PUB LEADERS
SUMMIT 2026

STATE OF THE NATION

The Outlook for Australia's Venues

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State of the Nation – Agenda

PUB LEADERS SUMMIT 2026

MACROECONOMIC ENVIRONMENT

CHANNEL TRENDS & INDUSTRY INSIGHTS

COMMERCIAL IMPLICATIONS & OPPORTUNITIES

Macroeconomic Environment

Coca-Cola EUROPACIFIC PARTNERS | PUB LEADERS SUMMIT 2026

Australian Macroeconomic Indicators

PUB LEADERS SUMMIT 2026

Cash Rate
4.35%
▲ 0.50pts vs LY

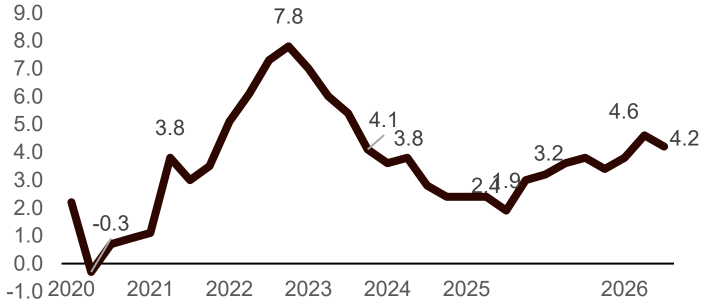
Inflation
4.2%
▲ 1.2%pts VS LY

Unemployment
4.5%
▲ 0.2%pts VS LY

Wage Price Index
3.3%
▼ 0.1% VS LY

Inflation Softens; Pressure Remains

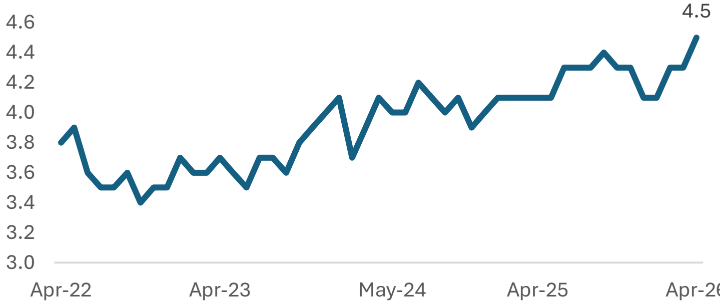
CPI YoY % change trended – Last 5-years



- Annual CPI eased from 4.6% in March to 4.2% in April, largely driven by a 7.0% monthly fall in automotive fuel following the temporary fuel excise cut.
- This should be treated cautiously, as trimmed mean inflation actually rose from 3.3% to 3.4%, suggesting underlying price pressure remains elevated.

Labour Market Starts to Soften

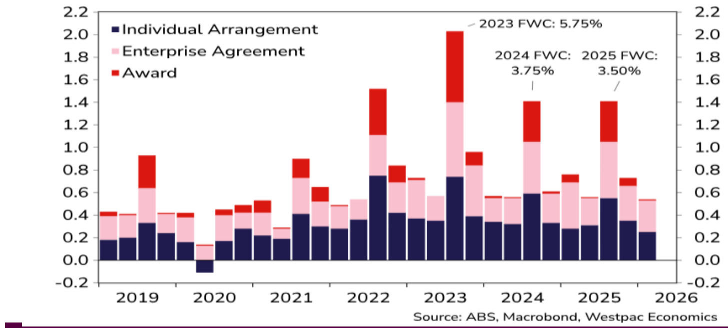
Unemployment Rate % Trended



- Unemployment rose to 4.5% in April, with employment falling by 18.6k and the number of unemployed people rising by 33k.
- The rise does not appear to be a clear mass-layoff story, as hours worked still increased; however, business surveys point to weaker forward orders, falling capex and softer employment measures..

Minimum Wage to Increase

Contributions to QTR WPI Growth by pay setting arrangement



- The Fair Work Commission has announced a 4.75% increase to minimum award wages from the first full pay period after 1 July 2026.
- This creates a dual effect: improved income for lower-paid workers could support small discretionary spending, but higher labour costs may pressure hospitality, retail and other award-heavy channels.

Source: ABS Unemployment Rate, May 2026; ABS Monthly Consumer Price Index Indicator, May 2026; RBA Statistics (May 2026); Macrobond, Westpac Economics

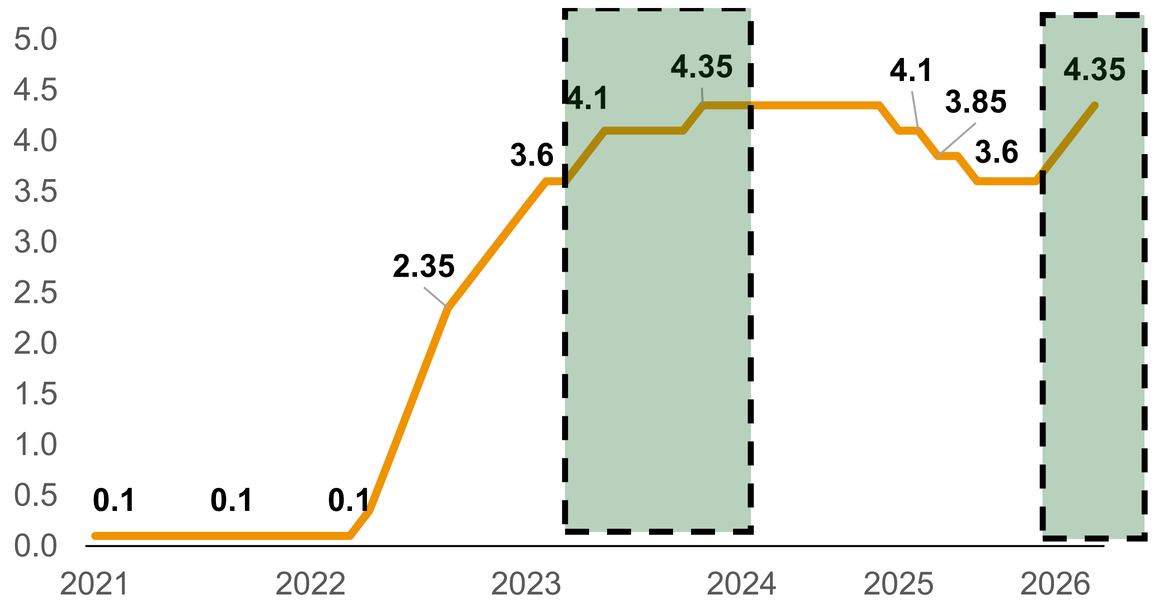
State of the Economy

Cash Rate & Inflation

The shape of these key economic factors in 2026, is similar to that of 2023; To help best prepare for the next 18 months it is worth considering what worked well/didn't work well during this period

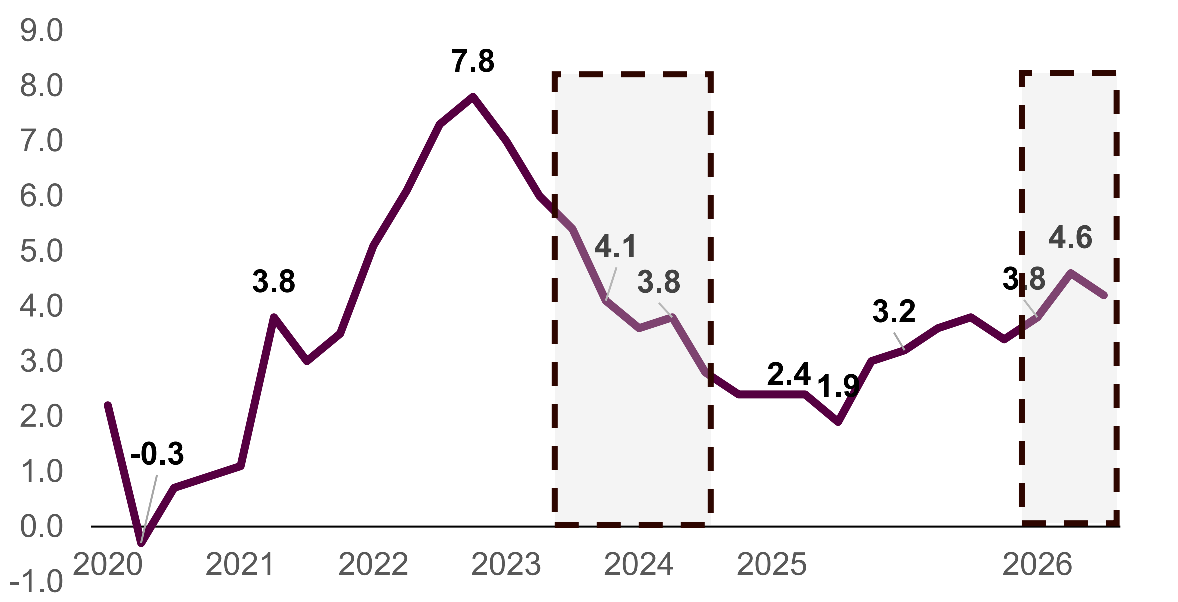
RBA Cash Rate

RBA Cash Rate Trended – Last 5-years



Inflation (Consumer Price Index)

CPI YoY % change trended – Last 5-years



Source: CCEP Commercial Insights; RBA Statistics (May 2025); ABS CPI (May 2025)

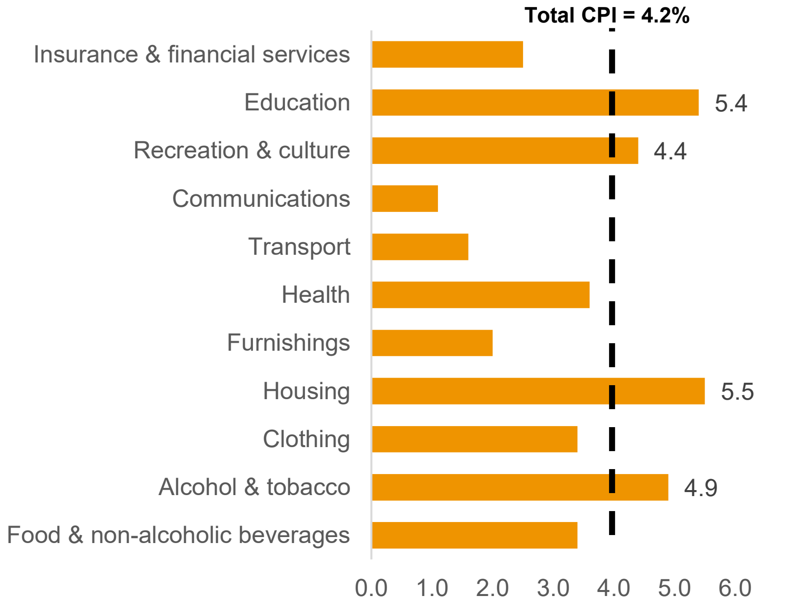
State of the Economy

Drivers of Inflation

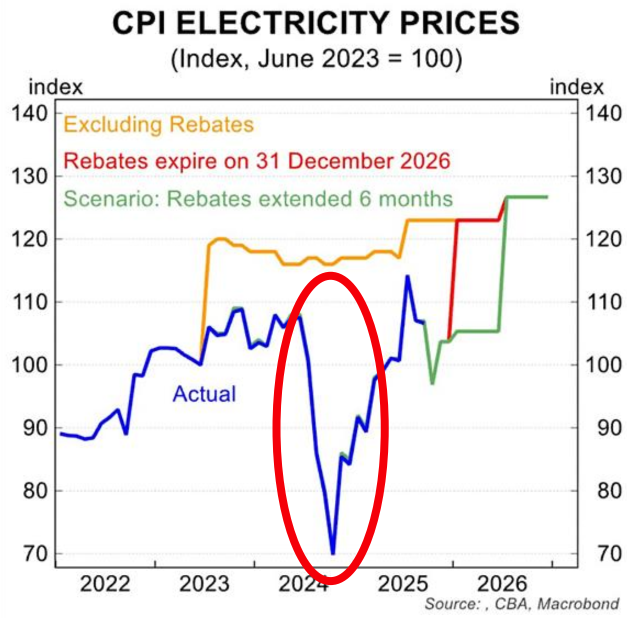
Inflation is expected to remain high and not return to the target band of 2-3% until at least late 2027; This sustained pressure is driven by 'sticky' factors like housing, energy and other services

Housing Costs

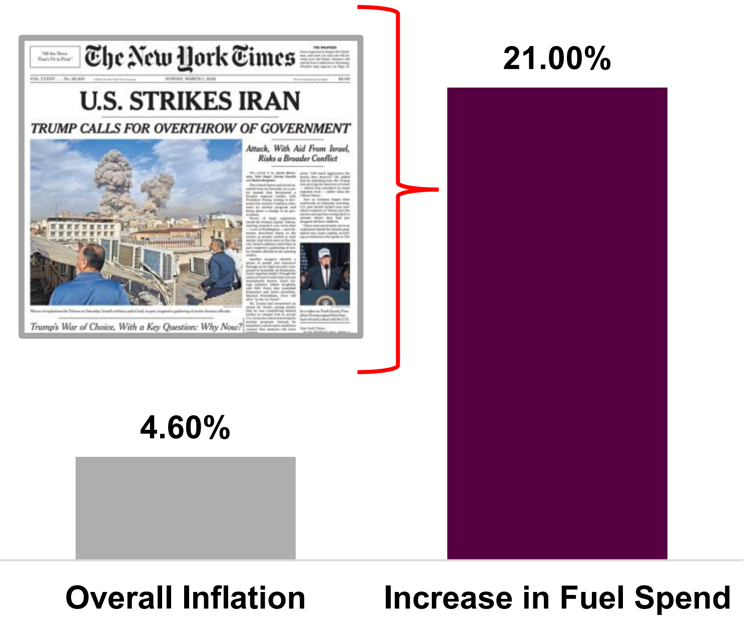
CPI Annual movement by Groups (%)



Cycling Rebate Schemes



Global Conflicts



Source: CCEP Commercial Insights; RBA Statistics (May 2025); ABS CPI (May 2025)

State of the Economy

Housing Crisis

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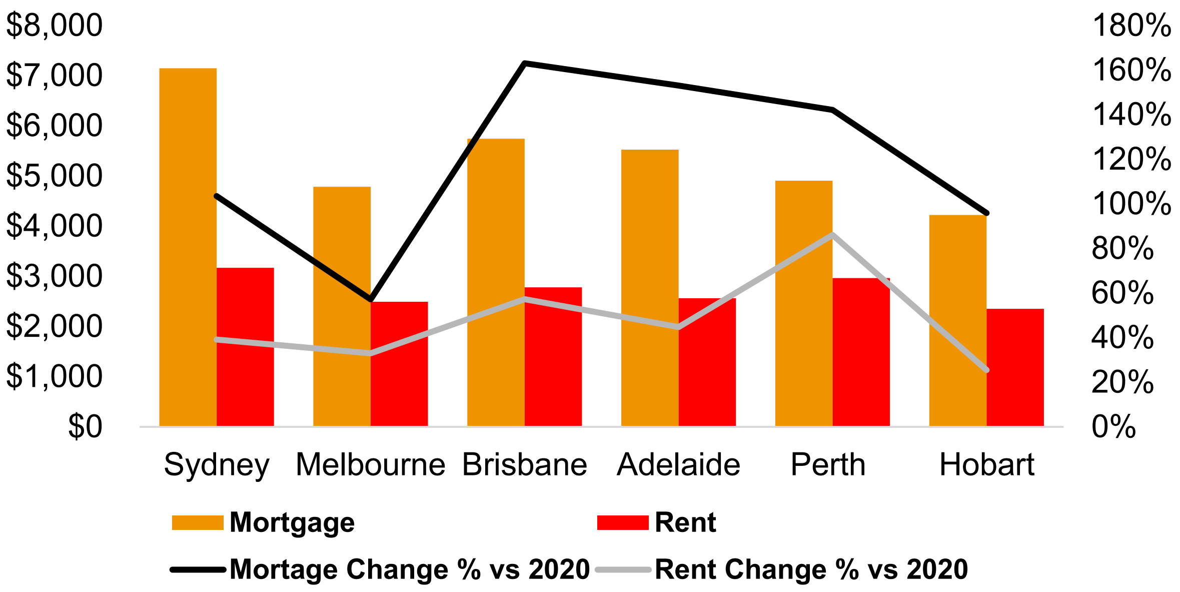
Australians are paying double in mortgage repayments as they were in 2020 in almost every state; Almost half of Australian renters surveyed say they struggle to pay their rent each month

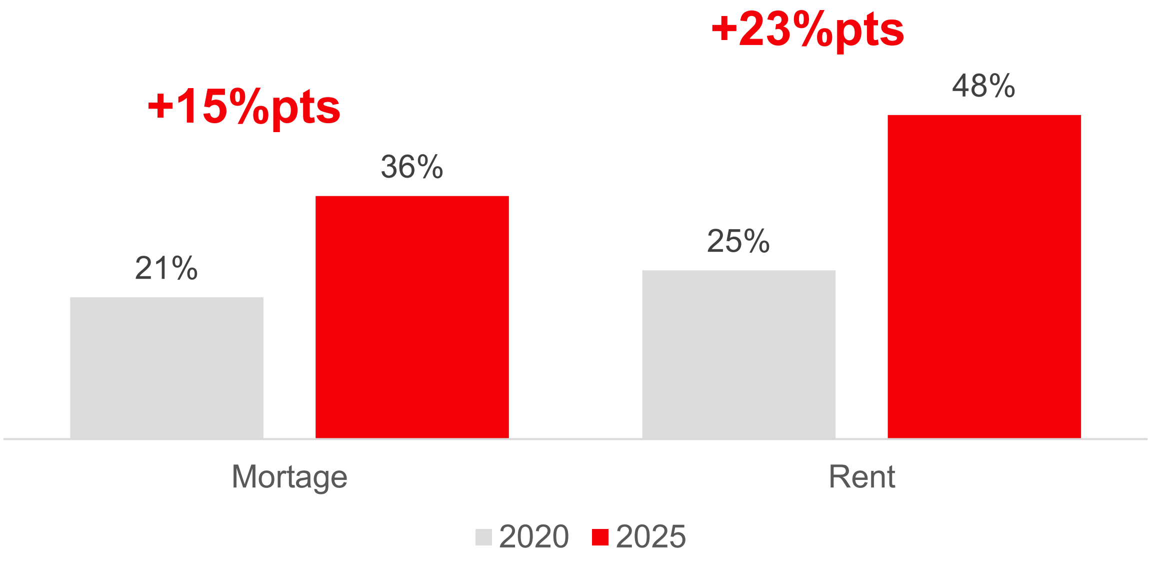
Australian Average Mortgage Repayments

Monthly Mortgage Repayments (Average Variable Rate) – 5yr trend



Repayment Struggles

Do you struggle to pay your home loan or rent?

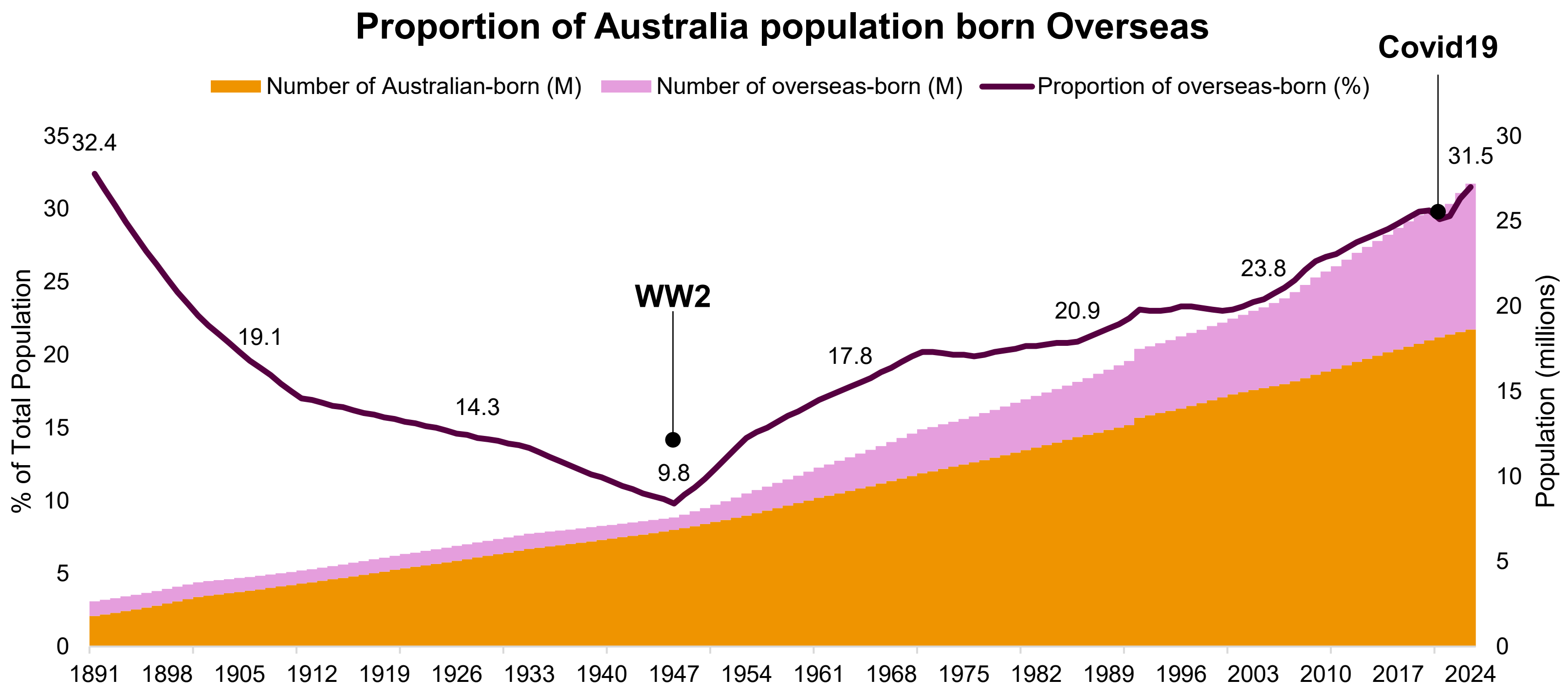


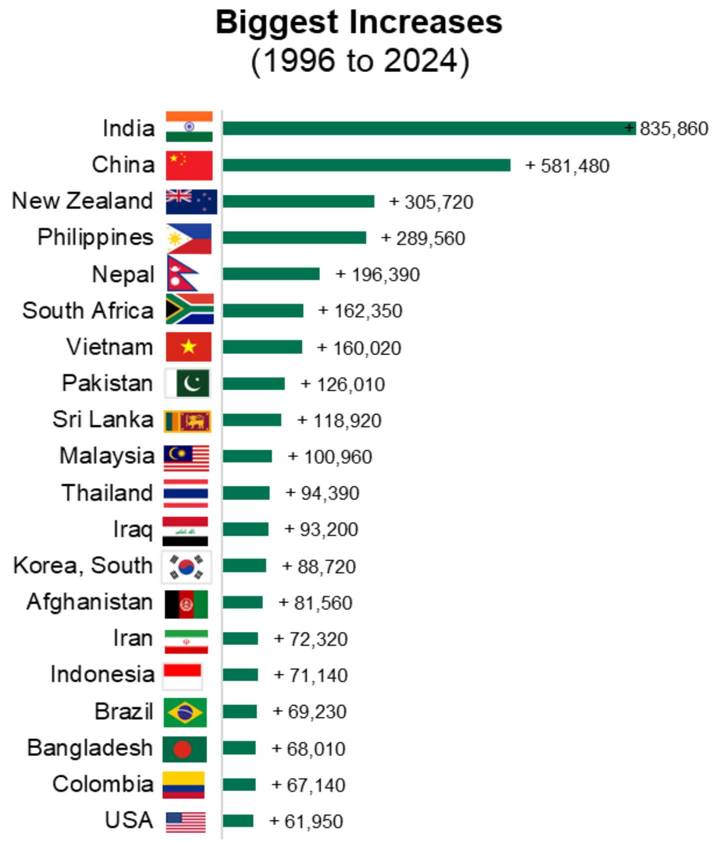
Source: CCEP Commercial Insights; Cotality (formerly CoreLogic) Capital Cities House Prices, Calculations are based on the average median sales price from the last 3 months, the principal loan amount, a 20% deposit, and the outstanding Owner-occupied Principal and Interest

State of the Economy

Population & Shifting Demographics

Large population increases have been driven predominately from overseas migration; 31.5% of Australian's are now overseas born the highest proportion since 1891!





31.5% are overseas born (vs 23.8% 20 years ago)

8.6m people born overseas (vs 4.8m 20 years ago)

Overseas Born % is **expected to rise.** Some predicting 35% by 2046

Largest increases
(1996 vs 2024)
India +836k
China +581k
NZ +306k
Philippines +290k

Largest decreases
(1996 vs 2024)
Italy -94k
Greece -48k
Netherlands -30k
Scotland -25k

Source: Australian Bureau of Statistics (June 2024), *Australia's population by country of birth*, ABS Website, accessed 16 February 2026 *Excluding Australia; Soft Drink Cola per Capital Consumption, Coca-Cola Global Commercial Insights 2025

State of the Economy

Breakdown by State

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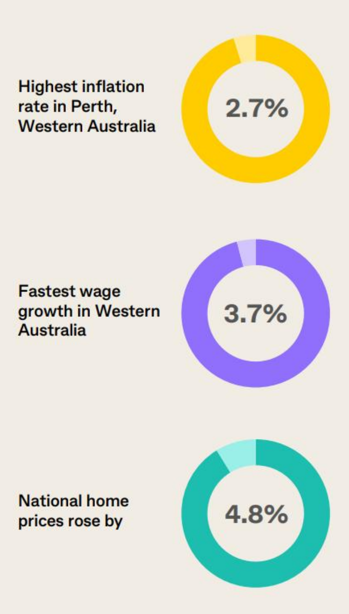
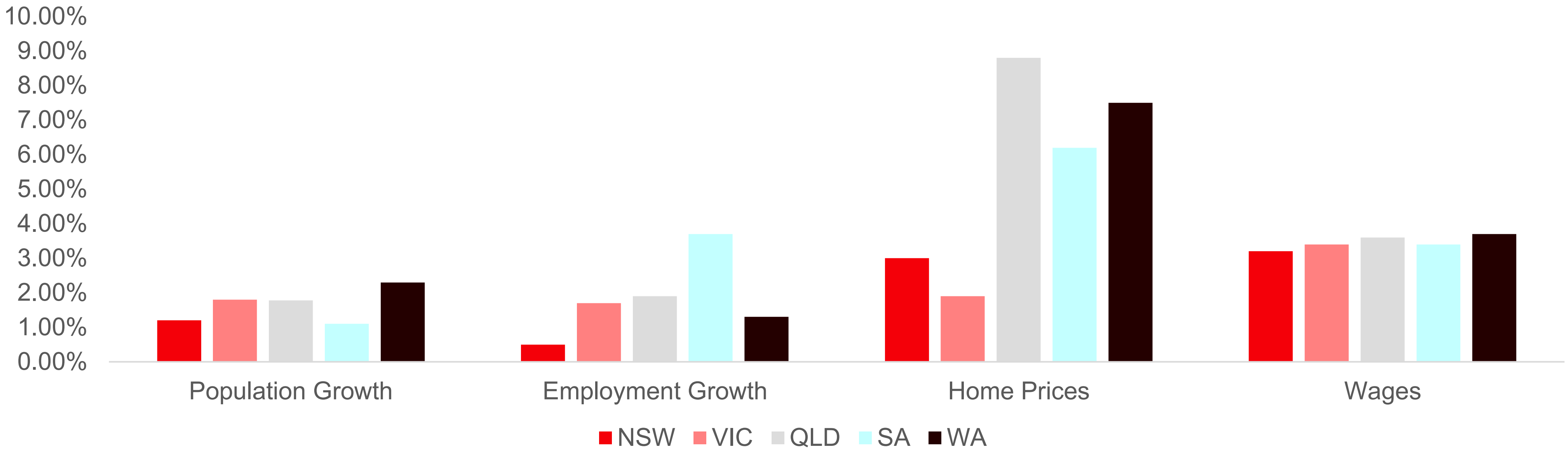
Despite a large % increase in housing costs, both WA and QLD have seen the largest increase in spending driven by strong wage and population growth

Economic Indicators by State Performance (% Change to March 2026)





	NSW	VIC	QLD	SA	WA
Population Growth	1.20%	1.80%	1.78%	1.10%	2.30%
Employment Growth	0.50%	1.70%	1.90%	3.70%	1.30%
Home Prices	3.00%	1.90%	8.80%	6.20%	7.50%
Wages	3.20%	3.40%	3.60%	3.40%	3.70%
Household Spending	1.80%	0.40%	4.20%	1.70%	5.20%

Source: CCEP Commercial Insights; CommSec – State of the States Report; Mar 2026

How will our patrons be impacted this economic environment?

Economic Effects

Consumer Confidence

Cost-of-Living is still the #1 issue felt by Australians, with 66% of consumers now expecting the economy to worsen further before it gets better; Confidence has dropped to a 2-year low

Top Issue Facing Australians

PWC – Voice of the Consumer Survey

55%

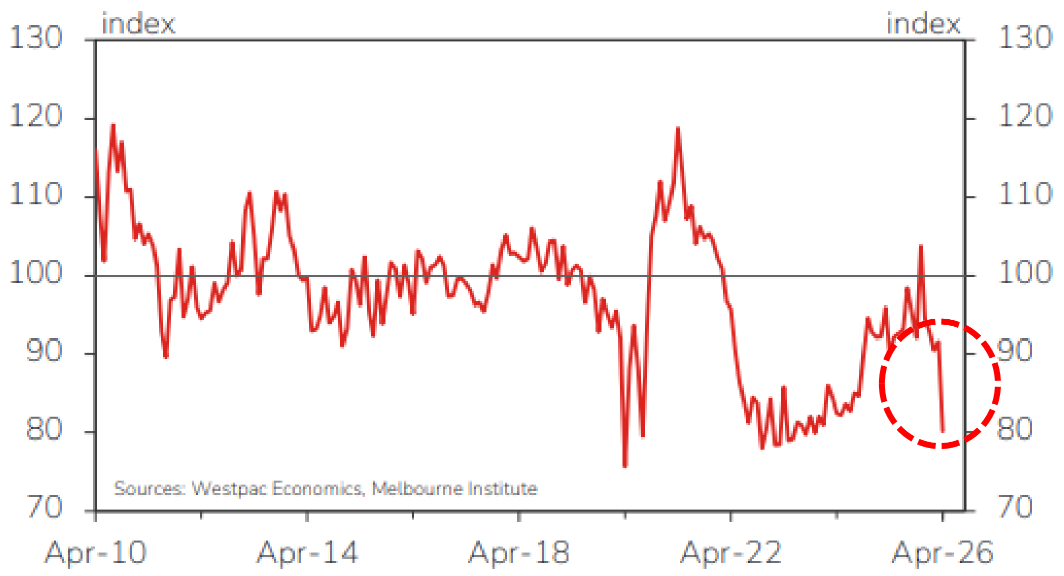
Surveyed Australians feel financially insecure

74%

Surveyed Australians identify rising living costs as top concern

Consumers Confidence

Westpac Consumer Sentiment Index – April 2026



Source: CCEP Commercial Insights; JWS Research True Issues, Feb 2026; Westpac-Melbourne Institute Consumer Sentiment, Apr 2026

Economic Effects

Channel Leaking

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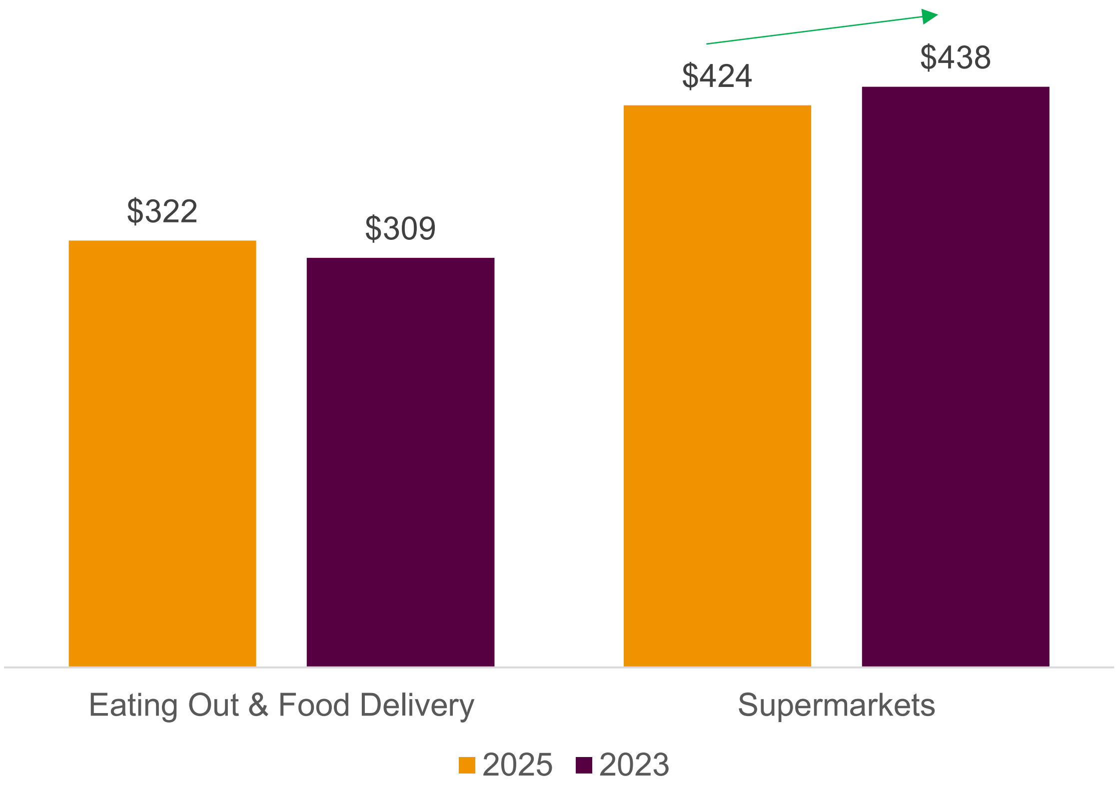
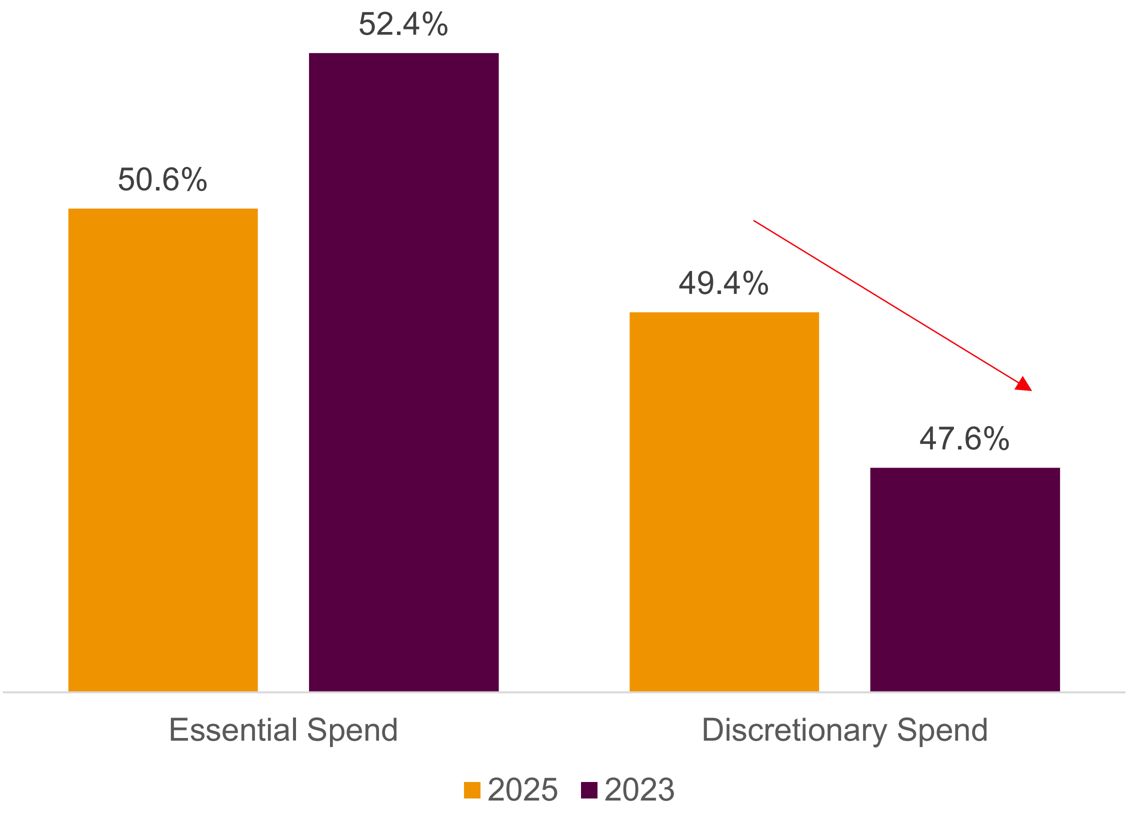
Using 2023 as a blueprint for future behaviour, we expect a slight shift to "At Home" consumption as consumers tighten discretionary spend within these uncertain economic conditions.

Total Monthly Spend on "Eating Out" 2025 vs 2023



Source: CommBank iQ Cost of Living Report 2023 vs 2025

Essential vs Discretionary Share of Wallet (2025 vs 2023)



Economic Effects

Breakdown of Discretionary Spend

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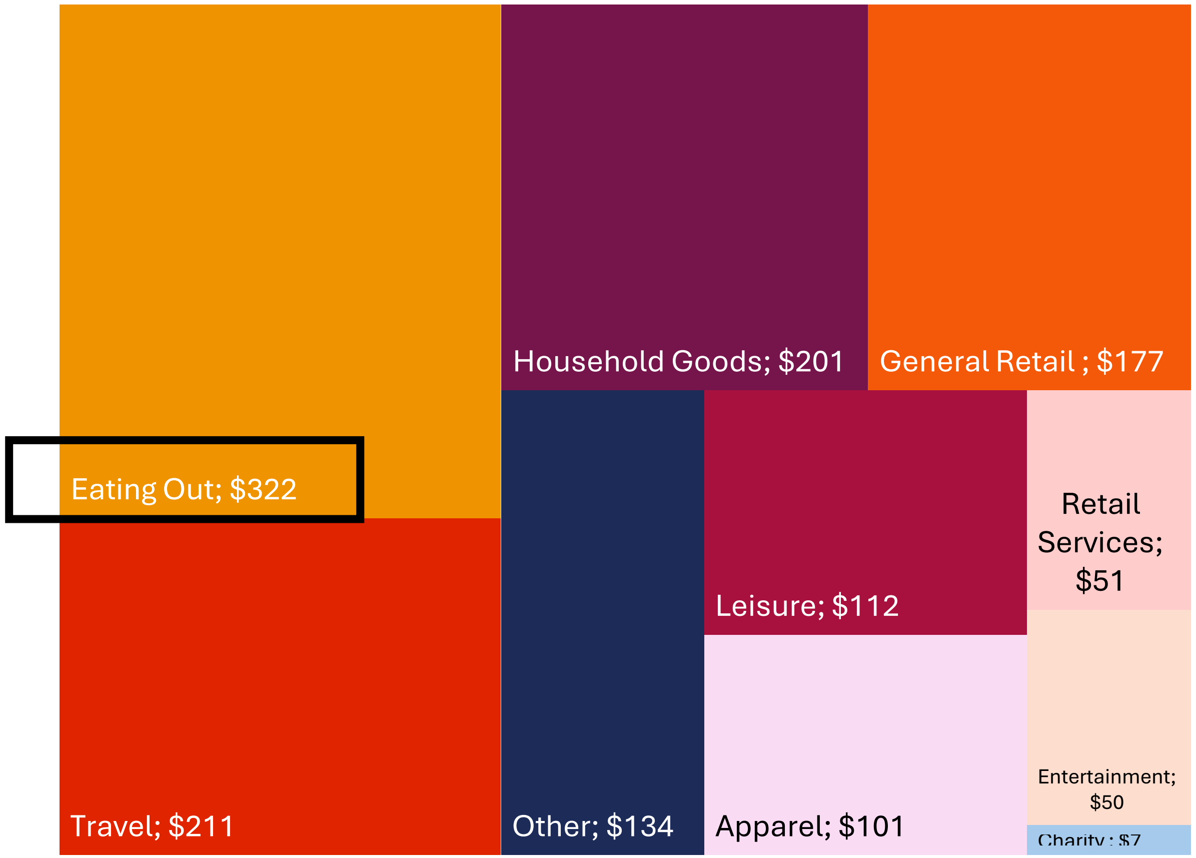
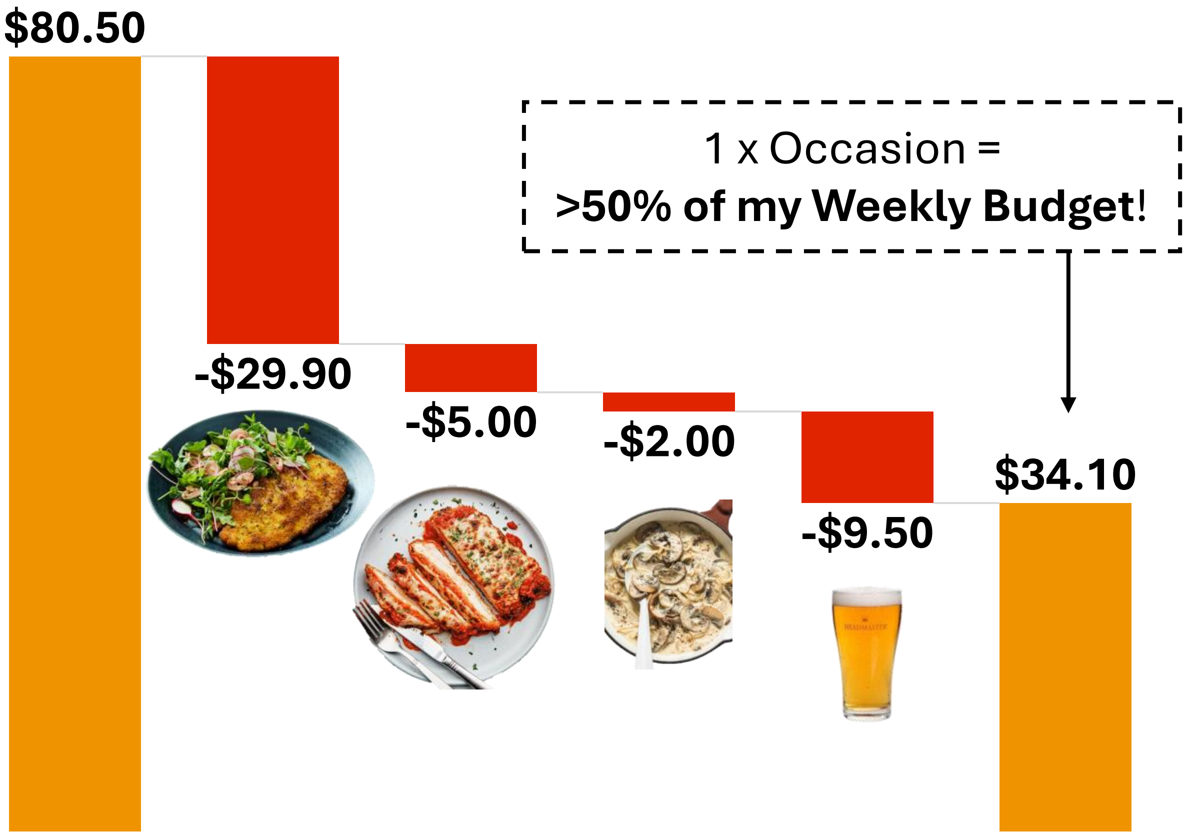
We must remain cognisant of the proportion of the discretionary spend we expect our patrons to pay for our food and drink, as increased costs → less serves/volume per visit

% Mix of Discretionary Spend each Month by Category



Source: CommBank iQ Cost of Living Report 2025

Breakdown of Eating Out & Food Delivery – Weekly



Economic Effects

Defining Value for our Patrons

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Seeking value looks different for different category and segments across all industries and channels; Our patrons are changing the way they shop and find value

Where categories offer regular, substantial discounts ($10+), shoppers are trading up in size to eventually save.

The exception being the very value end of the category who are going the other way to save today

Where the promotional savings are smaller (<$8), or less often, customers are downsizing to save today

$25+ Large Instant Coffee packs only offer a $4-$7 saving, infrequently

Batteries down-sizing in Quality and Size

Nappies down-sizing in Quality and Size

Customers are switching to alternative formats to save

Chilled Pasta into Dry for half the price

Canned Dog Food into the Value end of Chilled

Dishwashing Powder gaining from Tablets

Cheese Slices, back into Blocks of Cheese

Source: CCEP Commercial Insights Team, Combined Independent Grocery Loyalty Data, H12026

Economic Effects

Defining Value for our Patrons

PUB LEADERS SUMMIT 2026

Seeking value looks different for different category and segments across all industries and channels; Our patrons are changing the way they shop and find value

SPEND A LITTLE MORE TO GAIN MORE VALUE	TRADE DOWN TO SAVE TODAY	SWITCHING FORMATS BUT PRESERVE THE OCCASSION
✓ Meal + Drink Deals ✓ Family Meal Bundles ✓ Game-Day Packages	✓ Small Change Food Menu ✓ Tapas Style Snack Menu ✓ Happy Hour ✓ Member/Loyalty Pricing	✓ Pub Meal > Full Service Restaurant ✓ Sport at the Pub > At the Stadium ✓ Switching to Non-Alc Drinks ✓ Buy individual drinks > shouting rounds

Channel Trends

Industry Growth Drivers

Understanding the Commercial Model

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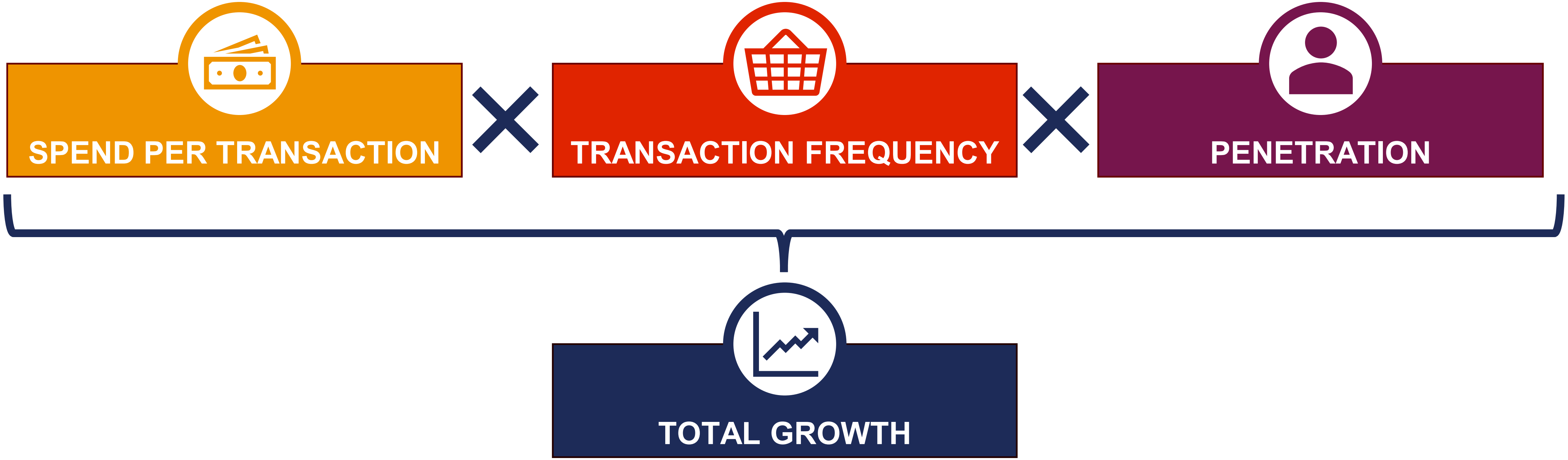
When interpreting the following channel trends, it is important to reiterate the relationship between the following drivers of the commercial model



Industry Growth Drivers

At Home Commercial Model

Corporate stores in growth driven more by frequency then price; Accounting for bigger basket trips, discounters now have a larger average basket spend per trip vs traditional supermarkets

	SPEND PER TRANSACTION		TRANSACTION FREQUENCY		PENETRATION		TOTAL GROWTH	
SUPERMARKETS	$46 *per visit*	+0.2%	95.1 *visits a year*	+0.4%	98.7% *of Australians*	-0.1%	$96.2B	2.3%
DISCOUNTERS	$52 *per visit*	+1.2%	25.6 *visits a year*	+1.2%	93.1% *of Australians*	-0.2%	$27.3B	4.5%
E-COMMERCE	$46 *per visit*	-0.6%	18.3 *visits a year*	+5.0%	60.7% *of Australians*	+0.6%	$11.4B	7.8%

Source: CommBank iQ Market Monitor; CCEP Industry Report, Mar 2026 MAT vs prior year

Industry Growth Drivers

Away From Home Commercial Model

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C&P was in decline for most of 2025 only now coming back into growth driven by fuel panic; QSR continues growth driven by price; FSA fastest growing with lots more headroom for growth

	SPEND PER TRANSACTION		TRANSACTION FREQUENCY		PENETRATION		TOTAL GROWTH	
Petrol & Convenience	$44 per visit	+13.8%	53.6 visits a year	+0.3%	96.1% of Australians	-0.1%	$43.6B	0.6%
Catering	$43 per visit	+4.9%	18.8 visits a year	+0.2%	95.1% of Australians	-0.1%	$17.1B	9.1%
Leisure	$84 per visit	-1.5%	18.4 visits a year	+3.8%	81.9% of Australians	0.0%	$28.2B	5.9%
QSR	$18 per visit	+2.9%	47.5 visits a year	-1.3%	93.2% of Australians	-0.2%	$18.4B	4.6%
Local Trade	$19 per visit	+2.5%	56.1 visits a year	-0.7%	95.7% of Australians	-0.1%	$23.0B	4.9%
Vending	$5 per visit	+3.0%	9.9 visits a year	+1.9%	29.3% of Australians	+0.5%	$0.3B	8.7%
FSA	$43 per visit	+8.5%	27.4 visits a year	+2.8%	40.1% of Australians	+1.3%	$10.4B	17.6%

Source: CommBank iQ Market Monitor; CCEP Industry Report, Mar 2026 MAT vs prior year

Industry Growth Drivers

Licensed Commercial Model

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On Premise saw a strong year of growth backed by consumer desire for experience and events; Conversely Off Premise suffered with strong price increases turning people away

	SPEND PER TRANSACTION		TRANSACTION FREQUENCY		PENETRATION		TOTAL GROWTH	
ON PREMISE	$44 *per visit*	-1.6%	60.6 *visits a year*	+6.4%	96.4% *of Australians*	+0.2%	$57.1B	7.2%
OFF PREMISE	$53 *per visit*	+2.2%	17.6 *visits a year*	-2.9%	72.7% *of Australians*	-1.9%	$15.0B	-1.1%

- Draught beer excise indexation has been frozen now for two years from 4th August 2025;
- The pause on draught beer tax will result in more stable prices for on-premise consumption.

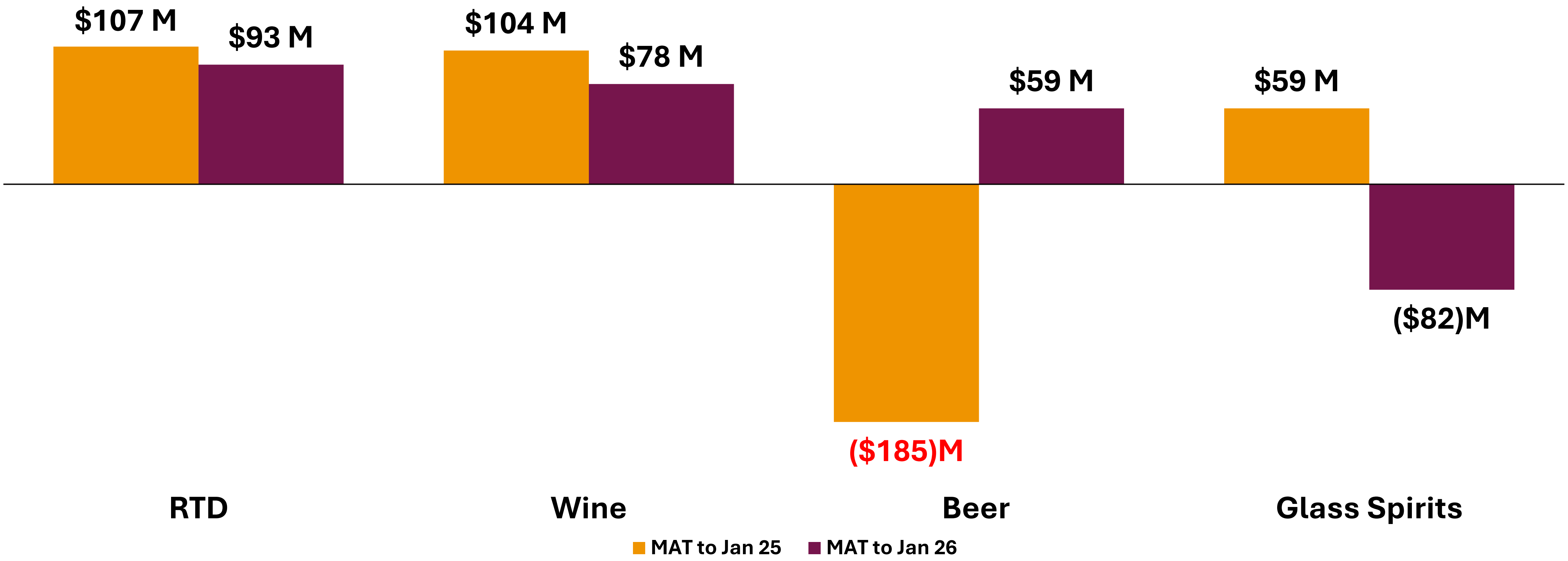
Source: CommBank iQ Market Monitor; CCEP Industry Report, Mar 2026 MAT vs prior year

Licensed Industry Spotlight

Category & Segment Growth

RTD and Wine maintain low growth and the growth is slowing from 2025 into 2026; Beer seeing slight growth again driven by the contemporary segment; Spirits back in decline

2-Year Growth Contributions by Liquor Category



Source: Circana MarketEdge Retail Liquor Weighted, Data To 05/01/25 and 04/01/26; Showing dollars growth % change vs YA and actual dollar change (millions)

Licensed Industry Spotlight

Category & Segment Growth

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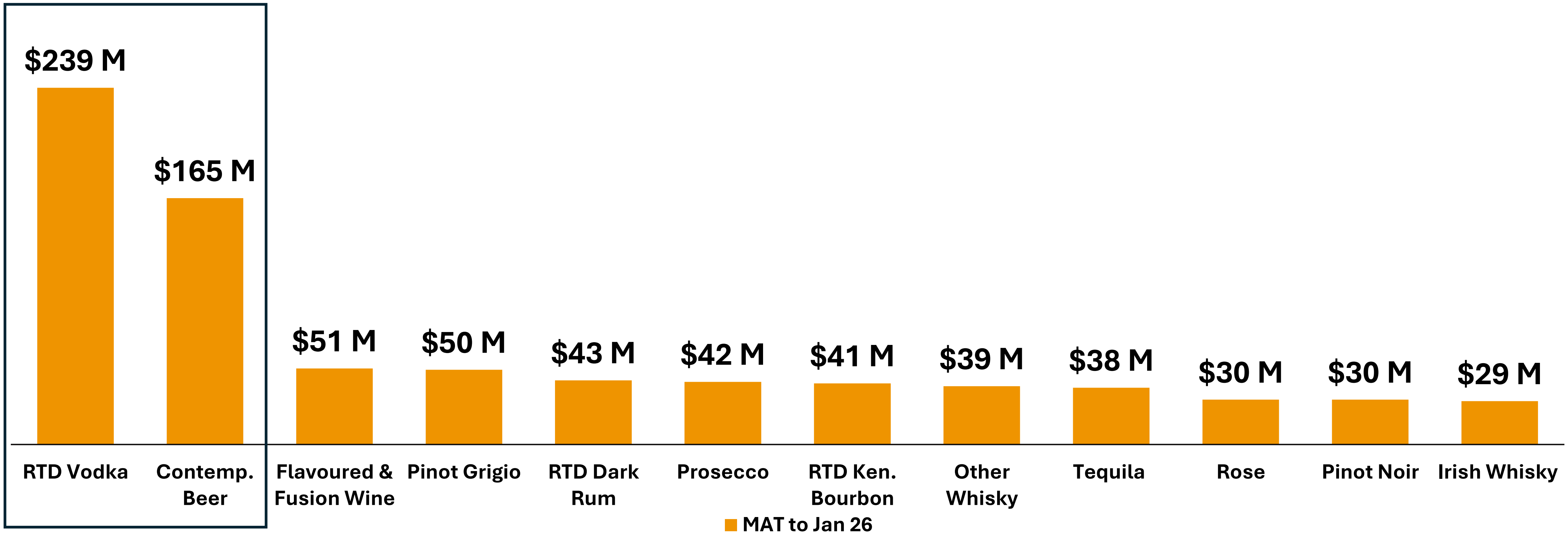
The top 2 growth contributing segments (contemp. Beer and RTD Vodka) have generated over $404M in the last 2-years; The rest of the top segments contributing $363M in that same time

Top 12 performing retail liquor segments – Growth Contribution $ vs 2-YA



Source: Circana MarketEdge Retail Liquor Weighted, Data To 04/01/26; vs. 2YA

Licensed Industry Spotlight

Category & Segment Growth

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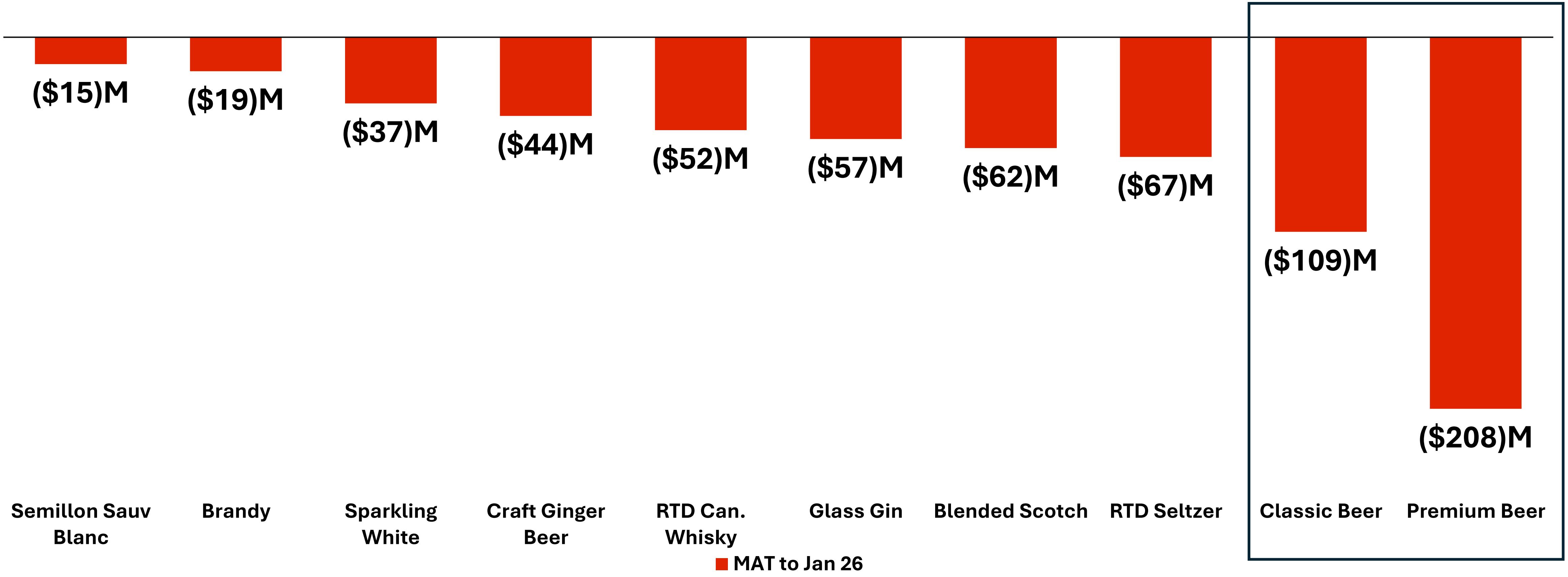
There has also been consistency among the challenged segments too, with Classic Beer and Premium Beer declines effectively offsetting any growth seen from the rest of the Beer category

Top 12 under-performing retail liquor segments – Decline $ vs 2-YA



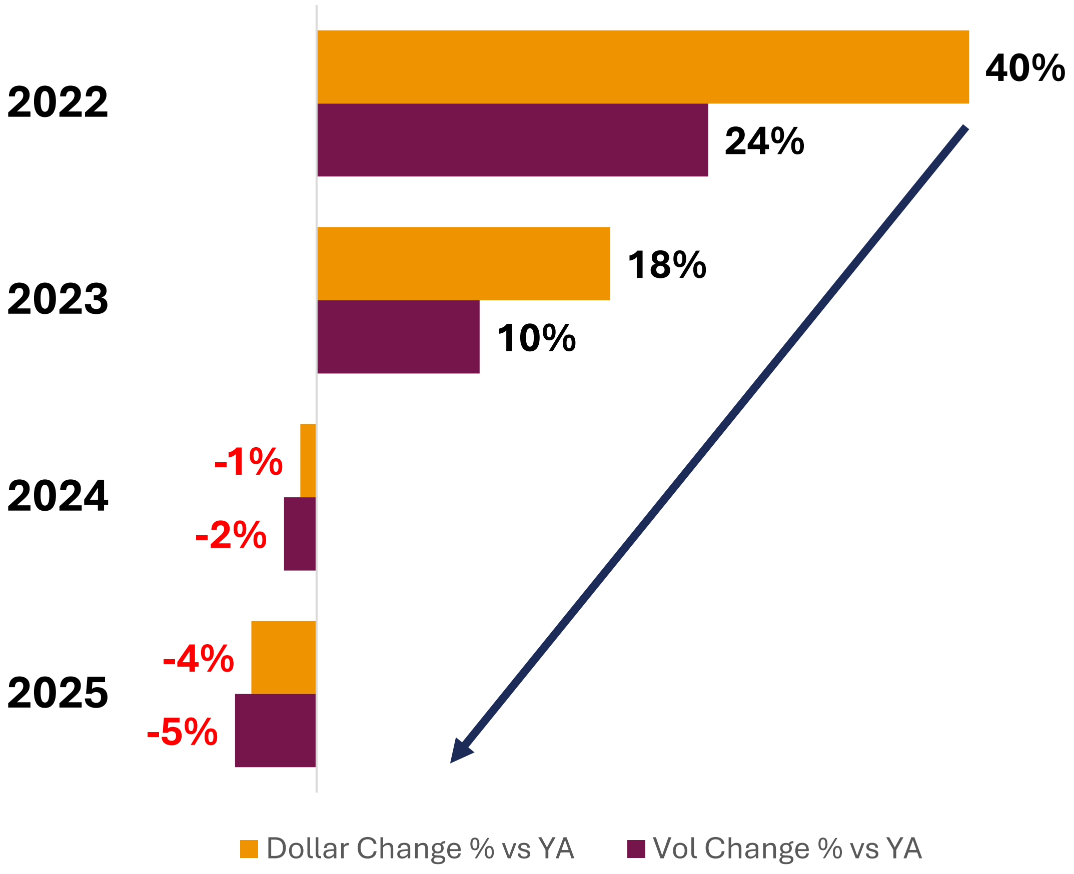
Source: Circana MarketEdge Retail Liquor Weighted, Data To 04/01/26; vs. 2YA

Licensed Industry Spotlight

Non-Alcoholic Beverages

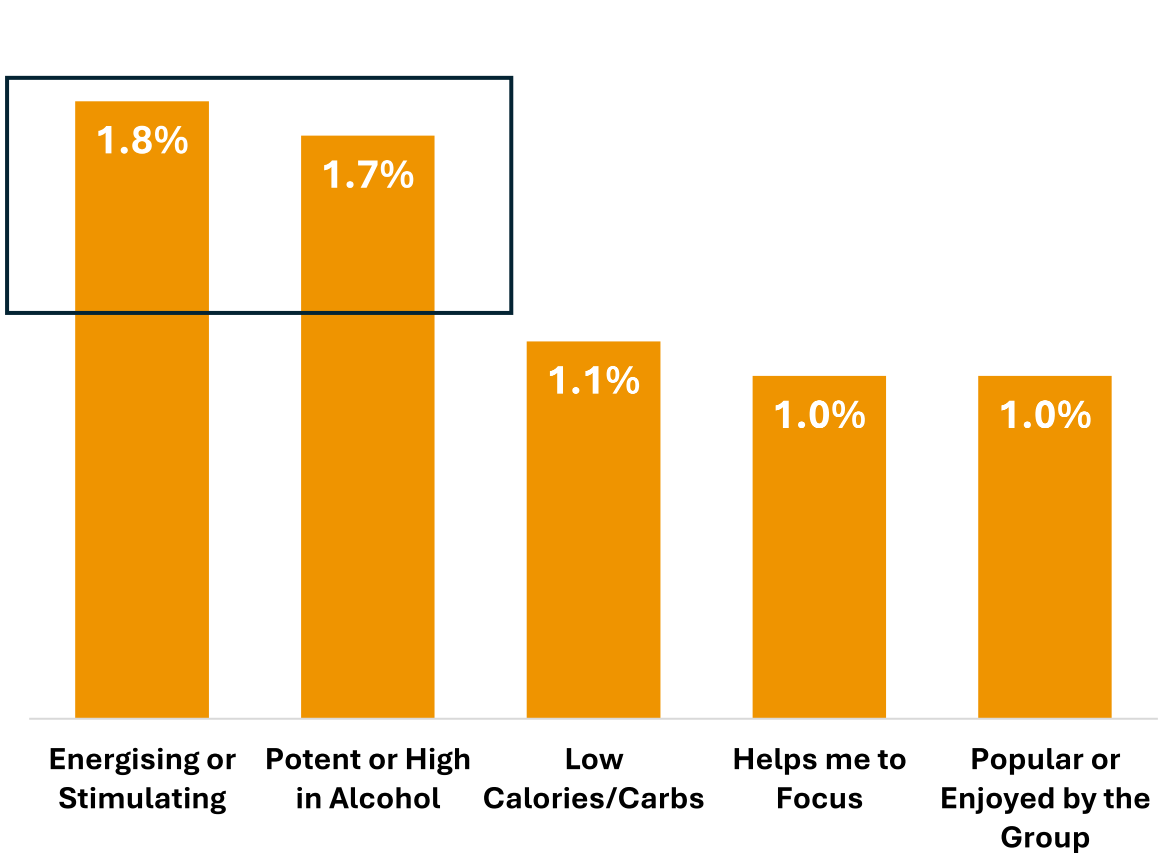
The fastest growing functional needs in liquor directly contradict the main benefit of “zero” alcohol beverages; Zero Alcohol has lost all sales momentum over the last 2-years

Total Zero Alcohol Sales & Vol Change over last 4-years



Source: Circana MarketEdge Retail Liquor Weighted, Data To 04/01/26; vs. 2YA

5 Fastest Growing Functional Needs: 2022-2025



Source: Growth Scope 2022-2025; showing percentage point change over 3-yrs

Licensed Industry Spotlight

Off Premise Retailer Comparison

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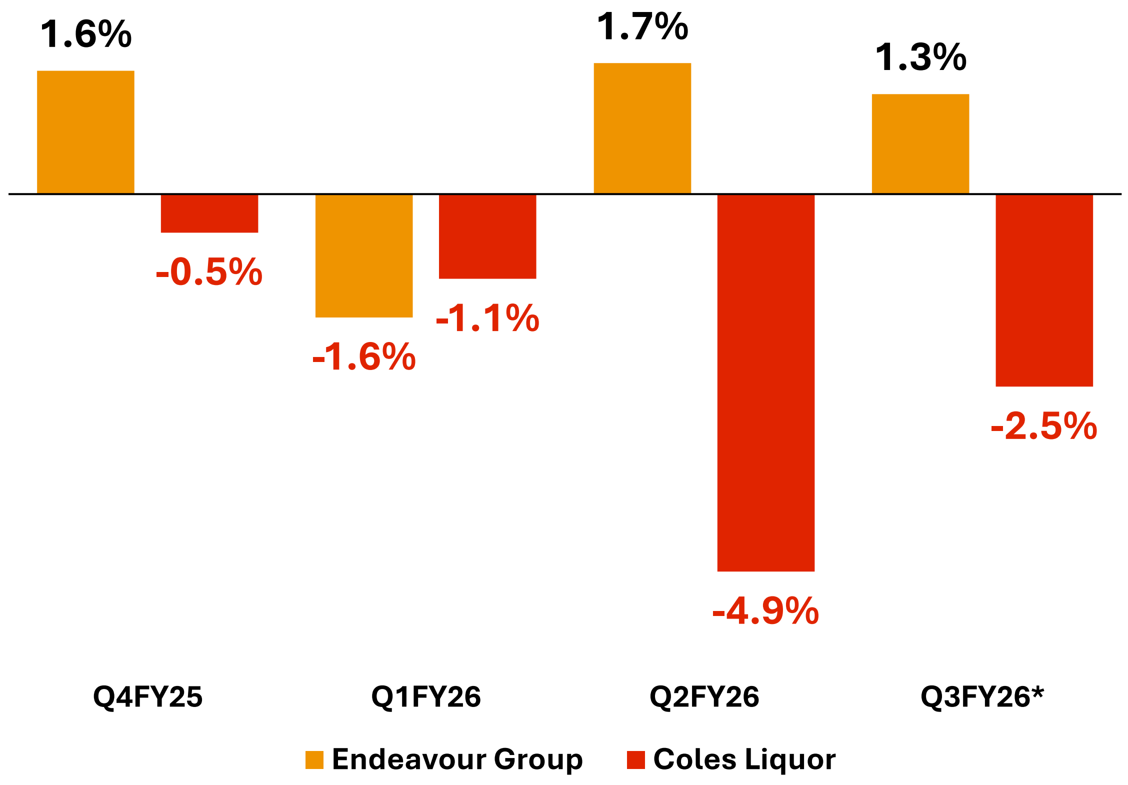
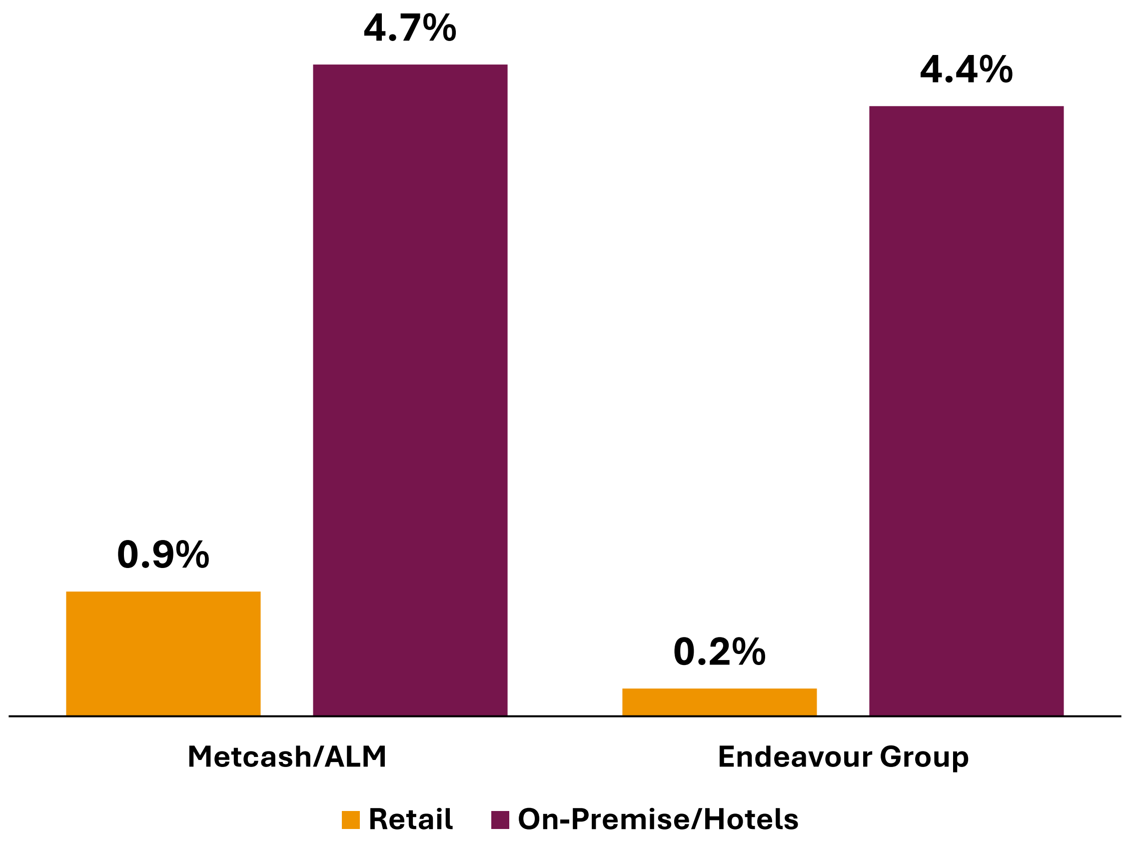
Off-Premise retailers are experiencing declines or slight growth but margin compression; Yet in On-Premise experiencing relatively strong growth bolstered by key social occasions

Corporate Liquor Retailer Comparison – Dollar Growth by FY QTR



Source: Retailer Investor Presentations; Endeavour, March 2026; Coles Liquor, February 2026; *Covers first seven weeks

Corporate Comparison of Off-Premise Growth vs On-Premise Growth



Source: Retailer Investor Presentations; Endeavour, March 2026; Metcash, December 2025; *Wholesale sales to retail & contract customers; Metcash half year coverage = May – October

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On Premise Category Lens

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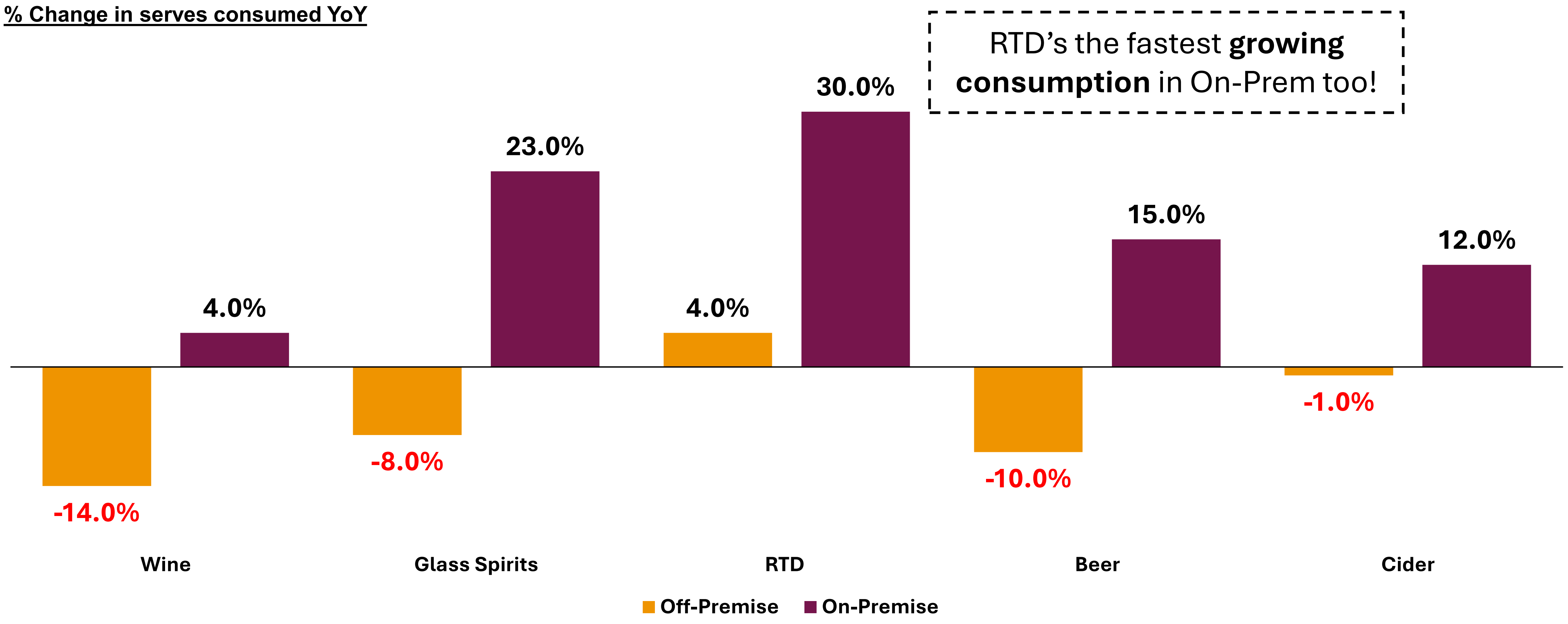
All liquor categories have seen positive consumption volume growth in the on-premise channel, whereas ONLY RTD's have seen consumption growth in off-premise



Source: Growth Scope 2024-2025

How is liquor consumption shifting for Australians?

Licensed Industry Spotlight

Alcohol Consumption Shifts

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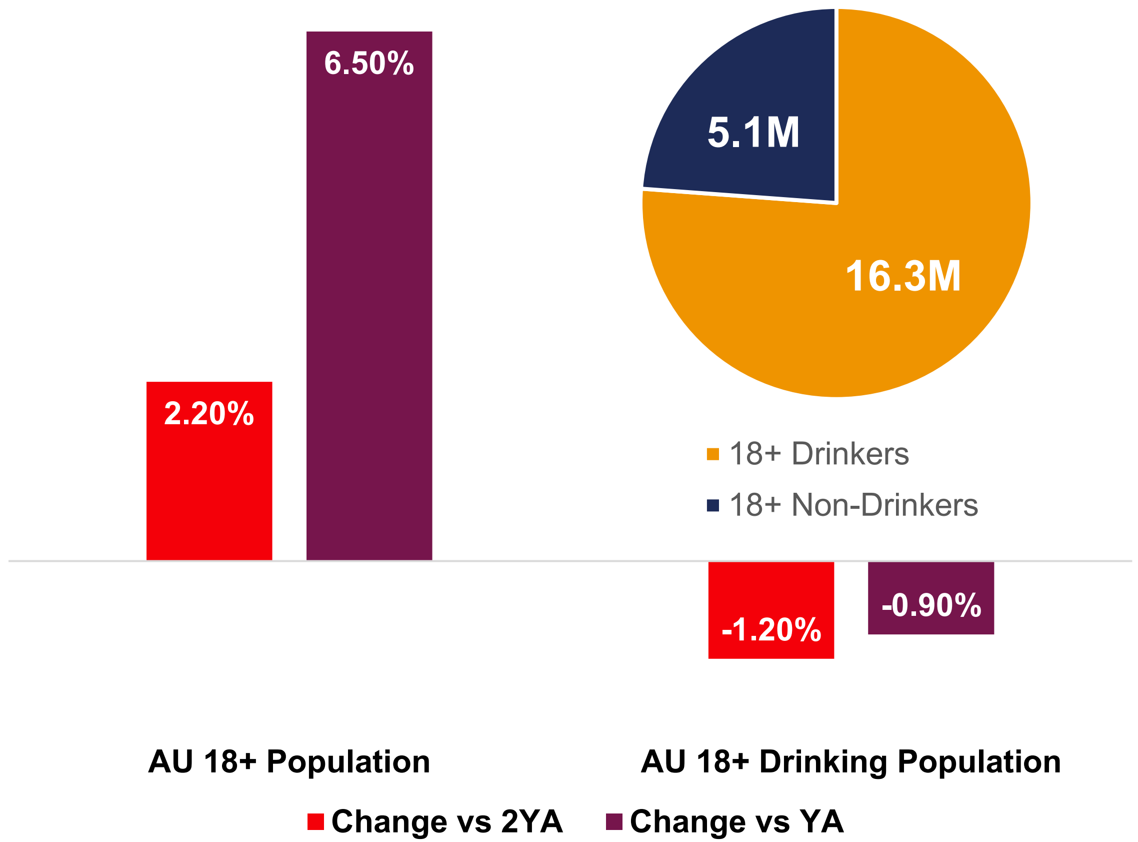
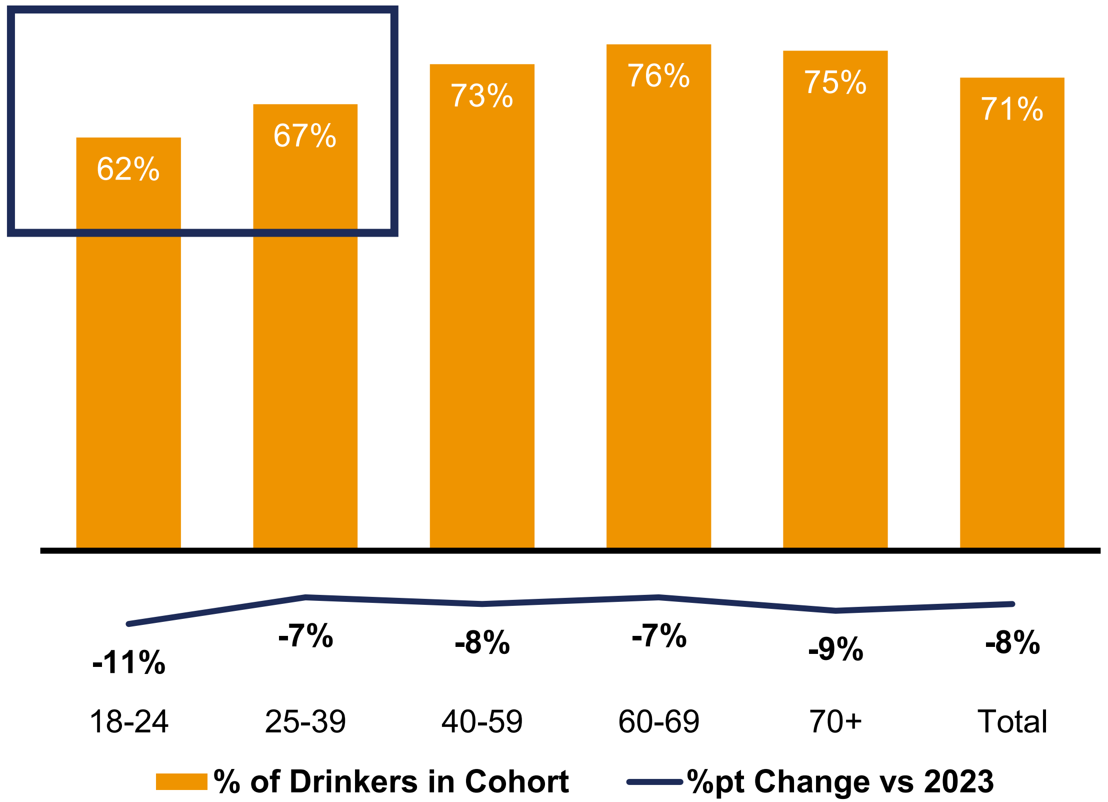
Disparities in population growth vs drink growth underpin the gap in alcoholic beverages; The younger demographic under-index in drink population, restricting occasions and future growth

Australian Population vs Australian Drinking Population



Source: Growth Scope 2023-2025; ABS Population Statistics

% of Drinkers in Age Cohort and Change % vs 2023



Source: Growth Scope 2023-2025;

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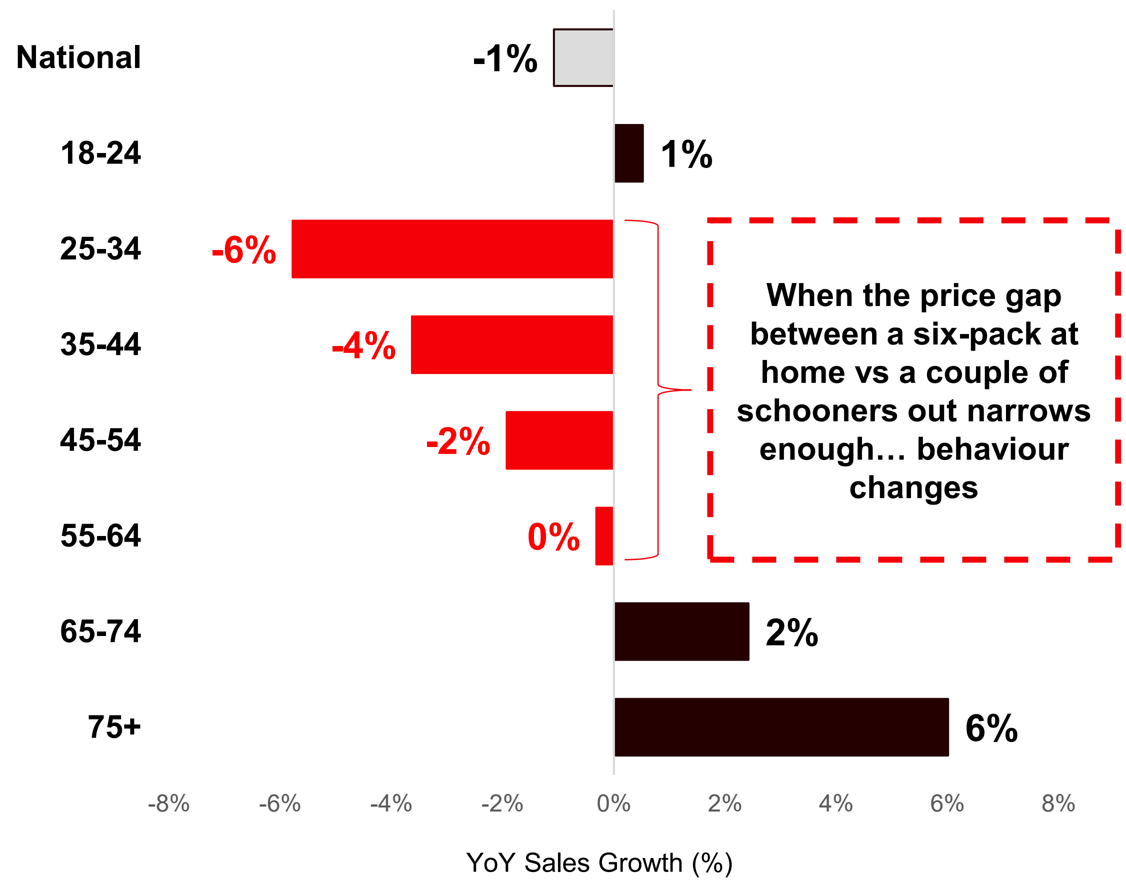
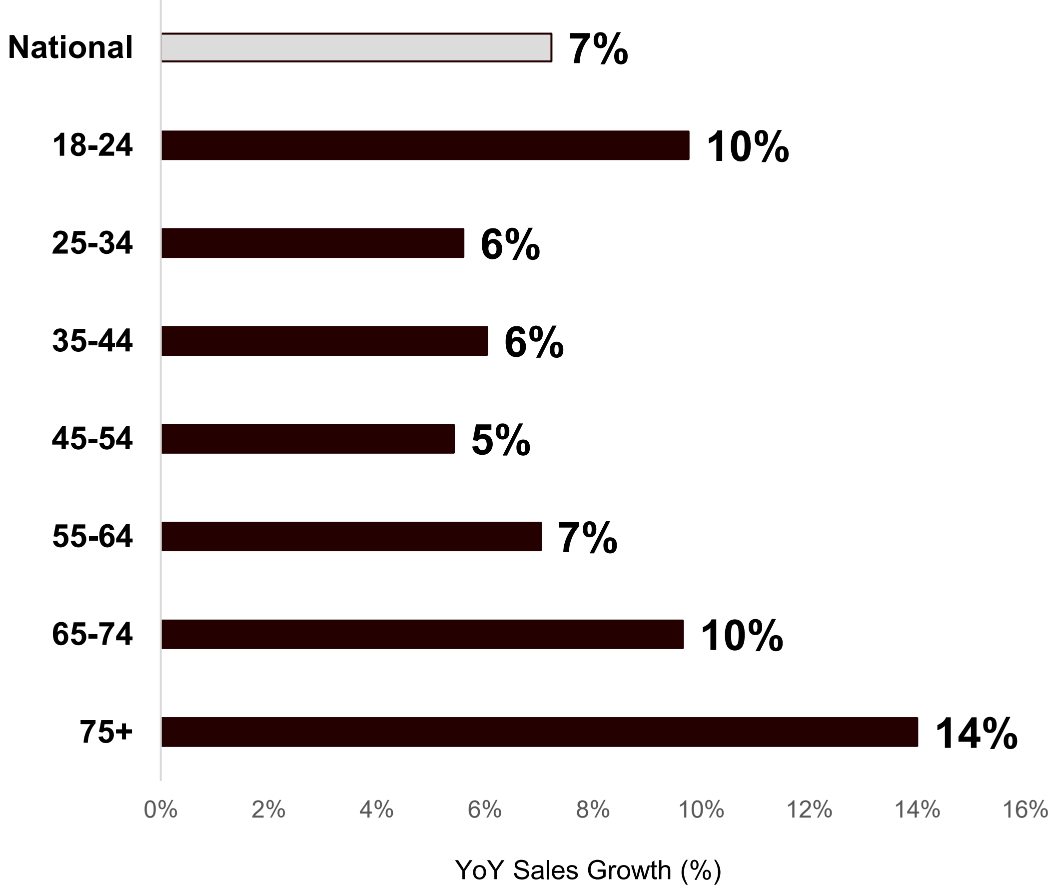
Sub Channel Trends by Age Demographic

It is specifically younger shoppers that are lapsing the most from the off-premise channel, yet the silver-lining is that their spend remains in modest growth in on premise

Off Premise Industry Growth by Age Bracket



On Premise Industry Growth by Age Bracket



Source: CommBank iQ Market Monitor; CCEP Industry Report, Mar 2026 MAT vs prior year

Licensed Industry Spotlight

Alcohol Consumption Barriers

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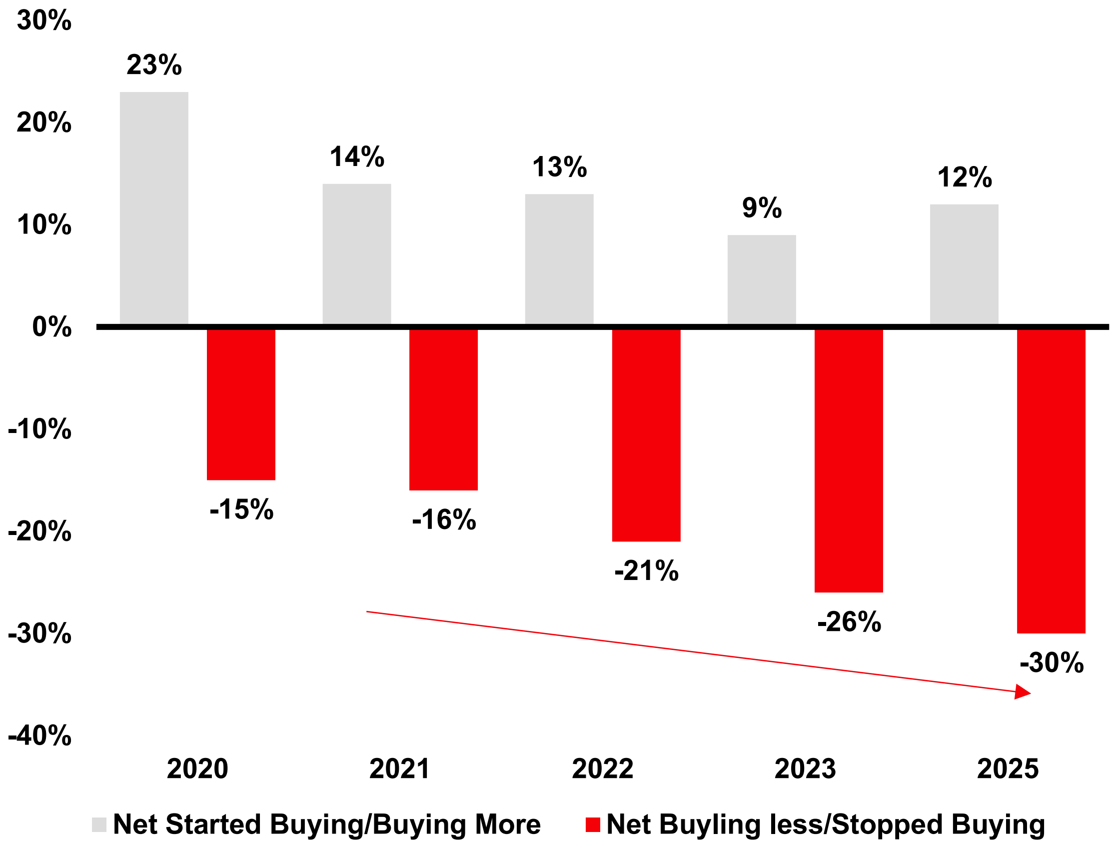
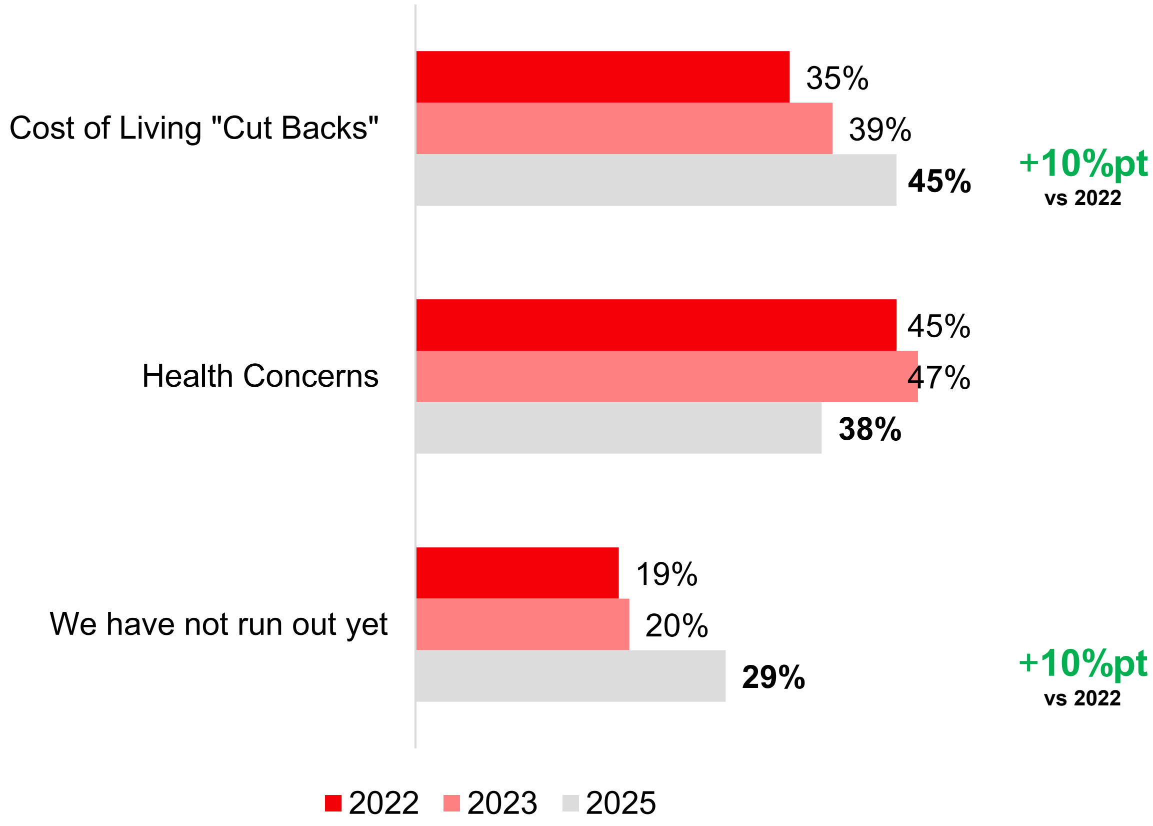
Cost of Living is still the #1 driver of alcohol consumption decline in Australia; The increase in stock-piling behaviour can result in overall consumption decline

Overall purchase of alcoholic beverages vs previous read



Source: Circana Shopper Panel Liquor Surveys, August 2020, n = 1,333; December 2021, n = 1,402; December 2022, n= 1,487; November 2023, n = 1,669; January 2025, n = 1,391;

Top 3 reasons WHY AU drinkers have bought less/stopped buying



Source: Circana Shopper Panel Liquor Surveys, December 2022, n= 1,487 & 332; November 2023, n = 1,669 & 441; January 2025, n = 1,391 & 404;

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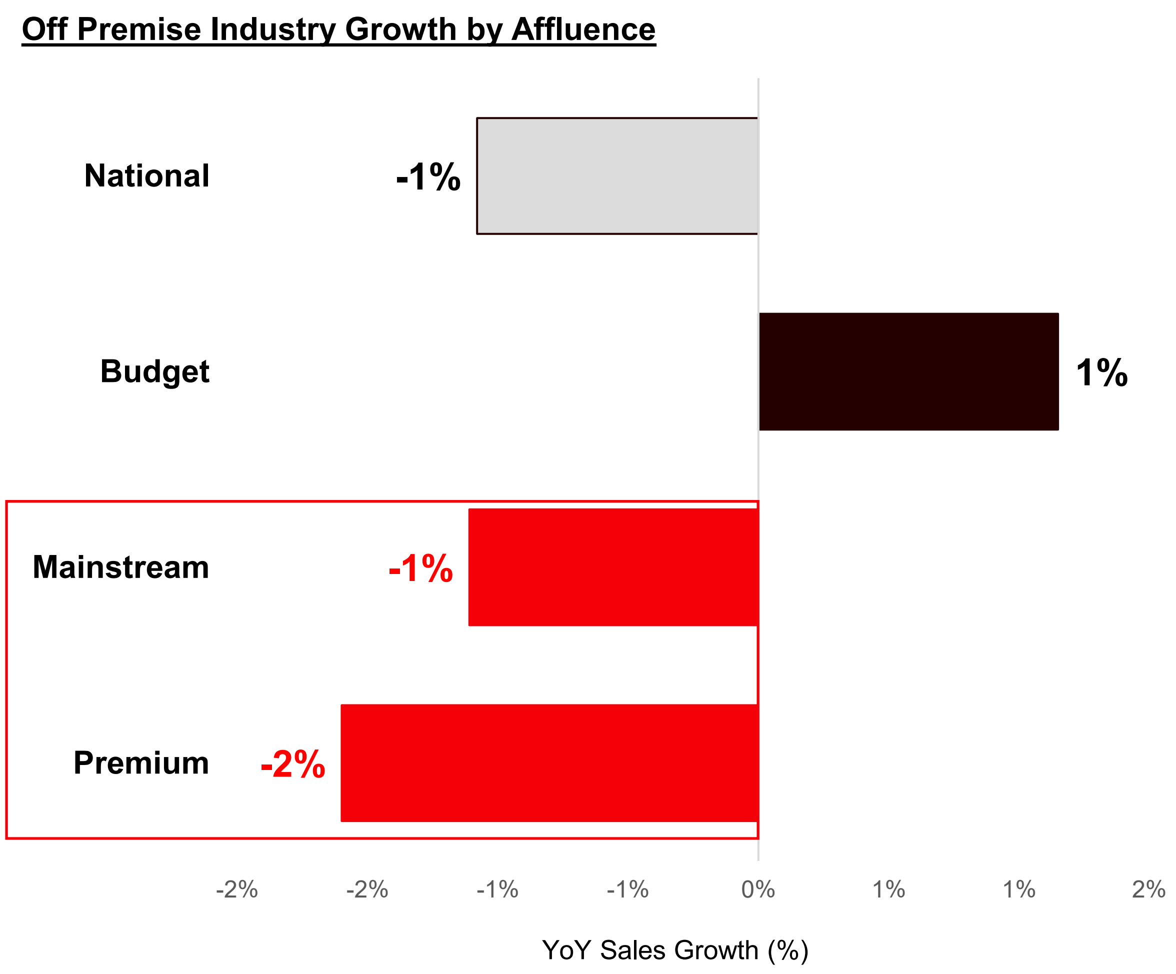
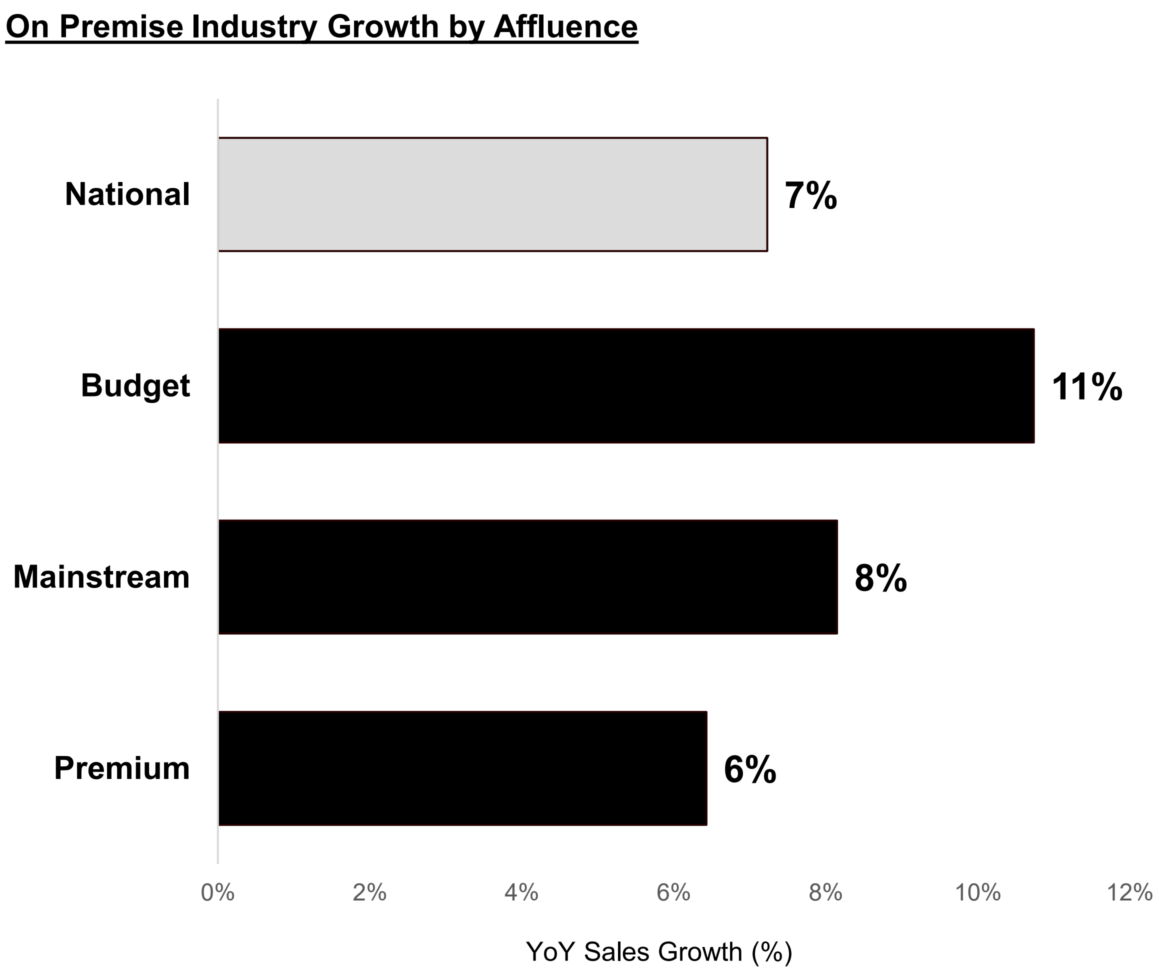
Sub Channel Trends by Affluence

Budget shoppers are **habit driven;** Premium shoppers are **occasion driven;** Off Premise is challenged to recover the mainstream and premium shoppers through increased visitation





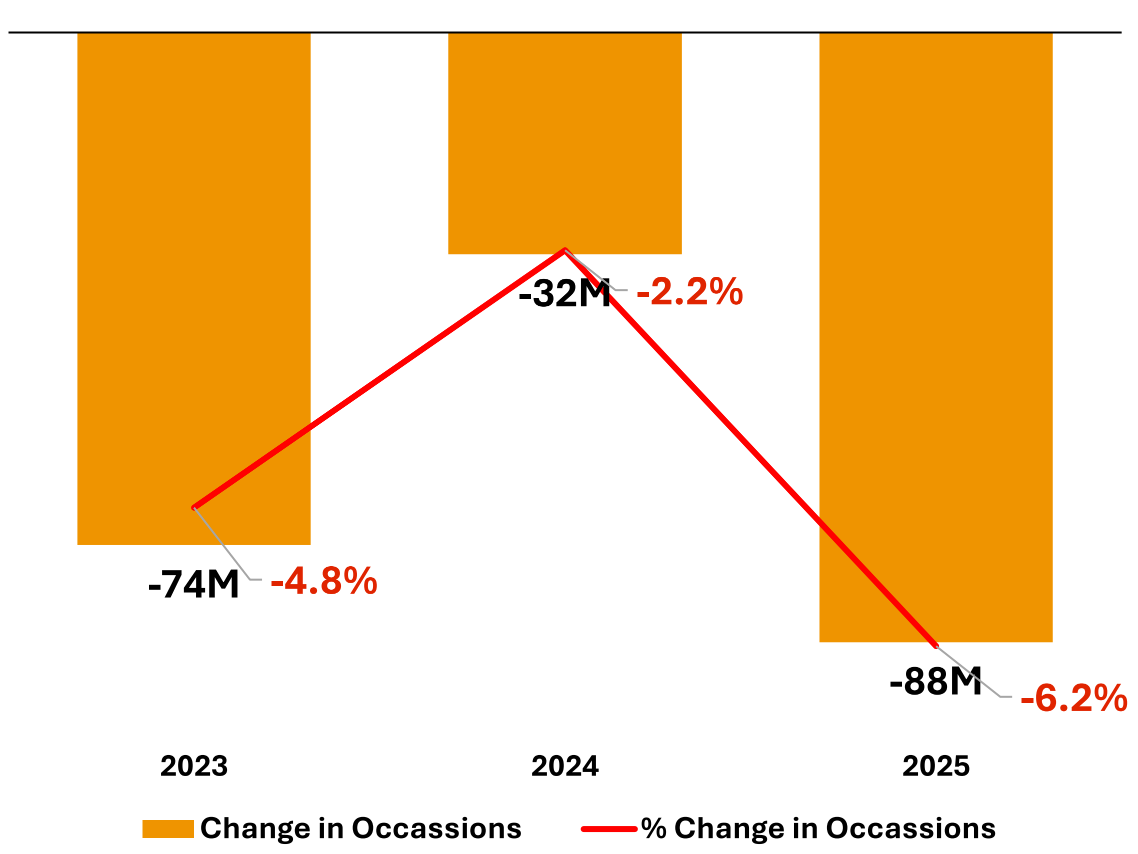
Source: CommBank iQ Market Monitor; CCEP Industry Report, Mar 2026 MAT vs prior year

Licensed Industry Spotlight

Occasion Based Selling

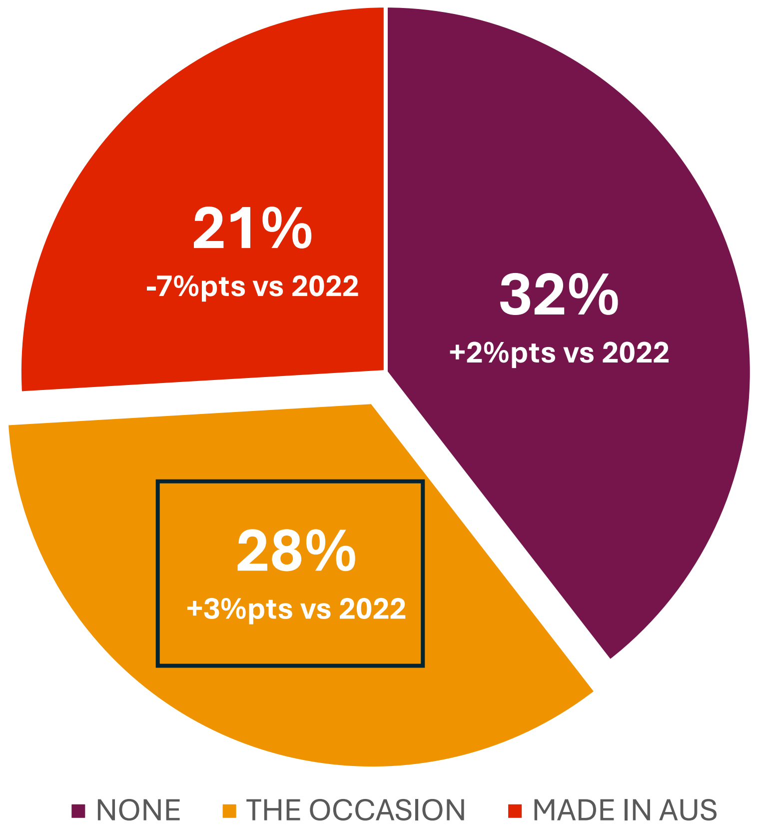
There was a steeper decline in total liquor occasions in 2025; Yet driving occasions is key to success in tough economic times as patrons state this is what drives them to pay more

% Change in Liquor Occasions – Last 3-Years



Source: Growth Scope Consumer Occasions Modelling, 20232-2.25

TOP 3 factors that would make AU Drinkers consider paying more



Source: Circana Shopper Panel Liquor Surveys, December 2022, n= 1,487; January 2026, n = 1,292

Licensed Industry Spotlight

Occasion Based Selling

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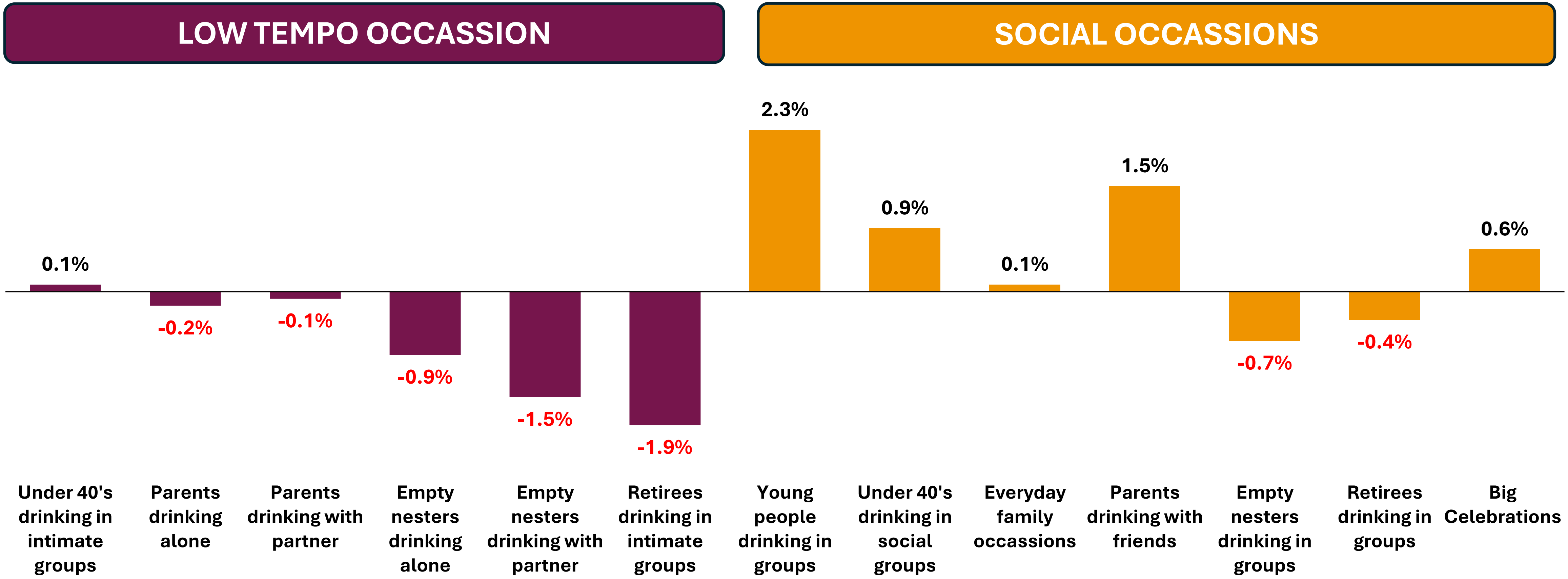
Penetration is shifting more towards social occasions driving overall more volume growth through these types of occasions despite them being less frequent than low tempo occasions

2-year %pt change in "demand zone" penetration



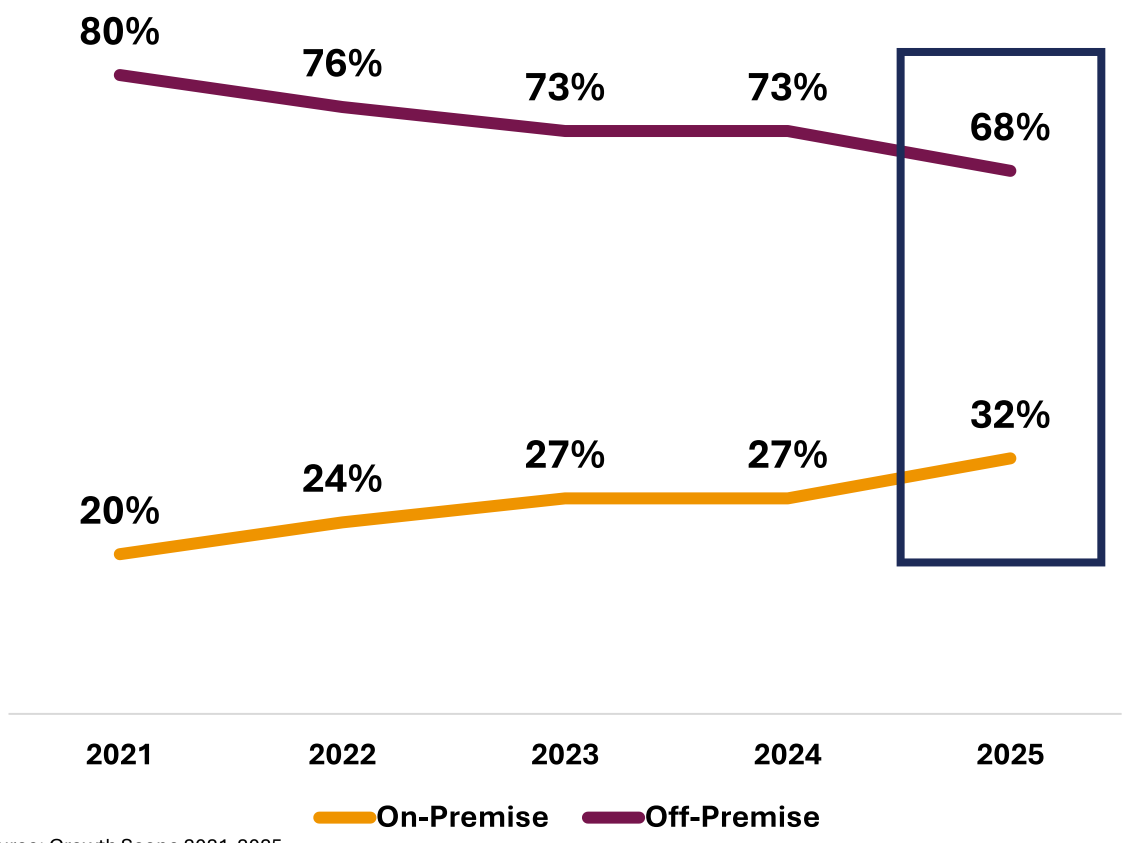
Source: Growth Scope Consumer Occasions Modelling, 2023-2025

Licensed Industry Spotlight

Occasion Based Selling

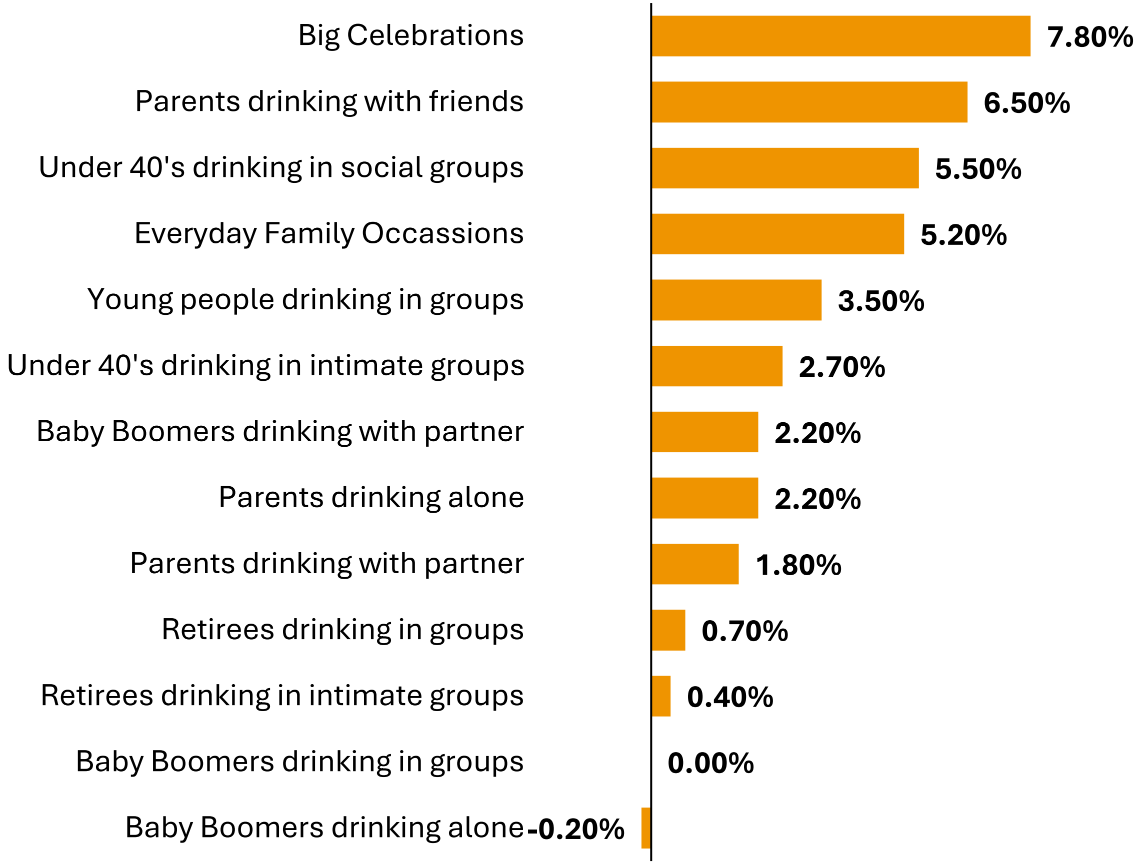
On premise occasion penetration has surpasses pre-COVID levels in the last year, with all except one key occasion seeing gains in on-premise penetration

On vs Off Premise Penetration on most recent occassion



Source: Growth Scope 2021-2025

%pt change in proportion of occasions in On-Premise



Source: Growth Scope 2025 vs 2024

Industry Opportunities

Commercial Implications

Key Opportunities for Licensed Industry

PUB LEADERS SUMMIT 2026

We must be aware of the macro trends to align on what the problems are we are trying to solve, so that we develop solutions in service of addressing them and ensure long-term growth

IDENTIFIED MACRO INSIGHT

POPULATION IS THE MOST DIVERSE IT HAS EVER BEEN IN AUSTRALIAN HISTORY	DISCRETIONARY SPEND SQUEEZED THROUGH RATE HIKES AND INFLATION PRESSURE	EATING OUT SPEND HISTORICALLY FUNNELS TO GROCERY IN HARDER ECONOMIC TIMES

KEY QUESTIONS TO SOLVE FOR

HOW CAN WE ADJUST OUR EXECUTION BY VENUE TO CATER BETTER FOR THE DEMOGRAPHICS OF EACH AREA?	HOW CAN WE ILLUSTRATE VALUE & BUILD TRANSACTION SIZE THROUGH OUR MEAL & DRINK OFFERS?	HOW CAN VENUES SUSTAIN VISITATION THROUGH SOCIAL OCCASSIONS BY CAPATILISING ON KEY EVENTS?

KEY OPPORTUNITY #1

HOW CAN WE ADJUST OUR EXECUTION BY VENUE TO CATER BETTER FOR THE DEMOGRAPHICS OF EACH AREA?

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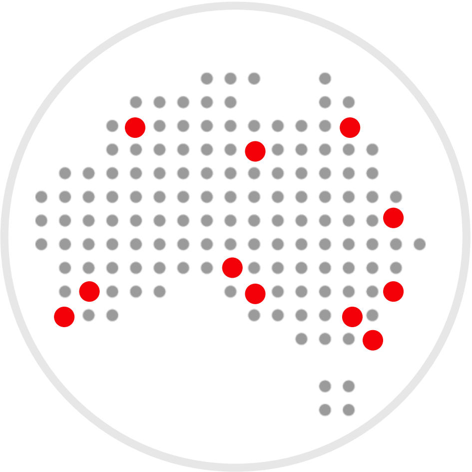
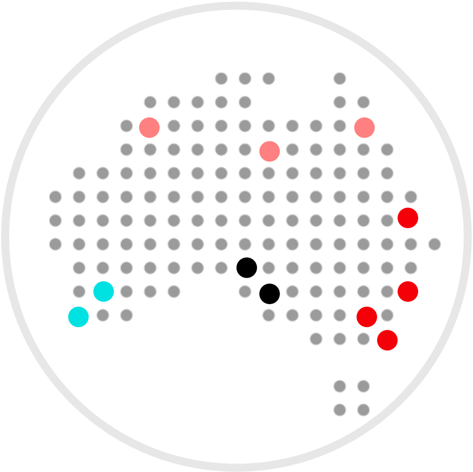
Industry Opportunities

Clustered Segmentation

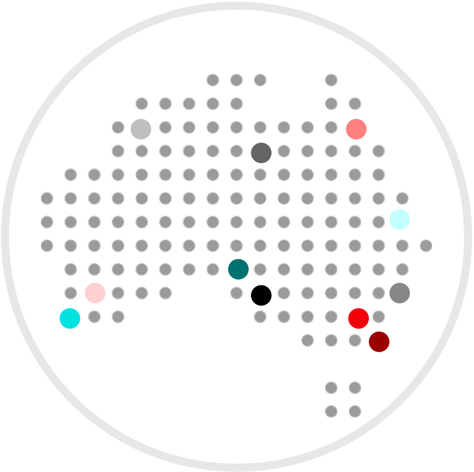
Australia is a diverse nation of +28M people and there are several factors that contribute to this diversity: geography, affluence, lifestyle, ethnicity ect.



National Approach
One size fits all



Clustered Approach
Similar stores placed into clusters



Localised Approach
Individual store strategy

AVERAGES
Mass Distribution

OUTLIERS
Meaningful Distribution

LOW — Reliance on data & insights — HIGH

Industry Opportunities

Clustered Segmentation

PUB LEADERS
SUMMIT 2026

By combining both micro data and macro data you can expand your ‘field of vision’ and use these insights to tailor every level of the strategy for your venue

Hawthorn East
VIC 3146

01 Scan Data

The venue in 3146 over indexes with Sparkling Water, Seltzers and Premium Beer

02 Shopper Data

3146 shoppers are more likely to pair their meals with the drink; Shoppers prefer to order through QR codes

03 Credit Card Transaction Data

Residents of 3146 spend 2x the amount on restaurants vs. fast food. There is high levels of growth on “events & tourism” spend

04 ABS | Census data

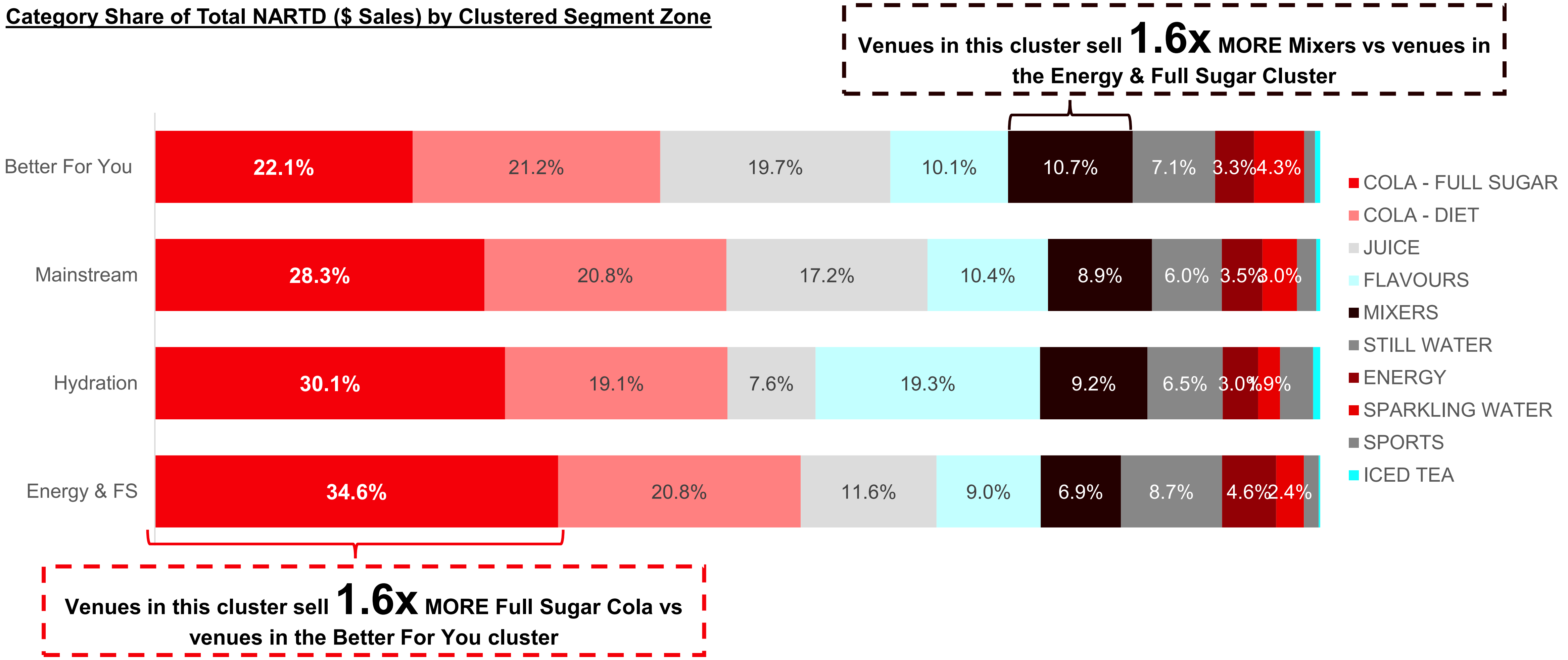
Postcode 3146 is a SEIFA score 10, with annual income of $129k, 36.4% university educated etc….

Industry Opportunities

Clustered Segmentation – NARTD Example

The demographics of the area dictates the over-trade in certain categories; The opportunity therefore lies in how a venue can capitalise on this over-trade through range and execution

Category Share of Total NARTD ($ Sales) by Clustered Segment Zone



Source: CCEP Commercial Insights; Internal Sales Data by Venue Cluster

Industry Opportunities

Clustered Segmentation – Case Study

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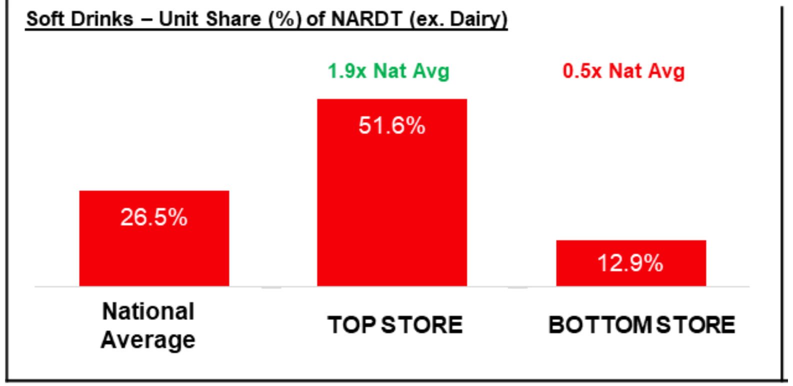
Insight

The same POG used Nationally for 600 outlets

The layout represents fair share against the national average mix.

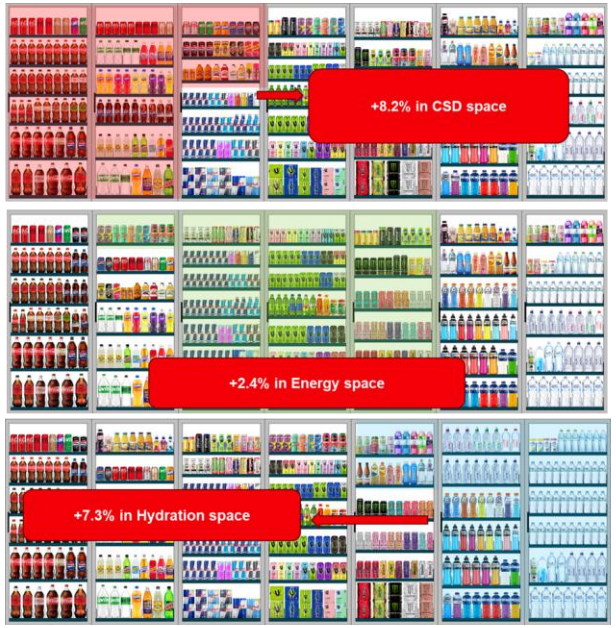
HOWEVER, a portion of stores vary significantly from this national average.

SOFT DRINKS



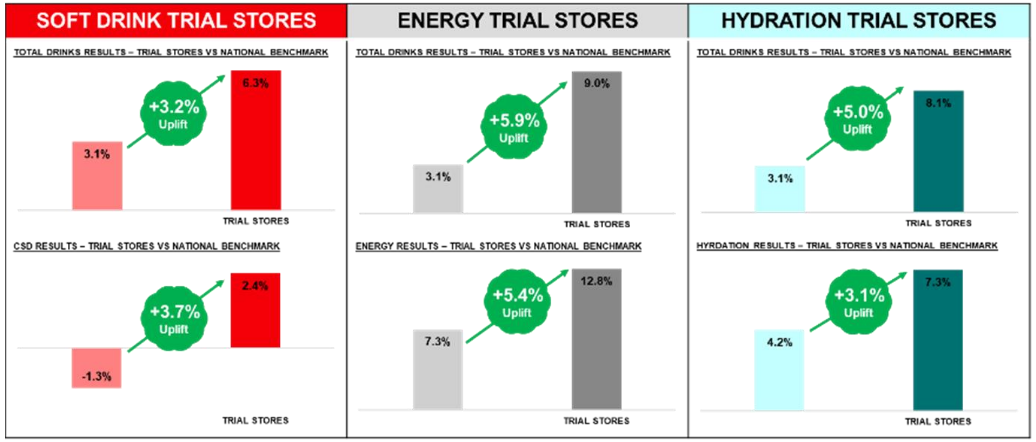
Action

3 x clustered POGs were designed flexing the range and space based on the over-trade for specific stores

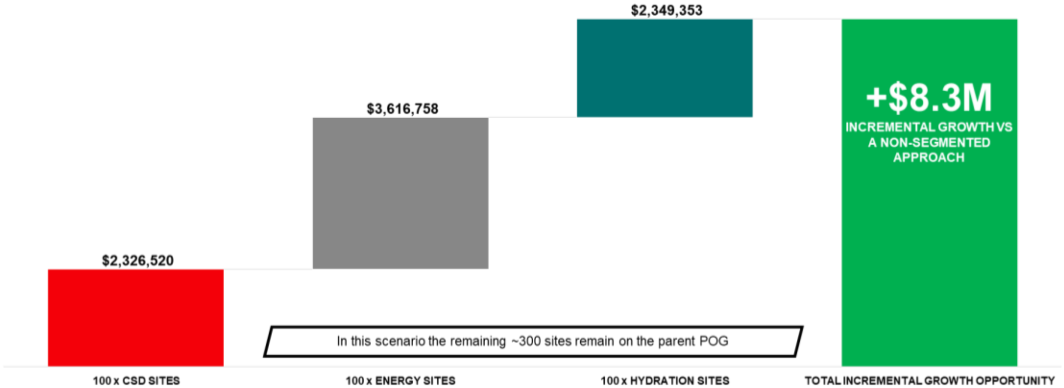


Results

The clustered stores were benchmarked to all-star performing stores and each cluster saw significantly stronger growth over the trial period and now looking to be roll-out across half the network



2.0x growth vs. benchmark	2.9x growth vs. benchmark	2.6x growth vs. benchmark



KEY OPPORTUNITY #2

HOW CAN WE ILLUSTRATE VALUE & BUILD TRANSACTION SIZE THROUGH OUR MEAL & DRINK OFFERS?

Industry Opportunities

Meal & Drink Bundling

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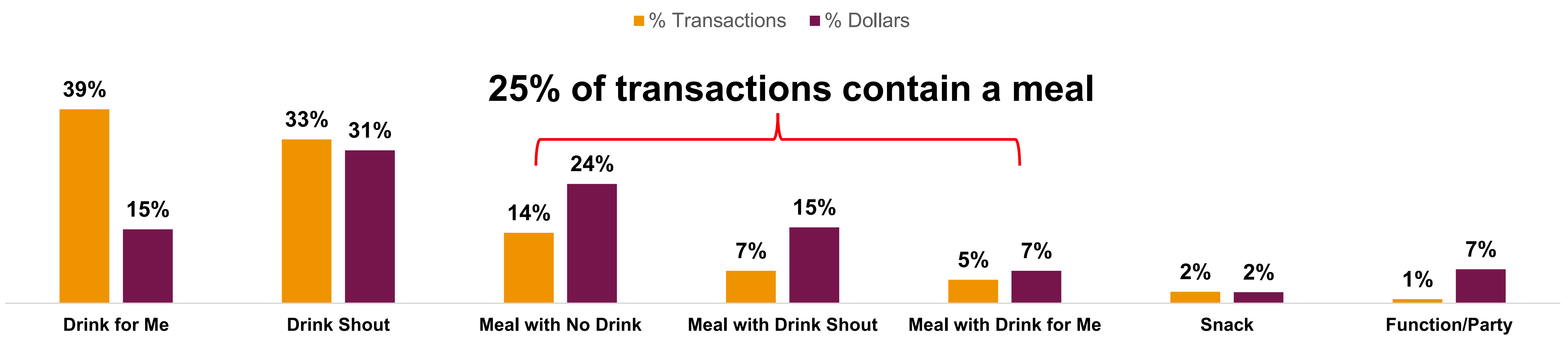
Whilst a single beverage is the most common transaction type, a quarter of transactions contained a meal BUT less than HALF of those transactions also contained a drink



Purchased a **single serve beverage**

Purchased a **multi-serve** and/or **2 or more single serve beverages**

Purchased a **meal with no drink**

Purchased a **meal** with a **multi-serve** and/pr **2 or more single serve beverages**

Purchased a **snack** (may or may not include a beverage)

Purchased a **meal** and a **single serve beverage**

Large transactions

$

Source: CCEP Commercial Insights; Licensed Group A Store-Level Transaction Data 2025

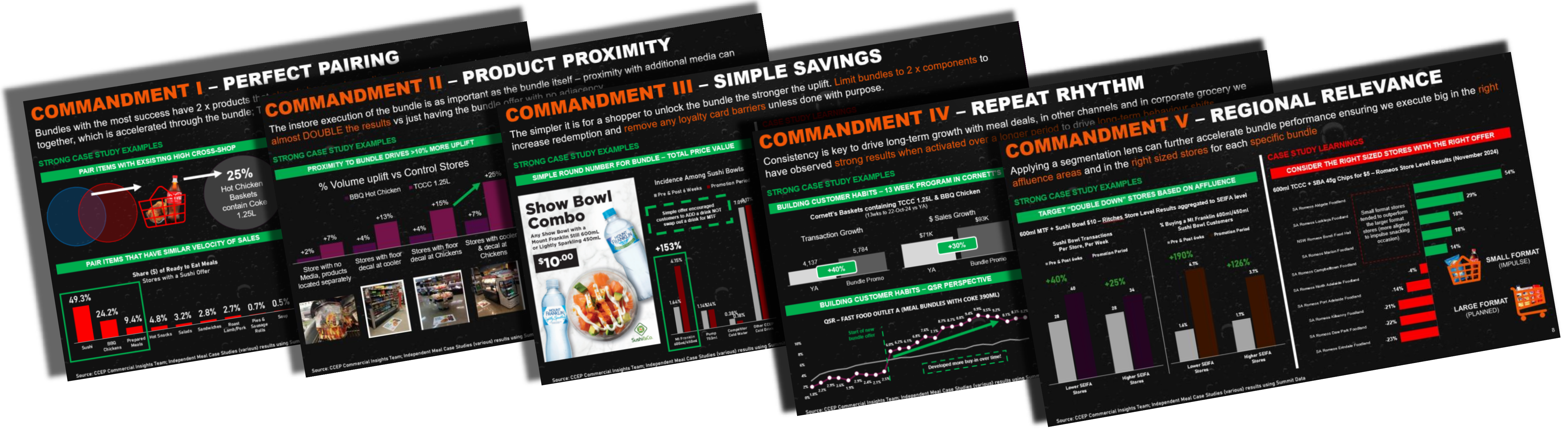
Industry Opportunities

Meal & Drink Bundling

PUB LEADERS SUMMIT 2026

At CCEP we have developed a “Bundle Bible” from a Meta Analysis of over 25 post meal bundle campaign reports; These core principles now guide how we plan and execute our bundles

I	II	III	IV	V
PERFECT PAIRING	*PRODUCT PROXIMITY*	*SIMPLE SAVINGS*	*REPEAT RHYTHM*	*REGIONAL RELEVANCE*



Industry Opportunities

Meal & Drink Bundling – Case Study

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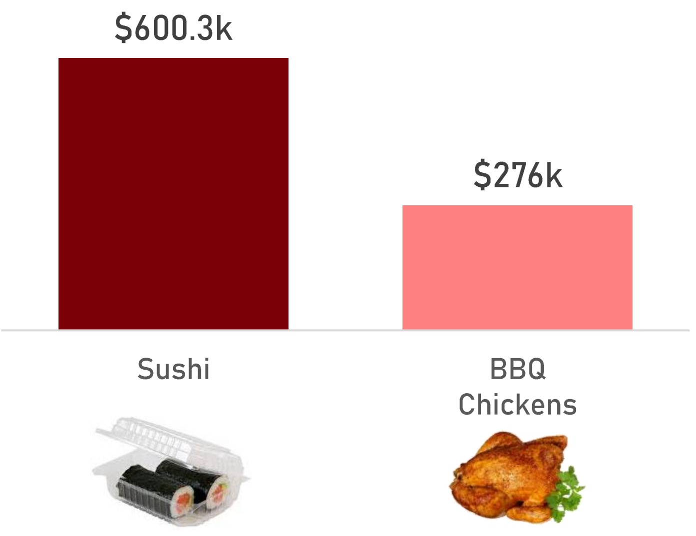
Insight	Action	Results

Annual Sales per Store



Sushi outsells BBQ Chickens by 2:1

9 in 10 Sushi customers do not buy a Cold Drink

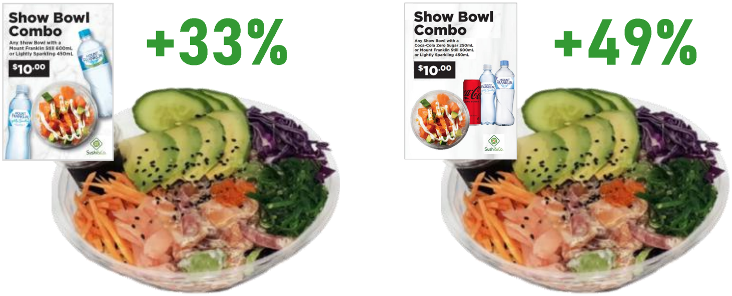
Cooler space exists for a Cold Drink offer

IGA Winter 2025 Promotion

Growth across all stores & day-parts. Most of all;

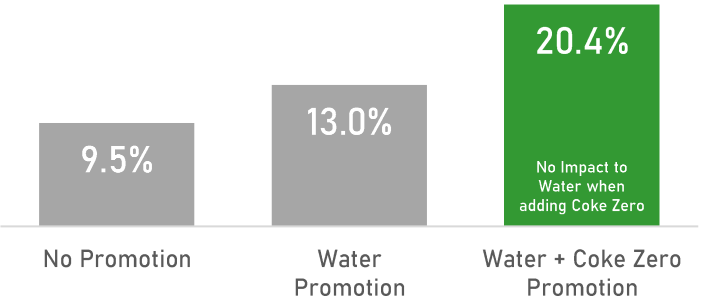
Weekday Lunch | Meal Only Purchases | Low SEIFA (More headroom)

Promotion Drove Food Sales



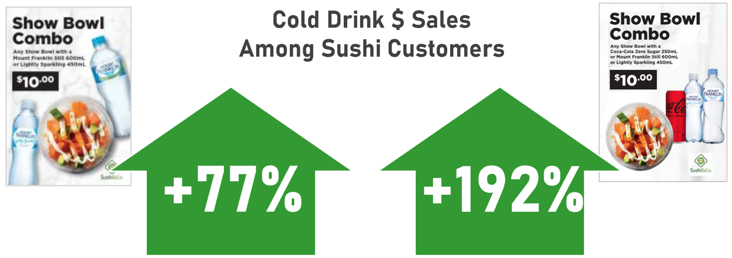
+2x Sushi customers bought a Cold Drink

Sushi Customers Buying a Cold Drink



Cold Drink Revenue 3x among Sushi Customers

Cold Drink $ Sales Among Sushi Customers



KEY OPPORTUNITY #3

HOW CAN VENUES SUSTAIN VISITATION THROUGH SOCIAL OCCASSIONS BY CAPATILISING ON KEY EVENTS?

Industry Opportunities
Key Selling Week Execution

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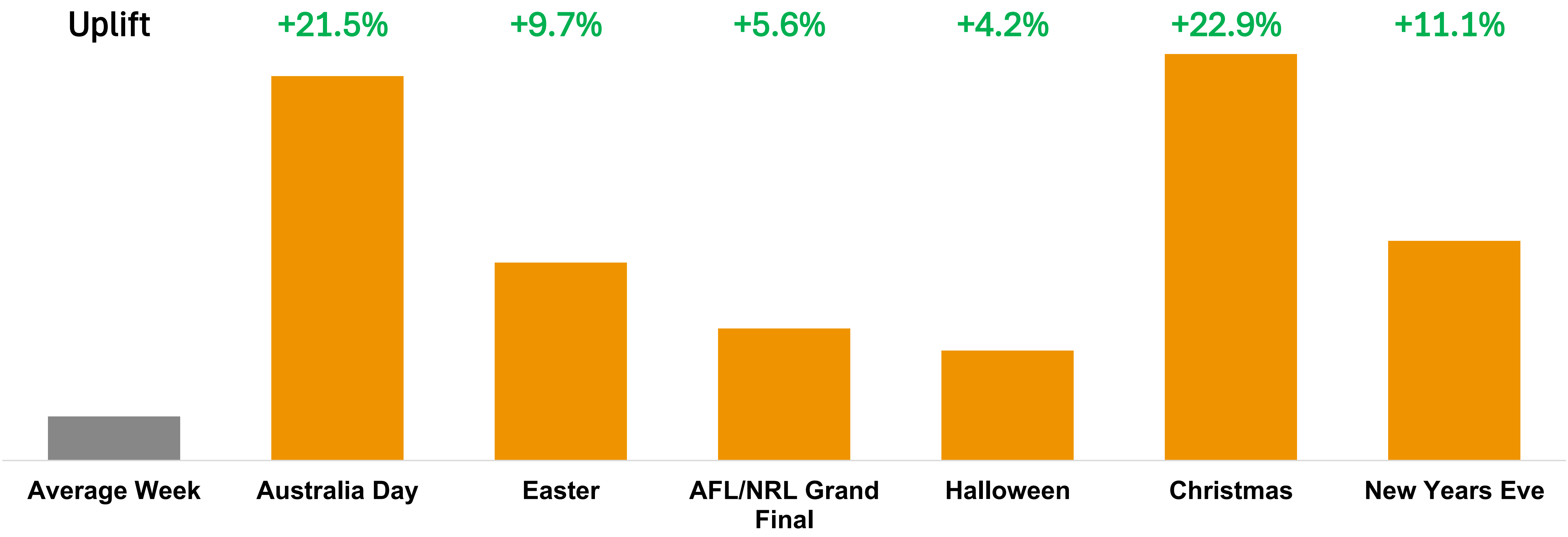
Capitalising on the momentum of Key Selling Weeks is vital, particularly given the over-index these periods have with the social occasions driving growth within the licenced channel

<u>NARTD Sales in Away From Home by Key Selling Periods</u>



Source: CCEP Commercial Insights; AFH KSW Tool – Event Weeks benchmarked vs average non-event week in 2025

Industry Opportunities

Local & Cultural Events

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The is also an opportunity to bolster your key event calendar with local and cultural events depending on the geography and ethnic make-up of the surrounding area

Local & Cultural Events

20 Jan	Aus Open Perth Festival
27 Jan	Lunar New Year
30 Jan	Adelaide Fringe Ramadan
9 Feb	Grand Prix
16 Mar	Syd Easter Show Gather Round
27 April	Magic Round Vivid Syd
11 May	State of Origin 1 State of Origin 2
22 Jun	State of Origin 3
6 Jul	Perth Super 440
20 Jul	City to Surf Adelaide Show Brisbane Ekka
7 Sept	AFL Grand Final NRL Grand Final
14 Sep	Bathurst 500 Perth Show
28 Sept	Gold Coast 500
19 Oct	Diwali
9 Nov	Adelaide 500

Localise the moment

- Sydney Lunar Festival
- Melbourne LNY Festival
- Brisbane LNY Festival
- Box Hill LNY festival
- Cabramatta LNY Festival
- Chatswood LNY Celebrations
- Sunnybank LNY
- Burwood Lunar Festival
- Springvale LNY
- Hurstville LNY
- Footscray Lunar Events

- Lakemba Night Markets
- Ramadan Night Market Dandenong
- Most Blessed Nights Liverpool
- Ramadan Street Festival Auburn
- Ramadan nights markets Blair Athol
- Ramadan Night Markets Durak
- Ramadan Nights Burswood Park
- Ramadan eat street Durack
- Al-Taqwa Ramadan Market

- Victorian Festival of Diwali
- Diwali & little India Harris Park
- Diwali Mela Perth
- Diwali Festival of lights king George square
- Diwali celebration darling harbour
- Diwali City celebration Adelaide
- Diwali Mela/lantern festival Canberra
- Parramatta Diwali festival of lights
- Wentworthville Diwali Street festival

Industry Opportunities

Weekly Events

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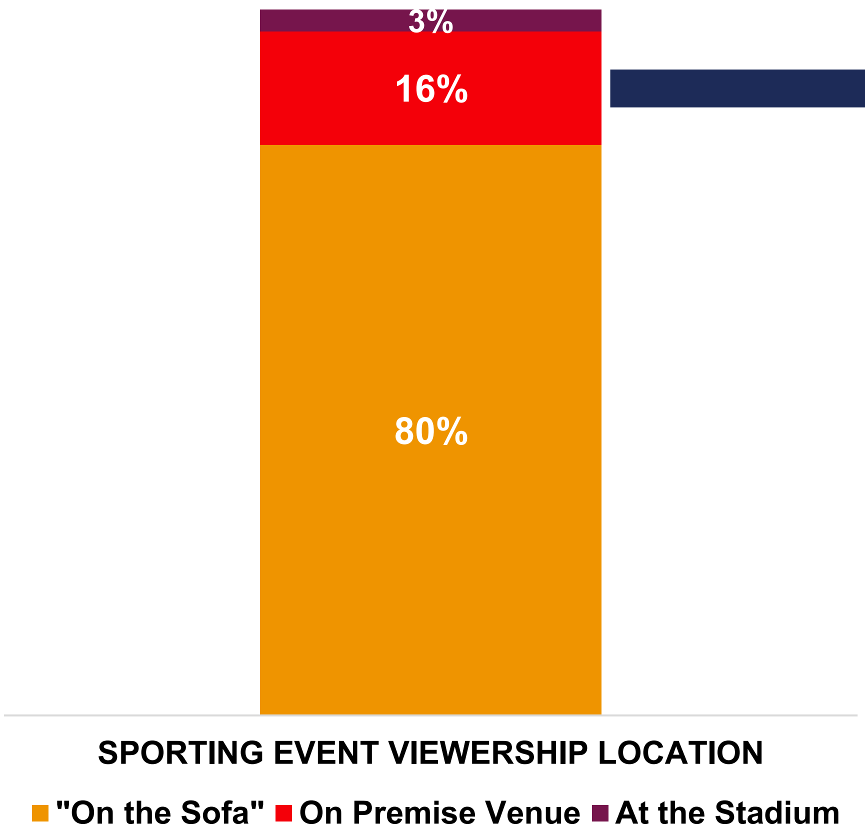
Whilst most Australians watch their weekly sport at home, ~16% will watch from a venue; During a regular game of NRL we see a 6.7% uplift in NARTD sales up to 17.2% for a marquee fixture

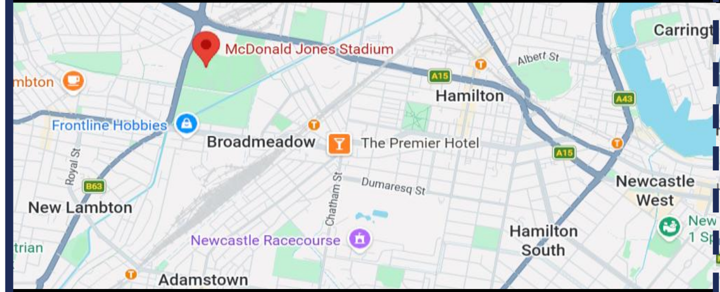
Mix of where Australian Televised Sport is watched (%)



Regular NRL Fixture

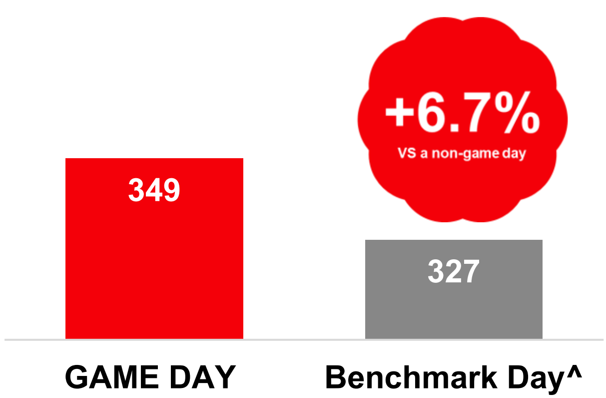
(Knights vs Rabbitohs: 3rd of May)

McDonald Jones Stadium - Newcastle



*Only stores within 5km radius considered

Avg Drink Transactions at Local Stores*



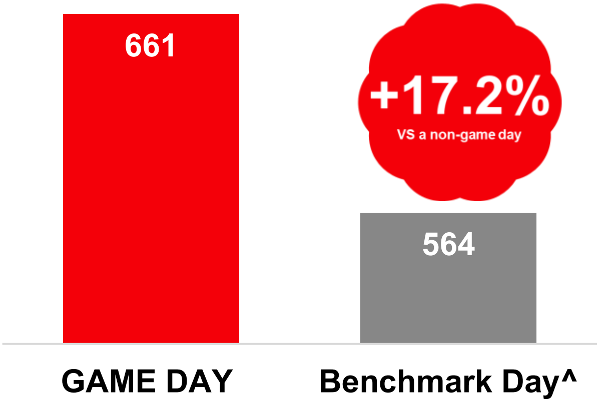
Marquee NRL Fixture

(Eels vs Tigers: Easter Monday)

Commbank Stadium - Parramatta

*Only stores within 5km radius considered

Avg Drink Transactions at Local Stores*



Source: CCEP Commercial Insights; Store Level Post-Code NARTD Transactions (only stores within 5km radius of stadium considered) Game-Day vs Benchmark Day

Industry Opportunities

Key Selling Week – Case Study

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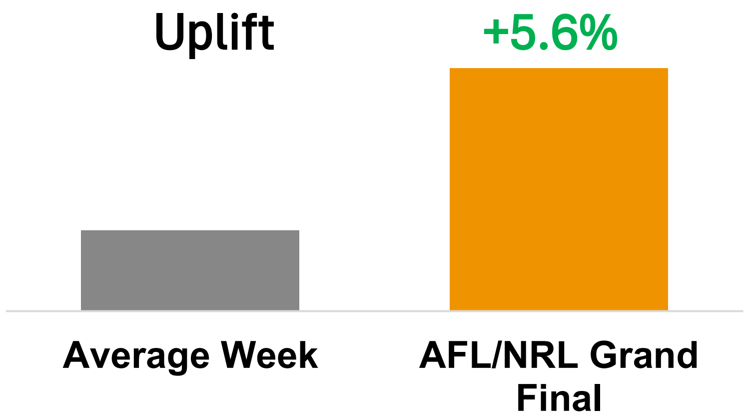
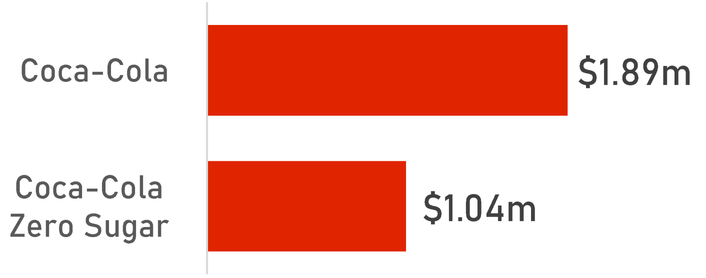
Insight

NARTD Sales Uplift during Footy Finals

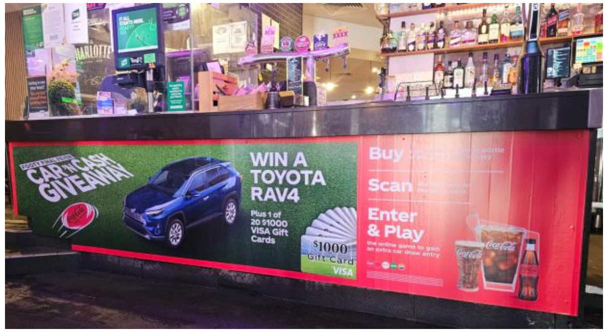




Footy Finals is a Key Event for Drinks sales in the Away From Home consumption channel with a 5.6% uplift vs a regular trading week; Coca-Cola and Coca-Cola Zero Sugar are the two largest selling brands throughout this period.

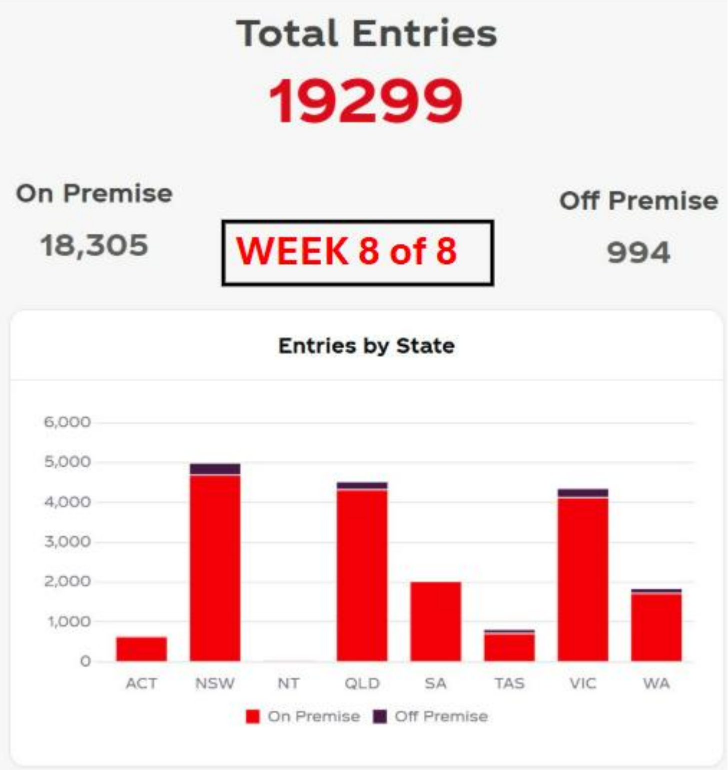
Action

We executed a consumer promotion across both on-premise and off-premise licensed venues with disruptive POS to drive engagement



Results

The high-appeal major prize supported by a simple QR-code entry mechanic drove successful participation across the licensed channel, predominately in on-premise venues



94%
On-Premise Entries

+4%
Net Sales Rev Uplift

The campaign was successful in accelerating growth (+4%) by capitalizing on the momentum of the existing key selling period

PUB LEADERS
SUMMIT 2026

To ask the right question is already half the solution

Carl Jung

Coca-Cola
EUROPACIFIC
PARTNERS