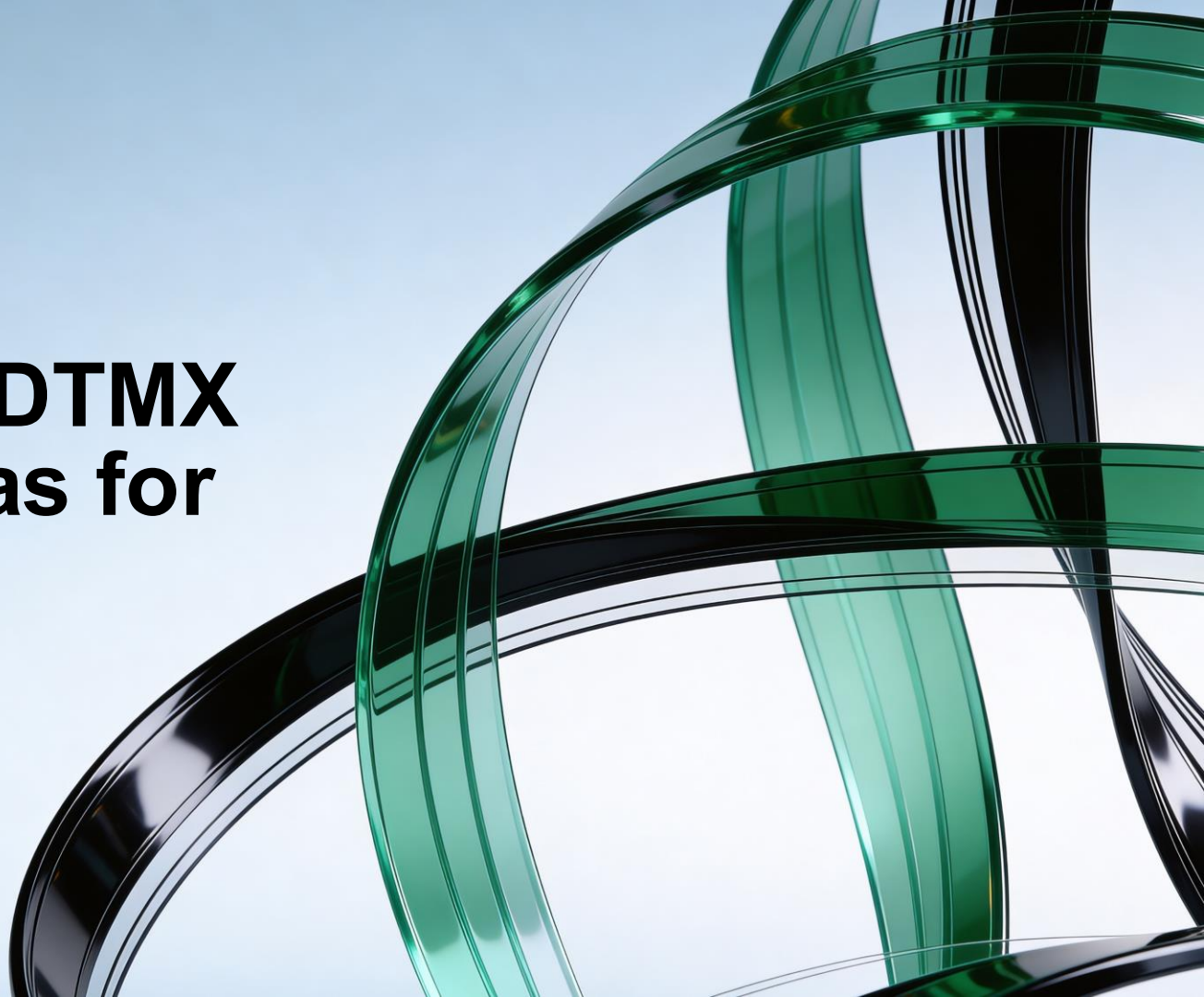


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DTMx 3.0

Coca-Cola DTMX growth ideas for **Indonesia**

From Consumer and market insights



We're embedded in Indonesia

280M

People. 4th largest population globally

~30

Median age. Young consumer base

87%

Muslim; non-alcoholic consumption the norm

3.5M+

Warungs. Backbone of retail

KEY DISTINCTIONS

The Indonesian consumer is shopping little and often. The spaces and places they are purchasing are either small independent Warungs or Minimarket

Noonkrong is the moment of hanging out. Extended hangouts with family and friends are the norm.

Coffee and tea are the default. Soda is not yet as culturally embedded and consumption is concentrated around peak calendar moments

Whilst the average Indonesian drinks less CSD than other countries; consumption is steadily growing in part due to rising incomes, hot weather, flavour and functional innovations, and online trends.

They are an online nation with the largest TikTok userbase, high time online and comfort with cashless payments.

INDONESIA

AT A GLANCE

RETAIL ECOSYSTEM

FRAGMENTED

CONCENTRATED



CULTURAL EMBEDDEDNESS OF SODA

LOW

HIGH



ON/OFF CONSUMPTION LEAN

ON-TRADE HEAVY

OFF-TRADE HEAVY



DIGITAL EMBEDDEDNESS

HIGH

LOW



We know your competitive growth context

01



Price conscious consumers

Local brands win on price and GT distribution. Promotion drives consumption

02



Independent footprint

Fragmented trade market with millions of independent retailers

03



Soda not default

Need to drive and connect around peak consumption moments and drive drink attachment

The background features several thick, glossy, green lines that flow and curve across the frame, creating a sense of motion and depth. These lines are set against a plain white background.

DTMx3.0

We can help **you grow**

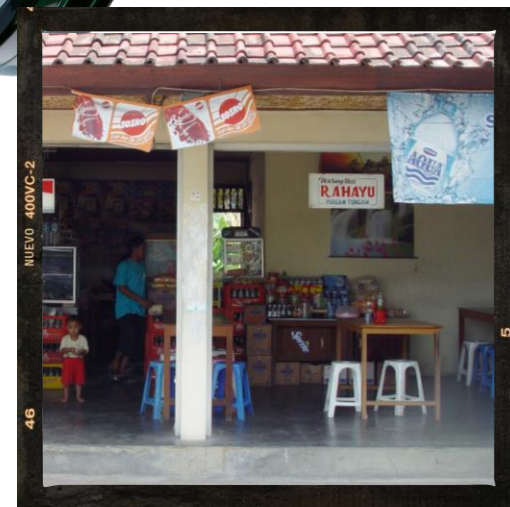
Because CSDs aren't culturally embedded, Coca-Cola has to work harder at capturing attention and connecting with consumers

Think creatively about **Warung** **POSM**

Warungs are critical for impulse purchases; visibility and durable POSM (permanent and temporary) are key.

- A typical warung is 3x5 metres, yet these outlets collectively account for ~70% of Indonesia's total retail transactions, making every square centimetre of branded visibility competitively critical.
- 67% of Warung customers said they shop at their local store everyday

The opportunity is to win by being useful, visible and fast; distributed with the product and inventive without being complex



How HH Global can help you grow

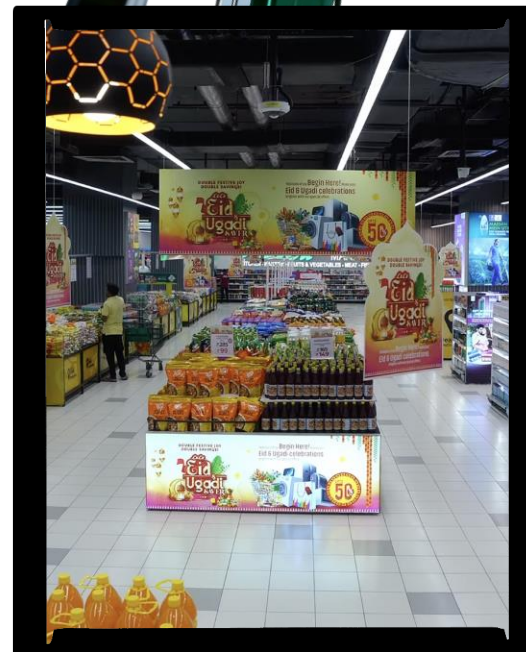
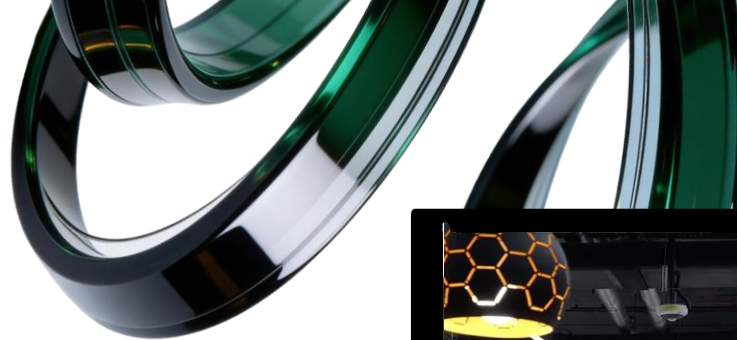
Use innovation to **cut through the noise** around peak moments

Consumer soft drinks consumption are concentrated around peak calendar moments: Ramadan and New Years and the main challenge is standing out in a highly competitive market.

- For 80% of Indonesian consumers, Ramadan is the biggest shopping event of the year
- Spending rises 20% during Ramadan.
- Local and affordable brands outgrow premium and leading brands as shoppers become more selective

The opportunity lies in using inventive formats and digital tools that capture the senses with light, movement, and interactivity; enhancing visibility, especially in minimarkets and hypermarkets.

Sources: Strava/YouGov



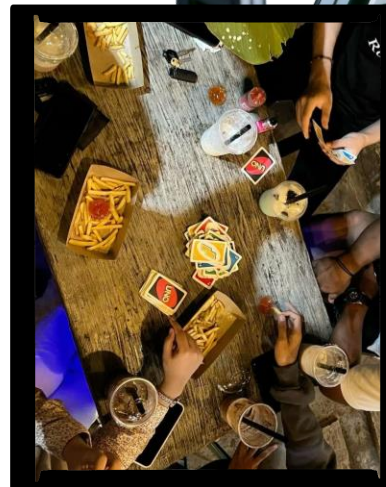
How HH Global can help you grow

Leverage collecting culture to **amplify ROI**

Indonesia is one of the biggest markets for K-pop and Indonesians are increasingly adopting Korean fan culture practices across different sectors.

- Fandom contributes approx. 61% to purchasing decisions among Indonesian K-pop fans.
- Photocard collecting and trading is big in Indonesia. Reaching as high as IDR 10M (~£500) in resale value.
- Research shows Indonesian fans transfer K-pop collecting behaviours (photocards, merchandise, fan projects) into new categories .
- Collecting and gaming are woven into gen z daily life. Table-top games like UNO are a staple of Nongkrong – featuring in 30% of UGC content tagged Nongkrong on Pinterest.

The opportunity is to build collectible mechanics into merchandising: photocard inserts in multipacks, regional variant designs, and table-top game collaborations leaning into fandom-driven repeat purchase.



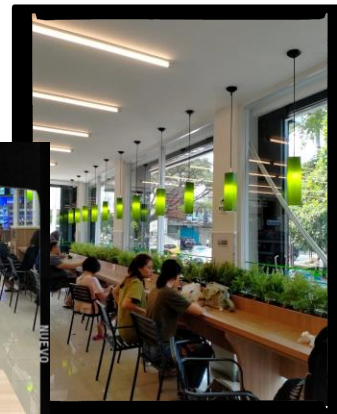
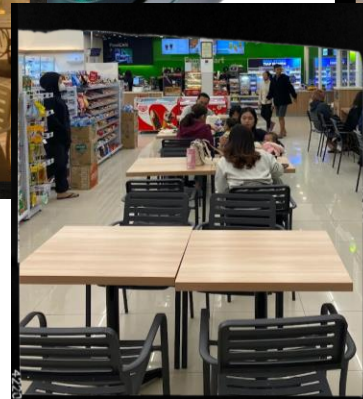
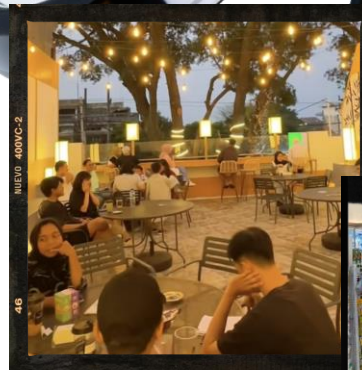
How HH Global can help you grow

Make the most of Minimarkets acting as a Gen-Z hangout

Minimarkets function as social spaces, particularly for Gen Z, not just convenience retail:

- FamilyMart generates around 50% of its transactions from food and beverage.
- Nearly all modern retail has café counters.
- Dwell time is on-trade, but the environment is still activated like off-trade.

The opportunity is to apply on-trade activation thinking to off-trade environments: counter branding, seating area presence, digital screen content, sampling stations in places where people are already spending time.



How HH Global can help you grow

Create an experience layer with QR-ready streets

Indonesia is one of the most digitally wired consumer markets and the scan-to-experience behaviour already exists at street level.

- QRIS payments are widely used and QR codes hang outside every warung.
- Coca-Cola has proven the mechanic with Fanta's Ramadan gerobak QR-triggered sampling at 20 retail locations and Frestea nationwide QR digital voucher redeemable in modern retail.

The opportunity is driving trial scaling the digital mechanics across the general trade infrastructure that have already proven they create demand when they are run.



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Thank
you