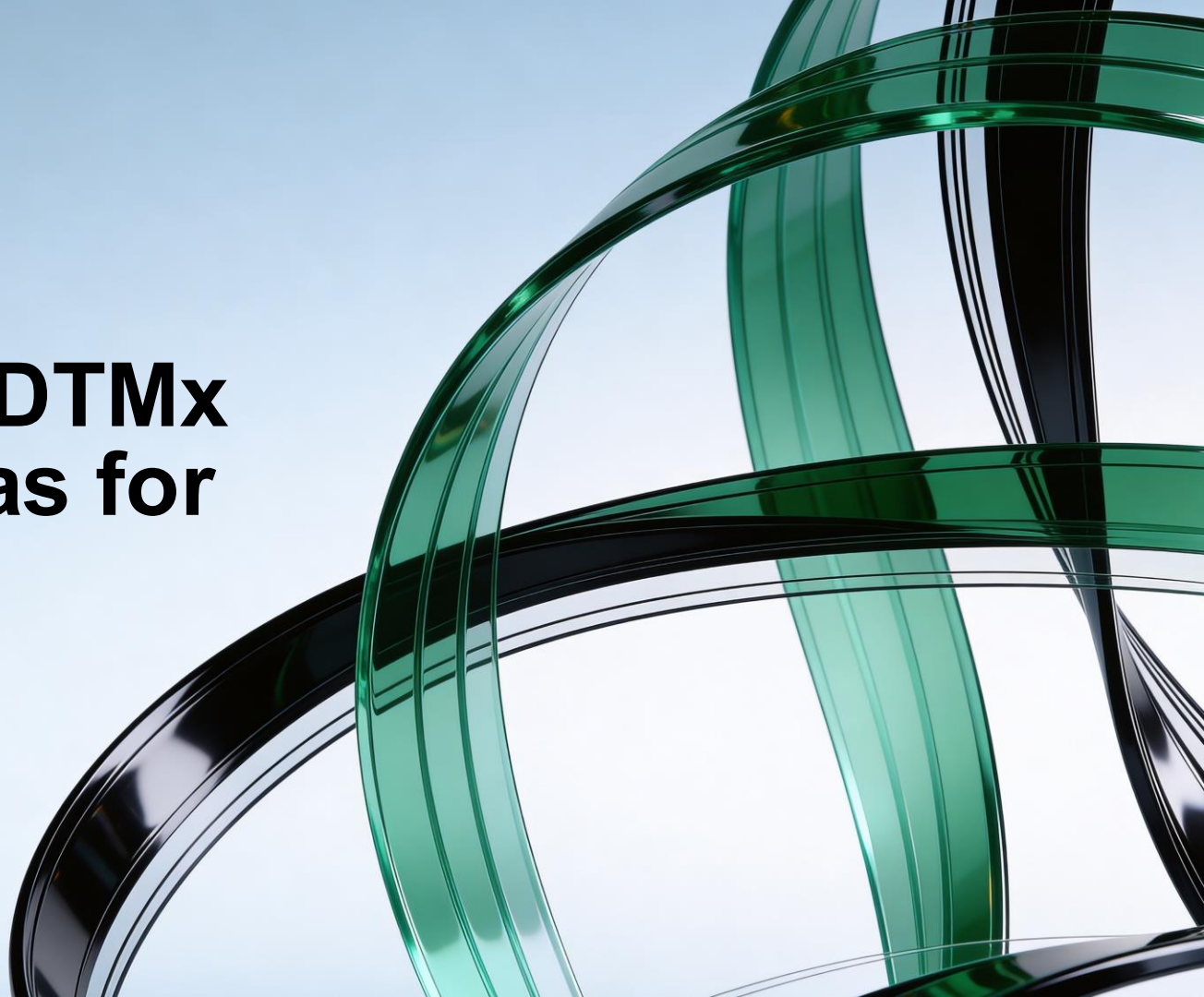


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DTMx 3.0

Coca-Cola DTMx growth ideas for **Mexico**

From consumer and market insights



We're embedded in Mexico

~130m Population

\$34B Soft drinks market

~745 Servings of Coca-Cola per person per year

#1 Ranking for per capita Coca-Cola consumption

KEY DISTINCTIONS

Coca-Cola is the culture. The cultural and emotional connections people have with Mexican Coca-Cola is evident.

It's a daily fixture alongside meals and social settings. The Cuba libre is a staple mixer in bars and cantinas.

People love the cane-sugar formula and glass bottles.

Affordability drives format choices, returnables, 2- and 3-litre bottles, and value multipacks.

Traditional retail accounts for over 40% of all retail sales.

Tourism is Mexico's third-largest income source, creating premium and mixer moments.

Mexico

AT A GLANCE

CULTURAL EMBEDDEDNESS OF SODA



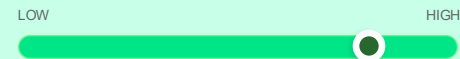
ON/OFF CONSUMPTION LEAN



RETAIL ECOSYSTEM



DIGITAL EMBEDDEDNESS



We know your competitive growth context

01



Sugar taxes and tightening regulation

Excise taxes are rising and may expand to cover zero-sugar products in 2026. NOM-051 warning labels restrict on-pack branding including mascots and child-targeted imagery.

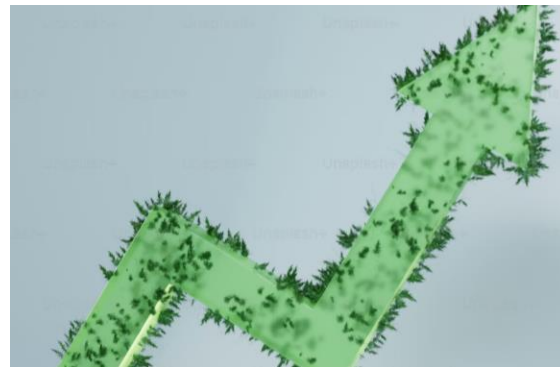
02



Challenger brands competing on price and locality

Own-label and local brands compete on price, particularly through hard discounters like Tiendas 3B. Private-label accounts for 58% of discount channel revenue and growing.

03



Limited headroom for growth

Cost and margin headwinds, combined with a saturated Mexico market, make profitable volume growth harder.



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We can help you grow

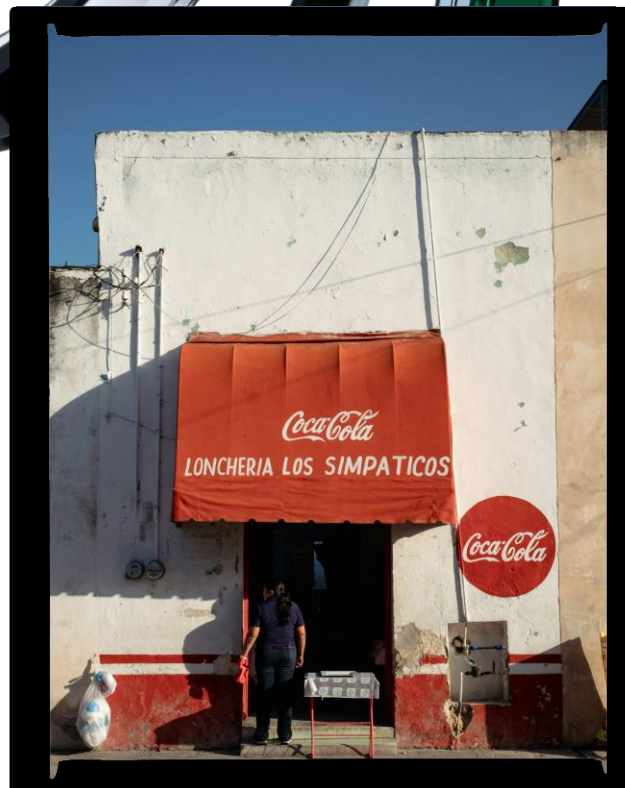
Defend share of sales with brand-building
POSM at the point of purchase that is
produced smarter, showing up better

Scale neighborhood POSM that matches the brand love

Coca-Cola is culturally embedded in Mexico like nowhere else, and across touchpoints on and off trade, but the challenge is executing consistently across fragmented spaces.

- Mexicans like Coca-Cola more than another other market, with the highest per-capita consumption
- Mexico's beverage ecosystem is highly fragmented, with ~600,000 independently owned tienditas and majority independent food service operators

The opportunity is to deliver POSM that feels native to the neighborhood tiendita while maintaining the production quality and brand consistency that Coca-Cola's cultural status in Mexico demands.

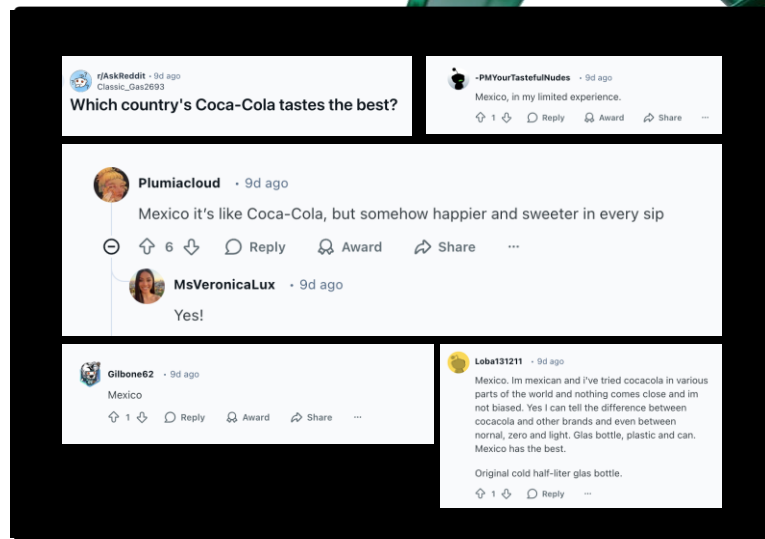


Anchor to national pride with “World’s Favorite Coke” messaging

Mexican Coca-Cola is celebrated globally—the cane sugar formula, the glass bottle, the taste that consumers worldwide say “hits different.”

- Preference for Mexican Coke is a recurring theme across social media, with consumers citing real sugar, nostalgia, and cultural authenticity

The opportunity is to bring “World’s Favorite Coke” messaging into general trade POSM—turning a cultural truth that already lives in consumers’ heads into a visible, physical brand presence at the counter, the cooler, and the storefront.



Cut through the cluttered retail environment with POSM innovation

For most shoppers, the store environment is “noise” and they don’t notice displays, even when they’re right in front of them.

- 7 in 10 Mexican shoppers are susceptible to buying more than they planned if something catches their attention

The opportunity is to design POSM that captures attention through visual disruption: 3D displays, sensorial formats, motion-triggered solutions, that break shoppers out of autopilot at the point of purchase.

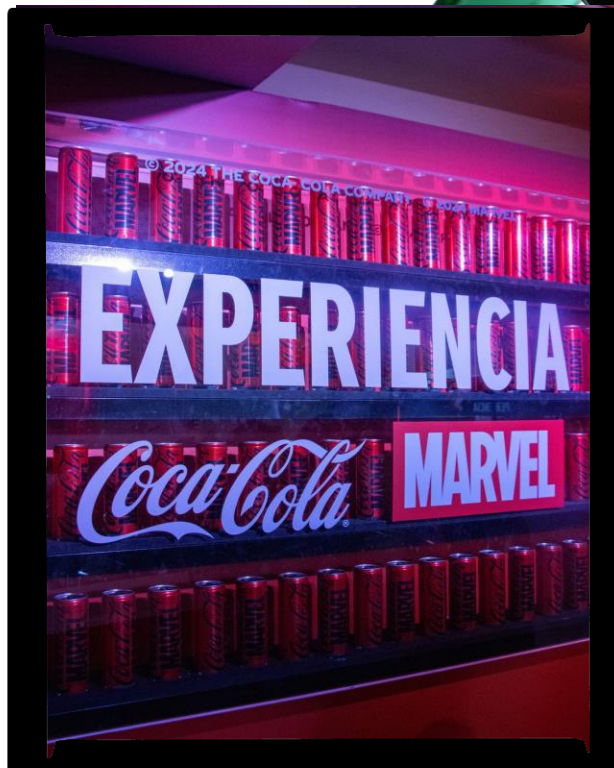


Create an experience layer with extended reality on displays

Coca-Cola is already deploying scannable AR packaging across Mexico—Marvel, Star Wars, and collectible campaigns that unlock digital experiences through QR codes.

- Mexicans prefer retail that combines physical and digital elements at the same point of sale.
- 80% of consumers want to experience innovative products and services

The opportunity is to bring Coca-Cola's AR and collectible campaigns into the in-store and on-trade experience through simple, swappable counter displays with digital activations.





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Thank
you