Nestlé India: Investor Update

‘Enhancing quality of life and contributing to a healthier future’
This presentation may contain statements which reflect management’s current views and estimates and could be construed as forward looking statements. The forward looking statements involve certain risks and uncertainties that could cause actual results to differ materially from those contained in the forward looking statements. Potential risks and uncertainties include such factors as general economic conditions, foreign exchange fluctuations, competitive product and pricing pressures and regulatory developments. Figures are regrouped / reclassified to make them comparable. Calculations are based on non-rounded figures. ‘Analytical data’ are best estimates to facilitate understanding of business and not meant to reconcile reported figures. No unpublished price sensitive information pertaining to Nestlé India Limited and/ or Nestlé Group is intended to be shared at any of the investor meetings.

This presentation contains certain financial performance measures which are not defined by Ind AS. Management believes that these non Ind AS measures provide additional useful information to assess the financial and operational performance of the Company. Such measures may not be comparable to similar measures presented by other companies.

Figures from 2016 onwards are as per Ind AS. Effective 1 July 2017, sales and ratios derived from sales are not comparable due to change in structure of Indirect taxes.

Profit from Operations is arrived from ‘Profit before Tax’ after reducing Other Income and adding back Finance Costs (including interest cost on employee benefit plans), Net provision for contingencies (others) and corporate social responsibility expense.
Nestlé is world’s largest food and beverage company pursuing Nutrition, Health and Wellness strategy

Nestlé has been present in India for 100+ years

Iconic brands are winning with local consumers

Science and consumer based Innovation and Renovation

Creating shared value for shareholders and society

Well recognized FMCG company in India

Recalibrating for future

Strong support from Nestlé Group

Key highlights
### Nestlé Group: World’s largest food and beverage company

**Nestlé (2018)**

- **Providing Safe, Quality Nutrition** for more than 150 Years
- **Presence in 190 countries**, with 413 factories
- **CHF 285 Billion** Market Cap\(^2\)

**Where we sell (2018 Sales: CHF 91.4 Billion)\(^1\):**

- **2,000+ Brands** Worldwide
- **CHF 1.7 Billion** R&D spends
- **CHF 13.8 Billion** Operating Profit
- **CHF 15.4 Billion** Operating Cash Flow
- **Around 308,000 Employees**

### 34 Billionaire Brands

- Maggi
- Nescafé
- Nestlé
- KitKat
- Milo
- Nestlé NAN
- Nestlé Purina
- S. Pellegrino
- Perrier
- Purina Beneful
- Nesquik
- Galderma
- Dog Chow
- Vinlu

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**Note:**

1) EMENA: Europe, Middle East and North Africa; AMS: Americas; AOA: Asia, Oceania and sub-Saharan Africa.

2) As on March 11, 2019
R&D drives innovation and Nutrition, Health & Wellness journey

- **31 R&D Centres across 5 Continents**
- **~2,400 Patent Families**
- **Investment of CHF 1.7 Billion per year**
- **~5,000 Strong Team**

Locations:
- Lausanne-Switzerland
- York-UK
- Dongguan-China
- Marysville-US
- Konolfingen-Switzerland
- Abidjan-Africa
- Manesar-India
Nestlé India: Largest listed pure-play F&B company in India

Nestlé India (2018)

- Providing Safe, Quality Nutrition for More than 106 Years in India
- 90,000+ Shareholders
- INR 992 Billion Market cap
- INR 112 Billion Sales
- INR 21 Billion Operating Cash Flow
- INR 31 Billion Contribution to exchequer
- 8 Factories
- ~8,000 Employees
- INR 24 Billion Operating Profit
- INR 21 Billion Operating Cash Flow

Diversified portfolio of Brands

- Milk Products and Nutrition
  - Cerealac
  - LACTOGEN
  - Every Day
  - NAN
  - Milkmaid
  - Nestlé
  - Nestum
  - Nestlé Health Science

- Prepared Dishes and Cooking Aids
  - Maggi
  - Aloo Gatta
  - Pulao

- Confectionery
  - KitKat
  - Munch
  - Milkybar
  - Bar One
  - Polo

- Powdered and Liquid Beverages
  - NESCAFE
  - NESCAFE GOLD
  - NESCAFE Sunrise

Note: 1) As on March 11, 2019
INR Billion is INR 100 crore.
Favorable market dynamics for processed food sector in India

**Market Composition¹**
(2018)

- **Processed Food (Excluding Commodities)**
  - US$ 18.8 Bn
- **Nestlé Categories**
  - US$ 5.4 Bn

**Growth Drivers and Market Size**
(US$bn)

- Fast growth in urban population
- Increase in disposable income and propensity to spend
- Increasing demand for premium quality products
- Shift from unorganized to organized sector
- Increase of women in the workplace

Will lead to strong growth in the processed food sector in India with an increasing focus on Nutrition, Health and Wellness

### Market Size

<table>
<thead>
<tr>
<th>Year</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>12.5</td>
</tr>
<tr>
<td>2015</td>
<td>13.4</td>
</tr>
<tr>
<td>2016</td>
<td>14.5</td>
</tr>
<tr>
<td>2017</td>
<td>16.5</td>
</tr>
<tr>
<td>2018</td>
<td>18.8</td>
</tr>
</tbody>
</table>

2014-18 CAGR = 10.7%

Source: AC Nielsen.
Note: 1) Infant Formula and Infant Cereal included in Processed Foods and Nestlé categories
## Manufacturing citadels of Nestlé India

<table>
<thead>
<tr>
<th>Location</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Moga</td>
<td>1961</td>
</tr>
<tr>
<td>Choladi</td>
<td>1967</td>
</tr>
<tr>
<td>Nanjangud</td>
<td>1989</td>
</tr>
<tr>
<td>Samalkha</td>
<td>1992</td>
</tr>
<tr>
<td>Ponda</td>
<td>1995</td>
</tr>
<tr>
<td>Bicholim</td>
<td>1997</td>
</tr>
<tr>
<td>Pantnagar</td>
<td>2006</td>
</tr>
<tr>
<td>Tahliwal</td>
<td>2012</td>
</tr>
</tbody>
</table>

- Moga (1961)
- Choladi (1967)
- Nanjangud (1989)
- Samalkha (1992)
- Ponda (1995)
- Bicholim (1997)
- Pantnagar (2006)
- Tahliwal (2012)

Instant Tea largely for exports
Nestlé’s iconic brands winning with local consumers

<table>
<thead>
<tr>
<th>Category</th>
<th>Brand</th>
<th>Market Share (Value)¹</th>
<th>Nestlé Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>Infant Cereals</td>
<td>Cerelac</td>
<td>96.3</td>
<td>1</td>
</tr>
<tr>
<td>Infant Formula²</td>
<td>LACTOGEN NAN</td>
<td>67.5</td>
<td>1</td>
</tr>
<tr>
<td>Tea Creamer</td>
<td></td>
<td>44.9</td>
<td>1</td>
</tr>
<tr>
<td>Instant Noodles</td>
<td></td>
<td>59.1</td>
<td>1</td>
</tr>
<tr>
<td>Ketchups &amp; Sauces</td>
<td></td>
<td>21.3</td>
<td>2</td>
</tr>
<tr>
<td>Instant Pasta</td>
<td></td>
<td>68.9</td>
<td>1</td>
</tr>
<tr>
<td>White &amp; Wafers</td>
<td>KitKat</td>
<td>61.9</td>
<td>1</td>
</tr>
<tr>
<td>Instant Coffee</td>
<td>NESCAFE</td>
<td>50.5</td>
<td>1</td>
</tr>
</tbody>
</table>

Note: 1) A.C. Nielsen. MAT January 2018–December 2018; 2) Excludes Amulspray
Science and consumer driven innovation & renovation
### Our Purpose and Values framework

**Our purpose**
Enhancing quality of life and contributing to a healthier future

**Our values**
Values rooted in respect

### Where we make impact

**FOR INDIVIDUALS & FAMILIES**
Enabling healthier and happier lives
- Offering tastier and healthier choices
- Inspiring people to lead healthier lives
- Building, sharing and applying nutrition knowledge

**FOR OUR COMMUNITIES**
Helping develop thriving, resilient communities
- Enhancing rural livelihoods
- Respecting & promoting human rights
- Promoting decent employment and diversity

**FOR THE PLANET**
Stewarding resources for future generations
- Caring for water
- Acting on climate change
- Safeguarding the environment

**Brands with purpose**
Living our Purpose

For the period 2003-2018, for every tonne produced:
- energy usage by 45%
- water usage by 53% & waste water generation by 49%
- greenhouse gases generation by 55%

Leading the way to a waste-free future. Making 100% of our packaging recyclable or reusable by 2025

Nestlé Global Healthy Kids: Over 280,000 beneficiaries

Engaging 100,000 milk, 2,500 coffee and 1,250 spice farmers

Clean drinking water facilities: Over 136,500 beneficiaries

Enduring Partnerships

Continuous effort of fortifying products

Fortified with Iron, Vitamin A & Iodine

Fortified with 15 vitamins and minerals including iron, vitamin A, C, D and calcium

Healthier Future

Healthier Society

Healthier People

Healthier Businesses

Healthier Communities

Healthier Products

Healthier Environment

Healthier Businesses

Healthier People

Healthier Communities

Healthier Products

Healthier Society

Healthier Future
Living the Purpose through CSR

For Individuals and Families
Enabling Healthier and Happier Lives

**Project Jagriti**
Encouraging Good Nutrition and Breastfeeding Practices through Community Action

- 4.6 Mio Beneficiaries
- Over 280,000 Adolescents
- Over 1,850 Employees

For Our Communities
Helping Develop Thriving, Resilient Communities

- Over 136,500 Students
- Over 14,000 Vendors

- Creating Access to Clean Drinking Water
- Safe and Hygienic Food
- Sanitation facilities for girl students

For the Planet
Stewarding Resources for Future Generations

- Over 112,700 Students
- Nearly 300 Trees Saved

- Reducing Water use in Agriculture
- Creating Awareness about Water Conservation
- Recycling Waste Paper at Our Offices

Over 182,000 beneficiaries
Consistent growth with healthy margins to create economic value

### Sales of Products (INR Billion)

<table>
<thead>
<tr>
<th>Year</th>
<th>2001</th>
<th>2014</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>18</td>
<td>98</td>
<td>112</td>
</tr>
</tbody>
</table>

CAGR on Comparable Basis

- 2001–2014 CAGR: 13.9%
- 2001–2018 CAGR: 11.5%

### Profit from Operations¹ (INR Billion)

<table>
<thead>
<tr>
<th>Year</th>
<th>2001</th>
<th>2014</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>14.5</td>
<td>3</td>
<td>18.3</td>
</tr>
</tbody>
</table>

XX % Profit from Operations
XX % Profit from Operations on Comparable Basis

- 2001–2014 CAGR: 16.3%
- 2001–2018 CAGR: 14.1%

### Invested Capital² (INR Billion)

<table>
<thead>
<tr>
<th>Year</th>
<th>2001</th>
<th>2009</th>
<th>2013</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>35.5</td>
<td>73.8</td>
<td>33.4</td>
<td>63.9</td>
</tr>
</tbody>
</table>

XX % Return on Invested Capital²

- 2001-2009: INR 12 Billion
- 2010-2018: INR 44 Billion

### A Strong Evolution of CEPS, EPS and DPS

Rounded to Nearest INR

XX CEPS
XX EPS
XX DPS

- 2001–2018 EPS CAGR: 15.6%
- 2001–2014 EPS CAGR: 17.9%

INR Billion is INR 100 crore; Figures from 2016 onwards are as per Ind AS. Note: Effective 1 July 2017, sales and ratios derived from sales are not comparable due to change in structure of Indirect taxes. 1) Profit from Operations is arrived from 'Profit before Tax' after reducing Other Income and adding back Finance Costs (including interest cost on employee benefit plans), Net provision for contingencies (other than Corporate Social Responsibility expense). 2) Invested Capital consists of net fixed assets, net working capital (trade and other elements), net deferred tax liability. CEPS: Cash Earnings Per Share, EPS: Earnings Per Share, DPS: Dividend Per Share.
Created significant value for investors

Market Capitalization

- Total Shareholders Return: 1,869%
- Annualized Return: 18.8%

Up 21.5 times vs. FMCG Benchmark Index 12.7 times

INR 1,071 Bn

INR 50 Bn

2001

2018

INR Billion is INR 100 crore.
Source: Bombay Stock Exchange.
Humbled by the recognition

Forbes India Leadership Award for Best CEO – MNC

‘The Best CFO of a MNC – Large’ by YES BANK and Business World

ET Brand Equity Survey Rankings¹

<table>
<thead>
<tr>
<th>Category</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Brands</td>
<td>21</td>
<td>13</td>
</tr>
<tr>
<td>Confectionary</td>
<td>20</td>
<td>10</td>
</tr>
<tr>
<td>Hot Beverages</td>
<td>7</td>
<td>6</td>
</tr>
</tbody>
</table>

The Brands India LOVES and TRUSTS

Leadership

Unmatched Quality

Contribution to Society

Innovation

Best Place to Work

Recognition

CEREGROW was awarded ‘Product Innovation of the Year 2018’

CEREGROW was awarded ‘Product Innovation of the Year 2018’

Best Initiative for Working Mothers and among India’s Most Admired Employer

Note: 1) ET Brand Equity Survey Rankings for 2018 haven’t been released yet.
2018 key highlights

Reported Sales growth at 10.7%¹ (Comparable 13.8%)

Market leadership in 85% of Portfolio²

Domestic Sales growth is Volume Led and Broad based

Full Year Profitability remained strong

Strong cash generation from operations. Highest Ever

Increased Dividend Payout and Sustained Value Creation for Shareholders

Products scoring higher on NHW grow faster and are more profitable

Note: 1) Reported growth rates are adversely impacted due to lower reported sales by the change in structure of indirect taxes. 2) Infant Formula considered without Amulspray.
Domestic volume led growth

**Domestic Sales in INR Billion**

**Milk Products and Nutrition**

<table>
<thead>
<tr>
<th></th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>INR Billion</td>
<td>1.8</td>
<td>4.9</td>
</tr>
</tbody>
</table>

**Prepared Dishes and Cooking Aids**

<table>
<thead>
<tr>
<th></th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>INR Billion</td>
<td>45</td>
<td>49</td>
</tr>
</tbody>
</table>

**Confectionery**

<table>
<thead>
<tr>
<th></th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>INR Billion</td>
<td>12</td>
<td>14</td>
</tr>
</tbody>
</table>

**Powdered and Liquid Beverages**

<table>
<thead>
<tr>
<th></th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>INR Billion</td>
<td>11</td>
<td>12</td>
</tr>
</tbody>
</table>

**INR Billion is INR 100 crore.**

*Note: 1) Reported growth rates are adversely impacted due to lower reported sales by the change in structure of indirect taxes.*
## Margins and cash flows

<table>
<thead>
<tr>
<th>Profit from operations¹</th>
<th>Operating Cash Flows</th>
<th>Invested Capital²</th>
<th>EPS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Margin (%)</strong></td>
<td><strong>Margin (%)</strong></td>
<td><strong>Return on Invested Capital² (%)</strong></td>
<td><strong>DPS (INR)</strong></td>
</tr>
<tr>
<td>Margin on Comparable Basis (%)</td>
<td>Margin on Comparable Basis (%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18.1</td>
<td>17.9</td>
<td>43.2</td>
<td>86</td>
</tr>
<tr>
<td>21.0</td>
<td>18.3</td>
<td>63.9</td>
<td>115</td>
</tr>
<tr>
<td>17.5</td>
<td>17.4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>20.4</td>
<td>17.8</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### INR Billion is INR 100 crore. Note:
Effective 1 July 2017, sales and ratios derived from sales are not comparable due to change in structure of Indirect taxes. 1) Profit from Operations is arrived from ‘Profit before Tax’ after reducing Other Income and adding back Finance Costs (including interest cost on employee benefit plans), Net provision for contingencies (others) and corporate social responsibility expense .2) Invested Capital consists of net fixed assets, net working capital (trade and other elements), net deferred tax liability. EPS: Earnings Per Share, DPS: Dividend Per Share.
Harnessing opportunities through focused consumer clusters

Current Construct

Branch and State lens

- Consumer targeting influenced by past precedence and performance
- NPD planning and launches based on legacy and past performance

The Need

- Varying Consumer Potential
- Consumer Differentiation
- What sells where

The Action

- Planning Ahead
- Problem Solving
- Performance Tracking
- Resource Optimization
- Empowerment at Local Levels

We identify an Opportunity

15 Clusters across India
3 Clusters per Geographic Branch
3 Metro(s) Clusters

We have a Vision

Note: Maps not to scale.
Recalibrating for future

Our approach: **Standardize. Simplify. Share.**

Leveraging Skills and Scale to Drive Agility

- **Center of Scale (CoS)**
  - Global Expertise and World-class Services

- **Center of Competence (CoC)**
  - Shareable Judgmental or Competence Driven Activities

Provide World Class Business Services

Optimize Global End-to-End Flows

Leveraging Skills and Capabilities of Information Technology and NCE

Enable Through People
- Alignment, Leadership and Lean ways of working

Enable Through Technology
- Processes, Data and Systems
Iconic brands, R&D and know-how: Our strong suits from Nestlé Group

Unmatched bundle of IPR and Assistance compensated at arms-length

Trademarks

Know How: Technical

Know How: Non-Technical

Assistance

Zone Management and Group Functions

Strategic Business Units

Research and Development
Over 90% of sales in India come from 9 billionaire brands of Nestlé
Access to industry leading R&D...

Nestlé Group has sustained R&D investment of CHF 1.7 Billion p.a. over time

**DISCOVER**

**Nestlé Research:**
Drives science and technology, from basic nutrition and health research to applied research for product development and application.

**DISCOVER & DEVELOP**

**Nestlé System Technology Centre (NSTC):**
Supports the Coffee and Beverage Businesses with innovative system solutions and end-to-end R&D.

**DEVELOP**

**Nestlé Product Technology Centres (NPTCs):**
Scientific discoveries are translated into innovations fueling business growth in category-focused technology centres.

**DEVELOP**

**Nestlé Development Centres (NDCs) and R&D Centres (RDCs):**
Support NPTCs in product development focusing on a sub-category or a region.
...State-of-the-art research, patents and technology...

<table>
<thead>
<tr>
<th>Nestlé Institute of Health Sciences</th>
<th>Nestlé Institute of Medical Sciences</th>
<th>Nestlé Institute of Food Safety &amp; Analytical Sciences</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Improving health through nutrition</strong></td>
<td><strong>Making healthier the preferred and the tastier choice</strong></td>
<td><strong>Driving trust and innovation</strong></td>
</tr>
<tr>
<td>Metabolic Health</td>
<td>Sugar, fat, salt reduction while not compromising taste</td>
<td>Advanced tools in toxicology and microbiological safety</td>
</tr>
<tr>
<td>Musculo-Skeletal Health</td>
<td>Healthful carbohydrates, lipids and plant proteins</td>
<td>Pathogen control in mildly processed food</td>
</tr>
<tr>
<td>Gastro-Intestinal Health</td>
<td>Delivery of micronutrients and bioactives</td>
<td>Rapid profiling based on multi-omics principles</td>
</tr>
<tr>
<td>Brain Health</td>
<td>Clean label solutions for taste and texture</td>
<td>Identification of foodborne contaminants</td>
</tr>
<tr>
<td>Nutrition &amp; Dietary Recommendations</td>
<td>Emerging ingredients and technologies</td>
<td>Environment friendly packaging solutions</td>
</tr>
<tr>
<td>Cell Biology</td>
<td>Conceptualization and Prototyping</td>
<td>Big data solutions</td>
</tr>
<tr>
<td>Multi-omics</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Nestlé Institute of Health Sciences

Nestlé Institute of Medical Sciences

Nestlé Institute of Food Safety & Analytical Sciences
Operations instructions catalogue

Laboratory Instructions

Quality Testing Methods

Manufacturing

Environment Sustainability

Packaging

Manufacturing Excellence

Safety and Health

Quality Management

Recipe and Product Development

Regulatory Affairs

Raw Material Specifications¹

Other Guidelines, Standards & Policies

Note: 1) Access to relevant users available through GLOBE (Information Technology)
...Enabling best-in-class products and processes

<table>
<thead>
<tr>
<th>Product Innovation and Renovation</th>
<th>Manufacturing Technologies and Processes</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Nutritious milk drink containing high quality whey proteins, DHA¹, probiotics and immunonutrients, to support the overall growth and development of the child</td>
<td>• Salt, sugar, fat reduction</td>
</tr>
<tr>
<td>• Intended for dietary management of individuals with diabetes. Has low Glycemic Index, contains 20 vitamins and minerals and high quality protein</td>
<td>▼ Sodium</td>
</tr>
<tr>
<td></td>
<td>▼ Fat</td>
</tr>
<tr>
<td><img src="image1" alt="NAN" /> <img src="image2" alt="Ceregrow" /> <img src="image3" alt="Nescafe" /></td>
<td><img src="image4" alt="Infant Formula" /> Advanced manufacturing process based on analytics and predictive control</td>
</tr>
<tr>
<td><img src="image1" alt="NAN" /> <img src="image2" alt="Ceregrow" /> <img src="image3" alt="Nescafe" /></td>
<td>• Automated Cleaning in Process</td>
</tr>
<tr>
<td><img src="image1" alt="NAN" /> <img src="image2" alt="Ceregrow" /> <img src="image3" alt="Nescafe" /></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Optimization and Cost Efficiencies</th>
<th>Environmental Sustainability</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Improvement in yields</td>
<td>• Sustainable use of natural resources</td>
</tr>
<tr>
<td></td>
<td>▶ Recycling water extracted from milk and reuse it for processing, leading to reduction in ground water withdrawal by 25%</td>
</tr>
<tr>
<td>• Optimization of specifications</td>
<td>• Plastics Management</td>
</tr>
<tr>
<td></td>
<td><img src="image5" alt="Transiting to Recyclable Mono-material laminate" /></td>
</tr>
<tr>
<td>• Reduction in processing losses</td>
<td></td>
</tr>
<tr>
<td>• Energy efficiency</td>
<td></td>
</tr>
</tbody>
</table>

Note: 1) Docosahexaenoic Acid
Ongoing access to best practices across the value chain

**Comprehensive Repository of Best Practices, Tools, Standards**

**Commercial**

- CONTENT HUB
- BBNW
- Nestlé

**Operations**

- Demand and Supply Planning
  - Simplified Unbundling Cycle
  - Container Forecasting Tool
  - Routine Early Shipment Benefit Calculation
  - DSP Leader Cockpit
  - SKU Rationalization Report
  - Globe DSP Solutions Catalogue

**Support Functions**

- Finance, HR, IT...

**HR Competency Framework**

- Treasury Management at Nestlé

**Strategic Revenue Management**

- Commercial Mix
  - Strategy
  - Commercial
  - Customer
  - Connections
  - Supplier
  - Channel
  - Organization
  - Enablers
  - Execution

- Brand
  - Brand Health
  - Brand Equity
  - Brand Performance

- Pricing
  - Pack and Shell Price Range
  - Customer
  - Customer Promotion Plans

- Promotion
  - Promotion Management Guidelines

- Finance
  - Commercial Mix

- Brand
  - Brand Health
  - Brand Equity
  - Brand Performance

- Pricing
  - Pack and Shell Price Range
  - Customer
  - Customer Promotion Plans

- Promotion
  - Promotion Management Guidelines

- Finance
  - Commercial Mix
Assistance from experts

Coffee Extraction Cell Project Team (PTC-Orbe)

Implementation especially Complex Projects

Consistent Capability Building

Learning Management System

International Training and Conference Centre, Switzerland

Offsite Support
## Key takeaways

1. **Strong heritage built over 100 years in India**

2. **Powerful brands winning with local consumers**

3. **A proven track record of sustained value creation for investors and communities**

4. **Market with significant opportunity and potential**

5. **Iconic brands, R&D, know-how & expertise provided by Nestlé Group are key to Nestlé India’s success**