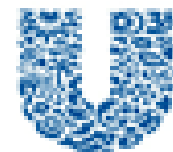
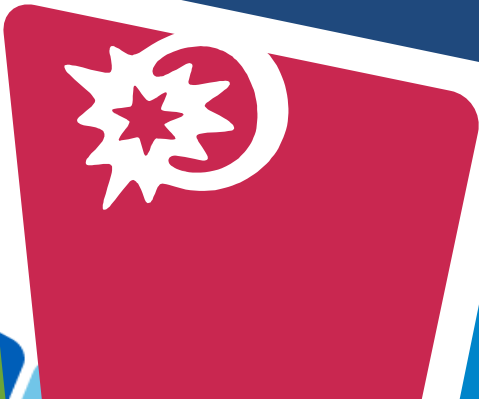


FOODS: WINNING DECISIVELY



Hindustan Unilever Limited

BUSINESS OVERVIEW- FOODS AND REFRESHMENT



SIZEABLE BUSINESS

PROFITABLE BUSINESS

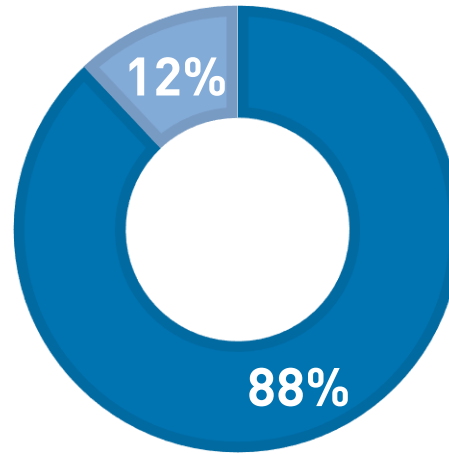


~ Rs. 5500 Cr

Size & Profitability: TOP 5

STRONG PLAYER

LEADER/CONTENDER

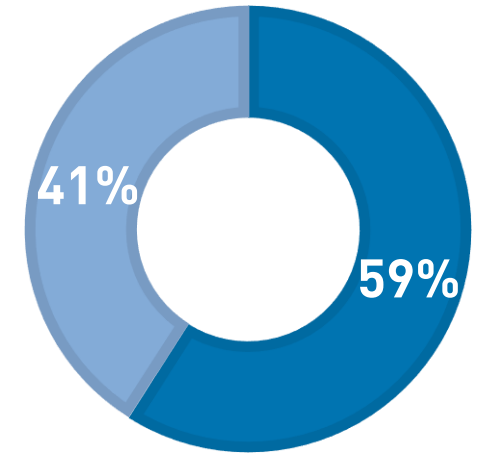


No.1 or 2

88% of business

GOOD MIX

SCALE Vs MD



59%: Scale

41%: Market Development

BROAD BASED DOUBLE DIGIT GROWTH



F&R

REFRESHMENTS

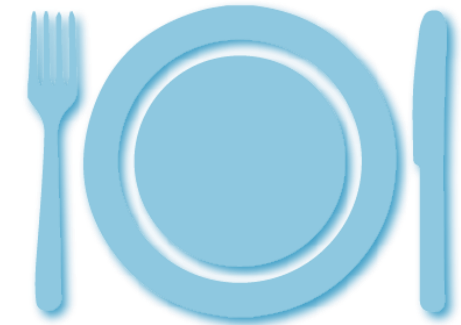
FOODS



>10% CAGR
(2013 - 16)*



>10% CAGR
(2013 - 16)*



>10% CAGR
(2013 - 16)*

** Financial Year*

New structure designed to accelerate growth for each category

FOODS VISION



“food that tastes good, does good and doesn’t cost the earth”

KNORR
IN
EVERY
KITCHEN



KISSAN
IN
EVERY
TIFFIN

CONSISTENT, COMPETITIVE & PROFITABLE GROWTH ON CORE



>15%
CAGR (2013-16)*

300bps
(SHARE GAIN)

1300bps
(GM IMPROVEMENT)



>10%
CAGR (2013-16)*

500bps
(SHARE GAIN)

450bps
(GM IMPROVEMENT)



>15%
CAGR (2013-16)*

800bps
(SHARE GAIN)



900bps
(GM IMPROVEMENT)

* Financial Year

MOST IMPORTANTLY, SUSTAINED GROWTH FROM NEW USERS



+200bps
DELHI

+300bps
MUMBAI



+300bps
MUMBAI

+300bps
PHH*



+400bps
DELHI

+450bps
PHH*

MAT May IMRB

*Punjab, Haryana and Hills

THE STARTING POINT OF THESE RESULTS



Unlocking RELEVANCE



Driving PENETRATION



THE STARTING POINT OF THESE RESULTS



Unlocking RELEVANCE



Driving PENETRATION



UNLOCKING RELEVANCE



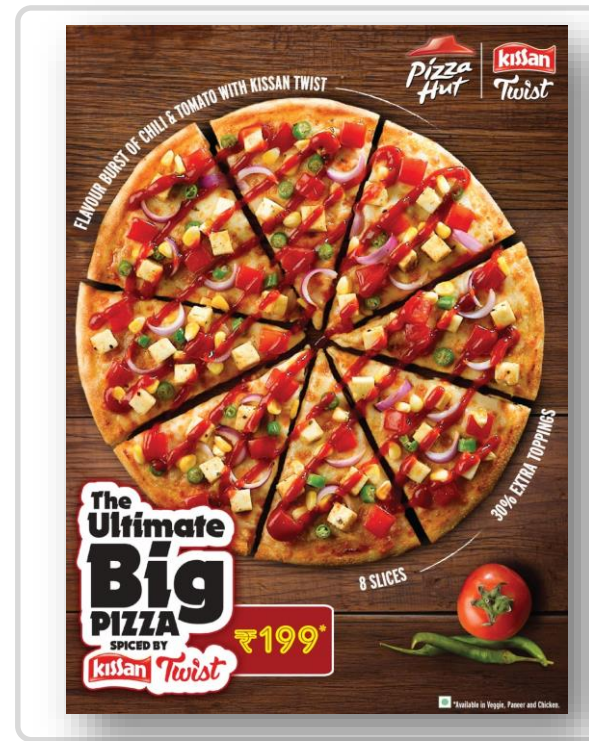
WINNING PROPOSITION



HARNESSING NON TV



PARTNERSHIPS POPULAR CULTURE



BUILD BRAND LOVE



UNLOCKING RELEVANCE



WINNING PROPOSITION



Knorr Soup
Chhoti bhook
15sec
Hindi
Manchow soup
05 11 14

UNLOCKING RELEVANCE



WINNING PROPOSITION



UNLOCKING RELEVANCE



LEVERAGING
OUTDOOR

PRINT
INNOVATION

MADE FOR
WEB CONTENT

HARNESSING
NON TV



UNLOCKING RELEVANCE



PARTNERSHIPS
POPULAR CULTURE



20 sec
26th May 2015

UNLOCKING RELEVANCE



PARTNERSHIPS POPULAR CULTURE



UCN : 66600601
BRAND : KNORR CUP A SOUP
TITLE : KCS SHAMITABH 25
DURATION : 25
LANGUAGE : HINDI

UNLOCKING RELEVANCE



BUILD BRAND LOVE



THE STARTING POINT OF THESE RESULTS



Unlocking RELEVANCE



Driving PENETRATION



DRIVING PENETRATION



ACCESSIBILITY



AVAILABILITY



SAMPLING



NEW OFFERINGS ON CORE



ACCESS PACKS ACROSS ALL CORE CATEGORIES



KETCHUP

JAMS

SOUPS

KEY ACTIONS



- LED COMMUNICATION WITH ACCESS PACKS
- USED FREQUENCY MEDIUMS TO REMIND REPEATEDLY
- "COST TOO MUCH" ATTRIBUTE SCORES MOVED DOWN

Access Packs grown at a CAGR of 40% over the last 3 years

DISTRIBUTION RAMP UP ACROSS ALL CORE CATEGORIES



KETCHUP



JAMS



SOUPS

Coverage of penetration packs > **DOUBLED** in last 3 years

SAMPLING SPEND DOUBLED IN LAST 3 YEARS



NEW USERS RECRUITED THROUGH STRENGTHENED PORTFOLIO



BLAST RANGE



MANGO JAM



TWIST



SOUPS



THE TRENDS WE SEE INFLUENCING OUR FUTURE...



BRAVE NEW WORLDS

GROWING EXPOSURE TO INTERNATIONAL CUISINES



OUT OF HOME TO IN HOME

EATING OUT IS IMPACTING IN- HOME COOKING



NATURAL AND PROVENANCE

CONSUMERS ARE INCREASINGLY SEEKING ASSURANCE AND MOVING TO TRUSTED CHOICES



NUTRITION AND WELLNESS

FORTIFICATION AND BETTER FOR YOU FOODS ARE ON THE RISE



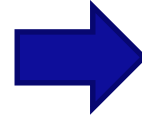
EVOLVING CONSUMERS

CHANGING TREND IN ASPIRATIONS, DRIVERS, MEDIA HABITS AND CONSUMPTION

TO SUM IT UP



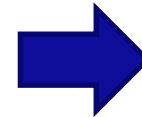
**ENTERED
NEW
SPACES**



**FUTURE
TRENDS**



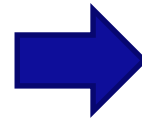
**ADJACENCIES
HAVE FIRED**



**HEADROOM TO
GROW
PENETRATION**



**CORE IS
SECURE**



THANK YOU

BON APETIT

