



Sugar™
Free



▶ **The Indian FMCG Industry is worth \$37 billion**

- Spanning over 8 million outlets and
- Reaching out to 1.26 billion people

▶ **Last few years were a challenging one for the industry as**

- High food inflation impacted consumers spending in discretionary categories
- Consequently value growth in the FMCG market reduced from 13% in 2012 to 12% in 2013 and to 7% in 2014

▶ **Accelerated growth potential for FMCG sector in times to come, with**

- Increase in penetration of brands
- Rising per capita income projected to expand at a CAGR of 11.1% over 2014-20



(Source: Nielsen & Industry Estimates)

- ▶ SugarFree, Everyuth Peel-off, Everyuth Scrub and Nutralite have **maintained leadership position** in their respective categories

- ▶ Continued thrust on **new product launches** :

- ▶ Test marketed SugarFree "Stevia" in limited geographies

- ▶ On Everyuth front,

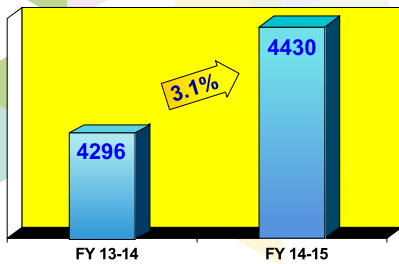
- A "**Sachet pack of Everyuth Tulsi Turmeric face wash**", a first in India and is intended to provide convenience and better access to consumers

- "**Advanced Hydro-Active Walnut Apricot Scrub**" a first in India with revolutionary Hydrogel technology

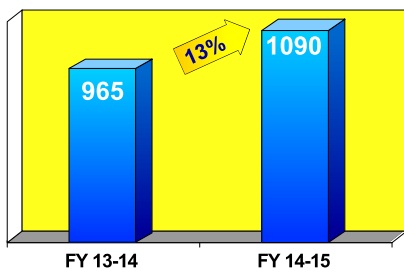
- "**Advanced Refreshing Face Wash**", which has unique combination of Lemon & Green Apple extracts along with Nano Vita-C that gives naturally clear, bright & refreshed skin with every wash.

- ▶ To enhance the health benefits for the consumers, we have upgraded base formulation of **Nutralite with Omega 3**

Consolidated Gross Sales
(Rs. Mio.)



Consolidated Net Profit
(Rs. Mio.)





- ▶ Continues to **lead** in sugar substitute market with its' both variants
 - **Sugar Free Gold**
 - **Sugar Free Natura**
- ▶ Brand growth is being driven by focus on converting non users for **Sugar Free Gold**. This is being accelerated through
 - New television campaign targeting "**sugar consumption**" directly
- ▶ Sugar Free Natura growth is being driven through increasing usage in the "**culinary space**". Natura continues to work with the famous **Celebrity Chef Sanjeev Kapoor**
- ▶ Sugar Free also continues to support "**Donate your Calories**" initiative in partnership with Akshaya Patra
- ▶ **Extensive use of digital medium** to directly connect with consumers





- ▶ **Leadership position maintained** in facial cleansing Peel-Off & Scrub despite a highly competitive landscape and a slowdown in discretionary consumer spend.
- ▶ Face wash business remained challenging with aggressive competition.
- ▶ **"Advanced Hydro Active Walnut Apricot Scrub"** and **"Advanced Tulsi Turmeric face wash"** have been voted as 'Product of the Year - 2015' in their respective categories
- ▶ Existing products and innovative new launches supported by:
 - Driving **integrated campaigns** across multiple mediums
 - **Extensive use of the digital medium** to directly connect with the consumers
- ▶ Will continue focusing on an **expanded portfolio** and **improving distribution reach** to build on our leadership position further

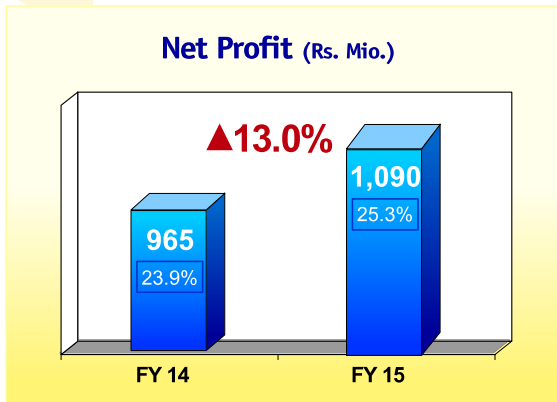
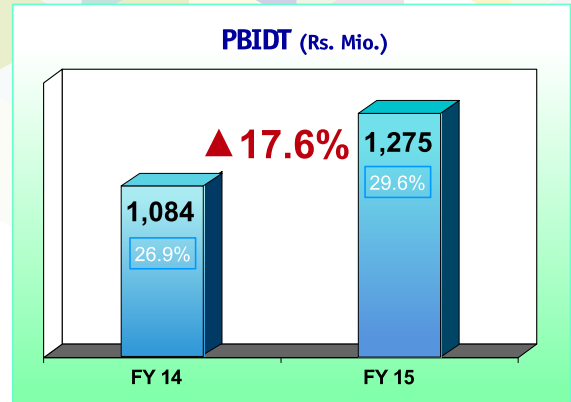
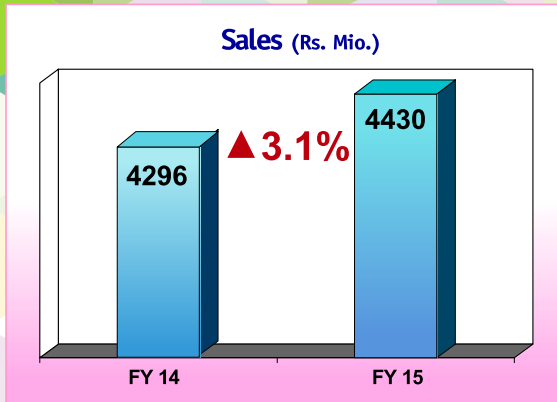


Nutralite - 'Healthier Choice'

- ▶ Nutralite has gained market share by 330 basis points and maintained its **number one position** with a market share of 37.6%.
- ▶ We strengthened our product portfolio by introducing Nutralite with **Omega 3 benefits**.
- ▶ Continued efforts to **increase distribution reach** and tap new accounts to widen the customer base
- ▶ With Indian consumers adopting **healthier lifestyles**, Nutralite shall continue enjoying a distinct position of being a '**Good for the heart and health**' brand



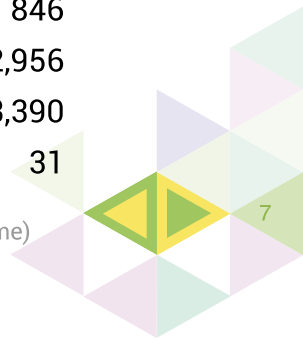
Key Financial Numbers - FY 15 (Consol.)



Consolidated Financial Position as at 31st Mar '15

	Rs. Mio.
Net Worth	: 4,060
Net Fixed Assets	: 846
Net Current Assets	: 2,956
Cash & Bank Balance	: 3,390
Capex in FY15	: 31

(% mentioned within the bar represents % to total Opr Income)



▶ **Driving Category growth:**

- Continue to deploy insight based **communication and sales promotion** for greater consumer impact
- Deploy category building strategies through the stronger use of **digital media & consumer contact points**

▶ **New Products:** Continue to focus on winning new consumers and increase consumption amongst the current franchise on back of insight based innovation program

▶ **Distribution:** New Go to Market model to widen brand reach that feeds consumer demand and capitalizes on untapped opportunities

▶ **Acquisitions & business partnerships:** Explore opportunities which are consistent with the overall business strategy





Thank You