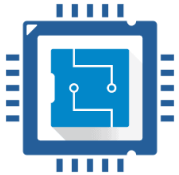
- ✓ No Touch Processes
- ✓ Simplify process
- ✓ Eliminate exceptions

Think Delight



- ✓ Customers
- ✓ Vendors
- ✓ Employees

Think Tech.



Relevant and new age technology adoption

Think Discipline



QUALITY AT THE MOMENT OF TRUTH

Consumer-Customer and brand led

Q in Design

Q @ the Point of Sale

Brilliant Quality Fundamentals

TOP FIVE FOR ZERO — Ensure zero safety incidents

Leverage IT for Quality

Drive supplier Quality

Thriving quality culture and people



Q mindset in the Last mile

Distributor → Retail

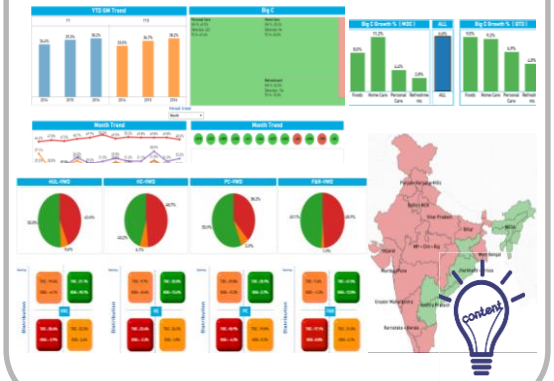


Grass-root activities to improve consumer centricity

USE THE POWER OF BIG DATA AND ANALYTICS

Advanced Analytics

Analytics Driven Insights



Power to user



Speed of Analysis



Cross Function Linking

Embedding and Integration

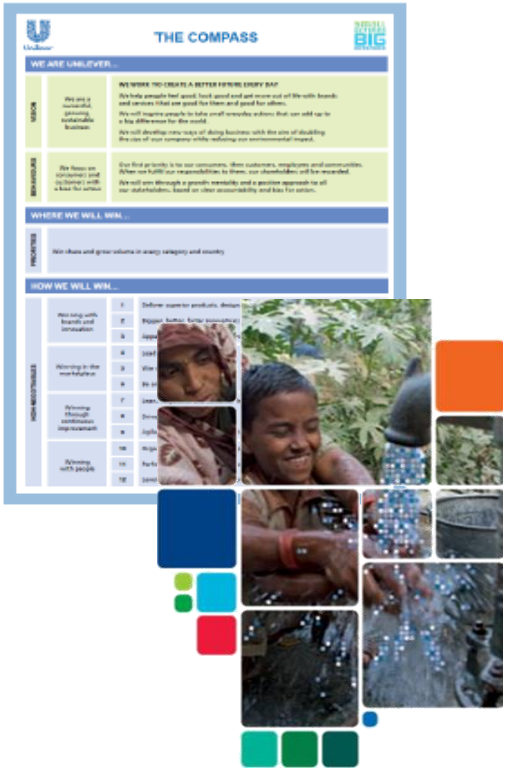
Training and capability development





LIVE WIRE

WINNING DECISIVELY



1. Winning with brands and innovation
2. Winning in the marketplace
3. Winning through continuous improvement
4. Winning with people
5. Unilever Sustainable Living Plan

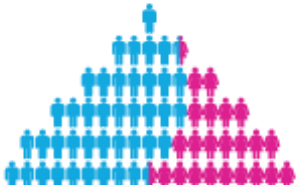
WINNING WITH OUR PEOPLE

Flexible and Agile



MAPS
MATERNITY AND PATERNITY SUPPORT

Diversity and Inclusion





Employee Well Being





Winning Culture



WINNING CULTURE

Founder Mentality

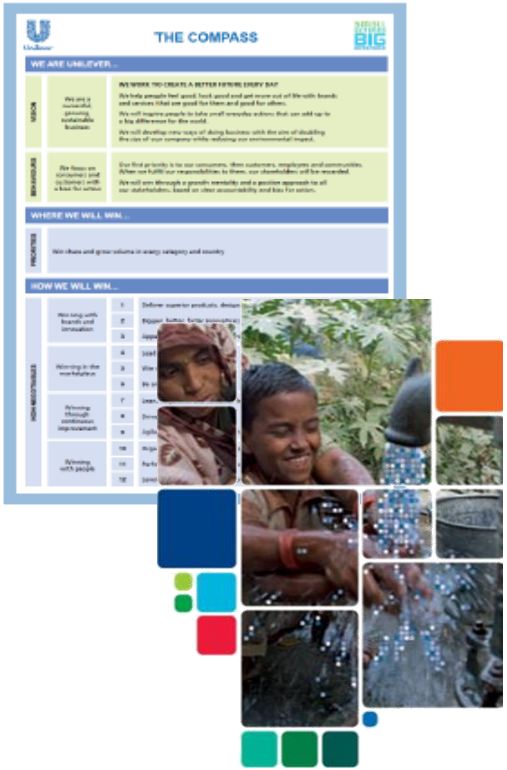


- **Owner's Mindset** – Long term lens
- **Frontline Obsession** - Robust frontline
- **Insurgency -** Real time feedback with strong control systems

Entrepreneurial spirit

THE UNILEVER FOUNDRY

WINNING DECISIVELY



1. Winning with brands and innovation
2. Winning in the marketplace
3. Winning through continuous improvement
4. Winning with people
5. Unilever Sustainable Living Plan

HINDUSTAN UNILEVER FOUNDATION

Water Conservation



200 billion litres*
Cumulative and Collective Potential

Crop Yield



1.5 lakh tonnes*
Cumulative Annual Agriculture Production

Person Days Generated



20 lakh*
Cumulative Person Days Generated

Impact >250 Mn people by 2020 | 1 in every 5 Indians

* Assured Figures

DOING WELL BY DOING GOOD

SWACHH AADAT, SWACHH BHARAT

Mass Media



Haath Muh Bum
Most Viewed Campaign on YouTube with 20 million views
75 million people reached

Swachh Basti



Touched 200,000 lives through the pilot

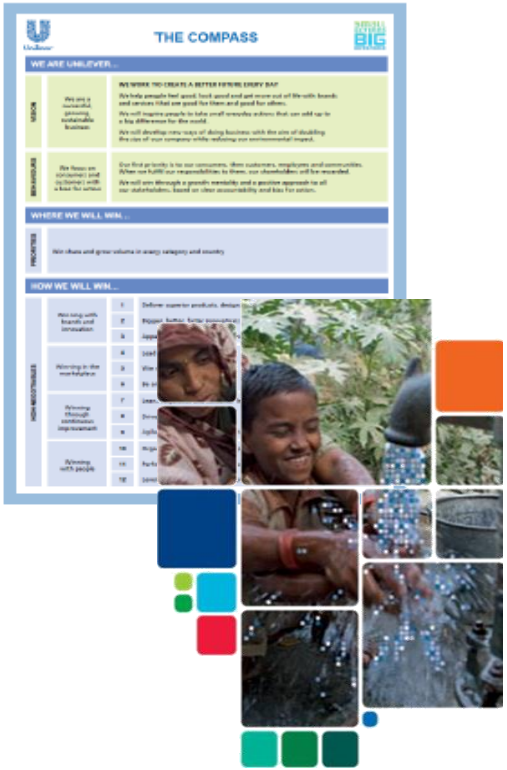
Swachhata Doot



Touched 100,000 lives through our 'Swachhata Doots'

Haath Muh Bum AV

WINNING DECISIVELY



1. Winning with brands and innovation
2. Winning in the marketplace
3. Winning through continuous improvement
4. Winning with people
5. Unilever Sustainable Living Plan

WE HAVE WHAT IT TAKES...

Unilever

Great Heritage	Great Brands	Great People	Great Capability

Hindustan Unilever Limited

HINDUSTAN LEVER LIMITED

Annapurna · Clinic Plus · Dove · Hamam · Comfort Fabric Conditioner · Lakmé · Knorr · Liril 2000 · Kissan · Lifebuoy · Pears · Lux · Red Label · TRESemmé · Pepsodent · Pond's · Pureit · Rin



Distribution

Rural

Supply Chain

IQ

Finance

USLP

CATEGORY STRATEGIC THRUSTS

Home Care





Personal Care





Refreshment





KWALITY WALL'S™

Foods





THANK YOU

For More Information

VISIT OUR WEBSITE

http://www.hul.co.in/investorrelations/



HUL INVESTOR APP



FOODS:
WINNING DECISIVELY

Hindustan Unilever Limited

BUSINESS OVERVIEW- FOODS AND REFRESHMENT

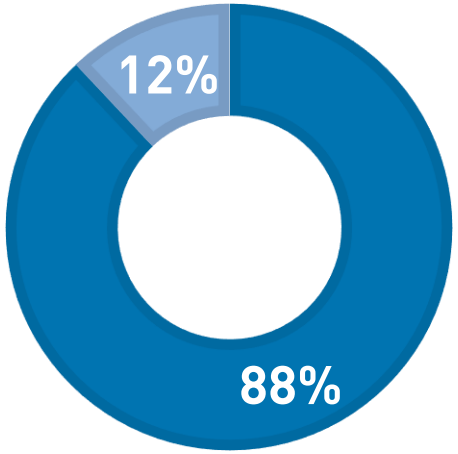
SIZEABLE BUSINESS
PROFITABLE BUSINESS



~ Rs. 5500 Cr

Size & Profitability: TOP 5

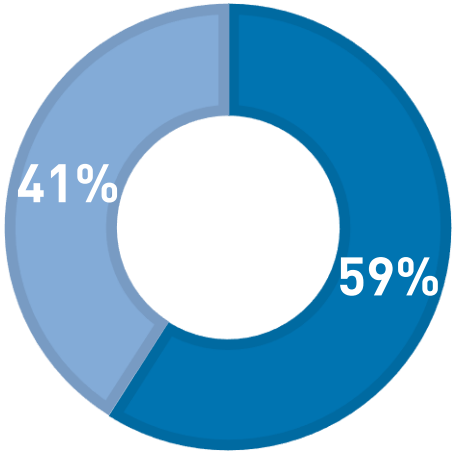
STRONG PLAYER
LEADER/CONTENDER



No.1 or 2

88% of business

GOOD MIX
SCALE Vs MD



59%: Scale

41%: Market Development

BROAD BASED DOUBLE DIGIT GROWTH

F&R



>10% CAGR
(2013 – 16)*

REFRESHMENTS



>10% CAGR
(2013 – 16)*

FOODS



>10% CAGR
(2013 – 16)*

** Financial Year*

New structure designed to accelerate growth for each category

FOODS VISION

"food that tastes good, does good and doesn't cost the earth"

KNORR
IN EVERY KITCHEN



KISSAN
IN EVERY TIFFIN

CONSISTENT, COMPETITIVE & PROFITABLE GROWTH ON CORE

Unilever

kissan



>15%
CAGR (2013–16)*

300bps
(SHARE GAIN)

1300bps
(GM IMPROVEMENT)

kissan



>10%
CAGR (2013–16)*

500bps
(SHARE GAIN)

450bps
(GM IMPROVEMENT)

Knorr





>15%
CAGR (2013–16)*

800bps
(SHARE GAIN)

900bps
(GM IMPROVEMENT)

** Financial Year*

MOST IMPORTANTLY, SUSTAINED GROWTH FROM NEW USERS

Unilever

kissan



+200bps
DELHI

+300bps
MUMBAI

kissan



+300bps
MUMBAI

+300bps
PHH*

Knorr



+400bps
DELHI

+450bps
PHH*

MAT May IMRB

*Punjab, Haryana and Hills

THE STARTING POINT OF THESE RESULTS

Unlocking RELEVANCE





Driving PENETRATION



THE STARTING POINT OF THESE RESULTS

Unlocking RELEVANCE





Driving PENETRATION



UNLOCKING RELEVANCE

WINNING PROPOSITION



HARNESSING NON TV



PARTNERSHIPS POPULAR CULTURE



BUILD BRAND LOVE



UNLOCKING RELEVANCE

WINNING PROPOSITION



Knorr Soup
Chhoti bhook
15sec
Hindi
Manchow soup
05 11 14

UNLOCKING RELEVANCE

WINNING PROPOSITION



KISSAN KETCHUP
35 sec
11 12 14

UNLOCKING RELEVANCE

HARNESSING NON TV



LEVERAGING OUTDOOR



PRINT INNOVATION



MADE FOR WEB CONTENT



UNLOCKING RELEVANCE

PARTNERSHIPS
POPULAR CULTURE



JOSHUA TREE

Pizza Hut

20 sec
26th May 2015

UNLOCKING RELEVANCE

PARTNERSHIPS POPULAR CULTURE



UCN : 66600601
BRAND : KNORR CUP A SOUP
TITLE : KCS SHAMITABH 25
DURATION : 25
LANGUAGE : HINDI

UNLOCKING RELEVANCE

BUILD BRAND LOVE



THE STARTING POINT OF THESE RESULTS

Unlocking RELEVANCE





Driving PENETRATION



DRIVING PENETRATION

ACCESSIBILITY



AVAILABILITY



SAMPLING



NEW OFFERINGS ON CORE



ACCESS PACKS ACROSS ALL CORE CATEGORIES

KETCHUP



JAMS



SOUPS



KEY ACTIONS

- LED COMMUNICATION WITH ACCESS PACKS
- USED FREQUENCY MEDIUMS TO REMIND REPEATEDLY
- "COST TOO MUCH" ATTRIBUTE SCORES MOVED DOWN

Access Packs grown at a CAGR of 40% over the last 3 years

DISTRIBUTION RAMP UP ACROSS ALL CORE CATEGORIES



KETCHUP



JAMS



SOUPS

Coverage of penetration packs > DOUBLED in last 3 years

SAMPLING SPEND DOUBLED IN LAST 3 YEARS



NEW USERS RECRUITED THROUGH STRENGTHENED PORTFOLIO

BLAST RANGE



MANGO JAM



TWIST



SOUPS



THE TRENDS WE SEE INFLUENCING OUR FUTURE...



BRAVE NEW WORLDS

GROWING EXPOSURE TO INTERNATIONAL CUISINES



OUT OF HOME TO IN HOME

EATING OUT IS IMPACTING IN- HOME COOKING



NATURAL AND PROVENANCE

CONSUMERS ARE INCREASINGLY SEEKING ASSURANCE AND MOVING TO TRUSTED CHOICES



NUTRITION AND WELLNESS

FORTIFICATION AND BETTER FOR YOU FOODS ARE ON THE RISE



EVOLVING CONSUMERS

CHANGING TREND IN ASPIRATIONS, DRIVERS, MEDIA HABITS AND CONSUMPTION

TO SUM IT UP



ENTERED NEW SPACES



FUTURE TRENDS



ADJACENCIES HAVE FIRED



CORE IS SECURE



HEADROOM TO GROW PENETRATION

THANK YOU



BON APETIT



HEART OF HOMECARE

HOME CARE

2015 HOMECARE PERFORMANCE HIGHLIGHTS

COMPETITIVE, PROFITABLE, SUSTAINABLE GROWTHS

Rs 9600 Cr

Business

30%

Of HUL's Size

No 1 Position

In All Key Sub Categories

350 bps

Delta Margin 2012-15

9/10 Indians

Our Consumer Franchise

HOME CARE : SUB CATEGORIES AND BRANDS

FABRIC CLEANSING & CARE

Active Wheel

Rin

Sunlight

Surf excel

Comfort Fabric Conditioner

DISHWASH

Vim

WATER PURIFICATION

Hindustan Unilever pureit

SURFACE CARE

Domex

Cif

HOMECARE : KEY THRUSTS



PREMIUMISATION IN LAUNDRY



SOCIALLY RESPONSIBLE AND
ASPIRATIONAL BRANDS



MARKET DEVELOPMENT ON
CATEGORIES OF THE FUTURE



MARGIN IMPROVEMENT
IN A VUCA ENVIRONMENT

HOMECARE 2016 : KEY THRUSTS



PREMIUMISATION IN LAUNDRY

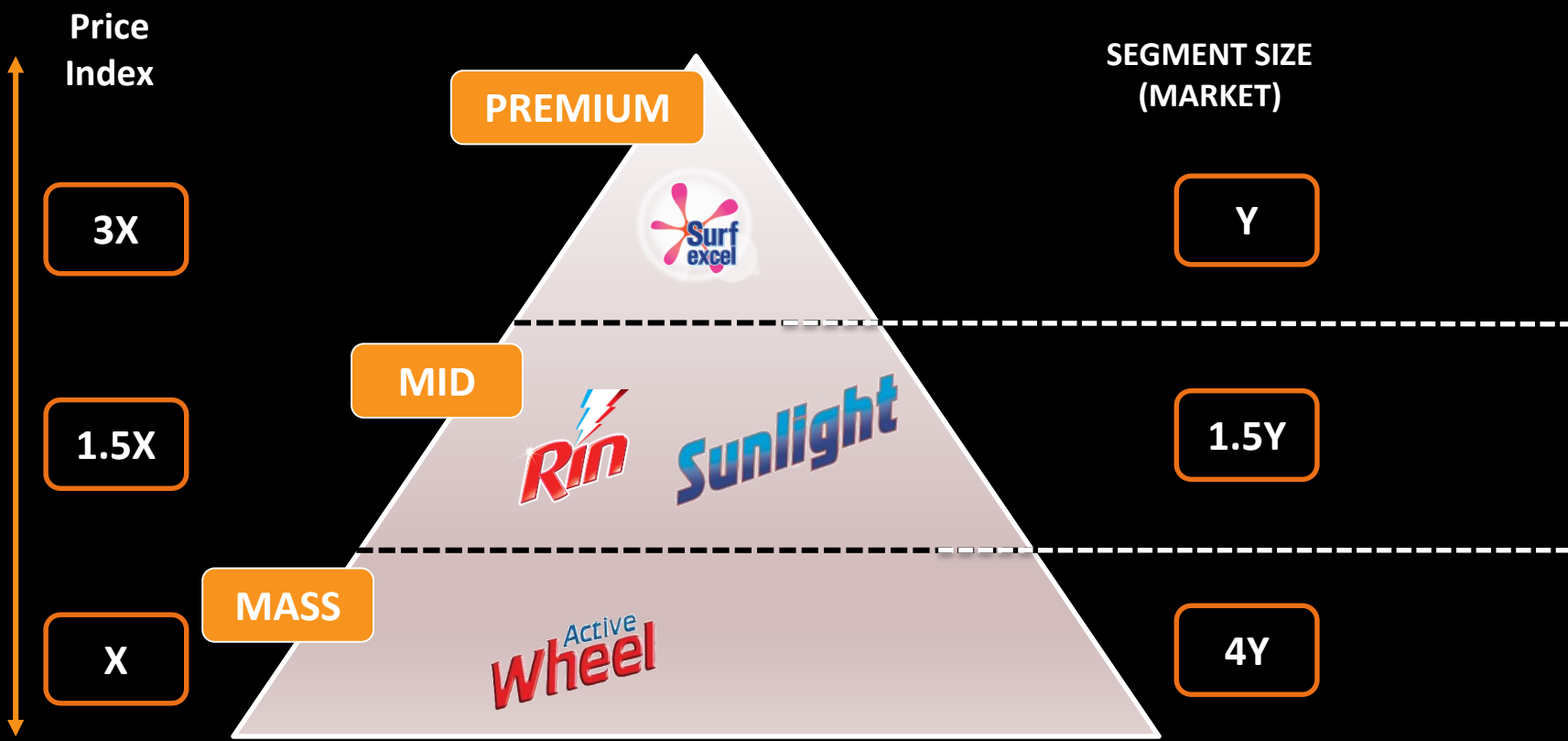
LAUNDRY PORTFOLIO STRADDLES THE PYRAMID



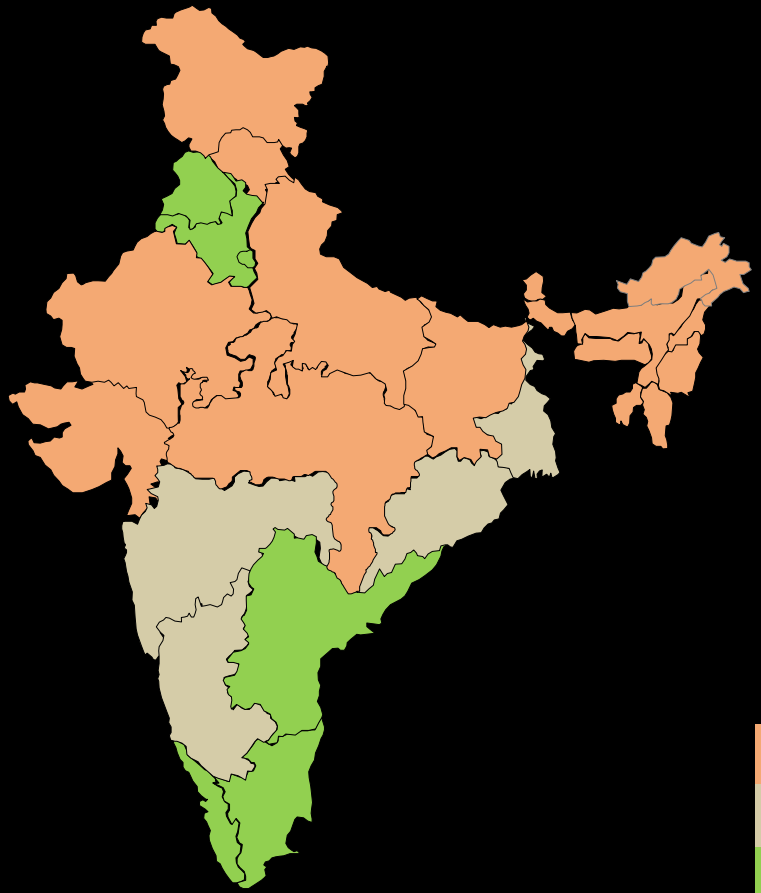
More Benefits

Rising Income

OPPORTUNITY FOR UPGRADATION HIGH



INVESTING TO WIN IN MANY INDIAS





HIGH MASS

MEDIUM MASS

LOW MASS

Approximate Representation of Segment and Opportunities

Disproportionate investment behind the right brand in specific geographies leads to differential results

UNLOCKING PREMIUMISATION

MAKING SURF EXCEL MORE RELEVANT

Highest Brand Equity brand in India

Low Monthly Penetration

Awareness through Communication



"Outstanding" assets

Access through Distribution



Focus on building access to Surf Excel

HOMECARE 2016 : KEY THRUSTS



SOCIALLY RESPONSIBLE AND ASPIRATIONAL BRANDS

BUILDING ENGAGEMENT PLATFORMS








Surf
excel
Presents
#ReadyForLife

HOMECARE 2016 : KEY THRUSTS



MARKET DEVELOPMENT ON CATEGORIES OF THE FUTURE

LEADING POSITIONS IN CATEGORIES OF FUTURE

CRAFTING GREAT BRAND EXPERIENCES



MATIC POWDERS



FABRIC CONDITIONER



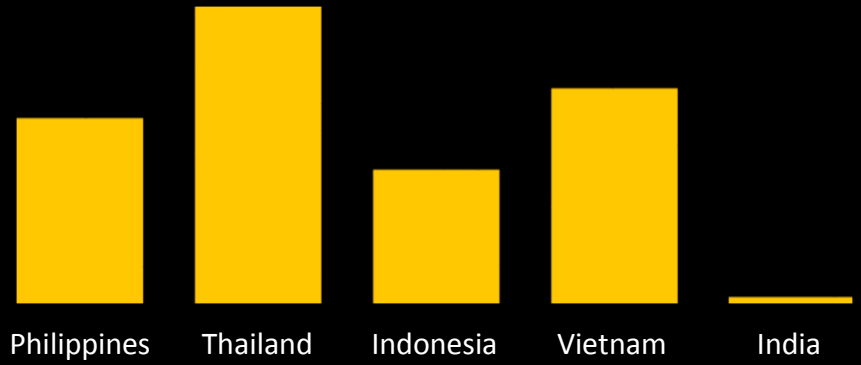
LIQUID DETERGENT



DISHWASH LIQUIDS

FABRIC CONDITIONERS : MASSIVE OPPORTUNITY

FabCon as % of FabClean (Market)



Education Based Sampling
At Scale





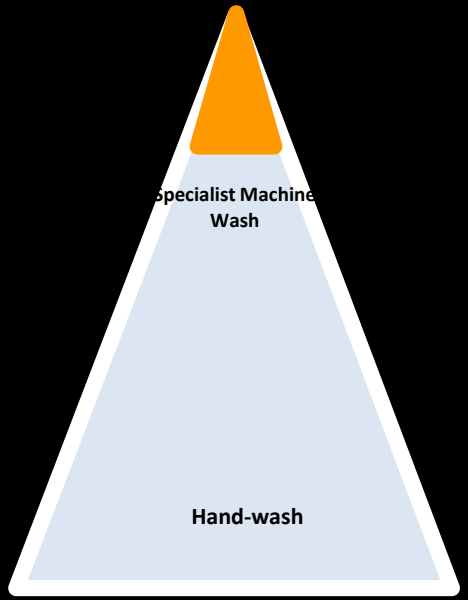


HOME-TO-HOME

Point of Sale

SURF EXCEL MATIC

CREATING THE CATEGORY OF THE MACHING SPECIALIST



Immense Potential to Upgrade from Premium Powders to machine Specialists





ALL INDIA

17 mn Machine Households –
(21% Urban penetration)

1.5 Mn Matic Households
(9 % penetration)

Home 2 Home

MT POS Promoters

SURF EXCEL MATIC

INNOVATION - MATIC LIQUID



Format breakthrough



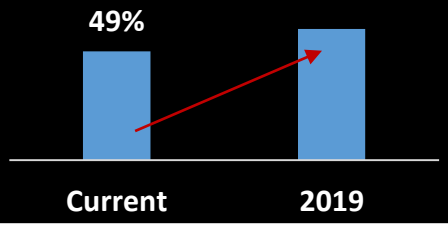

SURF EXCEL MATIC LIQUID
100% TOUGH STAIN REMOVAL IN MACHINES
NEW TOP LOAD
NEW FRONT LOAD
Surf excel matic
Surf excel matic
*Based on lab test on red chutney, chocolate pastry stain on polyester fabric.

DISH OPPORTUNITY

Rural Category Building



UTC rural penetration



Large group of non-user homes

Liquids Category

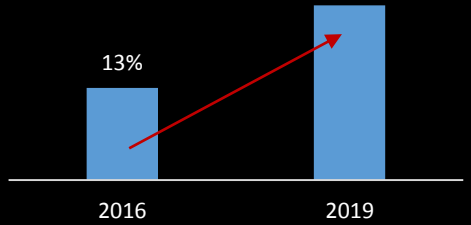






Sampling with scale

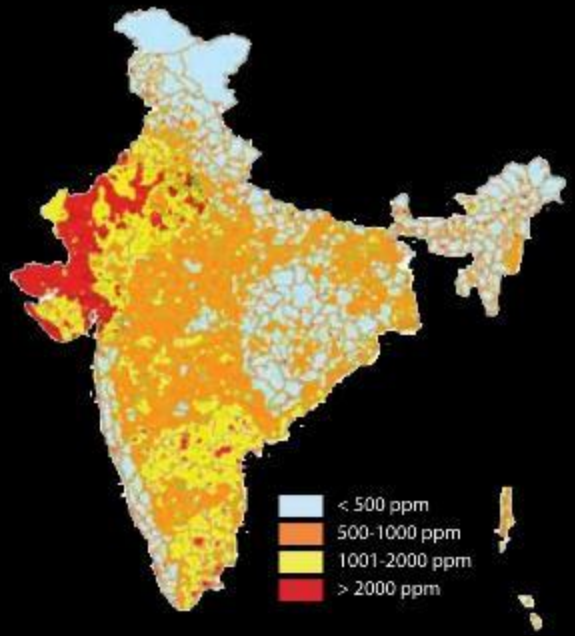
LSM 5+ Liquid HH% AI U



Recommended by Multiple Utensil Manufacturers

PUREIT – A BASIC NEED

WATER QUALITY IN INDIA IS CHANGING



20%

Low Penetration of Water Purifiers in India

Falling Ground Water table leading to sharp increase in Water Saltiness

LEVERAGING PORTFOLIO PLAY





STRONG CORE

Segment Leadership
in Gravity Purifiers

BIGGER & BOLDER PORTFOLIO

Innovations Launched in Premium
& Low Price RO Purifiers

EDUCATING CONSUMERS WITH SCALE

REACHING OUT TO PROSPECTIVE CONSUMERS DIRECTLY

X

Mn Contacts

2014

2.5X

Mn Contacts

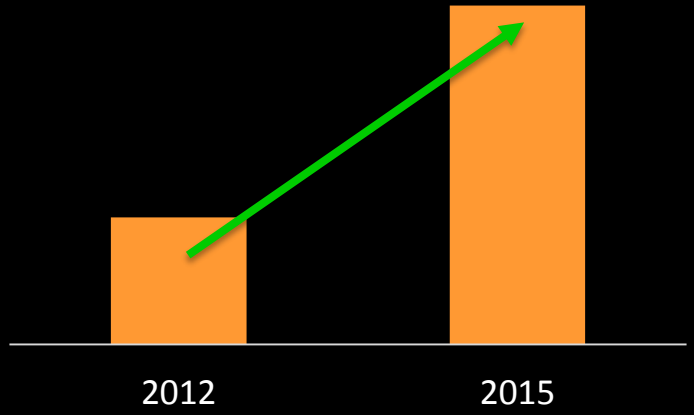
2016

HOMECARE 2016 : KEY THRUSTS



MARGIN IMPROVEMENT
IN A VUCA ENVIRONMENT

350 bps improvement in Margin



DRIVING THE RIGHT MIX

Mix improved y-o-y

Max the mix initiatives – constantly challenging status quo

Build Bridge and Accessible packs



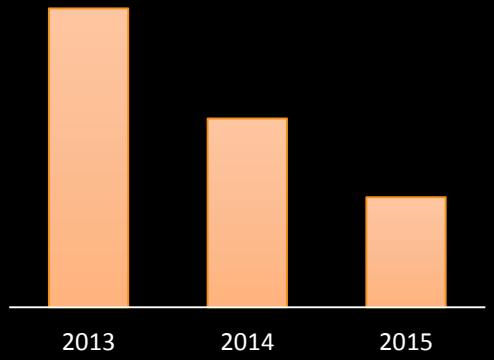
Delist/Price up low-margin packs



MANAGING VOLATILITY

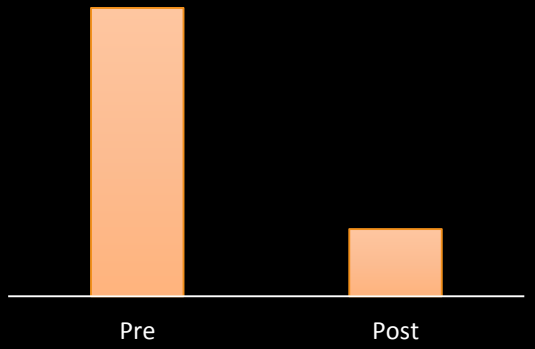
Lower Stock covers

FG Stock - 8% reduction in DOH



Technology to reduce Lead Time

80% reduction in Network Lead time



300+ Pricing Networks with average Lead Time **15 days**

HOMECARE : KEY THRUSTS



PREMIUMISATION IN LAUNDRY



SOCIALLY RESPONSIBLE AND ASPIRATIONAL BRANDS



MARKET DEVELOPMENT ON CATEGORIES OF THE FUTURE



MARGIN IMPROVEMENT IN A VUCA ENVIRONMENT

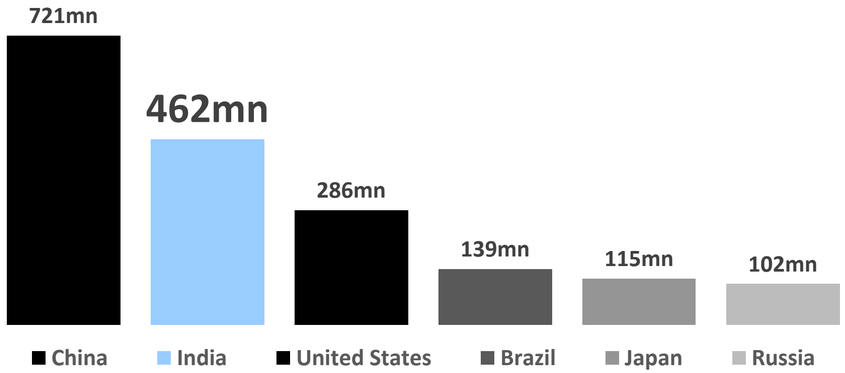

HEART OF HOMECARE

Marketing in a

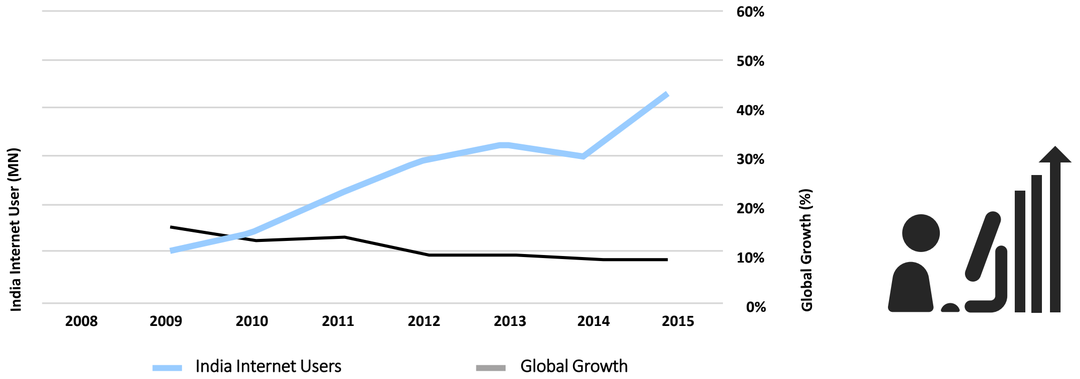
Connected World

India: A Unique Market

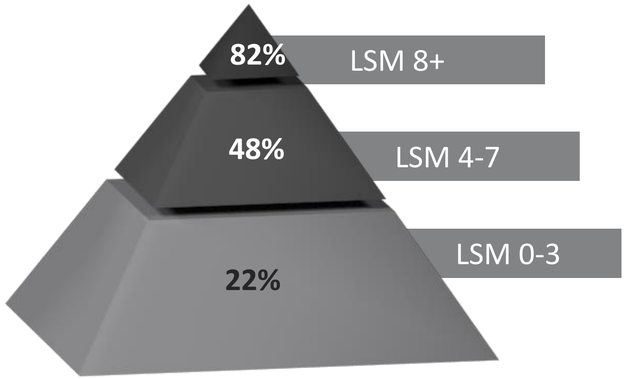
India #2 country behind China



India growing at 44% vs. rest of the world at 9%

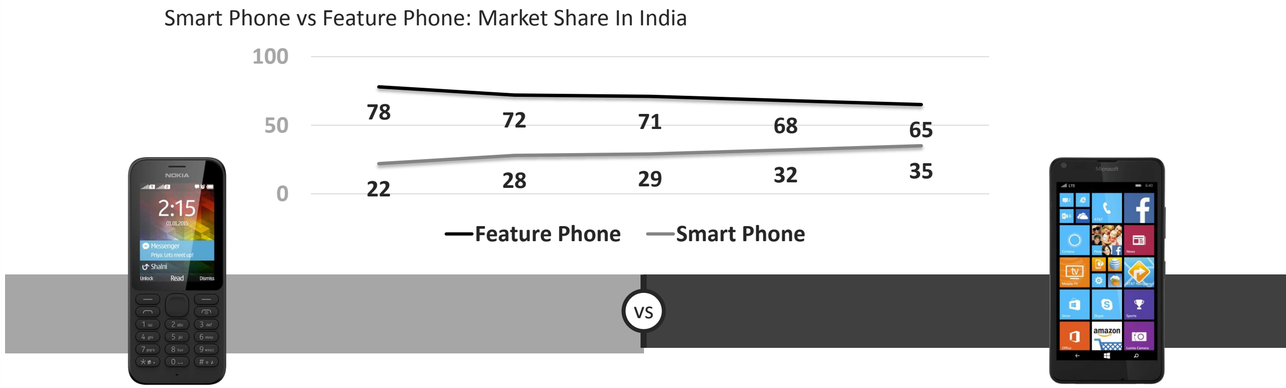


Internet usage across the pyramid



Sources: www.internetlivestats.com
Mary Meeker Report, IDC India

Large feature & growing smartphone segments



Enablers To Win in India

Pioneer and Experiment

कनसजूश टेसन
1800300000123
मिस्ड कॉल लगाओ,
मुफ़्त मनोरंजन पाओ.

LAKMÉ MAKEUP PRO

Deploy with Scale

Vaseline, NEW Fair & Lovely, AXE, Sunlight, BRU, Kwality Wall's, Cif, Magnum, Surf excel, Dove, Lipton, Domex, Taaza, Pure it, Red Label, ayush therapy, CLINIC PLUS, kissan, Knorr, vim, Pears, Rexona, LAKMÉ, TRESemmé, POND'S, St. Ives, Comfort, Pepsodent, indulekha, LUX

Build Partner Eco-System

amazon.com
Google
facebook
NYKAA.COM

Content & Technology partners

Pillars to win in a connected world

INTERNET





Win across micro moments of search



Lead Trends



Harness ecommerce

MOBILE





Entertain and connect via voice

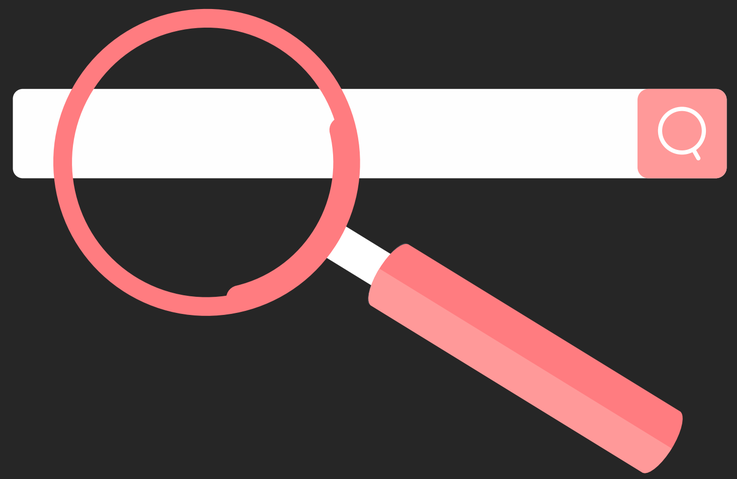


Democratize video

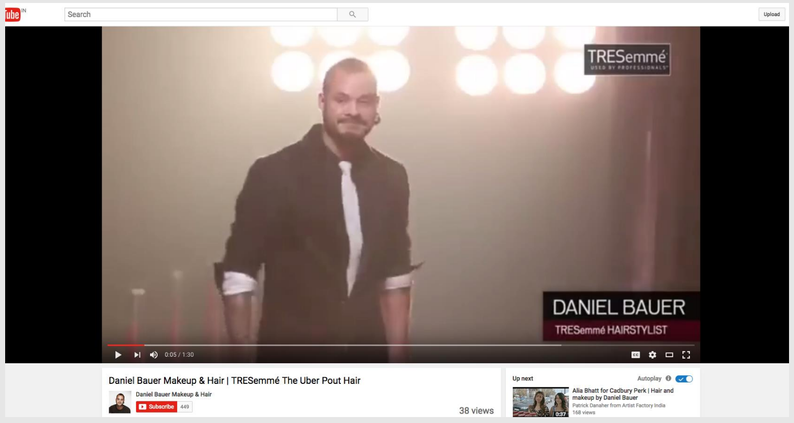


Build rewarding relationships

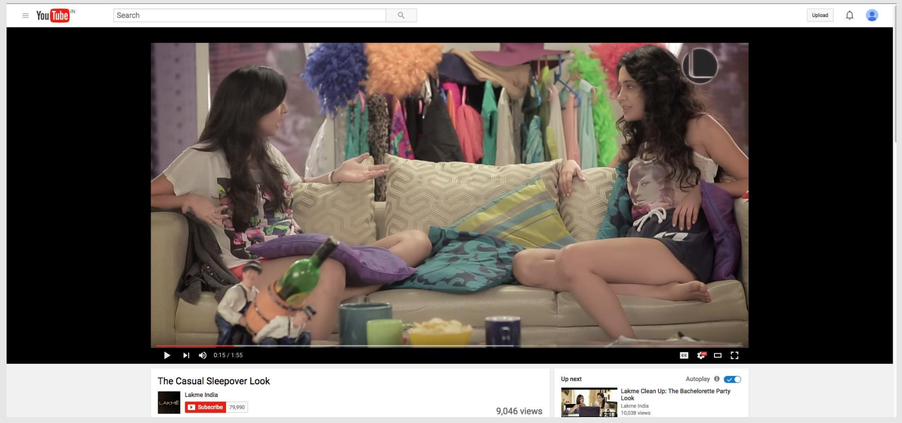
Winning on search



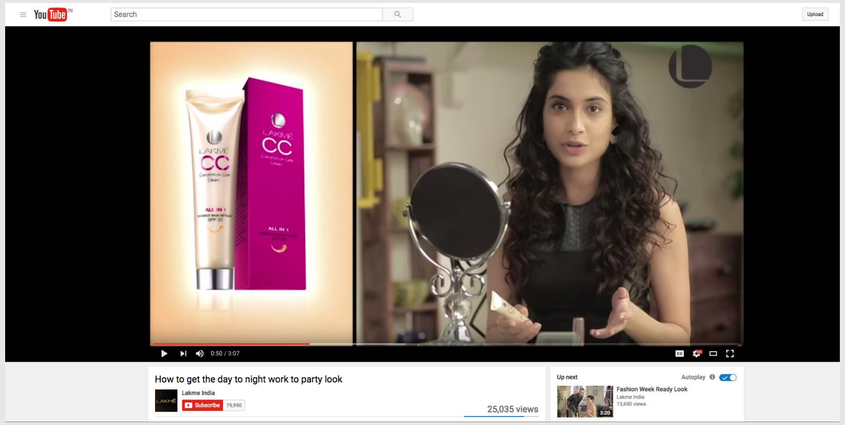
It’s about pull not push



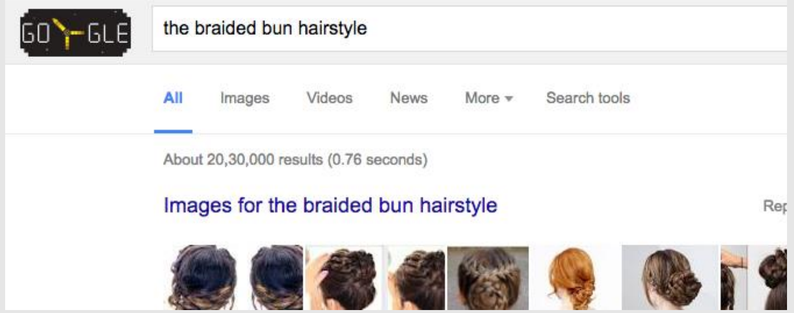
39 Views



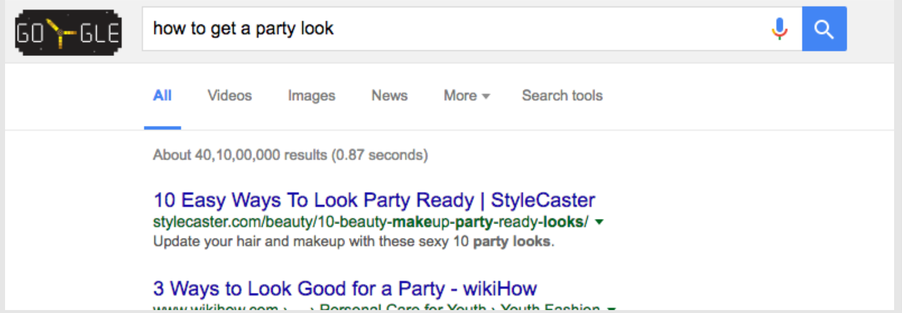
9142 Views



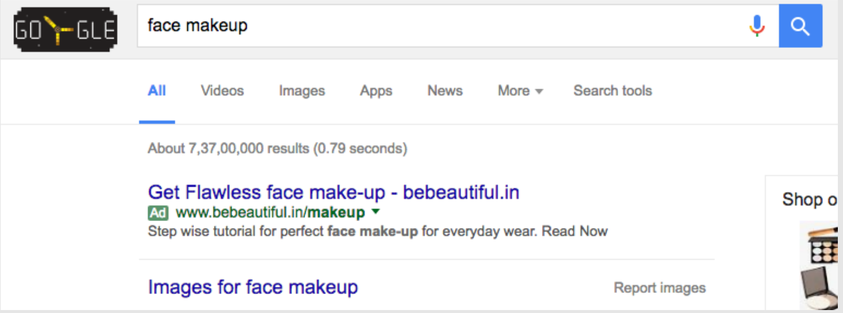
25293 Views



2.2M Searches



250k annual Searches

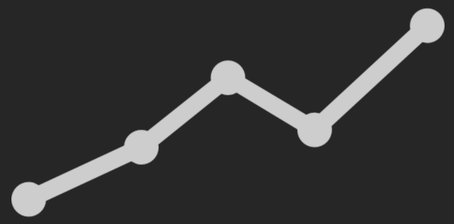


1.8M Searches

*Source Info: Google

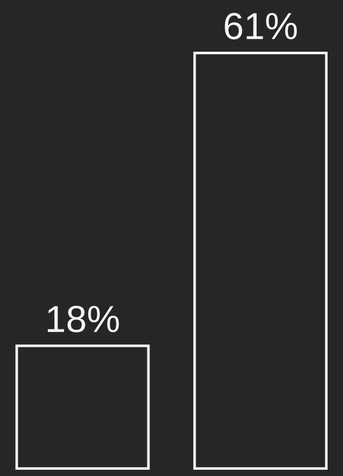
Be the Wikipedia of Personal Care





360M Beauty searches annually growing at **44%**





Dramatic rise in mobile searches vs **2013**

THE VISION

Be the **WIKIPEDIA Of PC** with Unilever brands serving **70%** of all beauty searches organically

The Micro-moments of Search



KNOW

- How to use
- Which outfit
- Latest Trends



GO

- To salons



DO

- Experiment
- Use perfectly
- Occasion led looks



BUY

- A specific brand
- Best product
- The complete look

In Depth Understanding of Searches



Skin

18M monthly

12M unbranded

2.6M branded

3.5M irrelevant



Hair

23M monthly

13M unbranded

2M branded

8M irrelevant



Make-up

12M monthly

5M unbranded

4.5M branded

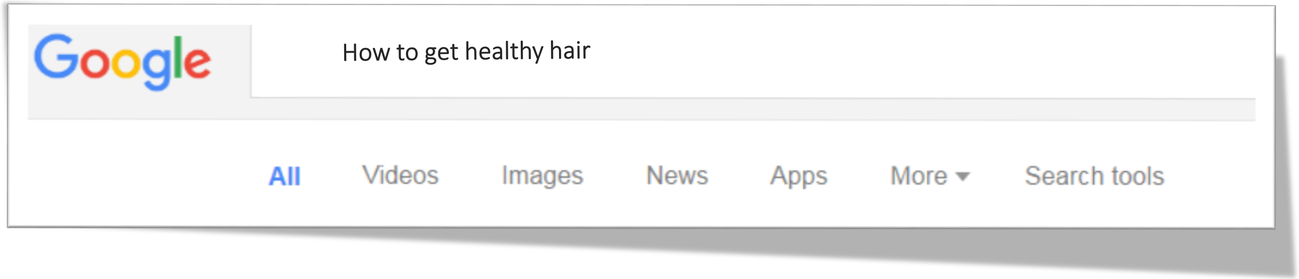
2.5M irrelevant

*Source Info: Google
*Internal HUL analysis
Data as of June 2015

Searches Are Surprisingly Basic

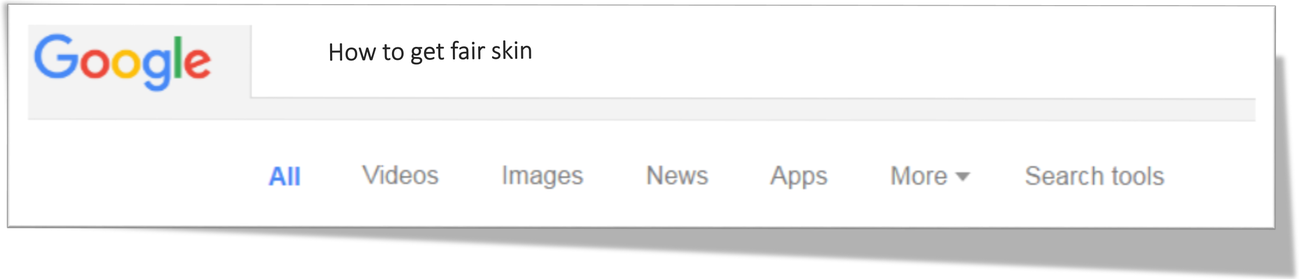


Hair



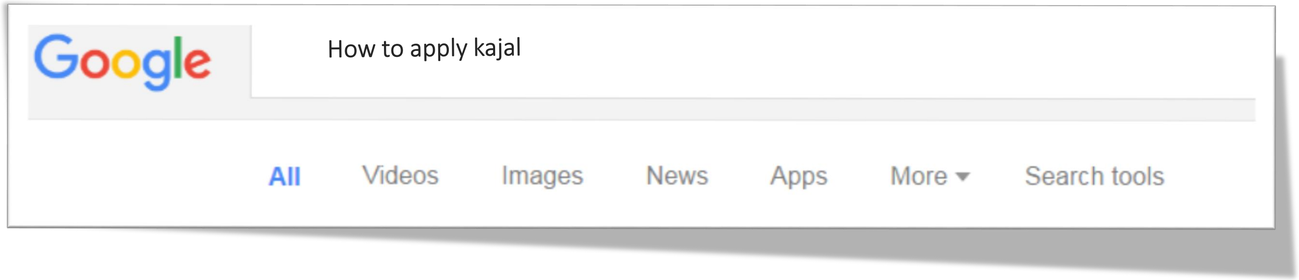


Skin





Make-up



The Beauty Wikipedia

All things SKIN

All things MAKEUP

All things HAIR



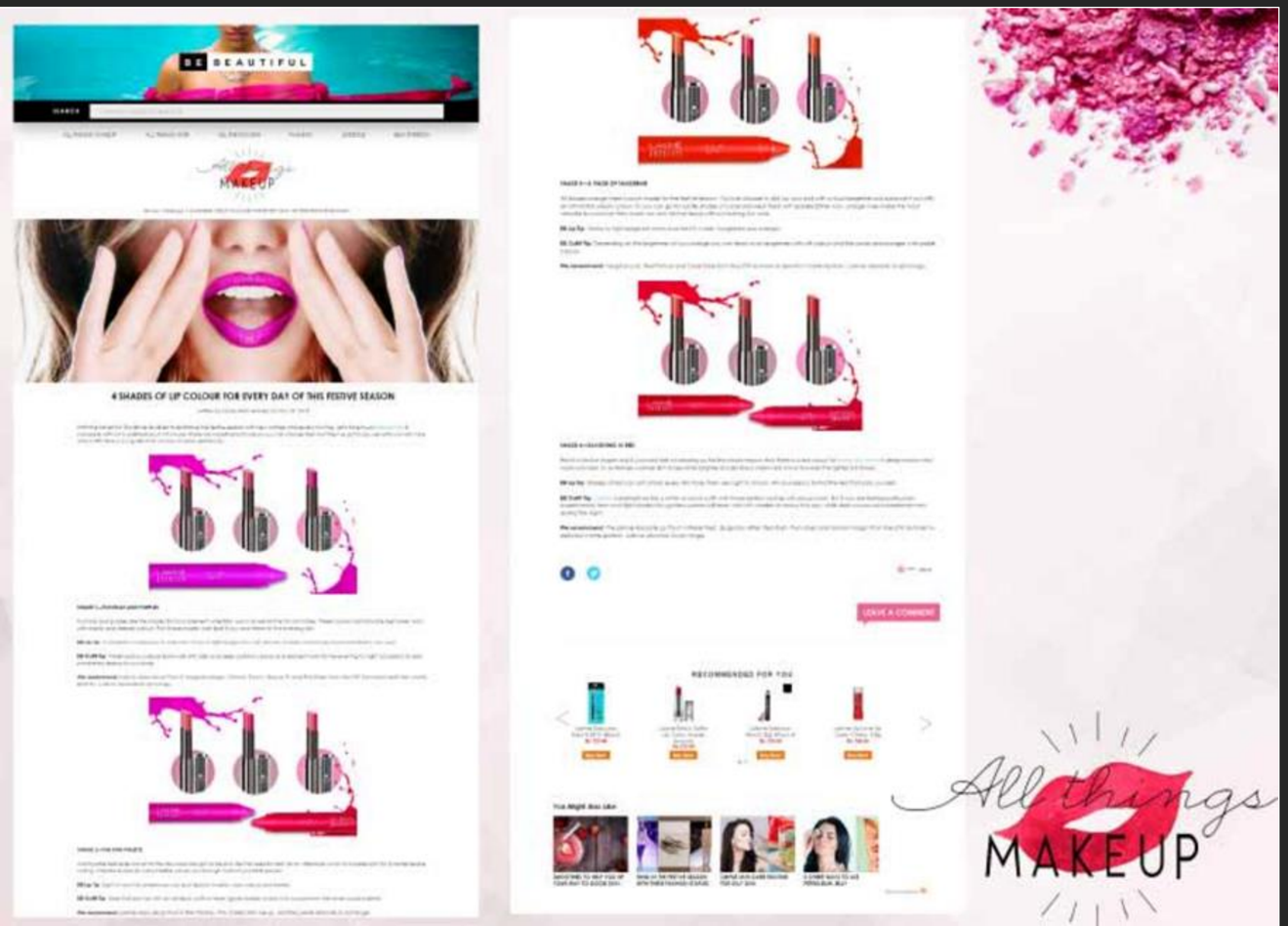
SEARCH TYPE WHAT YOU'RE LOOKING FOR ENGLISH

The Be-Beautiful Ecosystem

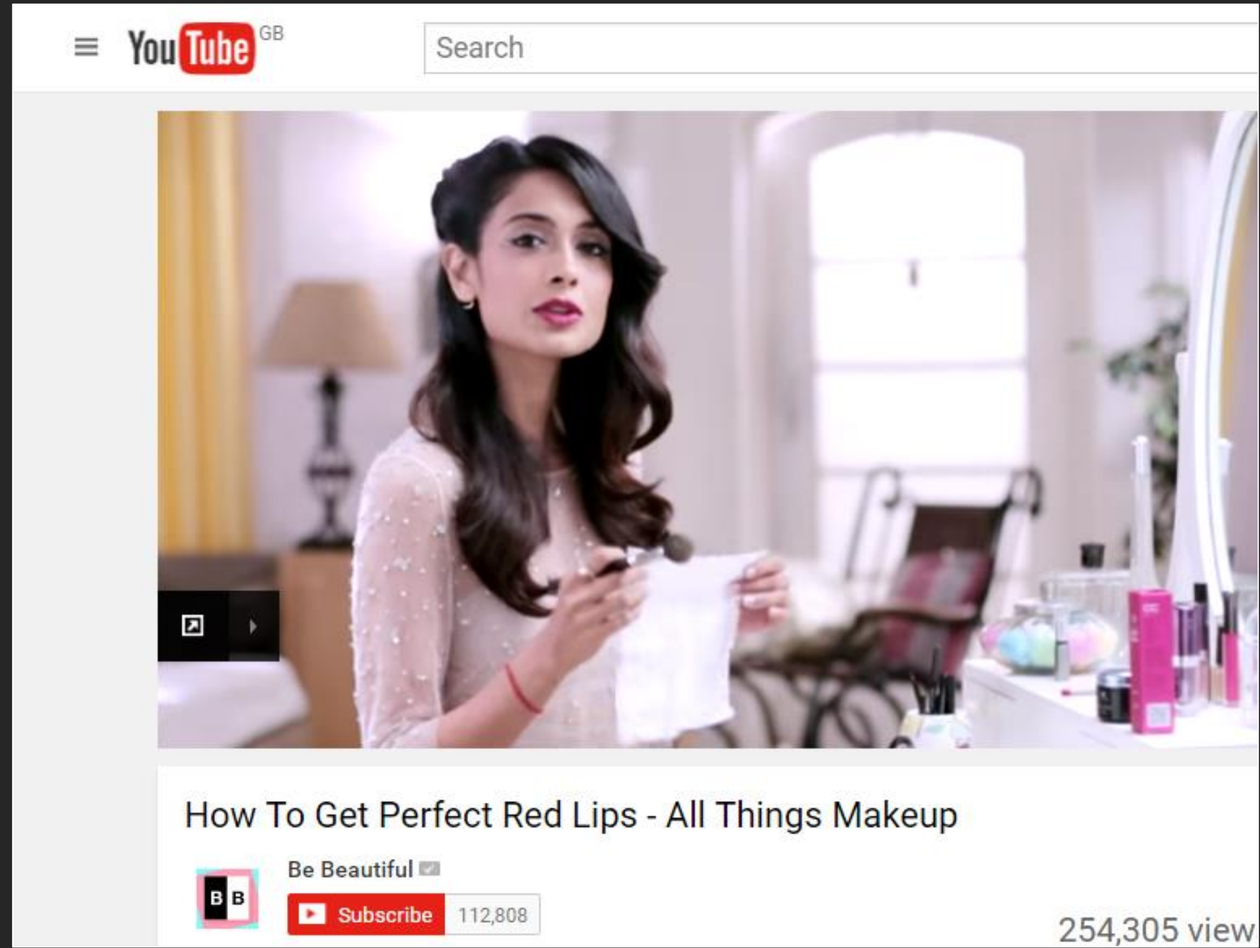


Extensive Text & Video Content

350+ Articles



100+ videos



Covering Regional Languages Too

3M Hindi searches in 2015

42% Growth in language searches



कोरी वालिया और सारा जेन से सीखिए कॉकटेल लुक के गुर

written by Girija Naiksatam on May 03, 2016

हम जानते हैं कि कई दुल्हनें कॉकटेल लुक को 'एक और पार्टी' के रूप में देखती हैं। हो सकता है कि यह सही हो, अगर आपको अब भी दुल्हन की तरह दिखना है तो आपको दिखने में सुन्दर दिखना होगा। इसकी शुरुआत के लिए हमारे पास मेकअप विशेषज्ञ कोरी वालिया के साथ हमारी पसंदीदा बीबी गर्ल सारा जेन भी है जो लक्मे अबसलूट ब्राइडल मेकअप मास्टरक्लास से कॉकटेल लुक का पुनः सृजन करेंगे।



You Might Also Like



BB PICKS—AVIANCE'S NEW HYDRA BALANCE & WHITE INTENSE RANGE



HOW TO DO A FRENCH JUDA HAIRSTYLE



5 WAYS WOMEN CAN IMPROVE THEIR BONE HEALTH



THE ONLY SQUAT ROUTINES YOU NEED TO ADD TO YOUR WORKOUT

Recommended by

படிநிலை 1

பேலெட்டிலிருந்து ஐ ஷேடோ பிரஷில் பழுப்பு ஐ-ஷேடோ பவுடரை எடுத்து, அதை உங்கள் கண் இமை முழுவதும் பூசுங்கள்.



படிநிலை 2

வெளிர்நிற ஷேடைத் தேர்ந்தெடுத்து, அதை பழுப்புடன் கலந்து, உங்கள் கண் இமைகளுக்குக் கீழுள்ள இடம் முழுவதும் பூசுங்கள்.

You Might Also Like



5 HAIRCUT STYLES TO TRY



HOW TO REPAIR DAMAGED HAIR



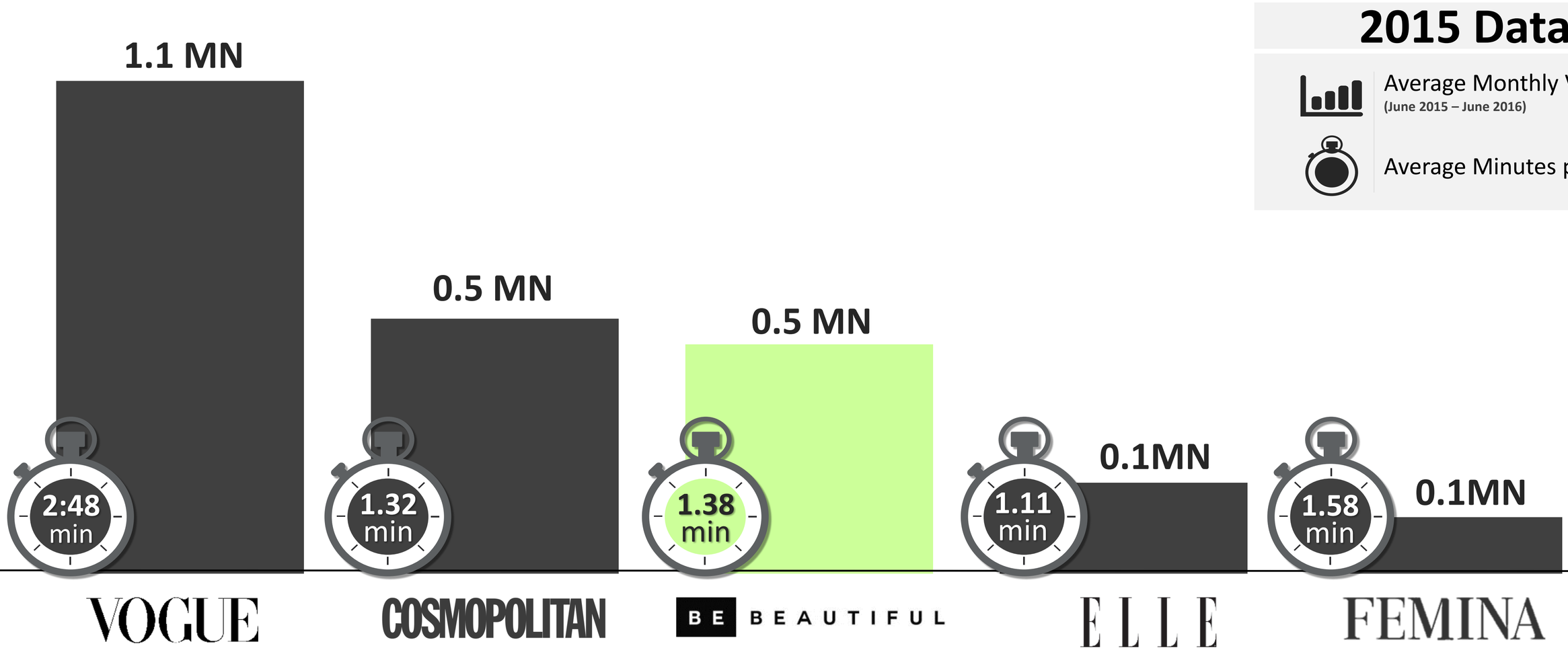
HOW TO GET FAIR SKIN AT HOME



HOW TO MAKE A FACE PACK FOR GLOWING SKIN

*Source Info: Google

Making Be-Beautiful
A Leading Beauty Publisher



*Sourced from a similar web

Helping Our Brands Win On Search



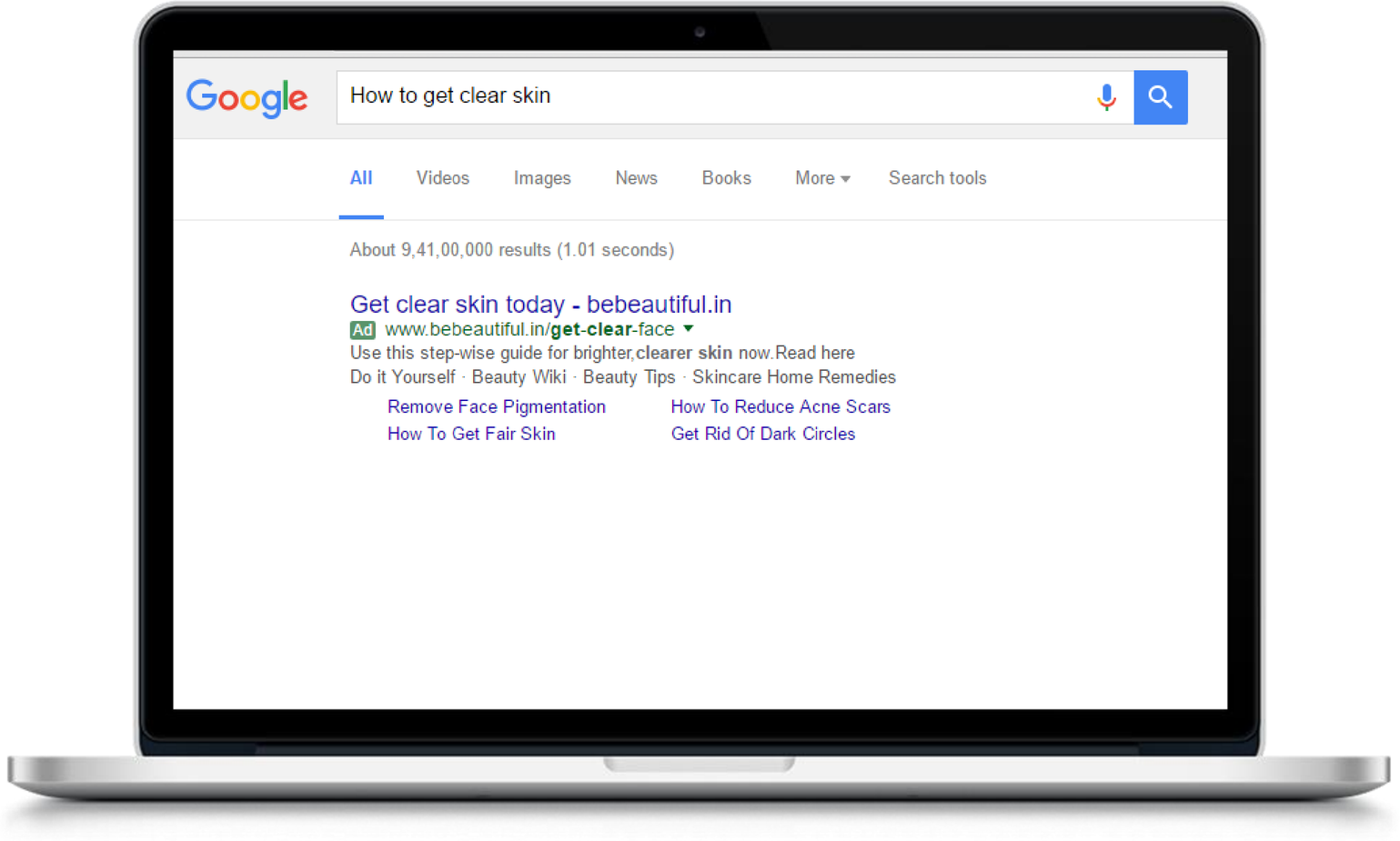
3X CTR vs benchmark



Doubled website traffic to a million **(June 2016)**



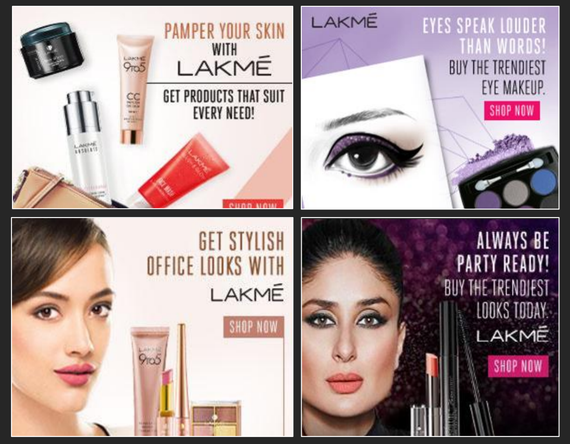
+700bps consideration amongst viewers*



*Google Brand Lift study

Leveraging Be-Beautiful Further

A gateway to a relevant and engaged audience



Defined sharper target audiences

Customized creative for each audience profile

Leading to **10x** better conversion on E-commerce

*Sourced : Google

Leading Trends



We Are Trend Leaders In New Segments



in all these segments

Fabric Conditioner	BB Cream / CC Cream	Green Tea	Hair Conditioner
			

Pioneer Beauty Trends at Lakmé Fashion Week

LAKMÉ FASHION WEEK
IMG | Reliance
LYF









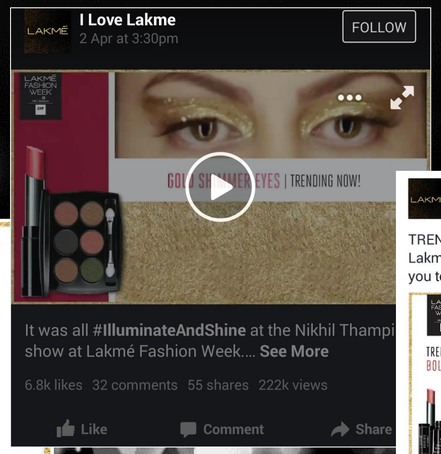


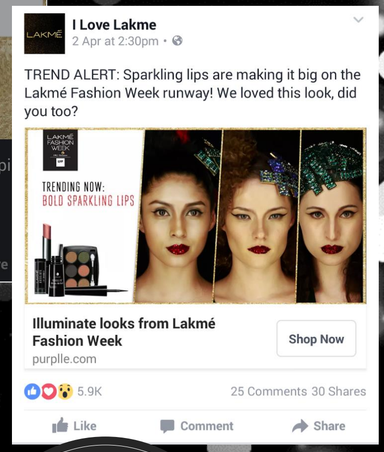


Amplified To Millions Real time









50%

Unique Reach of TG in 5 days

>5X

Engagement rate vs norm

+710bps

Increase in LFW awareness on FB

+1310bps

Increase in Purchase interest on Twitter among those engaged



FAL
Beauty on duty



8.98M Views

8% increase in awareness among viewers (“best-in-class” as per India benchmarks*)

*Source- Google Brand Lift study

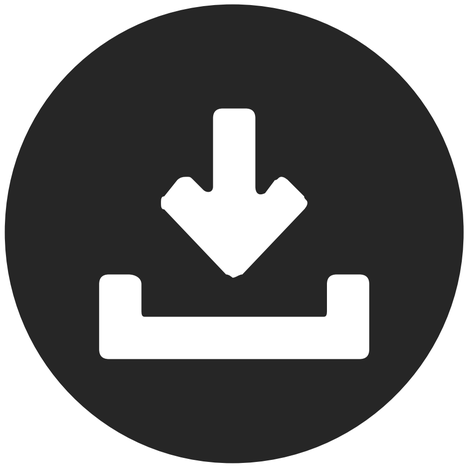

Fair
#BEAUTY

Lakmé Make-up Pro
India’s 1st Real Time Make-Up App



- Revolutionizing Make-up Trial
- Choose from 100+ pro-stylist looks
- Shop the look on the app
- 1.8M downloads in a year

Status in 2015





Jagran
jagran.com
PRESENTS
INDIAN digital MEDIA AWARDS 2016
CO-POWERED BY
manoramaonline you're home
ABP LIVE
abplive.in

KYOORIUS CREATIVE AWARDS





Make-up Pro 2.0





TRENDS & INSPIRATION



SHRADDHA KAPOOR'S SAPPHIRE SHIMMER LOOK

Shraddha Kapoor's look was all about Illuminate, Shine and Shimmer at the Lakme Fashion Week! Read more about how to sport her divalicious spunk st...



TRENDS & INSPIRATION

Teal Tale

This summer sport blue! Shraddha's teal eye game had us craving the colour throughout this season. It was pure magic and mayhem on the runway. The vivid blue shade on her lids, made her eyes look much brighter and more defined.



Lavender Love

The look was completed with a shimm
surprise! Her lips were a lavender pink shimmer to go with the eccentric tint on her eyes.

TRY THE LOOK

LIPS



THE

PRODUCTS



LAKMÉ ABSOLUTE SCULPT NEW HI DEFINITION MATTE LIPSTICK_MAROON MAGIC

TRY THE LOOK

Harness E-Commerce



E-commerce in India: An Exploding Opportunity

220M online shoppers by 2020

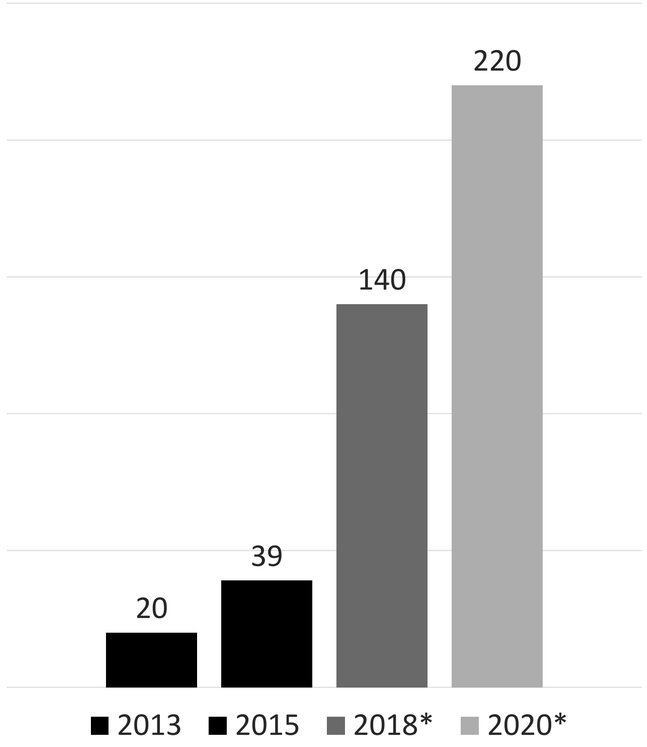


Figure 3. Online shoppers (in million) of internet user in India (includes only B2C e-tail excluding online travel and classifieds)

*Google Bain Study 2015

Spend to increase 5X vs 2015

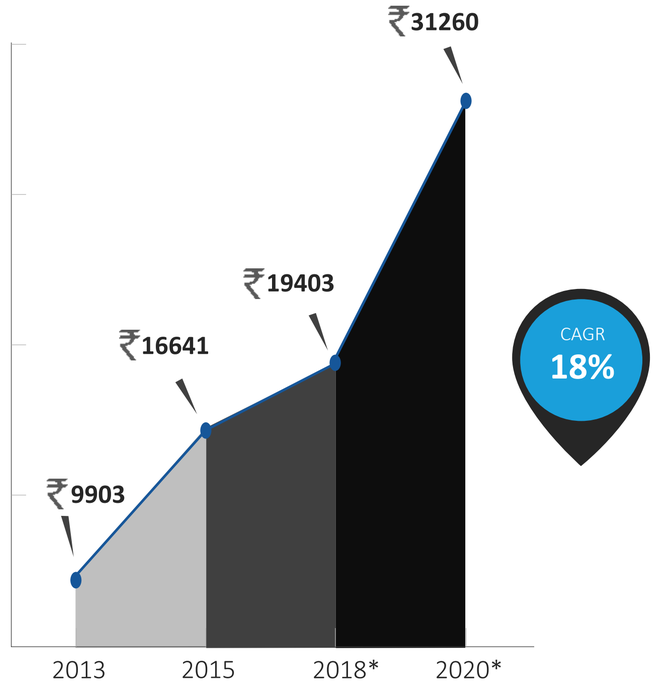
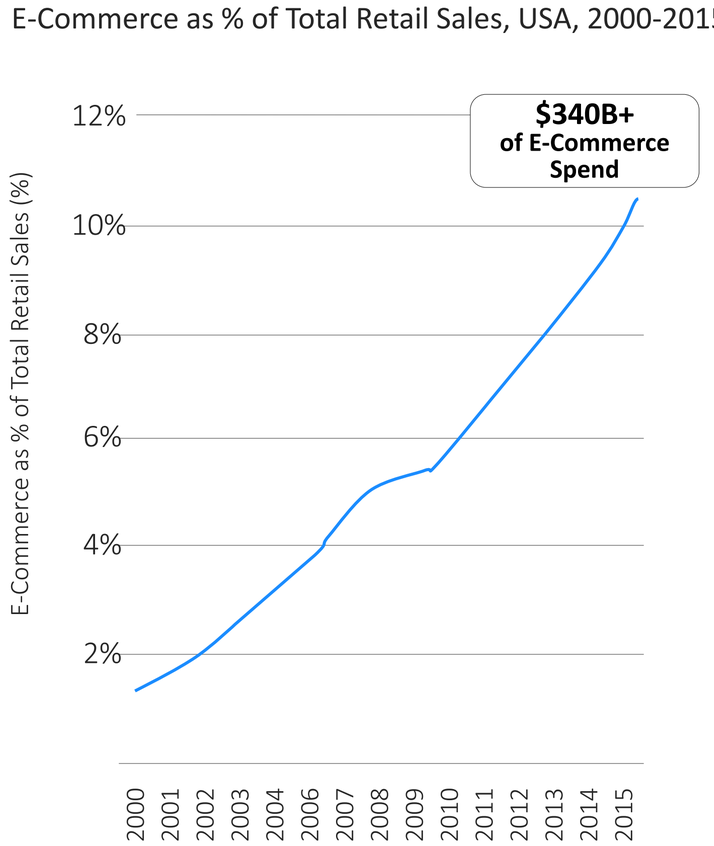


Figure 4. Average spend per online shopper in India (includes B2C a-tail, online travel classifieds)

*Google Bain Study 2015

Can be >10% of retail like in USA



*Mary Meeker Internet trends report

Planning For The Future



MT Enablers

2000



Modern Trade Team



MT Supply Chain



Marketing Excellence



E-Com Enablers

2015



Fit to Win eCom Team



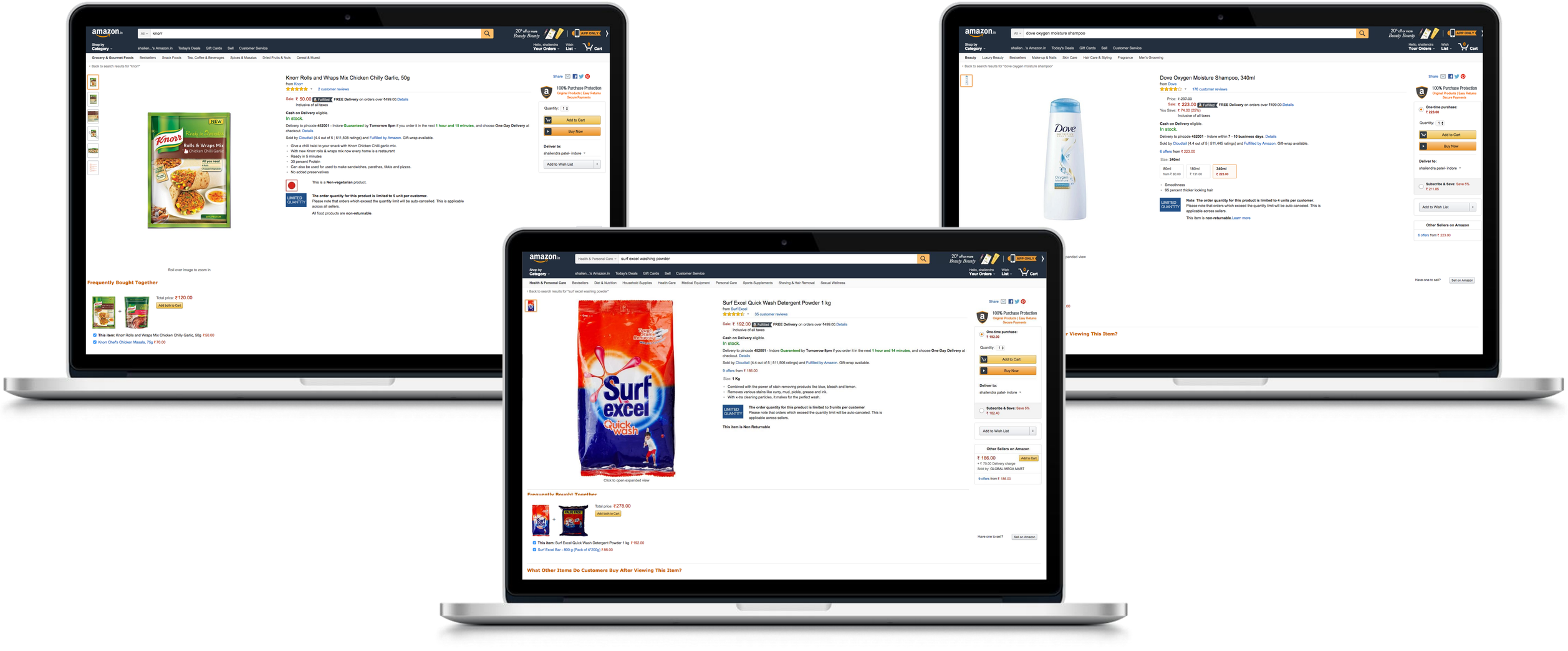
SC 2.0 Fit for eCom



Marketing Excellence

Marketing Excellence

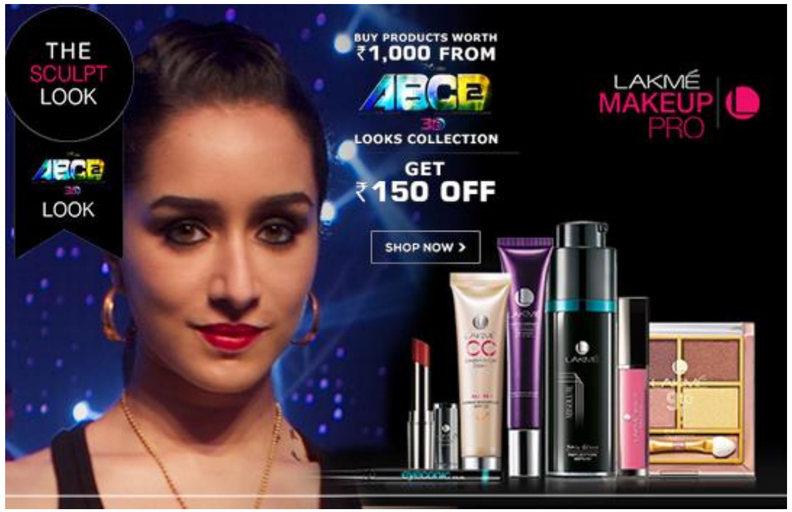
Improve content available online



Marketing Excellence

The Shop The Look Model

Pop Culture



Bollywood movie Association

4X conversions

4X Increase in AOV

Lakmé Fashion Week

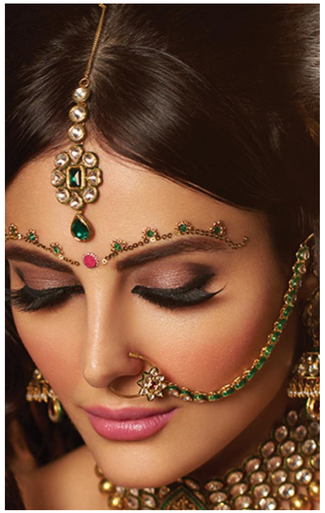


LFW Online Store

25X conversions

1.6X Increase in AOV

The Bridal Occasion





Online Bridal Store

12X conversions

1.6X Increase in AOV


#SHOPTHELOOK

Marketing Excellence

Destination Stores

Tea & Coffee Store



1.4X
jump in offtakes

Valentine Day activation



+205bps
share delta for PC

Home care store



6X jump in laundry and dishwash sales

Our E-commerce Business is Share & Profit Accretive



E-COM



MT



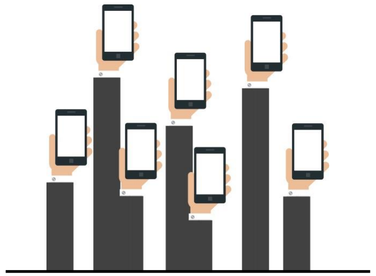
GT

Mobile Marketing



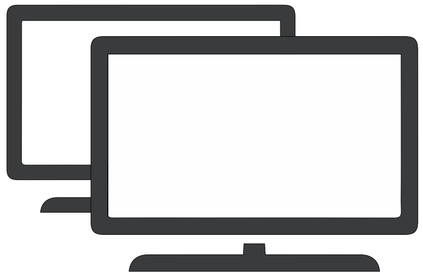
Mobile Landscape

Mobile Penetration



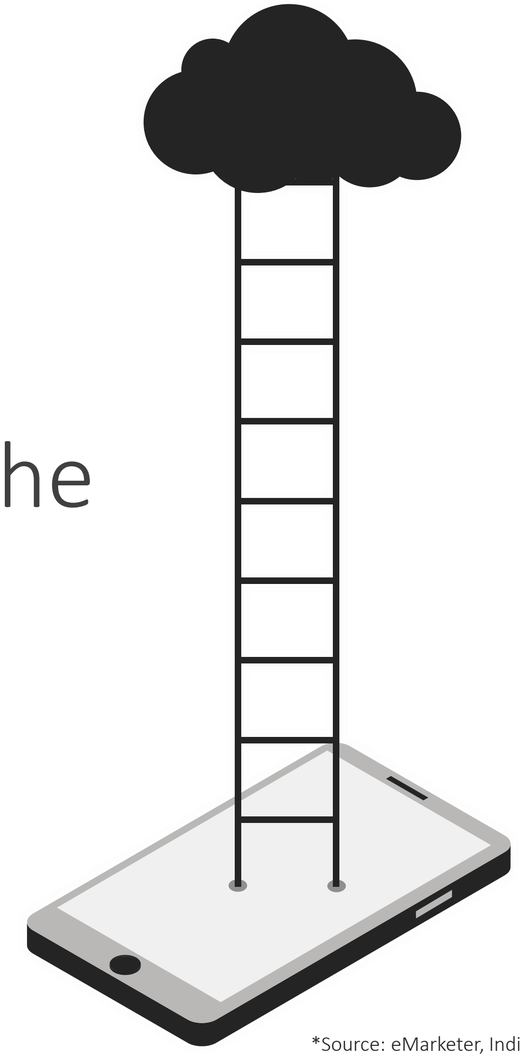
81%

TV Penetration



59%

Mobile is **the** medium with the widest reach



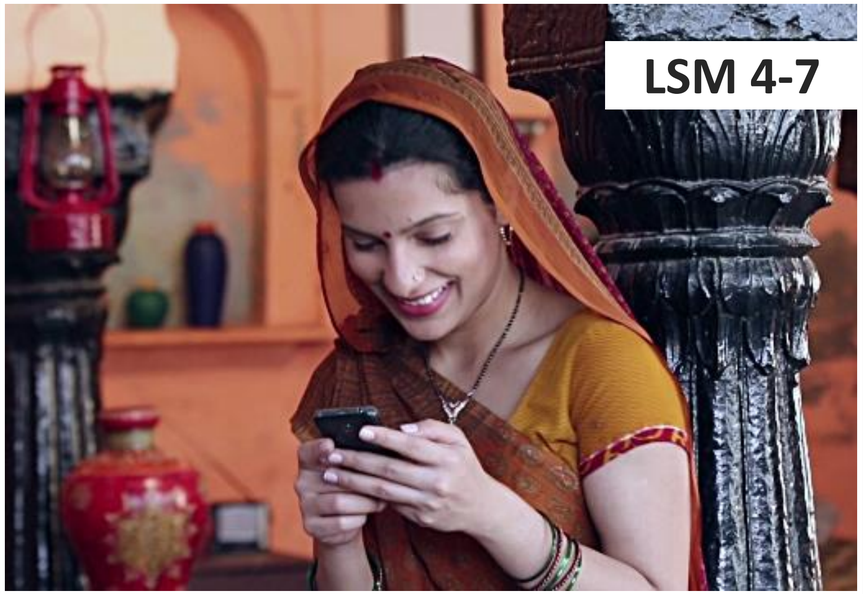
*Source: eMarketer, India Data

Diverse Consumer Base and Needs



Feature phone Users
No Data Usage, talk-time starved

Voice is the big driver



Low end Smartphone Users
Restrictive Data Usage

Democratize Video



High end Smartphone Users
No restriction in usage, WiFi Access

Build rewarding relationships

*Source: Primary research

Diverse Portfolio of brands to Address Each Segment



LSM **0-3**

कनक्शन टेंशन
1800300000123
मिस्ड कॉल लगाओ, मुफ़्त मनोरंजन पाओ.

Active Wheel
लो कर लो बात



LSM **4-7**

Rin
CAREER READY ACADEMY

KRISPY
Entertainment ka pocket money



LSM **8+**

TRESemmé
USED BY PROFESSIONALS

LAKMÉ
MAKEUP PRO


कनसजूरा टेसन
1800300000123
मिस्ड कॉल लगाओ, मुफ़्त मनोरंजन पाओ.

Targeted to the mass end of the spectrum

Voice based, solving an unmet consumer need

43 MN
Total Subscribers

3 MN
Active Subs. per/month

30 Min
Avg. Engagement

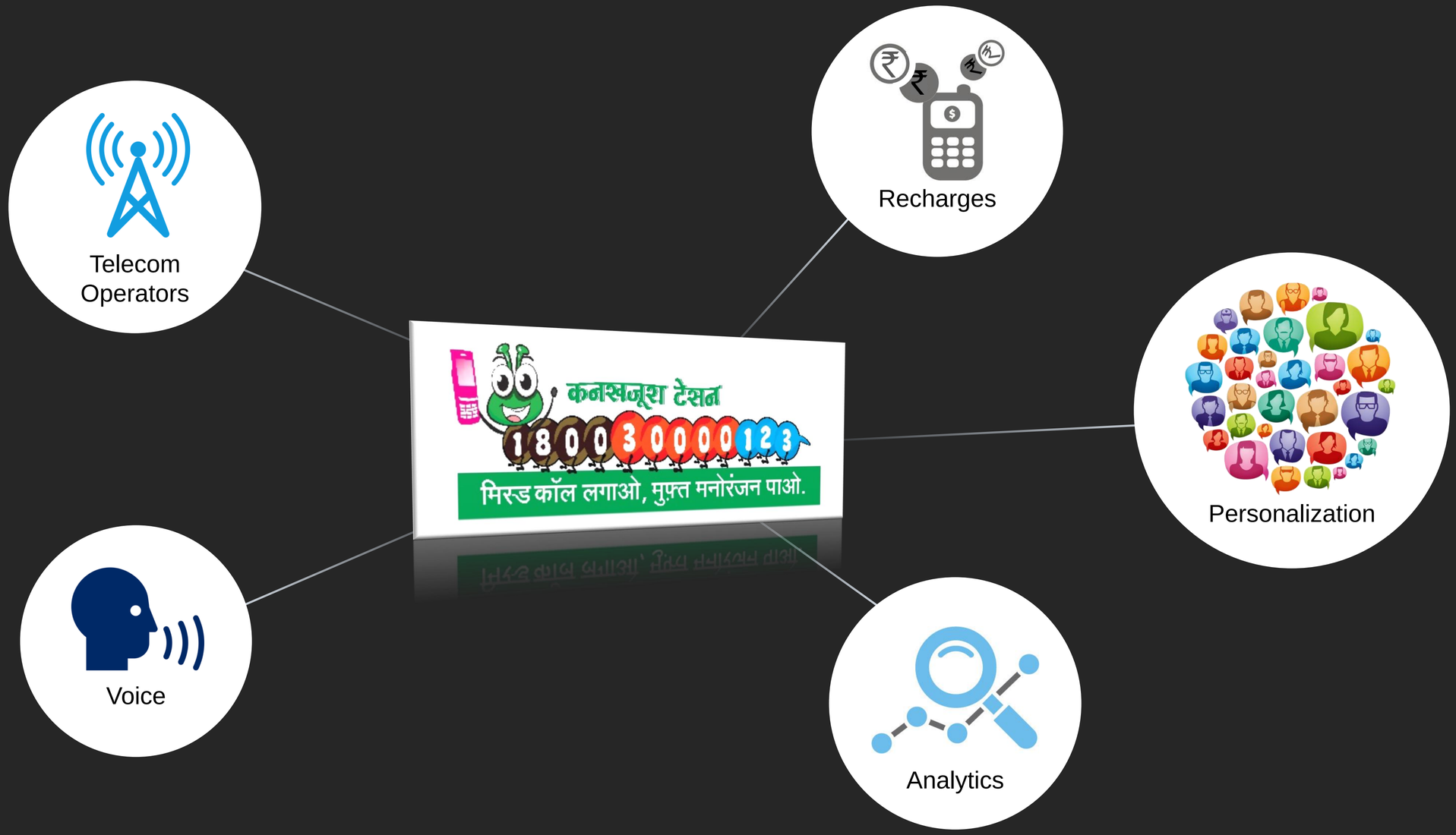
Now getting rolled out in Bangladesh as

(Kanamachi Station)



*Source: Internal Data

KKT leading to an ECO system



Active Wheel

लो कर लो बात



Communication Idea

Wheel rekindles the husband wife romance through its fragrance



The Campaign

A medium to the **wives to talk to their husbands for FREE**



Results

Total Reach
16M

Sale Increase vs All India
6X

Impact in TOM Awareness
+145%



Won
Cannes Lion
(Bronze) in Media category

*Source: Internal Data

Brand Insight

Unfair as it is, **appearance can open or shut doors to a brighter future**



The Campaign

Rin Career Ready Academy



Rin CAREER READY ACADEMY

OFFICE DRESSING

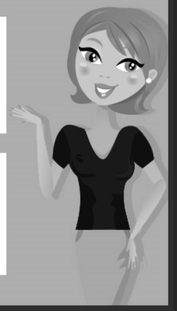
RINA'S TIPS ON COLOUR OF LIPSTICK

FOR PARTIES

Bright or dark lipstick

FOR OFFICE

Light coloured lipstick that matches skin tone and attire.

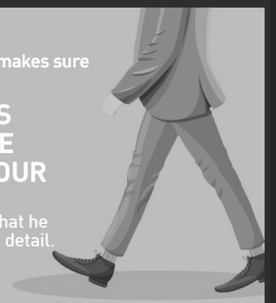


INTERVIEW TRAINING

RINVIJAY'S TIPS ON INTERVIEW PREPARATION

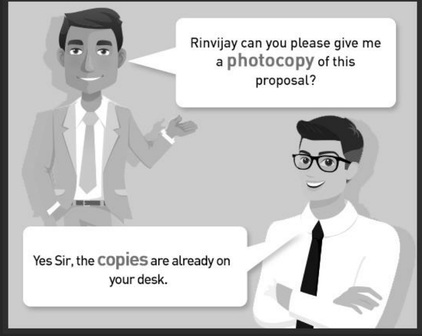
Rinvijay always makes sure **HIS PANTS AND SOCKS ARE OF THE SAME COLOUR**

It tells his boss that he pays attention to detail.



ENGLISH SPEAKING

RINVIJAY ON OFFICE LANGUAGE: PHOTOCOPY



INTERVIEW TRAINING

RINA'S TIPS ON INTERVIEW PREPARATION

Rina always reaches **WELL BEFORE TIME**

It shows that she is ready for the job.



INTERVIEW TRAINING

RINA'S TIPS ON INTERVIEW PREPARATION

Keep all documents ready a day before the interview.

- Resume
- Certificates
- Recommendation letters
- Passport size photos



INTERVIEW TRAINING

RINVIJAY'S TIPS ON HOW TO WRITE A RESUME

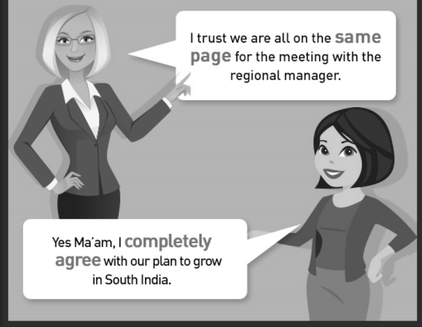
Rinvijay always ensures that his resume is not more than **ONE SIDE LONG.**

IT SHOWS THAT HE STICKS TO THE POINT AND VALUES THE INTERVIEWER'S TIME.



ENGLISH SPEAKING

RINA ON OFFICE LANGUAGE: SAME PAGE

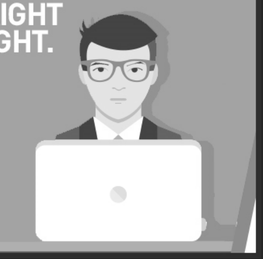


INTERVIEW TRAINING

RINVIJAY'S TIPS ON HOW TO CRACK AN INTERVIEW

Rinvijay always **SITS STRAIGHT AND UPRIGHT.**

It helps him create a great first impression.



OFFICE DRESSING

RINA'S TIPS ON ACCESSORIES

FOR PARTIES

Fashionable earrings, bangles, necklace, big rings, nose ring and even a watch

FOR OFFICE

Simple diamond earrings and a delicate watch



OFFICE DRESSING

RINA'S CLASSIC CORPORATE LOOK FOR A TERRIFIC TUESDAY

Dressing

- White collared shirt
- Well-fitted black trousers

Grooming

- Light lipstick
- Well combed hair

Accessories

- Elegant bracelet



INTERVIEW TRAINING

RINVIJAY'S TIPS ON INTERVIEW PREPARATION

Rinvijay's **HANDSHAKE IS FIRM.** It is neither too tight nor is it weak.

This a sign of **CONFIDENCE AND THE RIGHT ATTITUDE.**



OFFICE DRESSING

RINVIJAY'S TIPS ON SHOES

FOR CASUAL WEAR

Flip flops | Canvas shoes | Sandals

FOR OFFICE WEAR

Formal Polished Shoes

*Remember to match your belt with shoes and socks with trousers.



Results

Attribute Mind Measure
+1100 Bps

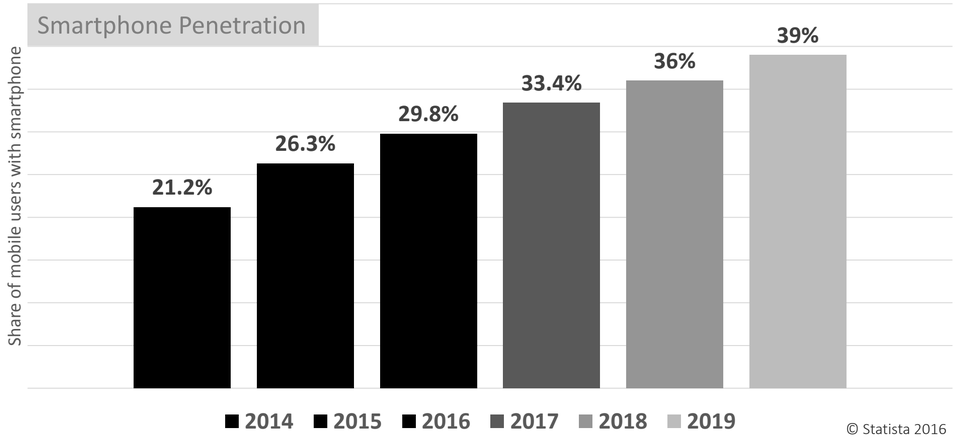
Penetration
+290 Bps

Engagement Duration
5M mins

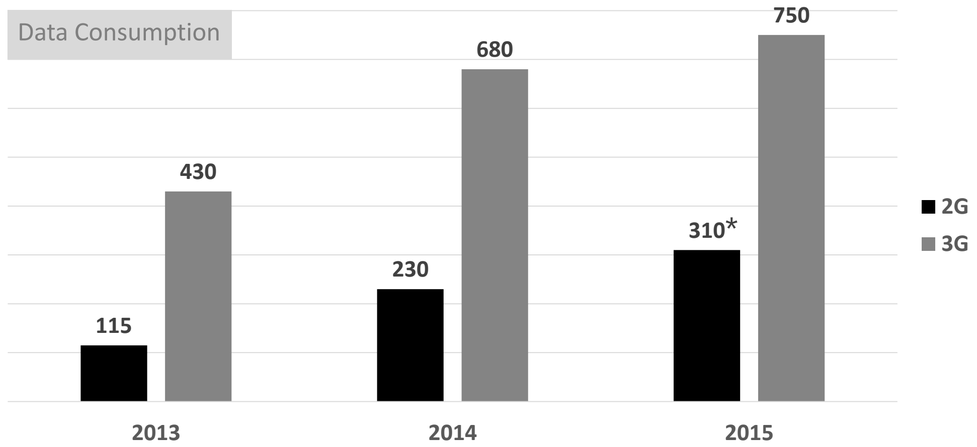
*Source: Internal Data

Video on Mobile

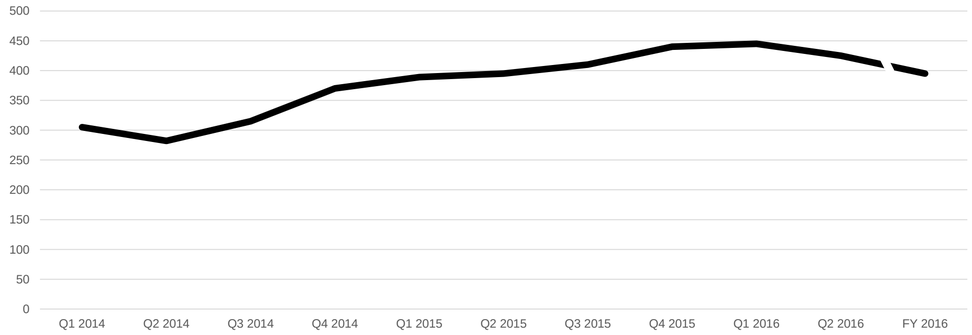
Smartphones have proliferated



Internet usage has grown



But data ARPU has not increased

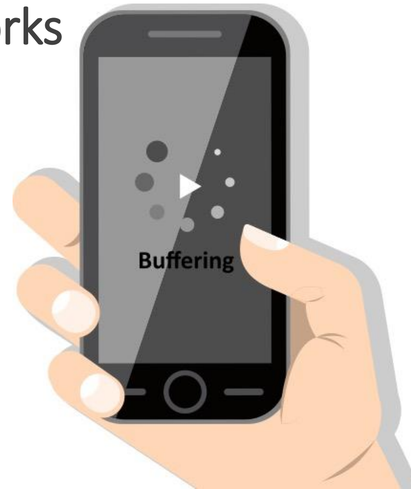


*Source: eMarketer, India Data

Due to high data costs & poor networks

"I know I can watch video on Mobiles but it consumes more of my data pack"

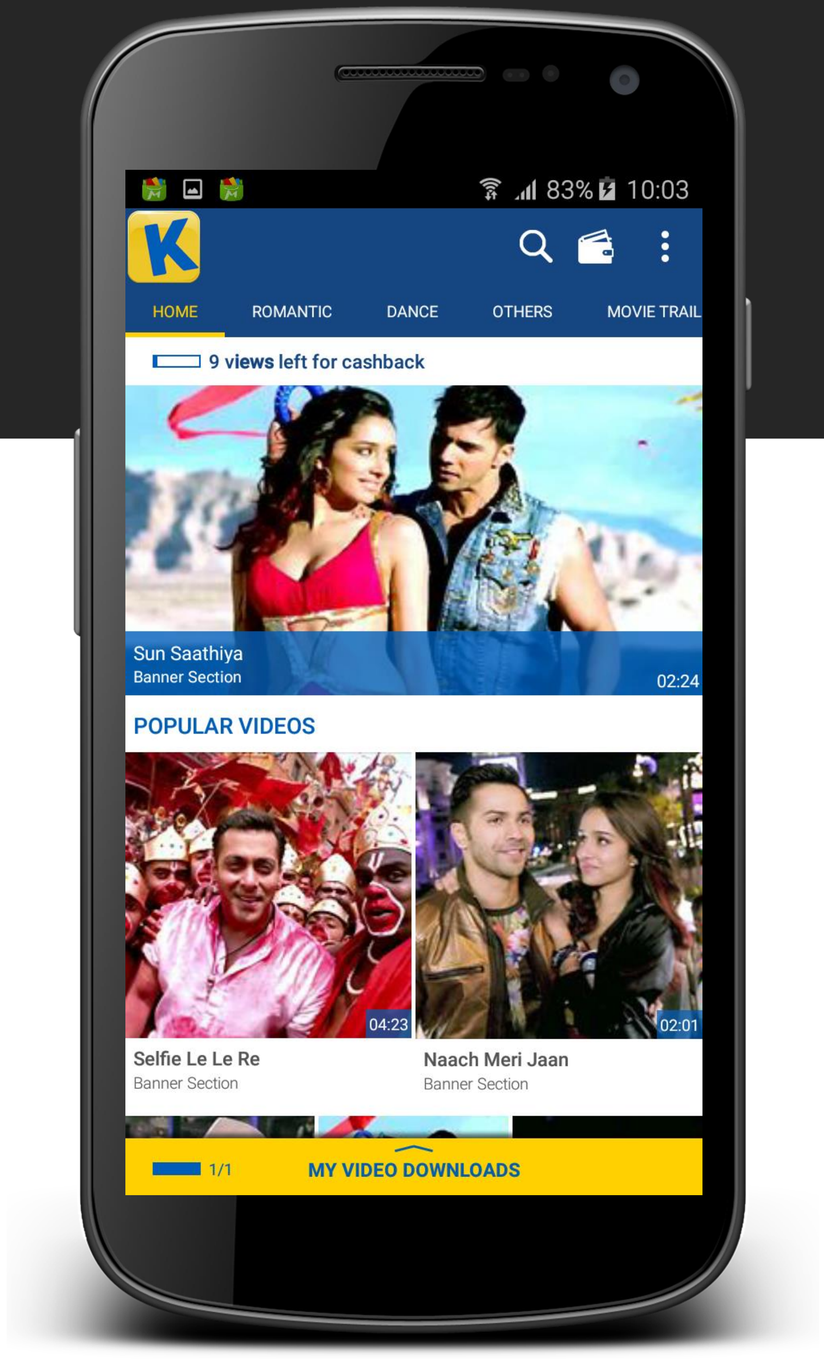
"Bad Data networks causes the video to load forever"



*Source: Statista; Nokia MBTI Study

KRISPY

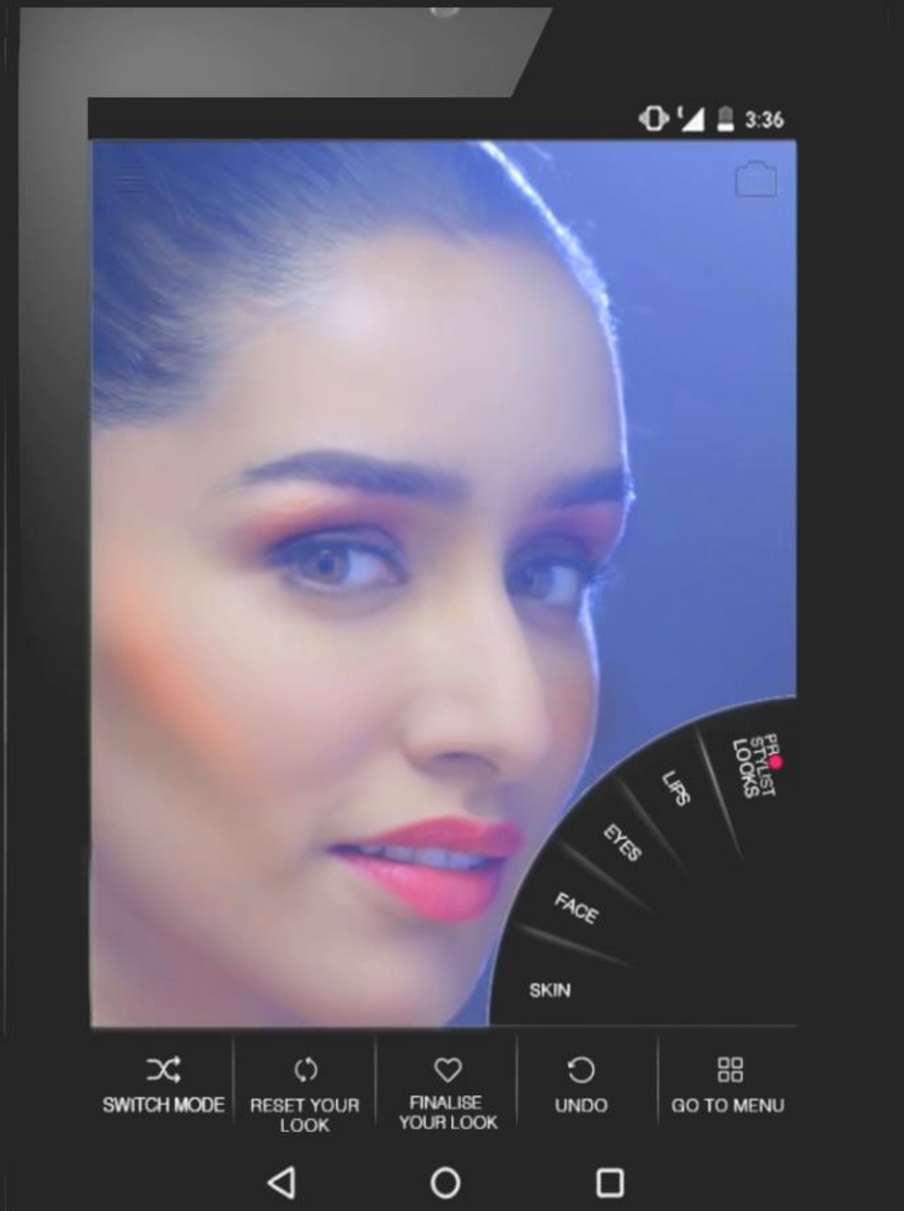
Entertainment ka pocket money



Build Rewarding Relationships



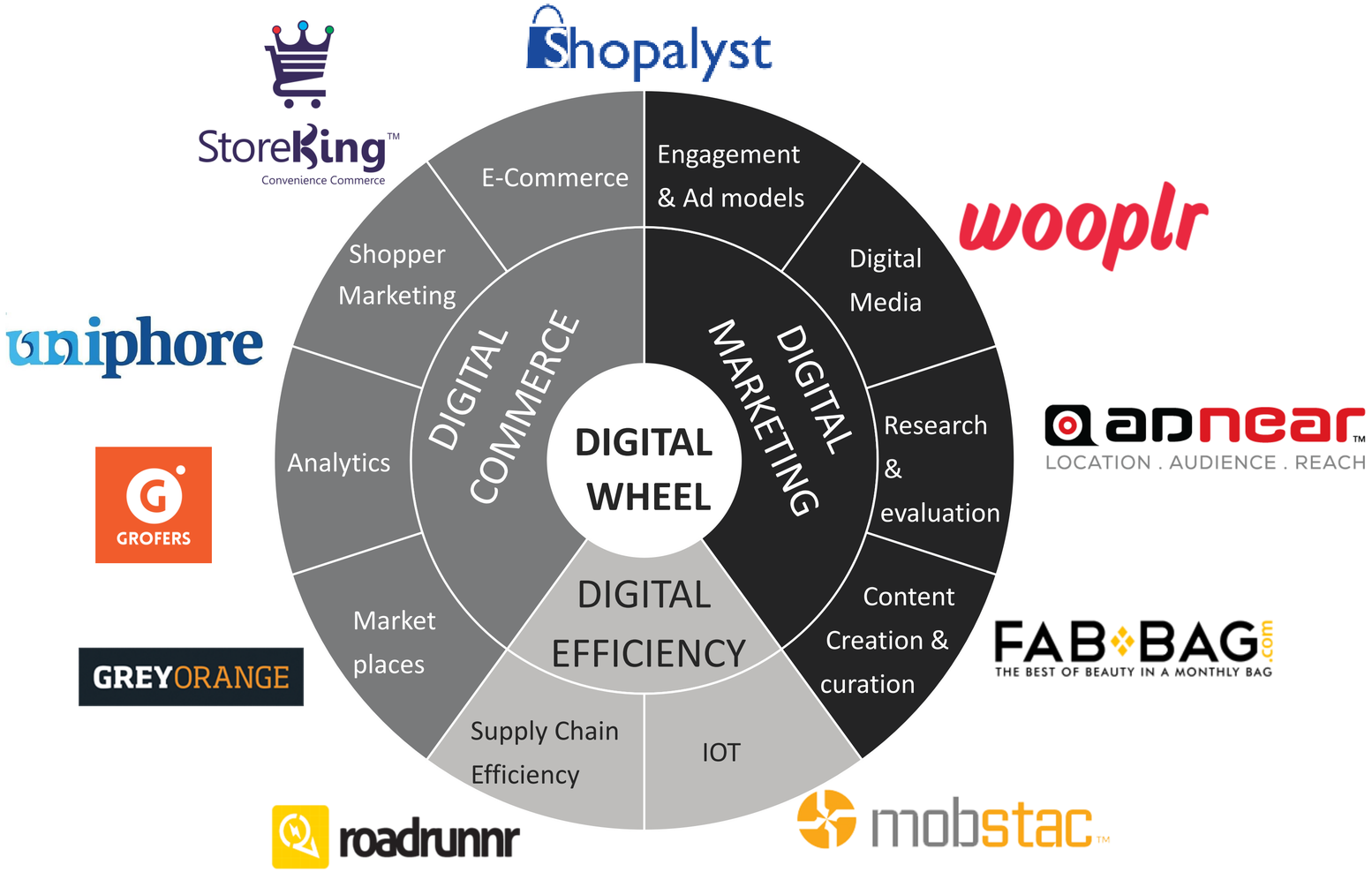
LAKMÉ
MAKEUP
PRO



How do we Stay Ahead of the Curve?



Unilever Foundry:
Building Partnerships For The Future







Pioneering & Experimenting



Holistic approach to digital



Deploying with scale

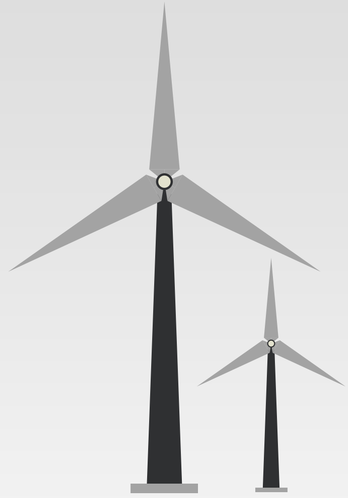
amazon.com

facebook

Google

NYKAA.COM

Eco-system of partners



Grow our brands & business sustainably

Marketing in a connected world

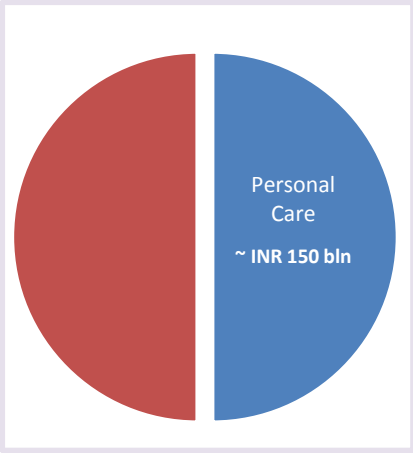
Thank you

Personal Care INDIA



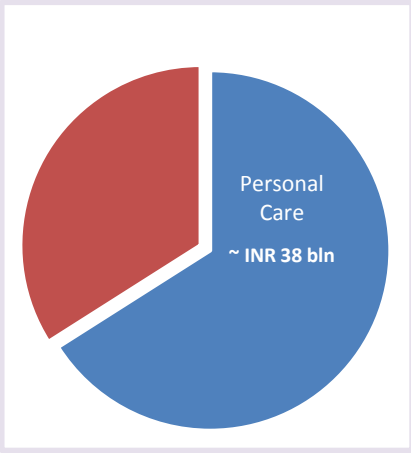
Introducing Personal Care - India

1/2 of HUL's revenue



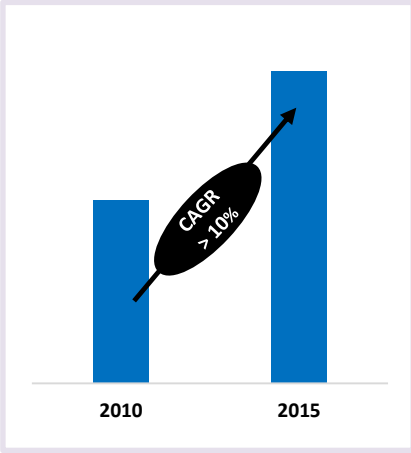
2nd largest PC business in Unilever

2/3 of HUL's profit



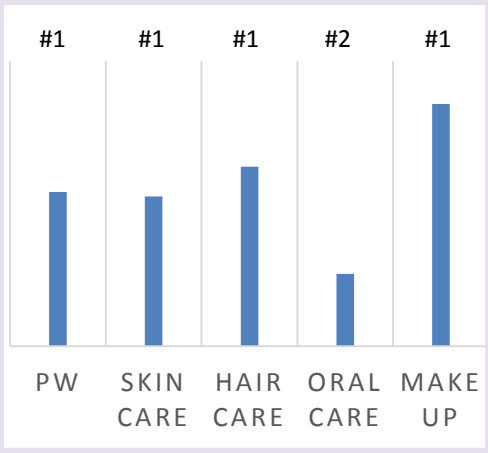
Operating margins ~ 25%

Fast growing



Added > INR 6000 Crore in 5 years

Leading brand positions



Market leader across categories

With Six iconic 1000 crore brands













Our Vision



Continue to grow ahead of the market across PC categories

Become the Wikipedia of Personal Care in India

Key thrusts for Personal Care

Make Core Aspirational













Lead Market Premiumisation













Make Core Aspirational

More and bigger innovations on core brands

Build consistent engagement platforms rooted in brand mission & functional promise

Core of the Core



More and bigger innovations on core brands

BB cream



Biggest BB cream in the market within a year of launch

Ayurvedic Care



Participating in the growing naturals market

Powder Cream



New sensorial that delivers long lasting fairness

Engagement platforms rooted in Brand Mission & Functional Promise

JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC
Winter		Hand Foot Mouth	Summer		Summer/Back to School		Monsoon		Pink Eye	Winter	



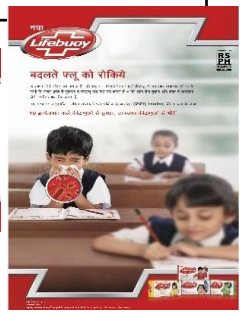






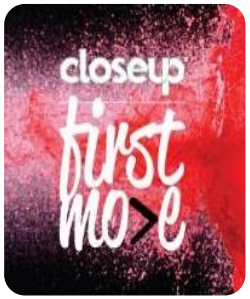






Close Up Engagement Platform- First Move

2015 : Launch of First Move





Penetration All India	21.7 ↑
Penetration LSM 7+	18.7 ↑

High Brand Engagement



Brand Awareness	Up 30% ↑
Social Engagement	Up 15x ↑
Brand Conviction	Up 600 BPS ↑

First Move integrated Promotion plan

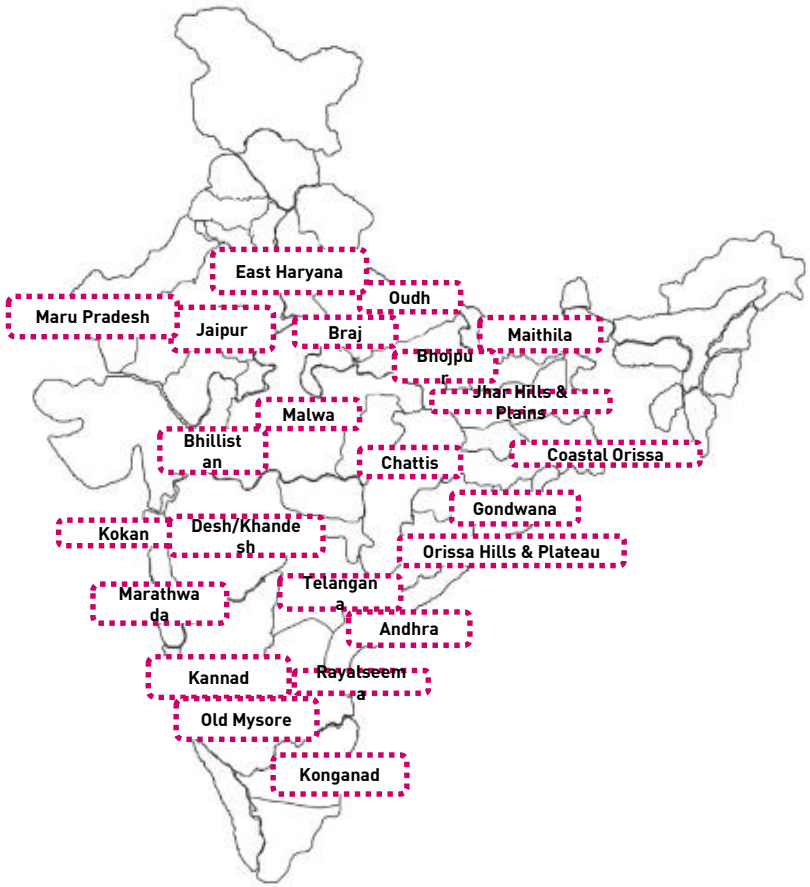






Leveraging WIMI – to drive Core of the Core across Rural Markets

Selection of key SCRs that contribute to over half of the sachet business



Locally relevant insights activated



Hindi heartland



WB & Maharashtra

Localised promotions (Central India+Mah)



Lead Market Premiumisation

Pioneering New trends

Turbo charge Market development by building new benefits



Lakmé: Pioneering new trends

2014: Gloss



2015: Sculpt



2016: Illuminate



Premium Skin Lightening: Pioneering BB/CC Cream as a trend

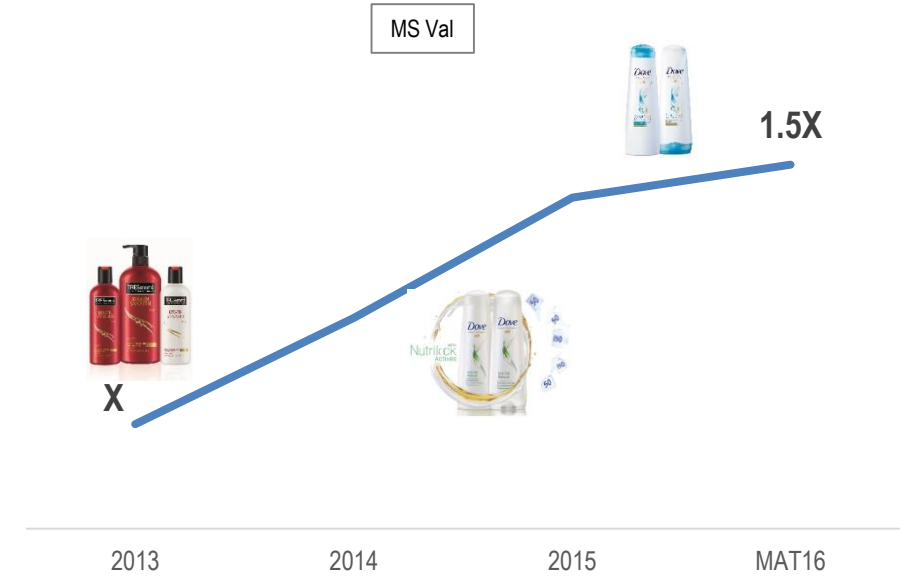




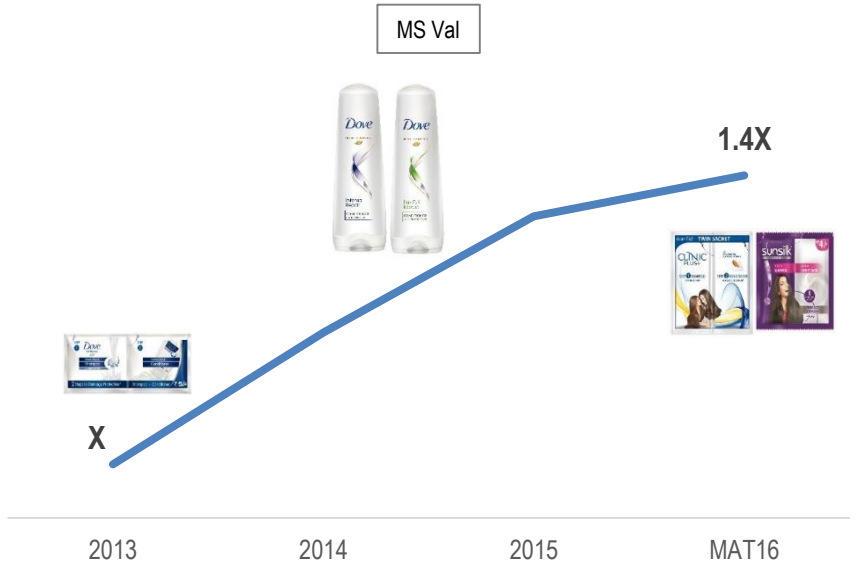


Dove & TRESemme: Premiumisation led by new benefits

Premium Shampoos (Dove & TRESemmé) winning with new benefits



Conditioners – Winning in the segments of future



Dove Oxygen Moisture



TRESemmé Spa Rejuvenation



Clinic Plus Twin Sachet



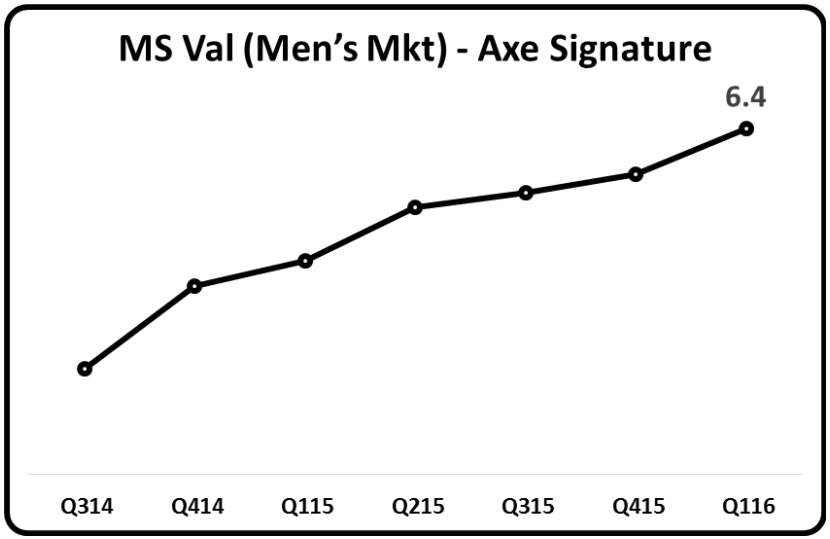
SunsilkTwin Sachet



** Source – Nielsen retail panel MS Val, IMRB consumer Panel HH penetration*

Axe Signature: Premiumisation led by new benefits





Biggest innovation in Personal Care in 2015

Lead Premiumisation in the emerging Naturals Segment

Within the existing portfolio





Extending our presence to new brands







PC Enablers

Dialling up the BIG Q agenda



PC Enablers: Building the PC Gene

Craftsmanship	WIMI & MDM	Digital	Assortment & Drug	Financial Growth Model
1 Let people fly	2 Build capabilities	3 Win on Trends	4 Win in channels	5 Fuel for growth
 The Pursuit of Perfection	 Turbocharge Market Development	 Digital	 E Commerce	 Strong savings program
 Everyday Inspiration	 Leverage WIMI	 Engagement Platforms	 Transform MT	 Gross Margin

1



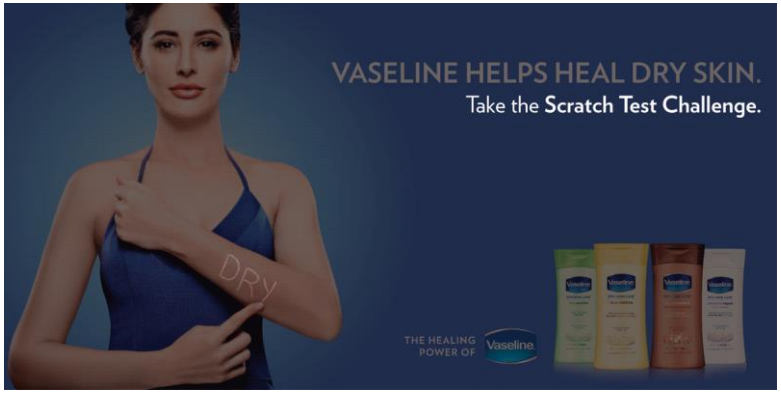
Craftsmanship

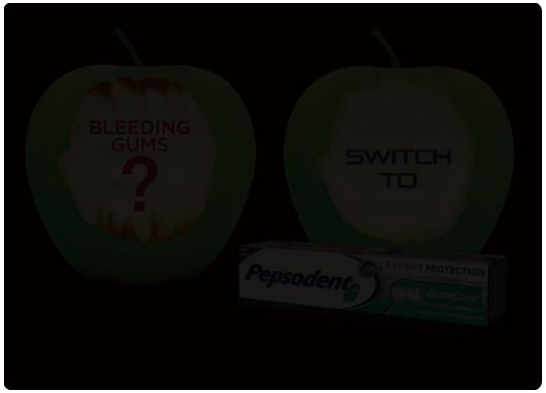
Leading Edge Technology to drive brand propositions at POS

DYNAMIC ASSETS









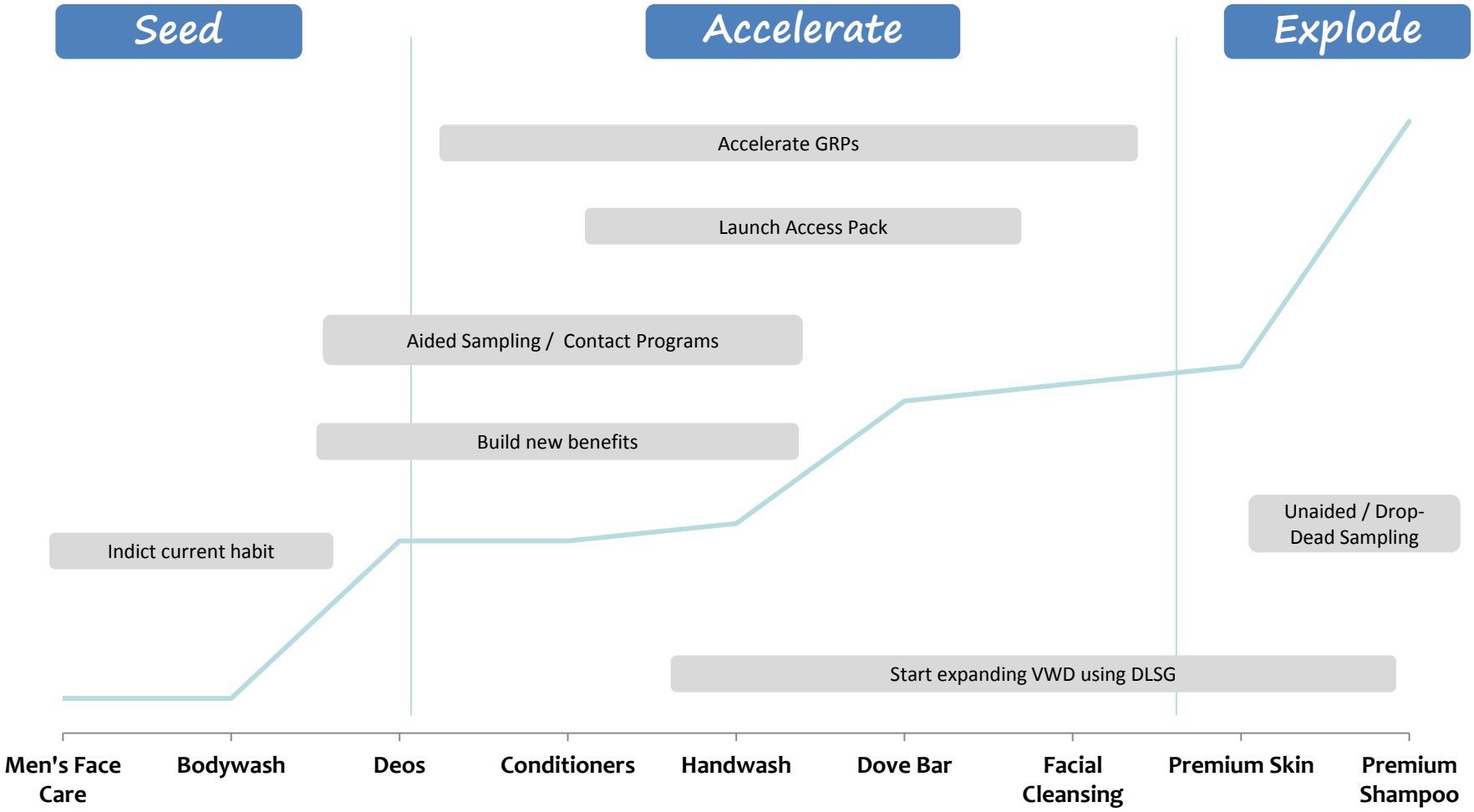
E-ink Parasite Hangers
Deployed across 25% of stores in Modern Trade

2



Turbocharge Market Development

One size does not fit all:
Clear approach based on degree of evolution of category



Sampling supported with education

POND'S BB



DOVE CONDITIONER





FAL FACE WASH



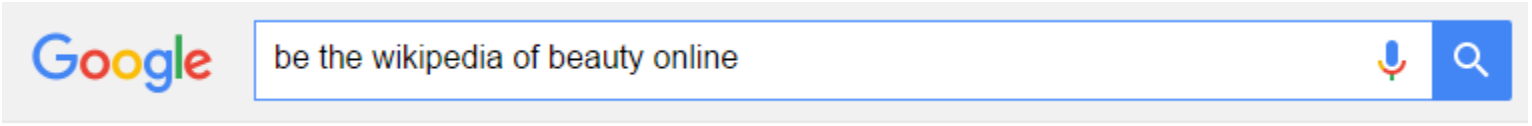
3



Digital

- Wikipedia of hair, Skin & Make-up

Wikipedia: All things hair, skin & make up



Search: The Bedrock

12M searches a month

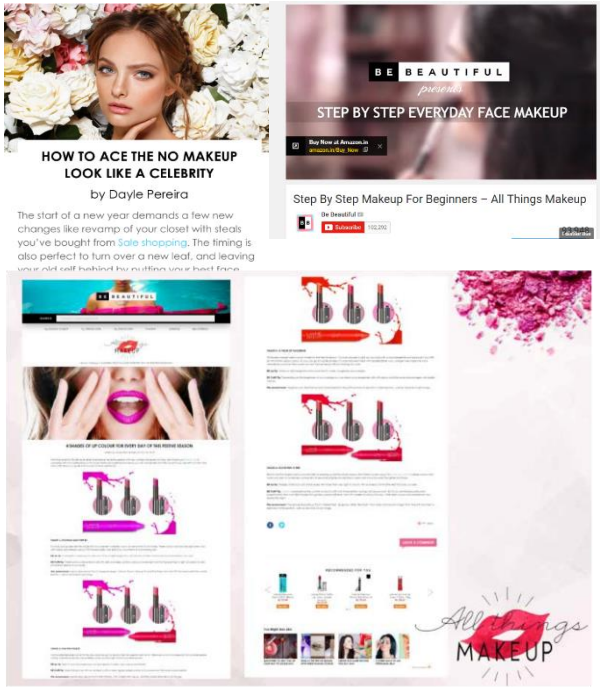
5M unbranded searches
4.5M branded searches

2.5M
irrelevant searches

MICRO MOMENTS ON SEARCH

KNOW	DO	GO	BUY
How to's Latest trends	How to use What to	To a salon Services	Products Complete look

Relevant content



100+ videos

Encouraging Results

All things MAKEUP
All things SKIN
All things HAIR

Be Beautiful: No.3 beauty portal in India

CTR: 2X of BM

CPC half of benchmark

Our Vision



Continue to grow ahead of the market across PC categories

Become the Wikipedia of Personal Care in India

REFRESHMENT

REFRESHMENT

ANNUAL INVESTOR MEET | 19 JULY 2016



WHAT I AM GOING TO SPEAK ABOUT

1. The refreshment opportunity in India

2. Why do we think HUL will win

3. Our strategy to win

OUR PORTFOLIO







	TEA	COFFEE	ICE CREAM
GLOBAL POSITION	#1	NA	#1
INDIA POSITION	#1	#1	#2

THE OPPORTUNITIES - TEA



LOOSE TEA UPGRADATION

We are just **10%** of the mkt. vol



INDIA TEA BAGS

Potential to be **E100** Mn today



GREEN TEA

At **2X** margin, Explosive Growth

THE OPPORTUNITIES - COFFEE



Conventional Coffee Upgradation

3/4th of the Mkt still to be tapped



Tea User Conversion

Coffee, only 5% of tea consumption

THE OPPORTUNITIES – ICE CREAM



Share Gain

Only 1/10th share of a **E1.2Bn** Mkt



Consumption Increase

400ml ppc vs. **1.6l** (Indo) & **7l** (Brazil)

ARE WE SURE OF THE OPPORTUNITY

	Refreshment as a % of HUL
India	15%
South India	24%
Pakistan	34%

WHAT I AM GOING TO SPEAK ABOUT

1. The refreshment opportunity in India

2. Why do we think HUL will win

3. Our strategy to win

POWERFUL BRANDS







	TEA	COFFEE	ICE CREAM
SHARE OF MIND TO SHARE OF MARKET	3X	1.2X	5X

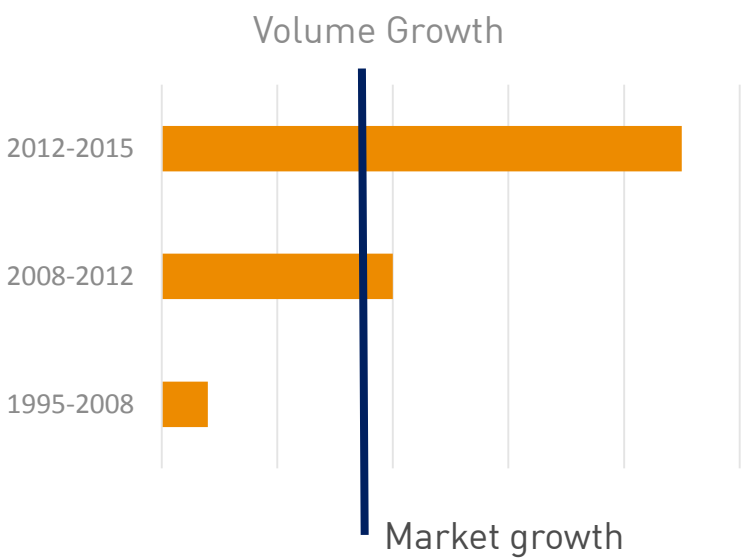
VERY STRONG BUSINESS MODEL

	Tea	Ice Cream	Coffee
GM% indexed to Source of Growth	2X	1.5X	2X
Indexed GM growth 2013-2016	1.2X	1.4X	1.2X
Share of media spends to market share	5X	5X	1.4X

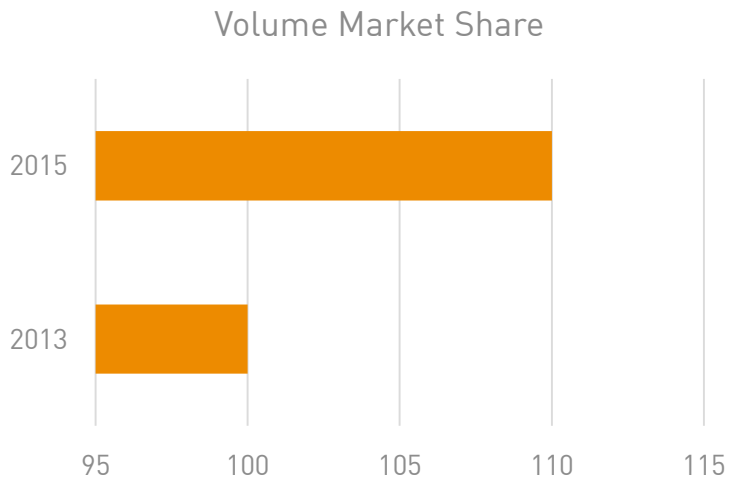
We have the FUEL to WIN the Market

COMPETITIVE GROWTH

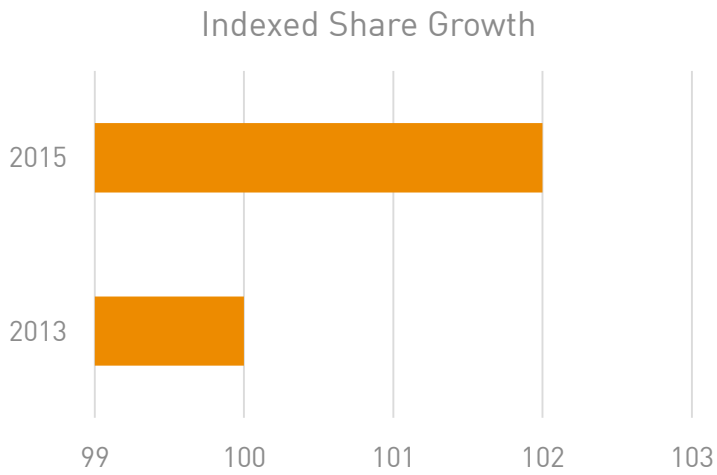
TEA



COFFEE

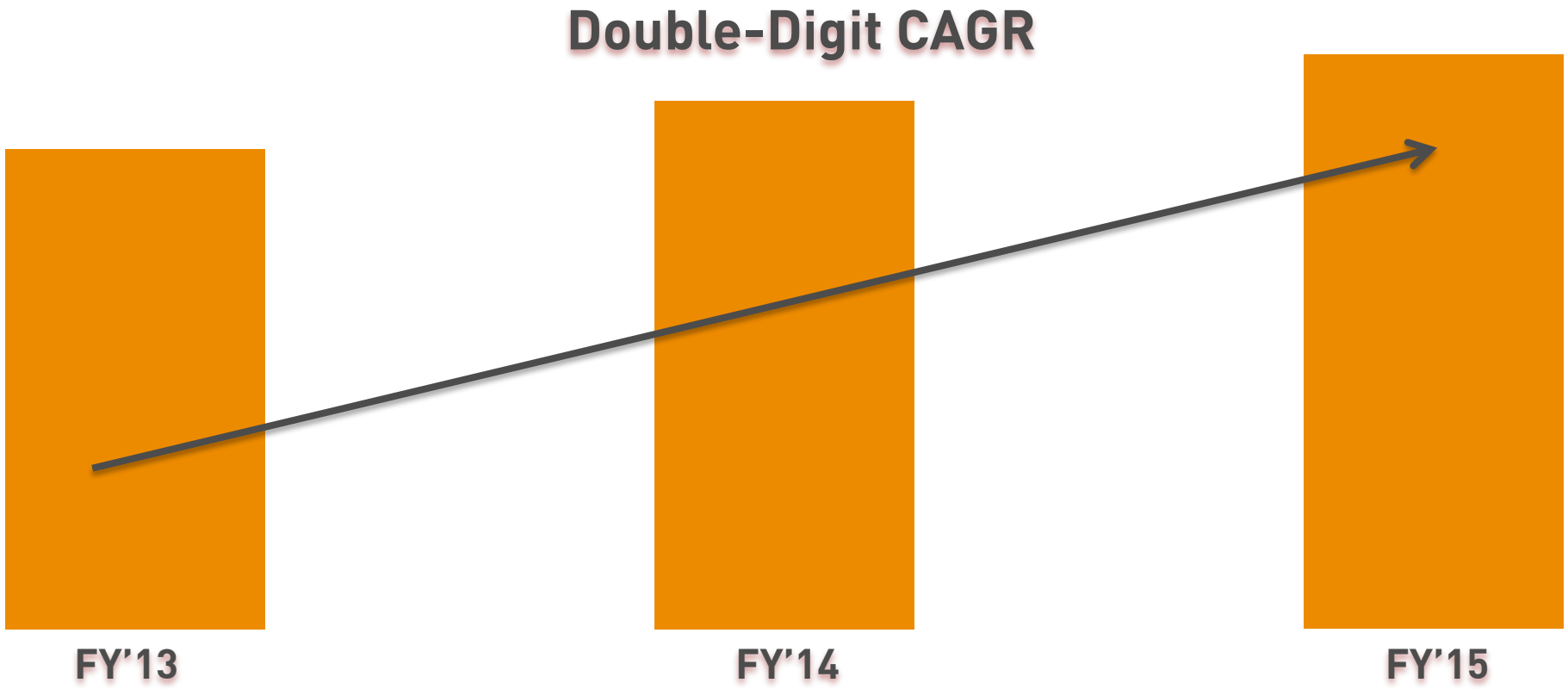


ICE CREAM



Consistent Growth Across Categories

NOW IS THE TIME TO ACCELERATE



WHAT I AM GOING TO SPEAK ABOUT

1. The refreshment opportunity in India

2. Why do we think HUL will win

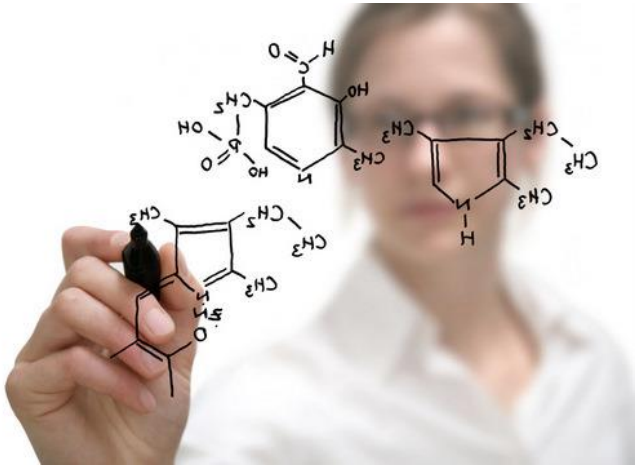
3. Our strategy to win

FOUR FOLD STRATEGY

CRAFT MAGICAL BRANDS



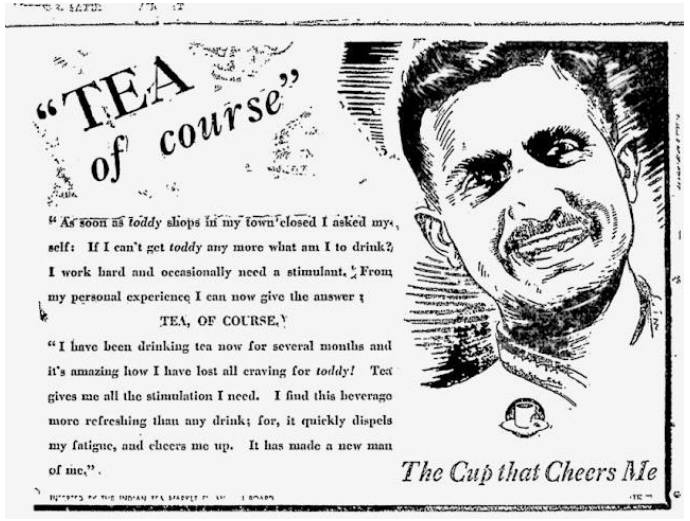
DIFFERENTIATED TECHNOLOGY



WIN IN MANY INDIA'S



MARKET DEVELOPMENT



CRAFT MAGICAL BRANDS







DIFFERENTIATE WITH TECHNOLOGY

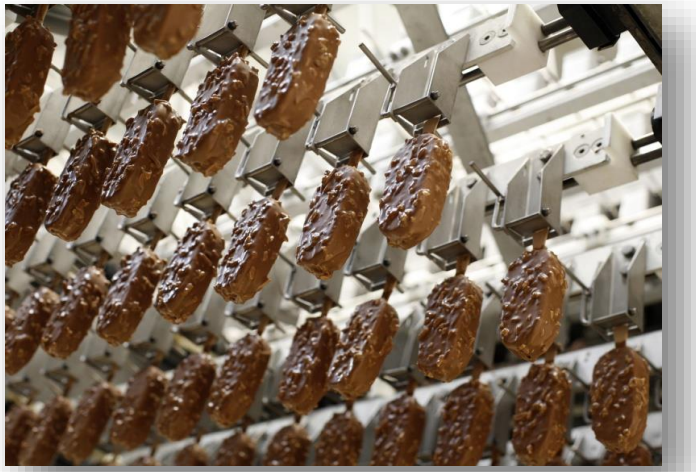
FRESH TEA VENDING MACHINES



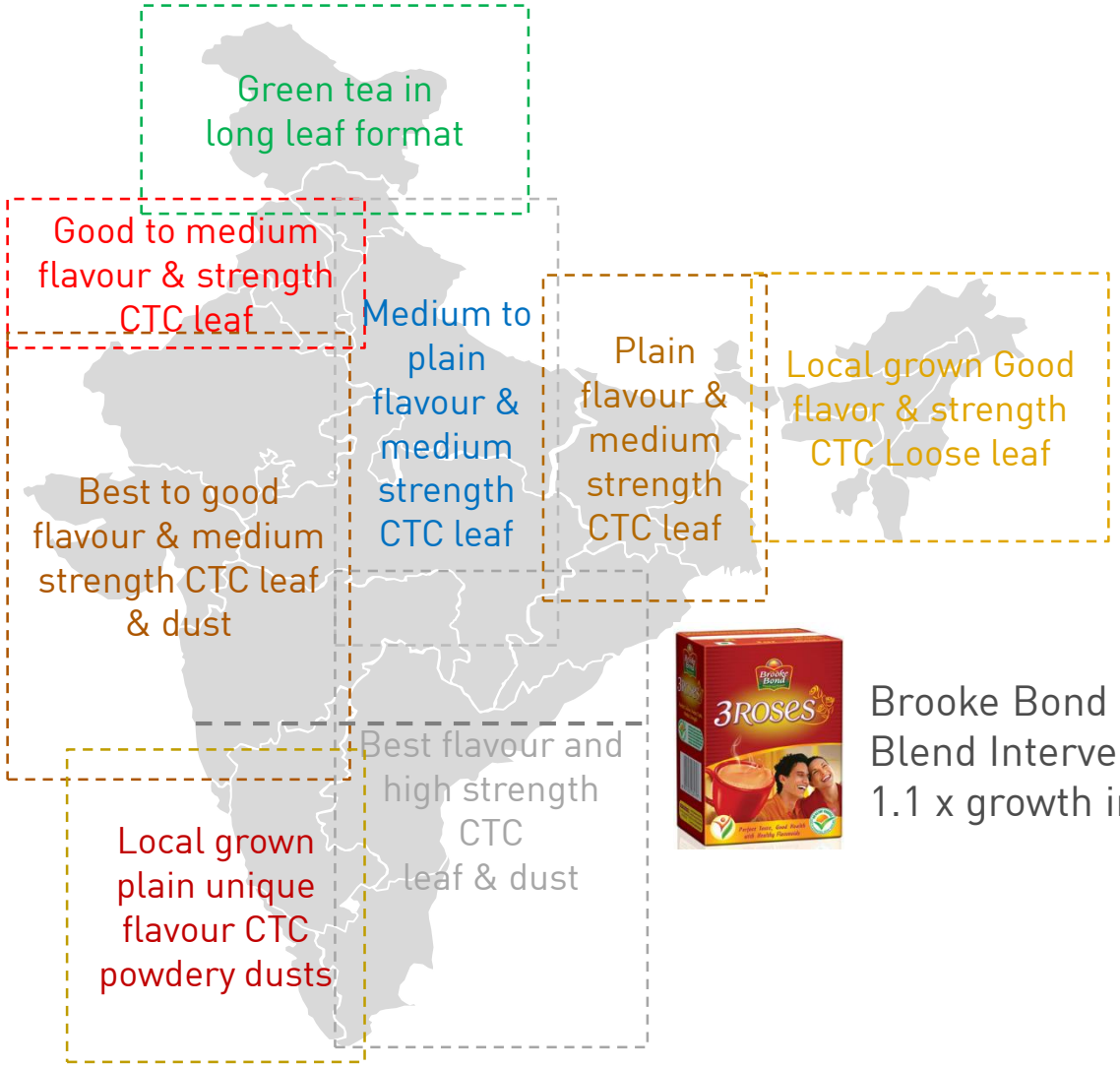
PROPRIETARY COFFEE TECHNOLOGY



PROPRIETARY ICE CREAM TECHNOLOGY



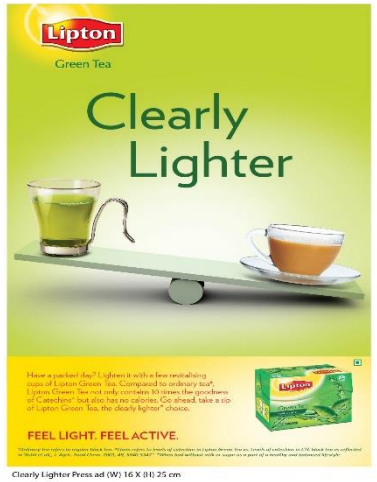
WINNING IN MANY INDIA'S



Brooke Bond 3 Roses Blend Intervention leading to 1.1 x growth in market share

MARKET DEVELOPMENT

Green Tea



Clearly Lighter Press ad (W) 16 X (H) 25 cm

Boilable Tea Buds



Flavoured tea



BRU: CC conversion



REFRESHMENT

Unilever

THANK YOU





