



Unilever

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BEAUTY &  
PERSONAL CARE

**ALAN JOPE**

PRESIDENT

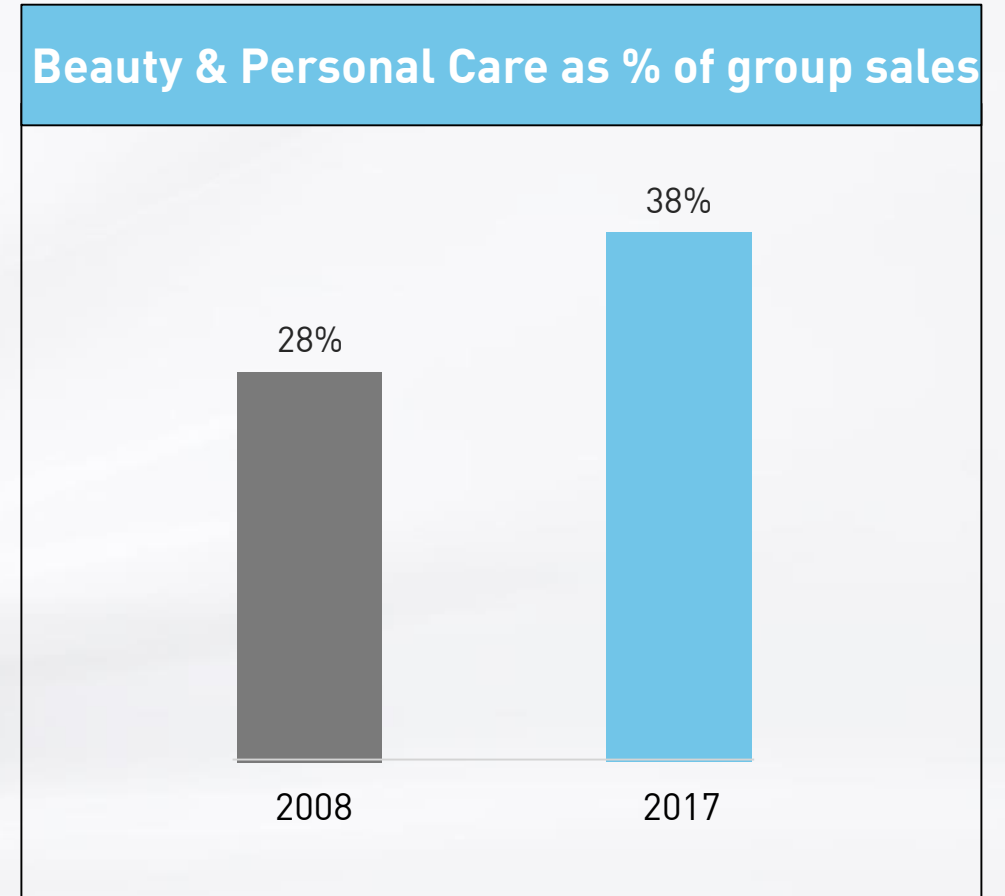
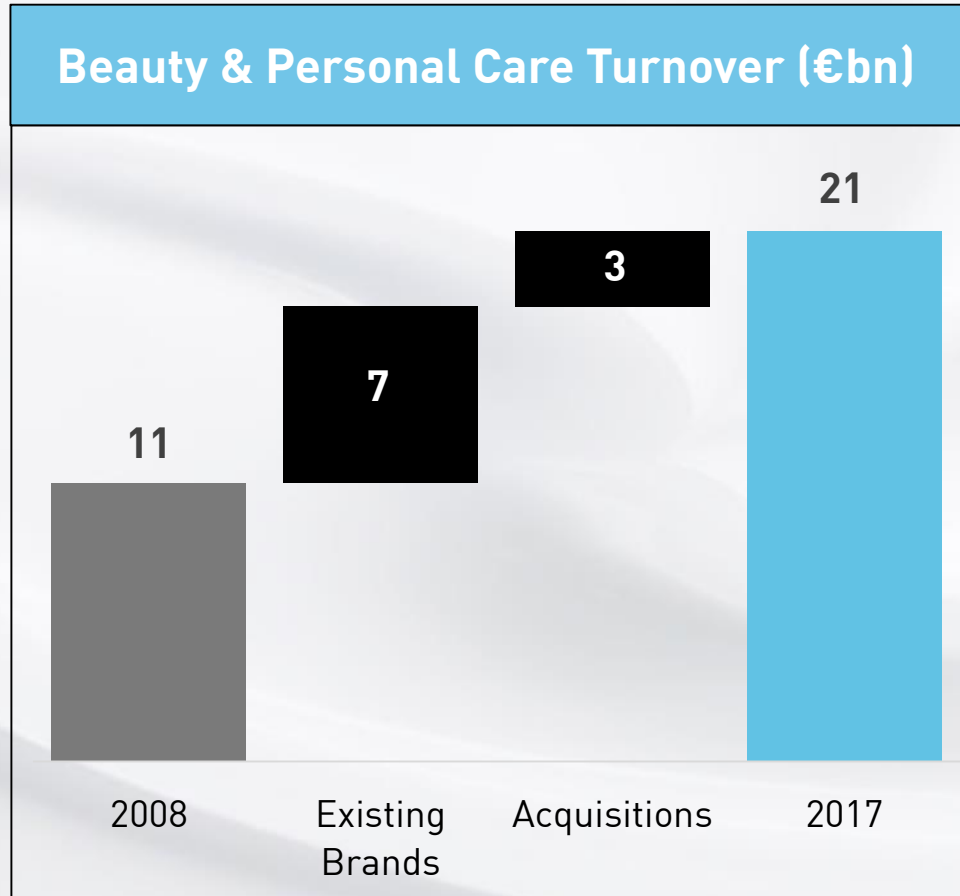
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**SANDEEP KOHLI**

VP SOUTH ASIA

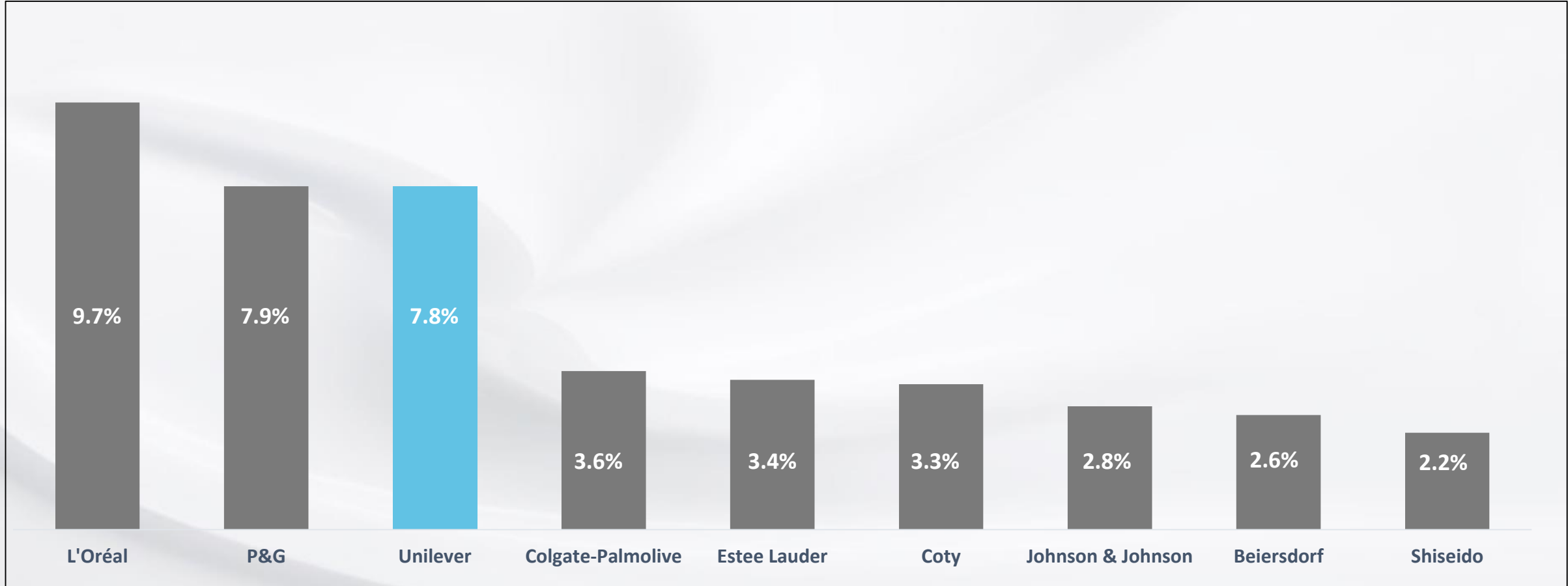
# UNILEVER BEAUTY AND PERSONAL CARE

€21bn business; a growing part of Unilever



# MAJOR PLAYERS IN THE MARKET

## Unilever, a top global player in Beauty and Personal Care



# UNILEVER BEAUTY AND PERSONAL CARE

Strong portfolio with leading positions



 Global leading positions  Local leading positions



# UNILEVER BEAUTY AND PERSONAL CARE

## Well positioned global brands and an attractive footprint

### Leading Global Brands



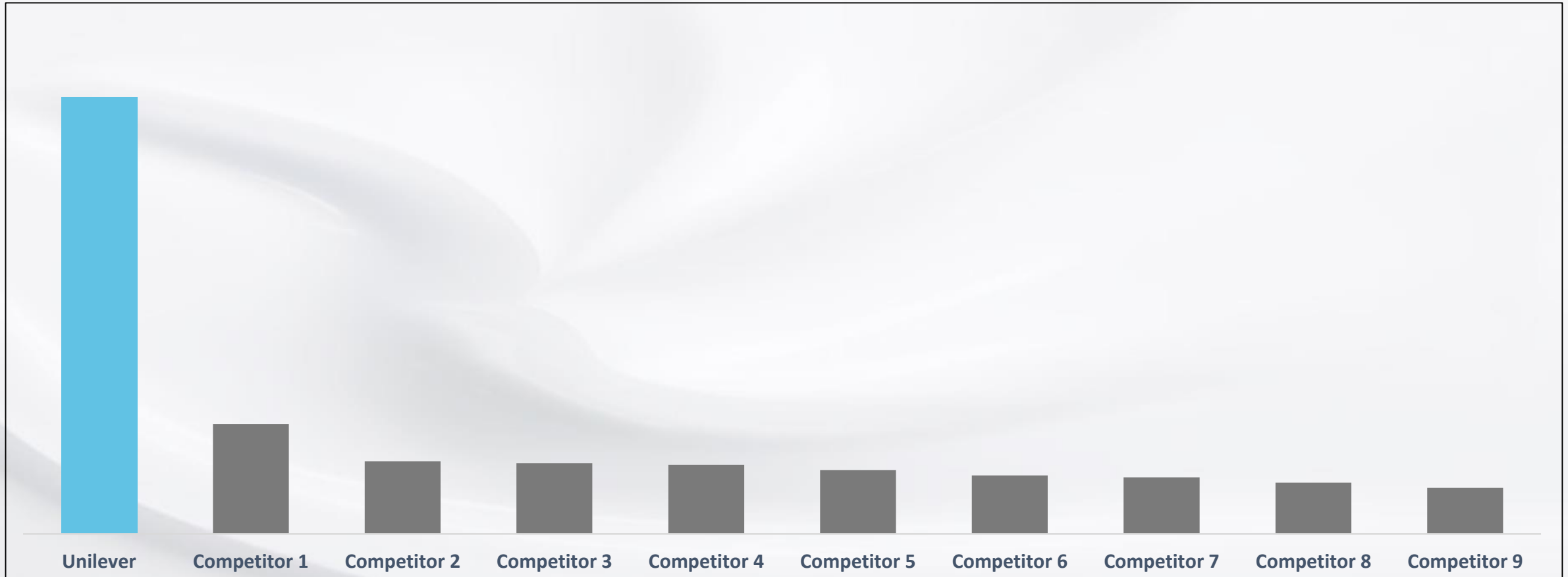
### Attractive Footprint: 64% Emerging Markets



# MAJOR PLAYERS IN INDIA MARKET



## Unilever India, leader in Beauty and Personal Care



# HUL BEAUTY AND PERSONAL CARE



Leading player in all key categories



#1

Skin  
Cleansing



#1

Skin Care



#1

Hair Care



#2

Oral Care



#3

Deodorants



#1

Make up





# WINNING IN MANY INDIAS

## Tailored portfolio covering all price tiers



1.5 ¢



€ 15



# BEAUTY & PERSONAL CARE GROWTH STRATEGY

## VISION

To be the most valuable and the most admired Beauty and Personal Care Business in the world.

## STRATEGIC CHOICES

### More From the Core

Core Benefits



Market Development



Superior Products



### Future Fit Portfolio

New & Acquired Brands



New Business Models



### High Growth Spaces

Prestige



E-Comm



H&B



Nascent Markets



## NEW MODEL OF MARKETING

Purpose and Sustainability



New Communications Model

Precision Marketing



FUEL FOR GROWTH (NRM, ZBB, 5S)



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# MORE FROM THE CORE

Our core brands and businesses remain our top strategic priority

## Purpose and Sustainability



Dove does not test on animals.  
Certified cruelty-free  
by PETA.

## Core on Trends



## Market Development





# MORE FROM THE CORE



Our core brands and businesses remain our top strategic priority

## Purpose and Sustainability

**Lifebuoy** **NEW**

**ARE FLU GERMS COMING IN THE WAY OF YOUR CHILD'S STUDIES?**  
Lifebuoy Activ Silver Formula

Our professional quality range is **INSPIRED BY NATURE.**  
It nourishes & replenishes hair for a healthy lustrous shine.

## Core on Trends

SALON STYLE HAIR AT HOME, EVERY DAY **TRESemmé** EXPERT SELECTION

**BRING OUT YOUR NATURAL SHINE**

**TRESemmé BOTANIQUE**  
WITH CAMELLIA AND OLIVE OIL

NO DYES OR PARABENS

Our professional quality range is **INSPIRED BY NATURE.**  
It nourishes & replenishes hair for a healthy lustrous shine.

## Market Development

**6x**  
LONGER LASTING  
MOISTURIZATION

**Vaseline**  
intensive care™  
deep restore

Clinically proven to restore



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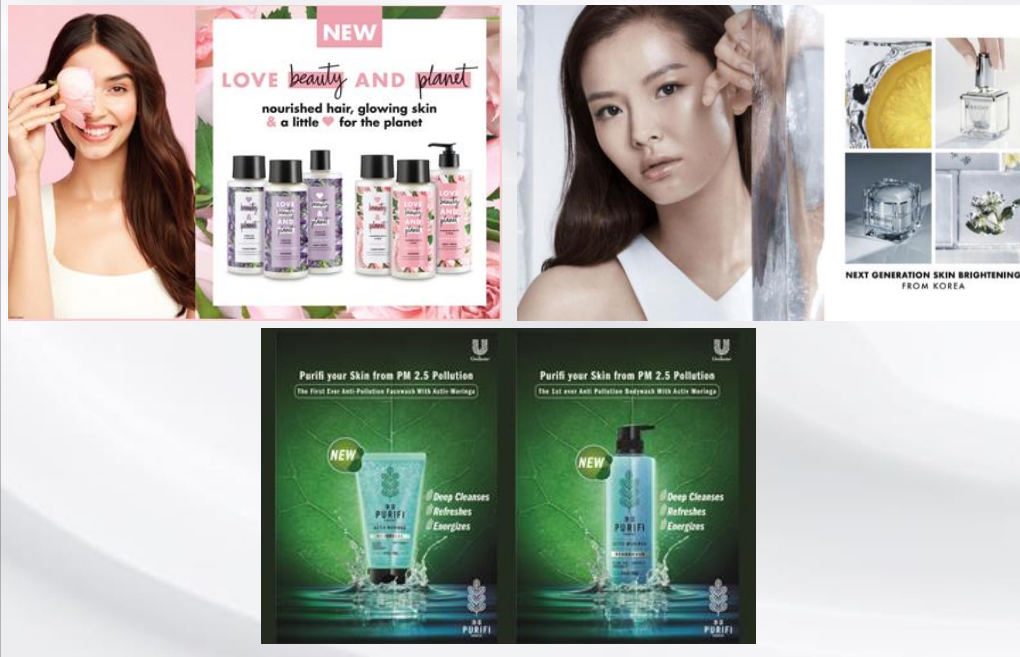
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# FUTURE FIT PORTFOLIO

## Portfolio transformation through new and acquired brands

10 new brands launched since 2017



13 companies acquired since 2015



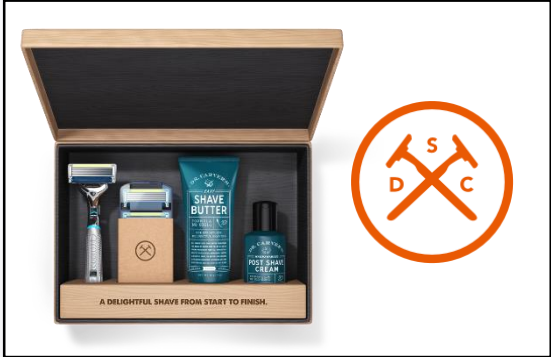





Oct YTD 2018  
**+11%**  
LFL growth



# FUTURE FIT PORTFOLIO

## Growth accretion through strategic acquisitions

				<p>OTHERS:</p>   
Consideration	~ €2bn	~ €2bn	~€1bn	~€1bn
OCT YTD LFL Growth%	11%	25%	10%	11%
Aggregate growth impact	>60 bps (OCT YTD)			





# FUTURE FIT PORTFOLIO

## Accelerated learning through strategic acquisitions

### Content Creation and Publishing



### Data Driven Marketing



### Trends and K-Beauty



# FUTURE FIT PORTFOLIO



## Portfolio transformation through new and acquired brands

### Acquired Ayurvedic Hair Treatment brand



### Launched an Ayurvedic Naturals Masterbrand





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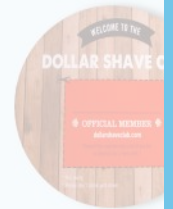


### Future Fit Portfolio

New & Acquired Brands



New Business Models



## High Growth Spaces

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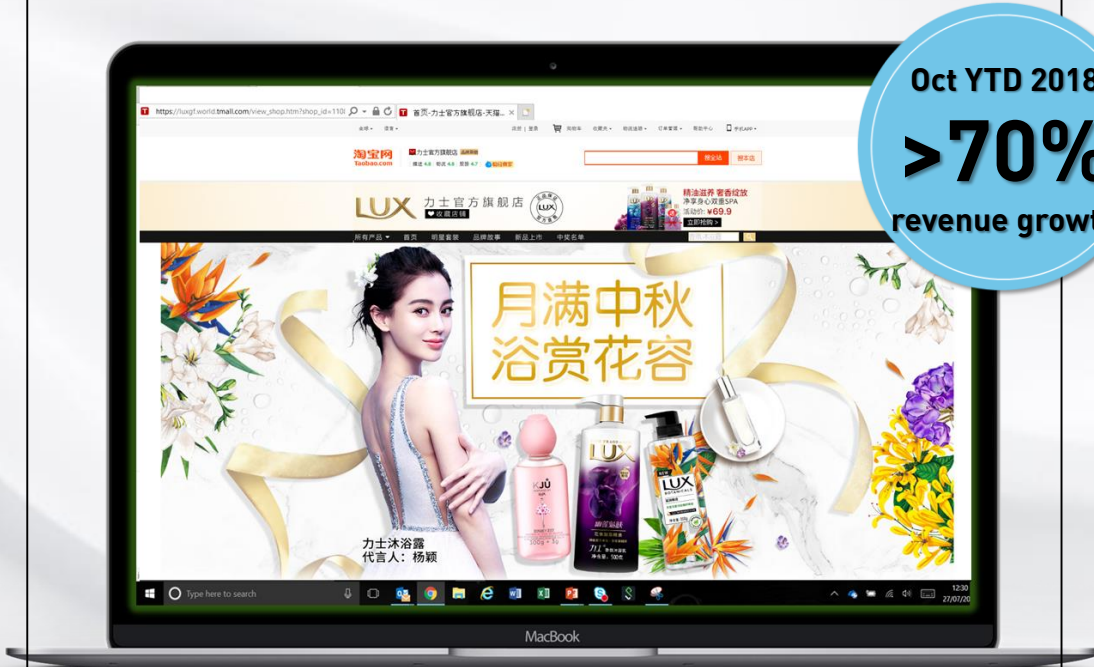
FUEL FOR GROWTH (NRM, ZBB, 5S)



# HIGH GROWTH SPACES

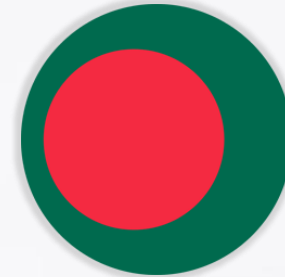
## High growth coming from growing channels and markets

E-Commerce growth well ahead of market



Oct YTD 2018  
**>70%**  
revenue growth

Double digit growth in nascent markets



Oct YTD 2018  
**+12%**  
growth



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# HIGH GROWTH SPACES

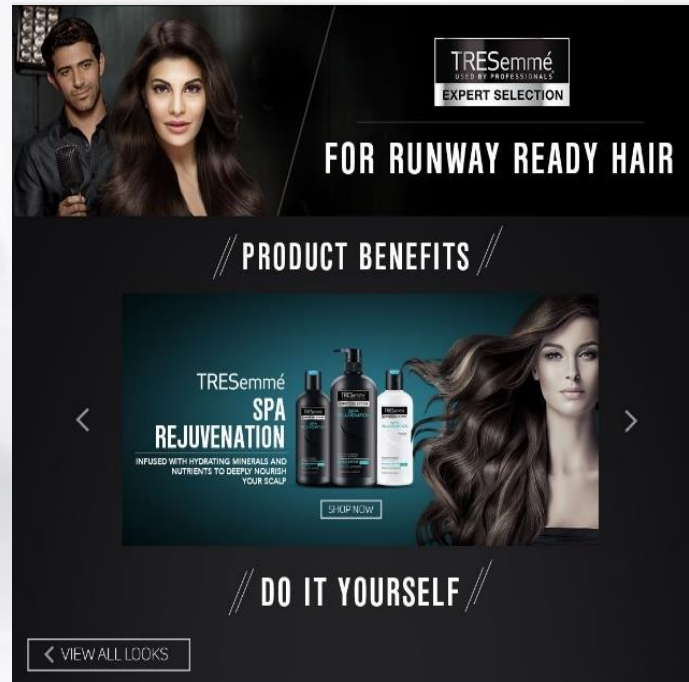


High growth coming from premiumisation and growing channels

## Premiumisation



## E-Commerce



## Health & Beauty



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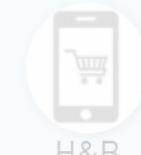


### High Growth Spaces

Prestige

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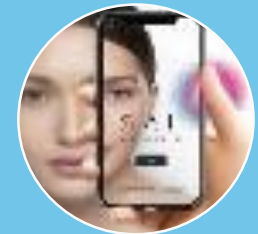
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# NEW MODEL OF MARKETING - PURPOSE



## Connecting with “media dark” India via Lifebuoy Infection Alert System



Disease Data Analysis



Risk Level Identification



Infection Alert System



1-1 Communication



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# NEW MODEL OF MARKETING - CONTENT



Reaching >150m households via Lux Golden Rose Awards

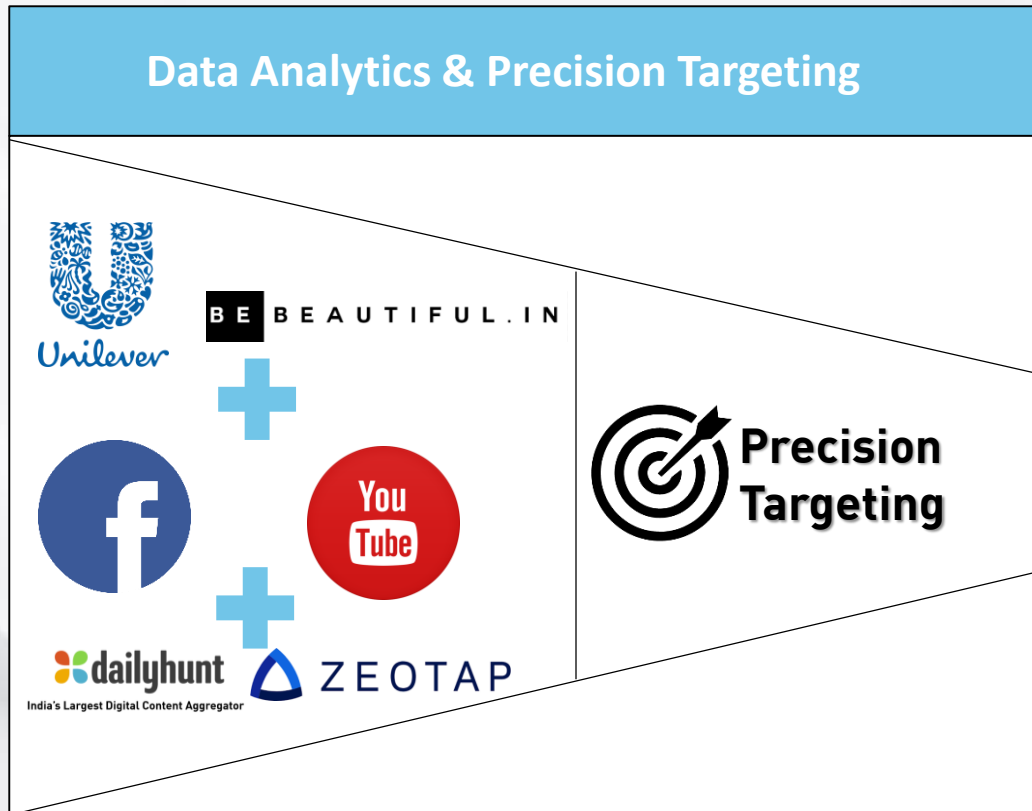


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# NEW MODEL OF MARKETING - DATA

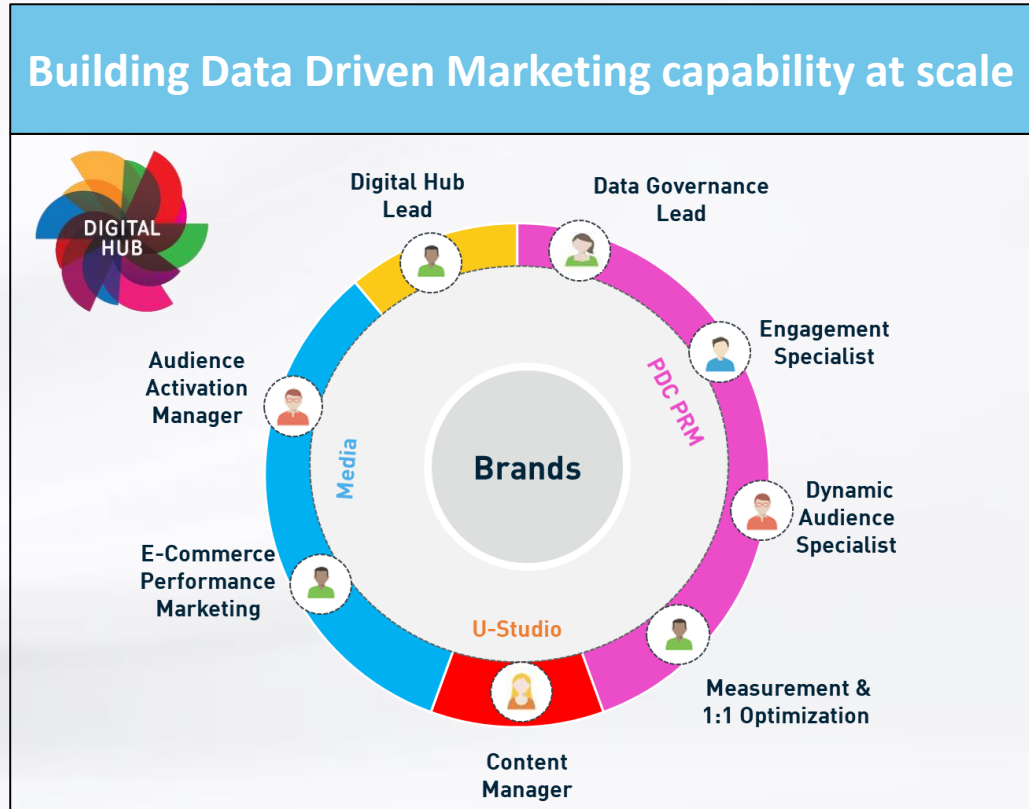


## Leveraging data to drive precision



# NEW MODEL OF MARKETING - DATA

## Scaling up Data Driven Marketing capabilities at speed



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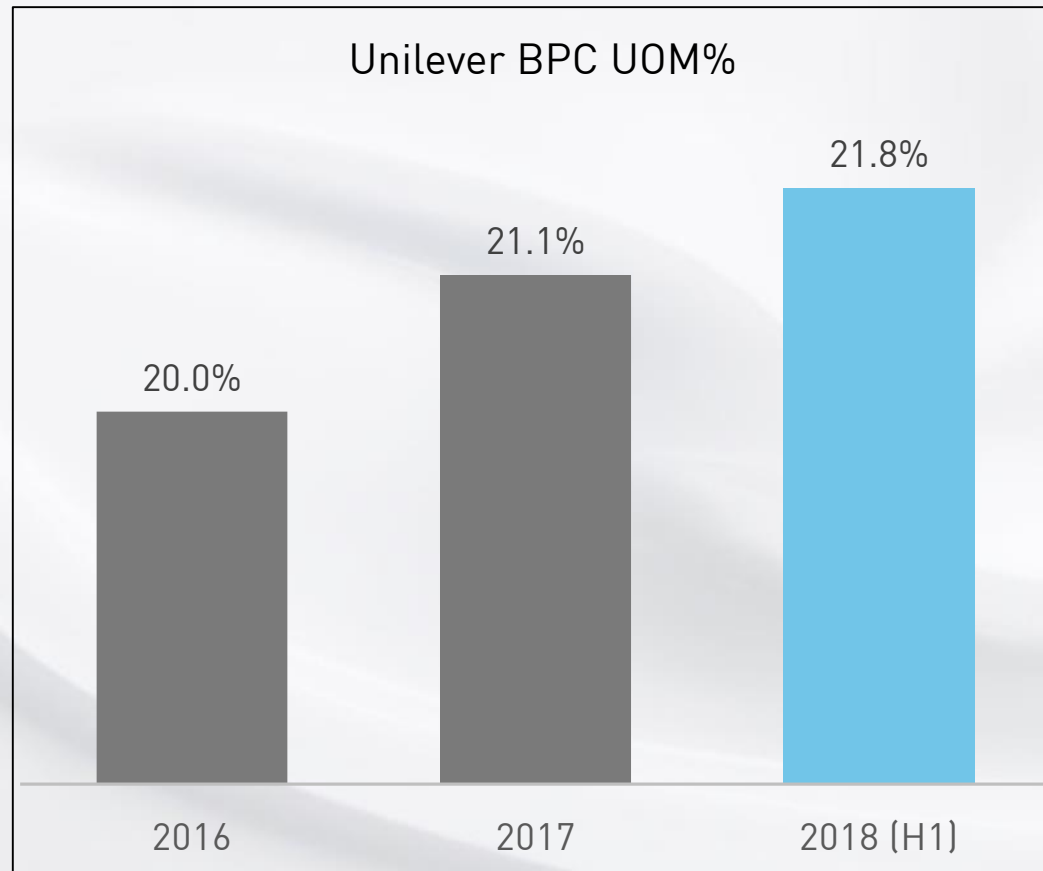


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# SUCCESSFUL MARGIN EXPANSION

Led by GM% improvement and efficiencies with increased media spend



NET REVENUE MANAGEMENT

**5s** savings

**4G** ZERO BASED BUDGETING



# IN SUMMARY

## Driving growth in Beauty and Personal Care

- Leading global player in Beauty and Personal Care
- Clear global strategy, winning locally
- Well-connected global and local organization
- New model of marketing: Purpose, Content, Digital & Data Driven



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# Q&A

people are beautiful