

CATEGORY UPDATES

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.



FOODS & REFRESHMENT

SUDHIR SITAPATI

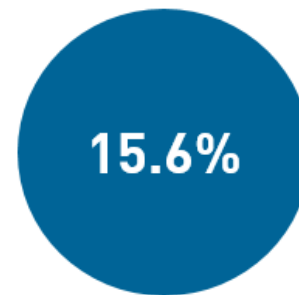
FY 2017-18 PERFORMANCE HIGHLIGHTS



**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)**



OUR STRATEGY

**Drive premiumization
& upgradation**



**Invest in Market
Development**



**Win in channels
of the future**



**Winning in Many
Indias (WiMI)**



FOODS: DRIVING PREMIUMIZATION THROUGH VARIANTS



Hindustan Unilever Limited



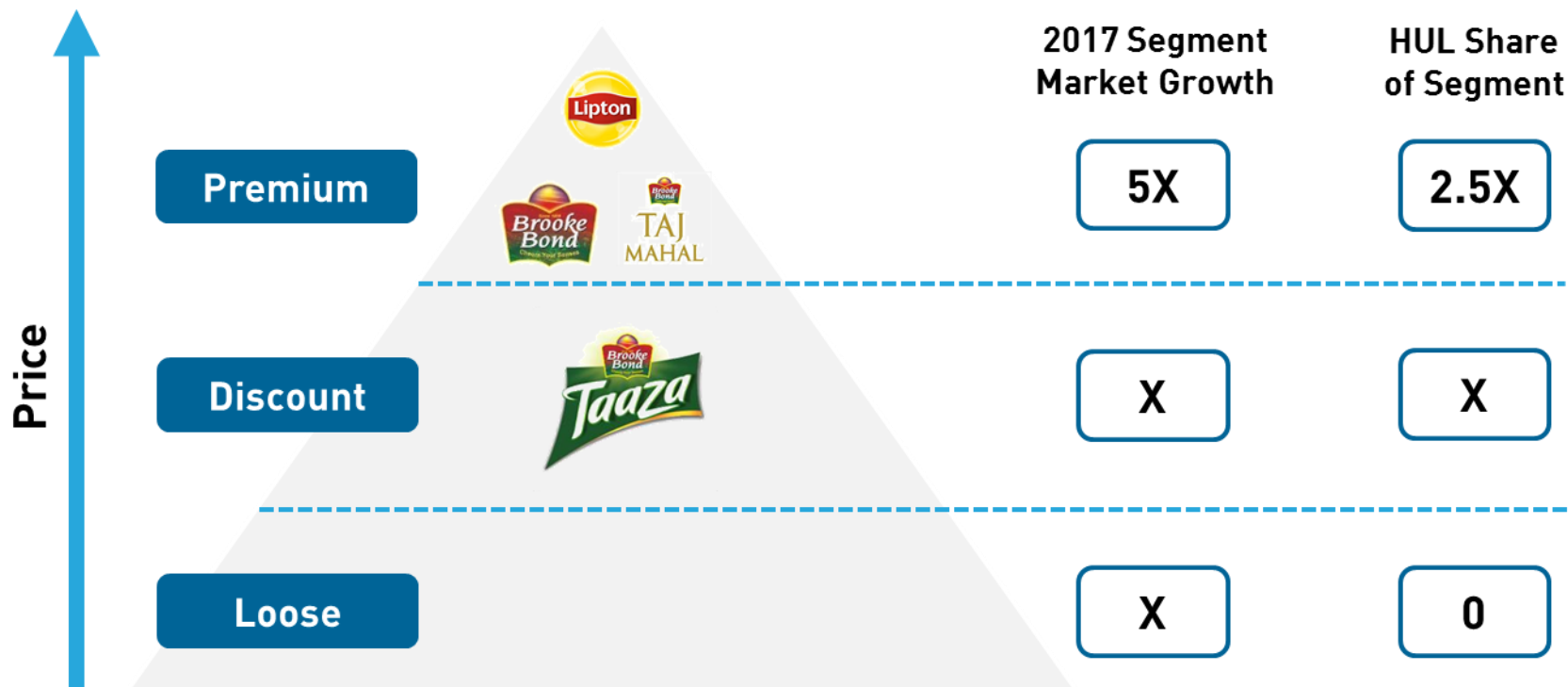
Accretive to foods portfolio
by **580 bps**

...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

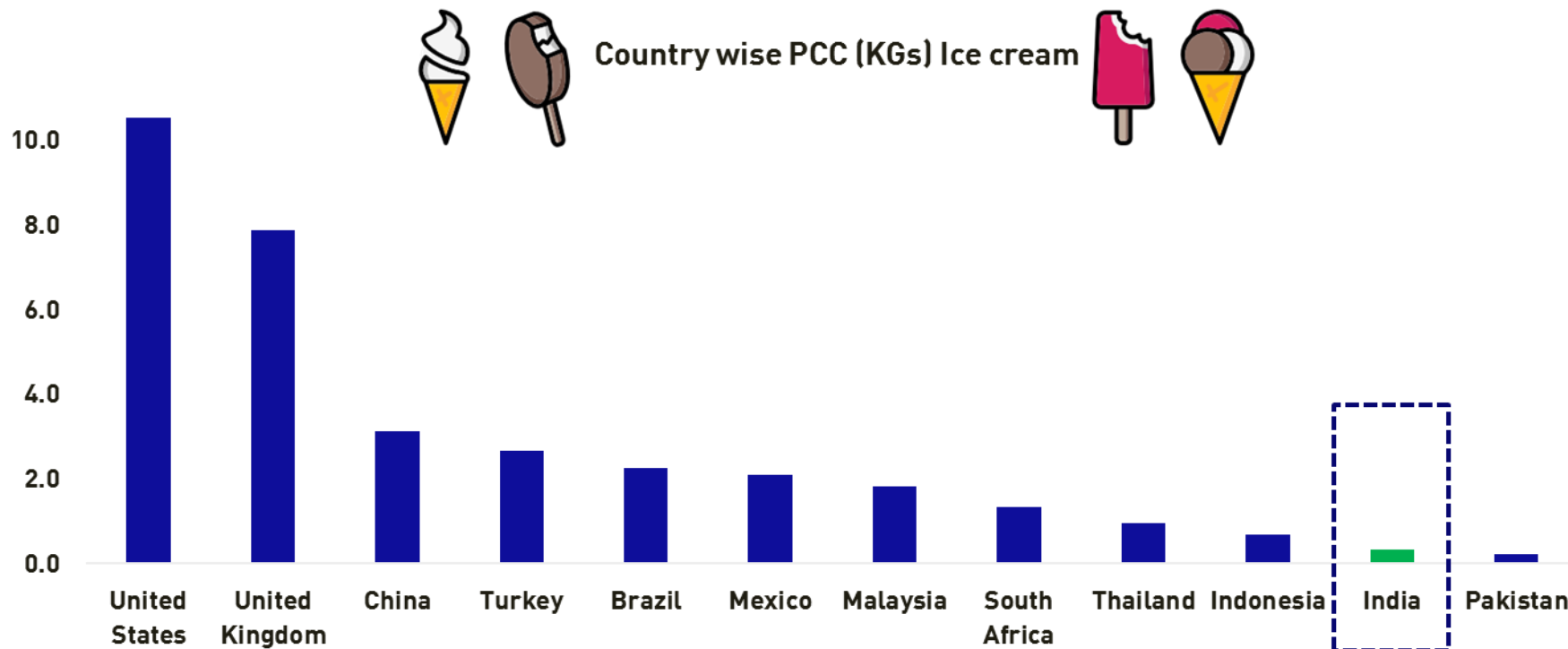


Road test the mix in Chennai before scale up to rest of India



Lever ayush Foods AV

ICE CREAM CONSUMPTION: INDIA VS. THE WORLD



DEVELOPING NEW SEGMENTS IN ICE CREAMS



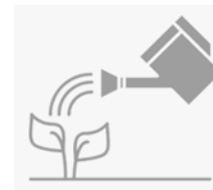
Cornetto Oreo & Kwaliti Wall's Sandwich AV

OUR STRATEGY

Drive premiumization
& upgradation



Invest in Market
Development



Win in channels
of the future



Winning in Many
Indias (WiMI)

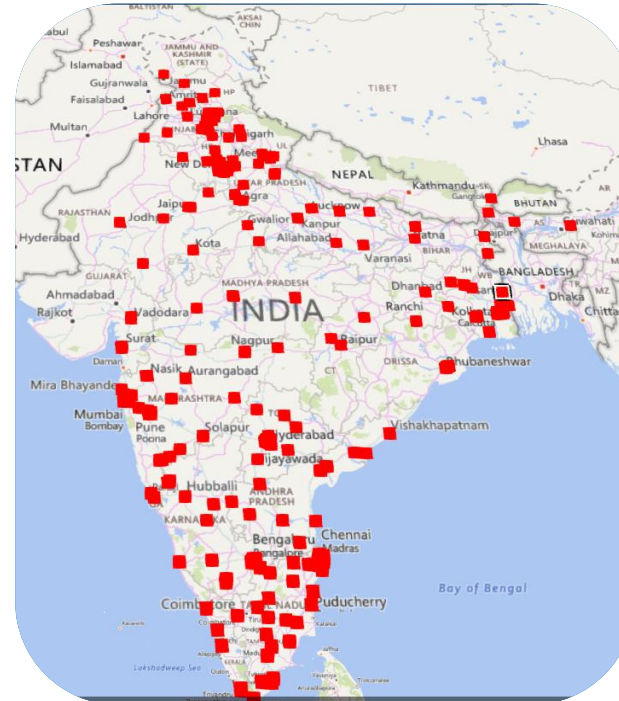


KWALITY WALL'S PRESENCE: FROM 40 CITIES TO 400 PLUS CITIES

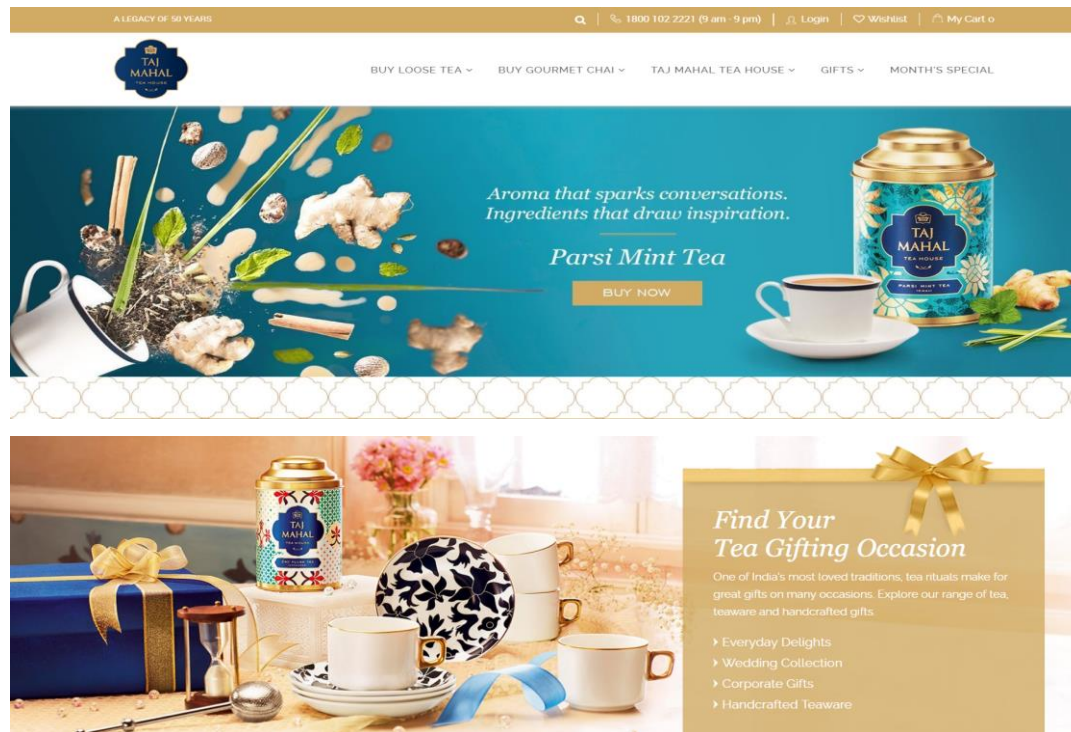
YEAR 2014



YEAR 2018



TAJ MAHAL ECOMMERCE SITE



Taj Mahal Tea AV

FOODS: TAPPING THE DIGITAL LANDSCAPE WITH SEEK-OUT CONTENT



tato Cheese Balls - Cheese Balls in Tamarind Sauce Recipe - Quick & Easy Snack Recipe For Kids



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





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
& upgradation**



**Invest in Market
Development**



**Win in channels
of the future**

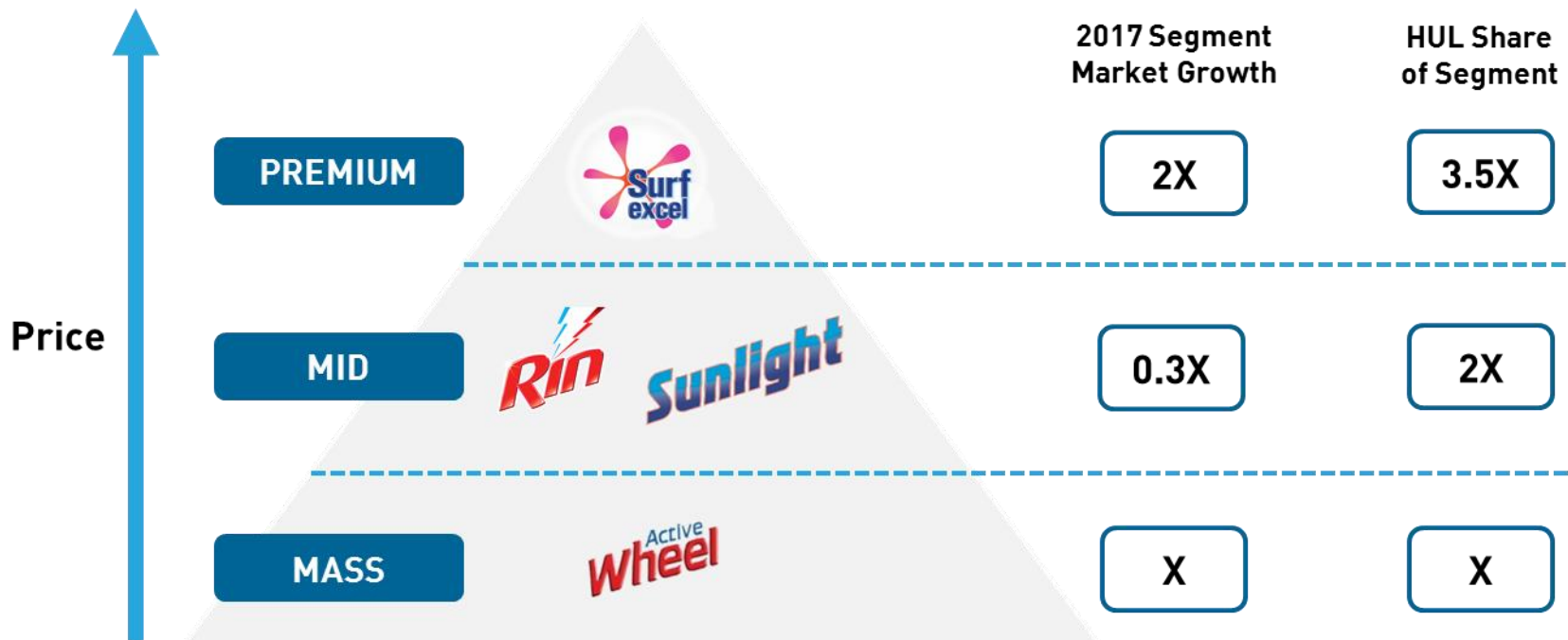


Grow Profitably



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

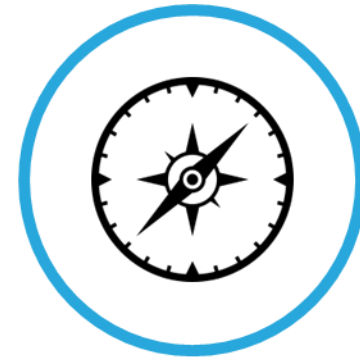
BUT IMPORTANT TO REMAIN COMPETITIVE IN MASS EVEN AS WE UPGRADE THE MARKET



Value, not price



Sharp choices



**Building a
purposeful brand**

BUILDING A PURPOSEFUL WHEEL



Active Wheel AV

OUR STRATEGY



Hindustan Unilever Limited

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

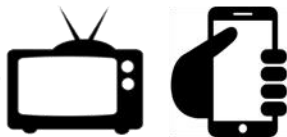


Forced Trials

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


GROFERS









OUR STRATEGY

Drive premiumization
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Invest in Market
Development



Win in channels
of the future



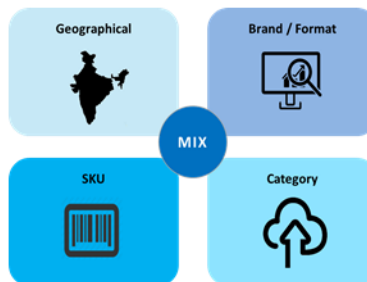
Grow Profitably



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

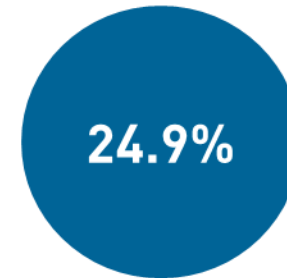
FY 2017-18 PERFORMANCE HIGHLIGHTS



**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



Hindustan Unilever Limited

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

Drive premiumization
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Invest in Market
Development



Win in channels
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Build Naturals



Make core
aspirational



ACCELERATE PREMIUMIZATION

New benefit spaces



Leading trends



Lakmé AV

OUR STRATEGY

Drive premiumization
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Development



Win in channels
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

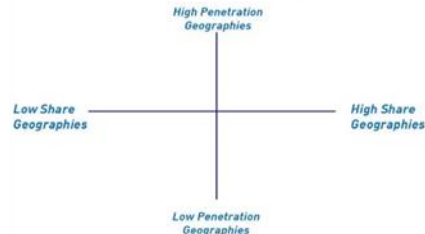
Access Packs



Winning in Many Indias (WiMI)



Cluster based jobs & marketing campaigns



Sampling



Sampling in 2017 = 1.5X 2016

OUR STRATEGY

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Invest in Market
Development



Win in channels
of the future



Build Naturals



Make core
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



Hindustan Unilever Limited

Contextual targeting



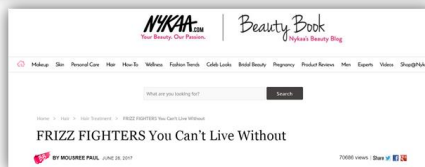
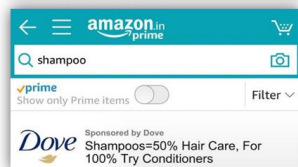
Leveraging
Search



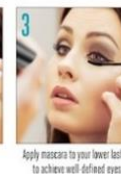
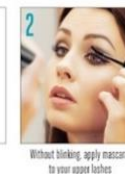
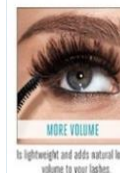
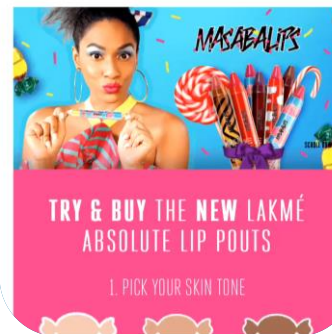
Leveraging
Seasonality



Penetration through
Brand Intelligence



Content to drive conversion



LEADING IN A DIGITAL WORLD WITH MEASURABLE METRICS



Hindustan Unilever Limited

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



Hindustan Unilever Limited



Indulekha AV

OUR STRATEGY

Drive premiumization
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Invest in Market
Development



Win in channels
of the future



Build Naturals



Make core
aspirational



MAKING CORE BRANDS ASPIRATIONAL



Hindustan Unilever Limited

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

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

