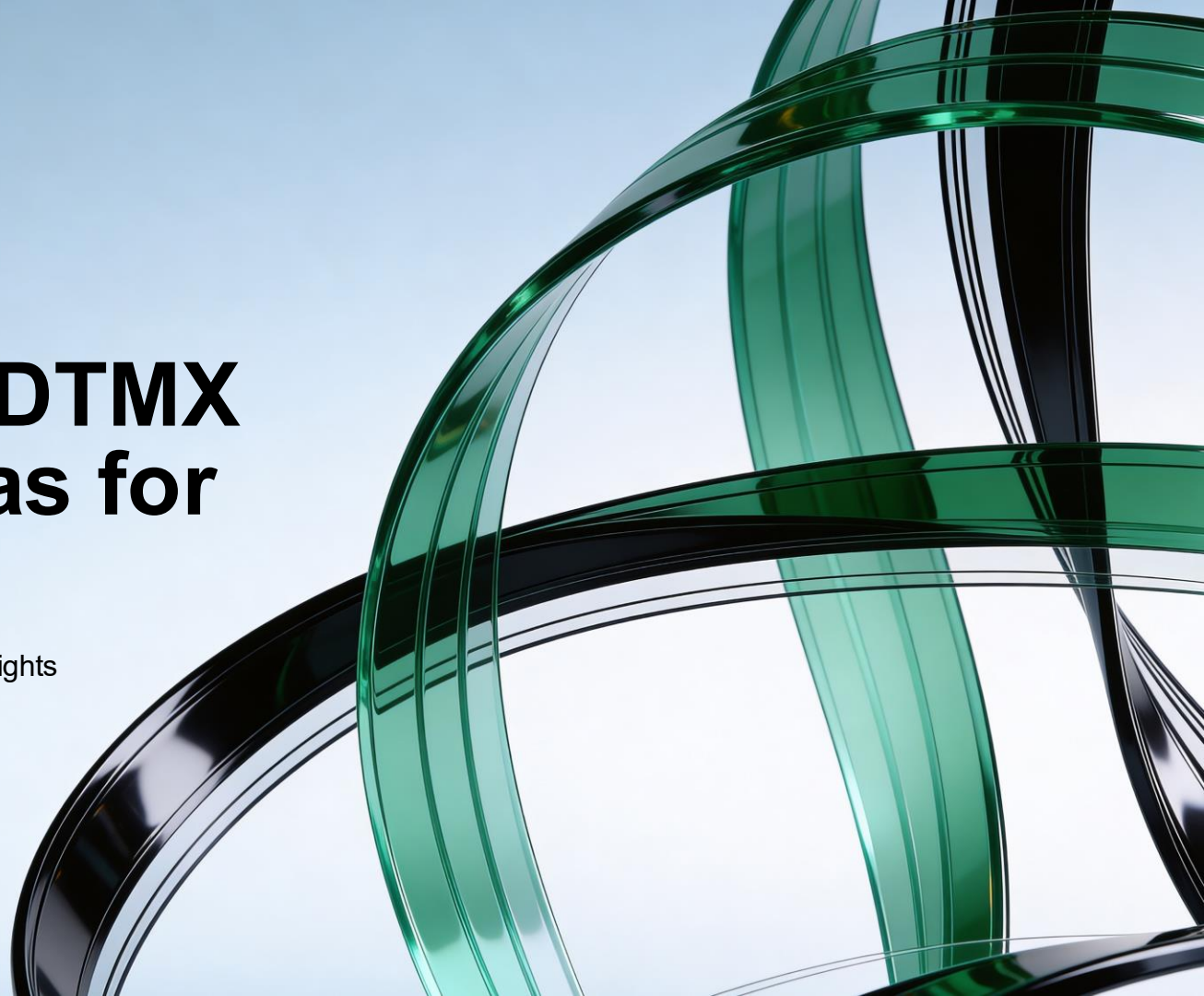


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DTMx 3.0

Coca-Cola DTMX growth ideas for India

Based on Consumer and market insights



We're embedded in India

1.47B Population

\$22B Soft drinks market

Fourth Largest economy

46% XXX

KEY DISTINCTIONS

Occasion-led, not habitual—consumption is a luxury for many Indians and saved for special moments.

Drinks run on ₹10–20 price points.

Reliance's Campa Cola has doubled emerging brand share to ~15% in the ₹10 segment, and 7% overall

Tier-1 cities average 10–12 bottles/year; Tier-3 and rural remain below 5.

Thums Up is the primary driver of rural growth; Coca-Cola original leads in urban/premium.

INDIA

AT A GLANCE

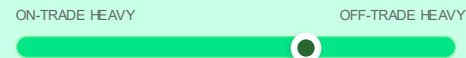
DIGITAL EMBEDDEDNESS



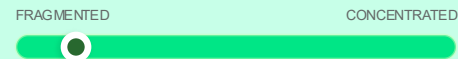
CULTURAL EMBEDDEDNESS OF SODA



ON/OFF CONSUMPTION LEAN



RETAIL ECOSYSTEM



We know your competitive growth context

01



Campa cola disruptive threat to value model

Extremely price-sensitive country. Campa Cola's strategy at a lower price point and connecting with rural and Tier 3-4 India using simple physical presence, and designs around real infrastructure limits.

02



Infrastructural risks jeopardize visibility

Structural constraints in physical retail, temporary POS is quickly replaced by competitors, and durable assets like viscoolers or signage require high investment.

03



Middle-class emerging health pivot

Tier-1 consumers are shifting to cans and single-serve formats to manage sugar intake. From March 2026, generic GLP-1s became available at ~₹1,290/week—potentially accelerating further moderation across urban India.

The background features several thick, glossy, green glass-like shapes that appear to be flowing or curving. These shapes are semi-transparent and have a high-gloss finish, reflecting light. They are arranged in a way that creates a sense of movement and depth, framing the central text.

DTMx3.0

We can help **you grow**

India's next wave of growth lives beyond the metros. Focus strategies to connect with Tier-2–Tier-4 cities and rural spaces.

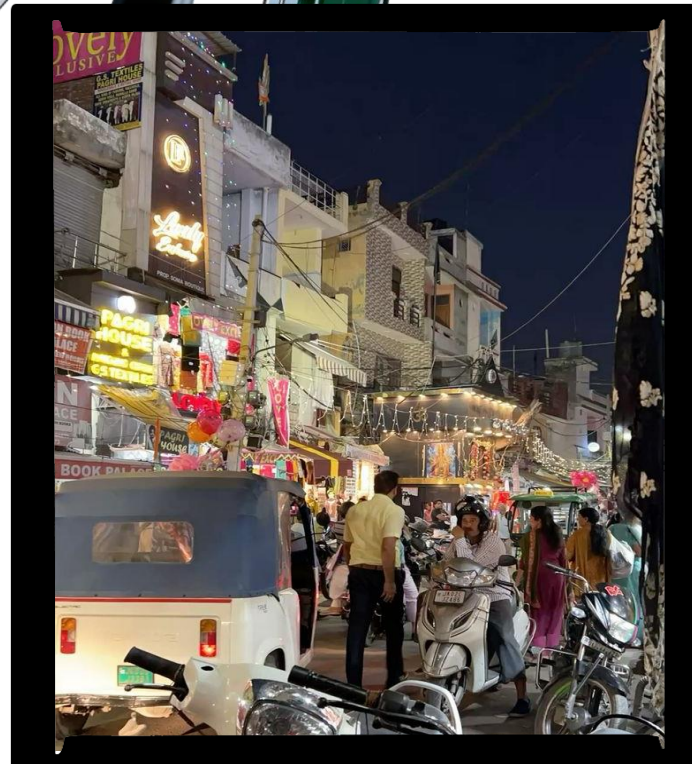
Localize POSM in regional vernacular to connect with every India

India is many countries pretending to be one.
India has 22 official languages across 12 scripts.
However, localizing goes beyond the language.

Regions differ in:

- Humor
- Pace
- Storytelling
- Cultural triggers
- Emotional motivators

The opportunity is to scale vernacular POSM—
adapting tone, imagery, and cultural cues by region,
at scale, without fragmenting brand consistency.



Find occasions to build association in rural spaces

Even at ₹10, cola is an occasion drink in rural India. Consumption is growing faster here than anywhere, but the occasions to drive attachment look different to those in metro India.

- Regional festivals
- Weekly haats
- Festival days in smaller towns that aren't national calendar days but massive locally

The opportunity is to map rural India's occasion calendar and build activation kits designed for these moments.

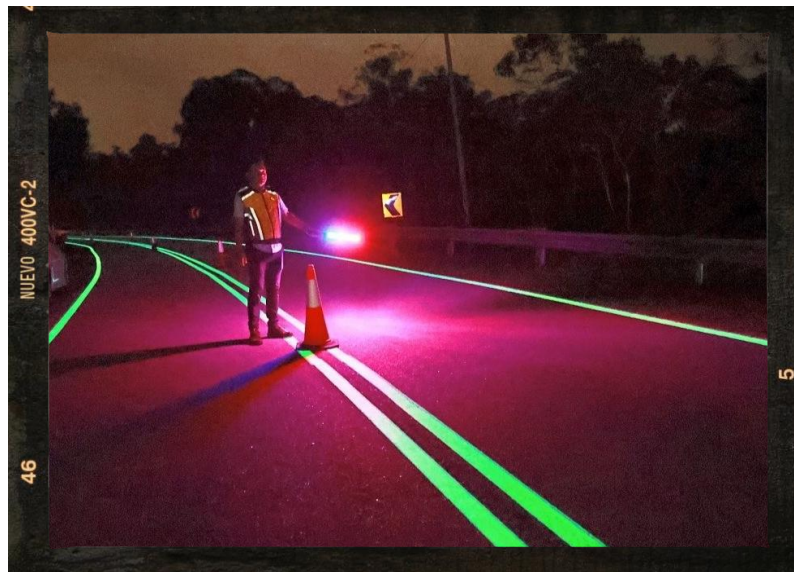


Innovate to stand out with limited electricity at nighttime

Increased grid connectivity and solar innovation have improved electricity supply in recent years. However, some areas of rural India still experience periods of power shortages.

- During a heatwave in May 2024, only 8–10 GW of India's 140 GW renewable capacity was available during evening peak periods (IECC, 2024)
- The country could face evening shortfalls of 20–40 GW by 2027

The opportunity is to optimize low-cost, low-power, locally maintainable visibility at night, leveraging innovations in phosphorescent inks, solar-powered signage, reflective materials with behavioral visibility design.



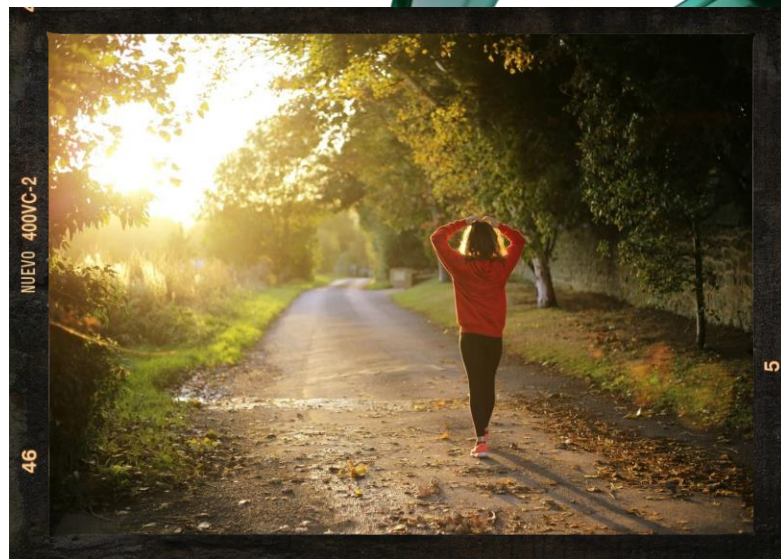
Amplify functional messaging and smaller formats to metro middle class

Semaglutide patent expiry meant that, since March 2026, Indian people can now get weekly injections of GLP-1 from ₹1,290 (\$14) per month.

Notable shifts in the food and drink consumption of the middle classes we've seen in the U.S. is expected this year in India:

- Reduced consumption of alcohol and soft drinks
- Increased consumption of functional beverages

The opportunity is to emphasize hydration, health benefits, and lower sugar, for functional brands in the portfolio, and targeted messaging for smaller formats in metropolitan spaces where purchase is motivated by wellness rather than price.





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Thank
you