



Hindustan Unilever Limited

Capital Markets Day
29th November 2024

PERSONAL CARE...

VIPUL MATHUR

Executive Director, Personal Care



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.



PC AV



Hindustan Unilever Limited

We are a Powerhouse Franchise and #1 PC business in the country



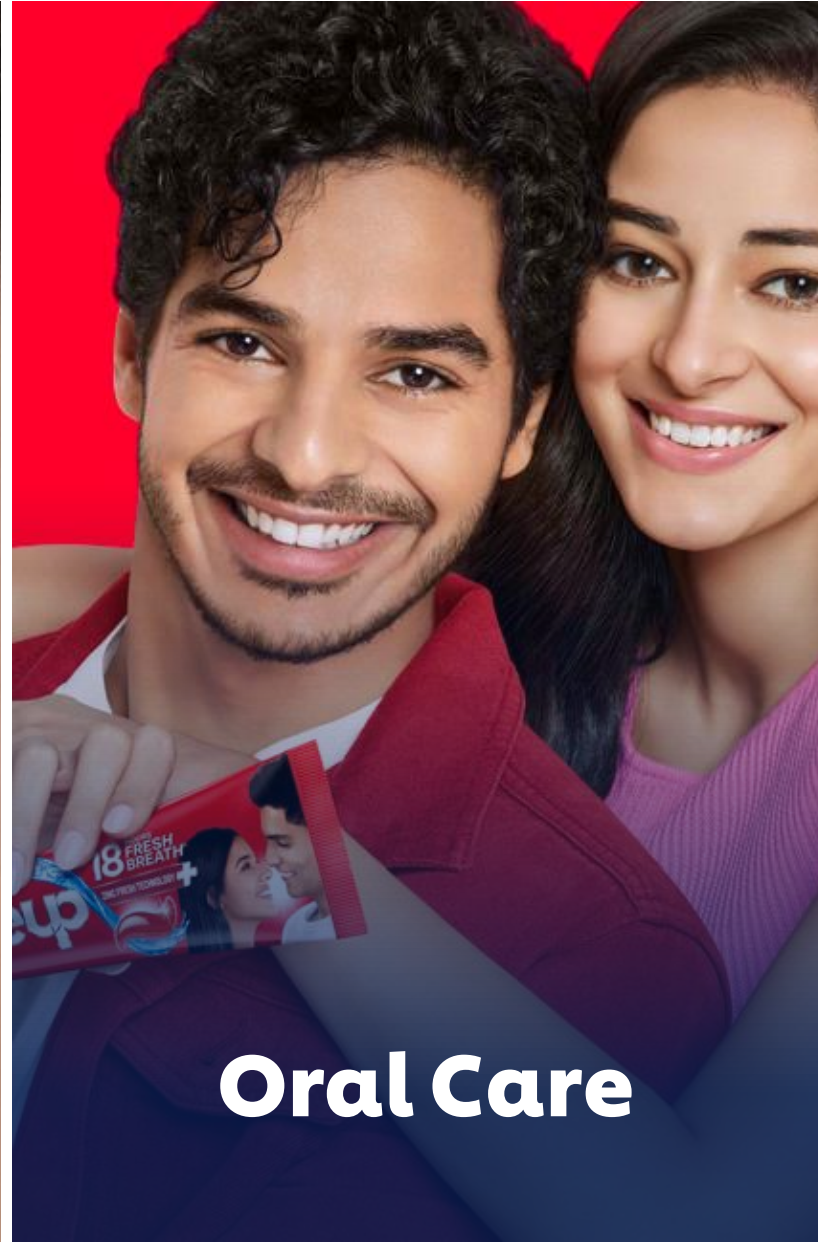
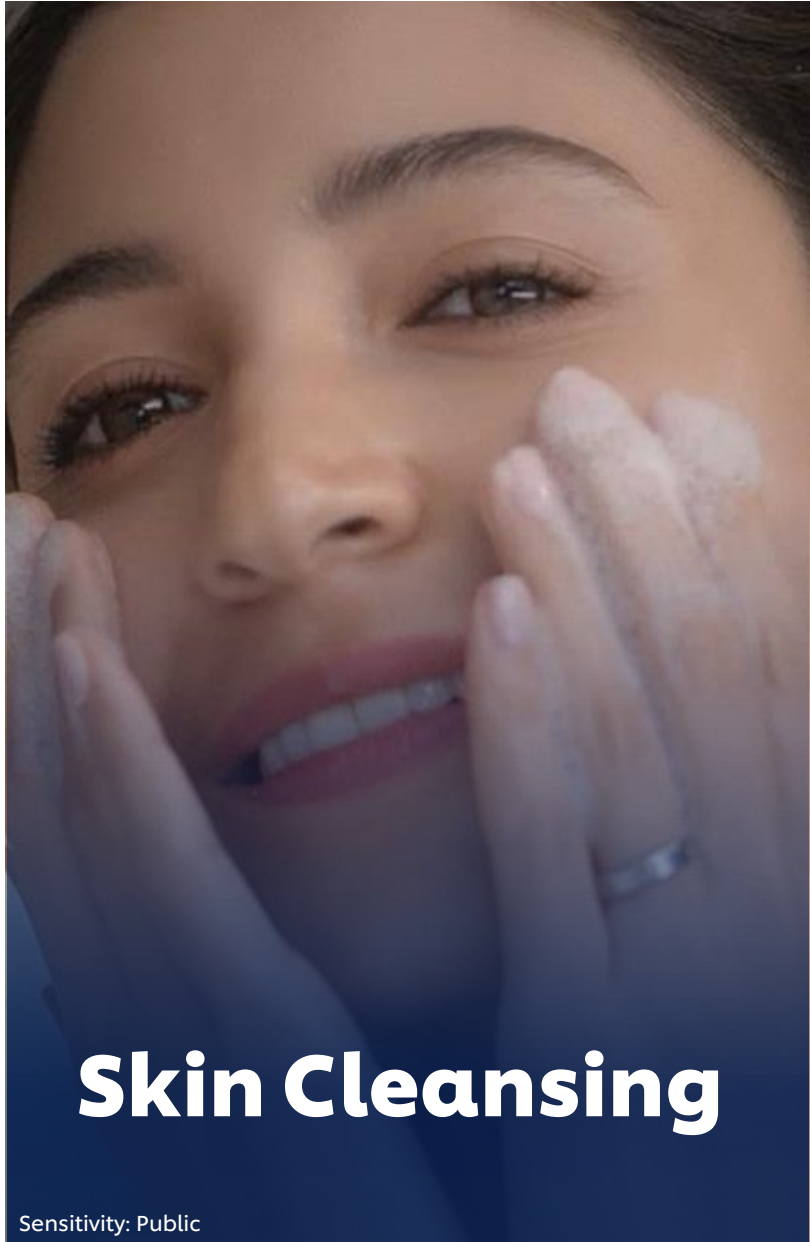
Source:
Business size as per FY'24 Turnover
Market leadership as per Nielsen Retail Market Value Share
Consumer usage as per Kantar Penetration, MAT Sep '24

Sensitivity: Public



Hindustan Unilever Limited

With presence across key and sizeable Personal Care categories



With Unparalleled Scale of our Unmissable Brands



Hindustan Unilever Limited

Lifebuoy
WORLD'S NO. 1
SELLING GERM PROTECTION SOAP

NEW

**Germ Fighting
Vitamin Formula
100% Stronger
germ protection**

*Based on National 50th Anniversary Best Germ Safety and Skin Care Soap & Liquid Hand Wash (both 8 variants)
Over 11 months available in 2024. National 50th Anniversary only. www.lifebuoy.com/global. Health claims are not for sale.

**18 HOURS
FRESH
BREATH**

**ZINC
FRESH TECHNOLOGY**

NEW

**UNVEIL
EVEN-TONED GLOW
THAT LASTS***

VITAMIN C VITAMIN E

LUX

*Back clinical study done by independent clinical research organization, 2024. With regular use.

Pears
No makeup
glow

Pears
Pure & Gentle
with natural Glycerin &
Natural Oils

Pears
Lush, Nourish,
Skin Rejuvenate

**98% PURE GLYCERIN
& NATURAL OILS**

4
**OF OUR
BRANDS
ARE**
₹1000
CRORE+

India's Income Distribution is changing

Growing incomes | Pyramid to Diamond

of households

219 MILLION

2005

293 MILLION

2018

386 MILLION

2030 PROJECTED

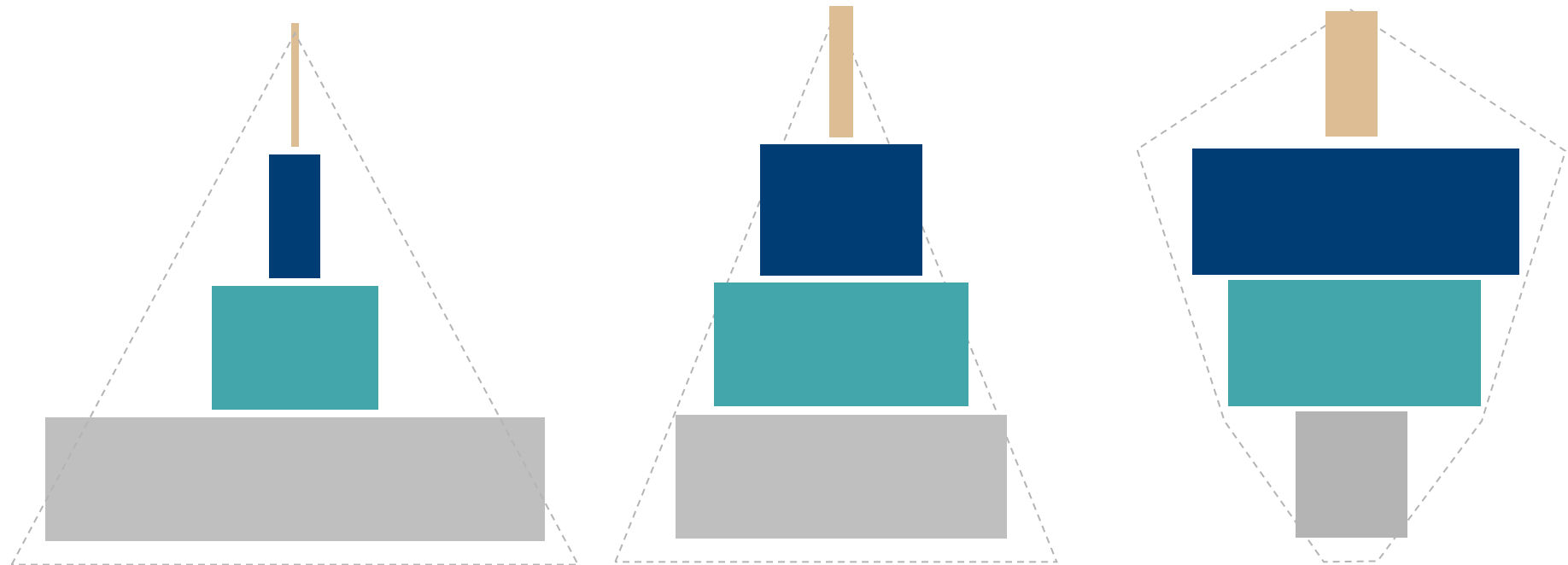
> \$ 40,000

\$ 8,500-40,000

\$ 4,000-8,500

< \$ 4,000

Annual income per household





This Affluence will bring higher spending power in PC

Per capita spends in Personal Care

PC Spends/HH/ Year

HUL Share of segment in body cleansing

Affluent +



2.2X

>120 API

Affluent



1.9X

1.2X

Aspirer



1.5X

<120 API

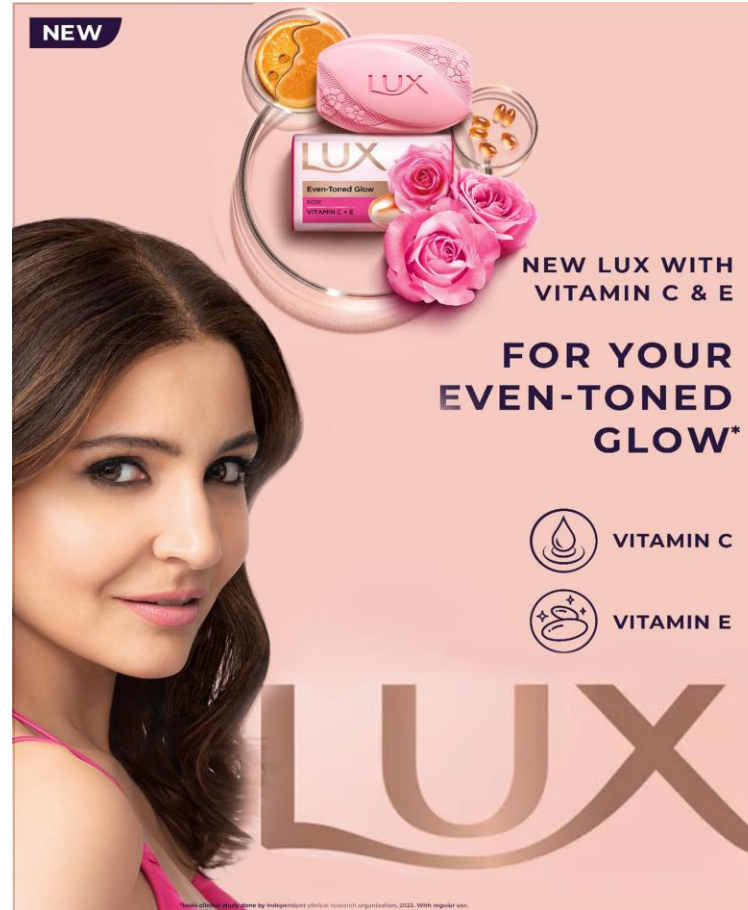
Striver



X

X

Leading Personal Care Disruption in India



01 Breakthrough Technology

02 Unmissable Brand Superiority

03 Market Making

1. We have a legacy of Pioneering Technology



Hindustan Unilever Limited



1A. Stratos Technology lead innovation unlock on Bars

Formulation Flex



**Brighter Soap
visuals**

Supply Chain Resilience



**Creamy
Lather**

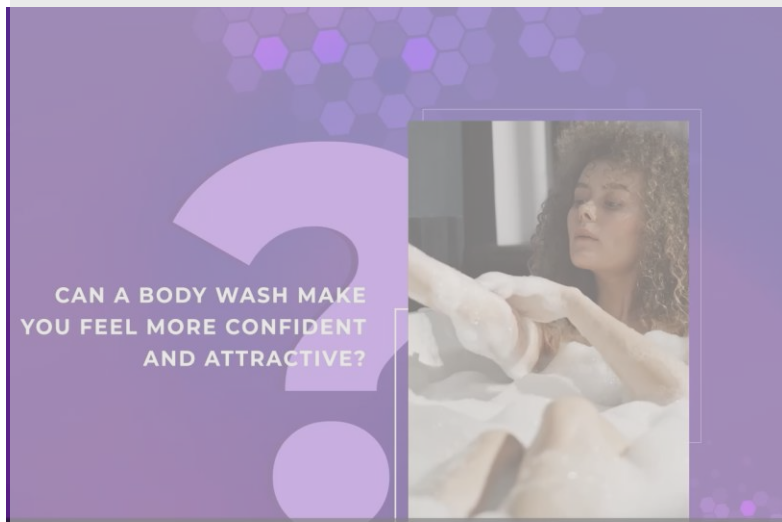
Demonstrable Superiority



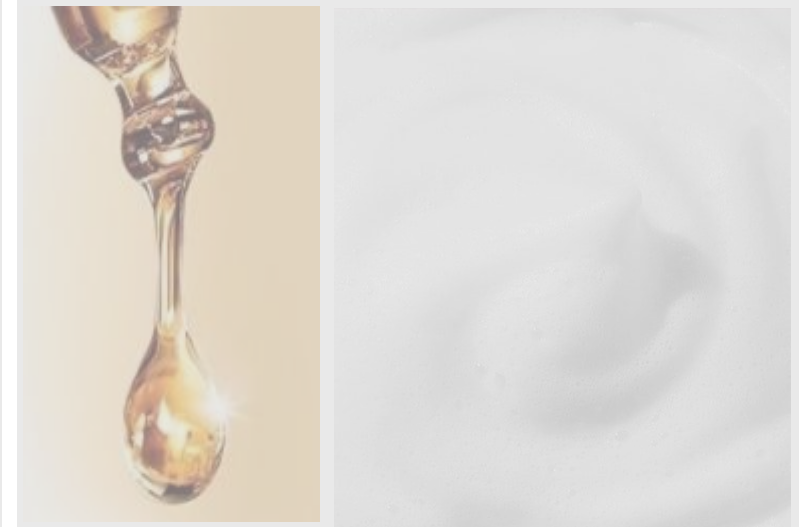
**Lower rate
of wear**

1B. Breakthrough Technology to meet Unique Consumer Needs

Mood Engineering



Advanced Shower



Potent Freshness





**CAN A BODY WASH MAKE
YOU FEEL MORE CONFIDENT
AND ATTRACTIVE?**



Lux Tech AV

2A. Unmissable Brand Superiority - Lux Beauty Masterbrand



Hindustan Unilever Limited

NEW

ENHANCES YOUR SKIN FOR AN
EVEN-TONED GLOW*

VITAMIN C VITAMIN E



LUX

*Based on clinical study done by independent clinical research organization, 2022 with regular use.

NEW

UNVEIL
VISIBLY CLEAR
GLOWING SKIN*

100% PURE SANDALWOOD OIL VITAMIN C



LUX

*Based on clinical study done by independent clinical research organization, 2024. With regular use.

EXPERIENCE
LONG LASTING
FRAGRANCE

UP TO 12 HRS*



LUX

*Based on clinical study done by independent clinical research organization, 2024. With regular use.

INDULGE.
EXFOLIATE.
GLOW.

WITH 100% NATURAL HIMALAYAN OIL



LUX
ESSENCE OF HIMALAYAS

2B. Unmissable Brand Superiority - Designed for Channel

Traditional Trade

Modern Trade

E-Commerce



2C. Unmissable Brand Superiority - WIMI Product solutions



Hindustan Unilever Limited

Product solutions
in our portfolio
across
preferences



Skin type

-Dry / Sensitive Skin



Habit and Tradition

Ingredient Preference -Neem/Sandal



External aggressors

Climate and Pollution



Economics

Affordability and Premium



closeup®

LUX



2D. Unmissable Brand Superiority - WIMI in communication

Rooted in culture



Festival Activation



Category X WIMI insight



Regional Celebrities



Pop culture





এক হাইজিন এক্সপার্টের সজনি কল্পনা



Lifebuoy AV



NEW

UNVEIL VISIBLY CLEAR GLOWING SKIN*

100% PURE SANDALWOOD OIL VITAMIN C

LUX

*Basis clinical study done by independent clinical research organization, 2024. With regular use.



Lux Soap AV



Moti AV

3. Market Making| Via Body Washes and Roll-ons

A. Bodywash : 5X Growth | 2x Profitability

B. Roll-Ons



Market Making using HUL capabilities

Wide media

Bodywash>>



Roll-On>>

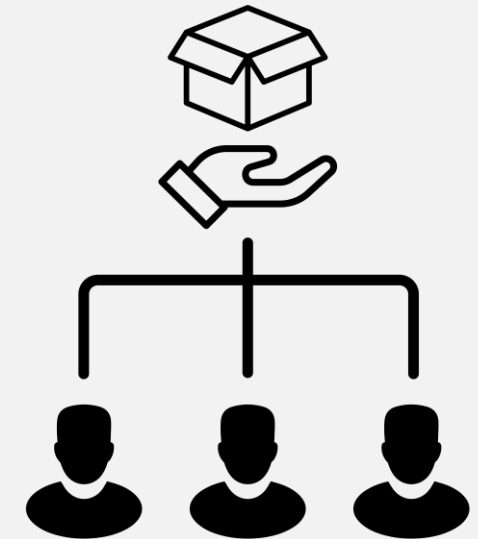


Sampling



- Residential Complexes
- Colleges
- In-store

Build Distribution





NEW

UP TO **12** HRS*

EXPERIENCE LONG LASTING FRAGRANCE

LUX

LUX
BODY WASH
MAGICAL ORCHID
BLACK ORCHID & JASMINE SCENT
12H LONG LASTING FRAGRANCE

*Basis technical study by independent external fragrance experts, 2021 & IPSOS consumer study, 2022.



Lux Suhana AV

Premium Portfolio also plays across variety of Benefit Spaces



Hindustan Unilever Limited

Fragrance

NEW

UP TO 12 HRS LONG LASTING FRAGRANCE

EXPERIENCE LONG LASTING FRAGRANCE

LUX

Clean Beauty

Pears
Body Wash

Pure & Gentle

0% soap, parabens

Dermatologist Recommended

MOISTURISED GLOWING SKIN

Moisture

Dove

sulphate free cleansers

deep moisture body wash

24hr moisturised skin

Instantly Soft Skin after every shower

Sensitive

Dove Advanced

sensitive care

WITH CERAMIDE-NUTRIENT CREAM

NO PARABENS, DYES, PHTHALATES | WITH 100% SKIN NATURAL NUTRIENTS

Indulgent Sensorials

INDULGE. EXFOLIATE. GLOW.

WITH 100% NATURAL HIMALAYAN OIL

LUX ESSENCE OF HIMALAYAS

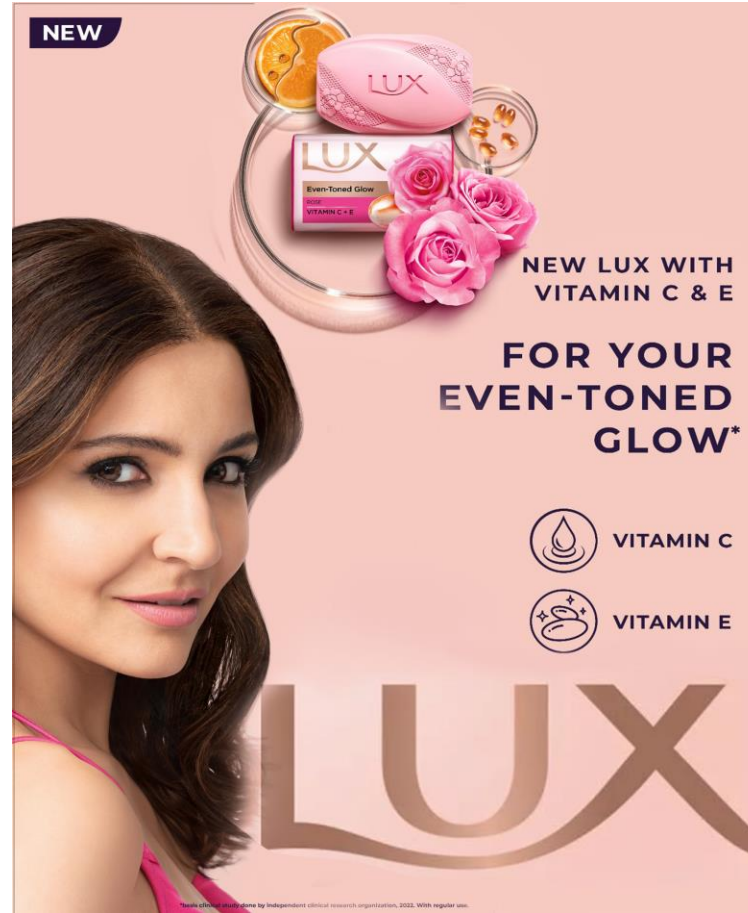
Advanced Skin Care benefits

Dove

SERUM SHOWER COLLECTION

Expert skincare ingredients in your shower

Leading Personal Care Disruption in India



01 Breakthrough Technology

02 Unmissable Brand Superiority

03 Market Making



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PERSONAL CARE...

THANK YOU

