

Investor Seminar 2011



Agenda

A Financial Update	John Gibney
Britvic's Input Costs	Martin Rose
<i>Brief Q&A and Break</i>	
Britvic France: The Outlook	Jean-Luc Tivolle
Britvic Ireland: The Outlook	Andrew Richards
<i>Break</i>	
The Global Opportunity	Simon Stewart
2011 GB Innovation <i>and</i> Brand Activity	Jonathan Gatward
<i>Q&A and Finish</i>	



A Financial Update

John Gibney, Group Finance Director



Agenda

Structural Changes - Costs & Exceptionals

Strengthening Our On-The-Go Offer

A More Secure Balance Sheet

Confirming Guidance And Ambitions

Delivering Against Our Track Record

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Britvic Ireland – Cost Savings

Total Headcount Savings	110 heads
--------------------------------	------------------

<i>2011 Logistics Savings</i>	<i>€0.8m</i>
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<i>2011 Payroll Revenue Savings</i>	<i>€3.9m</i>
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Total Savings in 2011	€4.7m
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<i>2012 Logistics Savings</i>	<i>€1.2m</i>
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<i>2012 Payroll Revenue Savings</i>	<i>€5.7m</i>
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Total Savings in 2012	€6.9m
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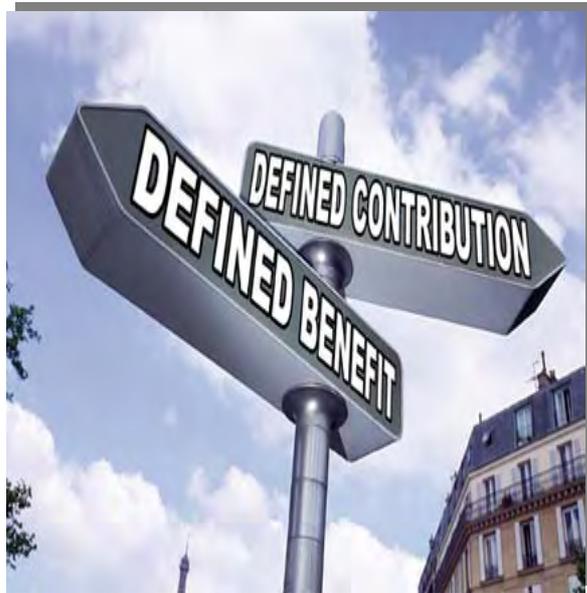
GB Pensions – Major Recent Changes

- GB's DB plan:

- *closed to new entrants and reduced accrual rate some time ago*
- *closed to future accrual from April 2011*

- All GB employees now moving to DC

- Aim to agree new GB DB funding plan with trustees by the interims on 27th May 2011



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The Data Centre And Software Upgrades

What We've Done

- Outsourced to Data Centre to our strategic partner, Atos Origin
- Fully upgraded our core systems, SAP and Siebel

The Rationale

- Secure and resilient IT infrastructure leveraging scale
- Supporting international expansion

The Impact

- Facilitates material growth of the business
- TUPE transfer of a dozen staff to Atos Origin this year
- Marginal cost and capital savings
- Exceptional costs



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A New Vending Opportunity For GB

Make, Market, Sell – No retail

Major complexity reduction –
7,000 accounts down to 5

100% of time on growing distribution
0% of time on operations

Vending opportunity far more accessible
to our Grocery, Impulse and Foodservice
teams than ever before



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2011 Exceptional Items

Vending Opportunity

—
*c.£3m on asset write-downs
c.£3m exit and
redundancy costs*

Gross Pension Curtailment Credit

—
*expected to be in the
range of £15m-£20m*

Britvic Ireland Restructuring

—
*expected to be
c.£10m*

Data Centre and Software Upgrades

—
*c.£3m - dual-running and
temporary infrastructure*

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Debt Refinancing

Revolving Credit Facility

- New £400M RCF agreed
- Matures March 2016
- 6 out of 7 banks retained
- Commitments scaled back
- Reduced fees and margin

US Private Placement

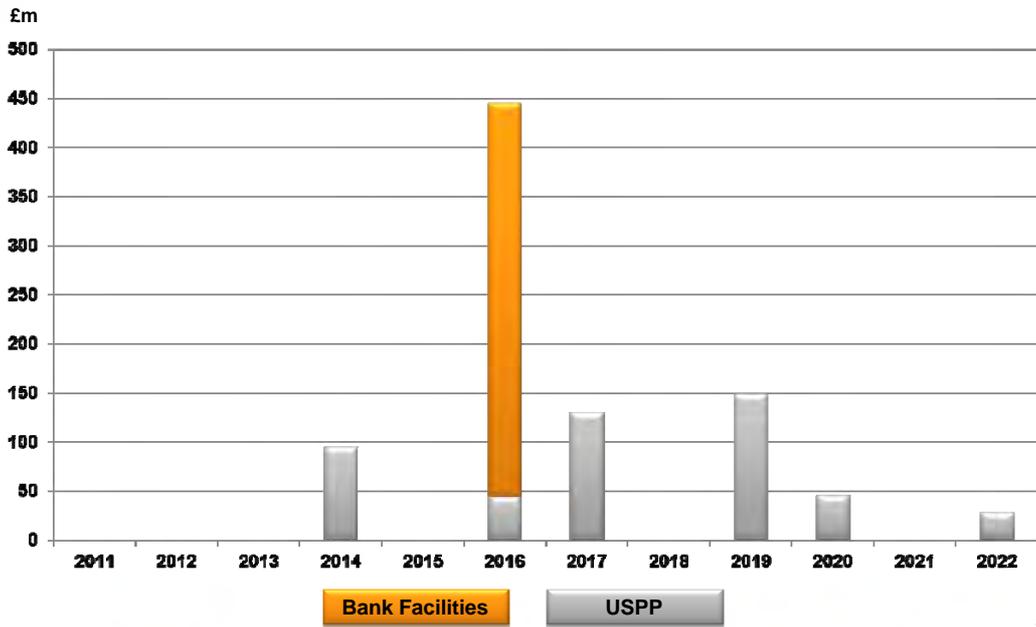
- £490m of USPP notes
 - £229m raised in Feb 2007
 - £149m raised in Dec 2009
 - £113m raised in Dec 2010
- Swapped to fixed & floating sterling & euros
- Dec 2010 issue
 - 7, 10 and 12-year notes
 - Post-swapped fixed rates of <4%
 - Post-swapped floating rate margin <1.25%



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Debt Repayment Profile



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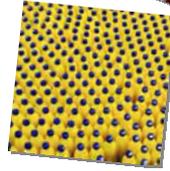
Margin Ambitions

An Improvement Of 50bps
Per Year In The
Group EBITA Margin

From 2012, vs 2011 as a base

Driven by:

1. *Operating Leverage*
2. *Product Value Optimisation*
3. *Brand & Channel Mix*
4. *Synergies*
5. *Franchising*
6. *Britvic Ireland Revenue Ambitions*



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Guidance

Revenue Drivers

- Innovation adds 1-2% to the top line
- Medium-term growth drivers remain robust
- ARP driven by headline price increases, brand & channel mix and promotional efficiency
- The impact of franchising
- GB & French markets growing, Ireland stabilising

Margins & Synergies

- Average annual EBITA margin growth of 50 bps from 2012
 - H1 represents 25-30% of full-year profit
- French brand contribution margin declines vs. 2010
 - Synergies by 2013
 - €17m
 - Back-loaded versus the original phasing

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Guidance

Costs

- GB & Ireland input-cost inflation likely to be 9-11%
- French input-cost inflation higher
 - Further group-structure investment of £2m
 - PVO will deliver:
 - £2m in 2011
 - £2m as a good annual guide
 - **£8m** in 2012

Capex & Amortisation

- GB £50-55m
(£60-£65m in 2012)
- Ireland €8m
 - France €5m plus:
 - 2011 €8m
 - 2012 €25m
 - 2013 €2m
 - Amortisation of c.£13m in 2011

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Key Messages

Focus On Costs & Securing
The Balance Sheet

Strengthening Our On-The-Go Offer
And IT Infrastructure

Margin Accretion Resumes In 2012

Delivering Against Our Track Record

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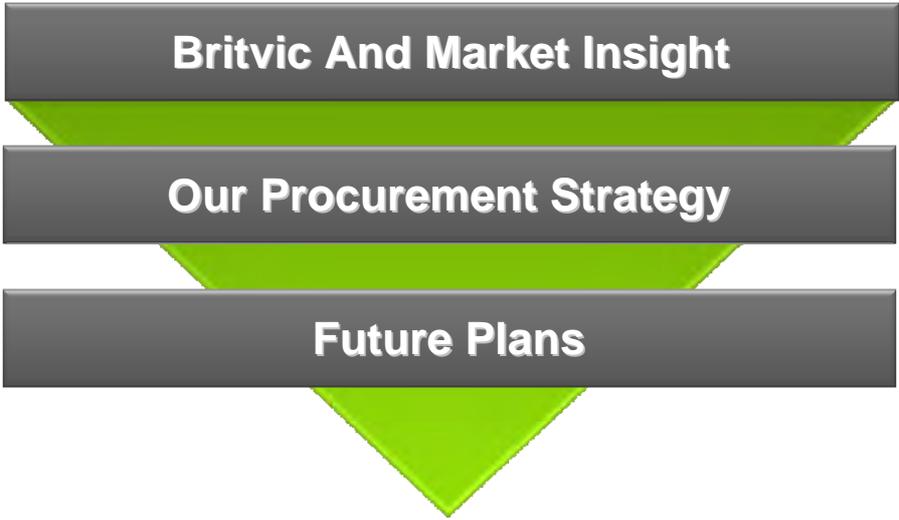


Input Costs

Martin Rose,
Group Supply Chain Director



Agenda



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Package Mix



Sugar



**PepsiCo
Concentrate**



Closures



Orange Juice



Glass



Apple Juice



PET



Steel

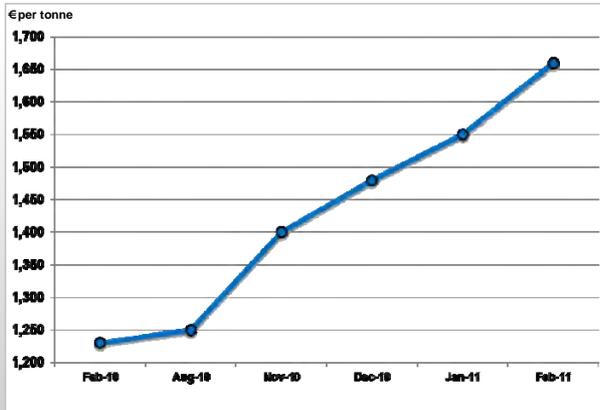
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Current Issues - PET



Pricing At Highest Level For 3 Years



Source: Datagain information services, PET resin, Western Europe

- *Pakistan floods impact on cotton crops has led to increased demand for synthetic materials*

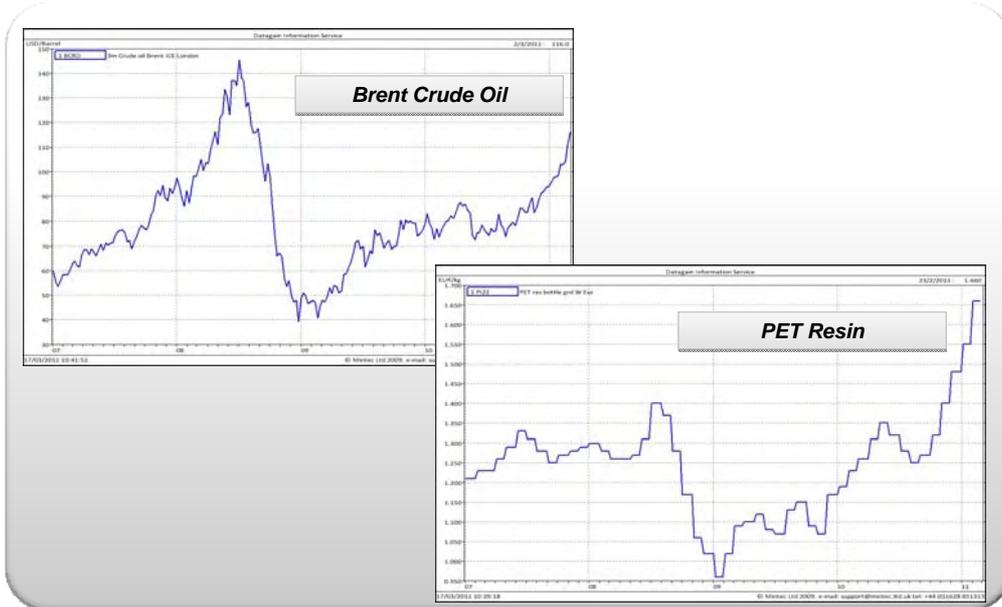
- *Plant output in Belgium hit by force majeure*

- *Oil price (a key driver of PET resin) increase*

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PET Resin Prices Partly Impacted By Oil



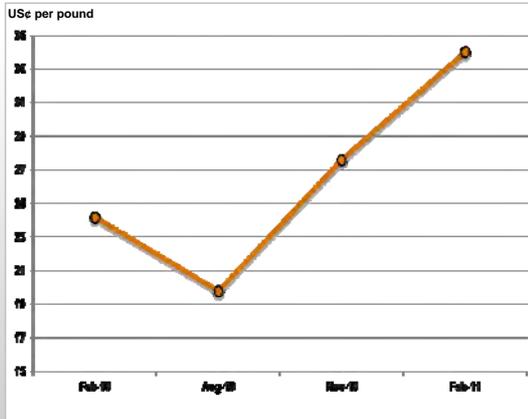
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Current Issues - Sugar



Pricing At A 30-Year High



Source: Sugar number 11 futures price

- Poor weather led to a downgrade in GB sugar-beet forecast in February

- Supply / Demand imbalance

- The EU - now a net importer of sugar

- World price now materially ahead of the EU price, driven by BRIC demand

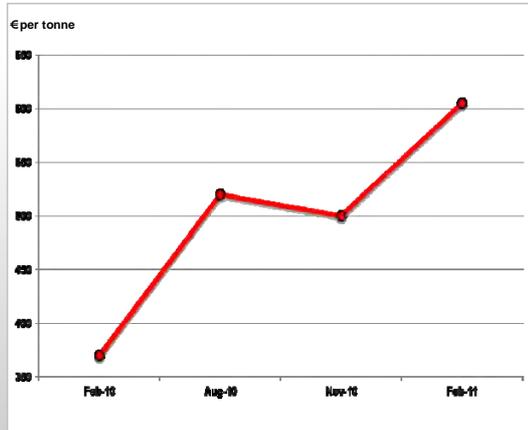
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Current Issues - Steel



Global Demand And Rising Cost Of Inputs



Source: Datagain – Steel HR coil, Western Europe

The global price of steel has risen due to:

- *Global demand*
- *Rise in cost of steel inputs such as iron ore and coking coal*
- *Rising input cost triggered contract collar in February*

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Other Major Inputs

Juice

- Orange primarily from Brazil
- Apple from China and Eastern Europe
- Long-standing relationships with suppliers
- BRIC demand a key driver of inflation
- Crop reports due late Spring



Glass

- Supplies secure for 2011
- Glass demand increasing both in Europe and globally
- Primarily used in Pubs & Clubs



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Sustainability And Growth

Assurance
Of Supply

Using
Less

Evolve

Sustain

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Procurement Strategy: Assurance of Supply

Minimising Supply Risk

Nurturing relationships with key suppliers & building new ones



Proactive commodity trends analysis



Buying at source



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Procurement Strategy – Using Less

PVO in FY11 Will Deliver Against Previous Guidance

<p>PET Saving 1,479 tonnes p.a. via pack re-design</p>	<p>Cardboard Saving 558 tonnes p.a. via pack re-design</p>	<p>Aluminium Saving 240 tonnes p.a. by moving to a new end design</p>	<p>Robinsons Reduction of bottle weight delivers a 1,278 tonnes p.a. PET saving</p>
			

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Product Value Optimisation



Procurement Strategy – Sustain

Corporate Responsibility

**Ethical
Trading**



**Waste
Management**



**Forest
Stewardship
Council**



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Procurement Strategy – Evolve

Innovation In Procurement

**Consortium
Buying**



**Vertical
Integration**



Hedging



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Looking Ahead To 2012



Impact of BRIC economies:

- *Supply worldwide on most commodities is not meeting demand*
 - *Demand not at its peak yet*
 - *PET pricing remain volatile*

2012 Raw Material Inflation Likely To Be Mid-Single Digit

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Key Messages

Short-term Unprecedented Position

Continuing Global Pressure On Resources

Opportunities To Mitigate Global Position Still Exist

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Brief Q&A and Break



Britvic France: The Outlook

Jean-Luc Tivolle, Managing Director



Agenda

A Vision Of Growth

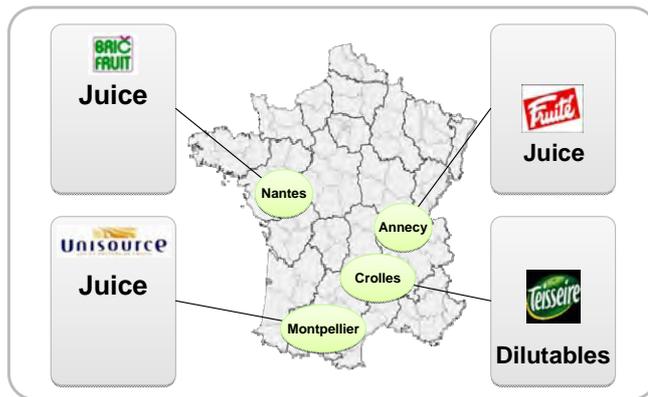
Clarity On The Revenue Drivers

Delivering The Synergies By 2013

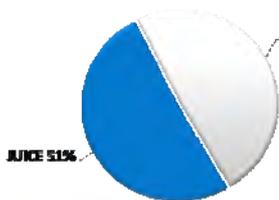
CLEAR GROWTH POTENTIAL

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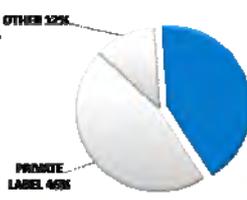




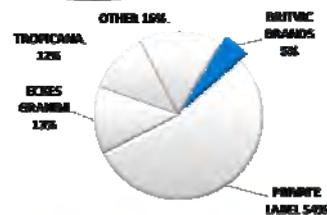
REVENUE



Share of Dilutables



Share of Juice



Source: IRI Census data (Total Suppliers – Grocery only) MAT October 2010

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We Are Now Fully Integrated



- **Britvic France is now fully operating**
as part of the Group
- **Finalising our first full 3 year strategic plan**
for the business
- **Commencing new initiatives & projects across the business**
particularly in the Supply Chain and Commercial teams
- **Preparing for French Business Transformation to commence**
within the next 12 months and be completed by 2013
- **Delivering strong business growth**

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Sales By Channel

Concentration In Grocery

	DILUTABLES	JUICE
Grocery	85%	70%
Foodservice	-	15%
Pubs, Bar & Restaurants	4%	0%
Impulse	0%	8%
Export	11%	7%

Significant Distribution Opportunities

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A Developing Portfolio: Dilutables

The image displays a variety of Teisseire dilutable products. On the left, there are several categories: 'Fruit and Vegetable' (three bottles), 'Sirop pour le sport' (two bottles), 'Teisseire 0%' (one bottle), 'Fraicheur de Fruits' (two bottles), 'Teissi' (one bottle), 'Bar' (two bottles), and 'New drinks' (three bottles). On the right, there is a 'Tradition' category (one bottle), a 'Bio (organic)' category (one bottle), and 'Sirops à idées' (five bottles). The Teisseire logo is prominently displayed at the top left of the product grid.

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A Developing Portfolio: Juice

BREAKFAST & VITALITY	ORGANIC & WELL-BEING	FASHIONABLE FLAVOURS	MULTIPACK
 <p>ORANGE</p> <p>MULTI-FRUIT</p>			

A Diverse Branded Portfolio

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The Role Of Private Label

Dilutables

- 32m litres (45% of volume)
- Private-label activity allows us to be the category captain and additionally to:
 - Monitor entire market
 - Strengthen relationships with retailers



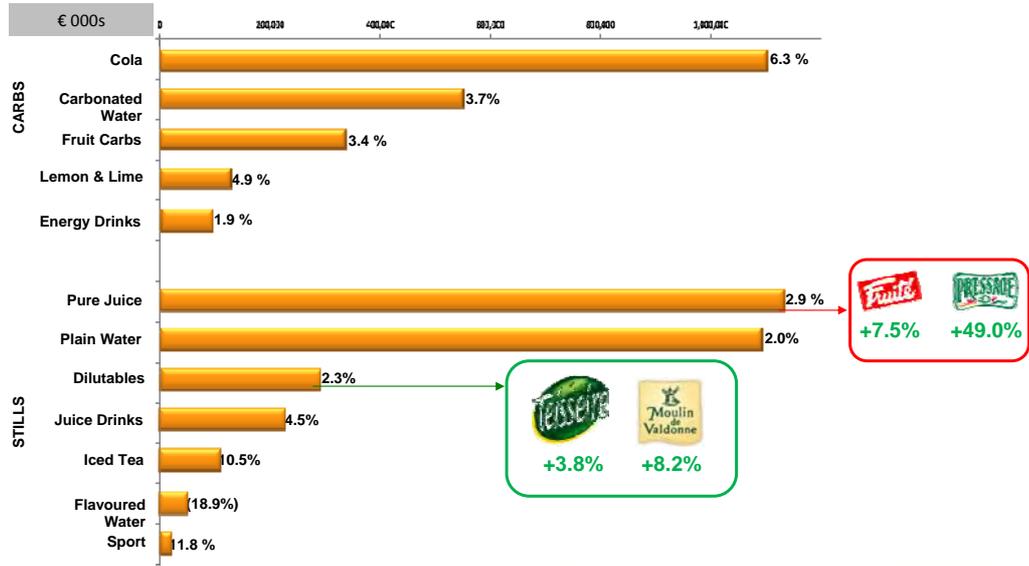
Pure Juice

- 164m litres (76% of volume)
- Produced mainly for hyper & supermarkets
- Private label is c.70% of the juice market
- Has optimised production utilisation

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Market Value And Growth Rates

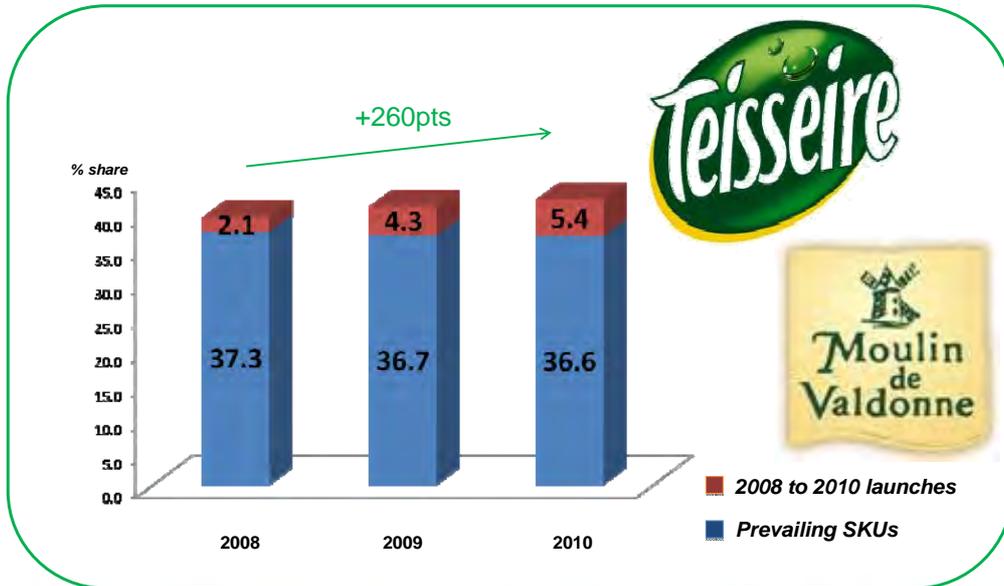


Source IRI Take Home Grocery MAT 28 NOV 2010

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Value Share Growth: Dilutables Brands

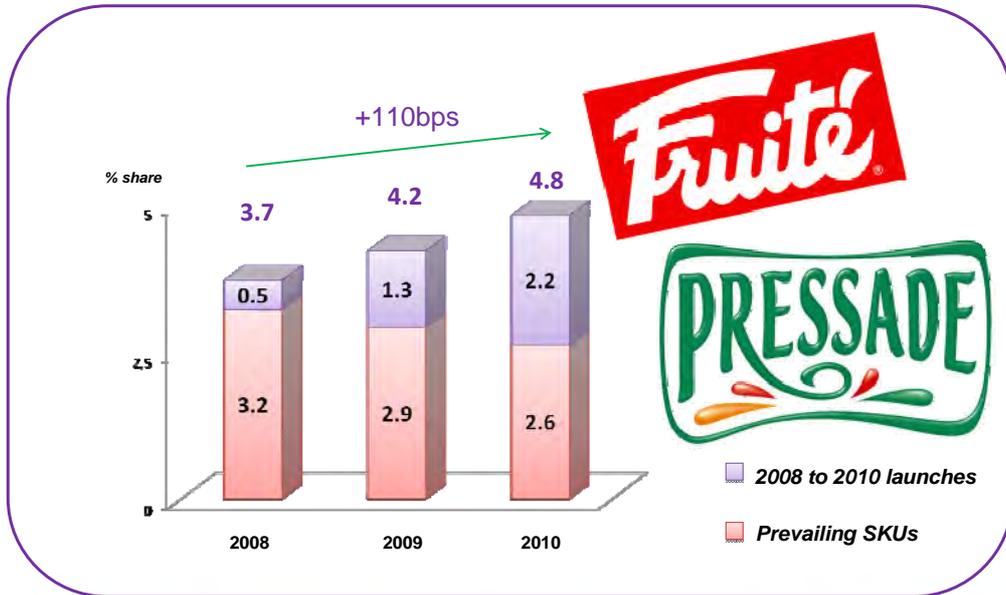


Source IRI Take Home Grocery MAT 12-2010

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Value Share Growth: Pure Juice Brands



Source IRI Take Home Grocery MAT 12-2010

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What We Are...

Today

*A Very
Dynamic
Company*

INNOVATION

ICONIC BRANDS

REACTIVE

BUT

we are **SMALL** in a
BIG category (Juice)

we are **BIG** in a **SMALL**
category (Dilutables)

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What We Want To Be...

Tomorrow

We want to be **BIG** in a **BIG** market

A disruptor who injects dynamism into the market

A major player in branded soft drinks

Bringing fresh ideas & excitement to our customers & shoppers

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Brands Strategy

DILUTABLES: a strong and profitable leader in the category

Drive sustainable value growth for our brands and the category

JUICE: two challenger brands in a major category

Building a diverse and profitable portfolio

TOTAL SOFT DRINKS: a €13bn market

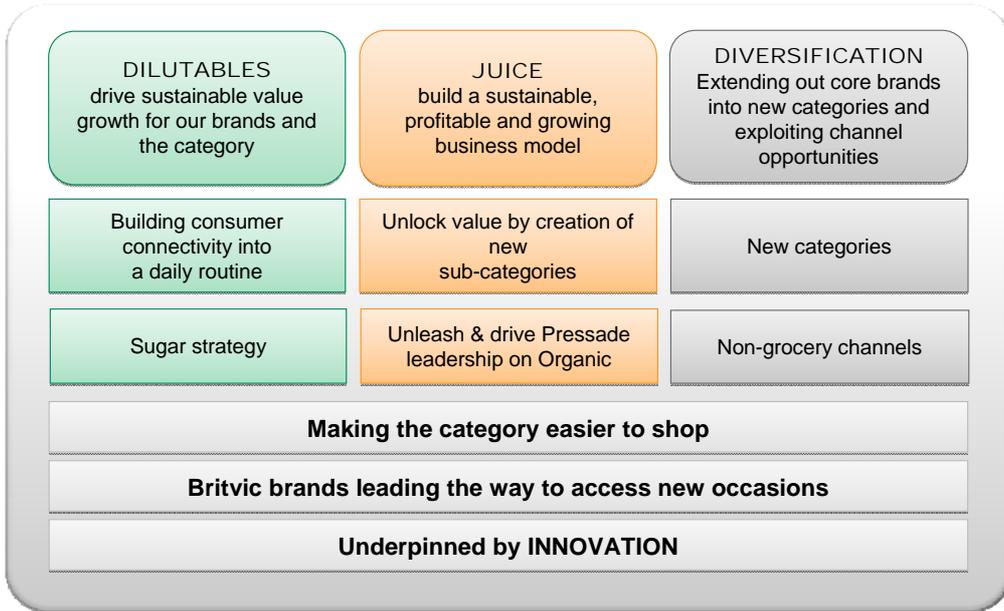
To be a major player driving growth by:
1. Innovating into new categories
2. Driving our brands into new channels

Source: Euromonitor

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Key Growth Drivers



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The National Launch of Fruit Shoot

DEVELOPING THE KIDS DRINKS CATEGORY



A WINNING CONCEPT (No.1 in UK)



 +

A FRENCH TOUCH

 =







DRIVE TRIAL AND DEVELOP BRAND AWARENESS

In store support :
sampling & promotion



On TV
from June to Aug



Launching into the
Impulse market



Source Nielsen Take Home Grocery MAT 19 FEB 2011

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2011 Innovation: DILUTABLES

INNOVATING THE CORE BRANDS: TEISSEIRE & MOULIN DE VALDONNE

2 NEW FLAVOURS 75 cl LAUNCH



- Citrus
- Cranberry

A NEW RECIPE 70 cl LAUNCH
« Orchard Fruits »

Innovation with interesting flavour combinations



NEW : 0% WITH STEVIA



+ 2 new flavours



ORGANIC RANGE : A CHANGE OF FORMAT

50 cl → 70 cl



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2011 Innovation: DILUTABLES

Lemon Is A Key Flavour In The French Market



- To drive growth in the lemon sub-category
- Brand awareness in excess of 80%
- A real new challenger:
 - A smaller pack format to meet consumer needs
 - 3 flavours : Lemon, Lime and Organic Lemon



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2011 Innovation: JUICE

Meeting The Needs Of Consumers

Mon Jus d'Ici
1st 100% French-origin Juice



SUSTAINABILITY



PR



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2011 Innovation: JUICE

PRESSADE : GROWTH THROUGH NEW CATEGORIES

OUR FIRST ORGANIC
JUICE DRINK
IN THE PORTFOLIO



COMPELLING CONSUMER
ENGAGEMENT



MAGAZINES & NEWSPAPER



DIGITAL



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A Strong Launch Programme in 2011

New Brands



Brand Extensions



Pack & Experience



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Synergy Delivery

COST SYNERGIES

1. Procurement & Supply Chain
2. Business Transformation

REVENUE SYNERGIES

1. Launch of Fruit Shoot
2. Transfer of Capability

THE ORIGINAL PHASING

€m	2010	2011	2012	2013
Synergy Savings (Cum ongoing)	0.2	4.1	13.6	17.3

Delivering By 2013

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Key Messages

A Clear Opportunity To be BIG in a BIG Market

Distribution, Group Brands and Innovation
Driving The Top Line and Margin

We Will Deliver The Synergies
By 2013

Growth Led By The Top-Line

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Britvic Ireland: The Outlook

Andrew Richards, Managing Director



Agenda

Time To Look Beyond The Short-Term

Clear Competitive Advantages

4 Defined Revenue Drivers

NEW GROWTH DELIVERY

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The Challenges - Tide Was Out for Ireland



*Banking crisis &
IMF bailout*

Unemployment rising

Disposable income down

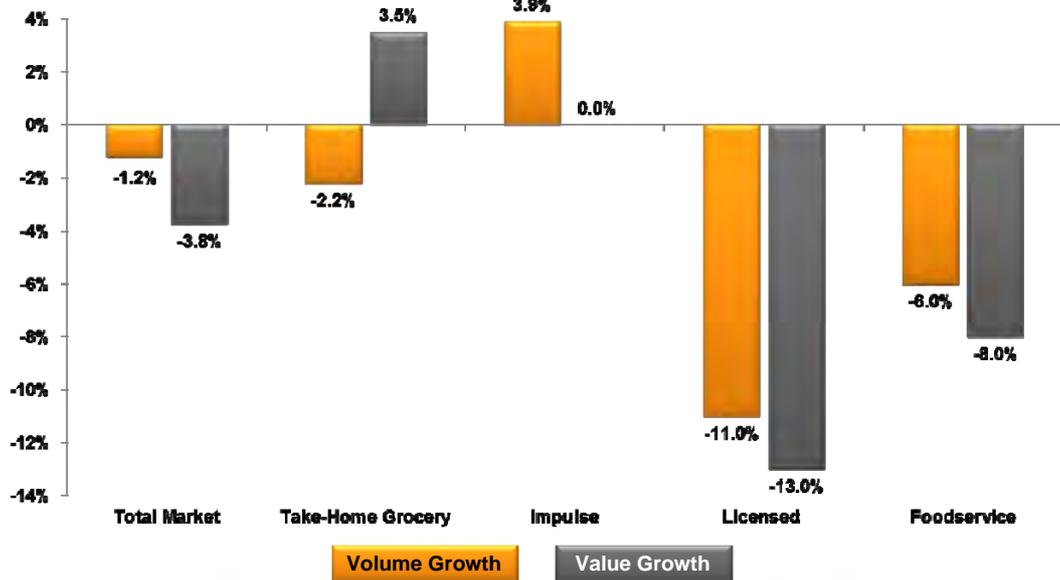
*Consumer confidence at
record low*

*Impulse and Licensed
channels badly hit*

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Prevailing Market Challenges



Source: Nielsen, Kantar & BI Estimates October 2010 to February 2011 (YOY growth)

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Our Vision For Realising Growth

**Talented People.
Powerful Brands.
Winning Performance.**



- Two years of internal restructuring
- *Investment in people, systems and processes*
- Recruitment of new talent
- *Leaner, fitter and more agile*
- Primed for growth

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Business Transformation

Business Transformation changed almost everything that underpins how we make, market and sell our brands

- **Systems:** *changed all core IT systems that support business operations*
 - SAP - all-function impact
 - Siebel - Commercial system for Order capture and Promotions planning),
 - EBP - Procurement system (e.g. Purchase Orders)
 - APO - Demand Planning
 - BBW - Reporting
 - HSS/MSS – HR enabling
- **Process:** *changed all underlying business processes use to run business: Production, Logistics, Finance, Commercial, HR*
- **People:** *drove capability by demanding development & adoption of new skills & behaviours*

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Business Transformation

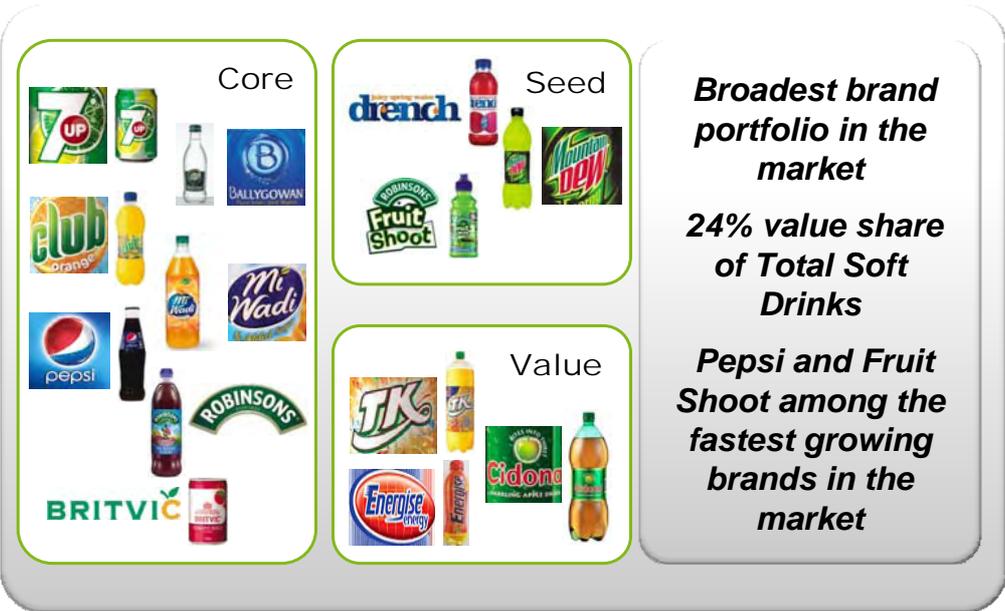
*Delivered financial, efficiency, effectiveness
and cultural benefits*

- **Financial**
 - *Reduced operating costs, improved working capital*
- **Efficiency**
 - *Production & logistics planning*
 - *Sales forecasting accuracy*
- **Effectiveness**
 - *Commercial promotions planning – improved Revenue Management*
 - *Procurement controls*
 - *Management information*
- **Cultural**
 - *More open, integrated, cross-functional ways of working = better information exchange, better decision making.*

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An Envable Brand Portfolio

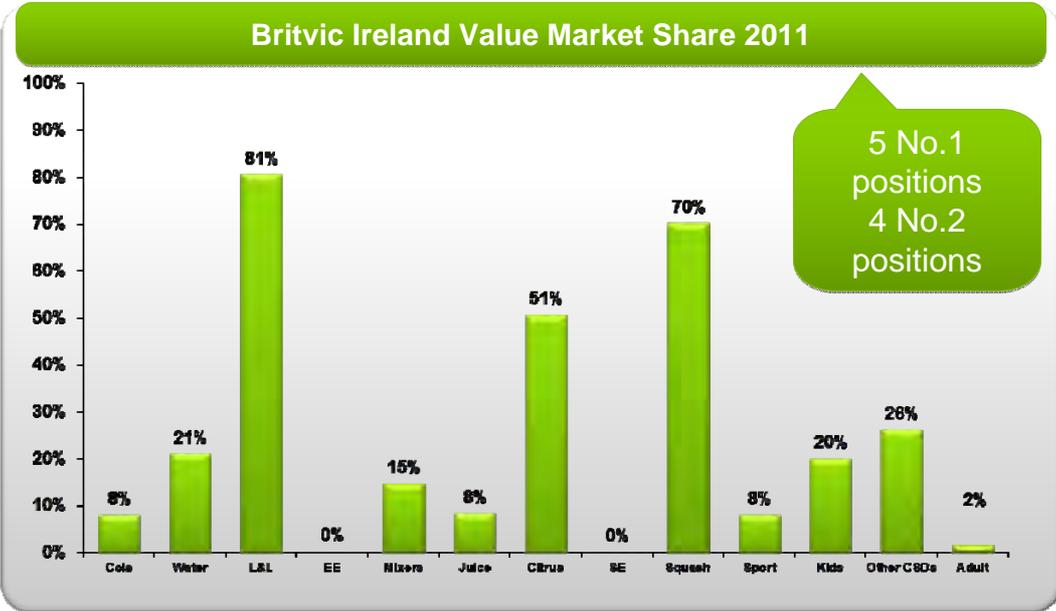


Source: Nielsen, Kantar & BI Estimates MAT Jan 2011

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Strength in Depth

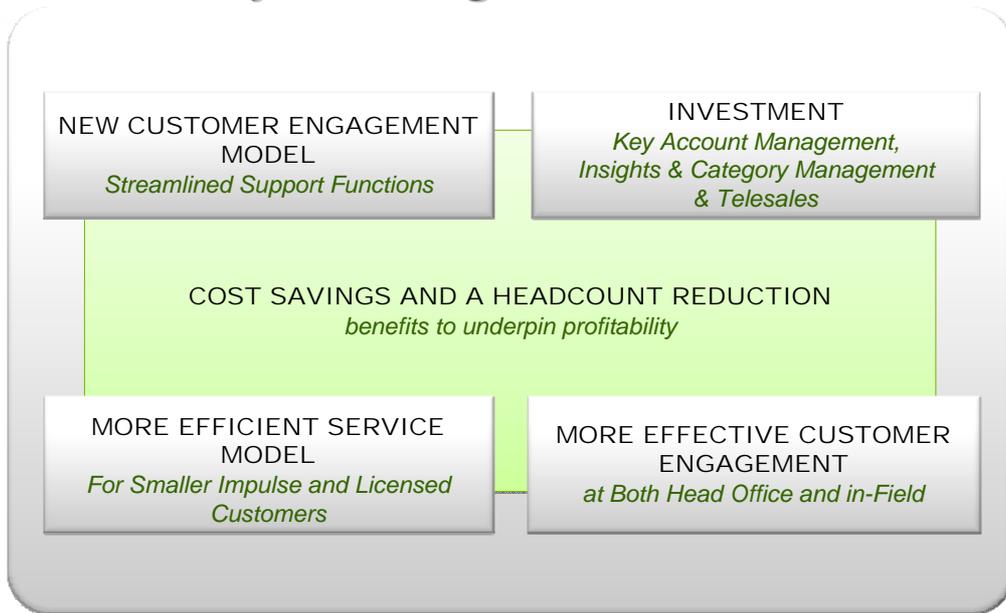


Source: Nielsen, Kantaur & BI Estimates MAT Jan 2011 Island of Ireland

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A New Way Of Doing Business



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Revenue Growth Drivers

Customer Engagement Model



Innovation Pipeline



Driving Availability



Revenue Management



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Customer Engagement Model

Our Vision is To Become An Indispensable Partner For Category Development For Our Most Important Customers

INSIGHT



**Unrivalled
Category
Expertise**

IDEAS



**Thinking –
Category,
Consumer &
Shopper**

SOLUTIONS



**Driving Growth
For Us and
Retailers**

PARTNERS



**Challenging &
Supporting
Retailers**

Insight-led Solutions-focused
Execution-driven

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Customer Engagement – Category Leadership

From 4 to 9 Category Leadership Positions In 1 Year

OUR INFLUENCE 1 YEAR AGO					Store	OUR INFLUENCE TODAY				
Carbs	Squash	Water	Kids	Impulse		Carbs	Squash	Water	Kids	Impulse
	●				TESCO <i>Every little helps</i>		●			
	●				DUNNES STORES	●	●	●		●
	●		●		SuperValu Centra		●		●	
					SPAR					●
					O'Briens					●

Leadership: Driving Distribution

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Innovation Based On Key Consumer Trends

Fluid lives 

"I want to stay in control of my busy life and make sure I am at my best for the challenges the day presents"

Quest for health and wellness 

"I want to be in control of my health and wellness, to manage or improve it through making better choices"

Making the most of life 

"I need to balance the stresses in my everyday life with experiences that are fun and fulfilling"

Consumers in control 

"I like to pursue better value, to help maintain my lifestyle and to get the most from the money I have"

Sustainable lives 

"I would like products that create less negative impact on the world; I want choices that make me feel good without harming my wallet"

Keeping it real 

"I am looking for products and brands that are real and authentic, because they have stood the test of time and remained true to their heritage; they provide me with comfort and reassurance"

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A Strong Launch Programme in 2011

New Brands



Pack & Experience



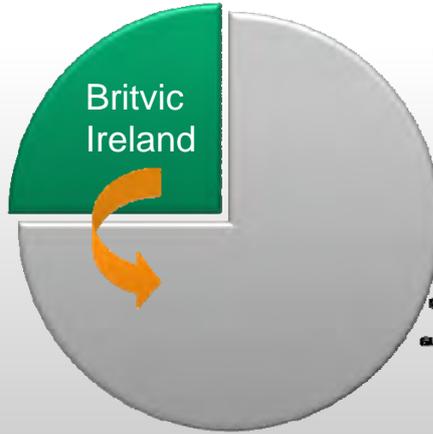
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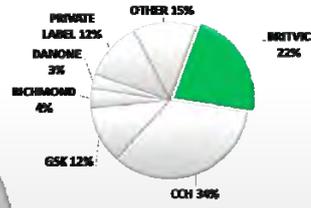
A Material Distribution Opportunity

**Total Soft Drinks Market –
Island of Ireland: €1.5bn**

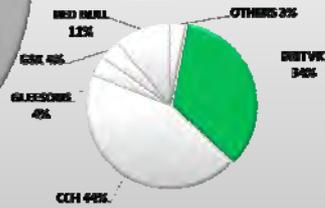
A 1% share gain is worth €8m extra per year in sales revenue



Irish Take-Home (€365m)



Irish Licensed (€360m)



Source: Nielsen, Kantar & BI Estimates MAT Jan 2011 Island of Ireland

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Channels To Market In Ireland

Multiples	Licensed	C&I	Food Service
<ul style="list-style-type: none"> Retail value €365m Share - 28% Number 2 Private label share of 11% (c.34% in GB) 	<ul style="list-style-type: none"> Retail value €360m Share - 34% Number 2 Huge advantages as a wholesaler 	<ul style="list-style-type: none"> Retail value €500m Share - 22% Number 2 An enviable single-serve portfolio 	<ul style="list-style-type: none"> Retail value €280m Share - 10% Number 3 Learnings from the GB business
			

'On-The-Go' represented only 24% of our sales revenue in 2010

Source: Nielsen, Kantar & BI Estimates MAT Jan 2011 Island of Ireland

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On-The-Go Opportunity - Impulse

On-the-Go is a large, profitable, youth-centric market.
Britvic Ireland, at 16% value, share lags behind both major competitors

Consumer Choice



Putting the right range & layout in top coolers

Golden Triangle



Hotspot coolers with rate of sale programme in top outlets

Front Of Store



Distribution drive & rate of sale programme

Source : Nielsen Rep of Ire MAT Jan 2011

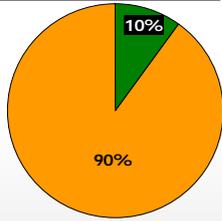
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On-The-Go Opportunity – Foodservice

Foodservice Beverages Share

Foodservice Market Estimated **100ML** per annum



■ BI Food (IOI) ■ Market (IOI)

Beverage Needstates



Contract Wins Ireland



Our Foodservice Channels

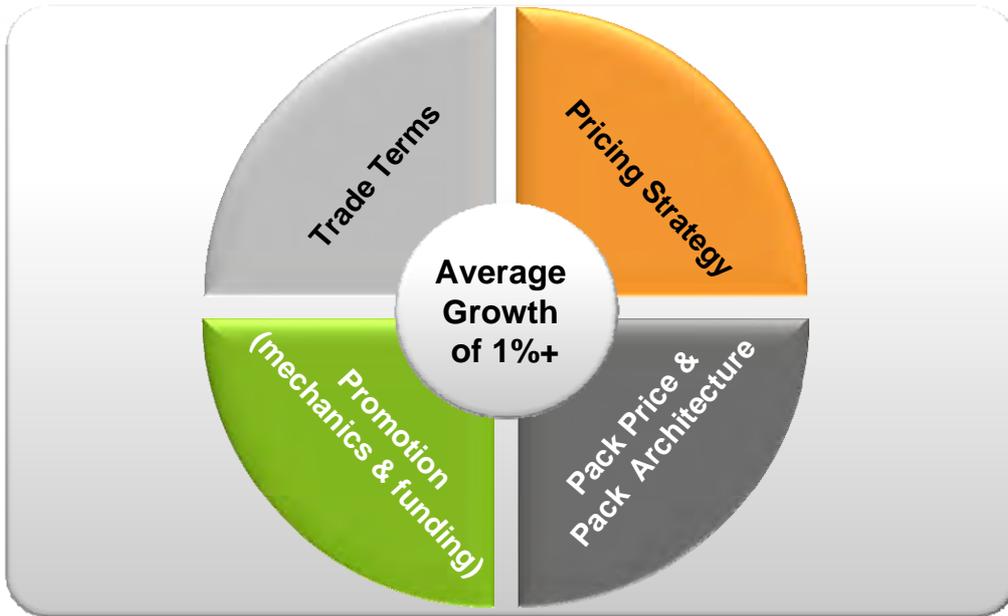


Source: BI Estimates

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Revenue Management: ARP Growth



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Revenue Management: 2011



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Key Messages

Time To Look Beyond The Short-Term

Clear Competitive Advantages

4 Defined Revenue Drivers

NEW GROWTH DELIVERY



Break



The Global Opportunity

Simon Stewart, Group Marketing Director



Agenda

The Strategy

The Brands We'll Use

Progress To Date

THE POWER OF THE PORTFOLIO

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The Strategy

Markets With Scale Opportunities

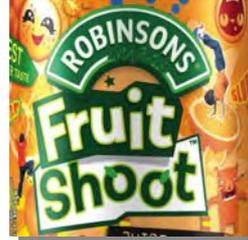
Focus On Dilutables, Kids & Adult

Securing Local Partners

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The Ambition



Our Wholly-Owned Brands
Have Global Appeal

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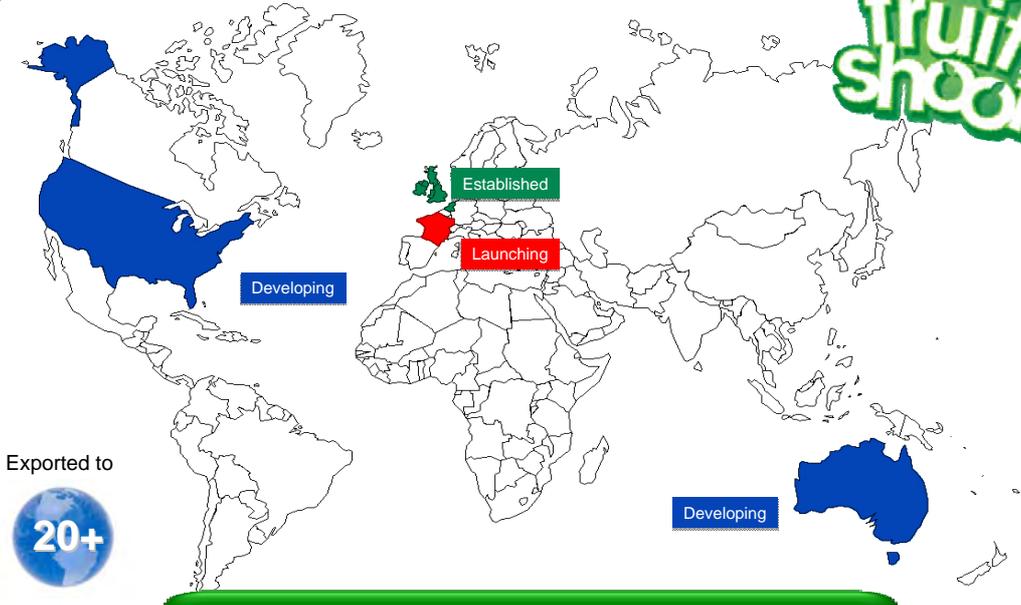
The Fruit Shoot Strategy



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Fruit Shoot Markets



A Premium Brand With Global Appeal

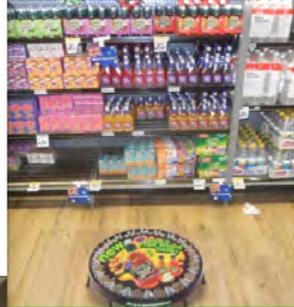
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Fruit Shoot Has Global Appeal



Sweden



Australia



USA



Netherlands

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Overview Of The Australian Market



- 3.7bn litres
- £6.3bn Soft Drinks Market
 - ½ the size of GB
- Value growth of 3.5%
- Per cap consumption 170 litres
- Apple and Tropical are the lead juice flavours



Source: Euromonitor 2010

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Bickford's Strong Soft-Drink Portfolio



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Australia – Our First Franchise Model



- Listings secured in all 3 national grocers
 - Distribution up to 95%
- Listings also secured in the petrol and convenience channel
 - Listings in a 1000 outlets



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The Australian Pack Range



Developed For The Australian Market

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Achieving Great In-Store Visibility



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A&P Is Raising Awareness



The collage features several promotional items for Fruit Shoot:

- A banner with five 'Kids on the go' tags hanging from a string.
- A screenshot of the 'Australian for Life' website with a 'Become a ripper' headline.
- A 'LIFESTYLE' magazine cover.
- An 'FMC FAMILY MOVIE CHANNEL' logo.
- A 'Disney CHANNEL' logo.
- A 'ROBINSON'S Fruit Shoot' poster with a 'New!' starburst.
- A 'ROBINSON'S Fruit Shoot Kids on the go' poster.
- A 'FOX8 HD' logo.
- A 'back to school' banner with 'Fruit Shoot' branding and 'FITS IN YOUR LUNCH BOX' text.

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Why So Confident About Australia?



	<i>Fruit Content</i>	<i>No artificial colours</i>	<i>No artificial flavours</i>	<i>No artificial sweeteners</i>	<i>Brand Appeal</i>
	25%	✓	✓	✓	✓
<i>Competitor A</i>	35%	✗	✗	✓	?
<i>Competitor B</i>	25%	✗	✗	✓	?
<i>Competitor C</i>	5%	✗	✗	✗	?

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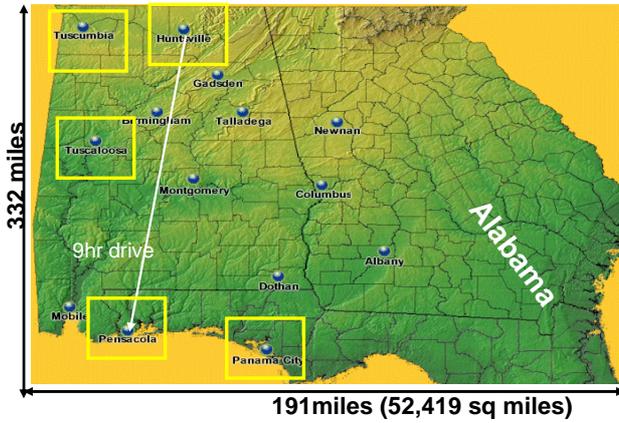
A New Entrant Into The US Market



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Buffalo Rock's Heartland is Alabama



- Major independent Pepsi bottler
- Comparable in size to Britvic
- Reputation for bringing innovation to market
- Broad carbs and stills portfolio

**Rate Of Sale +24% YOY, And Accelerating
61% Distribution In Convenience & Gas**

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Buffalo Rock – In-Store Execution



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Bespoke US A&P



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2011 – Driving Consumer Engagement



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The Dilutables Market Is Global **BUT** Diverse



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The Dilutables Strategy



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Dilutables Leadership In 3 Markets

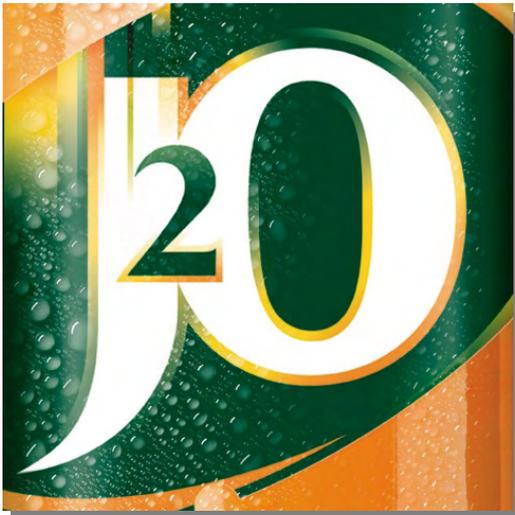


Expertise In The Dilutables Category Gives Us
A Major Competitive Advantage

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Driving Our Wholly-Owned Juice-Drink Brands



1. Created the Adult Soft-Drink Category
2. Number 1 in Pubs & Clubs

Source: CGA December 2010



Most Successful Impulse Launch In the Last 3 Years

Source: Nielsen Scantrack March 2010

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Key Messages

This Could Be Transformational

A Significant Number Of Markets

Strong Brands With Huge Potential

DRIVING INTERNATIONAL EXPANSION

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GB Innovation & Marketing

Jonathan Gatward,
Director of GB Brands & Activation



FY10 Innovation Exceeded Guidance



The 2011 plan *WILL* deliver both Carbs and *STILLS* growth

104



Introducing Robinsons Double Concentrate



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Double-Concentrate Squash A Tool For Driving AWOP



BEFORE DC

AFTER DC



SOURCE : NIELSEN, HOMESCAN, DATA TO 12.06.2010

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NEW Robinsons Double Concentrate: Driving Category Growth



1.25l delivers 50 servings (replacing 2L - 40 servings)
1.75l delivers 70 servings (replacing 3l - 60 servings & 4l - 80 servings)

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Easy Pour Packs: Delivering For The Shopper



EASY POUR PACK

- Pour control feature
- Easy grip handle

c.4% improvement in cost per serve

- 61.3% less PET
- 35.1% less packaging
- 693 tonnes less CO₂ p.a.*

* Source: Based on current year to date average distance loads out of the Britvic factory; Norwich, England

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2011 Launch Campaign



Feb

March

April

May

June

July

TV 'A lot from a drop'



In-store activation

£6.8m Investment

'A lot from a Drop' PR and Digital activity

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Hydro



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Hydro

Driving the Kids category in Sainsbury's

Sainsbury's
The leading UK retailer

Feb | Mar | Apr | May | Jun | July

Partners with DC for
Aug & Sep

BTS

Natural Flavours, Magnesium, Citrus, Sweeteners, BHT/BHA-Free

100% Natural Fruit Flavour

Driving the Kids category in ASDA

Feb | March | April | June / July

ATV Campaign: Mini App

Launch 1st Feb - new packaging

In store Promotions: Off Shelf

Drive Education through May 27th - March 8 Edition

Leverage #1234 - Media to drive awareness and education (see page)

Drive online through #1234 - Media to drive awareness and education (see page)

Online Media: Feature

Driving the Kids category in Morrisons

Jan / Feb | Mar | April | May | Jul / Aug

Push Share Online - Ready for Test markets

ATV Media Campaign

Partner Deal with Free Drink

In store Promotions with 1st Page & Checkout

Working in store 1st Feb - March 8 Edition in promotion



111



The Iconic SoBe Brand Launches In GB



Discover the spirit of South Beach Miami

A Brand Worth over \$640m Globally

112



Pure Rush – A New Approach To Energy



Delicious
fruit taste

Naturally
sourced
caffeine

No artificial
colours
flavours or
preservatives



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V Water Joins The SoBe Family

SoBe



Improved pack
standout

New
flavours

Great
taste

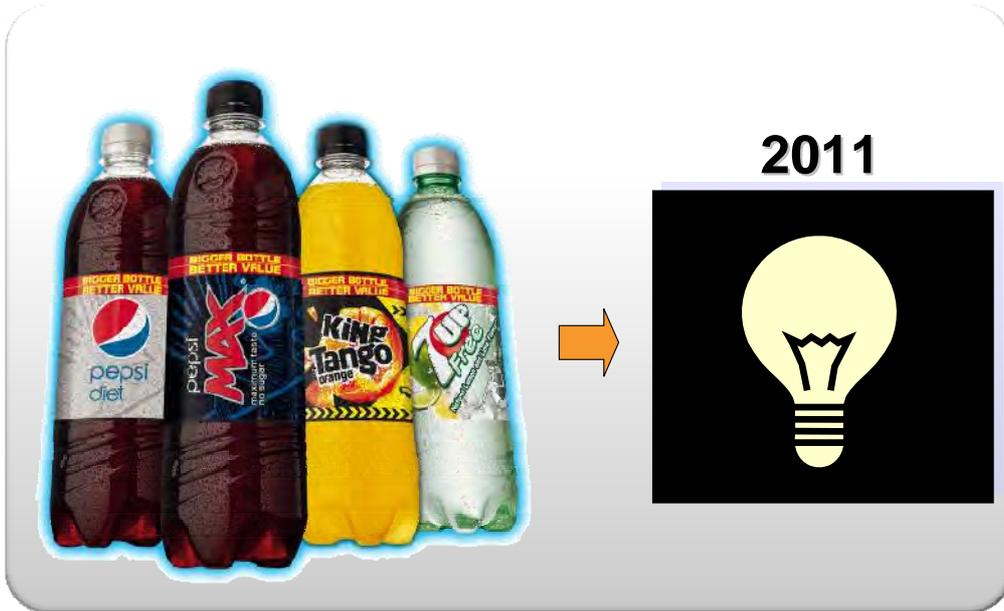
Wider
appeal



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A Major New Carbonates Pack Innovation



115



Focused Packaging - Driving Consumption



116



New Image & Packs for Gatorade



117



Innovating A New Look For 7UP

*Refreshment has a new look
Simple, stand out graphics launch in March*



118



2011 Marketing: Robinsons



WIN A Street TENNIS KIT Every hour

visit www.robinsonsfun.com/wimbledon
See promotional packs for details

*Hourly draw between 8am and 5pm, 12.31.11 until 02.11.11. Internet access required. No purchase necessary. Under 16's require parental/guardian consent. ROBINSONS and the Robinsons PITCH device are registered trade marks of Robinsons Soft Drinks Limited.

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LIVE NATION



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2011 Marketing: Pepsi



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2011 Marketing: Reward Your Thirst



A Loyalty Programme To Drive Further Growth In Our Single-Serve Portfolio



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2011 GB Innovation & Marketing

New Packs



New Brands



New Programmes



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Key Messages

A Huge Step-Change For Robinsons

A Busy Innovation & Marketing Year

Developing The PepsiCo Relationship



Investor Seminar 2011

