

The global alcohol industry: an overview

David H. Jernigan

Department of Health, Behavior and Society, Johns Hopkins Bloomberg School of Public Health, Baltimore, MD, USA

ABSTRACT

Aims To describe the globalized sector of the alcoholic beverage industry, including its size, principal actors and activities. **Methods** Market research firms and business journalism are the primary sources for information about the global alcohol industry, and are used to profile the size and membership of the three main industry sectors of beer, distilled spirits and wine. **Findings** Branded alcoholic beverages are approximately 38% of recorded alcohol consumption world-wide. Producers of these beverages tend to be large multi-national corporations reliant on marketing for their survival. Marketing activities include traditional advertising as well as numerous other activities, such as new product development, product placement and the creation and promotion of social responsibility programs, messages and organizations. **Conclusions** The global alcohol industry is highly concentrated and innovative. There is relatively little public health research evaluating the impact of its many marketing activities.

Keywords alcohol, advertising, marketing, globalization, multi-nationals, responsibility.

Correspondence to: David H. Jernigan, Department of Health, Behavior and Society, Johns Hopkins Bloomberg School of Public Health, 624 N. Broadway, 2nd Floor, Baltimore, MD 21205-1996, USA. E-mail: djerniga@jhsph.edu

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INTRODUCTION

Alcohol can be made from a wide variety of agricultural inputs, and is produced both formally and informally throughout the world. The 'industry' producing alcoholic beverages may take many forms, including a single woman or a group of women brewing traditional beer in an African village; a network of industrial breweries created originally by colonial authorities to brew traditional-style beer and then controlled by transnational corporations and/or local governments; national or regional production networks producing beer, spirits or wine and controlled by domestic companies; or complex and globally integrated production, distribution and marketing chains making beer, spirits and/or wine available and coordinated by multi-national corporations [1]. Production, wholesaling and distribution and retailing are all parts of the industry, and no single paper could hope to describe all these disparate activities. This paper will focus on the globalized segment of the alcohol industry, its size, structure, major players and activities.

THE WORLD'S LARGEST ALCOHOL MARKETERS

The alcoholic beverage industry includes producers, wholesalers and distributors, point-of-sale operators (whether licensed or not) and hospitality providers such as hotels or cafés that serve alcohol. Its production and distribution arms are allied closely with agriculture, trucking, capital goods manufacturing and packaging industries. Its marketing wing spends heavily in the industries of advertising, sport and entertainment (including films, television and music). Within countries there are varying degrees of vertical integration of alcohol production, distribution and sales, with a general trend towards this fueled by economic liberalization and accompanying regional and global trade agreements. At the same time there are a few cases of national political realities (such as the constitutionally mandated three-tier system in the United States, or the move by South Africa's principal brewer to spin off its truckers into independent small businesses with the end of apartheid) that occasionally exert pressure in the opposite direction.

Table 1 Ten largest global beer marketers (by volume), 2006 [35,36].

Corporation	Headquarters	Global market share (rank)	
		1979/80	2006
Inbev	Belgium	*	13.9% (1)
SABMiller	UK	4.7% (2-Miller) 0.9% (17-SAB)	11.8% (2)
Anheuser-Busch	USA	6.5% (1)	11.5% (3)
Heineken	Netherlands	2.8% (4)	8.3% (4)
Carlsberg Breweries	Denmark	3.1% (3)	4.5% (5)
Scottish Courage	UK	*	3.6% (6)
China Resources Enterprise	China	*	3.3% (7)
Grupo Modelo	Mexico	1.3% (12)	3.1% (8)
Molson Coors	USA	*	3.1% (9)
Baltic Beverages Holding	Russia	*	2.9% (10)
Total market share of top 10 companies		28.0%	66.0%

*Did not exist or not in the top 30 in 1979/80.

There is also growing integration across products. In particular, wine marketers are being bought up by other sectors of the industry, at the same time that wine is beginning to catch up in the development of global brand identities and distribution systems. As a California wine consultant recently remarked, 'The wine business is no longer a production-driven business as it has been traditionally; it's fast becoming a marketing-driven business' [2]. Among the 10 largest global wine marketers, at least three have significant holdings in beer and/or spirits. The world's largest wine maker, US-based Constellation Brands, also markets both beer and spirits.

Globally, informal or 'unrecorded' production, trade and sale of alcohol is substantial, amounting to at least two-thirds of alcohol consumption in the Indian subcontinent, approximately half of consumption in Africa and a third of consumption in Eastern Europe and Latin America [3]. According to the alcohol industry-funded International Center on Alcohol Policies (ICAP), branded alcoholic beverages account for 38% of recorded alcohol consumption world-wide [4]. However, national markets for alcohol are generally led by these globalized alcoholic beverages, brands that have regional or global marketing campaigns and attendant identities [5].

Within this globalized sector, a few large companies dominate. The 26 largest alcoholic beverage companies had a total net revenue/turnover of \$155 billion in 2005, and a total operating profit of \$26 billion [6]. The 10 largest alcoholic beverage marketers accounted for 48% of sales (by volume) of globalized brands in 2005. All 10 of these are beer companies. Together, they also accounted for 66% of production of globalized beer. Ranking the global alcohol companies by net revenue/turnover rather than by volume shows the value of distilled spirits relative to beer on the global market. The

leading company in terms of net revenue/turnover in 2005 was Diageo plc, followed by Heineken NV, InBev, SABMiller and Anheuser-Busch, Inc. [6].

Globalization in the alcoholic beverage industry tends to lead to greater concentration of ownership and greater dependence on marketing. As a recent study of multinational survival in the global alcohol industry concluded, '... in non-science-based industries such as alcoholic beverages, ... brands and marketing knowledge rather than technological innovation are central in explaining the growth and survival of multinational firms' [7]. Over the past 30 years the global beer industry has become much more concentrated, as demonstrated by Table 1.

Global distilled spirits marketing is also highly concentrated. The 10 largest marketers (by volume) have, since 1991, been responsible consistently for more than half the volume of globalized distilled spirits sold, and the market share of the two largest companies has increased by 65%, as shown in Table 2.

In contrast, global wine brands are just beginning to emerge. The global wine industry continues to lie primarily in the hands of smaller producers, although concentration has increased slightly, and the dominance of producers headquartered in the United States has grown (Table 3).

On a regional level the pace of concentration has quickened, particularly in Latin America. As Table 4 shows, mergers and acquisitions caused single companies to dominate beer markets in at least 12 countries in that region.

The largest of the global alcohol marketers rank among the world's largest corporations: based on 2006 figures, InBev was 439th and Anheuser-Busch 479th in the *Fortune Global 500*, ranked on the basis of revenues

Table 2 Ten largest global distilled spirits marketers (by volume), 2006 [37].

Corporation	Headquarters	Global market share (rank)	
		1991	2006
Diageo	UK	10.5% (1)	15.3% (1)
Pernod Ricard	France	5.7% (4)	11.6% (2)
United Spirits Ltd	India	3.7% (8)	9.4% (3)
Bacardi	Bermuda	7.7% (3)	5.2% (4)
Beam Global Spirits and Wine	USA	4.8% (6)	5.1% (5)
Suntory	Japan	4% (7)	2.6% (6)
V&S Group	Sweden	*	2.5% (7)
Brown-Forman Beverages Worldwide	USA	*	2.5% (8)
Gruppo Campari	Italy	*	2.4% (9)
Constellation Spirits	USA	2.5% (10)	2.4% (10)
Total market share of top 10 companies		57.0%	59.0

*Not in the top 10 in 1991.

Table 3 Ten largest global wine marketers (by volume), 2006 [2,38].

Corporation	Headquarters	Global market share (rank)	
		1997	2006
Constellation Brands	USA	1.3% (3)	3.9% (1)
E&J Gallo Winery	USA	2.4% (1)	2.7% (2)
The Wine Group	USA	1.0% (6)	1.6% (3)
Foster's Wine Estates	Australia	*	1.5% (4)
Pernod Ricard	France	*	1.4% (5)
Castel Freres	France	1.4% (2)	1.4% (6)
Bacardi	Bermuda	*	1.0% (7)
Les Grands Chais de France	France	*	0.8% (8)
Vina Concha y Toro	Chile	*	0.8% (9)
Distell Group	South Africa	*	0.7% (10)
Total market share of top 10 companies		12.6%	15.9%

*Not in the top 10 in 1991.

(NB Totals may not add up due to rounding.)

alone. Anheuser-Busch ranked 44th in the world in return on assets. It had \$15.7 billion in revenues and \$2 billion in profits in 2006 [8]. Anheuser-Busch ranked 57th in *Advertising Age's* 2006 list of the top 100 global advertisers, with advertising spending of \$633 million in 2005. Five other global alcohol marketers made the top 100 as well: SABMiller at number 69, Diageo at number 77, Heineken at number 85, InBev at number 90 and Molson-Coors at number 94 [9].

THE IMPACT OF GLOBALIZATION

Globalization in these industries conveys several advantages. Products become more standardized globally, which may lead to an increase in the overall quality of alcoholic beverages available. Global distribution networks can be more efficient economically, creating oppor-

Table 4 Concentration in the Latin American brewing industry [39].

Country	Brewer	Share of domestic market
El Salvador	SABMiller	95%
Honduras	SABMiller	95%
Panama	SABMiller	79%
Colombia	SABMiller	99%
Ecuador	SABMiller	93%
Peru	SABMiller	99%
Brazil	Inbev	66%
Paraguay	Inbev	95%
Uruguay	Inbev	98%
Argentina	Inbev	79%
Chile	CCU (part-owned by Heineken)	90%
Mexico	Grupo Modelo/Anheuser-Busch	63%

tunities for economies of scale in production and in marketing. In addition, global products can benefit from the global division of labor, using the comparative advantage possessed by multiple countries to develop new products, obtain ingredients, locate manufacturing and develop global marketing campaigns. The creation of global networks can increase employment and diffuse technological advances from more- to less-developed countries, although in practice control over much of the technology tends to remain in the hands of the global corporations [10]. While most alcoholic beverages are consumed in the country in which they are produced, globalization can lead to an increase in international trade, but this trade rarely benefits developing nations. Global trade figures suggest that the overwhelming majority of global trade in alcoholic beverages occurs among the developed countries themselves, with very few middle- or low-income countries (e.g. Chile, Mexico) breaking into the ranks of the leading exporters [5].

This level of globalization and concentration can also lead to monopoly pricing and extraction of monopoly profits, as well as creating much larger political and economic actors within each national context. The fact that these companies are also major advertisers increases their visibility at the national level. For instance, SAB-Miller ranks among the 10 largest advertisers in South Africa, Uganda, Colombia, Ecuador and Peru. Diageo is among the top 10 advertisers in Ghana, Nigeria and Ireland, while InBev holds that ranking in Serbia, Ukraine, Argentina and Paraguay [9]. Globalization also enables countries to shift resources from one market to another. For instance, when South African Breweries bought a controlling share in Miller Breweries from Philip Morris and became SABMiller, it was able to shift both personnel and financial resources to its new US subsidiary to bolster its position in the very competitive US market. Globalization also leads to rapid transfer of innovation from one market to another. These innovations can be in the realm of product design (as in the global spread of the new 'ready-to-drink' flavored alcoholic beverage segment [11]), production technology, distribution, marketing and public relations, as in the case of alcohol industry-funded 'social aspects organizations', which will be discussed in greater detail below.

The role of global alcohol producers as major advertisers points to the central difference between globalized and other types of alcohol. Global alcohol is marketed, and this marketing is the dominant feature of its global production network [12]. Production of alcoholic beverages, and particularly of beer, is delegated easily. In Malaysia, for instance, a joint venture between Guinness and Heineken produces both beers under the supervision of a Heineken brewmaster; in Ireland, Guinness brews Carlsberg. Distribution can also be coordinated between

the major players. Again, in Malaysia in the 1990s, a joint venture between Diageo and LVMH (Moët Hennessy Louis Vuitton SA) coordinated importation and distribution of brands for those two companies [5].

However, control over marketing of brands, the creation and propagation of the brand's identity, remains in the hands of each brand owner. This marketing knowledge involves embedding the brand in the life and lifestyle of the target users. Successful brands become part of the identity of the consumer: 'The presence of a brand (or even the attitudes held toward it) can serve to define a person with respect to others, and when social identity is involved, what is expressed can be very important to the individual. . . . [The] brand becomes an extension or integral part of the self' [13].

The range of marketing activities is increasingly broad, as evidenced by the US Federal Trade Commission (FTC)'s most recent request of alcohol marketers for information on their marketing expenditures. The FTC asked for expenditures in 22 categories: television advertising; radio advertising; magazine advertising; newspaper advertising; transit advertising; outdoor advertising; direct mail advertising; company-sponsored internet sites; other internet site advertising; other digital advertising; specialty item distribution; public entertainment events; not sports-related; sponsorship of sporting events, sports teams or individual athletes; other point-of-sale advertising and promotions; spring break promotions; product placements; retail value-added expenditures; telemarketing; promotional allowances; sports and sporting events; and social responsibility programs and messages [14].

Public health research on the impact of alcohol marketing has not kept up with the pace of innovation. A few studies from the United States in the past decade have used longitudinal designs to estimate the impact of a small subset of these 22 categories of marketing activity on young people's drinking behavior. In the traditional media of television, magazines, radio and billboards, analysis of data from a longitudinal study of 1872 youth aged 15–26 years in 24 media markets found that for every additional advertisement young people reported seeing or hearing above an average of 23 per month, they drank 1% more, while every additional dollar spent per capita on alcohol advertising in their media market was associated with a 3% increase in young people's drinking [15]. Self-reported exposure to television programs containing alcohol advertisements in a sample of 2250 12- and 13-year-old schoolchildren from Los Angeles public schools was associated with increased risk of drinking and of heavy drinking (defined as three or more drinks on an occasion for this population) a year later [16]. Surveys of 1786 11- and 12-year-old schoolchildren in South Dakota found that exposure to television beer advertise-

ments, alcohol advertisements in magazines, in-store beer displays and beer concessions, radio-listening time and ownership of beer promotional items was strongly predictive of drinking and intentions to drink 1 year later [17]. Exposure to drinking acts in films among a sample of 2406 10–14-year-olds who had never drunk alcohol at baseline predicted drinking onset [18], while ownership of alcohol-branded merchandise at follow-up was also associated strongly cross-sectionally with onset of drinking [19]. Two studies have used different methodologies to estimate the impact of an advertising ban on youth drinking in the United States. One study found that, because of its effects on young drinkers, a complete advertising ban would reduce total mortality by 7609 and alcohol-related years of life lost by 16.4% [20]. Another estimated that a 28% drop in youth advertising exposure would lead to a drop of between 4% and 16% in youth drinking and between 8% and 33% in youth binge drinking [21].

There has been very little public health research, however, on such areas of rapid change as new product development and product placement. Introduction of flavored alcoholic beverages into Wales in the mid-1990s was linked closely with increases in weekly drinking among 11–16-year-olds [22]. In the United States, flavored alcoholic beverages have proved most popular among the youngest drinkers, and more popular among females than males in every age group [23]. A marked shift in beverage preference among 17- and 18-year-old binge-drinking girls from beer to distilled spirits occurred between 2001 and 2005 [23], during the same period that flavored alcoholic beverages were introduced into the US market, and marketers spent more than \$360 million on television advertisements for distilled spirits branded 'flavored alcoholic beverages', such as Smirnoff Ice and Bacardi Silver [24]. The flavored alcoholic beverages have been followed by pre-mixed alcoholic energy drinks, enabling combinations of alcohol and caffeine, which researchers in Brazil and Italy have warned bear the risks of making drinkers think they are alert when their motor skills are still impaired [25,26].

Regarding product placement, on its website Anheuser-Busch reports placements in more than 20 popular films, including *Wedding Crashers*, *Batman Begins*, *Spider-Man*, *Dodgeball* and *Ace Ventura: Pet Detective*. Coors sponsored *Scary Movie 3*, Heineken co-branded its advertising with *Matrix Reloaded* and Kahlua made a prominent appearance in *Catwoman*. Yet aside from the single study cited above, there has been no public health research published to date assessing the effects of this marketing strategy on drinking behavior.

According to *Advertising Age*, leading alcohol marketers in the United States have recently decreased their spending on traditional media significantly, showing a

12% drop from 2005 to 2006, and a 24% drop in the first 6 months of 2007. Spokespeople for the companies told *Advertising Age* that their marketing budgets have not declined. Rather, they have simply shifted their marketing dollars to less traditional channels. For instance, on television SABMiller had its products integrated into a sketch on NBC's *Late Night with Conan O'Brien*, obviating the need for additional paid advertising. The company also reported putting more money into promotions such as a bar games Olympics and a concert series [27]. Rather than buying television time, Diageo placed a 2-minute commercial for its new Smirnoff Raw Tea flavored alcoholic beverage on YouTube.com, generated more than 3 million viewings, and followed it with a 3-minute sequel which has also been viewed more than 3 million times. Anheuser-Busch has experimented with providing original programming over the web through its BudTV site. While the site has generated disappointing traffic, a 1-minute advertisement for Bud Light called 'Swear Jar' migrated to YouTube.com and generated more than 2 million viewings. There are as yet no standard methods for measuring the impact of this kind of viral marketing, for either commercial or public health purposes.

Globalization of production and marketing networks has permitted the alcohol industry to increase global integration of production and marketing, and to diffuse sophisticated technologies for producing and marketing its products rapidly around the world. It has also created a small group of large corporations who are able to promote their points of view effectively in global forums, such as the World Trade Organization and the World Health Organization.

SOCIAL ASPECTS ORGANIZATIONS

One innovation that has diffused rapidly in the industry is the 'social aspects organization'. The US Federal Trade Commission included in its list of alcohol advertising, merchandising and promotional activities the industry's social responsibility messages and programs. Production of social responsibility messages and programs is sometimes an obvious subset of marketing, as in Diageo's 'branded social responsibility' commercials on US television. These programs and messages do not operate from a public health evidence base. In the United States there are no industry-funded programs in the federal government's National Registry of Effective Prevention Programs. The distilled spirits industry-funded Century Council's signature prevention program, the computer-based Alcohol 101plus, has not been evaluated. Its predecessor, Alcohol 101, was included in several evaluations, none of which have found any effect on drinking behavior from completion of the program [28–31].

Without public health research in support of them, these programs and messages may be viewed as another form of marketing. Like corporate image advertising, they promote the responsibility of the brand, its parent company or the industry itself. When these activities are organized at national or international levels, they are sponsored by what has become known as social aspects organizations. According to the International Center on Alcohol Policies, there are now more than 30 of these in at least 23 countries. Most operate nationally or regionally but others, such as ICAP and the Global Alcohol Producers Group, work on alcohol policy issues at the global level. In the European Union, seven of the largest distilled spirits marketers have formed the European Forum for Responsible Drinking. In the United Kingdom, alcohol producers, supermarkets and pub operators have banded together to form Drinkaware, which the *Guardian* newspaper described as an effort to head off government proposals for a binge drinking levy [32]. In the United States, in addition to ICAP, Berman and Co., with the backing of alcohol, tobacco and food interests, operates three entities: the American Beverage Institute, the Center for Consumer Freedom and the Washington Legal Foundation. Distilled spirits marketers fund the Century Council, brewers fund the Alcohol Beverage Medical Research Foundation, and there are numerous fully or partially industry-funded research centers [33].

Social aspects organizations may operate, fund and disseminate prevention programs. They may also seek to influence alcohol policies at national and international levels, become members of relevant non-alcohol specific organizations and committees, recruit scientists, prepare and promote 'consensus' statements and codes of practice, host conferences and promote high-profile publications reflecting the industry's point of view on alcohol issues, and create other social aspects organizations in emerging markets and low-income countries.

The point of view promoted by these organizations has been summarized as follows: patterns of drinking are the best basis for alcohol policies; responsible drinking can be learned; public/private partnerships will increasingly influence alcohol policy development; the beverage alcohol industry will strengthen its self-regulatory mechanisms; and alcohol—despite its potential for abuse—confers a net benefit on society [33]. From a research point of view, these points of view are controversial, unconfirmed or unsupported by current research evidence [34]. Viewing these entities as part of the industry's marketing apparatus situates their activities more accurately not in the realm of prevention research and practice, but rather as part of an integrated and global strategy of branding and promotion.

CONCLUSION

The globalized segment of the alcohol industry is large and concentrated in the hands of a relatively small number of companies, particularly in the case of beer and distilled spirits. These companies employ a range of activities to promote themselves and their products. Although longitudinal studies have been conducted to assess the public health impact on young people of a small subset of activities, for the most part public health research has not kept up with the ability of this industry to innovate in its marketing and its organization. Research studies are needed that will focus on the health and political impacts of the global alcohol industry.

Declaration of interest

None.

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