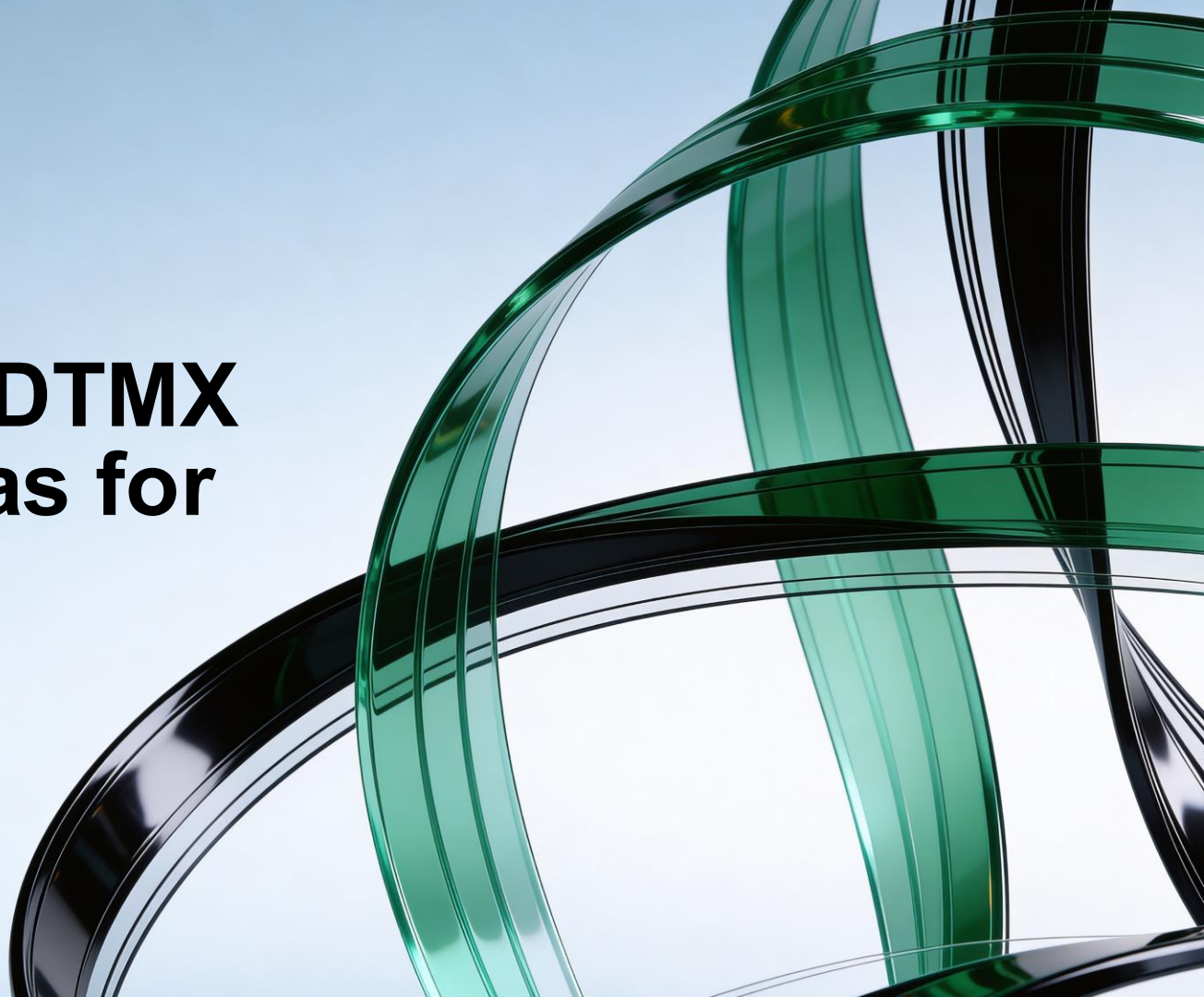


hhglobal

DTMx 3.0

Coca-Cola DTMX growth ideas for the UAE

Consumer and market insights



We're embedded in UAE

11.3m Population

88.5% Expatriates

\$1.3B Soft drinks market revenue

+13,000 Food and Beverage outlets

KEY DISTINCTIONS

88.5% of the population are expatriates from +200 nationalities. Taste preferences are fragmented, trend adoption is fast, and brands must serve value-seeking migrant workers and affluent professionals simultaneously.

HoReCa is the heartbeat. Friday brunch is the defining social ritual, Ramadan iftar and suhoor are the peak seasonal occasions. Non-alcoholic beverages dominate—soft drinks fill the role alcohol plays elsewhere.

Heat drives everything indoors. May–September temperatures exceed 45°C, pushing daily life into malls, air-conditioned dining, and delivery. Malls are the default social destination, not just retail.

Dubai welcomed 19.6M international tourists in 2025. A year-round calendar of festivals, concerts, sporting events, and cultural moments creates constant activation windows across tourism and resident audiences.

UAE

AT A GLANCE

DIGITAL EMBEDDEDNESS



CULTURAL EMBEDDEDNESS OF SODA



ON/OFF CONSUMPTION LEAN



RETAIL ECOSYSTEM



We know your competitive growth context

01



Pouring rights and baqala boycotts

Exclusive pouring rights and consumer sentiment can lock Coca-Cola out of key on- and off-trade spaces.

02



Regulatory squeeze

The new tiered sugar tax (January 2026), Nutri-Mark front-of-pack labelling, Abu Dhabi's outdoor advertising ban on unhealthy food and drink, and the single-use plastic cup ban are all landing at once.

03



Extreme seasonality

Need to build connection around peak moments and drink attachment in the flat periods between them.

The background features several thick, glossy, green, wavy lines that flow across the frame, creating a sense of motion and depth. The lines vary in thickness and curvature, some appearing to curve away from the viewer while others seem to flow towards it. The overall aesthetic is modern and dynamic.

DTMx3.0

We can help you grow

Winning visibility means high-impact moments while simultaneously showing up across a fragmented landscape of venues, retailers, and communities.

Optimize a new channel through lifestyle-focused forecourts

UAE forecourts are evolving from fuel stops into integrated lifestyle hubs—ADNOC, ENOC, and Emarat are investing heavily in convenience retail, QSR partnerships, and EV charging to capture non-fuel revenue.

- Fuel-and-convenience formats now capture 49.9% of segment revenue, with 25–35% of sales coming from non-fuel items through ZOOM and ADNOC Oasis stores
- Highway plazas linked to E11 and E311 arteries earn 20–30% higher revenue per square metre than urban stations—commuter and road-trip occasions are premium moments

The opportunity is to win by innovating eye-catching premium POS moments and pop-ups to cater to the new dwell-time at premium forecourts across the country.

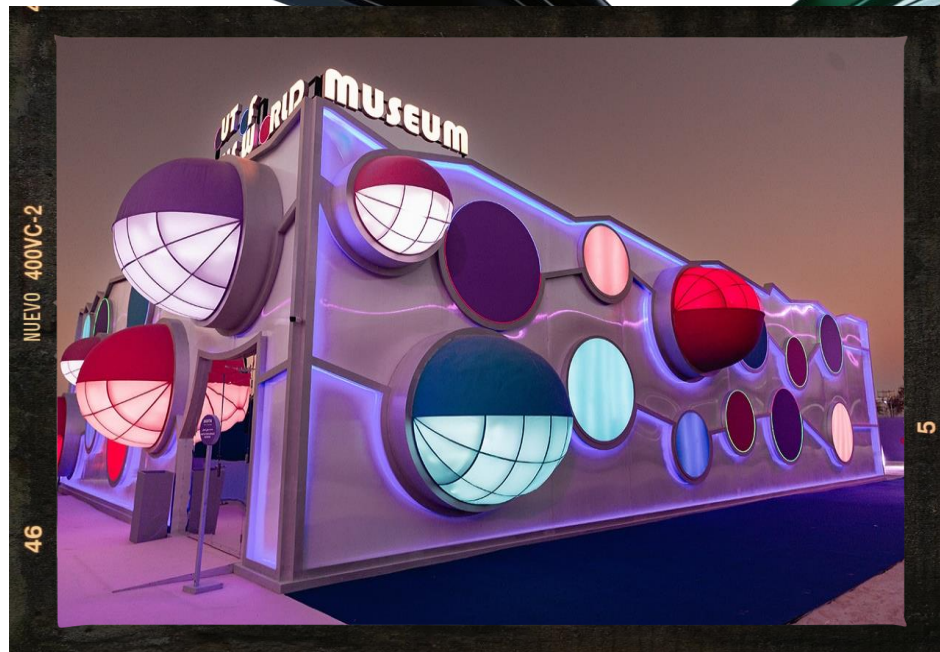


Amplify events and cultural moments with premium experiential

UAE event management market stands at USD 2.46 billion in 2025, projected to reach USD 3.42 billion by 2030—sponsorships growing at 14.35% CAGR.

- Dubai Shopping Festival and Abu Dhabi Film Festival—consumer goods brands creating emotional connections through cultural programming
- Mega-festivals creating experiential activation opportunities at scale

The opportunity is to win by offering premium POSM and activation moments that lean into the awe and wonder that consumers expect from marketing activations during these special cultural moments.

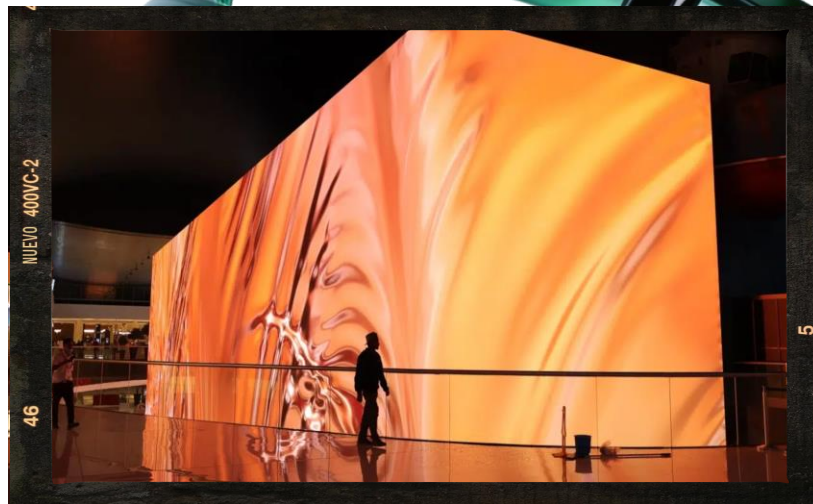


Innovate digital POSM experiences for everyday mall culture

Six in 10 UAE residents visit a mall at least once a week, spending Dh 100–500 per trip—malls are living extensions of communities, not just shopping destinations.

- Dining is the major magnet: F&B drives footfall and dwell time. Dubai Mall alone has 200+ restaurants and cafés, with food courts serving as high-traffic convergence points
- UAE retail is forecasted to hit USD 75 billion by 2025—digital signage market growing past USD 900 million by 2030, creating new canvas for brand activation

The opportunity is to capture attention during dwell time with value-add POSM that excites and engages diners and shoppers in high-traffic spots.

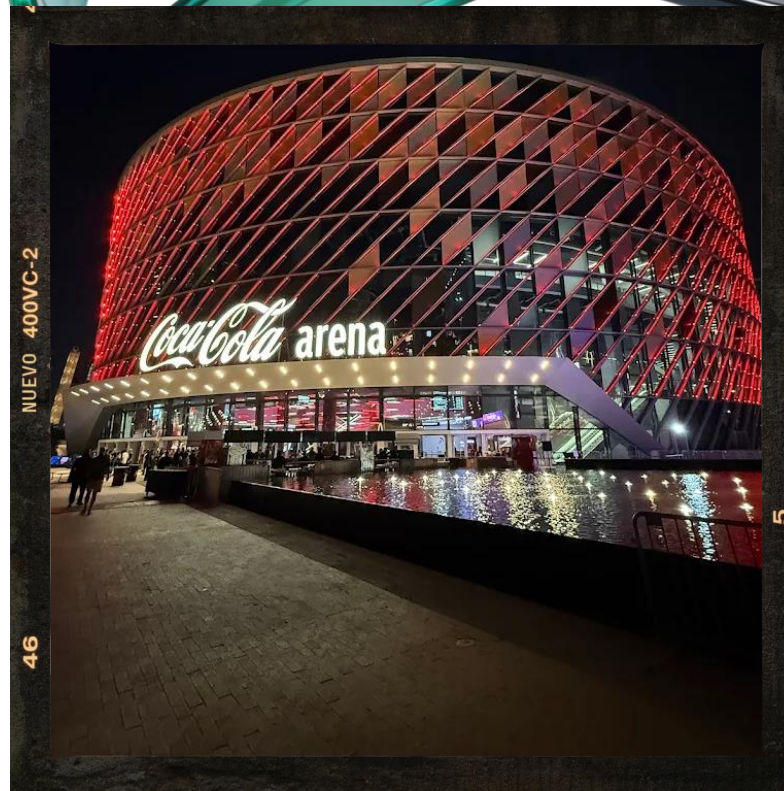


Leverage arena channels for branded merch collabs

Music concerts are the UAEs fastest growing events category at 16.76% CAGR. Coca-Cola Arena passed 500 events in January 2026 as the largest year-round indoor arena.

- Event sponsorship is the fastest-growing revenue stream in the UAE event market at 14.35% CAGR
- Coca-Cola Arena programming spans Bollywood (Arijit Singh, Sonu Nigam, Zakir Khan), K-pop, Arabic pop, and global touring; reflecting the UAE's multi-cultural expat population and creating multiple entry points for co-branded capsule merch

The opportunity is to build a merch production pipeline around Coca-Cola Arena's calendar: capsule collabs, collectible cups, and event-edition packaging.



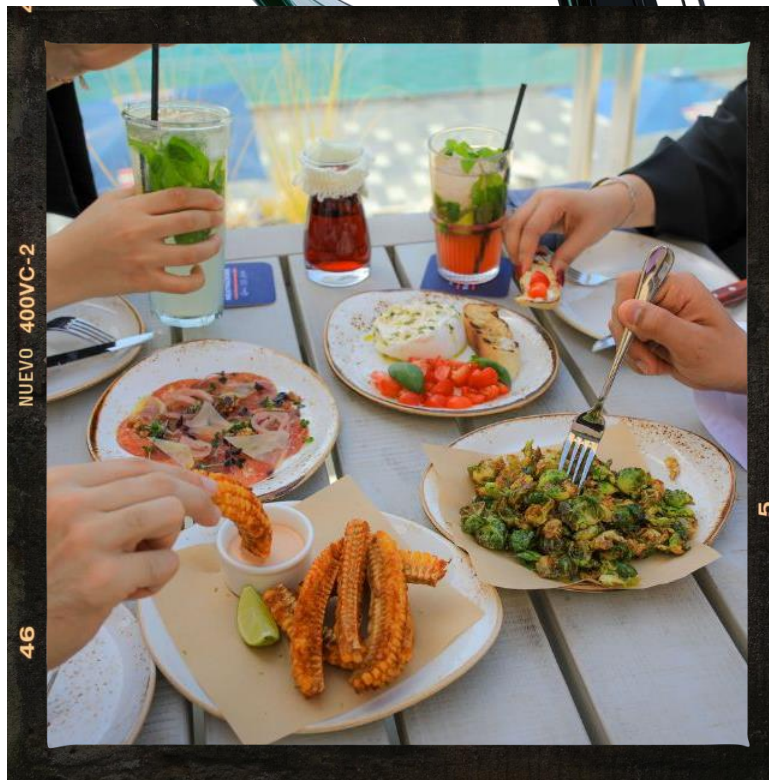
Sources: Mordor intelligence, 2025.

Specialize activity in a fast-growing, socially diverse on-trade

The on-trade spans luxury hotels, casual dining, cafés, QSRs, lounges, and food halls; each with different communities, cultural codes, and rituals.

- Dubai has 13,000 food and drink establishment, more restaurants per capita than any city except Paris. The average consumer dines out 2.5 x a week
- Dining-in accounts for 55% of 2025 foodservice market. Full-service restaurants lead with 41.55% of the total revenue, whilst QSRs are the fastest-growing segment at 19.55% CAGR

The opportunity is to use on-trade fragmentation as a localization advantage. Designing cuisine-specific pairing POS that embeds Coca-Cola into the dining ritual of each community.





hhglobal

DTMx3.0

Thank
you