
Berocca®
MEGABRAND
FRAMES

This document provides a clear and practical overview of the Berocca Brand Frameworks — the guiding principles that shape our brand's identity and direction.

These frameworks define what makes Berocca meaningfully different in the marketplace, helping us deliver with consistency across every product, campaign, and experience.

By aligning on these principles, we ensure that each innovation and activation not only reflects our brand essence but also contributes to long-term, sustainable growth.

For the latest tools, updates, and brand materials, please refer to the Berocca Megabrand Digital Hub.

If you have any questions or need further guidance, your Berocca Megabrand Team is here to support you. Click the MENU to explore each chapter in detail.

CONTENTS

BEROCCA'S *HISTORY*

1969

Birth of BEROCCA

Launched **by Roche in Switzerland** as a Neurotropic vitamin for Nerves, with vit B complex, Vit C and minerals ***BE*** – BE as in B vitamin, ***ROC*** *as Roche,* ***CA*** *Calcium.*

1970s-1990s

Establishment of Brand Fame

- Berocca upgrades - addition of **Mg, Ca.**
- Repositioned against **Stress.**
- Brand Gains fame and momentum with memorable TV copies.

1990s-2000s

Re-Positioning for Performance

Berocca Performance launched with new formulation. Moved away from "Stress" and into "Performance" through Energy.

2000s-2010

Bayer Acquisition

- Berocca brand acquired by **Bayer.**
- Launch of Berocca **Boost.**

2010s onwards

Continued Leadership in Energy

Berocca is now **the leading Energy Supplement brand globally** driven, with iconic campaigns and modern innovations.

GLOBAL FOOTPRINT

More than 75 countries (60% in EMEA, 30% in APAC, 10% in LATAM)

Berocca

Our Brand Equity

BRAND HIVE

INSIGHT

"I handle my daily responsibilities well, but there's so much more I want to do.

When my energy runs low, it's the things that matter most that get left behind – and I end up settling for less than I know I am capable of."

BENEFIT POD

Berocca delivers
clinically proven energy for body & mind,
tailored to your life,
with an uplifting experience
so you can keep going and showing up at your best.

DISTINCTIVE ASSET

Bullet Bursting Energy

Berocca Green

The Berocca Product Experience

BRAND ESSENCE

ENERGY THAT *IGNITES* YOUR BEST

CHARACTER

BOLD
Lives with conviction. Leaps forward when others hold back.

DYNAMIC
Always moving. Always evolving. Always on.

MAGNETIC
Energizes every room. Draws others in with contagious energy.

CREDIBILITY

Pioneered energy through science for ***over 50 years***

The most clinically studied Energy brand – proven to work.

World's #1 energy supplement brand — trusted by experts, loved by millions

PURPOSE & IMPACT

We unlock human energy so no one has to settle for less than what they're capable of.

We do it with tailored energy support that helps them **handle the day-to-day tasks and still have the energy for what matters to them**

Brand Insight

The conflict in people's lives that we are trying to resolve, what they need us for.

When our energy's not firing, it's not just our body that feels it - life does, too.

That drag *that keeps us from the things that matter most – the passions, the connections, the dreams.*

That fog *that steals our spark when we want to lean into what lights us up.*

That flat feeling *that has us letting the meaningful stuff slide when we know we could do both*

And when that happens? We're not living at our best. We're settling for just getting by, when ***we know we're meant for more.***

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Brand Benefit POD

The higher order value we deliver to consumers, what we can help them feel and do.

Not all energy is created equal. Some give you a quick hit, some leave you wired.

Berocca is different. It's **clinically proven** to fuel both body ***and*** mind - helping people feel fully switched on, not just hyped up.

We offer **energy that fits your life** - whether you need to sustain all day long, boost, or recharge.

Best of all? It's **an uplifting experience** that you love - lifting you up without the crash, so you can move through life brighter, sharper, and ready for more.

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Brand Essence

What the brand stands for:
the soul of the brand, capturing the unique role we play in people's lives

Our essence is **simple yet powerful**: to give you the **Energy that ignites your best**.

That's what Berocca is here for. Not just to fuel the body. Not just to sharpen the mind. But to **spark the best version of yourself -** focused, alive, and ready to own every moment

"Ignites your best" speaks not only to our clinically proven blends of vitamins and minerals that fuel both body and mind, but also to the experience Berocca delivers – **energy that feels good, helping people feel sharper, more alive, and ready to show up at their best.**

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Brand Credibility

The most compelling reasons to believe the authenticity of the brand

We've been here from the beginning, **pioneering clinically proven energy** for body and mind - not just since energy became a buzzword, but for 50 years, when we saw what people really needed.

Today, we're not just another energy brand making claims. We're the **most clinically studied energy supplement in the world**, with decades of research proving what millions already feel - this energy is different.

That's why we've earned our place as **the #1 energy supplement globally.** Not through hype, but through helping people ignite their best.

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Brand Purpose & Impact

The positive changes we want to create for consumers and the world

We believe that when people are full of energy, they show up differently - more alive, more present, more engaged with life.

But between hectic work, demanding family life, world news, economic pressures... Life has a way of draining all our energy.

That's why we're creating the concrete tools to **keep track of the world's most important energy supply: Human Energy - and provide tailored support** so people can handle their day-to-day and still have energy for what lights them up, so no one has to settle.

As energy experts, we're here to turn the power on! We don't just sell energy supplements, **we define Human Energy, we measure it, we unlock it.**

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Brand Character

The personality and tone the consumer expects us to bring to life and use when talking to them

What our personality is like:

We are bold — we speak with conviction and spark confidence. We inspire people to lean in and live full-on.
We are dynamic — always moving, evolving, switched on. We match life's pace with energy and agility.
We are magnetic — we energize every moment, drawing people in with contagious positivity.

What our tone of voice is like:

We speak authentically — real, honest, and human.
We sound energetic — alive and switched on.
We radiate joy — bringing brightness and optimism that's impossible to ignore.

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Distinctive Asset

The learned visual codes that help consumers instantly recognize and recall the brand

The Bullet icon is our most distinctive visual asset - capturing the energy that Berocca brings to life. Across all touchpoints, it signals the spark, the switch-on moment, the activation that sets us apart.

Our **vibrant green reinforces this energy story** - bold, alive, and instantly recognizable. It's the color of vitality that cuts through shelf clutter.

And our product experience brings it all to life: the fizz of our effervescent tablets creates a multi-sensory moment - activating sight, sound and taste – supported by our robust science. **It makes taking Berocca an energizing experience before you even feel the benefit.**

By building on these assets consistently - the icon, the color, the fizz - **we create an instant, visceral cue that this is energy designed to ignite your best.**

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BAYER
Berocca®
BRAND WORLD

Berocca

DESIGN IDEA

UNLOCKING ENERGY

Berocca is the catalyst for unlocking your sharpest, most dynamic self.
We channel bold, magnetic energy into every experience to help you seize every moment.
Our brand world empowers you to rise to every occasion, igniting your best so you can unlock your full potential and thrive, every day.

Berocca

DESIGN IDEA

UNLOCKING ENERGY

DESIGN PRINCIPLES

Dynamic Motion

Our Brand World is fueled by a dynamic, vibrant flow of energy, that ignites your best.

Sparking Positivity

We create a brand world fully charged with joyful energy, inviting you into an upbeat and inspiring experience at every touchpoint.

Science you can Feel

At Berocca, we specialize in energy you can feel good about. Every sip is more than uplifting: it's a simple, enjoyable step towards unlocking your full potential. Backed by robust science you can trust.

Berocca

DESIGN PRINCIPLES

DYNAMIC MOTION

Our Brand World is fueled by a dynamic, vibrant flow of energy, that ignites your best.

Always moving, always evolving, this momentum pulses through every element. Bringing bold movement and an energetic drive that enables you to seize each moment and make the most of every opportunity.

This energy is both immediate and enduring: it bursts forth with impact, representing the ever-present force that empowers you to live fully.

Berocca

DESIGN PRINCIPLES

SPARKING POSITIVITY

We create a brand world fully charged with joyful energy, inviting you into an upbeat and inspiring experience at every touchpoint.

Through vibrant visuals and immersive storytelling, we capture authentic moments of positivity and possibility, with every touchpoint reflecting the burst of vitality that Berocca delivers. This invigorating spark inspires you to live boldly and embrace your best self.

Berocca

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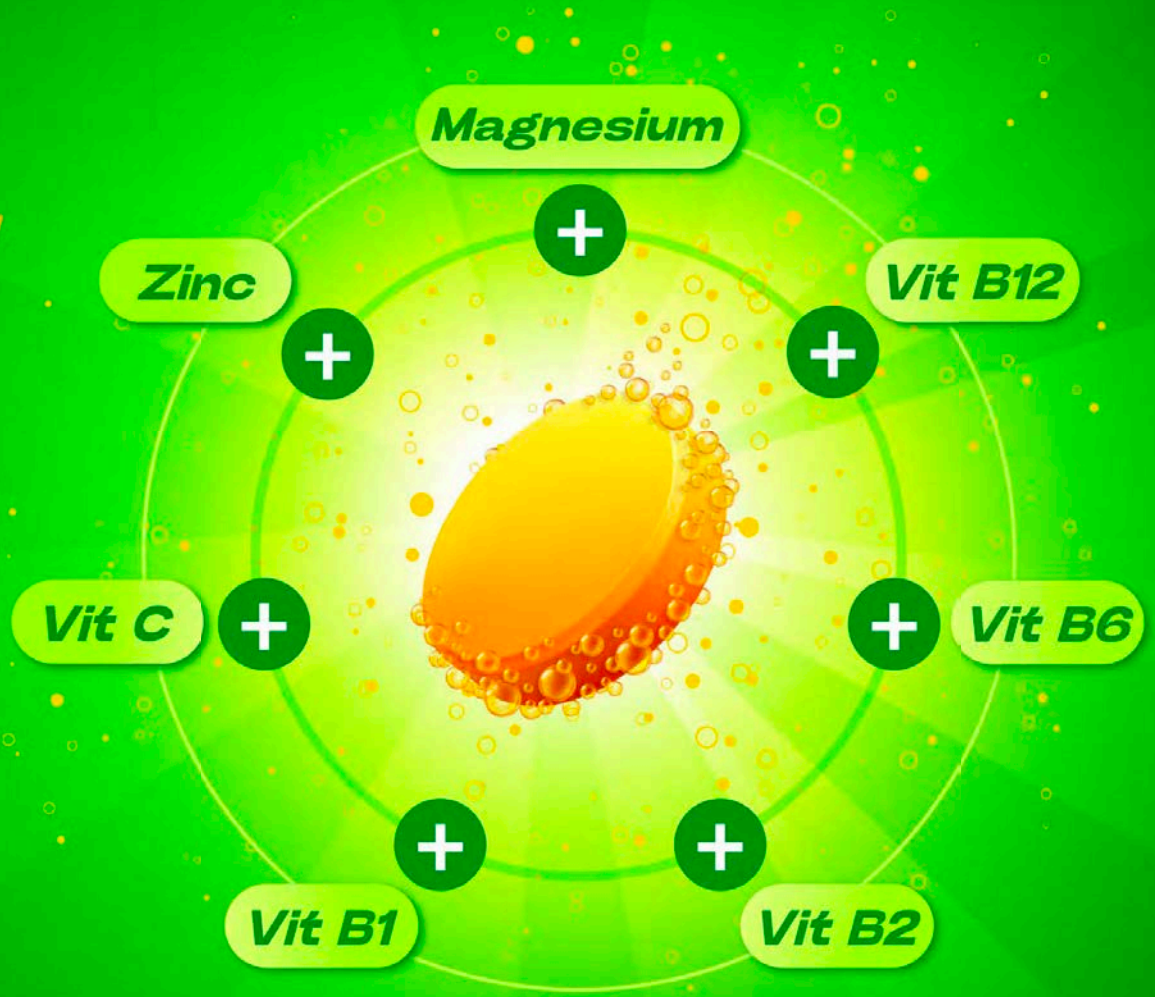
SCIENCE you can FEEL

At Berocca, we specialize in energy you can feel good about. Every sip is more than uplifting: it's a simple, enjoyable step towards unlocking your full potential. Backed by robust science you can trust.

Our signature fizz delivers a refreshing burst of vitality that wakes up your senses, through a healthier take on energy that ignites your best. A multisensory journey, grounded in proven efficacy.

When it comes to our science, there is no overstatement or clutter. Just proven science, that's HCP recommended. Empowering consumers with the confidence that they can always trust our products to best meet their needs.

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DISTINCTIVE BRAND ASSETS

Berocca

DISTINCTIVE BRAND ASSETS

BEROCCA BULLET

Ignited by a powerful spark, the Berocca bullet represents the dynamic and ever-present force that unlocks life's possibilities. Boldly enlarged and cleanly cropped throughout our brand world, the bullet, a direct echo of our on-pack icon, delivers clarity, energy and unmistakable impact across every touchpoint.

Berocca Bullet

Primary graphic bullet

Secondary bullet created with the fizz effect

Berocca

DISTINCTIVE BRAND ASSETS

BEROCCA GREEN

WITH A SPARK OF ORANGE

Our vibrant green is the spirit of the Berocca brand: bold, alive and instantly recognizable. This energetic hue reinforces our story of vitality, cutting through shelf clutter with confidence and clarity. It's more than just a color, it's the unmistakable signal of Berocca's power to refresh and energize every day. A spark of orange always elevates the green, in addition the intense presence of white enhances the energy and contrast throughout the brand world.

Berocca

DISTINCTIVE BRAND ASSETS

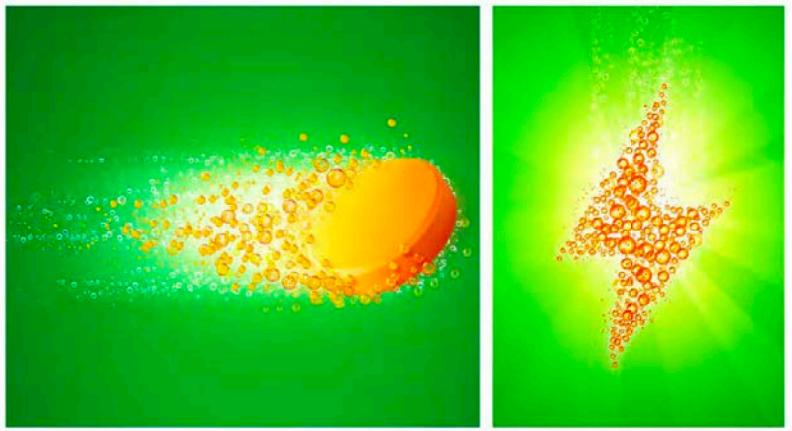
PRODUCT EXPERIENCE

The Berocca experience is a multisensory celebration, where fizz, flavour and ritual come together in a moment of transformation. From the lively effervescence to the crisp and invigorating taste, every detail embodies our bullet-bursting energy. It's not just about the benefits you feel later; it's about the energizing experience you enjoy from the very first sip.

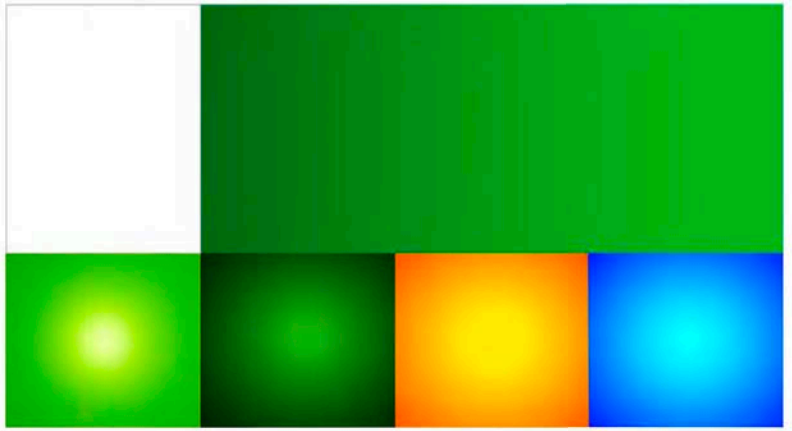
Berocca Key Assets

BRANDMARK AND BURST

PRODUCT EXPERIENCE

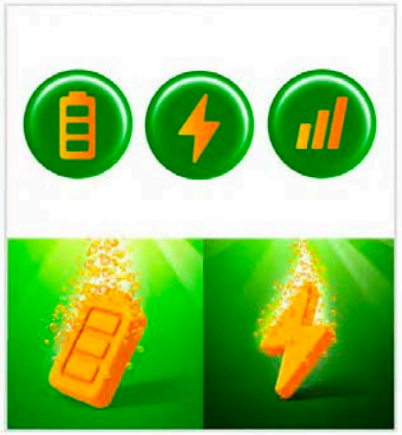


COLOUR PALETTE

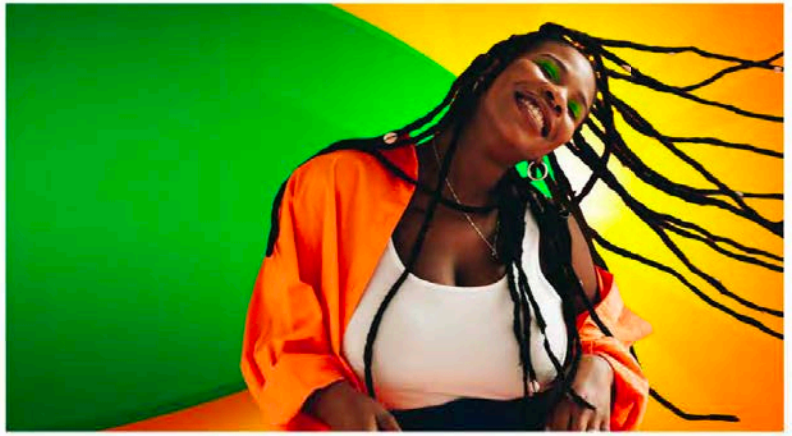


PRODUCTS

ICONOGRAPHY



PHOTOGRAPHY



TYPOGRAPHY

Photography

People

Our people are unstoppable enthusiasts who enjoy getting the most out of every single day of their multi-faceted lives. They approach everything with positivity, a sense of humour and a 'can do attitude. They love to be absorbed in what they do. They are students, parents, travellers, sport enthusiasts and professionals within the workplace. Subjects are shown to be 'caught in a moment and expressive through facial and body expressions. They are real and authentic – people of all ages, body types, ability, ethnicity and culture.

Photography style

The photography style and lighting reflects the energy of people – bold, bright and colourful. All subjects must be sharp in focus.

Active / Sports Enthusiast

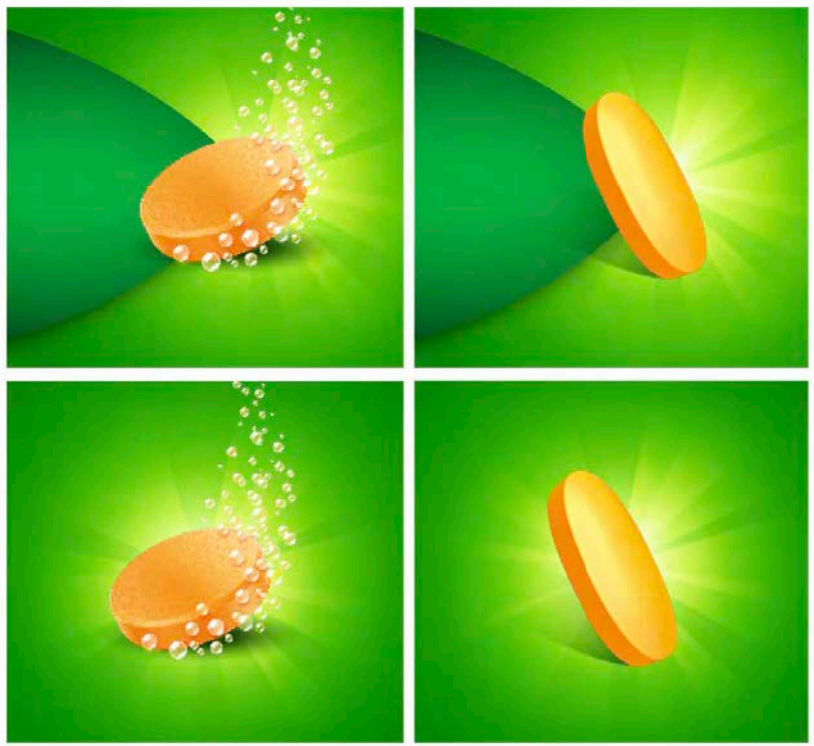
Parents

Students

Professionals

Travellers

Product Visuals Principles



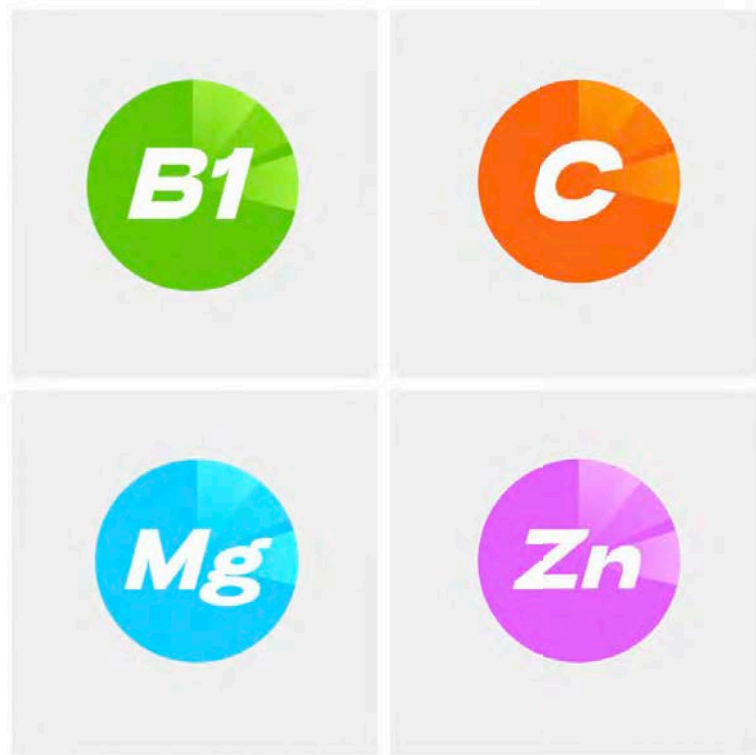
Interaction with and without Berocca Bullet

Flavour Variants

Berocca Iconography

Pillar Iconography

Features and Benefit Iconography



Ingredient Iconography

Berocca

Typography

BOLD with Berocca CHARACTER

Typeface: Power Grotesk

Products character designs that aligns with the Berocca language

Bold, italic weights showing movement and power


Berocca
ENERGY RECOVERY
HYDRATE
Helps restore Electrolytes balance to optimize Hydration and refuel your Energy levels
Mango-Passionfruit natural Flavour
Electrolytes + B1, B6, B9, B12 Vitamins + Minerals
Effervescent tablets Food supplement | 20
Berocca
ENERGY RECOVERY
IMMUNE SUPPORT
Re-vitalizes Energy levels, and Immune support
Natural orange flavour
11 Essential Vitamins & Minerals including Vitamin C & Zinc
Effervescent tablets | Sugar free | 30
Berocca
EXPERT
vitD
VITAMIN D3, Vitamin K & Calcium
3in1
30 Tablets/Tablette
Berocca
DAILY ENERGY
Clinically proven to support & sustain physical and mental energy
Natural orange flavour
12 essential vitamins & minerals
Effervescent tablets | Sugar free | 30
Berocca
ENERGY BOOST
for MENTAL PERFORMANCE
Fast boost of Mental alertness, Memory & focus
Natural orange flavour
12 essential vitamins & minerals with Spanish Sage Extract
Effervescent tablets | Sugar free | 30
Berocca
EXPERT
Mg
MAGNESIUM
5 salts in 1
5in1
60 Capsules / Kapseln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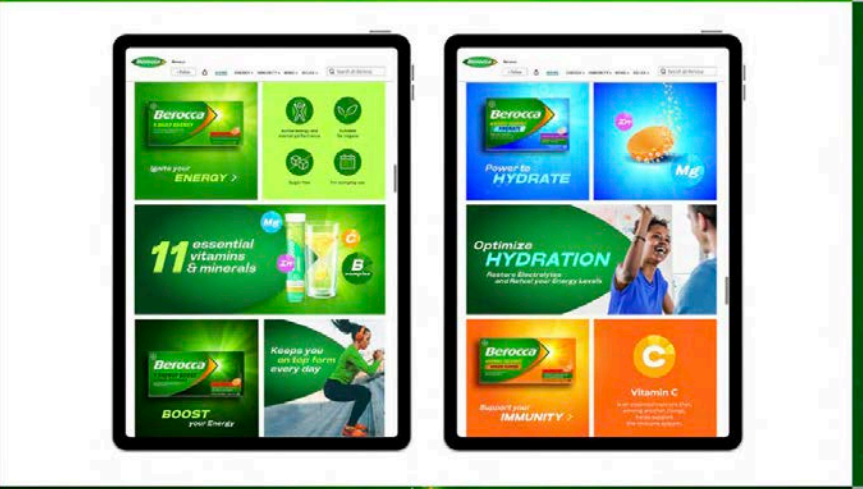

11 essential vitamins & minerals
Keeps you on top form every day
BOOST your Energy
Power to HYDRATE
Optimize HYDRATION
Vitamin C
IMMUNITY


Berocca


Berocca
YOUR DAILY ENERGY


Berocca
BOOST YOUR ENERGY


Berocca
ENERGY RECOVERY
HYDRATE
Power to HYDRATE
Restore Electrolytes and Refuel Energy levels
Berocca
ENERGY BOOST
Boost your ENERGY
Fast Boost of Physical & Mental Energy

Berocca

Our Brand Science

ENERGY is a fundamental need to life

At cellular level, energy is required for metabolism, which includes the conversion of nutrients into usable forms of energy (ATP - adenosine triphosphate, the energy currency of our cells).

This energy powers all biological processes essential for survival and functioning such as:

Physical Performance

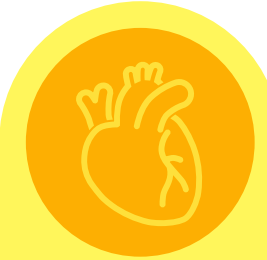
Energy fuels muscle contraction and physical activity, enabling movement and coordination.

Mental Performance

Energy powers the brain, which consumes a significant portion of the body's energy, enabling cognitive functions such as thinking, memory, and emotional regulation.

Growth & Repair

Energy drives the synthesis of new cellular components, cells and tissues, crucial for growth, healing, and maintenance of bodily functions.



Vital Processes

Energy supports physiological functions necessary for maintaining life, including respiration, digestion, circulation.

Energy is not merely fuel;
It enables every physiological process that sustains human existence

Berocca

Our Brand Science Principles

For over 50 years, Berocca has been bringing energy to consumers to ignite their best, with efficacy at heart. Our Brand Science Principles inform what we do, from product development to science communication.

01

We *LEAD* the science of *Energy*

Since their creation, our Energy brands have pioneered the science of Energy. We understand Energy like no other as the most researched energy supplements. We will continue delivering scientifically and clinically validated solutions.

02

We *MASTER* every *Energy* need

From everyday focus to peak performance, we decode energy moments and **deliver precision-tailored solutions**.

Our products are developed based on deep medical insights and are specifically designed to **address the diverse energy needs** of our consumers, throughout their life stages & with their unique daily needs in mind.

03

We Make *Energy TANGIBLE*

Our energy is not just felt, it is **measurable**, **clinically substantiated**, and **claimable**.

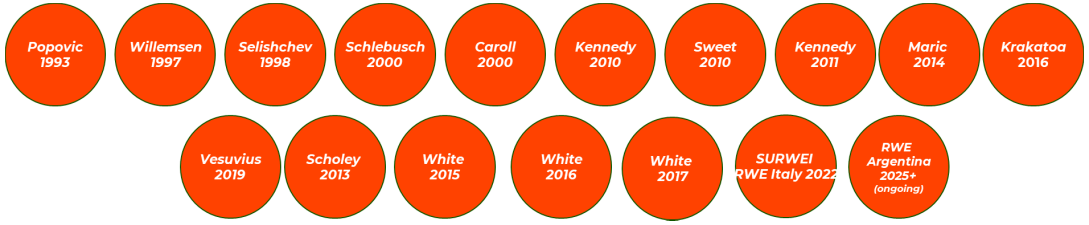
We engage with consumers & HCP to **communicate** and **educate** on our Science, making this our key differentiator to competitors.

01 We *LEAD* the science of *Energy*

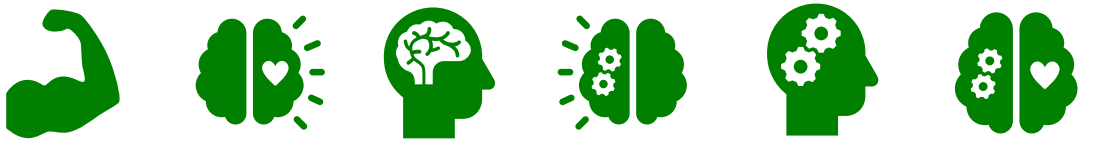
Since their creation, our Energy brands have pioneered the science of Energy. We understand Energy like no other as the most researched energy supplements. We remain committed to delivering scientifically and clinically validated solutions.

Our products are proven to provide energy igniting your best

We have over 15 studies across our energy brands, more than any of our competitors



Showing improved performance and well-being



Enhanced physical stamina ***Improved mood*** ***Enhanced mental performance and stamina*** ***Improved memory*** ***Better concentration*** ***Reduced stress and anxiety***

We are founding an Energy Science Institute as the authority on energy

The institute will represent our expertise and dedication for quality and innovation in the Energy space.

By collaborating with internal experts (Medical, R&D, Product Experience, Consumer), KOLs, and leading academics, we will advance Energy science and establish ourselves as trusted experts who drive recommendations.

How we will continue to lead:

- Invest in evidence generation
- Strengthen claim substantiation to secure global credibility and differentiation

02 We *MASTER* every *Energy* needs

From everyday focus to peak performance, we decode energy moments and deliver precision-tailored solutions. Our products are developed based on deep medical insights and are designed to address the diverse energy needs of our consumers, throughout their life stages & with their daily needs in mind.

We understand that not everyone has the same energy needs

We define Energy needs using two key factors: first, your lifestage, and second, your context (shaped by physiological and environmental conditions).

	Children 6-12 Years old	Adolescents 12-19 Years Old	Young Adults 20-39 Years Old	Middle-Aged Adults 40-60 Years Old	Seniors > 60 Years Old
Mindset	**Learning & Achievement** *focuses on learning academically and emotionally, while developing interests and hobbies.*	**Identity and Exploration** *includes learning academically, seeking independence, while grappling with peer pressure and self-image.*	**Ambition & Self-Discovery** *revolves around ambition, exploration of life paths, and establishing a sense of purpose.*	**Responsibility & Stability** *adopts a mindset focused on stability, family responsibilities, and career advancement.*	**Reflections & Legacy** *include acceptance of aging, sharing wisdom, and focusing on relationships and health.*
Types of Energy-Needs: Daily	**Developmental** fatigue from balancing schoolwork, social activities, play, and need for emotional regulation.	**Growth** fatigue due to academic pressures, social dynamics, and hormonal changes.	**Responsibility** Persistent fatigue due to the everyday pressures of career/school, family responsibilities, and caregiving (for kids and parents). Often aggravated by mid-life crisis.		**Aging-Related** fatigue due to factors like adjustments to retirement lifestyle, medications, changes in sleep patterns, and menopause for women.
Types of Energy-Needs: Contextual			**Lifestyle** fatigue from a busy and high-stress lifestyle choices related to work, personal hobbies, and social life.		
			External Factors fatigue due to acute health conditions like temporary sickness (e.g. flu) or dehydration from physical activities/season.		
	Insufficiency/Deficiency & Individual Needs fatigue due to gap in a specific nutrient intake				

This enables the creation of a rich portfolio, to address consumer needs

Across life stages

And contexts

Kids ***Adults*** ***50+*** ***Boost*** ***Recovery - Hydration*** ***Recovery - Immunity***

We aim to further deepen our Energy solutions

Supported by new research, we are building a framework that will transform the way we communicate and innovate.

Audience	×	Energy Need	×	Ingredient
'Gamers'	×	Reaction Times	×	tbc
'Working Parents'	×	Decision Fatigue	×	tbc

➔ ***Deployment planned in Late Q4 2025***

03 We make *Energy* TANGIBLE

Our energy is not just felt, it is measurable, clinically substantiated, and claimable.
We engage with consumers & HCP to communicate and educate on our Science, making this our key differentiator to competitors.

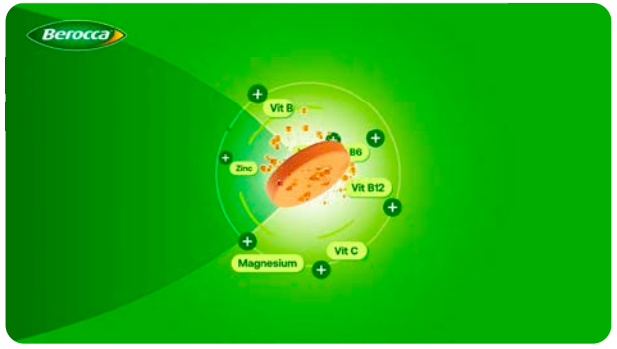
Science Communication as our POD

With more access to information, **consumers are more knowledgeable** and demand **proof of product efficacy** which is a key purchase driver for Energy supplements.

We have a huge opportunity to **build on our brand heritage & our rich clinical background to bring science to consumers & HCP**, creating brand preference.

We communicate about our science by:

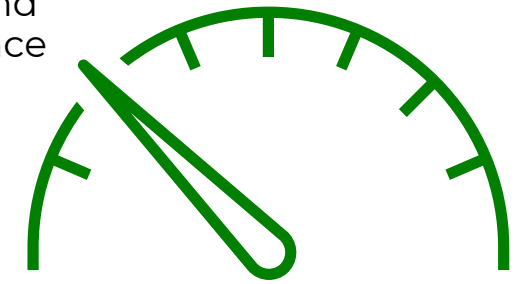
- Building Toolkits about our core science & NPDs.
- Developing new consumer attractive claims like the 7 in 1.
- Enhancing MOA.



Creating the Energy & Vitality Quotient (EVQ)

We are creating a proprietary psychometrically validated tool to measure and 'diagnose' energy needs, giving us thought leadership.

- Consumer-friendly.
- Clinical and Research-grade: used by HCPs and KOLs in clinical and research settings to drive science reputation.



PRODUCT PRINCIPLES

Frames all products in the brand portfolio to deliver ‘Energy that ignites your best’ and build equity while maintaining credibility.

Why is this important?

When we stray outside of equity, we observe (1) reduced support from customers (sales, trade, pharmacists); (2) lack of consumer credibility for the product; (3) lower sales performance

WHAT’S IN:

THE SCIENCE

- Formulas with proven mechanism for energy production and/or metabolism that halo back to the energy promise.
- Proven = clinically demonstrated or through established and substantiated mode of action.

THE EXPERIENCE

- Consumer experience that builds on the effervescent heritage and supports distinctive ‘bullet bursting energy’ of our brand.
- Supporting formats, flavors and packaging solutions.

THE PERFORMANCE

- Meets specific, measurable benefit criteria for each brand pillar (below)

WHAT’S OUT:

EQUITY DILUTION

If it doesn't energize, enhance, or restore energy in a measurable way that consumers can experience, it's not Berocca.

- Sub-premium positioning that undermines science heritage or energy connection (e.g., Heart Health; Skin Rejuvenation)
- Medical condition focus shifting from energy to treatment messaging

INGREDIENT RED FLAGS

- Unsubstantiated novel ingredients without proven energy mechanisms.
- Unmeasurable claims consumers cannot validate through experience.
- Excessive artificial additives beyond clean-label standards.
- Ingredients/combinations flagged on the Material Stewardship List (MSL).

1 SUSTAINED ENERGY

The nutrients your body needs every day to sustain and support energy

- Sustained benefit lasting minimum 6-8 hours without crash.
- Consistent daily energy levels when used as part of routine.

2 ENERGY BOOST

Fast-acting energy boost you can feel

- Noticeable energy increase or peak effect within 30 min
- Enhanced physical or mental performance for 2-4 hours.
- Clear onset sensation that consumers can identify.

3 ENERGY RECOVERY

Replenishes the nutrients your body needs to return you to your energy baseline

- Measurable improvement in recovery markers (hydration, immune function, muscle recovery).
- Improve time to "feeling normal again" (vs no intervention).

4 ENERGY EXPERT

Expert ingredients that support energy production and metabolism

- Addresses specific energy-related deficiencies OR measurable improvement in biomarkers.
- Consumer understands "why this ingredient works for me“.

Berocca

Our Sustainability Principles

Our Champion & Defend Areas

In a world that celebrates hustle without well-being, we champion energy that ignites your best - and make living fully your norm, not the exception. Our mission?

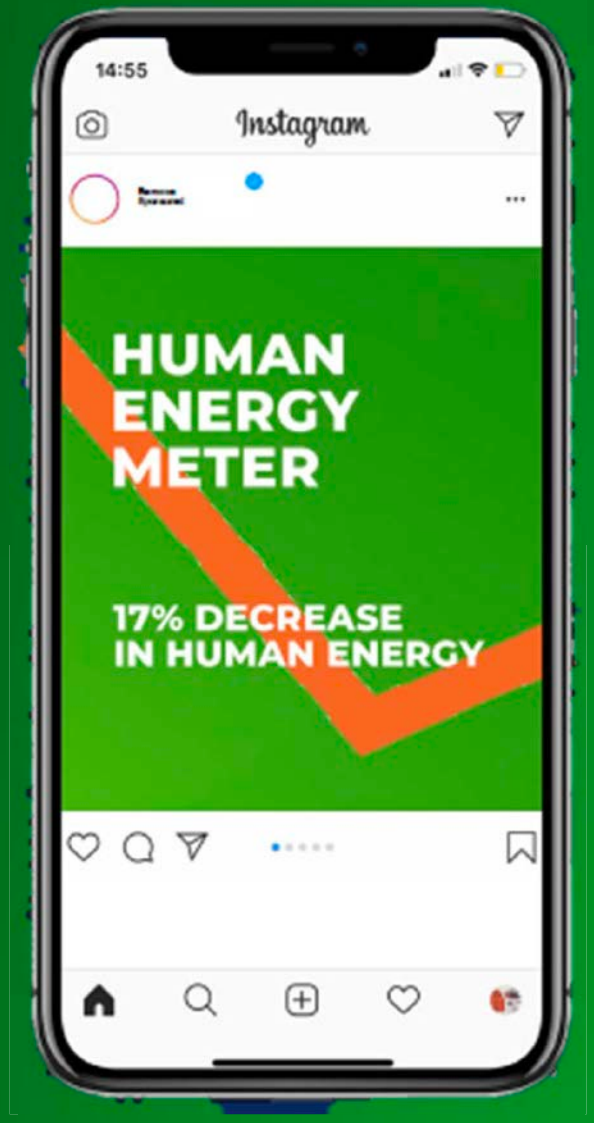
To unlock human energy so everyone can live their life fully.

We champion human energy by educating around Energy - measuring how energized (or drained) nations are - driving the conversation to reveal hidden truths and sharing the positive sources of energy.

More so, we will continue to work on mitigating our environmental impact through our defend areas.

CHAMPION AREA	DEFEND AREA
Unlocking Human Energy By educating, driving the conversation and sharing the positive sources of energy.	**Sustainable Packaging** **Clean Label** **Reducing Carbon**

Champion Unlocking Human Energy



We will keep track of the world's most important energy supply: Human Energy!

And provide more when we need it most.

Hectic work, demanding family life, world news, economical outlooks... Life has a way of draining all our energy.

But Berocca as a true energy expert brand is here to turn the power on! **We don't just sell Energy, we define it, we measure it.**

By making energy tangible, we will empower consumers to get their energy supply up.

Champion Unlocking Human Energy

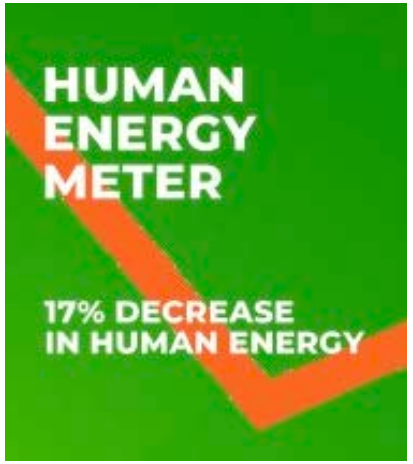
We can bring our purpose to life with 3 actions

OFFERING PRODUCTS & SERVICES

We will offer product igniting both mental and physical energy

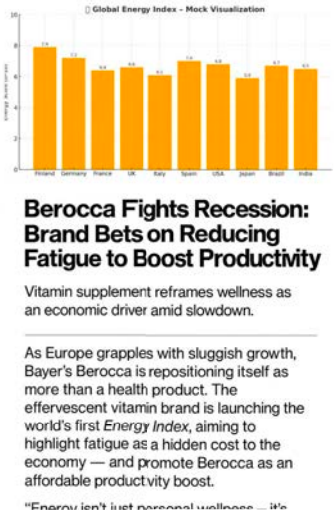
MEASURING TO OWN

We will build our own human Energy Meter to reveal how energized (or drained) nations are.



DRIVING THE CONVERSATION

We will create a recurrent conversation exposing local energy drainers and cultural truths about energy.



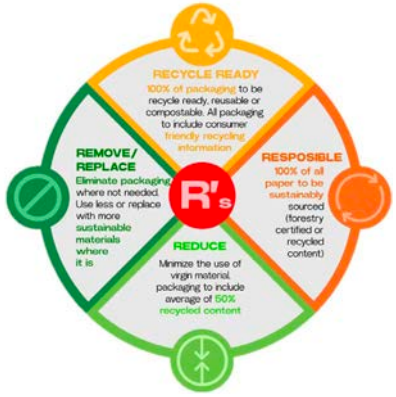
Defend Catalyst of 3 Key Areas

SUSTAINABLE PACKAGING

Given Berocca's diverse packaging portfolio, it is essential to evolve packaging materials by reducing excessive materials & sizes and increase recyclability.

Berocca will embark on a path ***to evolve in recyclability*** to:

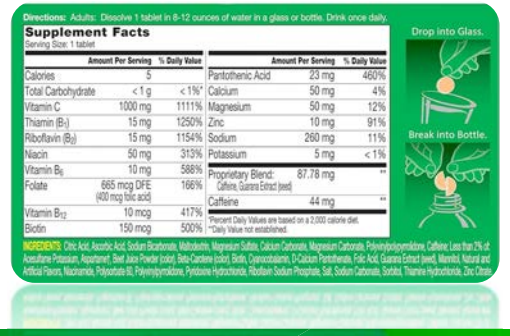
1 Reduce plastic usage in rigid tubes.
2 Reduce paper materia*l*, where elimination is not on the table.
3 Increase overall blister recyclability while eliminating usage of PVC.



CLEAN LABEL

It is crucial for Berocca to ***ensure that our portfolio adhere to clean label standards.***

Our approach will involve:
1 Ensuring Ingredient Transparency for Consumers: Conduct a comprehensive formulation assessment of the entire supply chain, addressing potential usage of additives, colorants and areas of improvement.
2 Standardizing Process*:* Work closely with our Product Development team to create a consistent plan for future product formulations in new nutritional areas.



REDUCING CARBON

Berocca is committed to reducing and, where reduction isn't feasible, compensating for carbon emissions in manufacturing and operations*.*

For this, we will:
- Ensure GHG Reduction in Line with BCH Scope 3: Conduct a comprehensive assessment of greenhouse gas (GHG) emissions throughout the entire supply chain, pinpointing emission hotspots and areas for improvement.

Berocca

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*

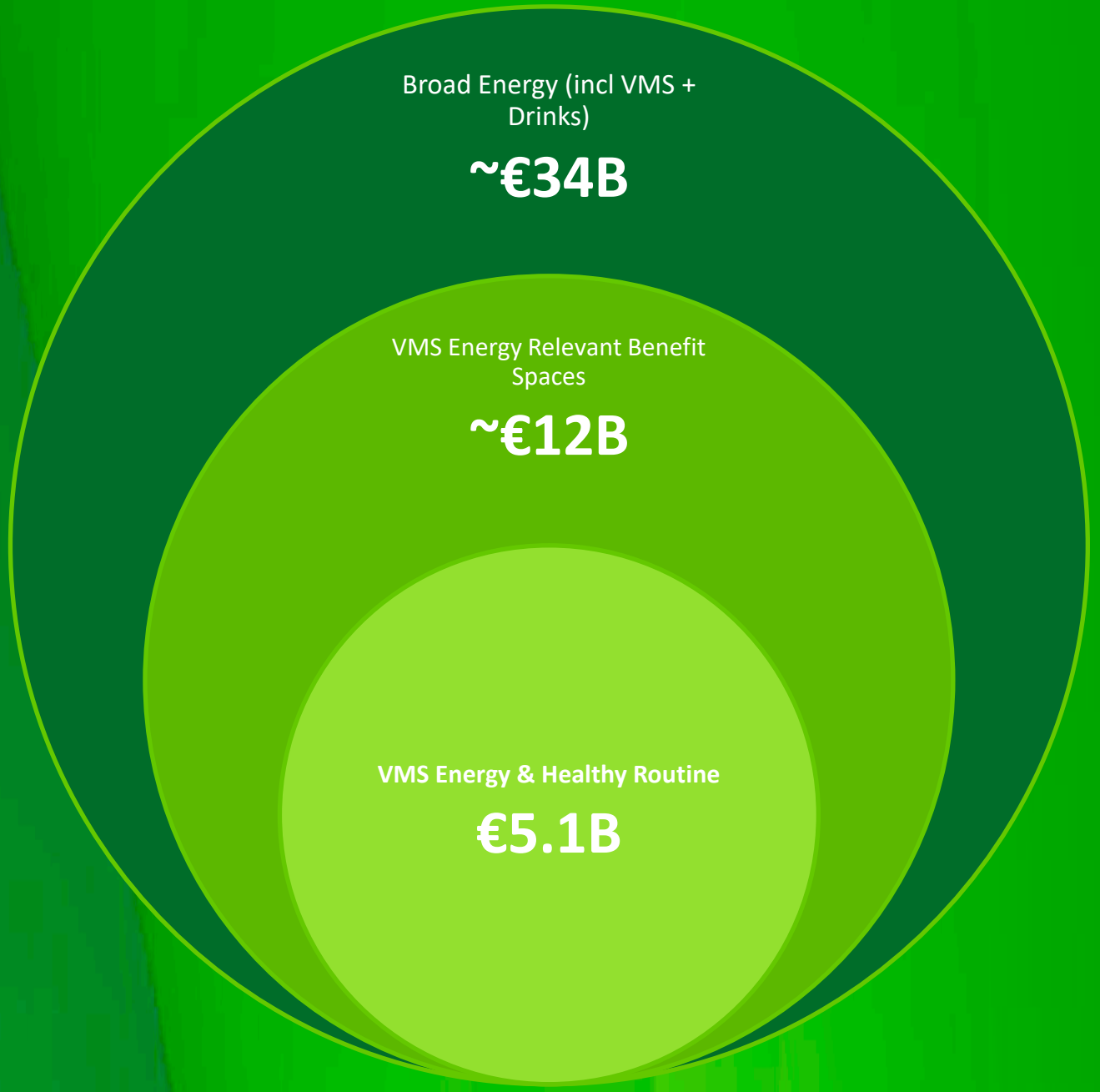
We play in Energy – including energy-relevant benefit spaces in other segments, a huge growth opportunity for us!

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	**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.			
	ACTIVE		**NEW/LAPSED**	
SUB-SEGMENT DESCRIPTION	***Berocca Users***	***Competitor Energy VMS Users***	***Energy Seeking Non VMS Energy Users***	***Energy Subsittute Category Users***
WHO THEY ARE	Those who are using Berocca but might still have some unmet energy needs (i.e. Hydration).	Those who are using Energy VMS products other than Berocca (i.e. Bion 3).	Those who are using VMS for other energy needs (i.e. 50+) but not energy VMS products.	Those who are using non-VMS Energy products (i.e. Energy Drinks, Energy bars etc).
JTBD	Make them aware that Berocca has energy offerings for all their life moments (Trade Across).	Convince them that Berocca has more clinical evidence & better PX than other VMS Energy products.	Show them that Berocca can better answer their diverse energy needs with our wide portfolio.	Make them aware of Berocca & convince them that it is a healthier energy solution.
ADDRESSABLE AUDIENCE	***Working Parents***	***Young Professionals***	***Students***	***50+***	***Fitness Enthusiasts***	***Gamers***	***Frequent Travelers***

Berocca's Growth & Addressable Audience Strategy

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

WHO
NEEDS ENERGY

ENERGY
AUDIENCES

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:

Working Parent		*Family Time*		*Sustained Energy*		*Berocca Daily Energy*
Gamer	*x*	*Power Up*	*x*	*Faster Reflexes*	*x*	*Berocca Boost Mind*
Sports Enthusiast		*Post-Workout*		*Recover Fast*		*Berocca Hydration*

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.	**Sustained Energy** *For Adults, Kids & Seniors*	*Penetration* *Brand Power* *SoM* *Weighted Distribution*
Step 2	**BUILD BREADTH**	Unlock new usage occasions in relevant life moments.	**Energy Boost** *For when you need immediate boost for peak performance* **Energy Recovery** *For when you need to recover energy post-sickness (Immunity) or physical strain (hydration)*	*Awareness* *SoM* *Weighted Distribution* *Brand Stretch*
Step 3	**BUILD DEPTH**	Leverage Energy equity to recruit new consumer segments in adjacent Demand Spaces.	**Energy Expert** *Catering to Ingredient-Led Consumers*	*Awareness* *SoM* *Weighted Distribution* *Brand Stretch*

Strategic Priorities

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Berocca

Our Brand Architecture

Strategic Considerations

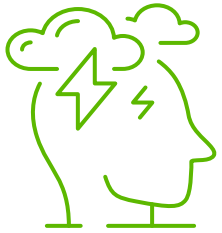
BUILT ON CONSUMER NEEDS

Across various life-stages and occasions, consumers need different energy requirements to overcome various types of fatigue.

CENTERED AROUND ENERGY

Future product innovations should build on core Energy proposition. We should mitigate proliferation of NPD launches that do not build our core equity.

DEEPER PORTFOLIO



To become a true Energy Expert, we need to deepen our portfolio to address their needs holistically and allow sufficient runway for brand growth and expansion.

SUPERIOR EXPERIENCE

Table-stake attributes are critical in this category i.e. format preference, packaging convenience, and flavors/taste. They are important elements of our Brand Heritage, and they impact Brand Power.

Different ENERGY needs based on lifestages & occasions

As part of living our lives, each one of us deal with different mindset for each life goals. In our quest to achieve our life goals, we have two main energy needs – one that is linked to life stage and one that is contextual (driven by physiological / environmental conditions).

	Children 6-12 Years old	Adolescents 12-19 Years Old	Young Adults 20-39 Years Old	Middle-Aged Adults 40-60 Years Old	Seniors > 60 Years Old
Mindset	**Learning & Achievement** *focuses on learning academically and emotionally, while developing interests and hobbies.*	**Identity & Exploration** *includes learning academically, seeking independence, while grappling with peer pressure and self-image.*	**Ambition & Self-Discovery** *revolves around ambition, exploration of life paths, and establishing a sense of purpose.*	**Responsibility & Stability** *adopts a mindset focused on stability, family responsibilities, and career advancement.*	**Reflections & Legacy** *include acceptance of aging, sharing wisdom, and focusing on relationships and health.*
Types of Energy-Needs – **Daily**	**Developmental** fatigue from balancing schoolwork, social activities, play, and need for emotional regulation.	**Growth** fatigue due to academic pressures, social dynamics, and hormonal changes.	**Responsibility** Persistent fatigue due to the everyday pressures of career/school, family responsibilities, and caregiving (for kids and parents). Often aggravated by mid-life crisis.		**Aging-Related** fatigue due to factors like adjustments to retirement lifestyle, medications, changes in sleep patterns, and menopause for women.
Contextual			**Lifestyle** fatigue from a busy and high-stress lifestyle choices related to work, personal hobbies, and social life.		
			External Factors fatigue due to acute health conditions like temporary sickness (e.g. flu) or dehydration from physical activities/season.		
	Insufficiency/Deficiency & Individual Needs fatigue due to gap in a specific nutrient intake				

Energy-focused Brand Architecture

Brand Essence: Energy that Ignites your Best

Brand Benefit POD: ***Clinically-proven energy for body & mind, tailored to your life, with an uplifting experience so you can keep going and showing up at your best.***

CLUSTER NAME	1 - HELP ME SUSTAIN MY ENERGY	2 - HELP ME BOOST MY ENERGY	3 - HELP ME RECOVER MY ENERGY	4 – HELP TAILOR THE INGREDIENTS BASED ON MY ENERGY NEEDS
Functional Benefit	Full Energy that Lasts Through the Day	Rapid Boost of Energy for Peak Performance (Physical & Mental)	Energy Recovery after Fatigue-Inducing Situations	Specific Energy nutrients expertly formulated for your Unique Energy Needs
Emotional Benefit	Unstoppable Enthusiasm To Tackle the Day	Quick Surge of Motivation to Conquer	Revitalized Come-Back	Empowerment For Tailored Self-Care
Product Features	Blend of multi-nutrients that help keep energy level steady through the day	Blend of multi-nutrients that help keep you immediately alert & focused when you need to perform	Blend of multi-nutrients that help you recover energy lost due to sickness, physical activities, or other factors	Single/Dual Micronutrient that can help either sustain, boost, or recover your energy, whichever you need
Sub-Brand	**SUSTAINED ENERGY**	**ENERGY BOOST**	**ENERGY RECOVERY**	**ENERGY EXPERT**
Sub-Pillars	ADULTS | KIDS | 50+	PHYSICAL | MENTAL	HYDRATION | IMMUNITY	N.A
Naming Principles	Berocca Sustained Energy Benefit *(e.g. Long-Lasting Energy)* Format *(e.g. Effervescent)*	Berocca Energy Boost Benefit *(e.g. Fast boost of physical & mental energy)* Format *(e.g. Gummies)*	Berocca Energy Recovery Benefit *(e.g. Energy Recovery powered by Hydration)* Format *(e.g. Effervescent)*	Berocca Energy Expert Ingredient *(e.g. Vit B Complex)* Format *(e.g. Capsule)*
Role in Portfolio	Core business to build Penetration by addressing Daily Energy needs in **key life-stages**	Address **occasion-based Energy needs** – for when they need to perform physically and mentally.	Address **occasion-based Energy needs** – for when they need to recover energy after fatigue-inducing situations.	**Ingredient-led offering** addressing both daily energy and occasion-based needs

Pack Design Architecture

Sustained Energy	Energy Boost	Energy Recovery	Tailored Energy

Strategic Pricing Guardrails

POSITIONING

We are category leaders, and our premium positioning is driven by:

- **Expertise & Credibility**: leading Brand with 55+ years of supporting the energy needs of consumers.
- **Science:** the most studied energy multivitamin in the world.
- **Consumer Experience:** great testing solutions in iconic formats.

We play to win in the chosen demand space / price tier intersection by using a 3-level external and internal approach:

1) **Brand level:** assessing our Brand Premiumness vs. key selected strategic competitor.
2) **Demand space level:** applying our right-to-price model.
3) **Sku level:** performing competitive benchmarking at a proposition and pack size level, considering our point of differences.

ARCHITECTURE

Demand Spaces:

We selected 3 Energy need spaces + ILP

- Sustain Energy is our anchor space.
- Follow market development model to price other Energy needs (Energy Boost, Energy Recovery).
- Reflect each need market dynamics (relative premium vs. others).

Price Tiers:

We serve consumers across all price tiers (including value in the relevant markets) and drive trade-up via tiering (Mainstream, Premium).

Formats:

Our anchor format is EFT (price index 100) but we play across all main formats (FCT – index 100) and Gummies – index 110), and future-proof the brand by assessing new ones (e.g. powder, syrup, chewable…) that can bring higher margins.

Pack Sizes:

Use pack sizes effectively focusing on smaller packs to drive trial (notably 10ct) and larger packs for trade-up.

ASSORTMENT

Assortment:

Ensure minimal strategic assortment in place in Sustained Energy (accross formats and lifestages) before expanding to Energy Boost, Energy Recovery & ILP.

Incentive Curve:

We use different pack counts to answer different need state and shopper mission, and reward loyalty with higher incentives.

	Trial	Entry	Anchor	Stock-up			
Size Factor	< 0.5 x	0.5	1x	1.5x	2x	2.5x	>3x
EFT Pack Size	1,2 ct	15ct	30ct	45ct	60ct	75ct	>90ct
Index	**> 120**	**120**	**100**	**95**	**90**	**85**	**80**

CHANNEL & PROMOTION

Channel:

- **Pharmacy is our #1 channel globally where HCP reco / dereco is critical.**
- **We tailor the PPA by channel** to address specific **shopping occasions, secure incremental distribution** & visibility and **resolve cross channel pricing conflicts.**
- Explore new growth channels like vending or quickly growing Tik Tok shop.

Promo:

- Promo depth in line with competition and with best proven ROI tools (i.e. UK 3for2).
- Benefit from retailers promo-plans during price promotions.
- Select promo pack in line with JTBD: (i.e. larger packs to incentivize stock up, entry pack to drive trial).
- Connect promo with periods to support key Brand moments (i.e. winter, back to school, exams)
- Use displays/secondary placements.

Thank YOU!

For details or questions, please reach out to:

Nicolas Mansali – Brand Leader Berocca
Sinan Yuksel – Director Nutritionals