

# CATEGORY UPDATES

ANNUAL INVESTOR MEET | 6 JUNE 2018



*Hindustan Unilever Limited*

# SAFE HARBOUR STATEMENT



Hindustan Unilever Limited

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.



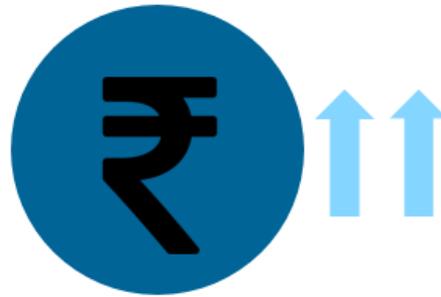
# FOODS & REFRESHMENT

SUDHIR SITAPATI

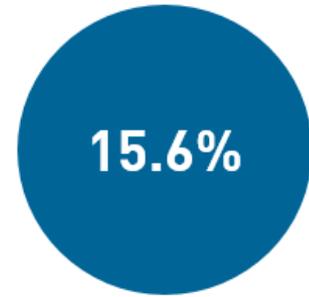
# FY 2017-18 PERFORMANCE HIGHLIGHTS



**Leading position in  
6 F&R categories**



**Double Digit  
TO growth**



**Segmental Operating  
margin FY'18**

# TEA: MARKET LEADERSHIP GAINED



Turnover



1.8 X

Profitability



2.0 X

No. 1 Tea Company in India

# OUR STRATEGY

Drive premiumization  
& upgradation



Invest in Market  
Development



Win in channels  
of the future



Winning in Many  
Indias (WiMI)



# OUR STRATEGY

Drive premiumization  
& upgradation



Invest in Market  
Development



Win in channels  
of the future



Winning in Many  
Indias (WiMI)



# FOODS: DRIVING PREMIUMIZATION THROUGH VARIANTS



Hindustan Unilever Limited



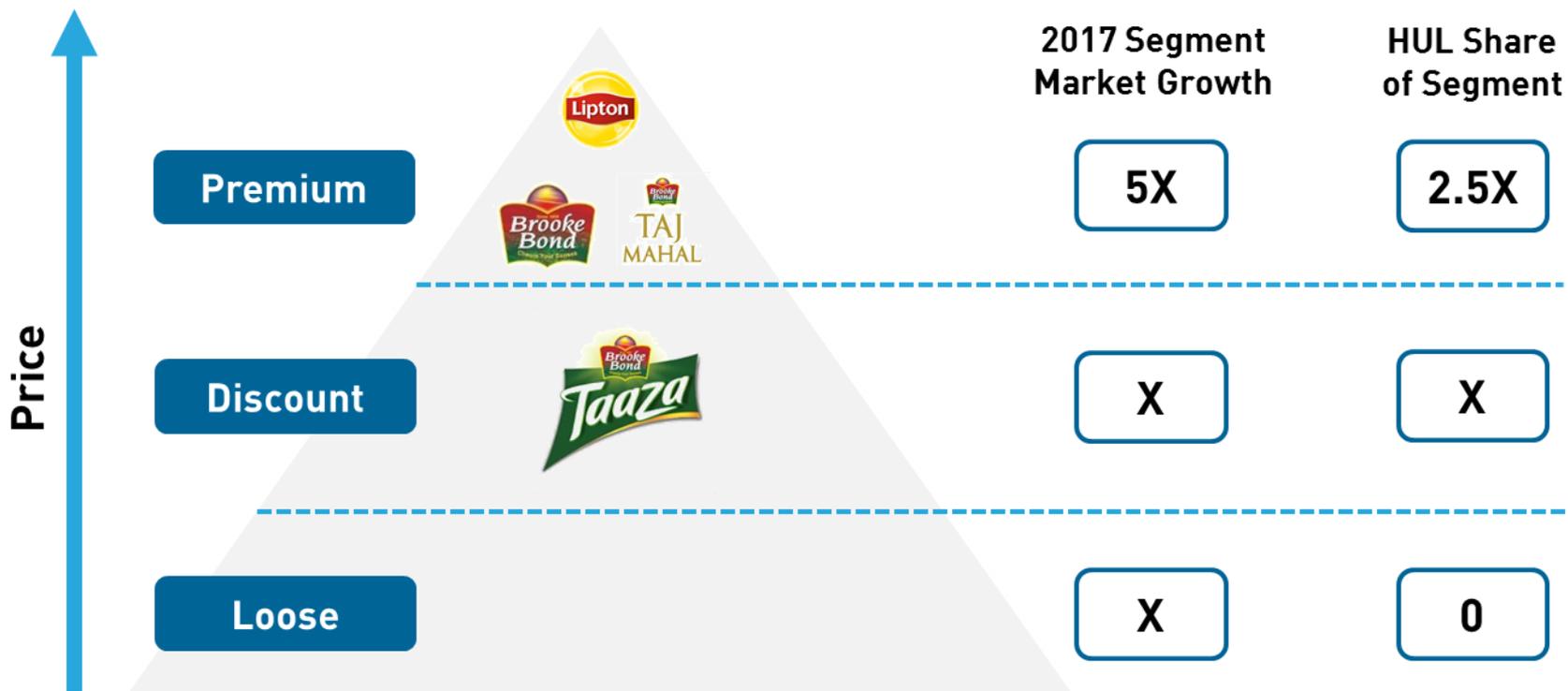
Accretive to foods portfolio  
by **580 bps**

**...AND PLOUGHING BACK INTO CORE**



**24%** volume growth  
on core pack

# TEA



# OUR STRATEGY

Drive premiumization  
& upgradation



Invest in Market  
Development



Win in channels  
of the future



Winning in Many  
Indias (WiMI)



# FOODS: TAPPING THE SNACKING OPPORTUNITY



## Attractive Market



MEDIA



VISIBILITY AT POS



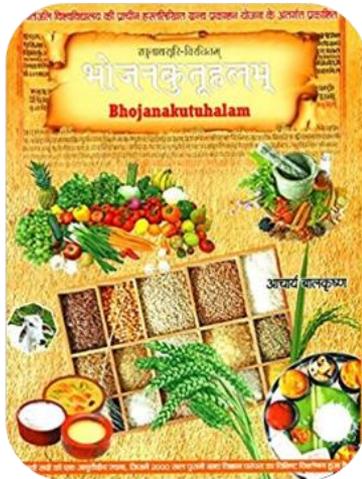
SAMPLING



Knorr Noodles AV

# FOODS: CATERING TO THE NATURALS SEGMENT

## Inspired by Ancient Wisdom



Inspired by recipes and ingredients from ancient texts

## Making Traditional Ingredients Contemporary



Millets, cow's ghee, spices in a wholesome breakfast mix, with no added preservatives

## Building capabilities for pilot launches



Road test the mix in Chennai before scale up to rest of India

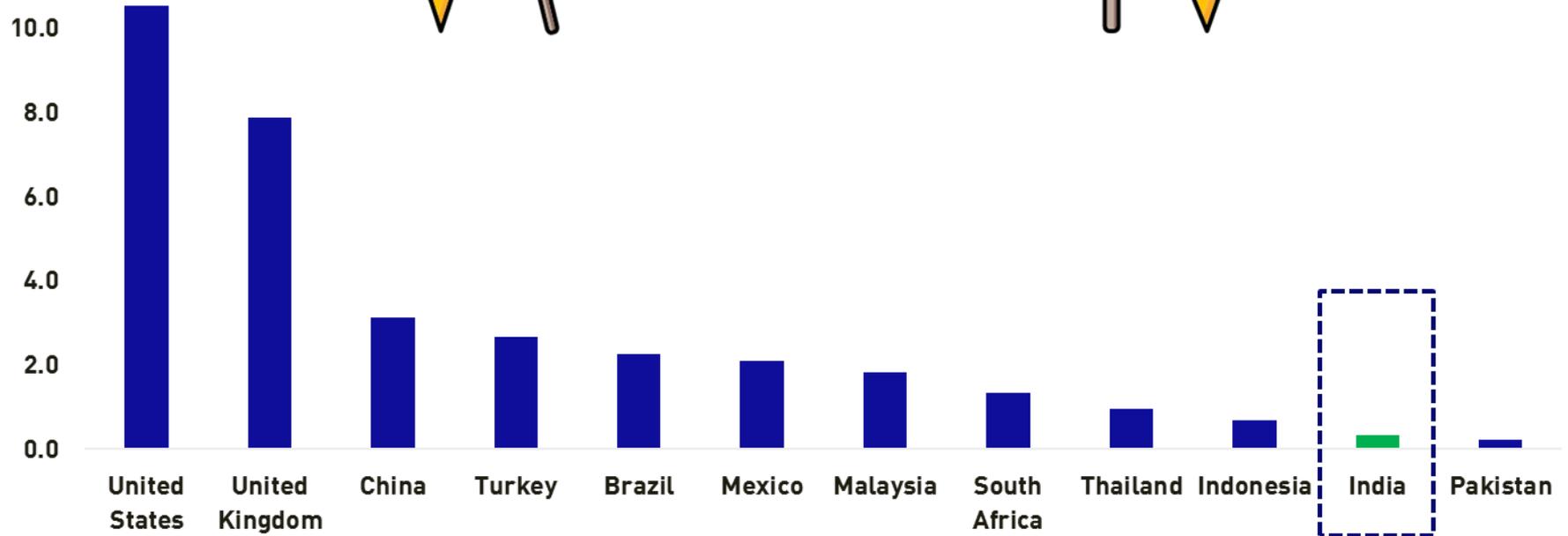


Lever ayush Foods AV

# ICE CREAM CONSUMPTION: INDIA VS. THE WORLD



Country wise PCC (KGs) Ice cream



# DEVELOPING NEW SEGMENTS IN ICE CREAMS



Cornetto Oreo & Kwality Wall's Sandwich AV

# OUR STRATEGY

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Development



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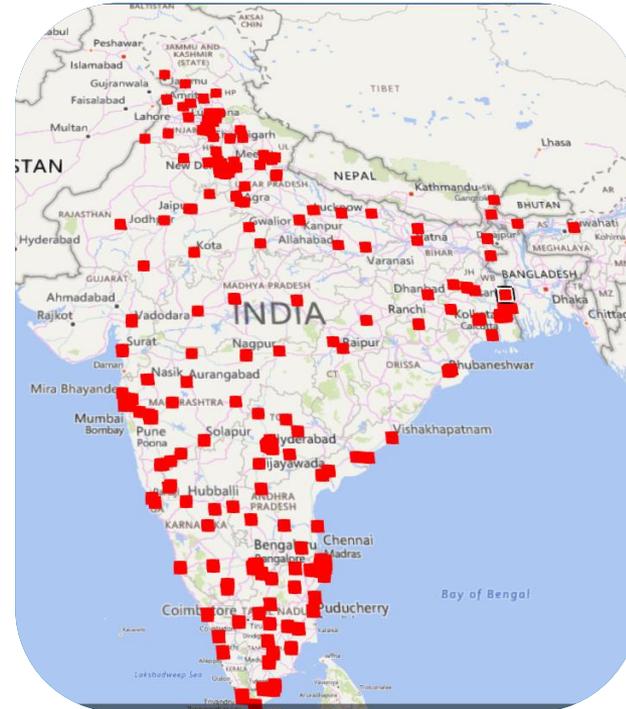


# KWALITY WALL'S PRESENCE: FROM 40 CITIES TO 400 PLUS CITIES

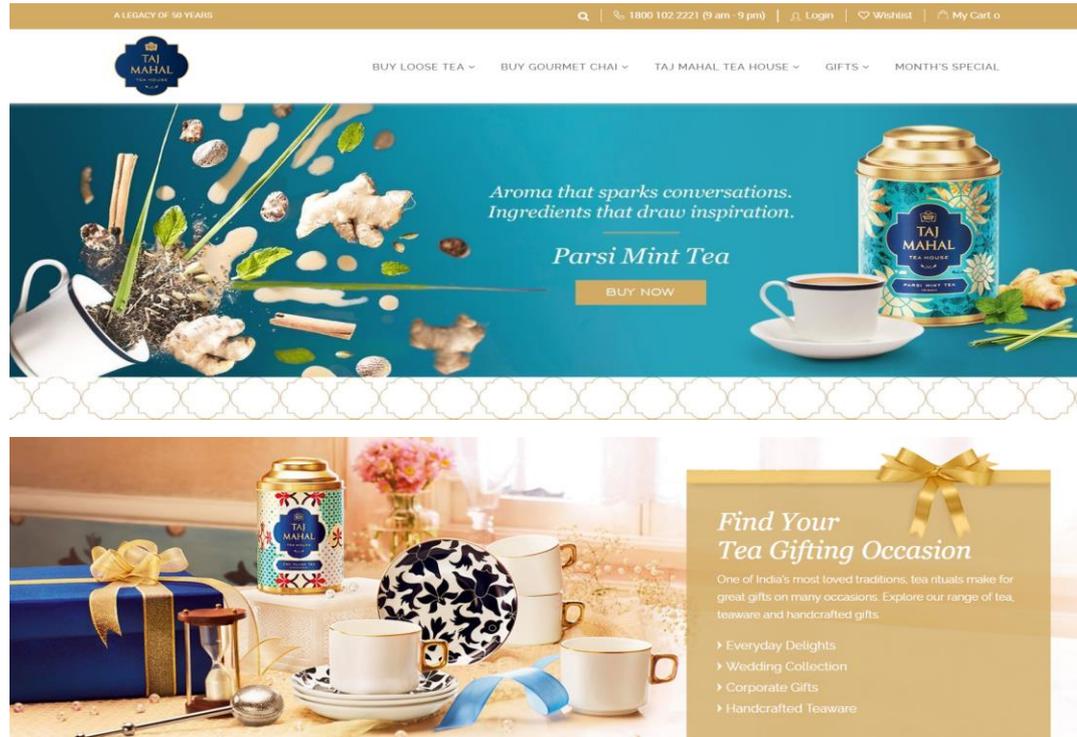
YEAR 2014



YEAR 2018



# TAJ MAHAL ECOMMERCE SITE



A LEGACY OF 50 YEARS | 1800 102 2221 (9 am - 9 pm) | Login | Wishlist | My Cart

TAJ MAHAL  
BUY LOOSE TEA ~ BUY GOURMET CHAI ~ TAJ MAHAL TEA HOUSE ~ GIFTS ~ MONTH'S SPECIAL

*Aroma that sparks conversations.  
Ingredients that draw inspiration.*

**Parsi Mint Tea**

BUY NOW

*Find Your  
Tea Gifting Occasion*

One of India's most loved traditions, tea rituals make for great gifts on many occasions. Explore our range of tea, teaware and handcrafted gifts.

- › Everyday Delights
- › Wedding Collection
- › Corporate Gifts
- › Handcrafted Teaware



Taj Mahal Tea AV

# FOODS: TAPPING THE DIGITAL LANDSCAPE WITH SEEK-OUT CONTENT



tato Cheese Balls - Cheese Balls in Tamarind Sauce Recipe - Quick & Easy Snack Recipe For Kids



IFN

=



+



Kissan AV

# OUR STRATEGY

Drive premiumization  
& upgradation



Invest in Market  
Development



Win in channels  
of the future



Winning in Many  
Indias (WiMI)



# WiMI DEPLOYED IN TEA & COFFEE

BRU Instant

25%\*  
എക്സ്ട്രാ  
₹10 പായ്യിൽ.

10% EXTRA  
BRU Instant  
₹2

₹10 10g

LIKE COMING TOGETHER  
OVER A STEAMING CUP  
OF RED LABEL TEA.

Swad apnepan ka

Red Label



WiMI: Bru & Red Label AV



**THANK YOU!**



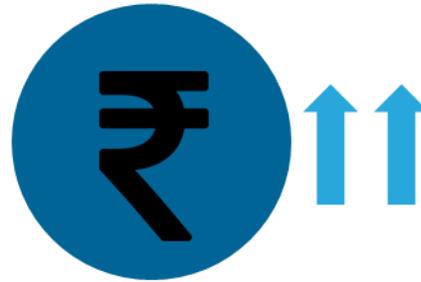
# HOME CARE

PRIYA NAIR

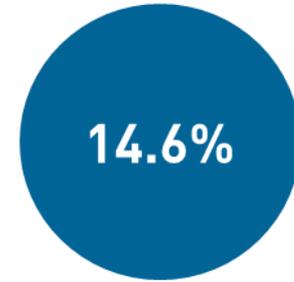
# FY 2017-18 PERFORMANCE HIGHLIGHTS



**In all Key Sub  
Categories**



**Double Digit  
TO growth\***



**Segmental Operating  
Margin FY'18**

# OUR STRATEGY

**Drive premiumization  
& upgradation**



**Invest in Market  
Development**



**Win in channels  
of the future**



**Grow Profitably**



# OUR STRATEGY

**Drive premiumization  
& upgradation**



**Invest in Market  
Development**



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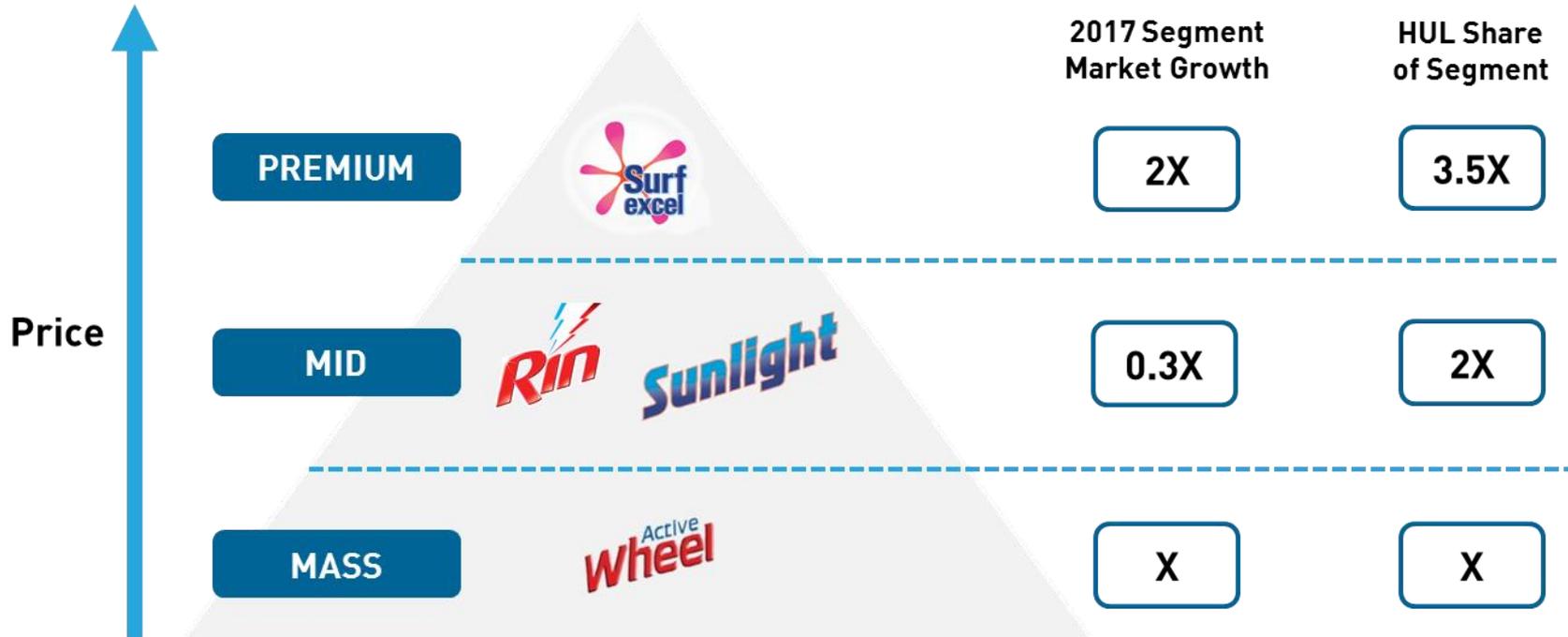


**Grow Profitably**



# PREMIUMIZATION IN LAUNDRY

## ENABLING COMPETITIVE AND PROFITABLE GROWTH



# BUILDING ASPIRATIONAL BRANDS AIDS PREMIUMIZATION



## #HAARKOHARAO



Bachche haarna kahan se seekhte hain?

**THINK**



**TALK**



**ACT**



Surf Excel AV

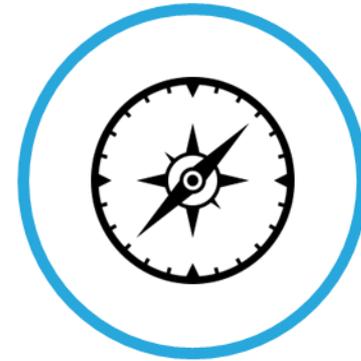
# BUT IMPORTANT TO REMAIN COMPETITIVE IN MASS EVEN AS WE UPGRADE THE MARKET



**Value, not price**



**Sharp choices**



**Building a  
purposeful brand**

# BUILDING A PURPOSEFUL WHEEL



Active Wheel AV

# OUR STRATEGY

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Grow Profitably



# CREATING SEGMENTS OF THE FUTURE

## LAUNDRY



**MATIC  
POWDERS**



**SURF EXCEL MATIC  
LIQUID DETERGENT**



**RIN MATIC  
LIQUID DETERGENT**



**FABRIC  
CONDITIONER**

**GROWTH AT 3X OF REST OF LAUNDRY**

# WHILE EDUCATING CONSUMERS TO BUILD NEW HABITS

## LAUNDRY



**SURF EXCEL MATIC LIQUID**  
REMOVES TOUGH STAINS IN 3 EASY STEPS.

- 1**  
**POUR**  
the liquid on the stain
- 2**  
**RUB**  
it with the scrubber cap
- 3**  
**POUR**  
the remaining liquid in the machine

Creating ritual to drive pre-treatment for stain removal in machines



**Comfort** A SMALL STEP FOR **BIG SHINE**

- ↳ Nourishes and untangles fibres damaged by washing.
- ↳ Gives clothes an unbelievable shine.

After Wash

Demystifying fabcon: Small step, Big Shine

# SUCCESSFULLY DEPLOYING WiMI LAUNDRY

MAJORITY MASS



Upgradation through mid and premium bars and powders



MAJORITY MID



Upgradation through top end formats – Matic liquid

# DEPENDING ON CONSUMER BEHAVIOUR

## LAUNDRY

### Mental Reach



Go Deep: Mental reach through outdoor, static

### Trial Generation



Forced Trials

### Physical Reach



WS + Shakti to boost Rural RTM



TV, Digital to maximise Reach



Education-led Sampling



Promoter-led demos

# DRIVING LIQUIDS WHILE STRENGTHENING THE CORE DISHWASH

## Added benefits in Bar



**Vim Anti-Smell with Pudina  
– removes malodour**

## Upgradation to Liquids



**Vim Liquid with a benefit of  
No-Residue**



# OFFER A DIFFERENTIATED BENEFIT TOILET CLEANERS

## Portfolio

Rim Block



Liquid



Powder



## Proposition

Removes Germs that cause Malodour

Clean and not smelly



Changing the benefit ladder



# BUILDING THE PURIFIERS BUSINESS

## Building the brand in Salt Removal (RO)



Removes not just germs, but also harmful chemicals in water due to pollution

## Differentiated Innovations



Pure-it with Oxy-Blast technology

## Driving Air Purifiers amid increasing consumer need

Capital has more toxic particles in its air than other major Indian metros

# DELHI IS INDIA'S ASTHMA CAPITAL

DELHI HAS BEEN THE HIGHEST RATED OF 10 MAJOR INDIAN METROS FOR PARTICULATE MATTER (PM2.5) AND PARTICULATE MATTER (PM10) CONCENTRATIONS IN 2014, EXCEEDING WHO STANDARDS BY A GREATER RISK OF 100% AND 150% RESPECTIVELY. THIS IS DUE TO THE HIGH LEVELS OF AIR POLLUTION IN THE CITY. THE AIR QUALITY INDEX (AQI) IN DELHI IS USUALLY IN THE 'VERY POOR' TO 'SEVERE' RANGE. THIS IS A MAJOR CONCERN FOR RESIDENTS AND VISITORS ALIKE. THE AIR PURIFIER IS A MUST-HAVE FOR EVERY HOME IN DELHI. IT HELPS REMOVE TOXIC PARTICLES FROM THE AIR, MAKING IT SAFER TO BREATHE. IT IS ESPECIALLY BENEFICIAL FOR PEOPLE WITH ASTHMA AND OTHER RESPIRATORY CONDITIONS. THE AIR PURIFIER IS AVAILABLE IN VARIOUS MODELS AND PRICES TO SUIT DIFFERENT BUDGETS. VISIT WWW.PUREIT.COM FOR MORE INFORMATION.



Pureit AV

# OUR STRATEGY

Drive premiumization  
& upgradation



Invest in Market  
Development



Win in channels  
of the future



Grow Profitably



# CHANNELS OF THE FUTURE

## HC in ECommerce

1.4X

Homecare shares over-indexed in ECommerce vs other channels

## Seed for Future



Fast Track Innovations through ECommerce

## Create Differentially



Keep consumer journey in ECommerce in mind while designing



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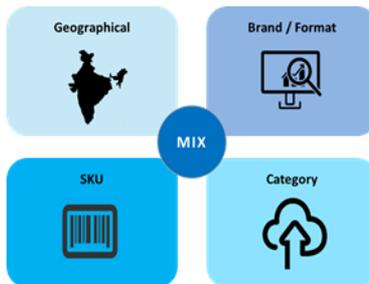
Grow Profitably



# WITH A STRONG MARGIN IMPROVEMENT PLAN



**Symphony Savings Program**



**Having a positive Mix**



**ZERO  
BASED  
BUDGETING**

**Zero Based Budgeting**



**THANK YOU!**



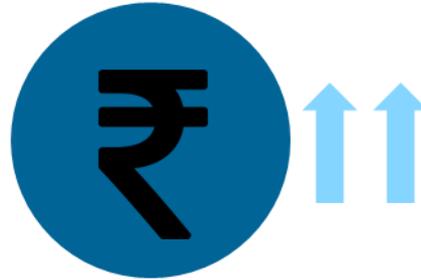
# PERSONAL CARE

SANDEEP KOHLI

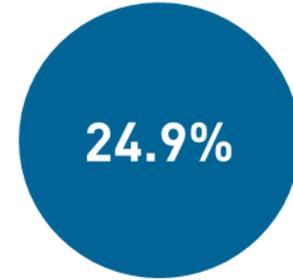
# FY 2017-18 PERFORMANCE HIGHLIGHTS



1000 crore +  
brands



Double Digit  
TO growth



Segmental Operating  
margin FY'18

# PORTFOLIO TO WIN ACROSS CHANNELS & SEGMENTS

## Core Range



## Premium Range



## Market Development Range



# HAIR CARE ACROSS SEGMENTS



Hindustan Unilever Limited

## Core Range

ज्यादा मज़बूती, ज्यादा क्लिनिक प्लस CLINIC PLUS+

20% EXTRA

CLINIC PLUS+ SHAMPOO

सिर्फ ₹149

5.5

sunsilk

सुनसिल्क

3 DAYS OF SMOOTH, FRIZZ-CONTROLLED HAIR\*\*

## Premium Range

Free your hair of pollution worries. Reverse up to 100% of pollution damage.

Dove

Dove Environmental Defence

NEW TREsemmé

**KERATIN SMOOTH**

WITH KERATIN AND ARGAN OIL

3 DAYS OF SMOOTH, FRIZZ-CONTROLLED HAIR\*\*

## Conditioners & Styling range

Shampoo gives just 50% care

Dove Conditioners, 100% care for frizz-protected hair.

Dove

Salon style starts with styling hair

NEW L'Oréal Paris Styling

L'Oréal Paris

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Drive premiumization  
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Invest in Market  
Development



Win in channels  
of the future



Build Naturals



Make core  
aspirational



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Build Naturals



Make core  
aspirational



# ACCELERATE PREMIUMIZATION

## New benefit spaces



## Leading trends



# OUR STRATEGY

Drive premiumization  
& upgradation



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Development



Win in channels  
of the future



Build Naturals



Make core  
aspirational



# INVEST IN MARKET DEVELOPMENT

## Building the Anti-perspirant market



## Driving awareness of body lotion



Vaseline AV

# MARKET DEVELOPMENT AT SCALE

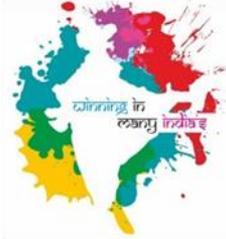


Hindustan Unilever Limited

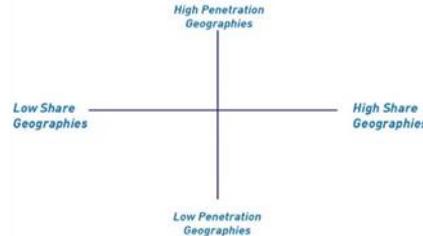
## Access Packs



## Winning in Many Indias (WiMI)



Cluster based jobs & marketing campaigns



## Sampling



Sampling in 2017 = 1.5X 2016

# OUR STRATEGY

Drive premiumization  
& upgradation



Invest in Market  
Development



Win in channels  
of the future



Build Naturals



Make core  
aspirational



# WINNING IN ECOMMERCE & DIGITAL

## Ecommerce ready content



## Exclusive packs and ranges



## Win with Winners: JBPs with all Leading Players



# CREATING BEST IN CLASS ACTIVATIONS & CONTENT ONLINE



Hindustan Unilever Limited

## Contextual targeting



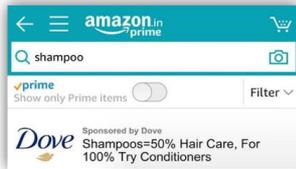
Leveraging Search



Leveraging Seasonality



Penetration through Brand Intelligence



## Content to drive conversion



# LEADING IN A DIGITAL WORLD WITH MEASURABLE METRICS



Hindustan Unilever Limited

Especially curated creatives for Social media to break the clutter



Content strategy to influence consumers online

BE BEAUTIFUL IN



*“Be the Wikipedia of Personal Care in India by answering all search queries on personal care through our brands “*

# OUR STRATEGY

Drive premiumization  
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Win in channels  
of the future



**Build Naturals**



Make core  
aspirational



# BUILDING THE NATURALS PORTFOLIO



Hindustan Unilever Limited

**indulekha®**  
*Brinjal Oil*

AYURVEDIC MEDICINE FOR HAIRFALL.  
HELPS GROW HAIR.\*

\*contains natural ingredients known to reduce hair fall and helps hair growth upto its natural potential

**CLINIC PLUS®**  
ANTI-PIPERIS TERBERIC  
FACE WASH

**Fair & Lovely®**  
ANTI-PIPERIS TERBERIC  
SHAMPOO

**Lotus flower extract**  
**Chandan**  
**Kesar**

**Milk**  
**Til Oil**  
**Manjatha**

**LUX**  
Saffron Clean

**Lifebuoy**  
Neem

**Lifebuoy**  
Turmeric

**LEVER ayush**

Solve your modern day lifestyle problems with  
**Sahi Ayurveda**

**ayush**  
ANTI-PIPERIS TERBERIC  
FACE WASH

**ayush**  
MOISTURISING  
CITY'S CARE SOAP

**LAKMÉ 9to5**  
NATURALE RANGE

**NEEYUM SAFE UN SARUMAMUM SAFE**  
SANTALWOOD OIL

**Hamam**

**NEW**

**INDULEKHA BRINGHA HAIRFALL® SHAMPOO**

9 FULL BRINGHAJ PLANT EXTRACTS IN EVERY BOTTLE.  
NO ADDED COLOUR. NO ADDED FRAGRANCE.

\*Hairfall due to breakage.

**indulekha**  
Ayurvedic Hair Care

**closeup**  
FRESH  
ATTRACTION  
NATURE FOCUS

**CARDAMOM & TULSI**

**TRESemme**  
INSPIRED BY  
**BOTANIQUE / NATURE**  
WITH OLIVE OIL AND CAMELLIA



Indulekha AV

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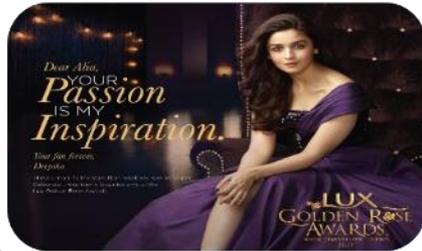


# MAKING CORE BRANDS ASPIRATIONAL



Hindustan Unilever Limited

## Skin Cleaning – Lux



## Skin Care – Fair & Lovely



## Hair Care – Sunsilk



# MAKING CORE BRANDS ASPIRATIONAL

## LIFEBUOY

### Establish superior germ kill



### Tap into Naturals trends



### Build new formats



Lifebuoy AV



**THANK YOU!**

# THANK YOU

For More Information

## VISIT OUR WEBSITE

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

### Investor Relations

#### HUL Annual Investor Meet 2018

HUL's Annual Investor Meet 2018 will be held on 6th June 2018, Wednesday, at the HUL Head Office in Mumbai

[> View more](#)

