

Transforming BPC



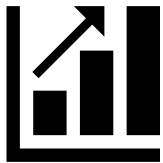
Hindustan Unilever Limited

BEAUTY &
PERSONAL CARE

Beauty & Personal Care, India

Powerhouse Business with Leading Market Positions

Consistent, Profitable Growth

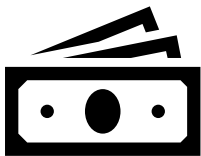


19.5k Cr

Turnover
FY'22

1.8 x

Turnover in the
Last Decade



28%

EBIT Margin
FY'22

2.2 x

Profit Improvement
in the Last Decade

Podium Positions across Categories



1 Skin Cleansing



1 Skin Care



1 Hair Care



1 Colour Cosmetics



2 Oral Care

House of Mega Brands

**7 Iconic Brands with
Turnover > 1000 Cr**



Unparalleled Scale | Highest Reach among Consumers & Customers

Highest Penetration

Serving **9 of 10** Households across Categories



Most Loved Brands & Portfolio

Topmost Brands on Brand Power



Highest Reach across Channels



9/10
General Trade Stores



10/10
Modern Trade Stores



10
D2C Websites in BPC for Premium Brands

Our Strategy to Win



**Competitive
Growth on Core**



Grow Ahead of Market



**Turbocharge
Premiumization**



Grow 2x of Market



**Lead Market
Development**

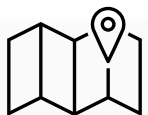


**Win in Channels
of the Future**

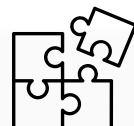


**Grow 2x of Market in MT,
Pharma & Cosmetic | 4x in E-
Commerce**

Enablers



**Winning in Many
Indias**



**Impactful
Innovations**



**Advanced Digital
Capability**



**Purpose &
Sustainability**

Competitive Growth on Core | Our 3 Key Mantras

Contemporizing Brands



Keeping Pace with changing consumer

Building Purposeful Brands & Multi Year Engagement Platforms



Building Sustainable business



Less plastic, Better plastic, Clean Ingredients & Sustainable Sourcing

NDPE: No Deforestation, No Peat, and No Exploitation

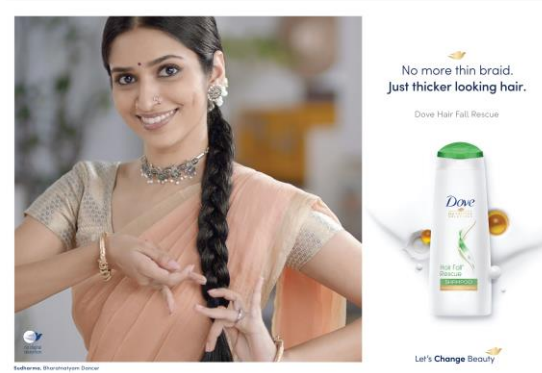
Based on Strong Fundamentals of Growth

Winning Products



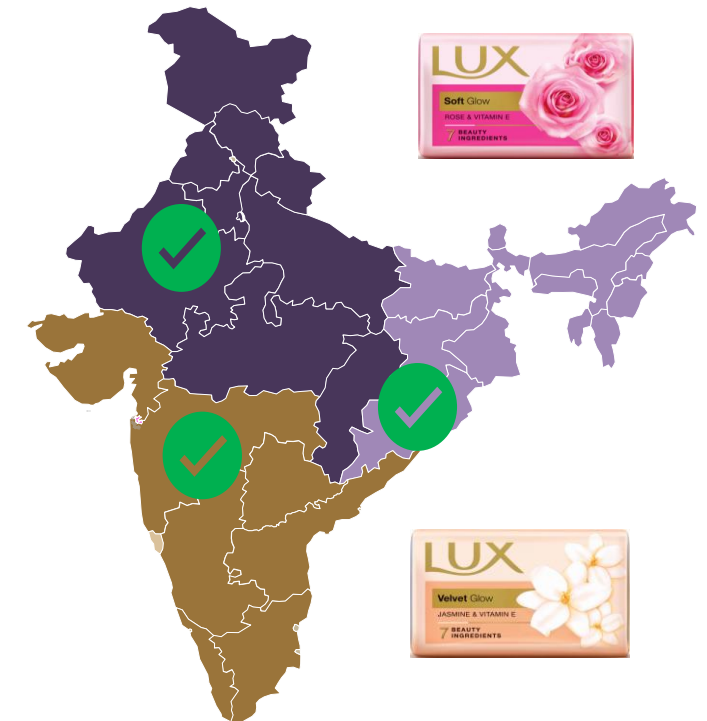
Iconic Brands Winning
vs. Competition

Winning Communication



9/10 communications rated
highly effective

Winning in Many Indias

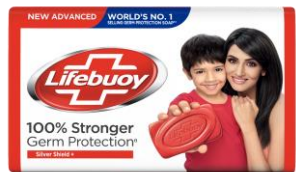


Consistent **Penetration & Share**
Gain

Turbo Charging Premiumization

SKIN CLEANSING: Transform portfolio from Core to Premium bars & driving format adoption

Core



Premiumization on Bars

Dove and Pears
Lead premium recruitment 80%
of the delta opportunity



Accelerating Liquids adoption

Body wash



Intimate hygiene



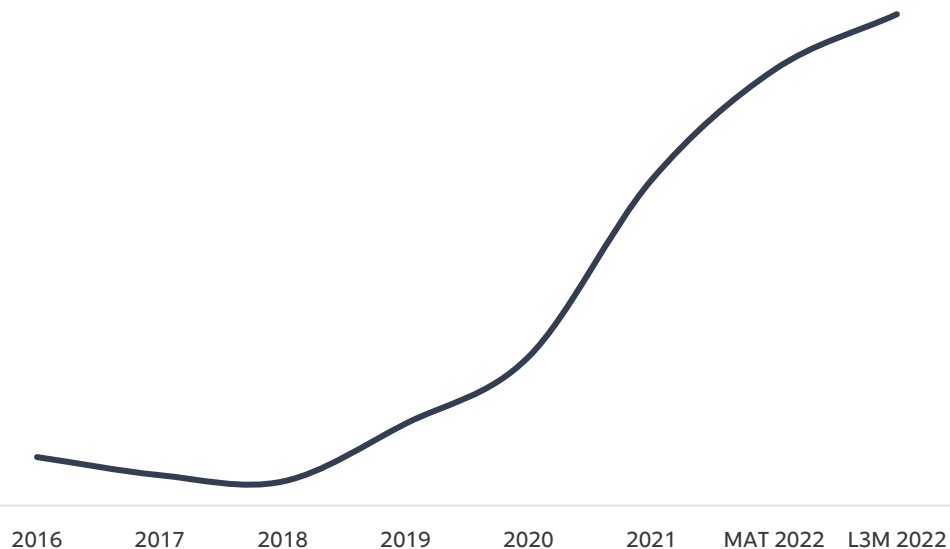
Hand hygiene



Turbo Charging Premiumization

Strengthening Leadership in Hair Care by Building a Premium Portfolio

Highest Share in Hair Care in 2 Decades
+400 bps in 3 years



We are 3x of our Largest Competitors

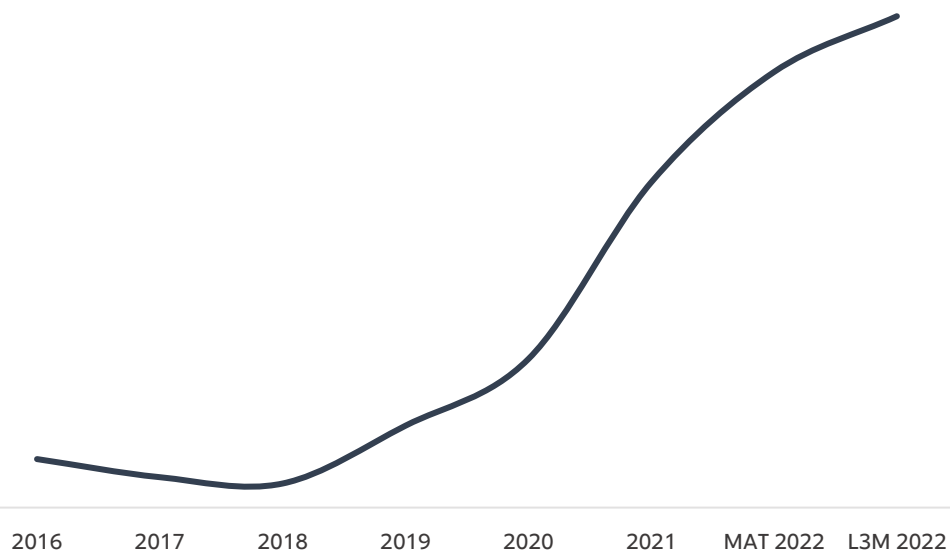
With a Swift Transformation of the Portfolio



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With a Swift Transformation of the Portfolio

To



Turbo Charging Premiumization

Skin Care Premiumization through Portfolio Transformation

Existing Demand Space



1 Tone Management



1 Hydration



1 Sun Care



1 Anti Ageing



1 Holistic Glow

Higher Order Benefits

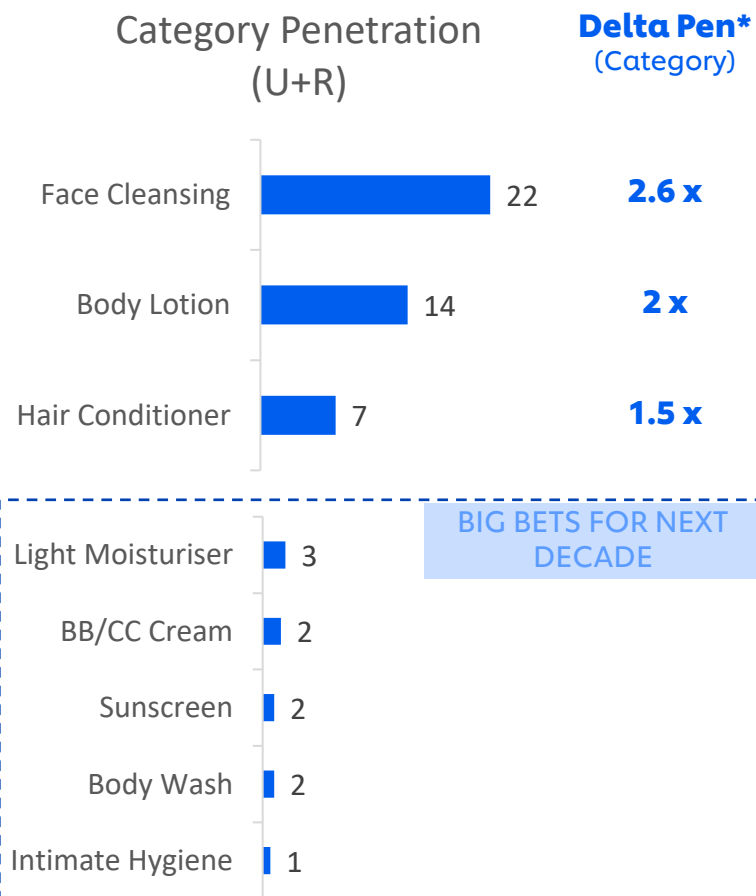


Emerging Formats



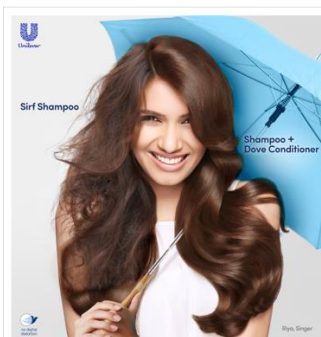
Market Development | HUL is the Market Maker for Multiple Categories

Building Category Penetration



Delta Pen* MAT'22 over FY 13 for FC, HC | MAT'22 over FY 16 for BL

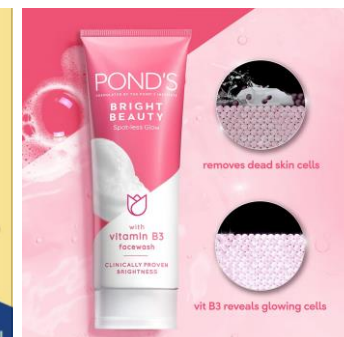
Podium Players in Building Categories



1 Hair Conditioners



1 Body Lotion



2 Face Cleansing



1 BB/CC Creams



1 Body Wash



1 Sunscreen



1 Intimate Hygiene

Market Development | Deploying Repeatable MD Model

Demos that Educate Offline | ~25 Mn Contacts



Content that Educates Online | 5x Spends



Beauty Experts at Point of Sale @ Scale



Priced @ Right premium to Source of Growth



20 million sampling/trials

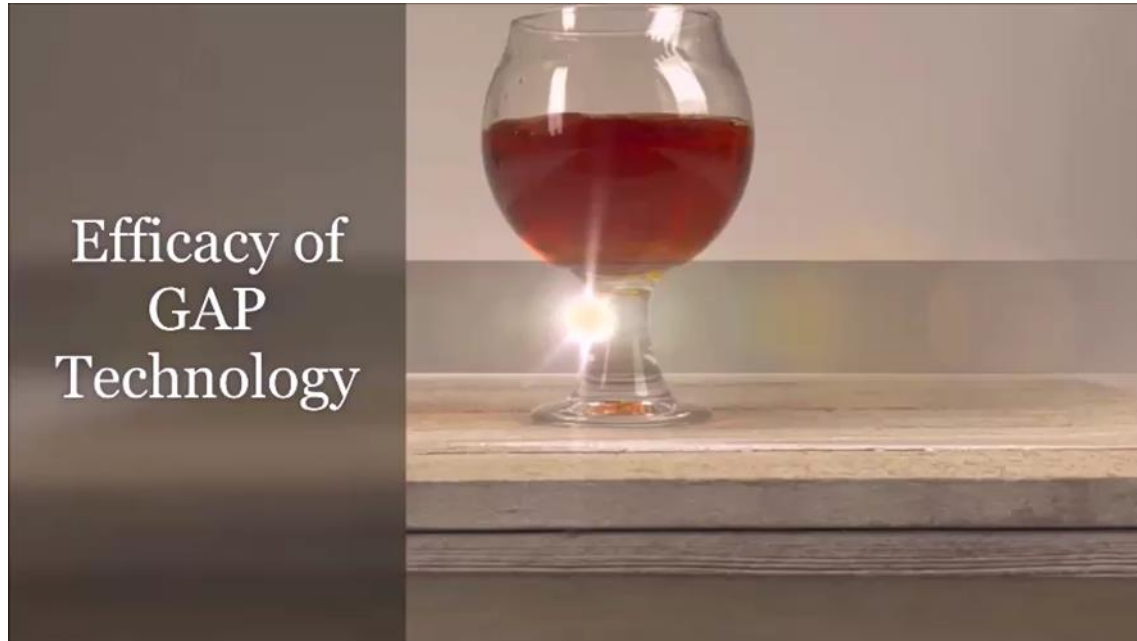
Home to Home

Influencers & Content

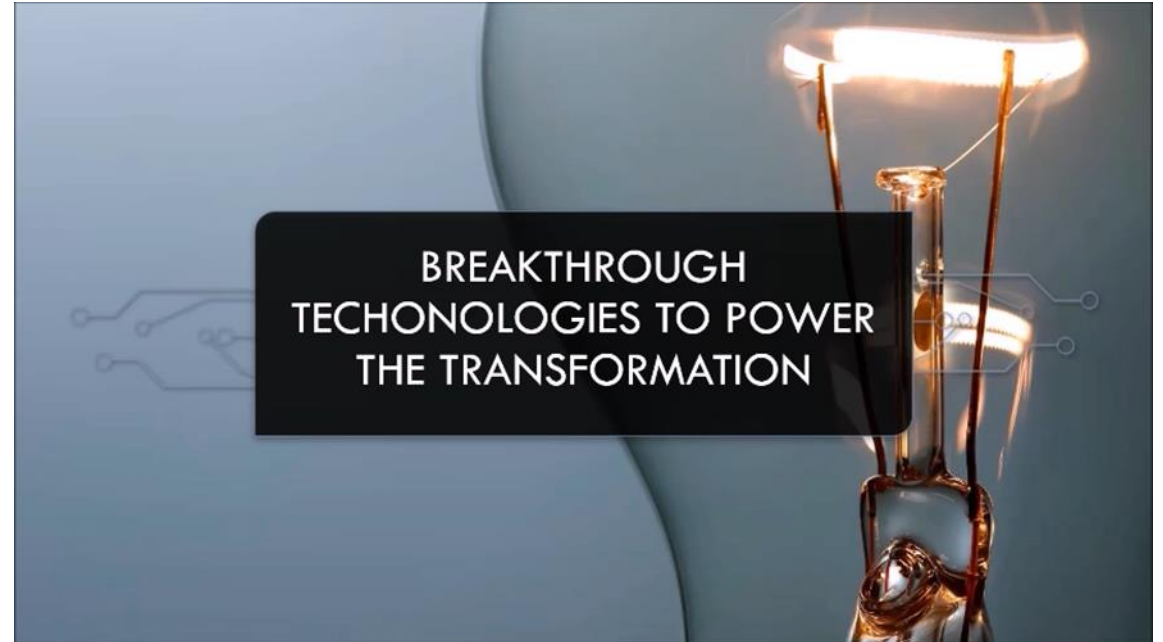
Assisted Selling

Right Pricing & Sampling

Breakthrough Technologies to Power the Transformation



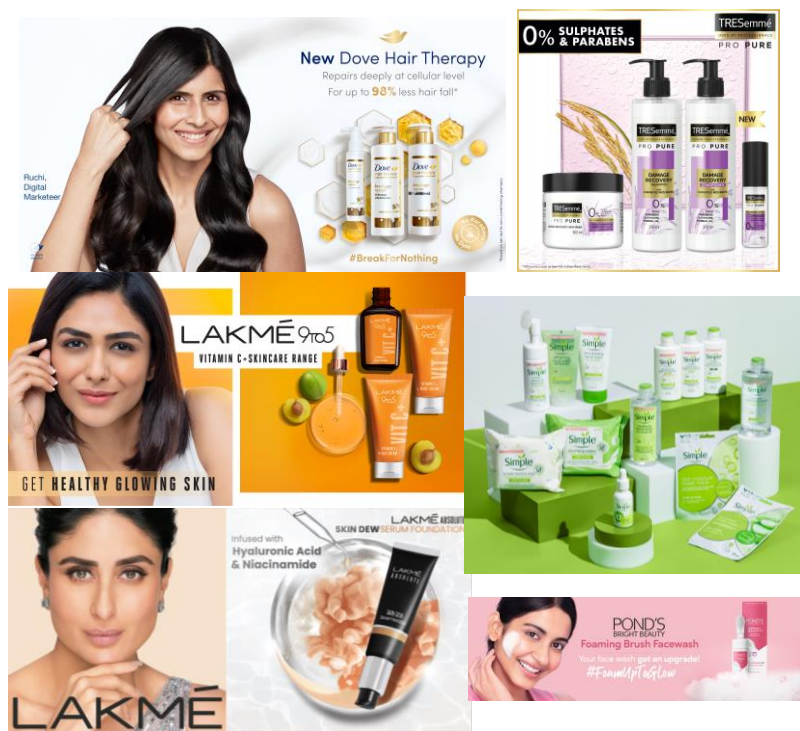
AV – GAP Technology



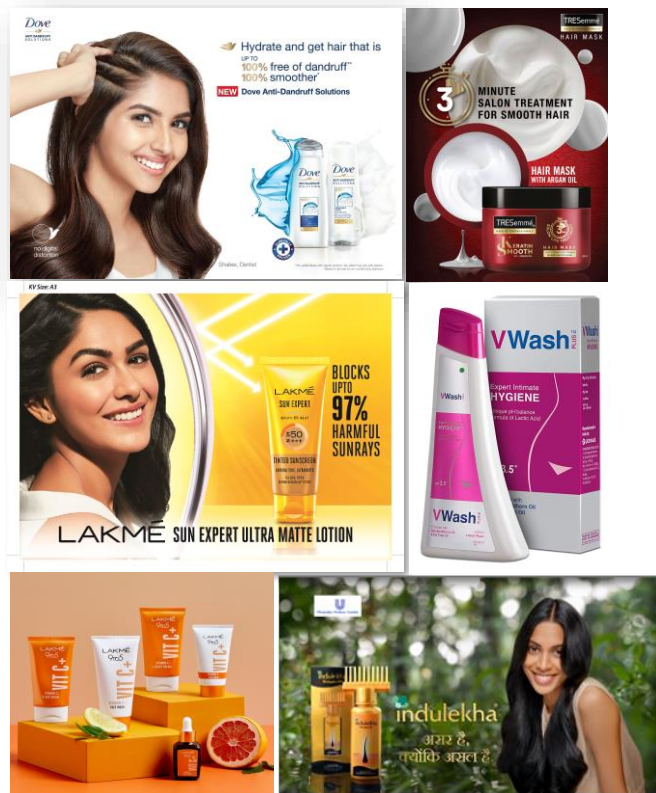
AV – Pro Lipid Technology

Innovations & Portfolio Development designed for emerging channels

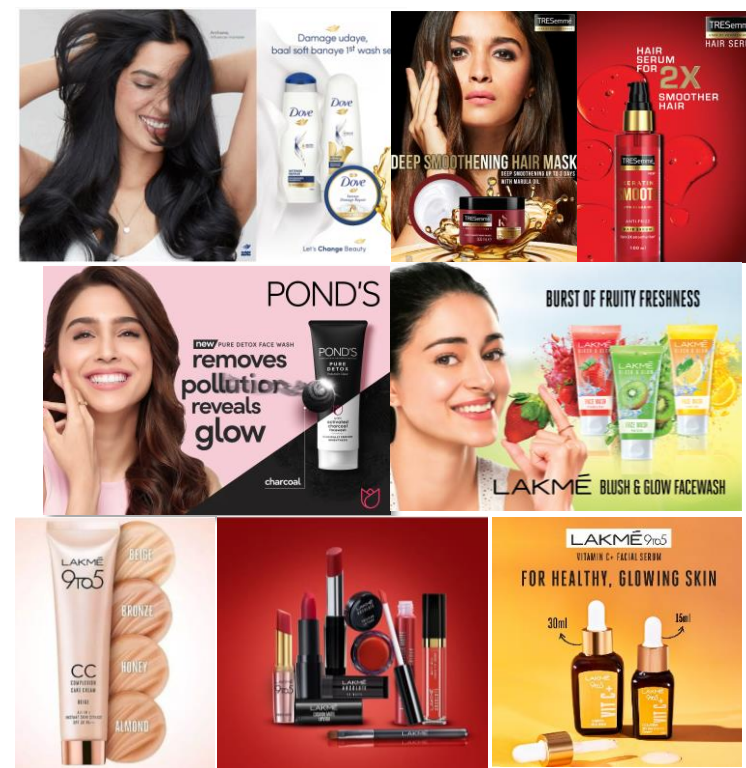
Higher Order Benefits + Formats for Modern Trade & Ecom



Problem-Solution & Ingredient Led Portfolio for Pharma/Chemist



Leading Beauty Trends in Fancy/Cosmetics



Growth in MT, Chemist, Fancy vs. Nielsen Market Growth

Best In Class Digital Practices to Build Formidable Brands

Building Portfolios Tapping into Emerging Masstige Demand Spaces



Diversifying Channel Play for Simple: D2C, Amazon, Nykaa

2x Orders @ Half the Cost

+230 Bps

D2C Scale Up, PBBU

Share Gain on Amazon

Consistently Elevating Content and Conversations on Digital



+600 Bps
Brand Awareness
(LBP, Hair)

Our Right to Win



POND'S CLINIC PLUS+ Pears®

Iconic Brands & Portfolio in right Demand Spaces



Technology & Innovations to Win in Many Indias



Developing Markets and Building Categories



High Focus on Digital & Enterprise Technology



World Class Execution in Channels & with Shoppers



TO BUILD A BEAUTY & PERSONAL CARE BUSINESS THAT MAKES PEOPLE

LOOK GREAT, FEEL GREAT, SMELL GREAT

Thank You



Hindustan Unilever Limited