



*Hindustan Unilever Limited*

# HOME CARE

**Srinandan Sundaram**

Executive Director, Home Care

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# 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.

# A DECADE OF VALUE CREATION



Hindustan Unilever Limited

## STRONG TRACK RECORD 2013-23





**2.8x**  
Turnover

**10x**  
Profit

**+580BPS**  
MS VAL

Source:  
Financial data for Calendar Year  
Market share as per Nielsen  
Sensitivity: Public

## FULL PORTFOLIO PLAY

 Capsule  Liquid  Powder  Bar



 Liquid  Powder  Bar



 Powder  Bar



  
Liquid  
Contribution

2013

**X**

2023

**3x**



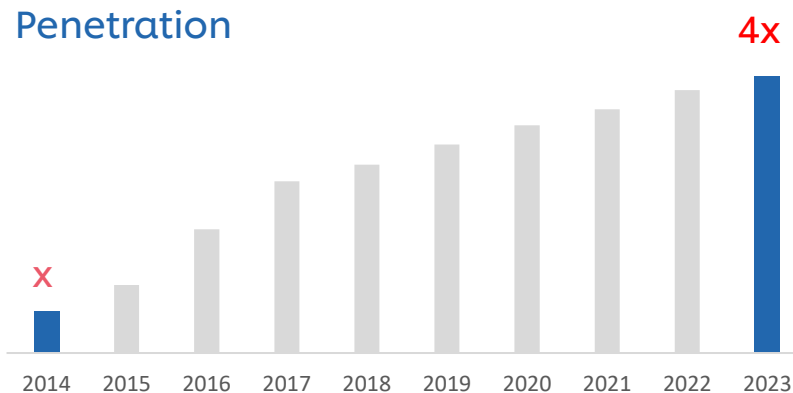
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# BUILT PREMIUM POWDER

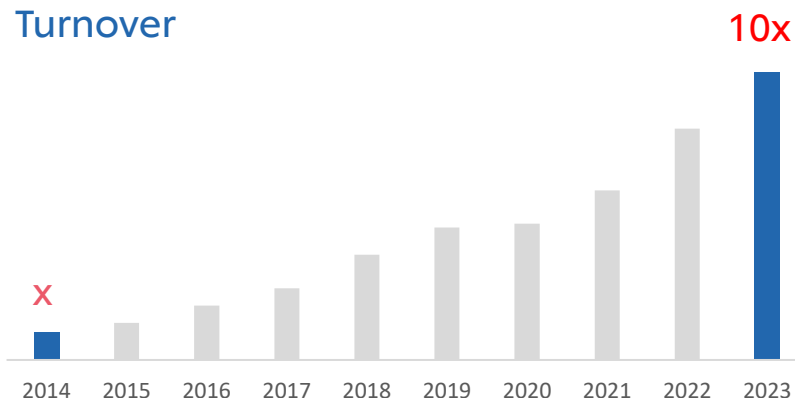
IN **FABRIC CLEANING** WITH **\$1Bn**



Penetration



Turnover



Source:  
Penetration as per Kantar , MAT Dec'23 (All India Urban)  
Data for Surf Excel Easy Wash Powders for Calendar Year

Sensitivity: Public







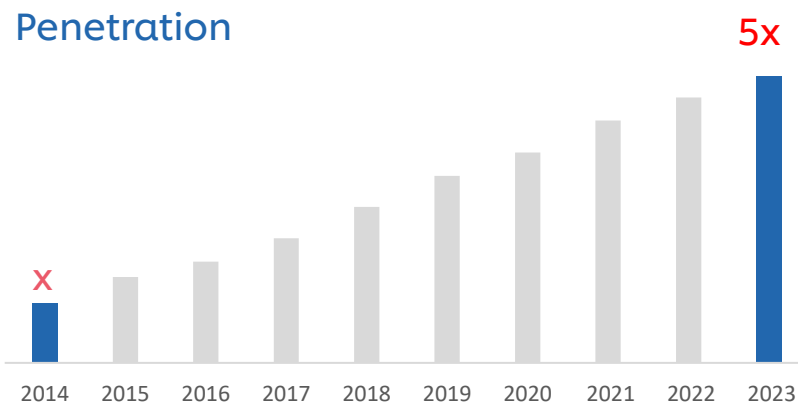
Hindustan Unilever Limited

# PIONEERED NEW CATEGORY

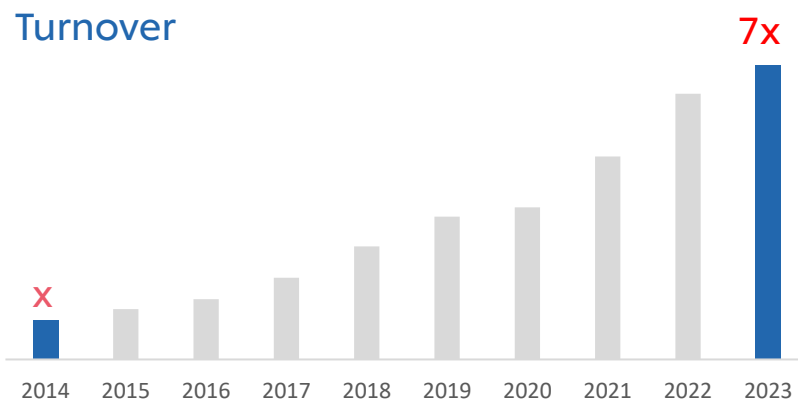
OF **FABRIC ENHANCERS** WITH

# Comfort

Penetration



Turnover



Source:  
Penetration as per Kantar , MAT Dec'23 (All India Urban)  
Data for Calendar Year  
Sensitivity: Public

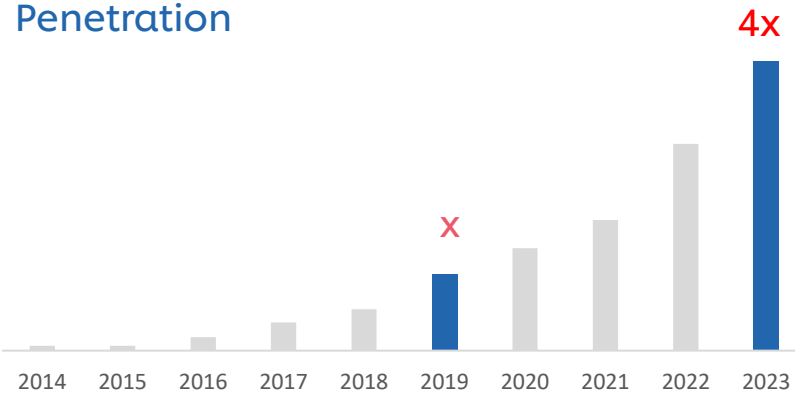


# BUILT LIQUIDS FORMAT

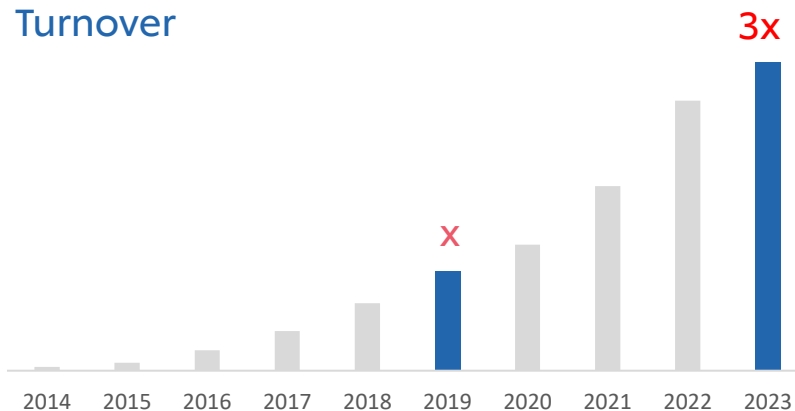
IN **FABRIC CLEANING** WITH



Penetration



Turnover



Source:  
Penetration as per Kantar , MAT Dec'23 (All India Urban)  
Data for Surf Excel Liquids for Calendar Year

Sensitivity: Public





# LEARNINGS FROM THE LAST DECADE



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**CREATE  
PORTFOLIO**



**PIONEER  
PREMIUMIZATION**



**EXCELLENCE  
IN EXECUTION**

## UNMISSABLE BRAND SUPERIORITY



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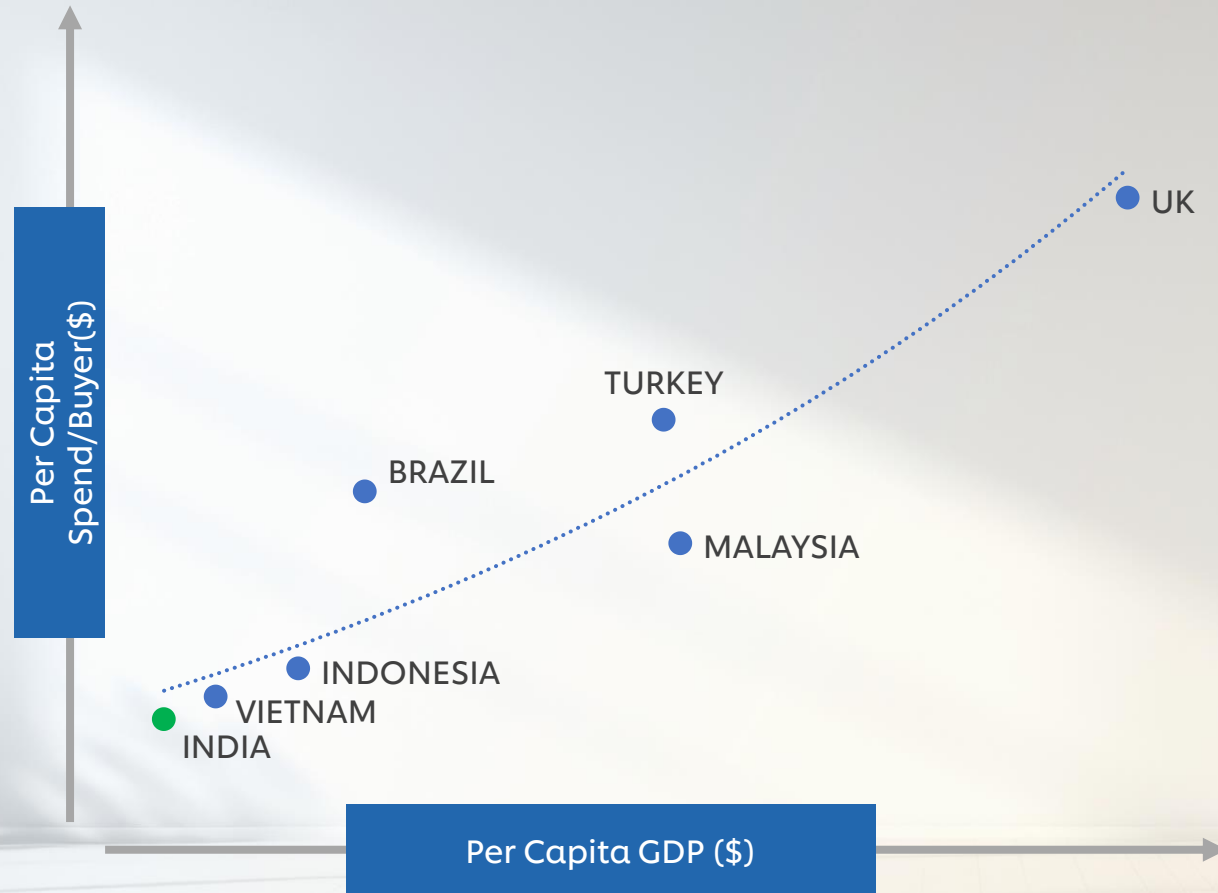
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**HOME CARE**

**THE NEXT DECADE**



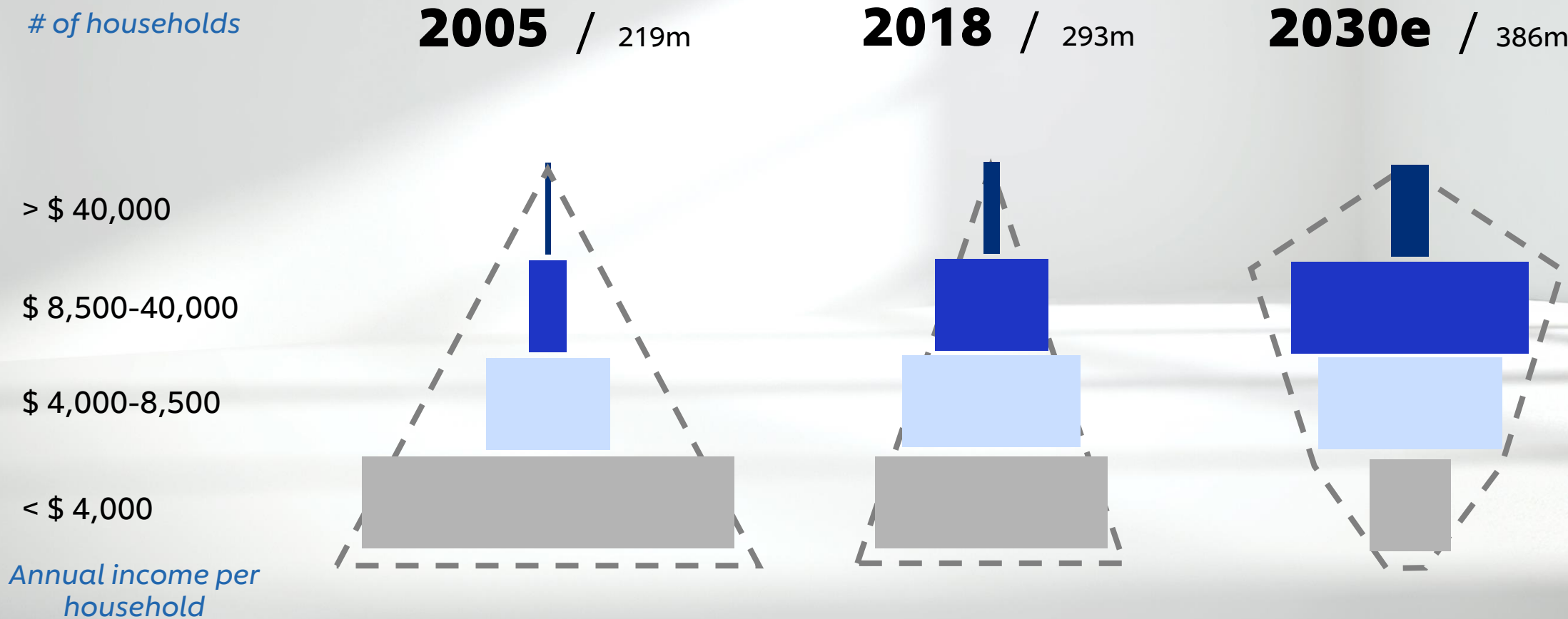
# INDIA POISED FOR ACCELERATED GROWTH



## HUGE HEADROOM FOR GROWTH

# AS CONSUMERS INCOMES GROW

Consumer Pyramid will transform to Diamond as income grows



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

# AND BRING WITH THEM HIGHER SPENDING POWER OUR PORTFOLIO IS WELL-POSITIONED TO WIN

## RISING AFFLUENCE - HIGHER SPENDS

SPENDS ON HC  
/YEAR/HH

AFFLUENT+	2.0x
AFFLUENT	1.6x
ASPIRER	1.3x
STRIVER	x

**X TO 2X PER HH SPENDS**

## PREMIUMIZATION - HIGHER SHARE GAIN

SEGEMENTAL  
VAL SHARE

	3.1x
	1.4x
	x

**IT'S A TAILWIND**



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Source:  
Kantar data from Oct 2023 to Sept 2024;  
Nielsen MAT Sept ' 2024  
Sensitivity: Public





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NEXT DECADE IS ABOUT  
**MARKET MAKING IN LIQUIDS**

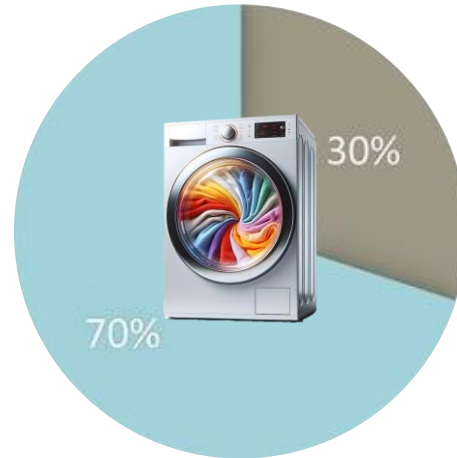
# CONSUMER'S LAUNDRY EXPECTATIONS ARE EVOLVING



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WIDER  
WARDROBES



Washing machine Households  
predominantly use Machine

MORE LOADS  
WASHED IN WM



CONVENIENCE  
IS KEY



HIGH STAIN  
INCIDENCE



# JOB TO BE DONE: GETTING MACHINE HOUSEHOLDS TO USE LIQUIDS



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**304 Mn**

Households  
in India



**68 Mn**

Households  
with Machine



**17 Mn**

Households  
using Liquids in Machine



# WITH OUR MARKET MAKING PORTFOLIO TO WIN ACROSS INDIA'S EVOLVING NEEDS...



**NEW RIN MATIC**  
**BRIGHT LIKE NEW**



Why?



Multiple washes in a machine leads to fading of clothes

What?

Superior product with Bright Lock Technology  
Keeps clothes "Bright like new"

How?



Strong Assets



Brought alive through daily serials



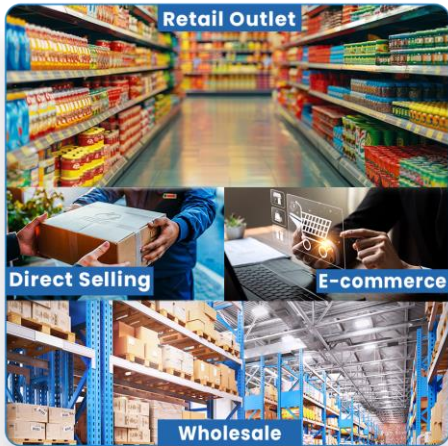
# MULTI YEAR MARKET MAKING VIA EXCELLENCE IN EXECUTION



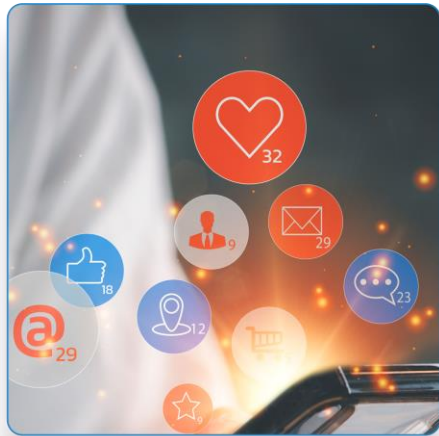
Large Scale  
Sampling



Partnerships



Design for  
Channel



Social First





Want to understand the **secret recipe**  
that makes this happen?



Sampling AV

# FIRST MOVER ADVANTAGE: ESTABLISHING EXPERTISE VIA MACHINE MANUFACTURE TIE-UPS

## PARTNERING WITH MFG & RETAILERS



**vijay sales**

## RECO FROM PARTNERS

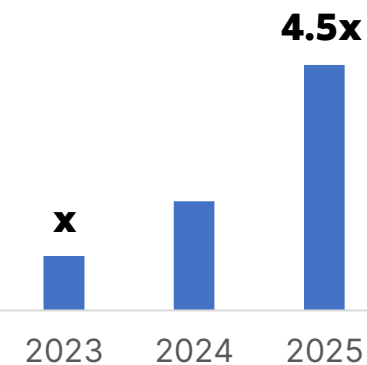


Joint TVC and Digital Comms



Sticker Branding on Machine

## SAMPLING





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Surf Excel - Whirlpool AV



# DESIGNED FOR CHANNEL: SURF EXCEL LIQUID





# SOCIAL FIRST DEMAND GENERATION WITH 2X DIGITAL SPEND LEVERAGING CRICKET

## 360° Activation







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The advertisement features a group of young cricket players in white uniforms, heavily stained with brown dirt, walking on a field. A man in a blue vest and white shirt, likely a coach, walks alongside them. In the foreground, a large bottle of Surf Excel Top Load detergent is shown, with a label that reads 'NEW FORMULA' and 'REMOVES TOUGH DRIED STAINS\*'. The text 'Surf excel MATIC' is visible on the bottle. The background shows a cricket stadium with a large light tower.

**Surf excel MATIC** | **DAAG ACHHE HAIN**

चुनिंदा सूखे दागों और कपड़ों पर किए गए लैब परीक्षण पर आधारित  
If we get stained for this soil, then dirt is good.



Surf Excel – Dravid World Cup AV



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Surf Excel – Gambhir World Cup AV





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**HOME CARE**

**BUILDING THE  
VIM MASTERBRAND**

# VIM PREMIUMIZING ACROSS DISHWASH FORMATS



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AND EXTENDING ITS EQUITY



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**REMOVES  
TOUGH  
FLOOR STAINS  
100%**





# WINNING IN NEXT DECADE BY EXPANDING MARKET LEADERSHIP IN SEGMENTS OF THE FUTURE



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**THANK YOU**