



Analyst Meeting - May 2022

Safe Harbour Statement

This communication, except for the historical data, may contain forward-looking statements, including words, phrases, numbers that set forth anticipated results based on management's current plans and assumptions. These statements are made on the basis of the Company's views and assumptions as of this time. The Company does not, nor does any other person, assume responsibility for the accuracy and completeness of those statements. The Company cautions investors that any such forward-looking statements are not guarantees of future performance and that actual events or results may differ materially from those statements. Actual events or results may differ materially because of factors that affect international businesses and global economic conditions, as well as matters specific to the Company and the markets it serves. The Company based on any of the above factors is free to modify, amend, alter or take necessary corrective changes in such manner that the forward-looking statements contained herein may alter, and the Company undertakes no obligation to update these statements whether as a result of new information, future events or otherwise, except as required by law or by the rules and regulations.

Leadership Change

Prabha Narasimhan will join Colgate-Palmolive (India) Limited as **Managing Director and CEO** effective September 1, 2022,



Ram Raghavan, promoted to lead Global Enterprise Oral Care role for Colgate Palmolive Co

Highlights

Brand Health

71%

Top of Mind Awareness
(+700 BPS vs 2019)

88.1%

HH Penetration
(India's Most Penetrated
Brand)

Financial Metrics

5,066 Cr

Net Sales

67.1 %

Gross Margin

30.9%

EBITDA

Digital and Analytics



+500 BPS

Driving Oral Care
penetration on E-Com

Sustainability



Recyclable Tubes



Recyclable Brushes

Our strategic framework



Our strategic framework

Winning
with brands



**Driving
Profitable
Growth**



***Dil mein umeed jagao,
SMILE KARO AUR SHURU HO JAO !***

India's #1 Toothpaste



7 out of every 10 HHs in India purchase **Colgate Strong Teeth**
2X+ Market Share than any other toothpaste

Making Colgate Strong Teeth, STRONGER



1937

1937



2007

2007



2000

2000



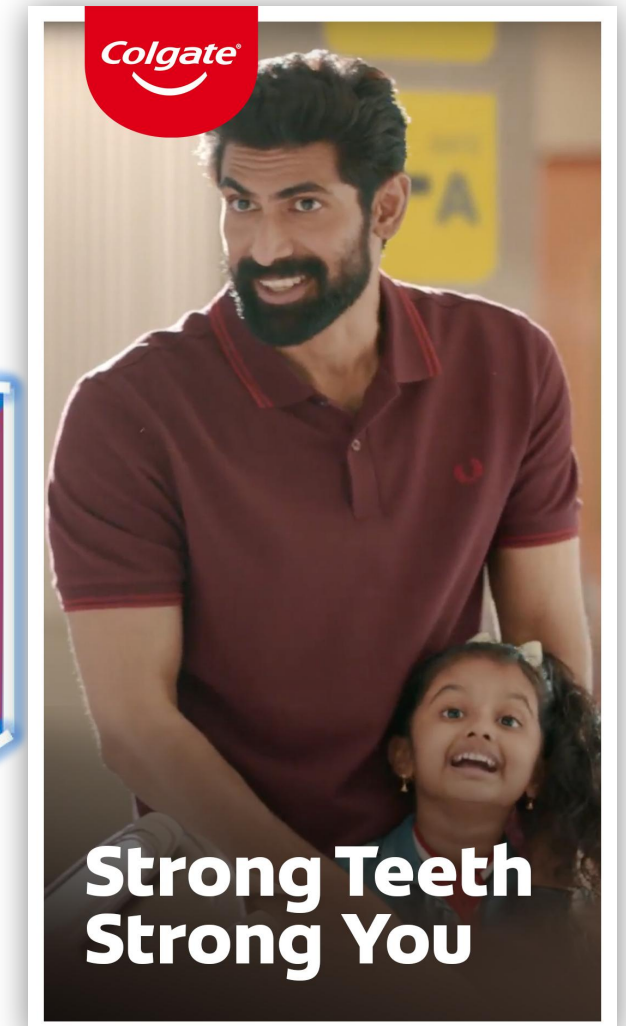
2019

Double Digit
Growth

Even STRONGER in 2022



Even STRONGER in 2022



India's #1 Toothbrush

India's #1 selling & #1 distributed toothbrush

1.7X+ Market Share against the next brand



Relaunching India's #1 Toothbrush



Superior Technology



Largest Ever In-Store Activation



Accelerating Growth in Naturals



#1

Natural Ingredient Toothpaste



Extending SALT Equity



Continued Consumer Connect



Highlighting regional culture codes

Accelerating in Ayurveda

**NEW!
BEST
EVER***



**Communication
Refresh**



**Aggressive
Sampling**



**Regimen
Building**

Our strategic framework

Winning
with brands



**Driving
Profitable
Growth**



**Leading
Innovation**



Strategic outlook to innovation

**Technological
Superiority**



**Build
Platforms**



**New
Opportunities**



TECHNOLOGICAL SUPERIORITY

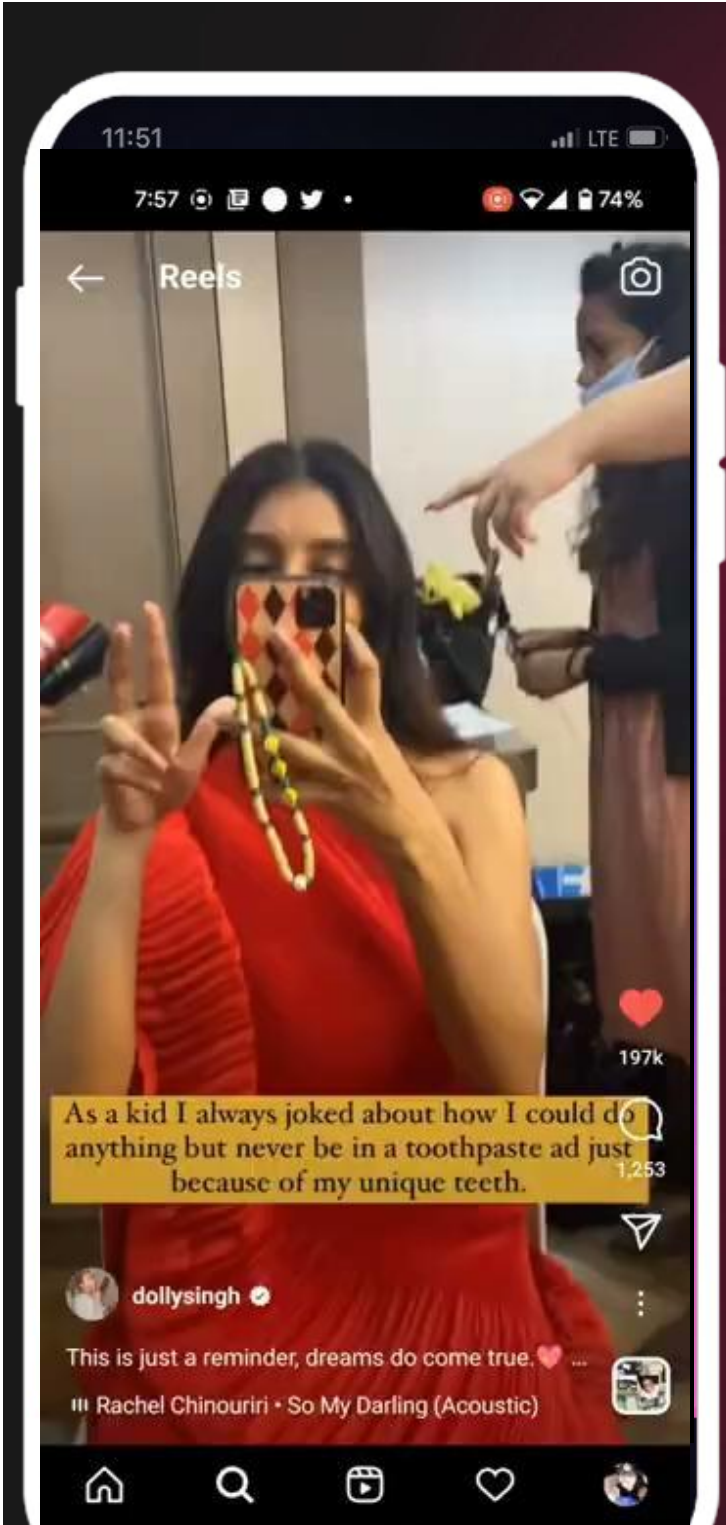


Introducing...

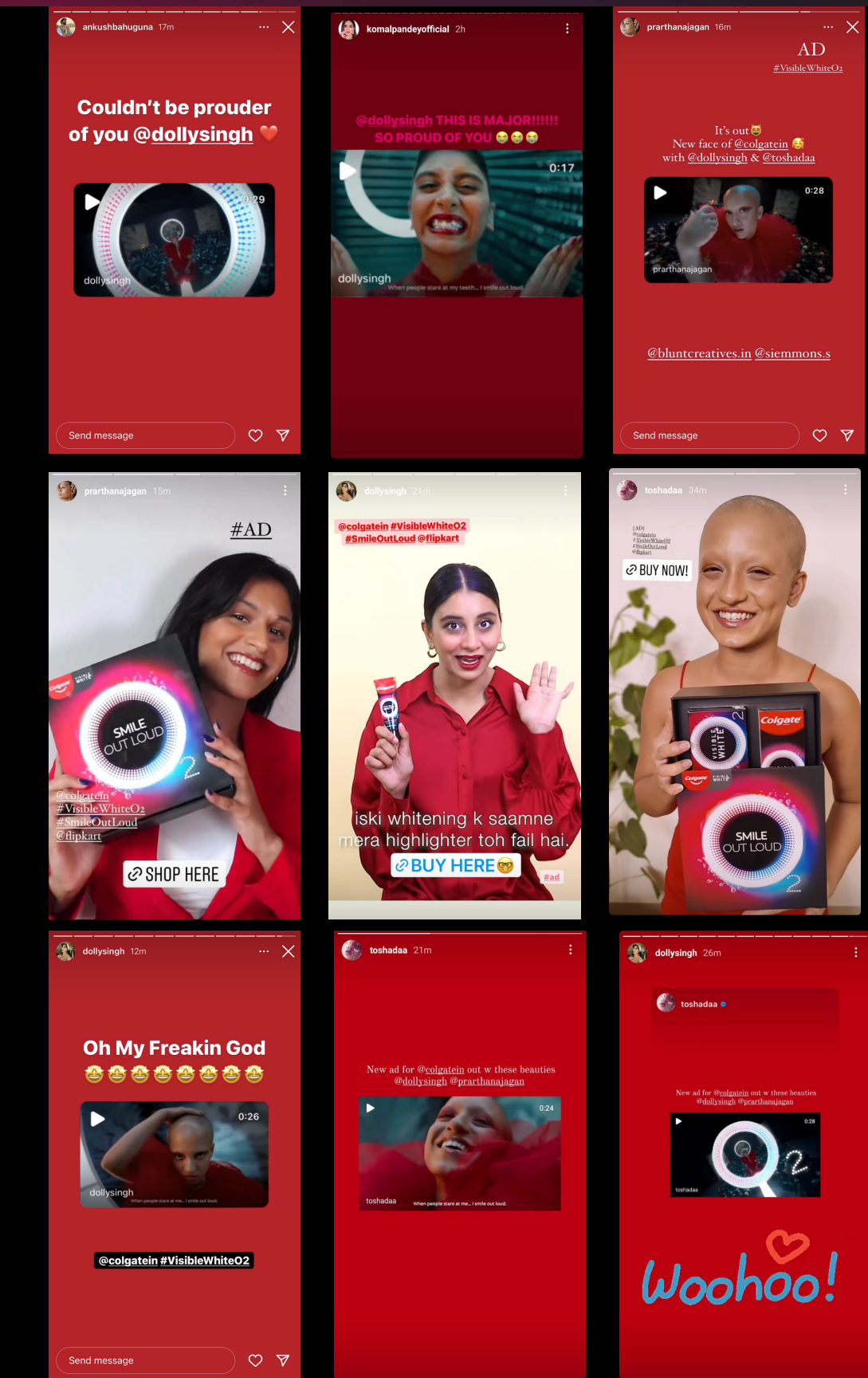
REVOLUTIONARY
Active-Oxygen
Technology

COLGATE
VISIBLE WHITE O2

TAKING THE COUNTRY BY STORM



- archiim97 For someone a crooked teeth girl like me , i feel inspired and i hope i'll be able to have a big smile on my face one day 😊. Thank you for being you ❤️
- beyondmakeovers You proved that one just needs to accept themselves just the way they are ❤️ also, kudos to @colgatein for not just featuring perfect teeth in their ads.
- belle__vie Saw this commercial yesterday.. Flawless, inspiring, motivating etc etc... 🌟
- churchofbrunettes this is so beautiful I'm honestly so happy for you. best thing on internet today, best of luck to you <3



Premium Therapeutics - Gum Health

9/10 Indian Adults have
Gum Problems

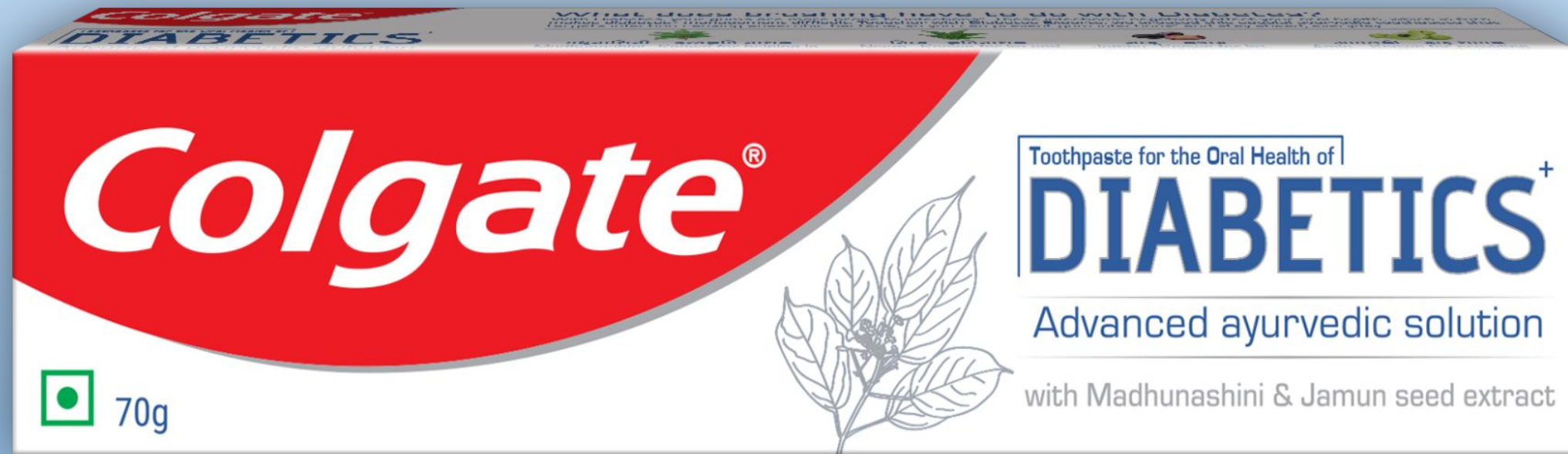


Customer Reviews - 4.6/5



Premium Therapeutics - Oral Care for Diabetics

70MM Diabetics in India
Projected at 135MM by 2025



Customer Reviews - 4.7/5



Premium Therapeutics - Oral Care for Diabetics

NEW OPPORTUNITIES



Re-igniting Palmolive

BUILD PLATFORMS

PALMOLIVE

67%

**Aided Brand
Awareness**

**Natural
Premium
Sensorial**

**#3
in Body Washes**

Source: All India Quant Survey, EM, Kantar

Palmolive - Storming into the Face Category

BUILD PLATFORMS

Bodywash

X

Face
Cleansing

13X

Source: Nielsen Data and Internal Data - Category Value

The Palmolive Experience

Cleansers, Scrub & Masques



Foam: MRP 425
Scrub: MRP 599
Masque: MRP 599
Gel: MRP 299

Palmolive - Exclusive Modern Trade Launch

BUILD PLATFORMS

Key DT Customer

4.2%

\$SOM

Source: Exclusive Launch - Key Customer Scan Data Mar'22

Making Toothbrushes Smarter

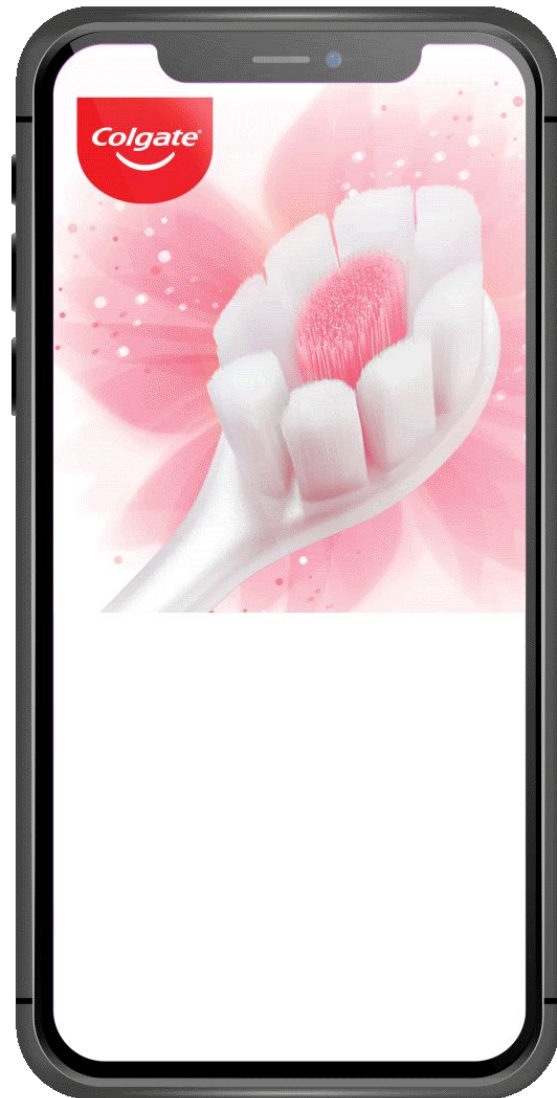
BUILD PLATFORMS



Making Toothbrushes Smarter

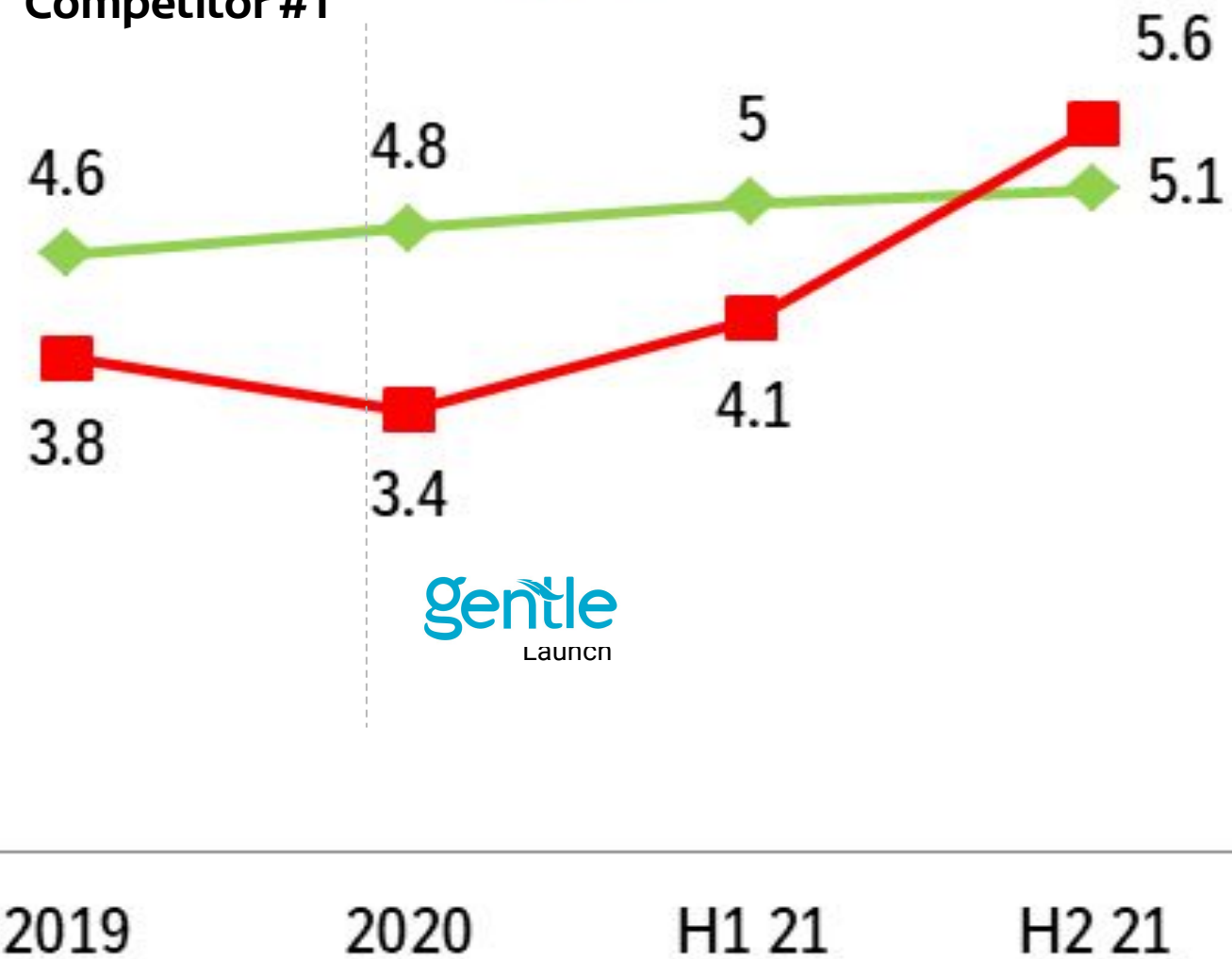
Amazon's **Choice** for "toothbrush"

BUILD PLATFORMS



Sensitive Segment
Competitor #1

—■— CP (Gentle)



Our strategic framework

Winning
with brand



Leading
Innovation



**Driving
Profitable
Growth**



**Digital
Acceleration**



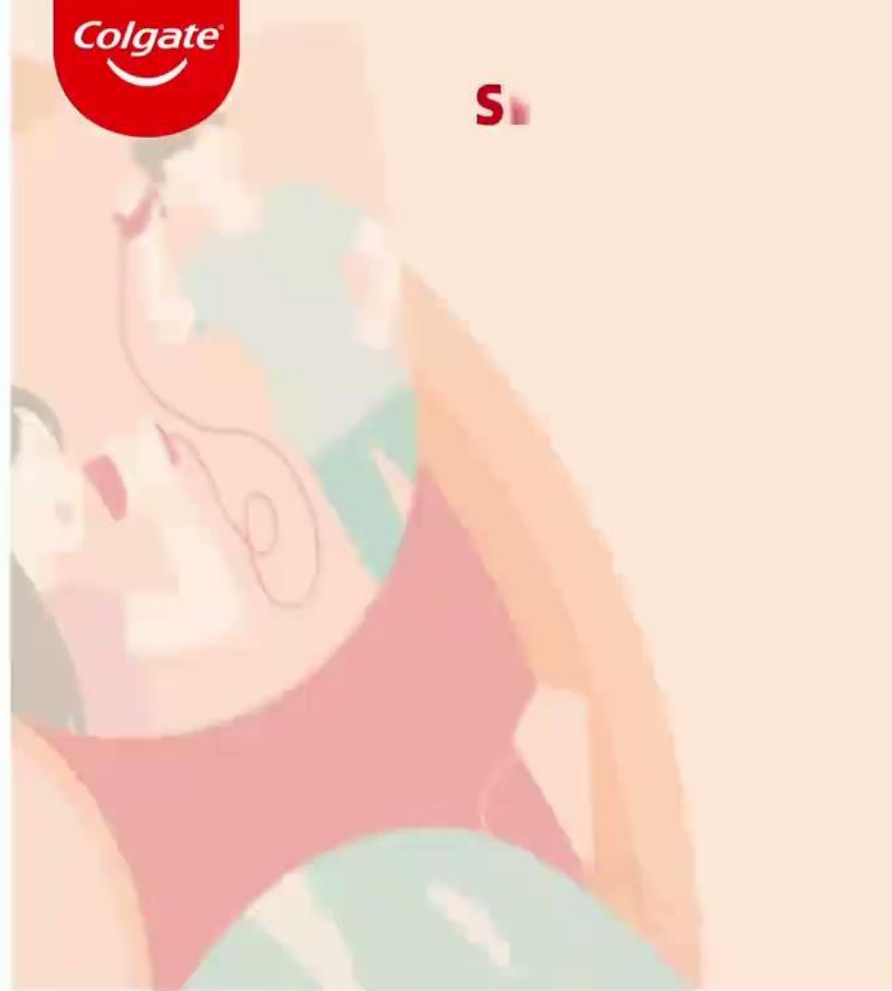
Digitally driving Colgate Equity

Colgate

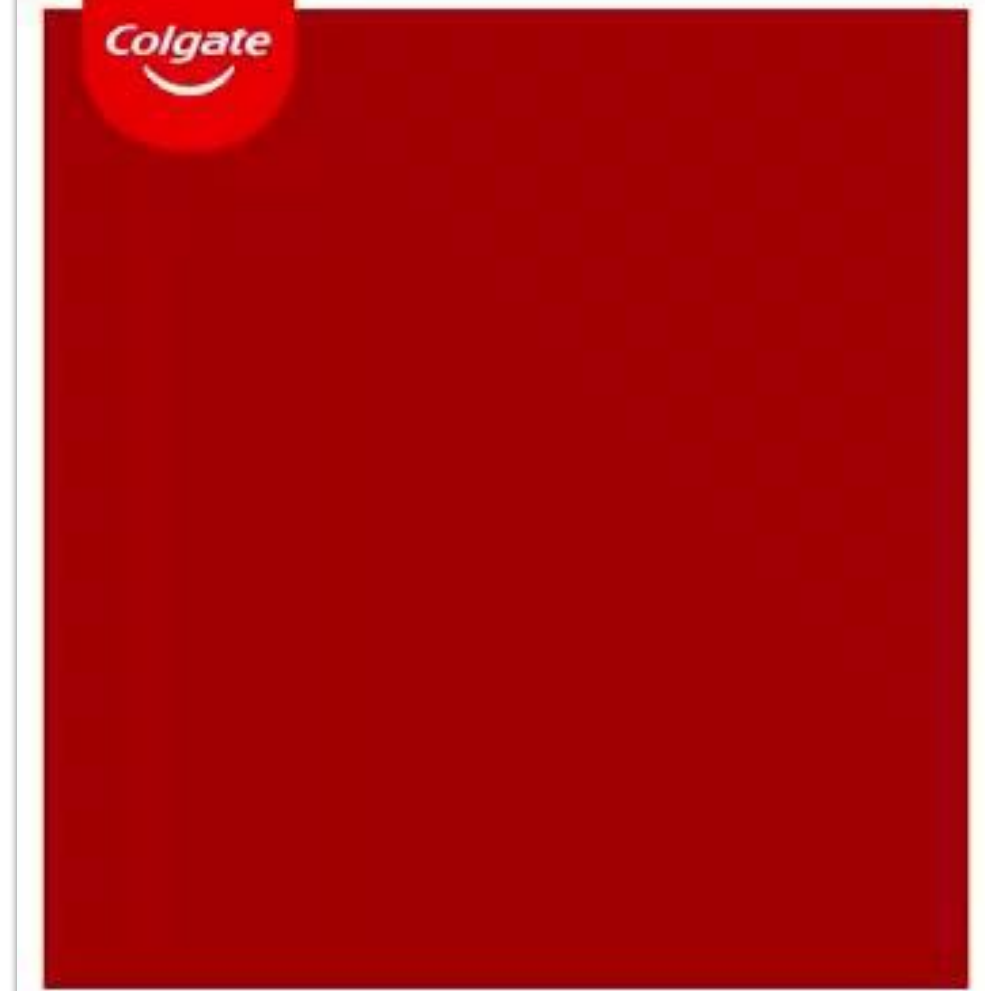


Colgate

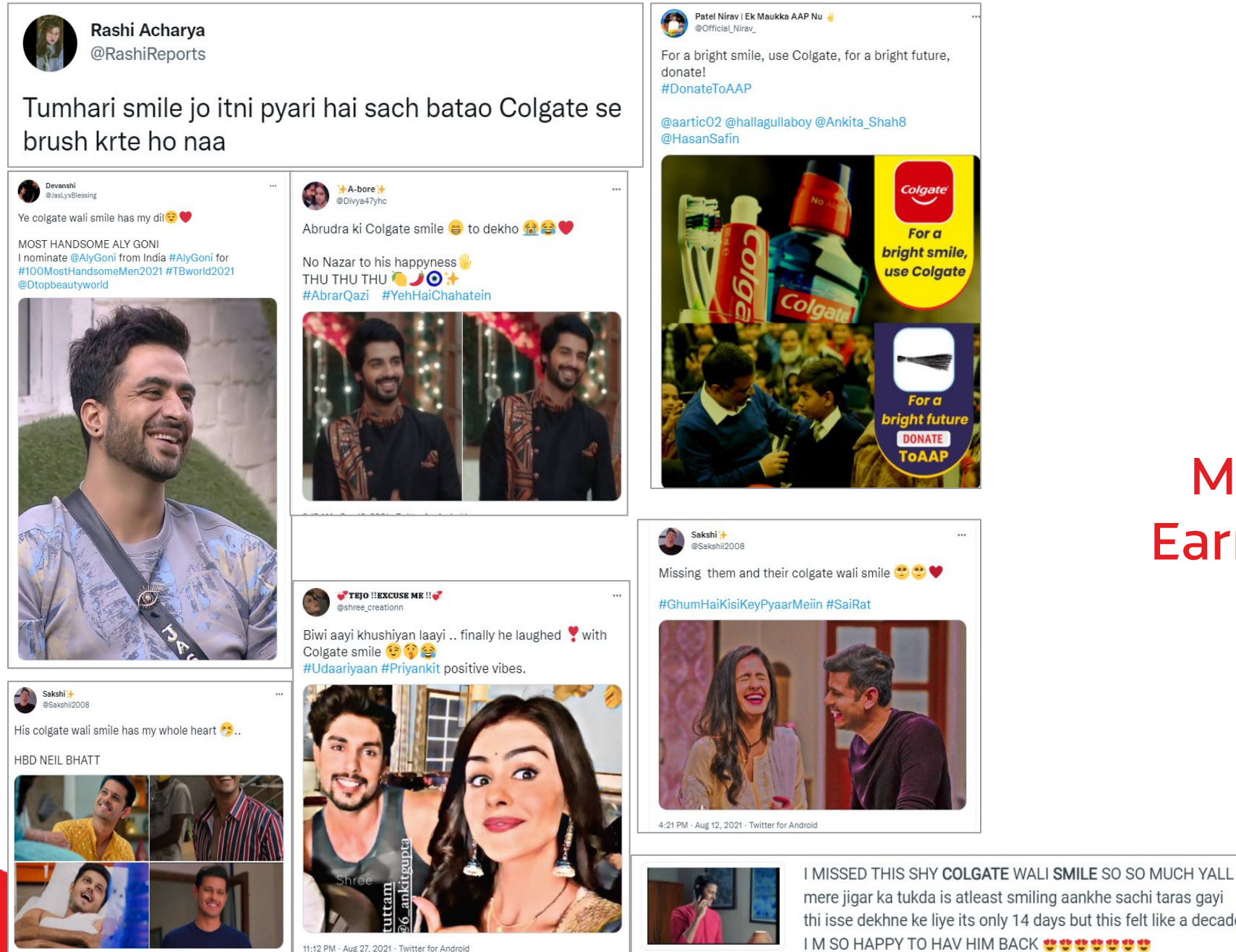
S



Colgate



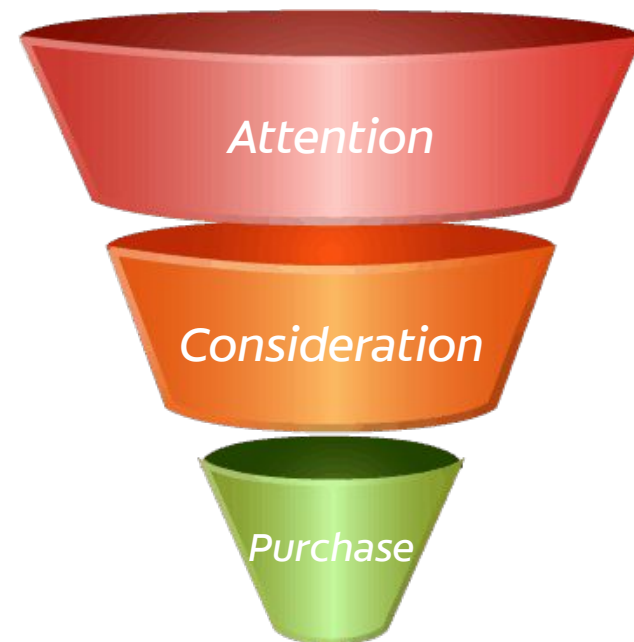
“Owning” Smiles in Social Media



Mentions of “Colgate Smile” -
Earned media reaching +250MM
Indians every Quarter

Digital partnerships to build category

Full Funnel Performance Marketing



Driving Rural Reach



Building Regional Content



Meta YouTube Google

Building D2C as a Channel

cpbrush.co.in



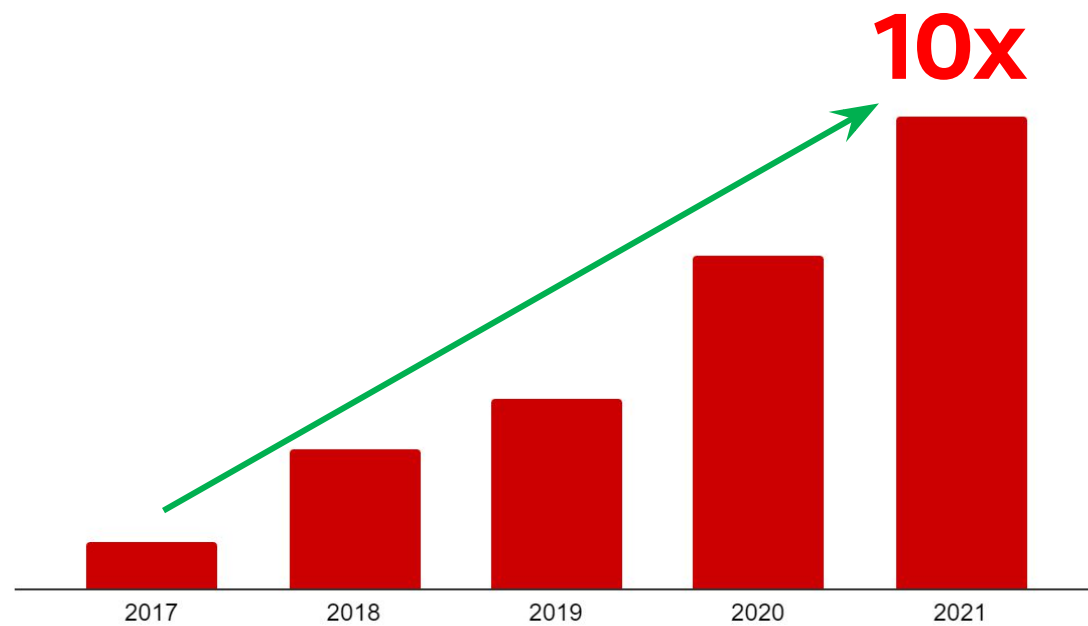
Monthly GMV (indexed)

M1 X

M3 5X

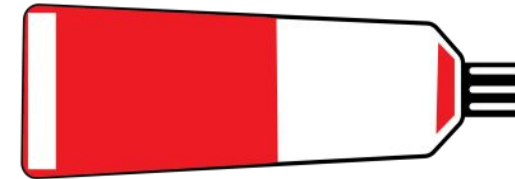
M7 100X

Winning in Ecommerce

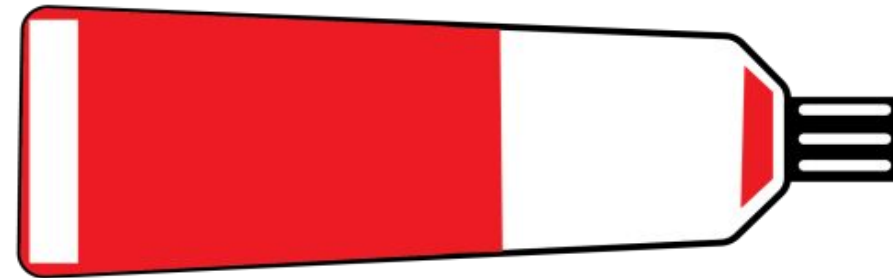


Colgate E-commerce Business

CY' 19



CY' 21



+1000
Bps gain

Colgate E-commerce SOM

Digital Recognition



Gold

Best Use of Branded Content
Smile Karo Aur Shuru Ho Jayo - Equity campaign.

ET – Digiplus Awards 21



Gold

Best Use of Integrated Strategy
Succeeding as a beauty essential, not a toothpaste- VW

ET - Digiplus Awards 21



Best Content in Digital Display Marketing Campaign - Gentle

Digital Dragons Awards 21



Best Innovation & Creativity – Colgate Gentle

Mint Marketing Awards 21



Disruptive Launch
Colgate Gentle

Exchange4Media



Gold

Best Use of Video Smile Karo Aur Shuru Ho Jayo - Equity campaign.

Indian Digital Awards 21



Silver

Best use of Content Marketing
Smile Karo Aur Shuru Ho Jayo - Equity campaign.

Indian Digital Awards 21



Bronze

Best use of YouTube Succeeding as a beauty essential, not as a toothpaste- VW Campaign

Indian Digital Awards 21



Bronze

Best use of Integrated Strategy Succeeding as a beauty essential, not as a toothpaste- VW Campaign

ET Media Strategy Awards 21

Our strategic framework

Winning
with brand



Leading
Innovation



Digital
Acceleration



**Driving
Profitable
Growth**



**Strengthening
Go-To-Market**



Digital Transformation of Go-to-Market



**Building
Retailer
DigiLoyalty**



**GROWTH
Initiatives**



**A.I led
Store level
Assortment**



**Digitizing
Distributor
Operations**

Strengthening our Rural Presence

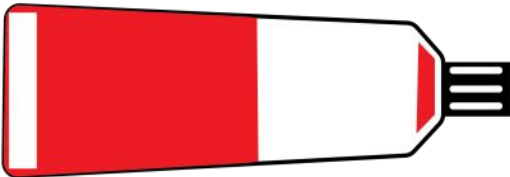


Continued expansion with **Muskaan** program

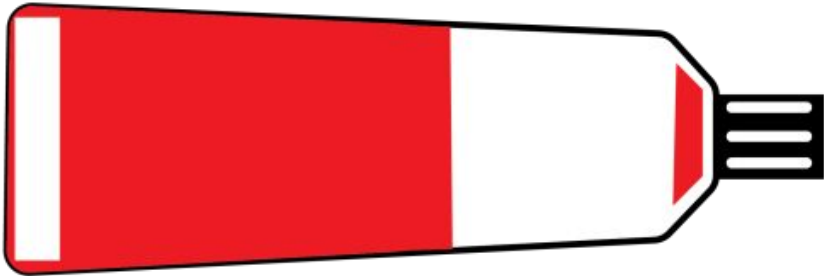
Winning in Modern Trade



CY 19



CY 21



+70
Bps gain

Winning with Profession



#1

**Prescribed Brand
by Dentists**



ida
Indian Dental Association

**Strong Partnerships with
Key Bodies**

Our strategic framework

Winning
with brand



Leading
Innovation



Digital
Acceleration



Strengthening
Go-To-Market



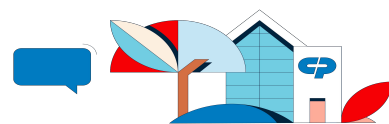
**Driving
Profitable
Growth**



Reimagining a
healthier future



SMILE Strategy - Taking ESG efforts ahead



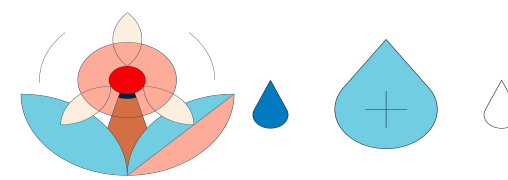
Driving

Social Impact



Helping
4

MILlions of Homes

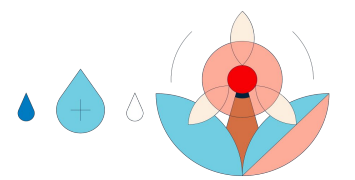


Preserving our

Environment

Watch out for our ESG report, this June 2022!

Making our planet smile



Preserving our

Environment



Enabling Smiles & Empowering Women



Social Impact



Seva Mandir



275 Cleft surgeries done FY-22
To reach 1000 children in CY 2022-23



Digital & Financial Literacy for
12,000 rural women in CY 2022-23

Scaling impact - water programs



Seva Mandir



Water Augmentation for rural Livelihoods in Rajasthan

228 Million Litres Water Replenished

43000 people benefited

Efforts moved from 45 to 77 villages



Water accessibility in rural Maharashtra



Social Impact

Empowering Youth



Social Impact

Keep India Smiling Scholarship Program



1650+ KIS scholars

Corporate Governance



Asian Centre for Corporate
Governance & Sustainability
Australia China Hongkong India
Indonesia Japan Malaysia
Philippines SAARC
Singapore Thailand

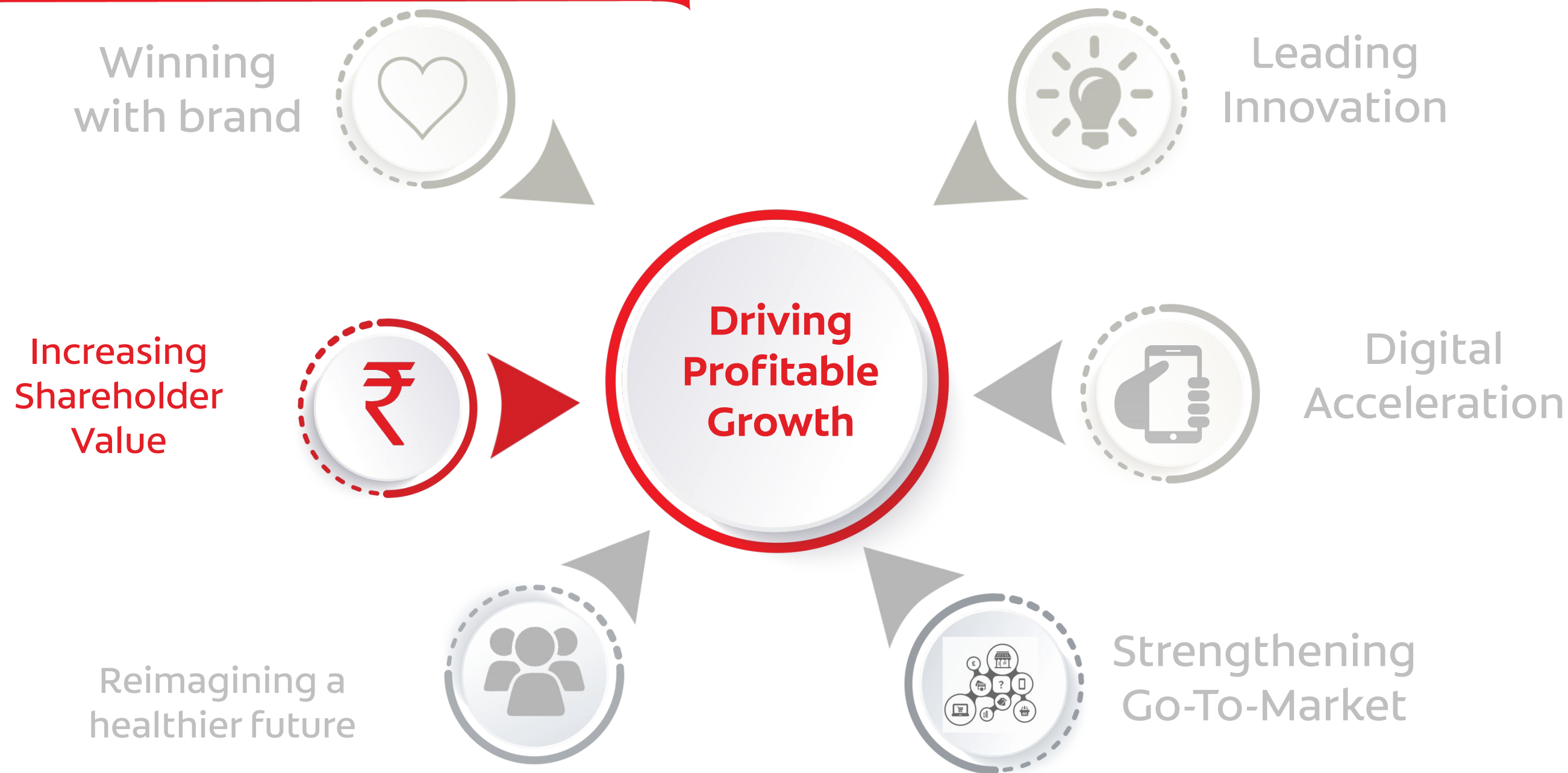


Best Audit Committee Award Asian Centre's Corporate Governance Awards



Governance

Our strategic framework



Financial Strategy

Sales/Volume



Margin



Non-variable
Overhead



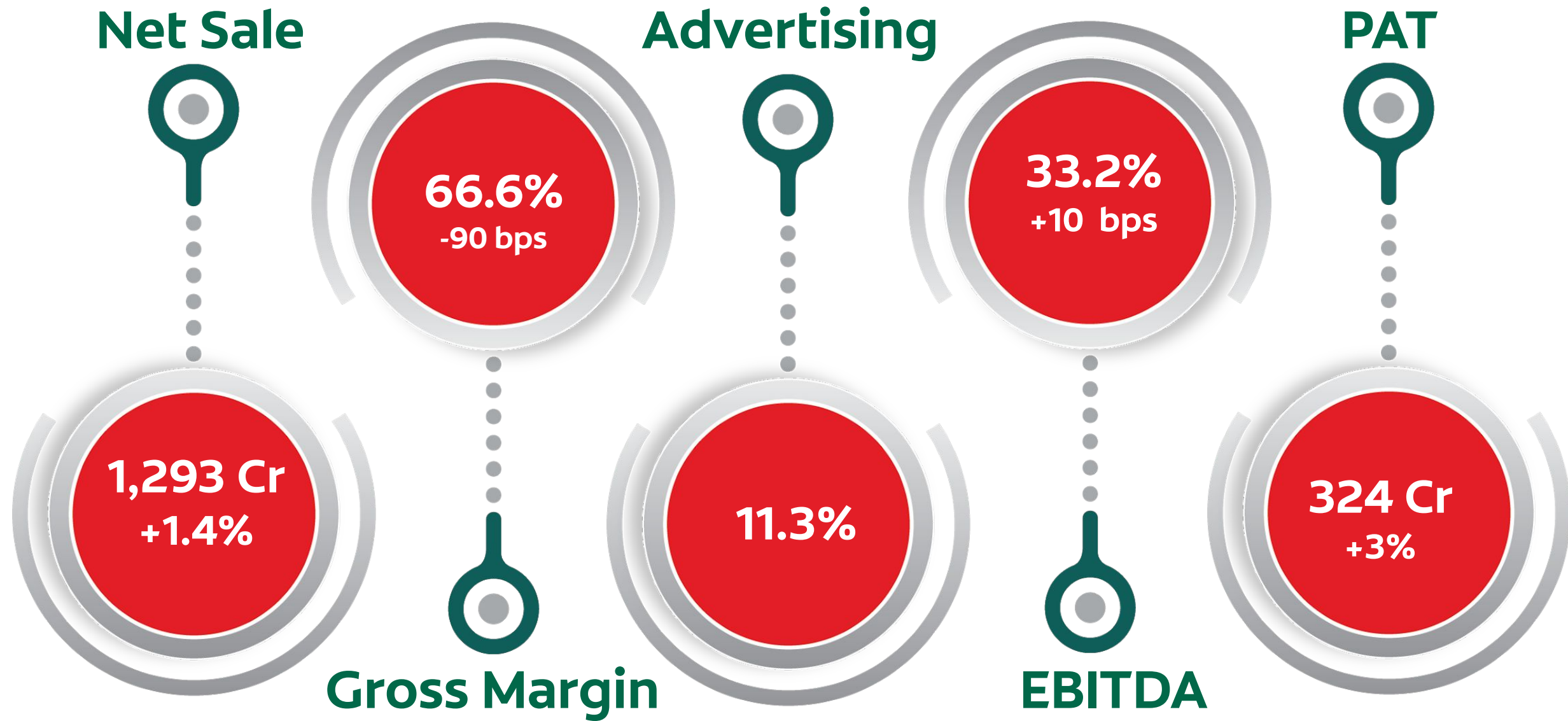
Advertising



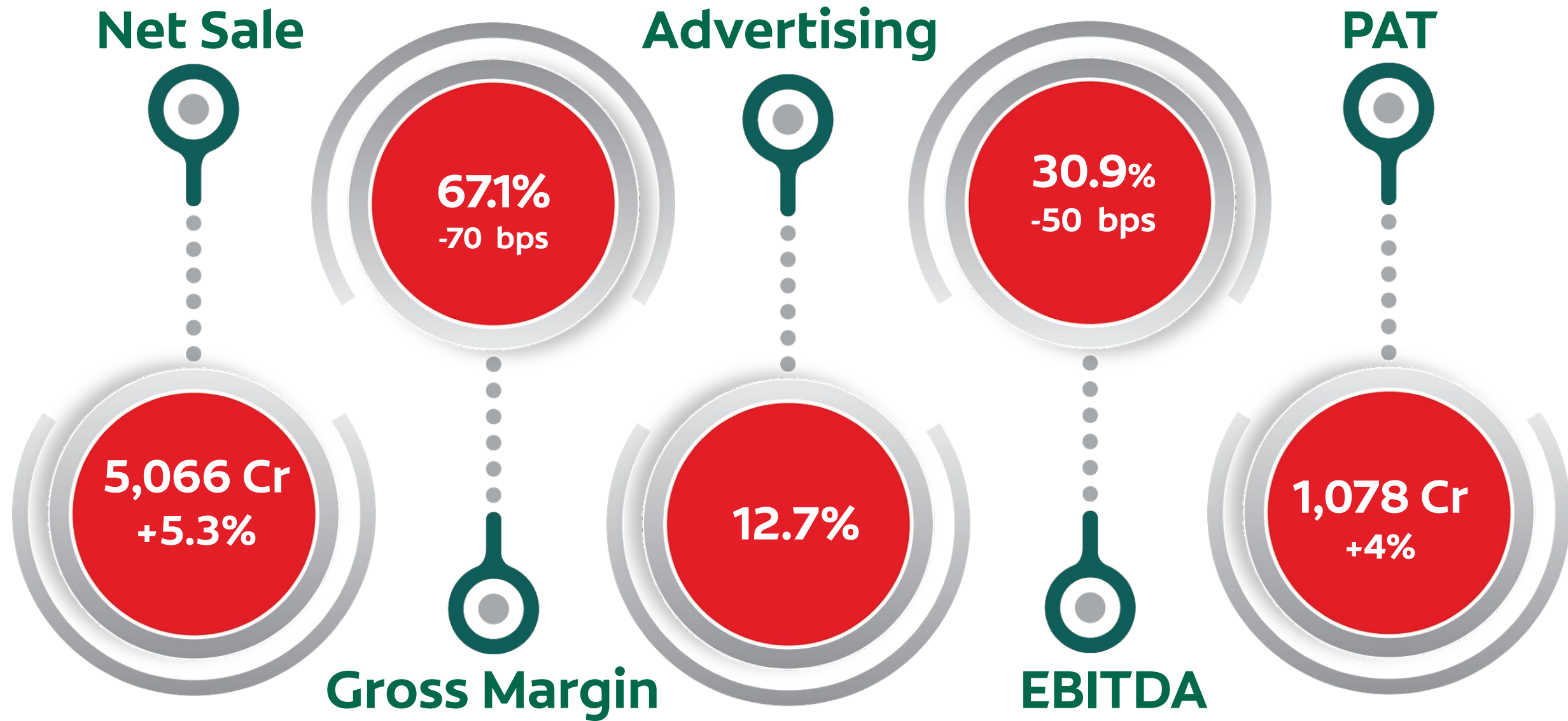
Operating Profit



Q4 2021-22



FY 2021-22



Driving Revenue Growth Management Mindset



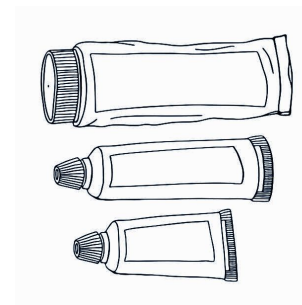
Pricing



Promotion
Depth



Mix

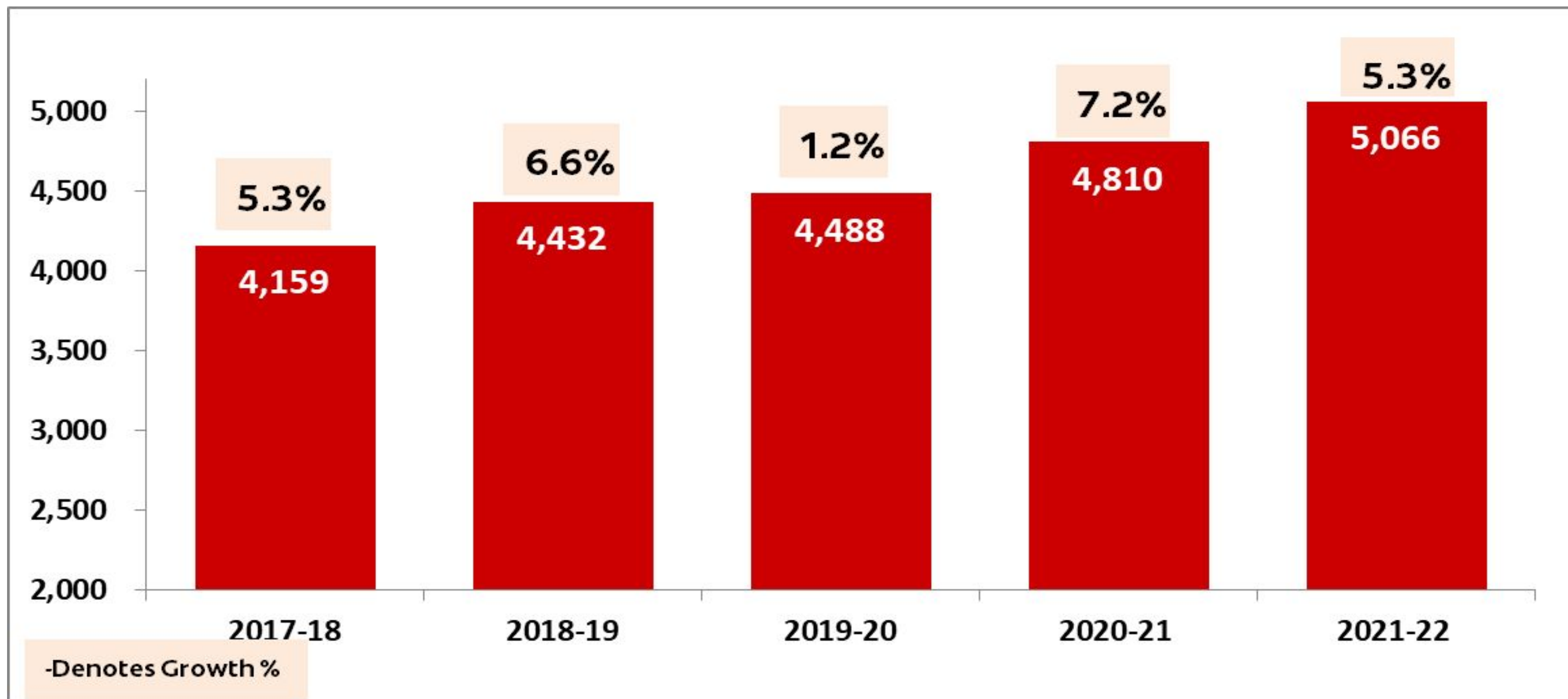


Pack Size

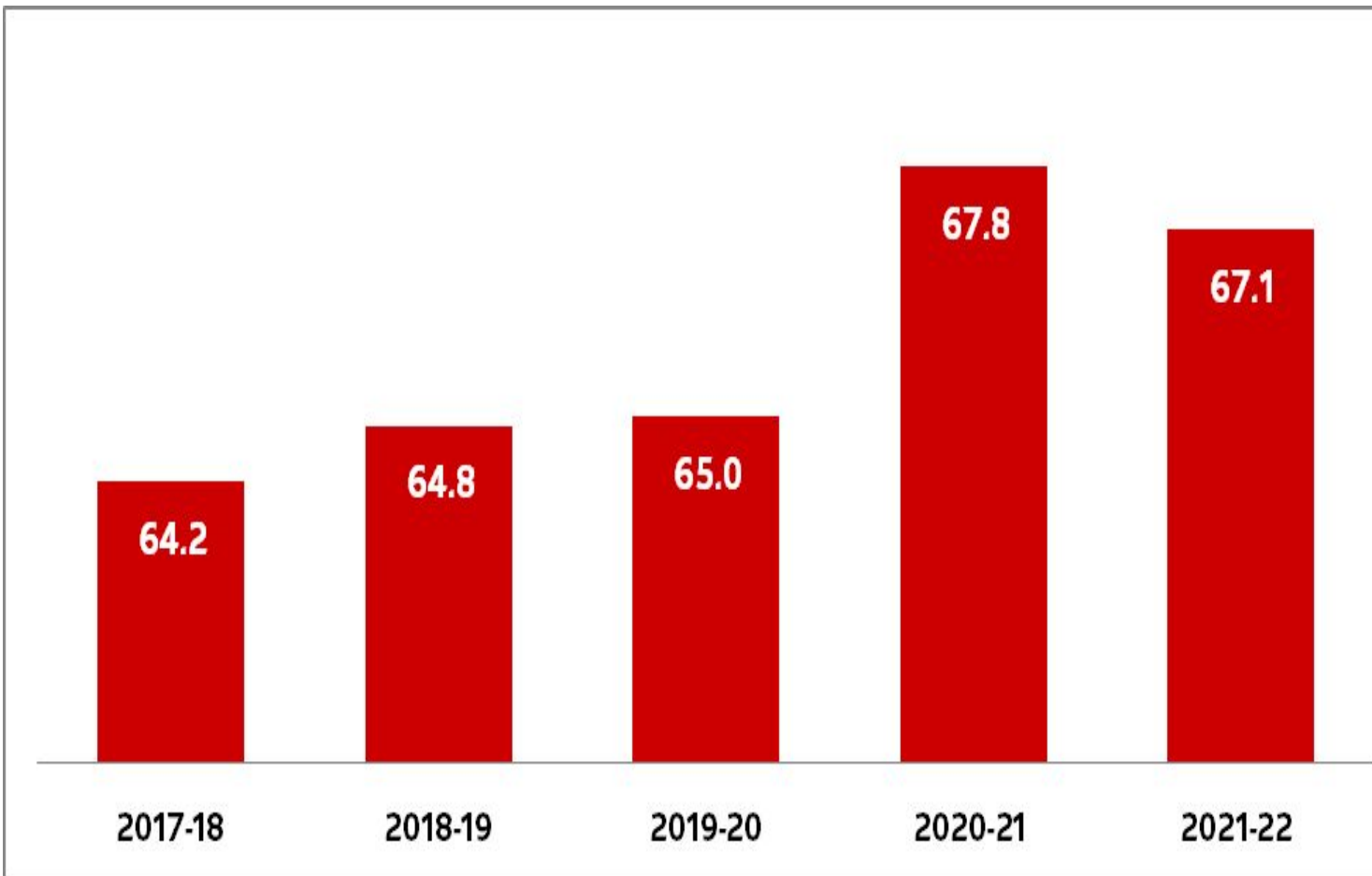


New
Products

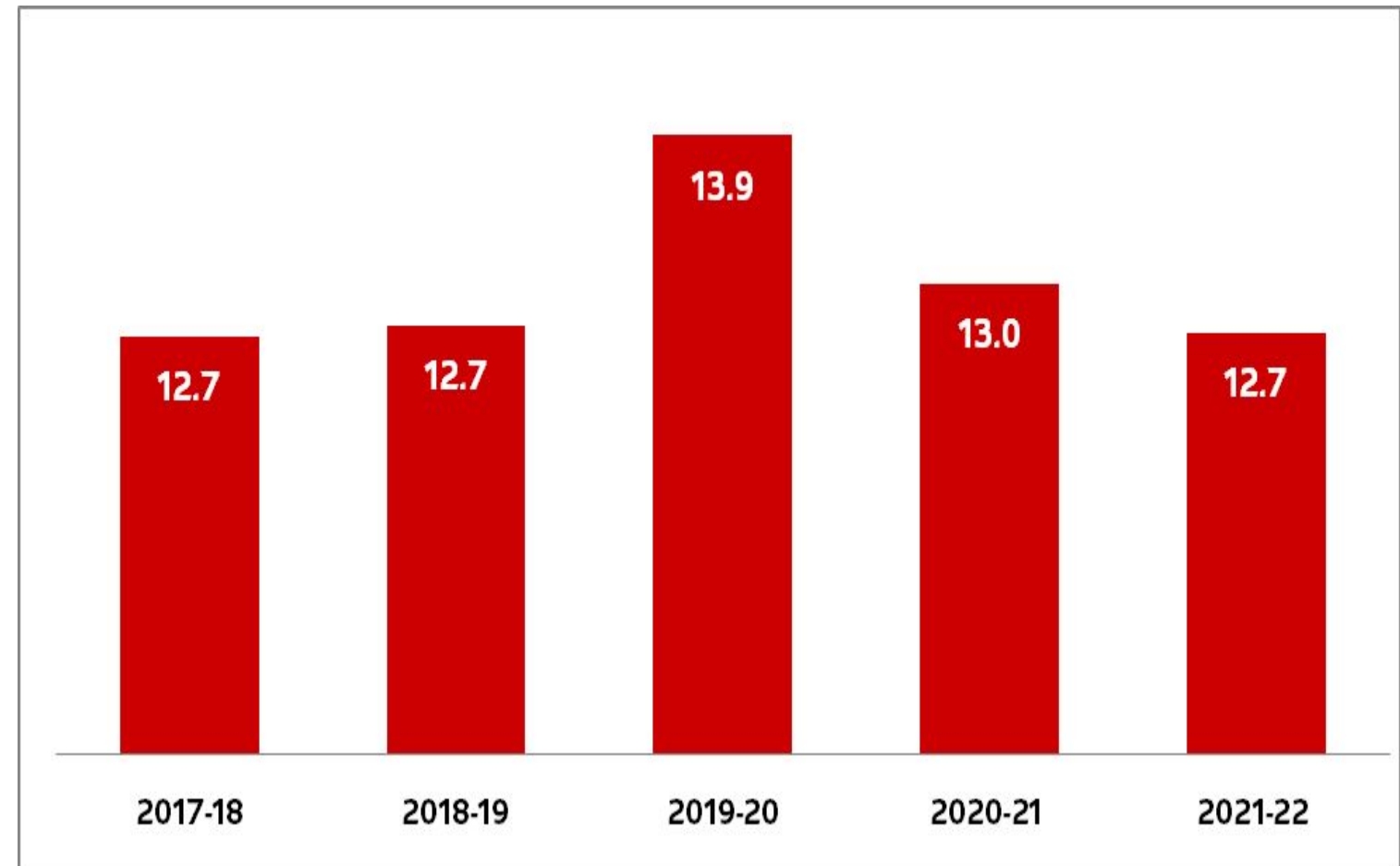
Net Sales Trend



Gross Margins & Advertising

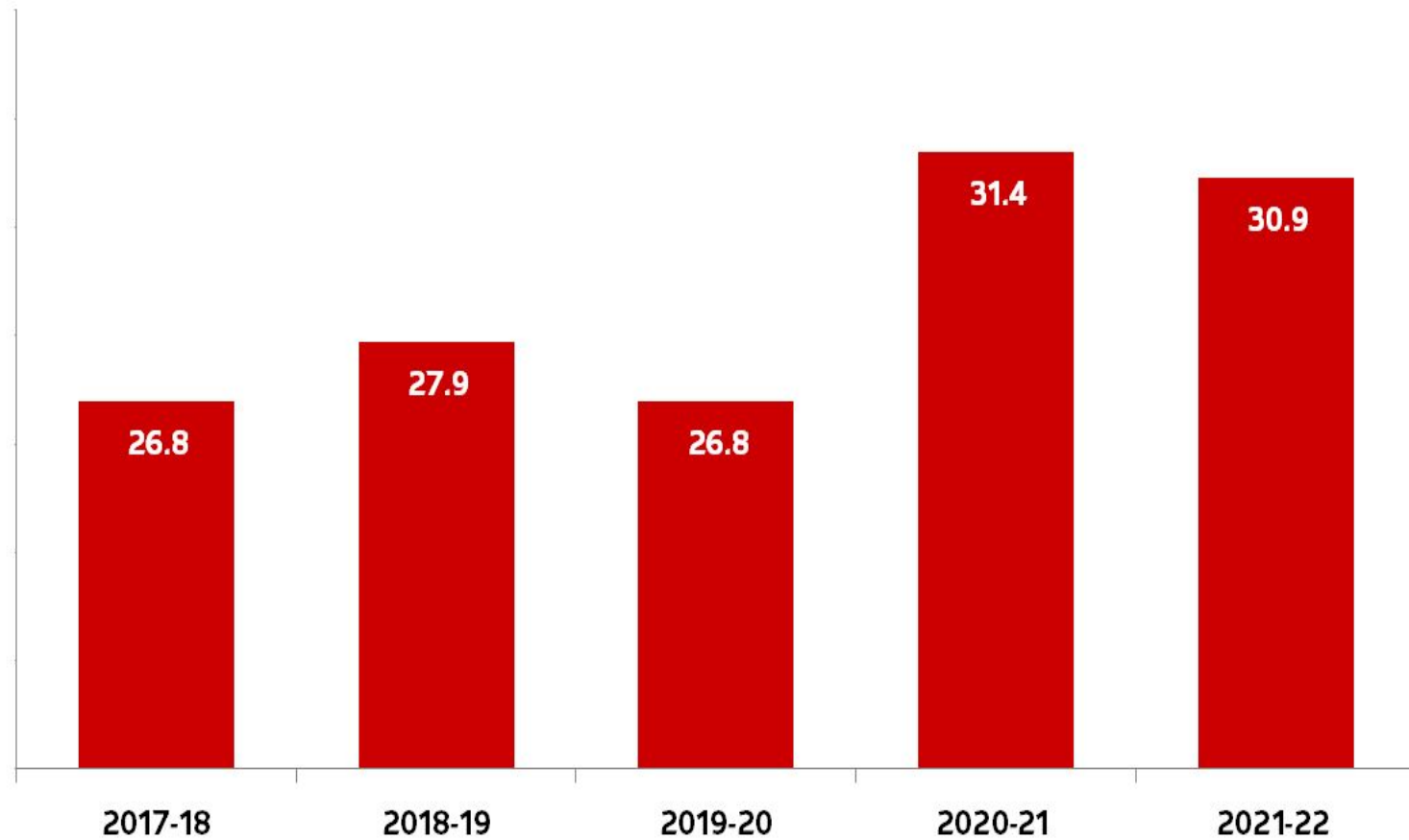


Gross Margins %

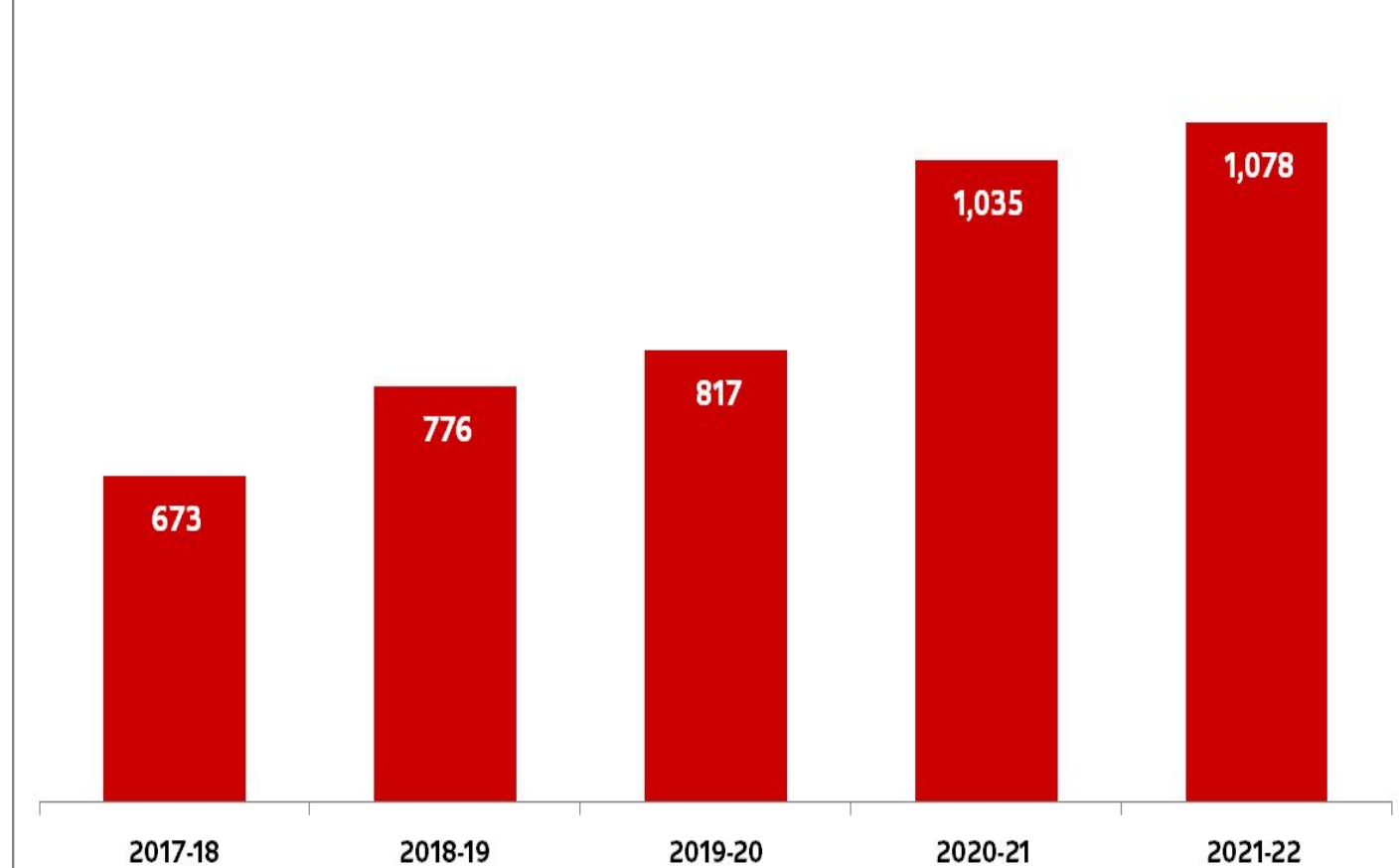


Advertising %

EBITDA & PAT

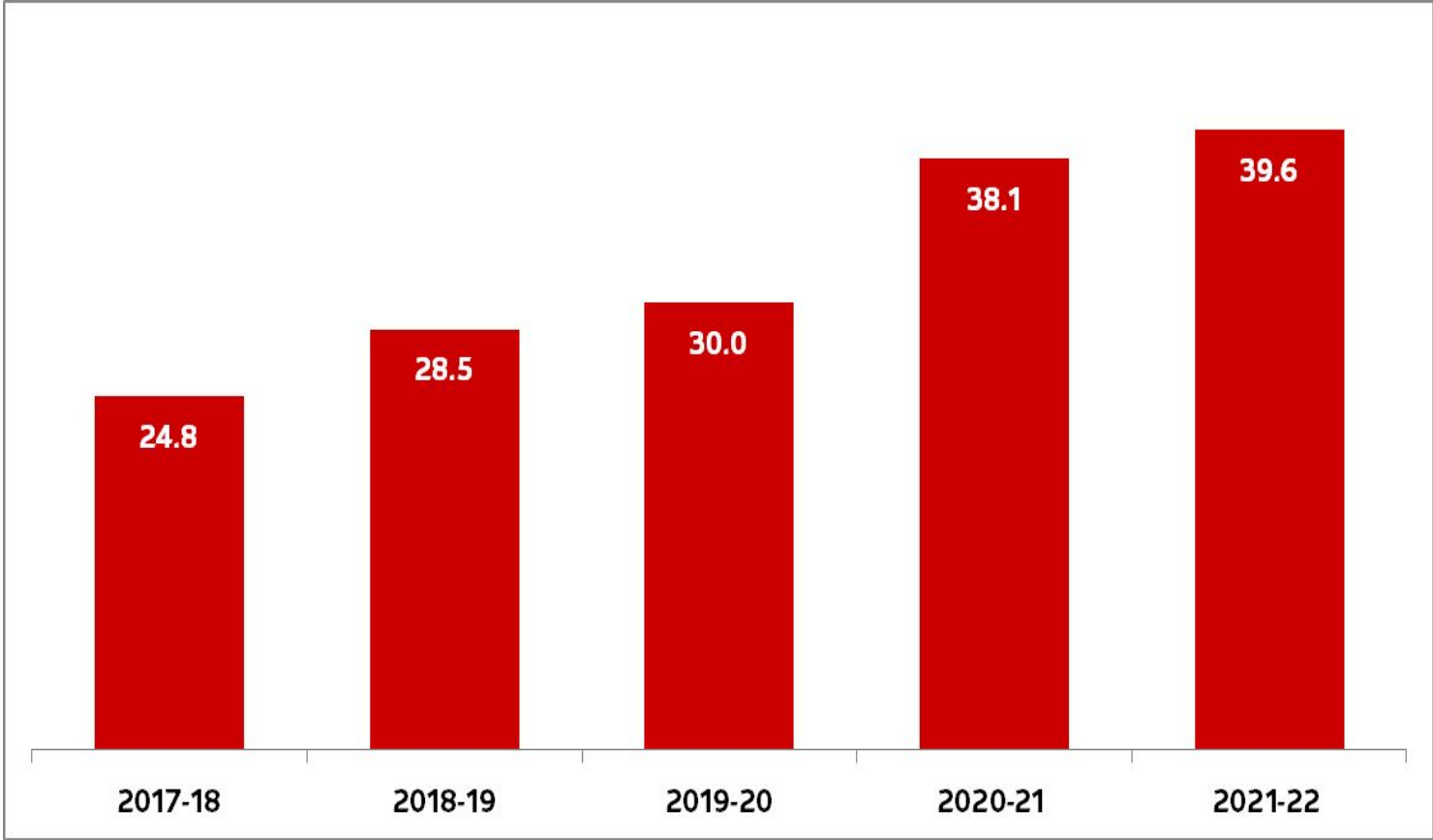


EBITDA %

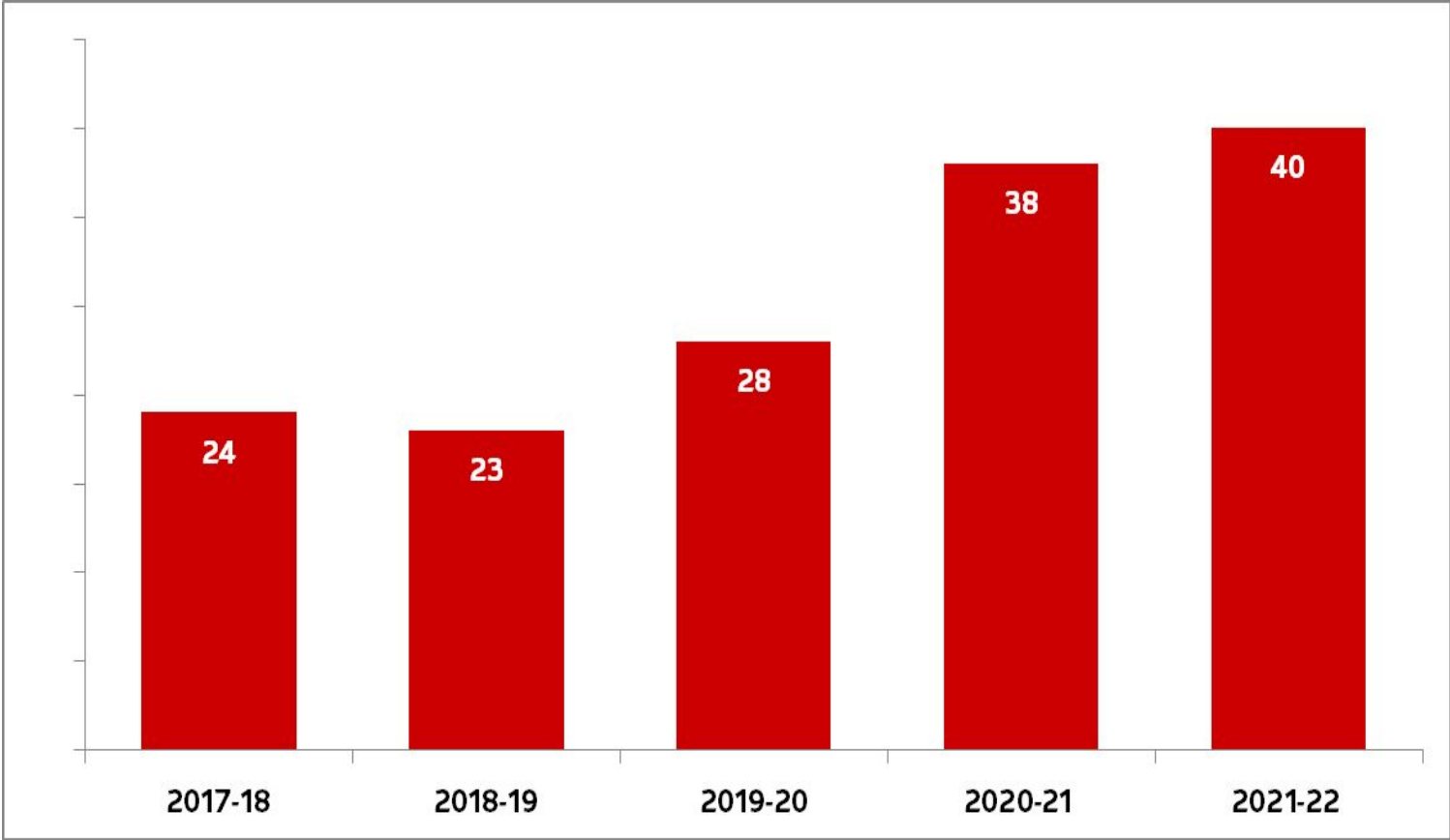


PAT

EPS & DPS



EPS



DPS



Smile karo aur shuru ho jao

PALMOLIVE

Say Yes
To You!

Colgate[®]



QnA

