



COLGATE-PALMOLIVE (INDIA) LIMITED

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www.colgatepalmolive.co.in  
CIN : L24200MH1937PLC002700

February 13, 2024

The Secretary  
BSE Limited  
P.J.Towers- 25<sup>th</sup> floor  
Dalal Street  
Mumbai- 400001

Scrip Code: 500830

The Manager – Listing Department  
National Stock Exchange of India Limited  
Exchange Plaza, C-1, Block – G  
Bandra – Kurla Complex  
Bandra (East), Mumbai 400 051

Symbol: COLPAL  
Series: EQ

Dear Sir(s),

Sub: Investor/Analyst Meet- Presentation

This is in furtherance to our letter dated February 7, 2024 regarding intimation of Investor/Analyst meet to be held today i.e. February 13, 2024 at 11.00 a.m. (IST). Please find enclosed herewith a presentation to be made by the Company at the said Analyst/Investor meet.

Kindly take the same on record.

Thanking you,  
Yours Sincerely,  
**For Colgate-Palmolive (India) Limited**

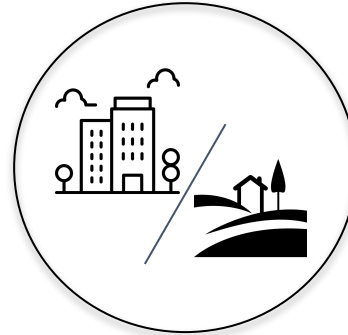
Surender Sharma,  
Whole-time Director - Legal &  
Company Secretary.  
DIN: 02731373



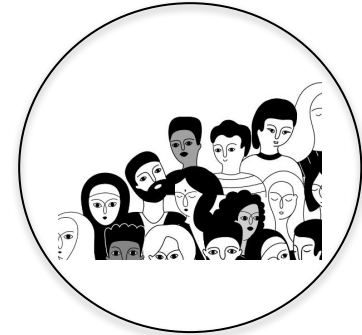
Colgate-Palmolive (India) Limited  
Nuvama India Conference 2024



**Rising  
Prosperity**



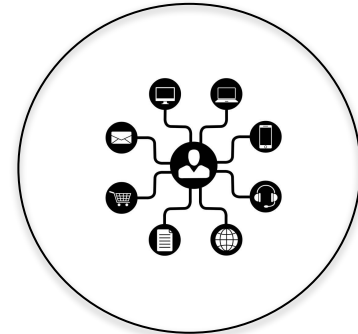
**Divergent  
Development**



**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**

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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 is partially obscured by the text. The woman in the center is wearing glasses and a bindi. The woman on the right is in the foreground, smiling broadly. 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



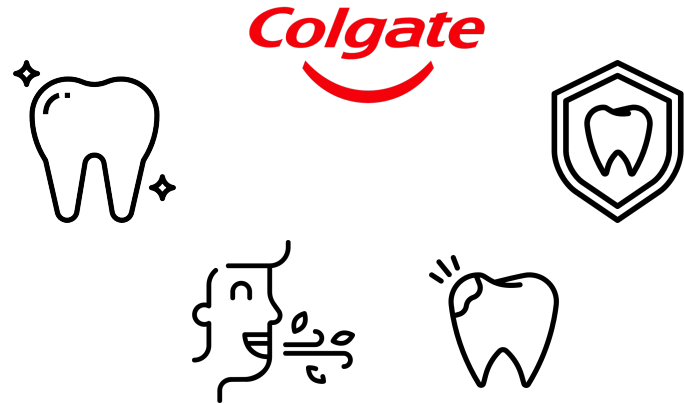
**3X**

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



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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

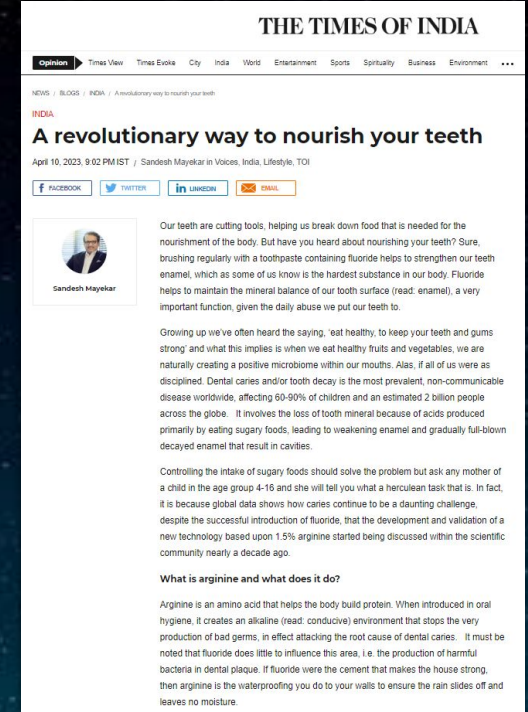
## Contextual In-store



## 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**

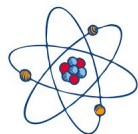
Maharashtra, Karnataka, TN, UP, Gujarat,  
Andhra Pradesh, Punjab, Rajasthan



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





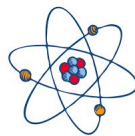


# Accelerate Premiumisation

**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



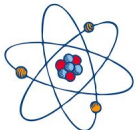
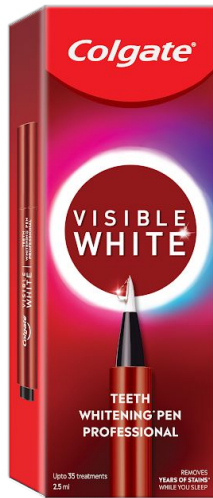
## Consistent investment for brand building

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



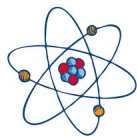
**Leading Position in Pharmacy**  
Through a prescription focus



# 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



### 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

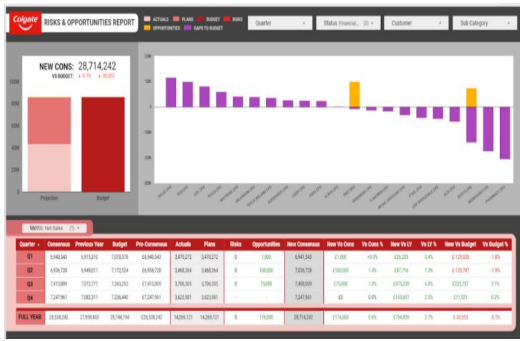
## RGM to Fuel Consistent Growth

## India 'Fund The Growth': Global Best Practice

Stakeholder Value Creation



Retail Environment X Promo Optimisation



Execution across functions



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## 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

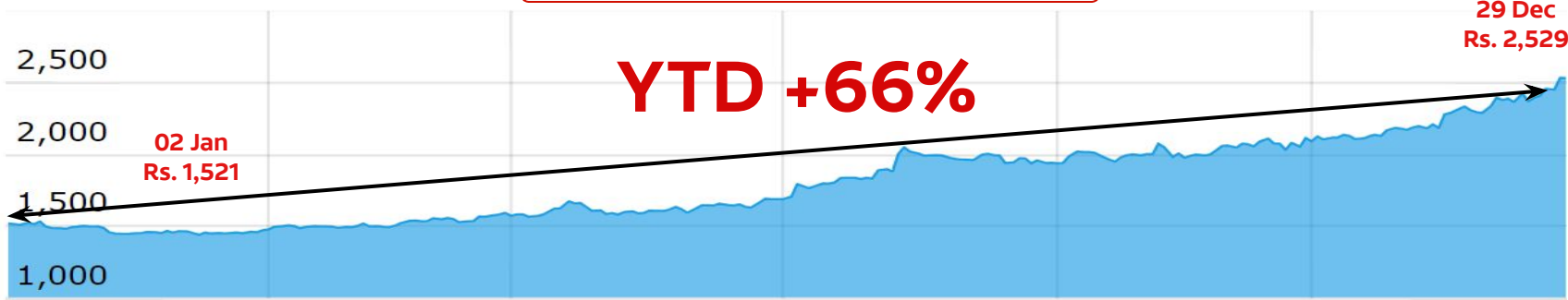
944 Cr.

(+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*<sup>®</sup>

