



Unlocking Growth

A CALP-Based Strategy for Unilever Ice Cream in India



Agenda



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Executive Summary

India's ice cream market is large and growing at 10–15% annually but faces critical hurdles—fragmented distribution, limited cold chain infrastructure, and low awareness in semi-urban/rural areas. Unilever currently holds a strong position but sees untapped potential, particularly outside major cities. To address these constraints, we propose a lean five-year plan centered on two core solutions: a robust integrated freezer and cold chain distribution program, and localized awareness initiatives targeting semi-urban and select rural markets. Supporting measures include introducing at least one affordable SKU range and running minimal store-level promotions to safeguard freezer space from competitors like Amul. By focusing resources on these two primary pillars and supplementing them with low-cost, high-impact actions, Unilever can capitalize on India's accelerating demand and significantly boost both market reach and brand loyalty.



India's Current situation

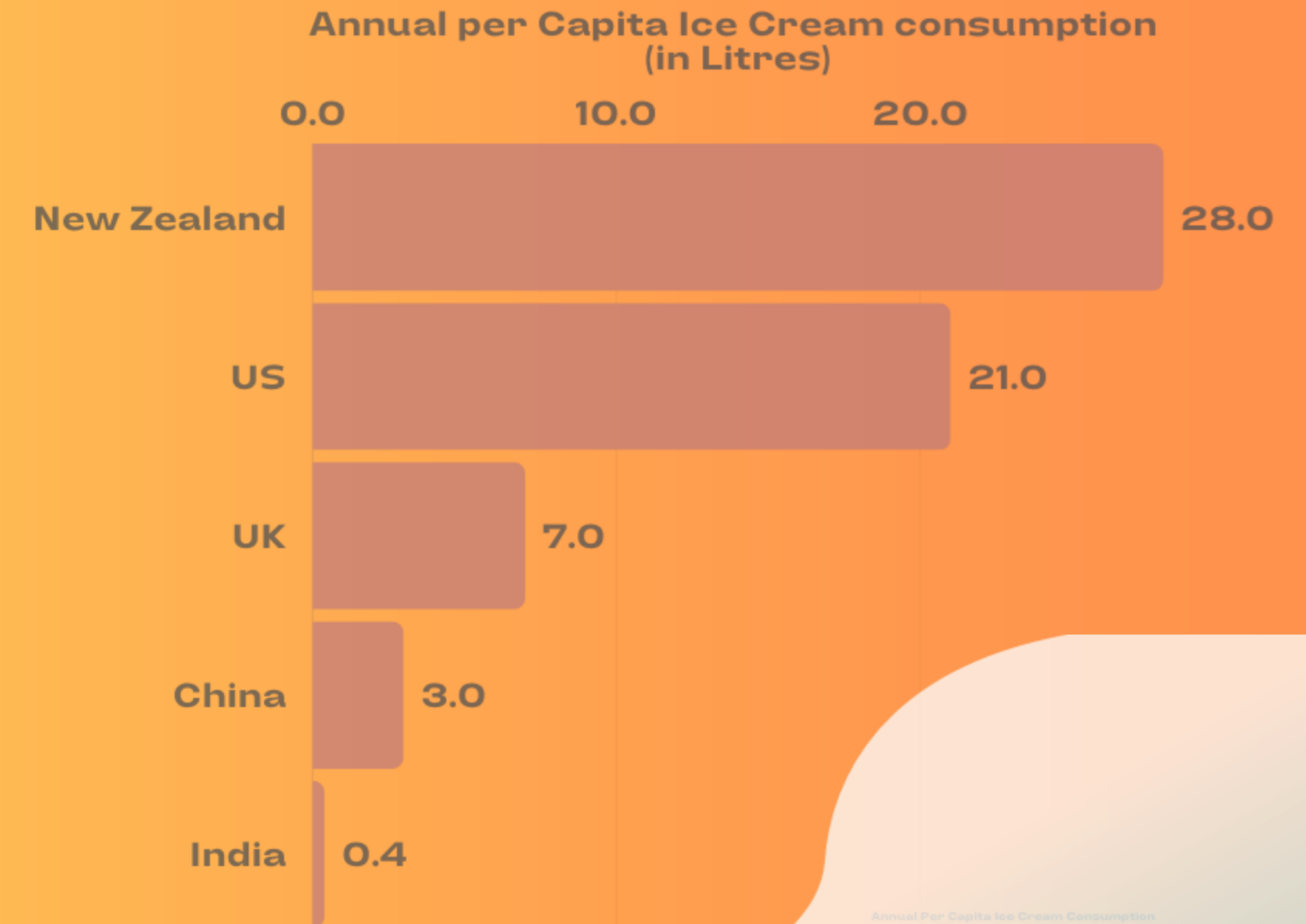
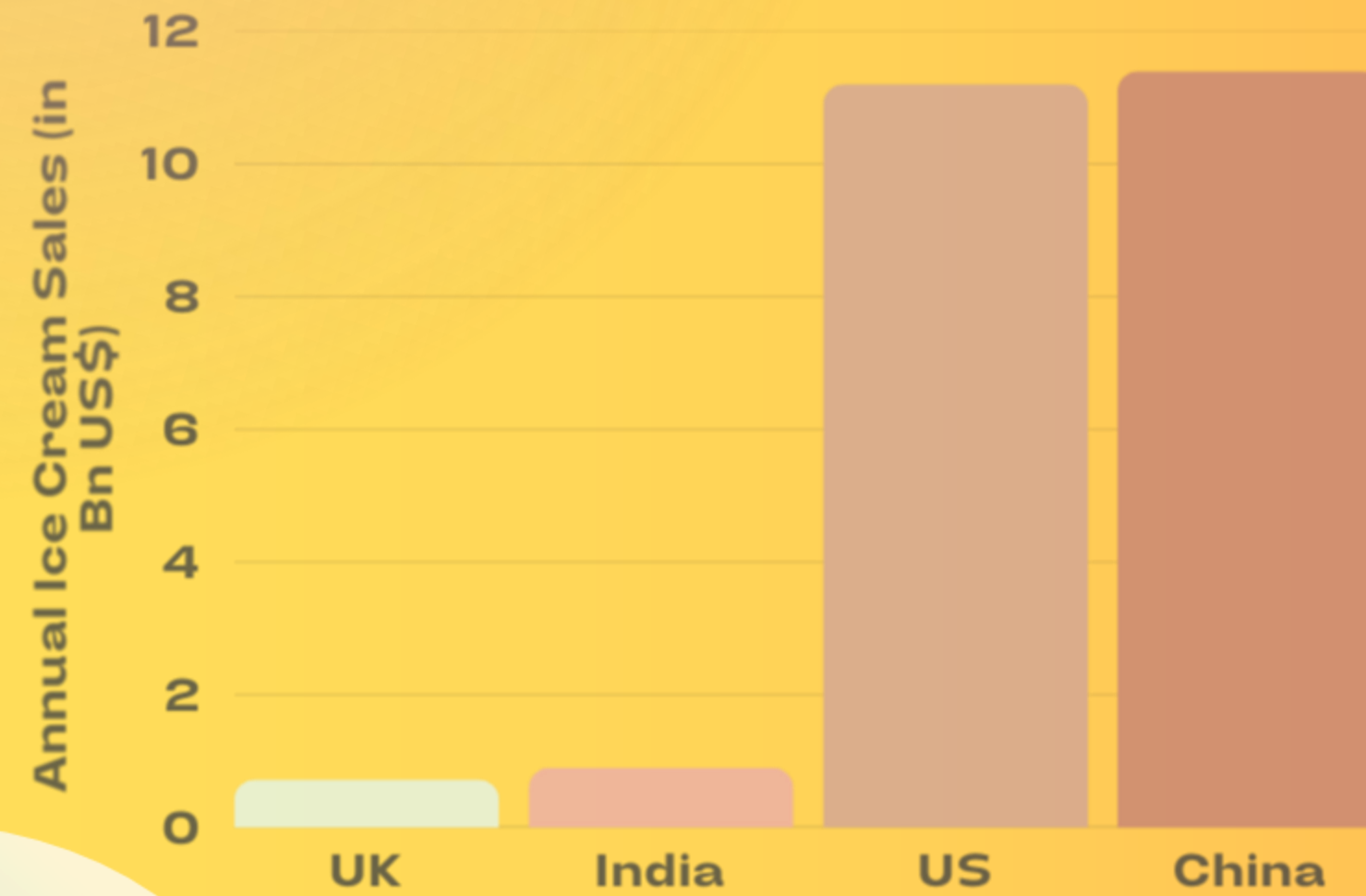
Ice cream Industry in India for the past 6 years

Year	Market Size (Billion)	YOY Growth
2019 (pre pandemic)	120 - 150	-
2020 (pandemic)	50	-60%
2021 (post pandemic)	100	+100%
2022	194.1	+93%
2023	228.6	18%
2024	268.0	17%



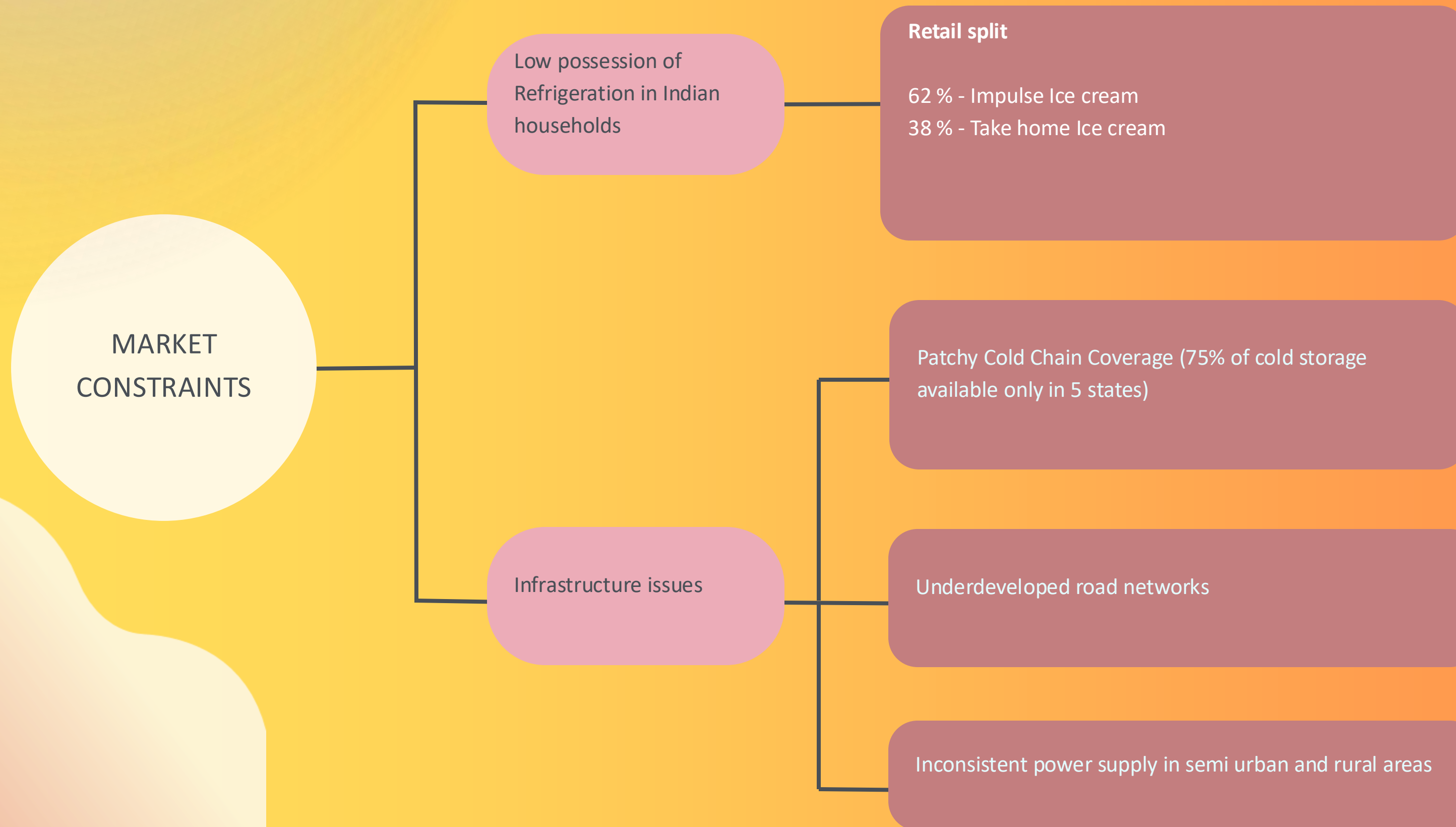
Industry analysts project the market will maintain a **~15% CAGR** in the coming years, making India one of the fastest-growing ice cream markets globally.

India vs the World



Annual Per Capita Ice Cream Consumption

Barriers to Scaling Ice Cream sales/consumption in India



India's Ice cream market

Huge market and low consumption

Market growing annually at 10- 15% per annum

Fast Growth but behind global peers

Multiple structural limitations limit full-scale adoption and limit full potential

Opportunities

How can Unilever grow its Ice cream category in India with the budget of 10 Million US\$ in the period of next 5 years in spite of all the barriers?



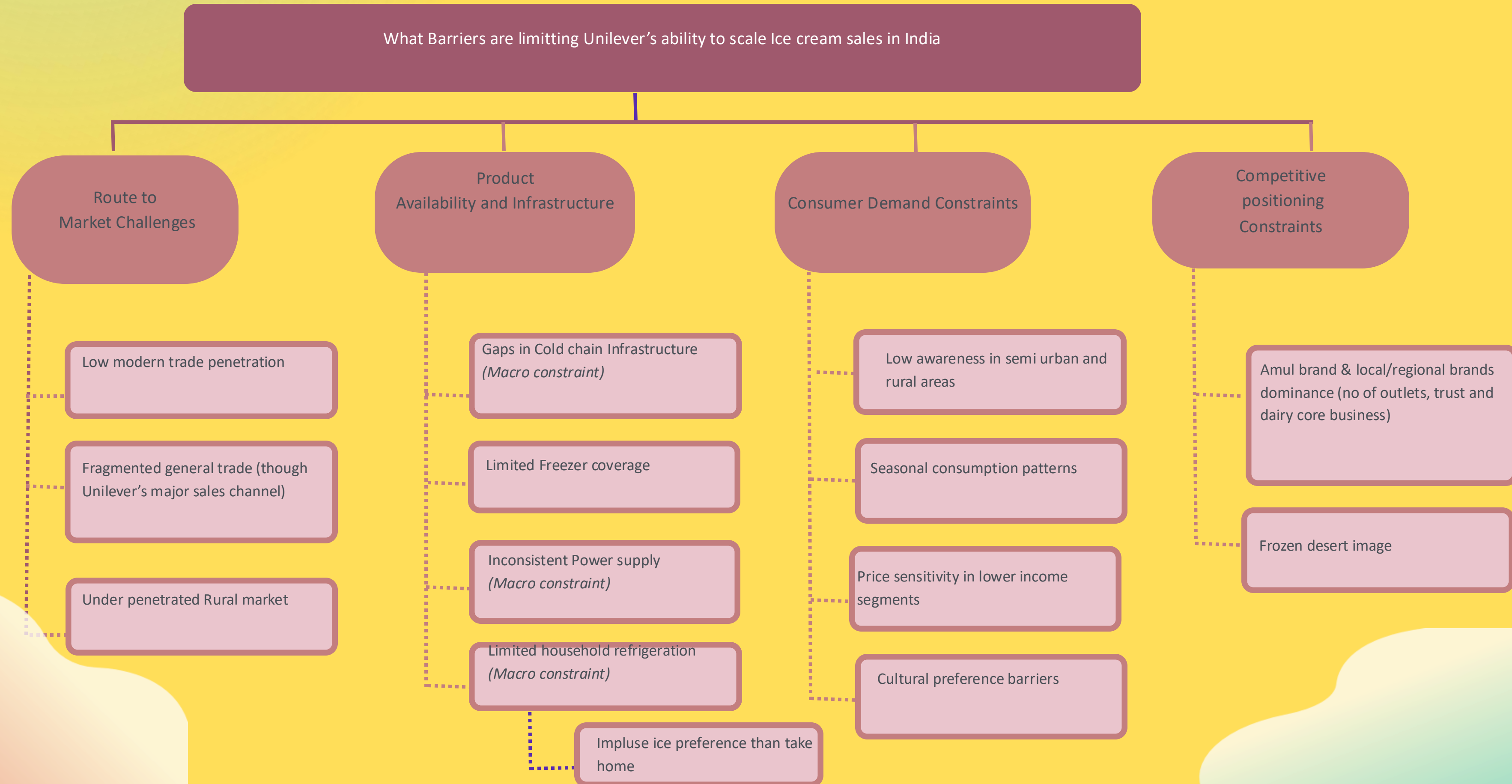
Inputs Guiding Our Hypothesis Framework

- Unilever-specific data (brand mix, profitability constraints because of non supporting core business model)
- Retail & distribution structure (emerging modern trade, general trade fragmentation, rural reach challenges)
- Infrastructure realities (cold chain gaps, freezer ownership, power reliability)
- Consumer insights (awareness, reviews, seasonality, affordability, fridge usage)
- Competitive landscape (Amul's dominance, local brand trust)
- Global market benchmarks (India's low per capita vs peers)
- Emerging product trends (premiumization, healthier formats, delivery options)
- Macroeconomic & climate factors (rising heat, income shifts, rural electrification)

Details in the
appendix



Our hypothesis Framework



Problem Prioritization



Problem Area	Barrier	Importance	Relevancy	Priority	Justification
Route to Market Challenges	Low modern trade penetration	High	High	PRIORITIZE	Urban & Tier 2 scaling enabler;
	Fragmented general trade	High	Low	MODERATE	Dominant channel and currently accounts for major sales; Not a near time barrier
	Under penetrated Rural market	Medium	Medium	MODERATE	High logistics cost; worth focusing only in high-potential rural zones
Product Availability & Infrastructure constraints	Gaps in cold chain infrastructure (macro constraint)	High	Medium	PRIORITIZE	Critical to product quality & reach; solvable via targeted freezer expansion
	Limited freezer coverage	High	High	PRIORITIZE	Directly limits impulse and take-home sales; within Unilever’s influence
	Inconsistent power supply (Macro constraint)	Medium	Low	Outside Control — Work Around	Can't control directly, but can navigate via solar or shared asset models
	Limited Household Refrigeration -more impulse purchase than take home (macro constraint)	Medium	Medium	MODERATE	Many households can’t reliably store take-home ice cream. Thus, Unilever should focus on impulse SKUs and smaller portions for now, while remaining ready to expand take-home options if household refrigeration usage improves.
Consumer Demand Constraints	Low awareness in semi urban and rural areas	High	High	PRIORITIZE	Major unlock for scale; affordable to address via awareness, sampling, visibility in larger villages, semi-urban pockets that have better electricity or feasible solar solutions and higher disposable income
	Seasonal consumption patterns	Medium	Medium	MODERATE	Relevant in Tier 1 cities; de-seasonalization possible with product innovation
	Price sensitivity in lower-income segments	High	High	PRIORITIZE	Critical to growth in rural & value segments; pricing innovation possible
	Cultural preference barriers	Low	Medium	DEPRIORITIZE	Long-term behavioral shift; hard to influence directly
Competitive Positioning Constraints	Amul/local brand dominance (dairy core business)	High	High	PRIORITIZE	Direct competition for rural & mass volumes; needs brand & retail strategy
	Frozen dessert image barrier	Medium	Low	DEPRIORITIZE	Niche concern; mainly among informed/urban buyers, not a mass constraint

Problem Prioritization Map



Priority



Barriers

SOLUTIONS to key problems



Problem	<div>Low modern trade penetration</div>	<div>Gaps in cold chain infrastructure (macro constraint)</div> <div>Limited freezer coverage</div>	<div>Low awareness in semi urban and rural areas</div>	<div>Price sensitivity in lower-income segments</div>	<div>Amul/local brand dominance (dairy core business)</div>
	<div>Modern Trade Partnerships & Promotions Program</div>	<div>Integrated Cold chain and freezer distribution program</div>	<div>Awareness Campaigns and initiatives</div>	<div>Affordable SKUs & Pricing Strategy</div>	<div>Retail Visibility & Incentives</div>
Solution Space	<div>Partnerships with Tier 2/3 supermarkets</div> <div>In-store promotions</div> <div>Joint brand campaigns</div> <div>Local Bundling deals</div>	<div>Solar/Hybrid Freezers for High-Priority Routes</div> <div>Mobile Freezer Vans (Hub-and-Spoke) in Tier 2/3 towns</div> <div>Collaborative Distribution Pilots (Partner with local micro entrepreneurs or cold storage providers)</div>	<div>Local radio, wall painting, sampling</div> <div>Festivals and on the ground events</div> <div>Local influencer push</div>	<div>Introduce ₹5–₹20 SKUs</div> <div>Value packs for families</div> <div>Periodic price promotions</div> <div>Cost optimization in supply</div> <div>Credit cash line in local areas</div>	<div>Margin boost & signage in key mom and pop stores</div> <div>Tiered loyalty program for volume</div> <div>Combat Amul's Strong hold</div>



Solution Prioritization



Fully address barrier



Partly address barrier



Does not address
barrier



Barriers		Modern Trade Partnerships & Promotions Program	Integrated Freezer & Cold-Chain Distribution Program	Awareness Campaigns and initiatives in semi urban and rural areas	Affordable SKUs & Pricing Strategy	Strengthen Unilever’s retail visibility and incentives in Amul/local-dominated outlets
Route to Market Challenges	Low modern trade penetration	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
Product availability & Infrastructure constraints	Gaps in cold chain infrastructure	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
	Limited freezer coverage	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
Consumer Demand Constraints	Low awareness in rural areas	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
	Price sensitivity in lower-income segments	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
Competitive Positioning	Amul/local brand dominance (dairy core business)	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>

Business Strategy for 5 years

Lean approach (2 core solutions + minimal supportive actions)

Core Solutions:

- Integrated Freezer and Cold Chain Distribution Program
- Awareness Campaigns and Initiatives in Semi Urban and key rural areas

Add Ons:

- At least one affordable SKU range to handle price sensitivity.
- Minimal store-level promotions (not a big nationwide push) to prevent losing freezer space to Amul in newly equipped outlets.



Target Segment & Product



- Rural & Semi-Urban Families
- Smaller Mom Pop up stores with co funded freezers by Local Entrepreneurs (for distribution and retail)
- Seasonal or Festival Packs (e.g., “Holi Special,” “Diwali Delight”) to deepen cultural connections.
- Single-Serve Sticks & Low-Cost Multipacks in flavors that match local taste preferences (e.g., saffron, mango, kulfi).

Price



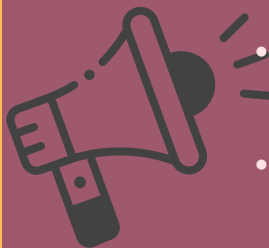
- Tiered Pricing within the value segment itself, such as 5–15 INR ranges for single sticks, and slightly higher but still accessible prices for multipacks.
- Khata or Credit System to let households pay monthly.
- Partnerships with microfinance or self-help groups for pre-paid “ice cream budgets.”

Place



- Solar-Powered or Battery-Backed Freezers in small shops, especially in areas with power outages.
- Mobile Kiosks for reaching weekly markets or village fairs.
- Micro-Distribution Networks using local entrepreneurs to expand last-mile coverage.
- School and Market Activations to increase product trial (tasting booths, local events).

Promotion



- Engage with local influencers and schoolteachers to host ice cream-tasting sessions emphasizing quality, fun, and nutritional value—especially if the product contains fruit-based flavors with vitamins.
- Leverage grassroots messaging platforms like WhatsApp to share short “behind-the-scenes” clips of ice cream production or tips on safe storage at home.
- Vernacular Marketing on popular rural channels (local-language radio, short-video apps).
- Cultural Tie-Ins (linking ice cream to local festivals or family gatherings) in marketing messages.
- Bundle ice cream with other essential items (e.g., cooking oil) for value combos, making it more attractive for local shops.

EXECUTION PLAN FOR YEAR 1

Year By Year Lean strategy



What	How	Where	Budget (rough estimate)	Goal	Target
Pilot Integrated Freezer Program	<ul style="list-style-type: none">Deploy ~700 co-funded freezers (with the help of micro entrepreneurs) in selected mom and pop storesExperiment with 10–15 solar/hybrid freezers in off-grid areasIntroduce 10 freezer carts to test hub-and-spoke delivery	2–3 Tier 2/3 cities + adjacent semi-rural clusters	(~\$1.3M)	<ul style="list-style-type: none">Validate ROI/freezer usageUnderstand local power constraints & retail acceptanceGather baseline sales & brand presence data	<ol style="list-style-type: none">700 freezers placed; solar/hybrid pilot feedback+15% brand awareness in targeted rural pocketsSales uptick in pilot areas (goal: +5–10% vs. baseline)
Rural Brand Awareness: Phase 1	<ul style="list-style-type: none">Local radio spots, wall painting, small “taste caravans” at weekly marketsBasic influencer outreach (local teachers, minor celebs)	1–2 high-potential rural districts near pilot cities	(~\$0.5M)	<ul style="list-style-type: none">Establish baseline brand awareness (target +10–15% from near-zero)Begin building consumer familiarity with Cornetto, Kwality Wall’s	
Minimal Supportive Action	<ul style="list-style-type: none">Launch or promote 1–2 affordable impulse packs (₹10–₹20) in pilot districtsProvide margin boosts or signage to ~50 key mom pop up store outlets in pilot towns		(~\$0.2M)	Test if partial store-level incentives + affordable packs boost early adoption	

EXECUTION PLAN FOR YEAR 2

Year By Year Lean strategy



What	How	Where	Budget	Goal	Target
Pilot Integrated Freezer Program	Place an additional ~1,200 co-funded freezers Double solar/hybrid freezers if ROI from Year 1 is good Increase mobile carts/vans to 30	Add 2–3 more Tier 2/3 hubs + expand deeper in existing ones	(~\$1.2M)	Cover ~25% of key Tier 2/3 city market opportunities Refine distribution routes	~1,900 total freezers placed, 40–50 solar/hybrid units Rural brand awareness hitting 25–30% in covered zones Price SKUs driving +15–20% incremental volume in pilot areas
Rural Brand Awareness: Phase 2	Radio/WhatsApp marketing, localized “ice cream fests,” school tie-ups Some small TV channel spots if cost-effective in those areas	Expand to 3 more adjacent districts	(~\$0.5M)	Achieve ~20–25% brand awareness across newly added districts Evaluate correlation between distribution presence & brand recall	
Minimal Supportive Action	Introduce 1–2 new flavors or repackage existing ones Ensure easy supply in new General Trade outlets with freezers	Expand incentives to ~100 more shops with proven volume potential	(~\$0.3M)	Test if partial store-level incentives + affordable packs boost early adoption	

EXECUTION PLAN FOR YEAR 3

Year By Year Lean strategy



What	How	Budget	Target
Pilot Integrated Freezer Program	Streamline routes to cut wastage Phase out underperforming freezers Focus on maintaining high fill rates (≥70%) in installed outlets	(~\$1M)	Cold-chain network well-optimized in 6–8 Tier 2/3 clusters 40–50% brand awareness in existing rural coverage Affordable SKUs: ~25–30% of local volume in pilot areas
Rural Brand Awareness: Phase 3	Sustain brand presence with periodic radio ads, renewed wall paintings Shift some costs to local distributors or co-op events	(~\$0.4M)	
Minimal Supportive Action	Ramp Up Affordable SKUs in Covered Areas: 1. Double down on best-selling ₹10–₹20 impulse lines 2. Introduce seasonal micro-packs for festivals Modest Pop up store Incentives: Expand margin-based promotions to 200 additional GT shops 2. Offer volume-based rewards to keep Unilever SKUs in prime freezer space	(~\$0.6M - 0.3 M each)	

EXECUTION PLAN FOR YEAR 4

Year By Year Lean strategy



What	How	Budget	Target
Pilot Integrated Freezer Program	Extend integrated freezer solutions to new Tier 2/3 regions near established hubs Increase solar/hybrid units if ROI data is strong	(~\$1M)	Another ~1,000 freezers placed, focusing on high-ROI expansions 50–60% brand awareness in covered rural pockets GT shops: 500–600 actively participating in incentives
Rural Brand Awareness: Phase 3	Add 2–3 more districts Move from generic brand awareness to promotional offers (e.g., “village challenge—taste & share”)	(~\$0.4M)	
Minimal Supportive Action	Keep Supportive Tactics - Minimal Impulse SKUs: Refresh packaging; highlight local flavors (e.g., Mango, Kesar) Expand to another 200 mom pop up stores if previous waves prove successful Experimental Modern Trade Even though it’s not a core priority, invest lightly in selective modern trade expansions in newly developing Tier 2 areas. This ensures a presence for premium lines (Cornetto, Magnum).	(~\$0.6M - 0.3 M each)	

EXECUTION PLAN FOR YEAR 5

Year By Year Lean strategy



What	How	Budget	Target
Pilot Integrated Freezer Program	Identify top-performing distribution sub-regions & replicate the model in next wave of districts Maintain existing freezers, retarget underperforming ones	(~\$1.2 M)	60–70% of Tier 2/3 city clusters with consistent freezer coverage 60% brand awareness + initial brand loyalty in targeted rural pockets Achieve double-digit growth year-over-year, with significantly reduced seasonality
Rural Brand Awareness: Phase 3	Introduce brand loyalty programs (simple reward or refer-a-friend) Shift from pure awareness to brand preference & advocacy	(~\$0.3M)	
Minimal Supportive Action	Lean Enhancements : Refine Low-Cost SKUs: Keep pace with evolving consumer feedback Mom Pop up store Relationship: Evolve from margin incentives to co-branded store experiences Small Modern Trade Support Possibly expand to 1–2 more urban centers or add new premium SKUs if the budget allows	(~\$0.2 for lean enhancements and 0.3 M for Small trade support)	

MARKET GROWTH PROJECTIONS



Below is a concise projection based on:

- 1. A 15% annual market growth (CAGR) for India’s ice cream category.
- 2. A starting market size of \$3.0 B and an initial Unilever share of 16% (\$480 M).
- 3. A \$10 M total investment over five years on our Business and marketing strategy

Year	Total Market (\$B)	Unilever Share	Unilever Revenue (\$M)
0 (Base)	3	16%	480
1	3.45	18%	621
2	3.97	19%	754
3	4.57	20%	914
4	5.25	22%	1,155
5	6.03	24%	1,447

VISUAL MOCKUP



Social media post for Semi urban
and Rural areas



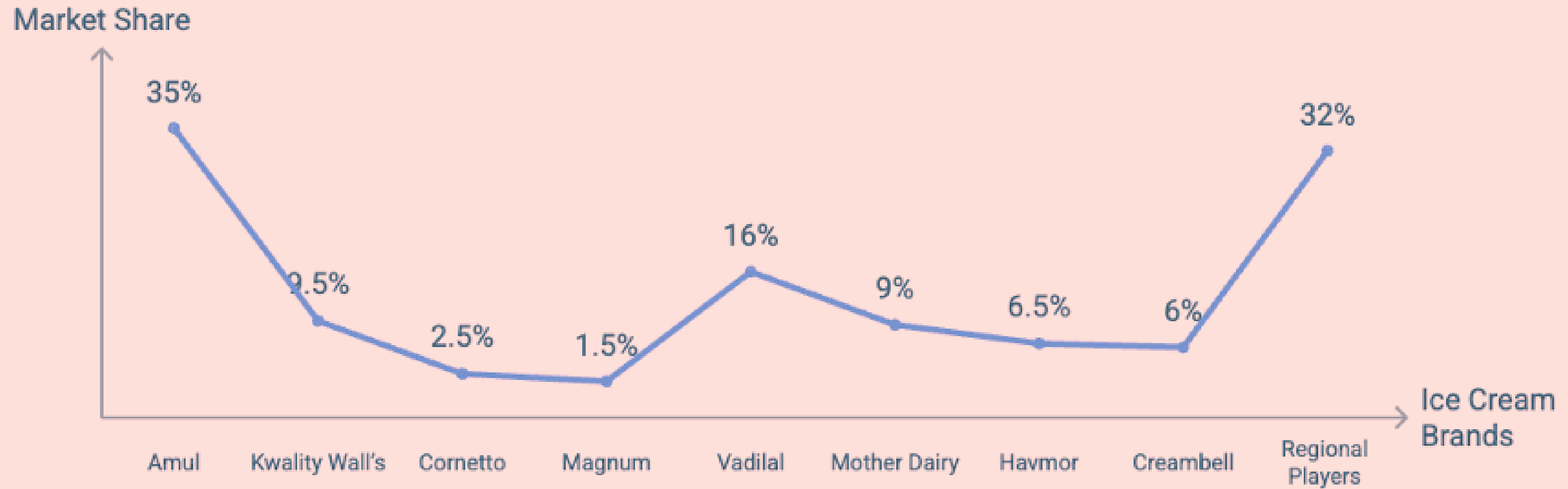
Wall poster



Social media post for Call out of micro
entrepreneurs to co fund freezers



APPENDIX



Market Share of Ice Cream Brands in India

APPENDIX:

Competitor Analysis



Aspect	Amul	Kwality Wall's (HUL)
Market Share & Distribution	~35–45% share (leading the market)	~15% share (2nd position)
	~1 million retail outlets (~50% coverage)	~500,000 retail outlets (~25% coverage)
	Ubiquitous in cities and towns through cooperative networks	Significant gap in distribution vs. Amul; must expand channels (traditional + online)
Profitability & Margins	Cooperative model lowers overhead	EBIT margin ~5–9%, well below HUL's overall ~17%
	Ice cream margins not separately disclosed, but scale + synergy with dairy reduces costs	Low margins reduce reinvestment (marketing, innovation)
Core vs. Emerging Segments	Focused heavily on mass-market ice cream	Mass-market lines are 85–90% of volume
	Competes strongly on value and “real milk” image	Premium/health lines (Magnum, sugar free) still a smaller slice but crucial for future urban/health-conscious demand

Target Segment



Consumer Reviews

High Overall Positivity: Out of all 100 reviews, 75% were classified as positive.

Negative Reviews : 25%

Problem Category	Explanation	Priority	% of Negative Reviews
Taste	Complaints about artificial or off flavors (e.g., “palm oil” aftertaste), rancid coconut smell, chemical/pesticide notes, or icy texture	High	81.25%
Quality	Reports of dirty or subpar products (hair in ice cream, “pesticide” odor), inconsistent freshness, or poor manufacturing standards	High	43.75%
Service	Missing/broken items in orders, melted deliveries, slow/unhelpful customer support, or failures with promo codes/rewards	Medium	37.50%
Price	Perceived as “overpriced” or “not worth it,” especially for premium lines (e.g., Magnum)	Medium	25.00%
Health	Concerns about “harmful” ingredients, high sugar, or negative reactions (e.g., “food infection,” “pesticide smell”)	Medium	25.00%
Milk vs. Vegetable Oil	Criticisms over Kwaliti Wall’s using vegetable fats (making it a “frozen dessert” rather than pure dairy ice cream)	Low	12.50%
Packaging	Complaints about improper sealing, damaged wrappers, or inadequate insulation leading to leaks or freezer burn	Low	6.25%
Quantity	Allegations of reduced fill levels (“shrinkflation”) or smaller pack sizes without price adjustments	Very Low	0.00%



Thank
you



Abinaya Velusamy