



*Our
Brand
Growth Strategy*



The Business Context

OUR CATEGORY

Nutritional Health is a huge and attractive category

- **Sizeable:** VMS + Sleep Aids combined is the biggest CHC Category - €126 Billion – 41% of Total CHC Market, with a 5% projected CAGR for the next 5 years.
- **Highly competitive & Fragmented:** the category holds a vast variety of competitors: from large players to small brands (low barriers to entry), from pure consumer health players to FMCG and from generalist brands to specialist ones. It translates into a high freshness index at 23% (+7pts vs. total CH).

→ To Win in VMS it is critical to own a space with a differentiated offering

OUR CHALLENGE & AMBITION

After an unsuccessful attempts at turning our energy brands into a VMS generalist, **we aim to bring them back into their core Energy space** where they have an opportunity to play on their strength (Energy is a key category attribute Berocca/Supradyn own vs competitors) as recently shown in IT performance (IT grew 34% in Q1 2025 as they refocused on the core Energy need).

Where we *PLAY*

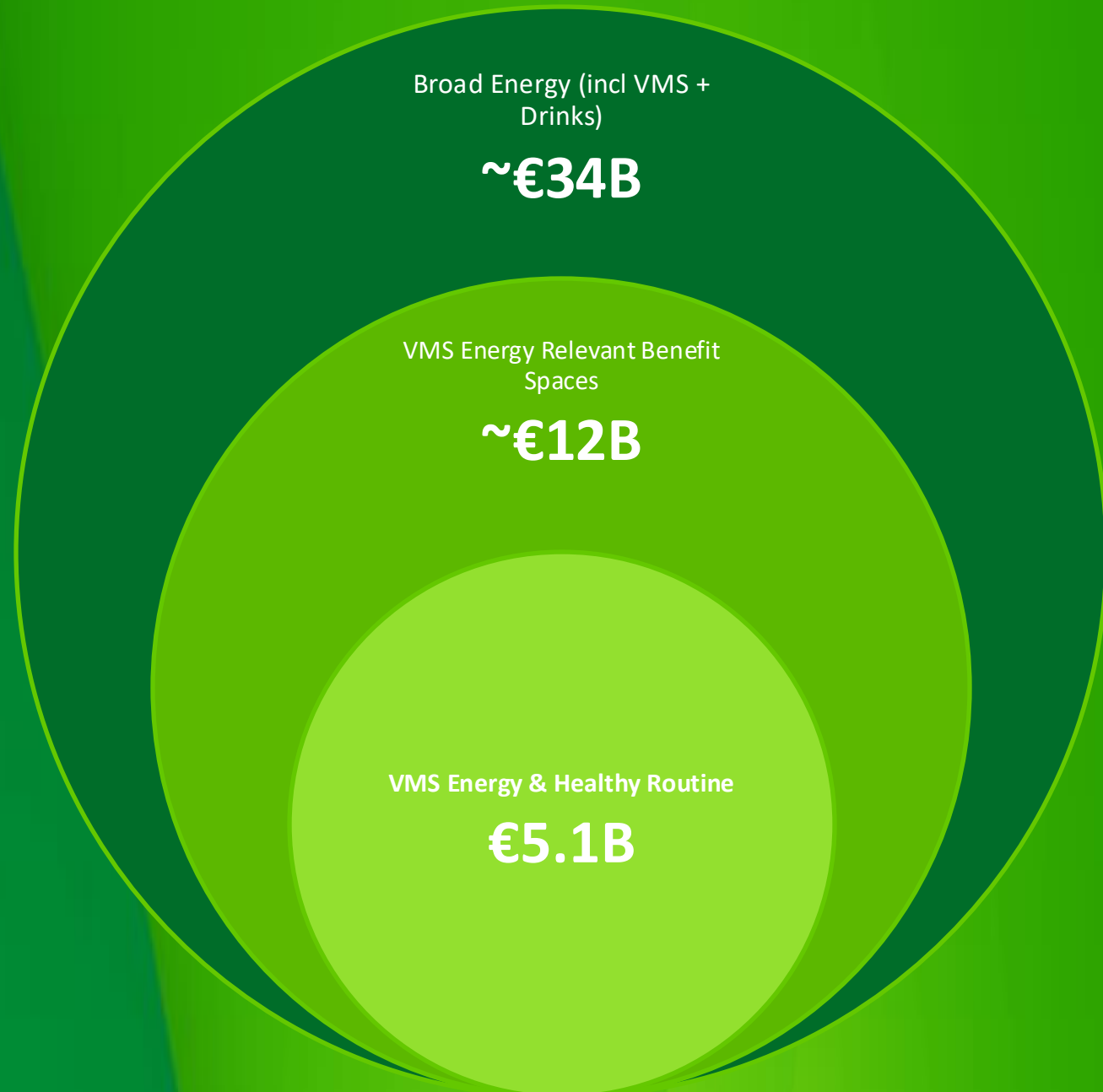
We play in Energy – including energy-relevant benefit spaces in other segments, a huge growth opportunity for us!

Today with Berocca & Supradyn we have Global sales of **€458 M in the Energy/Healthy Routine segment** out of a total global market of **€5.1B** (9% MS).

However, we estimate **the true Energy market within VMS to be ~€12B** – this includes 23% of Age Well (notably the 50+ SKUs), 1/3rd of Immunity recovery SKUs, & 22% of ILP which are **all used for their energy benefit**.

More importantly we see an even bigger market outside of VMS where Energy yielding drinks represent a **€22B markets** (Energy boost is the #1 claim in non-acholic drinks). This doesn't even include packaged food where Energy Boost is the #3 claim.

Reaching half of our fair share represents a gigantic opportunity of €1.5B globally.



Estimated Size of Energy Segment

Source: Market 360 (VMS) / Euromonitor (Drinks)

Berocca's Growth & Addressable Audience Strategy

GROWTH AUDIENCE	<p align="center">Energy Seekers</p> <p>Driven individuals who juggle work and family responsibilities, embrace new challenges and seek effective, trusted ways to stay mentally and physically energized every day or in specific moments.</p>							
SUB-SEGMENT DESCRIPTION	ACTIVE			NEW/LAPSED				
WHO THEY ARE	<p align="center">Berocca Users</p>	<p align="center">Competitor Energy VMS Users</p>	<p align="center">Energy Seeking Non VMS Energy Users</p>	<p align="center">Energy Substitute Category Users</p>				
JTBD	<p>Those who are using Berocca but might still have some unmet energy needs (i.e. Hydration).</p>	<p>Those who are using Energy VMS products other than Berocca (i.e. Bion 3).</p>	<p>Those who are using VMS for other energy needs (i.e. 50+) but not energy VMS products.</p>	<p>Those who are using non-VMS Energy products (i.e. Energy Drinks, Energy bars etc).</p>				
ADDRESSABLE AUDIENCE	<p>Make them aware that Berocca has energy offerings for all their life moments (Trade Across).</p>	<p>Convince them that Berocca has more clinical evidence & better PX than other VMS Energy products.</p>	<p>Show them that Berocca can better answer their diverse energy needs with our wide portfolio.</p>	<p>Make them aware of Berocca & convince them that it is a healthier energy solution.</p>				
	<p align="center">Working Parents</p>	<p align="center">Young Professionals</p>	<p align="center">Students</p>	<p align="center">50+</p>	<p align="center">Fitness Enthusiasts</p>	<p align="center">Gamers</p>	<p align="center">Frequent Travelers</p>	

Berocca's Growth & Addressable Audience Strategy

We are building an advanced segmentation to be able to better target our audience & answer their needs.



WHEN
THEY NEED ENERGY

ENERGY
MOMENTS

WHY
THEY NEED ENERGY

ENERGY
SPECIFIC NEEDS

WHAT
BEROCCA CAN OFFER

ENERGY
SOLUTION

An example of how it might come to life in a given market:

<i>WorkingParent</i>		<i>FamilyTime</i>		<i>SustainedEnergy</i>		<i>Berocca DailyEnergy</i>
<i>Gamer</i>	<i>x</i>	<i>PowerUp</i>	<i>x</i>	<i>Faster Reflexes</i>	<i>x</i>	<i>Berocca Boost Mind</i>
<i>Sports Enthusiast</i>		<i>Post-Workout</i>		<i>Recover Fast</i>		<i>Berocca Hydration</i>

OUR BRAND GROWTH STRATEGY

BRAND AMBITION

Become the world's **LEADING ENERGY EXPERT BRAND FOR THE MODERN GENERATION**, providing science-powered energy that feels good, fuels life, and ignites the best in people.

STRATEGIC TERRITORIES OF CHOICE

Demand Space: ENERGY (including Energy centric subsegment in other demand spaces like Age-Well, Immunity etc).

Geographic Presence: EMEA, APAC

Growth Audience: "Energy Seekers"- Driven individuals who juggle work and family responsibilities, embrace new challenges and seek effective, trusted ways to stay mentally and physically energized every day or in specific moments

BRAND DEVELOPMENT MODEL

STEP 1: BUILD BASE

Build base penetration across age groups & equity credentials as the Everyday Energy Brand

STEP 2: BUILD BREADTH

Unlock new Energy occasions (Boost & Recovery)

STEP 3: BUILD DEPTH

Expand Energy relevance to adjacent segments

STRATEGIC PRIORITIES

ENERGIZE

BRAND LOVE

Spark deep connections, fuel lifestyle relevance, and ignite desire.

- Create a **breakthrough brand platform and IMC** that brings the new Hive to life, and connects with energy seekers consistently
- Launch and implement a **fresh Visual Brand Language** across all touchpoints to create a consistent, vibrant, and energizing brand presence that brings our character to life and dials up our distinctive brand assets.
- Fuel **Berocca's buzz** with creator-driven influencer content and social activation that sparks connection and amplifies energy.

IGNITE ENERGY

SUPERIORITY

Establish Berocca as the undisputed global leader in science-backed energy

- Develop and maintain a **bold claims pipeline** across architecture with fit-for-purpose evidence.
- Create an **Energy Science Institute** to house in one place clinical research, expert insights, and real-world data — with the aim of elevating our claims and science story telling.
- Launch an **Energy Science education and advocacy program** transforming HCPs into passionate Berocca ambassadors

FUEL FULL ENERGY SPECTRUM PORTFOLIO

Strengthen the core and expand the portfolio across key energy needs

- **Secure a healthy core** with uplifting experience, strong claims and HCP endorsement while driving commercial innovations, new formats, flavors, and extensions to keep the brand fresh
- Build portfolio **breadth and depth** by expanding into Boost & Recharge, launching NPDs only in adjacent spaces with strong P&I support
- Selectively enter **ingredient led segment** with state-of-the-art formulation and next-gen science-backed ingredients

WIN AT EVERY CRITICAL ENERGY TOUCH POINT

Own energy through seamless omnichannel execution across CSJ

- **Win in Key Energy occasions** with right offering, pack size (smaller packs to drive trial, larger packs for trade-up), claims & promotions. **Explore new business models and channel opportunities** linked to key energy occasions
- **Prioritize channel success drivers:** In Pharma, HCP recommendations; In Retail, shelf visibility and demand generation; align P&I accordingly.
- **Ensure standout visibility** with compelling brand visibility, claims, and seamless shopper navigation both in-store and online.

BRAND DEVELOPMENT MODEL

	Path	Objective	Portfolio Expansion	KPIs
Step 1	BUILD BASE	Build base penetration across age groups & own “Energy” and “Health” attributes.	<pre> graph TD SE[Sustained Energy For Adults, Kids & Seniors] --- EB[Energy Boost For when you need immediate boost for peak performance] SE --- ER[Energy Recovery For when you need to recover energy post- sickness (Immunity) or physical strain (hydration)] ER --- EE[Energy Expert Catering to Ingredient- Led Consumers] </pre>	<i>Penetration</i> <i>Brand Power</i> <i>SoM</i> <i>Weighted</i> <i>Distribution</i>
Step 2	BUILD BREADTH	Unlock new usage occasions in relevant life moments.		<i>Awareness</i> <i>SoM</i> <i>Weighted</i> <i>Distribution</i> <i>Brand Stretch</i>
Step 3	BUILD DEPTH	Leverage Energy equity to recruit new consumer segments in adjacent Demand Spaces.		<i>Awareness</i> <i>SoM</i> <i>Weighted</i> <i>Distribution</i> <i>Brand Stretch</i>

Strategic Priorities



ENERGIZE BRAND LOVE

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