



***Packaging Design and  
Logistics two key pillars of  
our sustainability  
journey...***

**December 3, 2008  
John J. Harris / CEO**

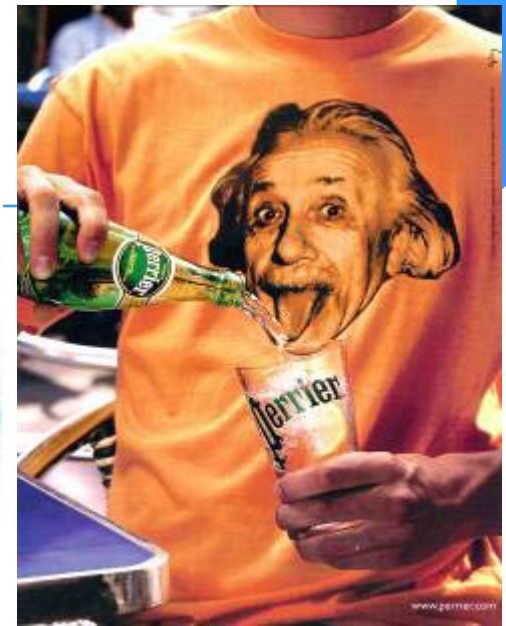


**The Healthy Hydration Company™**

# 1- Nestlé Waters : who we are ?

2- CSR for Nestlé Waters

3- What do we do in packaging and transport ?



# The Healthy Hydration Company

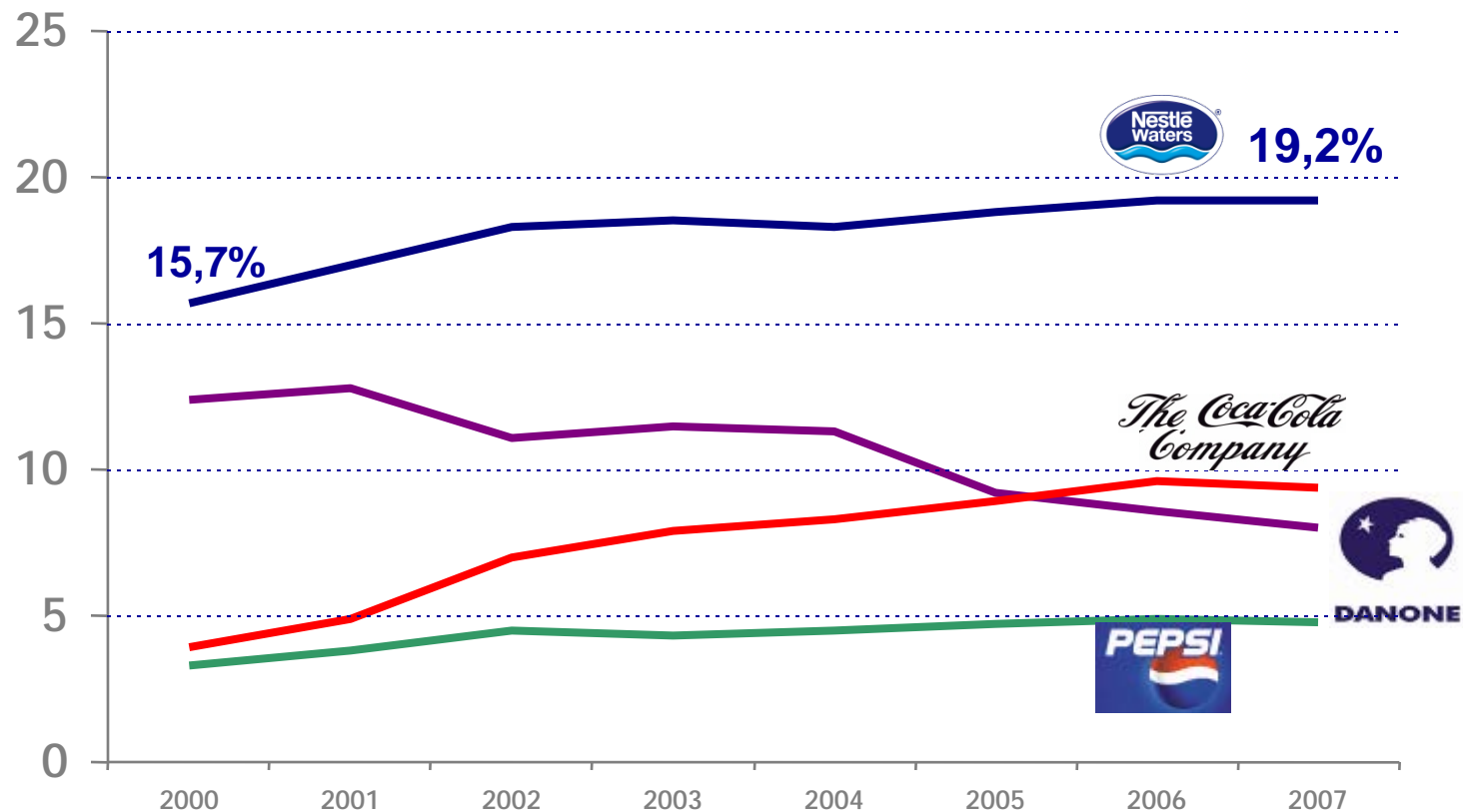


# Key figures 2007

Sales	<b>10.4 billion CHF</b> (10% of Nestlé Group sales)
Organic growth	<b>6.6%</b>
RIG	<b>5.0%</b>
EBIT	<b>851 million CHF</b>
Market share*	<b>19%</b>
Employees	<b>33,500</b>
Factories	<b>100</b>
Producing countries	<b>37</b>
Brands	<b>72</b>

# Nestlé Waters = Global #1 of Bottled Water

- Value Market Share (100% Plain Water)

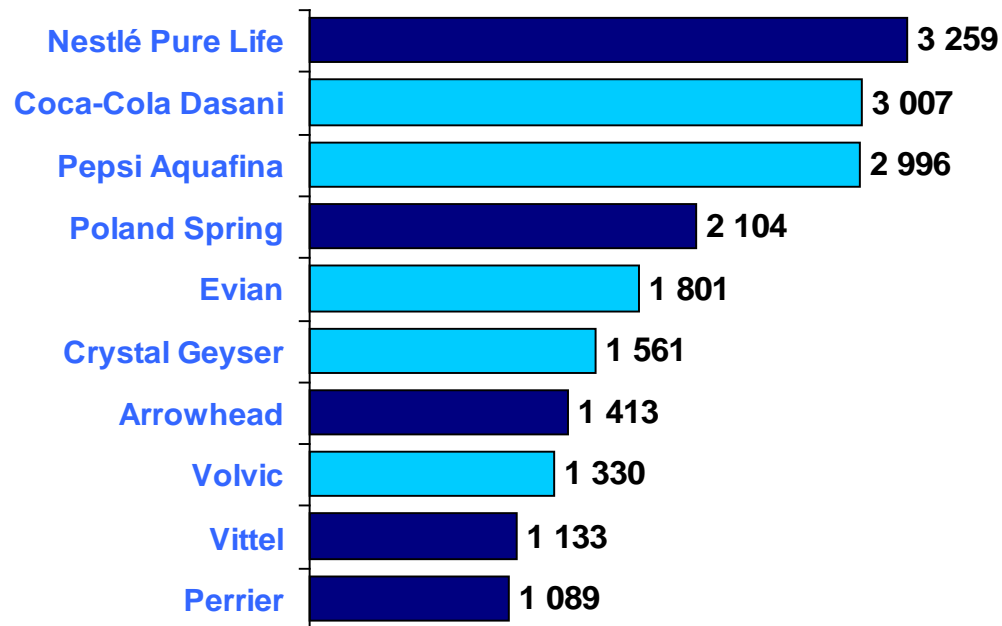


Source: Zenith Report 2007

# Nestlé Pure Life, n°1 bottled water brand in the world

=> 5 out of 10 top Brands are Nestlé

Value in Mio\$ in 2007



Source: Zenith & Nielsen 2007

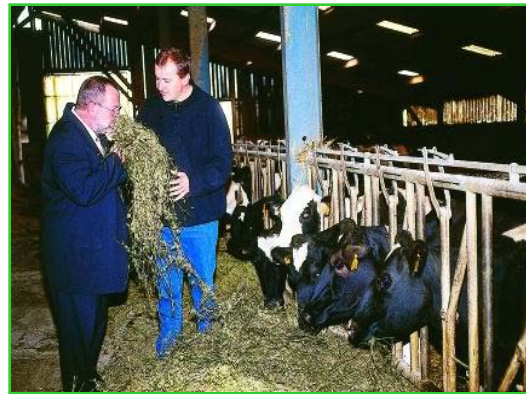
# Good quality water asset

NW has unsurpassed water resources in quantity & quality

- **500 water catchments around the world**
  - about 60 Bo L authorized capacity
  - well protected from surface water contamination
- **Highly secured processes (Nestlé Pure Life)**
- **Advanced technologies / practices in the field of:**
  - water resources exploration
  - management and protection**→ensure a long term sustainability**



305.000 Trees in Santa Maria  
(MEX)



Agrivair – Vittel (FRA)



São Lourenço (BRA)

# Brand portfolio is aligned to key Consumer need states & targets

**STATUS BRANDS**  
"Premium drinking"



**LOCAL BRANDS**  
"Untouched purity"



**FAMILY HYDRATION**  
"Nestlé Quality & Safety"



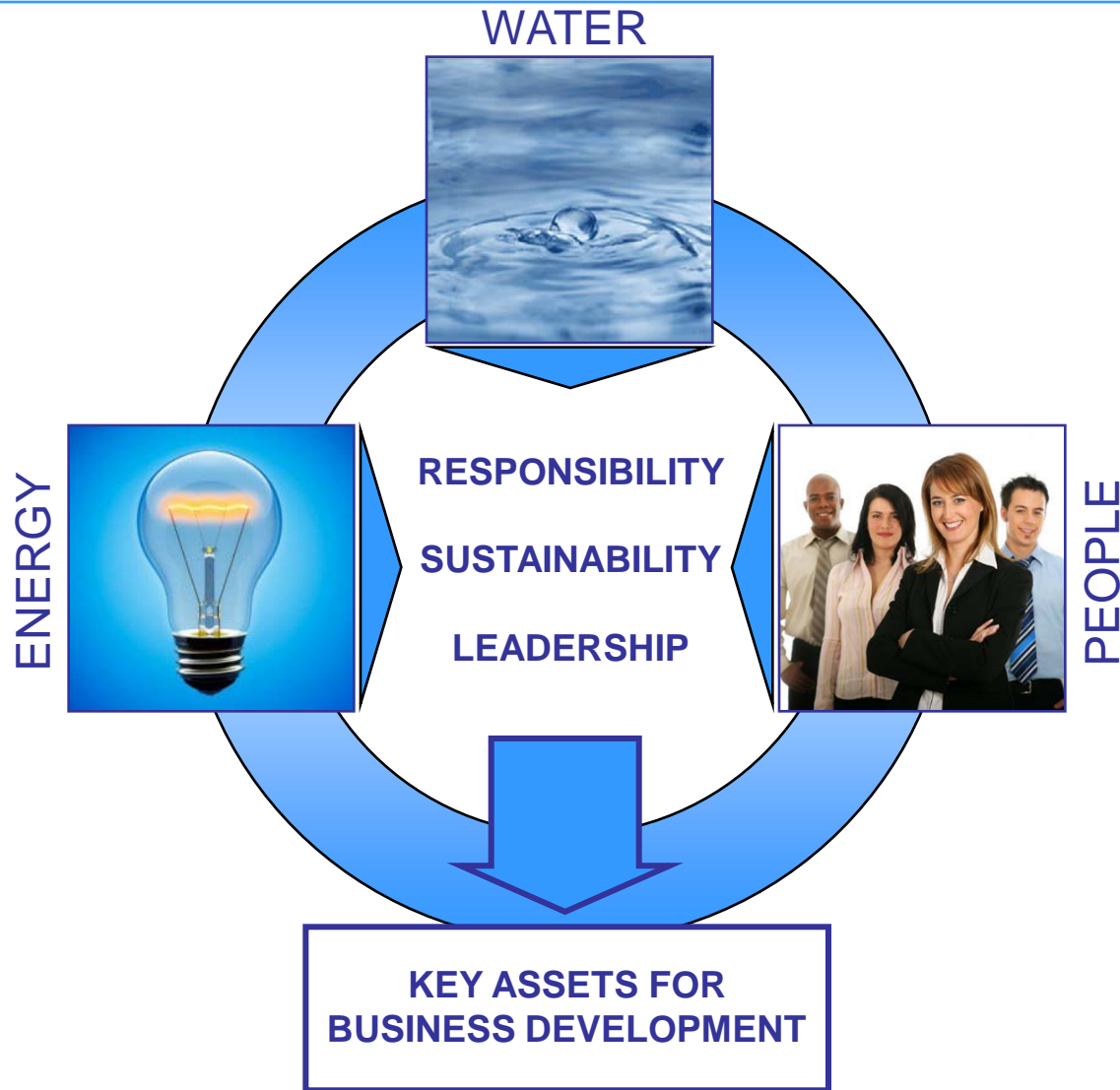


1- Nestlé Waters : who we are ?

## 2- CSR for Nestlé Waters

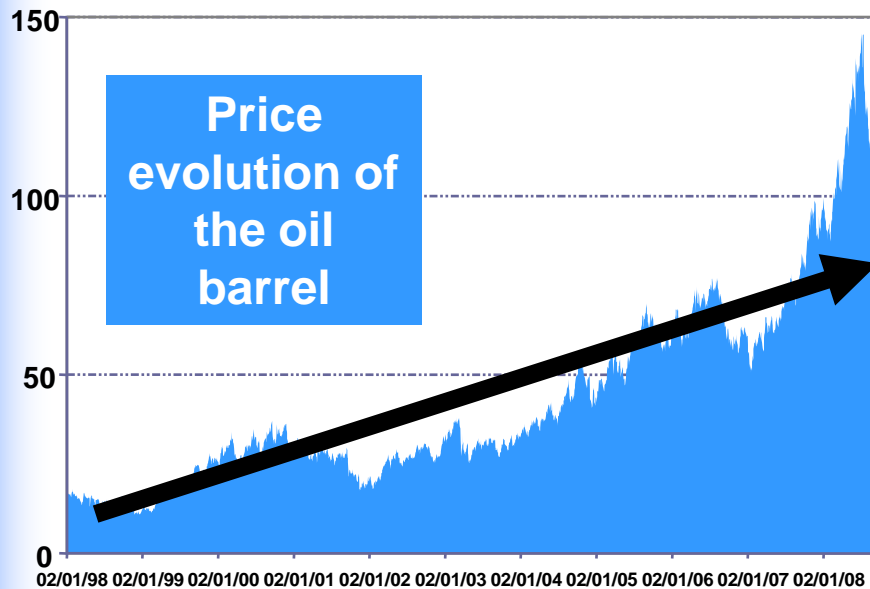
3- What do we do in packaging and transport ?

# Our CSR Framework...

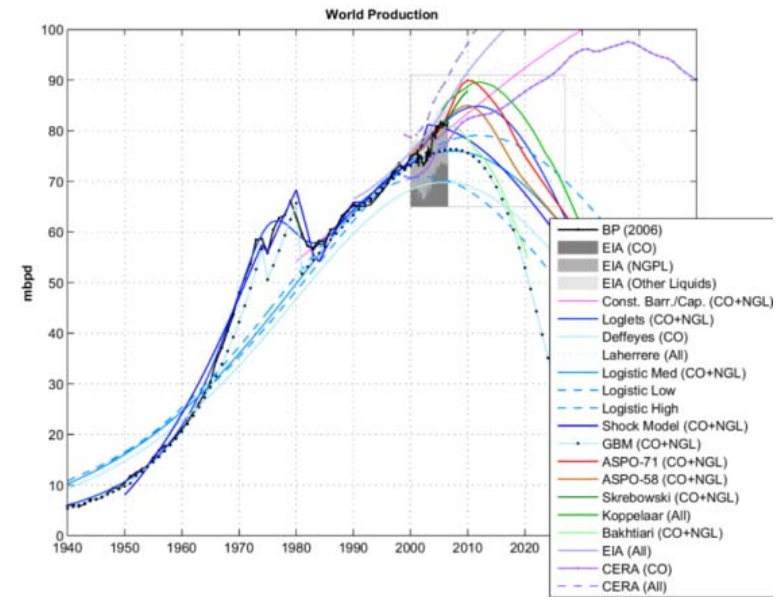


# Sustainability makes long term business sense

## Cost of energy will increase

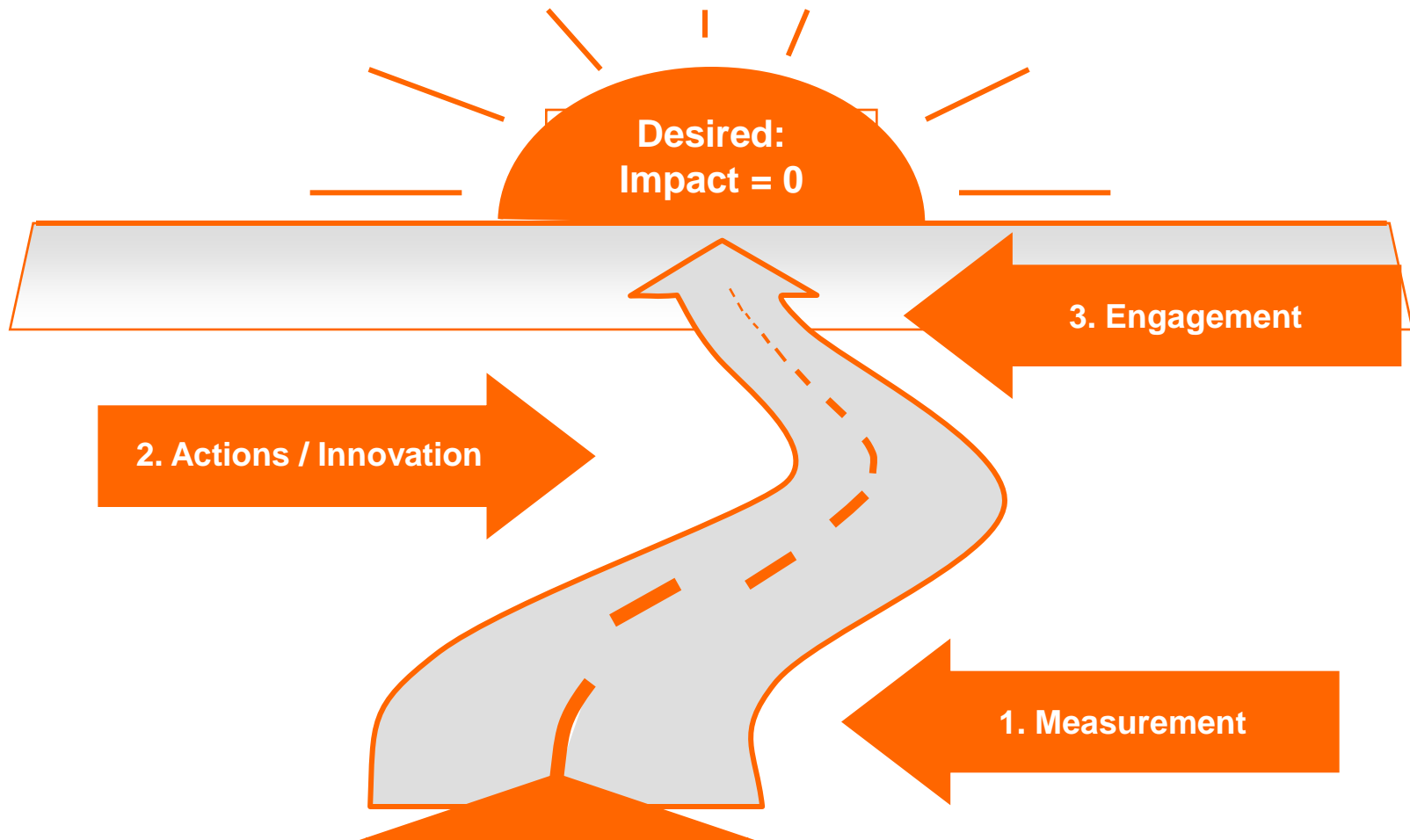


## Fossil fuel is not forever



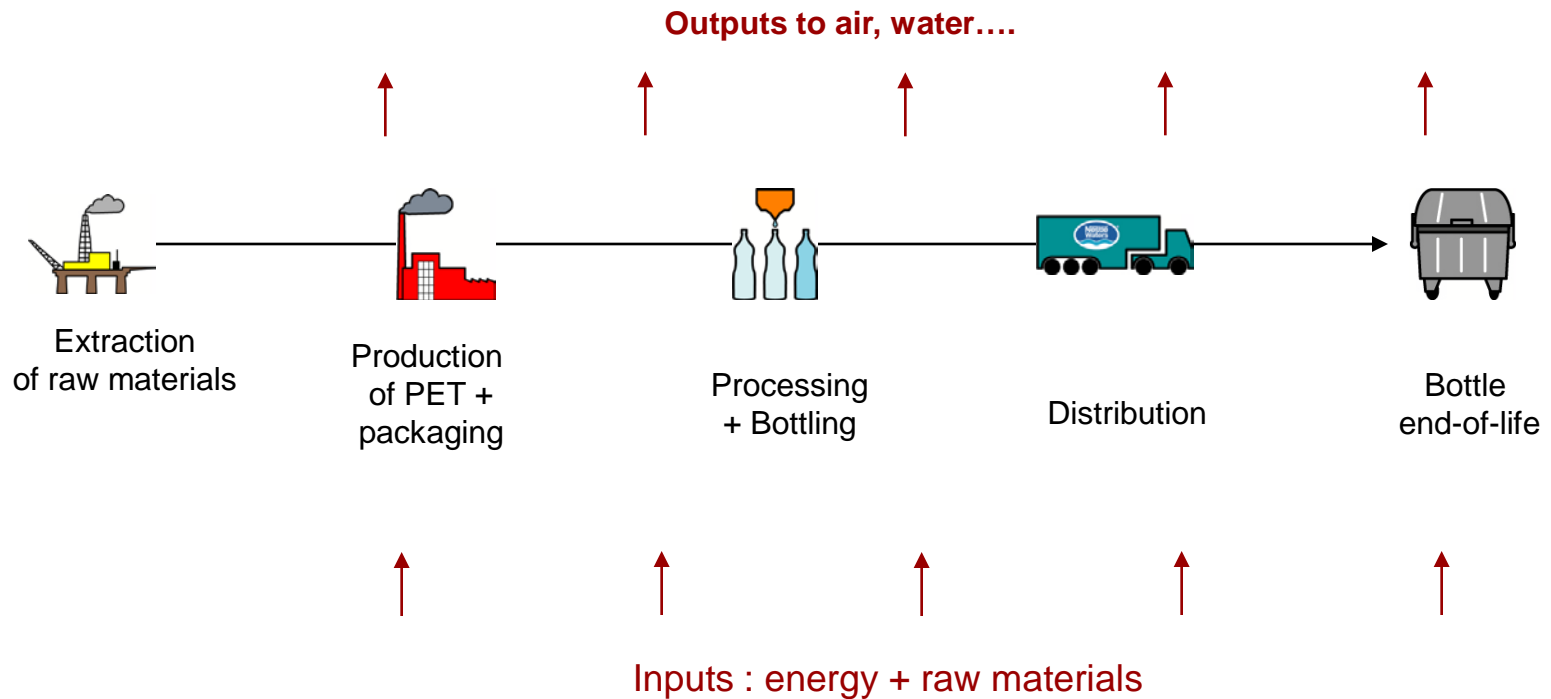
We need to REDUCE the energy we use

# We would want a business with impact 0 on environment: different phases to be addressed

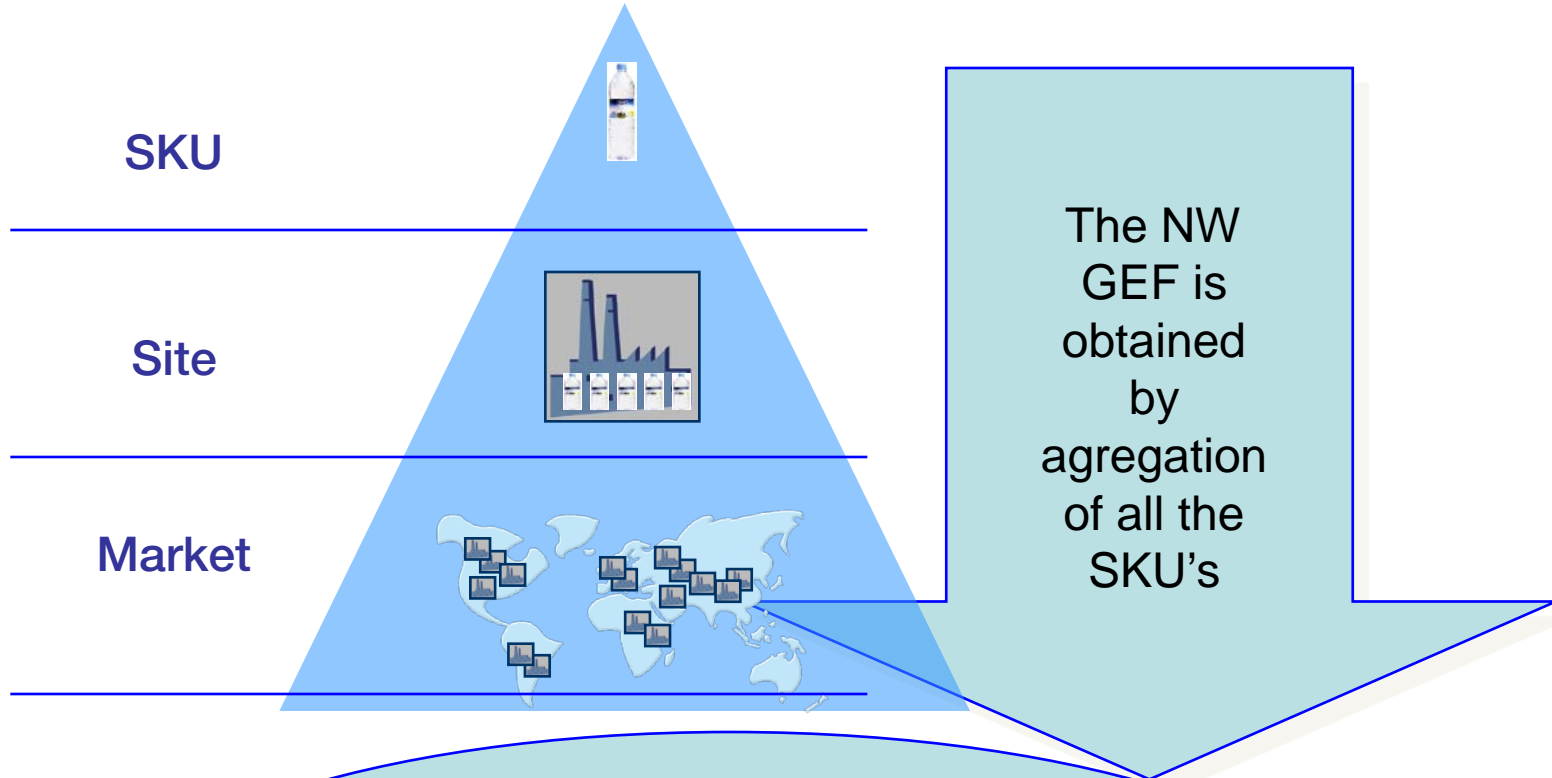


# Life Cycle Assessment (LCA)

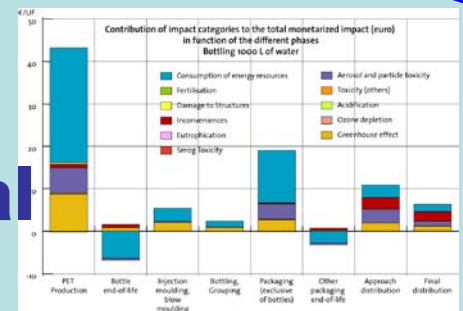
## Environmental impact from cradle to grave



# Global Enviromental Footprint measurement - SKU approach



**NW Global Environmental Footprint**



1- Nestlé Waters : who we are ?

2- CSR for Nestlé Waters

**3- What do we do in packaging  
and  
transport ?**

# Increasing environmental sensitivity.

In some countries Bottled water has turned into a symbol of anti-sustainability





# The bottle

## Our key consumers asset



**Reduce Energy**  
(lightweighting)

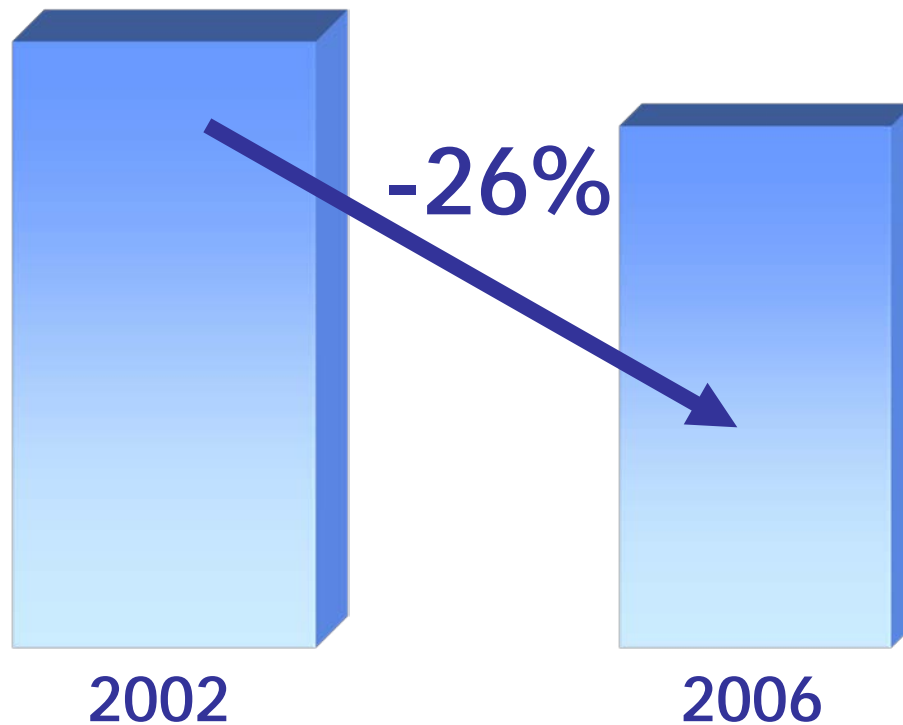
**Reuse Energy**  
(recycle)

**Innovations**  
(new materials)

# 1) Reduce Energy

Use less packaging

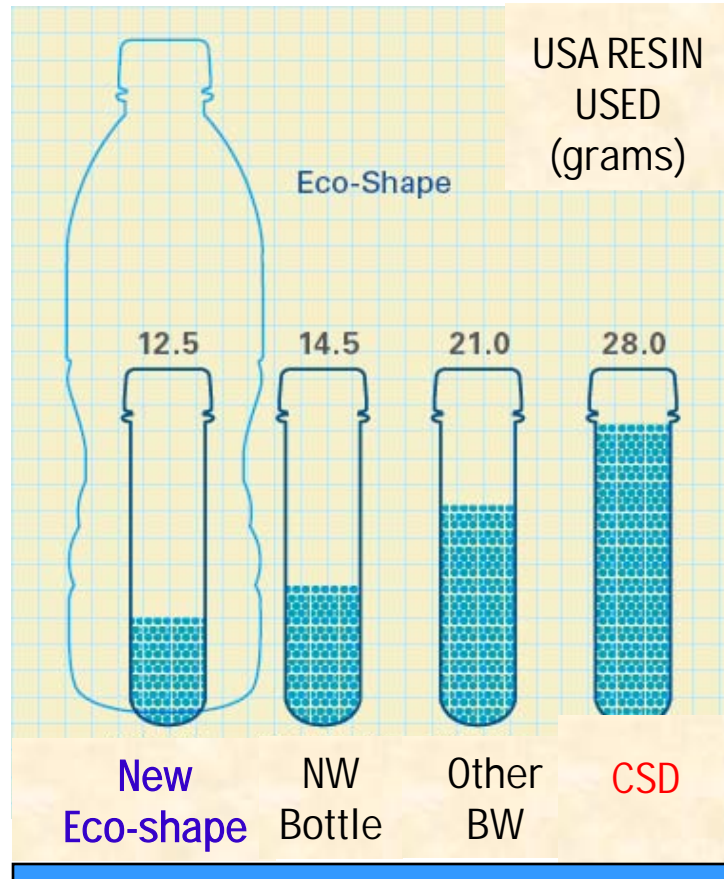
## Packaging weight per L produced



**Update with 2008 data if possible**

# 1) Reduce energy

## Nestlé Waters « Eco-Shape » Best in Class bottle



## 2) Reuse energy

### Our recycling initiatives

Aujourd'hui  
grâce à votre  
geste de tri,  
50%  
des bouteilles  
sont recyclées

**Objectif  
100%**

*Trions plus  
pour  
préserver  
l'environnement.*



 ECO  
EMBALLAGES

 Chambre Syndicale  
des Eaux Minérales

New recycling  
Labeling (FR)



Working with policy makers



Introduction  
of R-PET

## 3) Innovations

### **MINIMIZING NEGATIVES**

### **+ EXPLORING ALTERNATIVES through:**

→ New Design

→ New Materials

### **working with:**

→ Internal R&D Centers, Universities....

# Five key areas of work to substantially decrease NW emissions

5. Explore new technologies

1. Improve transport utilization

2. Manage carriers to reduce their environmental footprint

4. Produce closer to the customer



3. Use alternative transport modes

**« We do not inherit the Earth from our ancestors, we borrow it from our children. »**

Antoine de Saint-Exupéry

