

Deutsche Bank Global Consumer Conference 2021

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Hindustan Unilever Limited

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Hindustan Unilever Limited



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HUL: India's largest FMCG Company

India

€5 bn

Turnover

+ €3 bn

In last decade

25%

Operating margin

+1000bps

In last decade

9 out of 10

Households use one or more of our brands

5th Largest

Indian company by market capitalisation of

€ 66 bn

c. 90%

Of our business has category leadership



Hindustan Unilever Limited

Brands in

8m+

Stores



Largest M&A

in FMCG in India



Employer of choice

Across industries

+2200bps

Gender balance in last decade

136k

Shakti women micro entrepreneurs

Plastic neutral

By 2021

>1.3 tn litres

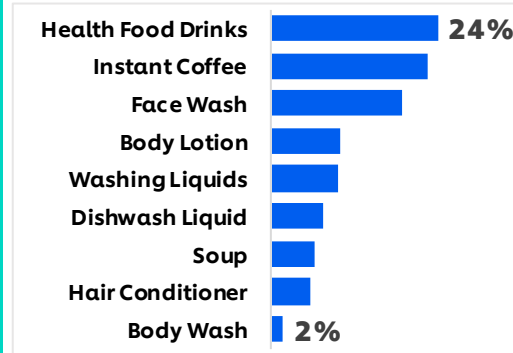
Water conservation potential created

India is reforming

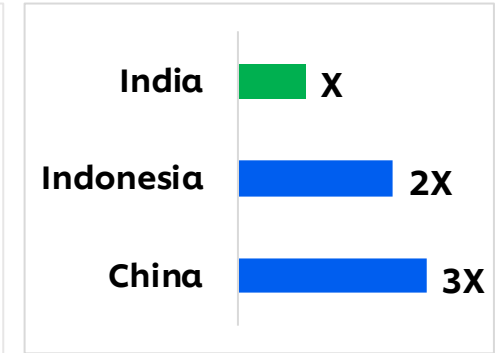


Ease of doing business rank improved
+79

FMCG has huge headroom to grow



Low category penetration



FMCG per capita consumption

Demographics dividend

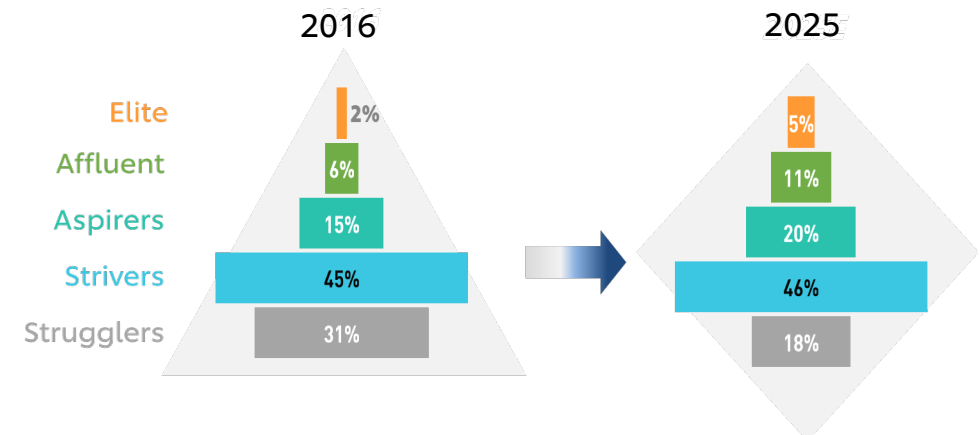
1.05 bn working class population

1/3rd are millennials

80% nuclear households by 2030



Income pyramid moving towards a diamond





Hair care

CAGR 11%



Relative Market Share
3X



Straddling price - benefit pyramid



Portfolio transformation





Fabric Wash

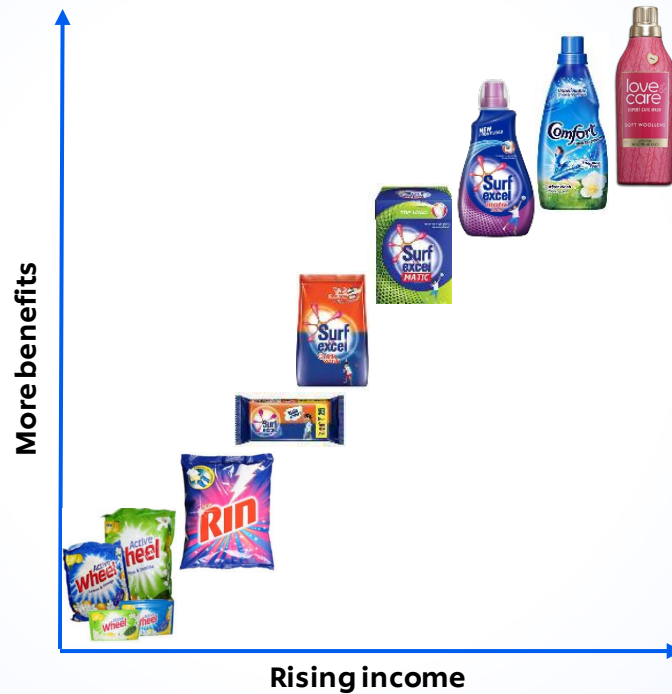


**Profitability
8X**

**Relative
Market Share
2X**



Upgrading with new benefits



Impactful Innovations





Tea



Secured market leadership in Tea



Winning in many Indias'



Recognising Heterogeneity

Punjab & Karnataka

Same brand designed for different preferences



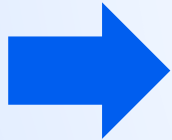
Market Development



Internet penetration



2015
302 m

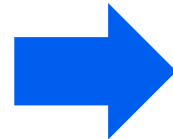


2021
761m

Cost of 1 GB data



2015
US\$ 4

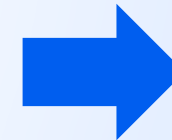


2021
US\$ 10c

Average monthly data consumption per user



2015
0.8 GB



2021
13 GB

Yesterday

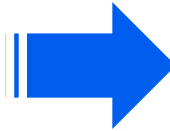


Source

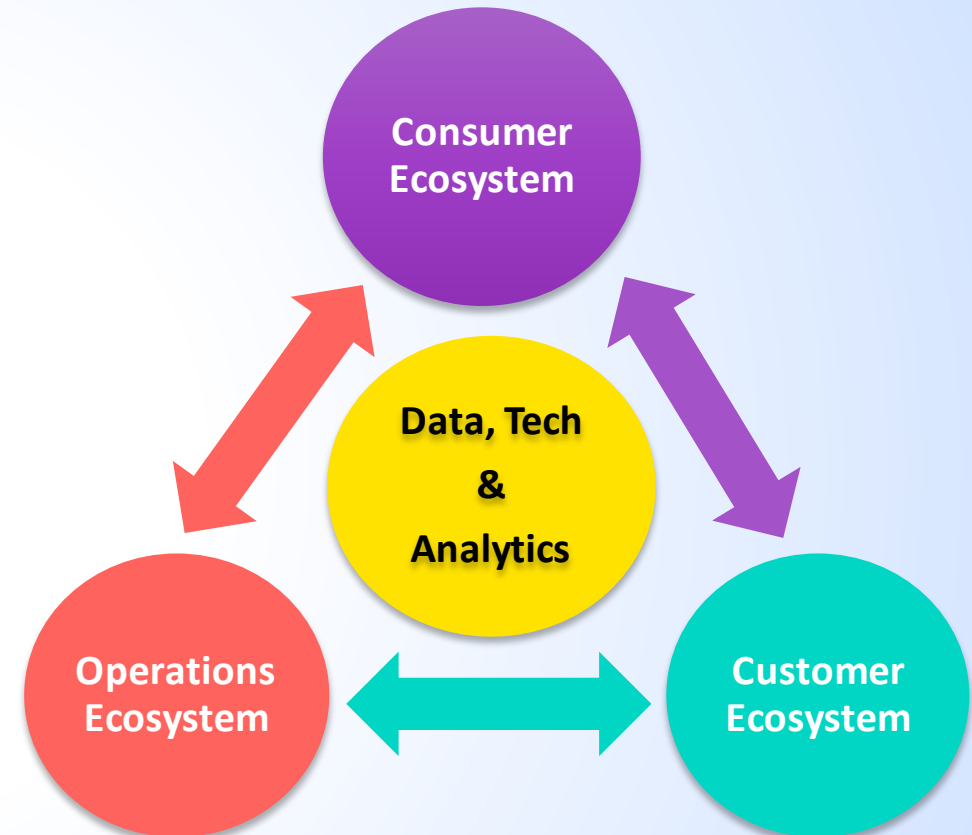
Manufacture

Distribute

Sales



Tomorrow



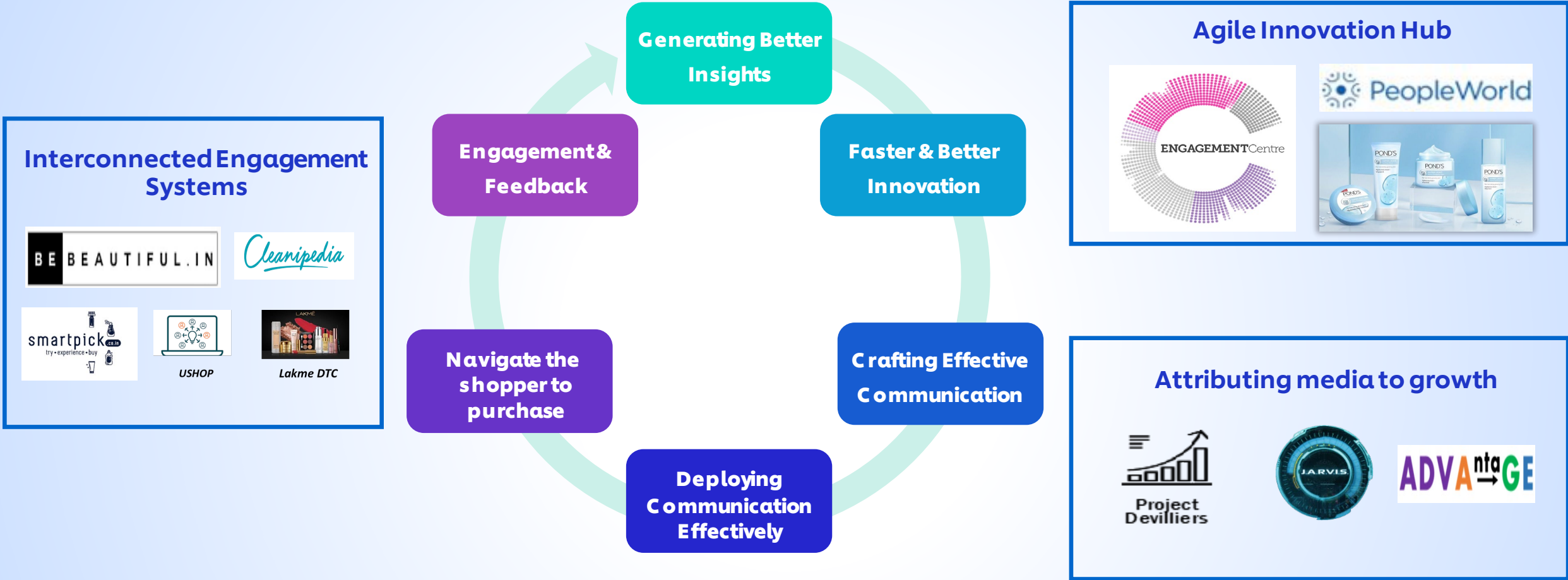
Consumer Ecosystem

Data, Tech & Analytics

Operations Ecosystem

Customer Ecosystem

Transforming from linear value chain to non linear and interconnected ecosystems



Consumer signal to launch in half the time



| | | | | | |
|-------------------|-------------------------------------|--|-----------------|---|--------------------|
| Capability | eComm, USHOP (DTC) & MyKirana (B2C) | Shikhar (eB2B ordering) | Digi Payment | Data & Analytics | Last mile Delivery |
| Impact | Ambition to double contribution | App based call & personalised recommendation | Retailer credit | Route optimisation, assortment recommendation | Next day delivery |

> 500k Kiranas (traditional grocers) connected; 2 Year plan folded in 6 months

Plan & Source

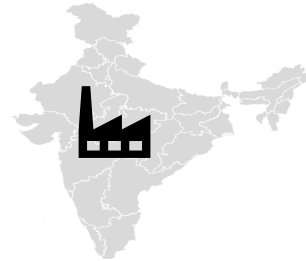


Artificial Intelligence led commodity and demand forecasting



Machine Learning powered intelligent planning for distributors

Make



Manufacturing & distribution network transformation



Digitally enabled agile manufacturing

Deliver & Service

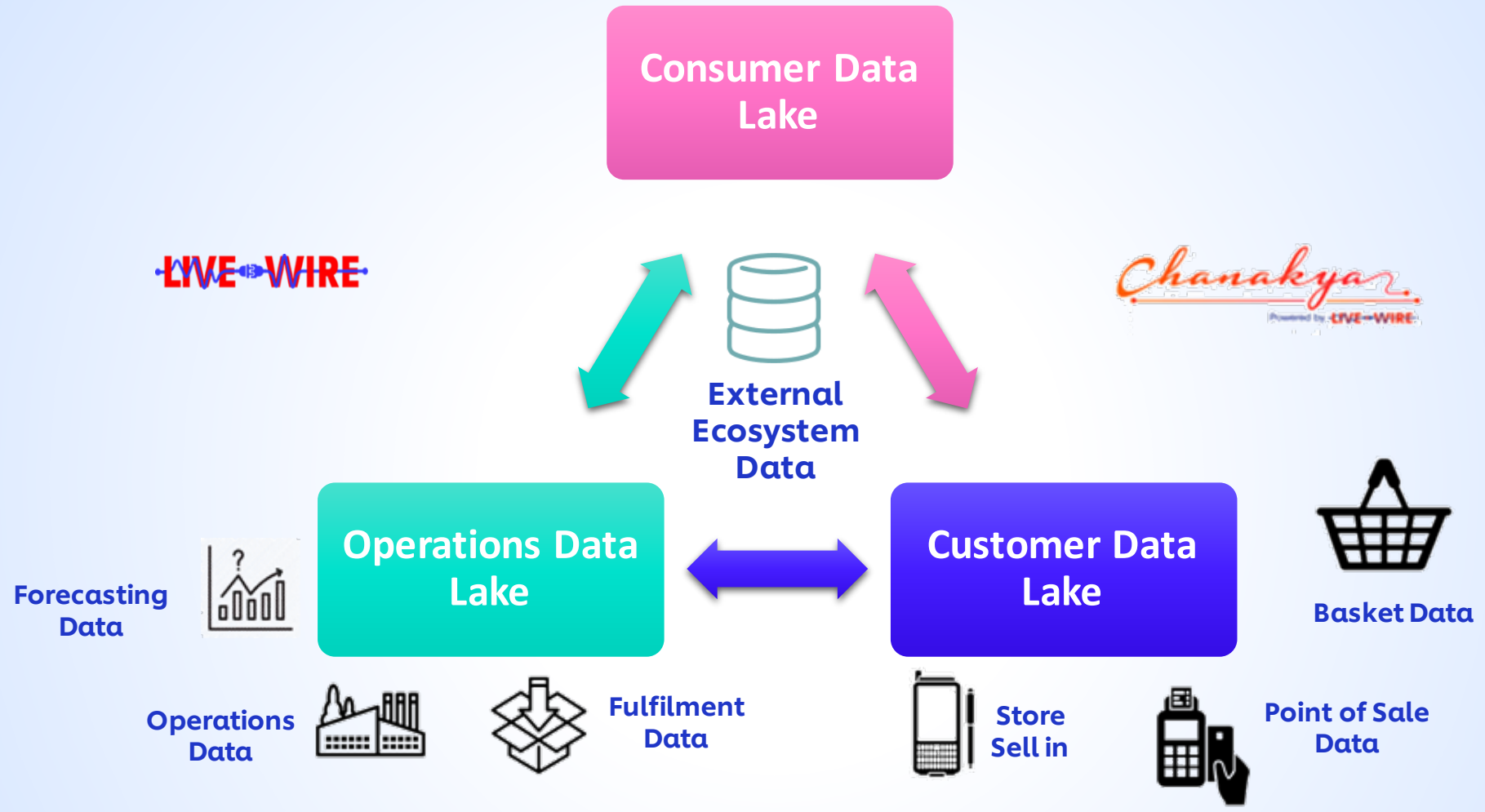


Automated storage & picking



Integrated routing & delivery

Moving towards a Hi-Tech and Intelligent Supply Chain



Augmenting decision making

Thank You