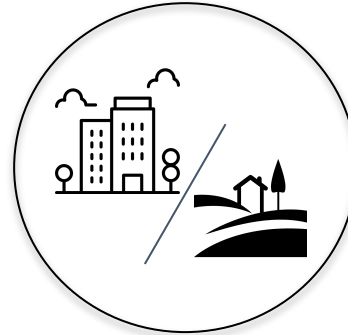




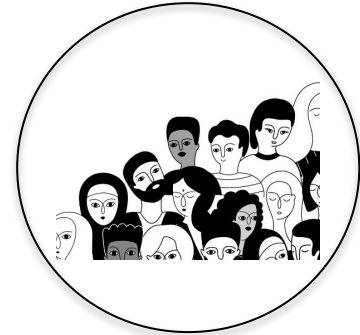
Colgate-Palmolive (India) Limited
Nuvama India Conference 2024



**Rising
Prosperity**



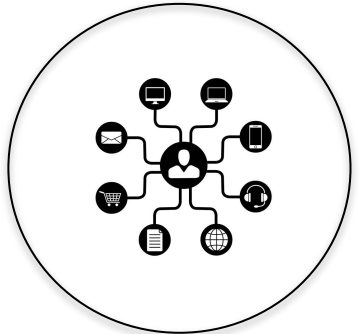
**Divergent
Development**



**Divergent
Preferences**



**Divergent
Roles for Women**



**Divergent
Shopping Habits**

**Let's talk
about**

The Immense Opportunity

Our Purpose

Strategy in Action

Financial Performance

Category Volume and Premiumization



Toothpaste

Indexed to Philippines	U+R	Urban	Rural
Per Capita Consumption	0.6	0.7	0.5

20%

Urban Households brush twice a day

55%

Rural Households do not brush daily

88%

Category below 140 ASP Index

Category Volume and Premiumization



Toothbrush

Monthly Spends	Urban	Rural
Per Capita	Rs. 4.0	Rs. 1.3

78%

Category
below INR 40

Source: Internal Data, ACN Retail Audit



Opportunity to Improve India's Oral Health



75%

Urban population

**Believe their teeth are in
excellent condition**



89%

Urban population

**Actually suffer from some
oral health issues**



9% of India's population visits a dentist every year

**Let's talk
about**

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A photograph of three young women smiling and making peace signs. The image has a warm, reddish-orange tint. The woman on the left has long, wavy hair and is making a peace sign with her right hand. The woman in the center has glasses and is also making a peace sign with her right hand. The woman on the right is partially visible, also making a peace sign with her right hand. A white smiley face icon is positioned below the text.

*To help people improve
their oral health and
beauty.*

We're Best Placed to Do This

India's # 1 Oral Care Brand



Most Penetrated

9/10 households

Source: Kantar World Panel



We're Best Placed to Do This

India's Most Loved Oral Care Brand



Most Recalled

64% top of mind



Most Considered

87%

Source: Internal Data



We're Best Placed to Do This

Wide Portfolio Catering to All Needs



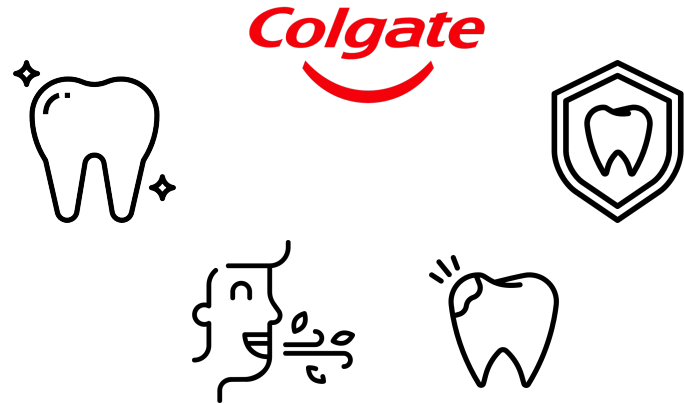
3X

vs. #2 brand



1.4X

vs. #2 brand



Source: ACN Retail Audit



We're Best Placed to Do This

Superior Tech for Superior Health



900+ | Scientists

750+ | Quality
Specialists



1500+
Patents per year

Source: Internal Data





**Let's talk
about**

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Strategy in Action: Growth Pillars

Strategic Pillars

Lead Toothpaste Category
a) Volume
b) Grow Core

Premiumize through Science Based Superior Innovation

Lead Category Growth in Toothbrush & Devices

Build Personal Care

Enablers

Superior Mix (Products, Communication, Execution)

Driving Financial Efficiency

Digital at the Core

Organizational and People Capabilities

Environment, Social, Governance (ESG)

Driving Consumption: Urban - Brush at Night



Driving Consumption: Urban - Brush at Night

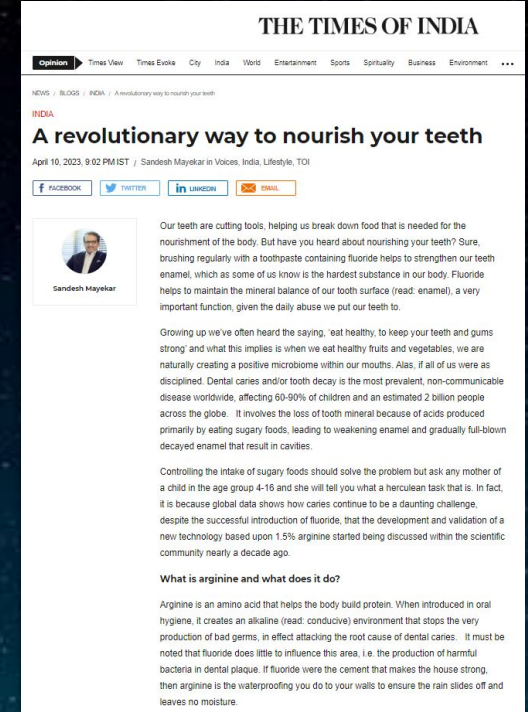
Contextual In-store



Contextual Outdoor



KOL Articles



Driving Consumption: Amplifying our Efforts

Bright Smiles, Bright Futures® Government Partnerships and Public Policy



50+
years
171mn
kids reached

60k
schools
10mn
Additional kids
By 2025

Government & UN Partnerships



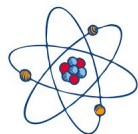
Maharashtra, Karnataka, TN, UP, Gujarat,
Andhra Pradesh, Punjab, Rajasthan



Source: Internal Data



Accelerating the Core



Superior technology and consumer experience
v/s eyeball competition



Best-in-class Communication
Tested in top 25% of advertising



Amplified commercial investment behind winning mix

Source: Kantar Link Test, Internal Data



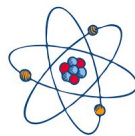


Accelerate Premiumisation

**1. Own
Proactive
Health
with Total**

**2. Create Desire
for Whitening
with
Visible White**

**3. Build
Therapeutics
Credentials
with
Periogard**



Industry leading technology

125+ global patents



Strong residual awareness

1 out of 2 people aware



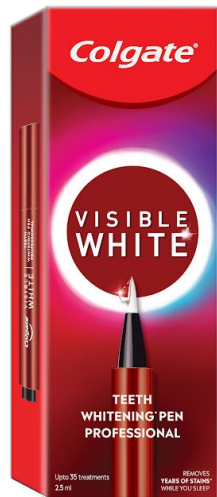
Consistent investment for brand building

Best-in-class communication

Create Desire for Whitening



Pioneers in Whitening
#2 segment across the world



Innovative Technology & Formats
To build future-ready portfolio



New proposition to build relevance
Tested in top 25% of advertising

Source: Kantar Link Test





Build Therapeutics Credentials with Profession



80+ years of partnership
Leverage Strong Association



Digital-First Connects
Dentist First, Virtual Reality Masterclass

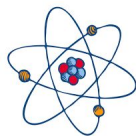


Leading Position in Pharmacy
Through a prescription focus

Lead Toothbrush Category Growth



Leadership position in the category



Superior portfolio across price tiers



Curated Commercial plans
By State X Retail Environment

Superior Consumer Offering Across Tiers

Contemporary Packaging >> Consumer Relevance



Competitive growth on premium tier



Source: ACN Retail Audit



Build Personal Care



Nascent Category, Scope to Grow
Penetration of Body Wash - 2% AI (U+R)



Strong brand equity, built over 73 years
~60% of the target audience aware



Wide Global Portfolio to choose from

Strong Fundamentals

Leverage Distribution Strength



1.3X

Growth in TDP vs. 2021

TDP= Total Distribution Points

Perfect 5P in Modern Trade



95%+

Compliance in Planogramming,
On Shelf Availability

Source: Internal Data



Digital at the Core

Enhancing Marketing Effectiveness



Analytically driven financial efficiency

AI/ML based GST compliances, Audit exceptions

**Analytics enabled business decisions
E.g. ROI tools**

Simplifying Supply Chain

AI/ML based demand forecasting

Optimised Network Inventory

Org & People Capabilities

Capability



Culture



Caring

Promoting Mental Wellbeing



#GetTalking

More Employee Centric Benefits



Flexibility,
Higher
Coverage

Doubling Down on Our ESG Strategy



Waste Management

Maintain **TRUE® Zero Waste certification** for owned plants

Certification maintained for all CP plants

E N V I



Reusable, recyclable or compostable plastic packaging

100% by 2025 (Usage, Collection)

80% recyclable packaging achieved by FY 2022-2023
120% collection of post consumer plastic in FY 2022-2023

R O N



Water Usage

Net Zero water at India level by 2025

75% of our factories are water positive (Goa, SriCity & Sanand)

M E N T



Bright Smiles, Bright Futures®

Oral health education for **10Mn children** additionally by 2025

171 Mn Children reached since 1976

S O C



Empower women with Digital+Financial Literacy

100K women by 2025

30K done by FY 2022-2023

I A L

Robust Governance & Cost Optimisation

Robust Governance Mechanism

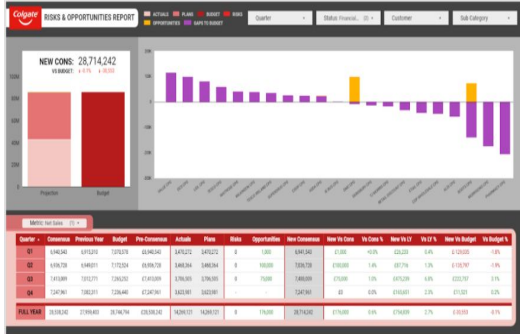
RGM to Fuel Consistent Growth

India 'Fund The Growth': Global Best Practice

Stakeholder Value Creation



Retail Environment X Promo Optimisation



Execution across functions



**Let's talk
about**

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Our Purpose

Strategy in Action

Financial Performance

Strong Performance (YTD Dec '23)

Net Sales

Domestic (+9.1%); Company 4,164 Cr. (+8.3%)

Highest Ever Gross Margins

69.6%

Highest Ever Advertising

14.2%

Strong Profit to Sales

944 Cr.

(+29.1%)

Positive Stock Performance

Colgate Palmolive India Limited



+19%

YTD growth
NIFTY 50



+30%

YTD growth
NIFTY FMCG

+18%

YTD growth
BSE 100



- Continue to be excited about India
- Colgate on the podium
 - Strong Brand
 - Strong financials
 - High quality talent
- Double down on our purpose

Colgate[®]

