

Godrej Consumer Products Ltd.
Regd. Office: Godrej One,
4th Floor, Pirojshanagar,
Eastern Express Highway,
Vikhroli (E), Mumbai - 400 079, India.
Tel : +91-22-2518 8010/8020/8030
Fax : +91-22-2518 8040
Website : www.godrejcp.com

CIN : L24246MH2000PLC129806

August 19, 2016

The Bombay Stock Exchange Limited

Corporate Relations Department
1st Floor, Rotunda Bldg., P.J. Towers, Dalal Street,
Mumbai 400 023.

The National Stock Exchange of India Ltd

Exchange Plaza, 4th Floor,
Bandra-Kurla Complex, Mumbai 400 050

Scrip Code : 532424

**Fax Nos : 22723121/ 22722037 /
22722041/ 22722061/
22722039 /2272 3719**

Fax No 26598237/38

Dear Sirs,

Sub: Presentation to Investors

We enclose herewith a presentation which is self-explanatory.

For Godrej Consumer Products Limited



**Ramesh Iyer
Dy Company Secretary**





GCPL AFRICA

August 2016

Disclaimer

This release / communication, except for the historical information, may contain statements, including the words or phrases such as 'expects, anticipates, intends, will, would, undertakes, aims, estimates, contemplates, seeks to, objective, goal, projects, should' and similar expressions or variations of these expressions or negatives of these terms indicating future performance or results, financial or otherwise, which are forward looking statements. These forward looking statements are based on certain expectations, assumptions, anticipated developments and other factors which are not limited to risk and uncertainties regarding fluctuations in earnings, market growth, intense competition and the pricing environment in the market, consumption level, ability to maintain and manage key customer relationship and supply chain sources and those factors which may affect our ability to implement business strategies successfully, namely changes in regulatory environments in India and overseas, political instability, change in international oil prices and input costs and new or changed priorities of the trade. The Company, therefore, cannot guarantee that the forward looking statements made herein shall be realised. The Company, based on changes as stated above, may alter, amend, modify or make necessary corrective changes in any manner to any such forward looking statement contained herein or make written or oral forward looking statements as may be required from time to time on the basis of subsequent developments and events. The Company does not undertake any obligation to update forward looking statements that may be made from time to time by or on behalf of the Company to reflect the events or circumstances after the date hereof.

Overview

- Dry Hair Extensions
- Wet Hair Care
- Household Insecticides

GCPL Africa

Dry Hair Extensions

Types of dry hair extensions

Braids



Weaves



Dreads



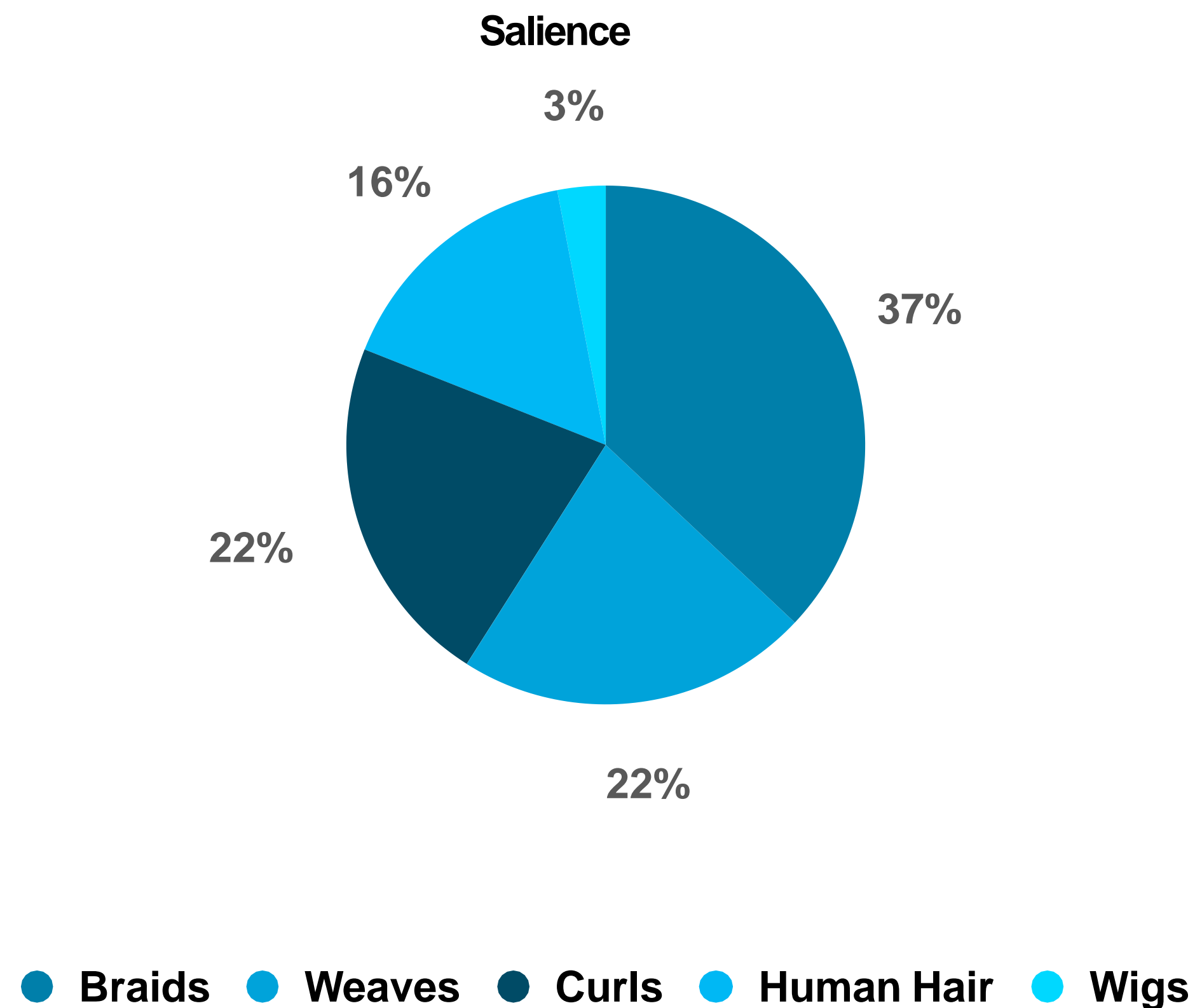
Wigs



**Ponytail
Drawstrings**



Dry Hair Extensions market overview



*Source: Internal assumption based on size of female population, penetration and usage frequency

Deep Dive – GCPL Dry Hair Extensions



DARLING®
PASSION FOR HAIR

Culture

Trendsetting



NESCAFÉ



Femininity

African beauty

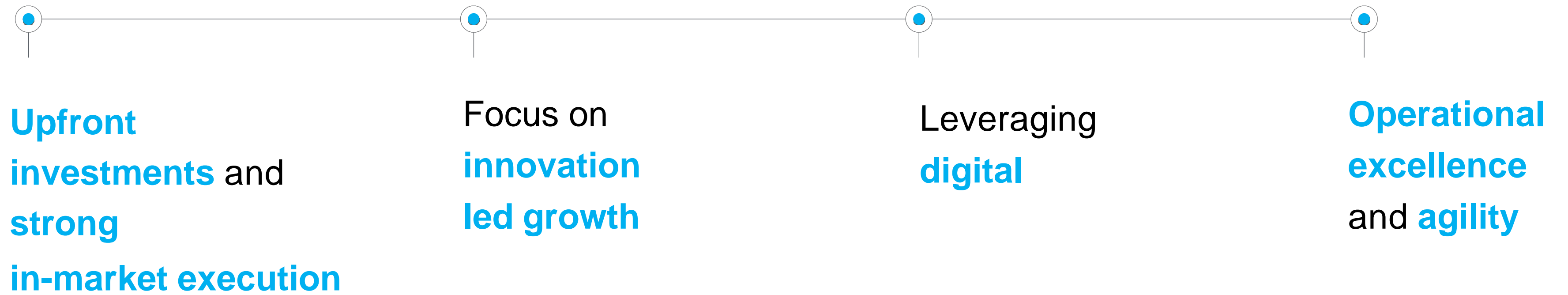
Fashion

Leading pan-African brand with a **strong, trusted heritage**
and deep understanding of ethnic hairculture

Used by over **100 million** African consumers

**How did we
do it?**





Upfront investments and strong in-market execution

Fashion inspiration



- Brand exposure to over 6 major media incl. influencers and consumers: +1000 people in 4 days
- R1.2m free media coverage (PR)

OBJECTIVE:

Build mega brand effect and credible fashion inspiration

Trade Support



- Quarterly promos in +200 traditional retailers nationwide
- Activations create hype to engage with consumers and stylists

OBJECTIVE:

Create brand awareness and drive sales

Salon Engagement



- 600+ stylists upskilled and empowered in workshops
- Branded salons

OBJECTIVE:

Build professional advocacy

Brand Building



- Branded 450 salons in Gauteng and KZN
- Branded taxis and delivery vehicles
- Media and digital initiatives

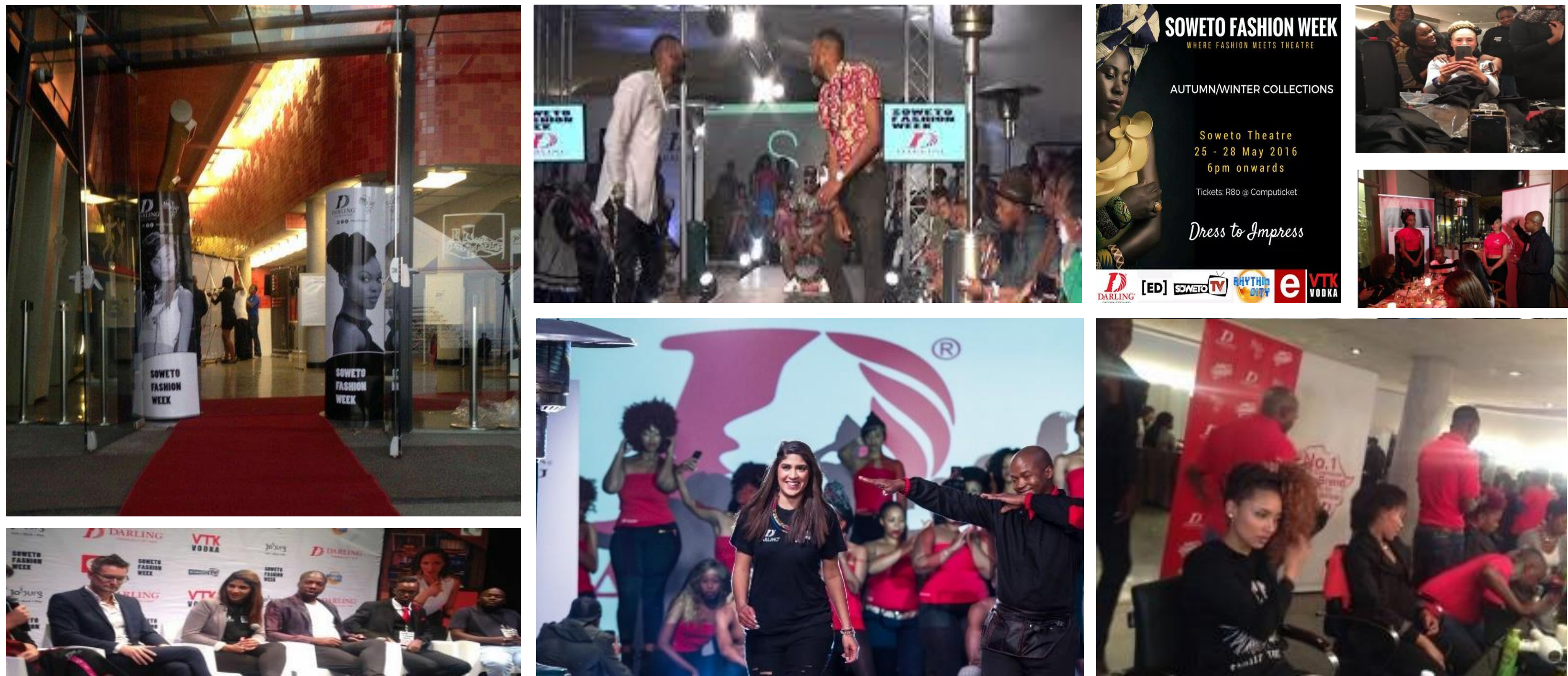
OBJECTIVE:

Build brand awareness

Upfront investments and strong in-market execution

Competitive investments in brand building

Soweto Fashion Week



Upfront investments and strong in-market execution

Competitive investments in brand building

FRIKA – fashion focussed

- Mercedes Benz Fashion Shows
- Ethnic Hair Shows
- Cape town Fashion Show
- Durban Fashion Show



Upfront investments and strong in-market execution

Innovative, cost effective mass communication and brand building

Branded truck and trailers create mobile billboards covering almost 200,000 km annually



Upfront investments and strong in-market execution

Excellence in in-store execution

In-store programmes



Upfront investments and strong in-market execution

Leading on ground consumer engagement

On ground activations – workshops, product demos



Upfront investments and strong in-market execution

Strengthening salon engagement

Academy programmes



Upfront investments and strong in-market execution

Strengthening salon engagement

Workshops and product demos



Upfront investments and strong in-market execution

Effective communication

FRIKA



FRIKA
HOT TAIL

HAIR BY FRIKA

+WAVES +CURLS +FENYTHIL
+BROWSTRESSER +HEADS +HWIGG
+HAIR DYE & ACCESSORIES

●●● www.frika.com

FRIKA



FRIKA
SALSA 14"

HAIR BY FRIKA

+WAVES +CURLS +FENYTHIL
+BROWSTRESSER +HEADS +HWIGG
+HAIR DYE & ACCESSORIES

●●● www.frika.com

FRIKA



FRIKA
LADY OF

HAIR BY FRIKA

+WAVES +CURLS +FENYTHIL
+BROWSTRESSER +HEADS +HWIGG
+HAIR DYE & ACCESSORIES

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FRIKA



FRIKA
KISS OF

HAIR BY FRIKA

+WAVES +CURLS +FENYTHIL
+BROWSTRESSER +HEADS +HWIGG
+HAIR DYE & ACCESSORIES

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FRIKA



FRIKA
HOT TAIL

HAIR BY FRIKA

+WAVES +CURLS +FENYTHIL
+BROWSTRESSER +HEADS +HWIGG
+HAIR DYE & ACCESSORIES

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FRIKA



FRIKA
WAGGLES

HAIR BY FRIKA

+WAVES +CURLS +FENYTHIL
+BROWSTRESSER +HEADS +HWIGG
+HAIR DYE & ACCESSORIES

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FRIKA



FRIKA
LUNGE

HAIR BY FRIKA

+WAVES +CURLS +FENYTHIL
+BROWSTRESSER +HEADS +HWIGG
+HAIR DYE & ACCESSORIES

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FRIKA



FRIKA
HOT TAIL

HAIR BY FRIKA

+WAVES +CURLS +FENYTHIL
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+HAIR DYE & ACCESSORIES

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Focus on innovation led growth

Focus on NPD



Michelle O



Mpume Galaxy

FRIKA Ombre



FRIKA Grey Braids



Focus on innovation led growth

Human Hair Blend

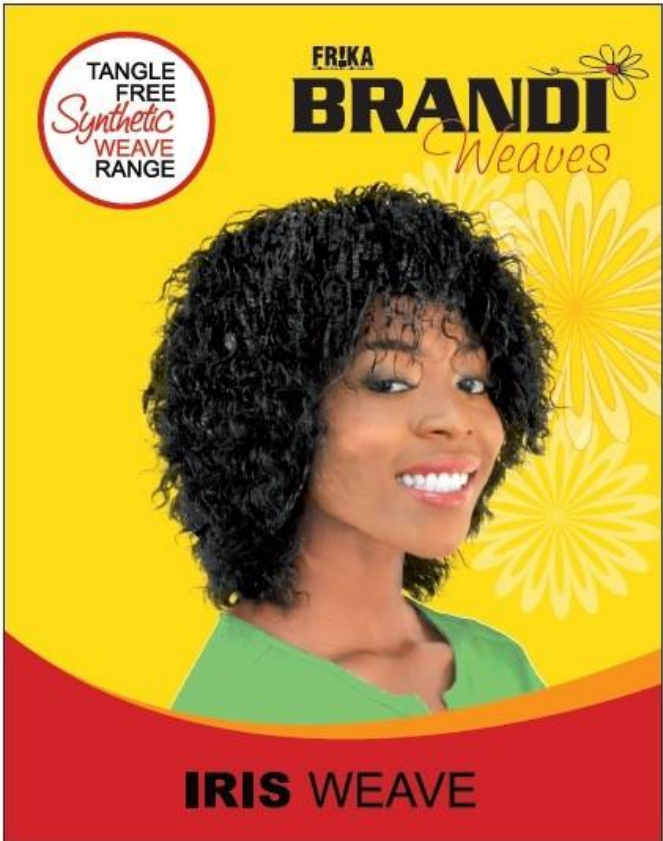


Focus on innovation led growth

Yaki Ombre Styles

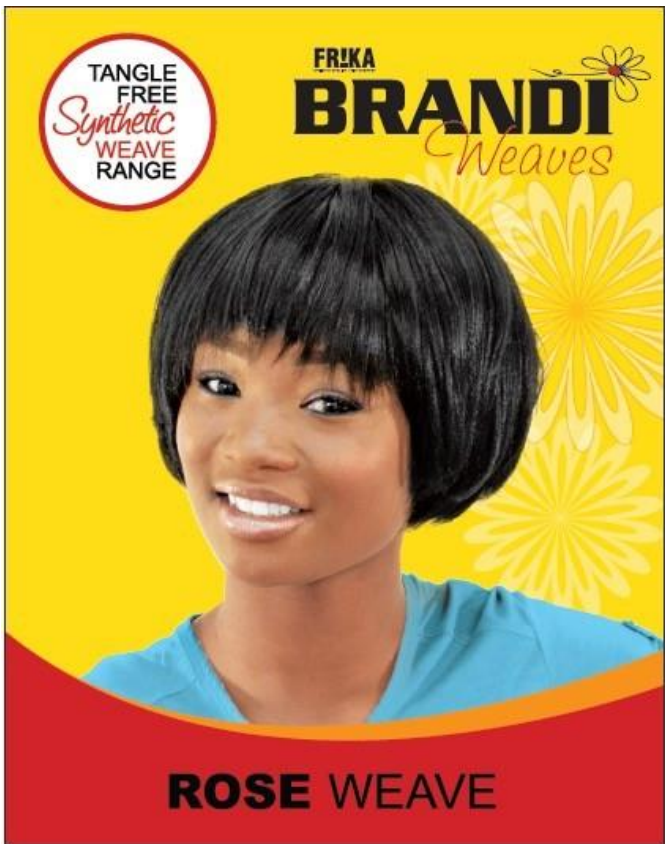


FRIKA Ombre



Iris Weave


FRIKA Grey Braids



Rose Weave

Leveraging digital

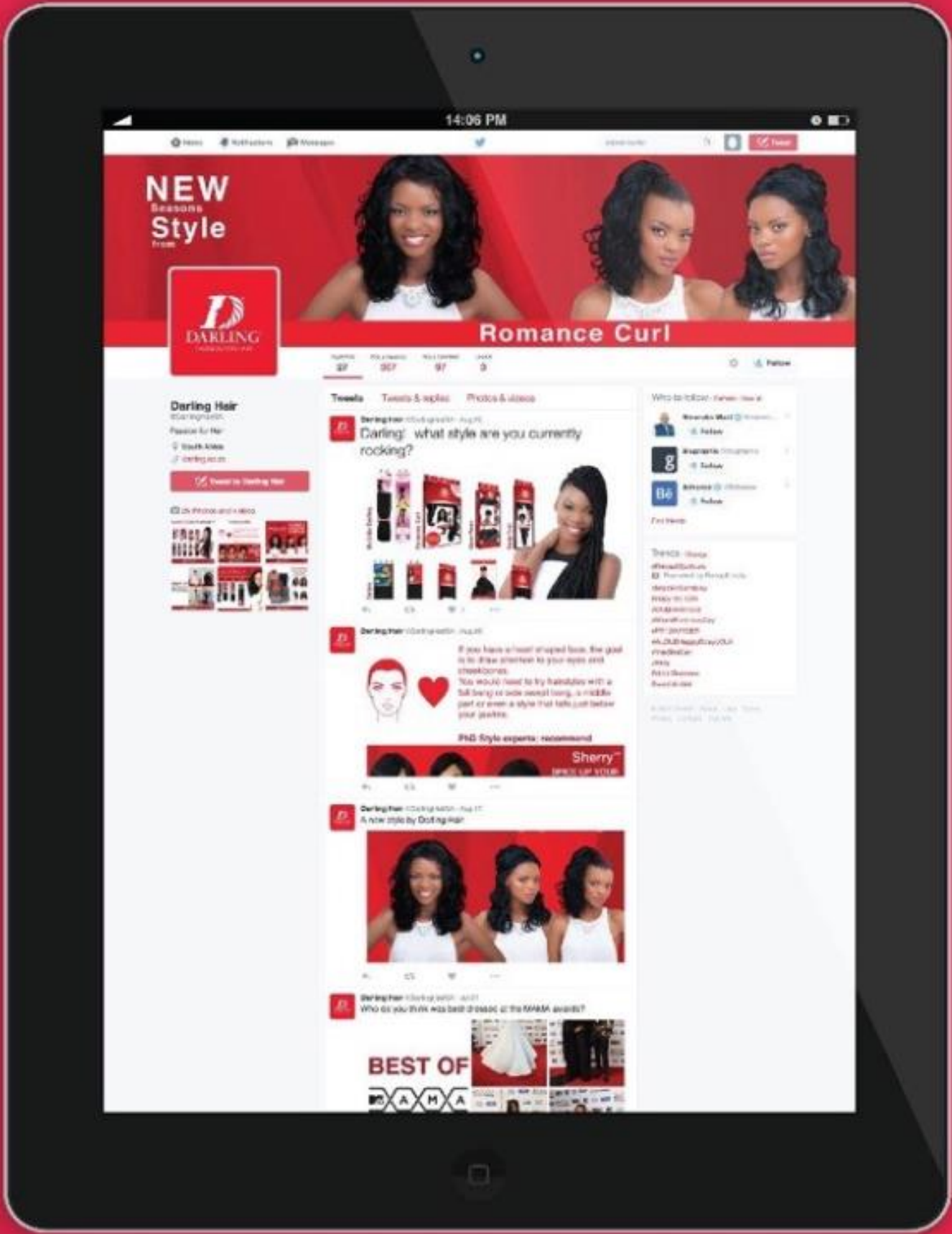
Planning your hairstyle was never this easy.



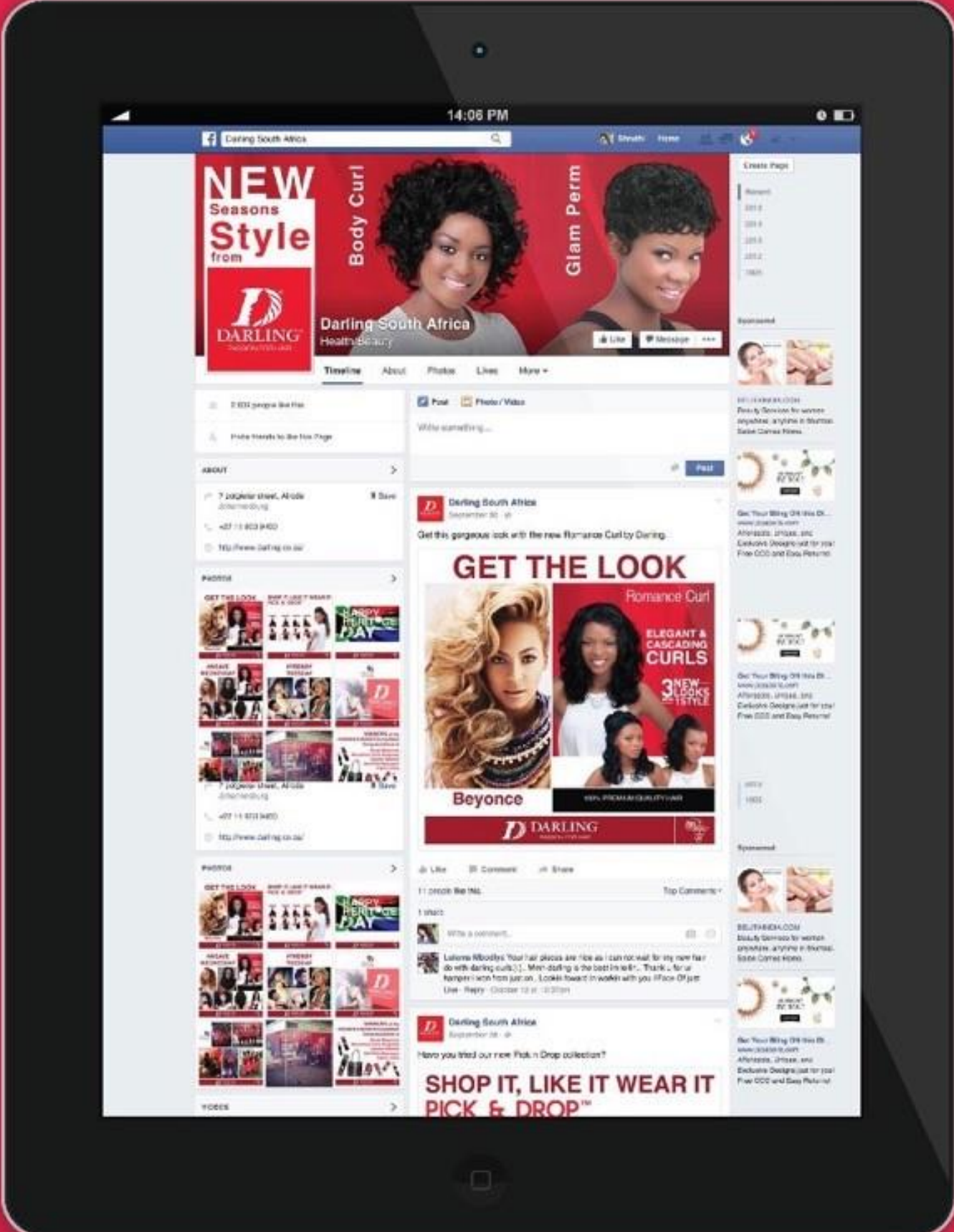
Get the app & be your own stylist!

f t

Leveraging digital



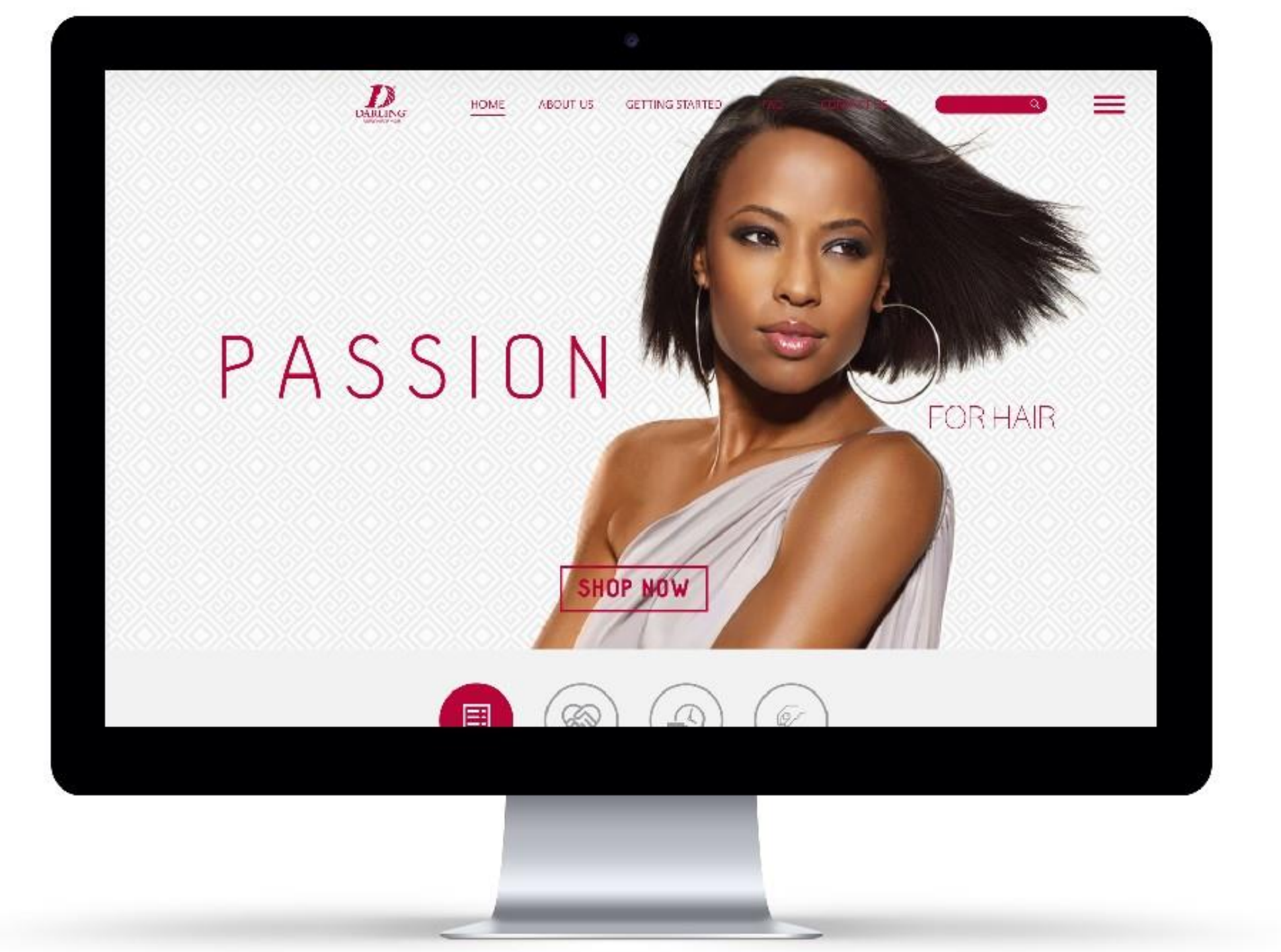
Social strategy - Twitter



Social strategy - Facebook

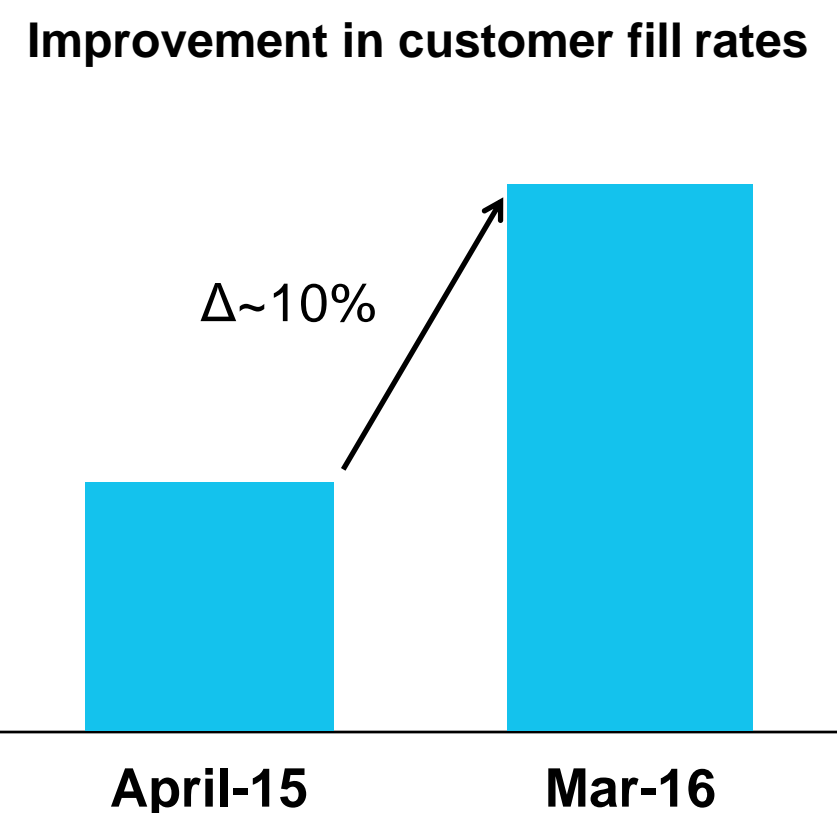
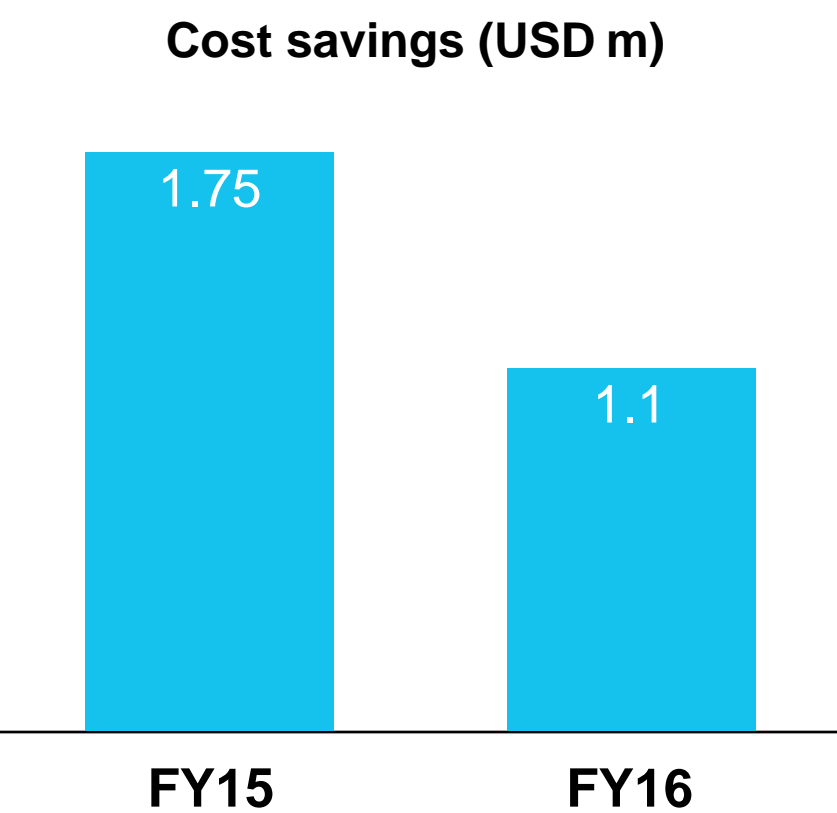
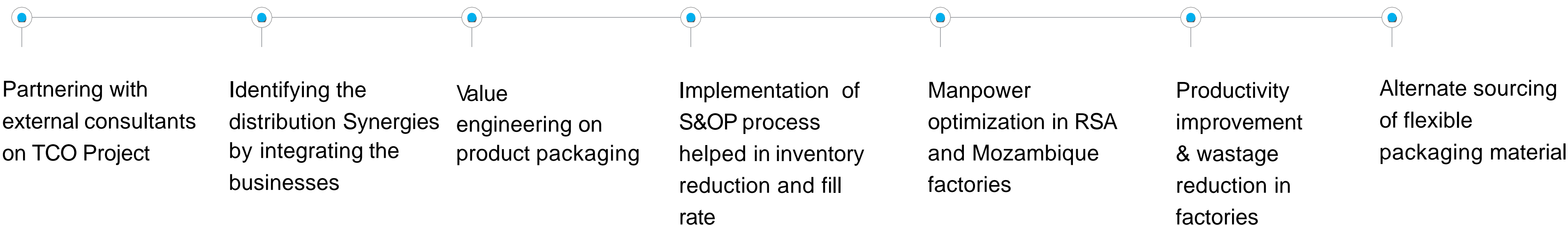
Leveraging digital

New look sneak preview




Operational excellence and agility

Making our global supply chain best-in-class



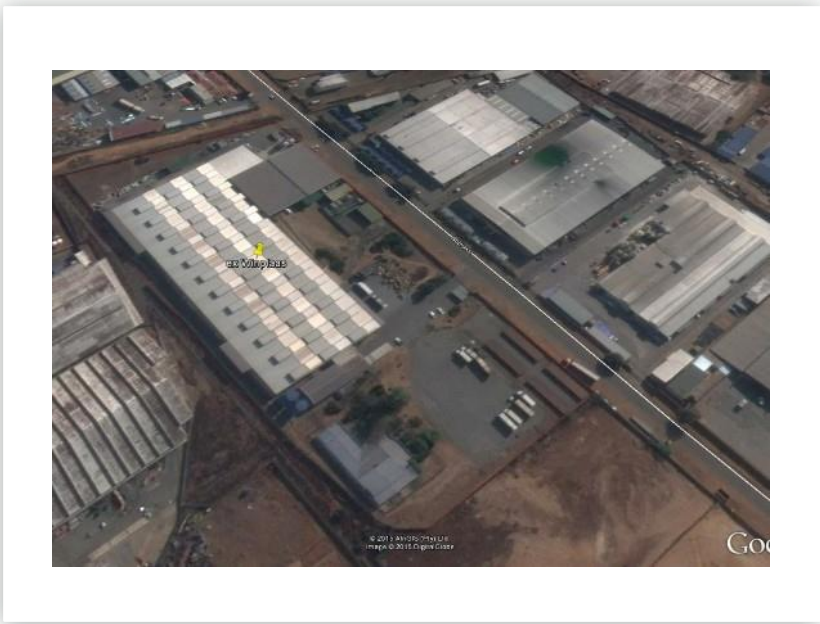
Operational excellence and agility

Backward integration

- 
- **PP fibre manufacturing facility with best in class productivity and yield per kg of PP resin**
 - **Good infrastructure for road transport and sea ports**
 - **Well connected to Sub Saharan African countries by sea**
 - **Stable source and availability of PP resin**

Operational excellence and agility

Plans to further expand capacities



GCPL Africa

Wet Hair Care

The world has about 1 billion people of African origin, predominantly located in Sub Saharan Africa, US and the Caribbean



The hair care category for women of African descent can be divided into two broad segments - Dry Hair Care and Wet Hair Care



Solution Desired

- Transform looks
- Prevent damage to hair
- Nourishment for scalp and hair



Dry Hair Care

Braids	Weaves
Value Added Categories	

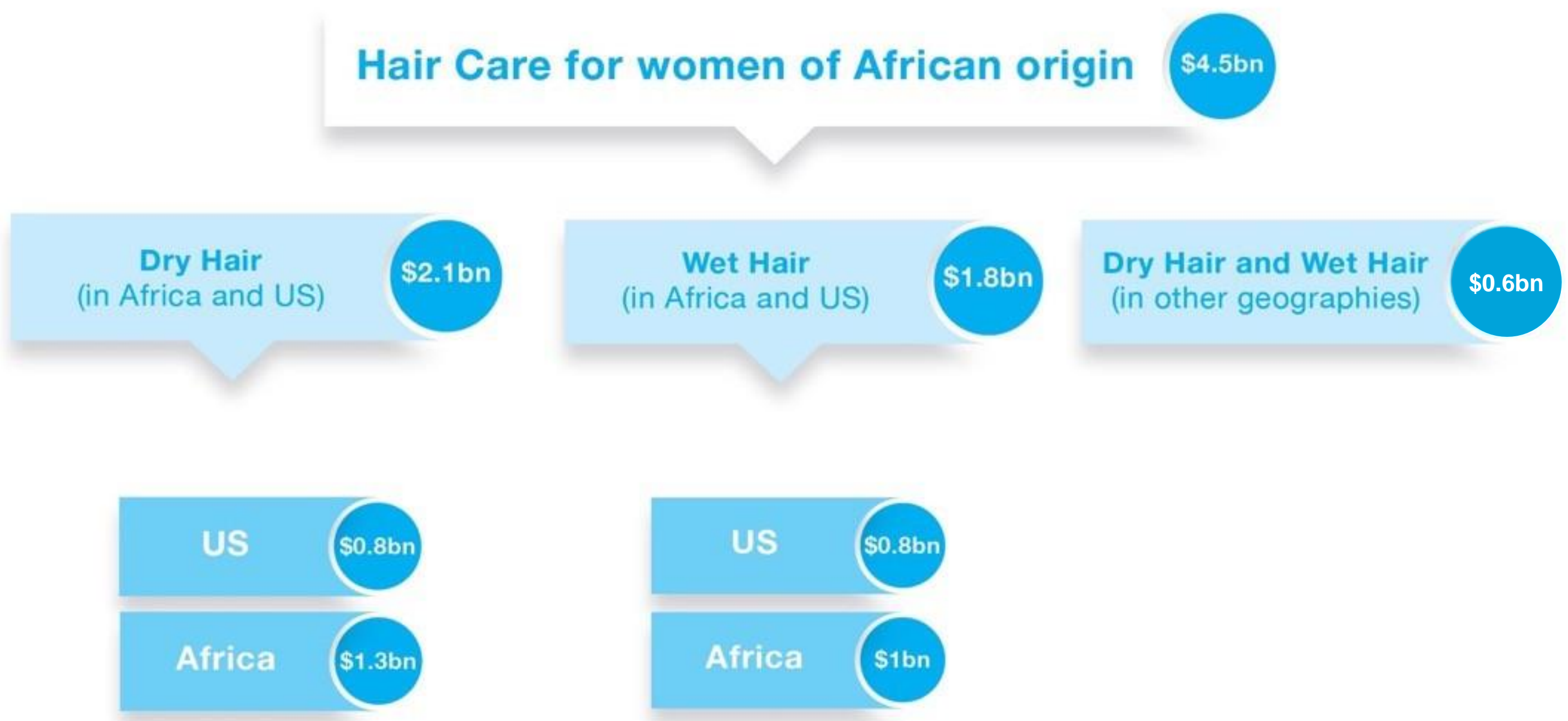


Wet Hair Care

Relaxers	Styling
Maintenance	Shampoos*

Note: *Shampoos includes only brands specifically targeted to ethnic hair

The Hair Care category for women of African origin holds significant potential - unique, fragmented, but estimated to be \$ 4.5 billion, globally



The Wet Hair Care category

Relaxers



Relaxers are used to make curly hair more manageable through chemically straightening

Styling



Styling products nurture hair and create new textures, construct shapes and provide flexible hold and shine

Maintenance



African hair, which is fragile by nature, requires extensive maintenance; maintenance products (including conditioners and special treatment) keep hair hydrated and the scalp well nourished

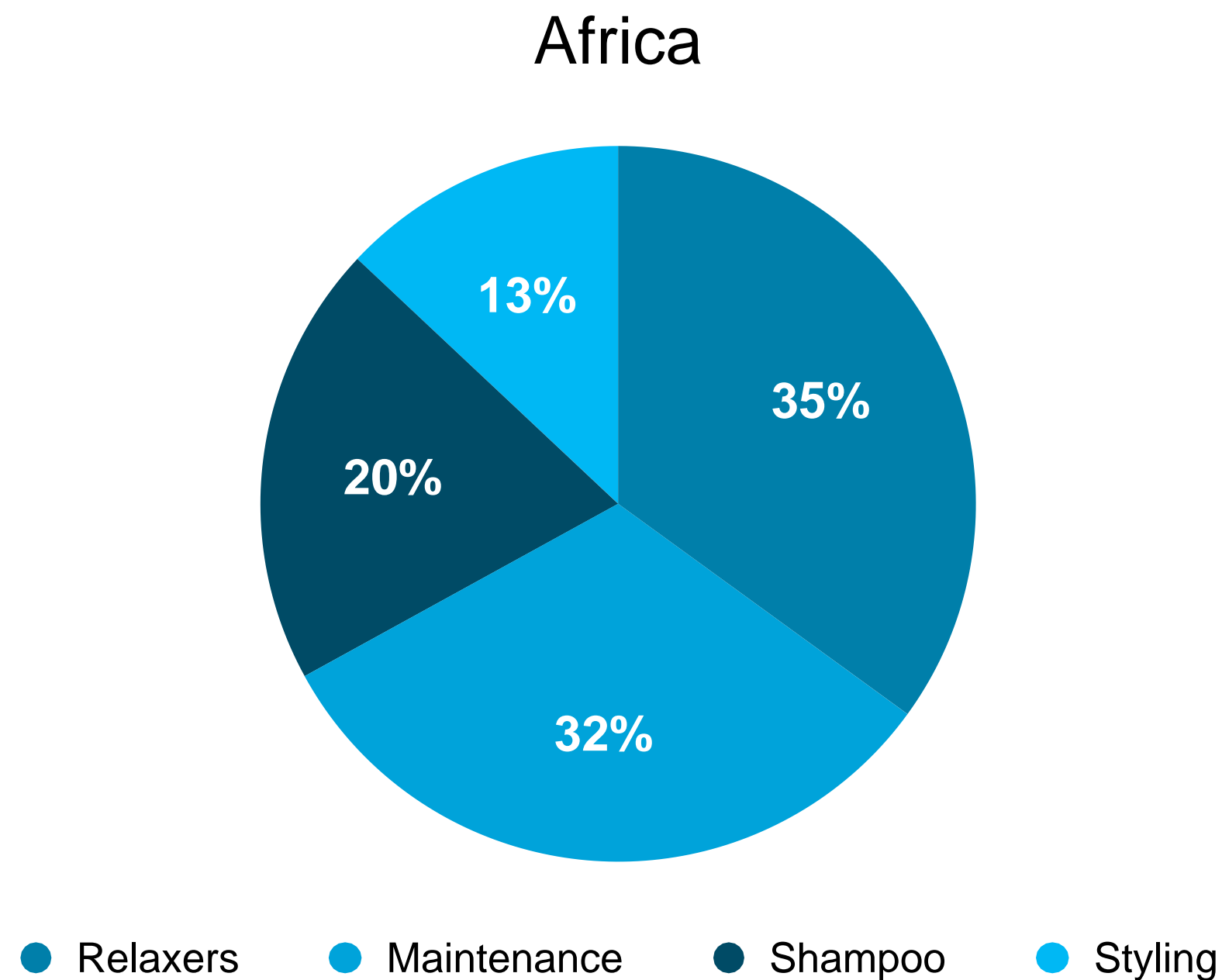
Shampoos



African women use both mainstream shampoos, as well products specifically designed for their hair

Image Source: Google Images

Relaxers and maintenance are the biggest sub categories

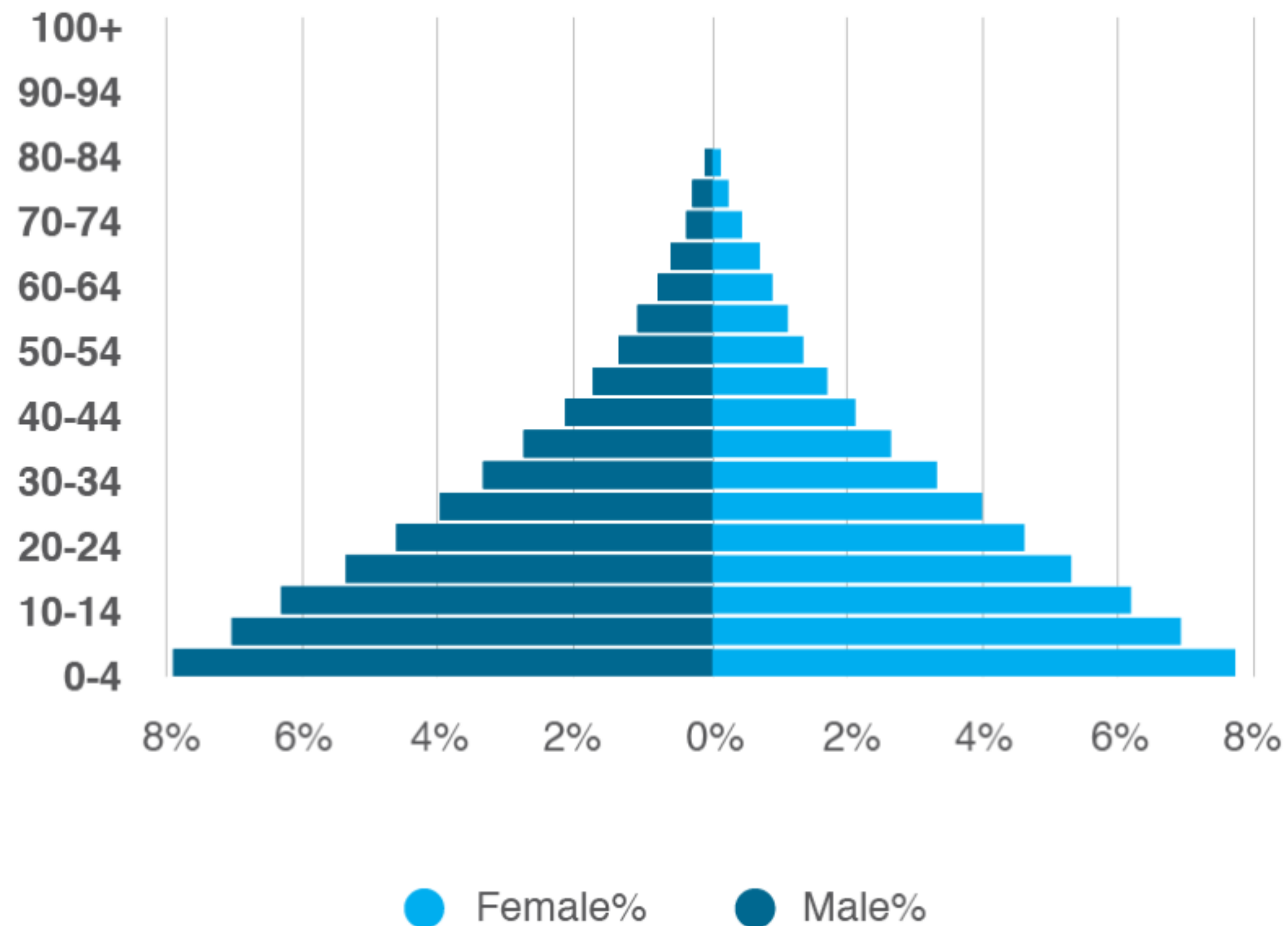


Key markets (Nigeria, Kenya, SA)
contribute to ~40% of the total category

Value/Mass segment is dominated by local players

Premium space is dominated by imported players

African consumer in getting younger and growing in size



The average age of consumer using wet hair products is steadily coming down

More consumers are coming into the category than exiting fuelling organic growth

SON portfolio gives us a wide variety of choices to adapt to African consumer



Salon brand



Premium brands



Value brand



Kids brands

GCPL Africa

Household Insecticides

The problem of pests is more serious in Sub-Saharan Africa

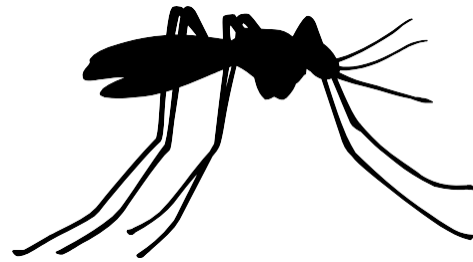
Diarrhoeal diseases & Malaria
are among top 5 killers in Africa

644,000 deaths due to Diarrhoea
568,000 deaths due to Malaria (2012)

Vs.

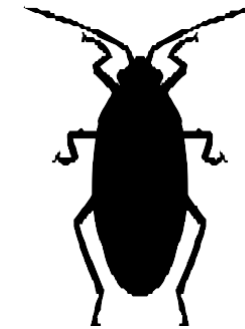
28,575 reported cases
11,313 deaths due Ebola (Oct 2015)

And their impact beyond just spreading diseases...



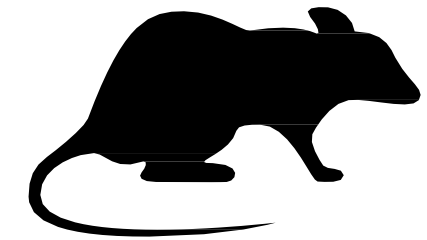
Mosquitoes

- Causes malaria and even death
- Disturb sleep & peace of mind
- Bites causes itch & allergies



Roaches

- Filthy, leave faeces everywhere, causes diseases
- Indiciate unclean house and surroundings, causes social embarrassment
- Considered most difficult to get rid off






Rats

- Causes diseases
- Destroy food, clothes & furniture
- Indicate poor living conditions leading to social embarrassment

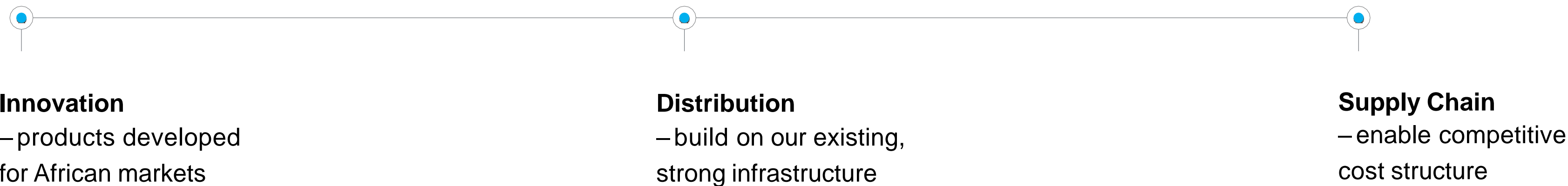
Source : U&A study, Nigeria (quantitative research)

None of existing formats solve consumers' concerns of safety and convenience

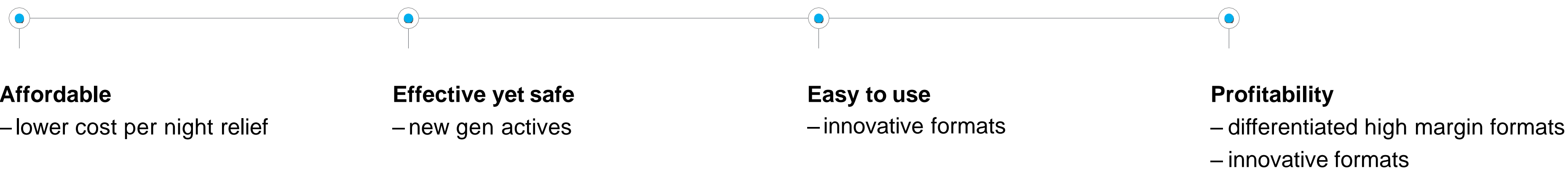
Format	Positives	Limitations	How is it used
	Instant Action	Toxic smell forcing people to stay out Cause cough, irritation Inconvenient regimen Expensive	1-2 times a week Stay out for at least 30 mins post spraying Supplemented with nets/coils
	Affordable Lasts for 8 hrs Mostly sold loose	Smoke, ash Work only against mosquitoes	In evenings – daily or once in 2 days May leave room for some time Supplemented with nets
	Distributes free/ at very low cost	Suffocating Limited coverage	

OUR HI PLANS

Drive mosquito category consumption develop and own the non mosquito market



Innovation – products developed for African markets



Distribution – build on our existing, strong infrastructure



Leverage our salon reach program
for low-cost sampling and cross-
sell

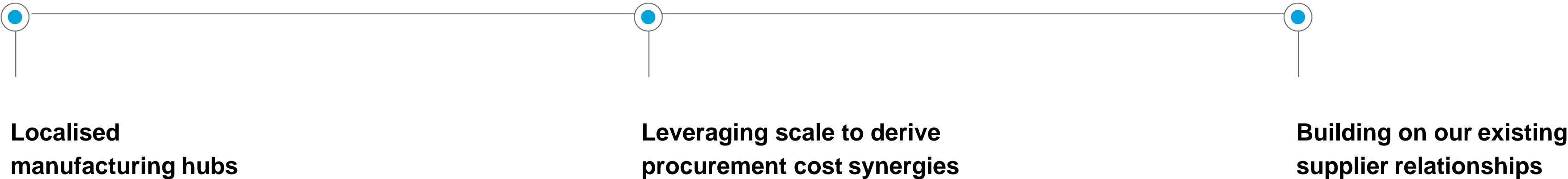


Strong in market execution



Build distribution & penetration
beyond port cities
Drive direct coverage of key trade
channels : groceries, OTC

Supply chain – enable competitive cost structure





Thank You
