Nestlé prepared dishes & cooking aids

A. Helio Waszyk - Head of the Food Strategic Business Unit
Our portfolio includes strong Brands covering all geographies

2007 total sales of CHF 18.5 bn
out of which CHF 14.5 bn in Retail

Source: Nestlé

World of Culinary
(35% of sales)

World of Frozen and Chilled
(65% of sales)

Source: Nestlé
6 Food Brands worth more than CHF 1 bn

**Maggi**

- Strong #2 Brand in bouillons & seasonings, sauces, recipe mixes, soups and noodles

**Stouffer's**

- #1 US brand in frozen ready meals

**Buitoni**

- #1 Italian brand in chilled pasta and #1 Italian brand in frozen pizzas in Europe

**Hot Pockets**

- #1 US brand in frozen handheld snacks; building in Europe

**Herta**

- #1 branded charcuterie in France and Germany

**LEAN CUISINE**

- #1 US brand in frozen nutritional meals

Source: Nestlé
Nestlé regional prepared dishes & cooking aids positions

Source: Euromonitor, strategic categories
Prepared dishes & cooking aids is an important NPS and EBIT provider for the Group

2007 EBIT (% sales)

- Prepared Dishes and Cooking Aids: 13.0%
- Nutrition: 17.2%
- PetCare: 15.5%
- Confectionary: 11.6%
- Milk products & ice cream: 11.1%
- Waters: 8.2%

Source: Nestlé

Investors meeting 19 November 2008
Strong Global and Regional Brands...

- ... with Nutrition, Health and Wellness credentials...
- ... reinforcing strong market positions in Western Europe and North America
- ...while unlocking Emerging Consumer in Eastern Europe, Asia, Latin America and Africa
Leveraging Technology to deliver Nutrition, Health and Wellness: The Asian Noodles case...

"Airbud" Asian noodles sales - Asia

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<th>2008</th>
<th>2009</th>
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<td>Growth</td>
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20-30% Growth expected for 2008-2009
Evolution of HERTA sales - France

2006

2007

8% Growth in 2007
All Food Brands are innovating to reinforce NHW
The Frozen category in Europe is driven by Pizza and Casual Eating thanks to our strong Brands and superior products.
BUITONI USA: The first choice for consumers in premium Italian meals

**BUITONI USA sales**

- 2005
- 2006
- 2007

over 20% growth per annum

[Image of Buitoni products]
STOUFFER’S and LEAN CUISINE: Delivering nutritious easy meal solutions

9% growth per annum

Sales of Stouffer’s / Lean Cuisine - USA

2005  2006  2007
We are turning around HOT POCKETS and LEAN POCKETS

Sales of HOT POCKETS / LEAN POCKETS - USA

Back to double digit growth in 2008
MAGGI Germany is gaining Market Share and growing in core categories

Recipe Mixes Market Share evolution in Germany

... with successful segmentation

... and impactful Innovation & Renovation
With PPP we are reaching out for the needs of Emerging Consumers with 25% growth in 2008
Strong Global and Regional Brands...

- ... with Nutrition, Health and Wellness credentials...
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