

Zoeterwoude, 10 June 2011

Heineken



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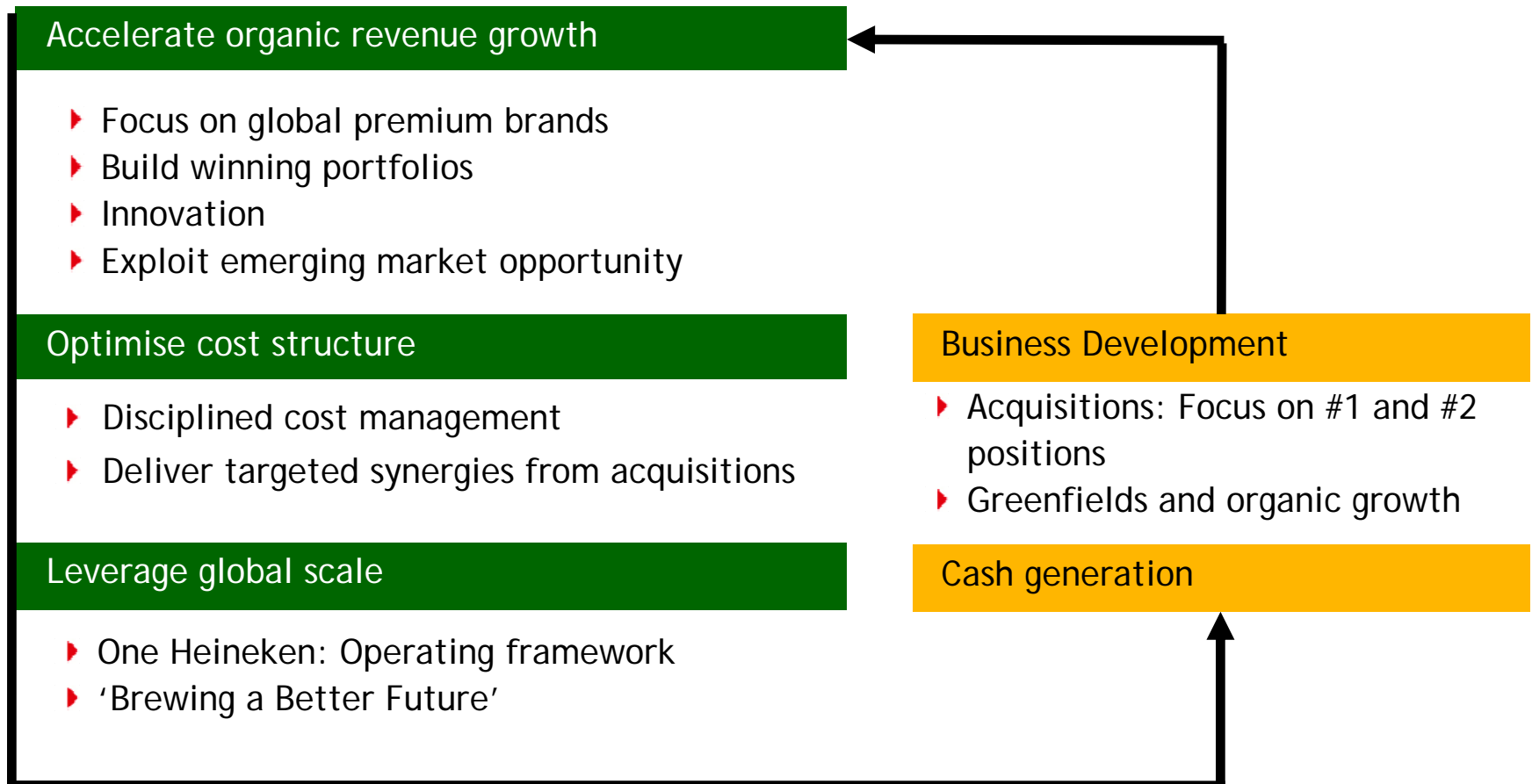
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Supply Chain Investor Seminar Welcome to Zoeterwoude - Heineken's 'Mega Brewery'

René Hooft Graafland

Member of the Executive Board and CFO

Heineken's strategy for delivering sustainable growth



Heineken has world class Supply Chain capabilities



Heineken's Supply Chain:

- ▶ A clear point of differentiation within the beverage industry
- ▶ A significant proportion of Heineken's cost base
- ▶ A key source for ongoing cost saving and efficiency improvements
- ▶ Important contributor to brand equity building
- ▶ Provides customer-focused solutions to enhance service levels
- ▶ Leading capabilities support growth

Heineken's Supply Chain offers an important source of differentiation

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Infrastructure

- ▶ Adapted to Heineken's unique business model
- ▶ Develop efficient brewery and logistics footprint
- ▶ Evaluate proximity to consumer
- ▶ Optimise cost structure



Technology

- ▶ Leverage technologies to support efficiency improvements
- ▶ Optimise sourcing and use of raw materials
- ▶ Ensure highest quality of our products
- ▶ Foster innovation



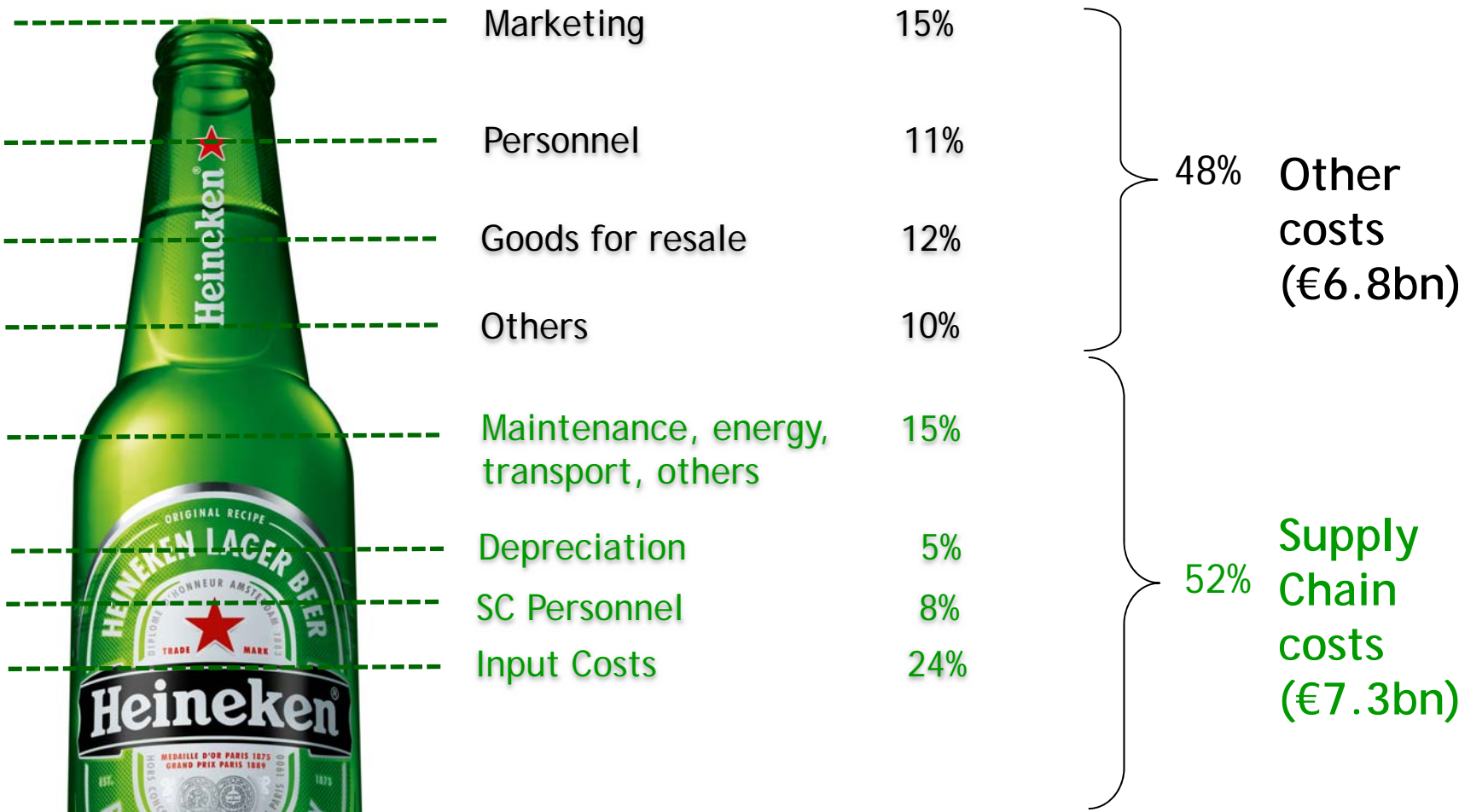
People

- ▶ Drive process and productivity improvements
- ▶ Global governance framework
- ▶ Investment in training and development

Supply Chain represents just over half of Heineken's total cost base



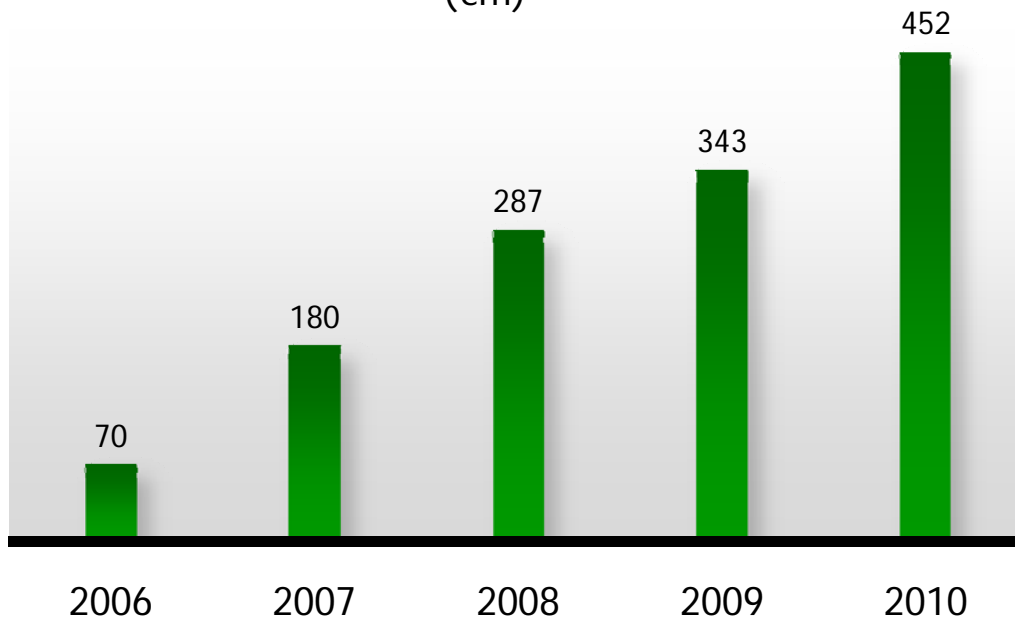
Breakdown of Heineken Cost Base (2010)



Supply Chain is the largest single contributor to cost savings

- ▶ Supply Chain has realised €452 million of cost savings since 2006
- ▶ Represents around 50% of total savings

Supply Chain Cumulative Cost Savings
(€m)



Further opportunities exist for efficiency and productivity improvements

Supply Chain supports brand equity building

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High Quality



Research & Innovation



Heritage Breweries



Supports sustainability agenda



Proven Supply Chain capabilities expanding platforms for growth

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Example 1: South Africa

- ▶ Construction time from breaking ground to first brew in 16 months
- ▶ Expanding capacity from 3 mhl to 4.5m hl
- ▶ Recruiting and training local workforce



Example 2: USA: Second largest container shipper across the Atlantic



Heineken Netherlands
Supply



Port of Entry



Sealed Marine Container
1840 Cases



Distributor



HEINEKEN
INVESTOR SEMINAR
JUNE 10, 2011
ZOETERWOUDE

- 11.15-12.00** GLOBAL SUPPLY CHAIN — LEVERAGING HEINEKEN'S UNIQUE FOOTPRINT FOR SUSTAINABLE ADVANTAGE
[Marc Gross](#) / Chief Supply Chain Officer
- 12.00-12.40** MANAGING AN EFFICIENT FOOTPRINT WITHIN AN EVOLVING MARKETPLACE
[Wiggert Deelen](#) / Senior Director Regional Supply Chain
- 12.40-13.40** Lunch Break
- 13.40-14.10** A PROPRIETARY TOOL FOR DELIVERING WORLD CLASS PERFORMANCE
[Chris Kerr](#) / Director Global TPM
- 14.10-14.40** DRIVING PERFORMANCE THROUGH A PROVEN PROCESS
[Magne Setnes](#) / Global Supply Chain Control Director
- 14.40-15.20** CONNECTING OUR SUPPLY CHAIN TO OUR CUSTOMERS
[Henk van Rooijen](#) / Senior Director Global Logistics

A tour of our 'Mega Brewery'

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Applying proven processes and tools in practice

▶ Zoeterwoude Brewery: The Netherlands



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