International Journal of Business Marketing and Management (IJBMM)
Volume 5 Issue 7 July 2020, P.P. 01-08
ISSN: 2456-4559
www.ijbmm.com

Coca-Cola Franchising Business Model: The Case of Mutare Bottling Company in Zimbabwe

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Abstract: *Mutare Bottling Company (MBC) is one of Coca-Cola franchise businesses in Zimbabwe. However, MBC focuses on the Manicaland province where it provides Coca-Cola five brands namely: Coca-Cola, Fanta, Pine nut, Sparletta and Sprite which are all in 300 milliliters and 1litre bottles. Its competitors in the province include Pepsi, Schweppes, Dairibord and Dendairy as well as illegal imports of Coca-Cola brands from neighbouring Mozambique. In order to counter growing competition MBC has introduced a number of strategies such as a new plant that will ramp up its production capacity. It has also increased its fleet of delivery trucks and vending units. Environmental sustainability has also become one of its key priorities. Moreover, MBC has addressed shortages in local supplies of raw materials, imported ingredients and packaging materials.*

Key words: *Mutare Bottling Company, Coca-Cola, franchise, market demand, sustainability*

I. Introduction

Daszkowski (2017) motivates that the Coca-Cola franchise business goes as far back as 1899 such that by 2015 it had grown to 275 independent companies globally. Its success is largely attributed to its market positioning strategy of integrating product and service standardization with localization. Wilkins, Butt, Shams and Perez (2019: 211) explain that standardization is the uniform presentation of marketing strategies such as product quality, ingredients, and packaging irrespective of the geographical location of the market. On the other hand localization entails adapting and tailoring marketing strategies to suit unique needs of the local market (Akgun, Keskin & Ayar 2014: 611). Standardisation provides economies of scale in terms of production, distribution, promotions while localization allows easy acceptability in the local market (Otuedon 2016: 49). Whartley (2012: 2) highlights that Coca-Cola standardization is in minimum differences on the product, price, white wave and red colours while localization is in terms of culture, language and advertising. In its franchise business Daszkowski (2017) explains that Coca-Cola as the franchisor handles marketing and innovation of its brands. It sells the beverage concentrates and ensures uniformity of prices among bottlers within a particular country. Overall, Coca-Cola provides expertise and investments that ensures long-term success of its brands and the franchisee. The franchisee who is the bottler is responsible for manufacturing, storage and distribution of the final product. Coca Cola grants the franchisee exclusive territorial rights during tenure of the franchise. A franchisee works closely with distribution channel members with guidelines of standards of excellence coming from Coca-Cola (Whartley 2012: 2).

In Africa, the history of Coca-Cola according to Coca-Cola Africa (2018) goes as far back as 20th century with the first bottling company established in South Africa in 1938. It then reached Zimbabwe in 1948 when Delta Corporation Private Limited established its bottling company. Ever since this period Coca-Cola has dominated the Zimbabwean beverage industry market share as shown in Figure 1.

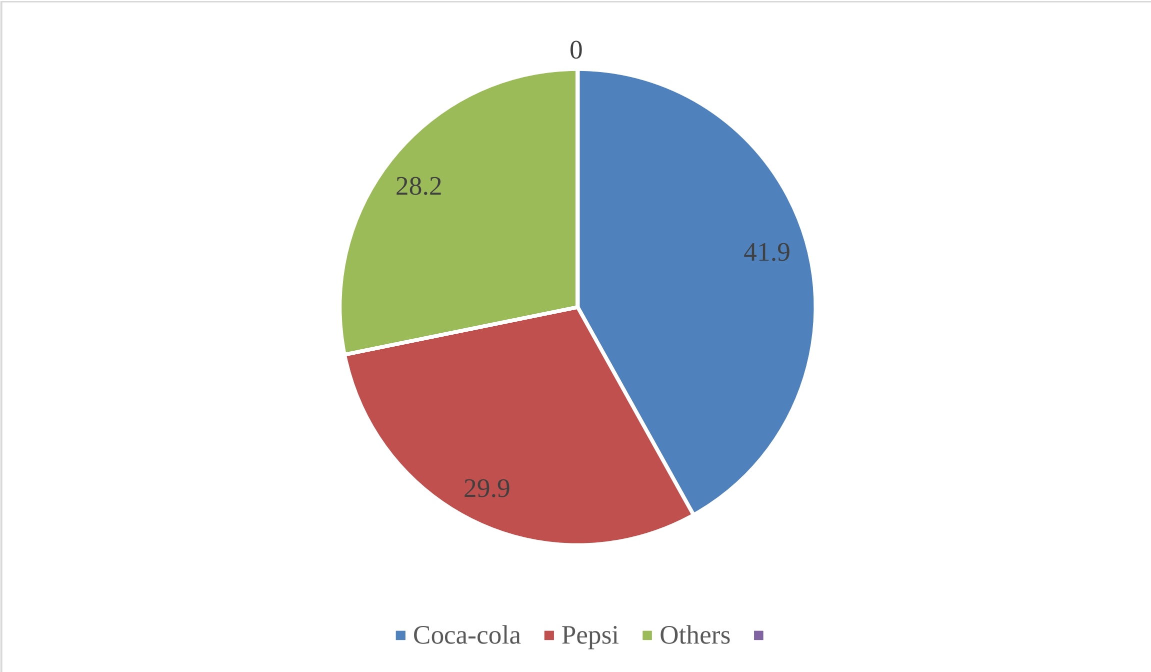


Figure 1: Zimbabwe's Beverage Market Share, 2015

Source: Muronzi (2015).

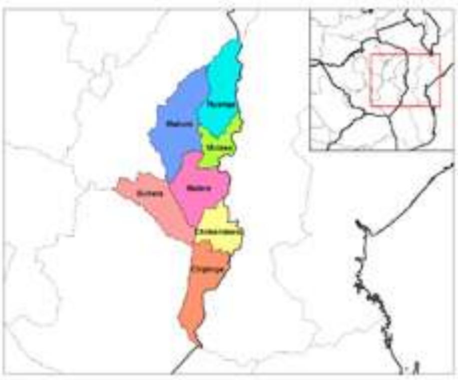
1.1 The Mutare Bottling Company (MBC) franchise business

In Zimbabwe, there are three Coca-Cola franchise businesses namely Mutare Bottling Company (MBC), Delta Beverages (Delta) Private Limited and Schweppes Zimbabwe. MBC covers Manicaland province only, Delta covers the remainder of nine provinces with Schweppes focusing on Coca-Cola non-carbonated beverages that it sells in the whole country. According to Pindula (2014) MBC which is situated in Mutare city was established in 1950 as a family business by the Goldberg family with the objective of being a Coca-Cola bottler. As the company grew from strength to strength, the Goldbergs realised the need for further investment thus they established an investment vehicle called Northunderland Investments. In 2007 Econet Wireless Private Limited Zimbabwe acquired a 69 percent stake of MBC (through its subsidiary Pentamed Investments which included a 6 percent shareholding in the form of convertible instruments) while Northunderland remained with 31 percent minority stake in the company. However, the shareholding since 2014 for Pentamed has reduced to 67 percent while that for Northunderland increased to 33 percent (Pindula 2014).

1.1.1 The Manicaland province market

The Manicaland province Coca-Cola market for MBC is shown in Figure 2.

Figure 2: Manicaland province market



Source: Pindula (2014).

According to Zimstat (2012) the Manicaland Coca-Cola market has the second largest population in Zimbabwe of 1.8 million people composed of 950000 females and 850000 males. This province is located in the Eastern part of Zimbabwe. It borders the following provinces in the country: Mashonaland East in the north, Masvingo in the south and south west and Midlands in the west. On its eastern side Manicaland borders Mozambique's Manica and Gaza provinces. Manicaland province has seven districts namely: Buhera, Chimanimani, Chipinge, Makoni, Mutare, Mutasa and Nyanga. It covers an area of 36, 459 square kilometres.

1.1.2 Coca-Cola franchised products

The MBC Coca-Cola franchise business covers five Coca-Cola brands shown in Table 1.

Table 1: MBC Coca-cola franchised brands

Brand	Flavour
Coca-Cola	Coca-Cola, Cokelight
Fanta	Fanta orange, Fanta grape
Pine nut	Pine nut
Sparletta	Sparletta ginger beer, Sparletta cream soda, Sparletta spar-berry, Sparletta cherry plum
Sprite	Sprite lemonade

Source: Standards Association of Zimbabwe (SAZ: 2015)

The MBC Coca-cola franchise has five product lines which have ten flavours. In as much as Coca-Cola brands have various containers, at the moment MBC has capacity for 300 millilitre bottles and 1litre bottles. It receives Coca-Cola brands in polyethylene terephthalate (PET) containers and cans from sister franchisee Delta Beverages Private Limited. Coca-Cola ensures its brands manufactured at MBC and Delta Beverages Private Limited adhere to local tastes and are uniform. In terms of communication Hepburn (2015) explains that Coca-Cola has 'one brand strategy' for its brands based on the theme 'taste the feeling'. The one brand strategy aims to unite the different Coca-Cola products under one campaign. As a result advertisements are based on the theme 'taste the feeling'. All communication is coordinated from Coca-Cola Central Africa. Advertisements are featured on electronic, billboard and interactive media (Hepburn 2015).

1.2 MBC Coca-Cola franchise competition

The main competitors for MBC Coca-Cola include Pepsi, Schweppes, Dairibord and Dendairy shown in Table 2.

Table 2: MBC competitors in Zimbabwe, 2019

Competitor	Brand(s)	Source
Pepsi	Pepsi Cola, Pepsi Diet, Mirinda, Mountain Dew, 7 Up	Varun Pepsi 2017
Schweppes	Ripe 'n Ready: pineapple, raspberry, cream soda, lemon & orange Minute Maid: pulp, mango, apple, pineapple, applegrape, tropical, exotic & orange Novida: pineapple & mandarin Fruit cordials: Mazoe flavours, Calypso flavours & Tavern flavours	Schweppes 2017
Dairibord	Cascade, Nutriplus, Fun 'n fresh Pfuko maheu, Fruit Cordials: Lyons Quench	Dairibord 2011
Dendairy	Citro: tropical, pineapple, orange & banana Milk shake: chocolate, strawberry & banana Fruit juice: mango and orange, orange, red grape & apple	Dendairy 2017

1.2.1 Pepsi Private Limited

PepsiCo Private Limited has a diversified portfolio comprising the production and marketing of beverages, restaurants and snacks. It is the only Coca-Cola direct competitor in soda based beverages in Zimbabwe. The history of Pepsi beverages according to Tucker (2013: 98) in the Zimbabwean market goes back to 1948 when a plant was opened in neighboring South Africa. Canada Dry Rhodesia Private Limited held Pepsi franchise to bottle and distribute Pepsi brands in Zimbabwe. Moses and Vest (2010: 241) highlight that in 1960

Pepsi brand was used to sponsor jazz artist Louis Armstrong for a tour of Zimbabwe as part of the brand promotion. In the same year, Matsika (2019) shows that Rhodesian Breweries' Central African Bottlers took over Pepsi franchise through acquisition of Canada Dry Rhodesia Limited. Again in 1962 Pepsi franchise changed hands to Schweppes through acquisition of Central African Bottlers. Schweppes kept the franchise until 1989 when it was transferred to United Bottlers. When Coca-Cola took over Schweppes in 2001 it dropped off from the market Pepsi and Tarino brands. Thereafter Pepsi brands came in dribs and drabs as imports from neighboring countries such as Namibia, Mozambique and Zambia where it had operations. However, Thondlana (2016) explains that in 2016 Pepsi re-entered the Zimbabwean market through Varun Beverages which opened a US$30m plant in Harare. This plant has capacity to produce 600 bottles per minute and 400 cans per minute. Varun Beverages has leveraged on this to import Pepsi brands such as Pepsi Cola, Mirinda and 7 Up from its plants in the neighbouring countries. With currencies in neighbouring countries being depreciated against US$ used in Zimbabwe, Pepsi brands are competitively priced. Its 250ml PET and cans are selling for US$0.50.The use of disposable PET or can is appealing to the consumer as it is convenient compared to returnable bottles that require a customer to pay an extra charge for the bottle.

1.2.2 Schweppes

Schweppes (2017) highlight that just like MBC is a subsidiary of Coca-cola franchise in Zimbabwe. This subsidiary relationship led to MBC being a distributor of Schweppes products until 2017 when it became unprofitable to sustain the relationship. However, it has continued to do its business at its own distribution centre in Mutare. Schweppes (2017) shows the history of Schweppes in Zimbabwe stretches to 1930 when Arthur Sturgess began manufacturing its flagship Mazoe Orange Crush which is a cordial in Bulawayo, Zimbabwe's second largest city. Over the years it moved into other Schweppes brands such as Krest and Tarino. As alluded earlier, Schweppes took over Pepsi franchise in 1962 from Central African Bottlers until 1989 when it transferred it to United Bottlers. In 2001, Schweppes became part of Coca-Cola. Schweppes is a strong competitor especially in cordials and juices. Its low priced Ripe 'n Ready beverage brand is also strong in the low end market. Its greatest advantage over MBC is that it has no boundary limitations. However, as a Coca-Cola brand it has strong promotional budgets. Its flagship brands Mazoe Orange Crush, Minute Maid and Novida dominate the cordial and juice markets. Mazoe Orange Crush is a heritage brand for Zimbabwe and has made inroads into the SADC region and beyond and has great potential as a global brand (Schweppes 2017).

1.2.3 Dairibord

Dairibord Holdings Limited (2011) shows that Dairibord was established in 1952 in Zimbabwe. It is involved in milk, non-soda beverage and food production. Dairibord also has operations in Malawi called Dairibord Malawi a joint venture with Malawian government which it acquired in 1998. Amongst the major beverage competitors, Dairibord is the only other player with strong presence in Manicaland province market and it has two plants in Manicaland province (i.e., Mutare and Chipinge). In 2001 it acquired Lyons which has a very strong brand in non-soda beverages Cascade. Cascade is a dairy fruit beverage. It is packaged in a disposable PET 400ml container and is sold at US$0.50. Over the years Dairibord has added other beverages namely Nutriplus, Fun 'n fresh and Pfuko Maheu (Dairibord 2017).

The greatest strength for Dairibord lies in its robust supply chain for milk. The company has strong strategic partnerships with smallholder and large-scale dairy farmers through supporting milk producers financially and with technical expertise. It has milk collection points close to the farmers and an extensive transport system. This ensures it gets reliable supplies of fresh milk. In 2016 it realized an 11% increase in milk supply as a result of its heifer support programme to farmers. The company according to Dairibord (2017) has a number of advertising in conventional and unconventional media. Dairiboard also sponsors the popular Zimbabwe Schools Rugby festival. The company is a major benefactor of a number of orphanages and old people's homes. In addition, Dairibord has intensive distribution network through wholesalers, retailers and kiosks. Notably the company has the most advanced network of vending carts. This vending system ensures cost effective delivery of the product to the consumer and addresses cash shortages for the company. Dairibord also has a strong environmental policy that ensures compliance with relevant environmental statutes (Dairibord Holdings 2011).

1.2.4 Dendairy

Dendairy (2017) shows that Dendairy is a relatively new company having been established in 2004. It is based in Kwekwe which is in the Midlands province. Mhlanga (2015) explains that it produces milk products and beverages. It has just began exporting into Mozambique. It also has interests in dairy farming and that gives the company an advantage in terms of the flow of its dairy supplies. Dendairy has begun increasing its herd of dairy cows so as to boost milk supplies. It now has set up distribution centres in all the major towns of the country including Mutare and Harare. Its promotional activities are at nascence having started with sponsorship of sporting activities in Kwekwe city and national level such as Kariba Half Marathon. It is also a major benefactor of a number of orphanages in the country (Dendairy 2017).

1.2.5 Illegal imports

The greatest headache for MBC has been from Coca-Cola brands smuggled into the country from neighbouring Mozambique. Informal traders are smuggling goods which include Coca-Cola brands into Zimbabwe. The seriousness of smuggling into Zimbabwe has been lamented by the country's industry body the Zimbabwe National Chamber of Commerce (ZNCC: 2016) which estimates that the country is losing US$2 billion annually due to smuggling of goods through the country's porous borders. Transparent International Zimbabwe (TIZ: 2017) list Forbes Border Post which is adjacent to Mutare city as one of the most porous borders. This smuggling is motivated by the fact that Zimbabwe is a dollarized economy hence with depreciated currencies in neighboring countries it is enticing to smuggle goods into the country. The problem has also been exacerbated by high unemployment and low disposable income in the country. Therefore, it is highly profitable for the unemployed youths, border post officials and retailers to be involved in the smuggling syndicate. Consequently, local companies such as MBC have lost business to smuggled goods which enter the country at low prices. MBC strongly believes the decline in its revenue and sales as shown in Table 4 is linked to this rampant smuggling.

Table 4: Reduction in revenue and sales at Mutare Bottling Company 2014 to 2016

2014-2016	**% decrease**
Revenue	-20%
Sales	-17%

Source: The Source (2016).

1.3 Production

NewZimbabwe (2014) shows that in 2014 MBC audited its production and realized that it had plummeted from 10000 bottles a day to 6000 bottles (2.1 million cases to 1.9 million cases. A case has 24 bottles).

1.4 Pricing

The prices for beverages in Zimbabwe is shown in Table 5.

Table 5: Beverages prices in 2017

Brand	**Coca-Cola 300ml bottle**	**Coca-Cola 330m can**	**Pepsi 330ml pet/can**	**Cascade 400ml**	**Dendairy Citro 100ml**	**Dendairy Juices 1 litre**
Price(US$)	0.50	0.80	0.50	0.50	0.15	1.80

Source: Own compilation, 2017

In line with the Coca-Cola franchise system the prices of Coca-Cola brands are regulated by the franchisor. Coca-Cola ensures there is uniform prices amongst its brands in the country. With increasing competitive pressures Coca-Cola has been forced to review downwards its prices. Its 300 millilitres bottle was reduced from US$0.60 to US$0.50. In order to ensure that retailers do not charge beyond stipulated US$0.50 Coca-Cola has a slogan *"just for fifty cents, why pay more"* in all its communication. With this price adjustment prices for beverages range from US$0.15 to US$1.80 in Zimbabwe.

1.5 Market demand

In recent years soda beverages have suffered a barrage of criticism by organisations such as World Health Organization (WHO: 2016) as causing a spike in lifestyle diseases such as obesity, diabetes and tooth decay. In light of this criticism, they have advocated for policies that lead to increase in prices by at least 20% so as to de-market these soda beverages. The western market has responded to this thus companies like Coca-Cola have witnessed decline in demand (WHO 2016). According to van Walbeek (2019) countries such as Mauritius, Chile and UK have taxed soda beverages to discourage their consumption. However, the African market which has recently experienced improved lifestyle with growing economies has provided a new frontier for Coca-Cola. In Zimbabwe MBC has realized this potential and therefore in 2014 carried out a market capacity analysis survey as part of its planning. The results are shown in Table 6.

Table 6: Forecasted market demand

Year	**2014**	**2017**	**2020**	**2022**	**2025**
Annual demand (cases in millions)	2.1	2.5	2.9	3.2	4

Source: The Source (2014).

1.6 New plant

MBC has realized that there is great potential in its firm's growth. Therefore, NewZimbabwe (2014) noted it acquired a new plant from Sidel SpA in Italy worth $17 million. The new plant is a returnable glass bottling automated plant and has potential to greatly improve company performance as shown in Table 7.

Table 7: New performance levels 2014

Activity	**Benefit**
Hourly production	30000 bottles
Annual production	6 million cases
Shift hours	9 hours
Packaging	300 millilitre& 1 litre bottle
Cost saving	15%

Source: Own compilation

The new plant and machinery has great potential to improve firm's performance. It will lead to increase in hourly production, annual production, shift hours and cost saving.

1.7 Distribution

In terms of distribution one employee remarked *"we want to put a drop of Coke on everybody's lips"*. This is testimony to MBC approach of both intensive and extensive distribution network. MBC has wholesalers and collection points at all major shopping centres in Manicaland province where it distributes its products using its trucks. The company also has a big distribution centre in Rusape town which is the second biggest town in the province to assist in serving customers around its vicinity. Therefore, retailers can replenish their stocks from nearby wholesalers, collection points and the Rusape distribution centre. MBC also distributes directly to some of its retailers within the province. Business Daily (2013) shows that in 2013 the company acquired seven new DAF trucks which are suitable for the rough terrain roads in Zimbabwe. The firm also provides free refrigeration to its distribution channel members so as to ensure customers enjoy chilled Coca-Cola brands. MBC has also increased its vending units by 160 in Manicaland province. These vending units are located at busy places in the towns and shopping centres in the rural areas. The increase in vending units has helped to retain some of its employees who had been made redundant with the commissioning of the new plant and machinery.

1.8 Sustainability

MBC managing director Allan Lang says "environmental stewardship is the guiding principle in our determination to be the best corporate citizens that we can be as a company." Further he said that; "It is also a key component of our business strategy and part of our value chain efficiency. In addition to improving the quality of our waste, we are very conscious of conserving the water resource available to us". In 2015 MBC installed a $60 000 effluent treatment pretreatment plant that discharges waste water with the recommended pH of 6-9 instead of the previous level of 11 into Mutare City sewer lines. The new systems has a screening device which removes non bio-degradable material such as bottles and plastics. The system has also reduced water usage by 33%. Furthermore, the company retains bottle containers at its factory where they are thoroughly cleaned and re-used for packaging. The broken ones are stocked and shipped to South Africa for recycling.

The safety of employees is also a major concern at MBC. The company has a zero tolerance to occupational hazards. Its walkways and pavements are clearly marked for visitors and workers to follow so as to avoid getting harmed. The work environment is kept clean and free of any obstacles that could hinder emergency evacuations in case of emergency. A wind vane flag is well positioned so that it is conspicuous to all employees. In case of gas leaks, this assists employees to know the safest direction to run against the wind.

1.9 Other challenges

Among the challenges that the company faces are inadequate supplies from the local suppliers. The Source (2016) shows that the company uses an average of 10 tons of sugar per day. The supply of sugar they get from local suppliers is far too low to meet this demand. Therefore, MBC has had to get a license for importation of 300 tons of sugar. Allen Lang the Managing Director of MBC says "the imported sugar is to supplement sugar purchased from local suppliers who cannot supply all our requirements for bottler grade sugar over the next few months''. However, Lang also indicates that sugar sourced from COMESA countries was landing at a lower price than that sourced locally although the product sourced from SADC countries was at par with local suppliers (The Source 2016).

Additionally, the MBC plant manager Erik Makarimayi says shortage of glass packaging in the local market has also resulted in low production of all brands except for Sparletta, Cream Soda and Cherry Plum, which uses similar bottles. The shortage of glass bottles in Zimbabwe is largely attributed to the closure of Zimglass in 2010 which traditionally provided glass containers for the local industry. This has meant MBC has to import glass from other countries such as South Africa, Tanzania, Egypt and Middle East (The Source 2016).

II. Conclusion

In the short to medium term the Coca-Cola MBC franchise has great growth potential in Zimbabwe provided the country's economy continues on a recovery path. This based on the fact that Zimbabwe like all other growing African economies provides Coca-Cola with a growing market unlike Western markets where demand has plummeted due to growing health concerns. Given this market opportunity Coca-Cola MBC should develop clear strategies for the short to medium term as well as for the long-term. In the short to medium term it needs to be wary of losing market share to Pepsi whose brands popularity in the market is growing. Pepsi popularity is largely attributed to its market penetration strategy which makes its brands cheaper than Coca-Cola brands. In this price-sensitive market Coca-Cola needs to adopt cost reduction strategies so that its brands are competitively priced .On another note Coca-Cola MBC should have strategies to counter competition from less sugary beverages which are generally healthier. These include fruit juice mixes such as Schweppes Mazoe and Lyons Cascade. Similarly, the rising demand for the local traditional maize based beverage which is healthier and more natural such as Dairibord Pfuko maheu brand needs attention. Moreover, the Zimbabwean government may follow other regional governments such as the South African government which has imposed tax on soda beverages so as to discourage their consumption. In light of this Coca-Cola MBC should seriously consider taking onboard healthy beverages such as fruit juices and bottled water as the trend in Coca-Cola international. It should also adapt the use of natural no and low calorie sugar alternatives which are healthier. Moreover, the company should adopt recyclable packaging which is environmentally sustainable rather than continue with plastic and cans.

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