



Pernod Ricard Asia

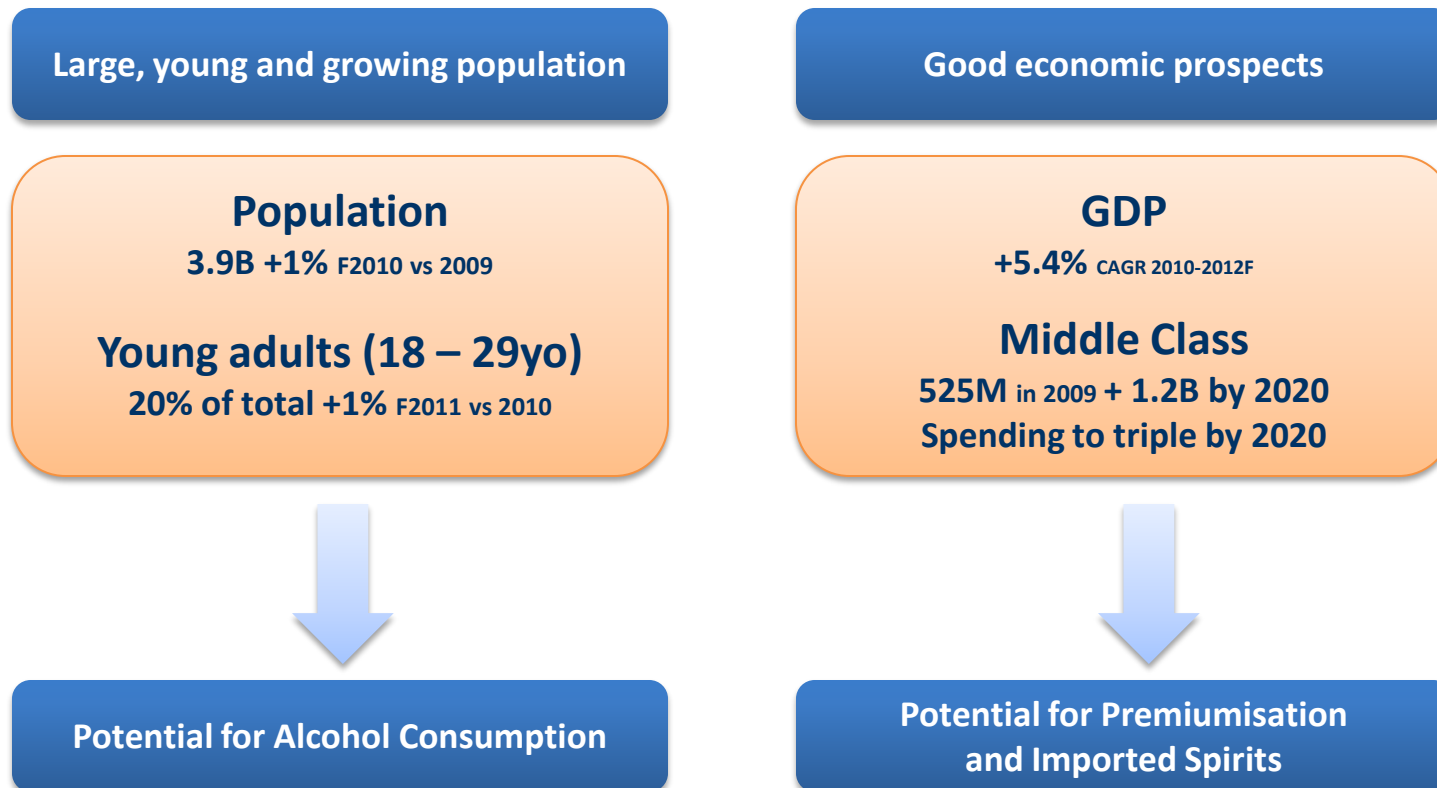
ASIA CONFERENCE



March 21st, 2011

Asia is a dynamic market place with strong prospects

2



Source:

1. Population data based on Asia-Pacific Euromonitor, 2010
2. Population growth rate, (2010 est.) based on CIA World Factbook
3. Young adults (18 – 29yo) growth rate based on Euromonitor 2011F
4. GDP based on HSBC
5. Asia-Pacific Middle Class: based on Purchasing Power Parity (\$10 to \$100 daily household income) "The Emerging Middle Class in developing countries" (Homi Kharas for OECD)

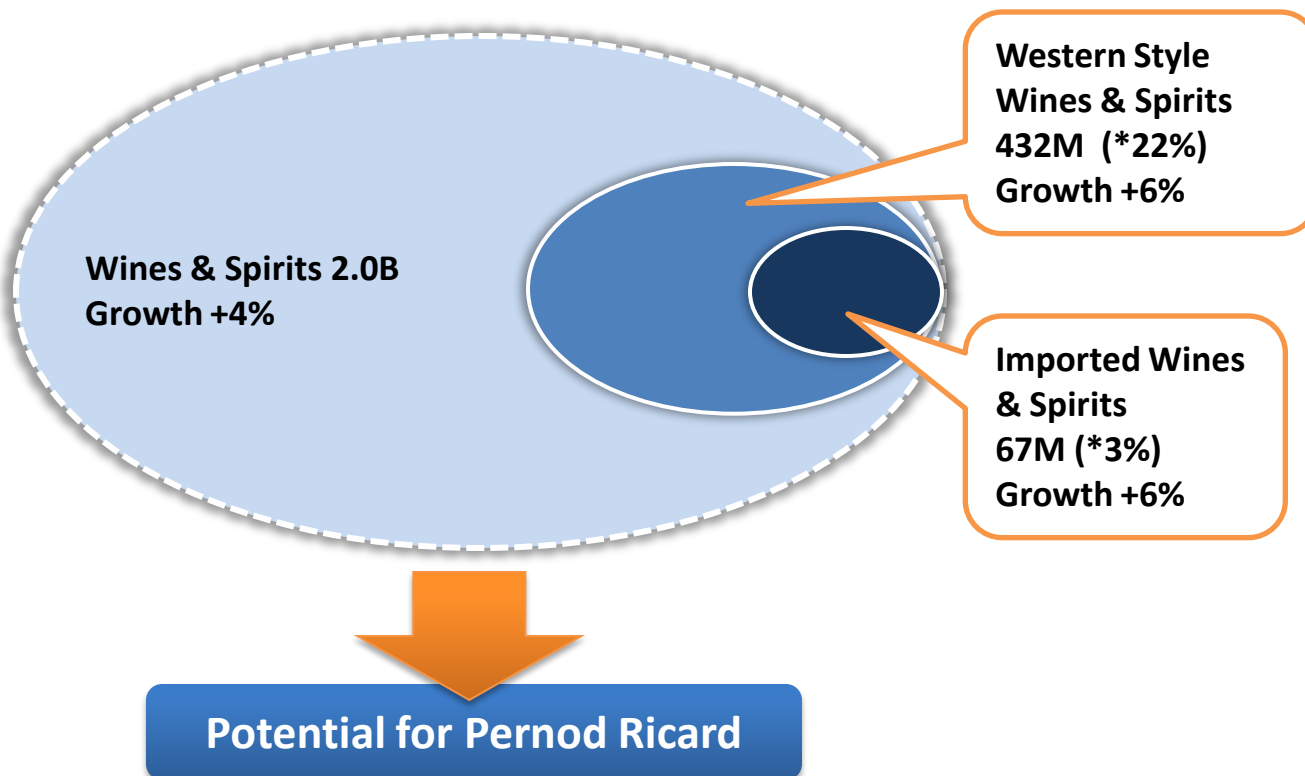
Asia is a dynamic market place with strong prospects

3

Growing Western Style Wines & Spirits but still small percentage of total alcohol

Unit: 9L case
Growth: 2010F vs 2009

All Alcohol
8.5B



Source:

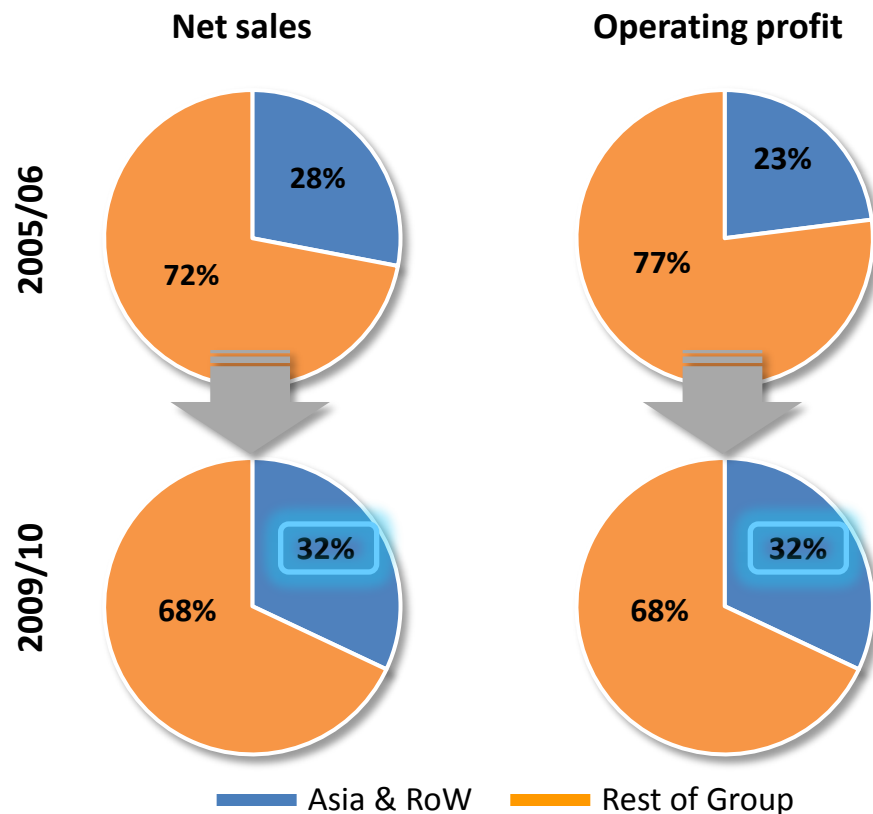
1. IWSR
2. All alcohol include beer, spirits, wine and cider in domestic and DF markets
3. Western style spirits/wine include imported and local spirits and wines in domestic and DF markets
4. Imported spirits/wine include imported spirits and wines in domestic and DF markets

* Based on Wines & Spirits

Asia is the key driver of Pernod Ricard growth

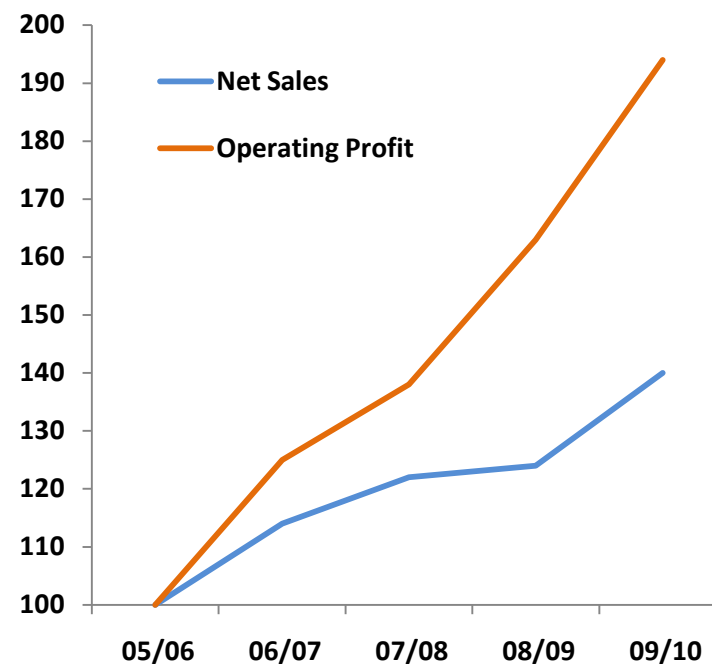
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Asia & RoW vs Total Pernod Ricard



Asia

Index 100 in 05/06

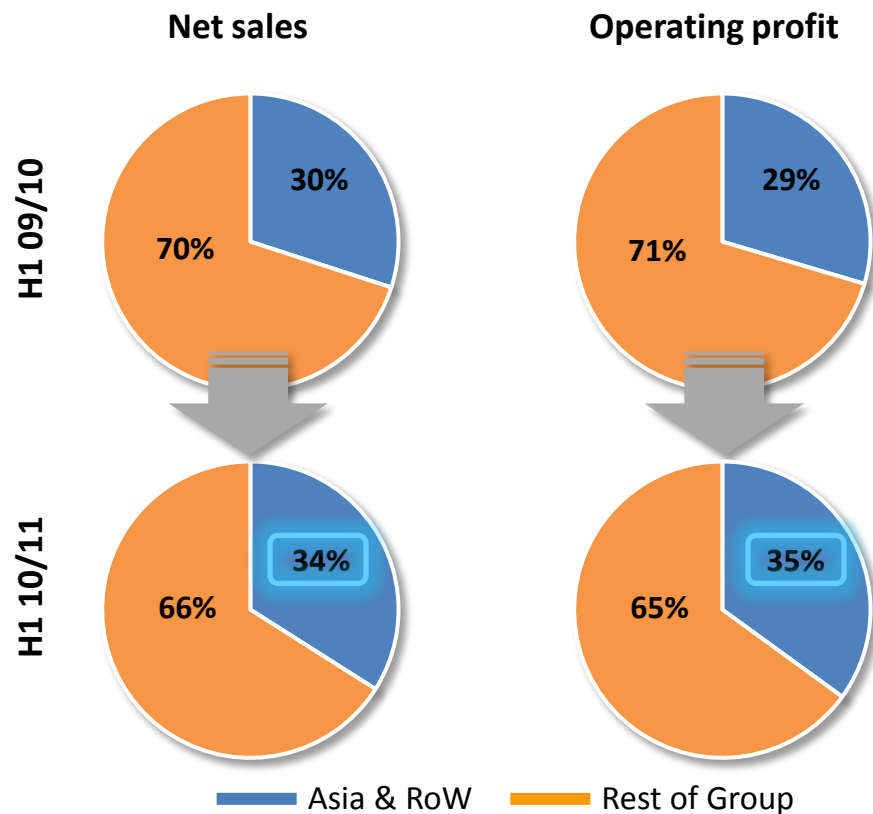


Asia represented 75% of sales within the zone Asia & RoW in 2009/10

Asia is the key driver of Pernod Ricard growth

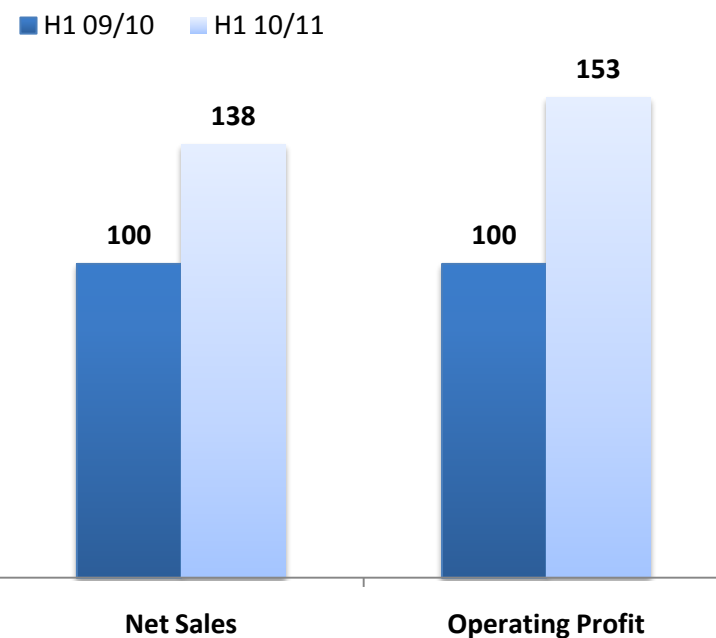
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Asia & RoW vs Total Pernod Ricard



Asia

Index 100 in 09/10

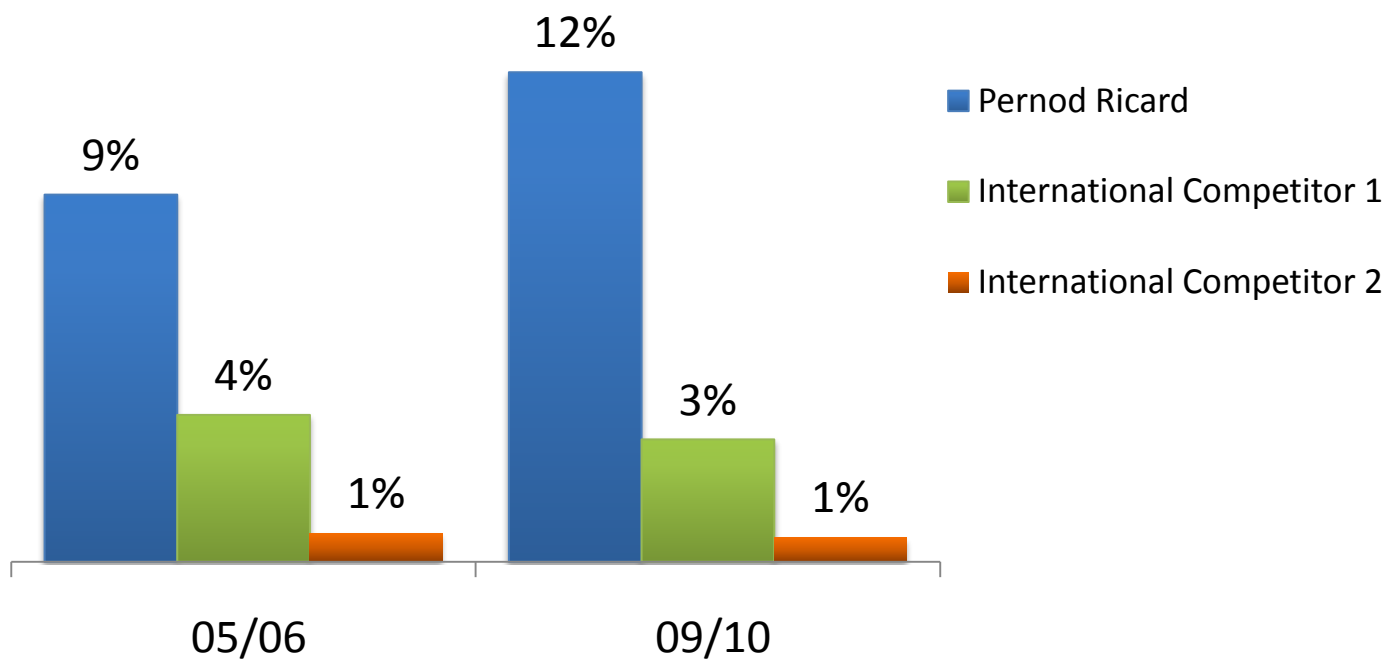


Asia represented nearly 80% of sales within the zone Asia & RoW in H1 2010/11

- **Expanding market share ahead of competitors**
- **The best coverage**
 - Largest owned and managed distribution network – 14 affiliates
 - Leading position in largest markets
- **The best portfolio**
 - Only player combining Scotch, Cognac, Vodka, Local Whiskies and Wines
- **Largest engaged professional team**
 - 5,000 employees (including Pernod Ricard exclusive promoters) out of which 4/5 in sales and marketing
 - True expertise in brand building and customer management
- **CSR involved**

Volume market share

Western Style Spirits



Largest owned and managed distribution network



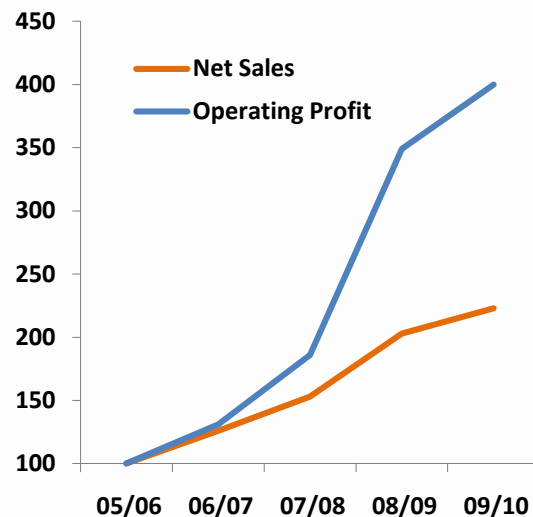
Leading position in the 2 key strategic markets China and India

CHINA

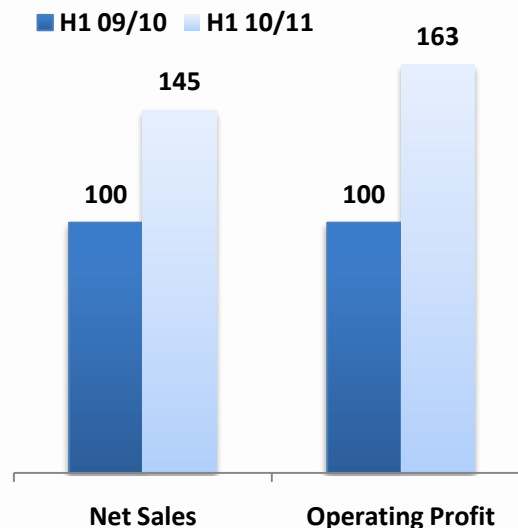
2nd largest Pernod Ricard Market
Market Position: No. 1

Market Share Volume Imported Spirits	05/06	09/10
Pernod Ricard	44%	44%
International Competitor 1	16%	19%
International Competitor 2	16%	14%

Index 100 in 05/06



Index 100 in 09/10



Leading position in the 2 key strategic markets China and India

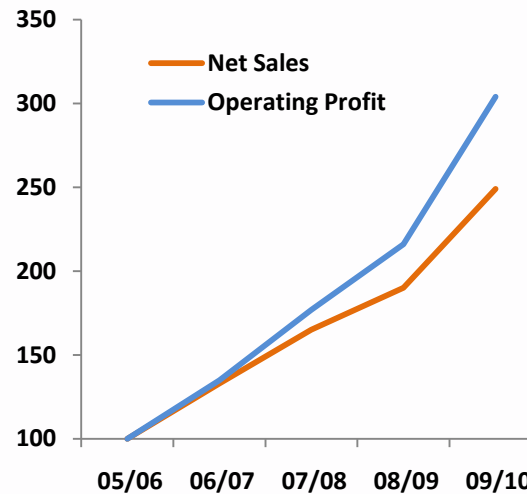
INDIA

5th largest Pernod Ricard Market
Market Position: No. 1

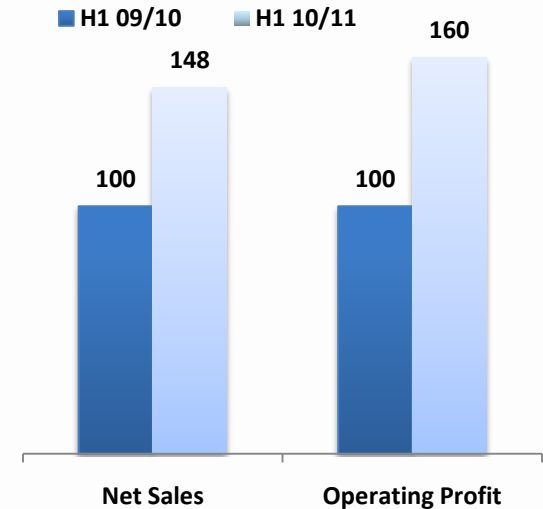
Market Share Volume Operating Segments*	05/06	09/10
Pernod Ricard	37%	42%
International Competitor 1	1%	1%
International Competitor 2	1%	1%

* Imported Spirits and local whiskies > \$6

Index 100 in 05/06



Index 100 in 09/10

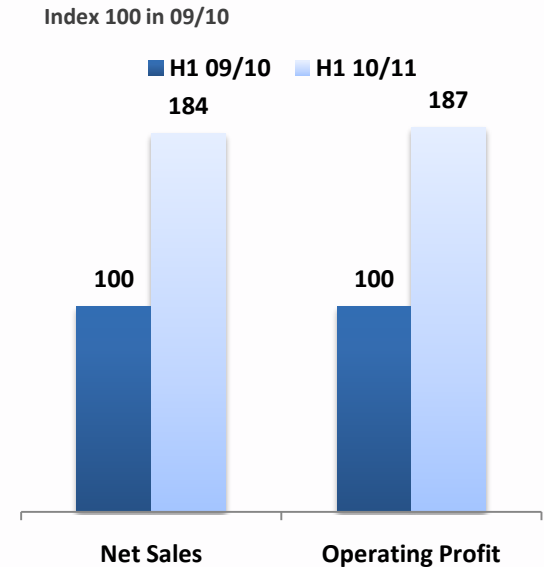
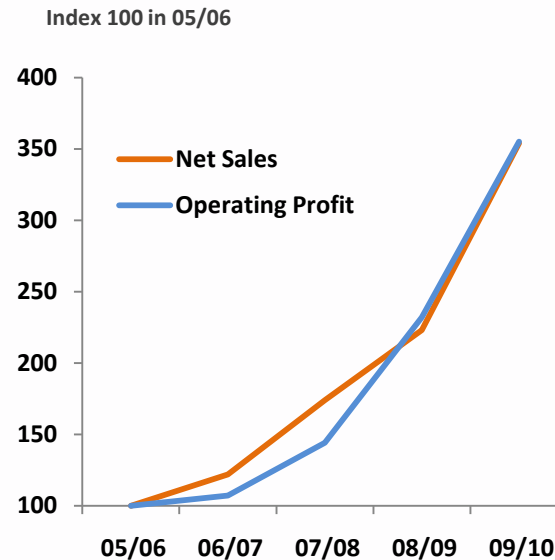


Upcoming leader in a new potential market Set up of Pernod Ricard Vietnam (April 2011)

VIETNAM

Market Position: No. 2

Market Share Volume Imported Spirits	05/06	09/10
Pernod Ricard	16%	28%
International Competitor 1	33%	29%
International Competitor 2	18%	17%



Source: Pernod Ricard Market Estimate, Feb 2011

Strong position in key categories

Scotch Whisky Super Premium+¹

Market Share	05/06	09/10
Pernod Ricard	46%	43%
International Competitor 1	40%	42%
International Competitor 2	0%	2%

Cognac

Market Share	05/06	09/10
Martell	22%	36%
International Brand Competitor 1	46%	41%
International Brand Competitor 2	20%	16%

Vodka Premium²

Market Share	05/06	09/10
Absolut	59%	67%
International Brand Competitor 1	11%	11%
International Brand Competitor 2	10%	7%

Local Whiskies

Market Share	05/06	09/10
Blender's Pride	27%	40%
Premium Local ³ Brand Competitor 1	42%	26%
Royal Stag	26%	30%
Deluxe Local ⁴ Brand Competitor 1	40%	37%

Source: Pernod Ricard Market Estimate, Volume, Feb 2011

1. Scotch market share based on SP (>\$26) and above

2. Vodka Premium – \$ 17 - \$25

3. Premium Local - \$9 - \$12

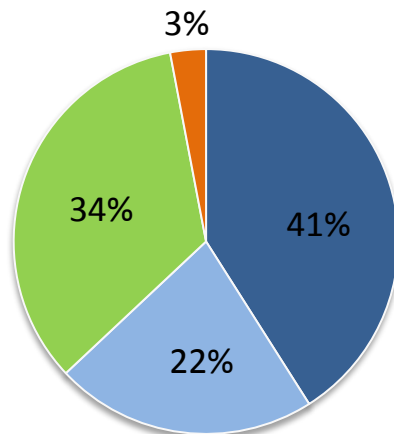
4. Deluxe local - \$5 - \$8

Indisputable leader in Prestige

Prestige - Total

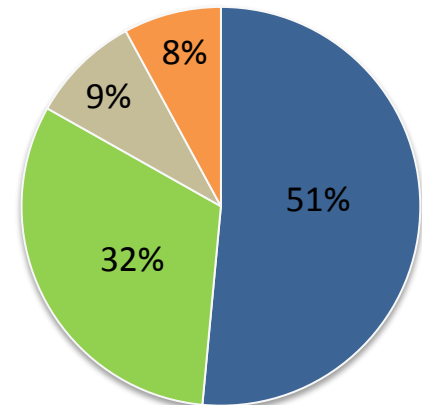
Market Share	05/06	09/10
Pernod Ricard	42%	55%
International Competitor 1	30%	24%
International Competitor 2	9%	8%

Scotch Whisky



■ Royal Salute
 ■ Ballantine's
 ■ International Competitor 1
 ■ Others

Cognac



■ Martell
 ■ International Competitor 1
 ■ International Competitor 2
 ■ Others

Source: Pernod Ricard Market Estimate, volume, Feb 2011

1. Prestige total includes Prestige Blended Scotch / Cognac and above
2. Prestige >\$84

Building Prestige Brands



- **Pernod Ricard ASIA DUTY FREE**
MARTELL BOUTIQUE - Kuala Lumpur Airport Malaysia - Grand Opening 28th Dec 2010
- After Hong Kong Airport in early 2010, the pinnacle in luxury spirits retailing, where consumers not only discover but also live the brand experience
An innovative way of building a true Luxury Spirit Brand

Building Prestige Brands



- **Pernod Ricard KOREA**
ROYAL SALUTE 62 GUN SALUTE launch – Seoul Korea - 30 Sept 2010
- Prestigious event using the latest 3D technology and a targeted media plan to launch this ultimate Royal Salute reference

Building Prestige Brands



- **Pernod Ricard TAIWAN**
MALT & WHISKY GALLERY - Kaohsiung Taiwan - February 2011
- A showcase liquor store in Kaohsiung, Taiwan's 2nd largest city, dedicated to Pernod Ricard's whisky portfolio
Custom-designed Gallery to offer consumers a unique and distinguished whisky education, tasting and purchase experience



Innovation

- Pernod Ricard CHINA
CHIVAS JAMES & JOHN
360 activation
24 Nov-31 Dec 2010
- Launch of a new Chivas Regal range extension dedicated to trendy Chinese Consumers



Innovation

- Pernod Ricard KOREA
**IMPERIAL 19 QUANTUM launch -
16 Nov 2010**
- New design codes coming from the luxury perfume world applied to the new Ultra Prestige reference of Imperial



Absolut Vodka China Limited Edition
ABSOLUT 72变

A Collaboration with 高瑀 & 陈曼

绝对伏特加 中国限量版

酒精度：40%vol

Innovation

- Pernod Ricard CHINA
ABSOLUT 72 TRANSFORMATION - artist Gao u & photographer Chen Man collaboration - July 2010
- Exclusive co-creation with famous Chinese artists appealing to the artists' community and trend setters



International Sponsorship

- **Pernod Ricard ASIA**
BALLANTINE'S CHAMPIONSHIP 2011
pan-regional reach, Blackstones Golf Club – Korea 26-29 April 2011
- Pan Asian activation: (Korea, China, Taiwan, Japan and Asia Duty Free)
Now in its fifth year as title sponsor of the No.1 golf tournament in Korea. Ballantine's gained extensive media coverage both locally and internationally.
- 2010 results
 - Spectators: 20,000 (4 days)
 - Total PR coverage: €2,400,000 (Korea and China only)
 - Website traffic: 125,000 impressions

International Sponsorship



- **Pernod Ricard INDIA, CHINA and GULF ROYAL SALUTE Polo**

The Royal Salute Maharaja of Jodhpur Golden Jubilee Cup (Jodhpur Dec 2010)

The Royal Salute Gold Cup with Liu Shi Lai's new Polo Club (Shanghai & Beijing 2011)

The Nation Cup (Dubai Jan 2010)

- The Perfect Blend of 'The Sport of Kings' with 'The King of Whiskies' within the elite world of luxury polo.

Mega Local events



- **Pernod Ricard THAILAND**
ABSOLUT PARC - Bangkok Thailand - 10 Nov-3 Dec 2010
- 24 consecutive day outdoor brand experience, held in the most prominent location in the heart of the city. Phenomenal brand awareness and exposure to +2 million consumers.
Highlights: ABSOLUT Ice Bar and daily performances by Thai superstars
Total attendees: 20,000

Delivering successful results



- **Pernod Ricard INDIA**
20 M 9LC/ 10 M 9LC ROYAL STAG SOLD IN 2010 - New Delhi - 28 February 2011
- To celebrate this double achievement Patrick Ricard, Pierre Pringuet and Pierre Coppere joined Param Uberoi (Chairman and CEO PR India) in India for this well deserved celebration.

Responsible Drinking



Working with Road Traffic Police Seoul ,
2010

A Leader in Corporate Social Responsibility in 5 key areas

Respecting the Environment



"Water Conservation Project"
India, since 2005

Promoting Entrepreneurship



"One Rupee Fund"
Providing our communities the tools for a
Better future
India, since 1996

Employee Engagement



"CSR Employee Endorsement"
Thailand 2010

Sharing Culture



"Martell Artist of the Year" Awards Ceremony
Fostering local art and sharing the culture
of our brands
Shanghai, 2010



Pernod Ricard Asia

is

best positioned to leverage
Asian growth opportunities