



# PACKAGED WATER

## PLANTBOTTLE® ACTIVATION

August 2013

# PlantBottle™ Toolkit

**PlantBottle** is a vital initiative to advance our KO Water Brand ambition.

It is the first ever recyclable PET plastic bottle made partially from plants. In launched markets, PlantBottle has driven sales, brand preference, and customer engagement. All while making a real social impact by reducing environmental footprint and empowering people to make better sustainable choices.

This document provides essential information & guidance to successfully launch Plantbottle if your market.





overview

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# 1. Strategic Overview





strategic overview

## Enabling prosperity through action

We believe that water is a fundamental enabler of individual & societal progress. But it's what we *do*, and the genuine, meaningful *actions* we take around water that can make a difference for society.

“Water is an essential component of growth, social and economic development, poverty reduction and equity...”.

(3<sup>rd</sup> UN Water report – 2009)





strategic overview

# Creating Shared Value with Our Brands

By enabling personal & social growth our Water Brand help drive a virtuous cycle -- where our Brand actions create real social impact, and this in turn enhances our Brand differentiation & competitiveness.

We call this creating 'Shared Value'. And this is the strategy for KO Water.







strategic overview

## Breakthrough differentiation is hard to find

Advancing the Shared Value strategy only happens when our Brand creates truly different consumer experiences. Presently, the water category is a sea of sameness. Most brands focus on cost-of-entry attributes of hydration, naturalness, or purity. Sustainability programs are generally easily replicated, focusing on plastic reduction.







strategic overview

## PlantBottle™ is breakthrough innovation

PlantBottle is real differentiation. It is the first ever recyclable PET plastic beverage bottle made partially from plants.

PlantBottle packaging looks, functions and recycles just like traditional PET plastic, but does so with a lighter footprint on the planet and its scarce resources.

TCCC has committed that all PET will be first generation PlantBottle by 2020 because it:

1. Is a proven brand building asset
2. Drives Corporate leadership
3. Hedges against oil pricing



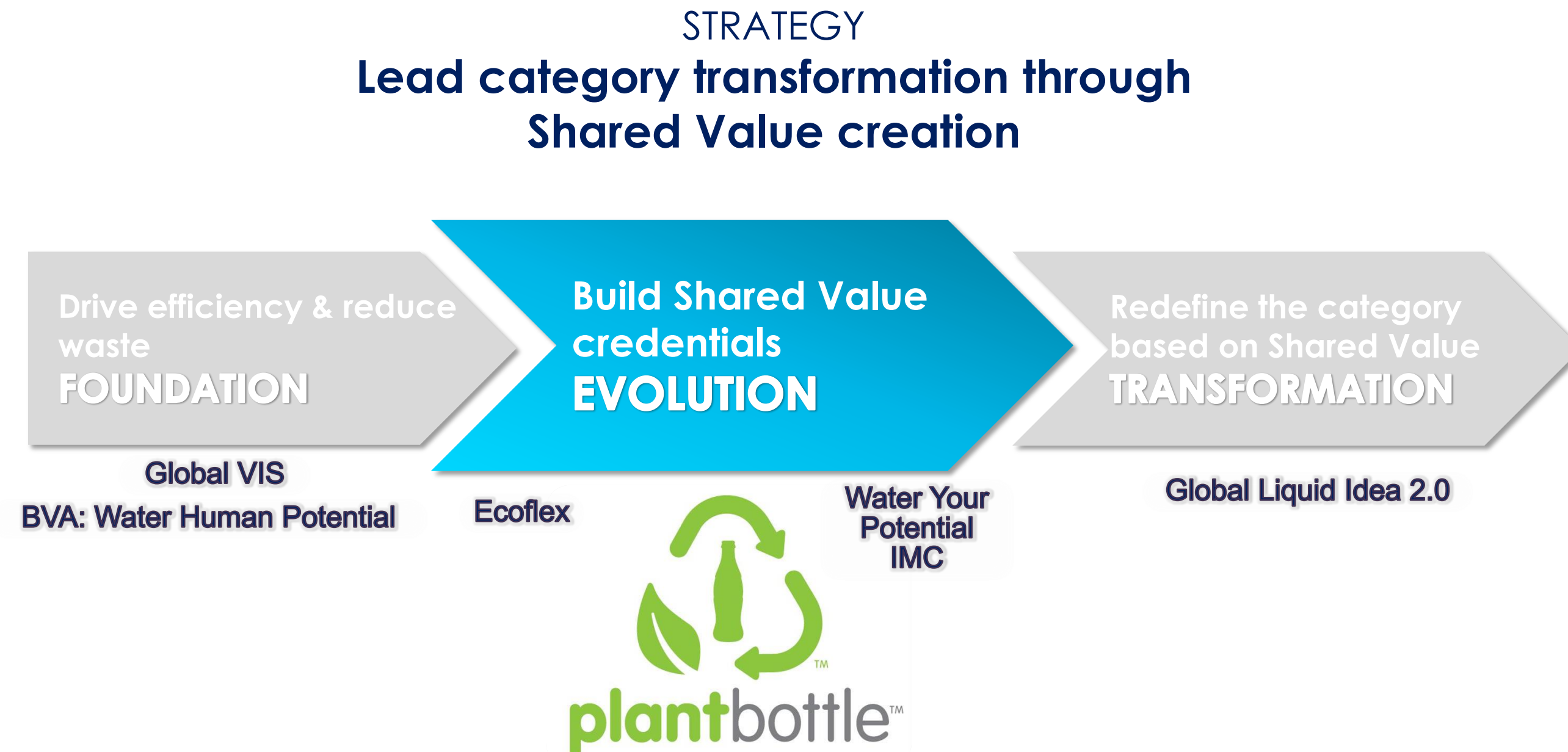




strategic overview

# PlantBottle™ is a powerful initiative to create Shared Value

On our roadmap to Water leadership, PlantBottle is a pivotal proof point to building Shared Value credentials, and creating meaningful differentiation in the category.





strategic overview

# Accelerating PlantBottle expansion to drive leadership

Since 2009 PlantBottle has been launched across 12 markets in water, helping advance our brands with meaningful differentiation versus competition.

- 2009 – US & Canada Dasani
- 2010 – Japan iLOHAS
- 2010 – Sweden & Norway Bonaqua
- 2011 – South Africa Valpre
- 2011 – Germany ViO
- 2012 – Serbia Rosa
- 2012 – Mexico Ciel
- 2012 – Brazil Crystal
- 2012 – Hong Kong & Taiwan Bonaqua
- 2012 – US & Canada smartwater
- 2013 – Trinidad & Tobago Dasani
- 2013 – Finland Bonaqua





## 2. Plantbottle™ Proven Success Stories





proven success stories

## USA: PlantBottle revives Dasani

# DASANI (US)

## Pre-PlantBottle Background

- In 2009, consumers were leaving bottled water category due to negative perceptions of packaging's impact on the environment
- DASANI was losing volume share due to lack of differentiation in marketplace & competitive pricing
- DASANI experienced delisting in major retail chains

## Strategy

Reposition brand by leading in packaging sustainability

- **Point of Differentiation:** PlantBottle as unique, ownable proof point to connect with consumers desire for a smarter bottle
- **Showcase brand leadership:** Natural packaging cues to reinforce positive product qualities & strengthen premium positioning
- **Increase authorizations:** PlantBottle as vehicle to meet customer demand for reduced carbon impact

2009



2012





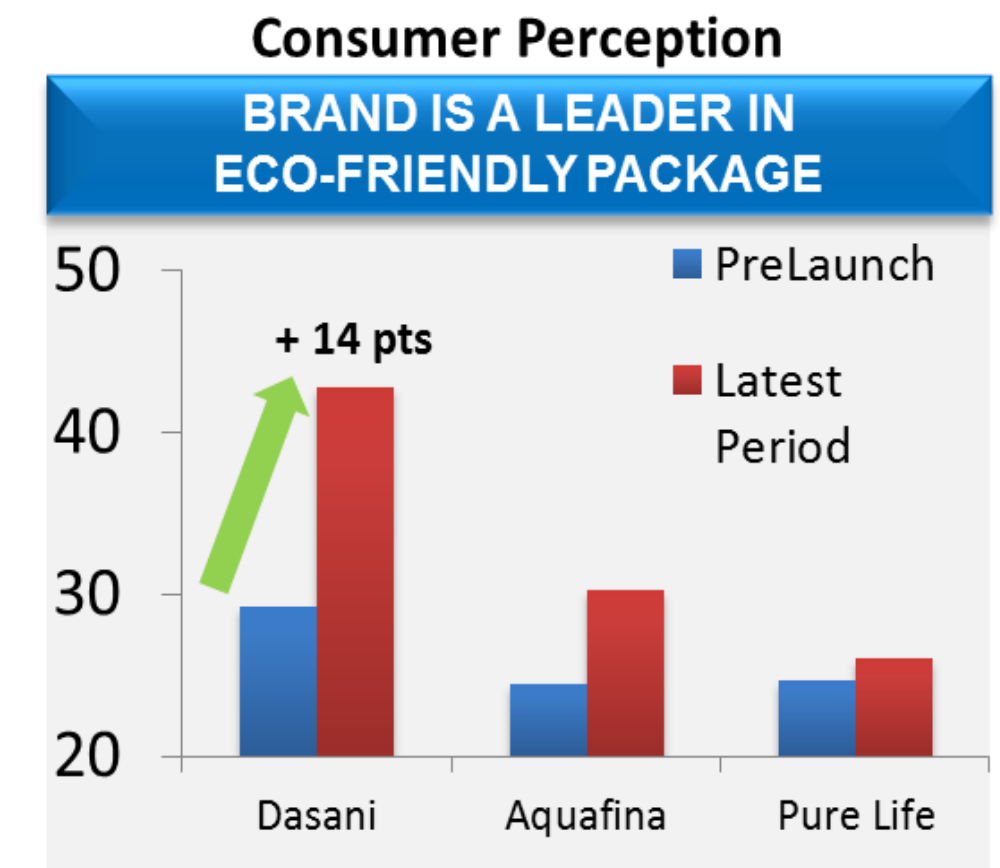
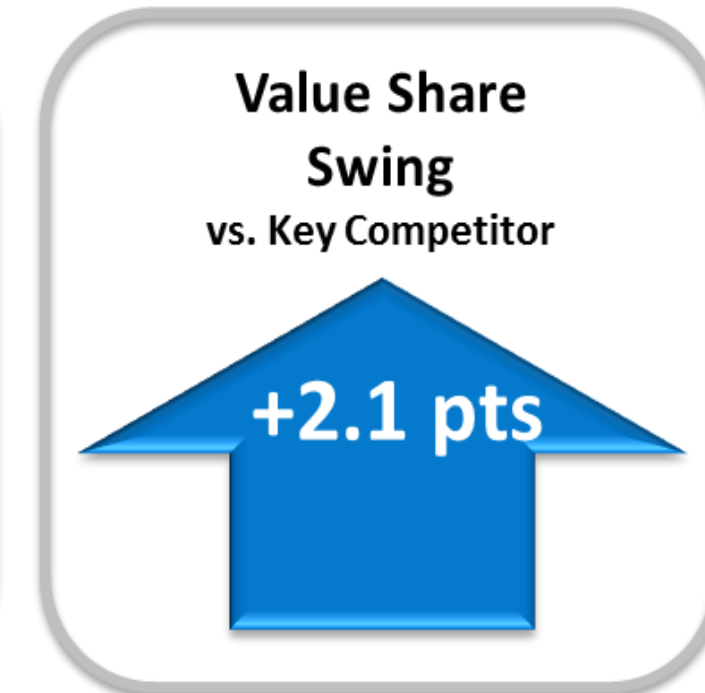
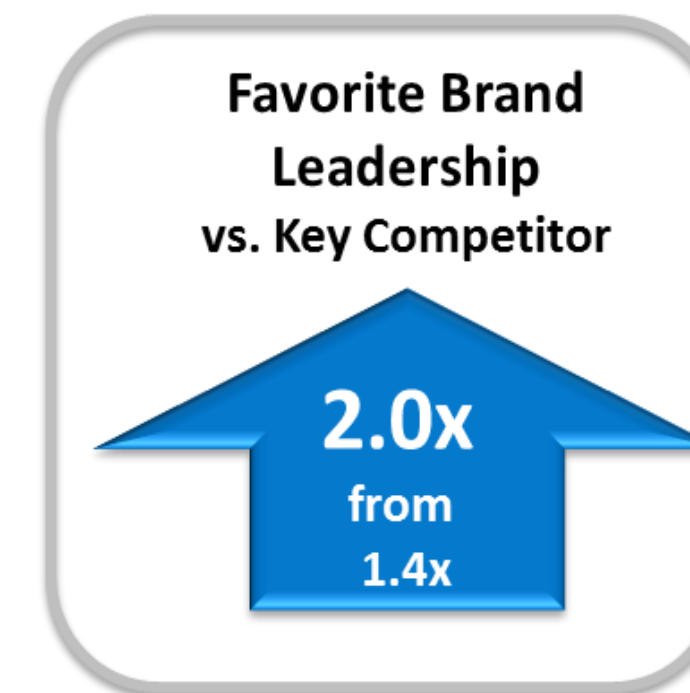
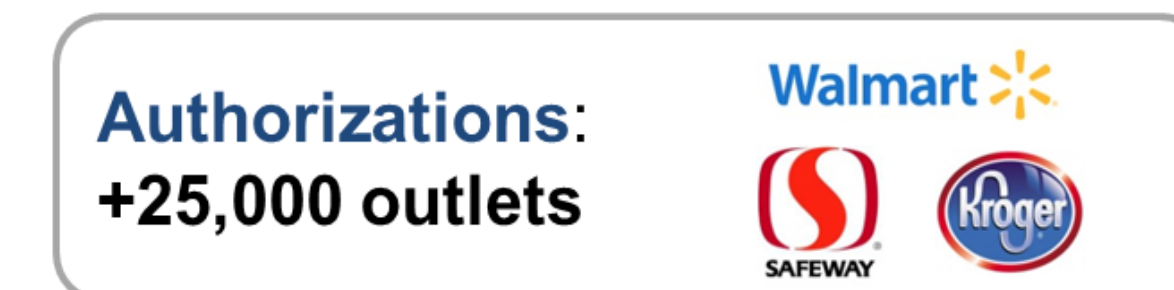
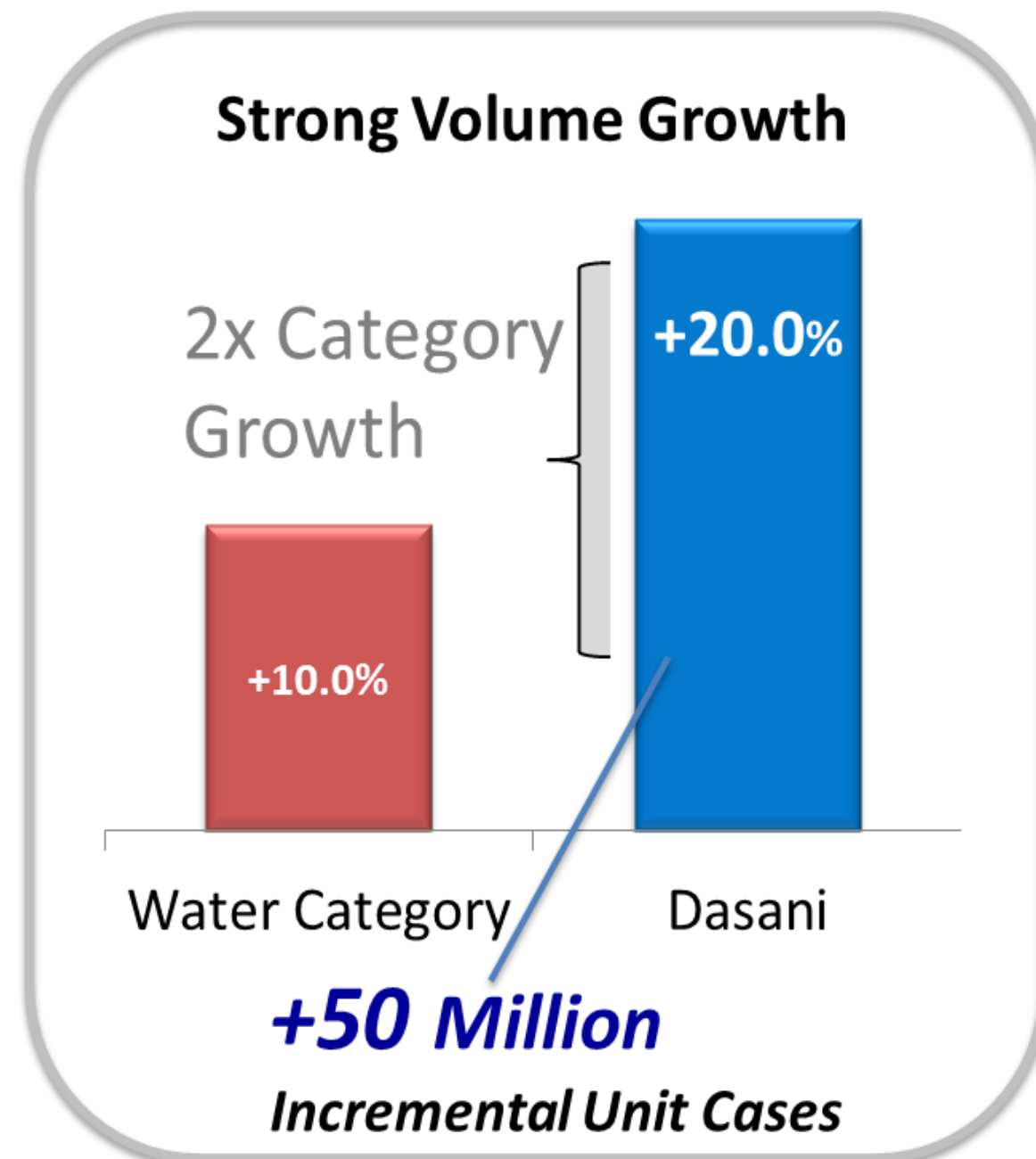


proven success stories

# USA: PB drives volume, value, brand health & authorization lift

## Results

- Dasani seen as 'leader in eco-friendly packaging'
- Consumers recognize Dasani as their 'favorite brand' more since the PlantBottle campaign began, extending its lead over the competition
- Dasani saw its daily drinkers increase from 10MM to 12MM (+20%)
- Dasani is winning both value and volume share
  - Value share has increased 2.1pts vs. competition
  - Volume jumped 50MM incremental unit cases, outpacing category growth 2 to 1
- Dasani was reauthorized in over 25,000 outlets between 2010 and 2012, including Walmart & Safeway.





proven success stories

## Serbia: PlantBottle advancing Rosa

### Rosa (Serbia)

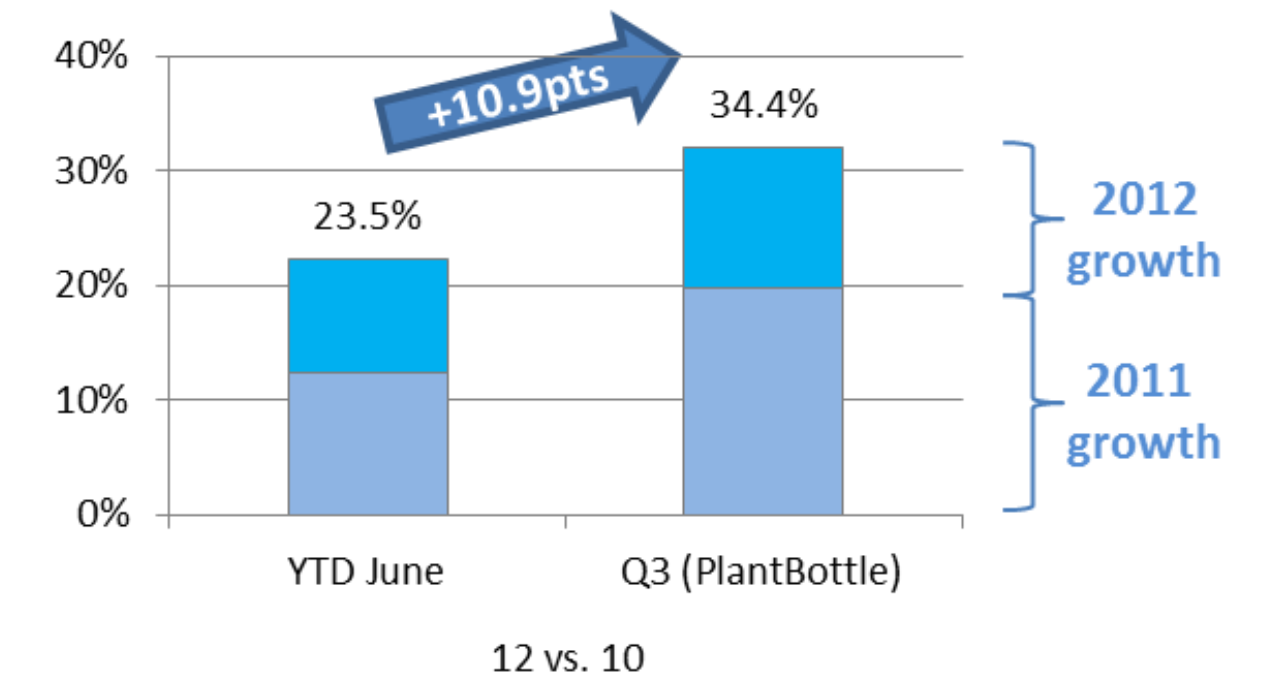
Serbia introduced PlantBottle to address shrinking category leadership and reboot brand that was perceived as “old and undifferentiated”

### Results

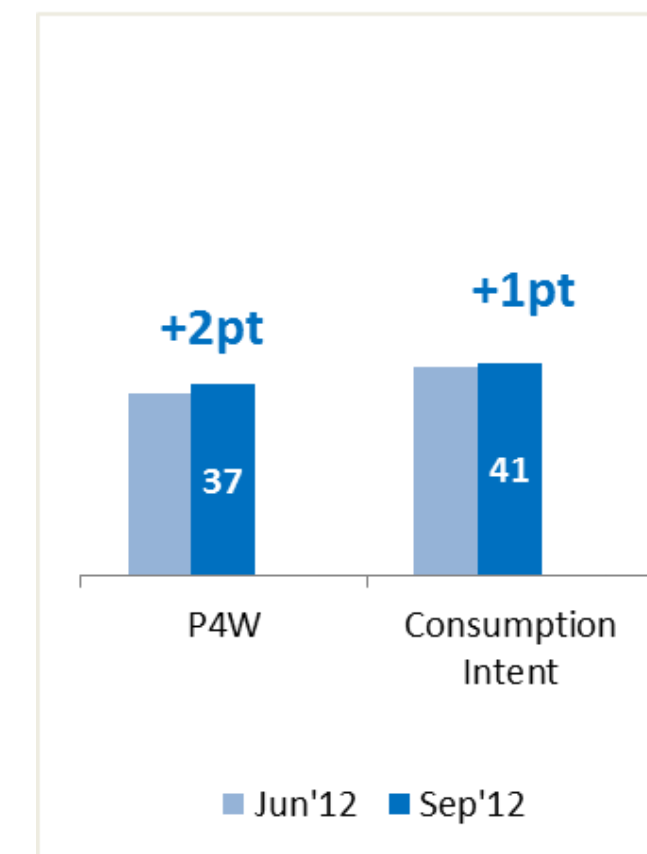
- Volume growth, back on double digit trend
- Rosa is clear #1 Still Water - YTD Sep12 27.1% (+2.6pts vs. LY, +5.8pts vs. 2LY)
- Rosa increases its gap with Aqua Viva, on all parameters
- Rosa became Favorite Packaged Water Brand
- Rosa is within Top 5 AFB brands in Brand Trust
- Rosa is #1 player in local AFB digital arena with FB page of 165.000 fans
- Rosa now is pure, healthy, persistent, composed, traditional, trustful, family oriented, yet at the same time up to dated, modern, dynamic and urban (Censydiam Jun12)



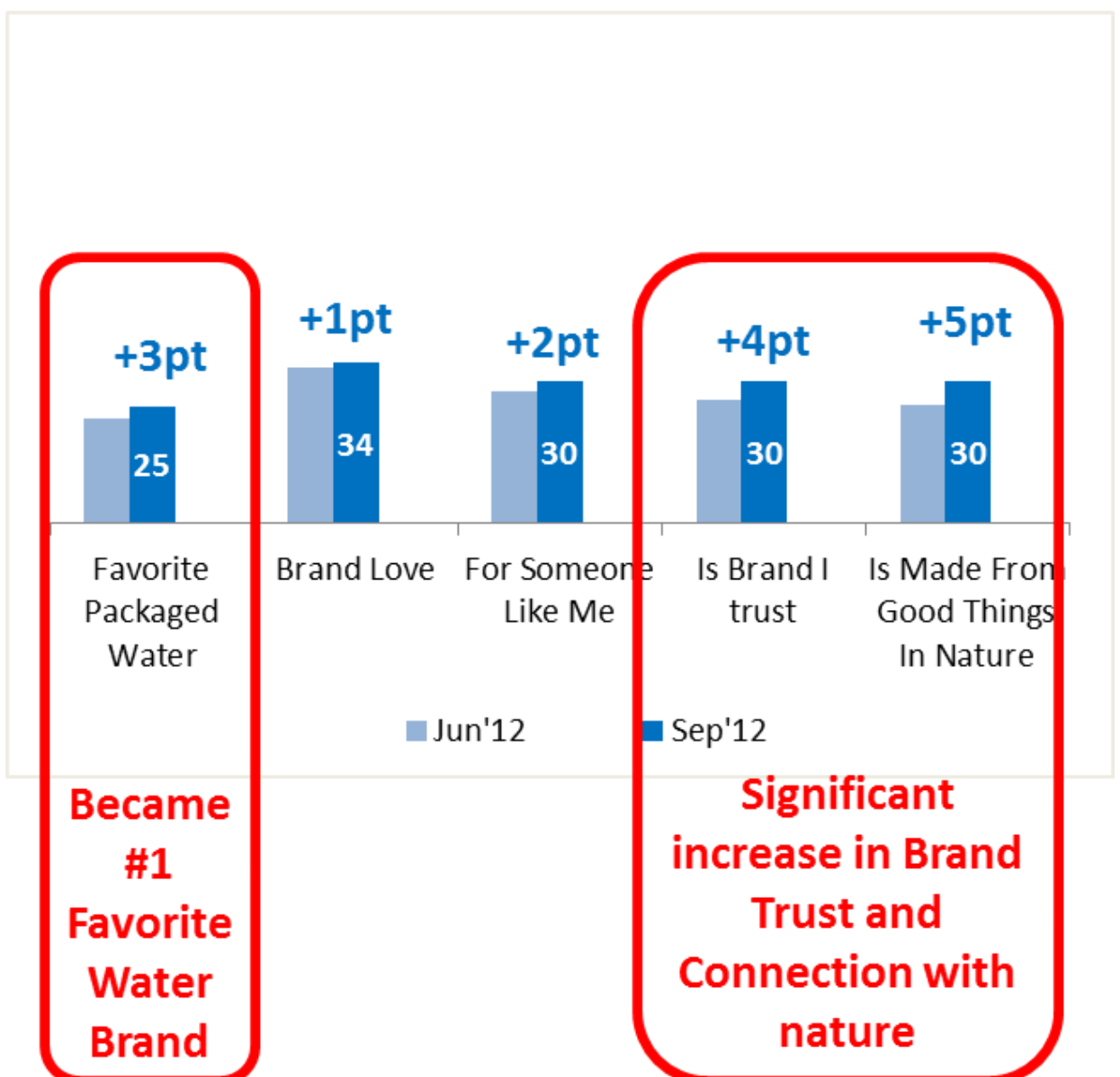
### Volume 2012 vs. 2010



### Usage



### Image







proven success stories

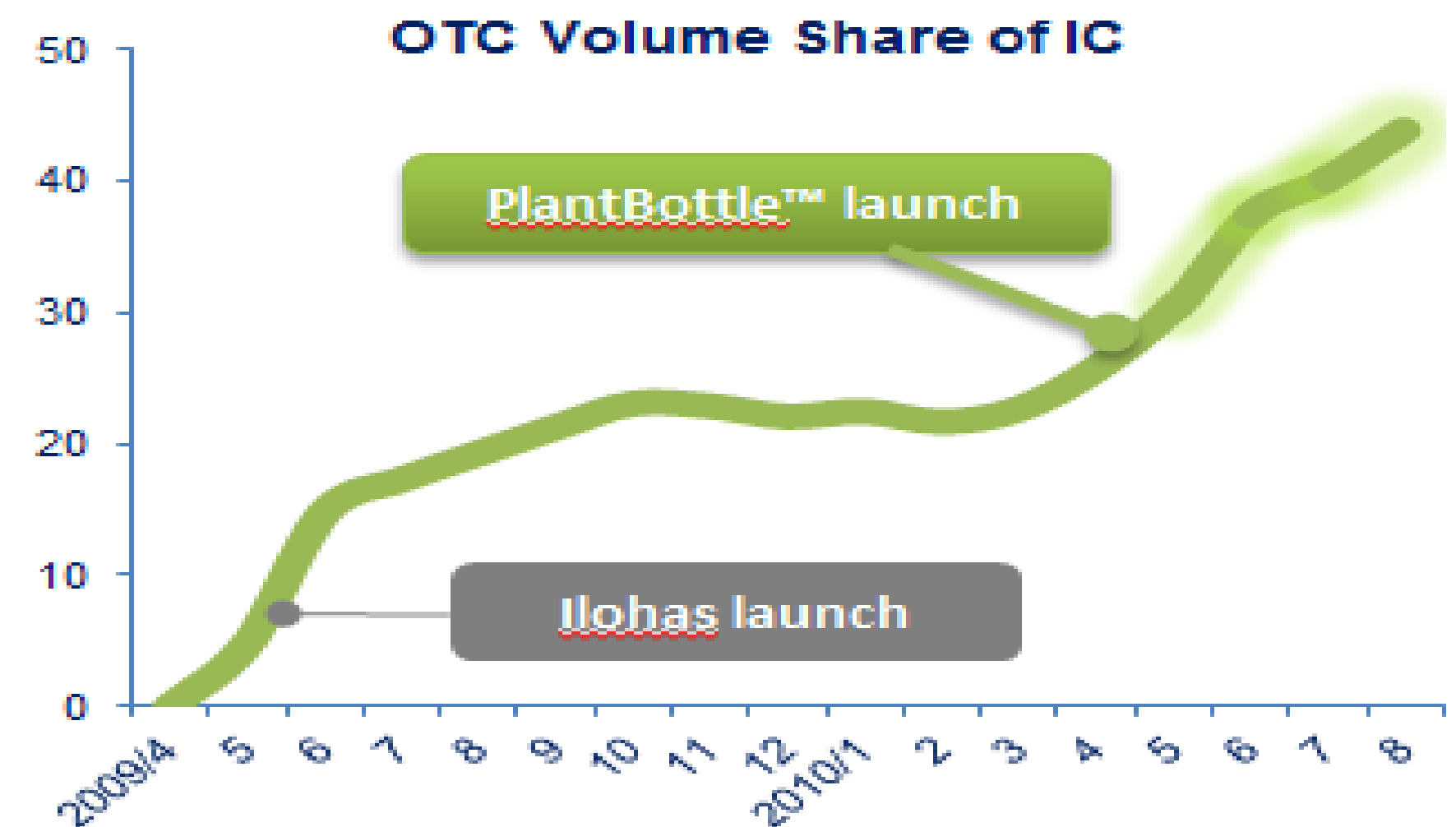
## Japan: PlantBottle fortifies the ILOHAS proposition

### ILOHAS (Japan)

Japan introduced PlantBottle in 2010 soon after its successful ILOHAS launch. PlantBottle further reinforced the differentiated sustainability positioning of the ILOHAS brand.

### Results

- Helped vault ILOHAS volume share +4.7pts
- Strengthened ILOHAS differentiated positioning around sustainability
- Further built share and sustainability leadership in all categories





# 3. Technical Guidance



technical guidance

## What is PlantBottle?

# PlantBottle is PET as you know it.

The innovative breakthrough is that it is partly made from plants as opposed to oil.

- + Fully recyclable
- + Cost competitive to oil-based PET
- + Commercially viable today

PlantBottle is the only bottle that is Functional  
+ Recyclable + Renewable







technical guidance

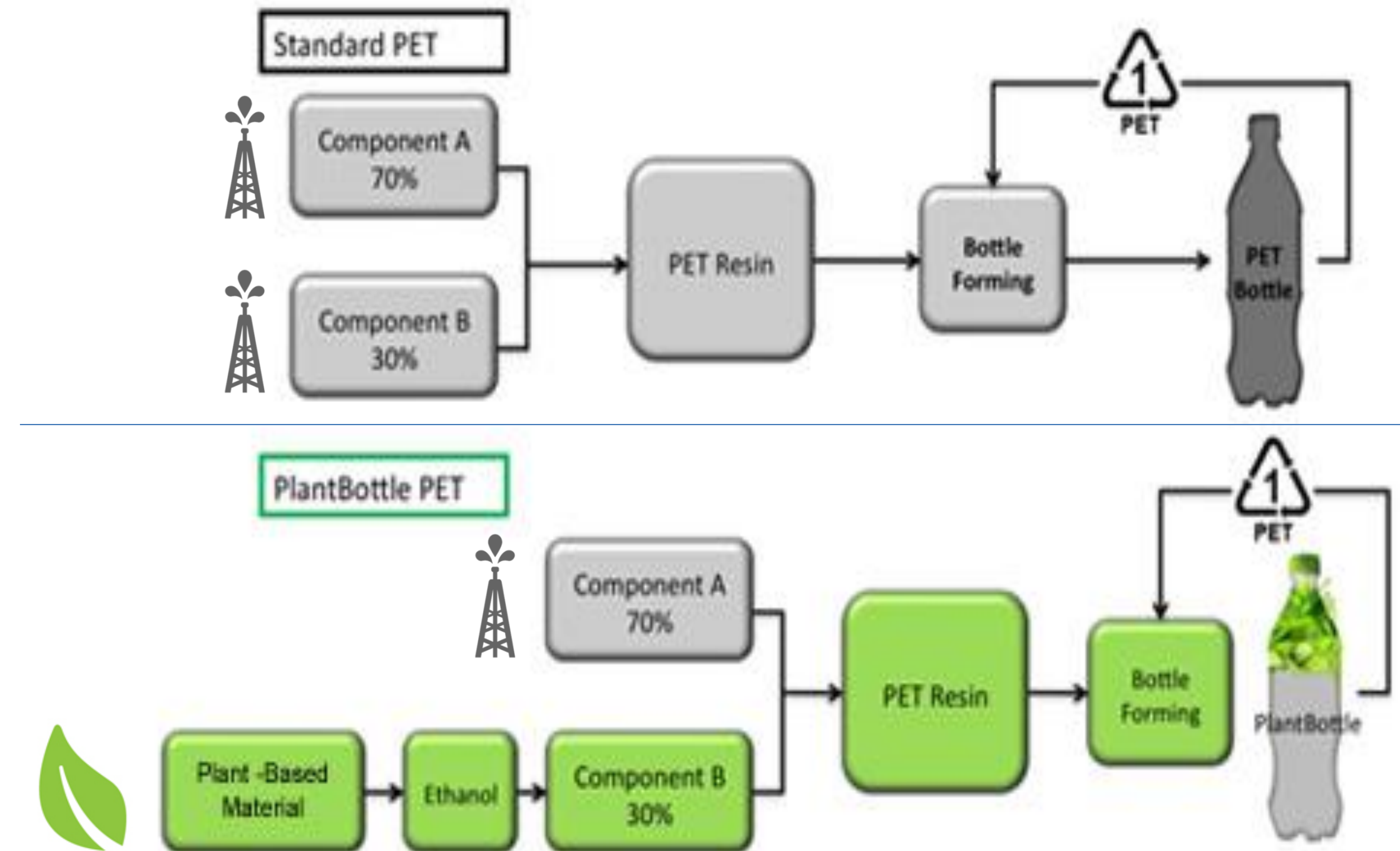
## Resin Supply

# PlantBottle resin is PET resin.

The only difference is that the MEG is sourced from plants as opposed to oil. MEG is 30% of PET by weight.

The only implications for production are:

- Small additional capital costs making sure PB resin is in different silo than traditional resin.
- Line test only necessary if PB resin supplier is new supplier





technical guidance

## Resin Cost

Global procurement targets for PlantBottle™ have been met or beat every year since introduction:

- 2010 Target: 15-20% (14.5% Achieved)
- 2011 Target: 10-15% (6.5% Achieved)
- 2012 Target: 10-15% (14% Achieved)

Market conditions look very favorable for PlantBottle program over next couple years with traditional MEG prices increasing

Global average on-cost for PlantBottle expected to drop to 7% in 2013.

Water packaging requires less resin than other categories. Oncost for PlantBottle is below TCCC average of \$0.03 to \$0.04 per unit case.

Country	Demand (MTs)	On-Cost (%)
North America*	65,418↓	6.1%
Mexico	14,188↑	6.4%
Brazil	12,745↑	13.9%
Argentina*	5,400↑	5.3%
Chile	4,000↑	3.9%
GB	9,500↑	8.1%
Germany*	1,350↓	9.5%
BENELUX	4,720↓	8.1%
Nordics	3,560↑	8.1%
South Africa	1,890↓	6.2%
Japan*	9,093↓	6.3%
Australia	1,160↓	9.7%
Other	25,776↑	7.0%
<b>Total</b>	<b>158,800↑</b>	<b>7.0%</b>

\* Well positioned supply markets





technical guidance

# Gaining Franchise Launch Commitment

PlantBottle currently has a small resin upcharge due to unoptimized supply chain. Long term, PlantBottle resin will be at parity or better than traditional oil-based resin.

Be creative about offsetting the upcharge in short term. Pair with savings like:

- Supply chain optimization (Dasani)
- Ecoflex lightweighting (iLOHAS, Ciel)
- Tax and regulatory breaks (Bonaqua)
- Retailer stocking fee breaks (Vio)

As the up charge is likely to be short-term, it's important to present PlantBottle within the broader Brand strategic framework and innovation pipeline.







technical guidance

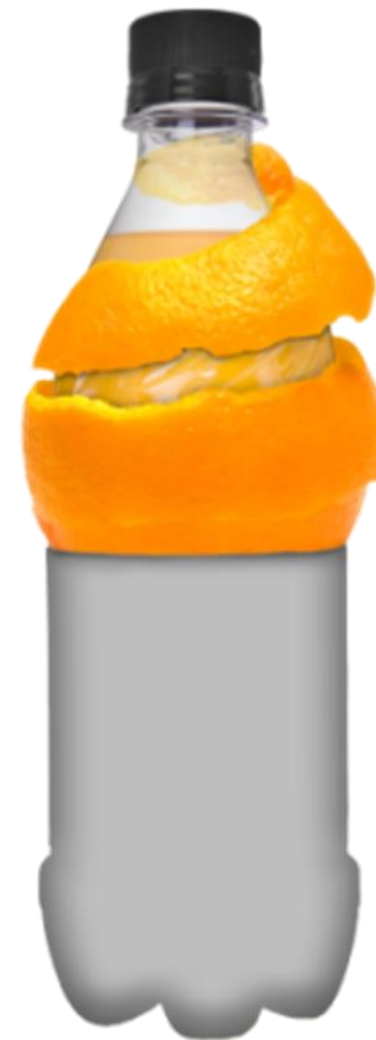
## Next Generation of Resin

The current generation of PlantBottle is just the beginning of the pipeline. Total decoupling from oil on a commercial scale is achievable within the decade:



### PlantBottle 1.0

- Commercial viable today
- 30% plant-based
- Sourced from industrial grown sugarcane



### Biomass

- Produced today, commercial viable in 2014
- 30% plant-based
- Sourced from plant waste, like corn or rice husks



### PlantBottle 2.0

- Produced today, commercial viable by 2017
- 100% plant-based
- Sourced from a wide variety of plant waste

## 4. PlantBottle™ Activation





# Activation Recommendations

PlantBottle has proven to drive value, volume, brand health and authorizations when executed properly.

Key activation steps include:

- Integrate PlantBottle into brand story
- OWNED: Be bold on pack
- EARNED: Engage key stakeholders including local NGOs and media
- SHARED: Partner with customers, they see value in proposition
- PAID: Devote DME and message appropriately
- Educate the System





PlantBottle™ activation

## Integrate into the Brand story – e.g. Water Human Potential

Critical to a successful activation is using PlantBottle to advance the overall Brand strategy.

The global Brand vision is Water Human Potential. This means that we help people recognize & realize their untapped potential.

PlantBottle can be activated in a variety of ways to help advance the Brand story. It is important to understand the category realities and Brand context and integrate the PlantBottle story accordingly.

THERE IS HUGE POTENTIAL HIDDEN IN EVERYONE OF US.  
KO WATER HELPS YOU SEE IT AND REALIZE IT.

Cultural Role  
WORLD

Through PlantBottle™ KO  
Water is driving positive  
transformation in the world

KO Water enables  
cultural vitality - be  
an agent of positive  
transformation

Brand Role  
WE

PlantBottle™ helps  
me realize that I  
can make a  
difference

KO Water  
enables  
emotional  
vitality –  
realize my  
potential

Product Role  
ME

Perceptions of Plant material  
reinforces belief of natural or  
purity intrinsics

KO Water  
enables  
physical  
vitality -  
rehydrated

## Fully integrate PlantBottle into the Brand story

Even within category, different intrinsics of PlantBottle can be used to complement unique brand messages

PlantBottle as proof point of sustainability positioning

- Combined with eco-flex lightweighting & sustainable sourcing
- Green closure & logo



Smart packaging to reinforce 'designed to make a difference' positioning

- Plants emphasize purity of product
- Leaf prominently placed on label & secondary packaging
- Green closure & logo



PlantBottle technology to reinforce innovative design of product

- Golfish on interior label playfully talks about PB as innovation
- No green closure nor logo nor leaf



Environment

Innovation





PlantBottle™ activation

## OWNED: Be bold on pack to build awareness

Utilize primary and secondary packaging to boldly communicate PlantBottle and cut through in-store and on-shelf.

- Leaves and green closure reflect environment, but also reinforce product values like purity and natural goodness.
- Clean design approach reinforces crispness of taste and premium positioning







PlantBottle™ activation

## EARNED: Buzzworthy innovation

### Influencer outreach

PlantBottle is real innovation that draws interest from journalists, bloggers, NGOs, and other stakeholders. When done well, EARNED media can play a central part in launching PlantBottle.

Best practices to Earn media are:

- Leverage global relationship with WWF
- Showcase industry awards
- Find local NGO partnerships (examples include....)
- Partner with like-minded brands
- For further PAC guidance, please refer to the Global PAC toolkit found at...

#### Life Cycle Performance



#### Responsible Sourcing







PlantBottle™ activation

## SHARED: Partner with customers on sustainability goals

### PlantBottle Drives Customer Value

PlantBottle can drive a greater share of in-store support. Customers see the benefit of PlantBottle long before consumers, as it meets customer's sustainability goals (e.g. carbon offsetting). PlantBottle can be leveraged to reclaim and win new authorizations.

#### US Example:

- Walmart relisted Dasani because of PlantBottle and now demands more brands to convert to PlantBottle, like Simply and Gold Peak
- PlantBottle has cemented annual in-store promotions for brand, example: Dasani Earth Month
- PlantBottle was the reason for new FSOP partnerships like Starwood, Disney & Sea World theme parks



*Incremental Displays in Garden Centers*



*Premier Sponsor of Target's Earth Month*







PlantBottle™ activation

## PAID: Clear & simple communications

- Fun and inspiring communications work for consumers. Overly technical communications or large environmental claims do not resonate.
- Additional DME investment is recommended for launch – particularly given the payback



**WHY CHANGE WHAT NATURE HAS PERFECTED?**  
We're contained within a plant. It's the most natural thing in the world. That's why we've introduced the PlantBottle from Valpre - a PET bottle that's a bit different, made from up to 30% plant material. It's inspired by nature for a better tomorrow.



- Promote 100% recyclability. This material was designed to be used over and over again. That is what makes it different than other bio-based plastics. And it helps avoid potential confusion that PlantBottle is biodegradable.







## PlantBottle™ activation System Engagement

PlantBottle™ is significant innovation for which we can all be ambassadors. Create more ambassadors within the System by educating and motivating employees through on-site promotions & MyKO outreach

- Every Bottle Has a Story Videos
- Packaging impact and milestone exhibits
- Partnership Exhibits
- Hero articles on Journey homepage





## 5. Accessing Materials, Rights & Usage





accessing materials & usage rights

# Logo Guidelines

## Logo lock up

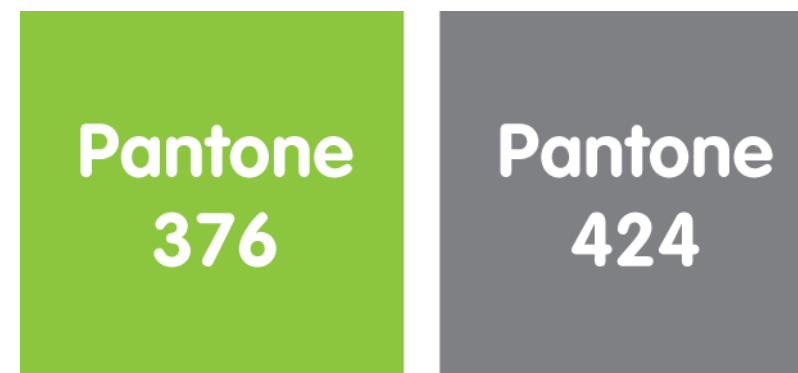
- Logo has 3 elements – chasing arrows, leaf and contour bottle
- Name must always accompany logo – **plantbottle** is 1 word, 2 fonts & colors, on one line always
- Qualifier must be used – ‘up to 30% made from plants, 100% recyclable plastic bottle’.

## Color

Green & Grey are recommended. Exceptions allowed for brand specific colors if requested through project team.

## Translations

- Use ‘plantbottle’ in English. Exceptions allowed in markets that have different alphabets. Translated name must be submitted for trademark by local legal counsel.
- Qualifier must always be translated into local language.



## typography

### VAG Rounded Bold

ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
1234567890

### Gotham Rounded Bold

ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
1234567890

### Gotham Rounded Medium

ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
1234567890

### Gotham Rounded Book

ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
1234567890

**PlantBottle logo is a registered trademark globally.** Prior to use, all trademarks and copy must be approved by the local legal counsel for your market.





accessing materials & usage rights

## TVV, Print & POS Materials

Global rights are currently NOT owned for any past PlantBottle™ work. For your reference, here are examples of water brand creative.

For rights information please contact The Global Rights Management team at McCann Erickson:

Janet Reagan [Janet.Regan@mccann.com](mailto:Janet.Regan@mccann.com)

Higgins Heather [Heather.Higgins@mccann.com](mailto:Heather.Higgins@mccann.com)

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## 6. Contact

For further information please contact:

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