THE CONVIVIALITY PLATFORM STRETCHING GROWTH IN EMEA LATAM WITH FOCUS ON GERMANY AND SUB-SAHARAN AFRICA
AMPLIFYING GROWTH IN EMEA LATAM WITH THE CONVIVIALITY PLATFORM

FOCUS ON GERMANY AND SUB-SAHARAN AFRICA

GILLES BOGAERT
Chairman and CEO PR EMEA LATAM
Transform & Accelerate strategy has driven excellent performance across the region

<table>
<thead>
<tr>
<th>Sales acceleration</th>
<th>Market share gains over 3 years</th>
<th>Strong margin expansion in past 3 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>2X Growth</td>
<td>FY’19-22 vs FY’17-19</td>
<td></td>
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</tbody>
</table>

![Graph showing growth over FY17, FY19, FY22]
Business acceleration fuelled by successful execution of key transversal battlegrounds and active portfolio management...

More from the Core

Win the Whisky War

Expand Beyond

Leverage the Aperitif Opportunity

Boost Prestige Portfolio

Drive Innovation
...with performance enhanced by digital transformation (KDPs) throughout region...
...and an evolving organization balancing consumer centricity, expertise sharing and synergies

1 Innovation Hub

11 Management Entities
Mutualisation, convergence, expertise sharing & efficiencies

Group Centres of Excellence (CoEs)
(consumer insights, supply chain...)

4 IT Hubs (business solutions)
PERNOD RICARD DEUTSCHLAND:
A WINNING MODEL THAT KEEPS REINVENTING ITSELF

JOELLE FERRAN
CFO Western Europe
## PR Deutschland
Very dynamic Sales and share gains over past 3 years

<table>
<thead>
<tr>
<th>Sales Acceleration</th>
<th>Leadership reinforcement</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Net Sales CAGR FY19-FY22</strong></td>
<td><strong>Market Share¹</strong></td>
</tr>
<tr>
<td>Double-digit</td>
<td></td>
</tr>
</tbody>
</table>

### Leadership reinforcement

<table>
<thead>
<tr>
<th>Year</th>
<th>Market Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>A19</td>
<td>12%</td>
</tr>
<tr>
<td>A20</td>
<td>13%</td>
</tr>
<tr>
<td>A21</td>
<td>14%</td>
</tr>
</tbody>
</table>

1. Nielsen
Betting on the right brands at the right moment and building new growth relays to fuel growth...

- **Strong Focus on 4 Star Brands**
- **Active Portfolio Management to further leverage the aperitif opportunity**

- **Boost Prestige Portfolio**
- **Drive Innovation at scale**
...powered by our KDP deployment

<table>
<thead>
<tr>
<th>Year</th>
<th>Marketing Effectiveness</th>
<th>Data empowered Sales team</th>
<th>Prestige New RTM</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY21</td>
<td>matrix</td>
<td>D-STAR</td>
<td>Direct 2 VIP</td>
</tr>
<tr>
<td>FY22</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FY23</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Promotional Effectiveness
Lillet, our success story

2011 – 2015: SEEDING

LOCAL APPROACH

METROPOLE APPROACH

2016 – 2022: FROM GROWTH RELAY TO STAR

NATIONAL “BIG BANG” LAUNCH

BRING THE BRAND TO LIFE

NEW BRAND ERA powered by

>6mLt

>4mLt

>1mLt

1. Sell-Out volumes
Optimizing A&P strategy on best touchpoints

1. Confirmed efficiency of Lillet touchpoints
2. Improved TV media strategy
3. Reduced spend on non-profitable activations
4. Enhanced social networks strategy

Freeing up resources for new product launches

1. Dedicated launch campaigns for new product development
2. Influencer activations
3. Strong ATL & BTL support with fast distribution gains

1. ATL & BTL: above the line and below the line
Focusing on High-end Gastronomy, B2B, Hometainment

Expanding further with products, services & experiences

- Le Cercle platform with exclusive invitation-only access
- CRM tool to personalize 1-to-1 interactions to VIP consumer
- Sales Uplift with higher margins
D-STAR drives sales force to more value-adding tasks, increasing visit efficiency and unleashing growth potential.

**BENEFITS FROM D-STAR**

- **Recommendation of stores based on data and insights**
  - 70% visited
- **Reduction in visit preparation time**
- **Maximization of visit ROI**
  - 4.5/5
- **Unleashing the potential of all the stores**

**HIGHLY ACCEPTED BY SALES FORCE**

- Increased distribution and better execution (promotions, listings and visibility)
Sub-Saharan Africa: AFRICA’S FUTURE IS HAPPENING TODAY!

NTHABIENG MOTSOENENG
Marketing Director of PR SSA

SOLA OKE
Managing Director Western Africa
SSA Landscape and Context

- 4 Clusters
- 7 Affiliates
- 36 Active Markets

Young and resilient population..
PR positioned closer to our consumers..

Sales Acceleration
2X Growth
FY’19-22 Vs FY’17-19
MORE FROM THE CORE

to maximize value share

Portfolio

Portfolio Prioritisation & A&P Effectiveness

Prestige Acceleration

Pricing Power to deliver value

EXPAND BEYOND
to pioneer new terrains of value creation

Data Transformation

Leveraging Data (KDPs)

Route to Consumer

SOCIALS

Organization

Next Gen Marketing

A stronger focus on Experience: Excellence in Execution
Jameson accelerating growth in Sub-Saharan Africa driven by the impact of the right insights and portfolio focus

**Growing market share**

<table>
<thead>
<tr>
<th></th>
<th>CY19</th>
<th>CY20</th>
<th>CY21</th>
</tr>
</thead>
<tbody>
<tr>
<td>SOUTH AFRICA</td>
<td>14%</td>
<td>15%</td>
<td>17%</td>
</tr>
<tr>
<td>NIGERIA</td>
<td>11%</td>
<td>24%</td>
<td>26%</td>
</tr>
</tbody>
</table>

Source: IWSR

Strong growth delivering category and market leadership in Volume and Value
Data driven consumer insight helping to shape the growth of Jameson across SSA to deliver the right experiences

GLOBAL TREND

OPEN DOOR NESTING

FROM Nesting as ‘private’
TO Nesting as ‘convivial’

Jameson Connects Hang-Out Activations
Prestige Acceleration delivering value growth in Nigeria with Martell through the right consumer insights & touchpoints.

Volumes evolution (9lc)

Growing Market Share

<table>
<thead>
<tr>
<th>Year</th>
<th>Market Share</th>
</tr>
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<tbody>
<tr>
<td>2019</td>
<td>10%</td>
</tr>
<tr>
<td>2020</td>
<td>14%</td>
</tr>
<tr>
<td>2021</td>
<td>16%</td>
</tr>
</tbody>
</table>

Source: IWSR

With Martell through the right consumer insights & touchpoints.
Our Prestige Acceleration on Martell in Nigeria

Driven by strong localization of global trends to yield impactful results

GLOBAL TREND

DE-WESTERNISING COOL

FROM Western cool
TO Inclusive local cool

LUX LIFE

FROM Global Luxury Culture
TO Co-creative African Luxe

IMPLICATION FOR PERNOD RICARD

SSA EXAMPLE

Davido x Martell Blue Swift
A 360 campaign co-created feat Nigerian Singer Davido

Porsche X Nigerian creatives
Inclusive dialogue and knowledge sharing amongst black entrepreneurs
Expand Beyond – Direct to Trade

It’s all about disintermediation, to:

- Get closer to our consumer
- Maximise profitability
- Gather real-time data

From Traditional ONLY to INCLUSION of New Channels
While building an omnichannel ecosystem

Creation of 360 RTC
While reducing 3rd party
And enhancing systems

31% conversion rate
E-distributor
70% retention rate
EMEA LATAM Conclusion

**LAST THREE YEARS**

- Growth acceleration
- Enhanced margins

**LOOKING AHEAD**

- Value growth
- Reinforcing competitive advantage
- On the way to the Conviviality Platform