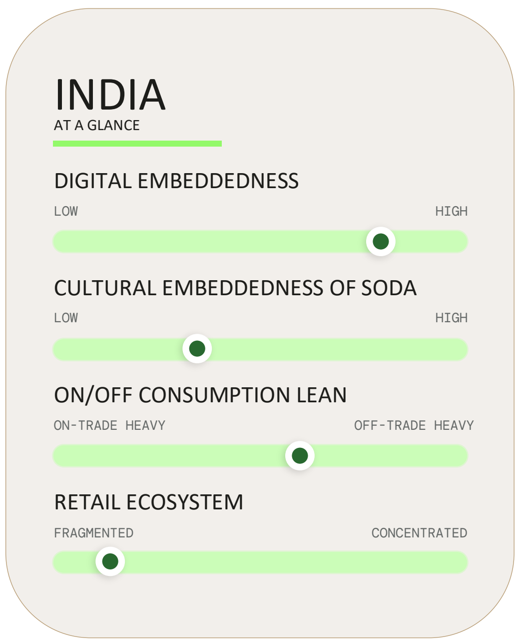
DTMx Insights—India

Creative Intelligence Approach

Cultural context

India is a market of 1.4 billion people at an inflection point. It is the world's most populous country, the 5th largest economy, and one of the fastest growing. The Indian cola market is predominantly led by three major brands: Coca-Cola, PepsiCo, and Campa. Historically, Coca-Cola and PepsiCo have maintained a duopoly, but in 2025 Campa disrupted this dynamic with an aggressive re-entrance to the Indian market. Campa's strategy centers on competitive pricing and leveraging extensive distribution networks to rapidly gain market share.



Key Cultural Distinctions for Beverage

Occasion-led, not habitual—Indians don't drink Coke every day. When they do, it's tied to heat, food, festivals, and social connection. March–July accounts for the majority of annual soft drink sales. Consumption spikes around cricket matches, Diwali, weddings, and religious gatherings.

Post-meal refresher—attempts at food pairing has had limited traction in India. Sweet, carbonated drinks are rarely consumed with meals like biryani as they disrupt the palate. Cola is more commonly consumed after eating.

The ₹10 economy—India's beverage market runs on the ₹10–20 price point. The returnable glass bottle (200ml at ₹10) drives ~70% of incremental transactions. Sachets, small-format packs, and affordability pricing dominate. Consumers buy little and often.

Young, digital, mobile-first: high tech and high touch—730+ million digital-first Gen Z and millennial consumers. India has 900+ million internet users and 500+ million smartphone users. Quick commerce (10-minute delivery via Blinkit, Zepto, Swiggy Instamart) is reshaping purchase behavior at pace. Technology is embedded in daily life, but high-touch service remains a core expectation. The urban–rural divide is increasingly blurred by connectivity: shopping malls, quick commerce, kirana stores, and WhatsApp coexist.

Cricket as religion—the IPL (March–May) perfectly overlaps with peak summer beverage season. The Narendra Modi Stadium seats 132,000. India–Pakistan matches stop the country. Cricket is the single largest activation platform for any beverage brand.

Emerging health headwind—while 52% of the market remains traditional carbonated drinks, Tier-1 consumers are increasingly opting for cans and single-serve glass bottles to better manage portion sizes and sugar intake. From March 2026, cheaper generic GLP-1s became available with prices as low as ~₹1,290 ($13) a week. This could accelerate sugar and alcohol moderation among Tier-1 urban consumers, pressuring premium cola + mixer occasions and nudging demand toward zero-sugar and smaller formats.

Tiered cities differ in frequency of cola consumption—India is a vast country with cities varying in size, infrastructure, and economic capabilities. To help streamline engagement, cities are categorized into different cities from Tier 1, the largest metropolitan cities, to Tier 4, which are towns with limited urban facilities. In Tier-1 cities, urban consumers now average 10–12 bottles per year, with **Coca-Cola** original and premium formats performing strongest. In Tier 3 and rural markets, consumption remains below 5 bottles annually but is growing faster. **Thums Up** is the primary driver of that growth.

The "Two Indias" Consumption Pattern

- **The "morning" India (mass market):** Focused on finding the cheapest hydration, this segment is where Campa is rapidly gaining share by targeting the "quick break" occasion at kirana stores. Thums Up remains the incumbent to beat in this space—it is the market leader in mass cola and the brand most consumers outside Tier 1 reach for first.

- **The "evening" India (premium) ~5%:** Centered in Tier-1 cities, cola is consumed as a mixer for alcoholic beverages or as a treat during "Experience Economy" events such as concerts and visits to malls. Coca-Cola original plays more strongly here—its global brand cachet aligns with the premium, aspirational positioning of metro nightlife and dining.

Strategy	Coca-Cola	PepsiCo	Campa Cola
Distribution	Strong presence in traditional kirana (general trade) and HORECA (Hotels/Restaurants).	Heavy reliance on Varun Beverages; focus on urban "Quick-Commerce".	Leveraging national retail chains such as JioMart and Reliance Retail's 18,000+ stores to bypass intermediaries.
Marketing	"Invest Ahead of Curve"—focus on digital-first and hyper-local advertising.	Massive celebrity and influencer tie-ups; emphasis on "snacking + cola" bundles.	Nostalgia marketing, high-profile IPL sponsorships, and regional vernacular advertisements.

Economic and Regulatory Considerations

- **Goods and Services Tax (GST) at 40% from Sept 2025**—carbonated soft drinks sit in India's highest GST bracket, classified alongside tobacco as "sin goods". Creates significant pricing pressure. Non-carbonated fruit drinks at just 5% GST. This has compelled the industry to adjust its portfolio:

    1. **The pivot to "non-sin" categories:** As fruit-based and milk-based drinks attract only 5% GST, all three players have expanded aggressively into fruit juices (Maaza [Coca-Cola owned], Slice [PepsiCo owned]) and dairy products.
    2. **Downsizing & pack-price engineering:** To maintain attractive price points (₹10 and ₹20), companies have reduced bottle sizes, for example shifting from 250ml to 200ml rather than increasing prices.
    3. **Low-sugar focus:** Firms are lobbying for a tiered sugar tax. Meanwhile, Pepsi Black and Coke Zero are heavily promoted in urban markets in anticipation of possible future tax incentives for low-sugar variants.
    4. **Campa's absorption:** Reliance's integrated retail and distribution network allows it to absorb some of the tax impact better than competitors, who must pay distributor margins. This enables Campa to maintain the industry's price floor.

- **Single-use plastic ban**—traws, cups, stirrers, polystyrene banned nationally since July 2022. PVC flex banners under 100 microns banned. Bengaluru requires biodegradable-only POS materials. Mumbai, Kerala, Karnataka, Maharashtra also restricting plastic signage.

- **State-level alcohol regulations—**Bihar, Gujarat, Nagaland, Mizoram maintain complete prohibition. Drinking ages range from 18 (Goa) to 25 (Haryana). ~25+ dry days annually. Fragments the mixer opportunity geographically.

- **FSSAI front-of-pack health labeling incoming**—draft health star system has been in place since 2022. All labels require FSSAI license numbers, nutritional info, allergen declarations, and veg/non-veg symbols in English or Hindi minimum.

- **EPR (Extended Producer Responsibility)—**30% recycled content for rigid plastics (PET) in FY 2025-26, rising to 60% by FY 2028-29. All plastic packaging must carry QR codes from July 2025.

- **Among the fastest growing major economy with FMCG uplift in rural areas—**GDP growth 7.3–7.4%. Inflation at six-year low of 1.55%. Union Budget raised tax-free threshold to ₹12 lakh. Rural FMCG volume growth hit 8.4% vs 2.6% urban.

On-Trade—Bars Restaurants Venues

What Are the Key Venues and Spaces? What POS Formats Work Here?

India’s on-trade spans traditional spaces to high end experiential—we will need to demonstrate how we can help serve and distribute a fragmented space and engage with customers in a variety of locations serving different experiences.

Neighborhood eateries and dhabas—highway dhabas, chaat stalls, biryani counters. Often family-owned and no-frills eateries.

POS formats: Branded visi-coolers, painted tin signs and wall murals, counter-top price cards, branded parasols/umbrellas, hanging signage, sticker activations, returnable glass bottle crates as exterior brand signage.

LtoR—Rajinder family-owned dhaba in New Delhi, unique place because it started as one food cart to now owning the whole square; Sri Hari Hotel and Restaurant exterior in Pipali, Puri; Sri Hari Interior; Brothers Amritsari Kulcha Hub in Chandigarh

Cafés and casual dining—relaxed and curated spaces to spend time with friends and family to eat, drink, and socialize. Thums Up + biryani and Sprite + spicy food are established pairings across menus that increasingly mix global and regional cuisines. Cafés are also spaces for students and freelancers to work

POS formats: Branded FridgesTable talkers, menu inserts, branded glassware, coaster programs, counter displays, window graphics, digital screen content, QR-activated experiences.

Kyani & Co irani café in Mumbai; Koolar and Co in Mumbai; Back to source in Chandigarh

QSR—exclusive pouring rights in Domino’s (1,700+ outlets, now holds 40% stake in HCCB). Western chains like McDonald’s, Burger King. Regional chains like Haldiram’s , Wow! Momo. Air-conditioned, standardied, app-integrated. Zomato and Swiggy have made the combo meal the default.

POS formats: Digital menu boards, branded trays/liners, counter standees, Freestyle machines, combo meal signage, delivery platform imagery.

Premium dining, hotels—white-tablecloth restaurants, five-star hotel lobbies, rooftop lounges with city skylines.


LtoR—Thackers; The LaLiT Ashok hotel in Bengaluru; Oudh 1590 Kolkata

POS formats: Bar rail mats, back-bar LED shelving, minibar cards, tray liners, glassware.

Banquets—Diwali parties on hotel lawns. Corporate galas, Navratri garba nights, Durga Puja pandal gatherings. India hosts ~10 million weddings a year—a $130 billion industry [IBEF]. Many are dry where soft drinks are a main beverage.

POS formats: Branded serving stations, large-format bottle displays, ice bucket branding, buffet counter signage, festive-themed packaging, custom label programs.

Bars, night clubs and live music—fairy-lit rooftop bars, packed DJ nights, live music venues with craft beer on tap. Concentrated in metros and Goa.

POS formats: Tap decals, bar rail mats, branded glassware, coasters, cocktail/mocktail menu inserts, back-bar LED shelving, branded ice buckets.



POS Formats On-trade

Across all venue types, India’s on-trade has an established but evolving POS toolkit driving experiential visibility.

Zone 1: Street & Traditional (Dhabas, Chaat Stalls, Highway Eateries)

POS formats: Branded visi-coolers, painted tin signs, wall murals, counter-top displays, price cards, branded parasols/umbrellas, hanging signage, sticker activations, FSUs with interchangeable headers.

Challenge: Small footprints (<500 sq ft), monsoon/dust/UV damage, intense local competition from Campa Cola and regional brands.

HH Global value: Scalable, low-cost, weather-resistant kit production. Standardied vendor kits through bottler logistics. Hindi + regional language localization across 28 states. Biodegradable material compliance as PVC flex bans expand. Non-electric and solar-powered cooling solutions for locations with unreliable electricity—an innovation opportunity to maintain cold availability where conventional visi-coolers underperform.

Zone 2: QSR & Modern On-Trade

POS formats: Digital menu boards, branded trays/liners, counter standees, Freestyle machine wraps, combo meal signage pairing food + beverage, delivery platform menu imagery & combo deal graphics.

HH Global value: Template-driven digital signage content. Campaign calendar management—seasonal materials (IPL → Diwali → New Year’s). Delivery platform asset production at scale.

Zone 3: Bars and Clubs

POS formats: Branded glassware, bar runners, tap decals, menu boards, A boards, Branded coolers , branded parasols, counter top displays, backbar, LED signage

HH Global value: Standardized bar kit production (glassware, runners, tap decals) deployed nationally with regional and language versioning built in. Campaign calendar management across festival-driven occasions flowing through the same venue base. LED and digital menu content creation as growing workstream alongside physical POS.

Zone 4: Mega-Events & Experiential

POS formats: Large-format event banners, mobile hydration stations, cooler walls (100-door world-first at Maha Kumbh), pop-up booth wraps, selfie zones, reverse vending machines, special edition packaging, event tent canopies, wristbands, social media templates.

HH Global value: End-to-end event activation production. Modular kit systems produced once, deployed repeatedly across events. Project management & logistics coordination. Reusable digital asset library reduces bespoke cost per activation.

Any Cultural Drinking/Dining Occasions That Matter for On-Trade?

India's on-trade calendar is driven by heat, sport, festival, and food ritual.

Peak Occasions

- IPL & Cricket (March–May)
- Diwali (Oct–Nov)
- Summer Heat (April–June)
- Holi (March)
- Weddings
- Maha Kumbh/Ratha Yatra/Durga Puja/Navratri/Eid
- Republic Day/Independence Day

Always On

- Food moments
- Friday/Saturday night out

Off-Trade & Retail

Retail Landscape—Who Are the Dominant Retailers? What Shelf/Display Norms Exist? What is the Convenience Store Landscape?

India's FMCG retail is highly fragmented: General trade (kirana) still accounts for the majority of sales (~70–80%) across millions of independent outlets. The balance comes from modern trade and e-commerce, with quick commerce growing rapidly within e-grocery. The shelf norms, display mechanics, and rules of brand visibility are fundamentally different in each.

General Trade—Kirana Stores

The cornerstone of India's general trade sector is made up of 12–13 million kirana stores. These are small family-owned shops (100–500 sq ft) that sell packaged food, snacks, household items, and beverages, with many also serving freshly cooked food.

Owned/low-rent stores, family-managed, rapid inventory cycles. Small sales value.

Display/Shelf/POSM norms:

- Branded visi-coolers—beverage companies often place and brand fridges; strict blocking/planogram expectations; competitor products may be restricted where enforcement exists
- Crowded counter space
- Low shelf depth; vertical stacking is common
- "Behind-the-counter" storage
- High clutter tolerance; small-format POS wins—wobblers, shelf strips, danglers, price cards, and small tent cards outperform large fixtures in tight stores, danglers, door decals
- Exterior visibility— shutters, fascia boards, painted signage, A boards, umbrellas, and crate stacks act as street-facing cues
- QR code stickers
- Unreliable electricity—in semi-urban and rural areas, power outages limit visi-cooler effectiveness. Many stores rely on insulated ice boxes or ambient stacking as a workaround. Solar-powered and non-electric cooling solutions represent an untapped opportunity for maintaining cold availability

Kirana visibility is won through using **small, durable, price-led POSM** and defended cold-space/counter positions. Disposable POS materials turn over fast in this environment—Campa, regional brands, and competitors are constantly vying for the same limited counter and wall space. Scalable, low-cost disposable kits that can be refreshed frequently are essential to maintaining presence against this competitive churn.

Wine Shops (Liquor Stores)

India's wine shops—the common term for neighborhood liquor stores—are a distinct general trade format and a high-frequency touchpoint for cold drinks and mixers. State-licensed and independently operated, these are counter-service outlets with no browsing: customers order at a window or counter and leave. They cluster in small towns, semi-urban areas, and along highways, often adjacent to dhabas and kirana clusters.

Thums Up and soda are the default mixer accompaniments—bought alongside spirits as part of the same transaction. In many locations, drinking happens on the spot or nearby (in a car, on the pavement, at an adjacent dhaba), making wine shops a significant away-from-home consumption point that sits outside traditional on-trade.

Display/Shelf/POSM norms:

- **Counter-service format**—extremely limited space; all POS must fit at or behind the counter window.
- **Cooler-dependent**—a branded visi-cooler or ice box is the primary visibility asset; cold availability is the purchase trigger.
- **Counter-top signage**—small price cards, stickers, and wobblers are the only viable disposable POS formats given the tight footprint.
- **Exterior branding**—painted signs, fascia boards, and shutter graphics where state regulations permit.

Wine shop visibility is won through **cooler presence + counter-top positioning**, reinforced by proximity to the spirits transaction. Mixer-occasion messaging (Thums Up + whisky, soda + rum) can be more explicit here than in kirana stores.

Paan Shops & Cigarette Kiosks

Paan shops and cigarette kiosks are among the highest-velocity cold drink points in Indian general trade. Tiny footprints—often just a counter and a cooler—but extremely high footfall, open late, and embedded in the rhythm of daily life across every tier of city and town. They operate alongside kiranas but behave differently: transactions are faster, more impulsive, and more tightly linked to heat, thirst, and mixer occasions. A customer buying cigarettes or paan grabs a cold Thums Up or soda on the same stop.

Display/Shelf/POSM norms:

- **Visi-cooler as primary asset**—the cooler is often the only branded presence; cold availability drives the sale.
- **Minimal counter space**—stickers, small price cards, and dangler strips are the only viable disposable POS. No room for standees or large fixtures.
- **Late-night and evening skew**—paan shops stay open later than most kiranas, making them a key touchpoint for evening and nighttime impulse and mixer purchases.

Paan shop visibility is won through **cooler placement + high-frequency disposable POS refresh**. The sheer volume of these outlets and the speed of transactions make them a high-impact, low-cost activation channel—particularly for Thums Up and soda in small towns.

Medical Stores (Pharmacies)

India's neighborhood pharmacies increasingly host small coolers stocking cold drinks and water.

POSM here is minimal—a branded cooler and possibly a counter sticker. The value is less about activation and more about **distribution depth and ambient brand presence** across the widest possible range of general trade touchpoints.

Modern Trade

India's modern trade is dominated by Reliance Retail (19,340+ stores across 1,800+ cities, ₹3.3 lakh crore gross revenue). Reliance also absorbed Big Bazaar (200+ stores rebranded Smart Bazaar).

DMart operates 461 stores with ₹57,790 crore revenue. Spencer's Retail (~120 stores) focuses on East India. Organized/modern trade remains a minority share nationally but is materially higher in metros.

Shelf & Display Norms:

- Standardized gondola shelving
- Chiller units along back or side walls—maximum footfall routing before checkout
- End-cap displays
- Shelf talkers, wobblers, and hanging banners
- Pallet displays
- Checkout/impulse zones— single-serve packs and promo bundles feature at checkout lanes, queuing rails, and service counters.
- Clip strips and side-kicks extend shelf space—hanging/side fixtures on gondolas create incremental facings for small packs and limited-time offers.
- Shelf-edge labels (SEL) and promo price cards
- Dedicated promo bays
- Category adjacencies— water near snacks/ready-to-eat; mixers near spirits; refrigeration often grouped by need-state rather than brand.
- Store formats create different execution rules—hypermarkets allow larger stacks and pallet islands; supermarkets and premium stores prioritize clean sightlines and smaller POSM.

Modern trade visibility is won through **planogram compliance + paid secondary placements** (end-caps, promo bays, checkout), supported by **promo-calendar execution** and **on-shelf availability**.

What Does At-Home vs. Away-from-Home Consumption Look Like?

Off-trade consumption is dominantly impulse and on-the-spot. Big shops and stock-ups are less likely. Soda is a celebration and a treat drink, not a pantry staple.

At-Home Consumption

- Festival celebrations—Diwali, Eid, Navratri, Pongal. Large-format bottles, communal serving
- Sports watching at home
- Family meals

Away-From-Home Consumption

- Heat-driven impulse—thirst-quenching single-serve cooler grab at kirana or dhaba
- Work lunch
- Mall shopping
- Travel occasions—highway dhabas, railway stations, airports
- Wine shop mixer occasions—cold drinks purchased alongside spirits at neighborhood liquor stores, consumed on the spot or nearby

Merchandise and Collectibles

Note: *Branded merchandise and collectible activations in India skew heavily toward on-trade, premium, and metro contexts—stadiums, experiential events, upscale dining, and Tier-1 retail. In the off-trade general trade environment (kirana, wine shops), branded merch risks margin conflict and doesn't match the purchase occasion. Off-trade POS should prioritize functional visibility (cooler branding, price cards, counter displays) over merchandise-led activation.*

Are There Any Viral/Culturally Relevant Products?

Traditional Toys

India's "Vocal for Local" movement has revived interest in heritage toys like Channapatna, Kondapalli, and Thanjavur dolls. These are culturally unique to India and have no global equivalent.

Animé Pop Culture

India has a massive animé fanbase. Retailers like Blue Balloon Toys, FatCat Collectibles are capitalizing on Funko Pop!, Banpresto, and premium figures. This mirrors UK/U.S. pop culture merchandise trends**.**

Blind Box Collectibles

Sealed packages containing a random figurine from a specific themed series, offering the thrill of surprise and a "chase" for rare items. Popularized by brands like Pop Mart, these items tap into nostalgia and the dopamine-driven joy of unboxing, allowing collectors to trade or collect full sets of vinyl toys, designer figures, or popular characters. TikTok driven.

Cricket Merchandise

IPL Team Collectibles like Team jerseys, caps, memorabilia, player autographs from Indian Premier League teams

Streetware/Sneakers

"Desi twist" on global sneaker culture.

Phone Customization

Phone cases, tassles, stands and straps.

Are There Any Collaboration Trends?

Coca-Cola x Food Culture

- "Coke is Cooking" festivals—launched globally from Kolkata during Durga Puja 2022. Expanded to Delhi (50+ food stalls, Prateek Kuhad, Nucleya, Sourav Ganguly appearance). Pairing Coke with regional cuisines.
- Thums Up x Biryani—"Toofani Biryani Hunt" web series with Chef Ranveer Brar. Shah Rukh Khan endorsement. 91.3M biryani orders on Zomato in 2024.
- Diljit Dosanjh x Coca-Cola—leveraging pop-culture charm. Explicit food pairings: chole bhature, pizza, everyday meals.

Coca-Cola x Cricket & Sport

- ICC Official Non-Alcoholic Beverage Partner. IPL team partnerships: CSK, KKR. Sprite x LSG
- "Halftime" campaign: QR codes during India-Pakistan Champions Trophy for half-price Coke
- Campa Cola x IPL 2025—₹200 crore co-presenting sponsorship. Reliance leveraging cricket platform + retail network for aggressive market entry

Coca-Cola x Religious & Cultural Events

- **Maha Kumbh 2025**—1,400 hydration stations, 100-door cooler wall (world first), 180M+ servings, special edition packaging, "Maidaan Saaf" sustainability campaign (Discovery+ documentary), 21,500 recycled PET jackets for sanitation workers.
- **Ratha Yatra 2025**—special edition Kinley packaging with Odisha cultural motifs, cooler walls along temple routes, 200 PET collection bins.
- **Diwali packaging**—diya and rangoli designs on bottles. 2022: Bluetooth-enabled bottles requiring physical proximity. "Milke hi Manegi Diwali" campaign.