



## Hindustan Unilever Limited

Hindustan Unilever Limited  
Unilever House  
B D Sawant Marg  
Chakala, Andheri East  
Mumbai 400 099

Tel: +91 (22) 3983 0000  
Web: [www.hul.co.in](http://www.hul.co.in)  
CIN: L15140MH1933PLC002030

6th June, 2018

Stock Code BSE: 500696  
NSE: HINDUNILVR  
ISIN: INE030A01027

BSE Limited,  
Corporate Relationship Department,  
2nd Floor, New Trading Wing,  
Rotunda Building, P.J. Towers,  
Dalal Street,  
Mumbai – 400 001

National Stock Exchange of India Ltd  
Exchange Plaza, 5th Floor,  
Plot No. C/1, G Block,  
Bandra – Kurla Complex,  
Bandra (E),  
Mumbai – 400 051

Dear Sir,

### **Sub: Annual Investor Meet 2018**

This is further to our letter dated 2nd May, 2018, intimating that the Annual Investor Meet, we are attaching herewith the presentations shared with the Investors at the Annual Investor Meeting. The said presentation is also being uploaded on the Company website.

You are requested to take the above information on record.

Thanking You.

Yours faithfully,

**For Hindustan Unilever Limited**



  
**Dev Bajpai**

**Executive Director (Legal & Corporate Affairs)  
and Company Secretary  
DIN: 00050516 / FCS No. 3354**

# RE-IMAGINING HUL

ANNUAL INVESTOR MEET | 6 JUNE 2018

Sanjiv Mehta, CEO & MD



*Hindustan Unilever Limited*

# 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 realized. 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.

# PERFORMANCE IN THE RECENT PAST

## Net Sales

**~Rs. 13,500 Crores  
added^**



## EBITDA

**~Rs. 4,000 Crores  
added**



## Market Capitalisation

**~Rs. 250,000 Crores  
added**



*\*All nos compared with FY'11-12 which is reinstated to reflect key IND AS accounting impact*

*^Not adjusted for GST accounting impact & hence the net sales number looks deflated*

# A FEW EXAMPLES OF CONSISTENT HIGH PERFORMERS

## Laundry



## Hair Care



## Tea



# LAUNDRY



Turnover

1.8 X



Profitability

3.7 X



Consistent Growth in Topline & Bottom line

Drivers of growth

- Continuous focus on building purpose driven brands
- Driving premiumization & market development
- Consistent focus on profitable growth



# HAIR CARE



Turnover

1.9 X



Consistent delivery on all fronts

Market share

~700bps ↑



## Drivers of growth

- Strong play in the naturals space
- Undeterred focus on innovations, premiumization & building categories of the future
- Winning in channels of the future

# TEA



Turnover

1.8 X



No. 1 Tea Company in India

Profitability

2.0 X



## Drivers of growth

- Winning in Many Indias: customized cluster level propositions
- Market Development
- Strengthening the core
- Building brands with purpose



# BEING RECOGNISED



**Best Performing  
Unilever Business  
2014**

**Aon Hewitt  
Top Companies  
for Leaders 2014**

**# 3 Company globally  
for building leaders  
2014**



**Economic Times –  
Company of the year  
2015**



**#7 Globally and  
#1 in India  
2017**



**‘Dream Employer’ for 9 years in a row among top Indian universities**

# THE WORLD AROUND US IS EVOLVING



# IT'S AN AGE OF CHANGE AND DISRUPTION



Millennials / Gen Z



Globally connected  
but there is a search  
for authenticity



Changing family  
dynamics



There is a thrill of  
purpose



Uncertainties and  
Volatility are the new  
normal



Increased  
competition intensity



Digital disruptions  
reshaping business  
models



Evolving regulatory  
environment

# AND HENCE THERE IS A NEED FOR...

## Consumer Centricity



## Speed & Agility



## Digital Connectivity



## Being Glocal



# FMCG CONTINUES TO BE A BIG OPPORTUNITY IN INDIA



To tap this big opportunity, we need more money in the hands of more people i.e. Inclusive Growth

WINNING IN THE FUTURE  
NEEDS A DIFFERENT APPROACH







# RE-IMAGINING HUL FOR THE FUTURE



# RE-IMAGINING HUL

## Re-imagining our structure



## Re-imagining our portfolio



## Re-imagining magic in marketing



## Re-imagining our trade channels



## Re-imagining the value chain



## Re-imagining fuel for growth



## Re-imagining culture of the organisation



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# INDIA IS A HETEROGENOUS COUNTRY

## Diverse demographics



Multiple languages  
8 Major religions

## Varied affluence levels



LSM 7+ = 9% nationally  
(Range of 5-48%)

## Different media habits



Mobile internet penetration:  
Rural- 18%\*; Urban- 59%\*

## Differential category adoption



Market share in adjacent  
states also not the same



# WINNING IN MANY INDIAS (WiMI)



## WiMI in action

Distinctive strategy at a cluster level

Customized product propositions & media deployment for every cluster

Empowered Cluster Heads enabling faster decision making closest to the point of action across the country

# CCBTs: 15 MINI-BOARDS IN ACTION



**Building a stronger sense of empowerment & ownership**

**Multi functional  
representations in CCBTs**



**Merger of Brand Development  
& Brand Building**



**Responsible for delivering in-year P&L**



# LIBERATING THE MANAGEMENT COMMITTEE TO FOCUS ON LONGER TERM GOALS

**Build new  
business models**



**Greater focus on  
talent & capabilities**



**Explore Inorganic  
growth opportunities**



**Coach & Mentor  
CCBTs**



# RE-IMAGINING HUL

Re-imagining our  
structure



Re-imagining our  
portfolio



Re-imagining magic  
in marketing



Re-imagining our  
trade channels



Re-imagining the  
value chain



Re-imagining fuel for  
growth



Re-imagining culture  
of the organisation



# STRENGTHENING THE CORE



Focus on driving  
penetration &  
weighted  
distribution



Constantly  
innovating and  
renovating the  
core



Focused SKUs at  
cluster level to  
address demands  
of all Indias



Making the core  
more aspirational

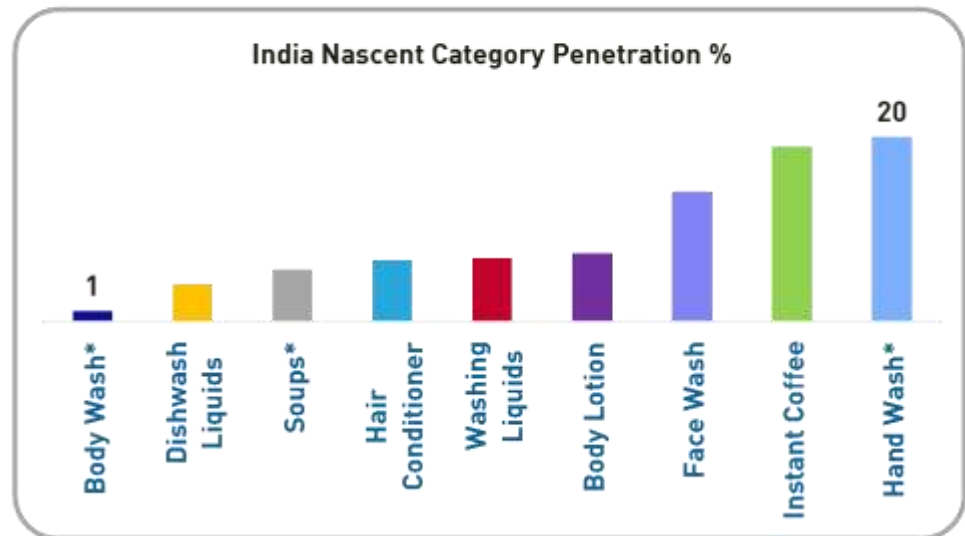


Offering multiple  
value additions  
across the core  
portfolio



# CREATING CATEGORIES OF THE FUTURE

Opportunities to premiumize and up trade; huge headroom to grow



# MARKET DEVELOPMENT & PREMIUMIZATION

Powered by education demos and sampling

## Business Results



Growing at ~2X HUL Average

## Science of Sampling



2014

Consumer  
contacts



2017



# BUILDING NATURALS



Naturals portfolio growing ~2.5X of overall HUL average



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# BUILDING BRANDS WITH PURPOSE



# BUILDING ICONIC ENGAGEMENT PLATFORMS

Lux Golden Rose Awards



Lakmé Fashion Week



FAL Foundation



Lifebuoy help a child reach 5



Surf Excel Haar Ko Harao



Rin Career Academy



Red Label Taste and Togetherness



Kissanpur





# CONSISTENTLY EVOLVING THESE PLATFORMS



2005



Pride

2009



Empathy & Overt  
expression of love

2012



Loyalty & Forgiveness

2017



Learning from  
Failure

2005



*Pyar ka pyala*

2008



*Chuskiyan  
zindagi ki*

2010



*Health & Taste, Swasth  
rahein, mast rahein*

2014



*Taste &  
Togetherness*

2017



*Taste &  
Togetherness*

# BUILDING DIFFERENTIATED CONTENT

## Television



## Website



## Social Media



## Digital Video



## Ecommerce



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Re-imagining culture  
of the organisation





# GENERAL TRADE WILL CONTINUE TO REMAIN BIG

More throughput from more stores

All channels will remain relevant

Wholesale



Aids ↑ Width of distribution

Retail



Accessibility at arm's reach of desire

Driving effective coverage & assortment

COVERAGE



ASSORTMENT



In a country of ~6 LAKH villages & 10 MN outlets, GT even after 10 years, will remain an important channel

# BUILDING CHANNELS OF THE FUTURE

## Modern Trade



**Driving visibility across Modern Trade**

## ECommerce



**Ecommerce business now ~1.5% of HUL**

**Our Growth & Profitability in ECommerce > Modern Trade > Traditional Trade**

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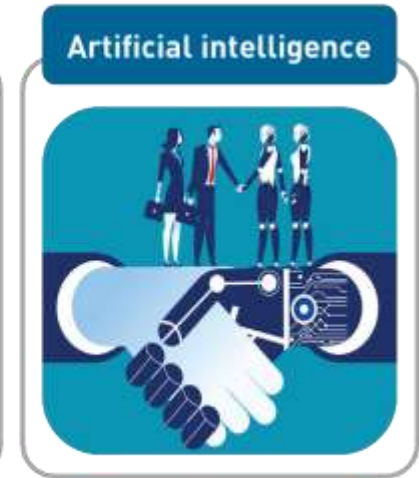
Re-imagining fuel for  
growth



Re-imagining culture  
of the organisation



# TECHNOLOGY AVAILABLE TODAY, OPENS UP A LOT OF OPPORTUNITIES



# OUR DATA STRATEGY





# WE CHOSE TO DISRUPT THAN BE DISRUPTED

By looking at the full value chain end-to-end

Insights



R&D



Manufacturing



Distribution



Communication



Consumer  
Journey



# RE-IMAGINING HUL: OUR VISION

*“Re-imagine HUL of the future by choreographing a holistic approach **across the value chain** to completely transform the way we do business in a connected world”*



# RE-IMAGINING SUPPLY CHAIN

## Plan



- 1 Day Planning Cycle (real-time)
- Integrated S&OP
- Segmentation 2.0

## Source



- Integrated e-tendering
- Realtime Forecast
- Smart Inventory modelling

## Make



- Digital Factory
- Smart Robotics
- Network redesign

## Deliver



- New Logistic models
- Efficient Fulfilment Centres



Robotization AV

# RE-IMAGINING MARKETING

Granular data analysis  
and tracking



Advanced Analytics &  
Decision Support System



Social Listening: Always  
on Conversation



Precision Marketing:  
Consumer Journey



Precision Targeting  
and Deployment



MAXIMA

# RE-IMAGINING CUSTOMER DEVELOPMENT



**Demand Capture**



**Demand Fulfilment**



**Demand Generation**

**Providing superior customer service through vertical task specialization across the three pillars interlinked through modular IT capabilities**

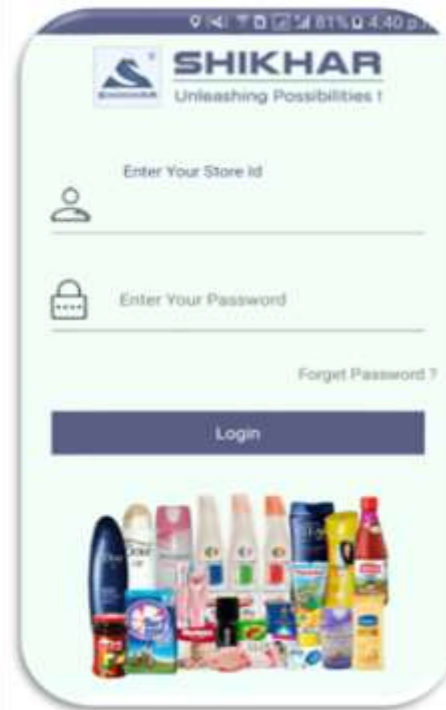


# DEMAND CAPTURE

## Demand Capture



- Enhance salesman productivity with chatbots
- Advanced Analytics/AI for assortment led growth
- Scale up Shikhar App



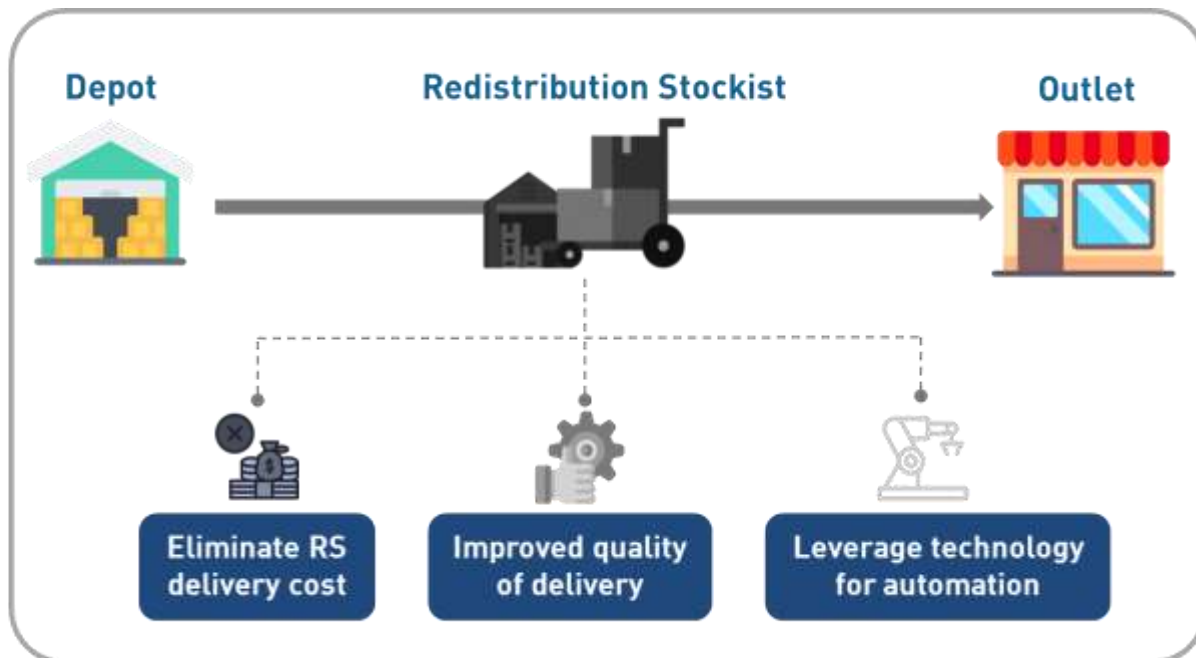
Shikhar App AV

# DEMAND FULFIL

## Demand Fulfil



- **Project Shogun: Deliver with speed to trade and ensure efficient fulfilment**
- **Scale up Impact App**



# DEMAND GENERATE

## Demand Generate



- Scaling up B2C (HumaraShop)
- Leverage technology to improve shelf presence

Your Local Khana, Now Online | 1000 418 1019 | HumaraShop | SIGN IN / SIGN UP

Humara Shop | CATEGORIES | Search products & brands | OFFER ZONE | BASKET

**LAKMÉ Beauty Store**  
SHOP NOW  
UPTO **15% OFF\***

**Tea Coffee**  
UPTO **10% OFF\*** SHOP NOW

**kissan JAM at ₹99/-\***  
SHOP NOW  
only

\*Offer valid 100 stocks limit. T & C apply

# RE-IMAGINING HUL

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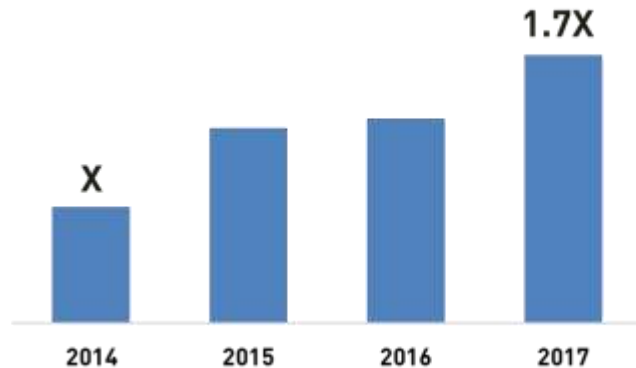


Re-imagining culture  
of the organisation



# OUR HISTORY OF SAVINGS

Savings as a % of Turnover



Powered by



Cutting complexity  
& driving agility



Organisation wide  
initiative



Building an  
owners mindset





# GENERATING FUEL FOR GROWTH BY CONSTANT REINVENTION

## A Business Model that Works



## Max the Mix

Portfolio

Channel,  
Geography

Margin  
accretive  
innovation

Pricing

## End-to-end cost focus

Materials

Non Material  
Supply Chain  
Costs

Return on  
Marketing  
Investments

Overheads

## Organisation wide ownership mindset

  
PARTNER TO WIN

  
ZERO  
BASED  
BUDGETING

  
NET REVENUE  
MANAGEMENT

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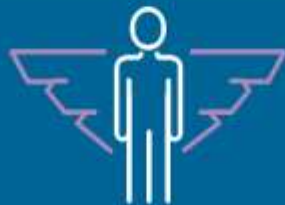


Re-imagining culture  
of the organisation



# CHANGING STRUCTURES AND PROCESSES IS NOT ENOUGH

**Change in mindset** enables us to continuously adapt



**EMPOWERMENT**



**COLLABORATION**



**EXPERIMENTATION**

**Change in mindset is key to landing transformation**

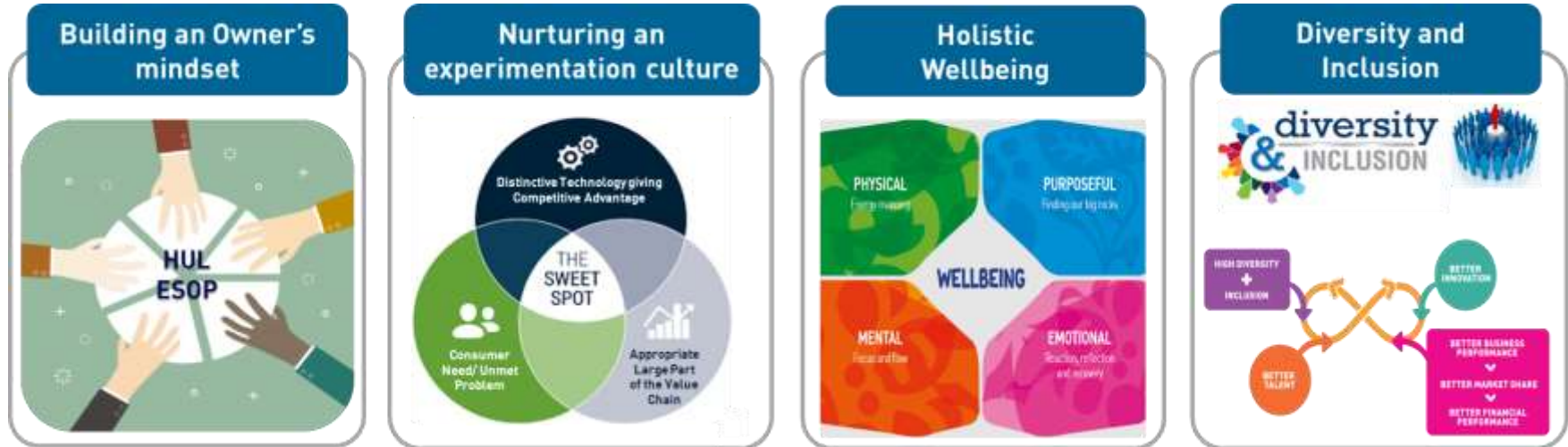
# NEW STANDARDS OF LEADERSHIP



Our Standards of Leadership sit alongside the enduring values of Unilever

**Respect   Responsibility   Integrity   Pioneering**

# BRINGING AN ORGANISATION WIDE CHANGE





**WHILE WE RE-IMAGINE HUL, WHAT WE  
WILL NOT CHANGE IS  
OUR PURPOSE & VALUES**

# LEGACY OF DOING WELL BY DOING GOOD

## Founder's Vision in the 19th century



## Our Purpose today



*"I believe that nothing can be greater than a business, however small it may be, that is governed by conscience; and that nothing can be meaner or more petty than a business, however large, governed without honesty and without brotherhood."*

*-William Hesketh Lever*

# LED BY VALUES

## Values



**INTEGRITY**  
**RESPECT**  
**RESPONSIBILITY**  
**PIONEERING**

## Living the values

**THANK YOU, GST.**



**MUCH MORE VALUE ON YOUR FAVOURITE BRANDS.**

  
Hindustan Unilever Limited  
Serving India for over 88 years.

GST benefits on the above packs and across a wide range of products are being made available. Stock manufactured with reduced 18% (inclusive of all taxes/GST) or with higher grammage/volume have started reaching markets.

# UNILEVER SUSTAINABLE LIVING PLAN

## Improving Health & Wellbeing

>67 million people reached - **Lifebuoy Handwashing Programme**

83 billion litres of safe drinking water provided by **Pureit**

~1.1 million people impacted through **Domex Toilet Academy**



## Reducing environmental footprint

100% TOMATOES



&



52% TEA

are sourced from sustainable sources



54% reduction in waste generated during manufacturing in 2017\*

## Enhancing Livelihoods



Project **Shakti** network grew to **80,000** entrepreneurs

1.7 million people benefitted from **Prabhat's** USLP linked programmes



Over **420,000** people benefitted from **Rin Career Ready Academy**

200,000 women enrolled for **Fair & Lovely Foundation's** online education programme





# POSITIVE IMPACT ON THE PLANET

## Thought leadership on water conservation and plastics



Hindustan Unilever Limited  
Hindustan Unilever Foundation

**450 billion litres\*** of water potential created



- Ensure all our plastics packaging is designed to be reusable, recyclable or compostable.
- 25% of all the plastic we use will come from recycled sources by 2025



# IN SUMMARY



The external context is fast evolving and FMCG in India continues to be an immense opportunity



The new structure (WIMI, CCBTs) has made HUL more agile and resilient



We are leveraging technology to re-imagine our current ways of working across the value chain



We are building capabilities and re-imagining our culture to be future ready

**Our purpose and values remain unchanged**



**HUL IS RE-INVENTING ITSELF TO BE FUTURE READY !**

# THANK YOU

For More Information

## VISIT OUR WEBSITE

<http://www.hul.co.in/investorrelations/>

### Investor Relations

#### HUL Annual Investor Meet 2018

HUL's Annual Investor Meet 2018 will be held on 6th June 2018, Wednesday, at the HUL Head Office in Mumbai.

> [View more](#)

#### RE-IMAGINING HUL

ANNUAL INVESTOR MEET | 6 JUNE 2018

Sanjiv Mehta, CEO & MD



# CATEGORY UPDATES

ANNUAL INVESTOR MEET | 6 JUNE 2018



*Hindustan Unilever Limited*

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# FOODS & REFRESHMENT

SUDHIR SITAPATI

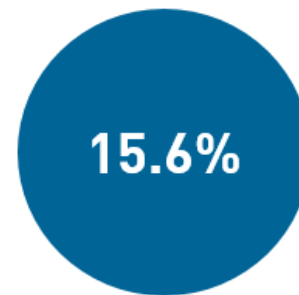
# FY 2017-18 PERFORMANCE HIGHLIGHTS



**Leading position in  
6 F&R categories**



**Double Digit  
TO growth**



**Segmental Operating  
margin FY'18**

# TEA: MARKET LEADERSHIP GAINED



Turnover



1.8 X

Profitability



2.0 X

No. 1 Tea Company in India

# OUR STRATEGY

**Drive premiumization  
& upgradation**



**Invest in Market  
Development**



**Win in channels  
of the future**



**Winning in Many  
Indias (WiMI)**



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**Drive premiumization  
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# FOODS: DRIVING PREMIUMIZATION THROUGH VARIANTS



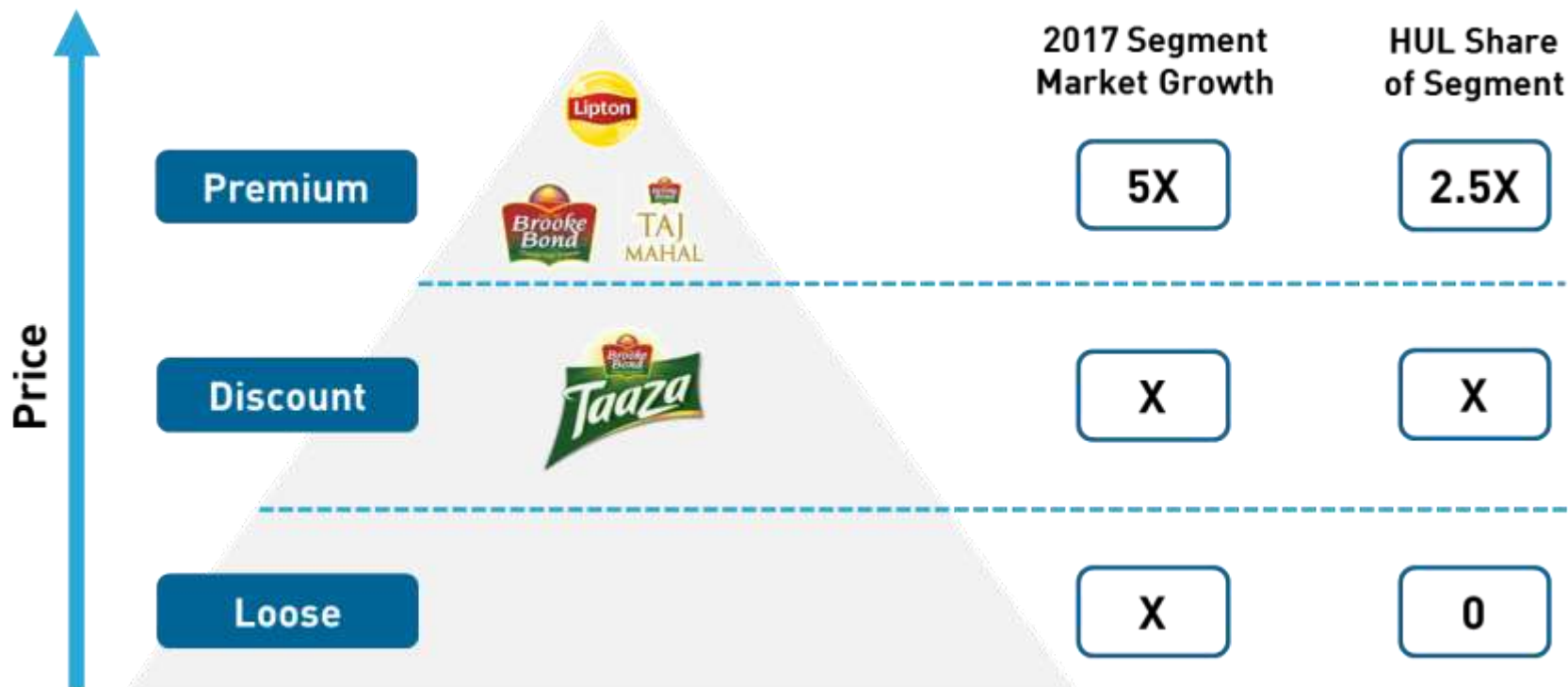
Accretive to foods portfolio  
by **580 bps**

**...AND PLOUGHING BACK INTO CORE**



**24%** volume growth  
on core pack

# TEA



# OUR STRATEGY

Drive premiumization  
& upgradation



Invest in Market  
Development



Win in channels  
of the future



Winning in Many  
Indias (WiMI)



# FOODS: TAPPING THE SNACKING OPPORTUNITY



## Attractive Market



**MEDIA**



**VISIBILITY AT POS**



**SAMPLING**



**Knorr Noodles AV**



# FOODS: CATERING TO THE NATURALS SEGMENT

## Inspired by Ancient Wisdom



Inspired by recipes and ingredients from ancient texts

## Making Traditional Ingredients Contemporary



Millets, cow's ghee, spices in a wholesome breakfast mix, with no added preservatives

## Building capabilities for pilot launches



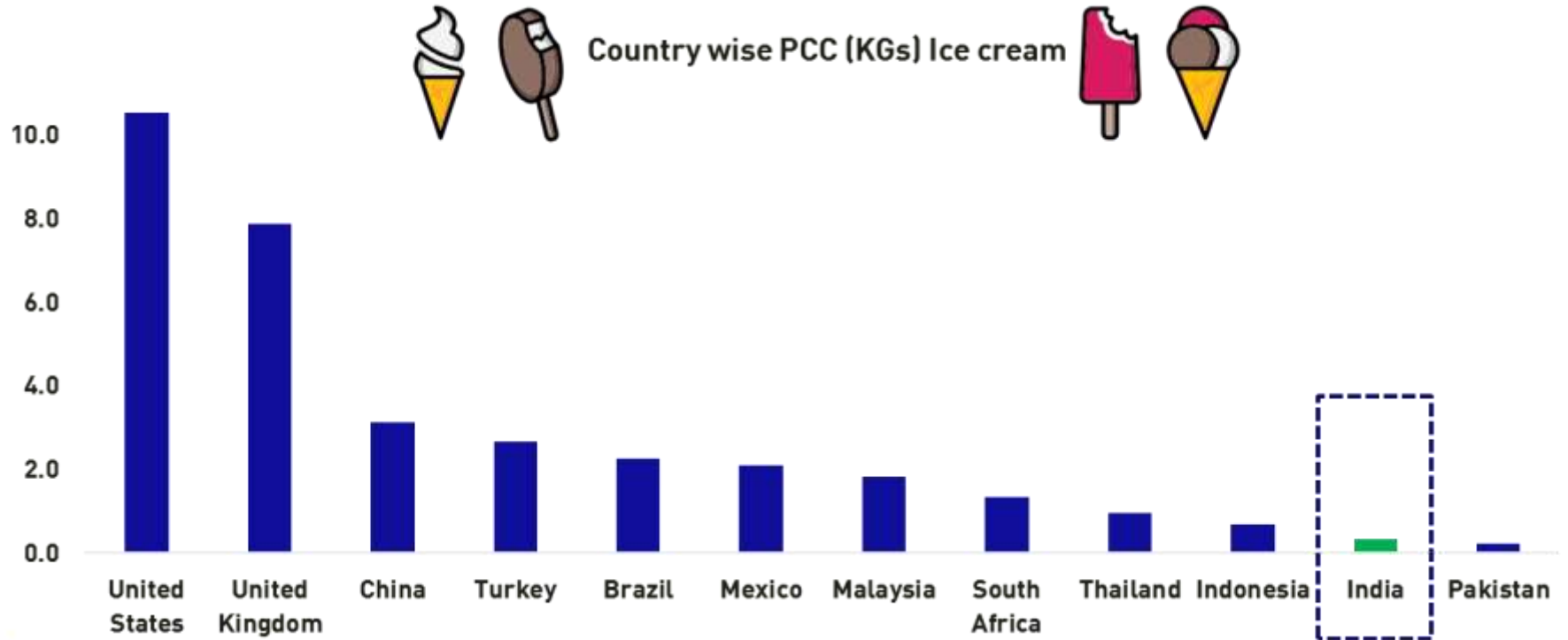
Road test the mix in Chennai before scale up to rest of India



Lever ayush Foods AV



# ICE CREAM CONSUMPTION: INDIA VS. THE WORLD



# DEVELOPING NEW SEGMENTS IN ICE CREAMS



Cornetto Oreo & Kwaliti Wall's Sandwich AV

# OUR STRATEGY

Drive premiumization  
& upgradation



Invest in Market  
Development



Win in channels  
of the future



Winning in Many  
Indias (WiMI)



# KWALITY WALL'S PRESENCE: FROM 40 CITIES TO 400 PLUS CITIES

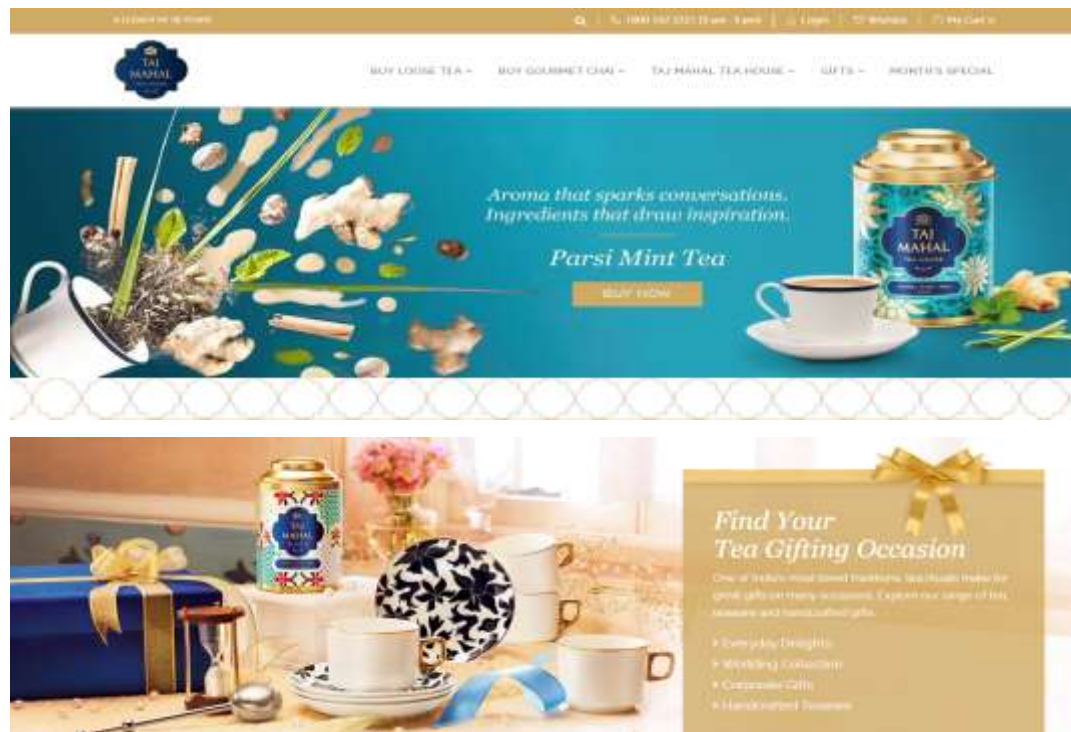
YEAR 2014



YEAR 2018



# TAJ MAHAL ECOMMERCE SITE





# FOODS: TAPPING THE DIGITAL LANDSCAPE WITH SEEK-OUT CONTENT



IFN

=



+



Kissan AV

# OUR STRATEGY

Drive premiumization  
& upgradation



Invest in Market  
Development



Win in channels  
of the future



Winning in Many  
Indias (WiMI)



# WiMI DEPLOYED IN TEA & COFFEE



WiMI: Bru & Red Label AV



**THANK YOU!**



# HOME CARE

PRIYA NAIR



# FY 2017-18 PERFORMANCE HIGHLIGHTS



**In all Key Sub  
Categories**



**Double Digit  
TO growth\***



**Segmental Operating  
Margin FY'18**

# OUR STRATEGY

**Drive premiumization  
& upgradation**



**Invest in Market  
Development**



**Win in channels  
of the future**



**Grow Profitably**



# OUR STRATEGY

**Drive premiumization  
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**Invest in Market  
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**Win in channels  
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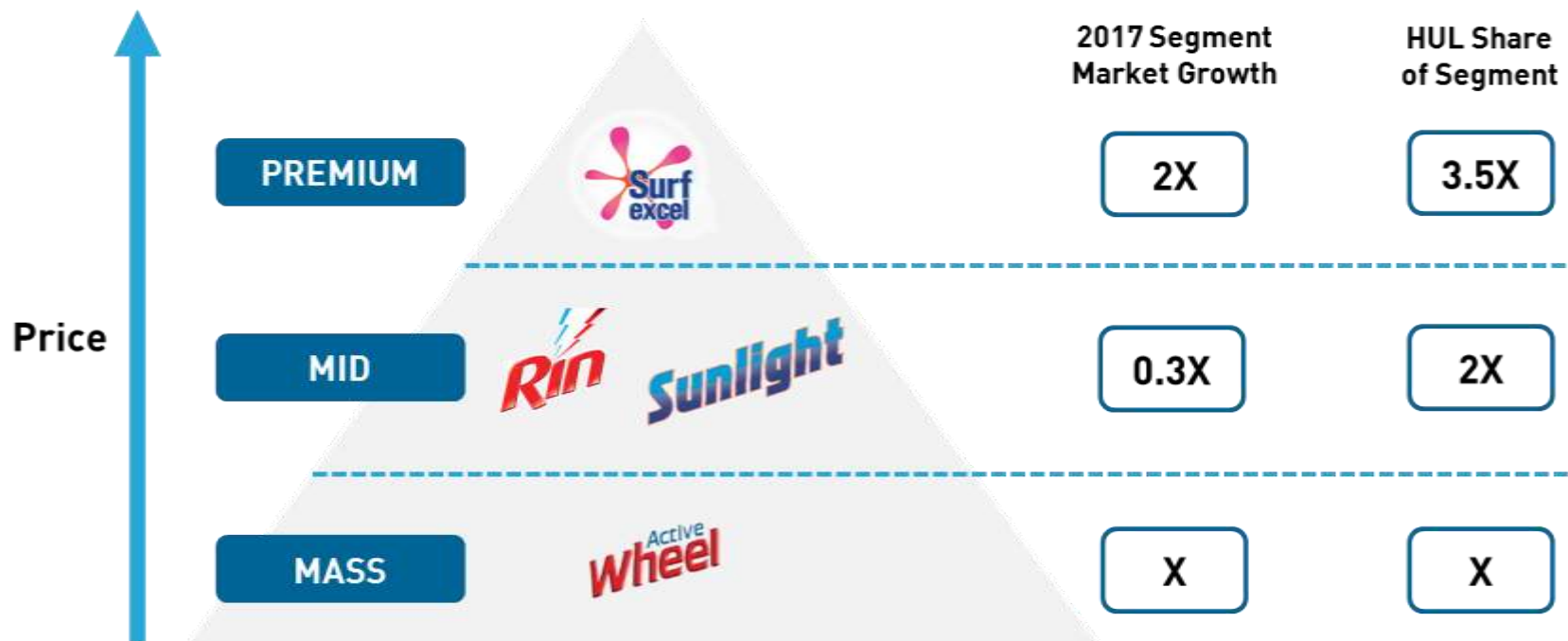


**Grow Profitably**



# PREMIUMIZATION IN LAUNDRY

## ENABLING COMPETITIVE AND PROFITABLE GROWTH



# BUILDING ASPIRATIONAL BRANDS AIDS PREMIUMIZATION



## #HAARKOHARAO



Bachche haarna kahan se seekhte hain?

THINK



TALK



ACT



Surf Excel AV



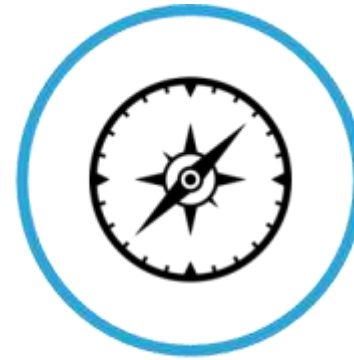
# BUT IMPORTANT TO REMAIN COMPETITIVE IN MASS EVEN AS WE UPGRADE THE MARKET



**Value, not price**



**Sharp choices**



**Building a  
purposeful brand**

# BUILDING A PURPOSEFUL WHEEL



Active Wheel AV

# OUR STRATEGY

Drive premiumization  
& upgradation



Invest in Market  
Development



Win in channels  
of the future



Grow Profitably



# CREATING SEGMENTS OF THE FUTURE

## LAUNDRY



**MATIC  
POWDERS**



**SURF EXCEL MATIC  
LIQUID DETERGENT**



**RIN MATIC  
LIQUID DETERGENT**



**FABRIC  
CONDITIONER**

**GROWTH AT 3X OF REST OF LAUNDRY**

# WHILE EDUCATING CONSUMERS TO BUILD NEW HABITS

## LAUNDRY



Creating ritual to drive  
pre-treatment for stain  
removal in machines



Demystifying fabcon:  
Small step, Big Shine



Comfort AV



# SUCCESSFULLY DEPLOYING WiMI LAUNDRY

## MAJORITY MASS



Upgradation through mid and premium bars and powders



## MAJORITY MID



Upgradation through top end formats – Matic liquid

# DEPENDING ON CONSUMER BEHAVIOUR

## LAUNDRY

### Mental Reach



Go Deep: Mental reach  
through outdoor, static

### Trial Generation



Forced Trials

### Physical Reach



WS + Shakti to  
boost Rural RTM



TV, Digital to  
maximise Reach



Education-led  
Sampling



Promoter-led  
demos

# DRIVING LIQUIDS WHILE STRENGTHENING THE CORE

## DISHWASH

### Added benefits in Bar



**Vim Anti-Smell with Pudina**  
– removes malodour

### Upgradation to Liquids



**Vim Liquid with a benefit of**  
**No-Residue**



Vim Liquids AV

# OFFER A DIFFERENTIATED BENEFIT

## TOILET CLEANERS

### Portfolio

Rim Block



Liquid



Powder



### Proposition

Removes Germs that cause Malodour

Clean and not  
smelly



Changing the  
benefit ladder



# BUILDING THE PURIFIERS BUSINESS

## Building the brand in Salt Removal (RO)



Removes not just germs, but  
also harmful chemicals in water  
due to pollution

## Differentiated Innovations



Pure-it with Oxy-Blast  
technology

## Driving Air Purifiers amid increasing consumer need



Pureit AV



# OUR STRATEGY

**Drive premiumization  
& upgradation**



**Invest in Market  
Development**



**Win in channels  
of the future**



**Grow Profitably**



# CHANNELS OF THE FUTURE

## HC in ECommerce

1.4X

Homecare shares over-indexed in ECommerce vs other channels

## Seed for Future



Fast Track Innovations through ECommerce

## Create Differentially



Keep consumer journey in ECommerce in mind while designing



  
India's largest online supermarket









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of the future



Grow Profitably



# WITH A STRONG MARGIN IMPROVEMENT PLAN



**Symphony Savings  
Program**



**Having a  
positive Mix**



**ZERO  
BASED  
BUDGETING**

**Zero Based  
Budgeting**



**THANK YOU!**





# PERSONAL CARE

SANDEEP KOHLI

# FY 2017-18 PERFORMANCE HIGHLIGHTS



**1000 crore +  
brands**



**Double Digit  
TO growth**



**Segmental Operating  
margin FY'18**

# PORTFOLIO TO WIN ACROSS CHANNELS & SEGMENTS

## Core Range



## Premium Range



## Market Development Range



# HAIR CARE ACROSS SEGMENTS

## Core Range



## Premium Range



## Conditioners & Styling range



# OUR STRATEGY

**Drive premiumization  
& upgradation**



**Invest in Market  
Development**



**Win in channels  
of the future**



**Build Naturals**



**Make core  
aspirational**





# OUR STRATEGY

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Make core  
aspirational



# ACCELERATE PREMIUMIZATION

## New benefit spaces



## Leading trends



# OUR STRATEGY

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of the future



Build Naturals



Make core  
aspirational



# INVEST IN MARKET DEVELOPMENT

## Building the Anti-perspirant market



## Driving awareness of body lotion



Vaseline AV

# MARKET DEVELOPMENT AT SCALE

## Access Packs



## Winning in Many Indias (WiMI)



Cluster based jobs & marketing campaigns



## Sampling



Sampling in 2017 = 1.5X 2016



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aspirational



# WINNING IN ECOMMERCE & DIGITAL

## Ecommerce ready content



## Exclusive packs and ranges



## Win with Winners: JBPs with all Leading Players

NYKAA



# CREATING BEST IN CLASS ACTIVATIONS & CONTENT ONLINE

## Contextual targeting



Leveraging  
Search



Leveraging  
Seasonality



Penetration through  
Brand Intelligence



## Content to drive conversion



To lightweight and soft natural looking volume to your lashes.



Use to create and sustain a masterpiece that keeps looking soft.



Smart for perfect skin to give lashes with its moist and fresh.



Remove the better product before application.



After the styling, apply mascara to your upper eyelid.



Apply mascara to your lower lashes to define and lift your eyes.

# LEADING IN A DIGITAL WORLD WITH MEASURABLE METRICS

**Especially curated creatives for Social media to break the clutter**



**Content strategy to influence consumers online**

**BE BEAUTIFUL.IN**



*"Be the Wikipedia of Personal Care in India by answering all search queries on personal care through our brands"*

# OUR STRATEGY

Drive premiumization  
& upgradation



Invest in Market  
Development



Win in channels  
of the future



**Build Naturals**



Make core  
aspirational





# BUILDING THE NATURALS PORTFOLIO



Indulekha AV

# OUR STRATEGY

Drive premiumization  
& upgradation



Invest in Market  
Development



Win in channels  
of the future



Build Naturals



Make core  
aspirational



# MAKING CORE BRANDS ASPIRATIONAL

## Skin Cleaning – Lux



## Skin Care – Fair & Lovely



## Hair Care – Sunsilk



# MAKING CORE BRANDS ASPIRATIONAL

## LIFEBUOY

### Establish superior germ kill



### Tap into Naturals trends



### Build new formats



Lifebuoy AV





**THANK YOU!**



# THANK YOU

For More Information

## VISIT OUR WEBSITE

<http://www.hul.co.in/investorrelations/>

### Investor Relations

#### HUL Annual Investor Meet 2018

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#### RE-IMAGINING HUL

ANNUAL INVESTOR MEET | 6 JUNE 2018

Sanjiv Mehta, CEO & MD



# RE-IMAGINING MARKETING

ANNUAL INVESTOR MEET | 6 JUNE 2018



Hindustan Unilever Limited

# SAFE HARBOUR STATEMENT

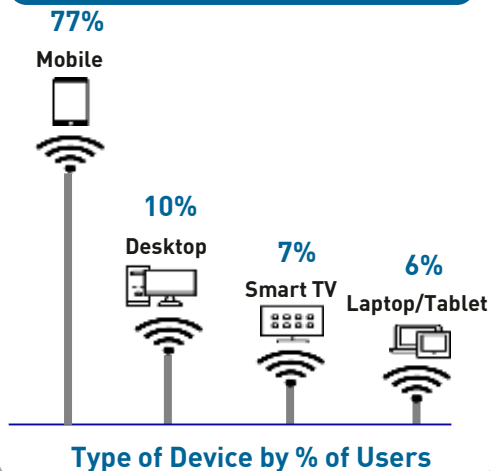
This Release / Communication, except for the historical information, may contain statements, including the words or phrases such as 'expects, anticipates, intends, will, would, undertakes, aims, estimates, contemplates, seeks to, objective, goal, projects, should' and similar expressions or variations 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 realized. 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.

# AGENDA

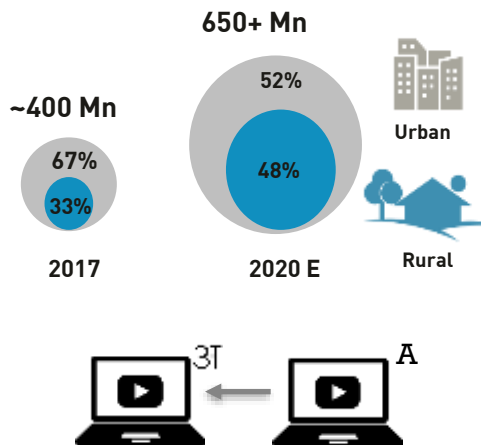
- **India Digital Landscape**
- **Impact on Marketing**
- **Reinventing Marketing @ HUL**

# DIGITAL TRENDS SHAPING INDIA

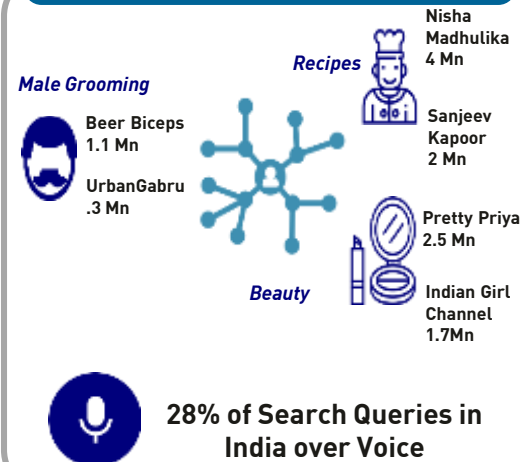
## Shift to Mobile Viewing



## Rise of Rural & Vernacular Content



## Increasing Influencers & Voice search





# MARKETING IS EVOLVING IN ITS 5<sup>TH</sup> GENERATION



## Product Orientation

Develop & sell products that one is good at making



## Market Orientation

Focus on the target customer and markets and get them to buy it



## Consumer Orientation

Understand consumers and design products to solve their problem



## Human Orientation

Engaging with people through their minds, hearts & spirits

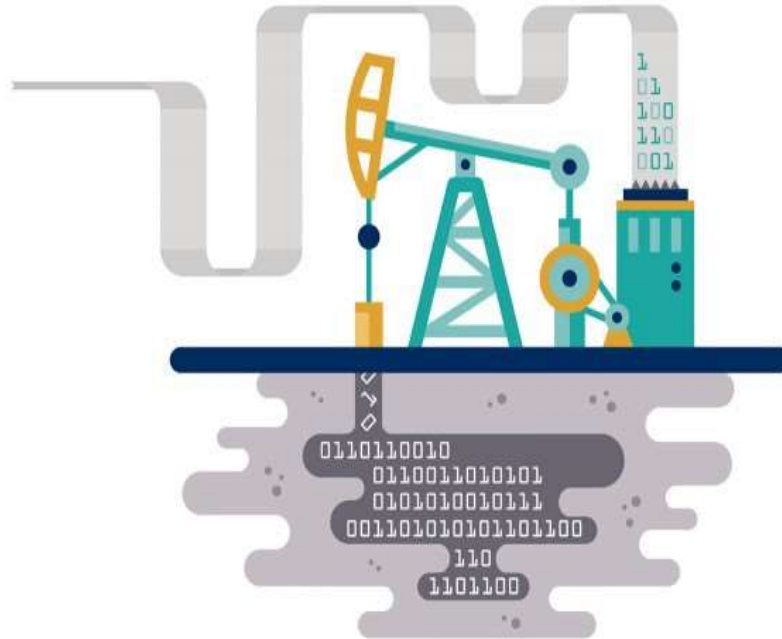


## Digital Orientation

Owning end to end consumer journey to communicate and deliver purposeful, personalised solutions



# DATA IS THE NEW OIL

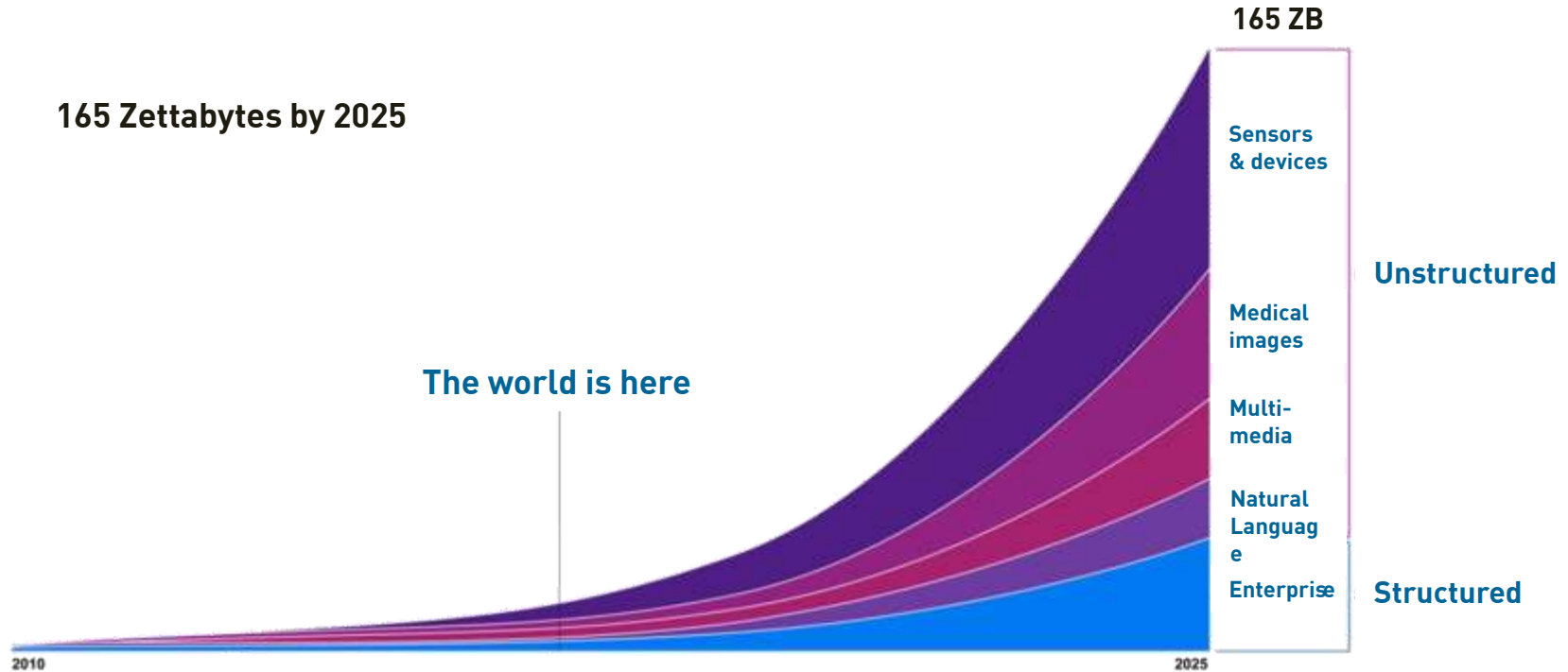


*Data is no longer just a by-product of doing business:  
it's an asset like our brands, factories and selling systems*



# OUR WORLD IS CHANGING

165 Zettabytes by 2025



\*Source IDC. IBM projections based on analyst report

# HOLISTIC VIEW ON DATA



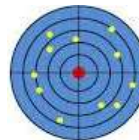
## INTERNAL

*Examples: Sales,  
Distribution, Penetration*



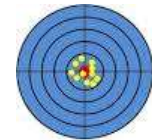
## ECOSYSTEM

*Examples: Points of Interest,  
Demographics,*



## MIXED

*Internal + External*

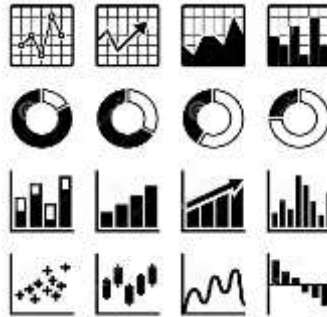
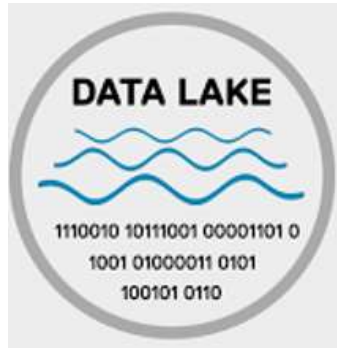


Looking beyond  
the rows and  
columns



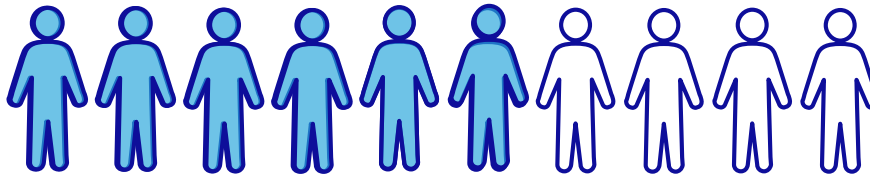


# DATA DRIVEN CULTURE



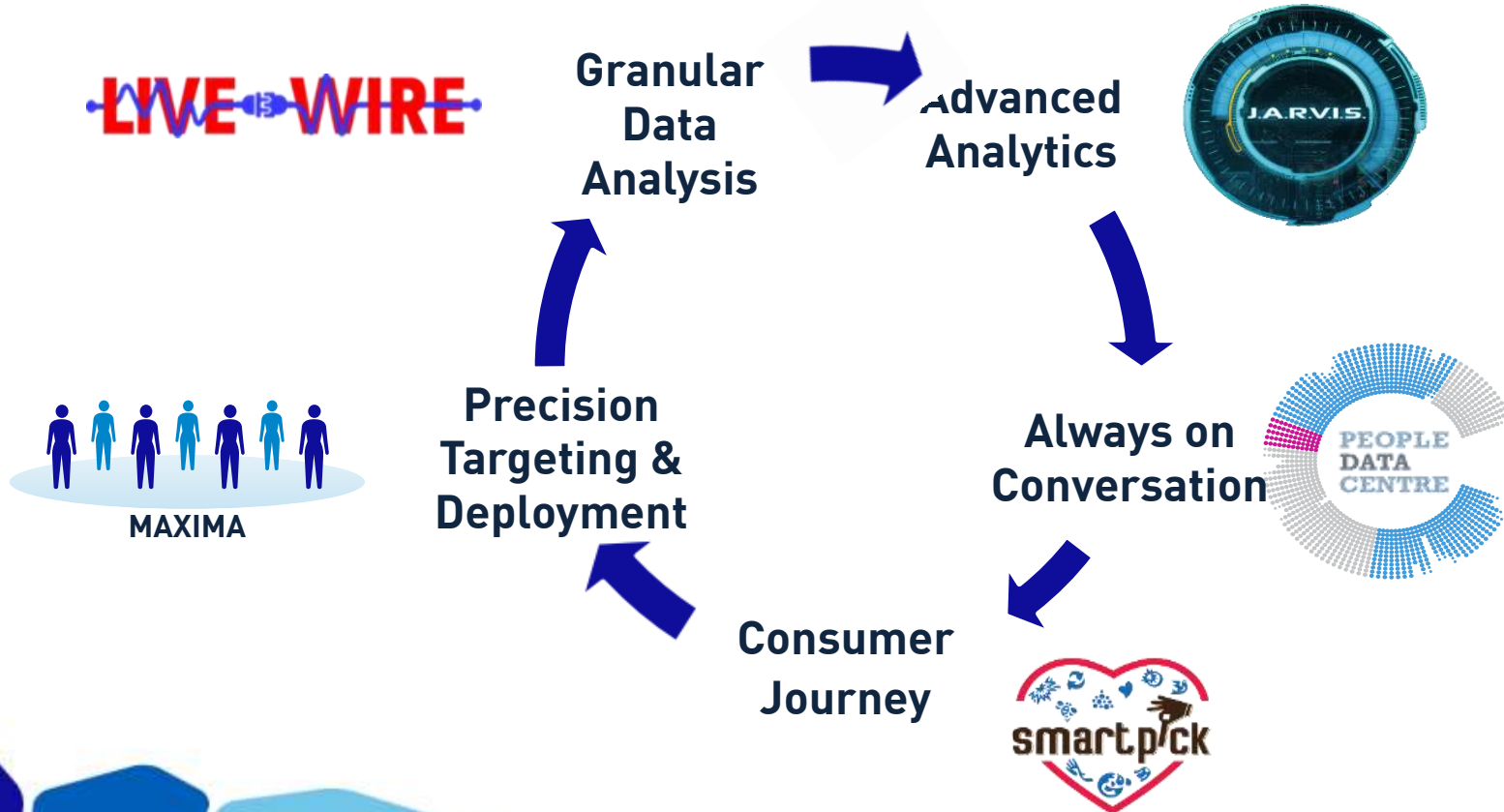
**Democratizing Data**

**Data scientists now an integral part of Business Teams**



**Digital & Data savvy teams**

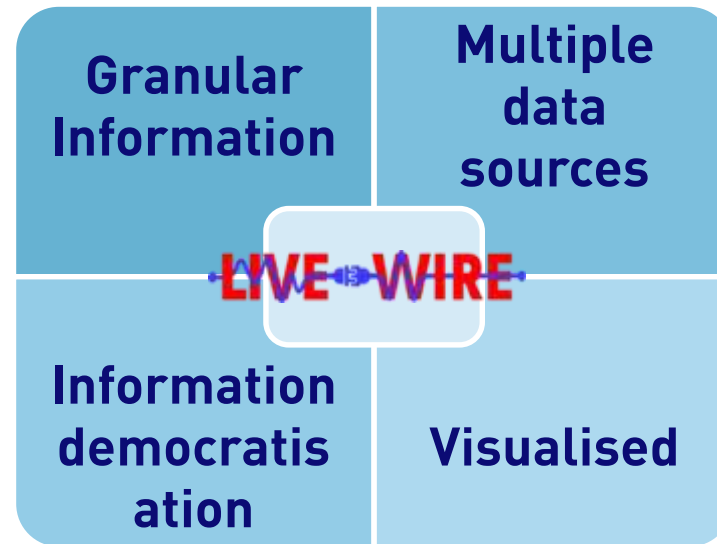
# CAPABILITIES ACROSS THE MARKETING VALUE CHAIN





## GRANULAR DATA ANALYSIS

# LIVEWIRE





## ADVANCED ANALYTICS

## Predictive analytics building on Livewire

### Democratising Data



### Processing



### Enabling Decisions



PRICE

ADVERTISING  
& PROMOTION

TRADE  
SPENDS

## How is predictive analytics better?



Analytics methodology

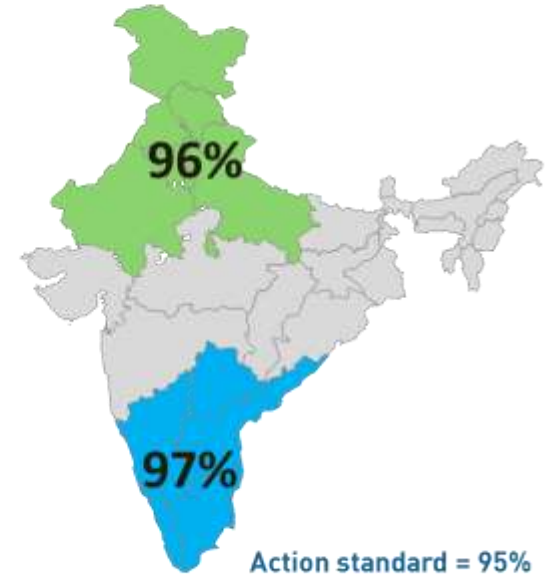


Levers & Variables



De-Averaged Output

## Jarvis in Action: Superior Accuracy







**ALWAYS 'ON' CONVERSATION**

# PEOPLE DATA CENTRE (PDC)

## Capabilities built through the PDC

Understanding Consumer Perceptions about Brand	Celebrity Assessment	Understanding Strength and Weaknesses of Brands	Understanding Category
Campaign Analysis	Impact of Macro Economic factors on business		Emerging Consumer Needs
Influencer Identification	Crisis Management	Command Centre	Reasons to use or not use certain product categories
Ecom learnings	Spotting Trends	Competition Tracking	Strategic Understanding

## Benefits of using PDC



Half the Time



Half the Cost



Rigorous & Holistic



Double the Impact



## CONSUMER JOURNEY

## Traditional Market development



## Limitations



Cost



Access to  
LSM 8+

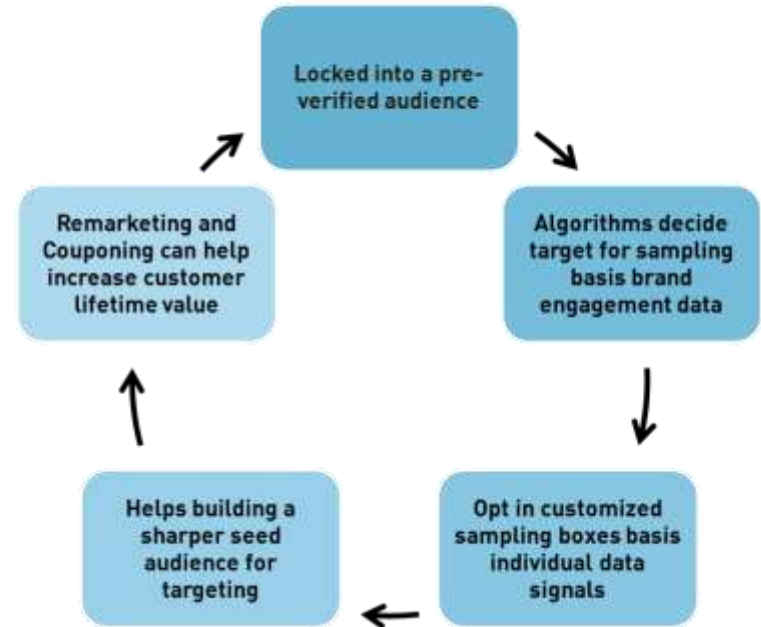


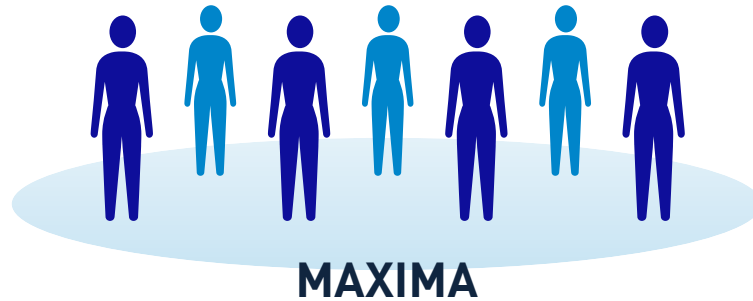
Mass  
Targeting



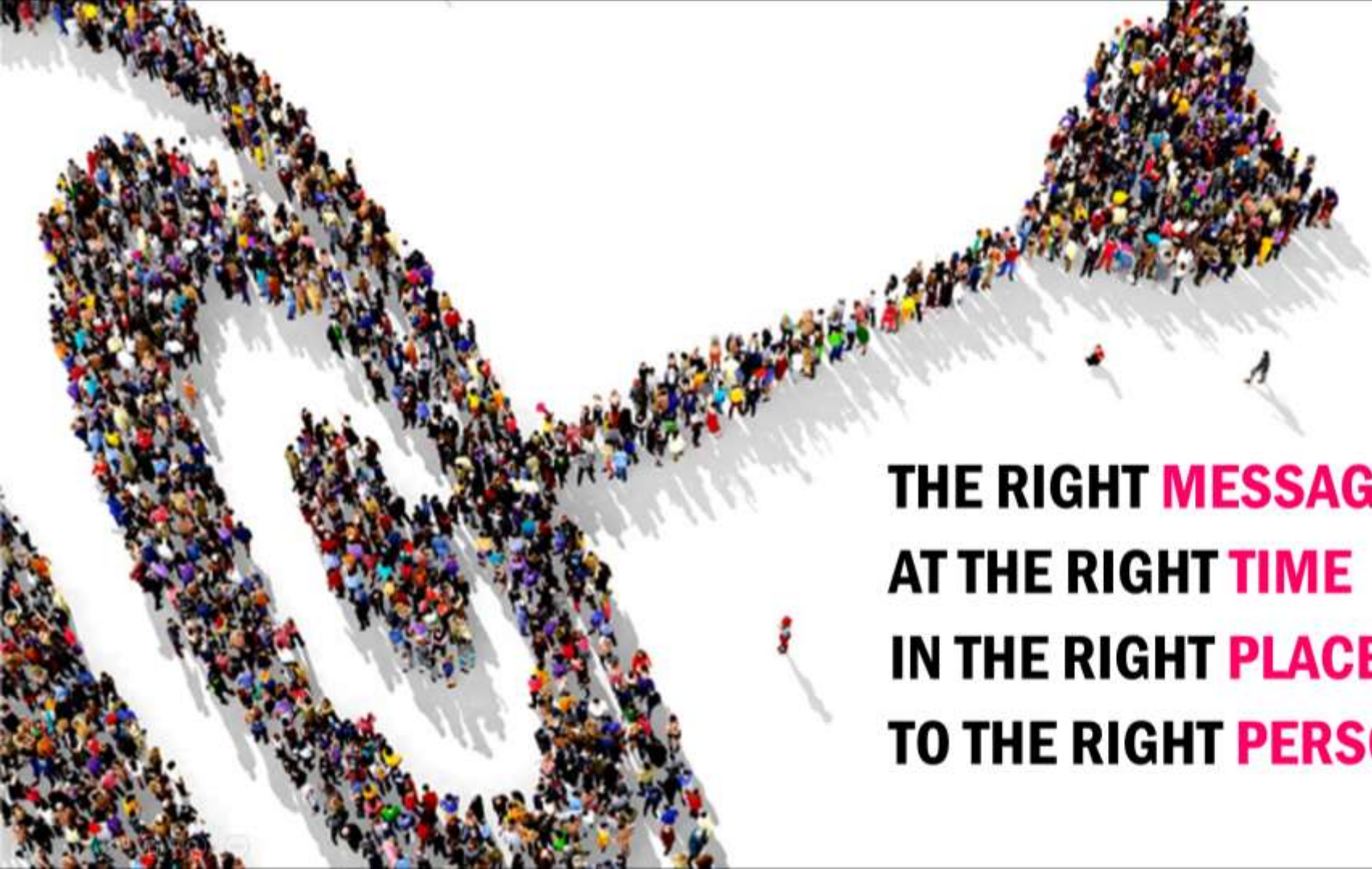
Promoter driven  
experience

## Smartpick: Led by data driven algorithms





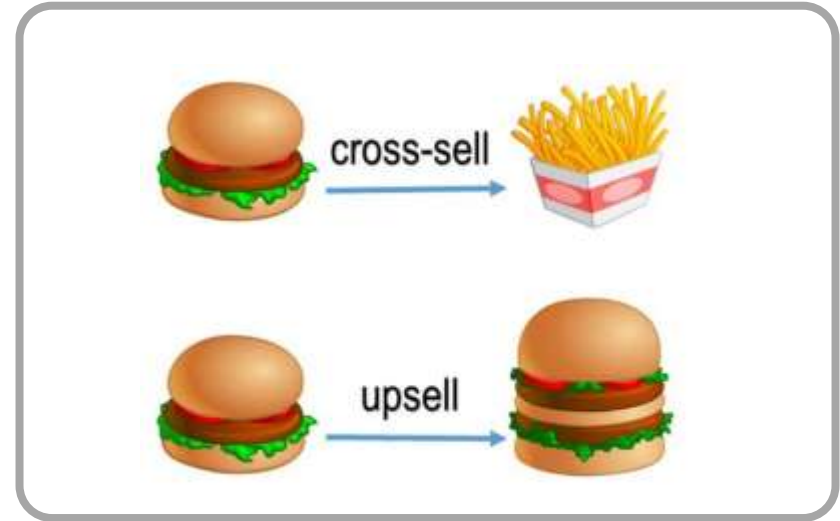
# PRECISION TARGETING & DELPOYMENT



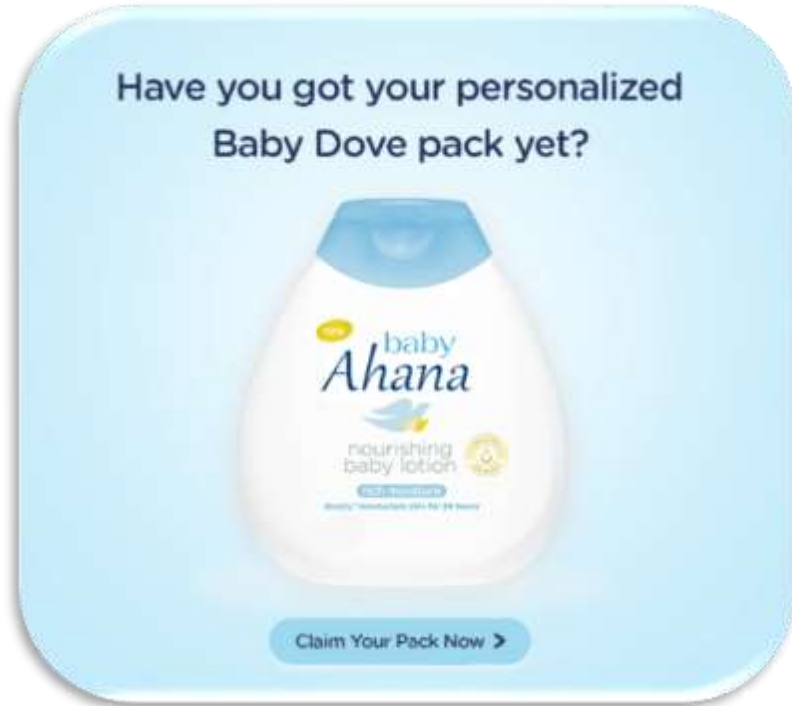
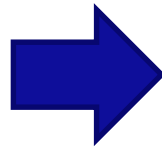
**THE RIGHT MESSAGE  
AT THE RIGHT TIME  
IN THE RIGHT PLACE  
TO THE RIGHT PERSON**



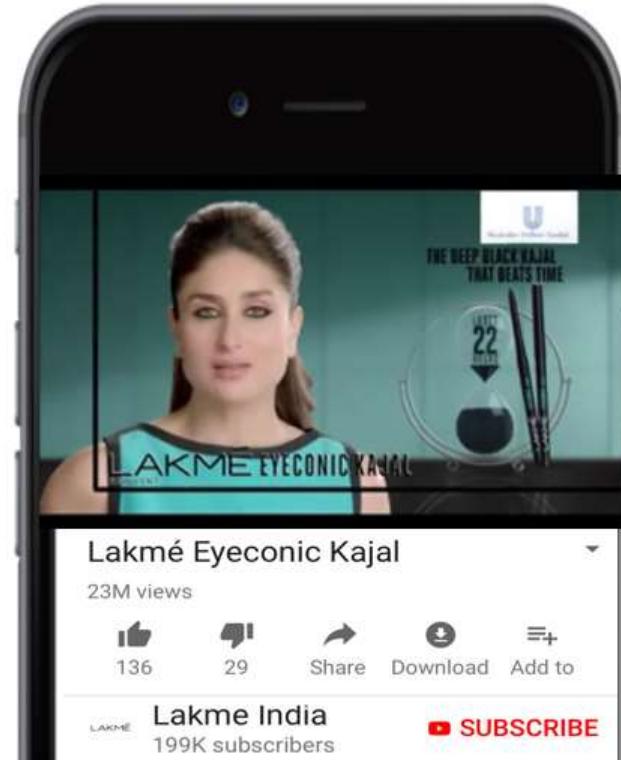
# SHARPER TARGETING



# PERSONALISED PACKAGING



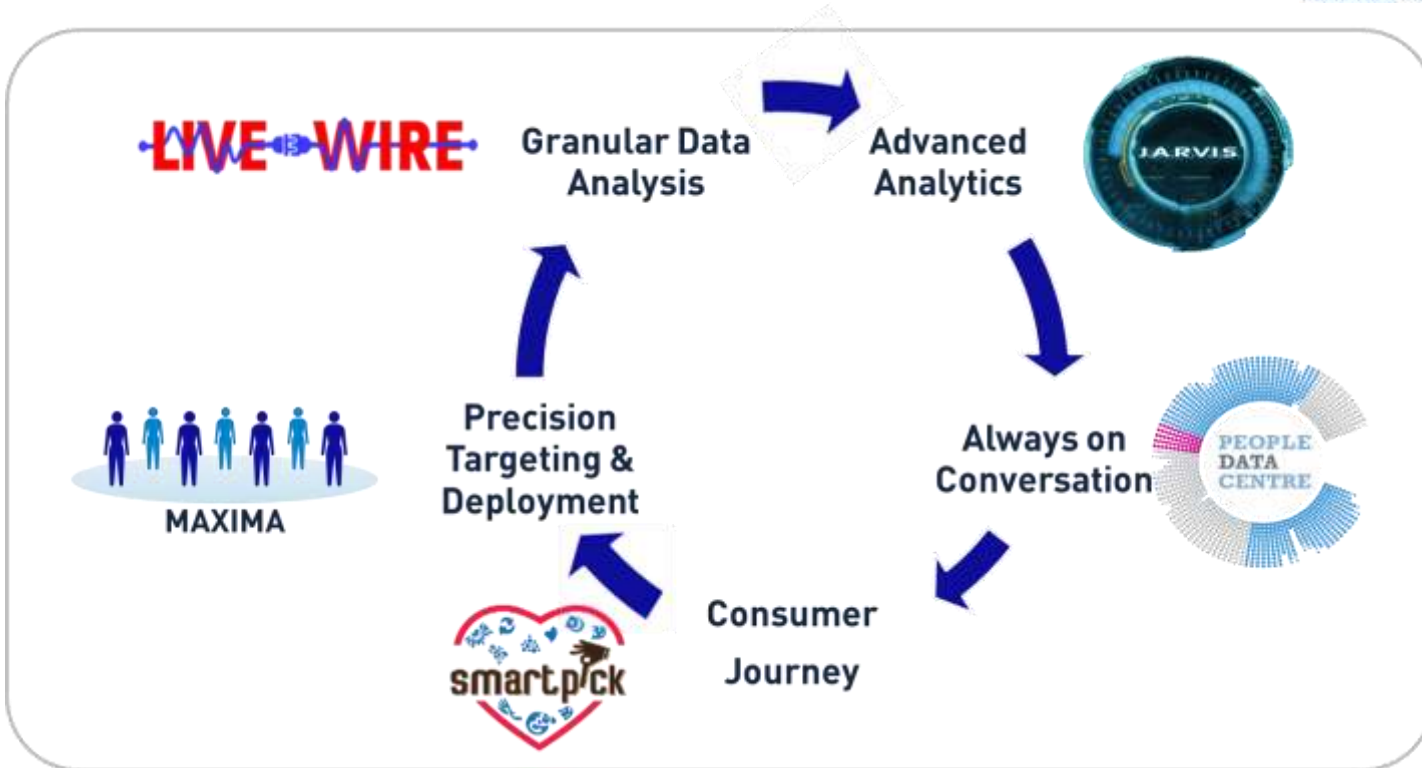
# WHAT CONSUMERS SAW ON THEIR PHONES





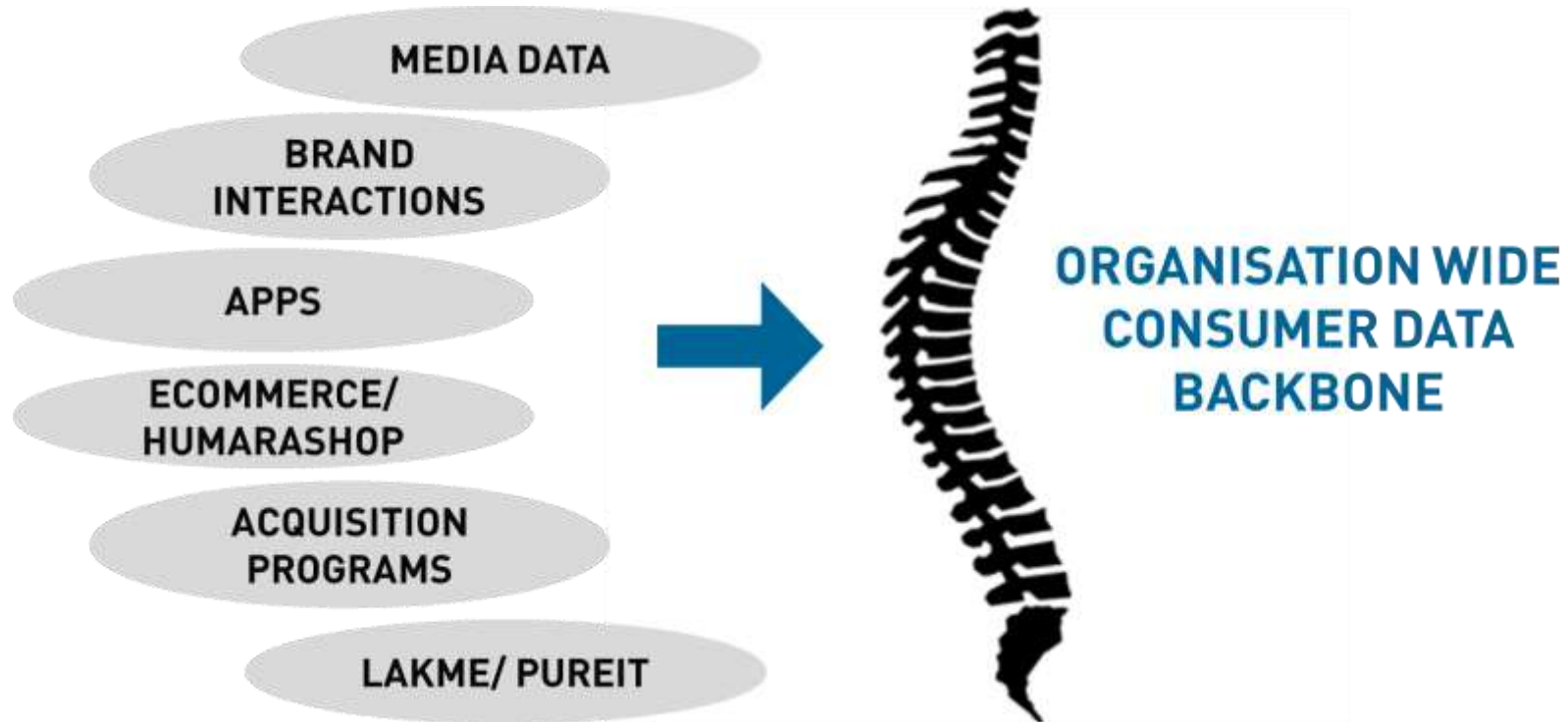
putting it all  
**TOGETHER**

# IN SUMMARY



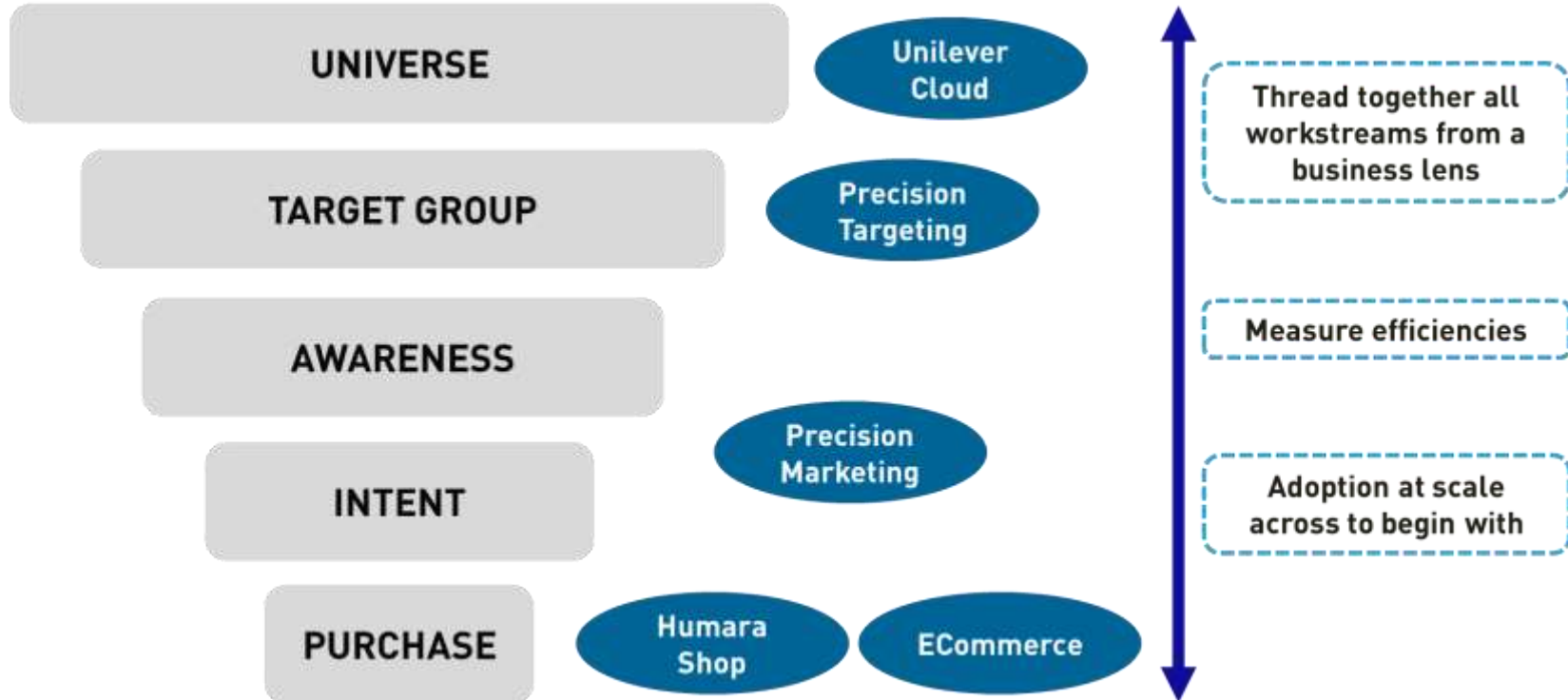
Re-imaging the consumer value chain end-to-end

# CONSUMER DATA: AN ORGANISATION WIDE CAPABILITY





# AN ORGANISATION WIDE END TO END VIEW



To ***Capture and Use*** Consumer Digital Data Signals to Build

# Data Driven Marketing Funnels

that are ***Efficient and Scalable***



**"IT'S NOT THE STRONGEST OF THE  
SPECIES THAT SURVIVES,  
NOR THE MOST  
INTELLIGENT. IT IS THE ONE  
MOST ADAPTABLE TO CHANGE."  
- CHARLES DARWIN**

# THANK YOU

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