Personal Care INDIA

Introducing Personal Care - India

1/2 of HUL's revenue

Personal Care

~ INR 150 bln
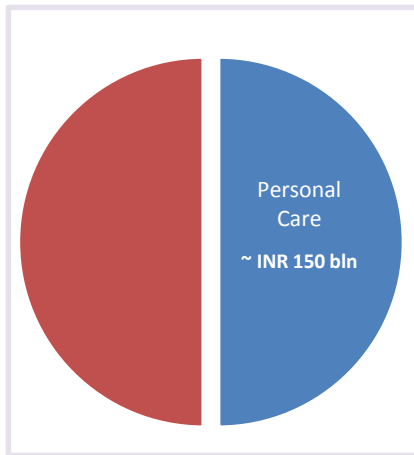
2nd largest PC business in Unilever

2/3 of HUL's profit

Personal Care

~ INR 38 bln
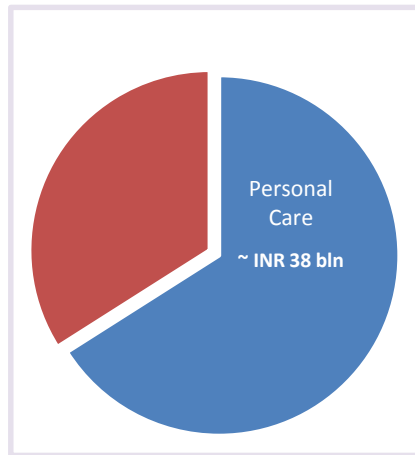
Operating margins ~ 25%

Fast growing

CAGR > 10%

2010   2015
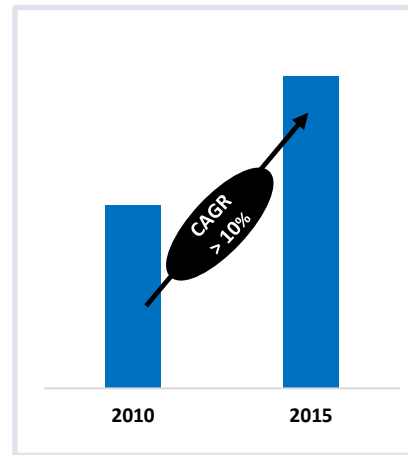
Added > INR 6000 Crore in 5 years

Leading brand positions

#1   #1   #1   #2   #1

PW   SKIN CARE   HAIR CARE   ORAL CARE   MAKE UP
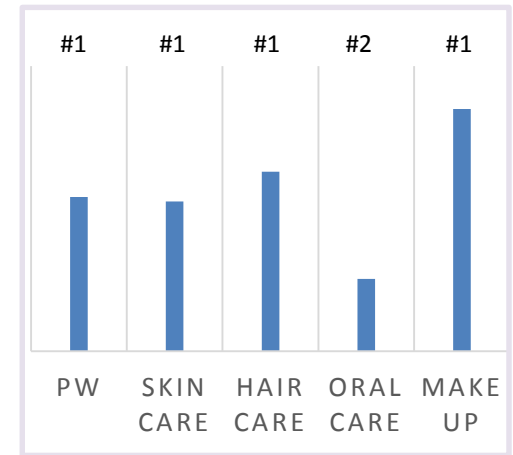
Market leader across categories

With Six iconic 1000 crore brands
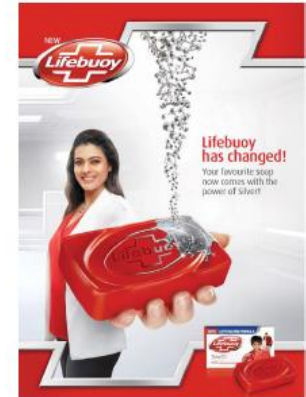
Our Vision

Continue to grow ahead of the market across PC categories

Become the Wikipedia of Personal Care in India

Key thrusts for Personal Care

Make Core Aspirational

Lead Market Premiumisation

Make Core Aspirational

More and bigger innovations on core brands

Build consistent engagement platforms rooted in brand mission & functional promise

Core of the Core

More and bigger innovations on core brands

BB cream

Biggest BB cream in the market within a year of launch

Ayurvedic Care

Participating in the growing naturals market

Powder Cream

New sensorial that delivers long lasting fairness

Engagement platforms rooted in Brand Mission & Functional Promise

JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC
Winter		Hand Foot Mouth	Summer		Summer/Back to School		Monsoon		Pink Eye	Winter	

Close Up Engagement Platform- First Move

2015 : Launch of First Move
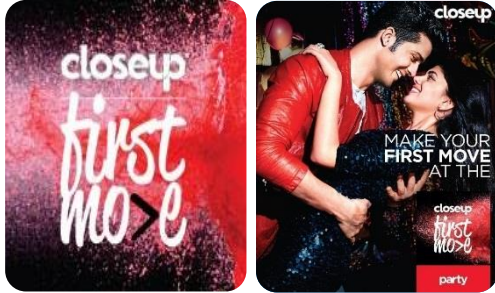
Penetration All India	21.7	⬆
Penetration LSM 7+	18.7	⬆

First Move integrated Promotion plan

High Brand Engagement

Brand Awareness	Up 30%	⬆
Social Engagement	Up 15x	⬆
Brand Conviction	Up 600 BPS	⬆

Leveraging WIMI – to drive Core of the Core across Rural Markets

Selection of key SCRs that contribute to over half of the sachet business

East Haryana

Maru Pradesh

Oudh

Jaipur

Braj

Bhojpu

Maithila

Malwa

Jhar Hills & Plains

Bhillistan

Chattis

Coastal Orissa

Kokan

Desh/Khandesh

Gondwana

Orissa Hills & Plateau

Marathwada

Telangana

Andhra

Kannad

Rayalseema

Old Mysore

Konganad
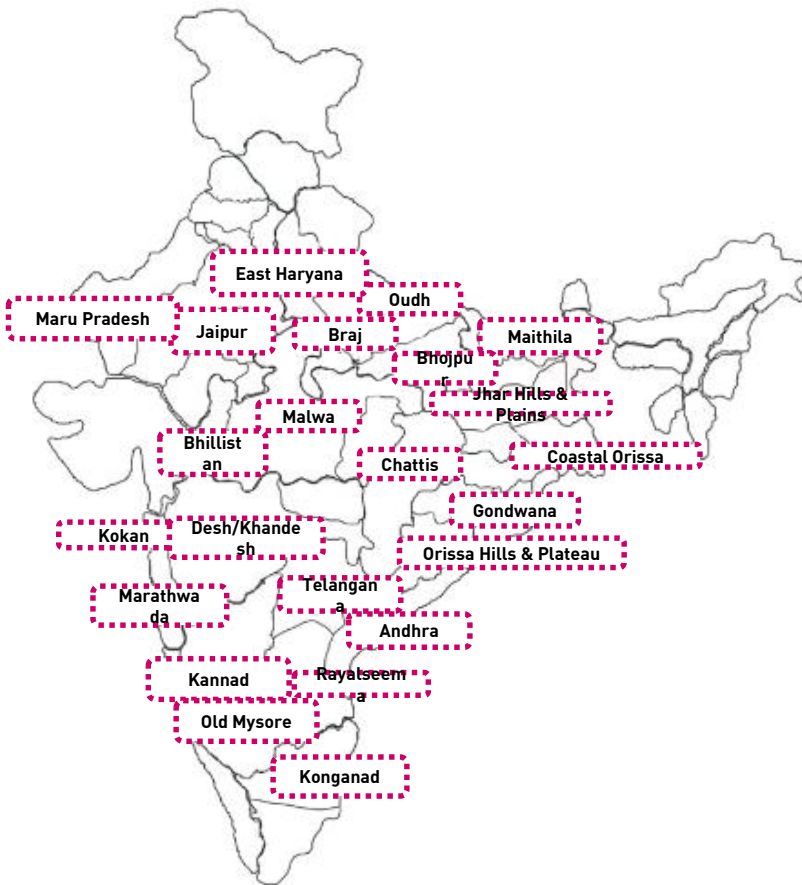
Locally relevant insights activated

Hindi heartland

WB & Maharashtra

Localised promotions (Central India+Mah)

Lead Market Premiumisation

Pioneering New trends

Turbo charge Market development by building new benefits

Lakmé: Pioneering new trends

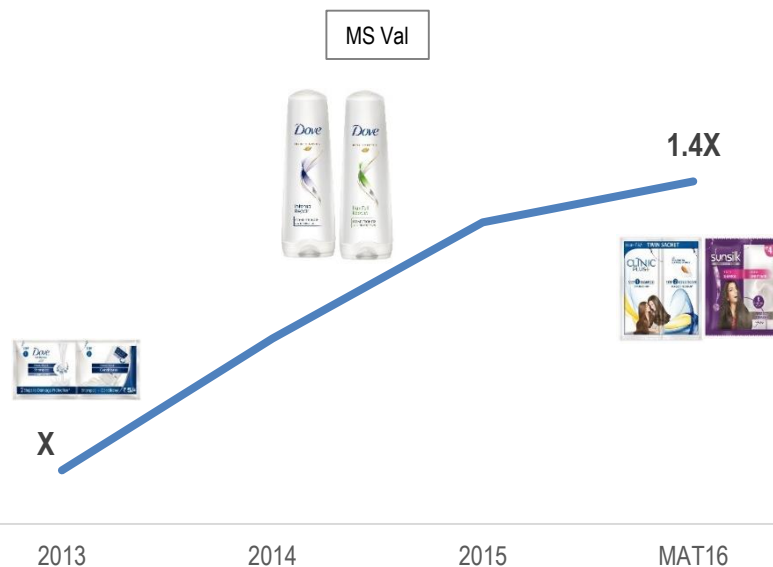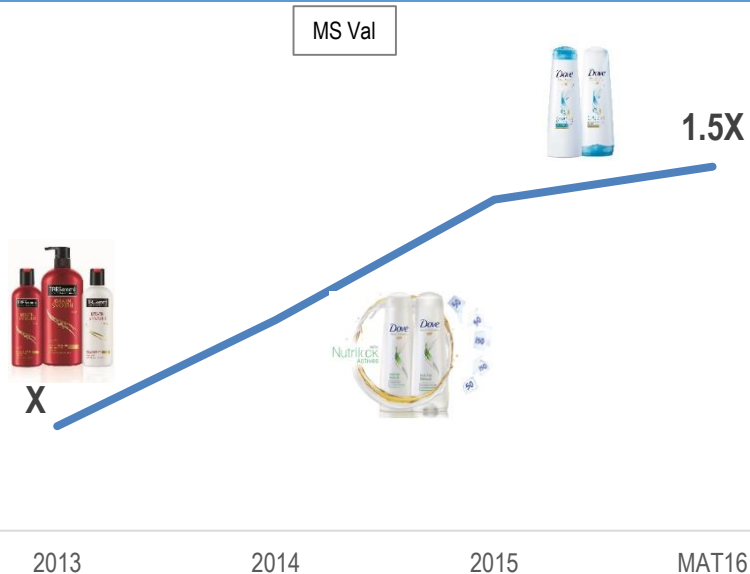| 2014: Gloss	2015: Sculpt	2016: Illuminate

Premium Skin Lightening: Pioneering BB/CC Cream as a trend

Dove & TRESemme: Premiumisation led by new benefits

Premium Shampoos (Dove & TRESemmé) winning with new benefits

MS Val

1.5X

X

2013 2014 2015 MAT16

Conditioners – Winning in the segments of future

MS Val

1.4X

X

2013 2014 2015 MAT16

| Dove Oxygen Moisture | TRESemmé Spa Rejuvenation | Clinic Plus Twin Sachet | SunsilkTwin Sachet |

Breathe life into dry, dull hair.
New Dove Oxygen Moisture

Spa Rejuvenation

Axe Signature: Premiumisation led by new benefits

MS Val (Men's Mkt) - Axe Signature

6.4

Q314 Q414 Q115 Q215 Q315 Q415 Q116
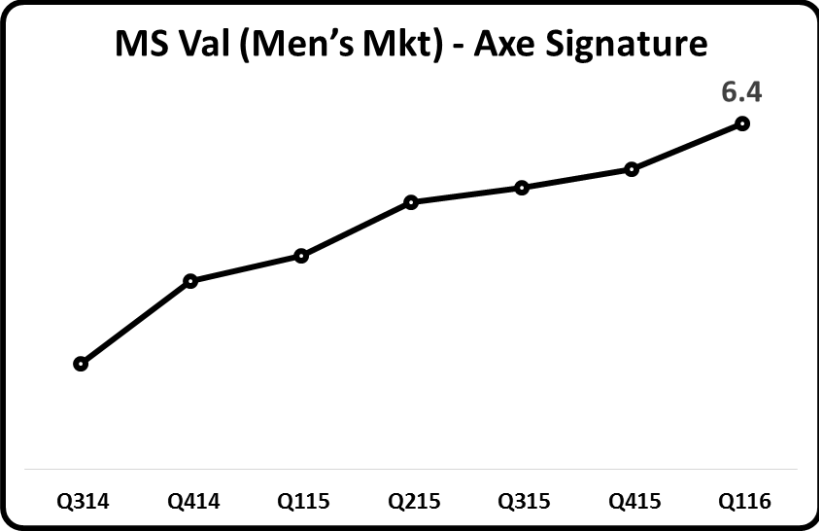
Biggest innovation in Personal Care in 2015

Lead Premiumisation in the emerging Naturals Segment

Within the existing portfolio

Extending our presence to new brands
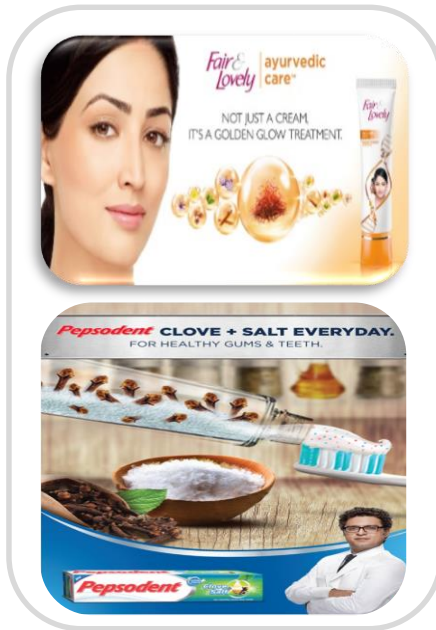
PC Enablers
Dialling up the BIG Q agenda

PC Enablers: Building the PC Gene

Craftsmanship	WIMI & MDM	Digital	Assortment & Drug	Financial Growth Model
1 Let people fly	**2** Build capabilities	**3** Win on Trends	**4** Win in channels	**5** Fuel for growth
The Pursuit of Perfection	Turbocharge Market Development	Digital	E Commerce	Strong savings program
Everyday Inspiration	Leverage WIMI	Engagement Platforms	Transform MT	Gross Margin

1

Craftsmanship

Leading Edge Technology to drive brand propositions at POS
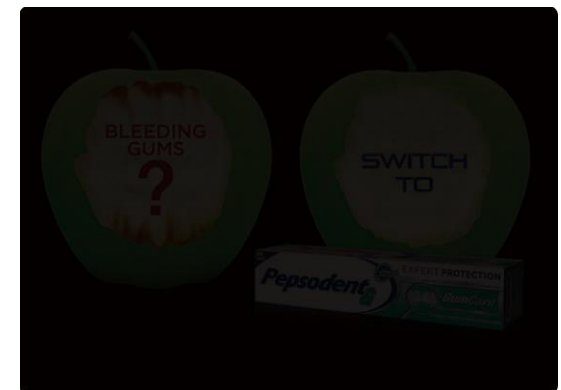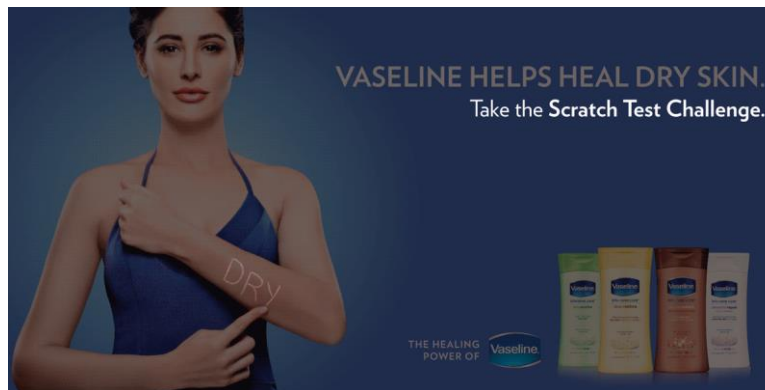
E-ink Parasite Hangers
Deployed across 25% of stores in Modern Trade

2

Turbocharge Market Development

One size does not fit all:
Clear approach based on degree of evolution of category

Seed

Accelerate

Explode

Accelerate GRPs

Launch Access Pack

Aided Sampling / Contact Programs

Build new benefits

Indict current habit

Unaided / Drop-Dead Sampling

Start expanding VWD using DLSG

Men's Face Care | Bodywash | Deos | Conditioners | Handwash | Dove Bar | Facial Cleansing | Premium Skin | Premium Shampoo
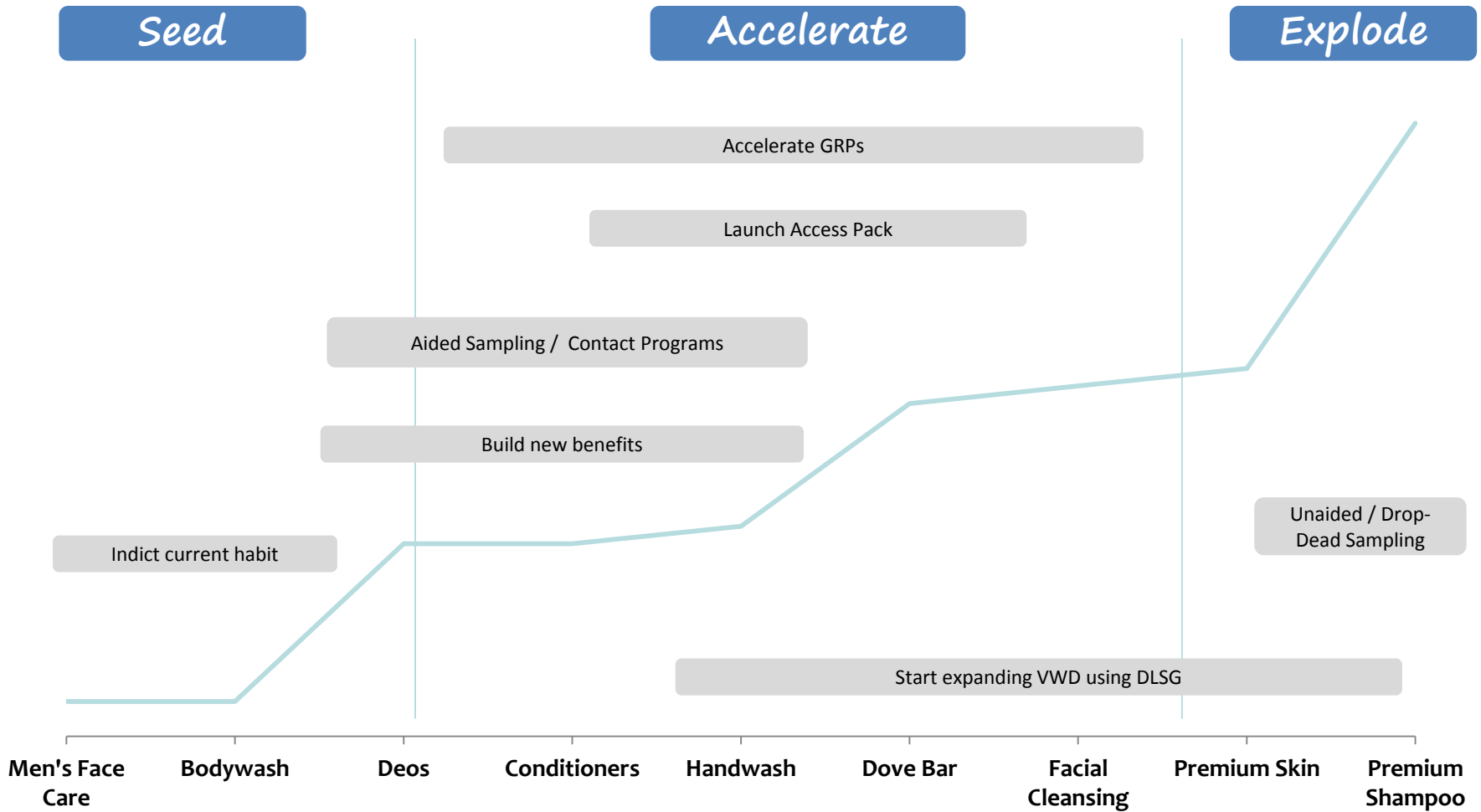
Sampling supported with education

POND'S BB

DOVE CONDITIONER

FAL FACE WASH

3

Digital

- Wikipedia of hair, Skin & Make-up

Wikipedia: All things hair, skin & make up

Google | be the wikipedia of beauty online

Search: The Bedrock

12M searches a month

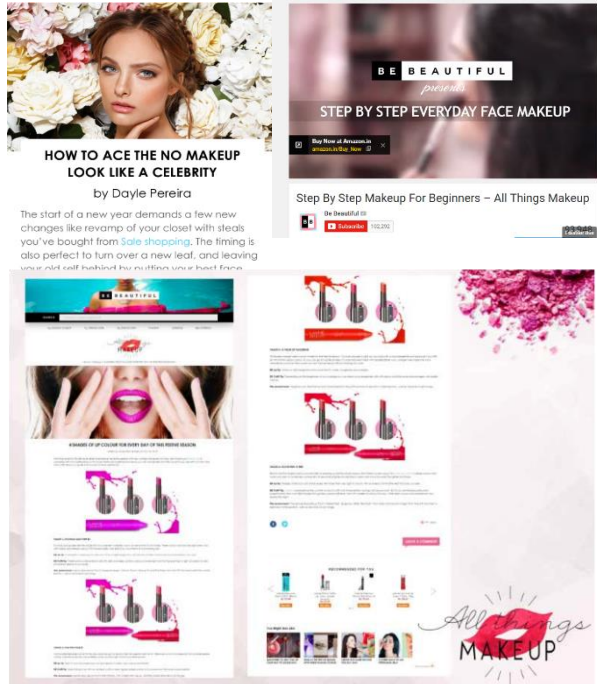**5M** unbranded searches
4.5M branded searches

2.5M
irrelevant searches
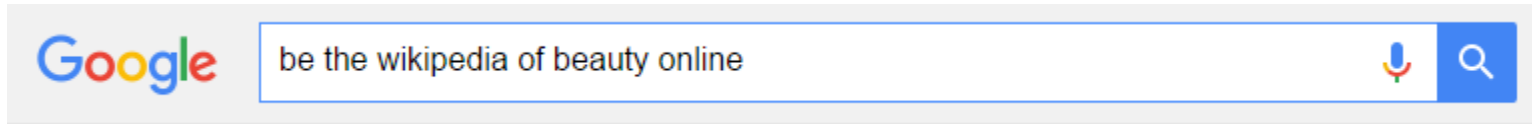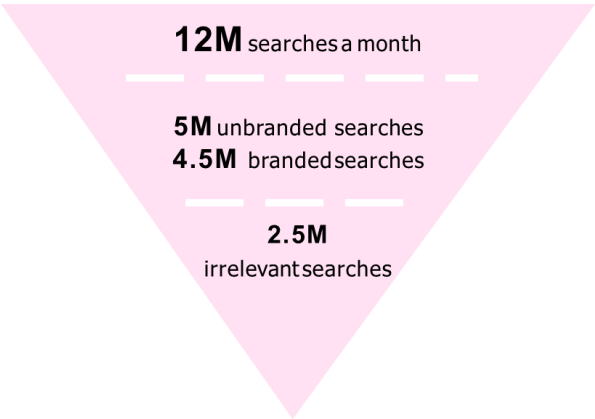
MICRO MOMENTS ON SEARCH

KNOW
How to's
Latest trends

DO
How to use
What to

GO
To a salon
Services

BUY
Products
Complete look

Relevant content

100+ videos

Encouraging Results

Be Beautiful: No.3 beauty portal in India

CTR: 2X of BM

CPC half of benchmark

Our Vision

Continue to grow ahead of the market across PC categories

Become the Wikipedia of Personal Care in India