



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
CIN: L15140MH1933PLC002030

2nd June, 2017

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 2017

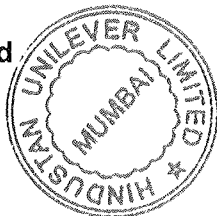
This is further to our letter dated 22nd May, 2017, intimating that the Annual Investor Meet, we are attaching herewith the presentations shared with the Investors at the Annual Investor Meeting. The said presentation is also being uploaded on the Company website.

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



AM

WINNING DECISIVELY

ANNUAL INVESTOR MEET | 2 JUNE 2017

Sanjiv Mehta, CEO & MD



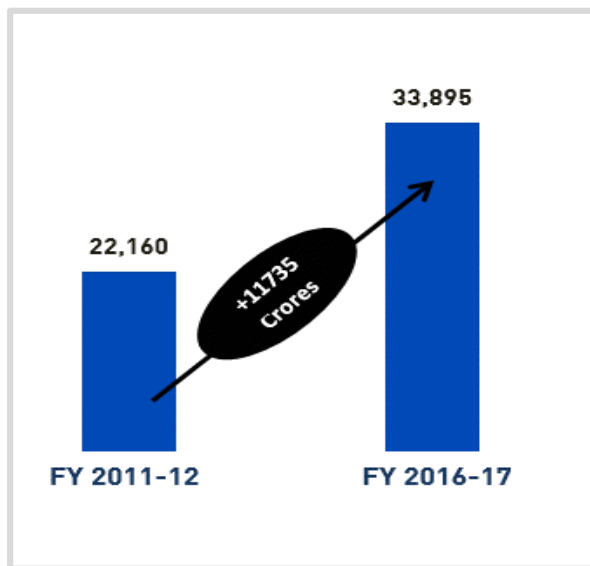
Hindustan Unilever Limited

SAFE HARBOUR STATEMENT

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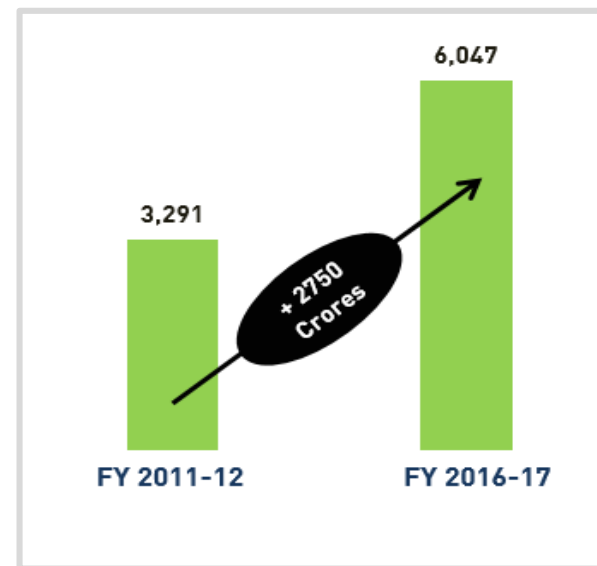
HUL PERFORMANCE - LAST 5 YEARS AT A GLANCE

Net Sales



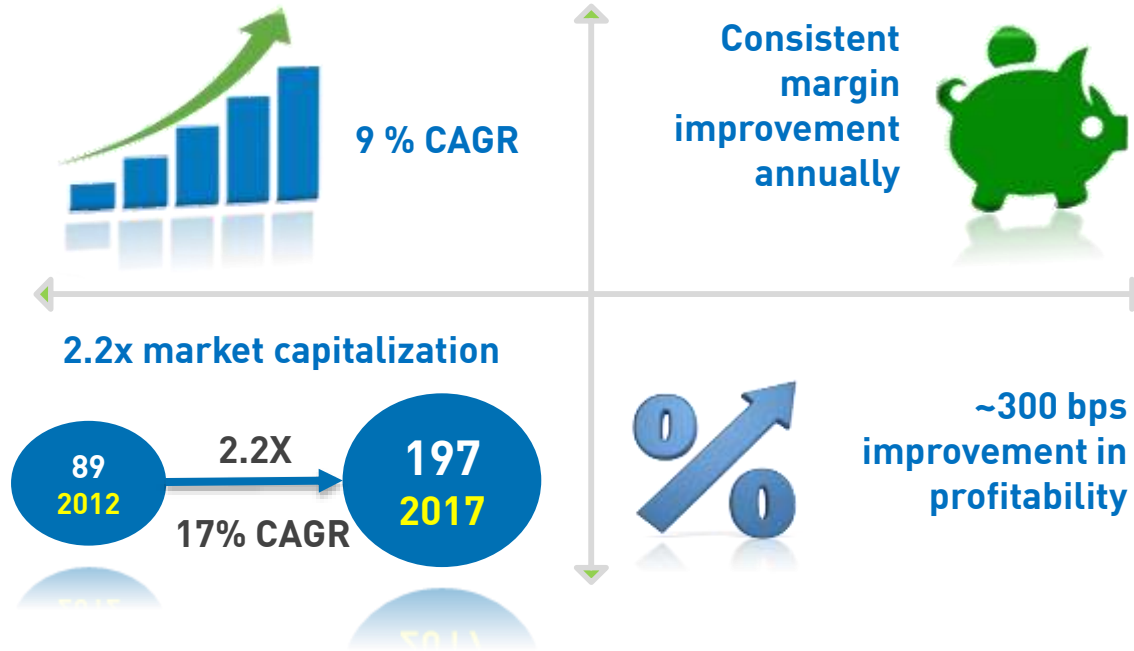
~12,000 Crores added

EBITDA



EBITDA 1.8X

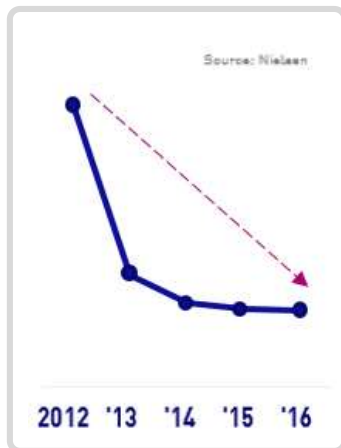
STRATEGY ON TRACK AND DELIVERING IN LAST 5 YEARS



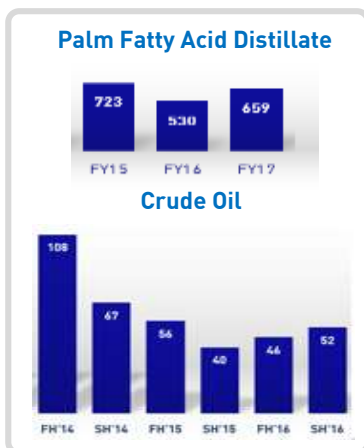
Consistent, Competitive, Responsible, Profitable Growth delivered

FY 2016-17: CHALLENGING ENVIRONMENT

Subdued Consumer markets



Volatile Commodity costs



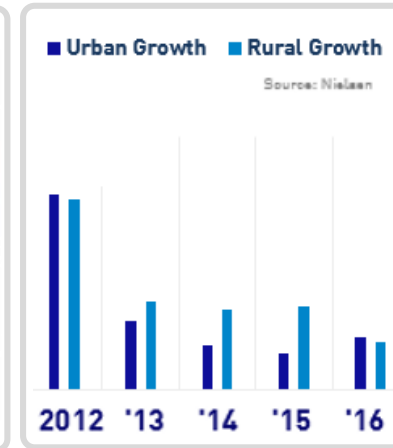
Climate Extremities



Demonetization



Rural growth yet to recover



Yet Resilient Performance Delivered: 4% USG; 1% UVG; +38 bps EBITDA margin

CONTINUING TO BUILD BIGGER BRANDS & WINNING WITH CONSUMERS

19 BRANDS > 500 crores

6 Rs. 2000 CR + BRANDS



5 Rs. 1000 CR + BRANDS



8 Rs. 500 CR + BRANDS



7 BRANDS feature in 'Top 20 Most Trusted Brands' 2016 edition



RETAINING TOP EMPLOYER POSITION

Employer of Choice



6th YEAR in a row

#1 Employer



Mid Career recruits &
Women

Dream Employer



8th YEAR in a row

HUL: WINNING DECISIVELY



Hindustan Unilever Limited

WE REMAIN OPTIMISTIC ON THE INDIA GROWTH STORY

India stands to become one of the largest growth engines in the world, according to research in a new **McKinsey Global Institute(MGI)** report

-September 2016

India's fastest growing economy tag faces no risk from China anytime soon, confirms the **IMF**

-April 2017

The Indian economy will see an over three-fold expansion at USD 7.25 trillion by 2030 and clock an average growth rate of 8 per cent over the next 15 years: **Niti Aayog**

-April 2017

India will be fastest-growing economy for coming decade: **Harvard** researchers

-January 2016



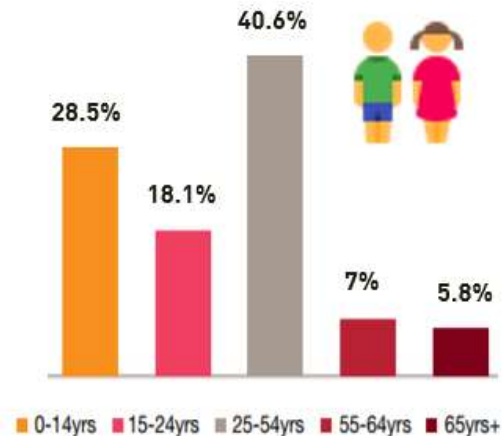
India to surpass Germany as 4th largest economy by 2022, but hard work ahead: **IMF**

-April 2017

AND POSITIVE ON MID-LONG TERM OUTLOOK FOR FMCG

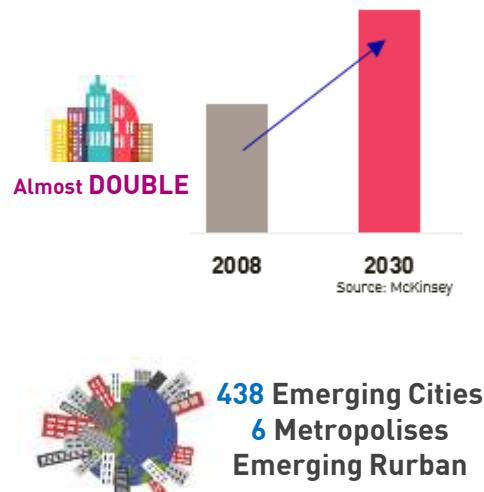
Millennials

Age profile of Indian Population

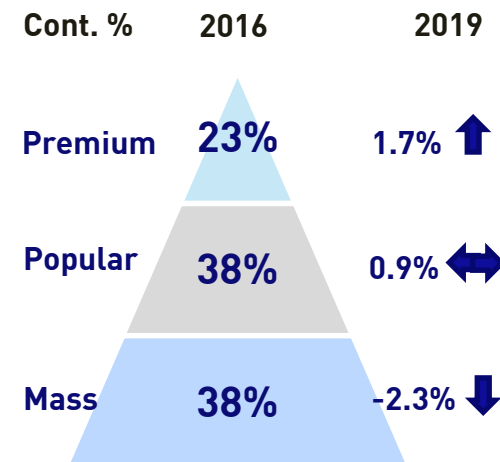


Increasing Urbanization

Population in cities



Premiumisation



OUR STRATEGY REMAINS UNCHANGED

A Compelling Framework



A Model Which Works



A Clear Set of Goals

- Consistent **Growth**
- Competitive **Growth**
- Profitable **Growth**
- Responsible **Growth**

WINNING DECISIVELY



1

Winning with brands and innovation

2

Winning in the marketplace

3

Winning through continuous improvement

4

Winning with people

5

Unilever Sustainable Living Plan

WINNING WITH BRANDS & INNOVATION

KEY THRUSTS

Strengthening the core



Building brands with purpose



Innovating across the portfolio



Market Development



Addressing needs of all consumers



Strengthening Naturals



Magic and craftsmanship



STRENGTHENING THE CORE



Hindustan Unilever Limited



Surf Excel



Lux



Red Label



Kissan



Vim



Dove



BUILDING BRANDS WITH PURPOSE



INNOVATING ACROSS THE PORTFOLIO



MARKET DEVELOPMENT

BUILDING CATEGORIES OF THE FUTURE

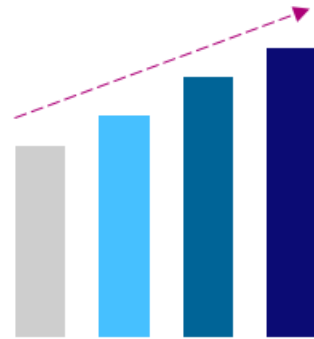
How these categories have evolved over the years



Male grooming



Hair Conditioners



■ 2013-14 ■ 2014-15
■ 2015-16 ■ 2016-17

Strong double digit growth,
every year



Hand Wash



Face Wash



Liquids



Fabric conditioners



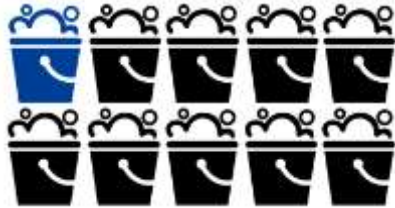
Green Tea



Body Wash

ADDRESSING NEEDS OF ALL CONSUMERS

Only 1 in 10 washes uses a HUL
Premium laundry powder



Huge scope for premiumization



Democratizing trends across core, while driving premiumization

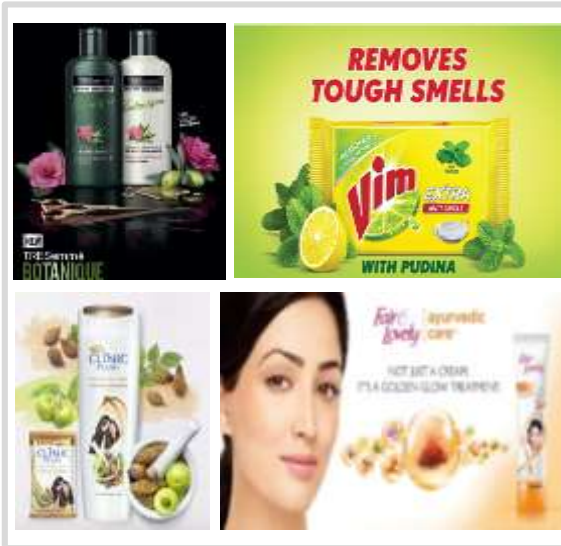
ADDRESSING NEEDS OF ALL CONSUMERS



Democratizing trends across core, while driving premiumization

STRENGTHENING NATURALS

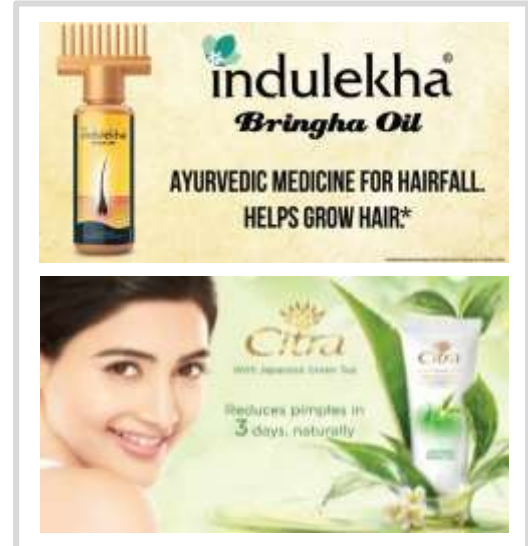
Within Existing Brands



Building Master Brands



Building Specialist Brands



MAGIC & CRAFTSMANSHIP WITH DIFFERENTIATED CONTENT

Television



Website



Social Media



Digital video



E-Commerce



MAGIC & CRAFTSMANSHIP

WITH DIFFERENTIATED CONTENT



PRM +
Online Behaviour +
FB Look Alikes



250K
Makeup Junkie Personae
Targeted
2x
Click Throughs achieved

Create → Curate → Channelize



100+ partners, 900+ ideas, 100 shortlisted



Hindustan Unilever Limited

WINNING IN THE MARKET PLACE

KEY THRUSTS

Winning in Many Indias (WiMI)



Effective coverage and assortment

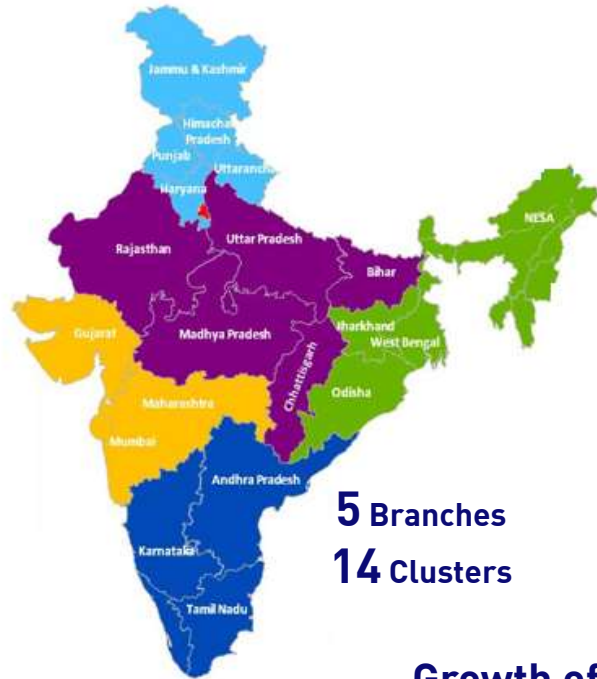


Partner of choice across all channels



WINNING IN MANY INDIAS (WIMI)

HELPING TURBO CHARGE GROWTH WITH AGILITY



5 Branches
14 Clusters

Cluster Specific Mixes – Content,
Communication, Schemes



Active
wheel



Growth of last 2 years of Central Branch > All India Average

EFFECTIVE COVERAGE & ASSORTMENT

MORE THROUGHPUT FROM MORE STORES

More Stores



More Assortment



Every Day Perfection



More Assortment in More Stores at More Frequency

EFFECTIVE COVERAGE & ASSORTMENT

MORE THROUGHPUT FROM MORE STORES

Technology

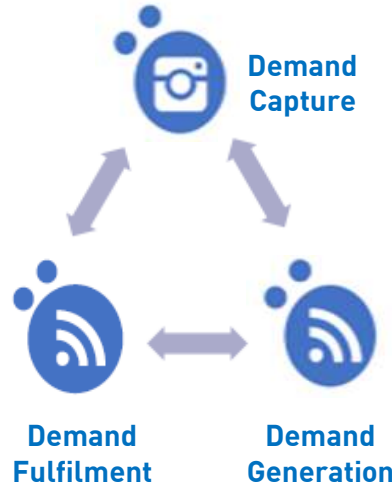


What to sell to the store



Tailor made Assortment for
'every' store

Differentiated approach



Upskilling the talent



Training

Development



Increase
retention

PARTNER OF CHOICE ACROSS CHANNELS

Strengthening the existing channels



Wholesale



General Trade



Drug-pharmacy & beauty

Building channels of the future



Modern Trade



E-Commerce

PARTNER OF CHOICE ACROSS CHANNELS

BUILDING STRONG CAPABILITIES IN E-COMMERCE



Our market share in E commerce > Modern Trade > General Trade



Hindustan Unilever Limited

WINNING THROUGH CONTINUOUS IMPROVEMENT

KEY THRUSTS

Profitable Growth



4G
ZERO
BASED
BUDGETING

Everyday customer service & quality at the moment of truth



Building back-end capabilities



PROFITABLE GROWTH

A Business Model That Works



Max the Mix



End-to-end cost focus



Symphony



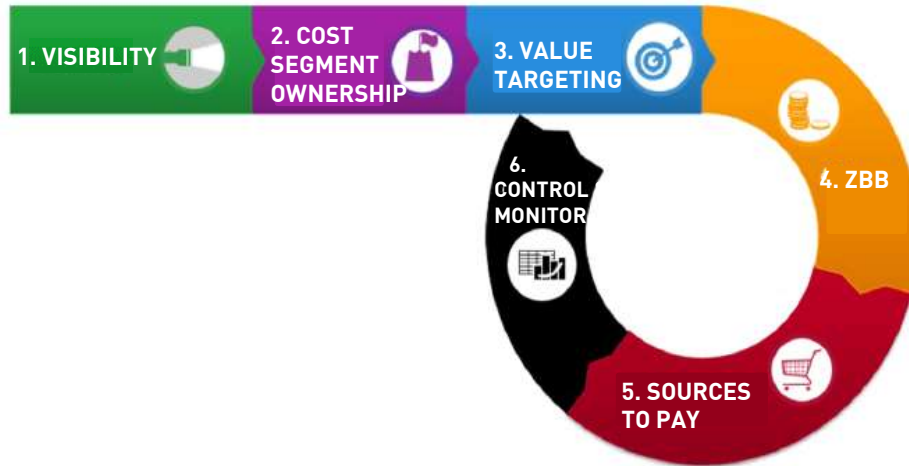
ZBB



PROFITABLE GROWTH

ZERO BASED BUDGETING (ZBB)

6 stage 'closed loop' approach to driving sustainable cost reduction



Unlocking savings by

Building a smart spending & ownership mindset



New & disruptive thinking



Cutting complexity and driving agility



Robust tracking & timely actions



EVERYDAY CUSTOMER SERVICE & QUALITY AT THE MOMENT OF TRUTH



Consumer focus



Q in Design Phase

Q @ Point of Sale

Q in End to End SC

Brilliant Quality Fundamentals



Zero Defects

Leverage IT

Drive supplier Quality

Culture and People



Q mindset in the Last mile

Distributor → Retail

Grass root Initiatives

Deliver on mix



More stores – better served

Focus packs get disproportionate attention

Outlet level focus



Loss Analysis at Customer level

Focus on customer-outlet delivery gaps

BUILD BACK END CAPABILITIES



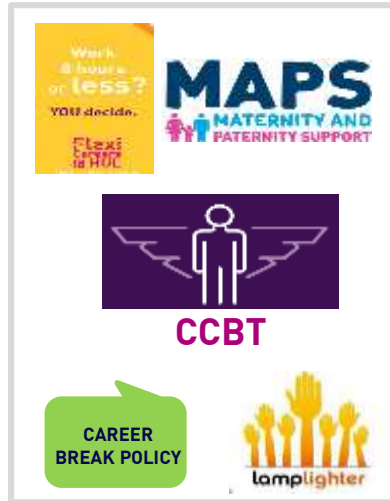


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WINNING WITH PEOPLE

WINNING WITH OUR PEOPLE

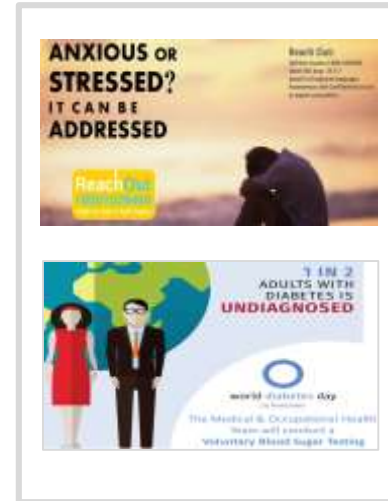
Flexible and Agile



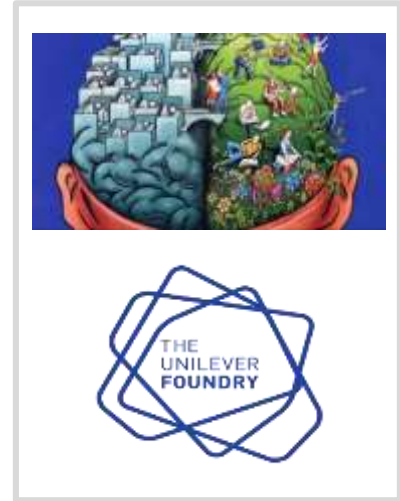
Diversity & Inclusion



Employee Wellbeing



Founders mentality



PURPOSE



PERFORMANCE,
POTENTIAL, PLAN



WELLBEING



LEARNING &
DEVELOPMENT

CCBT

FASTER, MORE CONSUMER & CUSTOMER CENTRIC, FUTURE PROOFED HUL

Brand Development



Brand Building

CROSS FUNCTIONAL CCBTs : GLOBAL – LOCAL BRAND COMMUNITIES

Consumer & Customer Centric



Bigger innovations



Faster innovations



All about experimentation, empowerment and collaboration

CCBT

INNOVATIONS LANDING FASTER



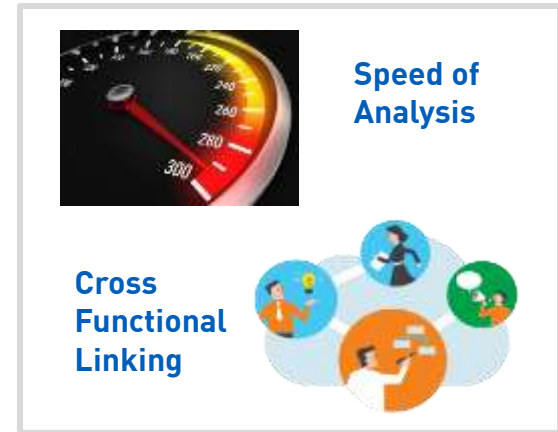
Hindustan Unilever Limited



Advanced Analytics



More Power to Users



Analytics driven insights

UNILEVER SUSTAINABLE LIVING PLAN

DOING WELL BY DOING GOOD

Enhancing livelihoods



Swachh Aadat Swachh Bharat



Water conservation



Sustainable sourcing



Weaving the Sustainability Agenda across the business

ENHANCING LIVELIHOOD

Shakti



72,000 Shakti Ammas
48,000 Shaktimaans
empowered through Project
Shakti

Brands with purpose



>390,000
Youth benefited till date



Prabhat



680,000*
People benefitted directly

SWACHH AADAT, SWACHH BHARAT

Mass Media



Haath Muh Bum
Most Viewed Campaign on YouTube
with 20 million views
75 million people reached

Swachh Basti



Touched 200,000 lives through the pilot

Swachhata Doot



Touched 200,000 lives through our 'Swachhata Doots'

HINDUSTAN UNILEVER FOUNDATION

Water Conservation



300 billion litres*
Cumulative and Collective Potential

Crop Yield



>6 lakh tonnes*
**Cumulative Annual Agriculture
Production**

Person Days Generated



>37 lakh*
Cumulative Person Days Generated

SUSTAINABLE SOURCING

Tomatoes



100% tomatoes used
in Ketchup sourced from
sustainable sources

Tea



46% Tea (16% in 2011) is
sourced from estates
certified as sustainable

SUVIDHA CENTRE LAUNCHED

URBAN WATER HYGIENE & SANITATION COMMUNITY CENTRE



Circular economy principle used to reduce water usage

Fresh water used
for brushing,
washing, bathing
etc.



Waste water from
these activities
becomes input for
flushing toilets

~10 mn litres
of water savings per annum



ADDRESSING THE HYGIENE NEEDS OF LOW INCOME URBAN HOUSEHOLDS

WINNING DECISIVELY



1

Winning with brands and innovation

2

Winning in the marketplace

3

Winning through continuous improvement

4

Winning with people

5

Unilever Sustainable Living Plan

THANK YOU

For More Information

VISIT OUR WEBSITE

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

HUL Annual Investor Meet 2017

HUL's Annual Investor Meet 2017 will be held on 2nd June 2017, Friday, at the HUL Head Office in Mumbai.

[View more](#)



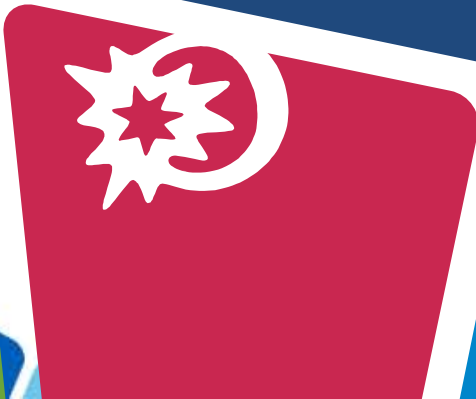
HUL INVESTOR APP



GST

ANNUAL INVESTOR MEET | 2 JUNE 2017

P.B. Balaji



Hindustan Unilever Limited

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WELCOME REFORM; WIN-WIN FOR ALL



Hindustan Unilever Limited

CONSUMER

Cheaper, better products

COUNTRY/ ECONOMY

Higher investment led growth

GOVERNMENT

Lower fiscal deficit,
higher tax base

INDUSTRY

Simpler & effective compliance,
Level playing field, Efficient SC

EXTENSIVE PREPARATIONS UNDERWAY

1) Compliance

2) Cutover

3) Value Creation

Impacts multiple areas

- Significant impacts on
 - Procurement
 - Manufacturing
 - Distribution
 - Customer Development
 - Accounting
 - Controls
 - Taxation
 - IT
- ~100 business whitepapers

Focus on IT readiness

- Significant impact on HUL systems
- Extensive testing underway to secure a smooth transition
- GSTN readiness expected soon
- Revised GSTR formats released – being understood

Supporting the eco-system

- HUL and our eco-system targeting to be ready for a July 1st transition
- Engagement to step up further in the coming days

COMMITTED TO PASS ON THE NET BENEFITS

Source of benefits

- **Reduced output tax rates**
 - Soaps
 - Toothpaste
 - Detergent bars
- **100% input credit availed**

HUL shall pass on the net benefit based on fair principles

Interplay between P&L lines likely

NEAR TERM IMPACT

Growth likely to be impacted by temporary thinning down of trade pipelines

Trade concerns	Our Response
<p>Presumptive Credit on closing stock</p> <ul style="list-style-type: none">• 40% of CGST payable available as credit <p>Margins</p> <ul style="list-style-type: none">• Impact of higher GST on their margins	<ul style="list-style-type: none">• Extensive communication to clarify• Compensate customers appropriately• Await final transition rules to further fine-tune response

IN SUMMARY

**Win- win for everyone in
the long run**

**In the near term –
Temporary thinning down
of trade pipelines likely**

**Net Benefit on tax rates
to be passed on**

**Interplay between P&L
lines likely**

THANK YOU

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HUL INVESTOR APP





HOME CARE

Priya Nair

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2016 PERFORMANCE HIGHLIGHTS

COMPETITIVE, PROFITABLE, SUSTAINABLE GROWTH

30%

Of HUL's Size

No 1 Position

In All Key Sub Categories

450+ bps

Delta Margin 2013-16

9/10 Indians

Our Consumer Franchise

LAUNDRY PORTFOLIO STRADDLES THE PYRAMID



INVESTING TO WIN IN MANY INDIAS



Capability and Portfolio to win everywhere

Tailored actions and investments for differential results

OUR STRATEGY



STRENGTHENING OUR LEADING POSITION



**Innovate For
Premiumization**



**Strengthen the
Core**



**Develop Formats
of the Future**



**Improve
Profitability**

INNOVATE FOR PREMIUMIZATION

AGGRESSIVELY DRIVING PREMIUMIZATION TO STRENGTHEN POSITION IN LAUNDRY



Hindustan Unilever Limited

Through Consumer Centric Innovations

Rin: Water Saving Detergent Bar



Surf Excel Matic Liquid



INNOVATE FOR PREMIUMIZATION

RIN BAR: WATER SAVING TECHNOLOGY THAT DELIVERS SUPERIOR BRIGHTNESS

Rinsing – 30% Of Daily Water Consumption



Increasing Instances Of Drought



INNOVATE FOR PREMIUMIZATION

SURF EXCEL MATIC LIQUID: INDIA'S FIRST LIQUID MATIC DETERGENT

Delivering Formats Of The Future And Educating Consumers



Surf Excel Matic

INNOVATE FOR PREMIUMIZATION

PREMIUMIZING DISH WASH THROUGH INNOVATION

 NOW Launching **VIM EXTRA** with *natural Pudina* !
To address one of India's biggest concern in dishwash

REMOVES TOUGH SMELLS



WITH PUDINA

Best in class 'Grease removal' +
Fragrance Technology to
Fight Toughest of food smells

Onion Garlic Masalas Egg

INNOVATE FOR PREMIUMIZATION

PUREIT: DISRUPTING CATEGORY THROUGH AFFORDABLE INNOVATIONS



Gravity Range
2008-12



Low Cost Ro & UV Range
2016-17



Premium RO + UV Range
2014-15

STRENGTHEN THE CORE

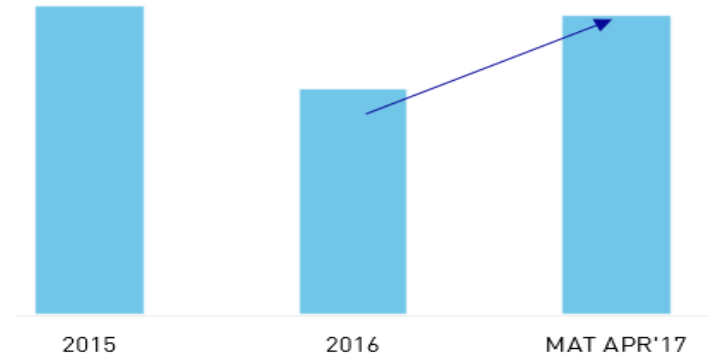
LAUNCH OF WHEEL 2-IN-1

With the dual benefits of deep clean and
Malodour Removal



Turning around the Segmental Share
Trajectory

Wheel Powder Share of Segment



DEVELOP FORMATS OF THE FUTURE



Fabric Conditioner



Dish wash Liquids

Through Education and Sampling

THE SCIENCE OF SAMPLING: UNLOCKING GROWTH

PRODUCT SAMPLING FUNNELS



WHERE?



WHAT?



HOW MUCH?

Maximizing Scale and ROMI

EDUCATING CONSUMERS WITH SCALE

REACHING OUT TO PROSPECTIVE CONSUMERS DIRECTLY

X

Mn Contacts

2014

2.5X

Mn Contacts

2016

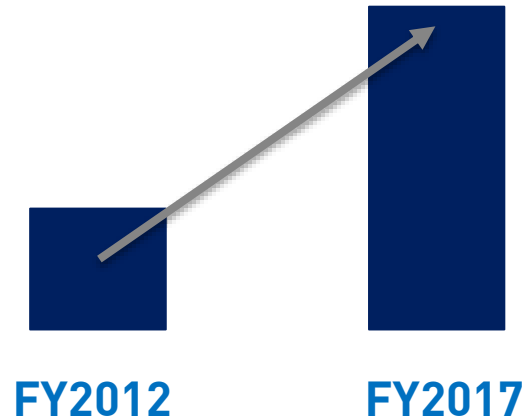
3.1X

Mn Contacts

2017

CONSISTENT PROFITABLE PERFORMANCE

450+ bps improvement in
Margin



COMPREHENSIVE MARGIN IMPROVEMENT PLAN



Increased Agility to respond better to Competition/Environment



THANK YOU

India's first transgender band
invites you to...

Aao Bajao Taali!



REFRESHMENT

Sudhir Sitapati

OUR PORTFOLIO



TEA



COFFEE



ICE CREAM &
FROZEN DESSERTS

GLOBAL POSITION

#1

NA

#1

INDIA POSITION

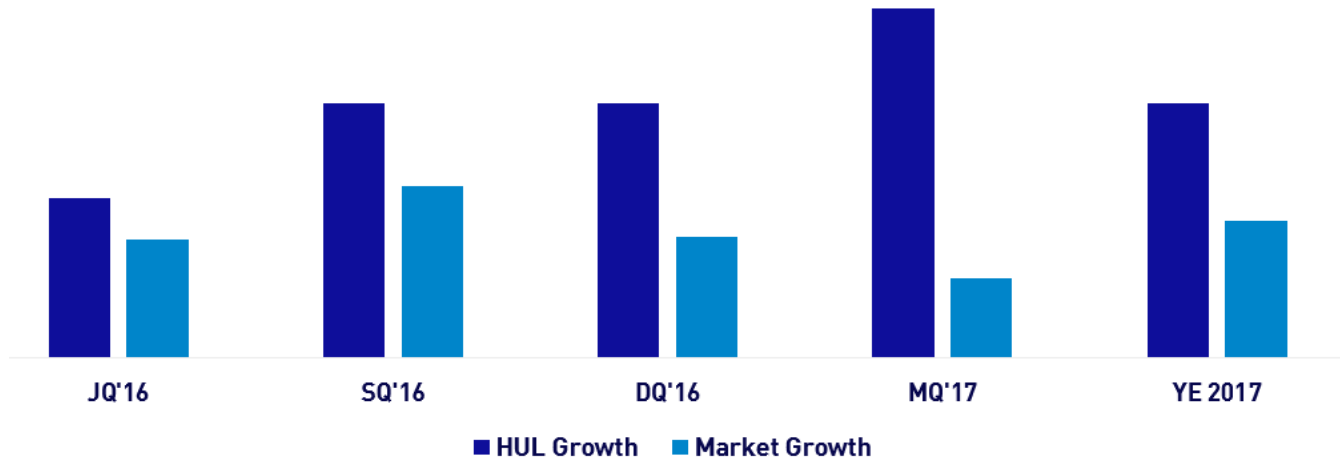
#1

#1

#2

OUR PERFORMANCE

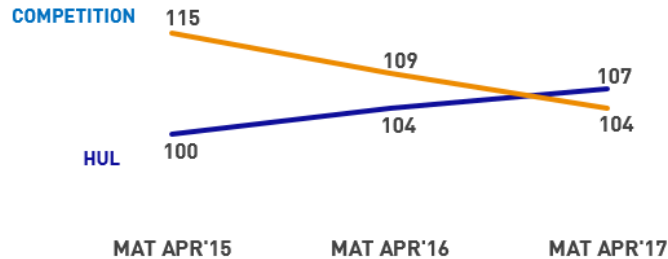
Consistently growing ahead of the Market



Turnover ~ Rs. 5000 cr. in 2017

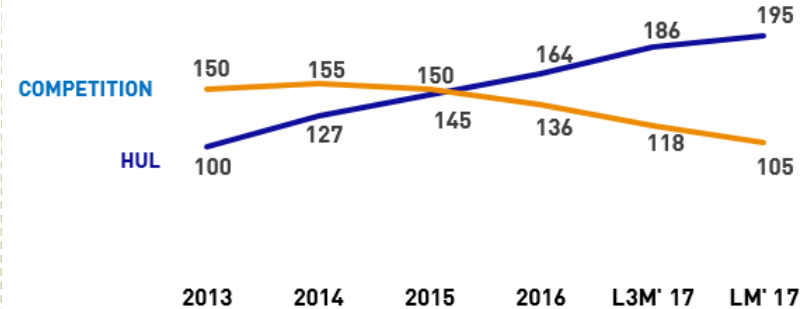
KEY HIGHLIGHTS

Decisive Leadership in Coffee MAT Market Shares



...and in Green Tea

Decisive Market Share Leadership



Brooke Bond: the most awarded Indian Brand



Beating Demonetization: 8% USG in DQ



THE OPPORTUNITIES

40% of tea in India is still sold loose



Only 1% of tea in India is sold in tea bags



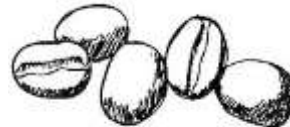
Value added teas – Green and flavoured are exploding



Coffee penetration in India is at 20%



....3/4th of which is in conventional coffee



Ice Cream consumption is 300 ml per capita



OUR STRATEGY



THE STRATEGY

Core



Win in the core

Market development



Create high margin new categories

Accessibility



Allow Consumers to access big brands

STRATEGY: CORE

Win in the core



Better Products



Tailor made tea blends
to suit region specific
tastes



Brand Love



Building emotional
connect with our
brands



STRATEGY: MARKET DEVELOPMENT

Create high margin new categories



Insightful
communication



New ideas



Sampling



STRATEGY: ACCESSIBILITY

Allow Consumers to access
big brands



Access Packs



Distribution



+



IN SUMMARY

Core



Win in the core

Market development



Create high margin new categories

Accessibility



Allow Consumers to access big brands

India's first transgender band
invites you to...

Aao Bajao Taali!



THANK YOU

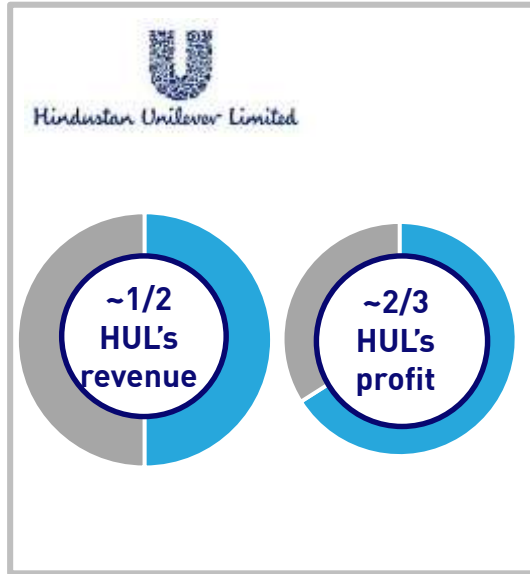


PERSONAL CARE

Sandeep Kohli

INTRODUCING PERSONAL CARE

Largest Personal Care business in India



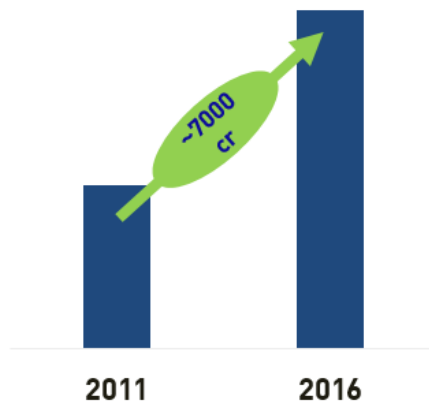
Iconic brands leading category positions



CONSISTENT TRACK RECORD

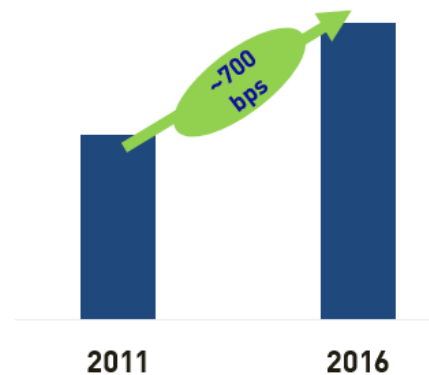
Growing the Market +Competitive Growth

Revenue



Profitable Growth

Operating Margin



HEADROOM FOR GROWTH ACROSS CATEGORIES & SEGMENTS

CONSUMPTION

Personal Wash

1.6x

Face Creams

2.7x

Shampoo

2.6x

Deodorants

4X

Toothpastes

2x

PENETRATION

Body Wash

Hand Wash

Hair Conditioner

Anti Perspirants

Categories with low
single digit penetrations

GROWING THE MARKET

More Users



Penetration

More Usage



Consumption

More Benefits



Premiumization

OUR STRATEGY



MISSION

INSPIRE A BILLION INDIANS TO TAKE MORE
CARE OF THEIR PERSONAL CARE

KEY THRUSTS

Make Core Brands Aspirational



Accelerate Premiumization & Market Development



Build a Naturals portfolio based on expertise & efficacy



Enter Emerging Segments : Baby



Winning in E-Commerce & Digital



MAKING CORE BRANDS ASPIRATIONAL

LUX

Reviving the Heritage of Bollywood



Premiumisation



New Formats



#1 Beauty Soap in India for the last 90 years

MAKING CORE BRANDS ASPIRATIONAL

BUILDING ASPIRATIONS IN EACH CATEGORY WITHIN THE PORTFOLIO

Hair Care



Skin Care - Face



Skin Care – Hand & Body



Skin Cleansing



Oral Care



Deodorants



ACCELERATE PREMIUMIZATION & MARKET DEVELOPMENT

HAIR CARE

Portfolio based on consumer needs

5 sharply defined brands



Premiumising the category by Higher order benefits



Building New Regimen



Only player adding penetration and growth



Dove Mirror

ACCELERATE PREMIUMIZATION & MARKET DEVELOPMENT

SKIN CARE

Building Premium Brands



New Benefits & Sensorial



Leading Trends



HUL has ~40% of the overall Premium Skin Lightening market

ACCELERATE PREMIUMIZATION & MARKET DEVELOPMENT

PREMIUMIZING THROUGH TREND SETTING INNOVATIONS: LAKME

First Argan Oil Infused lip care in India



Weightless Mousse



Lakme is India's No. 1 Makeup Brand

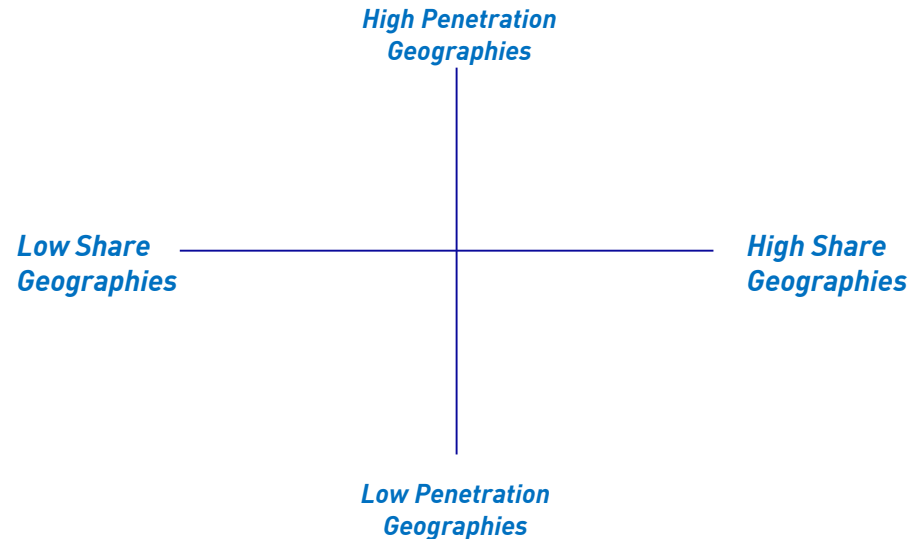


Lakme Argon Oil

ACCELERATE PREMIUMIZATION & MARKET DEVELOPMENT DEPLOYMENT THROUGH THE WIMI LENS



Cluster based jobs & marketing campaigns



ACCELERATE PREMIUMIZATION & MARKET DEVELOPMENT

A CLEAR MODEL OF DEPLOYMENT, FOCUSED ON SAMPLING

Sampling a key mechanism of driving trials



E-COM PACK WITH EDUCATION,
AND TARGETING
[BASED ON PIN CODES]



CHILD PACK WITH
EDUCATION



HANDWASH MINI-CARTON
WITH EDUCATION



H2H ON POND'S BB



CONTEXTUAL SMS
TARGETING ON POLLUTION –
PURE WHITE FC



JACKET SAMPLING FOR LARGE
CHILD PACKS

70 Mn Samples across various mediums

BUILDING A NATURALS PORTFOLIO BASED ON EXPERTISE & EFFICACY

Within existing brands



Building master brands



Building specialist brands



ENTERING EMERGING SEGMENTS: BABY

BABY DOVE LAUNCHED IN SELECT MARKETS



WINNING IN E-COMMERCE & DIGITAL

Replicating Perfect Stores online



Declutter Front of Pack and Zoom In

On Pack Messaging Hierarchy



1. Brand Lock Up
2. Range Name
3. Subrange
4. Variant Name & Illustration
5. Product Name
6. Product Benefit
7. Product Claim
8. Size (not visible on back)

eCommerce 4 messages ONLY



1. Brand Lock Up
2. Format
3. Variant / Benefit
4. Size

JBPs with Leading Players

NYKAA



big basket

5th largest Personal Care E-commerce business for Unilever globally

WINNING IN E-COMMERCE & DIGITAL LEADING IN MARKETING IN A DIGITAL WORLD WITH MEASURABLE METRICS

Thumb stopping creatives for Social media & mobile



Preferred destination for content

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



Become the 2nd largest beauty portal in India

9 Million visits and 12 Million queries answered in the past year alone on BeBeautiful



Be Beautiful

KEY THRUSTS



Make Core Iconic Brands Aspirational

Accelerate Premiumisation and Market Development

Build a Naturals portfolio on Expertise and Efficacy

Enter Emerging Segments : Baby

Winning in E-Commerce and Digital



PERSONAL CARE

Sandeep Kohli



FOODS

Geetu Verma

STRONG TRACK RECORD

Reaching critical Scale



Turnover ~1000 cr.

Leadership in core categories



KETCHUP



JAM



SOUPS

#1

With double digit growth over past 5 years

BRANDS HAVE STRENGTHENED



Brand Equity Score	↔	Increased by avg. 900 bps	↔
Increase in BMI	↔	Increased by avg. 330 bps	↔
Internal Distribution	↔	Average double digit increase	↔

2016: A MODEST PERFORMANCE

1

Challenging External Factors

Bread Scare Impacts Jam



Noodle FSSAI Issue



Drought & Demonetization



2

Fine Tuning Innovations Knorr Masalas



Mix fine tuned & relaunched in Maharashtra



Continue to drive Trials

OUR STRATEGY



STRATEGY

1. Strengthening the Core

Jam Penetration (Urban HHs)



Ketchup Pen - MH (All Urban HH)



2. Driving Innovations



Convenience cooking & eating



International cuisines



Health & wellness

Significant growth opportunity

STRENGTHENING THE CORE

A SCIENTIFIC & DISCIPLINED MARKET DEVELOPMENT MODEL

1 Accelerating Core



2 Building 360 Salience



4 Driving Product Experience



3 Driving Access Packs



ACCELERATING THE CORE

CREATING RELEVANCE



60% of Jam consumed with bread, thus building the Breakfast Moment



Increasing relevance of Soups in peak season

BUILDING 360 SALIENCE

RANGING ACROSS ALL POSSIBLE TOUCH POINTS

Winning Proposition



Harnessing Non TV



Partnerships Popular Culture



Build Brand Love



DRIVING ACCESS PACKS

ACCELERATING GROWTH BY INCREASING PENETRATION



**CAGR – 30% to 100%
(2012-2016)**

**And improved
category penetration**

DRIVING PRODUCT EXPERIENCE

SAMPLING AT SCALE

Food Ambassadors



~20% Increase Over FY'16

Dry Sampling



~Doubled Over FY'16

Partnering to sample



Building Consumer Relevance

DRIVING PRODUCT EXPERIENCE

THE ADDA MODEL



- “EXPERIENCE” model in Foods and Beverages- franchisee model
- Specifically targeting “snacking” moments
- Over 100 + locations
- 3 Lakh+ consumers interact with HUL brands everyday

DRIVING PRODUCT EXPERIENCE

PREMIUMIZING

International Soups



Premium Jams



Exciting Variants





THANK YOU

THANK YOU

For More Information

VISIT OUR WEBSITE

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

HUL Annual Investor Meet 2017

HUL's Annual Investor Meet 2017 will be held on 2nd June 2017, Friday, at the HUL Head Office in Mumbai.

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App Store

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Google play

CO-CREATING BUSINESS COMPETITIVENESS

ANNUAL INVESTOR MEET | 2 JUNE 2017

Pradeep Banerjee



Hindustan Unilever Limited

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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

Strategy

Execution

Capabilities



OUR NETWORK

Total ~ 4500 SKU's ACROSS 12 CATEGORIES

Suppliers	900	Factories	Over 30	SC People	12000	Warehouses	40	Customers	3800
Unique RPM	1200	Co Packers	60	Daily Trucks	8000	Million Tons	3	Billion units	38



Integrated Planning



IT Systems & Processes

- MRP
- Centralizing contract management

- Centralized Quality Incident Management
- Paperless Factories

- Inventory Management
- No-touch Prod Plan

- Depots/HUBs

- Transport Management
- GPS tracking

- Continuous Replenishment
- EDI/VMI
- CRM/ Process robotics

END TO END - IT ENABLED

SUPPLY CHAIN STRATEGY



OPERATING WITH PURPOSE



RESHAPING ASSET & COST BASE



AGILITY FOR A CHANGING MARKET



DIGITAL SUPPLY CHAIN



PARTNERSHIPS



TALENT & CAPABILITIES

EVERYDAY BRILLIANT EXECUTION

 **ONE VOICE** - OUR CULTURE

COMPETITIVE ADVANTAGE

Distributed Manufacturing



Responsiveness and Flexibility

IT



Dynamic real time replenishment

Scale



Procurement, Manufacturing, & Distribution

Partnerships



Supplier and service providers network

Talent Powerhouse

AGENDA

Strategy

Execution

Capabilities

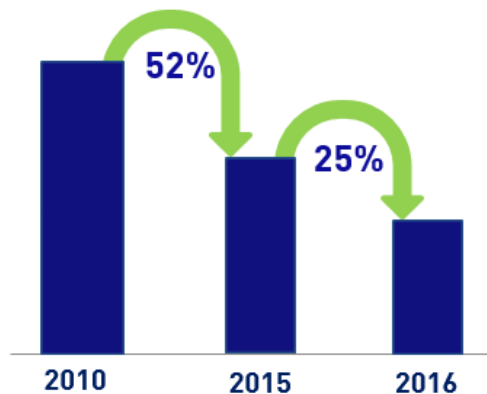


BRILLIANT EXECUTION

Safety	Frequency Rate (Reduction)	25% ▼	<ul style="list-style-type: none">• BeSAFE Program• Visible leadership
Quality	Defect per Million Units (Reduction)	38% ▼	<ul style="list-style-type: none">• End to End Quality Focus• Quality Deep Dives
Service	Cases fill on time (BPS)	+180 ▲	<ul style="list-style-type: none">• Service focus to point of purchase• Responsiveness and agility
Inventory (Days on hand)	MAT DOH (Days Reduction)	6% ▼	<ul style="list-style-type: none">• Robust S&OP process• Optimised manufacturing network
Savings	Savings % of Spends (Increase)	25% ▲	<ul style="list-style-type: none">• Symphony• World Class Manufacturing
Employee Relations	Man Days Lost	ZERO	<ul style="list-style-type: none">• Industrial Strategy Upskilling & Multiskilling• Employee at the center

SAFETY

Accident Frequency Rate*



* Total Recordable Frequency Rate
Across entire organization

Enablers

Behavioural Safety



- Top Management commitment & visible leadership
- BeSAFE Initiative across all Units

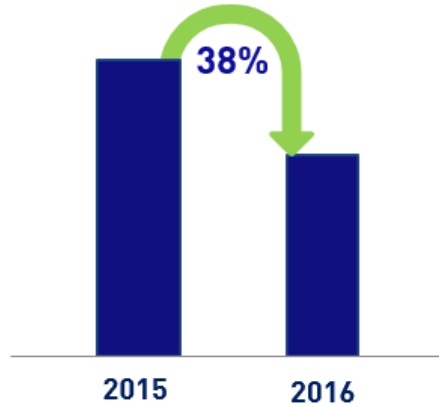
World Class Manufacturing



- Risk assessment tool
- Blue Collar programs for Risk elimination

QUALITY

Defect per Million Units*



* Consumer Relevant Quality Standards

Enablers

Consumer Focus



- Q in Design Phase
- Q @ Point of Sale
- Q in End to End SC

Brilliant Quality Fundamentals



- Zero Defects
- Leverage IT
- Supplier Quality

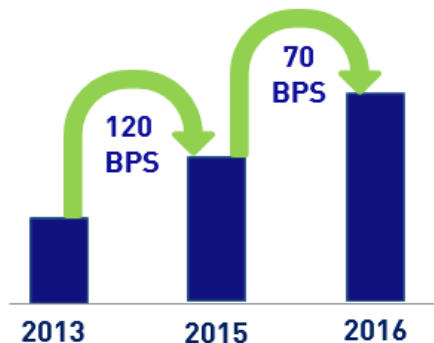
Culture & People



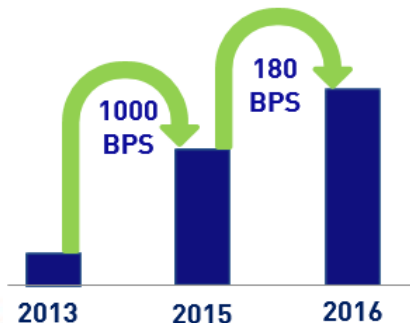
- Q mindset in last mile
- Distributor → Retail
- Grass root initiatives

SERVICE

Distributor



Retail



Enablers

Deliver on Mix



- More stores – better served
- Focus packs get disproportionate attention

Outlet level focus



- Loss Analysis at Customer level
- Focus on customer – outlet delivery gaps

Every day focus

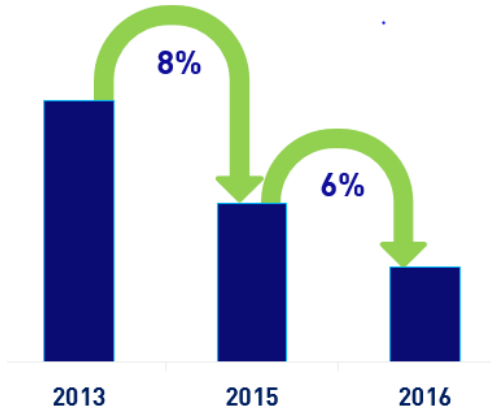


- Leading indicators
- IT enabled replenishment

Focus @ “Point of Purchase”

INVENTORY

Inventory (Days Reduction)



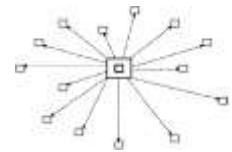
Enablers

Robust S&OP



Rigorous & sharper process

Optimized Networks



Multi – format Factories

Benchmarking



Analyzing cycle, safety & Transit inventory

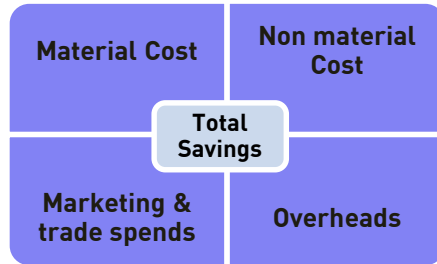
Analytics



Structural shifts

SAVINGS

End to End Value Chain

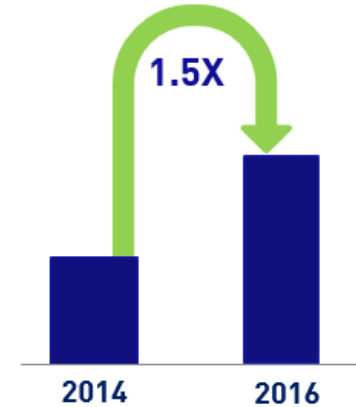


Leveraging ZBB framework



Galvanizing the entire
organisation

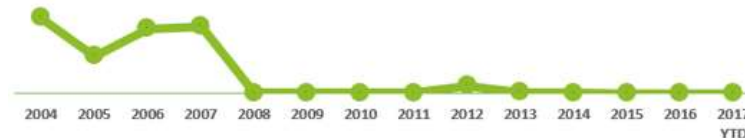
Stepped up savings



NURTURING RELATIONS



Zero Man-days lost with 12000 Blue Collar employees in the last 3 years



AGENDA

Strategy

Execution

Capabilities



FUTURE READY SUPPLY CHAIN

Segmentation



**Differentiated
Strategy**

World Class Manufacturing



**Process driven
improvements**

Logistics Excellence



**Optimized end
to end**

Integrated Planning



**Analytics and
Process
Automation**

Emerging Segments & Channels



**Being Future
ready to serve
business**

Sustainability



**Unilever
Sustainable
Living Plan**

Talent Powerhouse

SEGMENTATION

Category



De-average SC

Channel



Differential Channel & Customer offerings

Geography



E2E Network Design, WIMI

SEGMENTATION

AGILE SUPPLY CHAIN

OPPORTUNITY



Lakme

Business Need : Range availability

SC Challenge : Low volume , Difficult to forecast

METHODOLOGY



RESULTS (2 Years)

Service



+320
BPS

FG DOH Redn



22%

Business Waste Redn



32%

SEGMENTATION

LEAN SUPPLY CHAIN

OPPORTUNITY



Laundry

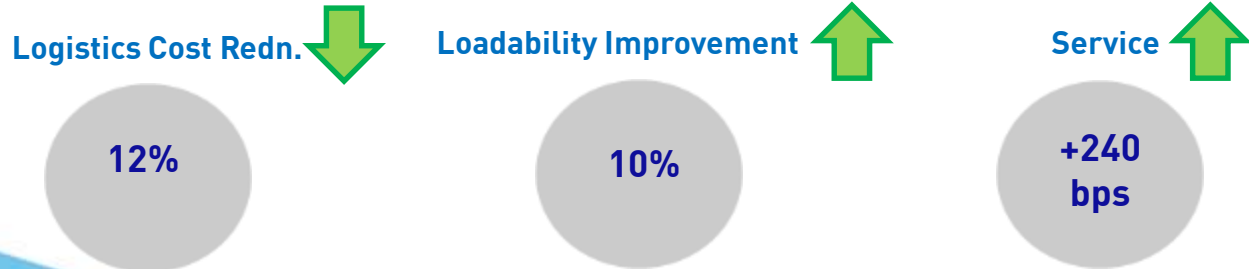
Business Need : Reduce Distribution Cost

SC Challenge : High volume, source plan adherence

METHODOLOGY



RESULTS (2 Years)



SEGMENTATION

WINNING IN MANY INDIAS



Cluster based Planning & Execution

Differential SC response

GEOGRAPHY

FORMULATION	Enzymatic	ACTIVATION			Rs. 11 off		Rs. 2 off
	Non Enzymatic				Plain Stock		Rs. 4 off

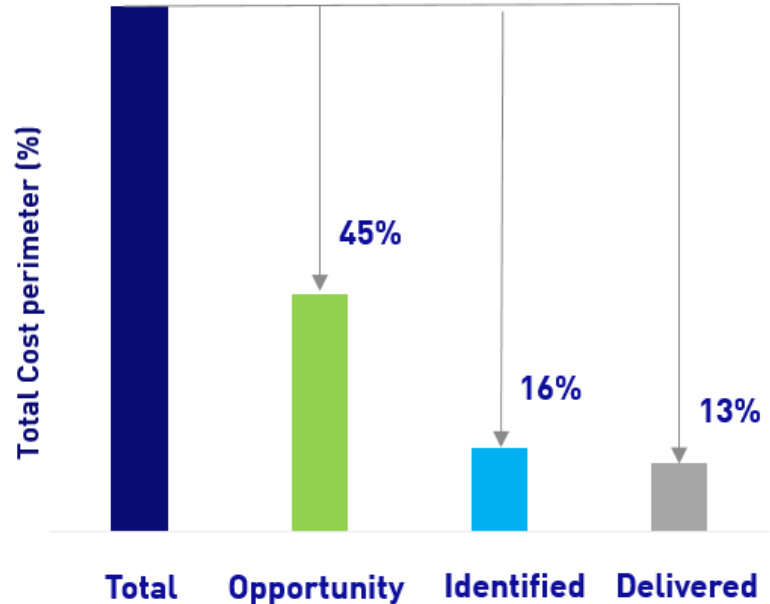
CHANNEL

ACTIVATION	GT		Container Offer		Plain Stock
			4+1 RTD		Tiffin Box CP
	CSD		Plain Stock		Scrubber CP

WORLD CLASS MANUFACTURING

Savings

- Cost Deployment across the manufacturing process
- Eliminate Waste / Non Value Added Activity
- Improve Machine Productivity (OEE)
- Minimize material handling
- 10% Cost Perimeter reduction YoY



LOGISTICS EXCELLENCE

Buy Smart



- Price Discovery
- Target Costing
- Fuel De-coupling

Operate Efficiently



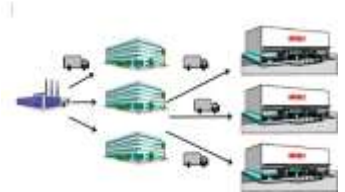
- Cost to Serve
- Manpower Rationalization
- Optimizer

Load Better



- Design to Distribute
- Right Truck Type

Travel Less



- Network Optimization
- Direct Despatch Maximization

Ultra Logistics

INTEGRATED PLANNING

Collaborative Planning



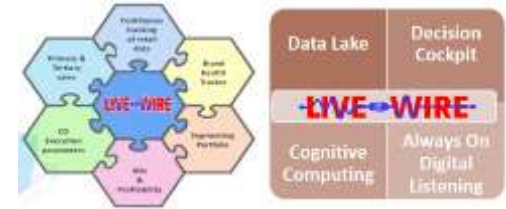
- Business Modelling
- Baselines, Promo Planning

Execution Focus



- Predictive Service Analytics
- Everyday Great Execution (Edge) Scorecard

Performance Management



- Inventory analytics
- Release operational time

Democratize Data : Faster Decision Making

EMERGING SEGMENTS & CHANNELS

Categories



- Capability for naturals... end to end
- Build partnerships

Channels



- SC design
- E-com specific capabilities
(E.g. packaging)

SUSTAINABILITY

Sourcing



- Higher yields – 25 to 40 MT/Acre
- 100% under drip irrigation
- 20% less Water & chemicals used

Enhanced farmer incomes

Energy*



Renewable
Energy



Water
Usage/T



CO2 from
Energy/T

- Solar and wind energy
- Water conservation plans
- Biomass fuel

Environment friendly use of
resources

Community engagement



- Swach Doot – Shop floor employees as ambassadors

Direct Beneficiaries : 6.8L

TALENT POWERHOUSE

Individual Focus



Training Hrs:
~65000

Unleash Potential



Winning Balance:
20%

SC Leadership Forum



No of Projects:
500+

THANK YOU

For More Information

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

HUL Annual Investor Meet 2017

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