



COCA-COLA FLORIDA?

Bottle Beverages Program



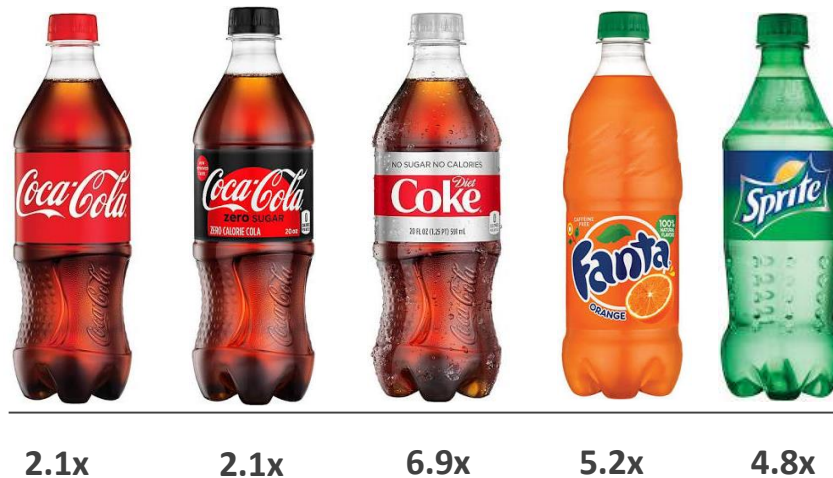
OUR VALUE PROPOSITION

Portfolio of Desirable Brands

**BEST COLA
BRAND TO
SERVE WITH
FOOD**

As your beverage partner, Coca-Cola is committed to providing industry-shaping leadership. Here's why guests and foodservice operators prefer Coca-Cola brands:

FAVORITE BRAND VS NEAREST COMPETITOR



Source: Coke Florida "Are We Winning" Nielsen YTD through April 2019.

Brand preference among consumers can drive higher beverage incidence and increase profits.



Foodservice outlets choose to pour Coca-Cola Brands



Coca-Cola's portfolio has a +5.7% incidence advantage over nearest competitor



Our brands lead the sparkling and still categories, driving your beverage sales

ENHANCES THE TASTE OF FOOD



Goes well with spicy food



Goes well with healthier meals



Goes well with hamburgers



Goes well with pizza



Goes well with chicken



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WHY BOTTLES?

- Bottled beverages maximize sales and profits by capturing more beverage occasions with a broader brand and package mix
- Help your customer target the 60% of to go occasions where consumers don't buy a beverage with their food
- Bottles offer take-out consumers the convenience of resealable packaging for better portability
- Bottles deliver higher margins with higher suggested retail pricing than fountain
- New equipment designs reduce the space needed to effectively merchandise and sell bottles
- Bottled water has become a major category in QSR's. Offering branded water has proven to be a significant incidence builder.



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Restaurant Delivery Intermediaries

RDIs & Beverages



Every bottle beverage sold helps cover the commission paid to the delivery companies



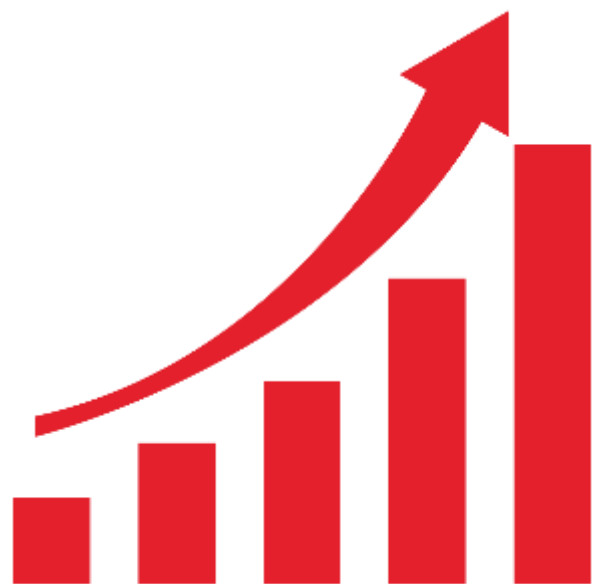
RDI Profit Advantages

- Introduce bottles (delivery-ready assortment) into outlets that are currently fountain only
- Bottles can deliver high margins, with minimal operational challenges
- Profits from selling bottles for delivery can help offset the commissions paid to RDI's**
- It's proven that beverage sales are a business opportunity for restaurants...yet only 42% of delivery transactions include a beverage
- Bottles reduce the operational costs associated with delivery
- Bottles offer takeout consumers the convenience of resealable packaging
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MARKETPLACE	CONSUMER	CUSTOMER	PRODUCTS
<p>\$83B Business by 2020; +33% vs. 2015</p> <p>Top 5 Players</p> <ul style="list-style-type: none"> Grubhub: \$3,717M; 41% share Postmates: \$980M; 11% share Uber Eats: \$923M; 10% share Door Dash: \$818M; 9% share Amazon: \$629M; 7% share <ul style="list-style-type: none"> Service offerings different across players Frequent acquisitions 	<p>1 in 3 Millennials say they use delivery more than once a week</p> <p>Consumers looking for:</p> <ul style="list-style-type: none"> Menu variety/customization Late night hours & availability Seamless & frictionless mobile/desktop experiences <p>60-80% of Delivery transactions DO NOT include a beverage</p>	<p>Benefits:</p> <ul style="list-style-type: none"> 45% of RDI orders are from small or independent restaurants Opportunity to remain competitive & expand consumer reach through incremental occasions Offers higher average ticket ring <p>Disadvantages:</p> <ul style="list-style-type: none"> On Premise traffic down Significant commission fees Pressure for fast delivery times Operational challenges 	<p>Fountain products pose challenges for delivery purposes</p> <p>Ice Melt</p> <p>Spillage</p> <p>Right delivery assortment optimizes the transaction & consumer experience</p>

What is the size of the 3rd Party Delivery Opportunity?

Online food **delivery is growing rapidly** across the U.S.



\$22B in revenue by 2022

In 3 years, food delivery could account for **7.4%** of total restaurant sales

Delivery transactions have a **higher average ticket** before delivery fees compared to other restaurant occasions

7.4%

**FOOD
DELIVERY**

\$\$\$

+

3rd party delivery is expected to **contribute over 30%** of the total restaurant industry growth over the next few years

In the last year, 3rd Party delivery partners have seen a **+38% traffic growth**

Source: Morgan Stanley Research (left) | Source: Company Data, Morgan Stanley Research (right)
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FLORIDA



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TOOLS TO FUEL YOUR GROWTH

THE RIGHT
TOOLS TO
HELP DRIVE
REVENUE &
GROWTH

RDI Profit Advantages

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helps cover the commission paid
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Restaurant Delivery Intermediaries

RDIs &
Beverages



GRUBHUB™

seamless

DOORDASH



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2020 Distributor Portfolio Overview

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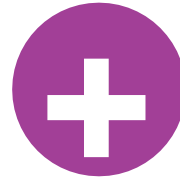
CORE



ALWAYS

have these core PET 20oz
and products

EXPANDED



SPARKLING FLEX



PREMIUM/IMPORTS



STILL FLEX

Having the right assortment for the customers

BOTTLE MERCHANDISING ELEMENTS FOR ALL OCCASIONS



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