

Growing Coca-Cola's healthy portfolio in Indonesia

Slide deck by Toh Yu Heng, October 2026

Growing Coca-Cola's Healthy Portfolio in Indonesia

Three growth gaps, a gated US\$10M plan to close them, and the social post we publish next

EXECUTIVE SUMMARY

Close three gaps with a gated US\$10M plan; first post: “Makan pakai Zero”

SITUATION

Indonesia is Southeast Asia’s largest consumer market [1], but soda is occasional: 11 servings a person a year against 172 in the Philippines [2]. Zero-sugar variants (Zeros) rose from 3% to 7% of our sparkling mix [3].

DIAGNOSIS: THREE GAPS

Moment: Zero is missing when Indonesians drink soda.
Shelf: Zero seems hard to find cold outside modern trade (to confirm with CCEP data).
Trust: shoppers doubt sweeteners; Powerade has no credible reason to buy.

WHO

Soda drinkers aged 18–35 in five cities (Zero); runners and court players (Powerade); tea and juice buyers (capped test).

CHANNELS

Creators 30% · delivery apps 24% · on-ground moments 21% · shelves and venues 17% · TV 0%: US\$2M a year is 0.03% of the ad market [4].

Q1 · HOW THE US\$10M IS USED

	Play	US\$M	Lead KPI, 2031
1	Put Zero in soda moments	3.4	+3 pts share vs holdouts
2	Put Zero within reach, with CCEP	2.2	20,000 outlets cold
3	Credible voices for Zero and Powerade	1.8	Powerade index 15+
—	Facts first for tea and juice (capped)	1.0	Fretea index 15, from 10
	Foundation: TikTok, tracker, reserve	1.6	Cost per new buyer
	Total, 2027–2031	10.0	58% on Zero

A US\$1.6M test in 2027 gates scale-up; at scale the base case breaks even (1.0×).

Q2 · SOCIAL PRESENCE AND THE NEXT POST

Our three portfolio Instagram accounts have 174K followers to Aqua’s 303K, and we have no active TikTok [5]. Next post, 7 Dec 2026: “**Makan pakai Zero**” (eat with Zero), a TikTok meal moment with a GrabFood code that claims one fact, “0 g gula”, with the sweetener disclosed.

DECISIONS NEEDED

Approve US\$1.6M for 2027 · agree CCEP co-funding · approve an official TikTok and claims rules · brief R&D to bring more Fretea under the Nutri-Level B line

[1] BPS, SUPAS 2025 (284.7M people); by revenue the Philippines is 5.8× larger (CCEP, FY2025) · [2] CCEP, Capital Markets Event, May 2025 · [3] CCEP, FY2025 call (period and base not stated) · [4] We Are Social, Digital 2026 · [5] Social Blade, 18 Oct 2026

HOW THE DECK ANSWERS THE BRIEF

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THE BRIEF ASKS	SLIDE
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CALP: clarify and contextualise, analyse, list solutions, prioritise. Evidence: Coca-Cola filings and calls, Indonesian surveys, 19 social accounts, 477 forum comments, 13 analogue cases. “Brief” marks the project brief’s scenario figures (Appendix E).

01

Clarify and contextualise

The goal is more buyers. Soda is an occasional drink in Indonesia, and Zero already sells where it is stocked.

01 Clarify and contextualise	02 Analyse	03 Q1 · How the US\$10M is used	04 Q2 · Social presence and the next post
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01 · CLARIFY THE QUESTION

Success means more buyers for four brands, claimed on label facts only

1 · What counts: the brief’s “healthy portfolio”, defined by label facts [1] [2]

Product	Sugar/100 ml	Sweetener	Nutri-Level*	Label fact we can claim
Ades water†	0 g	None	A	0 g sugar
Zero Sugar, Sprite Zero, Fanta Zero	0 g	Artificial	C	0 g sugar, with the sweetener disclosed
Powerade Active Blue, Active White	3.2 g	Sugar and artificial	C	Electrolytes; sweetener disclosed
Fretea range	6.0–9.2 g	Sugar; some with stevia	B–C	Real tea; sugar in grams (Melati 6.0 g)
Minute Maid Pulpy Orange	9.0 g	Sugar	C	Vitamin C, 25% of daily value a bottle
Coca-Cola Original (reference)	10.8 g	Sugar	C	Reference only: the same C grade as Zero

*Indicative grade: A ≤0.5 g, B ≤6 g, C ≤12.5 g sugar per 100 ml; artificial sweeteners cap a drink at C. †Ades is not on the brand pages; values assume plain mineral water, to check on pack.

2 · What growth means

Servings = buyers × servings per buyer. Zeros are 7% of our sparkling mix, up from 3% [3]. By 2031: Zeros at 15% of sparkling, Powerade in the Top Brand Index, Fretea’s score from 10 to 15, and the spend repaid at scale.

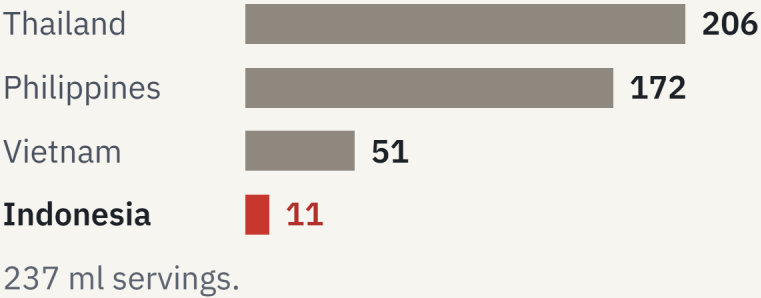
3 · What the budget can buy

US\$2M a year is **0.03%** of Indonesia’s US\$7.0bn ad market [4]: too little for mass awareness. **We control** messages, activation, creators, digital commerce and trade funds; **CCEP**, our bottler, controls price, packs, outlets and coolers; **R&D** controls recipes.

[1] Coca-Cola Indonesia brand pages, 18 Oct 2026 · [2] BPOM Reg. 10/2026, via BPOM, Jul 2026; Cekindo, Sep 2026 · [3] CCEP (Coca-Cola Europacific Partners), FY2025 call, Feb 2026 · [4] We Are Social, Digital 2026

Indonesians drink water and tea; soda is an occasional drink that people cutting sugar drop

Sparkling servings per person a year, 2024 [1]



66%

of ready-to-drink volume is water [1]

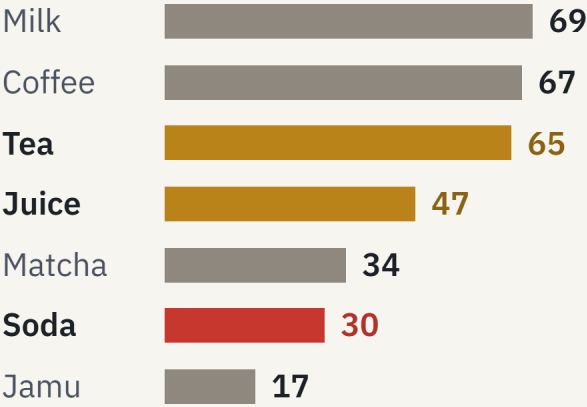
+1.8%

industry growth in Q3 2025, year on year, all of it from bottled water [2]

47%

of Indonesians almost never drink soft drinks (c. 2019) [3]

Gen Z who drink each often, % [4]



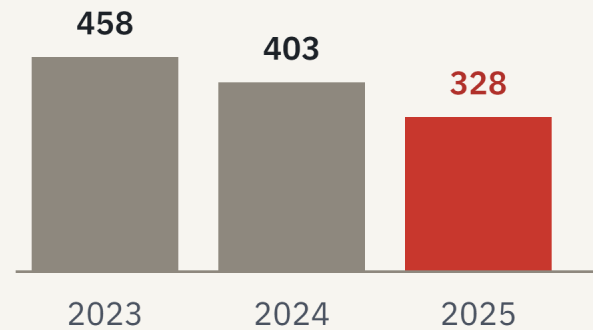
n≈520. Red: Zero’s pool; amber: Frestea’s and Minute Maid’s.

So what: soda is a small, occasional pool, so Zero must grow inside existing soda moments. Tea and juice are everyday pools where our brands are small.

[1] CCEP, Capital Markets Event, May 2025 · [2] ASRIM via Bisnis.com, Dec 2025 · [3] YouGov, c. 2019 · [4] Jakpat (fieldwork Apr 2026) via GoodStats, Jun 2026. Brief scenario data: Southeast Asia’s ready-to-drink market, US\$61bn (2024) to US\$82bn (2030).

Bottler revenue fell 28% in two years; Zeros grew to 7% of sparkling

Bottler revenue,
Indonesia, €M [1]



-28% in two years; H1 2026 volume up mid-single digits, revenue flat at constant currency [2]. The Philippines earned 5.8× more (€1,890M) [1].

What the bottler says went wrong

Weak consumer. FY2025: a “weaker consumer & macroeconomic backdrop” [1]; “affordability is more important than ever” (May 2025) [3].

Boycott. Hit modern trade hardest in Q2 2024 [3]; behind a €175M impairment [4]; last cited in H1 2025 results [5].

Reach. CCEP serves ~400K of ~4M outlets [3]; a distributor model replaced direct delivery by end-2025 [1].

SKU reset. ~60% of SKUs cut by end-2023 [6].

3% → 7%

Zeros’ share of our sparkling mix, as reported for 2025 [7]

>30%

of our soft-drink mix in modern trade is Zero [3]

12 → 10

Frestea’s Top Brand Index score, 2024–26; RTD tea is “in decline” and juices drove Q1’s dip [2] [8] [9]

So what: Zero already sells where it is stocked, so the plan builds on it. Elsewhere others lead (Top Brand Index: Aqua 43 vs Ades 7; Teh Pucuk 33 vs Frestea 10; Pocari 56, Powerade unlisted); Frestea Green Tea, up from 22 to 31 and second in green tea, is our one rising tea score [9].

02

Analyse

Three gaps block growth: Zero is missing from soda moments and seems hard to find cold, and neither its sweeteners nor Powerade have a credible voice.

01	02	03	04
Clarify and contextualise	Analyse	Q1 · How the US\$10M is used	Q2 · Social presence and the next post

We target adults who already drink soda, tea or juice, plus active movers for Powerade

PRIMARY · ZERO

Occasional soda drinkers, 18–35

Who: urban adults in Greater Jakarta, Surabaya, Bandung, Medan and Makassar.

Why: no new habit needed; 30% of Gen Z and 33% of Millennials drink soda often [1], and they are 49% of Indonesians [2].

When: bukber, meals, nongkrong, football nights.

SECONDARY · POWERADE

Active movers

Who: runners, gym-goers, padel and futsal players.

Why: 558+ running events listed for 2025, up from 458 [3]; ~31K ran the Jakarta Marathon [4].

Voice: coaches and sports doctors.

SELECTIVE · TEA AND JUICE

Young workers' breaks and meals

Who: 18–35s who already buy packaged tea or juice; Frestea's 2025 relaunch targets young professionals [5].

Why: 75% of Millennials drink tea often, 54% juice [1].

NOT TARGETED, AND WHY

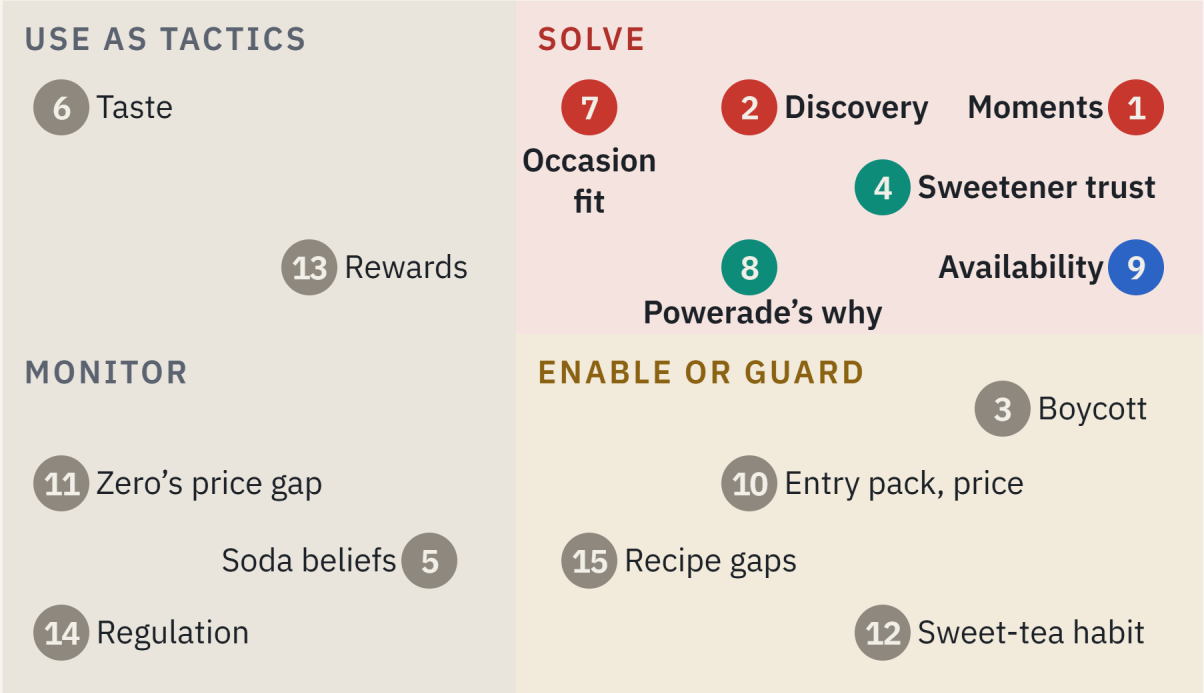
Health-minded non-soda drinkers: they choose water, not Zero · **water-only buyers:** Ades would fight a price war against Aqua and Le Minerale ·

mothers and children: all marketing is 18+ · **adults managing diabetes:** reached through professionals, not ads · **rural mass shoppers:** reached through CCEP availability

[1] Jakpat via GoodStats, Jun 2026 · [2] BPS via Databoks, 2025 · [3] GNFI, Nov 2025 · [4] Investortrust, 2025 · [5] Coca-Cola Indonesia, Frestea release, Sep 2025

Six of 15 levers, in three gaps, are big and movable with our budget

↑ How far US\$2M a year can move it (scored 1–5)



How strongly the evidence says it blocks growth (scored 1–5) →

SOLVE: THE THREE GAPS

1 · Moment gap

Zero is absent when Indonesians drink soda (levers 1, 2, 7)

2 · Shelf gap

Zero seems hard to find cold outside modern trade (9)

3 · Trust gap

Shoppers doubt Zero's sweeteners; Powerade has no credible reason to buy (4, 8)

SET ASIDE, AND HOW

Taste (6): sample inside moments only

Price (10–11): ask CCEP for packs; no discounts

Boycott (3): local proof, no politics

Beliefs, palate (5, 12): lead with label facts

Rewards (13): trial triggers only

Rules, recipes (14–15): monitor; brief R&D

Team judgement: each lever scored 1–5 on both axes (Appendix B). Levers follow the purchase funnel: notice 1–2, accept 3–5, want 6–8, find and afford 9–11, repeat 12–13, context 14–15.

Zero is missing from Indonesia's soda moments

>2×

Coca-Cola's Ramadan volume against an average month; Fanta, not Zero, leads it [1]

0

mentions of Zero in our 69,000-moment Ramadan 2026 programme [2] and in Share a Coke 2025 [3], though sparkling, led by Zero and Fanta, grew over Ramadan [4]

0 of 4

Zero campaigns in 2023–24 built on a meal or Ramadan; all four were launch or novelty plays (#ZeroWords, Riot Games, AI “Y3000”, K-pop) [6]. Soda goes with food and company: “once a month, only with Popeyes” [5]

84.8%

of Gen Z first discover trends on TikTok [7], where we found no official Coca-Cola Indonesia account [8]

Why it ranks first. Soda is occasional, so each soda moment is a rare chance to win a buyer.

What must be true. Zero is the visible, cold default at bukber, meals out or delivered, nongkrong and football nights.

Counter-evidence. At iftar only 7.9% name a packaged drink as their favourite to break the fast [9].

How we will know. Zero's share of sparkling over Ramadan, pilot cities against holdout cities.

[1] CCEP, Meet the markets, 2023 · [2] Coca-Cola Indonesia, Ramadan release, Mar 2026 · [3] Share a Coke release, Apr 2025 · [4] CCEP, Q1 2026 · [5] r/indonesia, Jun 2025 · [6] IndoTelko; MerahPutih; coca-cola.com/id, 2023–24 · [7] Jakpat, Aug 2026 · [8] Social Blade, Oct 2026 · [9] GoodStats, Mar 2026

Zero sells where it is stocked; outside modern trade and online we found no evidence it is stocked

>30%	of our modern-trade soft-drink mix is Zero [1]
~400K	of ~4M outlets are served by CCEP; ~70% of market volume runs through warungs and other general trade [1] [3]. Brief: 55% of our sales
0	general-trade channels named in the 2023 Zero relaunch, which listed only modern trade and online [2]; no general-trade figure for Zero is published
+30%	Sprite sales on GrabMart from one GrabAds campaign [4]: quick commerce works as a chilled shelf. Brief: our digital share is 11%

Why it ranks second. A moment campaign fails if the shopper cannot find Zero cold nearby. Le Minerale used Mayora's distribution and Teh Pucuk its value per bottle, both with heavy advertising [5].

What we fund. Zero-first chiller strips and shelf kits, retailer rewards, quick-commerce listings and vouchers. CCEP supplies the coolers.

What CCEP must do. Stock Zero in priority outlets and affordable packs; its 1L price cut from Rp15,000 to Rp10,000 brought double-digit growth [1].

How we will know. CCEP outlet data confirms the gap before Play 2 scales; then Zero cold in 20,000 priority outlets, sales against control outlets.

[1] CCEP, Capital Markets Event, May 2025 · [2] Coca-Cola Indonesia, Zero relaunch release, Mar 2023 · [3] CCEP Indonesia website, Oct 2026 · [4] Koran Jakarta, Jul 2026 · [5] Warta Ekonomi, 2018; UKM Indonesia, 2024. Modern trade: supermarkets and minimarkets; general trade: warungs and small shops.

Shoppers doubt sweeteners, and Powerade has no credible reason to buy

C or D	the Health Minister’s grade for artificial sweeteners [1]; the ministry named acesulfame-K, one of Zero’s two sweeteners, in a 2023 caution [2]
C	Zero’s indicative Nutri-Level grade, the same as full-sugar Original at 10.8 g [3]
12	forum comments link sweeteners to diabetes, cancer or kidneys, the most frequent health theme in our scan: “Can I get diabetes from Coke Zero?” “Yup. You can.” [4]
1	expert voice for Powerade so far: a clinical nutritionist at the May 2026 launch [10]; no organic consumer talk since [4]
77%	rank medical specialists’ advice the top influence on wellness purchases [8]; Pocari built its lead through healthcare workers in the 2010 dengue outbreak [6]

What must be true. Every brand claims label facts only: Zero’s 0 g sugar with the sweetener disclosed, Pulpy’s vitamin C, Frestea’s real tea. Never “healthy” or “low sugar”. Experts explain in general; they never appear with the product.

Powerade. Needs coaches and sports experts at the moment of need. Pocari leads isotonics with a Top Brand Index score of 56 [7]; the category is held back by “brand scarcity and consumer misconceptions” [9].

Context. 42% avoid artificial preservatives or colourings; 36% choose low-sugar [5]. **Brief:** only 18% link Coca-Cola with health.

How we will know. Tracker trust score; Powerade consideration and Top Brand Index score.

[1] iNews, 22 Jun 2026 · [2] Antara, 16 Jul 2023 · [3] BPOM Reg. 10/2026, via Cekindo, Sep 2026 · [4] Team scan of 477 r/indonesia comments, Oct 2026 · [5] Populix via GoodStats, Dec 2025 · [6] CNN, c. 2020 · [7] Top Brand Index 2026 · [8] NIQ, Jul 2025 (Indonesian results) · [9] Euromonitor, Nov 2025 · [10] Selular.id, 21 May 2026

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02 · ANALYSE · WHICH CHANNELS

Spend follows the path to purchase: TikTok to discover, delivery apps to buy, chillers to find it cold; no TV

Channel and its job	Evidence	Verdict	Share
TikTok and Instagram creators be noticed (gap 1); expert voices (gap 3)	TikTok reaches 180M adults [1]; 84.8% of Gen Z find trends there [2]; no official Coca-Cola Indonesia account [3]. Brief: 82% of Gen Z find new drinks online	Discover	30%
Food delivery, quick commerce buy in the moment (gaps 1, 2)	Sprite +30% on GrabMart [4], the only published delivery-app case, so Grab first, GoFood and ShopeeFood next; online FMCG spend +60% in Ramadan 2026 [5]. Brief: e-commerce is 13% of our sales, doubling by 2028	Convert	24%
On-ground moments bukber, nobar, run clubs, office breaks (gaps 1, 3)	Ramadan volume is more than double an average month [6]; 558+ running events listed for 2025 [7]	Activate	21%
Stores and venues minimarkets, warungs, gyms: be found cold (gap 2)	Zero is >30% of our modern-trade mix; general trade is ~70% of market volume [8]; 45K+ Alfamart and Indomaret stores [9]	Stock: 20,000 priority outlets	17%
TV and mass outdoor mass awareness	US\$2M a year is 0.03% of a US\$7.0bn ad market [1]: too thin to register	Out	0%

Share of the US\$10M by activity (slide 18); measurement 6% and reserve 2% make up the rest. [1] DataReportal and We Are Social, Digital 2026 · [2] Jakpat, Aug 2026 · [3] Social Blade, Oct 2026 · [4] Koran Jakarta, Jul 2026 · [5] Worldpanel, Ramadan 2026 · [6] CCEP, Meet the markets, 2023 · [7] GNFI, Nov 2025 · [8] CCEP, CME, May 2025 · [9] Katadata; Fortune IDN, 2026

03

Q1 · How the US\$10M is used

Three plays close the gaps and a capped fourth tests tea and juice. Three gates release the money, starting with a US\$1.6M test in 2027.

01	02	03	04
Clarify and contextualise	Analyse	Q1 · How the US\$10M is used	Q2 · Social presence and the next post

03 · Q1 · LIST THE OPTIONS, THEN RATE THEM

Twelve options pass the ratings; TV, discounts and four others fail

Kept option	Gap	Impact	Ready	Value	US\$M	Play
Ramadan bundles, iftar sampling	1	High	High	Med	1.3	P1
Meal bundles on delivery apps	1, 2	High	High	High	0.7	P1
Moment creators and boosting	1	High	Med	High	1.1	P1
Nongkrong and football sampling	1	Med	High	Med	0.3	P1
Chiller strips, shelf kits, 20,000 outlets	2	High	Med	Med	1.2	P2
Quick commerce and vouchers	2	Med	High	Med	1.0	P2
Expert creators; general label-reading	3	High	Med	High	0.8	P3
30 run-club partnerships	3	Med	High	High	0.6	P3
Race zones, venue visibility	3	Med	Med	Low	0.4	P3
Fretea meal and break moments	–	Med	High	Med	0.4	P4
Vitamin C and real-tea facts	–	Med	High	High	0.3	P4
Fretea, Pulpy chilled in minimarkets	–	Med	Med	Med	0.3	P4

DID NOT MAKE THE CUT

Blind-taste challenge: taste ranks low (6)

National TV: US\$2M a year buys too little

Deep discounts: price ranks low (10–11)

Loyalty app: rewards only trigger trial (13)

“Healthy” claims: doctors and the state object

Celebrity, race title: costly; Pocari owns races

HOW THE MONEY IS SIZED

Ratings set priority; unit cost × reach sets size. Meal bundles rate highest but run on Rp5,000 vouchers, so US\$0.7M buys 2.0M of them plus delivery-app ads. CCEP co-funds Play 2. Plays 3 and 4 face strong leaders: capped, reviewed at end-2028, and funded partly by trimming weaker options (US\$0.8M) and the reserve (US\$0.2M; Appendix D).

Team judgement against the gaps and Appendix F unit costs. Impact: effect on the gap; Ready: launchable in 2027 with our own resources; Value: new buyers per dollar; –: outside the three gaps; (n): lever on slide 10. The US\$1.6M foundation is not rated.

58% of the US\$10M backs Zero; Powerade and tea and juice are capped

PLAY 1 · US\$3.4M Put Zero in soda moments Zero · gap 1 Ramadan “Bukber pakai Zero”: bundles, iftar sampling1.3 “Makan pakai Zero” meal bundles on delivery apps0.7 Nongkrong and football-night sampling0.3 Moment creators and boosting1.1 Lead KPI: +3 pts zero-sugar share vs holdout cities	PLAY 2 · US\$2.2M Put Zero within reach Zero · gap 2 · CCEP co-funds and supplies coolers Zero-first chiller strips, shelf kits, retailer rewards, 20,000 outlets1.2 Quick-commerce listings, retail media, vouchers1.0 Lead KPI: Zero cold in 20,000 priority outlets	PLAY 3 · US\$1.8M Credible voices for Zero and Powerade Gap 3 · Zero label-reading, Powerade Dietitian on reading labels, general0.2 Sports-expert creators0.6 “Lari bareng”: 30 run clubs0.6 Cool-down zones, 4 races a year0.2 Signage in 200 gyms, courts0.2 Lead KPI: Powerade Top Brand Index 15+	PLAY 4 · US\$1.0M Facts first for tea and juice Fretea, Minute Maid · capped test outside the gaps “Rehat dulu”: Fretea lunch bundles, desk breaks0.4 “Jam tiga sore”: Pulpy’s vitamin C; real-tea facts0.3 Fretea, Pulpy chilled in 5,000 minimarkets0.3 Lead KPI: Fretea Top Brand Index 15, from 10
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FOUNDATION · US\$1.6M	Official TikTok and Instagram with listening 0.8 · tracker, geo tests, interviews 0.6 · reserve 0.2
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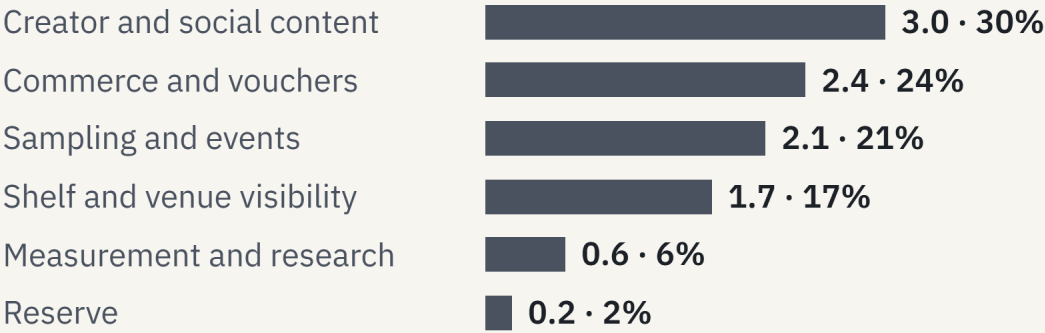
US\$M, 2027–2031; ratings on slide 16, unit costs in Appendix F, glossary in Appendix I; US\$1 = Rp18,000 [1]. Play 4 is a capped test; Fretea Green Tea’s rise from 22 to 31 (Top Brand Index, 2025–26) shows a Fretea score can still grow [2]. [1] Bisnis.com, 8 Oct 2026 · [2] Top Brand Award

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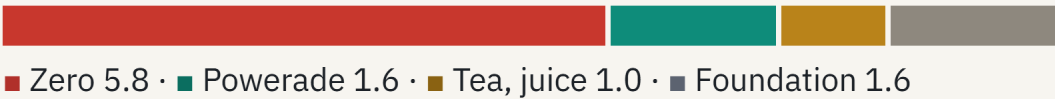
03 · Q1 · ALLOCATION AND PHASING

Spend peaks at US\$2.4M in 2029; three gates release each stage

By activity, US\$M · share of total



By brand, US\$M

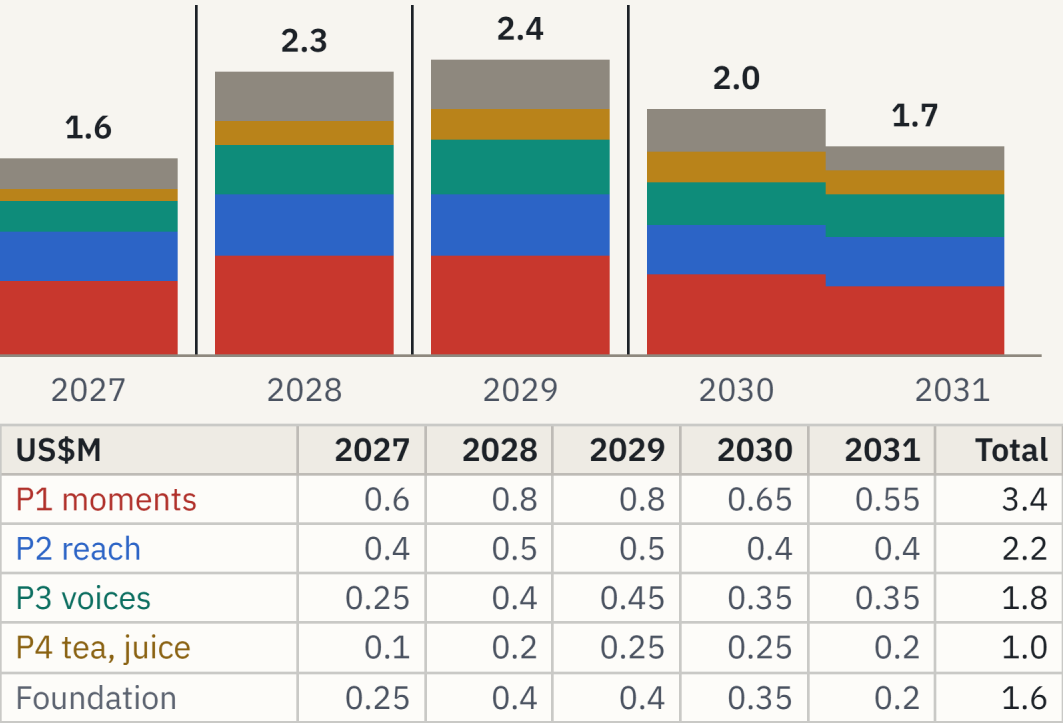


Gate 1, end-2027: scale only if pilots beat holdout cities on zero-sugar share and cost per new buyer.

Gate 2, end-2028: Play 4 stays if Frestea scores 12 and Minute Maid consideration rises 3 pts; Play 3 if Powerade consideration beats 2027.

Gate 3, end-2029: move 2030–31 money to the best play.

By year and play, US\$M; lines mark gates 1–3



Team allocation from the ratings on slide 16; unit-cost build-up in Appendix F. Zero includes US\$0.2M of Play 3’s label-reading content. Ramadan (from early Feb 2027, ~11 days earlier each year) anchors each year’s peak.

03 · Q1 · EXPECTED IMPACT AND KPIS

The base case repays its yearly spend at scale but returns 0.8× over 2027–31

Illustrative scenario, per year at scale	Low	Base	High
New Zero buyers	0.55M	0.95M	1.3M
Zero servings per new buyer a year	12	21	28
Share net-new, not switched from our drinks	40%	55%	65%
Net-new Zero servings	2.6M	11.0M	23.7M
Net-new Powerade servings	1.5M	3.5M	6.0M
Net-new Frestea and Pulpyp bottles	0.8M	2.0M	3.5M
Net-new contribution, Rp bn	10.7	37.2	76.2
Multiple of the Rp36bn average yearly spend	0.3×	1.0×	2.1×
Cumulative 2027–31 contribution ÷ US\$10M†	0.2×	0.8×	1.6×

~380 t

of sugar a year out of drinks we sell (base case, if each switched serving replaces a 390 ml Original)

Downside cover: the end-2027 gate stops scale-up spend if pilots track the low case, capping the exposure near the US\$1.6M 2027 test.

Contribution: 30% of shelf price, Zero Rp8,400 [1], Powerade Rp6,000 [2], Frestea and Pulpyp Rp4,460 and Rp6,457 [3]. All inputs are assumptions.

Lead KPIs: baseline → 2028 → 2031

Zero-sugar share of sparkling* 7% → 10% → 15%	Zero lift vs holdout cities test → +2 → +3 pts	Zero cold in priority outlets audit → 15K → 20K	Trust: “a sensible swap”‡ tracker → +10 → +15 pts
Powerade Top Brand Index none → 5+ (2029) → 15+	Frestea Top Brand Index 10 → 12 → 15	Minute Maid consideration tracker → +3 → +5 pts	Official TikTok followers 0 → 500K → 1M

*Zero Sugar, Sprite Zero, Fanta Zero (CCEP basis), including Zero’s own momentum; the lift vs two holdout cities, kept dark to 2031, is what the plan must prove. †Ramp: 2027 at 25% and 2028 at 60% of an at-scale year. ‡Tracker share of buyers calling Zero “a sensible swap”. Targets are team proposals. [1] Tokopedia · [2] Hemat.id · [3] K24Klik, all 18 Oct 2026

03 · Q1 · RISKS

Cannibalisation and creator fraud are likeliest; gate 1 caps the exposure

Risk	Likelihood	Impact	Mitigation	Owner
Zero mostly cannibalises our own drinks	High	Med	Holdout cities measure net-new; gate 1 uses it; switching still cuts sugar	Brand, finance
Creator fraud or off-brief claims	High	Med	Audience audits (43% of IG influencers hit by fake followers [1]); legal review of every claim	Brand, legal
A sweetener scare flares again (it would hit Fanta too [2])	Med	High	Label facts only; BPOM-cited replies; stevia recipes in reserve	Brand, R&D
CCEP does not co-fund visibility or packs	Med	High	Joint plan before 2027; Play 2 scales only with matched funds	Commercial
Excise (H2 2027) or mandatory Nutri-Level, Zero at C (Jun 2028) [3]	Med	High	Claim label facts, not grades; Frestea Melati at B; pack prices with CCEP	R&D, corp. affairs
Boycott sentiment returns	Med	High	Local proof and Indonesian creators; no politics; crisis protocol	Corp. affairs
Grab declines the code or bundles	Med	Med	GoFood and ShopeeFood as fallback; terms agreed before December	E-commerce
Powerade cannot dent Pocari	Med	Med	Niche-first in run clubs; gate 2 moves its budget to Zero	Brand
Tea and juice facts read as “healthy-washing”	Med	Med	Grams and label facts only, never “low sugar”; legal review; gate 2	Brand, legal

Sorted by likelihood × impact; Med = medium; ratings are team judgement. [1] HypeAuditor via DailySocial (2023 data) · [2] Coca-Cola Indonesia brand page, Oct 2026 · [3] Republika; DDTCNews, 9 Oct 2026; BPOM, 30 Jul 2026

04

Q2 · Social presence and the next post

Our accounts repeat the three gaps. The fix is TikTok-first, shoppable moment content, starting with “Makan pakai Zero”.

01	02	03	04
Clarify and contextualise	Analyse	Q1 · How the US\$10M is used	Q2 · Social presence and the next post

174K Instagram followers to Aqua’s 303K, and no live TikTok

Instagram followers [1]		Engagement	
Aqua		303K	5.62%
Le Minerale		289K	2.55%
Pocari Sweat Sport		281K	0.21%
Teh Botol Sosro		143K	0.15%
Coca-Cola ID		97K	0.34%
Frestea		61K	0.14%
Sprite ID		59K	0.37%
Fanta ID		22K	0.76%
Minute Maid ID		16K	0.33%

■ Our three portfolio accounts, 174K in all · ■ Sprite and Fanta · ■ Rivals

Olive TikTok accounts: none for the master brand or Zero, and Frestea’s 1.5K is dormant. Aqua has 1.4M, Pocari 230K [1]

To build on: a 97K master-brand Instagram, on-pack QR codes, Frestea’s 2023 Ramadan game (1M+ profiles) [10]. All 12 accounts: Appendix G.

1 · No moments

Zero has no account; it lives on @cocacola_id, where its posts chased novelty (Riot Games, AI “Y3000”, K-pop) [2]. Ramadan 2026 hashtags covered Fanta, Sprite and Frestea, not Zero [3].

Elsewhere: Pocari’s Ramadan horror-comedy drew 108M views in a week [4].

2 · No path to purchase

No shoppable link or quick-commerce tie-in on our portfolio accounts; YouTube and Facebook links go to global pages [5].

Elsewhere: one GrabAds campaign lifted Sprite’s GrabMart sales 30% [6].

3 · No credible voice

Powerade’s launch nutritionist was a one-off [7]; “pemanis buatan” questions get only the website FAQ [8]; Frestea’s 0.14% engagement is the lowest of the 12 accounts audited.

Elsewhere: Le Minerale uses national footballers and a paediatrician [9].

[1] Social Blade and HypeAuditor, 18 Oct 2026; engagement = (likes + comments) ÷ followers · [2] IndoTelko; MerahPutih, 2023; coca-cola.com/id, May 2024 · [3] Coca-Cola Indonesia, Mar 2026 · [4] dentsu, May 2025 · [5] coca-cola.com/id · [6] Koran Jakarta, Jul 2026 · [7] Selular.id, May 2026 · [8] Coca-Cola Indonesia FAQ, Oct 2026 · [9] HypeAuditor; Modash · [10] MMA, 2023

22

TikTok first: 40% of posts are moments; every Zero post links to an order

Content mix, share of posts

Moments · 40%	#MakanPakaiZero, #BukberPakaiZero, #NobarPakaiZero; “Rehat dulu” for Frestea, “Jam tiga sore” for Pulpy (gap 1)
Get it cold · 20%	GrabFood and GrabMart links, voucher drops, where to find Zero chilled (gap 2)
Voices, facts · 30%	Standalone expert explainers on sweat and on reading labels, with no product; replies that cite the label (gap 3)
Local pride · 10%	Indonesian food culture: regional sambal, legendary warungs, Nusantara dishes; never political

Channel roles

Channel	Role and cadence
TikTok	Discover: new official account, 4–5 posts a week, plus boosted creator posts
Instagram	Community: 3 Reels or carousels a week; Frestea and Minute Maid revived with facts-led Reels
GrabFood, GrabMart	Convert: bundles and codes; Grab first (the only published case), GoFood and ShopeeFood next
Replies, all platforms	Trust: sourced answers within 24 hours

Benchmarks: Pocari posts ~8 TikToks a week, Aqua ~5 [1].

Guardrails: never “healthy” or “low sugar” · “0 g gula” always with “mengandung pemanis buatan” · no comparative sugar claims · adults 18+ only · audited creators · experts explain in general, in posts with no product · no politics.

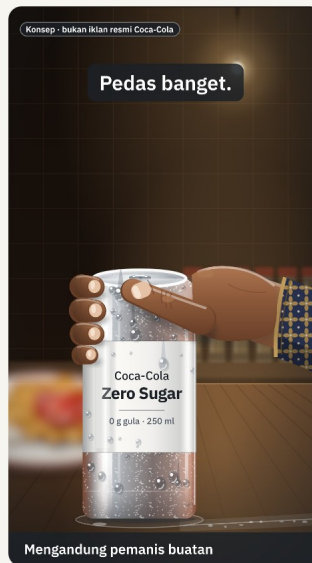
“Makan pakai Zero” goes first: it fits two gaps and sells from the post



0–4 s · Hook

“Level 5. Gas.”

Level 5. Let’s go.



4–9 s · Moment

“Pedas banget.”

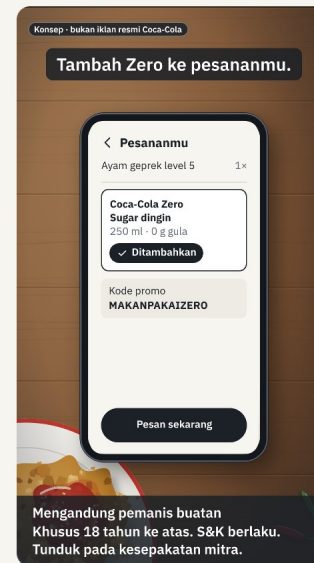
So spicy.



9–15 s · Fact

“Pedasnya nampol, gulanya nol.”

The heat hits hard; the sugar is zero.



15–20 s · Action

“Tambah Zero ke pesananmu.”

Add Zero to your order.

THREE POSTS CONSIDERED

“Makan pakai Zero”

First

Gap 1 and 2 · ready in December · orderable from the post

#BukberPakaiZero

Ramadan 2027

Gap 1 · waits for Ramadan (Feb 2027) · bundles from January

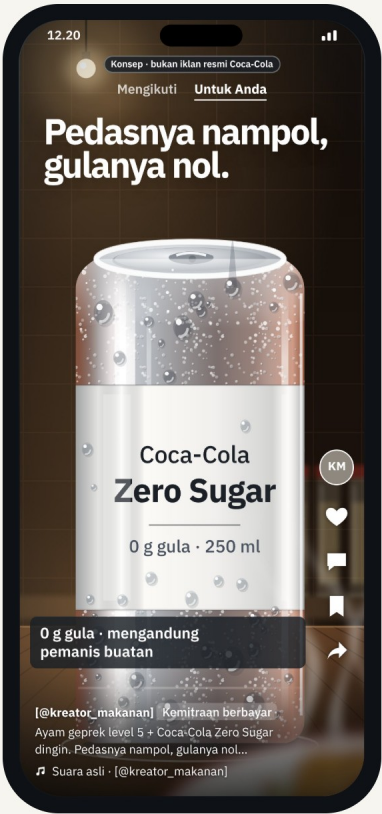
Dietitian label explainer

Runs alone

Gap 3 · needs the expert panel · cannot carry product

A 20-second creator TikTok in four beats at a warung, over level-5 ayam geprek (smashed fried chicken). Not a taste test.

The draft claims one fact, discloses the sweetener and carries a GrabFood code



Caption · Ayam geprek level 5 + Coca-Cola Zero Sugar dingin. Pedasnya nampol, gulanya nol (mengandung pemanis buatan). Tambah Zero ke pesanan GrabFood-mu pakai kode MAKANPAKAIZERO. Kamu tim level berapa?

Level-5 ayam geprek with an ice-cold Coca-Cola Zero Sugar. The heat hits hard; the sugar is zero (contains artificial sweeteners). Add Zero to your GrabFood order with code MAKANPAKAIZERO. What level are you?

[#MakanPakaiZero](#) [#CocaColaZeroSugar](#)

Publish

Mon 7 Dec 2026, launch week of the official TikTok, with 6–8 food creators; boost the best cut

On screen

“0 g gula” with “mengandung pemanis buatan” whenever Zero is in shot; legal super 32 px+

Series

Next: #BukberPakaiZero for Ramadan 2027; #NobarPakaiZero (group viewing) for football

Targets

10,000 code redemptions in four weeks (Jakarta); 25%+ completion; 1%+ shares. Under 3,000, re-cut the hook

Disclosure

“Kemitraan berbayar”; 18+ only; “Khusus 18 tahun ke atas. S&K berlaku. Tunduk pada kesepakatan mitra.”

Replies

Sourced answers to “pemanis buatan” questions within 24 hours, citing the label and BPOM

NEXT STEPS

Nov 2026 – Mar 2027: test the three gaps before we scale spend

Nov 2026

Validate the gaps: 24 interviews, 4 Gen Z groups and a tracker baseline; agree baselines, holdout cities and co-funding with CCEP

Dec 2026

Launch the official TikTok; recruit food creators and an expert panel; publish “Makan pakai Zero” on 7 Dec with a Jakarta GrabFood code; brief a dietitian on a general label-reading guide

Jan 2027

Zero-first chiller strips in 2,000 pilot outlets vs control; “Lari bareng” run-club pilots; Frestea and Pulpy facings in 500 pilot minimarkets; Ramadan bundles agreed with GrabFood and GrabMart

Feb–Mar 2027 · Ramadan test

“Bukber pakai Zero” in two pilot cities vs two holdout cities; read-out after Lebaran (Eid)

Decisions needed		Owner	By
1	Approve the 2027 budget of US\$1.6M	Marketing director	Nov 2026
2	Agree CCEP co-funding for Zero visibility, coolers and affordable packs	Commercial director with CCEP	Dec 2026
3	Approve the official TikTok and the claims rules	Brand and legal	Nov 2026
4	Brief R&D on Frestea recipes below 6 g sugar per 100 ml, so Melati grades B with margin and more flavours join it	R&D	Q1 2027

END OF THE MAIN DECK

Thank you

Questions and discussion

APPENDIX

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What 477 forum comments say about our drinks

Theme	Raising it	Dismissing it	Strength	Example (translated)
Sweet-tea habit, sweet palate	13	7	Strong	“Since they cut the sugar, I can’t be bothered buying bottled tea”
Sweetener fear (diabetes, cancer, kidneys)	12	3	Moderate–strong	“Can I get diabetes from Coke Zero?” “Yup. You can.”
Sweetener taste, in general	17	3	Moderate	Stevia’s “bitter aftertaste”; Coca-Cola “tastes like medicine now”
Taste of Zero specifically	2	5	Weak	Coke Zero Vanilla: “honestly, this is seriously good”
Soda-category beliefs	11	1	Moderate	“Some say soda makes your bones brittle”
“Zero is still unhealthy”	7	0	Moderate	“Coke Zero still contains sweetener”
Price and value (none on Zero)	10	0	Moderate	The 250 ml can “just isn’t enough”
Availability (2 on Zero, 6 on Frestea)	8	4	Weak–moderate	“Why is Frestea OG hard to find in minimarkets?” (thread title)
Boycott	9	5	Weak in forums	If it’s discounted, “who cares about the boycott”

Method: 20 r/indonesia threads (2020–26), ~19–25 top comments each; skews urban, young and online; unweighted, not representative.

Source: team scan of public r/indonesia threads, Oct 2026; selected thread links (9) in Appendix J. Quotes translated from Bahasa Indonesia.

Levers 1–8: notice, accept and want

#	Lever	Key evidence	Evid.	Move	Verdict
1	Presence in soda moments	Ramadan volume over 2× an average month; Zero absent from Ramadan 2026 and Share a Coke 2025	5	4.5	Solve
2	Presence where 18–35s discover	84.8% of Gen Z find trends first on TikTok; no official Coca-Cola Indonesia account found	3.5	4.5	Solve
3	Brand acceptability (boycott)	Behind the €175M impairment (2024); last cited by CCEP in H1 2025; weak in forums	4.5	2.5	Guard
4	Sweetener credibility	Minister grades artificial sweeteners C or D; Ace-K named in 2023; Nutri-Level caps Zero at C, like full-sugar Original	4	4	Solve
5	Soda health beliefs	Health portals call “diet soda is safe” a myth; 11 forum comments; hits the whole category	2.5	1.5	Monitor
6	Taste of zero sugar	2 forum comments fault Zero’s taste, 5 praise it; analogues won on value, reach and ads, not recipes	1	4.5	Tactic
7	Occasion fit (meal vs thirst)	Soda “makes you thirstier” in the heat, but fits meals and gatherings	3	4.5	Solve
8	Powerade’s reason to buy	Pocari built its lead with clinicians; 77% rank specialists the top wellness influence; no organic Powerade talk	3.5	3.5	Solve

Evid. = how strongly evidence shows the lever blocks growth; Move = how far a US\$2M-a-year budget can move it (1 low, 5 high; team judgement). Sources as cited on slides 5–14.

APPENDIX B · LEVER EVIDENCE AND SCORES (2 OF 2)

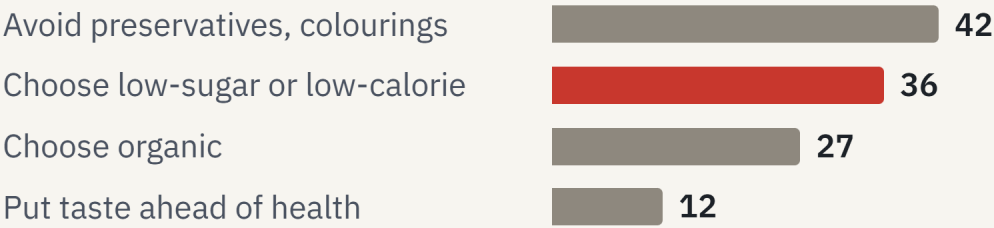
Levers 9–15: find, afford, repeat and context

#	Lever	Key evidence	Evid.	Move	Verdict
9	Physical availability	Zero over 30% of our modern-trade mix; relaunch listed modern trade and online only; Frestea “hard to find” in 6 comments; CCEP serves ~400K of ~4M outlets	5	3.5	Solve
10	Entry price and pack	Affordability is CCEP’s main stated cause; a 1L cut to Rp10,000 grew double digits; India’s Rs10 Zero	3.5	2	Enable
11	Zero’s price vs Original	Rp8,400 vs Rp8,000 for 390 ml online; no forum complaint about Zero’s price	1	2	Monitor
12	Sweet-tea habit	62% like adding sugar; less-sugar teas “not selling”; Frestea’s 2024 sugar cut drew complaints	4	1	Guard
13	Rewards and loyalty	Growth comes from new buyers; Frestea’s 2023 game: 90% of identified buyers new, so a trial tool	2	3.5	Tactic
14	Regulation push	Excise proposed in 2020, not yet in force; Nutri-Level voluntary until June 2028; tracked as a risk on slide 20	1	1	Monitor
15	Recipe gaps	Frestea runs 6.0–9.2 g, with Melati on the 6 g B line; Pulpy 9.0 g; recipes are R&D’s call	3	1.5	Enable

Evid. = how strongly evidence shows the lever blocks growth; Move = how far a US\$2M-a-year budget can move it (1 low, 5 high; team judgement). Sources as cited on slides 5–14 and 20.

Indonesians want less sugar, but “healthy” means natural, and the state now grades sweeteners down

Health trends that shape purchases, % [1]



Most want less sugar; few have cut it: **54%** try to eat low-sugar [2], **19%** live sugar-free [3], **62%** like adding sugar [4]. **Brief scenario data:** 72% of 18–35s monitor sugar; 61% link Coca-Cola with fun, 18% with health.

What the health authorities say

Jul 2023	Health Ministry urges limiting sweeteners, naming acesulfame-K, one of Zero’s two sweeteners [5]; BPOM’s reassurance covers aspartame only [6]
Jun 2026	Health Minister grades stevia B and artificial sweeteners C or D [7]
Jun 2026	Nutri-Level for packaged drinks: A no sweeteners, B natural only (≤6 g sugar); mandatory from June 2028 [8]
H2 2027	Sugar-drink excise targeted, rates unset; proposed in 2020, budgeted since 2022, still not in force [9]

So what: “0 g sugar”, vitamin C and real tea are facts we can own; “healthy” is a claim doctors and the state contest [10].

[1] Populix via GoodStats, Dec 2025 (n=1,100) · [2] Cargill, 2025 · [3] Jakpat, Jul 2025 · [4] KIC, 2023 · [5] Antara, 16 Jul 2023 · [6] BPOM, 25 Jul 2023 · [7] iNews, 22 Jun 2026 · [8] BPOM, 30 Jul 2026; Cekindo, Sep 2026 · [9] Republika; DDTCNews, 9 Oct 2026 · [10] KlikDokter, 2020

Impact, readiness and value set the allocation

Kept option	Gap	Impact	Ready	Value	US\$M	Play
Ramadan bundles, iftar sampling	1	High	High	Med	1.3	P1
Meal bundles on delivery apps	1, 2	High	High	High	0.7	P1
Moment creators and boosting	1	High	Med	High	1.1	P1
Nongkrong and football sampling	1	Med	High	Med	0.3*	P1
Chiller strips, 20,000 outlets	2	High	Med	Med	1.2	P2
Quick commerce and vouchers	2	Med	High	Med	1.0*	P2
Experts; label-reading	3	High	Med	High	0.8	P3
30 run-club partnerships	3	Med	High	High	0.6	P3
Race zones, venue visibility	3	Med	Med	Low	0.4*	P3
Frestea meal and break moments	–	Med	High	Med	0.4	P4
Vitamin C and real-tea facts	–	Med	High	High	0.3	P4
Frestea, Pulpy chilled in minimarkets	–	Med	Med	Med	0.3	P4
TikTok home, tracker, reserve	All	Enabler	High	–	1.6*	Fdn

How the ratings set the money

1 • Gaps first. Play 1 gets most (US\$3.4M): gap 1 scored highest (evidence 5, movable 4.5) and every lever is ours.

2 • Partners next. Play 2 (US\$2.2M) is smaller because CCEP co-funds visibility and packs.

3 • Cap the uncertain. Play 3 (US\$1.8M) and tea and juice (US\$1.0M, a ring-fenced 10%) face strong leaders, Pocari and Teh Pucuk; both are reviewed at end-2028.

4 • Trim the weakest. In Plays 1–3, medium-impact options without high value (*) gave up US\$0.8M and the reserve US\$0.2M: that funds Play 4.

Team judgement against slides 10–13 and the unit costs in Appendix F. Impact: effect on the gap; Ready: launchable in 2027 with our own resources; Value: expected new buyers per dollar. *Trimmed to fund Play 4: nongkrong 0.5 to 0.3, vouchers 1.2 to 1.0, races and venues 0.8 to 0.4, reserve 0.4 to 0.2.

How the brief's figures compare with verified sources

Brief scenario figure	Verified comparison	How the deck uses it
Indonesia is Coca-Cola's biggest Southeast Asian market	Largest by population (284.7M); by revenue the Philippines is 5.8× larger (€1,890M vs €328M, FY2025)	Framed as largest consumer market and biggest headroom
SEA ready-to-drink market US\$61bn (2024) to US\$82bn (2030); Coca-Cola 26% share	No public source found; the two values imply ~5.1% a year, not 6.3%	Context only (slide 6)
Sparkling 44% (+2%); juices 28% (+8%); water and teas 23% (+10%), all “functional”	CCEP: sparkling 60%+ of its Indonesian volume (2022); water 66% of the market; RTD tea and juices fell in 2025–26	Teas and juices in scope (slide 5); CCEP trends used (slide 7)
72% of 18–35s monitor sugar; 61% link Coca-Cola with fun, 18% with health	Cargill: 54% try to eat low-sugar; Jakpat: 19% live sugar-free; no source for the 61/18 split	Shown beside verified data (slide 13; Appendix C)
74% would pay 10–15% more for low/no-sugar	NIQ: 48% would pay 10%+ more for added nutrition; 19% would pay 20% more	Price set aside (slide 10)
82% of Gen Z discover new drinks online	Jakpat: 84.8% of Gen Z first find trends on TikTok	Consistent (slide 14)
Sales: general trade 55%, modern 32%, e-commerce 13%; our digital share 11%	CCEP: general trade ~70% of market volume; Kantar: 67% of FMCG via traditional trade	Market figures used (slides 12, 14)

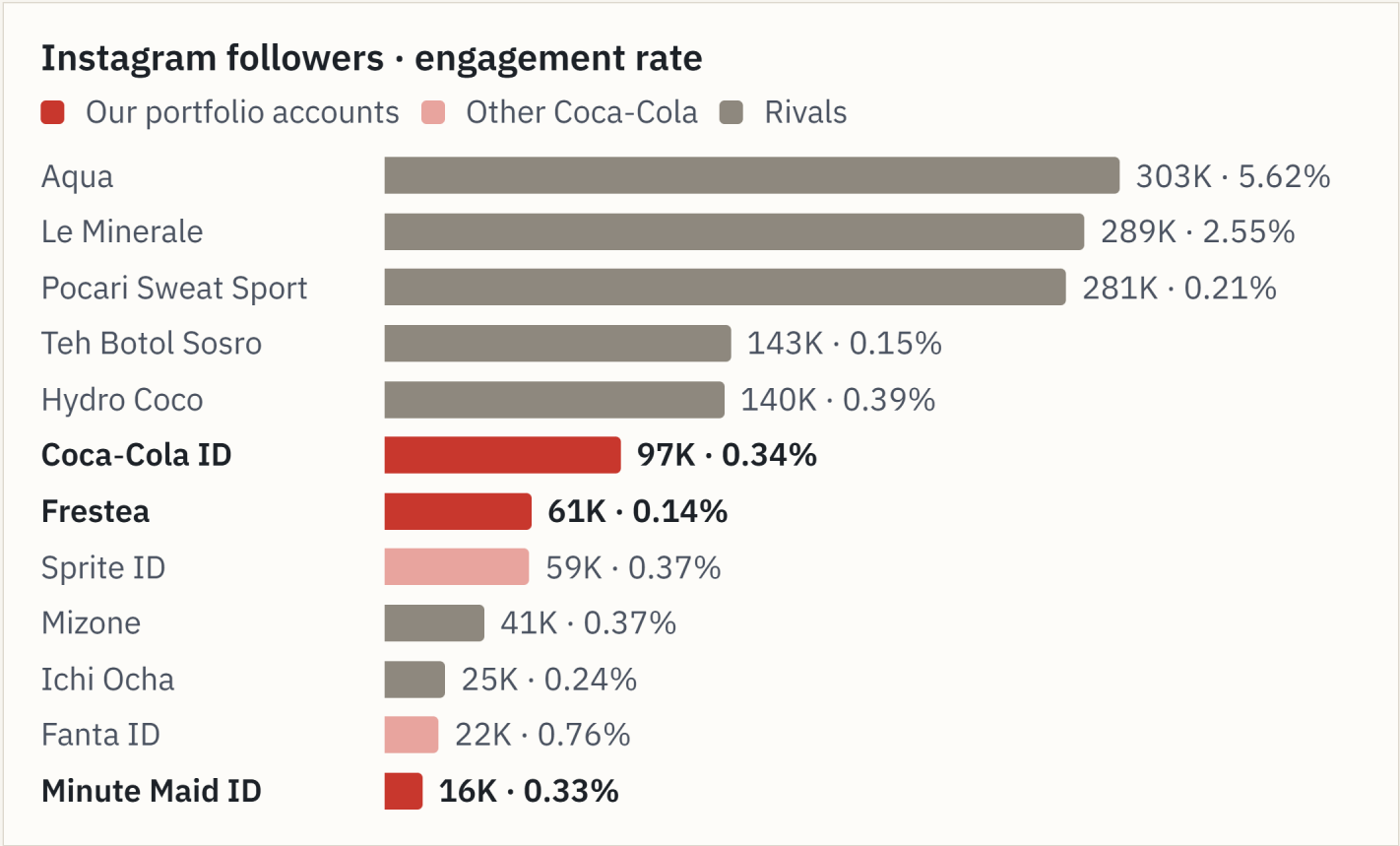
“Brief” on slides marks these figures, shown for reference; decisions rest on the verified sources. The Coca-Cola system now reports 2.2bn servings a day (brief: 1.9bn). Not found publicly: rival shares (PepsiCo 18%, Suntory 10%, Nestlé 8%), SEA e-commerce +48% and digital shares (PepsiCo 18%, Suntory 20%); context only.

How the US\$10M builds up from unit costs

Activity	Unit cost × volume, 2027–2031 (US\$M)	US\$M	Basis
Creator and social content	Moment creators: 3,000 micro posts × Rp3M, 150 mid-tier videos × Rp25M, ~233M boosted impressions at ~Rp27K CPM (1.1) · experts: 1,200 videos × Rp8M (0.53) plus ~180M boosted impressions (0.27) · tea and juice facts: 400 videos × Rp8M plus ~80M impressions (0.3) · always-on studio and listening (0.8)	3.0	Rate cards [1]; Meta CPM [2]
Commerce, bundles and vouchers	1.8M Ramadan bundle discounts × Rp5,000 (0.5) · 2.0M meal-bundle vouchers × Rp5,000 plus delivery-app ads (0.7) · 2.0M first-order vouchers × Rp5,000 plus retail media (1.0) · 0.7M Frestea meal-bundle vouchers × Rp5,000 (0.2)	2.4	Assumptions
Sampling and events	3.7M Zero servings × ~US\$0.30 at iftar, nongkrong and nobar (1.1) · 0.67M Frestea servings × ~US\$0.30 at office breaks (0.2) · 30 run clubs × US\$4K a year (0.6) · 4 races a year × US\$10K (0.2)	2.1	Assumptions
Shelf and venue visibility	20,000 outlets × US\$60 for chiller strips, shelf kits, retailer rewards; CCEP supplies the coolers (1.2) · 5,000 minimarkets × US\$60 for Frestea and Pulpy facings (0.3) · 200 sports venues × US\$1,000 (0.2)	1.7	Assumptions
Measurement and research	Brand tracker, 2 waves a year × US\$40K (0.4) · interviews, geo tests and brand lift (0.2)	0.6	Assumptions
Reserve	Held back for the tests that win at each stage gate	0.2	2% of total
Total	Matches the allocation on slide 18; Rp18,000 per US\$ [3]	10.0	

[1] Olakses citing Snippet, Indonesia influencer rates 2026 · [2] Adsumo, Meta CPM Indonesia, Oct 2026 · [3] Bisnis.com, 8 Oct 2026.
Other unit costs are assumptions to test in 2027.

Instagram detail: 12 accounts compared



174K followers on our three portfolio accounts (255K with Sprite and Fanta), fewer than Aqua’s one

3x+ more interactions per post for Aqua than @cocacola_id (HypeAuditor; Social Blade’s higher figure is likely inflated by giveaways) [1][2]

16K Instagram followers for Minute Maid, the smallest of the 12 accounts [2]

0.14% engagement for Frestea, the lowest of the 12 accounts

Zero Sugar has no account of its own; it lives on @cocacola_id. No Ades account was found.

[1] Social Blade, accessed 18 Oct 2026; engagement = (average likes + comments) ÷ followers · [2] HypeAuditor, Oct 2026 (the 3x lower bound). Pocari’s main @pocariid (~165K) is not shown.

35

A short study to confirm, or overturn, the three gaps

Design: 24 in-depth interviews plus 4 Gen Z groups · ages 18–35 · Jakarta, Surabaya, Medan · quotas for Zero drinkers, lapsed Zero drinkers, soda drinkers who never tried Zero, packaged tea and juice drinkers, and runners · 60 minutes in Bahasa Indonesia

Section	Sample question	Tests
1 · Warm-up, 5 min	Walk me through everything you drank yesterday, and where you got it.	Moments, channels
2 · Soda moments, 10	When did you last drink soda? Who with, with what food, bought where?	Gap 1
3 · Finding it, 10	Where would you look for a cold Zero near you? What if it isn’t there?	Gap 2
4 · Trust, 10	What do you think is in Zero? Whose word would you take on sweeteners? What does “vitamin C” on a juice tell you?	Gap 3
5 · Taste and price, 10	Have you tried Zero? What stopped you buying it again?	Levers 6, 10–11 (to disprove)
6 · Brand feeling, 10	Which drink brands feel “ours”, and why?	Lever 3 (never prompted)
7 · Concept, 5 min	React to “Makan pakai Zero”: would you watch it, order, share?	Next post

Decision rule: a gap is dropped if most interviews contradict it; taste comes back as a priority if most lapsed drinkers cite it.

Method, assumptions and data caveats

Evidence and caveats

Indonesian sources throughout; regional or global analogues are labelled. Figures marked “Brief” are scenario data (Appendix E).

The Top Brand Index blends awareness, use and intent; it is not market share.

The CME deck was read as extracted text; the Zeros 3% to 7% figure comes from a call transcript, basis unstated; the >30% modern-trade figure uses a different base.

The Health Minister’s sweetener grades come from one secondary report; Nutri-Level cut-offs come from BPOM releases and summaries, as the full regulation was not reachable; YouGov’s soft-drink figures date from about 2019.

Assumptions to replace

FX: Rp18,000 per US\$, rounded from October 2026 rates.

Contribution: 30% of shelf price (Zero Rp8,400, 390 ml; Powerade Rp6,000, 400 ml; Frestea Rp4,460 and Pulpy Rp6,457 for listings labelled 350 ml, mixed 50/50; Pulpy’s brand page lists 300 ml and 1 L, so confirm pack and price); sampling at ~US\$0.30 a serving.

Scenario inputs (Zero buyers scaled to Zero’s share of the budget), KPI targets, lever scores, option ratings, risk ratings and the 2027–31 phasing are team judgement.

Social metrics: public Social Blade and HypeAuditor pages on 18 Oct 2026. Forum scan: unweighted, not representative.

Glossary

Bukber breaking the fast together • **nongkrong** hanging out • **nobar** group viewing • **Makan pakai Zero** eat with Zero • **Lari bareng** run together • **Rehat dulu** take a break • **Jam tiga sore** 3 pm • **warung** neighbourhood shop • **Lebaran** Eid • **AKG** daily value • **CCEP** Coca-Cola Europacific Partners, the bottler • **BPOM** food and drug agency • **modern trade** supermarkets and minimarkets • **general trade** warungs and small shops

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