CELEBRATING 20 YEARS OF COMMITMENT TO WATER
At Nestlé Waters great people have built great brands which form the very body of our business.

It is through our brands that the story of our success is illustrated, and it is because of our brands that we are the world’s leading bottled water company.

Our brand portfolio, developed over the past 20 years, presents no less than 64 different bottled waters. Today, this truly diverse family is one of our essential assets, our main competitive advantage, enabling Nestlé Waters to offer quality, great-tasting waters for the enjoyment and well-being of consumers all around the world. Now that is something to celebrate!

Sparkling or still, global or local, festive or family friendly, the common feature of each and every one of our brands is their ability to build and maintain consumer trust and loyalty.

This takes some doing. For all its purity and simplicity, water is anything but ordinary. Our people are constantly increasing their knowledge – not just to better understand and protect the nature of each unique taste, but also to ensure the most responsible management of all our brands. This means promoting the benefits of healthy hydration, improving our environmental performance – including developing ever-more optimised packaging – and building good relations with the communities where we operate.

After all, our brands deserve nothing less.”

John J. Harris
Chairman & Chief Executive Officer
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ONCE UPON A TIME...
Gather round! To mark 20 years of dedicated expertise and commitment to bottled water, this Yearbook tells the tale of how we have created something truly special: an unrivalled collection of brands all around the world; a host of well-loved names which we are proud to present as our unique Nestlé Waters brand portfolio.
This initial foray into the bottled water sector was beaten back by tough economic times and competition from brewers who used their established distribution networks to sell imported bottled waters from Germany. Henri Nestlé withdrew from the sector to concentrate on other ventures. However, strong links with water remained key for Henri - and for the company he went on to found in his own name in 1867 to market the powdered baby food that he had invented in response to infant malnutrition, widespread in Europe at that time.

The first chapter opens on the picturesque north shores of Lake Geneva in Switzerland, back in 1843. Here, a young entrepreneur by the name of Henri Nestlé won a concession to draw water from a local spring and started to bottle and distribute mineral water, carbonated lemonades and sparkling water. Henri Nestlé’s lemonade and water bottling factory was the earliest avatar for what would eventually become the world’s leading bottled water company.

This is the story of a company - our company - which was established with a clear purpose: to focus solely on the distinct and fascinating business of bottled water. Yet, in celebrating the achievements of these past 20 years, let us also look further back in time to trace the events that laid the foundations on which Nestlé Waters has been built.

The mounting case for commitment

Until the late 1960s, the company did not see a specific role for itself in the bottled water sector.

Then, as the swinging sixties came to a close, it was clear that times - and consumer trends - were changing.
In 1969, Nestlé made a significant move, acquiring 30% of France’s third-ranking water company - Société Générale des Eaux Minérales (SGEM) de Vittel. Nestlé had a foot on the podium with giants Perrier and Evian.

Other mergers and acquisitions followed during the 1970s. Springs, brands, bottling plants and delivery companies joined the Nestlé fold in North America, the UK, Germany and Brazil. In response, Nestlé set up a new unit - Aquinvest, the forerunner of today’s company - to coordinate and support its water-related activities, and to continue the search for new springs in other markets, including Saudi Arabia, Iran, Spain and Mexico.

For most of the 1980s, while Nestlé forged ahead with product diversification programmes in other sectors, the water front remained relatively calm - although there was notable expansion of the Vittel brand in France and Blaue Quellen in Germany.

Evidence, however, continued to indicate the real market potential of natural mineral water. In the light of compelling market research, and recognising that water was unlike any other product, Nestlé made a key decision in 1989 during its annual strategic meeting in the Swiss town of Glion: a dedicated business structure was essential if water was to fulfill its undoubted potential. The way was now clear to create a company that would have operational independance.

Preparations began immediately. Having already acquired a majority stake in SGEM Vittel, Nestlé bought the remaining shares in 1990. Ownership of Vittel brought with it a sound technical and analytical expertise on which the future company would continue to build its reputation for quality and innovation.

At the end of the following year, the markets were buzzing with rumours concerning the future of the Perrier Group - an undisputed world leader,
with a well-founded reputation for creativity and marketing panache. The stakes were significant. Perrier’s closest rival was BSN (which would become Danone in 1994), which counted Evian and Badoit among its leading brands. Nestlé analysed the situation and launched a takeover bid, from which the company would eventually emerge victorious in the spring of 1992.

True to the promise made in Glion, Nestlé moved fast to set up a new company, and in December 1992 Nestlé Sources International (NSI) was launched. The world now had a new leader in bottled water.

The launch of a new leader

Here, we turn the page again, and enter the last two decades of our tale. From this moment, our story unfolds in the context of dedicated Nestlé commitment to bottled water – and the pace quickens.

Immediately, NSI set about tackling two clear priorities: taking stock of Perrier’s holdings and subsidiaries so as to focus on strategic activities, and uniting former rivals - Perrier and Vittel - into a cohesive team. European monopoly regulations required NSI to sell some of the brands in the Perrier portfolio, including Volvic, which was ceded to BSN. A new brand was now needed to vie with Volvic in the international marketplace, and the solution was found in the form of a lightly mineralised water from the Ardennes forest in Belgium. Valvert, considered the perfect match for Volvic, made its debut in 1992. Launched simultaneously in five countries - Belgium, France, Germany, Switzerland and Japan - it was the first international bottled water brand to be packaged in PET, the plastic material that was destined to revolutionise the bottled water sector.

There were other launches at this time too, notably that of Quézac in France in 1995, to rival Danone’s top-selling brand of sparkling table water, Badoit.

Further afield, NSI was consolidating the leading position established by the Perrier Group of America (PGA) which had acquired a series of regional brands from coast to coast - including the best-selling Poland Spring - to become a major player in the US bottled water market. With a surge in popularity of small PET formats and the solid support base of the former PGA brands, the outlook in the US market was rosy.

In other parts of the world too, these were heady days for expansion. In 1993, NSI had acquired the Korpi brand in Greece, and entered joint venture agreements with La Vie in Vietnam and Minére in Thailand. Other deals were struck with Naleczowianka in Poland and Santa Maria in Mexico in 1994, followed by NSI investment in a spring near Tianjin in China.
The following year, Penaclara was bought to strengthen local market positions in Spain.

This flurry of activity in just three years had created a solid international base for the company. In response, in 1996, the company changed its name to Perrier Vittel S.A. to throw the spotlight on its two international star brands. The company’s first move under the new banner was to establish a foothold in the Middle East, buying shares in the undisputed Lebanese market leader, Sohat. But there was more to come...

Italy - boasting the world’s highest per capita consumption of bottled water - was a key market. The company already had a firm base there thanks to the Acqua Vera and S. Bernardo brands from Perrier’s portfolio, and a stake in Sanpellegrino, whose star performer was the prestigious international sparkling brand, S.Pellegrino. Negotiations with Sanpellegrino’s majority shareholders led first to an exclusive distribution agreement to distribute S.Pellegrino in France and then to the creation of a joint holding company in 1994, which enabled Sanpellegrino to acquire Levissima, Italy’s top local brand. In 1998, Perrier Vittel S. A. bought all remaining shares of the holding company to become Italy’s leading bottled water producer.

Let us now pause and take stock of how things stood during the latter years of the 1990s. Our young company had changed names from NSI to Perrier Vittel S.A. and had consolidated a leading position in its core business of natural mineral waters. In doing so, the company had focussed on traditional distribution networks in industrialised countries. Glass bottles were still the norm in the classic hotel, restaurant and café channels, while a broad range of bottled water formats were sold via the mass retail channels.

**Carving out new channels**

But the winds of change were blowing. In the United States, another form of distribution had developed which had the potential to take off elsewhere. Home & Office distribution circuits (HOD) had been firmly established by the Perrier Group of America in enclaves corresponding to the regional brands in the company’s portfolio. Water was delivered directly to homes and offices in a range of formats up to five-gallon containers, and Perrier Vittel S.A. now drew on this expertise to launch similar distribution circuits in other markets. First in line was Vietnam with its La Vie brand, followed by China and the UK.

There was another fundamental change afoot at this time. Natural mineral waters - tapped at a single source - were the bedrock of the business,
but a strong case was emerging for marketing other types of waters. Spring water, which was not governed by the same regulations on mineral content, could be tapped at multiple sources; bottled water, which had been treated and filtered, could multiply the opportunities to offer safe, quality drinking water to a much wider consumer base.

And so, in 1997, the company announced two new strategic directions. Firstly, Home & Office distribution would now be integral to the business; secondly, the company would hitherto embrace the concept of multi-sourcing in order to add new lines of spring waters and treated waters to its existing portfolio of mineral waters.

The second development served as an overture for another move of symbolic significance: now that water had proved that it was a key sector within the Nestlé group, it was time to launch a bottled water which would bear the Nestlé name.

**Boldly building brands**

This was a landmark decision. Perrier Vittel S.A. set to work to produce a spring water brand which could be bottled at different sites. The result was *Nestlé Pure Life*, and it made its debut in Pakistan at the very end of 1998. *Nestlé Pure Life* soon appeared in other markets, initially alongside local brands in Brazil, China and Mexico.

The model was a huge hit and in May 2000, Perrier Vittel S.A. launched a second Nestlé brand - *Nestlé Aquarel* - simultaneously in five European markets.

In parallel to the highly successful development of multiple-source brands, Perrier Vittel continued to extend its family of regional brands and partnerships - on all continents - in
successive waves of strategic purchases. In three short years at the dawn of the new millennium, the company made over 30 acquisitions.

This vigorous growth was key in the face of growing global competition. Characteristic of Perrier Vittel’s strategy during this time was taking control of Al Manhal - the leading bottled water brand in Saudi Arabia. Not only did this provide a firm foothold in the Middle East markets, but Al Manhal’s strong HOD base also contributed to the dramatic expansion of this segment.

Commitment to HOD was further reinforced the same year with the acquisition of Dar Natury, the segment leader, in Poland, and other important players in the HOD market: Aqua Cool in the UK, Point d’Eau in France, Universal Aqua and Ava in Pakistan.

In the light of all these developments, it was time to change the company name again; this time to one which would underline its strategic importance within the Nestlé group. In the spring of 2002, in Paris, our new corporate identity was unveiled. We had now become Nestlé Waters - but our spirit and purpose remained the same: to strengthen our capacity and extend our reach in order to deliver quality, great tasting waters to consumers the world over.

Strategic acquisitions and investments in the next few years saw us building our business base on the African continent, including the launch of Nestlé Pure Life in Nigeria in 2005. The spotlight turned to Turkey in 2006 with the purchase of a majority stake in the natural mineral water, Erikli, which became market leader. Swiss brand Henniez came into the fold the following year, and new joint venture agreements were also signed in Mexico and Chile. Meanwhile, the purchase of the Russian player, Clear Water, in 2003 demonstrated our ongoing commitment to this segment.

By 2007, Nestlé Pure Life had become the world’s leading bottled water brand with a staggering five billion litres sold around the globe. More recent acquisitions - such as the Brazilian brand Aguas de Santa Bárbara - continue to consolidate the company’s position in key countries. Other investments - such as the Dar Natury factory in Poland - underline our ongoing commitment to maintain and develop quality, safety and efficiency in all our operations.

Throughout our history, in building our business and our brand portfolio, we have been able to draw on numerous examples of specific “best practices” and experience - in technology and product innovation, environmental protection, resource conservation, process efficiency, waste reduction and recycling. In doing so, we have created a company culture where expertise is not only considered fundamental, but is also constantly developed and shared in our ongoing pursuit of excellence.

And so our story brings us to the present. Today, Nestlé Waters is proud to present a three-tier portfolio of bottled water brands which defines our company’s mission and reflects our strategy. Heading the list are our internationally renowned brands - the sparkling celebrities, S.Pellegrino and Perrier. The core of our business is the body of 59 regional brands around the world. Finally, our three Nestlé brands help to ensure that great tasting, safe, quality bottled water reaches as many people as possible.

We have built a global family of bottled waters that is diverse, distinguished and widely accessible. Through our brands, we are able to bring you - our consumers the world over - the water you need every day - to help you stay hydrated and healthy and - dare we say it - happy ever after.
What does it take to become an international icon of the bottled water world? For both of our premium sparkling brands, the story of success is unique, fascinating and full of surprises.

SPARKLING ON THE WORLD STAGE
In the foothills of the Italian Alps northeast of Milan - that great city of style - there is a truly special spring. The water that rises up and greets the light of day here has spent 30 years seeping slowly through the region’s rocks, until it has absorbed a mix of minerals like no other. This precious gift of nature is further enhanced with a natural carbonate to create the perfect “perlage” of fine bubbles and the unmistakable taste of our sophisticated bottled water *S.Pellegrino*. The brand graces the tables of discerning diners the world over.

As far back as the 13th century, people made pilgrimages from all over northern Italy to reach the San Pellegrino springs, in search of a sense of well-being. Most illustrious of all early visitors is Italy’s ultimate Renaissance man, Leonardo da Vinci. While studying the geology of the area, he visited the springs in 1509, drawing a map of the valley and marking the location of the springs: a fitting record of early appreciation for what was to become a connoisseur’s mineral water.

Celebrated personalities continued to make their way to San Pellegrino, building the spring’s reputation and spreading the word among Europe’s elite. By the end of the 19th century, the San Pellegrino springs had become “the place to be” for the aristocrats and society figures of Europe. Meeting in the summer months for the ritual “taking the waters”, the expectant visitors would flock to the fine hotels, restaurants and fashionable cafes that had been built to welcome them on the banks of the Brembo river. Some would even build their own luxurious homes here, to ensure more exclusive access.

This was the height of the elegant Belle Époque - and a time of unequalled splendour for the site around
the springs. It was also the beginning of S.Pellegrino bottled water. In 1899 the Sanpellegrino water bottling company was founded, with the intention - at first - to meet the demand of those who had spent the summer at the springs. But in bottled form, the water became more widely accessible and started to win the hearts of a more cosmopolitan clientele. Before long, S.Pellegrino was being sipped far beyond the seclusion of the spring: by 1920, two million bottles were being exported annually to Argentina alone!

S.Pellegrino has been front and centre on the international stage ever since, and as the water's reputation has grown, so too has production risen, market share increased and stardom spread. In fact, in the refined international gourmet food sector, S.Pellegrino has become a constant member of that exclusive circle reserved for the most celebrated of Italian products. Why? Well - it's all a question of impeccable taste: the mineral structure bequeathed by nature is rich, structured and balanced; combine this with the brand's characteristically fine bubbles and you have a water which brings out the very best in food and wine. An essential companion to culinary excellence.

The bottle, too, has become emblematic of style and elegance. As fashion has evolved over time, the S.Pellegrino bottle has followed suit, while always retaining the key features of its identity on its water-coloured labelling: brand awareness, Italian origin, nature's masterful mix of minerals, and that hallmark of quality - the red star.

Sanpellegrino's production process keeps the focus firmly on quality, and the bottling factory - located near the springs, in San Pellegrino Terme - is a state of the art facility. Here, everything from the choice of raw materials, to the bottling process and storage conditions, contributes to maintaining the undisputed reputation of the water.

Today, the brand has achieved the number one position for bottled water in the world of fine dining: a total of 650 million bottles are distributed each year in 120 countries, 80% of them in the hotel, catering and restaurant sector.

With characteristic elegance and in the spirit of conviviality, S.Pellegrino is a tireless advocate of excellence - both through its own dedicated efforts, and by teaming up with selected partners to promote innovation, quality and style. Not surprisingly, the main focus of collaboration is the gourmet food and wine culture, and associated research.

In sponsoring the annual World’s 50 Best Restaurants Awards, organised by the British Restaurant Magazine, the brand lends its name to this prized platform for food lovers around the globe. The extensive media coverage of the awards - dubbed the "Oscars" of world dining - is a boost for the brand's visibility, and helps to increase brand presence in the world's leading restaurants.

The voting panel comprises no less than 800 international chefs, critics, restaurateurs, food writers, journalists, food experts and globe-trotting gourmands. Collectively, they elect the most exciting and consistent restaurants and their chefs - and the results are eagerly awaited by food lovers and professionals alike. There was great excitement in 2010 when a Copenhagen waterfront Nordic restaurant - Noma - won the World’s Best Restaurant award, nudging four-time winner - El Bulli in Barcelona - into second place.

Sparkling on screen

Instantly recognisable, the S.Pellegrino bottle is a potent icon in the world of cinema; the water that famous directors want on their sets to evoke class and sophistication. Following its appearance in Fellini’s celebrated 1960s masterpiece, La Dolce Vita, the brand became the choice of other directors over the years, featuring in Hollywood movies, such as The Goddess of Love, Sabrina and The Devil Wears Prada.

As a natural member of a star-studded cast, Sanpellegrino signed on in 2010 to sponsor the Cannes International Film Festival, joining the screen stars to add extra sparkle. Already a partner of the Venice Film Festival, this latest partnership is a logical step for a brand which has appeared in a string of film classics stretching back over half a century.

Fine food enthusiasts have encountered S.Pellegrino - and her still water sister brand, Acqua Panna -
at other internationally renowned events as well, where they continue to bring people together around premium food products and spectacular culinary performances. In S.Pellegrino’s home city of Milan, the brands hosted top chef Massimo Bottura (owner of Modena’s famed Osteria Francescana) during Le Grand Fooding event; in the city’s biggest public park, the brands were the official waters of the Taste of Milano festival.

Since live encounters are not always possible for everyone, S.Pellegrino is also active in the virtual world, thanks to a new global digital platform: proof, if it were needed, that the brand is as up-to-date as it is elegant. With a website dedicated to the brand, another specifically created for international food lovers, an S.Pellegrino Facebook fan page, Twitter profile and a dedicated You Tube channel, the buzz around the brand is certainly bubbling.

Let’s take a look at some of the most recent initiatives and achievements.

**Engaging images**

S.Pellegrino is Italian, so what could be more natural than an international advertising campaign that focuses on this happy inheritance? The very essence of the brand encapsulates Italian values that are recognised and appreciated in all corners of the world: conviviality, quality, style and authenticity.

To illustrate the brand’s natural place in the art of living - Italian style - S.Pellegrino turned to the eminent photographer Elliott Erwitt, a former member of the renowned Magnum agency. This man of many languages, few words and subtle humour has a rare talent for telling stories spontaneously through pictures - and that is exactly the focus of this campaign.

In black and white - his preferred medium - Erwitt shot a series of photographs from which seven images were selected. Each captures the warmth, refinement and elegance of S.Pellegrino, in unexpected and engaging situations that are all intrinsically Italian.
Collectively, they convey a sense of spontaneity and storytelling.

This latest campaign - which has been rolled out worldwide - builds on the success of the first “Live in Italian” series, reinforcing the brand’s enduring qualities, while lending a modern twist to the pleasures of drinking such a special sparkling water.

**Talented partners**

The success of Erwitt’s beautiful images is proof that when complementary talents pursue a shared goal, they can bring out the very best in each other. *S.Pellegrino* is no stranger to this phenomenon. Since its very beginnings, the brand’s subtle flavour and fine bubbles have complemented the taste of fine food and wines. More recently, the brand has embraced a wider range of top talent - stretching beyond the gourmet food sector - in an exciting project to create synergies between the most celebrated Italian premium products and names.

“*S.Pellegrino meets Italian Talent*” is an unprecedented collaboration with select Italian superstars; names which uphold the same values and are renowned for their innovation, quality, design, service and prestige. Sanpellegrino chose leading Italian fashion house, Missoni, as a natural partner to inaugurate the project in 2010 - and the result was a supremely tasteful Special Edition Bottle for *S.Pellegrino*.

Fully respecting the iconic value of the water brand’s label, Missoni designed a beautiful bottle - in four nuanced versions - destined for the best restaurants all over the world. Focusing on the celebrated *S.Pellegrino* water colours and incorporating the stylist’s famous zigzag design, the results are masterpieces of tableware.

Before distributing 30 million units to leading restaurants all over the world, the new *S.Pellegrino* bottles were presented in Milan, at the launch of the Missoni Man Spring/Summer Collection 2011. For the event, a spectacular handmade promotional bottle was crafted in limited edition, sporting an original Missoni textile patchwork, complete with the *S.Pellegrino* red star.

The true star quality of *S.Pellegrino* shone through again in December 2010 when the brand donned glamorous new garments - this time to celebrate the 125th birthday of the Italian jeweller, Bulgari, which
S.Pellegrino held a retrospective exhibition - first in Rome, and then in Paris - to mark the occasion. Against the glorious backdrop of the Grand Palais, S.Pellegrino paid tribute to Bulgari’s lasting contribution to Italian excellence, which has become treasured the world over.

Dressed for the occasion, S.Pellegrino appeared in a dedicated bottle with a special label. Magnificently wrapped in gold and jewels, the brand was served to the 5,000 celebrities and guests attending the opening; fitting refreshment to accompany the display of more than 600 treasures. Throughout the run of the exhibition, the promotional bottle was also on the table in 20 top hotels and restaurants in the city - and not wanting to miss out, the fashionable Parisian store, Colette, chose to stock it as well.

Paris was not the end of the story; indeed it marked the start of a partnership in 2011 which resulted in the production of a new bottle, even more splendid than the last - one which featured a luminous gold label on which some of the most outstanding Bulgari jewels were represented. The bottle was launched by Nestlé Waters France at a prestigious gathering at the Paris Ritz, attended by a host of French stage and screen stars. The reason for this glittering new edition? The Bulgari retrospective exhibition was heading east - to China - and S.Pellegrino was to grace the most refined tables in the country in festive attire while the jewels were there on tour.

**Ambassador of refinement**

Teaming up with talent is the latest initiative in Sanpellegrino’s ongoing commitment to promote Italian excellence on the world stage, and it has not gone unnoticed. Last year, Sanpellegrino was the proud winner of a prestigious national prize - the Andrea Pininfarina Award of Excellence - for all that it has done to contribute to the country’s image and values outside its own borders.

The award is given annually by the Italian employers’ federation, Confindustria - which represents almost 149,000 companies of all sizes and around 5.5 million employees nationwide. It is named after the late CEO of the Pininfarina firm - which designed Ferrari cars - and was presented by Confindustria’s president, Emma Marcegaglia, during an event in Turin last October (2011). Under the banner “Make it in Italy”, this focal event brings together leading figures from key Italian companies and institutions.

In accepting the award, Sanpellegrino’s president and CEO declared that for more than a century Sanpellegrino had been an ambassador of refined Italian taste and style. Dedicating this prestigious award to the employees’ commitment and passion, he added, “Year after year, they have been able to translate the excellence and quality of S.Pellegrino mineral water into a lifestyle that perfectly combines taste and pleasure, with great success in five continents.”

And so, as we have seen, the story of S.Pellegrino inspires and delights the most refined admirers. Translated into many tongues, the tale is told time and again at fine tables and in sparkling company all around the world. Indeed, there is no end in sight.
Close your eyes and think of Perrier. The multiple images that flood to mind evoke joie-de-vivre, sensuous glamour, fun, a touch of madness! The tale in which Perrier is the main protagonist is one of Ultimate Refreshment for intense pleasure. Something in those strong, bold bubbles frees up the imagination, tosses off inhibition, and throws care to the wind. But where did it all start?

The answer lies in the sun-drenched lands of southern France, where water and natural gas meet in a heady mix that has bubbled up in a sparkling spring at Vergèze since ancient times.

Legend has it that Hannibal paused here for his parched army to drink on their way from Carthage to Rome in 218 BC. Julius Caesar distributed lands in the region to loyal soldiers, and the Romans appreciated the spring in an area where water was scarce.

In the ensuing centuries little is recorded, so we must fast-forward to 1769 when the site was bought by Claude-Vincent Granier. However, it was his grandson who had the business acumen to exploit the spring, and his efforts bore fruit in 1863 with authorisation from Emperor Napoleon III to call it mineral water.

The next key character in the story is Dr Louis Perrier - a specialist in spa waters - who acquired the lease to the spring in 1894 and bought it four years later. He created the Société des eaux minérales, boissons et produits hygiéniques de Vergèze and devoted the rest of his life to studying the water's properties while trying to perfect the bottling process. In 1903, Dr Perrier
found the perfect partner to help him expand the business - an English gentleman by the name of John Harmsworth.

Intelligent, sporting and well-connected, Harmsworth quickly made his mark. In 1906, he took the helm, honouring his predecessor by renaming the company - the Compagnie de la Source Perrier - and calling the water *Perrier*.

Positioning *Perrier* as a top-of-the-range water, Harmsworth sought markets in the colonies of the British Empire - starting with India - where *Perrier* rapidly won over the British officers and troops. Safe and pure, *Perrier* made the perfect mix with whiskey, and appealed to a clientele desirous of that little touch of French sparkle.

Having conquered the colonies, *Perrier* came to London to seduce Buckingham Palace. By now dubbed the “champagne of table waters”, in 1905, *Perrier* was granted the royal seal of approval: “by Appointment to His Majesty the King of England”.

Harmsworth injected a sense of humour into the brand. The unmistakable bottle shape was chosen to resemble Indian clubs, which Harmsworth used to exercise and recover from a car accident. The water, the bottle and the humour became inseparable: other mineral waters were extolling therapeutic virtues; *Perrier* represented elegance and fun - “la fête!”.

For Harmsworth, this was the very spirit of France itself. He summed up the philosophy that was shaping *Perrier*’s character: “Every man has two countries; his own and France”! Backed by this mix of personal enthusiasm and commercial strategy, *Perrier* was set to be bilingual, and the brand’s inimitable style of communication was born. In the 1930s, to woo the French, the play on words turned more democratic and - well - a little risqué! With slogans such as “Ne vous endormez pas sans elle.” (“Don’t sleep without her.”), *Perrier* publicity was already turning heads.

In 1933, the *Perrier* Spring was given the official label “Déclarée d’Intérêt Public”. Harmsworth died that same year, but he had started something that would last.

During the war, the spring was requisitioned by the Germans and it was not until 1947 that commercial production began again when the site was bought by Gustave Leven. It was the start of a new era. Leven modernised the bottling factory, boosting annual production from 30 million to 150 million bottles by 1952, with France now consuming the lion’s share.

Other brands were acquired and a new advertising strategy was put in place, taking off with the launch of the Pschitt campaign, developed by Jean Davray. He burst onto the scene in 1949 with “*Perrier*, l’eau qui fait Pschitt”, and until his death in 1985, Davray continued to build the *Perrier* phenomenon with his infallible instinct and ability to anticipate and interpret trends - as well as his devilish daring. As Davray declared: “*Perrier* - c’est fou!”, and it always will be.

Ever since its earliest days, *Perrier* has felt at home all over the world. In 1976 the company opened an office in New York, and within a decade 300 million bottles were being sold annually in the US, representing 80% of imported bottled water at that time.

Tough times, however, were approaching. In 1989 traces of benzene were found in a handful of bottles in the US. Though there was no danger to human health, it was a serious setback. *Perrier*’s response to the crisis was nonetheless impeccable, and following the affair a new future was forged. Nestlé saw the opportunity to bring *Perrier* into the fold, and the ensuing deal was finalised in 1992. True to its spirit, *Perrier* proved that it could take a knock and bounce back.

Today, *Perrier* is an undisputed world iconic brand. 900 million bottles of *Perrier* are produced yearly, in all formats and types; half of these are destined for export to all corners of the globe. *Perrier* continues
to provoke, to entice and to bring sparkle to life. Constantly embracing new ideas and challenging conventions, Perrier continues to write its fascinating story. Let’s now turn to some of the latest chapters.

Mixing magic

Perrier and the art of making cocktails are synonymous. After all, mixology combines creativity and science. It takes knowledge, skill and experience to mix liquids, solids and and gases; to combine flavours to produce a drink that will seduce and satisfy the senses. Perrier has been a key ingredient in this artful alchemy for over a century.

Today, what self-respecting barman would begin to shake without Perrier at hand? With its low mineral content and bubbles bursting with life, Perrier makes the perfect mix for the perfect cocktail. True to form, Perrier is no passive partner in modern mixology. Teaming up with Liquid Chef Paris - a company whose mission is to create fashionable cocktails -, Perrier has helped to develop a complete training kit to inspire cocktail makers and establish Perrier as the “must have” ingredient in the world’s top cocktail bars.

Among the tools developed is the Mixology by Perrier guide, which offers a range of recipes from classic to contemporary creations. Master classes are also available to hone the talents of top bartenders, and a series of videos have been produced targeting consumers and professionals.

Word is being spread on the Web and via face-to-face encounters. Mixology demonstrations have been a key attraction at numerous events, including the Montreux Jazz Festival in Switzerland; a Master class in Moscow for top bartenders; and Lebanon’s trade fair for Food and Beverage professionals.

To make cool cocktails more widely available, Perrier Mixology bars were set up in superstores, like Carrefour and others, all over France in 2011. And anyone with a passion for cocktails can find several of the latest Mixology by Perrier recipes on You Tube or on www.perrier.com. Prepare to be knocked off your bar stool by “Beet” - an amazing raspberry-beetroot-coriander mix, or “Magic”, which tastes of candy floss.

Melting hearts

Perrier’s talent for pushing the boundaries of marketing creativity remains as fresh and strong as its sparkling bubbles. The latest chapter in the legendary advertising story began in 2009 with the “Melting” TV commercials, supported by billboard visuals.

In three different settings, the world is seen succumbing to extreme heat, where everything begins to melt and human thirst seems unquenchable. Faced with this uncontrollable desire, Perrier is the only solution!
The campaign - which picked up a Lion d’Argent at the International Advertising Festival in Cannes - was developed by Ogilvy and Mather Paris - the advertising agents behind Perrier’s acclaimed “The Lioness” and “McEnroe” adverts of the early 90s and the “T-shirt” billboard campaign of the early 2000s.

In the key North American market, “Melting” became one of the drivers in a new business approach called Supercharge - a three year plan aimed at injecting new energy into the sales performance of leading international brands.

In 2012, a new film and digital experience are being rolled out, pushing “Melting” to new limits - in true Perrier style. The message? Just one drop of Perrier takes the heat out of the sun: the ultimate source of refreshment against the ultimate source of heat. While the film boosts Perrier’s iconic personality, the digital experience will reinforce the social side of the brand’s character and reach out to younger consumers.

Dita the Diva

Perrier also derives energy for its advertising campaigns from the exceptional artists and personalities it has chosen to work with over the years. Who better to represent the glamour and sparkle of the Perrier bubbles today than the burlesque American beauty, Dita von Teese, whose fabulous face and body grace limited editions of bottles and cans.

A supremo on stage, Dita has revived the retro art of strip tease, and is renowned for her style, sophistication and daring as a performer. She made her first live appearance as the brand’s new icon at the Roland Garros tennis tournament in June 2010, where guests savoured the new Perrier Karma cocktail created for her, and for the launch of a new two-phase advertising campaign.

The summer phase featured Dita in a limited edition called Paparazzi, followed in the autumn by a new collection called Tattoo. There was action on the digital front too, with a new Perrier interactive website dedicated to Dita [www.perrierbydita.com] with links to social networks.

Online is proving the place to be

A natural trend-setter, Perrier has been exploring the very latest promotional opportunities. Indeed, the brand is one of the most active pioneers in the Nestlé Waters portfolio in taking strides into the digital age.

Dedicated brand websites are becoming the norm, and Perrier, of course, was in the vanguard of that trend (www.perrier.com). Nonetheless, the scope to move further into digital communications - via blogs, social networks and content communities (such as You Tube) - is huge. Not only are these forms of digital communication rapidly transforming our private lives, they are also making waves in the corporate world.
True to form, Perrier is riding the crest of the wave. The brand has been making its mark on Facebook - the world’s most extensive social network - by sharing information, recipes for Perrier cocktails and vintage Perrier advertisements. This is also the place where fans can go to keep up with the whereabouts of celebrity icon, Dita von Teese.

But that’s not all. In the summer of 2011 - in pure, provocative Perrier style - a worldwide digital experience was launched which pushed back the boundaries of social media innovation. Le Club Perrier was a fully interactive video - a virtual party (n’eau less!) - launched on You Tube. The more views the video got, the hotter the party became. It was steamy stuff!

Le Club Perrier was the first campaign ever launched by Perrier simultaneously all over the world. Viewers were drawn to the You Tube videos via short TV trailers launched in Perrier’s leading markets - the US, Canada and France.

Le Club Perrier proved it was “the” place to be, extending the brand’s appeal to younger consumers and consolidating Perrier’s image as innovative, cool, trendy and unique. The buzz spread like wildfire: Perrier’s Facebook page encouraged viewers to share the videos (six in total), to show the nightclub growing every more crowded and crazy as the number of viewers rocketed; masthead advertising on the You Tube homepage increased visibility to millions of You Tube fans; Le Club Perrier also played an interactive ad on iPhone, reaching millions of mobile phone users.

When the party was finally over, 11 million viewers had watched the video and it had dramatically increased the number of fans of Perrier’s Facebook page. A triumph of teamwork between Perrier’s three biggest markets, Le Club Perrier had made an important step in creating new brand business models where internet communities have a key part to play.

Perrier and Roland Garros - a magical match

With traditional media channels reaching saturation point, Perrier’s ongoing partnership with the Roland Garros French Open tennis tournament is a genuine asset. Every summer, this Grand Slam event in Paris hits the spotlight on the world’s sporting stage, and for the past 35 years, Perrier has sponsored this glorious fortnight where talent and chic meet in style.

Roland Garros has become part of the brand’s very essence, providing exceptional media visibility. With 450,000 spectators, coverage by 100 television networks, 6,000 hours of programming and a further three billion potential viewers in 180 countries, this is a match made in heaven.

The Perrier brand is present in all the on-court player rest areas, throughout the stadium, and even on the shuttles carrying visitors to and from nearby metro stations. The tournament also provides opportunities for new packaging and sales promotions, a privileged place to invite VIP guests, and the impetus to push volumes in wider French marketplace campaigns.

From such a solid base, Perrier has created opportunities for other Nestlé brands to make their mark at the event. When the sponsorship contract was renewed in 2010, other Nestlé Group brands were able to benefit from Perrier’s privileged position and long-standing relationship.

At the same time, Perrier lent its name as official partner of the Legends Trophy - an increasingly popular event at the Grand Slam tournament since its launch in 1998. Cheered on by 20,000 spectators, former champions and top players focus on the game - not the match - drawing on emotion, creativity, talent and fun! Perrier values – each and every one. Say n’eau more!
Now let’s consider the depth and diversity of our local brands: more than 55 natural, great-tasting waters that are proud of their origins and committed to quality and sustainability. Spanning five continents, each represents the spirit of a special place, and each has earned the loyalty of consumers who care.
It’s time to shift the focus of our story, and look now at the impressive array of local brands which make up the main body of the Nestlé Waters portfolio. The richness of this tier lies in its diversity: 59 brands in total. Individually, each brand is a much-loved and respected character in its region or country; collectively, they constitute the vast majority of our brands, present on five continents. Generating pride and loyalty among consumers, the reputations of these local brands stretch far beyond the immediate locality of the source where they originate, without ever losing their strong sense of identity. Often they have become national favourites.

There are many features which our local brands share. The first common trait is the simple fact that they are all totally natural. Secondly, whether they are natural mineral waters or natural spring waters, all our local brands have strong links with a particular locality or region. Thirdly, they have all been selected, over time, to join the Nestlé Waters fold because of their great taste, their quality and their sustainability. Finally, all are valued partners in Nestlé Waters’ strategy to be the world’s leading healthy hydration company; offering safe, good tasting, reliable bottled water to consumers the world over.
As in any close-knit family, however, individual personalities express themselves against a backdrop of shared resemblances. Each and every local brand is a distinct character. The unique taste of each reflects a different mineral composition, a particular landscape and a distinct journey. Their respective life-stories and experiences provide each brand with different platforms and opportunities for innovation, initiatives and involvement with local stakeholders.

To continue with our tale, we have selected a number of local brands from our portfolio to help illustrate the breadth and depth in this central tier of formidable assets. By way of introduction, here are thumbnail sketches of our selected cast.

**Vittel** is a natural extrovert, hailing from eastern France, and full of vitality, which makes it the perfect partner in sport. Also innovative and caring, the brand invests its energy and experience to improve environmental performance, protect water resources and combat climate change.

Proudly feminine, **Contrex** is fully aware of her ability to help ladies when it comes to losing weight and feeling great. Not content to limit her shapely appeal, Contrex enjoys being appreciated far beyond the boundaries of her native France: a local brand with a lot of attitude.

**Henniez** is the darling of the Swiss people; a brand evocative of peace and calm. With a heritage that dates back to Roman times and beyond, today Henniez champions sustainable development, playing an active and innovative role in water resource management and protecting biodiversity in the countryside surrounding the source.

Extending its lead in the Turkish market, **Erikli** is hailed on home ground as a premium brand. With a great taste and mythical mountain origins, Erikli has been setting new standards in communication, boosting brand loyalty and optimising its unique distribution network.

It’s the power of its purity which gives **Levissima** such a special place in the hearts of Italian consumers. The brand is actively engaged in protecting the alpine glacier that is its birthplace, and in leading the way towards optimised environmental packaging performance and higher levels of recycling.

The awesome power of nature provides the purest of locations in the peaks of the Andean Cordillera, and the start of a journey which leads to the brand, **Eco de los Andes**. Strong in its values and in vitality, the brand is an active partner in protecting the pristine nature of its aquifer. It has succeeded against the odds during tough economic times - making dramatic gains in market share.

From the sunny climes of southwest China, the smooth sweetness of **Dashan** is celebrated as a natural treasure in its home province of Yunnan. This reflects the strong local interest in natural heritage - every bit as important and valued as Yunnan’s rich cultural heritage. A brand with deep local knowledge and a key partner in one of the world’s most exciting markets.

In the United States, six regional spring water brands ensure that consumers - from east to west - can enjoy bottled water that is 100% Regional and 100% Natural. Innovative, health-conscious and environmentally aware, the US regional brands are a formidable team in encouraging sustainable healthy hydration.

If these fleeting presentations have whet your appetite for more information, turn the page and read on as the story continues to unfold.
Epic vitality

A spearhead in the Nestlé Waters portfolio, Vittel captures the very best qualities of the water from the thermal springs of eastern France. Its reputation is built on vitality and a penchant for sport, but Vittel is also a model of active responsibility when it comes to source protection, water resource management, developing projects aimed at creating shared value, and pioneering optimised packaging. All in all, a truly multi-faceted brand.

Over time, Vittel has created a series of advertising films which mark the history of the brand, and sometimes the history of advertising itself. “There must be something in the water” is the latest campaign slogan. The elusive “something” in Vittel is a source of vitality for those who drink it. The message is developed in a series of film vignettes featuring the Vittellois, the real people of Vittel. Sporty, inventive and witty, they are the very embodiment of vitality - and always loyal to the local countryside that gives rise to Vittel.

Making it simpler to be healthier

On the question of health, Vittel makes the most of its natural credentials. Take hydration, for example. The average adult needs 1.5 litres of water every day*, and Vittel hydrates while recharging our bodies in essential minerals.

One of Vittel’s trump cards is that it is a natural source of calcium - a vital mineral for the healthy growth and development of bones. This is particularly important in children, which is why, from the age of three, children too benefit from drinking Vittel. Indeed, at every phase of life, calcium and other mineral salts are essential for a healthy body. Drinking Vittel as part of a varied and balanced diet helps keep our bones strong and healthy.

Available in six different PET formats (from 0.33 l to 2 l) and three glass-bottle formats, the brand is readily on hand to suit a wide variety of daily routines and lifestyles. During family meal times, when out and about, in the office or during exercise - Vittel keeps consumers company all day long.

A source of pride

Naturally, the quality of its water is vital for Vittel. That is why, for the past 20 years, the brand has been actively engaged in a project to protect its source in the Vosges. It all started officially in 1992 with the creation of AGRIVAIR, a Nestlé Waters France subsidiary working in collaboration with the French National Institute for Agronomic Research (INRA). Ever since, the project has continued to develop thanks to the active participation of local stakeholders: farmers, businesses, local authorities and residents have all played a part in adopting environmentally friendly practices.

* For a healthy sedentary adult living in a temperate climate
Today, 5,000 hectares of land around the source are covered by the scheme. A “zero pesticide” policy has been established, with farmers successfully adopting alternative methods. Crop rotation, the use of compost fertiliser and thermal weed control are now common practice; alfalfa is planted instead of maize, and biomethanation units to come will convert agricultural waste into biogas fuel.

All this has contributed to local sustainable development, and created shared value for those involved. Besides, exceptional levels of biodiversity are now found around the source, including rare species, which have returned to the area. It is a further source of pride that this initiative was officially recognised when Vittel and AGRIVAIR received special commendation in 2010 from the French Ministry for Sustainable Development and the French National Environment and Energy Agency (ADEME) for “Best site management initiative in biodiversity”.

Better bottles

Vittel took a further step along the path to sustainable development in 2011, with the launch of a 30% plant-based plastic bottle. Produced for the brand’s smaller formats (0.33 l, 0.5 l and 1 l) for out-of-home and retail channels, the new bottle made its debut appearance in October in the French restaurant chain, Flunch, before being rolled out on the mass market between January and early March 2012 in France and Belgium.
The plant-based PET is made from sugarcane residue by-products. It has the same protective qualities as PET, and is fully compatible with current sorting and collection systems. A key advantage is that it reduces the use of petroleum-based material. What’s more, it doesn’t compete with food crops intended for local populations, nor does it lead to deforestation.

**Sorting out problems**

That said, there is more to be done, which is why Vittel is proactive on several fronts, including waste sorting. The brand has joined forces as one of the main partners of Canibal, a young French company which has developed a fun-to-use, innovative machine for recycling drink containers consumed out of home. In France, only one of every two plastic bottles is currently recycled, and there is no organised system for collecting bottles of water consumed out of home. The gap is now partially filled with a machine that collects, sorts and compacts cans, small-format plastic bottles (up to 0.5 l) and disposable cups in companies and public areas.

**To the Amazon and beyond**

Vittel’s commitment to sustainable development stretches far beyond the brand’s home turf; as far as the Amazon. The world’s greatest reserve of fresh water, and home to the greatest diversity of plant and animal species, is the focus of a new initiative designed to protect it.

In the region’s tropical climate, trees grow fast, absorbing more CO₂ than they emit, and contributing to cloud formation, which helps to cool the planet. Protecting the Amazon also means reducing greenhouse gases, maintaining the water cycle and protecting biodiversity. These important challenges were behind Vittel’s decision in 2010 to back Pur Project and local cocoa farmers in South America in their collective program to combat
deforestation and climate change. Pur Project planted no fewer than 350,000 trees in Bolivia and Peru during the first year, and the target is to have planted one million trees by the end of 2012. It’s a tall order, but with characteristic vitality, Vittel is helping to make a difference where it matters.

Water to take on tour

When it comes to sport, Vittel is a highly visible partner of leading international events, such as the Paris Marathon and the world’s third biggest sporting event - the Tour de France cycling race.

Ever since the end of the 1960s, the Vittel publicity caravan has been handing out mineral water to spectators on the nationwide Tour de France circuit, and in 2008, the brand became an official partner of the race. Vittel publicity is particularly present for the last 25 kilometres of each stage; a good place to be as they always attract the greatest number of spectators. Every year during the Tour, the Vittel caravan creates a buzz and a loyal following with its own parallel team of cyclists - Team Vittel. Thanks to their efforts, one million bottles were handed out to keep the public cool during the 2011 event.

Also an official partner of the Paris Marathon, since 2010, Vittel offers much-needed hydration for the runners as they pound the streets of the French capital. During the 2012 event, more than 450,000 bottles of Vittel were supplied at nine staging points throughout the race. After each staging point, 250 sorting bins lined the route to ensure the recuperation of the 100% recyclable PET bottles and give them a second life. And just in case the competitors’ minds were focused elsewhere, Vittel made sure that volunteers were present during the race to help the runners to adopt a waste sorting reflex - even while they were running. With such active support, Vittel is making sure that recycling has more than a sporting chance of success.
A long time ago in Contrexéville

In the beginning, only a lucky few knew the secret: in the charming small town of Contrexéville, in the heart of France’s Vosges Mountains, stood a “mineral fountain” whose water was said to give rise to miracles. Stumbling upon the spring by chance, a young noblewoman of the region had been mysteriously cured of kidney stones. Intrigued by the story, the Duke of Lorraine’s personal physician - a Dr Charles Bagard - came to collect samples for further study. In 1760, Dr Bagard presented his “Report on the Mineral Waters of Contrexéville” to the Royal Society of Arts and Sciences. To an awestruck audience of fellow specialists, he revealed the remarkable properties of this water, and recommended it in the treatment of various conditions, such as kidney stones, gout and certain skin conditions. Thirteen years later, Contrexéville opened its first hydrotherapy building. The region’s well-to-do came flocking, soon to be followed by gentry from all over France, and even curious visitors from the across the Channel. By 1780, 2,000 litres of the sought-after still water were being bottled in Contrexéville, to send to all corners of the country.

Eventually, the water was officially certified as a “natural mineral water” by ministerial decree, and at the same time, Contrexéville was swept up in the wave of industrialisation. Undoubtedly, it was the fashion for spa resorts which put Contrexéville on the map, but it was
the arrival of the railway in 1881 which led to unprecedented boom years for the town. The Belle Epoque saw the greatest influx, with a succession of blue-blooded visitors that included Queen Isabella of Spain, the Shah of Persia and the exiled King of Serbia. The nearby Gironcourt glassworks ensured a steady supply of bottles, and production soared from 20,000 bottles in 1857 to two million in 1914. In the same year, the Academy of Medicine and the Ministry of Health endorsed the water’s benefits in the treatment of various conditions.

Then, in 1954, the mineral water developed a truly national dimension. Acquired by Perrier, it moved from its well-established place on pharmacy shelves into the aisles of mainstream supermarkets. In the light of such ongoing success, it was time to give the water of Contrexéville its own name, and in 1976 Contrex finally had all that was needed to stand alongside the big name brands. And yet, far from being just another brand, Contrex stood out from the rest: quite simply, its balance of minerals was like no other on the market.

A shapely silhouette

An incomparable richness in mineral salts and inherent qualities which encourage elimination are the basis of Contrex’s claims as a slimming partner. Indeed, this is the very essence of the brand. Health-conscious women want to be slim, and there is no better drinking partner than Contrex when it comes to getting in shape. Of course, there is no miracle solution for losing weight, but it certainly helps to eat a balanced and varied diet, drink water and take exercise. This is just what Contrex has been saying to women for the past 50 years. Indeed, it is specifically in addressing women that Contrex has carved out its unique position in the market. Today, nine out of 10 women say that Contrex is more effective in elimination than other waters. What’s more, a recent survey found that 94% of those who came to the Contrexéville spa lost significant amounts of weight - without reducing their body’s important mineral content. Not surprising, perhaps, when you consider that drinking 1.5 l of Contrex on a daily basis provides 58% of the recommended daily intake of calcium, and 19% of magnesium.

Over the years, Contrex has remained consistent in its key message. The first advertising campaign to focus on this theme dates back to 1954: “One waist, two hips, three reasons to drink Contrex”. In 1968, the brand was no less direct with a clever play on words in the French slogan: “Mince!... elle boit Contrex”. Like the women who drank it, Contrex also lost weight when the brand became fully committed to PET bottles. There followed the first TV advert, encouraging women to think about their figure: “With a little exercise, a little determination and Contrex, you will be more beautiful with a few pounds less.” This was the prelude to the “slimming partner” campaign which appeared at the end of the 1980s. In line with the times, these slogans were less directive and more complicit: “I feel more beautiful when I feel slim. And so, to feel good, I eat healthily, and have made a pact with Contrex. I have signed up to slim down with Contrex,” confided a certain model named Carla Bruni.
An iconic product deserves a “look” befitting of its status, just as a rare pearl deserves a worthy setting. Contrex needed an image to match its growing reputation. And so, in 1997, the bottle was re-sculpted to evoke subtle female curves; a new shape that was to become the hallmark of the brand, part of a world where femininity and elegance reign. A final seductive touch was added in 2005, when the bottle blushed a subtly darker shade of pink.

My Contrexperience

Contrex is a national treasure, a trusted slimming companion, a brand that reads the needs of women through changing times. So, what is it that today’s women seek? A healthy dose of joie-de-vivre liberally sprinkled with positive thinking. Yes, women still like to be slim; they want to feel - and look - good, but not at any price. The challenge is to shape up with a sense of humour and perspective for a more sustained svelteness. The good news is: it’s possible - and this is the key message in the brand’s latest campaign, “My Contrexperience”. The campaign film shows a line of pink exercise bikes lined up outside an opera house. As curious women step up and start to pedal, music is triggered and a huge neon male strip-tease artist appears, and starts peeling off his clothes - just for them! While they squeal with delight, the calories simply slip away. It’s dramatic, it’s fun and it’s all about shared effort.

The masterstroke of “My Contrexperience” is in giving a contemporary “feel good” twist to the brand, with an emotional dimension, while staying true to Contrex values. The results speak volumes: in October 2011, with the campaign barely launched, the video became the most-watched worldwide. Six months later, it had reached 25 million viewings.

As for the campaign’s Facebook page, with its slimming challenges, humorous “don’t crack!” warnings and encouraging advice, it has close to 100,000 fans. Contrex sales have risen in line with the campaign’s popularity, with market share up by 0.3 points over the past three months compared with the annual trend.

While around 70% of today’s Contrex consumers are over 50 years old, 80% of them started drinking the brand well before they reached this age. “My Contrexperience” aims not just to keep loyal consumers, but also to win over younger women to build enduring success.

During more than 250 years of history, Contrex has forged a special bond with women. And today, with “My Contrexperience” it is reaffirming its claim, more than ever, as the natural mineral water of choice for women. Beautiful, healthy and happy - that’s the way Contrex wants women to feel.
Superlatives abound when people talk about Levissima - Italy’s favourite local bottled water. The original positioning for the brand evoked the pristine Piazz-Dosde glacier which gives rise to the Levissima spring in the alpine village of Cepina: “Altissima, Purissima, Levissima” - Highest, Purest, Lightest. It has been seen this way ever since.

The latest campaign slogan - the Power of Purity - reinforces the essence of the brand. For Italian consumers, Levissima is the ideal mineral water - low in mineral salts, light in taste and pure in origin. Capturing the full splendour of untouched mountain peaks, the campaign focuses on the regenerating and purifying powers of nature. Levissima embodies this primal force.

With the glacier as the iconic symbol of the brand, it is not surprising that Levissima takes its responsibility for protecting the environment so seriously. In Italy, consumers want to be able to enjoy their favourite natural mineral water and play a part in environmental sustainability. That is exactly what the brand is helping them to do.

As soon as recycled PET (rPET) was authorised in Italy for use in natural mineral water bottles, in August 2010, the brand lost no time in becoming the first bottled water brand in the country to incorporate rPET in its one-litre – la litro – format. In a bid to help educate consumers, all Levissima formats now bear an icon to promote recycling, and the one-litre rPET bottles even feature a flow diagram that shows the recycling process in full. To reinforce the recycling message, Levissima has been handing out useful products made from rPET to consumers during in-store promotions, such as shopping bags and bags for separating different categories of household waste.

These initiatives are helping to engage consumers in a virtuous cycle, and to show that bottles can be a resource, not a waste. Levissima guarantees that all its bottles are 100% recyclable; labelling and communication campaigns explain the recycling process and encourage consumers to play their part; and products made from recycled PET are shared with the consumer. Everybody contributes and everybody gains. And so does the environment.

Nowhere is Levissima’s commitment to protecting the environment more focussed than on the Piazz-Dosde glacier itself. The brand has been actively supporting scientists from the University of Milan in an ongoing project to measure and understand the impact of climate change on the glacier.

During the first phase, which began in 2007, researchers showed that it was possible to reduce levels of melting
From Levissima another good sign. Discover Levissima LaLitro, the recycled plastic bottle.

By the continuous efforts of Levissima was born LaLitro still, the new bottle made with 25% of recycled plastic* (RPET) and the same quality to the virgin plastic (PET). Help us to protect the environment by introducing the plastic bottles to the proper recycling through separate collection. Your contribution may seems only a small drop. But those who, like Levissima, always takes care of the water, knows that every drop counts.

ALTISSIMA. PURISSIMA. LEVISSIMA.

*Technical quality check by Levissima plant laboratory – Valdeseo (SC)
This journey begins high in the awe-inspiring Argentinean Andes, one of the purest locations on earth. From this extraordinary birthplace, Eco de los Andes natural mineral water follows a magnificent course through the Andean Cordillera, developing its distinctive identity. In spring and summer, melting snow on Mount Blanco (4,300 metres) and Mount Punta Negra (4,312 metres) flows into the Arroyo Grande basin that lies between these two giants, forming the aquifer for our mineral water. From here, the water races down slopes and meanders through an exceptional landscape before being tapped in the still remote foothills, located at an altitude of 942 metres, 1,000 kilometres from Buenos Aires.

Along the way, through varied geological formations, including igneous rocks that are 250 million years old, the water acquires a rare composition - low sodium content and a pleasant mineral balance - and above all, absolute purity.

Protecting the aquifer

The aquifer is a natural treasure and a precious asset for the Eco de los Andes brand. Since 1996, the quantity and the quality of the water have been monitored, creating an on-going record which will help ensure the aquifer’s future.

"ECO DE LOS ANDES
The heights of pure vitality

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In 1999, the brand started working actively with local authorities to protect the surrounding area. This cooperation led to the approval of a project in 2002, which establishes a set of rules for rational use of the resource by all users. Special steps have been taken to ensure that activities within a designated 2,500-hectare core area around the aquifer do not harm the quality of the water.

**A partnership with a powerful punch**

After all, it is due to its absolute purity that *Eco de los Andes* – equally refreshing in both sparkling and still versions – has built such a strong position in the Argentinean market. The brand was launched in 1994 when the country’s largest beer company, Quilmès, expanded into the bottled water sector. Five years later, Nestlé Waters formed a joint venture with the brewer. Nestlé Waters brought bottled water production and marketing expertise to the partnership; Quilmès provided a broad distribution network, which currently provides 175,000 points of sale for Nestlé Waters brands.

It proved to be an excellent fit: within four years, even against the background of general economic downturn, the market share of Eco de los Andes SA had reached 28%; a figure which rose to 33.5% by 2011 (all brands included, *Nestlé Pure Life, Glaciar* and *Eco de los Andes*).

**New dynamism**

*Eco de los Andes* enjoys a premium brand image: elegance, ultra-light packaging, a unique glass bottle, pricing and communication all play a part.

Brand advertising focuses on its natural purity - “your daily link with nature” - thanks to the water’s protected origins in the heart of the Cordillera. Recently, the brand has focused on another benefit: vitality. A new slogan in 2010 summed it up with the words: “Eco en tu Cuerpo. Vitalidad en tu Vida.” [Eco in your body. Vitality in your life.]. It’s an attractive message for dynamic, young consumers, and one which matches their lifestyle.

Further reinforcing the brand’s dynamic image, *Eco de los Andes* is an active sponsor of sporting events; a valued partner in marathons, tennis tournaments and rugby matches.

Currently ranked third in Argentina’s mineral water market, the brand from the Andes has already staked out a market share of 15.4% and annual sales volumes of 100 million litres.

*Eco de los Andes* is now poised to take on the next challenge – by strengthening distribution, enhancing brand differentiation through its unmatched purity, and consolidating its vitality message, the brand is set to attain new heights.
El Agua de Montaña es Pureza.
Inalterable, eterna en cada momento del día.
Días que explotan en colores, en texturas y en intensidad.
Un ciclo que nos trasciende, que no se detiene nunca
a lo largo de los días, los años y los siglos.
Y así da forma a su esencia, su sello distintivo,
que expresará de un modo sutile cada nota de sabor, y
El Poder de la Montaña.
The new identity ushered in a new phase of commitment to sustainable development. After all, the Swiss take great care of their environment, and so does Henniez. In 2010, the brand started reducing packaging with a new 0.5-litre PET bottle that required 14% less plastic. Early in 2012, the light-weighting continued, reducing PET in 0.33-litre bottles by 17%.

The Swiss brand is also a role model in respecting biodiversity. Two decades ago, Sources Minérales Henniez (the brand’s owner at the time) started planting trees to protect the water resource. Today, the estate - Domaine d’Henniez - includes a park of 70,000 trees over 60 hectares, and 100 hectares of land where intensive farming is prohibited.

Continuing this trend, in 2009, Nestlé Waters initiated an exciting environmental programme, in partnership with local authorities and more than 60 farmers. It’s called ECO-Broye (after the river running through the Henniez region), and it’s all about stimulating and coordinating eco-friendly initiatives to harmonize strategic local economic development while maintaining the region’s environmental resources, in particular groundwater, in the long term.

The first initiative put in place was the natural filtration area. Selected plants - capable of
absorbing unwanted elements in the water - have been introduced, and if they prove successful in clearing the surface water, the practice will be applied to the waste waters of the Henniez factory. Another initiative encourages biodiversity through the establishment of “ecological corridors”, a state programme, throughout 1,500 hectares of farmland across the Henniez area and neighbouring municipalities.

The programme, which aims to protect the water and all natural resources around the estate on a partnership basis, is inspired by Nestlé Waters’ award-winning AGRIVAIR project in the Vosges region of Eastern France. For the past 20 years, AGRIVAIR has been uniting local stakeholders to protect the Vittel, Contrex and Hépar water resources, with initiatives such as helping farmers to replace chemical pesticides with ladybirds.

ECO-Broye is also building a biogas plant to turn organic and industrial waste into sustainable energy. Local farmers and businesses – including the nearby Nespresso factory – will be able to dispose of their waste, while the biogas generated should eventually provide for almost half the gas needs of the Henniez bottling factory. What better way to be environmentally friendly?
ERIKLI - The secret of success in Turkey

A lot is happening in Turkey right now, where the country’s number one bottled water brand, Erikli, has been reaping the rewards of a ground-breaking communication campaign. The brand is striding out ahead in a highly fragmented market by extolling the virtues of great taste, building brand loyalty, and making the most of a distribution scheme developed to satisfy very specific consumer expectations.

But before we look at recent successes, let us first introduce the brand and the market where Erikli is the undisputed leader.

The source of Erikli spring water is the magnificent mountain of Uludag in Western Anatolia, whose distinct outline graces the labels of all bottle formats. The mountain’s snow-capped peak and wooded slopes harbour mythical qualities and are home to a rich flora and fauna. The geological strata of the mountain give rise to a water whose purity and mineral structure produce a unique taste that is soft and delicate: “Turkey’s best tasting water”, is the verdict of consumers here.

Considered a premium brand within Turkey’s still water sector, Erikli reaches more consumers in this market than any other brand, with a distribution network that extends over much of the country. Consistent high quality, leadership and expertise are key brand attributes identified by consumers.

This strong image is important because the Turkish bottled water market is a crowded place to be, with more than 300 players and a host of local brands. Another distinguishing feature is the importance of the HOD sector - which accounts for more than two thirds of the market. Almost one in two households still regularly takes delivery of 19-litre bottles.

In recent years, however, growth in the HOD sector has slowed, while the retail market has become more important. Changing lifestyles, the convenience of smaller formats for smaller families and competitive pricing are all factors which help to explain the current growth of the retail sector - up by 9.6% at the end of 2011. Erikli is the brand which has contributed most to this increase, both in terms of volume and sales value:
signs of a true leader. So, how has Erikli achieved - and how does it continue to strengthen - this top position?

Firstly, the brand’s consumer service is unrivalled. Erikli can count on a service call centre with almost 60 dedicated staff ready to respond to consumers’ needs and concerns. Issues are dealt with immediately and effectively - and that builds confidence.

Secondly, Erikli has a unique distribution scheme which meets the challenge of transportation over long distances, from the bottling plant to far-flung districts - both for the HOD and retail markets. Eight Nestle Waters distribution centres exist in key cities in different regions. With a fleet of 100 trucks and 200 smaller delivery vehicles, these centres are the hub of Erikli’s distribution network in major conurbations.

However, in a country as vast and varied as Turkey, reaching as many consumers as possible calls for partnership and flexibility. In the retail sector, the distribution centres are part of a hybrid route-to-market strategy, leveraging a range of options to ensure a strong multi-channel presence.

In the HOD sector, the brand’s own distribution centres and chosen partners deliver to a network of 300 “watershops”, which, in turn, deliver to the consumer. Erikli controls the network and related database; the “watershops” and their vehicles - 15,000 in total - are managed by partners.

Thirdly, leadership has been strengthened by promoting taste and origin as the essence of the Erikli brand. It has proved a winning combination: a unique taste that is inextricably linked with the seductive powers of Uludag, and its inhabitants.

Shhh! However hard you search, the reason why Erikli tastes so good is a closely guarded secret, hidden at the very summit of Uludag. The mountain’s squirrels and bears and other animal friends are determined to keep it that way.

This is the thrust of the hugely successful communication campaign, rolled out throughout Turkey last summer (2011), which reached around 10 million people and helped to boost annual sales volumes beyond one billion litres.

It was a bold strategy. Although taste is important for Erikli consumers, actually talking about taste was new in the Turkish bottled water market. Introducing live animals into the campaign was also a first. But courage and creativity paid off: who could resist the bright-eyed squirrel raising a tiny paw to its lips to protect the precious secret?

The campaign targeted media and trade communications, including TV, outdoor advertising, newspaper and printed materials, in-store and point-of-sale applications, and vehicles.

Awards came flooding in: voted best newspaper and magazine advert and fourth best TV commercial by Ekonomist; second best TV commercial by readers of Marketing Turkiye; and in the top two most-watched episodes of “Best Commercial” by CNN’s Turkish channel. Even in 2012, the campaign won “Best Advertising Photography” in the country’s prestigious Kirmizi Awards.

There is no doubt that today, more people than ever know that Erikli is the best tasting water in Turkey. And that is definitely no secret.
North America’s Regional Brands

Proudly Regional, Totally Natural

Nature reigns in America’s north-eastern state of Maine, a place covered with forests, wetlands and rolling mountains. One of the totally natural products this environment gives rise to is the region’s favourite bottled spring water: Poland Spring. At the entrance to the park where the brand is bottled, a sign on the wall sums up the prevailing mood: “Stress Free Zone”.

Poland Spring is just one of six regional spring water brands in the Nestlé Waters North America family. All are the product of peaceful, natural sources. Some, like Poland Spring, have been bottled for over 100 years. The story of Nestlé Waters North America, however, is a more recent tale. The company was set up in 1976 to introduce the sparkling French brand, Perrier, in the North American market. Right from the start, Perrier appealed to active, health-conscious Americans, and a new bottled-water culture was born.

In 1980, the company began to seek other brands, looking for quality, distinctive taste, a strong regional following and a rich heritage. Poland Spring was the first domestic bottled spring water brand the company added to its portfolio.

Others followed in 1987: Arrowhead, from mountain sources in the West, Zephyrhills from Florida springs where the water is naturally filtered through mineral-rich limestone, and Ozarka, which draws its distinct flavour from several Texan springs. Soon after, Ice Mountain, originating in the Great Lakes region of the Midwest, and Deer Park, from Pennsylvania in the Northeast, joined the fold.

A striking feature of each of these brands is a strong regional identity - a particularly American trait. Each brand figures among the leaders on its own home turf, and together they span the country from east to west.

This regional diversity was celebrated in 2009, when Nestlé Waters North America launched a TV campaign called Born Better. The advert highlighted the 100% Regional, 100% Natural origins of each brand, and showed how water is naturally filtered as it travels underground, absorbing a distinct blend of minerals along the way.

Of course, delivering natural spring water to the consumer requires bottles, and Nestlé Waters understands that reducing the amount of plastic in its bottles - “light-weighting” - is one of the best things a beverage company can do to improve its environmental performance. Between 2000 and 2006, all six regional brands reduced the amount of plastic (PET) in their bottles by 40%. In 2007, the company went further, introducing an innovative 0.5-litre Eco-Shape® bottle, which weighed 12.5 grams on average, and used 30% less plastic than similar containers.
Three years later, it was time for the next-generation Eco-Shape® bottle. Now down to an average weight of 9.3 grams, the bottle uses 60% less plastic than the company’s pre-Eco-Shape® PET bottles, first introduced in the mid-1990s. But that was not the end of the company’s quest for optimised environmental packaging performance. Deer Park made another leap forward in 2011, introducing 0.5-litre bottles made from 50% recycled plastic (rPET) in the Baltimore and Washington, DC regions. Today, nearly a quarter of Deer Park’s bottles are made from rPET.

For Deer Park, this new bottle served as a springboard to educate consumers about recycling. With the help of a mobile vehicle and its walk-through exhibit, the brand showcased the recycling process, along with products that can be made from recycled PET in the Greater Washington, DC area.

Over on the West Coast, Arrowhead is set to follow suit. A new bottle-to-bottle plastic recycling plant in Riverside, California will be supplying the recycled plastic content for Arrowhead 50% rPET 0.5-litre bottles. It promises to be one of the country’s largest plants of its kind.

The regional spring water brands are also active when it comes to helping Americans with healthy hydration. This is important as more than one third of children and more than two thirds of adults in the US are overweight or obese(1).

Last year, the brands joined forces to release “Nature’s Fix”, a campaign to encourage healthier drinking habits. Rolled out via banners, videos and on Facebook, the campaign featured animated forest animals working together to get people “hooked” on calorie-free, sparkling versions of each brand, comprising spring water, natural fruit essence and effervescence!

The brands have come up with other product innovations in response to consumer feedback. Take Poland Spring’s Nature’s Blend, for example: three natural ingredients – spring water, real fruit juice and cane sugar - mixed into one refreshing beverage. Each 8-oz (0.25-l) serving packs in lots of natural flavour and just 50 calories.

And for caring parents, all regional spring water brands are now available in mini 8-oz to-go bottles with labels where mums and dads can write their child’s name. That way, kids don’t mistakenly pick up someone else’s water bottle – and germs.

Sustainable, healthy and innovative: that’s the recipe which makes these regional brands the natural leaders of the US bottled water market.

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“DASHAN
The sweet taste of home

Our local brands are much more than favourite characters on their home turf. They are pivotal in the bigger story of our Nestlé Waters development strategy in key markets. Take China, for example; a country with a competitive bottled water market which features a myriad of local players, and a forecast for double-digit growth.

Having initially established a foothold in the huge cities of Beijing and Shanghai with Nestlé Pure Life, we are now actively strengthening our position by forging partnerships and selectively acquiring key local brands. To illustrate this approach, let us take you to the sunny province of Yunnan in the southwest of the country. Here, we have acquired a 70% stake in Yunnan Dashan Drinks Co. Ltd., the company which produces the leading bottled water brand, Dashan.

Consistently voted the “Happiest Province” in China, Yunnan is a place of mountains and lakes where pristine nature still exists, and where a spring climate reigns for most of the year. Its people are deeply attached to their homeland and proud of their unique cultural identity. No fewer than 25 ethnic groups live in harmony here, all contributing to the rich fabric of local tradition. This is a place where people know what they value most: quality of life and a strong sense of belonging.
Not surprising, then, that the people of Yunnan choose Dashan above all other bottled waters. Drawn from a protected underground source, the water is valued for being natural and local, for its specific mineral composition, and for its smooth, sweet taste.

The brand rose to its top position thanks to Yunnan Dashan Drinks Co. Ltd.’s deep understanding of local consumers, its entrepreneurial management style, and a strong distribution network - both in the retail sector and in city-based HOD operations.

Now that Dashan is in our hands, we are working with our partners to make the brand even stronger. What we bring is expertise and excellence in technology and manufacturing, along with our marketing skills and brand building experience – what we call BBNW (Brand Building the Nestlé Way).

New eye-catching labelling - for both bottled water and bulk formats - is one tangible result of the partnership.

Increasing appeal to consumers, the label evokes Yunnan’s natural landscape, gives details of the mineral content, explains the water cycle and includes the Nestlé Waters taste logo - linking Dashan to one of our six taste clusters. What’s more, true to the spirit of Yunnan’s strong sense of cultural identity, bottled water labels also feature a “collectable” series presenting 18 of the most unusual local traditions: tourists are intrigued, and local people are heartened to see that we care about their culture.

As to the future, Dashan’s access to water resources provides a valuable platform for building our Dual Brand Approach, paving the way for Nestlé Pure Life to develop alongside Dashan in this important provincial market. This strategy, in turn, fits our vision for a three-pillar business model in China - reflecting our three-tier brand portfolio - which aims to offer consumers a range of choices from our family-value Nestlé brands, through leading local brands, to the premium international sparkling brands.
Completing the portfolio, and complementing our sparkling international stars and line-up of local brands, is our omnipresent family favourite - Nestlé Pure Life. The world’s top-selling bottled water brand knows how to fit in and flourish all over the globe, extending our ability to offer healthy hydration to millions more people.

PUTTING FAMILY HYDRATION FIRST
In less than the time it takes you to read this sentence, 1,100 glasses of Nestlé Pure Life will have been enjoyed around the world. That is the rate at which consumers are drinking the world’s leading bottled water brand, every single second.

The global success of this mega-brand is a phenomenal achievement. Present in 41 markets, the Nestlé Pure Life brand has carved out 4.1% of the worldwide bottled water market share. That’s a sizable slice for a single brand. A staggering 8.5 billion litres of the brand were sold in 2010, making it the world’s bottled water leader in both volume and value. Adding to the acclaim, Nestlé Pure Life stands proudly on the podium as one of the three top bottled water brands in no less than 14 countries, including the US, Canada, Spain, Egypt, Pakistan, Thailand and China.

With such an impressive track record, it is not surprising that Nestlé Pure Life is one of the Nestlé Group’s top brands. What explains this extraordinary success? The Nestlé name has got a lot to do with it: instantly associated with quality and safety, it is a key factor for growth. But the brand itself has all the credentials of a world leader: Nestlé Pure Life’s simple, yet vital, message is Healthy Family Hydration, and its goal is to make each generation healthier than the last.

Adding to this winning combination of assets and appeal, the brand has proved adept at communicating to consumers. Nestlé Pure Life is recognized the world over as the brand that brings healthy hydration to families everywhere. In 2008, the first global campaign, called Aqualand, was launched, presenting the brand message of Healthy Family Hydration in a host of different markets. Rolled out in 17 countries, the campaign helped to seal the success of the mega-brand strategy. In 2011, the brand’s positioning and its benefits to consumers were further reinforced in a new campaign called Harmony. Viewers were invited to discover the power of hydration through the dramatic visual imagery of the campaign film: set against a clear blue sky, the white-clad children of a youth orchestra are beginning to wilt in the midday sun. The camera then gives viewers a bird’s-eye view as blue-swathed figures emerge and weave their way through the musicians, bringing much needed refreshment and hydration - and reviving the players and the music!
The path to mega-brand stardom

The launchpad for all this was Pakistan, back in 1998. Ever since, Nestle Pure Life has been striding successively - and successfully - into new markets. The brand first set foot in Europe in 2000, and then crossed the Atlantic in 2002 to spread its message in the United States - a market where it would rise to become the number one bottled water by 2010. Yet, two years before the brand was crowned as leader in the US, Nestlé Pure Life had already taken the pole position in the global bottled water market: remarkably, by 2008, more Nestlé Pure Life was being consumed than any other bottled water brand in the world. During this fast rise to stardom, the brand’s essence - Healthy Family Hydration - was adopted by the two other Nestlé brands - Nestlé Vera and Nestlé Aquarel. Since 2008, the three brands have been moving towards a single worldwide Nestlé brand - a journey which is gathering momentum, particularly in Europe. The objective is to leverage Nestlé Pure Life’s mega-brand status, replacing Vera and Aquarel with Pure Life in markets where it has greater sales potential. Poland, Spain and Hungary adopted the Nestlé Pure Life identity in 2011. France & Belgium fully embraced Nestlé Pure Life in early 2012.

The local element of global success

Nestlé Pure Life is a global success because, time and again, it has proved that it understands how to be a local success. In each market, it is simply the most relevant bottled water brand for consumers. Communication in every country or region is built on the simplicity of universal human truths, and none is more pertinent than Healthy Family Hydration, a message which makes sense wherever you live. Yet, as Nestlé Pure Life knows, getting big ideas across successfully depends on first testing them in the local environment and then delivering them via campaigns which are designed to strike a chord with local consumers. That, it seems, is the secret of Nestlé Pure Life. And - wait a second - another 1,100 glasses of Nestlé Pure Life have just been downed to prove it.

*Source: Nielsen December 2011 (19 countries)
**Source: Zenith 2010, Bev. marketing for USA, Canada)
[1] Nestlé Pure Life is sold under the name of Nestlé Vera in Italy and Nestlé Aquarel in some European countries.
Nestlé Pure Life in the US

Helping American families lead healthier lives

On a beach in Alabama, in a bank in Illinois, or on the shelves of a wholesale store in Connecticut, Nestlé Pure Life is everywhere, quenching the nation’s thirst and encouraging Americans to drink water as part of a healthy lifestyle.

In just one decade, Nestlé Pure Life has become the leading bottled water brand in the United States. That’s good news for America, because the brand is all about ensuring the well-being of consumers’ families through healthy hydration - at an affordable price.

In North America, our champion of healthy family hydration is a purified water enhanced with a blend of minerals, to give that great taste. Being closer to the consumer, keeping costs down and improving environmental performance are all possible because Nestlé Pure Life is produced in different locations throughout the country.

So, just how did this pioneering brand conquer the US? The story began back in 2002. Nestlé Waters started producing the brand from just two springs in Canada, selling it exclusively in Wal-Mart, the world’s largest retailer. From the outset, the brand proved a hit, and Nestlé Pure Life has seen double-digit volume increases every year since.

Along the way, the brand took an important step in 2007, making its 0.5-litre bottle – the most popular format in the US - available in Nestlé Waters’ innovative Eco-Shape® bottle, the lightest plastic bottle on the market.

Nestlé Pure Life began arriving on the shelves of a lengthening list of big store retailers, such as Safeway, Kroger, Publix, Sam’s Club and Costco. The brand was also successfully moving into smaller scale retail outlets: convenience stores, drugstores, gas stations, fast-food restaurants and vending machines - in fact, everywhere people needed to find bottled water.

By 2008, consumers had become familiar with the brand, and it was time for Nestlé Pure Life to start talking with them. Its first national television advertising campaign brought to life the very essence of the brand – Healthy Family Hydration.

It was a timely message, as public health was beginning to preoccupy the nation’s conscience: according to...
the US Department of Agriculture (USDA), more than one third of the country’s children and more than two thirds of adults are overweight or obese[1].

Although this issue is the result of many factors, nutrition is clearly one of them - as spelt out in a USDA brochure[2]: “Many people eat foods with too much solid fats, added sugars, and salt (sodium)”. Take, for example, the calories consumed from sugary beverages. The average American gets over 20% of their total caloric intake each day from beverages, whereas research suggests that this should be closer to 10%[3].

A complex issue like obesity calls for a range of solutions, and the prevailing consensus is that these include encouraging people to lead healthier lifestyles, adopting healthier eating and drinking habits, and taking more exercise.

Many institutions are stepping up to face the challenge, and the USDA, whose mission is to improve the health of American families, is in the vanguard of change. Every five years, the USDA issues Dietary Guidelines for Americans, highlighting key recommendations. The latest 2010 guidelines include the clear message: “Drink water instead of sugary drinks”[4].

This makes absolute sense to Nestlé Pure Life. After all, the brand upholds the belief that drinking water regularly, throughout the day, is part of the solution; it is also committed to spreading the word and educating Americans on healthy eating and drinking habits.

In doing so, Nestlé Pure Life has been making an impact among Hispanic families in particular - a growing segment of bottled water consumers in the US. Along with the mainstream nationwide campaign, the brand launched a more targeted TV campaign to appeal to Hispanic mums. The aim was to build awareness of Nestlé Pure Life as the perfect choice for family hydration, and to advocate the benefits of bottled water.

To this end, Nestlé Pure Life found the ideal partner in the shape of the Hispanic television host and celebrity, Cristina Saralegui. A perfect spokesperson to get the message across, Cristina Saralegui grew up in Cuba, has spent 20 years in the spotlight, and is a respected advocate of family health in the Hispanic community.

The campaign featured Cristina in a series of five interviews addressing different themes, such as trust in the Nestlé brand, obesity and diabetes. It was backed up with point-of-sale materials and online promotions...
via Cristina’s website and the Nestlé Pure Life site. One example: the interactive platform “Vive Sanamente” (“Live Healthily”), which invited consumers to share stories about healthy changes in their own families’ lives.

The result was dramatically higher market share within the Hispanic community around the country. What’s more, by the end of 2008, against a backdrop of widespread economic downturn, Nestlé Pure Life had risen to the top of the entire US bottled water market.

Far from resting on its laurels, Nestlé Waters launched another endorsement campaign in 2009 - this time with Bob Greene, a well-known nutrition and fitness coach, and personal trainer of Oprah Winfrey, the wildly popular American TV host.

A groundbreaking TV campaign in 2011 - The Light Bulb Moment - highlighted that instant when the penny drops and something suddenly makes sense – in this case, to offer water as an alternate beverage for children instead of sugary drinks. As for variations on a trusted theme, Nestlé Pure Life Splash has recently been re-launched boasting four new flavours – a tasty and refreshing calorie-free hydration option with a splash of natural fruit flavours. Yes, there’s still a way to go to beat the obesity epidemic, but the good news is that even a few lifestyle changes can help Americans lead healthier lives.

And a final word: First Lady Michelle Obama launched the “Let’s Move!” initiative two years ago, to combat childhood obesity. The programme website pulls no punches: “Everyone has a role to play in reducing childhood obesity, including parents, elected officials from all levels of government, schools, health care professionals, faith-based and community-based organizations, and private sector companies.” Nestlé Pure Life is committed to playing its part.
Nestlé Pure Life in Mexico

Winning over kids with water that’s fun to drink

Launched in Latin America in 2008, the children’s version of Nestlé Pure Life has been a huge success in Mexico. Young consumers there just love these “Aguitas”, sold either as plain water or enhanced with fruit flavours.

Seen through the eyes of children, Nestlé Pureza Vital Aguitas is water the way they love to drink it. Seen through the eyes of mums and dads, Aguitas have much to offer: fruit-flavours – orange, apple, grape, mango and guava – and low calorie content on top of hydration benefits.

With Aguitas close to hand, hydration is fun! The round-shaped 0.33-litre bottle, with a label featuring popular Looney Tunes cartoon characters, is typical of the attractive, playful packaging.

The range has sprung up in Mexico’s main supermarket chains, and in places where kids congregate, such as schools, parks and exhibitions. Indeed, after just one year of existence, Aguitas moved ahead of its direct competitor, Frutsi, which has been on the market for 30 years. This rise to prominence was backed by a full-blown promotional campaign featuring favourite figures from the Looney Tunes, and boosting awareness that healthy hydration matters - especially for children.

Encouraging kids to drink more water and persuading parents to offer their kids healthy products are key features of the Nestlé brand’s mission to promote Healthy Family Hydration.

In this respect, Aguitas arrived at the right time. Mexico is ranked highest in the world for child obesity, and the consumption of sugary drinks is very high, especially among children. The country also has the world’s second highest obesity level for adults. To reverse this trend, the government, communities and industry are working together to help educate people towards having a more balanced diet.

To this end, the popular Papalote Children’s Museum, in Mexico City, was a symbolic venue for Waters Partners Mexico – Nestlé Waters in Mexico – to spread the word during a press event held...
at the end of 2011. The message? Promote daily hydration as a fundamental health practice for children. Let’s all drink to healthy kids!

"Nestlé Pure Life in the Middle East and Africa

Giving consumers confidence and choice

Winning hearts and minds throughout the Middle East and Africa (MEA) markets, Nestlé Pure Life has gone from strength to strength since its launch in Pakistan in 1998. Introduced at a steady rhythm, the brand has made its debut in several new countries per year, so that today, Nestlé Pure Life is reaching consumers in Egypt, Iran, Jordan, Lebanon, Saudi Arabia, Bahrain, Qatar, Dubai, the United Arab Emirates and Turkey. In most of these markets, the brand is sold alongside an established local brand from the Nestlé Waters portfolio.

A look at the market figures underlines the brand’s ability to provide safe and refreshing hydration throughout the zone. In 2011, more than 1.2 billion litres of Nestlé Pure Life were sold in the MEA markets, spearheaded by Saudi Arabia (which accounted for 15% of the total sales volume) and Egypt (10%).

The Nestlé name itself serves as a springboard to success in this part of the world, where consumers associate the brand name with food quality and safety. As for the reputation of Nestlé Pure Life in particular, it has grown on the basis of the consistency of its message – Healthy Family Hydration – shared through innovative communications campaigns.

Time to zoom-in on some of the key markets in this exciting zone:

Pakistan

Pakistan occupies a special place in the story of Nestlé Waters, because it was here, in December 1998, that the company launched Nestlé Pure Life - the company’s first bottled water brand to be rolled out globally.

Back then, the bottled water sector was still in its infancy in Pakistan, and as the brand developed, the bottled water market took shape
in the country. Indeed, in Pakistan, Nestlé Pure Life and bottled water evolved hand in hand. Success from the earliest days was built on two firm pillars: clear positioning of the brand as the choice for healthy family hydration, and strong communication, based on purity, safety and trust. What better messages to establish brand equity in the minds of target consumers, particularly because of a growing awareness in the country of health risks linked with using tap water, boiled water or filtered water.

Being seen is important when it comes to winning over consumers. To ensure that Nestlé Pure Life is widely visible and available, the brand relies on a dedicated sales and distribution network, with no fewer than 560 distributors nationwide. Together they help increase access to healthy hydration, in line with the brand’s commitment to be available to consumers “whenever, wherever and however”.

This all adds up to explain why Nestlé Pure Life has the highest brand equity of any bottled water on the market. Indeed, in an independent international brand tracking study conducted in 2011, consumers in the brand’s target group professed 100% awareness. And to add to these impressive statistics, the brand has a value market share of almost 50%. Without question, Nestlé Pure Life sets the benchmark in the country’s bottled water industry and has truly earned its reputation as Pakistan’s favourite drinking water.

**Jordan**

Launched in 2000, Nestlé Pure Life was the first international brand to join the ranks of numerous local brands on the Jordanian market. Its subsequent success has been driven by the excellent reputation of the Nestlé name in the market. After a crisis in 1998, when public water supplies were contaminated, Jordanians were looking for a bottled water that they could trust. The Nestlé brand guarantee of safe, healthy water gave just the reassurance that consumers needed. Positioned from the outset as a premium brand, Nestlé Pure Life became the preferred choice for the country’s luxury hotels and top restaurants and coffee shops, thus enhancing its top-of-range image. The image-conscious Jordanian consumers, switched to Nestlé and the brand’s renown continued to grow. When Nestlé Pure Life launched its five-gallon format for home and office delivery, brand awareness rose even higher.

Today, Nestlé Pure Life is distributed directly by Nestlé Waters Jordan through three key distribution centres. Amman - the capital city and home to 70% of the country’s population - is the site of the main centre, which represents 70% of the volume sold, through more than 4,000 points of sale. Further north, the Irbid centre represents 10% of the volume sold, via more than 1,000 points of sale. As for the south, the Aqaba factory and distribution centre account for 20% of total sales, via 1,500 points of sale.
Lebanon

Bigger is better in Lebanon, where bulk formats are a notable feature of Nestlé Pure Life’s success. Since 2001 the brand has been positioned here as table water, offered in two-litre, five-litre and five-gallon bottles. Initially, the young brand grew significantly, although development slowed when water resource issues affected output at the Falougha factory. A new factory, dedicated to the five-gallon bottle format in Ain Zhalta, was brought on line in 2010 and has been instrumental in resuming growth.

The Nestlé name was already well known here too, having been present for the last 75 years; a factor which helped Nestlé Pure Life to capture consumer interest at a slight premium over competitive brands. The brand’s communication has been consistently centred on clear hydration benefits and leveraged on Nestlé’s existing positive image and reputation. All this has paved the way to building Nestlé Pure Life’s own reputation and trust among consumers. In doing so, the brand has moved ahead of competitors marketed as natural mineral waters, with all formats outperforming local brands.

When it comes to distribution, route-to-market includes direct distribution to trade and weekly deliveries to five-gallon customers. Regular deliveries and outstanding service - far superior to competition - have secured enviable customer loyalty.

Egypt

When Nestlé Pure Life arrived in Egypt, also in 2001, it could draw on a tried-and-tested combination of enviable assets to ensure the brand’s success: the respected Nestlé name, a platform for innovation, the brand’s pleasant taste, and effective communication. In addition, Nestlé Pure Life chose Egypt to pioneer a Safety Sleeve which highlighted that the bottled water was a Safe and Healthy product.

Here, Nestlé Pure Life has rapidly become “the” family bottled water brand. With its unique bottle design, an international image and competitive pricing, it has won the hearts of the population’s trend-setters, and become the bottled water families aspire to. Available in a wide range of formats - including re-sealable sports caps and kids’ bottles - the brand is popular in many market segments. In terms of distribution, efficiency is key: a range of strategies and specific innovations ensure direct contact with consumers, including tourists.

Today, in spite of political uncertainty in the country since 2011, Egypt continues to be one of the most successful markets for Nestlé Pure Life.

In all corners of the MEA zone, the brand inspires confidence in consumers and has become a firm friend for families seeking healthy hydration.
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Nestlé Waters
since 2007
American, born in 1951

Kim Jeffery
President & CEO
Nestlé Waters North America
since 1992
American, born in 1948

Denis Cans
CEO
Nestlé Waters France and Belgium
since 2007
French, born in 1951

Alain Randon
Senior Vice-President
Finance & Control
since 1992
French, born in 1947

Bruno Le Ciclé
Senior Vice-President
International Marketing, Sales & Communication
since 2010
French, born in 1962

Steve Bendix
Senior Vice-President
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American, born in 1959
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Austrian, born in 1958

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German, born in 1965
2011
ENVIRONMENTAL INDICATORS

ENERGY: -23%
Nestlé Waters reduced its non-renewable energy consumption per litre produced by 23% in its factories between 2006 and 2011.

PACKAGING: -15%
Nestlé Waters reduced packaging weight per litre produced by 15% between 2006 and 2011.

WATER: -28%
With 0.615l of additional water used to produce one litre in 2011, Nestlé Waters has reduced its water use ratio by 28% in its factories since 2006.

2011 KEY FIGURES

SALES
CHF 6 520 million
(EUR 5 292 million)
7.8% of Nestlé Group sales

ORGANIC GROWTH
5.2%

RIG(1)
3.4%

COP2 (2)
CHF 519.7 million
(EUR 421.8 million)

MARKET SHARE(3)
12.4%

EMPLOYEES
32,200

PRODUCTION FACILITIES
101 plus 3 joint with Nestlé

PRODUCING COUNTRIES
36

BRANDS
64

(1) RIG: Real Internal Growth
(2) COP2: Consolidated Trading Operating Profit Margin
(3) Estimation in value
2011 SALES ANALYSIS

BREAKDOWN BY GEOGRAPHIC ZONE

- NORTH AMERICA: 49.7%
- EUROPE: 34.2%
- ASIA OCEANIA AFRICA: 12.0%
- LATIN AMERICA: 4.1%

BREAKDOWN BY DISTRIBUTION CHANNEL

- RETAIL: 84.9%
- HOD: 15.1%

BREAKDOWN BY BRAND

- LOCAL: 55.9%
- INTERNATIONAL: 20.7%
- NESTLÉ: 23.4%

No. 1 BOTTLED WATER COMPANY WORLDWIDE

No.1 IN NORTH AMERICA
No.1 Canada, United States

No.1 IN EUROPE
No. 1 France, Hungary, Italy, Switzerland
No. 2 Belgium, Germany, Poland, United Kingdom
No. 3 Spain

No.1 IN AFRICA & THE MIDDLE EAST
No. 1 Bahrain, Egypt, Jordan, Lebanon, Qatar, Saudi Arabia, Turkey, Uzbekistan
No. 3 South Africa

ASIA
No. 1 Pakistan, Vietnam
No. 2 Thailand
No. 3 South Korea

LATIN AMERICA
No. 1 Cuba
No. 2 Argentina

*based on the global market in value
“2011 in images

January

Argentina: Eco de los Andes Targets Active Young People

Nestlé Waters’ Argentinian brand revamps its identity and airs a punchy TV ad, meeting the new positioning embodied by the slogan “Eco en tu Cuerpo. Vitalidad en tu Vida” - Eco in your Body. Vitality in your Life.

Nestlé Waters: Preferred Partner for Sodexo

This new international agreement with the worldwide number two in institutional catering puts Nestlé Waters in the position of Sodexo’s preferred bottled water supplier for the next few years. Based on solid ground and reinforced cooperation, the agreement offers important opportunities for joint communication on healthy hydration.

February

Deer Park Delivery Trucks Go Hybrid in Maryland

Once again, Nestlé Waters North America positions itself as an environmental leader as the company acquires 23 hybrid trucks to deliver five-gallon bottles in Maryland. This initiative is being financed in part by grant funding from the American Recovery and Reinvestment Act, also known as President Barack Obama’s Economic Stimulus Plan.

March

China: Nestlé Waters Reinforces its Presence in HOD

With the acquisition of The Waterman Co. Ltd., Nestlé Waters strengthens its positions in China, just a year after a joint-venture partnership was signed with Yunnan Dashan Mineral Water Company. Waterman has been an important player and a trusted brand in the Home and Office Delivery (HOD) market in China for over 10 years, with well-established presence in Shanghai and its region.

April

Nestlé Waters on the April Marathon Departure Lines

Nestlé Waters takes part in no fewer than three international marathons in April: with Vittel in Paris, Nestlé Pure Life in London and Poland Spring in Boston. Tens of thousands of runners and participants quench their thirst with these three brands, boosting visibility and legitimacy of the brands as the best way to maintain optimal hydration during exercise.
Mixology by Perrier Launches Cocktail Parties in Supermarkets

With a premiere in a Carrefour store, the Perrier Mixology bar turns heads in the many supermarkets it visits across France. Staying for five days at a time and staffed by barmen, the Perrier Mixology bar offers the public a unique opportunity to taste a selection of cocktails invented by Perrier’s Mixology master, Laurent Greco, right in the stores.

May

Earthquake in Japan: Nestlé Waters North America Donates 100,000 Bottles of Arrowhead

Nestlé Waters North America and Nestlé Japan Ltd., together with Boston Red Sox pitcher Mr Daisuke Matsuzaka, donate 100,000 bottles of Arrowhead 100% Mountain Spring Water to the Tohoku earthquake-affected areas.

Nestlé Waters North America Agrees to Purchase Sweet Leaf Tea Company

Nestlé Waters North America signs an agreement to acquire the Austin-based Sweet Leaf Tea Company, which includes the Sweet Leaf® and Tradewinds® beverage brands. Sweet Leaf Tea Company, founded in 1998, is known as much for its creativity and passion for community as it is for its high-quality teas.

June

Is the World Ready for Perrier’s Latest Digital Campaign?

Perrier launches a worldwide digital experience unlike any other brand promotion – a social media-gone-extreme innovation. A trend-setter known for its provocative branding, Perrier surpasses its own innovation with a fully interactive, daring new video, Le Club Perrier, which will evolve as the number of viewers grows. The more views the video gets, the hotter the party will be. It is the party of the summer!

Nestlé Pureza Vital Arrives in Cuba!

Nestlé Waters and its “Los Portales” joint-venture operation in Cuba, strengthen their leadership position in the beverage market with the launch of Nestlé Pureza Vital. This brand is now available in Cuba in two PET pack sizes (0.5 l and 1.5 l), bottled at the Palmira factory and distributed throughout the country, with a special focus on Havana’s best hotels and restaurants and tourist areas like Varadero.

Groundbreaking: Construction Starts at New State-of-the-Art Buxton Plant

On 14 June 2011, Nestlé Waters UK marks the official start of construction at its new state-of-the-art plant. The new, best-in-class facility for the Buxton and Nestlé Pure Life brands will boast greater capacity
and increased environmental performance. It will, for the first time, bring the bottling facility and warehousing capability under one roof and create one of the most innovative and efficient bottling lines in the world.

**July**

**Fans Show their Colours at The Tour de France**

To celebrate the flows of spectators following the Tour de France in their motor homes, driving for part of the trip or the entire length, Vittel, the official water of the Tour de France, and the French magazine *Camping Car* have developed a special contest just for them. The two most original Vittel motor homes spotted on the Tour are invited to take part – in their motor homes decked out in Vittel colours – in the final arrival parade on the prestigious Champs-Elysées avenue in Paris.

**New Mina d’Ouro Plant, a Goldmine for Nestlé Pureza Vital**

Mina d’Ouro, or goldmine, is the name of the new Nestlé Waters operation in São Paulo, Brazil. It supplies the greater São Paulo area with Nestlé Pureza Vital 1.5-litre and 0.5-litre bottles.

**September**

**MyContrexperience Makes a Hit**

“Slimming would be easier if it were more fun!” With this message, Contrex launches an innovative, multichannel advertising campaign that is topping all the popularity charts!

Built on a fun, dynamic TV film based on an event in which women burn calories while enjoying themselves, a series of radio commercials, a fun-filled Facebook page with slimming tips and a “don’t crack” alert system, MyContrexperience campaign will prove to be overwhelmingly successful with over 50,000 Facebook fans and a film watched over 25,000,000 times.

“Protect Lebanon, Recycle Today”

Launched by Nestlé Waters in Lebanon in partnership with leading waste management service provider Servicorp, and Spinneys, the number one domestic supermarket franchise, this PET recycling initiative consists of installing reverse vending machines installed at the entrance of Spinneys supermarket locations to collect all kinds of PET bottles and aluminum cans. Holding up to 600 bottles or cans, the machines recognise non-recyclable materials and deliver printouts of the bottle redemption count upon request.

**August**

**Gerber Water, a Very Successful Brand for Babies in Mexico**

Managed by Nestlé Waters’ joint venture since 2008, Gerber Water is a hit and becomes a mega-brand in baby nutrition in Mexico, with a brand awareness rate of 80% among mothers with young babies.

**Nestlé Waters North America Launches Nature’s Fix Campaign for Healthier Habits**

The Nature’s Fix campaign aims to persuade more consumers to drink its bottled water brands as a healthy, zero-calorie alternative to sodas and fruit juices. The humorous campaign, rolled out through banners, videos and Facebook, shows forest animals working together to get people “hooked” on sparkling waters as a new, healthy daily habit.

**October**

**Awafrut: Adding Health and Taste into Flavoured Water in Argentina**

*Nestlé Pureza Vital Awafrut* is a completely new generation of water with added fruit juices, replacing an existing range of NPL flavoured variants. With soft drink consumption per capita reaching 120 litres annually in Argentina, Awafrut is meant to capture the most nutrition conscious amongst those CSD heavy users with a healthier and more natural hydration alternative made of water and added fruit juices in three flavours: grapefruit, apple and orange-peach.

**November**

**Sanpellegrino: Proud Champion of “Made in Italy” Quality**

Confindustria’s prestigious Andrea Pininfarina Award of Excellence acknowledges Sanpellegrino as the
most active company in promoting Italy’s excellence worldwide. For more than a century, the S.Pellegrino brand has been an ambassador of refined Italian taste and style. S.Pellegrino has always been committed to promoting Italian excellence abroad, through various initiatives. The latest undertaking that contributed to the award is the Italian Talents project launched in 2010. With this project, S.Pellegrino develops partnerships with other world-class Italian brand names such as the collaboration with Bulgari on the occasion of the Jeweler’s 125th anniversary exhibition.

**AmeriCares Recognizes Nestlé Waters for Disaster Relief Effort**

AmeriCares, a nonprofit global health and disaster relief organization, honours Nestlé Waters North America for donating over one million bottles of water to natural disaster survivors in 12 US states, in 2011 alone. Over the last seven years, Nestlé Waters North America has donated over six million bottles of water to disaster survivors in the United States and Haiti. 2011 marked a year in which the United States was pummeled by some of the worst tornadoes, floods, and wildfires on record.

**December**

**Turkey: Erikli Joins the One-Billion-Litre Club**

Turkey’s leading water brand, Erikli, has sold over one billion litres, an outstanding performance that allowed Nestlé Waters’ Turkish brand to join the very selective Nestlé Waters’ “One-Billion-Litre Club”*. The tremendous success encountered by Erikli’s “Taste” campaign, in terms of media coverage throughout the year, has played a crucial role in this over remarkable sales achievement.

**Improving Road Safety in Sidi El Kebir, Algeria**

Nestlé Waters Algeria creates shared value by enhancing road safety, particularly for children, in the factory’s village, Sidi El Kebir. The company has worked with the local community to build a dedicated pedestrian path on the road that runs through the village, protect the school’s curb sides, build speed bumps to force vehicles – including delivery trucks – to drive slowly through the village.

*Members of the Nestlé Waters «One-Billion-Litre Club»:
Nestlé Pure Life (Global)
Poland Spring (United States)
Deer Park (United States)
Arrowhead (United States)
Al Manhal (Saudi Arabia)
AFGHANISTAN
Nestlé Pure Life

ALGERIA
Nestlé Vie Pure

ARGENTINA
Eco de los Andes
Glaciar
Nestlé Pureza Vital

AUSTRIA
Nestlé Aquarel

BAHRAIN
Al Manhal
Nestlé Pure Life

BELGIUM
Charmoise
Nestlé Aquarel
Valvert

BRAZIL
Nestlé Pureza Vital
Petrópolis
Santa Bárbara
São Lourenço

CANADA
Montclair
Nestlé Pure Life

CHILE
Cachantun**
Nestlé Pureza Vital
Porvenir**

CHINA
Dashan YunNan Spring
Deep Spring
Nestlé Pure Life
Waterman

CUBA
Ciego Montero
Los Portales
Nestlé Pureza Vital

EGYPT
Baraka
Nestlé Pure Life

FRANCE
Carola
Contrex*
Hépar
Nestlé Pure Life
Perrier*
Plancoët
Quézac
Saint-Lambert
Sainte-Alix
Vittel*

GERMANY
Frische Brise
Fürst Bismarck
Nestlé Aquarel
Nestlé Pure Life
Neuselters

GREECE
Aqua Spring
Korpi

HUNGARY
Nestlé Aquarel
Theodora

INDONESIA
Nestlé Pure Life

IRAN
Nestlé Pure Life

ITALY
Acqua Panna*
Levissima
Nestlé Vera
Pejo
Recoaro
S. Bernardo
S.Pellegrino*

JORDAN
Ghadeer
Nestlé Pure Life

LEBANON
Nestlé Pure Life
Sohat

LUXEMBOURG
Nestlé Aquarel

MEXICO
Gerber***
Nestlé Pureza Vital
Santa Maria

NETHERLANDS
Nestlé Aquarel

NIGERIA
Nestlé Pure Life

PAKISTAN
Nestlé Pure Life

PHILIPPINES
Nestlé Pure Life

POLAND
Dar Natury
Nańczowianka
Nestlé Aquarel

PORTUGAL
Nestlé Selda

RUSSIA
Nestlé Pure Life

SAUDI ARABIA
Al Manhal
Nestlé Pure Life
Springs

SOUTH AFRICA
Nestlé Pure Life

SOUTH KOREA
Nestlé Pure Life

SPAIN
Nestlé Aquarel
Viladrau

SWITZERLAND
Cristalp
Henniez
Nestlé Aquarel

THAILAND
Minéré
Nestlé Pure Life

TURKEY
Alaçam
Eriki
Nestlé Pure Life

UNITED ARAB EMIRATES
Nestlé Pure Life

UNITED KINGDOM
Buxton
Nestlé Pure Life

UNITED STATES
Arrowhead
Deer Park
Ice Mountain
Ozarka
Poland Spring
Zephyrhills

UZBEKISTAN
Nestlé Pure Life

VIETNAM
La Vie

* Distributed internationally
** The brand is owned by CCU, and bottled and distributed by the ‘CCU-Nestlé Aguas’ joint-venture company.
*** Gerber is a Nestlé global infant nutrition brand. The Gerber water range in Mexico is bottled and distributed by Water Partners Mexico under agreement with Nestlé Nutrition.