The Director's Atlas

Sector Outlook



Market size and valuation

- ~US$35-55 bn, 2025E
- Non-alcoholic beverage retail sales
- Range reflects differing market scopes

Primary economic engine

Affordable Rs10/Rs20 packs, kirana and rural distribution, quick-commerce impulse demand and regional fruit or electrolyte drinks.

Boardroom Focus

01 Scale quick-commerce with profitable pack economics

02 Strengthen local bottling, R&D and ingredient supply

03 Build heat-resilient distribution and circular packaging

For Business, Finance and Function Directors:
A starting point for roundtable conversations on growth, resilience and stakeholder alignment.

Transformations Our Programs Deliver

OUR COACH

For Business, Finance and Function Directors

Two outcomes	Foresight to lead through disruption. Influence to align stakeholders before action. Camera confidence, eloquence, vocal gravitas and a six-week peer network.

01 ENTERPRISE RESILIENCE

Foresight → Recognised Strategic Leadership

INSIDE YOUR COMPANY

Be recognised as the director who identifies structural shifts early and turns them into a clear agenda for investment and action.

OUTSIDE YOUR COMPANY

Build a reputation for judgement that clients seek by name, partners trust and competitors benchmark against.

02 STAKEHOLDER ALIGNMENT

Functional Authority → Enterprise-wide Influence

INSIDE YOUR COMPANY

Build a function backed by peers and the C-suite. Articulate ideas with clarity, eloquence and vocal gravitas, with confidence in the room and on camera.

OUTSIDE YOUR COMPANY

Be known for ethical influence and strategic judgement, supported by a trusted peer network built over six weeks.

Five paradigm shifts

What changes the basis of competition

01 Structural

Brand-led competition → price-point battles, bottler scale and quick-commerce.

02 Technology

Conventional bottling → recycled PET, smart coolers and live demand feeds.

03 Evidence and trust

Brand reputation → sell-through evidence, retailer returns and credible claims.

04 Economics

Volume growth → pack margins, channel fees and tax-sensitive portfolio choices.

05 Socio-cultural

Seasonal thirst → longer heat seasons, regional flavours and sugar awareness.

FOR YOUR NEXT LEADERSHIP DISCUSSION

Which of these shifts could change your competitive position - and which is missing from your leadership agenda?

Opportunity & Disruption

Where value can move in soft beverages

01 Market opportunity

Quick-commerce pack formats, local fruit-based drinks, regional voice ordering and affordable single serves.

02 Disruption

Sugar and concentrate cost swings, tax-category differences, extreme heat and packaging obligations.

03 Sector impact

Fixed price points constrain margins; delivery fees, chilling costs and recycled packaging add pressure.

04 Strategic response

Localise PET and can supply, create channel-specific packs and strengthen heat-resilient distribution.

Opportunity → Disruption → Impact → Strategic Response

Sector Movement

Signals to fund, reshape or leave behind

EVOLVE

Reshape existing lines

Quick-commerce logistics, domestic ready-to-drink tea and juice, direct-to-consumer brands and sugar substitutes.

SURGE

Scale emerging lines

Beverage fulfilment hubs, electrolyte drinks, regional value brands and alternative-sweetener processing.

SHRINK

Reduce exposure

Slow-delivery models, unhedged imported-input exposure and uncertified synthetic drink lines.

SUNSET

Exit structurally weak models

Non-recyclable packaging, inefficient manual bottling and sub-scale models unable to absorb cost pressure.

FOR YOUR NEXT LEADERSHIP DISCUSSION

What should your business fund, reshape or stop - and where does the leadership team disagree?

Governance Agenda

Regulatory and board priorities

01 Regulatory drivers

- FSSAI food safety, product standards and substantiated claims
- GST classification, Legal Metrology and plastic-waste obligations
- Data protection across consumer and distributor platforms

02 Board oversight priorities

- Scale quick-commerce while protecting channel profitability
- Secure domestic concentrate, bottling and packaging capacity
- Assure safe products, packaging compliance and data governance

Director's Future Role

Strategy, finance and operations

Strategy

Model Rs10/Rs20 pack margins, channel mix and regional-flavour portfolio choices.

Transformation

Digitise kirana ordering and distributor claims; redesign packs and cold chains.

Finance

Protect channel margins, hedge imported flavours and track yield per product.

Risk & Compliance

Assure food safety, tax classification, packaging compliance and heat contingencies.

Operations

Improve micro-fulfilment, bottling speed and domestic raw-material availability.

Supply Chain

Manage sugar and concentrate costs; localise packaging and protect cold chains.

FOR YOUR NEXT LEADERSHIP DISCUSSION

Are strategy, finance and operations working from the same assumptions about growth, investment and risk?

Director's Future Role

Commercial, customer and product

Quality & Excellence

Assure bottling yields, recycled-PET quality, food testing and fill accuracy.

Business Development

Win quick-commerce placement and expand regional brands across Tier 2/3 towns.

Sales

Expand kirana and rural coverage; negotiate dark-store listings and exclusive packs.

Marketing

Activate local flavours and delivery occasions with credible product claims.

Client Experience

Improve retailer service, product freshness, consumer helplines and complaint resolution.

Product & Technology

Connect delivery platforms and voice ordering; design regional drinks and pack formats.

Director's Future Role

Data, people and governance

Data & Analytics

Forecast demand by heat, festivals and channel; test pack-price sensitivity.

Information Security

Secure bottling systems, distributor apps and quick-commerce data integrations.

People & Culture

Recruit beverage chemists and logistics talent; equip retail teams for digital tools.

Learning & Development

Train sales teams in digital ordering and plant operators in food safety and recycled PET.

Legal

Protect flavour formulations; govern labels, platform contracts and personal data.

ESG & Sustainability

Improve packaging circularity, control additives and strengthen plant and fulfilment safety.

Turn Sector Intelligence into Enterprise Action

For Business, Finance and Function Directors

Which business priority needs clearer direction or stronger support?

EXPLORE ROUNDTABLE THEMES

01 Enterprise Resilience

Turn disruption into growth with a financially grounded resilience roadmap.

02 Enterprise Transformation

Convert strategy into execution, ownership and measurable change.

03 Stakeholder Alignment

Move from functional authority to enterprise-wide influence.

Let others see the capability those closest to you already recognise.

Grow in confidence, express yourself with eloquence, and become more recognised for the value you bring.

REQUEST AN INVITATION

Discuss your priority on WhatsApp

Bring one live business challenge. Let’s explore which roundtable is relevant to your priorities.

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