



A WEB OF INTERFERENCE:

**HOW BIG ALCOHOL UNDERMINED HEALTH POLICY
AND POLLUTED PUBLIC DISCOURSE IN 2025**



With 170+ Member Organization from 60+ countries, Movendi International is the largest independent global social movement for development through alcohol prevention. We unite, strengthen and empower civil society to tackle alcohol as serious obstacle to development on personal, community, societal and global level.



Big Alcohol Exposed is Movendi International's initiative to monitor, document, expose, and counter-act the unethical practices of multinational alcohol companies and their front groups.

Big Alcohol Exposed is dedicated to rigorously exposing the Dubious 5 strategies – the activities of alcohol giants to derail alcohol policy development, to hook a new generation of users on their harmful products, to undermine laws, regulations, and institutions, to lie about their intentions and objectives, and to cast doubt over science and the real harm their products and practices are causing.

The platform offers updated profiles of major alcohol producers, case studies of alcohol industry interference, and analyses of harmful practices, with a focus on protecting vulnerable communities.

RESET Alcohol

This report has been supported by RESET Alcohol. A first of its kind, RESET Alcohol is a global initiative that brings together national governments, civil society, researchers, and leaders in public health and alcohol policy to implement three alcohol best-buy policies. RESET Alcohol provides financial, technical, communication and advocacy support to governments, civil society organizations and research institutions, primarily in Latin America, Africa and Asia.

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1. EXECUTIVE SUMMARY

The Big Alcohol Exposed Annual Report 2025 documents how the global alcohol industry responded to mounting political, social, and market challenges by intensifying practices that undermine public health, democratic governance, and effective alcohol policy. Drawing on systematic monitoring, case analysis, and the latest independent research, the report shows that alcohol industry misconduct in 2025 was not isolated or reactive. It followed clear, recurring patterns deployed across countries and policy arenas.

Across regions, alcohol companies and their allies worked to protect sales, market access, and political influence as consumption declined in core markets, social norms shifted – particularly among younger generations – and awareness of alcohol's role in cancer and other noncommunicable diseases increased. Rather than adapting in ways that align with public health goals, the industry escalated political interference, expanded promotion through new digital systems, continued to distort evidence, and reframed alcohol harm as an issue of individual responsibility.

A central finding of the report is that alcohol industry interference escalated as its traditional growth model faced growing constraints. Declining volumes in core markets, investor pressure, and leadership instability did not lead to restraint. They triggered more aggressive lobbying, expanded promotion, and intensified efforts to delay effective alcohol policy.

Three dominant misconduct patterns defined industry behaviour in 2025:

- First, the industry systematically constructed and amplified illicit-trade narratives to derail evidence-based alcohol policy reform. As governments advanced alcohol taxation and other population-level measures to prevent and reduce alcohol harm and strengthen public revenues, industry actors responded by inflating claims about illicit alcohol markets. Dramatic figures were circulated through media, policy submissions, and front groups, often without transparent methodology or independent verification. These narratives consistently shifted attention away from the well-documented harms caused by commercial alcohol and toward fear-based framings that portrayed taxation as dangerous, ineffective, or politically risky. Independent evidence contradicts these claims, yet the illicit-trade distraction remained one of the industry's most dominant tools for derailing, delaying or diluting reform.
- Second, alcohol promotion became increasingly embedded in the digital systems that structure everyday life. In 2025, alcohol companies pushed aggressively beyond traditional advertising into streaming platforms, social media ecosystems, influencer cultures, and ultra-fast delivery services. These environments normalise alcohol use, personalise exposure, and shorten the distance between promotion

and purchase. Alcohol is now marketed and sold through the same platforms people use to relax, socialise, and organise daily routines. This integration increases exposure – including among young people – expands attractivity and availability, and undermines existing safeguards designed to prevent and reduce alcohol harm. Promotion is no longer episodic; it is infrastructural.

Third, the industry relied heavily on responsibility narratives to direct attention away from their own products and practices as drivers of alcohol harm. Across markets, alcohol companies promoted “moderation”, “education”, and “personal choice” as primary solutions, despite strong evidence that such approaches do not deliver population-level health benefits. Responsibility messaging functioned as a political strategy rather than a public health intervention. It narrowed policy debates, legitimised industry participation in health discussions, and weakened support for measures that effectively prevent and reduce alcohol harm, including alcohol taxation, limits on availability, and comprehensive protections against marketing protections.

These three patterns reinforced one another. Illicit-trade narratives created fear around effective policy. Digital promotion expanded exposure and availability. Responsibility framing diluted perceptions of risk and shifted blame onto individuals. Together, they protected the commercial conditions on which industry profits depend while obscuring the structural nature of alcohol harm.

Beyond these dominant themes, the report also documents

cases where alcohol industry practices undermined public goods and institutional functioning more directly. These include production practices contributing to water stress, labour exploitation, and regulatory failure, often accompanied by voluntary sustainability claims that substituted for enforceable protections. In each case, social and environmental costs were externalised while profits were protected.

Taken together, the evidence shows that alcohol industry practices function as commercial determinants of health. Corporate strategies shape markets, information environments, and policy processes in ways that sustain affordability, expand availability, normalise alcohol use, and block effective action. Conflict of interest runs through these dynamics, distorting evidence, consultations, and decision-making and weakening policy integrity.

The report concludes that preventing and reducing alcohol harm requires confronting these commercial dynamics directly. Behavioural rhetoric and voluntary commitments are insufficient and often counterproductive. Evidence-based measures – including alcohol taxation, common-sense limits on availability, comprehensive protections against marketing, and robust conflict-of-interest safeguards – remain essential and achievable.

Systematic monitoring is a necessary part of this response. By documenting industry practices as they occur and analysing them collectively, Big Alcohol Exposed strengthens accountability, supports advocacy, and equips policymakers with the context needed to act in the public interest. The findings of the 2025 report show that this is not a moment for accommodation with industry interests, but for vigilance, ambition, and evidence-based leadership.

METHODOLOGY

The Big Alcohol Exposed Annual Report 2025 is based on continuous, systematic monitoring of alcohol industry conduct throughout the year. Monitoring was conducted globally and focused on practices that shape alcohol policy, public discourse, market conditions, and alcohol harm.

During 2025, the Movendi Big Alcohol Exposed team captured and reviewed more than 1300 media stories documenting alcohol industry misconduct and other industry developments. These materials formed the core empirical basis for the analysis and conclusions presented in this report. The stories covered a wide range of countries, companies, and policy arenas, allowing patterns to be identified across contexts rather than inferred from isolated cases.

The captured material was analysed to identify recurring narratives, tactics, and strategies used by alcohol companies and industry-linked actors. From this broader body of evidence, a selection of cases was developed into in-depth misconduct reports and published on the Big Alcohol Exposed website. These case reports are publicly available and open for scrutiny, enabling external verification and transparency.

To ensure the report remains grounded in the latest academic evidence, a structured literature search identified 77 independent, peer-reviewed studies published in 2025 or late 2024. These studies were analysed and categorised using the Dubious Five framework – Deception, Manipulation, Political Interference, Promotion, and

Sabotage – to move beyond individual findings and identify collective corporate strategies documented in the scientific literature.

In addition to media monitoring and academic review, the analysis draws on publicly available sources including corporate communications, financial and investor reporting, industry trade media, lobbying disclosures, policy submissions, marketing materials, investigative journalism, and regulatory documents. These sources were reviewed on an ongoing basis to track how industry strategies evolved and how they were deployed in response to policy developments.

The report does not rely on single incidents or exceptional cases. It examines how alcohol industry practices recur, reinforce one another, and operate as part of a broader system. While the monitoring effort was extensive, the report does not claim to capture every instance of alcohol industry misconduct in 2025.

Together, this systematic monitoring makes alcohol industry influence visible and traceable, providing advocates and policymakers with the context required to protect public health and democratic integrity.



CALL TO ACTION

The findings in this report underscore the urgency of countering Big Alcohol's harmful practices. Public health advocates, researchers, and policymakers must remain vigilant in exposing these tactics and advancing evidence-based policies to protect communities from alcohol harm.

The Big Alcohol Exposed Annual Report 2025 aims to empower these efforts, providing critical insights and resources to challenge the alcohol industry's influence and promote healthier, more equitable societies.

2. INTRODUCTION

The *Big Alcohol Exposed Annual Report 2025* examines alcohol industry conduct observed during 2025 and its implications for public health, communities, and policymaking. The focus is on how commercial strategies shape alcohol availability, marketing, evidence production, and political processes.

The report analyses recurring practices across countries and companies. Individual cases are used to identify patterns that protect commercial interests and constrain the adoption of solutions that prevent and reduce alcohol harm. The scope is global, with attention to how industry behaviour adapts to changing markets, growing scrutiny, and policy reform.

Big Alcohol Exposed is a monitoring initiative documenting alcohol industry practices worldwide. It tracks company actions, front groups, lobbying activity, marketing systems, and production impacts that influence alcohol harm, alcohol policy and public discourse.

The platform publishes case analyses and thematic syntheses based on publicly available sources. All cases are accessible online for scrutiny and verification.

Monitoring activity expanded in 2025, covering a wider range of regions, policy arenas, and corporate strategies. Investigations addressed political interference, marketing through digital and cultural platforms, industry-funded evidence, and production-related harms affecting communities and workers.

Findings informed policy submissions, supported civil society advocacy, and contributed to investigative media coverage. Collaboration with partner organisations strengthened analysis and ensured relevance to ongoing policy debates.

The scale and coordination of industry activity observed during the year underscore the need for sustained and systematic monitoring.

The term “Big Alcohol” refers to more than just a handful of multi-national corporations. It describes a global system of corporate power that includes major producers, their subsidiaries, trade associations, and a sophisticated network of front groups. This system operates with a level of coordination and resources that far exceeds the capacity of many individual governments to regulate it.

In 2025, this system has been under significant pressure. Changing social norms, growing awareness of the link between alcohol and cancer, and the rise of sober curiosity among younger generations is threatening traditional alcohol industry growth models. In response, Big Alcohol has doubled down on aggressive, often unethical and even predatory tactics to maintain dominance and protect profits. From “wellness washing” that reframes alcohol as self-care to “smokescreen strategies” that use illicit-trade fears to derail pro-health taxes, the industry’s methods are designed to preserve a status quo that benefits their profit maximisation agenda.

2. INTRODUCTION

The inherent conflict of interest – alcohol profits vs public good

The alcohol industry's commercial interests conflict directly with the well-being of people and communities. Alcohol companies generate revenue from products linked to disease, injury, violence, and social harm. A substantial share of profits depends on high-risk alcohol use. Policies shown to prevent and reduce alcohol harm – including higher prices, limited availability, and limits on alcohol marketing – reduce population-level consumption and constrain commercial growth.

That conflict shapes industry conduct across communication, policy engagement, and market strategy. Public messaging consistently frames alcohol harm as a matter of individual behaviour, positioning responsibility, moderation, and personal choice as the primary solutions. This framing shifts attention away from the commercial and structural conditions that drive alcohol use, including pricing, availability, and pervasive promotion.

Voluntary alcohol industry initiatives play a similar role. Industry-designed codes, information schemes, and partnership programmes are presented as progress while remaining limited in scope, optional in application, and controlled by the companies themselves. These initiatives absorb political attention and risks delaying measures with proven impact.

Risk communication follows the same logic. Evidence linking alcohol to cancer, mental health conditions, and other harms is acknowledged selectively – if at all – and reframed as uncertain or presented without clear implications for policy. Alcohol industry engagement in policy processes reinforces these dynamics. Industry actors seek access to consultations, advisory bodies, and reform discussions, positioning themselves as legitimate stakeholders. This access enables influence over problem definition, policy framing, and perceived feasibility, often resulting in diluted ambition and slower adoption of measures that effectively prevent and reduce alcohol harm.

Across regions and over time, these practices are consistent. They reflect a business model facing increasing pressure from public health evidence, changing social norms, and growing support for evidence-based alcohol policies.

2. INTRODUCTION

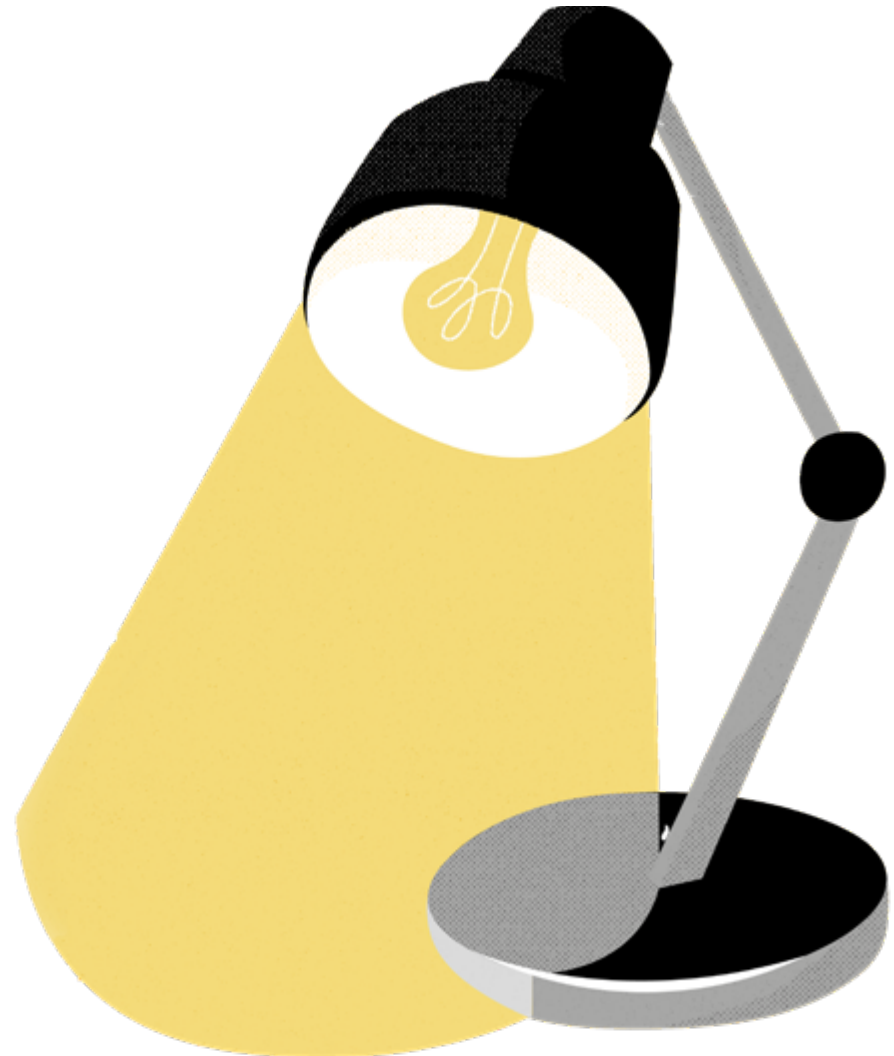
Why systematic monitoring matters for public health and community wellbeing

Alcohol harm is unevenly distributed, with disproportionate impacts on communities facing economic disadvantage, insufficient regulatory capacity, or resource scarcity. Alcohol industry influence further narrows policy space by shaping agendas, framing problems, and delaying effective action.

Much of this influence operates through mechanisms that are difficult to observe in isolation. Front groups present alcohol industry positions under neutral labels. Commissioned evidence circulates without transparent disclosure of conflicts of interest. Marketing is embedded in everyday cultural settings that normalise alcohol use and expand availability. Political interference accumulates incrementally, affecting decisions long before formal votes or legislation.

Systematic monitoring makes these dynamics visible. By documenting practices as they occur and analysing them collectively, Big Alcohol Exposed supports advocates and policymakers working to protect public health and community wellbeing.

The 2025 report contributes to this accountability effort by mapping how industry strategies operate in practice, how they reinforce one another, and why continued exposure remains necessary.





3. BIG ALCOHOL IN CRISIS: A SYSTEMIC BREAKDOWN AND ITS CONSEQUENCES FOR PUBLIC HEALTH

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HOW CORPORATE CRISIS SUPERCHARGES POLICY INTERFERENCE

The global alcohol industry entered 2025 facing a convergence of pressures that fundamentally undermine its profit-maximization and growth model. The year 2025 marked a turning point for the global alcohol industry. What corporate leaders and industry-aligned commentators long framed as temporary disruption has crystallised into a systemic crisis. Across beer, wine, and liquor, the alcohol industry faces declining consumption, changing social norms, collapsing growth narratives, faltering investor confidence and growing investor revolt, and unprecedented leadership instability and turnover.

This chapter sets the scene for the rest of the Big Alcohol Exposed Report 2025. It establishes a central insight that runs through all subsequent analysis: **as Big Alcohol's commercial model comes under pressure, industry interference in public policy intensifies.** Crisis does not soften corporate behaviour. It hardens it.

This dynamic – declining legitimacy paired with escalating interference and marketing activity – defines the alcohol industry's posture in 2025.

What this chapter reveals is a diagnosis of power under strain. It explains why alcohol industry interference escalated in 2025 and why public health needs to be prepared for escalating alcohol industry resistance.



3. BIG ALCOHOL IN CRISIS: A SYSTEMIC BREAKDOWN AND ITS CONSEQUENCES FOR PUBLIC HEALTH

A SYSTEMIC CRISIS, NOT A CYCLICAL DOWNTURN

For decades, Big Alcohol presented itself as resilient: immune to health evidence, policy reform, and changing social norms. That narrative no longer holds. For years, alcohol producers framed slowing sales as temporary: post-pandemic normalisation, inventory corrections, or short-term economic headwinds. By 2025, this narrative has collapsed.

Across markets and product categories, the same signals repeat:

- Declining volumes in core markets,
- Persistent inventory build-ups,
- Falling market capitalisation,
- Repeated profit warnings, and
- Boardroom instability.

According to Financial Times reporting, analysts increasingly describe alcohol as a low-growth, high-risk sector, with structural similarities to tobacco rather than

to resilient consumer goods. Reuters reporting documents how even the industry's largest firms now rely on cost-cutting, asset sales, and price increases to defend profit margins.

Movendi International's analysis in *Big Alcohol Under Pressure: Falling Profits, Failing Strategies* documented a sharp shift in market conditions. Alcohol sales declined across major markets, alcohol industry growth engines stalled, and stock market valuations fell steeply for most major producers. The diagnosis is clear: the alcohol norm is being replaced, alcohol consumption is declining, and investors are re-pricing alcohol as a long-term risk sector.

Multiple indicators confirm this systemic shift:

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A SYSTEMIC CRISIS, NOT A CYCLICAL DOWNTURN

Multiple indicators confirm this systemic shift:

- Alcohol use is declining in high-income markets, with historic lows in youth and young adult consumption,
- Market value has plummeted across most major alcohol companies,
- Boards and investors are losing patience, triggering CEO exits and restructurings, and
- Growth is increasingly dependent on price manipulation, premiumisation, and expansion into less-regulated markets.

The alcohol industry is not experiencing a temporary slowdown; it is confronting a structural breakdown of its growth assumptions.



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WHAT IS DRIVING THE CRISIS: STRUCTURAL FORCES AT WORK

The changing alcohol norm

At the heart of the alcohol industry crisis lies a social transformation. Alcohol is losing its position as a default, unquestioned part of everyday life – especially among younger generations in many Western societies. The most consequential driver of the crisis is cultural.

Data shows:

- A rise in people who are sober curious and people who want to live free from alcohol.
- Nearly half of young adults in some markets report never using alcohol.
- A growing perception that even low levels of alcohol use harm health.

According to Financial Times reporting, younger generations increasingly associate alcohol with health risks, reduced productivity, and mental strain. Multiple surveys show historic lows in youth and young-adult alcohol use.

This norm shift directly erodes the industry's future consumer base and long-term customer pipeline.



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WHAT IS DRIVING THE CRISIS: STRUCTURAL FORCES AT WORK

Health awareness and evidence catching up

Scientific consensus on alcohol harm – particularly regarding cancer, mental health, cardiovascular disease, and metabolic impacts – keeps growing and has gained public visibility.

According to New York Times reporting, health concerns increasingly shape consumer behavior across wine, beer, and liquor. For Big Alcohol, this presents a fundamental conflict: reduced consumption improves population health while undermining corporate profit.

This conflict explains the alcohol industry's sustained opposition to alcohol taxes, health warning labels, dietary guidelines, and WHO recommendations.



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WHAT IS DRIVING THE CRISIS: STRUCTURAL FORCES AT WORK

Biomedical disruption: weight-loss drugs

The rapid uptake of GLP-1 medications such as Ozempic and Wegovy adds a new structural headwind for Big Alcohol. According to Financial Times and Forbes reporting, users consistently report reduced desire for alcohol, reinforcing broader consumption declines.

This is not a lifestyle trend the industry can reframe. It is a biological disruption of population-level alcohol consumption.

Economic pressure and affordability

Inflation and cost-of-living pressures accelerate alcohol use decline, particularly in premium categories. According to Attest research, many consumers now actively deprioritise alcohol spending. But crucially, these pressures interact with, rather than explain away, the norm shift. They magnify the alcohol industry turmoil. They expose the fragility of an already shrinking consumer base.

People are not only buying less alcohol because it is expensive. People are choosing not to prioritise it.



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CRISIS ACROSS ALL SECTORS: BEER, WINE, AND SPIRITS

Beer: long-term contraction behind price increases

The beer sector illustrates structural decline most clearly. European beer consumption has fallen steadily since 2019, with tens of millions of hectolitres disappearing from the total alcohol consumption. Production, exports, and on-trade sales continue to contract.

According to Reuters reporting, the beer industry increasingly relies on price increases, cost-cutting, and financial engineering to protect profits despite falling volumes. Brewers of Europe data confirms sustained contraction in production and consumption.

The beer industry's pivot to no- and low-alcohol beer functions primarily as brand preservation. It maintains alcohol brand visibility in sport and culture while defending future alcohol sales and political legitimacy. This is a commercial strategy, not a public health alignment.

The Big Beer crisis response is revealing:

- Aggressive cost-cutting and consolidation,
- Aggressive push to saturate culture, sport, and identity with alcohol brands,
- Heavy focus on protecting profit margins, and
- Strategic pivot to “no-alcohol” beer as a brand-preservation tool.

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CRISIS ACROSS ALL SECTORS: BEER, WINE, AND SPIRITS

Wine: oversupply and existential crisis

The wine sector faces the most acute imbalance. Global wine consumption has fallen to its lowest level in more than six decades. But wine production capacity remains high. Unlike liquor, wine cannot simply pause production. Oversupply becomes existential.

According to Decanter reporting, oversupply now defines the sector, with vineyard abandonment, emergency distillation, and government intervention across the European Union, including France, Portugal, Germany, as well as California, and Argentina. Financial Times reporting describes the situation as a global glut with no easy exit.

The wine industry and media increasingly describe the wine sector as being “in crisis” or “battling for survival.” Governments are increasingly asked to intervene with subsidies, emergency distillation, and promotional support. The wine industry increasingly frames this crisis as cultural

and rural protection. For public health advocates, this signals rising pressure to dilute safeguards under the guise of economic rescue.

This matters for alcohol policy and public health because the wine industry frequently claims cultural exceptionalism. In crisis, those claims intensify – often used to resist alcohol taxation, health warnings, advertising bans and other alcohol policy solutions.

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CRISIS ACROSS ALL SECTORS: BEER, WINE, AND SPIRITS

Liquor: the premiumisation hangover

Liquor producers long relied on premiumisation to offset declining volumes. In 2025, this strategy faltered.

According to Reuters and Financial Times reporting, spirits companies accumulated unprecedented inventories – described as “lakes of unsold spirits” – after demand failed to meet optimistic forecasts.

Premiumisation delayed the reckoning; it did not prevent it. Spirits were long portrayed as the industry’s growth engine. In 2025, that narrative collapsed.

Major spirits producers accumulated unprecedented inventories – tens of billions of dollars’ worth of ageing stock – based on optimistic demand forecasts that failed to materialise. Production halts, asset sales, and price pressure followed.



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CRISIS ACROSS ALL SECTORS: BEER, WINE, AND SPIRITS

Multinational turmoil and investor discipline

One of the clearest signals of crisis is governance instability.

The alcohol industry crisis is visible in boardrooms. 2025 saw an unusual concentration of CEO exits and leadership changes across multiple Big Alcohol giants.

According to Reuters reporting, investor dissatisfaction drove leadership turnover at companies including Diageo, Heineken, Rémy Cointreau, Moët Hennessy, Treasury Wine Estates, and major brewers in Asia-Pacific. Financial Times reporting documents prolonged CEO searches, forced departures, and escalating shareholder pressure for rapid restructuring.

This governance instability reflects capital disciplining a declining sector, not renewal or transformation.

Alcohol industry shareholders demand:

- Faster restructuring,
- Asset disposals,
- Higher short-term returns, and
- New growth stories – often in emerging markets with a lack of alcohol policy protection for the populations.

This shareholder logic matters for public health because it drives alcohol industry practices that directly conflicts with evidence-based alcohol policy.

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WHAT THE CRISIS MEANS FOR PUBLIC HEALTH AND ALCOHOL POLICY

The risk: escalation of interference

As commercial pressure intensifies, the need to interfere grow stronger. According to Movendi's analysis in Big Alcohol's Growing Woes: A Systemic Crisis and the Industry's Aggressive Response, crisis conditions increase:

- Lobbying against alcohol taxation, and marketing and availability standards,
- Attacks on WHO and public health science,
- More aggressive expansion into markets with a lack of alcohol policy measures, and
- Manufactured backlash against evidence-based alcohol policy.

This behaviour follows a familiar pattern across unhealthy commodity industries. It is predictable corporate behaviour under pressure.



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WHAT THE CRISIS MEANS FOR PUBLIC HEALTH AND ALCOHOL POLICY

The opportunity: the resilience myth collapses

At the same time, the alcohol industry's legitimacy is receiving greater scrutiny. The industry myths that alcohol policy threatened a stable, socially beneficial industry loses credibility when analysts openly describe structural decline, oversupply, investor revolt, and when the harms caused by alcohol products and the predatory practices and misconduct of alcohol companies come into ever sharper focus. Policymakers gain space to prioritise people's health, governments' revenue, and social wellbeing over corporate profit maximisation.

For alcohol policy advocates, this moment opens space for decisive action grounded in health, equity, and democratic integrity. **Alcohol policy progress becomes possible as the alcohol industry's legitimacy evaporates.**



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CONCLUSION

This chapter shows that the alcohol industry's deepening commercial crisis produces escalation of its predatory marketing and aggressive lobbying practices. As population-level alcohol use declines, social legitimacy erodes, and investors demand faster returns, Big Alcohol intensifies efforts to protect its core profit drivers: product affordability, marketing reach, and privileged political access.

Corporate pressure translates directly into political interference behaviour. When growth stalls, the industry mobilises against alcohol taxes, marketing and availability regulation, attacks evidence of health harms, such as cancer, cardiovascular disease, and mental health conditions, and pushes false narratives to pollute the public discourse. These actions aim to stabilise sales and reassure shareholders. Crisis conditions therefore sharpen the alcohol industry's incentive to interfere against public health policy rather than to adapt its business model to societal realities.

The chapters that follow document how this dynamic unfolded in 2025. They trace the concrete application of the Dubious Five strategies across countries, institutions, and policy arenas, revealing a consistent pattern: as Big Alcohol's business model weakens, its interference becomes more coordinated, more aggressive, and more global. Public health advocacy must respond with equal clarity, resolve, and preparedness.



3. BIG ALCOHOL IN CRISIS: A SYSTEMIC BREAKDOWN AND ITS CONSEQUENCES FOR PUBLIC HEALTH

METHODOLOGY: HOW THIS CHAPTER WAS BUILT

This chapter is based on **systematic, daily monitoring of the global alcohol industry throughout 2025**, conducted by Movendi International as part of the Big Alcohol Exposed initiative.

Continuous monitoring

Every day, Movendi International tracked:

- International financial and business media,
- Alcohol trade press and industry intelligence platforms,
- Company disclosures about earnings and investor sentiments, and
- Investigative journalism and policy reporting.

This monitoring feeds into Movendi's Resource Center, Media Snapshots, Science Digests, and Big Alcohol Exposed misconduct case library.

Scale of evidence

The analysis synthesises **530+ media reports, financial analyses, and industry documents**, covering beer, wine, and spirits across all world regions.

The aim is to identify **patterns**: recurring signals of decline, repeated corporate responses, and consistent links between financial pressure and Big Alcohol's political behaviour.

Alcohol industry narratives were assessed critically against independent evidence and observed behaviour.



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4. GLOBAL MISCONDUCT PATTERNS – HOW THE INDUSTRY PROTECTED ITS COMMERCIAL INTERESTS IN 2025

4. GLOBAL MISCONDUCT PATTERNS – HOW THE INDUSTRY PROTECTED ITS COMMERCIAL INTERESTS IN 2025

Big Alcohol's misconduct in 2025 followed a clear pattern. Across regions and platforms, the industry used coordinated strategies to shape political debate, delay or derail more effective alcohol policies, and protect the commercial practices that fuel alcohol harm.

Three tactics stood out: inflating illicit-trade fears to derail alcohol policy reforms, embedding alcohol promotion into digital systems that structure daily life, and reframing alcohol harm as a matter of personal behaviour rather than alcohol industry products and practices. Together, these tactics obscured the real drivers of harm and redirected attention away from effective measures that prevent and reduce alcohol harm.

SMOKESCREEN STRATEGY – THE ILLICIT ALCOHOL DISTRACTION

The alcohol industry intensified its illicit-trade narrative in 2025 as more governments advanced pro health-tax reforms to prevent and reduce alcohol harm and strengthen public revenues. Whenever evidence-based policies gained traction, industry actors responded with claims that higher taxes would fuel illicit markets, destroy formal-sector jobs, and endanger consumers. This narrative functions as a strategic distraction: it replaces evidence with fear and shifts political attention away from effective population-level measures.

A key reason this tactic works is the lack of reliable

independent data on unrecorded alcohol in many countries. Industry groups exploit this by promoting their own estimates and framing illicit alcohol as the primary threat – while downplaying the much larger burden caused by their own products and practices.

Independent evidence contradicts this alcohol industry narrative. According to the WHO Alcohol Tax Manual, illicit market levels depend primarily on tax administration, enforcement capacity, and governance – not tax rates.¹ Well-designed tax increases paired with effective enforcement do not cause illicit markets to grow.

4. GLOBAL MISCONDUCT PATTERNS – HOW THE INDUSTRY PROTECTED ITS COMMERCIAL INTERESTS IN 2025

In 2025, pro health-tax reforms moved up the political agenda in many countries for several converging reasons. Governments faced growing pressure to respond to the accelerating NCD crisis, which continues to strain health systems and public budgets. Foreign aid for NCD prevention and treatment has declined, forcing governments to look for sustainable domestic financing. At the same time, WHO has provided clearer and more practical guidance on the design and implementation of effective alcohol taxes, making reform pathways more accessible to policymakers. Communities and civil society groups have also become more vocal, demanding action as evidence of alcohol harm becomes more visible in everyday life. Against this backdrop, alcohol taxation is increasingly recognised as a tool that both improves health outcomes and strengthens fiscal space.

These shifts directly threaten industry profits. As a result, the illicit-trade narrative became a first-line defence, used to delay or dilute reforms. The industry refined this tactic through three recurring elements:

- Inflating the size and growth of illicit markets, often without transparent data or independent verification.
- Shaping media coverage to amplify alarmist framing, ensuring headlines echo industry talking points.
- Portraying alcohol taxation as harmful, claiming it threatens consumers, jobs or economic stability.

Together, these elements redirected political and public attention away from evidence-based measures that effectively prevent and reduce alcohol harm.



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Uganda: Deploying Illicit-Trade Narratives to Obscure the Need for Reform

As Uganda advanced its Alcohol Control Bill in 2024, industry actors intensified efforts to portray illicit alcohol as the country's most pressing alcohol problem. Industry spokespeople repeatedly claimed that “70% of alcohol in Uganda is illicit” and that illicit markets were “growing by 5% each year” – numbers presented as authoritative despite the absence of publicly available independent data.^{2,3} These claims circulated widely in media commentary throughout the year, creating momentum for a narrative that centred illicit alcohol while downplaying the broader commercial alcohol burden.

In early 2025, the alcohol industry helped launch the Coalition Against Illicit Alcohol (CAIA-Uganda), presented as a public interest alliance but including alcohol-industry actors directly. The coalition enabled the industry to amplify its messaging under a seemingly neutral banner and to push talking points closely aligned with its commercial interests, particularly the argument that enforcement alone – not alcohol taxation – should be the political priority.

International developments made the industry double down on this strategy. Extensive media coverage globally as well as in Uganda of methanol poisonings in Brazil offered industry actors in Uganda a new opportunity to intensify illicit-trade fears. CAIA-Uganda drew on those international headlines to suggest Uganda faced similar risks, warning of unsafe products, economic losses, and the dangers of taxing commercial alcohol while “illicit” products were allegedly “out of control”. Ugandan media continued to echo this framing. One headline warned: “Illicit Alcohol and Tobacco Cost Uganda Billions, Fueling a Public Health Time Bomb.”⁴

This narrative obscured the real drivers of Uganda's alcohol burden: the commercial alcohol market's pervasive availability, aggressive marketing, and longstanding lack of effective, evidence-based policy. By persistently redirecting attention toward illicit alcohol, industry actors shift the policy conversation away from the evidence-based population-level measures in the Alcohol Control Bill, toward a narrow debate that favours industry interests and dilutes momentum for meaningful alcohol policy reform.

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South Africa: Entrenching Fear Through Media and Commissioned Numbers

In South Africa, industry-commissioned figures dominated public debate ahead of 2025 excise discussions. One prominent claim was that: “Nearly one in five alcoholic drinks sold in South Africa is illegal.”⁵

Industry organisations and spokespeople warned that illicit trade was “out of control” and draining “billions in lost taxes”, despite independent evidence that enforcement gaps, licensing failures, and uneven oversight – not tax levels – are the main drivers of illicit market dynamics.⁶

These claims risk shifting political attention toward partnerships with the alcohol industry and away from evidence-based solutions such as more ambitious alcohol taxes and common-sense limitations on availability and alcohol marketing.



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Kenya: Fear-Based Messaging and Policy Distraction

In Kenya, as the National Policy for the Prevention, Management & Control of Alcohol, Drugs and Substance Abuse advanced, industry groups amplified warnings that higher prices would push people toward illicit products. Media stories repeated narratives such as: “High alcohol prices have fuelled a booming underground trade in methanol-laced brews.”⁷

This narrative overshadowed evidence that tax-compliance issues in the formal sector – including nearly 10 million missing excise stamps – contributed significantly to the presence of unrecorded alcohol in the market.⁸ Yet industry messaging focused exclusively on informal producers and used illicit-trade fears to undermine support for public-health-oriented tax policy.



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Brazil: Illicit-Trade Distractions During Tax Reform

In Brazil, alcohol producers promoted illicit-trade narratives during the 2025 tax reform debate. A widely cited estimate claimed: “R\$ 28 billion in tax losses due to counterfeit beverages.”⁹

The estimate was repeatedly invoked by industry associations to argue that tax increases would incentivise smuggling and worsen enforcement challenges. When a methanol poisoning crisis occurred, some industry voices attempted to link the tragedy to high taxes, despite evidence that the crisis resulted from regulatory gaps and weak market oversight, not taxation.



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Mexico: Inflated Estimates to Undermine Tax Reform

In Mexico, the industry-linked front group CIVyL launched a coordinated media push during the 2024–2025 discussions on more ambitious alcohol taxation. Central to this effort was a commissioned report claiming that illicit alcohol dominated the market. The study asserted that: “Four out of every ten bottles of alcohol sold in Mexico are fake.”¹⁰

This figure was presented as a national crisis, and major media outlets repeated it without scrutiny. CIVyL framed the issue as a threat to consumer safety and government revenue, positioning tax reform as a driver of criminal activity rather than a proven measure to prevent and reduce alcohol harm.

The narrative followed the same pattern observed in other countries: dramatic numbers without methodological transparency, strategic timing ahead of tax debates, and an insistence that alcohol taxation is harmful and should be the political priority.



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Vietnam: Repeating the Global Template

In Vietnam, as alcohol tax discussions gained momentum, industry actors repeated global illicit-trade talking points. Although no independent data supported these dramatic claims, the narrative followed the same pattern as in Africa and Latin America: exaggerate illicit-market risks, frame taxation as harmful, and shift political attention toward enforcement rather than population-level public health measures.



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What the Evidence Shows

Independent research contradicts industry claims about illicit trade. The WHO Alcohol Tax Manual concludes that illicit markets are driven by governance quality, enforcement capacity, and tax administration, rather than tax levels. Strengthening enforcement while raising taxes is the evidence-based approach.

Earlier analyses of industry interference show that illicit-trade claims are often built on sensational media stories, unverified estimates and repeated messaging intended to create doubt and slow policy progress.

Studies further show that large-scale illicit trade in highly concentrated alcohol markets is unlikely without direct or indirect complicity of major companies, and that countries with adequate regulatory frameworks maintain higher taxes without significant illicit-market growth.



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HOW BIG ALCOHOL BUILDS ITS OWN EVIDENCE ON ILLICIT ALCOHOL – AND FLOODS THE DEBATE WITH IT

The most effective, evidence-based tool for preventing and reducing alcohol harm is the implementation of ambitious alcohol excise taxes.¹¹ Decades of independent, peer-reviewed research consistently show that when alcohol prices increase, consumption decreases, leading to a direct reduction in alcohol-attributable diseases, injuries, and deaths.

The World Health Organization identifies alcohol taxation as a “Best Buy” intervention—a highly cost-effective policy that not only improves public health but also generates vital domestic revenue for governments.¹²

However, the efficacy of this policy depends on its integrity. To protect their profits, the alcohol industry has developed a sophisticated infrastructure designed to challenge these facts by creating a “parallel universe” of evidence centred on the threat of illicit trade.

For more than a decade, the alcohol industry has relied on Euromonitor International to construct and circulate a narrative about illicit alcohol: that illicit markets are vast, expanding, and highly sensitive to any increase in alcohol



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taxes. This storyline has appeared consistently across regions and years. It resurfaces in every debate about alcohol taxation, and it is presented as authoritative global evidence even though it is based on industry-commissioned consultancy work.

A key Euromonitor publication reveals this relationship clearly. In **Size and Shape of the Global Illicit Alcohol Market** (2018), Euromonitor writes: “In the past seven years, SAB Miller and AB InBev have commissioned Euromonitor International to conduct research on illicit alcohol markets worldwide.”¹³

This confirms that Euromonitor’s illicit-alcohol research has been paid for by the world’s largest alcohol producer. It is not independent analysis. It is consultancy work developed to support the policy interests of the industry. Across those seven years, Euromonitor conducted illicit-alcohol studies in at

least 24 countries across Latin America, Africa, and Eastern Europe. These studies appear directly in the report’s own reference list, including country assessments in Malawi, Mexico, Chile, Paraguay, Russia, the Dominican Republic, and others. These individual country studies form the data reservoir from which the global industry extracts numbers, arguments, and alarmist narratives.

These Euromonitor findings are then repackaged and amplified across the global alcohol-industry ecosystem. TRACIT built its *Illicit Alcohol: A Global Study* entirely on Euromonitor’s commissioned data, turning country-level estimates into a global narrative of crisis.¹⁴ IARD reproduced the same dataset in its brochure *Alcohol in the Shadow Economy*, presenting industry-funded numbers as if they were independent global evidence.¹⁵ Front groups such as the World Spirits

Alliance and spiritsEUROPE embed these figures in lobbying toolkits and policy submissions, pushing dramatic claims into debates on taxation and availability.¹⁶ Through coordinated circulation across these networks, alcohol-industry numbers gain authority and visibility, appearing in media coverage, stakeholder consultations and political hearings as though they were neutral facts rather than lobbying tools.

The pattern continues at the national level. In South Africa, Kenya, Mexico, Uganda, Brazil, and Thailand, industry associations cite Euromonitor-derived numbers in press releases, parliamentary submissions, and media interviews.¹⁷ Local news outlets then repeat these claims uncritically, reinforcing the sense of an escalating “illicit alcohol crisis”^{18,19,20}

A defining feature of Euromonitor’s

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illicit-alcohol work is its absence of methodological transparency. The reports contain extensive numerical detail – market shares, consumption levels, fiscal losses, product categories – but no information about how these numbers were derived. No data sources are disclosed. No sampling or modelling methods are explained. Nothing can be checked, reproduced, or scrutinised. The precision is presented without the evidence base needed to validate it.

Despite this opacity, the reports make clear and unambiguous policy recommendations. Euromonitor repeatedly asserts that high excise taxes and “excessive restrictions” drive illicit markets and urges governments to “avoid overregulating licit alcohol.”²¹ These messages align closely with the lobbying positions of alcohol industry front groups like IARD, spiritsEUROPE, the World Spirits Alliance, and TRACIT.

Independent evidence paints a very different picture. WHO’s analyses show that unrecorded alcohol is a diverse category and that well-designed taxation does not automatically expand illicit consumption.²² Peer-reviewed modelling demonstrates that higher alcohol taxes, combined with targeted enforcement, can reduce both recorded and unrecorded consumption.²³

Meanwhile, evidence from tobacco-industry monitoring provides a clear warning. Independent research has shown that Euromonitor’s illicit-trade estimates in the tobacco sector suffer from major inconsistencies and methodological weaknesses. Blecher demonstrates that widely circulated illicit-trade figures are often based on opaque assumptions and cannot be independently verified.²⁴ Laverty and colleagues find that Euromonitor’s country-level estimates frequently

contradict government data and independent academic assessments, revealing substantial unreliability.²⁵

Gilmore et al. further document how Euromonitor’s work tends to echo tobacco-industry narratives, overstating the scale of illicit markets in ways that benefit industry lobbying positions.²⁶ Similar discrepancies have been documented in Ghana, where policy-oriented research found illicit-cigarette levels far below Euromonitor’s estimates. Researchers concluded that Euromonitor’s figures were not supported by market observations or enforcement records, reinforcing concerns about opaque methods and commercial bias.²⁷

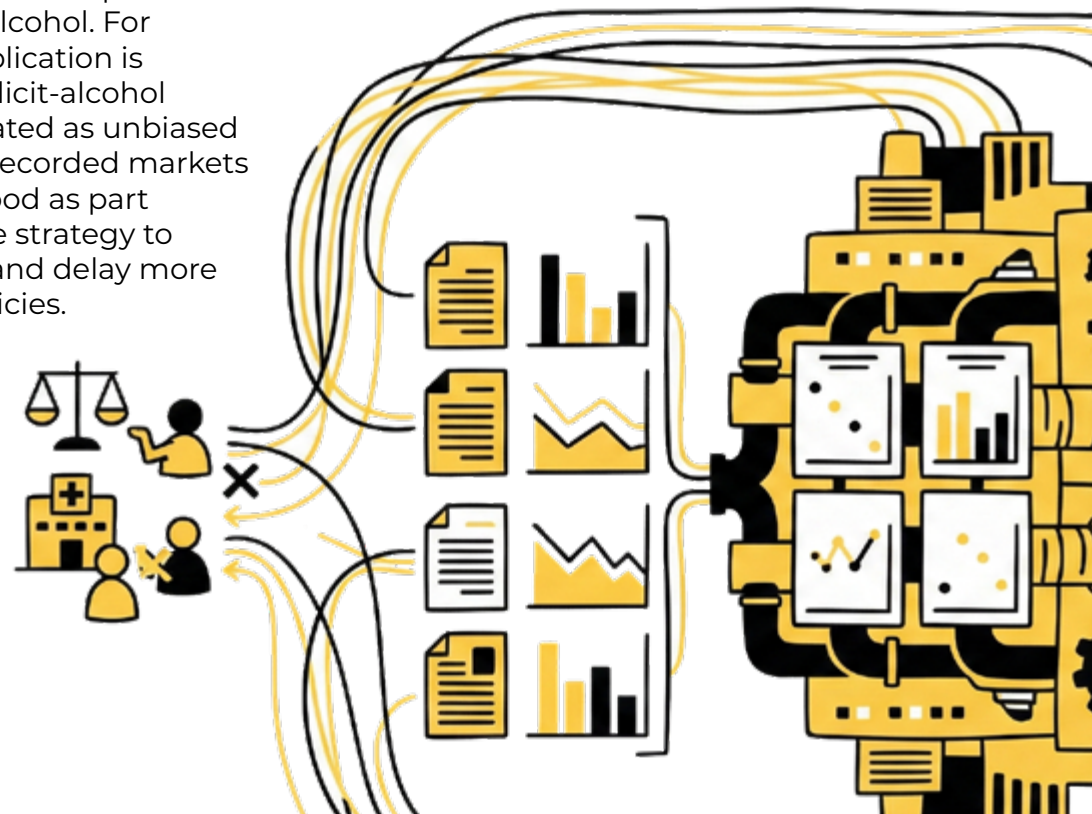
A Tobacco Control commentary highlights the core problem: Euromonitor’s business model relies on commercial contracts with transnational tobacco companies, raising direct conflicts of interest and

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undermining any claim to neutrality in estimating illicit markets.²⁸

These findings are directly relevant for alcohol policy. The same commercial structure, the same client relationships, and the same lack of methodological transparency underpin Euromonitor's illicit-alcohol reporting. The pattern revealed in the tobacco sector – consultancy products aligned with industry interests but presented as independent evidence – is replicated almost identically in alcohol. For policymakers, the implication is clear: Euromonitor's illicit-alcohol figures cannot be treated as unbiased measurements of unrecorded markets but must be understood as part of a broader corporate strategy to shape public debate and delay more ambitious alcohol policies. These findings are directly relevant for alcohol policy. The same commercial structure, the same client relationships,

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A Resurgent Tactic in 2025

In 2025, pro health-tax reforms moved up the political agenda in a growing number of countries. Governments faced rising pressure on health systems while national budgets struggled to keep pace. At the same time, external funding for health promotion has continued to decline, pushing governments to prioritise sustainable domestic financing. Together, these shifts have made alcohol taxation more widely recognised as a tool that can both relieve pressure on health systems and strengthen fiscal space.

In this context, alcohol-industry actors have revived or re-launched illicit-alcohol claims rooted in Euromonitor's narrative template. Old numbers are being presented as if they were new. Press statements warn that tax increases will “fuel illegal markets.” Media stories cite Euromonitor-style estimates without disclosing that the

original data were industry-funded and methodologically opaque. In several countries, the timing of these claims closely coincides with parliamentary hearings or tax-reform consultations. [20]

The strategic purpose is clear: to create doubt, hesitation, and fear around improved alcohol taxation – and to slow or weaken public health progress.

Euromonitor's illicit-alcohol studies occupy a central role in the alcohol industry's global strategy. They appear to offer neutral, international evidence. In practice, they are industry-commissioned consultancy products designed to shape policy outcomes. Their methodological opacity, industry-aligned framing, and global amplification have made them one of the most durable tools used to resist effective alcohol taxation.



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BUILT TO INTRUDE – BIG ALCOHOL'S INFILTRATION OF EVERYDAY PLATFORMS

Big Alcohol is not waiting for people to come to its products. The industry is reshaping the digital systems that structure everyday life so that alcohol use becomes ever-present, personalised and easy to act on. Streaming services, social media platforms and delivery apps have become the new infrastructure for alcohol promotion and distribution. They collect intimate data, predict vulnerabilities, and turn moments of boredom, stress or entertainment into opportunities for alcohol sales.

This is a strategic use of the platforms people rely on to relax, connect and organise their daily routines. Through global partnerships with entertainment companies, deep integration with social media's surveillance and targeting systems, and ultra-fast delivery logistics, Big Alcohol embeds its presence into digital environments in ways that bypass public health safeguards and expand the moments when alcohol can be promoted and accessed.

The result is a digital landscape designed around constant exposure, tailored prompts and on-demand access – conditions that undermine efforts to prevent and reduce alcohol harm and disproportionately affect young people and those already at risk.



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Beer Marketing by Stealth – Ambev Turns Netflix Shows into Marketing

Streaming platforms increasingly shape how people relax, connect and spend their free time. Alcohol companies are moving directly into these environments. The cooperation between AB InBev and Netflix shows how entertainment content is being repurposed as a vehicle for alcohol marketing in ways that blur the boundary between entertainment and commercial promotion.²⁹

AB InBev's agreement with Netflix allows its brands to link themselves to specific titles through co-marketing activities and "title integrations," tying alcohol promotion to the visibility and cultural reach of selected shows. In Brazil, Ambev has already produced themed promotional material, behind-the-scenes formats and influencer tie-ins around Netflix productions. These materials circulate through social media and fan communities and appear as extensions of the entertainment ecosystem rather than traditional advertising, making the marketing harder for viewers to recognise and scrutinise.

Streaming environments are especially valuable for this strategy. People watch for extended periods, often in



relaxed settings where leisure cues are influential. By building alcohol-friendly messaging into the cultural ecosystems surrounding popular shows, the AB InBev–Netflix model reinforces alcohol use as part of shared viewing rituals and fandom culture.

The result is a streaming environment where alcohol cues become part of the broader cultural experience around a series or film. Alcohol promotion is tied to the themes, visibility and online cultures of specific titles through co-marketing, social-media tie-ins and supplementary promotional content. These cues circulate through commentary, influencer outputs and branded spin-offs, broadening exposure – especially for younger audiences – and multiplying the contexts in which alcohol use is framed as enjoyable, social and desirable.

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Using Personal Data to Amplify Alcohol Marketing

Social media plays a central role in how people stay connected, follow culture and organise everyday life. These platforms are designed to keep users engaged and to personalise the content they see. The same systems that make social media feel relevant and entertaining also create powerful opportunities for alcohol companies to target people in ways that are far less visible than traditional advertising.

This data infrastructure is vast. By the age of 13, advertising technology companies have collected more than 72 million data points on each child, forming detailed profiles that fuel targeted marketing systems.³⁰ Alcohol companies also upload their own customer data into these systems, enabling platforms like Meta to identify and target people with personalised alcohol marketing.

People experiencing high-risk alcohol use are often targeted more intensely because predictive models classify them as high-value customers. Research shows that personalised alcohol marketing can trigger cravings and make it harder for people to decrease their alcohol

use or recover.

Studies have also found that social media platforms classify many minors as “interested in alcohol” based on their online behaviour, which allows alcohol ads to be shown to them even when safeguards are claimed to be in place. Evidence from multiple countries shows that exposure to digital alcohol marketing increases the likelihood that young people will start using alcohol earlier and use alcohol at high-risk levels.³¹

Industry practices in Uganda show how alcohol companies use social media to shape narratives and create online environments where alcohol harm is minimised or ignored. Corporate messages dominate feeds, portraying alcohol use as normal, aspirational and socially expected.³²



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Hyper-Availability by Design

Delivery apps have become part of the basic digital infrastructure many people use every day. They shape how food, groceries and other products move through communities. Alcohol companies are using these platforms to insert alcohol into these everyday systems and make alcohol access easier than ever.

In Brazil, AB InBev's subsidiary Ambev has taken this further by introducing a model that delivers alcohol in as little as 15 minutes.³³

The model relies on small local warehouses – so-called dark stores that are not open to the public – along with fast delivery routes and data systems that predict when and where people are most likely to order alcohol. Apps fill users' screens with constant promotions, discounts and reminders. Alcohol can now arrive at almost any time, including moments linked to stress, celebration or social gatherings. This removes many of the natural pauses that once limited impulsive alcohol use.

Public health experts in Brazil and elsewhere have raised concerns. Ultra-fast delivery increases the risk of high-risk alcohol use and makes it easier for minors to access alcohol, as meaningful age checks are difficult in a system built

around speed. Community groups also warn that normalising near-instant alcohol delivery undermines local efforts to maintain protective norms.

This development fits into a wider pattern. AB InBev's global strategy aims to grow by increasing alcohol availability and reaching people more often through new retail formats and digital channels.³⁴ Delivery platforms are central to this shift because they integrate alcohol access directly into the apps people already rely on.



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A New Infrastructure for Alcohol Marketing

Taken together, these examples show how alcohol companies are embedding themselves into the digital systems people rely on every day. These platforms were not created for alcohol promotion, but they now serve as powerful channels for increasing visibility, shaping perceptions and expanding access.

This creates a digital environment where alcohol marketing and easy access to alcohol become part of daily routines. People encounter promotional cues while watching shows, scrolling through social media or opening an app to order food. These cues reinforce each other. A promotion linked to a Netflix title can appear again in someone's social feed, where the same alcohol company markets directly through personalised content. If the company also operates its own delivery service, the app is only one tap away, ready to fulfil the purchase within minutes. This creates an integrated chain in which streaming cues, social media targeting and rapid delivery reinforce each other and shorten the distance between exposure and alcohol use.

This integrated system matters for public health. It increases the number of contexts in which alcohol is

marketed and sold, expands the moments in which people are encouraged to use alcohol and makes efforts to prevent and reduce alcohol harm more challenging. By moving into the platforms that structure everyday life, the alcohol industry reaches people in ways that are less visible and more difficult to address.



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RESPONSIBILITY ILLUSION: THE INDUSTRY'S GLOBAL 'MODERATION' CAMPAIGN

Across markets, the alcohol industry promotes a narrative of personal responsibility that appears constructive but shifts attention away from the commercial practices that drive alcohol harm. By emphasising “moderation” and individual behaviour, companies divert attention from the measures that actually prevent and reduce alcohol harm – especially alcohol taxation, advertising bans, and limits on availability. The evidence documented in 2025 shows how this narrative functions as a strategic tool to protect commercial interests while appearing supportive of public health.



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Responsibility messaging works for the industry – not for public health

A comprehensive review of responsibility initiatives finds no indication that such campaigns prevent and reduce alcohol harm. Instead, they function as reputation management tools that reinforce behavioural explanations, omit accurate risk information, and avoid addressing the commercial factors shaping alcohol use.³⁵ Their purpose is to influence perception rather than reduce harm.

This evidence provides important context for understanding the responsibility messaging documented by Big Alcohol Exposed in 2025. The industry promotes moderation as a behavioural solution even though research shows that such messaging does not change outcomes.



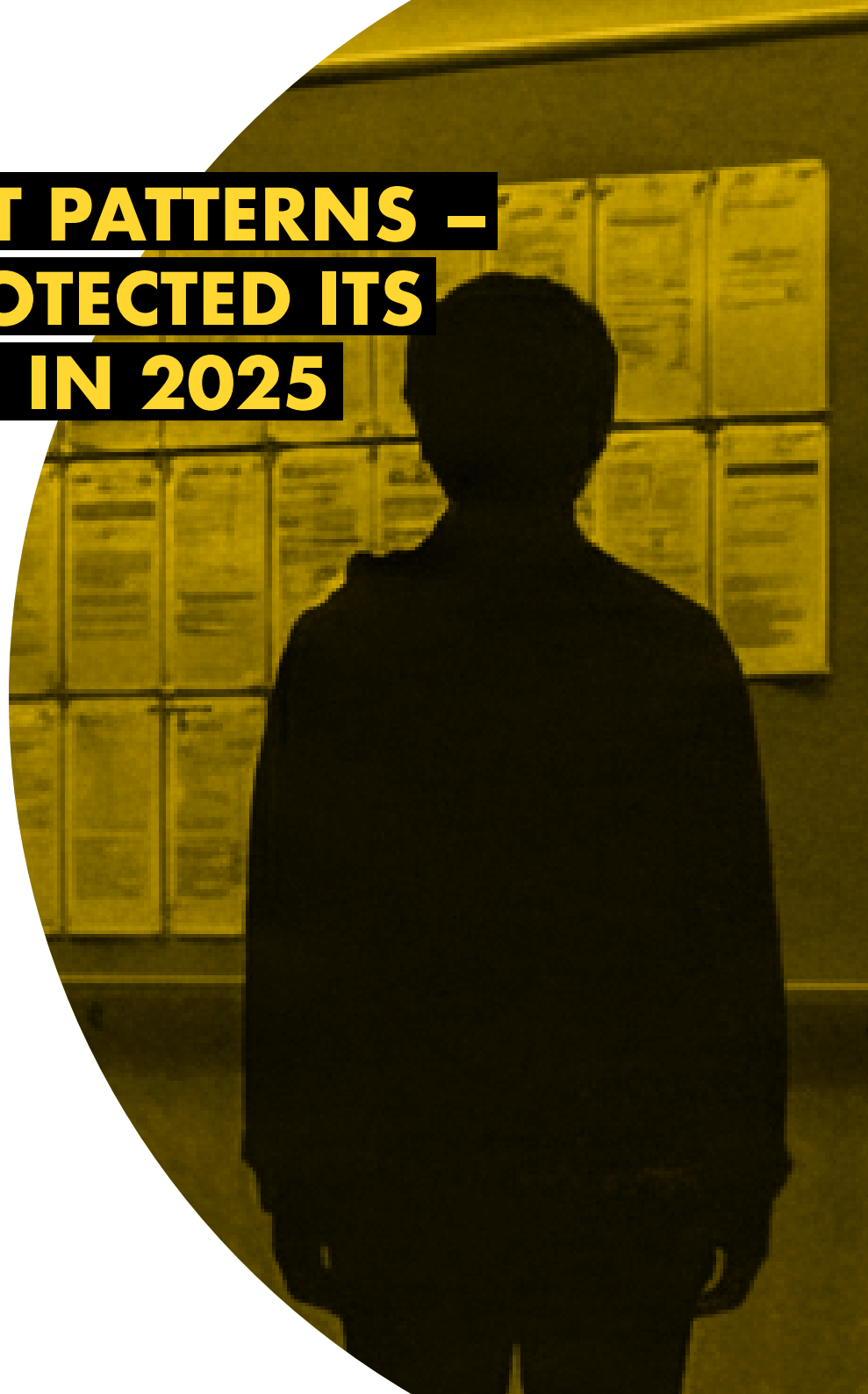
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Turning alcohol harm into an issue of personal responsibility alone

The moderation message is deliberately vague. It rarely defines what moderation means, how risks should be understood, or how industry practices influence alcohol use. Instead, it frames harm as the result of individual choices. This obscures commercial determinants and the industry's dependence on high-risk alcohol use for profits.³⁶

In Uganda, responsibility messaging featured prominently in a multinational producer's communication. The company presented itself as a champion of "responsible alcohol use" through campaigns and public messaging. At the same time, it expanded promotional activities and worked to secure a favourable market environment.³⁷ The moderation message created the appearance of care, while commercial behaviour moved in the opposite direction.

A clearer contradiction emerged when Premier Distilleries launched a promotional lottery requiring customers to buy more alcohol to win prizes. The campaign operated under the cover of responsibility messaging, which continued to appear alongside it and helped mask practices designed to increase alcohol use.³⁸ This combination of behavioural rhetoric and sales-driven promotion exemplifies how the responsibility illusion works: harm is framed as a matter of individual failure, while marketing systems deliberately encourage increased use.



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Coalitions and digital environments reinforcing the narrative

The same framing appears in alliances that present themselves as neutral or public interest actors. In Mexico, the newly launched Moderate Consumption Alliance positioned itself as promoting healthier behaviour. In practice, it promoted “moderation” while steering attention away from effective measures such as alcohol taxation, availability limits, and protections against marketing. It echoed industry talking points about individual responsibility, downplayed structural drivers of harm, and provided producers with a platform to appear as credible health communicators.³⁹ These activities created an impression of neutrality while reinforcing the industry’s preferred narrative.

Digital marketing intensifies the reach of responsibility messaging. Moderation language appears within lifestyle branding, influencer collaborations, and targeted social media content. Responsibility is linked to ideas of success, relaxation, and self-care, normalising alcohol use and implying that responsible individuals can integrate alcohol into daily life. Meanwhile, companies use targeted promotion to reach people at moments and in contexts that encourage increased use. Moderation rhetoric does not restrict these practices; it legitimises them.



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A global strategy with clear objectives

The cases documented in 2025 illustrate how responsibility messaging forms part of a coordinated global strategy. Whether implemented through corporate initiatives, alliances presented as public interest actors, or digital marketing systems, the effect is consistent: responsibility is shifted away from the industry and onto individuals. This helps maintain a favourable public image, positions producers as credible health communicators, and weakens momentum for more ambitious alcohol policies. It also enables companies to oppose measures such as alcohol taxation, availability limits, and protections against marketing while presenting themselves as partners in preventing and reducing alcohol harm. The consistency of this framing across regions shows that it is not a series of isolated campaigns, but a deliberate approach embedded in global industry strategy.

A shortcoming of this narrative is that it becomes embedded in the wider communication environment. As people are encouraged to see alcohol harm primarily as a matter of individual responsibility, it becomes harder for governments to build support for evidence-based measures that address affordability, availability, and marketing. This strengthens the industry's position and undermines efforts to prevent and reduce alcohol harm.



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5. THE DUBIOUS FIVE IN 2025



5. THE DUBIOUS FIVE IN 2025

The Dubious Five is a framework developed by Big Alcohol Exposed to help make sense of the wide range of alcohol industry misconduct documented over time. It groups alcohol industry practices into five categories – manipulation, deception, political interference, promotion, and sabotage – to provide a clear structure for understanding how commercial interests are advanced at the expense of public health and community wellbeing.

Big Alcohol Exposed regularly exposes specific companies, front groups, campaigns, policy interventions, and corporate practices as they occur. This chapter uses the Dubious Five to step back from individual cases and examine what they reveal collectively. Its purpose is to identify recurring strategies, common narratives, and shared modes of operation, and to show how these practices work together to undermine efforts to prevent and reduce alcohol harm. All documented cases are publicly available at bigalcohol.exposed.



5. THE DUBIOUS FIVE IN 2025

MANIPULATION

Big Alcohol spends significant effort reshaping how the problem itself is understood. Across the year, the material we documented shows consistent attempts to redefine alcohol harm as a matter of personal behaviour, education, or culture – not of commercial design or political choices.

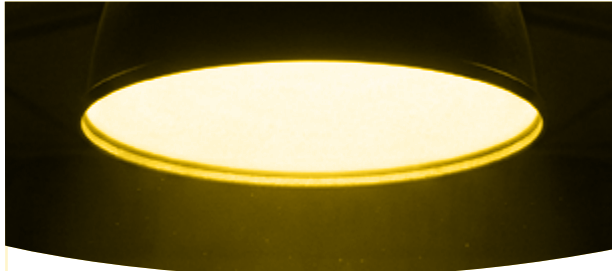
One dominant pattern is the systematic elevation of individual responsibility narratives. “Responsible use”, self-management, and lifestyle framing appear repeatedly as substitutes for structural solutions that actually prevent and reduce alcohol harm. These narratives might sound reasonable, but they quietly relocate responsibility away from alcohol producers and retailers – onto individuals navigating environments deliberately engineered to maximise alcohol use.

Another recurring alcohol industry tactic is the use of symbolic action to crowd out effective policy. Voluntary “rules”, self-defined information schemes, and campaign-style interventions are presented as meaningful progress, even when they are designed to remain invisible, optional, or cognitively weak. These measures actively delay public demand for real solutions to the problem.

Taken together, these practices shape the political and information environment long before legislation is debated. By narrowing the perceived range of “reasonable” solutions, manipulation strategies make more ambitious alcohol policies appear excessive or unnecessary, even as alcohol harm remains widespread and persistent.



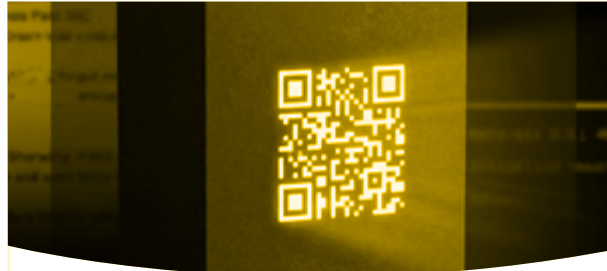
5. THE DUBIOUS FIVE IN 2025



Big Alcohol's Global 'Responsible Drinking' Drive – A Coordinated Distraction

Framed as a commitment to public health, the global “responsible use” agenda instead operates as a carefully coordinated narrative strategy. This case shows how responsibility messaging is used to shift attention away from the commercial drivers of alcohol harm and toward individual behaviour, narrowing the policy debate and weakening support for measures that prevent and reduce alcohol harm.

<https://bigalcohol.exposed/big-alcohols-global-responsible-drinking-drive-a-coordinated-distraction/>



Fake Transparency – Pernod Ricard's QR Code Labels Keep Consumers in the Dark

Pernod Ricard presents QR codes as a modern transparency solution, but this example shows how digital labels function as a substitute for visible, effective risk communication. By moving information off the package and behind optional steps, the company avoids meaningful disclosure while claiming progress – delaying pressure for mandatory warning labels.

<https://bigalcohol.exposed/fake-transparency-pernod-ricards-qr-code-labels-keep-consumers-in-the-dark/>



Ambev's Karaoke Cure – When Songs Replace Real Public Health Solutions

This case illustrates how entertainment and spectacle are used to reframe alcohol harm as a cultural issue rather than a policy challenge. By promoting music and participation as “solutions,” Ambev diverts attention from the structural factors shaping alcohol use and from the measures that could actually prevent and reduce alcohol harm.

<https://bigalcohol.exposed/ambev-karaoke-cure-when-songs-replace-real-public-health-solutions/>

5. THE DUBIOUS FIVE IN 2025

DECEPTION

A different but closely related pattern appears in how Big Alcohol communicates about risk and evidence. Here, the objective is not to deny alcohol harm outright, but to blur it – introducing ambiguity, selective interpretation, and reassuring narratives that reduce urgency for policy action.

One clear trend is the strategic amplification of uncertainty. Cancer risk, mental health impacts, and population-level harm are discussed using language that stresses complexity while avoiding clarity. This approach mirrors well-documented tactics from other harmful product industries – acknowledge concern in principle but undermine confidence in the conclusions that matter for policy.

Another form of deception lies in how positive developments are repurposed. Declines in youth alcohol use are repeatedly framed as proof that voluntary industry action works, rather than as an argument for protecting and extending the conditions that made those declines possible. In this way, public health progress is converted into a rationale for inaction.

We also documented repeated cases where alcohol brands and executives adopt mental health language to soften the image of alcohol use itself. These narratives rely on emotional resonance rather than evidence, presenting alcohol as compatible with – or even supportive of – wellbeing, despite strong evidence of the opposite. Deception works precisely because it does not look extreme. The messages often sound cautious, balanced, and reasonable. But their cumulative effect is to pollute the public discourse, undermine risk perception and harm recognition, normalise alcohol use, and weaken public support for the measures that could most effectively prevent and reduce alcohol harm.



5. THE DUBIOUS FIVE IN 2025



Heineken CEO Pushes Misleading Mental Health Claims to Sell More Beer

In this example, senior corporate leadership adopts the language of mental health to portray alcohol as compatible with wellbeing. The case shows how emotional and authoritative messaging is used to soften perceptions of risk, despite strong evidence linking alcohol use to poorer mental health outcomes.

<https://bigalcohol.exposed/heineken-ceo-pushes-misleading-mental-health-claims-to-sell-more-beer/>



Big Alcohol's Cancer Denial – Diageo and Others Spread Uncertainty

This case documents how major producers communicate about alcohol and cancer risk in ways that emphasise ambiguity and complexity. Rather than providing clear risk information, companies selectively frame the evidence to reduce urgency and blunt support for policies that would protect public health.

<https://bigalcohol.exposed/big-alcohols-cancer-denial-diageo-and-others-are-spreading-uncertainty/>



IARD Exploits Decline in Youth Alcohol Use to Reinforce Industry Narratives

Positive trends in youth alcohol use are reframed here as proof that voluntary action is sufficient. This example shows how progress driven by broader social and policy factors is repurposed to argue against more ambitious alcohol policies, turning success into justification for inaction.

<https://bigalcohol.exposed/iard-exploits-decline-in-youth-alcohol-use-to-reinforce-industry-narratives/>

5. THE DUBIOUS FIVE IN 2025

POLITICAL INTERFERENCE

When policy processes move closer to decisions that could affect alcohol sales and profits, Big Alcohol's engagement becomes more direct. The cases documented this year show political interference aimed both at blocking policy outright as well as reshaping its scope and ambition.

Economic claims play a central role. Hospitality, jobs, and recovery are repeatedly invoked to create urgency and political pressure, while the far larger health, social and economic costs of alcohol harm are sidelined. These narratives are especially effective in periods of economic uncertainty, when short-term growth is prioritised over long-term wellbeing.

Another recurring strategy is to frame proposals that roll back public health protections in alcohol policy as “reform”. Measures that would increase availability, extend sales hours, make alcohol more affordable and alcohol marketing more present in everyday life are framed as “modernisation” or economic necessity, even though their public health harm are well known. The language of reform is used to obscure outcomes that undermine population health.

The systematic positioning of industry actors as legitimate policy stakeholders is another strategy identified during 2025. Through consultations and advisory roles, commercial interests gain access to decision-making spaces where conflict-of-interest safeguards should apply. This influence often results in diluted alignment with best-practice public health recommendations and slower progress on effective alcohol policy solutions.

Political interference does not always leave a single clear fingerprint. Instead, it accumulates – narrowing policy debates, delaying decisions, and ensuring that the public interest remains secondary to commercial profit maximization interests.



5. THE DUBIOUS FIVE IN 2025



Industry-Sponsored “Reform” Would Make Alcohol Cheaper and More Accessible

Presented as sensible modernisation, this policy proposal would in practice increase affordability and availability. The case shows how reform language is used to mask outcomes that undermine prevention goals and increase alcohol harm, while positioning industry interests as aligned with the public good.

<https://bigalcohol.exposed/industry-sponsored-reform-would-make-alcohol-cheaper-and-more-accessible/>



Big Alcohol Captures Health Policy in New Zealand – WHO Action Undermined

This example documents how industry influence within policy processes weakened alignment with WHO recommendations. It illustrates how access, consultation, and behind-the-scenes engagement can dilute public health ambition without overt opposition.

<https://bigalcohol.exposed/big-alcohol-captures-health-policy-in-new-zealand-who-action-undermined/>



Asobares Pushes for Expanded Alcohol Sales Hours in Colombia

Here, an industry group lobbies for longer sales hours using economic arguments centred on hospitality and recovery. The case shows how availability-expanding measures are framed as necessity, while risks to safety, health, and communities are marginalised.

<https://bigalcohol.exposed/alcohol-industry-group-asobares-pushes-for-expanded-alcohol-sales-hours-in-colombia/>

5. THE DUBIOUS FIVE IN 2025

PROMOTION

The alcohol industry promotion cases documented in 2025 show how Big Alcohol invests in systems that make alcohol ever-present, frictionless, and socially embedded.

Rapid delivery platforms are a defining feature. By integrating alcohol into the same services used for food and other everyday needs, companies dramatically shorten the distance between purchase and consumption. This expansion of availability saturates communities with even more alcohol and directly undermines efforts to prevent and reduce alcohol harm.

Promotion is also increasingly designed to evade advertising scrutiny by being routed through entertainment and cultural channels. Entertainment partnerships, brand integrations, and cultural tie-ins allow alcohol marketing to operate below the threshold of conventional advertising oversight. These strategies are particularly effective in reaching younger audiences while remaining difficult to address through existing policy frameworks.

Wellness framing has become part of promotion itself. Our monitoring shows that alcohol is increasingly marketed as compatible with self-care, balance, and relaxation, borrowing credibility from health discourse while obscuring risk. These reframing promotes alcohol use and weakens risk perception.

Together, these practices show promotion functioning as environmental design – shaping contexts so that alcohol use becomes normal, convenient, and hard to avoid.



5. THE DUBIOUS FIVE IN 2025



Fifteen Minutes to Harm – AB InBev’s Delivery App Fuels Instant Alcohol Access

This case shows how rapid delivery infrastructure transforms alcohol into an on-demand commodity. By collapsing the time between impulse and purchase, delivery apps expand availability and undermine efforts to prevent and reduce alcohol harm in everyday settings.

<https://bigalcohol.exposed/fifteen-minutes-to-harm-ab-inbevs-new-delivery-app-fuels-instant-alcohol-access/>



Beer Marketing by Stealth – Ambev Turns Netflix’s “Senna” Into a Commercial Funnel

Entertainment partnerships allow alcohol brands to embed themselves into popular culture without the visibility of traditional advertising. This example demonstrates how promotion can operate through narrative and association, bypassing safeguards while shaping attitudes and norms.

<https://bigalcohol.exposed/beer-marketing-by-stealth-ambev-turns-netflixs-senna-into-a-commercial-funnel/>



Brown-Forman Markets Whiskey as Self-Care

By borrowing the language of self-care and balance, this campaign reframes alcohol use as a wellness practice. The case shows how promotional strategies draw legitimacy from health discourse while obscuring risk and normalising alcohol use.

<https://bigalcohol.exposed/brown%e2%80%91forman-markets-whiskey-as-self-care-to-boost-sales/>

5. THE DUBIOUS FIVE IN 2025

SABOTAGE

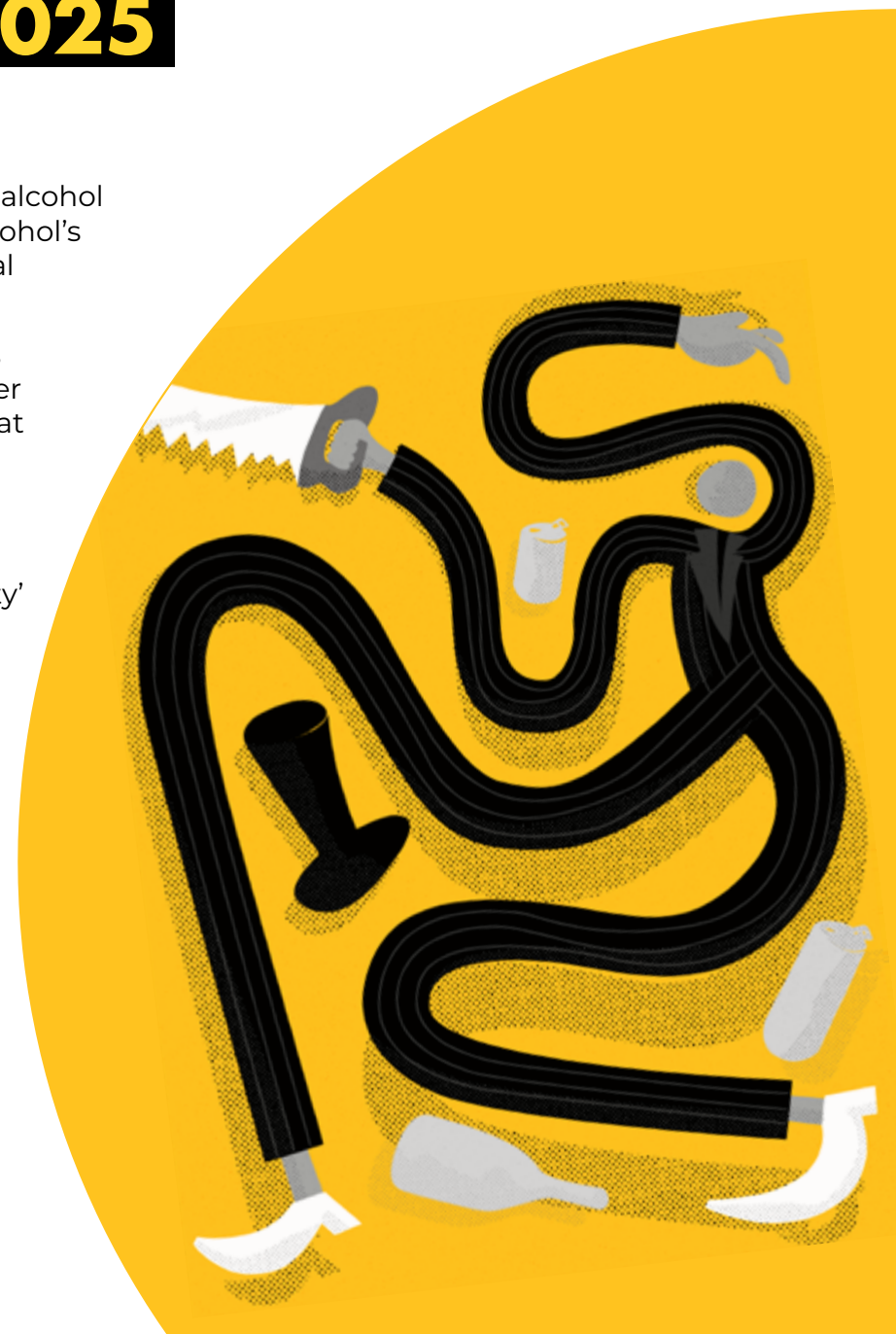
Some of the clearest evidence of harm comes from the material impacts of alcohol production itself. The cases documented under sabotage show how Big Alcohol's operations can directly undermine communities, labour rights, and essential resources.

Water stress is a recurring theme. Large-scale breweries and bottling plants often operate in regions already facing scarcity, intensifying competition over water resources while relying on abstract claims of 'balance' or neutrality that conflict with well documented local water shortages. Our monitoring in 2025 documented growing resistance from local communities, including protests and public opposition, as affected populations contested the social and environmental costs imposed on already constrained water systems. Corporate responses have typically taken the form of voluntary 'sustainability' initiatives, featuring broad claims about water stewardship, efficiency, or safety. These initiatives are self-designed and self-reported, making them largely impossible for communities, regulators, or independent actors to verify, and leaving underlying water risks and power imbalances unaddressed.

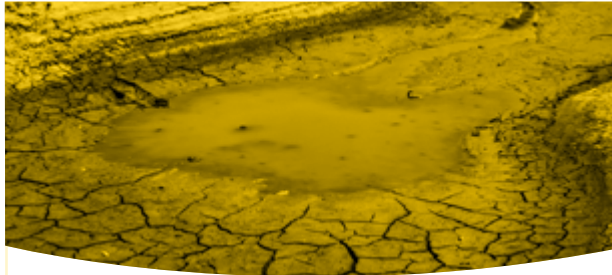
Labour exploitation is another persistent pattern. Investigations reveal how supply chains can depend on severe abuses, including conditions described as analogous to forced labour. These cases expose the gap between corporate responsibility narratives and lived realities.

What unites these examples is the externalisation of costs. Environmental damage, social conflict, and worker exploitation are treated as collateral issues, while profits are protected. When scrutiny arises, responses focus on reputation management rather than structural change.

Sabotage reveals the limits of voluntary responsibility – and the need for policy approaches that protect people, communities, and ecosystems from commercial harm.



5. THE DUBIOUS FIVE IN 2025



Heineken's Yucatán Brewery – A Threat to Water Security

This case examines how industrial expansion intersects with local water scarcity. It highlights the tension between corporate growth and community needs, and how claims of sustainability fail to reflect lived realities on the ground.

<https://bigalcohol.exposed/heinekens-yucatan-brewery-a-threat-to-water-security-and-community-rights/>



Beer Over People – How AB InBev Drains Mexico's Aquifers

Large-scale production can impose long-term environmental costs on surrounding communities. This example shows how groundwater extraction for beer production exacerbates water stress while impacts are externalised beyond company balance sheets.

<https://bigalcohol.exposed/beer-over-people-how-ab-inbev-drains-mexicos-aquifers/>



“Work Similar to Slavery” – Ambev Exploits Workers in Brazil

This case documents severe labour abuses within alcohol production chains. It exposes the gap between corporate responsibility narratives and actual working conditions, highlighting how commercial success can rest on exploitation.

<https://bigalcohol.exposed/work-similar-to-slavery-ambev-caught-exploiting-workers-in-brazil/>

6. STATE OF THE SCIENCE 2025: WHAT INDEPENDENT RESEARCH REVEALS ABOUT BIG ALCOHOL'S PLAYBOOK

6. STATE OF THE SCIENCE 2025: WHAT INDEPENDENT RESEARCH REVEALS ABOUT BIG ALCOHOL'S PLAYBOOK

Independent research continues to converge on a clear conclusion: alcohol corporations and their front groups operate as political actors. They shape policy agendas, market conditions, and information environments to protect profits, expand availability, and delay effective safeguards.

Alcohol companies and their front groups pursue profit by shaping what people believe about alcohol, how societies normalize alcohol, how policymakers interpret evidence, and how institutions make and enforce rules.

The 2025 evidence base strengthens understanding of how this power operates through five recurring strategies – political interference, promotion, manipulation, sabotage, and deception – while the commercial determinants of health lens clarifies how these strategies function as a coherent business model.

With this overview, we aim to:

- Clarify the evidence-base and shed light on what science knows about alcohol industry practices and their impact,
- Make latest independent research more widely known and available, and
- Contribute to an evidence-based public discourse about the harm the alcohol industry is causing, and effective policy solutions.



6. STATE OF THE SCIENCE 2025: WHAT INDEPENDENT RESEARCH REVEALS ABOUT BIG ALCOHOL'S PLAYBOOK

POLITICAL INTERFERENCE: CAPTURING DECISION- MAKERS AND DELAYING POLICY

Political interference research tracks how industry actors frame themselves as “partners” while pursuing outcomes that preserve sales and narrow regulation. Multiple studies from 2025 show how alcohol industry actors target policymakers and opinion leaders to dilute, derail, or delay policies that threaten alcohol companies’ sales and profit.

Research papers analyzing submissions, consultations, and legislative processes document consistent interference patterns: delay, dilution, derailment, and coalition splitting. Industry-linked actors normalize corporate participation in governance, reframe conflict of interest as a “supposed” concern, and recast alcohol policy action as economically harmful or politically unfeasible. Case studies based on transparency mechanisms show how alcohol industry access and influence operate in practice, converting public interest reform into prolonged uncertainty and policy stagnation.

Analyses of WHO and other consultation processes show predictable framings: alcohol companies, their lobbyists, and front groups redefine conflict of interest as a technicality, treat corporate participation as legitimate governance, and portray evidence-informed regulation as disproportionate, economically harmful, or politically unrealistic. Case studies of legislative processes demonstrate how access and procedural tactics convert alcohol policy initiatives into delay, dilution, and fragmentation.



6. STATE OF THE SCIENCE 2025: WHAT INDEPENDENT RESEARCH REVEALS ABOUT BIG ALCOHOL'S PLAYBOOK

Studies from 2025 relating to Big Alcohol's Political Interference strategy:

- Alcohol industry involvement in the delayed South Africa Draft Liquor Amendment Bill 2016: a case study based on freedom of information requests
<https://link.springer.com/article/10.1186/s12992-025-01097-5>
- Alcohol lobbying in Canada: a quantitative analysis of the federal registry of lobbyists
<https://pubmed.ncbi.nlm.nih.gov/40879083/>
- Alcohol Retail Lobbying: A comparative analysis of profit and not-for-profit alcohol retail peak body written submissions to Australian parliamentary inquiries
<https://pubmed.ncbi.nlm.nih.gov/40582336/>
- An analysis of framing mechanisms used in alcohol industry submissions to an Australian national parliamentary inquiry
<https://pubmed.ncbi.nlm.nih.gov/41429912/>
- Confronting alcohol's costly toll: why the European region needs clearer, evidence-based policy
[https://www.thelancet.com/journals/lanepi/article/PIIS2666-7762\(24\)00348-X/fulltext](https://www.thelancet.com/journals/lanepi/article/PIIS2666-7762(24)00348-X/fulltext)
- Constructing and contesting industry's role in multistakeholder governance: a qualitative analysis of responses to WHO consultations
<https://link.springer.com/article/10.1186/s12992-025-01159-8>

6. STATE OF THE SCIENCE 2025: WHAT INDEPENDENT RESEARCH REVEALS ABOUT BIG ALCOHOL'S PLAYBOOK

Studies from 2025 relating to Big Alcohol's Political Interference strategy:

- Double Measures: Conceptual Tensions and the Treatment of Evidence in Alcohol Policy
<https://philsci-archive.pitt.edu/25283/>
- Implementation of a multi-component alcohol policy in Ireland: A qualitative study exploring barriers and facilitators to implementation
<https://www.sciencedirect.com/science/article/pii/S0955395925001707>
- Labelling the debate: a thematic analysis of alcohol industry submissions to the EU consultation on alcohol health warnings in Ireland
<https://link.springer.com/article/10.1186/s12992-025-01126-3>
- Leveraging web-scraped data to examine alcohol pricing: an Australian feasibility study with retail data
<https://pubmed.ncbi.nlm.nih.gov/41421049/>
- Lobbying, transparency and trust: power imbalances and the failure to implement Europe's Beating Cancer Plan
[https://www.thelancet.com/journals/lanpe/article/PIIS2666-7762\(25\)00030-4/fulltext](https://www.thelancet.com/journals/lanpe/article/PIIS2666-7762(25)00030-4/fulltext)
- Measuring Interest Group Positions on Legislation: An AI-Driven Analysis of Lobbying Reports
<https://arxiv.org/pdf/2504.15333>

6. STATE OF THE SCIENCE 2025: WHAT INDEPENDENT RESEARCH REVEALS ABOUT BIG ALCOHOL'S PLAYBOOK

Studies from 2025 relating to Big Alcohol's Political Interference strategy:

- Proposed changes to alcohol licensing should make us question whose interests we're serving in the name of growth
<https://www.bmj.com/content/391/bmj.r2369.full>
- Scientification of politics or politicisation of science? Parliamentary committee hearings on the Finnish alcohol policy reforms in 1994 and 2017 as epistemic work
<https://journals.sagepub.com/doi/full/10.1177/00016993251322875>
- The (Un)making of NCD policy in Botswana: actor mobilisation, inertia, and fragmentation
<https://researchonline.lshtm.ac.uk/id/eprint/4675360/>
- Untangling the complex web of alcohol policy needs and potential solutions in Brazil: evidence from civil society and political stakeholders
<https://pubmed.ncbi.nlm.nih.gov/41410029/>
- 'Alcohol Causes Cancer': Objections to an Irish Labelling Law Reopen Old Debates About Trade and Non-Trade Issues and New Debates About Interaction of WTO and EU Law
https://link.springer.com/chapter/10.1007/8165_2024_128
- Real-World Application of Unhealthy Commodity Industries' Corporate Political Activity Research
Comment on "Corporate Political Activity: Taxonomies and Model of Corporate Influence on Public Policy"
<https://pubmed.ncbi.nlm.nih.gov/40767213/>
- Why addressing conflicts of interest is essential to progress in reducing commercially driven health harms: Lessons from tobacco
<https://pubmed.ncbi.nlm.nih.gov/40692627/>
- When Political Influence Loses Value: Import Competition and Investment in Corporate Lobbying
https://papers.ssrn.com/sol3/papers.cfm?abstract_id=4852251

6. STATE OF THE SCIENCE 2025: WHAT INDEPENDENT RESEARCH REVEALS ABOUT BIG ALCOHOL'S PLAYBOOK

PROMOTION: PERPETUATING THE ALCOHOL NORM THROUGH EVOLVING MARKETING SYSTEMS

The 2025 evidence continues to show that alcohol marketing is a system for driving up alcohol availability and acceptability – placing alcohol at the center of cultural practices, social meaning, and consumer preferences.

In 2025, independent peer-reviewed studies have documented how digital environments, sponsorship ecosystems, influencers, and platform design sustain exposure and engagement, including among adolescents. Research on no/low-alcohol branding and “alibi” sponsorship shows how brand presence persists even where direct advertising is not allowed.

The public-interest implication remains consistent: Comprehensive protections against alcohol advertising, sponsorship, and promotion exposure require closing indirect marketing loopholes and regulating platform-specific mechanics such as targeting and age verification.



6. STATE OF THE SCIENCE 2025: WHAT INDEPENDENT RESEARCH REVEALS ABOUT BIG ALCOHOL'S PLAYBOOK

Studies from 2025 relating to Big Alcohol's Promotion strategy:

- Adolescent Exposure to Food and Alcohol Advertising on TV in the U.S., 2013-2022
<https://pubmed.ncbi.nlm.nih.gov/41209335/>
- Age verification and underage accessibility of official alcohol companies' websites and brand pages on Facebook and Instagram
<https://www.sciencedirect.com/science/article/abs/pii/S0955395924003736>
- Alcohol Advertising at the Beach: Insights From Young People in Western Australia
<https://onlinelibrary.wiley.com/doi/abs/10.1002/hpja.70129>
- Alcohol marketing as a commercial determinant of health: daily diary insights from young women in Kampala
<https://academic.oup.com/heapro/article/40/1/daaf002/8002179>
- Alcohol sports sponsorship in Uganda: A case study analysis
<https://ijadr.org/index.php/ijadr/article/view/557>
- Alcohol-Related Content Delivered Through TikTok's Search Function: A Content Analysis of Top Videos Across Popular Alcohol Terms
<https://www.jsad.com/doi/abs/10.15288/jsad.24-00308>
- Beyond the game: alcohol brand experiences in sport and the potential for harm
<https://www.tandfonline.com/doi/full/10.1080/0267257X.2025.2556881>
- Current and future trends in the consumption, sale and purchasing of alcohol-free and low-alcohol products in Great Britain, 2014 to 2023
<https://onlinelibrary.wiley.com/doi/full/10.1111/add.70041>

6. STATE OF THE SCIENCE 2025: WHAT INDEPENDENT RESEARCH REVEALS ABOUT BIG ALCOHOL'S PLAYBOOK

Studies from 2025 relating to Big Alcohol's Promotion strategy:

- The Dark Side of Social Media Influencers: A Research Agenda for Analysing Deceptive Practices and Regulatory Challenges
<https://onlinelibrary.wiley.com/doi/full/10.1002/mar.22173>
- Exploring links—exposure to alcohol adverts on social media in relation to alcohol use among university students in Uganda
<https://academic.oup.com/alcalc/article/60/1/aga081/7915222>
- Gen-Z online purchase intention of 0.0% alcohol beverages in Malaysia: a stimulus-organism-response perspective
<https://www.emerald.com/jima/article-abstract/16/11/3173/1257216/Gen-Z-online-purchase-intention-of-0-0-alcohol?redirectedFrom=fulltext>
- New immersive alcohol marketing and commerce in metaverse environments
<https://onlinelibrary.wiley.com/doi/full/10.1111/dar.13967>
- In the arena of debate: a systematic literature review on sports sponsorship by controversial industries
<https://www.emerald.com/ijmsms/article-abstract/26/1/204/1243804/In-the-arena-of-debate-a-systematic-literature?redirectedFrom=fulltext>
- Mapping corporate sponsorship of alcohol and gambling associations: An Australian pilot study
<https://onlinelibrary.wiley.com/doi/full/10.1111/add.16775>
- Place attachment and home drinking: a qualitative study and research agenda
<https://www.tandfonline.com/doi/full/10.1080/0267257X.2025.2496418#abstract>
- Impact Assessment as Agenda-Setting: Procedural Politicking and the Mobilization of Bias in the European Union's Audiovisual Media Services Directive
<https://onlinelibrary.wiley.com/doi/full/10.1111/rego.70016>

6. STATE OF THE SCIENCE 2025: WHAT INDEPENDENT RESEARCH REVEALS ABOUT BIG ALCOHOL'S PLAYBOOK

Studies from 2025 relating to Big Alcohol's Promotion strategy:

- Prioritising research on marketing and consumption of No and Low (NoLo) alcoholic beverages in Ireland
<https://pubmed.ncbi.nlm.nih.gov/40184695/>
- Qatar 2022: FIFA's Adjustments for the First (Men's) World Cup in an Arab and Muslim Nation
https://link.springer.com/chapter/10.1007/978-981-97-8414-1_18
- Recent policy recommendations won't protect young people from alcohol-related content on social media: what needs to change?
<https://pubmed.ncbi.nlm.nih.gov/39832293/>
- Targeting youth? Alcohol in colorful fruit pouches - a case study from Poland
<https://pubmed.ncbi.nlm.nih.gov/41418692/>
- Where are the alcohol advertising hotspots near schools?
<https://onlinelibrary.wiley.com/doi/full/10.1002/hpja.896>
- Zero alcohol products and adolescents: A tool for harm reduction or a trojan horse?
<https://www.sciencedirect.com/science/article/pii/S0195666324003854>
- Zero-alcohol beverage aisle placement and social norms around alcohol: A cultural perspective from Aotearoa New Zealand
<https://www.tandfonline.com/doi/full/10.1080/07359683.2025.2504820>
- 'I just saw the alcohol brand, I never really thought of the zeros': Young people's views of NoLo and alibi alcohol sponsorship
<https://pubmed.ncbi.nlm.nih.gov/41391217/>

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Studies from 2025 relating to Big Alcohol's Promotion strategy:

- 'Zero-alcohol' products and the guise of responsibility
<https://pubmed.ncbi.nlm.nih.gov/41174179/>
- "A sporty, healthy twist?": interrogating the deployment of health and wellness discourses in No and Low alcohol (NoLo) marketing and consumer practices
<https://www.tandfonline.com/doi/abs/10.1080/0267257X.2025.2495339>
- "Carlsberg makes memorable advertisements (Mads Mikkelsen is handsome)": Discourses surrounding alcohol advertising in Sweden: A critical discourse analysis
<https://www.diva-portal.org/smash/record.jsf?pid=diva2%3A1977276&dswid=-5013>

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DECEPTION: OBSCURING HARM, DISTORTING RISK, CONFUSING SOLUTIONS

The research shows that alcohol industry actors and front groups fuel uncertainty and cognitive dissonance by polluting public understanding of alcohol harm and policy effectiveness. Scientific studies describing “pollution pathways” connect misinformation directly to preventable harms, supporting a core conclusion for the public discourse: misinformation is not a side effect – it is a Big Alcohol strategy.

Studies document misinformation pathways and misleading framings that blur cancer risk, pregnancy and infant health harms, and the scale of alcohol's second-hand harms.

Scientific evidence also tracks how language and “evidence standards” become contested terrain: industry-aligned narratives reframe effective policy as unnecessary, extreme, or misdirected.

The cumulative finding is clear: deception is a strategy aimed at hindering public recognition of harm and public support for evidence-informed alcohol policy solutions.



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Studies from 2025 relating to Big Alcohol's Deception strategy:

- Alcohol industry conflicts of interest: The pollution pathway from misinformation to alcohol harms
<https://www.sciencedirect.com/science/article/pii/S2514664525000499>
- Conflicts of interest in public health research and publications
<https://academic.oup.com/heapro/article/40/1/daaf009/8004923>
- Consumer perceptions of nutrition labeling on alcoholic beverages
<https://www.sciencedirect.com/science/article/abs/pii/S0950329325002198>
- The International Scientific Forum on Alcohol Research (ISFAR) critiques of alcohol research: Promoting health benefits and downplaying harms
<https://pubmed.ncbi.nlm.nih.gov/40632205/>
- Key Terms and Concepts in Alcohol Use and Problems: A Critical Evaluation
<https://journals.sagepub.com/doi/full/10.1177/29768357241312555>
- Labels warning about alcohol-attributable cancer risks should be mandated urgently
[https://www.thelancet.com/journals/lanpub/article/PIIS2468-2667\(25\)00040-4/fulltext](https://www.thelancet.com/journals/lanpub/article/PIIS2468-2667(25)00040-4/fulltext)
- Framing alcohol harm in the UN context – the importance of language
<https://link.springer.com/article/10.1186/s12992-025-01117-4>
- Framing van alcoholgebruik, gerelateerde (gezondheids) schade en preventiebeleid door belanghebbenden bij de alcoholindustrie. Welke argumenten worden voor en achter de schermen gebruikt?
https://www.gezondlevennetwerk.nl/local/userfiles/tools/Rapport_Framing_van_alcoholgebruik_gelateerde_gezondheids_schade_en_preventiebeleid_door_belanghebbenden_bij_de_alcoholindustrie_29082025.pdf

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Studies from 2025 relating to Big Alcohol's Deception strategy:

- The prevalence of mandated and voluntary health information on alcohol products in Australia
<https://www.sciencedirect.com/science/article/pii/S1326020024000918>
- An Examination of Public Concerns Relating to Combined Text and Graphic Alcohol Warning Labels: An all-Ireland Cross-Sectional Study
<https://riviste.unimi.it/index.php/ebph/article/view/29971>
- A chance for countries to support Ireland's world-leading cancer warning labels for alcohol containers
<https://onlinelibrary.wiley.com/doi/full/10.1111/dar.13977>

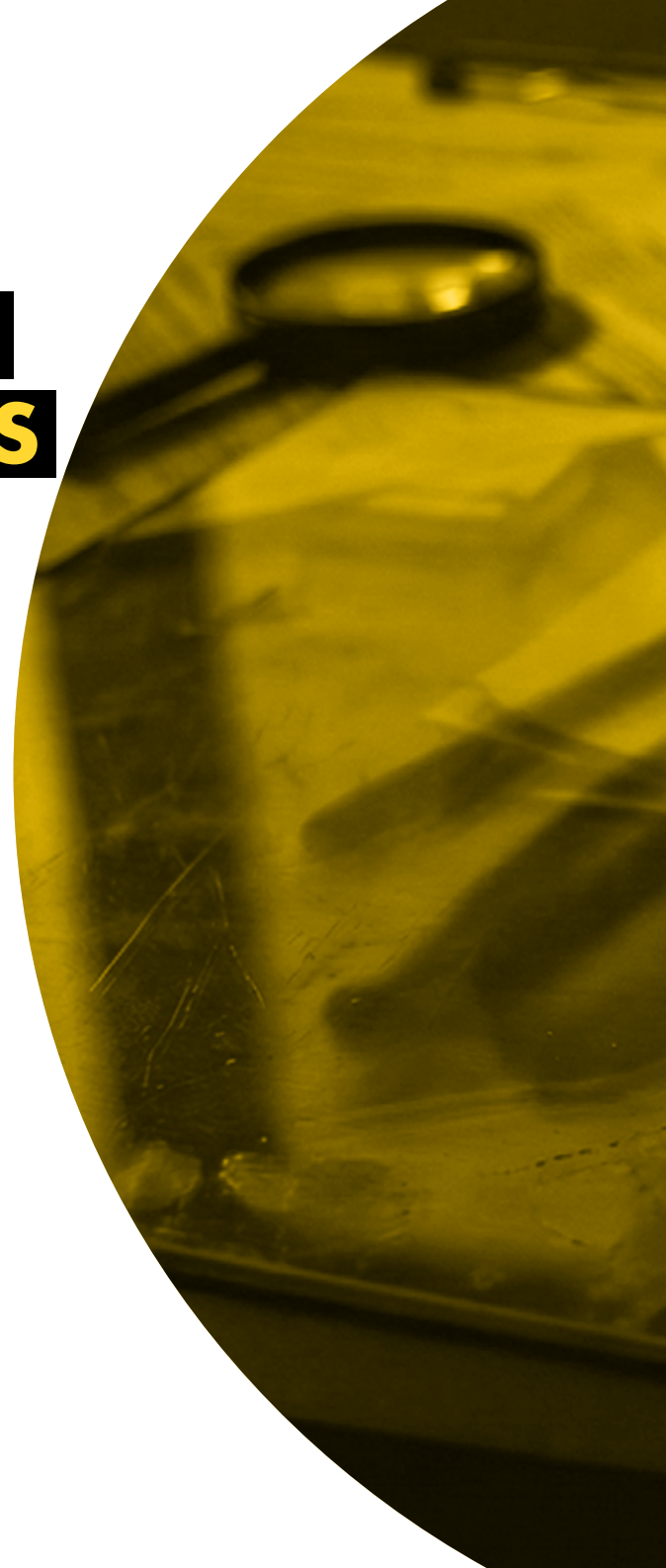
6. STATE OF THE SCIENCE 2025: WHAT INDEPENDENT RESEARCH REVEALS ABOUT BIG ALCOHOL'S PLAYBOOK

MANIPULATION: IMAGE CONTROL AND “GOOD CORPORATE CITIZEN” NARRATIVES

A smaller but important body of evidence maps how alcohol companies cultivate legitimacy and reduce political risk through Corporate Social Responsibility (CSR), “responsibility” narratives, health-and-wellness positioning, as well as reputation management. These activities protect brand value and corporate standing, presenting the company as a responsible partner while leaving sales-driving practices intact.

Latest evidence from studies published in 2025 maps how alcohol industry actors co-opt public health language to protect reputation and normalize access to decision-makers while maintaining sales-driving practices.

The research strengthens the case for clear conflict-of-interest safeguards and for treating CSR and partnership claims as political strategies that reduce regulatory risk and expand access to decision-makers.



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Studies from 2025 relating to Big Alcohol's Deception strategy:

- Alcohol industry corporate social responsibility as structural coupling: analysis of CSR communications from Polish alcohol producers
<https://www.tandfonline.com/doi/full/10.1080/09581596.2025.2516026>
- Corporate social responsibility as a commercial determinant of health: A case study of the alcohol industry in the Philippines
<https://pubmed.ncbi.nlm.nih.gov/40403589/>
- Women's views about the use of gendered Corporate Social Responsibility strategies by harmful industries
<https://pubmed.ncbi.nlm.nih.gov/41174700/>

6. STATE OF THE SCIENCE 2025: WHAT INDEPENDENT RESEARCH REVEALS ABOUT BIG ALCOHOL'S PLAYBOOK

SABOTAGE: OBSTRUCTING PUBLIC GOODS, UNDERMINING RULES AND INSTITUTIONS

The sabotage evidence base from 2025 is smaller, but strategically significant. Studies that expose regulatory obstruction, weak compliance practices, and institutional disruption show how Big Alcohol damages the functioning of protections designed to serve the public interest. Sabotage operates where corporate conduct undermines enforcement, weakens the practical effect of alcohol policy measures, and obstructs people's access to public goods.

Sabotage research highlights tactics that weaken policy capacity: manufacturing uncertainty, contesting evidence standards, deploying trade and legal threats, and mobilizing aligned voices to define the public interest around "growth" rather than wellbeing.

This category deserves elevated attention because it connects corporate practices directly to institutional failure and community harm, not only to policy debate.



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Studies from 2025 relating to Big Alcohol's Sabotage strategy:

- New Zealanders strongly support policies to curb alcohol harm – will government listen?
<https://www.phcc.org.nz/briefing/new-zealanders-strongly-support-policies-curb-alcohol-harm-will-government-listen>
- Suboptimal uptake and placement of a mandatory alcohol pregnancy warning label in Australia
<https://www.sciencedirect.com/science/article/pii/S0955395924003451>



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COMMERCIAL DETERMINANTS OF HEALTH: THE SYSTEM BEHIND THE STRATEGIES

Across these categories, the commercial determinants of health evidence clarifies what ties the Big Alcohol playbook together: alcohol industry strategies operate in concert to maintain affordability, expand availability, normalize alcohol, and block effective policy.

The 2025 evidence base therefore underlines the importance of a policy direction centred on protecting alcohol policy decision-making from conflicts of interest, scaling high-impact population measures such as alcohol taxation, advertising bans and common-sense limits on availability.

Studies from 2025 locating Big Alcohol practices within Determinants of Health (CDoH):

- Commercial determinants of health: the case of the alcohol industry.
<https://www.drugsandalcohol.ie/43352/>
- 'Any drink, anyone, anywhere'? A critical analysis of alcohol industry linked research on drink spiking
https://jech.bmj.com/content/79/Suppl_1/A24.2



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Studies from 2025 locating Big Alcohol practices within Determinants of Health (CDoH):

- Commodified upbringings: A narrative review on commercial determinants of child and adolescent mental health
<https://journals.sagepub.com/doi/abs/10.1177/00207640251341078>
- Controlling the NCD epidemic in south Asia: beyond lifestyle factors
[https://www.thelancet.com/journals/langlo/article/PIIS2214-109X\(25\)00481-4/fulltext](https://www.thelancet.com/journals/langlo/article/PIIS2214-109X(25)00481-4/fulltext)
- Corporate Profits and the Health of Americans
<https://pubmed.ncbi.nlm.nih.gov/41517050/>
- Countering industry promotion of harmful products to protect public health
<https://www.sciencedirect.com/science/article/pii/S2514664525000487>
- Harmful Marketing: An Overlooked Social Determinant of Health
<https://link.springer.com/article/10.1007/s11121-024-01763-x>
- How alcohol industries affect public health in Nepal: a qualitative study of commercial sector practices of alcohol industries based on the Lancet model of Commercial Determinants of Health
<https://bmjpublichealth.bmj.com/content/4/1/e003517>
- ONE: Introducing Non-Communicable Diseases and the Trade in Tobacco, Alcohol, and Unhealthy Food
<https://bristoluniversitypressdigital.com/monochap-oa/book/9781529242782/ch001.xml>
- The Evolving Alcohol Landscape: Implications for Public Health and Policy
<https://www.jsad.com/doi/full/10.15288/jsad.24-00339>

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Studies from 2025 locating Big Alcohol practices within Determinants of Health (CDoH):

- The rising influence of big business on policymaking: What it means for public health in NZ
<https://www.phcc.org.nz/briefing/rising-influence-big-business-policymaking-what-it-means-public-health-nz>
- Transnational alcohol corporations in Nigeria as commercial determinants of health: Implications for policy
<https://www.sciencedirect.com/science/article/abs/pii/S095539592500091X>
- Role of commercial determinants of health in use of alcohol in Nepal: An exploratory qualitative study
https://elibrary.nhrc.gov.np/bitstream/20.500.14356/2783/1/1.%20Preju_Kandel.pdf
- The spirit of the times: historical conditions and market-seeking FDI strategies by U.S. alcohol firms
<https://link.springer.com/article/10.1057/s41267-025-00773-3>
- The Commercial Determinants of Nonalcoholic Beer: Redemption, Revenue, or Men's Harm Reduction?
<https://pubmed.ncbi.nlm.nih.gov/39921265/>
- Young people's perspective on the influence of alcohol, tobacco, vaping and fast food industries
<https://pubmed.ncbi.nlm.nih.gov/40692634/>
- Examining the strategies and tactics of the alcohol industry during the COVID-19 pandemic in Botswana
<https://journals.sagepub.com/doi/full/10.1177/14550725251407459>
- Public health and harmful advertising: The nature and extent of children's real-time exposure to unhealthy commodity marketing
<https://pubmed.ncbi.nlm.nih.gov/40253977/>

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INDUSTRY-ADJACENT STUDIES OUTSIDE OF THE DUBIOUS FIVE:

- Active ingredients in waste of distillers' grains and their resource utilization
<https://link.springer.com/article/10.1007/s11157-025-09718-6>
- Brewing the Global Shift: Variegated Capitalism, Firm Strategies, and the Restructuring of the Southeast Asian Beer Industry
<https://www.tandfonline.com/doi/abs/10.1080/00472336.2023.2254774>
- Jiuxian: Revolutionizing Liquor Distribution in China Through Omnichannel Innovation
<https://www.igi-global.com/chapter/jiuxian/357067>
- Occurrence and characteristics of microplastics in South African beverages
<https://www.sciencedirect.com/science/article/pii/S0269749124021055>
- Wine industry by-products as a source of active ingredients for topical applications
<https://link.springer.com/article/10.1007/s11101-024-10030-4>



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KEY FINDINGS ACROSS THE DUBIOUS FIVE

- **Deception:** Big Alcohol and its front groups obscure the reality of alcohol harm by promoting misleading framings, selective evidence, and misinformation that confuse risk and weaken public support for effective solutions.
- **Manipulation:** Alcohol companies protect brand value and political access through image control – especially CSR and “good corporate citizen” narratives – that cultivate legitimacy while sales-driving practices continue unchanged.
- **Political interference:** Alcohol industry actors target decision-makers through lobbying, consultation submissions, and procedural tactics that delay, dilute, derail, or divide efforts to adopt and implement evidence-informed alcohol policy.
- **Promotion:** Alcohol marketing operates as a system that perpetuates the alcohol norm and drives consumption – especially through digital ecosystems, sponsorship, influencers, and brand extensions such as no/low-alcohol and “alibi” tactics that saturated environments with alcohol.
- **Sabotage:** Big Alcohol undermines public goods and institutional functioning when corporate conduct weakens enforcement, exploits regulatory gaps, and obstructs safeguards so formal rules fail to deliver protection in practice.
- **Commercial determinants of health:** The evidence shows that alcohol industry practices shape health and development outcomes through corporate power over markets, policy, and culture – linking affordability, availability, and acceptability to preventable harm and widening inequities.
- **Conflict of interest:** Alcohol industry ties distort evidence and governance when alcohol companies and industry-funded actors influence research, consultations, and policy processes, reducing policy integrity and shifting attention away from population-level solutions.

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THE BIG ALCOHOL EXPOSED - DUBIOUS FIVE STRATEGIES EXPLAINED

Big Alcohol Exposed categorizes evidence according to the alcohol industry strategy being exposed – what the industry does, who it targets, and what public-interest outcome it undermines.

- **Deception:** obscures public recognition of alcohol harm, distorts risk, and sows doubt about the root causes of harm and the most effective policy solutions.
- **Manipulation:** controls corporate and brand image through reputation management and “good corporate citizen” narratives such as CSR and various forms of washing.
- **Political interference:** targets decision-makers and opinion leaders through lobbying and influence activities designed to delay, dilute, derail, or destroy policies that threaten sales and profits.
- **Promotion:** drives availability, acceptability, attractiveness of alcohol products to perpetuate the alcohol norm through marketing systems, including sponsorship, digital tactics, and brand extensions.
- **Sabotage:** obstructs people’s access to public goods by undermining laws, regulations, enforcement, and institutional functioning, including unethical and illegal alcohol industry practices.

Evidence is coded to the primary strategy the study reveals, ensuring clarity and consistency for policy, advocacy, and public discourse.

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METHODOLOGY

Search strategy and review approach

We conducted a structured literature search to identify independent peer-reviewed research about alcohol industry practices and their impacts on health, development, and policy integrity. We attempt to provide a comprehensive overview, focusing on independent scientific studies and landmark reports that elevate the understanding of the alcohol industry, their practices and impact on societies.

This overview is however not a scientific study in itself. Gaps might exist, in part due to time constraints of the literature review and in part due to the limited nature of the search.

Database and search terms

We searched PubMed and Google Scholar using the term “alcohol industry” and screened all returned records. We conducted supplementary PubMed and Google Scholar searches using targeted terms to capture known entities and tactics, including Big Alcohol, conflict of interest, commercial determinants, corporate determinants, alcohol marketing, lobbying, sports sponsorship, ISFAR, IARD, CSR, pinkwashing, greenwashing, front groups, and misinformation, and screened reference lists of included papers to identify additional relevant studies.

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Eligibility criteria

We included scientific studies for this overview when they were published in 2025, or late 2024, were free from alcohol industry conflicts of interest, were published in a peer reviewed scientific journal, and provided insights into the practices of alcohol companies and their front groups, evidence on the harms these practices cause, and how to address and overcome alcohol industry strategies. We also include a small number of high-relevance commentaries/chapters/preprints when they clearly provide alcohol industry insights.

We grouped our results into the Dubious Five categories plus two additional categories to provide meaning and inform the public discourse.



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Limitations

This overview provides structured coverage but does not claim complete capture of all relevant publications. Limitations include database scope, indexing lag, and incomplete COI disclosures in some publications.

Key facts about the overview

- We include 77 studies and reports in this overview of 2025.
- We grouped these studies and reports according to the Dubious Five categories and added two more: alcohol industry as commercial determinants of health and alcohol industry conflict of interest. This categorization helps visualize and explain the impact of Big Alcohol practices on societies and communities around the world – as revealed by latest science.
- The Dubious Five category of “Promotion” contains by far the highest number of studies and reports (26), indicating a clear focus in the scientific community on alcohol marketing systems and their role in perpetuating the alcohol norm, including digital marketing, sponsorship ecosystems, brand extensions, and youth exposure.
- Political interference also shows a substantial evidence base (19), reflecting strong scientific attention to lobbying, consultation submissions, procedural delay, and policy dilution tactics.
- Other categories clearly need greater attention, especially Sabotage (2) and Manipulation (3), pointing to an underdeveloped research focus on rule-breaking and enforcement obstruction, institutional disruption, and image-laundering strategies such as CSR and other forms of washing.

7. KEY TAKEAWAYS FOR ADVOCATES AND POLICYMAKERS



7. KEY TAKEAWAYS FOR ADVOCATES AND POLICYMAKERS

The evidence documented in 2025 reveals an industry operating under escalating pressure. As alcohol sales stagnate in traditional markets and social norms shift toward health and well-being, Big Alcohol has entered a phase of aggressive volatility. Falling stock prices and leadership instability have not led to corporate introspection; instead, they have triggered a desperate surge in political interference, expansion of insidious marketing, and tactical deception.

The following takeaways provide a framework for making sense of alcohol industry conduct in 2025 and advancing evidence-based alcohol policy.

1. RECOGNIZE THE AGGRESSION OF A DECLINING INDUSTRY

Current industry aggression is a symptom of commercial vulnerability. As volume growth slows and investor anxiety rises, alcohol companies are more likely to deploy high-risk, high-impact interference strategies. The “smokescreen” and “wellness washing” tactics identified this year are not signs of strength, but defensive reactions to a changing social and economic landscape. This volatility makes the need for independent, public interest monitoring more urgent than ever.

2. CHALLENGE ALCOHOL INDUSTRY INFLUENCE “UPSTREAM”

Much of Big Alcohol’s influence occurs long before legislation and policy are drafted. It operates through agenda-setting, problem framing, and the strategic production of industry-aligned evidence – all intended to pollute the discourse on alcohol harm and policy. By the time formal policy debates begin, the range of “acceptable” options has often already been narrowed by industry narratives.

7. KEY TAKEAWAYS FOR ADVOCATES AND POLICYMAKERS

3. PRIORITIZE STRUCTURAL SOLUTIONS OVER BEHAVIOURAL RHETORIC

The “Responsibility Illusion” remains the industry’s most effective tool for delaying policy progress. By framing alcohol harm as a matter of personal behaviour, the industry successfully diverts attention from their own products and practices – serious commercial determinants of health. Policymakers should treat voluntary industry commitments as political cover for inaction rather than genuine progress. Effective policy prioritizes the WHO “Best Buys” – alcohol taxation, availability limits, and comprehensive alcohol advertising, sponsorship and promotion bans – as these structural measures are proven solutions to prevent and reduce alcohol harm at a population level.

4. SAFEGUARD POLICY INTEGRITY FROM CONFLICT OF INTEREST

The 2025 Big Alcohol Exposed report demonstrates that alcohol industry participation in policy processes inevitably results in diluted public health outcomes. Whether through the capture of health policy in New Zealand or the promotion of industry-sponsored “reforms” that expand availability, the industry’s goal is to protect profits, not people. Implementing robust and comprehensive conflict-of-interest safeguards that exclude alcohol industry actors and their front groups from decision-making spaces is key for governments to ensure the effectiveness of alcohol policy.

5. COUNTER THE ILLICIT TRADE DISTRACTION WITH INDEPENDENT EVIDENCE

The use of opaque, industry-funded data to inflate fears of illicit trade is a globally coordinated tactic used to derail pro-health tax reforms. Using evidence and data in alcohol policy making initiatives that is methodologically transparent, independently produced, and free from alcohol industry links is critical to safeguard alcohol policy initiatives from false alcohol industry claims. Strengthening tax administration and enforcement capacity – not lowering taxes – is the evidence-based response to illicit markets.

7. KEY TAKEAWAYS FOR ADVOCATES AND POLICYMAKERS

6. ADDRESS THE DIGITAL INFRASTRUCTURE OF HARM

Alcohol harm is increasingly driven by digital systems that are part of people's daily life. Alcohol industry infiltration of streaming platforms, social media, and ultra-fast delivery apps has transformed alcohol into an on-demand commodity saturating communities and private spaces. These digital environments are no longer peripheral marketing channels; they are core infrastructure for alcohol promotion and availability. Modernizing regulatory frameworks to address these digital systems is essential to prevent these platforms from undermining existing public health protections.

7. POSITION MONITORING AS A PUBLIC HEALTH INTERVENTION

The systematic monitoring of industry conduct is itself a tool for public health. Documentation exposes patterns that would otherwise remain obscured – such as front groups posing as neutral actors, a coordinated global campaign to push “illicit trade” claims, or marketing embedded in cultural environments. Monitoring, documenting, and revealing harmful alcohol industry practices strengthens credibility and counters industry narratives. For policymakers, it provides the essential context required for informed, public interest decision-making.

8. ALCOHOL POLICY IS AN ACHIEVABLE PUBLIC INTEREST GOAL

Evidence-based alcohol policy remains both important, urgently needed, and achievable. Despite alcohol industry interference, the evidence base for addressing affordability, availability, and marketing is broad, compelling, and expanding further. Shifting the political debate toward a “well-being economy” framework helps counter industry narratives that prioritize short-term commercial growth over long-term community health and societal development.

Preventing and reducing alcohol harm requires confronting commercial determinants directly, not negotiating around them. The findings in this report make clear that this is a moment for evidence-based leadership and people-centred policy action.

ANNEX 1

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