



Hindustan Unilever Limited

# BEAUTY & WELLBEING | CAPITAL MARKETS DAY 2024

HARMAN DHILLON, EXECUTIVE DIRECTOR – BEAUTY & WELLBEING

# SAFE HARBOUR 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 realised. 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.





Hindustan Unilever Limited

We are  
the #

1

Beauty  
Company  
in India

Source: Nielsen, MAT Oct'24

Sensitivity: Public



# With Market Leadership across Our Categories



Hindustan Unilever Limited



**#1**

**SKIN CARE**

Relative Market Share: **4.5X**



**#1**

**HAIR CARE**

**3X**



**#1**

**COLOR COSMETICS**

**1.4X**





Hindustan Unilever Limited

**3 of 5**

Most Loved Brands across Categories

**c. 300 Mn**

Indian Households reached Annually

**#1**

Top of Mind Recall across Categories

**Fulfilling Unmet Consumer Needs Rooted in Consumer Intimacy**



# We have Built Beauty Habits in India



1<sup>ST</sup> HAIR CONDITIONER



1<sup>ST</sup> LIQUID LIPSTICK



1<sup>ST</sup> BRIGHTENING CREAM



1<sup>ST</sup> CC CREAM





Hindustan Unilever Limited

# The Indian Beauty Consumer is Rapidly Evolving







Hindustan Unilever Limited

# 01 Rising Affluence | Opportunity at Both Ends of the Spectrum

< \$ 8500 <

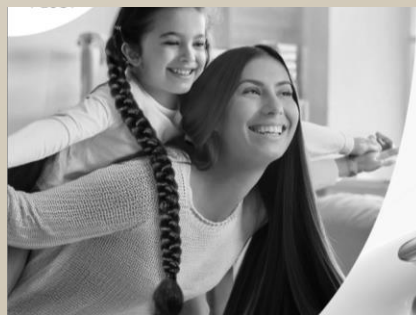
PREMIUMIZE

*Affluent*



DEVELOP THE MARKET

*Aspiring*



Source: Basis income per household in real terms, Joint report by Bain and World Economic Forum

Sensitivity: Public

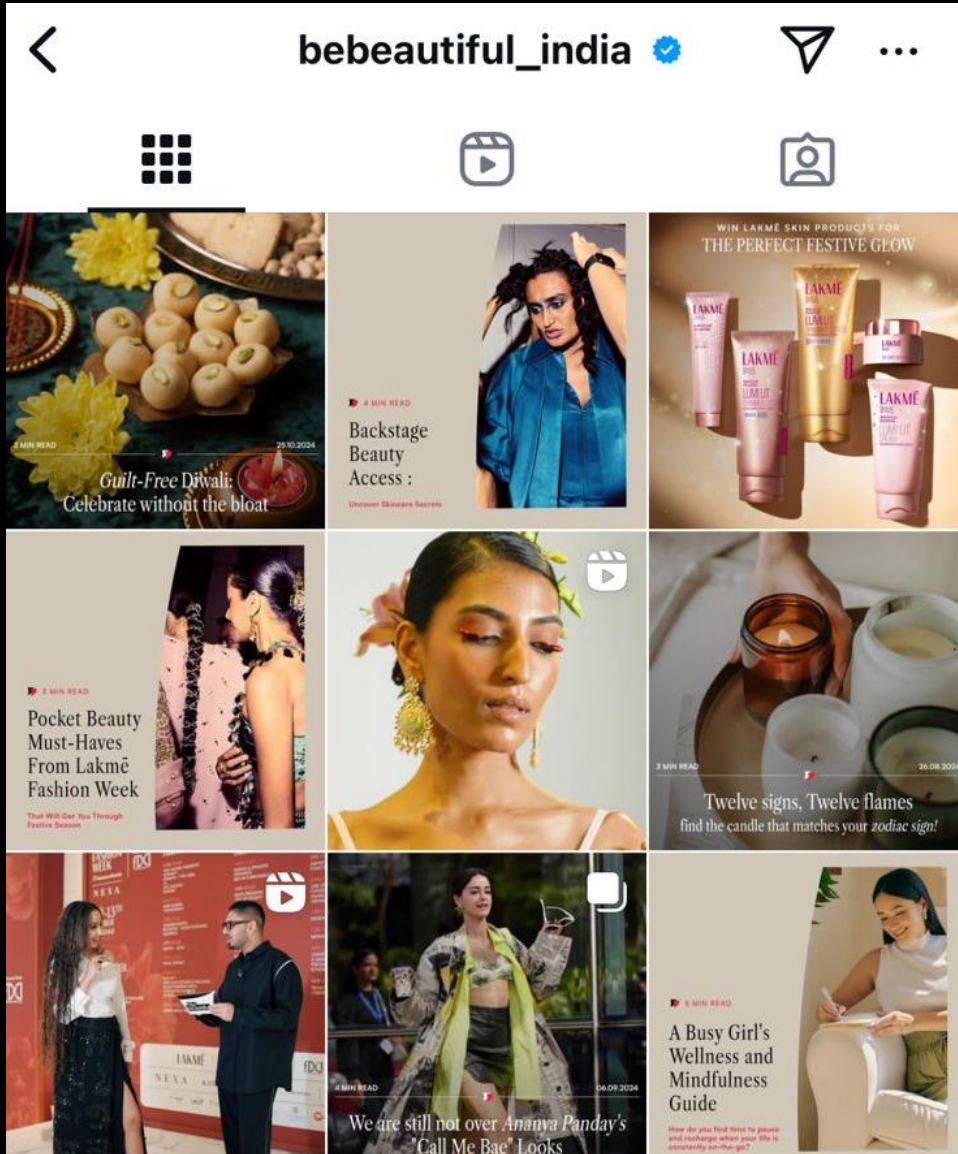




Hindustan Unilever Limited

# 02

## Democratization of Information & Expertise via Social Media



**470 Mn**  
Social Media Users

**>2.5 Hrs**  
Scrolling per Day

**8 out of 10**  
Beauty Shoppers discover brands on social media

**2 out of 3**  
Beauty Shoppers purchase products after watching IG reels

Source: OOSGA 'Social Media in India', Meta 'Unveiling New Insights To Spur the Beauty & Fashion Industry in India'

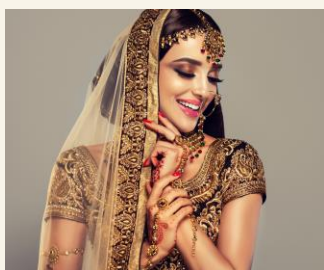


Hindustan Unilever Limited

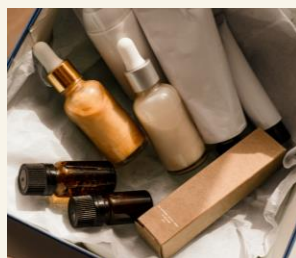
# 03 Changing Retail Landscape

## Specialization is the Name of the Game

### Enablers



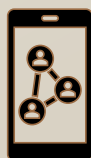
High Stake Occasions



Stepification



Convenience



**>3X**

Online CAGR (2023-2028P)  
vs. Market



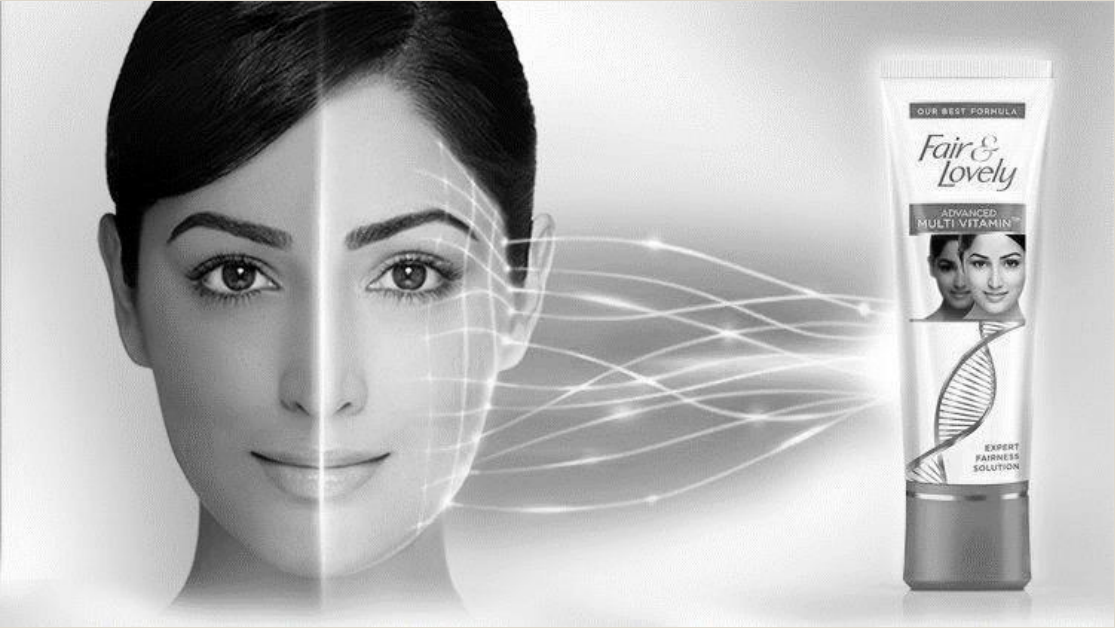
**>2X**

# of Brands in H&B  
vs. Traditional Trade





# Leading to a Decadal Shift in the Beauty Ecosystem



<2000s

Product Centric  
Single Product Regime

*One to Many*



*Many to Many*

Ecosystem Led  
Product Regime at 3X+

>2020s



WITH THE MULTISLAYER CONTOUR STICK  
IN NEUTRAL MEDIUM



BEAUTY SHOWSTOPPER  
THIS FESTIVE SZN





Hindustan Unilever Limited

**Our Vision for the Future**

**“BE THE BEAUTY  
SHAPERS FOR INDIA”**



# Leading to Our Strategy



Hindustan Unilever Limited



*Focus* **PORTFOLIO FOR  
BEAUTY**

Portfolio and formats meeting the needs of all consumer cohorts



*Excel* **MENTAL REACH FOR  
BEAUTY**

Distinctive and leading-edge capability in Media for Beauty



*Accelerate* **PHYSICAL REACH FOR  
BEAUTY**

Stepping up desire and flawless execution at point of sale

# Building the #1 Portfolio for Beauty

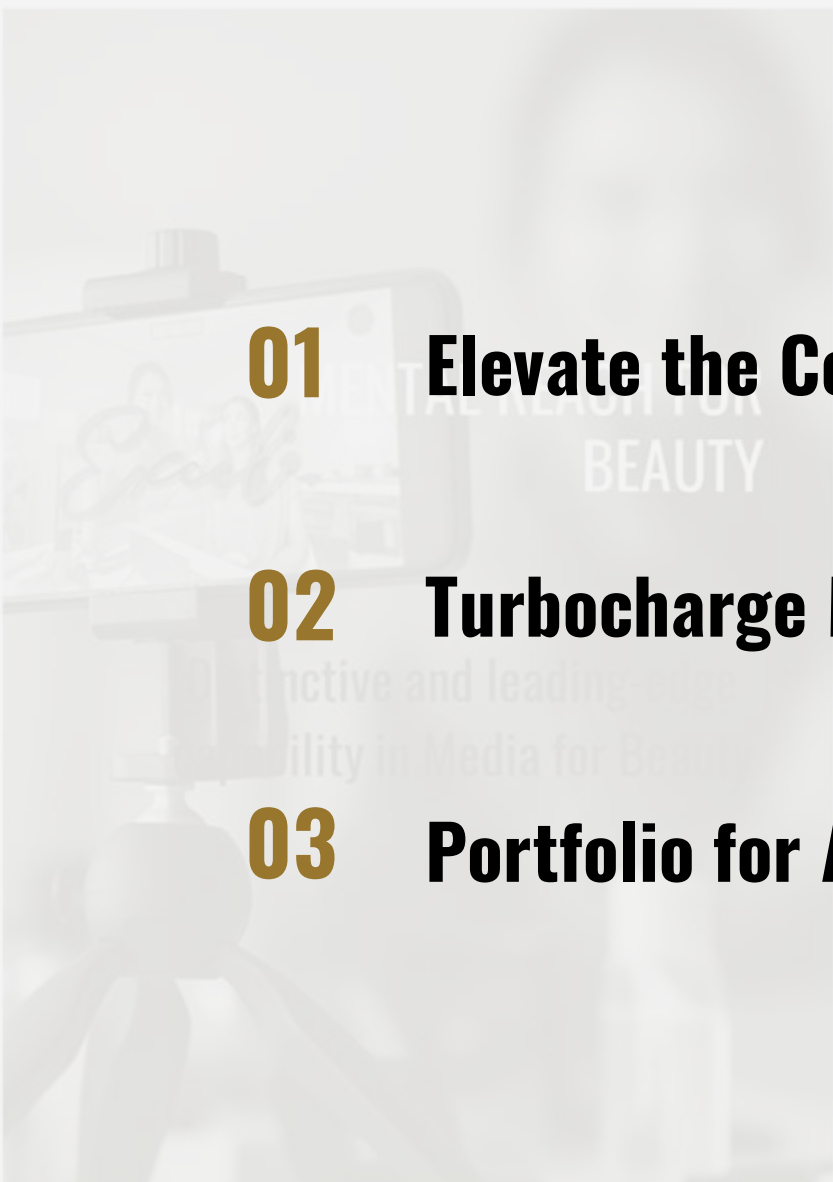


Hindustan Unilever Limited



*Focus* **PORTFOLIO FOR BEAUTY**

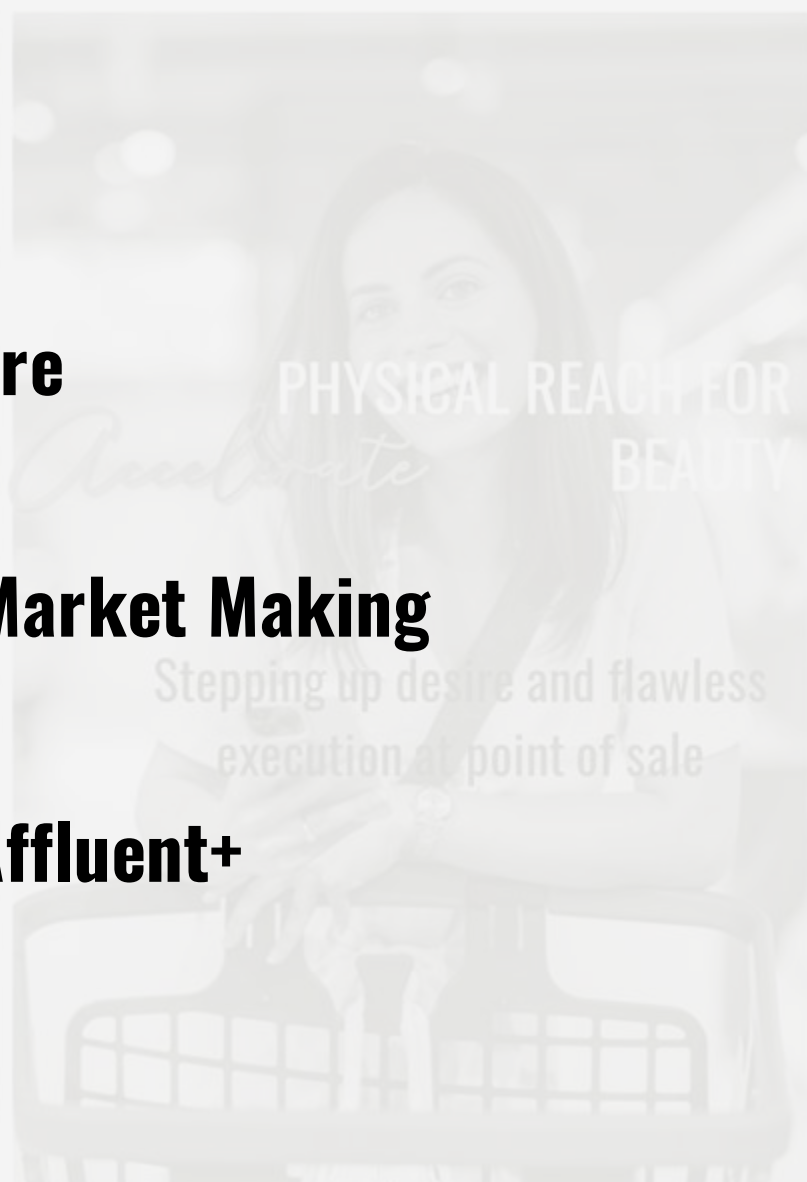
Portfolio and formats meeting the needs of all consumer cohorts



**01 Elevate the Core**

**02 Turbocharge Market Making**

**03 Portfolio for Affluent+**



*Accelerate* **PHYSICAL REACH FOR BEAUTY**

Stepping up desire and flawless execution at point of sale





Hindustan Unilever Limited

10,000 more hair strands in 8 weeks\*  
Clinically Proven

*Dove*  
scalp+  
hair  
therapy  
DENSITY BOOST

\*Basis independent clinical study on scalp serum vs baseline, 2024

# 01 Unmissable Brands with Holistic Superiority

90%

Superiority vs. Key Competitor

30+

Patented Technology in Market

50+

New Formats & Capabilities

# Superior technology is the Bedrock of our Products



Hindustan Unilever Limited



TRESemmé®

**SCIENCE LED BEAUTY SOLUTIONS**



**POWERED BY TECHNOLOGY SUPERIOR TO  
COMPETITION**





# Elevating Science & Desire in Our Brands







Hindustan Unilever Limited

**POND'S**  
SKIN INSTITUTE

**NIASORCINOL™**  
FOR ULTIMATE BRIGHT SKIN

**MIRACLES HAPPEN**

**DEWY RADIANT SKIN**  
THAT REFUSES TO STAY IN

**Vaseline**  
HEALTHY BRIGHT™  
GLUTA-HYA  
DEWY MOIST LOTION

**70X** MORE POWERFUL THAN VITAMIN C

**OVERNIGHT SUPER SERUM FOR RENEWED RADIANCE**

**0.1% PRO RETINOL + 5% PEPTIDE COMPLEX\***

**LAKMĒ**

\*Compares Active to Seroyal® Retinol, Patent® Retinol & Retinoid, respectively.

# Elevating Science & Desire in Our Brands

**TRESemmé**  
MADE BY PROFESSIONALS

**NEW LAMELLAR GLOSS**

GET **8X** GLOSSY HAIR\*

**NEW**

**10-in-1 DEEP REPAIR HAIR MASK**  
Reverses 3 Years of Damage\*

**Dove**

**Grows new hair**  
Treat hairfall at the root.

**indulekha**





Hindustan Unilever Limited



**Ponds AV**



**Tresemme AV**

# 02 The Consumer is Evolving & Seeking more Regime



Hindustan Unilever Limited

**Huge Market Development** opportunity in the **Penetration Continuum** →

100%

*Shampoo*

*Brightening*

*Body Lotions*

*Face Cleanser*

*Moisturization*

*Serums & Treatments*

*Sun Care*



0%





Hindustan Unilever Limited

# 02 Disproportionate Investments to Build 6 High Growth Segments



**FACE CLEANSING**



**LIGHT MOISTURIZER**



**SERUMS & TREATMENTS**



**SUN CARE**



**DESEASONALISE BODY**



**MASSTIGE**

# With a Portfolio to meet needs of all Consumer Cohorts



Hindustan Unilever Limited

*Affluent India*

**Premiumize** with Elevated Demand Spaces

*Aspiring India*

**Market Development** through Access & Education

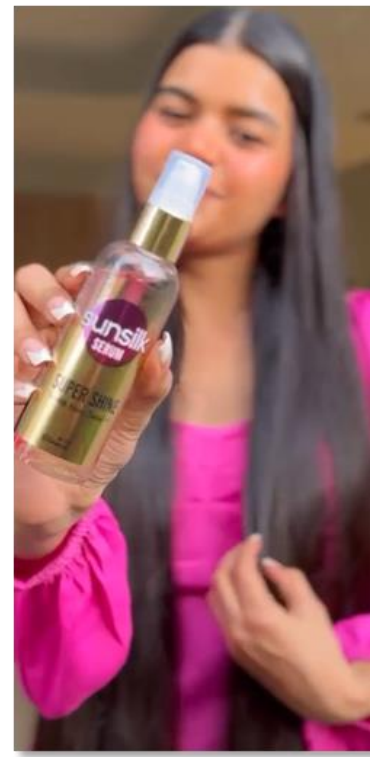




# And Differentiated Market Making Playbooks

*Affluent*

With Authority, Advocacy & Specialized Channel Focus



*Aspirers*

With Persuasive Communication, Access made Available & Sampling at Scale



Hindustan Unilever Limited

# 03 Newest Addition to our Portfolio | Masstige+ Brands addressing Opportunities with the Affluent+ Consumer



Clean Beauty



Professional Hair Care



Therapeutic/Derma Care



Wellbeing

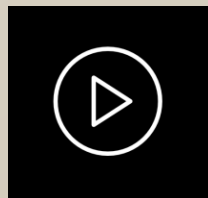


Prestige

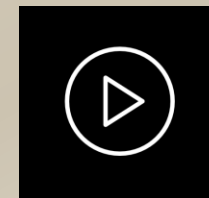




Hindustan Unilever Limited



**Nexus AV**



**Novology AV**

# Enviably Portfolio designed to Win In Beauty



Hindustan Unilever Limited

**dermalogica**

NEXXUS  
NEW YORK

NOVOLOGY  
CO-CREATED WITH DERMATOLOGISTS

LIQUID IV.

*Affluent*

Simple

LOVE beauty AND planet

oZIVA<sup>®</sup>  
Clean, Plant Based

LAKMĒ

TRESemmé  
USED BY PROFESSIONALS

indulekha

*Aspirers*

POND'S  
SKIN INSTITUTE

Vaseline

Dove

Glow & Lovely

CLINIC  
PLUS+

sunsilk

Across

01

Price Tiers

02

Demand Spaces

03

Formats



# Leading the Curve on Media for Beauty



Hindustan Unilever Limited



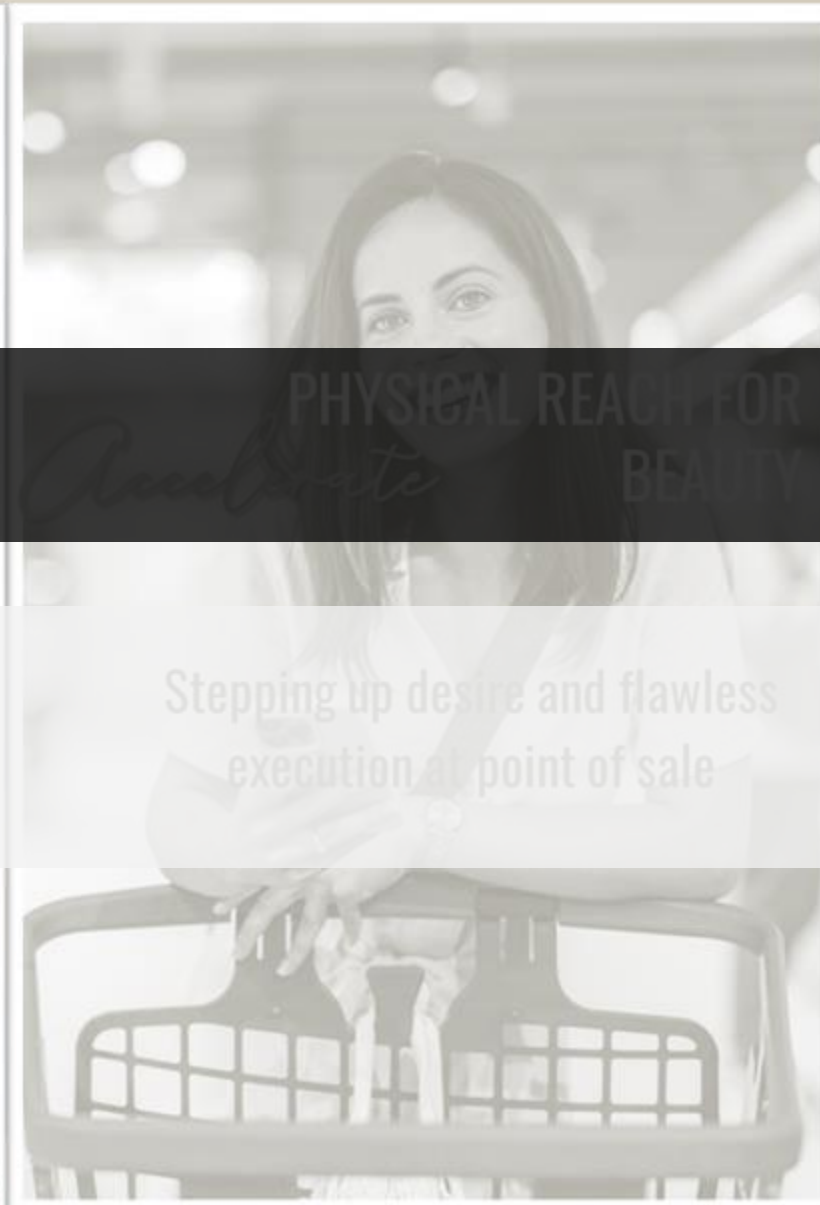
*Focus* PORTFOLIO FOR BEAUTY

Portfolio and formats meeting the needs of all consumer cohorts



*Excel* MENTAL REACH FOR BEAUTY

Distinctive and leading-edge capability in Media for Beauty



*Accelerate* PHYSICAL REACH FOR BEAUTY

Stepping up desire and flawless execution at point of sale

# Pivoting to Media Models of the Future

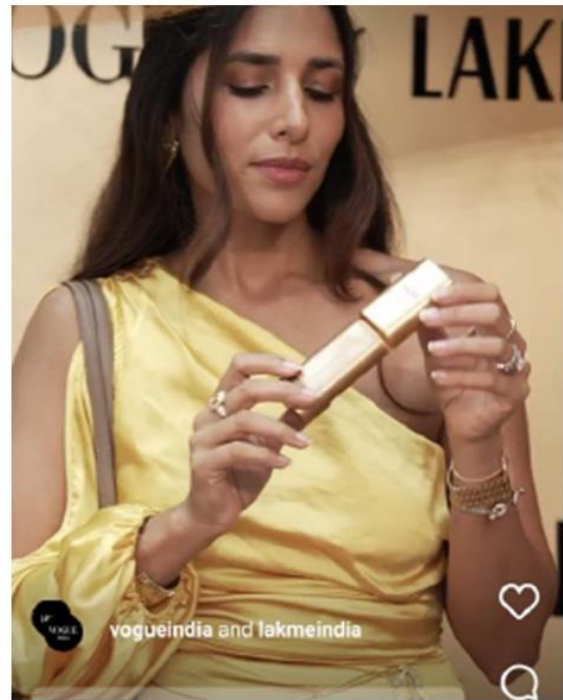


Hindustan Unilever Limited

*Content that  
Converts*



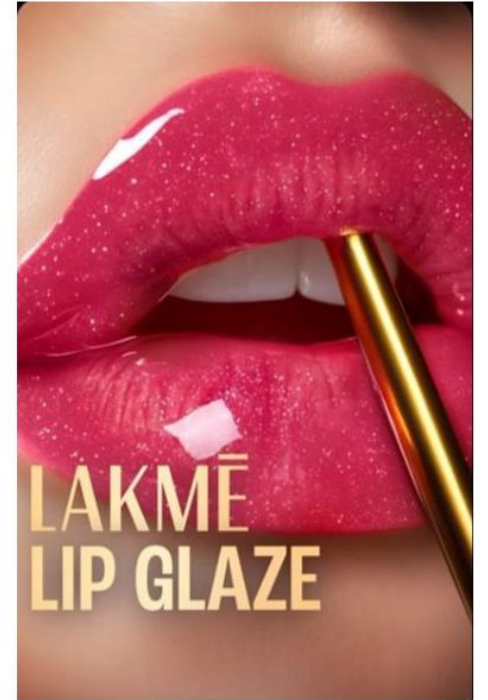
*Social Rich  
Media Mix*



*Beauty  
Advocacy*



*Ad & Tech  
Enabled*



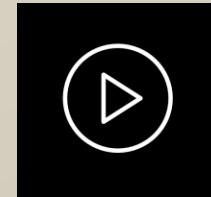


# Building Long-Term Equities in Beauty with Content that Converts





Hindustan Unilever Limited



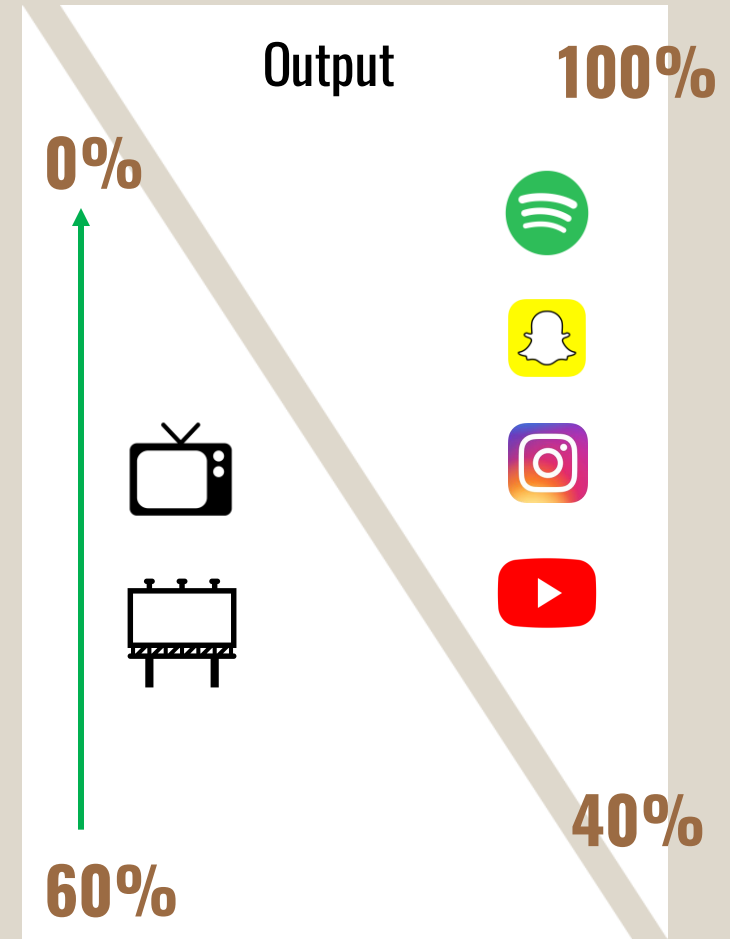
Dove AV



# Pivoting to a Social Rich Media Mix | Digital > TV



Hindustan Unilever Limited



# And a Strong Ecosystem for Beauty with Advocacy & Authority

#1

Beauty Influencer ecosystem in India



Partnership with Voices of

*Authority*

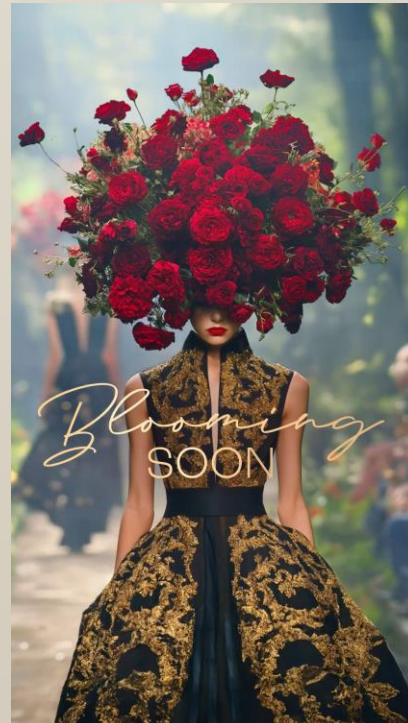
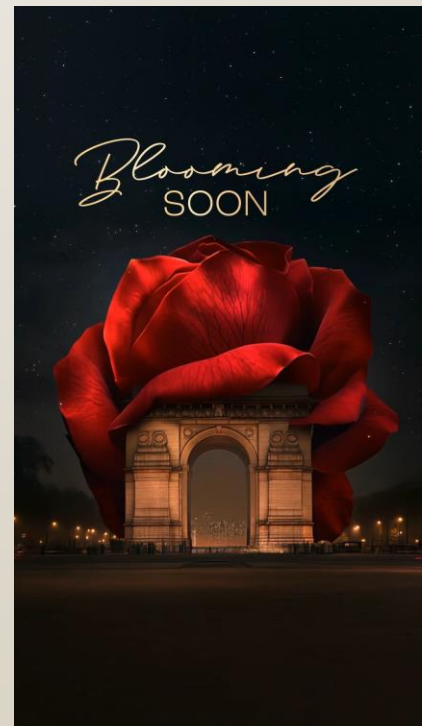






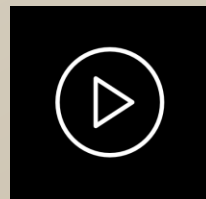
Hindustan Unilever Limited

# Enabled by AI & Beauty Tech to enhance the Consumer Experience





Hindustan Unilever Limited



**TY AV**



# Building Competitive Moats on Channels for Beauty



Hindustan Unilever Limited

*Dove*

*Focus* PORTFOLIO FOR BEAUTY

Portfolio and formats meeting the needs of all consumer cohorts

*Salience* DIGITAL REACH FOR BEAUTY

Interactive and leading-edge capability in Media for Beauty

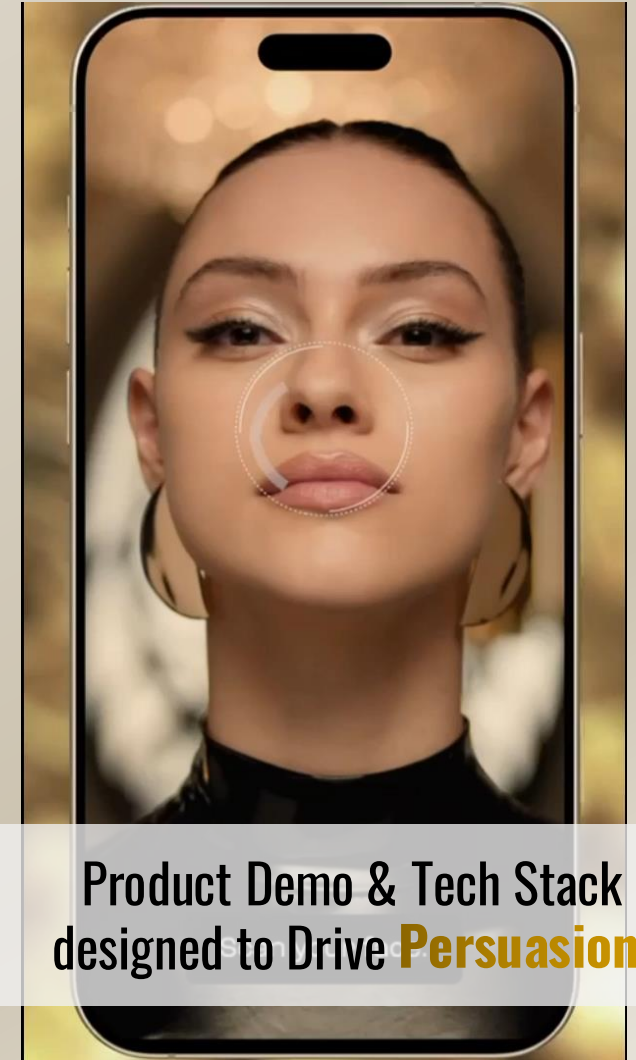
*Accelerate* PHYSICAL REACH FOR BEAUTY

Stepping up desire and flawless execution at point of sale

# Affluent Shopper in Specialized Channels seeking Regime



Hindustan Unilever Limited





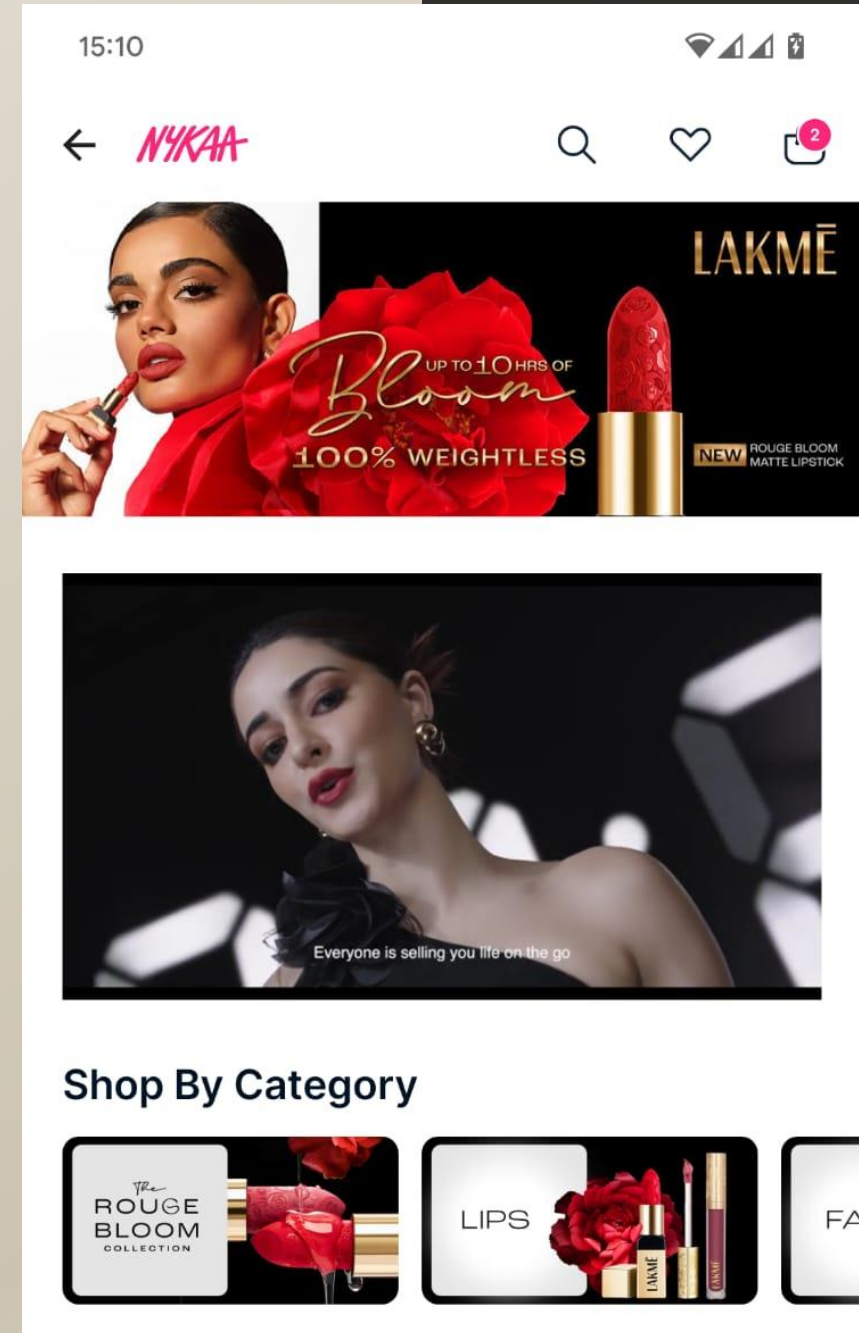
# Building Curated Route to Market for Beauty

*Offline*

c. 70% Affluent+ Households in Top 88 Towns

*Online*

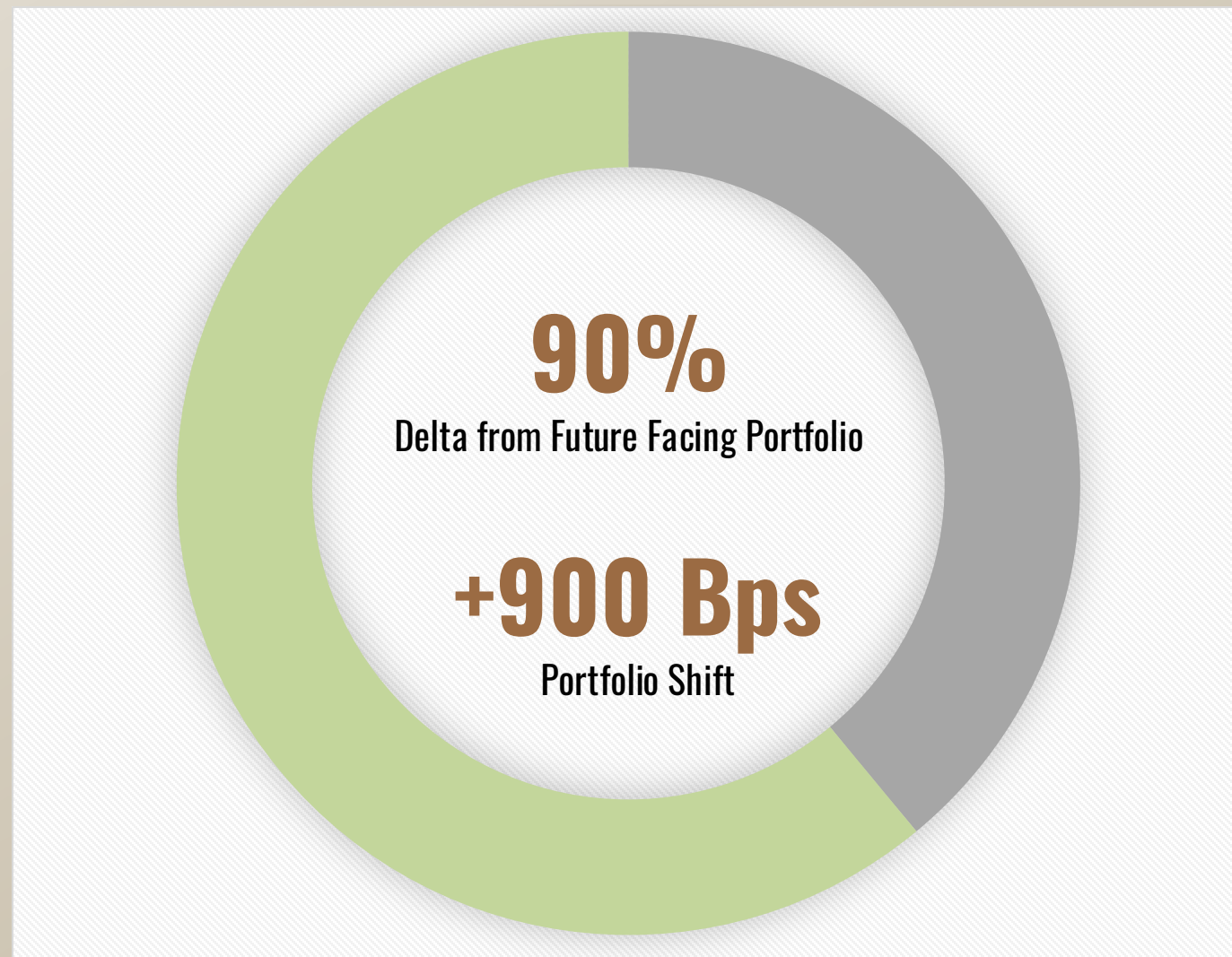
100% Specialist Beauty Business in eCommerce





Hindustan Unilever Limited


# Leading to a Future Facing Portfolio in High Growth Spaces







# HUL: India's #1 Beauty Company and Our Best is yet to Come



**#1 PORTFOLIO FOR BEAUTY**

Portfolio and formats meeting the needs of all consumer cohorts



**#1 MENTAL REACH FOR BEAUTY**

Distinctive and leading-edge capability in Media for Beauty



**#1 PHYSICAL REACH FOR BEAUTY**

Stepping up desire and flawless execution at point of sale



Hindustan Unilever Limited

# THE BEAUTY SHAPERS FOR INDIA



**THANK YOU**



Hindustan Unilever Limited