

THE ALCOHOL INDUSTRY'S

COMMERCIAL AND POLITICAL ACTIVITIES

in Latin America and
the Caribbean

IMPLICATIONS FOR PUBLIC HEALTH



ACKNOWLEDGEMENTS

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The alcohol industry's commercial and political activities in Latin America and the Caribbean

IMPLICATIONS FOR PUBLIC HEALTH



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Abbreviations

AB InBev	Anheuser-Busch InBev	FLASCO	Latin American School of the Social Sciences (<i>Facultad Latinoamericana de Ciencias Sociales</i>)
BAC	Blood alcohol concentration	GAPG	Global Alcohol Producers Group
BMJ	<i>British Medical Journal</i>	GL	Gay Lussac
BRANA	Brasserie Nationale d'Haiti S.A	IARD	International Alliance for Responsible Drinking (formally ICAP)
CARICOM	Caribbean Community	ICAP	International Center for Alcohol Policies
CBA	Caribbean Breweries Association	IDB	Inter-American Development Bank
CBN	Cervecería Boliviana Nacional S.A	ITESM	Institute of Technology and Higher Education- Monterrey
CCU	Compañía de Cervecerías Unidas	LAC	Latin America and the Caribbean
CISA	Centre for Information on Health and Alcohol	MOU	Memorandum of understanding
CN	Panama's National Brewery (<i>Cervecería Nacional</i>), run by SABMiller, now AB InBev	NCDs	Non-communicable diseases
COI	Conflict of interest	NGO	Non-governmental organization
CPA	Corporate political activity	PAHO	Pan-American Health Organization
CSR	Corporate social responsibility	SAB	SABMiller, plc (<i>Merged with AB InBev in 2016</i>)
DG	Director General	SAPROs	Social aspects and public relations organizations
FEMSA	Mexican Economic Promotion (<i>Fomento Económico Mexicano, S.A.B. de C.V.</i>)	TTBAA	Trinidad & Tobago Beverage Alcohol Alliance
FISAC	Foundation for Social Research (<i>Fundación de Investigaciones Sociales, A.C.</i>)	WHA	World Health Assembly
FIFA	International Soccer Association (<i>Fédération Internationale de Football Association</i>)	WHO	World Health Organization
FIVS	International Trade Federation of Wine and Spirits (<i>Federación internacional de Vins e spiritueux</i>)		

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Foreword

In Latin America and the Caribbean (LAC), the harmful use of alcohol is one of the leading risk factors for death and disability. In spite of the harms it can cause to the user and to those around them, alcohol does not receive due attention and action. Every life devastated by alcohol could have been protected.

Cost-effective alcohol control policy measures exist, but are often under-utilized. To support governments in developing and implementing such policies, the WHO recently launched the SAFER initiative together with other UN agencies and civil society, including a technical package reinforcing the WHO Global Strategy on the harmful use of alcohol and 'best buys' for reducing alcohol-related noncommunicable disease (NCD) harm. However, implementation of these and other evidence-based measures has been far too slow to prevent the harm done by alcohol to millions of lives, and to deliver on NCD and Sustainable Development Goal (SDG) targets now and in the next decade.

Public health advocates have been frustrated by this slow progress, alarmed at the increasing harms alcohol is causing in LAC, and outraged at the advancing of the alcohol industry into fertile ground. International alcohol producers are looking to middle-income countries to bolster their future profits, relying heavily on advertising and other marketing efforts to ease their expansion into these 'emerging markets'. They are also relentlessly taking advantage of tourism as an entry point to the Caribbean's small island developing states.

This report describes the role of the alcohol industry in influencing regional policies that affect public health and social welfare, using tactics that resemble those of other unhealthy commodity industries such as ultra-processed food, sugar-sweetened beverage, and tobacco, which are far more frequently exposed and challenged in LAC. It shows how the alcohol industry works in tandem to oppose effective alcohol policies and actively engage in strategic practices that compromise public health in the region, and provides evidence and analysis of how policy is undermined by vested interests, most recently in the face of the COVID-19 pandemic.

This report underlines our assertion that greater attention to how alcohol industry products and practices are harming health, families, communities and economies is well overdue, as is a proportionate response. The exhaustive analysis of the situation brings new evidence to the table that must help protect public health-oriented policy-making from interference by the alcohol industry.

The organizations involved in publishing this report thank the authors for such a thorough job done. We are grateful for the opportunity to put it in the public realm in the hope that it will stimulate and inspire further research and funding, motivate civil society to question and probe harder, and encourage advocates to use such evidence to hold governments accountable and to strengthen their advocacy for evidence-based cost-effective alcohol policy interventions. We also hope that this report will help policy makers to better recognize and prevent conflicts of interest and industry interference, so that more people will be protected.

With millions of lives damaged each year by alcohol, corporate vectors of harm profiting from such a harmful substance, and the world's governments stalled in their pursuit of NCD and SDG targets for alcohol harm reduction, this report reinforces the case for action on alcohol. There is no time to waste in illuminating, exposing and justifying greater protections for and implementation of evidence-based alcohol policy made in the interests of public health.

NCD Alliance

Global Alcohol Policy Alliance (GAPA)

FORUT

Healthy Latin America Coalition (CLAS)

Healthy Caribbean Coalition (HCC)



Executive summary

The harmful use of alcohol is a leading risk factor for death and disability in Latin America and the Caribbean (LAC). This report describes the role of the alcoholic beverage industry in alcohol policies that affect public health and social welfare in LAC.

The alcohol industry consists of the major producers, distributors, and retailers of alcoholic beverages, as well as their trade associations and “social aspects” organizations. There is growing evidence that the alcohol industry opposes effective alcohol policies and is actively engaged in activities that have a negative impact on public health. As such, this report focuses the industry’s commercial activities as well as strategies implemented by means of political tactics and social responsibility programs that are likely to shape alcohol policy in the region to the detriment of public health.

The source materials for this report consist of industry documents, organizational websites, annual reports, industry trade journals, and publicly available presentations, transcripts of calls and business meetings. Additional information was obtained from an extensive search of the world scientific literature including articles, reviews, editorials, commentaries, newspaper articles, books, book chapters, and unpublished documents. Key informants and experts were also contacted through listservs to inquire about unpublished work and ongoing research.

The activities of the industry that have implications for public health were found to be diverse, multifaceted, and widespread in the LAC region. Commercial activities include the concentration of ownership of alcohol brands and products by a small number of transnational alcohol corporations, and use of sophisticated marketing techniques to target adolescents and other vulnerable groups. Strategies include information campaigns to achieve strategic objectives, constituency building, substituting ineffective for effective policies, using financial measures to influence favorable policies, and legal action. Tactics such as lobbying, image advertising, building strategic alliances, and litigation in the courts are used to influence industry-favorable policies in four key areas: alcohol availability, alcohol pricing

and taxes, marketing regulations, and drink-driving countermeasures. Almost every country in Latin America and the Caribbean has been exposed to some of these tactics.

Multiple activities are often practiced simultaneously to achieve favorable policy outcomes. Far from being a passive supplier of alcohol products, the qualitative data presented in this report suggest that the industry is actively involved in promoting demand for alcohol in order to increase sales and profits, particularly in new market segments like women and young adults. In its promotion of ineffective policies and its opposition to effective, evidence-based policies, the alcohol industry has demonstrated a clear inability to cooperate with governments in areas related to public health. The alcohol industry’s activities in the Region are compromising the work of public health community, the World Health Organization, and the NGOs working in the public health area to deal with the burden of disease attributable to alcohol. Their activities during the coronavirus pandemic to promote alcohol use and remove regulatory controls are a prime example of their interference with public health measures.

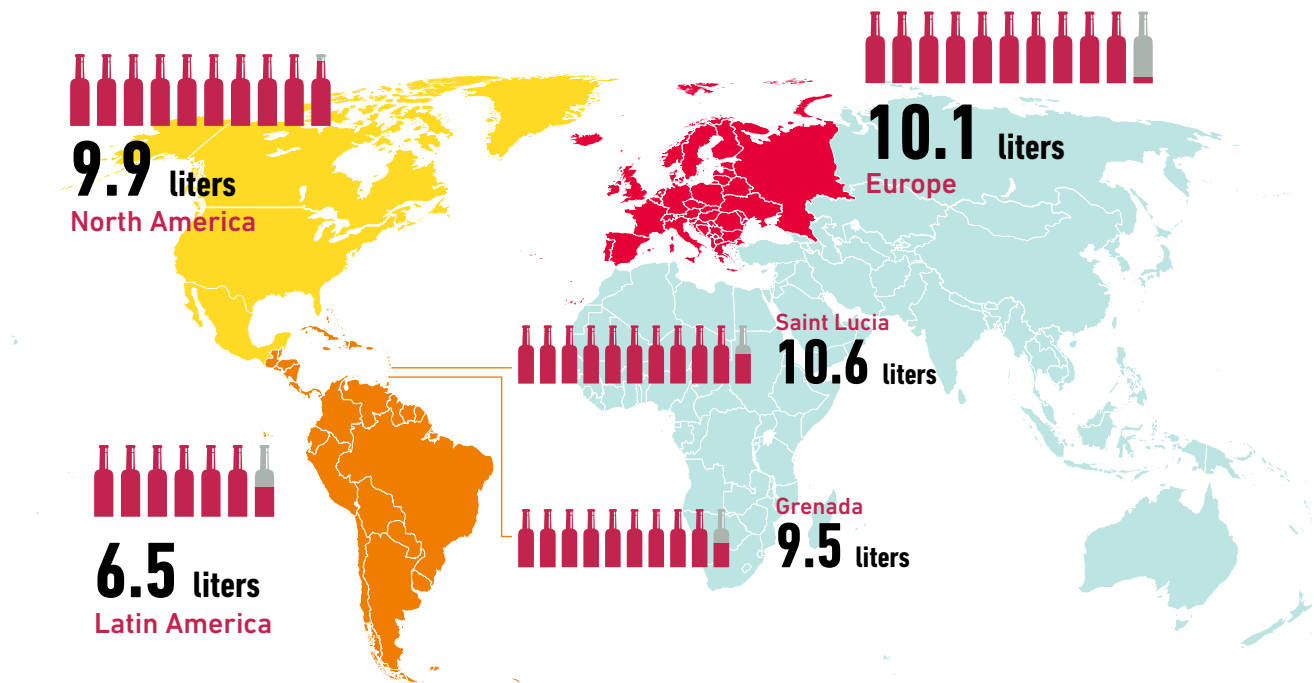
This report provides strong evidence for the epidemiologic cascade theory that describes the process through which the maximization of corporate profit-taking compromises public health. It suggests that the influence of the large transnational alcohol corporations on the policy environment is manifested through a network of major producers, proxy organizations and affiliated interest groups. Using strategies and tactics borrowed from the tobacco industry, public health measures have been difficult to implement even when there is strong scientific evidence of their effectiveness. For want of better alcohol policy, thousands of premature deaths and millions of disability-free life years lost could have been prevented but for the negative influence of the alcohol industry in LAC.

INTRODUCTION

Alcohol consumption is particularly high in Latin America and the Caribbean countries and territories (LAC). According to data from the World Health Organization's Global Health Observatory, Latin America's consumption of 6.5 liters of pure alcohol annually per capita makes it the third highest region in the world, after Europe at 10.1 and North America at 9.9 liters. However some countries within the region, such as Grenada and Saint Lucia, are higher at 9.5 and 10.6, respectively (World Health Organization [WHO], 2020). Total adult per capita consumption in Central and South America has increased over the past 40 years. In Brazil, which ranks among the largest beer producers worldwide, consumption has almost tripled since the 1960s.

Within this overall trend toward increasing alcohol consumption are two notable sub-trends – a significant decline in wine consumption and a considerable increase in consumption of both beer and hard liquor (Monteiro, 2007). In the Chilean market, for example, wine has been replaced by beer as the drink of choice, with per capita beer consumption increasing by 67 percent between 2005 and 2018 whereas consumption of wine decreased by 23 per cent during this same period (Statista, 2020).

Rising rates of alcohol consumption, as well as binge drinking patterns and drinking among young people have contributed to the increasing burden of disease and injuries in Latin America and the Caribbean. The harmful use of alcohol is a leading risk factor for death and disability in the LAC Region, particularly among males (Pan American Health Organization, 2015). Alcohol use is the leading risk factors for disability-adjusted life-years among men in Latin America (Degenhardt, Charlson, Ferrari, Santomauro et al., 2018).¹



¹ See Table 7 in Degenhardt, L., Charlson, F., Ferrari, A., Santomauro, D., Erskine, H., Mantilla-Herrera, A., ... & Rehm, J. (2018).

In part to address this problem, the World Health Assembly (WHA) adopted the Global strategy to reduce the harmful use of alcohol (WHO, 2010) in May 2010 (document WHA63.13). In 2011, the Directing Council of the Pan American Health Organization (PAHO) adopted a regional plan of action based on its framework (Document CD51/8, Rev.1)². The scientific support for the interventions highlighted in WHO's Global strategy and the regional plan is extensive, particularly with regard to pricing and tax policies, limiting the availability of alcohol, drink driving countermeasures, alcohol marketing effects, and treatment and early intervention. Many of the recommended interventions are population-based measures that restrict the affordability, availability, and accessibility of alcohol. Given their broad reach, the expected impact of these measures on population health is relatively high. For this reason, these measures have been prioritized in the form of the WHO (2019) SAFER recommendations on policies that are effective, evidence-based and in many cases inexpensive to implement.

During the past several decades, the alcohol industry has become increasingly active in the policy arena, including drink-driving, youth alcohol consumption and the prevention of illicit alcohol production (Bakke & Endal, 2010; Hawkins, Holden & McCambridge, 2012). By attempting to shape public policy, companies seek to create an industry-favorable regulatory environment, mitigate perceived risks while expanding their market to increase sales (e.g. SABMiller plc, 2014). At a press conference organized by the International Center for Alcohol Policies (ICAP) in October, 2012, 11 of the world's largest alcohol producers and two trade associations issued a list of "Commitments" to reduce underage alcohol use, strengthen self-regulatory marketing codes, prevent driving under the influence of alcohol, act responsibly in the area of product innovation, and encourage retailers to reduce harmful drinking (International Center for Alcohol Policies, 2012)³. At the same time a list of more than 3,500 "Industry Actions" were announced to demonstrate their intention to address harmful drinking in support of the WHO Global Strategy. More recently, AB InBev launched its Smart Drinking Goals, with a commitment to reduce harmful drinking by 10 per cent in six cities by 2020 and to invest \$1 billion in social marketing of low and no alcohol beverages.⁴

Such initiatives are often conducted under the guise of corporate social responsibility (CSR) activities, which are defined as business practices that help companies manage their economic, social and environmental impact (Babor & Robaina, 2013; Babor et al., 2018; Esser et al., 2016). These actions are frequently depicted as a way for it "to be part of the solution in combating harmful drinking" (www.iard.org). This strategy has been particularly effective in the context of the alcohol industry's strategic response to COVID-19, positioning themselves to be seen as essential to 'helping health systems' in an attempt to shift attention away from the role of alcohol in exacerbating health vulnerabilities (The IARD Editorial Team, 2020; ACT Health Promotion, 2020; NCD Alliance, 2020).

In light of growing concerns about the inherent conflict of interest (COI) in the promotion of public health measures by the alcohol industry, the objective of the present report is to document and critically evaluate the commercial and political strategies used by the alcohol industry to influence alcohol consumption and public health policy in the LAC region, and to better define the roles and the responsibilities of the alcohol industry and other stakeholders in areas related to public health policy.

2 See Plan of Action at http://www.paho.org/hq/index.php?option=com_docman&task=doc_view&gid=20295&Itemid=

3 In 2015, ICAP and the Global Alcohol Producers Group merged to form the International Alliance for Responsible Drinking (IARD), replacing ICAP.

4 For additional information on AB InBev's Smart Drinking Goals, see <http://www.ab-inbev.com/social-responsibility/smart-drinking/global-goals.html> and <https://www.ab-inbev.com/content/dam/abinbev/what-we-do/smart-drinking/landing-page/GSDG%20Double%20Website%2012.09.18.pdf>

METHODOLOGY

This report describes the commercial, Corporate Social Responsibility (CSR) and corporate political activities (CPA) of the alcohol industry in the LAC region. The source materials consist of industry documents, organizational websites, annual reports, industry trade journals, publicly available presentations, transcripts of calls and business meetings. Additional information was obtained from an extensive search of the world scientific literature including articles, reviews, editorials, commentaries, newspaper articles, books, book chapters, and unpublished documents. The search engine Google was used to obtain grey literature (i.e., unpublished documents and reports relevant to health issues) as well as industry documents. Key informants and experts were also contacted through listservs to inquire about unpublished work and ongoing research.

Appendix A describes the search terms used. This strategy was applied to a wide range of electronic and specialist databases, including a review of media reports. Information on specific campaigns and policies was also searched in this way. Authors also reviewed the literature on industry tactics, social responsibility programs and corporate political activity. Searches were conducted between April and July 2015 and between January and April 2020.

Organization of the Report

This report is divided into four sections. The introduction provides an overview of the alcoholic beverage industry and explains the implications of recent developments for public health. The second part describes commercial strategies, including targeting new customers, social and digital marketing, and retail methods designed to increase alcohol sales. The third section describes how the alcohol industry gains access to the political arena through CSR and CPA, and includes an impact assessment of the major alcohol policy areas: increasing alcohol availability; illicit and informal alcohol; marketing; labelling; pricing; and drink-driving. The final section draws conclusions and makes recommendations for the alcohol industry and other stakeholders.



“In the view of WHO, the alcohol industry has no role in the formulation of alcohol policies, which must be protected from distortion by commercial or vested interests.”

Dr. Margaret Chan, former Director General of World Health Organization (quoted in Gornall, 2013)

THE ALCOHOL INDUSTRY: AN OVERVIEW

The term “alcohol industry” includes not only the producers of beer, wine and distilled spirits and their network of distributors and retailers, but also related proprietors of local hospitality outlets and entertainment industries such as restaurants, clubs, hotels, tourism, and sports.

Tables 1 and 2 describe the structure of the alcohol beverage industry in terms of major producers, trade associations and Social Aspects/ Public Relations Organizations (SAPROs) that are funded to promote industry interests beyond the narrow focus on trade issues.

Producers

Among the most prominent representatives of the alcohol industry in Latin America and the Caribbean are the producers of beer, distilled beverages and wine. In the malt beverage sector, transnational corporations have concentrated the market by purchasing local companies and regional breweries, and by establishing local partnerships. In the last 15 years, the world’s largest brewers have expanded their acquisitions in Latin America. In 2016, AB InBev acquired SABMiller, having purchased Bavaria, the second largest brewery in South America prior to the merger. Other acquisitions include Heineken buying Fomento Económico Mexicano, S.A.B. de C.V. (FEMSA) (Mexico and Brazil), a Mexican multinational beverage and retail company, in 2010, and AB InBev’s subsidiary AmBev buying Cerveceria Nacional Dominicana (CND, with sales in the Dominican Republic and the Caribbean) in 2012 and the remaining 50% of Grupo Modelo in Mexico in 2013. Fomento Económico Mexicano, S.A.B. de C.V., doing business as FEMSA, is a Mexican multinational beverage and retail company. AB InBev is the world’s largest brewer. Its largest markets are in Mexico, Argentina and Brazil (Trefis Group, 2014). AB InBev and SAB’s joint portfolio of over 500 beers includes seven of the top 10 global beer

Company	% of market share
Anheuser-Busch InBev NV	57.2
Heineken NV	17.3
Cervejaria Petropolis SA	4.4
Cia Cervecerias Unidas SA	2.9
Empresas Polar CA	0.9
Cerveceria Centroamericana	0.8
Diageo Plc	0.7
FeCoVita Coop	0.6
Grupo Peñaflor SA	0.6
Pernod Ricard	0.5

Table 1. Top 10 alcoholic drink companies in Latin America and the Caribbean

Source: Euromonitor International, 2020

brands and 18 other brands that together generate more than US\$ 1 billion in retail sales (Gerrard, 2017). According to the AB Inbev 2019 Annual Report, LAC is responsible for 48.7% of volumes, 41.5% of revenues, and 44% of gross profits (AB InBev, 2020a).

The beverage industries in the Antilles are not as well established as those in Brazil, Mexico or the Southern Cone, but they are rapidly developing. One of the largest beer players in the Caribbean is Carib Brewery (owned by the conglomerate ANSA McAL) with breweries in St. Kitts & Nevis, Grenada and Trinidad. Heineken is the majority shareholder of Winward and Leeward Brewery Limited in Saint Lucia, Desnoes & Geddes Ltd in Jamaica, and Commonwealth Brewery in the Bahamas. In Haiti, Prestige beer, produced by the Heineken-owned Haitian National Brewery (Brasserie National d'Haiti), has 98% of the market share.

Wine production, on the other hand, remains decentralized in many LAC countries, with close to a thousand commercial wineries in Argentina alone. Traditionally a family business, big corporations such as Kendall-Jackson from California, Moët & Chandon and Lafite-Rothschild from France, and Freixenet from Spain, have recently been investing in the country's wine industry. Two corporations, Grupo Peñaflor and Fecovita, account for nearly 40% of the wine production and 55% of exportations (Lopez Roca, 2019). In Chile, companies like Robert Mondavi and Brown-Foreman began purchasing wine growing land and buying into existing vineyards in the 1990s (Promar International, 2000). Argentina and Chile rank as the 5th and 6th largest producers and the 10th and 5th largest exporters of wine in the world, respectively, out-competing countries such as Australia South Africa and New Zealand (World Factbook, 2019). Growth in the wine industry has also benefited the tourist industry in the region (Anderson et al., 2003).

The largest foreign spirits companies, Diageo, Allied Domecq, Brown Foreman and Seagram, import premium and budget-priced spirits through domestic subsidiaries. For example, in 2013 LAC accounted for 32% of Diageo's earnings (Diageo plc, 2013), particularly for Johnnie Walker. Mexico and Brazil ranked 4th and 10th for the largest Scotch Whiskey export destinations in 2018 (Scotch Whisky Association, 2018). In Barbados, Rémy Cointreau is the largest shareholder of Mount Gay Distilleries, Ltd., whose Mount Gay Rum is sold in 100 countries.

On- and off-trade vendors

In many LAC countries, *tenderos* (or small retailers) account for the majority of alcohol sales (SABMiller plc, 2014). In other countries, consumers generally shop in large retail outlets as opposed to small supermarkets. For example, in Mexico, Superama (Walmart) is the leading operator in the hypermarket and superstore sector, accounting for almost half of all alcohol sales with its Supercenters and Bodega Aurrerá stores. Leading convenience store chains include OXXO (owned by FEMSA), Extra (part of the Grupo Modelo beer producer), and 7-Eleven. The latter operates around 5,250 stores in Mexico alone, including around 4,300 Modelorama liquor stores. With the expansion of grocery retail chains and convenience stores, the number of off-license places where alcohol is sold is increasing in many countries of the region.

OXXO is the largest and fastest-growing chain of small convenience stores in Latin America, with more than 18,000 stores in Mexico alone. In 2012, the Mexican government gave FEMSA's OXXO approval to be open 24 hours a day and to sell beer all night long—despite a law prohibiting alcohol sales after 21:00 hours (9:00 PM) (Ley General de Salud, Cap. 7, Art. 25). Grupo Modelo, which produces Corona, also distributes its beer through a chain of convenience stores owned and operated by Modelo: Modelorama. This popular chain only distributes Modelo products. According to the company, “we increased the availability of the Grupo Modelo products in more points of purchase, including a larger number of Modeloramas, with which we contribute to the growth in beer sales all over the country” (Grupo Modelo, 2012).




	 BEER	 LIQUOR	 WINE
Largest Producers (parent company)	AB InBev/AmBev Backus (AB InBev) Bavaria (AB InBev) Brasil Kirin (Kirin) Carib Brewery Cerveceria Nacional (AB InBev) Compañía Cervecerías Unidas (CCU) (Heineken) Desnoes &Geddes (Diageo) Empresas Polar FEMSA (Heineken) Grupo Modelo (AB InBev) Quilmes (AB InBev) SABMiller (AB InBev)	Allied Domecq Barceló Export Import, CxA Brown Foreman Diageo Mount Gay Rum Distillery (Rémy Cointreau) Myer Rémy Cointreau Seagram Varela Hermanos Pernod Ricard Groupe	Bodegas Esmeralda Catena Zapata Errázuriz Peñaflor Viña San Pedro
Trade Associations	Asociación Nacional de Fabricantes de Cerveza Caribbean Breweries Association (CBA) CervBrasil Cerveceros Latinoamericanos Dominican Association of Beer Producers (ADOFACE) National Union of the Beer Industry (SINDICERV)	Asociación de Productoresy Importadores de Bebidas Alcohólicas de Centroamérica (APIBAC) Asociación Colombiana de Importadores de Licores (ACODIL) Jamaica Alcoholic Beverage Association (JABA) Jamaica Rum & Spirits Trade Association (JRASTA) West Indies Rum and Spirits Producers' Association Inc. (WIRSPA) Dominican Association of Rum Producers (ADOPRON) Instituto Brasileiro da Cachaça (IBRAC) Representatives of Liquor Importers (RIVLAS)	Corporación Vitivinícola Argentina (COVIAR) International Trade Federation of Wine and Spirits (FIVS)
Social Aspects Public Relations Organizations	International Association for Responsible Drinking (IARD) Foundation for Social Investigation (Fundación de Investigaciones Sociales, A.C. – FISAC) Fundación CorResponsable Fundación APROCOR Trinidad & Tobago Beverage Alcohol Alliance (TTBAA) SindCerv Núcleo pela Responsabilidade no Comércio e Consumo de Bebidas Alcoólicas no Brasil		
Research	Centre for Information on Health and Alcohol (CISA) – Ambev and Heineken (support) Facultad Latinamericana de Ciencias Sociales / FLASCO		
Other organizations receiving industry-funding	Fundación Pro Humanitas Fundación Proyecto Padres		

Table 2. Structure of the alcoholic beverage industry in Latin America and the Caribbean

Trade Associations and SAPROS

Trade associations represent alcohol industry interests to the media, the public and the government. Within LAC, trade associations are well developed, bringing together industry members to advance common interests. The largest of these is Cerveceros Latinoamericanos, which represents brewers from 18 countries around the region. The association plays a key role in engaging governments in Latin America in the discussion around noncommunicable diseases (NCDs) related to harmful use of alcohol and also sponsors activities to reduce alcohol-related harm. Other such regional associations include Asociación de Productores e Importadores de Bebidas Alcohólicas de Centroamérica (APIBAC – Central America) and the Caribbean Breweries Association (CBA). Trade associations for each sector (wine, beer, spirits) also exist at the country-level. For example, within Argentina there is Bodegas de Argentina (for wine producers), Cámara de la Industria Cervecería Argentina (for beer producers) and Cámara Argentina de Destiladores Licoristas (for liquors and distilled beverages).

As the name suggests, Social Aspects/ Public Relations Organizations (SAPROs) manage issues that may be detrimental to the alcohol industry (Babor and Robaina, 2013; Anderson, 2004). For example, the Trinidad & Tobago Beverage Alcohol Alliance (TTBAA), according to one of the organization's members, "was borne (sic) in response to two anti-alcohol pronouncements – one by the World Health Organization, the other, resident here in Trinidad and Tobago by our own public policy officials." Its statement of purpose indicates it is concerned with the effect of WHO activities on the industry. Other active SAPROs operating in the region are the International Association for Responsible Drinking (IARD, formally known as the International Center for Alcohol Policies, or ICAP), Fundación CorResponsable in Venezuela, the Fundación de Investigaciones Sociales A.C. (FISAC) in Mexico, and the Association for Responsible Alcohol Consumption (Aprocor) in Chile, which claims to have the support of WHO (Fundación Aprocor, 2016).



Trade associations represent alcohol industry interests to the media, the public and the government. Within LAC, trade associations are well developed, bringing together industry members to advance common interests. The largest of these is Cerveceros Latinoamericanos, which represents brewers from 18 countries around the region.



Beer crates In the Amazon - downriver from Iquitos

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Comments

The alcohol industry broadly conceived is a coalition of organizations and related industries that contribute to the production, distribution, sale, and promotion of alcoholic beverages. Although this group of industries and organizations is by no means monolithic, they often act in concert to promote common interests in the LAC region and within individual countries.

LAC has been identified by the industry as having high potential for growth because of increasingly stable economies, growing income levels, and a large youth population, which is a very favorable demographic characteristic as most alcohol consumption occurs among adults 30 years of age and younger. As summarized during a Diageo (Diageo, plc, 2019) "Presidents Call": (1) there are an estimated 7 million new legal purchase age (LPA) consumers each year; (2) the number of middle-class households is rapidly increasing; and (3) the increasing number of consumers able to afford premium brands is "expected to grow".

The global concentration of the alcohol industry into a small number of large transnational alcohol corporations has increased the industry's capacity to act both individually and in concert to influence decision-makers at the national, regional, and local levels in the LAC region (Jernigan, 2009; Jernigan & Babor, 2015). As discussed later in this report, market expansion by international producers of alcoholic beverages is likely to result in increased political influence and higher profits resulting from economies of scale that allow greater expenditures on marketing, especially in emerging markets.

Other industries and organizations acting in concert

In addition to the producers, trade associations and SAPROs, the alcohol industry often acts in concert with industries that profit from trade in alcohol, such as the hospitality, hotel, travel, restaurant, and advertising industries.

The alcohol producers also provide funding to research organizations for marketing research and scientific studies (e.g., Centre for Information on Health and Alcohol (CISA); Facultad Latinoamericana de Ciencias Sociales / FLASCO) and philanthropic foundations (e.g., Fundación Pro Humanitas; Fundación Proyecto Padres) which conduct Corporate Social Responsibility activities.

COMMERCIAL STRATEGIES

A significant amount of revenue from the alcohol industry is spent on marketing and promoting alcoholic beverages. *Advertising Age's* (2016) list of the top 100 global advertisers in 2015 includes five alcohol companies operating in the LAC region. At least six commercial strategies are worthy of investigation from a public health perspective: targeting women and young people, premiumization; product innovations and packaging design; use of social media and digital marketing; activities to increase the number of occasions for drinking; and sponsorship of sports events and other activities.



Promotion of alcohol to selected target groups

Young people and women are mentioned in numerous documents as a key growth sector for the alcohol industry and a demographic category of strategic importance (see Euromonitor International Ltd. country reports). The average age of consumers in Latin America is lower than that of other countries such as in North America and Western Europe. In Mexico for example, there are 63 million potential drinkers and a million more reach the legal drinking age each year. Despite industry claims that marketing is only used for brand-switching and capturing market share, a significant body of research points to a consistent link between alcohol marketing and initiation among young people, and increased alcohol-related problems (Anderson et al., 2009; Austin, Chen & Grube, 2006; Jernigan, Noel, Landon, Thornton, & Lobstein, 2017; Noel, 2020; Smith & Foxcroft, 2009). The cumulative evidence supports the conclusion that the association is causal (Sargent and Babor, 2020).

As more women join the organized workforce and obtain financial independence, women are seen by the major alcohol producers as a consumer group that could increase sales (Euromonitor International Ltd., 2016b). “Understanding the female opportunity” and developing marketing programs specifically for women are key components of Diageo’s strategy in LAC (Diageo plc, 2012). SABMiller’s 2015 Latin America Divisional Seminar presentation outlines initiatives targeting women in the region (see “Romancing core lager—appealing to women” slides⁵). These include “developing rituals to make drinking beer more special,” by introducing new products and mixed-gender marketing (also termed 360-degree marketing) (Pfanner, 2007; SABMiller plc, 2010b). This effort to recruit more women drinkers is not limited to LAC.

Premiumisation

The industry also looks to the region’s emerging middle class for growth, based on “growing aspirations of middle-income consumers” and wealthy consumers (SABMiller plc, 2015; The Heineken Company, 2012; Diageo plc, 2019). As described in “Premiumization in Latin America,” a film created for SABMiller’s investor seminar, the “premiumization opportunity is not limited to highly affluent segments ... but exists along the spectrum of society at different levels of pricing” (SABMiller plc, 2015a). The company’s premiumization strategy resulted in over US\$ 900 million in gross sales income during 2014 (14% of net revenue).

Diageo’s Johnnie Walker, which targets the growing middle class in many emerging markets, has been very successful. The brand’s “striding man” logo, with the tagline “keep walking” plays on nationalism, aspiration and pride. According to the brand’s webpage (johnniewalker.com), “the Striding Man would quickly become recognizable around the world as a pioneer of international branding and an icon of personal progress.”

Volume growth in Mexico is partly attributed to the emergence of premium brands that are “strongly followed by young Mexican consumers who aspire to consume them” (Euromonitor International Ltd., 2015b). Data from Peru and Chile also indicate increased consumption of premium products (Euromonitor International Ltd., 2015c; United States Department of Agriculture Foreign Agricultural Service, 2010).

Product innovation and packaging design

Targeting also occurs through product innovation and product design. According to Euromonitor International Ltd. (2015b; 2015d; 2015e; 2015f; 3016b), high-strength premixes, and more significantly, spirit-based ready-to-drink products (RTDs) have contributed to total volume growth over the past several years in many LAC countries. Sweet ready-to-drink alcohol products appeal to women and young people, particularly underage drinkers, who do not always detect the alcohol content (Choice 2008; Copeland et al. 2007). **Table 3** provides a sample of new products and product innovations in LAC for 2014–2015.

AB InBev introduced MixxTail Mojito in Argentina and Skol Beats Senses in Brazil, a citrus-flavored product “designed to meet consumer needs for a sweeter, high-alcohol liquid in an attractive modern package.” Both are targeted at “the night-out occasion” (AmBev, 2014). In Uruguay and Colombia, the success of RTDs is credited to Diageo’s Smirnoff Ice, a brand very popular among young consumers since it is drunk during parties and at clubs (Euromonitor International Ltd., 2015d, 2015f). In some countries (i.e., Bolivia, Honduras, Mexico), unit prices for these products are the lowest among alcoholic drinks and are therefore more affordable for young drinkers, according to market research (Euromonitor International Ltd., 2015b, 2015g). In 2007, SABMiller introduced Redd’s to Colombia, a fizzy cider-like malt beverage aimed specifically at women. Redd’s is sold in 5- or 10-packs shaped like a woman’s purse (Pfanner, 2007).

5 Presentation can be viewed at <http://www.sabmiller.com/docs/default-source/investor-documents/divisional-seminars/2015/latin-america-divisional-seminar-june.pdf?sfvrsn=0>.

COMMERCIAL STRATEGIES

Brand	Producer	Beverage typea	Description
51 Ice Sensações	Cia Müller de Bebidas	RTD	New flavor for brand; citrus and spicy
88 Limão	Vitivinicuola Cereser SA	S	A light cachaça with lemon added, in line with trend of young consumers
Absolut Karnival	Pernod Ricard	S	Vodka flavored with passion fruit and orange blossom; limited edition celebrating carnival in Latin America
Aguardiente Antioqueño	Fábrica de Licores y Alcoholes de Antioquia	S	Special edition featuring the singer Silvestre Dangond and his song "El Glu Glu," primarily sold in clubs
Aguardiente Blanco	Industria de Licores del Valle del Cauca	S	Commemorative bottle shaped like a football in celebration of the 2014 World Cup
Bacardi wines	Bacardi-Martini	W	Three new sparkling wines launched to expand premium portfolio
Bacardi Big Pineapple	Bacardi-Martini	S	"Easy to drink," advertised as only needing lemon soda and ice
Becker Grado 7	AB InBev	B	Higher alcohol content (7%) beer targeted at younger, price-conscious consumers (e.g., students)
Brahma 0,0%	AB InBev	B	Alcohol-free beer that tastes like regular beer
Casa Secrets	Comercializadora Friends México SA de CV	W	Sparkling wine in a metal tin can
Flor de Caña	Cía Licorera de Nicaragua SA	S	Existing brand packaging changed: now comes in slender bottle, "more modern looking for a younger audience"
Jack Daniel's Tennessee Honey	Brown-Forman	S	Targets young consumers who tend to prefer sweet beverages, as well as women
José Cuervo Tradicional Limited Ed. World Cup 2014	Casa Cuervo SA de CV	S	Bottles decorated like the Mexican national soccer team uniform; limited edition
Kaiser Radler	Heineken Brasil	B	Targets consumers who do not appreciate the taste of beer or prefer a lighter version
Le Calvane	CI Augusta Import Export SAS	W	Aimed at integrating Italian wine in the Colombian market, where it is currently largely unknown
Skol Beats Senses	AB InBev	B	Beer-based drink that can be consumed with ice. Targeted at "those who enjoy the night and are seeking new experiences"
SKYY	Campari do Brasil Ltda	S	Limited edition of its bottle featuring the Brazilian flag, launched for the International Soccer Association (FIFA) World Cup

Table 3. Examples of new products introduced into the Latin American and Caribbean countries, 2014–2015

B = beer; **RTD** =Ready to Drink; **S** = spirits; **W** = wine

Source: Euromonitor International Ltd., 2015a

Additionally, many brands are increasingly available in 12-packs (with the largest size previously having been 6-packs). Others (e.g., Águila) are now sold in larger 750ml bottles to encourage a 'sharing culture' and to offer low-income consumers a more affordable option. According to SABMiller, as "80% of the population in our operating countries is in the lowest two income levels, and for them beer is still an expensive choice", their solution has been to promote a "smarter, more affordable way to buy a beer". The 750ml bottle of Águila beer is said to "provide great value for money, particularly when shared amongst friends". Bulk packaging sale tactics were used in Colombia, Honduras and El Salvador (SAB, 2014). In 2018, AB InBev introduced two beers made with local cassava—Nossa and Magnifica—as part of their 'affordability initiatives' (AB InBev, 2019, p4). The beers are offered at significantly lower price than other brands. Such portfolio expansions are crucial for growth in emerging markets (AB InBev, 2019).

Increasing the number of drinking occasions

While the industry maintains that marketing activities are not designed to increase alcohol consumption, it is clear that the industry has a vested interest in increasing the number of occasions in which its products are consumed, and increasing the number of consumers. Barry Smith, SABMiller's vice-president for Latin America spoke to an industry trade journal regarding the drive to increase the average consumption of

beer. For Peru and Columbia, where consumption is low "by Latin American standards", and most drinking takes place on the weekends, he explained that "The objective is to increase the frequency but not the intensity of drinking" (Planting, 2010). This was reiterated when Karl Lippert, President of SABMiller Latin America, explained how the company is working to get people to drink beer with meals at home in an effort to boost sales in Latin America: "The highest potential opportunity here is with meals at home." He continues: "As we look to expand the beer category in Latin America, we plan to have an attractive beer choice for everyone, for men and for women, while having dinner with friends, relaxing at home, or out in a sophisticated high-end club. This plan to grow beer volumes involves selling beer in larger "more affordable" packs, appealing to women, "promoting easy-to-drink beers", and "working to get people to drink beer more frequently through creating weekly events and offering discounts." (Chaudhuri, 2015).

In **Colombia**, Bavaria (owned by AB InBev) established National Friends Day, or Día de los Amigos Poker (Poker Beer Friends Day), positioning Poker brand beer as the "beer of friendship" (Grand Effie, 2019). During the original campaign, the Poker brand Facebook page grew by 11% (Publicidad & Mercadeo, 2014) and sales for participating retail outlets increased by 19% (Publicidad & Mercadeo, 2014). Navigating around recent advertising restrictions, 'Amigos de Whatsapp' was launched on the country's most popular social media app in 2018, resulting in a 12.5 per cent increase in two months (Grand Effie, 2019).

The poster is a promotional graphic for a weekly event. At the top left is the 'Organik BOULEVARD' logo. In the center, a group of five young adults (three women and two men) are smiling and posing. Below them, the text reads 'LOS JUEVES DE PATAS!' in large, stylized letters, followed by 'EN ORGANIK SON CHEVERES'. At the bottom, it says 'HORA LOCA Y INGRESO LIBRE PARA TODOS'. On the right side, there's a logo for 'JHONATAN LOBATO SHOWMAN'. The background is dark green with a large, faint 'Organik' watermark. At the very bottom, a row of logos for various brands is shown: Cristal, Pilsen, Corona Extra, Red Bull, Johnnie Walker, and Absolut Vodka. The date 'JUEVES 20' is written in large white letters at the top right. A red ribbon with a gold bell is at the top center.

Similarly, in **Peru**, the company created Jueves de Patas (or Friends' Thursday), which "encourages consumers to catch up with friends for an affordable weekday Pilsen Callao beer outside the home." The campaign is promoted across multiple types of media and the offering of prizes and incentives to consumers and participating on premise locations (SABMiller plc, 2015). 'Bring Back your Buddy' (Trae a tu Pata), a recent extension of the original campaign helped to increase sales by 18 percent.⁶

Social media and digital marketing

Digital marketing has become increasingly common in the LAC Region. Marketing activities are designed to integrate the product into consumer and societal lifestyles, and can therefore be targeted to specific audiences. Additionally, there are no regulations regarding the time of day; and in many countries in LAC (e.g., Mexico), rules that do not allow minors to enter the websites of companies producing alcoholic drinks are not a legal requirement. As such, nearly all producers and brands in the region have some type of online presence, with many using multiple social media channels (i.e., Facebook, Foursquare, Instagram, Twitter, YouTube).

Websites and social media are used to encourage personal interactions with a brand in various ways, including interactive games, sharing messages, images, videos, and links to other websites. Skol, a major Brazilian beer brand produced by AmBev (now AB InBev), had a website (www.skol.com.br/skoland) that allowed the viewer to create a user profile and join 'Skoland'. Once registered on the website, any actions

related to the brand, such as a share on Facebook or a comment on a YouTube video, turned into points. Points could be redeemed for prizes and discounts on Skol events and products. In 2013, the brand faced criticism for promoting their beer-flavored ice cream on Skol's Facebook page with the tagline, "Shall we go to the bar to have an ice cream?" Since then, Skol has been especially active in other, more interactive social media. In a Twitter post, an interview during Carnival with a group of girls ends up with one of them asking on air for an internship. The platform encourages viewers to retweet the post, using **#SkolMeDáUmGiro** in order to assist the young woman to find her a job. Another example was a campaign in Instagram (Skoldogz) which, in a series of communications, had the public post pictures and videos of their dogs. One of the posts (a video ad showing dogs barking to have the beer) had more than 1 million views.

Carib Beer's social media campaign, *Pass D'Carib* (www.PassDCarib.com), consists of videos uploaded by fans showing them passing a Carib Beer to friends around the world. Participants earn a free case of beer and a chance to win a "dream vacation for four". "With our new *Pass D'Carib* campaign we are encouraging Carib's global family of fans to connect with one another, and our brand, in a fun and engaging manner," said Derrek Waddell, Managing Director of Carib Beer. The objective of the *Pass D'Carib* campaign is not only to increase "fan interaction", but also to expand the brand's visibility throughout the region, North America and the rest of the world. As explained by Jason Inasi, President and CEO of Factory Interactive—the marketing agency behind the campaign, "Our goal is to bring fans of Carib Beer together while raising awareness in new markets" (Marketing Weekly News, 2010).

Whereas many websites are directed at youth, other brand websites are targeted at the emerging middle-class, young professionals, and more sophisticated and mature consumers. For example, Pernod Ricard's premium Scotch whisky Chivas Regal entered into a multi-year partnership deal with Mana, the biggest Latin rock band in the world, who exemplify "what success, friendship and generosity mean for the modern gentleman," according to the Brand Director of Chivas. Through interactive digital and social media platforms like chivasregalus.com, fans can watch exclusive documentary style videos and win prizes, like dinner with the popular band (Pernod Ricard, 2013).



⁶ For information on this campaign, see <https://thebrandgym.com/brilliant-brand-activation-from-pilsen-callao>

Sponsorships

Sports and cultural events, particularly those with appeal to young people, are widely sponsored by alcohol brands. Sponsorships provide a direct way for the alcohol industry to promote their products, and to create a positive, even emotional, relationship between the brand and consumers. Loyalty and personal brand connections contribute to ongoing purchases. Sponsorship includes sports events and teams, youth events, concerts, and celebrations. While Guatemala and Costa Rica have banned sponsorship in sports and youth events, other LAC countries have only partial restrictions, or none at all.

Sports

Sporting events attract substantial audiences, particularly young men, who are the heaviest consumers of alcoholic beverages. By sponsoring games or a team, the industry is able to build the brand name into the event's publicity including sports commentaries, signage on clothing, and products sold to fans. According to one producer, "promotions and sponsorships in soccer, baseball, boxing and wrestling are particularly significant." (Grupo Modelo, 2012). SABMiller's Águila, known as 'the celebration beer', has sponsored the **Colombia** national soccer team in every category for over 15 years. Speaking of the 2014 FIFA World Cup, the President of the company's Columbia-based unit stated, "Please let them do well." "That would be fantastic for per capita consumption for sure." (Bristow, 2014).

In an initiative for Brahma beer in **Brazil**, referred to as their "soccer platform," AB InBev established partnerships with 9 local teams in the region and set up fan pages on Facebook "in order to find new ways to constantly and consistently engage with the fan base, enabling us to build more and more loyalty over time." This resulted in Brahma having the best volume performance in the region, according to CEO Joao Castro Neves (AmBev, 2012).

The largest and farthest reaching industry-sponsored sporting event is the FIFA World Cup. Hosted by Brazil in 2014 and sponsored in part by AB InBev, the games were attended by nearly 3.5 million fans and another billion watched the final game on television. Within **Brazil**, a "multidimensional experiential platform" consisting of 15 major programs and over 9,000 activation points was used for promotion of three brands: Budweiser, Brahma and Skol. The company also ran over 80,000 events in 700 cities across the country, reaching more than 15 million people, according to transcripts from the company's 2014

earnings call. Additionally, over 23 million Brazilians were engaged through social media and over 5 million special edition Budweiser and Brahma cups were sold. In the nine months following the event, beer industry volumes for Brazil rose by 6% (AB InBev, 2014).

Additional World Cup 'activations' for local brands took place in other LAC countries: In **Argentina**, promotions for Quilmes included multipacks, limited-edition cans and numerous social media campaigns. In Mexico, AB InBev's Corona activation led to the redemption of 3.4 million special promotional codes in over 100 million digital connections. Jose Cuervo, a tequila produced by Diageo, ran a three year campaign sponsoring the Mexican National Team leading up to and through the 2010 World Cup. The campaign's slogan, 'Mexico, You Always Have It On', is a metaphor referring to the team's jersey and to the fact that one always wears one's culture: "Like the Mexican National Team, Jose Cuervo Tradicional symbolizes honor and pride, as well as a rich, winning tradition." In June 2018, Carib Brewery signed a three year partnership with Trinbago Knight Riders as the Official Beer of the team (ANSA McNAL, 2018).

During the 2018 Formula 1 race in Mexico, Diageo provided over 200,000 people with samples of Johnnie Walker through "four Johnnie Walker rooms, 22 Johnnie Walker bars and other bespoke events" (Gavazzi, 2018). The "striding man" was the highest trending hashtag on Twitter over the course of event.

Festivals, events and other drinking occasions

Sponsorship of festivals and other public events may influence the frequency and volume of drinking and contribute to the social acceptance of alcohol as part of the culture and society. As described in one producer's annual report (Heineken, 2014):

Piton Beer continues to weave its way into many facets of St. Lucian society. An annual carnival cannot be imagined without Piton Beer, where limited edition labels to commemorate this event have been presented without fail, in addition to sponsorship of carnival bands and community carnivals to name a few. Piton Beer was present at the River Limes, the Mothers and Fathers celebrations, the community weekends, the barbecues, the cricket games, and also other major celebrations such as Independence and Jounen Kweyol.

In Sao Paulo. **Brazil**, street Carnival has become a larger event every year. In 2020, Ambev won the rights to sponsor this event investing more than \$5 million USD. The agreement established that Ambev was responsible for organizing the route of the parade and, for this reason, would be the only company to sell beer and to display marketing materials in the streets and in other places. According to AB InBev (2012), such events are “important volume drivers” in Brazil, particularly for Skol and Antarctica, two brands known to be popular among youth (Vendrame, Pinsky, Souza e Silva, & Babor, 2010).

Music has been described as one of the most important tools in modern marketing (Brown & Volgsten, 2006). The first Rock in Rio in 1985 was sponsored by the beverage company Cervejaria Brahma, which paid \$20 million to introduce its new beer, Malt 90, to Brazilian youth. A partnership with Heineken Brasil has been in place since 2004. In return, Rock in Rio delivers a year’s worth of branding, or “brand communication experiences” and gains access to a broad audience, according to an article in Forbes, as the festival is designed to attract a variety of demographic groups and a wide range of ages. The Rock in Rio festival is one of the largest music festivals in the world. Seventy-five percent of attendees are aged 15-50 (Blatt, 2014). Other popular industry-sponsored events include Quilmes Rock Festival in **Argentina**, Dream Weekend in **Jamaica**, and Corona Festival in **Mexico**. There are also many reports of the industry sponsoring parties in the region. In Jamaica, the promoters of these parties did not begin requiring identification to prove that people were 18 until Christmas 2012.⁷

Comments

Marketing, sponsorships, and product design

The activities described above, often in the words of representatives of the major producers, indicate how the industry’s pricing, marketing, sponsorship and product design activities could contribute to the on-going recruitment of young people, women and other vulnerable populations, broaden the scope of the drinking population in emerging markets, and increase consumption through the promotion of more frequent drinking occasions. In the area of pricing, the industry practices a two-pronged approach of making some drinks cheap enough for low-income consumers to afford and by promoting them as such, while at the same time promoting premium brands as status symbols for the emerging middle class. Some evidence also suggests that discounts offered on bulk-packaging (volume-based price discounting) induces people to buy larger-volume packages of beer and may lead to increased overall beer consumption (Bray, Loomis, & Engelen, 2009).

Products are increasingly being designed to maximize alcohol consumption within certain target groups (called market segments) that may be particularly vulnerable to alcohol-related harm (e.g., youth and women). While the industry claims that its aim is to increase only the frequency of “responsible” drinking, epidemiological studies from the region (Medina-Mora et al., 2000; Pinsky et al., 2010) show that the frequency and intensity of drinking beer are highly correlated. This suggests that the net effect of increasing the number of occasions for drinking would be to increase the number of occasions for heavy drinking as well. In concert with sales data reported by the industry, the development of new products that are consumer-friendly and inexpensive is likely to increase alcohol consumption.

Alcohol marketing is a particular concern in light of evidence of a causal association between exposure to advertising and the early onset of drinking and drinking problems (Sargent and Babor, 2020). To the extent that the alcohol industry’s marketing activities play an important role in defining the environment in which people learn and practice harmful drinking patterns (Babor & Robaina, 2016; Babor, Robaina, & Jernigan, 2015a, 2015b), expenditures on alcohol marketing may be particularly effective in developing countries, which have not yet become saturated by advertising (Babor et al., 2010). A review of internal documents (Hastings, 2009) obtained from industry sources in the UK, which included several large transnationals also operating in LAC, concluded that young people are a

⁷ See news story at http://www.jamaicaobserver.com/news/JABA-extends-party-ban-on-underage-drinking_13203002

“key target” for alcohol advertisers. Young people and women are not only being targeted through traditional and new forms of marketing, but also through the design of new beverages and packaging by the major producers. According to one company’s annual report (Heineken, 2014), “Innovations will remain an important focus area moving forward in order to increase consumer demand over the mid to long term.” (p12). Also reported was the belief that these measures affect sales: “Our innovations, specifically Strongbow Gold, Desperados, the expanded Royal Club range and latterly the Piton Radler have had a positive impact on domestic volumes.” (p 8).

Most of the research attention in this area has been devoted to studying the impact on youth drinking of traditional modes of advertising through the mass media such as television, radio and magazines. More recent research (Carah et al., 2018; Lobstein, et al., 2017) on the effects of marketing using the digital and social media suggests an even greater impact. Latin America has the fastest-growing internet population in the world and includes five of the world’s top 10 most social-media-engaged markets (Brazil, Mexico, Argentina, Colombia, Peru and Chile, respectively), with 85% of the population participating regularly in social media and 90% having a smartphone (ComScore, 2016).

Alcohol marketing on digital media platforms is increasingly integrated with both the promotional and logistical capacities of platforms like Facebook, Instagram and YouTube, which are among the largest advertiser-funded media companies in the world. These platforms provide a way to identify consumer preferences, expose consumers to targeted messages, and convert those messages into purchases. Lobstein et al.’s (2016) review of studies examining the commercial use of digital media by alcohol marketers found that exposure to digital alcohol marketing was associated with higher levels of drinking and that marketers were using platforms to encourage consumer engagement and to undermine current regulatory codes.

Another marketing strategy is the sponsorship of sports, music and cultural events, which seeks to incorporate alcohol brands and products into the national culture and into the enjoyment of leisure activities (Klein, 2000). Quasi-experimental studies have demonstrated that music can increase alcohol consumption (Drews et al, 1992), particularly louder music (Guéguen et al, 2008), and that which has a faster tempo (e.g., Skol Beats) (McElrea & Standing,

1992). A systematic review concluded that there is a positive association between exposure to alcohol marketing and alcohol consumption, supporting previous findings (Brown, 2016).

Alcohol sponsorship is also associated with heavier drinking by individual players, teams and clubs (O’Brien & Kypri, 2008). This is particularly true for university sports sponsored by the alcohol industry –among university sports in the UK, those receiving alcohol industry sponsorship were four times more likely to report hazardous drinking than non-sponsored sportspeople (O’Brien, et al., 2014). Grupo Modelo’s 2011 annual report credits the sponsorship of the ATP World Tour and the launching of Corona Light, which included initiatives in social networks, for the company’s success in Chile, one of the countries that registered highest growth. These reports indicate that the alcohol industry’s strategy to expand the frequency and volume of alcohol consumption has met with some success.

The potential for sports sponsorship and related measures to impact hazardous drinking was explored in Brazil in connection with University student sports clubs (USSCs). A study by Pinsky et al. (2017) that covered all the USSCs in the city of Sao Paulo found that 88% of them had written contracts with breweries to have their sports events and parties sponsored, where most of the time, open bars (free alcohol events) were provided. Not surprisingly (attendees were students 17 to 22 years old) a range of alcohol harms occurred during and after the events. Newspaper reports described several cases of sexual violence, fights and even deaths.⁸ The Pinsky et al. study, published in 2017, had preliminary results presented to the press in 2015. Soon after that, the major Brazilian breweries announced their voluntary commitment to stop supporting Open Bar University events and in 2019, an official resolve was announced by one of their trade associations (Sindicerv, 2019).

Policies that limit exposure to advertising and other marketing can affect sales, consumption levels, and profits. This may explain industry lobbying to retain self-regulation of alcohol advertising and voluntary codes of marketing practices, as discussed in the next section of this report.

8 For example, see https://www.huffpostbrasil.com/2015/03/03/organizadores-de-festa-onde-morreu-estudante-da-unesp-tinham-lig_n_6792236.html; <https://veja.abril.com.br/educacao/medicina-da-usp-proibe-festas-e-bebidas-por-tempo-indeterminado/>; <https://veja.abril.com.br/educacao/o-que-esta-por-tras-da-violencia-dentro-das-universidades/>.

CORPORATE POLITICAL AND SOCIAL RESPONSIBILITY ACTIVITIES OF THE ALCOHOL INDUSTRY

In addition to its commercial activities, which are designed to promote its products, some segments of the alcohol industry act both directly and indirectly to create a favorable regulatory environment in which to operate.



Corporate political activities (CPA) have been documented and analyzed in many areas of business (see Getz, 1997; Hillman & Hitts, 1999; Savell, Gilmore, & Fooks, 2014; Shuler, 1996; Schuler, Rehbein, & Cramer, 2002). As shown in **Table 4**, the main political strategies are (1) an information/access strategy to gain access to political decision-makers and provide information; (2) a constituency-building strategy targeting political decision-makers indirectly through constituent support; (3) a policy substitution strategy to promote alternative policy or voluntary measures; (4) a financial incentive strategy in which companies provide incentives to influence government policy-makers to act in a certain way; and (5) a legal strategy employing pre-emption, litigation, or circumvention. Each long-term strategy includes a variety of tactics or short-term activities. For example, the formation of alliances and corporate-image advertising are tactics incorporated within the constituency-building strategy. Some of these tactics are used directly (e.g., lobbying, litigation, promoting self-regulation) in the political arena, whereas others are more indirect

attempts to create a favorable policy environment (e.g., formation of alliances with civil society organizations, support for research). These latter activities are often characterized as corporate social responsibility (CSR) efforts.

Access and information

According to the academic literature on this topic, gaining and maintaining access to those who decide public policy may be a company's single most important political goal (Hillman, Zardkoohi, & Bierman, 1999; Keim & Zeithaml, 1986; Schuler, Rehbein, & Cramer, 2002). Industry tactics used to gain and maintain access to political decision makers include placement of key personnel in positions of authority, partnerships with government agencies and civil society organizations, activities that shape scientific evidence, political lobbying, and reputation management.

STRATEGY	TACTICS
Access/Information	Direct and indirect lobbying (meetings and correspondence with policy makers) Shaping the evidence base (funding and dissemination of research, use of paid consultants, position papers, technical reports) Partnership/collaboration (working/advisory groups, technical support, advice) Reputation management
Constituency-building	Forming alliances with trade associations, other industry sectors Forming alliances with or mobilizing civil society organizations, consumers, employees and/or the public Creation of Social Aspects and Public Relations Organizations
Policy substitution	Develop/promote self-regulation Develop/promote alternative regulatory policy Develop/promote voluntary activities
Financial	Contributions to political party Hiring or offering future employment to people with political connections Other financial enticement (gifts, travel)
Legal actions	Pre-emption Litigation (or threat of litigation) Circumvention of laws and regulations

Adapted from Hillman & Hitts (1999) and Savell et al. (2014).

Table 4. Categorization and description of strategies

Placement of key personnel: Revolving doors and interlocking directorates

One form of corporate influence in the political arena that does not involve the exchange of monies, but rather people. Corporate employees can and do fill government positions. Conversely, former high-level cabinet members can be appointed to the boards of alcoholic beverage companies, passing in both directions through the “revolving door.” Thus, the alcohol industry can utilize the political contacts developed by these individuals while serving in the political arena. Corporate executives may also gain additional political access through interlocking directorates (i.e., when an individual affiliated with one company sits on or controls the board of another), adopting multiple roles and presenting potential COIs.

Andrónico Luksic, the richest person in Chile, is not only the owner of the country’s largest brewery, Compañía de Cervecerías Unidas (CCU), but also owns Banco de Chile and has a stake in television channel Canal 13 (El Mercurio, 2013). The former President of Panama, Juan Carlos Varela (2014–2019), was the owner of Varela Hermanos rum distillery. The former Vice President of FEMSA’s (Fomento Económico Mexicano) Corporate Affairs previously served as a Federal Congressman, Governor of the Mexican State of Zacatecas, head of the Mexican Social Security Institute, and a Senator of the Federal (FEMSA, 2014). The former CEO of FEMSA, Vicente Fox, became President of Mexico in 2000. The Consejo Mexicano de Hombres de Negocios, or Mexican Council of Businessmen, is a little known organization comprised of thirty of the most influential businessmen in the country, including representatives from both FEMSA and Grupo Modelo. The group has direct access to cabinet-level government officials and meets with the president annually.

The chairman and CEO of FEMSA, José Antonio Fernández Carbajal, was Chairman of the region’s largest private university, the Institute of Technology and Higher Education- Monterrey. Due to its size and wealth, ITESM exerts significant political influence (Instituto Tecnológico y de Educación Superior de Monterrey, 2012; TecReview, 2018). Additionally, nine other directors or alternate directors of FEMSA are also members of the Board of Directors of ITESM. These strategic alliances can be considered normal business practices. Nonetheless, they can also have an effect on the way in which government officials relate to the policy priorities of the alcohol industry.



Lobbying

Lobbying has been identified as a key strategy used by the alcohol industry, particularly to oppose tax increases (Bakke & Endal, 2010; Collin, Johnson, & Hill, 2014; Hope, 2006; OpenSecrets, 2015; Thamarangsi, 2008). The most common arguments used by the industry are summarized in a press release issued by SABMiller following an unsuccessful attempt to prevent tax increases in **Colombia**: “Bavaria and SABMiller made every effort to inform the government of the significant implications of such a high increase in the VAT rate. We do not believe that the wider implications were fully considered.” The press release suggests that the tax increase will make smuggling more attractive, put over 10,000 jobs at risk, undermine the country’s reputation among potential investors, and result in lower tax revenue for the government. “SABMiller, as Bavaria’s holding company and to date one of the largest investors in Colombia, is equally disappointed in this decision by the government and the manner in which it has disregarded many petitions and explanations to the Ministry of Finance of the implications of this decision.” (SAB Miller, 2010).



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In **Jamaica**, Jamaica Rum & Spirits Trade Association (JRASTA) and Desnoes and Geddes Ltd (which trades as Red Stripe) lobbied heavily for the government to adjust their special consumption tax (SCT) in favor of a single uniform rate, blaming the tax for the company's poor 2010 performance. The chairman of Red Stripe warned that if the SCT was not reviewed, it would "become counterproductive and would yield less revenue for the Treasury" (Rose, 2010).

In **Bolivia**, where more beer was being consumed than milk, the government created the Fondo Pro-Leche, or Pro-Milk Fund, to encourage the consumption of milk by preventing a rise in its price. The government's proposal called for a BOB 0.10 (EUR 0.01 USD 0.01) contribution on each litre of beer sold in order to finance the trust. This was strongly opposed by industry, including CBN. The proposal, however, was passed despite the industry's strong opposition.

Many cities in the region have adopted dry laws (or blue laws) that restrict the sale of alcohol during specific hours of the week. In **Peru**, the City of Lima implemented a regulation restricting the sale of alcohol after 03:00 hours (3 AM) in March 2011.

Retailers lobbied against the bill, and only two districts of Lima complied. As a result, there has been no time limit for purchasing alcohol since 2012 (Euromonitor International Ltd., 2015c). In Chile, the industry and its allies so fiercely opposed time restrictions in Providencia that the municipality was forced to take back the regulation after only a few weeks of its implementation (Fernandez, 2014).

Officials in Bogota, **Colombia** withstood pressures from retailers and a major trade association and banned all alcohol sales for on- and off-premise sites for three days during the 2014 World Cup in an effort to prevent further violence after the country's opening game victory resulted in over 3,000 fights that left nine dead and 110 injured (Jenkins & Medina, 2014).

In response to government plans to require warning messages to cover 36% of the label in **Peru**, Pisco producers drafted the Manifesto of Moquegua to the President outlining their opposition, stating that the measure would affect the image of Pisco and put their annual consumption growth rate of 15% at risk. Producers also stated that moderate consumption of Pisco is beneficial for health and the product should not be presented as harmful (El Comercio, 2012). **Peru** law now specifies that only 10% of the label must state "Drinking in excess is harmful" (Euromonitor International, 2015c). In Brazil, the industry actively opposed a bill which would have required alcoholic beverage manufacturers to inform customers about the potential dangers of alcohol consumption. The country's Chamber of Deputies rejected the bill following this opposition.

Although 23% of all emergency patients treated for traffic accidents consumed alcohol above the allowed limit, wine producers in **Argentina** opposed government plans to toughen the existing drink-driving regulations. After Cordoba province implemented a zero tolerance policy, wine sales were reported to have fallen by 20%. Wine producers lobbied to maintain current policies, suggesting instead that law enforcement require the use of interlock devices that make it impossible for an impaired driver to start the car (Esmerk Latin American News, 2014b).

Partnerships and collaboration

Industry may also gain additional political access and influence over policy solutions through partnerships and collaboration with government.

In **Panama**, SABMiller's Cervecería Nacional (CN) announced that they were the first private company to join CONTSEVI, the National Council of Traffic and Road Safety. "As CONTSEVI is the organism that counsels the transit authorities in the country, the brewery became part of the council that decides public policies for transit issues in Panama." The company launched the CN Road Safety Program in the presence of the media, the Police Chief, and prominent government authorities. In a story highlighting these activities, SABMiller (2015b) explained that Panamanians often blame drunk-driving for the country's high rate of road traffic deaths, but speeding and the use of cell phones while driving are bigger contributors.

In **Peru**, where illicit alcohol had been the company's largest competitor, SABMiller worked with local authorities in an effort to take some of the 30% market share currently held by informal alcohol producers (SABMiller, 2013). "We can get that [their share] down to 10% if the government helps us with a few laws," said president of the SABMiller subsidiary in the country. "Instead of 4.9% growth, you are looking at 8.4% sales growth this year (due to the illegal alcohol crackdown)". (Kevany, 2011).

On November 9, 2012, **Trinidad and Tobago's** Ministry of Transport began meeting with TTBA, an active SAPRO, to discuss "areas of co-operation" for a road safety campaign. A week later, a follow-up breakfast was attended by Ministry of Transport, TTBA, the Minister of Justice, President of the Trinidad and Tobago Chamber of Industry and Commerce, members of a taxi association and other stakeholders. At this meeting, it was decided to develop a Charter of Agreement for a public awareness campaign to be jointly run by TTBA and the Ministry of Transport. The campaign included engagement of public personalities and brand ambassadors, radio and television messages, billboards and engagement of Olympian endorsees (Ministry of Transport, 2012). In 2015, the Ministry of Transport again partnered with TTBA to officially launch their 2015 Drink Drive Campaign entitled "Who'll Be Driving You?" These activities have not been evaluated in the region but other research has found them to be ineffective (Babor et al., 2010).

In April 2010, Backus participated in a Road Safety meeting with the Ministry of Transport and Communications and the Ministry of Interior of **Peru** during which the Declaration of Lima was signed. The Declaration announced the formation of a monitoring committee to create public awareness of the importance of road safety. The company participated in a similar meeting in Pucallpa, Madre Dios in November 2010. And, in an effort that goes far beyond their role as producers, distributors, sellers or marketers of alcoholic beverages (Chan, 2013), IARD/ICAP has been working directly with state authorities in **Mexico** to take responsibility for the education and training of law enforcement personnel related to drink driving (IARD, 2019).

In **Bolivia**, Cerveceria Boliviana Nacional S.A. (CBN) partnered with the Ministry of Health and Sports in 2012 for "Together for Bolivia", a "cooperation agreement" to support sports and athletes through three initiatives: (1) building soccer fields; (2) sponsoring athletes to train for the Olympics with the ambition of obtaining the first Olympic medal for Bolivia in Rio 2016; and (3) sponsoring the School Olympic Games in Bolivia. This agreement was renewed after the Rio Olympics with the support of 28 athletes representing Bolivia at the XI South American Games (CBN, 2017). The company's 2018-2019 Activity Report (CBN, 2019) describes several monthly social responsibility programs in partnership with national and local governments, including Transit Department in La Paz, the Educational Department (CBN paid teachers' salaries and children's meals), and the National Public Safety Department (informational campaign about harmful alcohol consumption).

Activities to shape the evidence base

Research to generate scientific evidence is another tactic used by the industry. The tobacco industry used this tactic to create doubt about scientific findings linking tobacco to cancer and heart disease (Michaels, 2008). The largest alcohol industry SAPRO was the International Center for Alcohol Policies (ICAP), until it was absorbed in 2015 by the International Alliance for Responsible Drinking (IARD). IARD/ICAP publications instead emphasize education and treatment for heavy drinkers (among the least effective measures to reduce alcohol-related harms) and attempt to reframe the debate from reducing population levels of consumption to the more limited goal of changing individual drinking patterns. The scientific basis for these arguments is often not discussed.

Funding research

Over the past decade, the alcohol industry has increased its research funding as part of its CSR activities. Industry-funded research in LAC is primarily focused on illicit alcohol, a major competitor in the region, and on underage drinking. Research on underage drinking in the region includes studies by AB InBev in **Argentina** and two studies by Bavaria in **Colombia**. The *Second Study of Underage Alcohol Consumption* was conducted in seven capital cities and two small municipalities (Bavaria, 2015). In **Chile**, CCU conducted research on parents' understanding of responsible drinking. The results suggested that programs like *Educating within the family* (an industry-funded program providing information for parents) could "help families to improve communication."

Through IARD/ ICAP and the umbrella body Global Actions on Harmful Drinking (2014), major international drinks companies have funded several research projects in **Mexico** (Gordillo, n.d.) and **Brazil**⁹ "to measure the extent and nature of noncommercial alcohol production and consumption, help set the agenda for interventions at national and regional levels, and launch a program of action to reduce problems." In 2012, SABMiller asked Facultad Latinoamericana de Ciencias Sociales (FLASCO) to examine consumption patterns across the LAC region. The industry-funded study reported that countries with lower per capita levels of beer consumption have a higher proportion of the population prone to harmful consumption of alcohol, "mostly cheap and often illegal spirits."

The findings presented in an unpublished report (Cerveceros Latinoamericanos, 2018; Sojo, 2012) include the following: 1) there is no direct relation between the prevalence of annual alcohol consumption and rates of harmful consumption, especially binge drinking; 2) cross-national differences indicate the need to develop programs geared towards specific populations according to their consumption pattern. No rank order correlations are provided to support this assertion. If this is a general statement, it is not consistent with a considerable amount of epidemiological data (see Babor et al., 2010, Chapter 4).

Similarly, a study carried out on behalf of CBN in **Bolivia** was used to inform policy makers that illicit and informal alcohol cost the government around USD 101mn (EUR 94.68mn) in losses in 2013. The Association of Producers and Importers of Alcoholic Beverages in **Costa Rica** also had a similar study prepared¹⁰. In Brazil, this resulted in industry funding for the establishment of the Centre for Information on Health and Alcohol (CISA), a research center that receives 90% of its funding from the alcohol industry. The work of CISA focused initially on public information and education projects; and gradually, industry research activity became a core part of its agenda. According to its Director, (2008), CISA "is an example of how funding by the alcohol industry is used to invest in a serious project in which the independence of the research team is ensured." Since setting up CISA, Guerra has been an author on 23 journal articles with "alcoholism" or "alcohol" in their titles, which make no acknowledgement of his industry support. There has been much academic debate regarding the legitimacy and ethical implications of such research (de Andrade, 2008; Pinsky & Laranjeira, 2008).

In a 2008 newspaper interview, the then Brazilian health minister articulated his intention to restrict alcohol advertising in the country. Appearing on the same page as the interview was an article written by CISA. While the minister defended restrictions on advertising, the CISA article undermined the importance of regulating alcohol advertising: "to the power that advertising allegedly exerts... there is no scientific evidence that its restriction would reduce the harms associated with alcohol abuse". The piece went on to suggest that the government's proposal was a marketing stunt, instead suggesting vague long term measures to contain alcohol problems in the country. At the end of the article CISA's name and two medical universities' names appeared side by side. There was no mention of industry support (Pinsky and Laranjeira, 2008). Since 2017, Guerra has become the coordinator of the Sao Paulo city program to tackle alcohol and drug use, Redencao. As such, he has been involved in the development of public policies for the city and reached an even larger role nationally in the SUD field.

9 Two studies in Brazil were conducted as part of The Noncommercial Alcohol initiative of Global Actions on Harmful Drinking. The first one was performed in the region of Diadema and the second one in selected locales of Minas Gerais.

10 Read about this study at http://www.centralamericadata.com/en/article/home/Liquor_Smuggling_in_Costa_Rica.

Reputation management

Another industry tactic is using the media to influence public opinion on an issue that directly affects the advertiser's business. Despite limited evidence on the negative impact of illicit alcohol consumption, SABMiller ran a media campaign called *Licores Adulterados de Colombia* (LACRA) – a parody about a fictional illegal alcohol company which “seeks to change consumer attitudes towards illegal alcohol by exposing its dangers.” (SABMiller plc, 2013). This campaign came out the same year that SABMiller's Latin America regional chief explained to investors that the company is seeking to increase consumption among its core low-income consumers by attacking illicit alcohol (Reuters, 2013). An industry-funded SAPRO operating in **Mexico**, FISAC - Foundation for Social Investigation (Fundación de Investigaciones Sociales, A.C.), contributed to efforts to decrease the production and consumption of informal alcohol by collecting bottles from restaurants and bars “in order to diminish the refill with non- commercial alcohol.” According to a summary by ICAP, 1,405,388 bottles were collected in less than 3 years.

In another initiative, FISAC partnered with several government entities (mainly economic and fiscal ministries) and commercial groups (e.g. CONCAMIN) and created “*Juntos contra la ilegalidad*”, which includes several government actions to reduce not only illicit alcohol, but also illegal vapors and electronic cigarettes. Concerning alcohol, the website reports that in 2018, there were 272 visits to fiscal addresses related to alcohol products and 25% did not really exist because they were “ghost” addresses.¹¹ Parallel to this, the same group created “*Verifica tu botella*”, that is basically an authentic seal for the alcoholic drink bottles that may be verified by apps downloaded to the customers' cell phones.



¹¹ See *Juntos contra la ilegalidad* website at <http://juntoscontrailegalidad.mx/inicio/acciones-por-sector/bebidas/>

Comments

As indicated by the activities documented in this section, the use of information and other tactics to gain access to policymakers and to influence public opinion is a strategy operationalized through a combination of Corporate Political Activities (e.g., lobbying) and Corporate Social Responsibility activities (e.g., shaping the evidence base, forming partnerships with governments and civil society organizations). Direct and indirect lobbying (meetings and correspondence with policy makers), shaping the evidence base (funding and dissemination of research, use of paid consultants, position papers, technical reports), partnership with civil society organizations, and collaboration with government agencies (e.g., serving on working/advisory groups, providing technical support and advice) are not only ways to influence policy, they also serve as methods of reputation management when the industry actors are found to be engaged in self-serving or illegal activities. All of these tactics are designed to achieve corporate aims by controlling access to key information that can affect policy and regulation.

Some of this influence is exercised through a set of key agenda items that are designed to promote the industry's interests: low alcohol taxes, minimum regulation of alcohol availability, and industry self-regulation of alcohol marketing.

At the same time, the industry's increasing investments in corporate social responsibility (CSR) activities have coalesced around a few themes: alcohol education is the best preventive measure, combined with an emphasis on parental involvement; drink-driving policies should focus on designated driver programs and increased enforcement of existing laws; underage drinking can be prevented by means of parental communication and server training; and unregistered production of alcohol can be eliminated by allowing low cost licensed alcoholic beverages to compete with the illicit market.

Illicit alcohol is the industry's biggest competitor in many countries within the region. This may explain why the industry is quite active in the area of informal alcohol, undertaking various CSR activities to reduce its production and consumption. Although consumption of illicit alcohol has been associated with alcohol poisoning outbreaks related to toxic agents like methanol used in its production, there is evidence that most illicit alcohols are no more harmful than commercially produced alcohols (Kanteres, Lacheneier, & Rehm, 2009). Instead of framing the issue as one of competition for profits, the commercial producers justify their opposition in terms of humanitarian concerns. These efforts have

been successful – beer's share of alcohol in SAB's Latin America's markets where informal alcohol is the largest competitor rose to 59% from 55% over four years (Chaudhuri, 2015). According to Karl Lippert, president of SAB Latin America, "This has been achieved primarily by taking share from cheaper spirits, and untaxed and inexpensive illegal alcohol. Our beers provide a safe, attractive and affordable alternative to illegal alcohol, which represents more than a fifth of the total alcohol illicit market in some Latin American countries" (Food & Drink Business, 2015).

Through the sponsorship of CSR activities, which oftentimes include civil society organizations and governments, the alcohol industry minimizes its own responsibilities to prevent the abuse of its products, instead placing the emphasis on individual responsibility and interventions. Alcohol industry prevention and CSR activities include responsible drinking campaigns and educational programs, which emphasize individual voluntary (rather than legislative) solutions to alcohol-related problems. These activities are designed to improve the public image of the producers, making them appear to be good corporate citizens who ensure that their products are used responsibly. With regard to underage drinking, some companies are not only negligent in this area but have also been subject to accusations of encouraging it (American Academy of Pediatrics, 1995; Hastings, 2009).

There are many concerns regarding the potential conflicts of interest that arise when highly profitable businesses enter the public health arena. In a Round Table discussion in the WHO Bulletin (Matzopoulos, Parry, Corrigan, Goldstein, & London, 2012), it was argued that industry-civil society partnerships "lend legitimacy and provide a platform for the liquor industry to lobby against proposals to reduce the availability of alcohol, increase the price of alcohol through raising excise taxes and place restrictions on the marketing of alcohol, despite the global evidence that these measures are the most cost-effective way to decrease alcohol-related harm" (24, p. 67). The same authors asserted that NGO support/ funding to alcohol producers signifies the successful attempt of profit-minded industry to position itself as committed to public health objectives.

This is supported by the business literature, which argues that a company's credibility is the most important characteristic of both lobbying (Heinz, Laumann, Nelson, & Salisbury, 1993; Hull, 1993) and constituency-building (Keim & Baysinger, 1993; Sethi, 1982). Companies lacking in local credibility have a decreased ability to affect public policy decisions

(Boddewyn, 1993; Hull, 1993; Luo, 2001). In a review of CPA by Hillman et al. (2004), the authors point to a “melding” between CPA and corporate social performance (i.e., a company’s CSR and corporate citizenship over time). For example, a firm with a history of sponsoring community projects most likely attains easier access to and a better hearing from local politicians. In this manner, a company’s or industry’s social activities become new forms of political influence. CSR activities allow the industry to gain access to the public domain and policy makers, while improving their reputation and responding to public demands for socially responsible behavior. Additionally, industry partnerships divert resources and attention away from evidenced-based interventions (Brown, 2015). Speaking at a global conference on health promotion, WHO Director General Margaret Chan (2013) said it was “dangerous” when industry gets “involved in policy-making.”

Regarding the industry’s responsible drinking campaigns and partnerships, since the 1990’s, researchers (Wolburg, 2005; Pantani, Sparks, Sanchez, & Pinsky, 2012; DeJong, Atkin, & Wallack, 1992; Barry & Goodson, 2010; Smith, Atkin, & Roznowski, 2006; Pantani, Peltzer, Cremona, Robaina, Babor et al., 2017) have analyzed the use of such messages (i.e., “drink responsibly”) and have concluded that instead of encouraging moderate consumption, the messages create a favorable image of the alcohol brand without having any influence on excessive drinking. An analysis of a sample of industry’s ‘Actions’ in support of the WHO Global Strategy (Babor & Robaina, 2013; Babor et al., 2018; Esser et al., 2016), some conducted in Brazil, Argentina and Uruguay found that most reflect training programs, “responsible drinking” media campaigns, and other activities that have not been evaluated or have been found to be ineffective in preventing or reducing harmful drinking. Responsible drinking campaigns can therefore be considered another form of alcohol marketing and may even encourage alcohol consumption. Furthermore, the industry has not produced any evidence as to their effectiveness, only that participants like them. Through these activities, the industry minimizes its own responsibilities to prevent the abuse of its products, instead placing the emphasis on consumers to drink responsibly. Industry CSR programs strategically undermine evidence-based solutions while creating the appearance of the industry acting responsibly to prevent abuse of its products.

Another CSR activity is the use of warning labels on alcoholic beverages. In some cases (e.g. Jamaica), the industry has implemented a voluntarily system of providing consumer information on labels. The example of other countries, however, indicates that

these types of voluntary effort tend to be poorly implemented and ineffective. The UK attempted to improve labelling through voluntary agreements with producers in 2007, including serving size and health warnings related to unsafe consumption. However, a published evaluation of the industry’s efforts found that just 15% of drinks were properly labelled. Similarly, a voluntary labelling system was launched by a large SAPRO in Australia in 2011. A review of the program found that only 16% of the 250 products sampled carried any warning message (Foundation for Alcohol Research & Education, 2011).

The use of research funding as part of its CSR activities was pioneered by the tobacco industry, which funded studies that called into question the methods and findings of research showing that tobacco products cause cancer and heart disease, and that nicotine is addictive (Michaels, 2008). There are reasons to believe that research conducted by the alcohol industry or funded by industry-supported third-party organizations is biased in terms of the topics chosen and the results reported (Robaina and Babor, 2012; Babor and Xuan, 2004.). Such research is likely to support the industry’s position that education is a better alternative to regulation and to be used by the industry to argue for stricter enforcement around informal alcohol. Another problem with industry-funded studies is that normal ethical review procedures are sometimes not followed, the quality of the methods is low, and financial conflicts are not declared (Babor, 2009).

The industry also finances academic researchers to disseminate messages regarding “responsible drinking” and “alcohol and health,” to use scientific arguments and counter-arguments to influence public policy and to establish a positive public image (Pantani, Sparks, Sanchez, & Pinsky, 2012; Wolburg, 2005). This tactic, forged by the tobacco industry, is used to create doubt about available scientific evidence. This has been shown to influence policy makers across a wide range of health and environmental concerns, as well as on public opinion.

The industry has attempted to shape public opinion and government agencies to view alcohol not as a drug, but as a cultural product and valued legal commodity. In Argentina, for example, the government passed a bill declaring wine to be the national beverage, reflecting a political decision to further promote wine production and consumption. This bill was accompanied by media campaigns and tax exemptions.

Constituency building

As part of the constituency-building strategy, the industry also has numerous allies who act as collaborators at the country and local levels. Many of these allies are groups that profit from the sale of alcohol (e.g., convenience stores, restaurants and bars, grocers, gas stations, pharmacies, tourism groups, hotels, and advertising groups).

Collaboration among industry segments

In 2012, the 7 largest alcohol distributors in **Guatemala** came together to demand a reduction in price of import taxes on whiskey and vodka, pointing to competition from illicit trade: "It's hard to compete against those who do not pay a penny in tax, who evade not only import tariffs but also the ISR (Income Tax) and VAT (Value Added Tax), it is unfair competition." According to the President of one of the companies, "The government is responsible for smuggling because taxes are too high. When taxes are lowered smuggling will be eradicated, it is clear that the higher the tax is, the more appetite there is for this illegal business." After import taxes were reduced from 40% to 15%, in 2019 several large liquor companies (including Diageo, Pernod Ricard, Bacardi) founded a new SAPRO group in **Brazil** called: Nucleo pela Responsabilidade no Comercio e Consumo de Bebidas Alcoolicas no Brasil (Nucleus for Responsibility concerning Selling and Consumption of Alcoholic Beverages in Brazil). Its inaugural event in Sao Paulo city focused on the definition of a dose of alcohol in the Brazilian context

(where beer is not considered an alcoholic beverage) in an attempt to criticize the prevailing notion that spirits are "strong beverages" and beers are "light beverages." Another point discussed in the event (which included representatives from IARD among the speakers) concerned an "isonomic" tax system between the several kinds of alcoholic beverages (Valor, 2020).

Forming alliances with trade associations and other sectors

Trade associations represent alcohol industry interests to the media, the public and the government. Within LAC, trade associations are well developed, bringing together industry members to advance common interests. The largest of these is Cerveceros Latinoamericanos, which represents brewers from 18 countries around the region. The association plays a key role in engaging governments in Latin America in the discussion around noncommunicable diseases (NCDs) related to harmful use of alcohol and also sponsors activities to reduce alcohol-related harm. Other such regional associations include Asociación de Productores e Importadores de Bebidas Alcohólicas de Centroamérica (APIBAC – Central America) and the Caribbean Breweries Association (CBA). Trade associations for each sector (wine, beer, spirits) also exist at the country-level. For example, within Argentina there is Bodegas de Argentina (for wine producers), Cámara de la Industria Cervecera Argentina (for beer producers) and Cámara Argentina de Destiladores Licoristas (for liquors and distilled beverages).

Additionally, higher level organizations have been created to bring together producers and government agencies, such as the Corporación Vitivinícola Argentina (COVIAR), whose aim is the promotion of wine consumption, both in the domestic and foreign markets. This corporation unites some of the country's largest wine producers, their trade associations, state level governments, and national government agencies such as the National Institute of Vitiviniculture, and the National Institute of Agropecuary Technology.



The West Indies Rum and Spirits Producers' Association Inc. (WIRSPA), defines itself as an 'association of associations' in that it represents distillers associations from across the Caribbean. WIRSPA is active both regionally and internationally as the voice of the African, Caribbean and Pacific rum industry and "the organization works closely with the CARICOM Secretariat, CARIFORUM and Caribbean Governments to ensure that the industry's position is fully taken into account in all relevant forums." In 2019, for instance, the prime minister of Grenada participated in a ceremony at the WIRSPA annual technical meeting. It included the signing of a Memorandum of Understanding (MOU) with the University of the West Indies Open Campus and a declaration of his support for the industry's activities to deal with problem drinking, including product labelling and a self-regulation code at CARICOM.¹² WIRSPA is a member of The European Spirits Organization (CEPS), a trade organization representing the interests of all European spirits producers. WIRSPA is also a member of the World Spirits Alliance (WIRSPA, n.d.).

The alcohol industry may also form alliances with other sectors that may have shared interests. These include business associations (especially regarding taxes), the tobacco industry, and groups that sell their products to the alcohol industry. For example, in 2014, **Chile** began tax reforms to finance free, quality public education. Proposed reforms included increased taxes on sugar-sweetened beverages and alcohol as "corrective taxes," in which the tax on alcohol would increase from 15% for beer and wine and 27% for spirits, to an ad-valorem base tax of 18%, with 0.5% extra per each degree of alcohol content and 0.03 monthly tax unit per liter of pure alcohol. Shortly after the announcement, the country's largest brewer, Compañía Cervecerías Unidas—along with Coca-Cola, Nestlé and other food and beverage companies—announced the creation of an association, AB Chile, to represent the interests of the industry and fight the tax increase. In a blow to public health advocates, the government agreed to eliminate the per unit tax, resulting in a 50% drop in the proposed tax increase (Peña, 2014).

In an effort to stop the entry of informal alcohol and other goods into **Guatemala**, in 2014 alcohol importers joined with supermarkets, sellers of tobacco and others to create the Union of Retailers. The Union submitted to the government a number of proposals aimed preventing the illegal entry of goods (El Periodico, 2014).

Forming alliances with civil society organizations

Some sectors of the industry engage in public-private partnerships (PPPs) as a way to influence various stakeholders to adopt a common approach to alcohol-related problems. For example, in 2014 the Organization of American States (OAS), Cerveceros Latinoamericanos and CervBrasil signed a memorandum of understanding (MOU) on joint efforts to contribute to the prevention of crime and violence in the Americas. The MOU defines the conditions for funding an Inter-American Program for the Prevention of Crime and Violence, which aims to promote public safety through a comprehensive hemispheric prevention strategy with a special focus on youth (Associated Press, 2014). During the signing ceremony, the Director of CervBrasil thanked the OAS Secretary General "on behalf of all our partners for the opportunity to collaborate with this project." Secretary General of Cerveceros Latinoamericanos also applauded the agreement, stating "it will allow us to better understand the reality of youth and to make a significant contribution." (OAS, 2014).

In **Haiti**, The U.S. Agency for International Development (USAID, the US governmental agency responsible for administering civilian foreign aid) and Heineken's BRANA signed a MOU "to improve the livelihoods of Haitian farmers" by sourcing locally grown sorghum. The Smallholder Alliance for Sorghum in Haiti (SMASH) Program was expected to create jobs and improve salaries for some 18,000 small-scale farmers, building upon the Inter-American Development Bank and USAID's existing work in the country. The MOU signing event, held at BRANA's factory in Port-au-Prince, was officiated by Jose Matthijsse, General Manager of BRANA, and Mark A. White, USAID/Haiti's Acting Mission Director. Other examples of such partnerships include SABMiller and the Inter-American Development Bank's (IDB) 4e, Camino al Progreso (Path to Progress) Project, operating in six countries within Latin America and the Water Center for Latin America,¹³ created by FEMSA, IDB and ITSEM.

¹² For information on these initiatives, see <https://www.wirspa.com/grenada-pm-lauds-joint-owi-wirspa-initiative/>

¹³ For more information, see <http://www.sabmiller.com/home/stories/success-in-store>

In **Brazil**, Maio amarelo, or the “Yellow May” campaign for road safety was created by the NGO ONSEV, which receives funding from the alcohol industry for road safety reports it produces. The campaign coincided with the 3rd UN Road Safety Week, although there was no formal coordination between the two campaigns. A long running industry designated-driver campaign in Mexico, undertaken in collaboration with the prestigious ITESM, seeks to provide information on the effects of alcohol and the main causes of accidents, and to encourage the use of a designated driver. “The objectives are achieved by ensuring collaboration of all relevant personnel within the company as well as through the creation of alliances with various authorities such as Public Security and Police (Secretaría de Vialidad y Tránsito) and the Institute for Youth (Instituto de la Juventud).¹⁴

Creation of SAPROs to manage reputational damage

As the name suggests, Social Aspects and Public Relations Organizations (SAPROs) manage issues that may be detrimental to the alcohol industry (Babor and Robaina, 2013; Anderson, 2004). For example, the **Trinidad & Tobago** Beverage Alcohol Alliance (TTBAA), according to one of the organization’s members, “was borne (sic) in response to two anti-alcohol pronouncements – one by the World Health Organization, the other, resident here in Trinidad and Tobago by our own public policy officials.” Its statement of purpose indicates it is concerned with the effect of WHO activities on the industry. Other active SAPROs operating in the region are the International Association for Responsible Drinking (IARD, formally known as the International Center for Alcohol Policies, or ICAP), Fundación CorResponsable in Venezuela, the Fundación de Investigaciones Sociales A.C. (FISAC) in Mexico, and the Association for Responsible Alcohol Consumption (Aprocor) in Chile, which claims to have the support of WHO (Fundación Aprocor, 2016).

Comments

Constituency-building by means of forming alliances with other industry sectors, civil society organizations, and the creation of SAPROs are tactics that can multiply the number of voices promoting industry-favorable policies to the general public, government regulators and policymakers. Other groups that may have shared interests are business associations (especially regarding taxes), the tobacco industry and groups that sell their products to the alcohol industry. The interests of the alcohol industry are often represented by trade organizations and by industry-funded SAPROs, such as Instituto Brasileiro de Cachaca.¹⁵ The alcohol industry also creates front groups or third-party organizations to lobby on its behalf, forming alliances with NGOs and other civil society organizations. This generally occurs when the industry is facing a significant regulatory threat (Savell et al., 2015).

¹⁴ For more information on Maio amarelo, or Yellow May, see <https://maioamarelo.com>

¹⁵ See <http://www.ibrac.net/>

Policy Substitution

A key tactic used by the industry to prevent the implementation of regulations is the promotion of voluntary actions, particularly self-regulation. This is a major theme within the alcohol industry's policy agenda.

Develop/promote self-regulation

The industry actively lobbies to develop new (or preserve existing) self-regulation and voluntary codes of practice in place of formal legislation. The regulation of marketing is an issue that is often addressed by the alcohol industry through the creation of SAPROs. For example, the Trinidad & Tobago Beverage Alcohol Alliance (TTBAA), with support of Pernod Ricard, launched the "ONE" Campaign. The campaign had the following objectives: 1) market the TTBAA as a self-regulatory body through strong branding of its logo and mandate; 2) use "subtle messaging" to influence drink-driving attitudes, particularly among persons between 18 and 35 years of age; 3) promote responsible drinking through "non-judgmental" messaging; 4) create a value system that recognizes individual as well as collective responsibility; 5) create awareness, engagement and active participation from stakeholders; and 6) encourage consumers to practice and support responsible drinking.¹⁶

As explained by the SAPRO's Chairman, TTBAA "has a strong regulatory framework of self-regulation to set out rules of conduct and engagement for its members to follow before legislative framework is instituted which can affect companies' bottom line." (Antoine, n.d). For example, since 2010, there has been an effort by all of the major international drinks companies through the umbrella body Global Actions on Harmful Drinking (2014) (advanced by ICAP) to support self-regulation in emerging markets as "an alternative to detailed legislation". The countries that are the focus for the self-regulation initiative in the region are **Argentina, Brazil, the CARICOM** region countries, and **Mexico**.

ICAP sponsored a Workshop on Self-regulation for Latin America, held in Santiago, Chile. The Workshop resulted in the Santiago Declaration (ICAP and CONAR-Chile, 2007), which outlined six points:

1. The alcohol industry has a shared interest in ensuring effective self-regulation;
2. A shared view on both the regional and national levels is needed;
3. Self-regulation is not only a code for marketing, but also a process;
4. Self-regulation needs to be understood by those outside the industry;
5. Self-regulation has an important role in promoting responsible drinking; and
6. ICAP can serve as a bridge between the industry and other stakeholders.

In January 2009, the Mayor of Bogotá, **Colombia** issued Decree 013, 2009 forbidding the sales of alcoholic drinks in off-trade establishments between 23:00hrs and 10:00hrs.¹⁷ The aim was to reduce violence and crime. A study evaluating the decree found that the restriction reduced problematic consumption, death and injuries from car accidents, and incidents of battery (Mello et al., 2013). Several retailers protested. The ban was then lifted following an agreement between the city's Chamber of Commerce and local government to self-regulate sales and prevent consumption in public places. Retailers also successfully lobbied against restrictions on opening hours implemented in Lima, **Peru**. There are no time of day restrictions on buying alcohol in the country (Euromonitor, 2015).

When an inter-ministerial group was created with the objective of defining a national policy for **Brazil** in 2003, the alcohol and advertising industries pre-emptively revised their voluntary marketing code (e.g., restrictions on the use of sexual content and cartoons, models featured in the advertisements should be and appear to be older than 25). The marketing code defines alcohol as products with alcohol content higher than 13 Gay Lussac (GL) degrees, thereby excluding beer and wine.¹⁸

Some industry players, particularly beer producers, launched media campaigns to improve their image and to exempt certain products (e.g., beer) from being included in the advertising restrictions. AmBev,

16 As reported by ICAP. See <http://initiatives.producerscommitments.org/initiative.aspx?id=26035&hash=%23country%3D188#.VczijPIViko> and <http://initiatives.producerscommitments.org/initiative.aspx?id=25864&hash=%23country%3D188#.VcziofViko>

17 In January 2012, another measure was imposed in Bogota related to the permitted hours alcoholic drinks can be sold near educational institutions, such as schools and universities. All types of retailers located within 200 meters of educational institutions are banned from selling alcoholic drinks between 23:00hrs and 15:00hrs.

18 See <http://galalaw.com/archives-52004/85-americas/94-brazil-new-rules-to-restrict-advertisement-of-alcoholic-beverages-in-brazil> for additional information

for example, initiated a well-publicized drink driving prevention campaign and a related initiative to curtail alcohol consumption among minors (Pinsky & Laranjeira, 2004). In 2019, a congresswoman from Sao Paulo tried unsuccessfully to restart a national discussion about reducing to 0.5 GL for a beverage to be defined as alcoholic.¹⁹ So far, the pressure she has received from interest groups did not allow the discussion to go ahead to become a law.

Develop/promote ineffective or unevaluated voluntary measures

In 2012, a consortium of transnational corporations and other industry segments publicized a set of over 3,500 “industry actions,” which they claimed to be conducted in support of the WHO’s Global strategy to reduce the harmful use of alcohol²⁰. A full list of the actions conducted throughout the world, including LAC countries, was posted on the Industry Actions website (initiatives.global-actions.org), which was subsequently discontinued without explanation. The website (managed by ICAP and its successor organization, the International Alliance for Responsible Drinking) included 220 industry-sponsored activities that were initiated in at least 22 LAC countries, primarily in the areas of drink-driving, self-regulation, and alcohol education (e.g. ‘responsible drinking’ campaigns). An analysis of these industry actions (Pantani et al., 2017; Babor et al., 2018) found that less than one-third (32.8%) of them were consistent with the WHO Global Strategy areas considered likely to have a positive impact on drinking behavior or alcohol-related

problems; 55.8% of the actions were considered to have the potential to promote a brand or product; and one quarter (25.4%) of the actions were found to have some risk of harm. Almost all of the activities lacked a systematic evaluation to provide evidence of effectiveness.

One area in which the industry invests much in publicity is the development and promotion of ‘Responsible drinking’ messages and campaigns. **Table 5** summarizes the key messages from some of these campaigns.

In 2010, SABMiller began promoting “Rumba Segura” (“Party Safe”) in **Colombia**, a program to tackle hazardous alcohol consumption and unsafe conditions in ‘party zones’ which encourage violence and crime. As a partnership between local governments in Bogota, Medellin, Cali, Barranquilla, Ibague and Cúcuta and trade associations and retailers in each city, the campaign “seeks to provide education and create a safer environment in terms of security and infrastructure”. According to SAB’s internal evaluation of the program, by the end of 2012: 520 retail workers wore t-shirts with the message 18+; 12,000 bottles of water were given away to promote moderation and hydration; 48,500 free rides were arranged; and 29,000 pieces of campaign material (fans and flyers) were distributed.²¹ No evidence was collected to determine whether these voluntary measures had any impact on the incidence of violence and crime (WHO, 2010).

COUNTRY	PRODUCER	MESSAGE
Brazil	AB InBev	“Minors and drinking are out of play”
LAC	Heineken	“Enjoy Heineken Responsibly”
Colombia	SABMiller	“Party safe” (“Rumba Segura”)
Dominican Republic	Cervecería Nacional Dominicana (CND)	‘If you take a drink, take it easy’; ‘If you take a drink, take the pulse of your conscience’; and, ‘If you take a drink, don’t put yourself behind the wheel.’
Mexico	Casa Pedro Domecq	“Whether you drink or drive” (“O Tomas O manejas”)
Mexico	Diageo Mexico	“Mexico, You Always Have It On”

Table 5. “Responsible Drinking” messages in Latin America and the Caribbean

19 See <https://odocumento.com.br/impacto-do-alcool-na-sociedade-sera-tema-de-audiencia-publica/> for more information

20 View commitments at <http://www.producerscommitments.org/commitments.aspx>

21 See evaluation and copy of materials distributed, see http://gsri.worldwidebrewingalliance.org/php/initiatives/initiative.php?ini_id=1358.

The industry has supported numerous voluntary initiatives to promote road safety in at least 20 countries in the region (International Center for Alcohol Policies, 2012a). Examples include:

BOLIVIA

AB InBev launched a television campaign encouraging young adults to take a taxi whenever they drink. “The campaign also seeks to communicate on the extra benefits of having fun without driving when alcohol is consumed.”²²

BRAZIL

Ambev donated breathalyzers to police. This action, however, had little to no impact, as they could not be used for actual surveillance because they were not approved by federal government institutions (Pantani et al., 2012).

PERU

Backus supported the “Elected friend campaign”, which promoted the nomination of a designated driver in a group of friends. The campaign included advertising material, billboards, TV commercials and the donation of alcoholmeters to the police.

CHILE

Diageo, in conjunction with the Diageo Foundation, developed a partnership with Carabineros de Chile (a well-respected local police department) and launched a wide scale drink-driving awareness campaign. Consumers were informed about ‘responsible consumption’ through 30 -trade outlets in Santiago where promotional material included posters, coasters and matches. The materials could be easily confused with marketing materials.



A number of SAPROs/ trade organizations have also supported voluntary measures. These include Association for Responsible Alcohol Consumption (Aprocor) in **Chile** handing out leaflets to educate and create awareness among drivers during New Years, and FISAC’s “Drop the keys” campaign in **Mexico**.

22 See campaign information at http://gsri.worldwidebrewingalliance.org/php/initiatives/initiative.php?ini_id=1227

Promoting alternative regulatory policy

The alcohol industry can compromise effective policies to reduce alcohol-induced harm by lobbying for the passage of weaker legislation. For example, in 2014 **Jamaica** Health Minister, Dr Fenton Ferguson, expressed concern over the advertising of alcoholic beverages during prime time, and the high level of alcohol advertisements seen by children (Green, 2014). President of the Advertising Agencies Association of Jamaica (AAAJ) quickly responded, stating that “Our industry abides by a Code of Advertising Practices supported by a Code of Communication Practices developed and implemented by Jamaica Alcoholic Beverage Association (JABA) which ensures that both the messaging and the visuals in all ads promote responsible consumption by adults.” The AAAJ proposed that the minister’s objectives would be better served if the Government joined with the liquor industry in promoting responsible drinking. AAAJ President also advised, “Advertising plays an important role in the economy. Effective communication helps companies create more jobs, pay more tax and contribute directly to economic growth.” (The Gleaner staff, 2014). After “working together” with the industry, Ferguson’s new regulations for alcohol advertising only stipulate that advertising must include “responsible and cautionary messages.” (McIntosh, 2014).

In March 2016, government officials in **Ecuador** announced plans to increase taxes on cigarettes, alcohol, and soda. Concerned by these proposed tax reforms, which would raise taxes on beer from US\$ 7.24 to US\$ 12 per liter of pure alcohol, executives from the national brewery, Cervecería Nacional (CN), presented their own proposal to the Economic Regime Commission on 6 April 2016. CN instead suggested a gradual increase in taxes. For lower-strength beers (less than 5% alcohol content), the tax would amount to US\$ 8 per liter of pure alcohol. The tax on beverages with an alcohol content of 5%-20% would amount to US\$ 12 per liter of pure alcohol, and for beverages with an alcohol content above 20%, it would amount to US\$ 14 per liter of pure alcohol. CN stated the company would maintain product prices under such reforms (Esmerk Latin American News, 2016).

Comments

Consistent with the industry strategies designed to control information and build constituencies, the alcohol industry in LAC uses these strategies to promote ineffective or unevaluated voluntary measures instead of effective measures that result in reduced alcohol problems. Policy substitution takes the form of promoting self-regulation, endorsing alternative regulatory policy and developing ineffective voluntary activities. A key question is whether this strategy is a deliberate attempt to deceive the public and policymakers based on their enormous conflict of interest, or merely a result of insufficient scientific expertise. The example of the Tobacco Industry (Michaels, 2008), which developed the Playbook for many of these tactics, suggests the former.

Financial incentives and financial leverage

Donations and campaign contributions

The alcohol industry maintains strong connections to local and state governments. For example, according to **Brazil’s** Superior Electoral court, the body responsible for elections, alcohol companies donated, in total, R\$242,985,351.55 (about \$86,780,482.50) for the 2014 elections, the last year such donations were allowed. Ambev was the largest donor at R\$92,524,141.92 (approximately \$33,044,336.10). This was a three-fold increase over amounts donated in 2010, suggesting that the alcohol industry is increasingly using campaign contributions as part of a broader political strategy.

Although Brazil receives the greatest amount of political contributions from the alcohol industry, other LAC countries have also been targeted. In **Colombia**, SABMiller’s subsidiary Bavaria SA made donations totalling US\$1,604,021 to a number of political parties and movements participating in the congressional elections “to support democracy”. In **El Salvador**, their subsidiary company, La Constancia, SA de CV, made donations totalling US\$404,000 allocated across seven political parties participating in the 2014 presidential elections. It also donated US\$39,000 of soft drinks for volunteers assisting during the elections in El Salvador, and US\$45,881 for volunteers in Honduras during the 2014 general elections (SABMiller plc, 2014).

Current chairman and CEO of FEMSA, José Antonio Fernández Carbajal, is also president of the board of directors of The Monterrey Institute of Technology and Higher Education (ITESM), the largest private university in Latin America (ITSEM, 2012). Former presidents include its founder, Eugenio Garza Sada (1943–73) and his son, Eugenio Garza Lagüera (1973–97), who both served as chairmen of the board of FEMSA. Other members of FEMSA's Board of Directors (e.g., Eva Garza de Fernández, Ricardo Guajardo Touché), are also members of the Board of Directors of ITESM.²³ As such, ITSEM routinely receives donations from FEMSA and its subsidiaries. Since 2008, the company supported applied health research for the early detection and prevention of diseases, with an investment of US\$ 7.7 million in 2018. The FEMSA Foundation also helped to finance (US\$ 1.2 million) the Institute's Water Center for Latin America and the Caribbean. FEMSA's donations, through FEMSA Found, also contains programs for children in Mexico, Colombia, Equator and Brazil. A capacity building strategy, aimed at school principals and educators in the city of Jundiai (Sao Paulo state, Brazil) was developed using Sesame Street characters with the aim to "stimulate healthy lifestyle habits since early childhood".

In the 1990's, the owner of Cervecería Boliviana Nacional SA (CBN), **Bolivia's** largest brewery also founded the Populist Party Unidad Cívica Solidaridad (UCS). After three consecutive electoral victories, UCS "in many ways operated as the political wing of the city's largest employer [CBN]". UCS meetings were run out of the CBN bottling plant. According to Faguet (2003), CBN financed not only the UCS, but also the entire local political party system, "with abusive and monopolistic effects." Political tactics included advertising campaigns combining politics and beer, using its retail network to distribute political propaganda, and enlisting staff to attend political rallies where free beer was provided. CBN belongs currently to AB InBev.

A report in a major Brazilian magazine, *ISTOÉ Independente*, revealed a relationship involving former President Lula, the owner of Itaipava brewery (Cervejaria Petrópolis), Walter Faria (known as Mr. Itaipava), the diversion of public money from Petrobras (one of the largest oil companies in the world) and the financing of presidential campaigns of the Workers Party, in particular the election of the subsequent president, Dilma Rousseff (Simas Filho, 2015).

Another industry strategy which directly targets policy makers is the use of financial inducements to influence government. In 2012, the government of **Brazil** postponed a tax increase on beer after an "agreement" with the beer industry. In return, the industry committed to increase job offers and invest in technology improvements – a cooperative agreement termed the 'Greater Brazil Plan' (*Esmerk Latin American News*, 2012). Two years later, after a meeting between Brazil's finance minister and AB InBev executives in the country's capital, the government again postponed the 2.25% tax increase to September, after the World Cup. According to Brazil's Treasury minister Guido Mantega, the decision was made out of concerns about inflation, which he stated could be substantially affected by the beer sector due to the World Cup (Malinowski & Simoes, 2014). As explained by BMJ reporter Jonathan Gornall (2014a), a World Cup host country must waive taxes on any profits made by FIFA's commercial partners during the event, an "obscene" stipulation that allows sponsors such as AmBev to pocket every Real spent during the event. According to the antipoverty campaign group InspirAction, this provision deprived Brazil of an estimated \$523 million in revenue (Christain Aid, 2014). In September, the increase was postponed again, in what some view as an attempt to placate the private sector prior to elections. The industry was expected to maintain jobs and continue to invest in return for postponing the increase (*Esmerk Latin American News*, 2014).

Transcripts from an AmBev Earnings Conference Call (2011) provide some insight into this process. Speaking to investors regarding a potential tax increase, CEO Joao Neves explained that "the federal tax is a discussion between the industry and the government. It has usually been like that in the past... We are sitting with the government. The industry is sitting with the government as we speak to find out where this will end." He went on to say, "I think one thing we can say is it's a different moment. When we sat down with the government last year, it was a moment where growth and jobs and everything were more important. They are always important, but they were more important. So the government sought the proposal that was sort of put together with the whole industry and the government about not moving federal tax at all. That's what happened last year, so we had no movement at all. It's normal to expect something in the sense that there is no room for a zero tax increase."

23 See ITSEM strategic plan at <http://sitios.itesm.mx/webtools/planestrategico2020/publico/EN/document/2020StrategicPlan.pdf>

Another policy-related issue is the extent to which a country's economy depends on alcohol production and foreign trade. Several countries in South America (e.g., Argentina, Chile) are well known for their wines; and the Caribbean is celebrated for its high-quality rum. In many parts of the region, alcohol is seen as an important contributor to business opportunities and jobs in the agricultural, hospitality, and retail sectors. For example, in April 2014, Heineken announced it would invest US\$ 100 million over five years in its Brasserie Nationale d'Haïti, S.A., also called BRANA. During a time in which many international companies have been reluctant to spend money in the country, the BRANA's DG explained that Heineken is eager to invest more "because political stability and cooperation have improved under the current government." In a publicized visit to the brewery, Prime Minister Lamothe congratulated Heineken for investing several million dollars into Prestige beer. "We want to thank the leaders of this company who decided to invest 100 million USD for Prestige beer in order to create direct and indirect jobs in the country." The investment was expected to enable BRANA to double the output for Prestige and other beverages, along with launching a 16-ounce bottle of Prestige (Belfort, 2014).

Use of financial incentive and structural power

The industry is also known to request a "seat at the table" based on their economic contributions. According to its website www.cerveceroslatinoamericanos.com, the trade association Cerveceros Latinoamericanos "represents an important economic sector in each country, generating direct and indirect employment, advancing the growth of related sectors and contributing to national economies by paying taxes and contributing to the GDP." Similar statements are documented in the Caribbean (CBA, 2006; 2008), Colombia (SAB Miller, 2014).

Legal action

When governments propose new regulations, there have been cases where the industry threatens or even institutes legal action against alcohol policies. There have also been cases where the industry circumvents existing laws, particularly regarding marketing restrictions. Legal action may also influence the development of trade and investment agreements.

Threat of legal action

Brazil has had one of the highest rates of soccer-related violence. In 2003, the country banned alcohol sales at stadiums in an effort to curb the violence. However, due to a multimillion-dollar contract the Fédération Internationale de Football Association (FIFA) had with InBev's Budweiser as a sponsor for the 2014 World Cup, the organization requested that the country suspend the ban in order to host the tournament. "Alcoholic drinks are part of the FIFA World Cup, so we're going to have them," FIFA secretary general Jerome Valcke said in January 2012. "Excuse me if I sound a bit arrogant, but that's something we won't negotiate." While many lawmakers opposed lifting the ban, the 'Lei Geral da Copa' was passed in June 2012. The new law eliminated the article banning alcoholic beverages from soccer games during the World Cup. While Brazil does not keep official records on crime and violence specifically related to the use of alcohol during the event, studies conducted in the United Kingdom have documented increased admissions as a result of assaults (Quigg, Hughes, & Bellis, 2013) and increased risk of domestic abuse (Kirby, Francis, & O'Flaherty, 2014) during and after football matches.

Towards the end of the 2014 tournament, even Valcke confessed he was "worried" that fans were drinking too much. "I was surprised by the level of alcohol. A lot of people were drunk, which can raise the level of violence." Following Valcke's television interview, the state prosecutor's body threatened to open a civil suit against FIFA if it did not restrict alcohol sales in stadiums for the remainder of the event. FIFA responded that it did not intend to review its policy. No civil suit was filed. Public health advocates, such as Professor Ronaldo Laranjeira from the University of São Paulo, worried that the temporary suspension of the ban could be made permanent: "The sports minister has said all along that he supports this change and, worse than that, he supports the idea that after the World Cup alcohol should continue to be allowed in the stadiums. The power of the alcohol industry is incredible." (Gornall, 2014a). As predicted, several Brazilian Legislative Houses tried to alter

state regulations to allow alcohol sales in stadiums. Sao Paulo state, for instance, went so far as to have the law approved, but the state governor vetoed it (Inside, 2017).

Using litigation to block advancement of legislation

A bill to further restrict the advertising and labeling of alcohol in **Chile** was subject to postponement in Congress for many years (Global Advertising Lawyers Alliance, 2013, 2015). Initially, the bill included a ban on sports sponsorship. However, this item was removed during the legislative process.

A consumer association in **Brazil**, the Brazilian Association for the Defence of Consumer Health (Saudecon), filed a lawsuit against Kaiser Brewery Brazil for labelling and advertising one of their products as non-alcoholic. The court agreed that the label lacked essential information on the fact that the beer contained a minimum percentage of alcohol, which could trigger health risks to some consumers, especially those who may be alcoholics. According to the court, Kaiser violated the Consumer Protection Code “to the extent that there is information on the marketed product that does not reflect the reality, which prevents its marketing as presented.” Therefore, the producer was ordered to remove all bottles labelled and advertised as non-alcoholic from the market. The producer appealed the case before the Superior Court of Justice (Revista Consultor Jurídico, 2015).

In **Colombia**, legal action was brought against the promotional advertising of alcohol during a large soccer championship with games scheduled during weekend afternoons. The suit claimed that such advertising should be banned because it runs during hours when alcohol ads are normally restricted, and because a link is created between alcohol and the national sport of soccer. Authorities overruled the petition to temporarily suspend broadcasting while the Court gave its final ruling. In **Brazil**, where only beer falls under self-regulation, the Brazilian Psychiatric Association and the Brazilian Association of Alcohol and Drugs filed a lawsuit with the Supreme Court to require Congress to amend the definition of “alcohol” to include beer (the current law defines alcoholic beverages only as those with 12 GL degrees or more)—which would effectively end self-regulation. However, after opposition from the alcohol industry, the court unanimously decided in May 2015 that the Brazilian judiciary cannot interfere with the political activity of the National Congress, meaning that the

decision to modify the legal definition of alcoholic beverages for advertising purposes comes exclusively under the political jurisdiction of Congress. Therefore, self-regulation remains in effect.

Circumvention

Despite a 2008 ban on alcohol sales in roadside businesses²⁴, AB InBev in 2014 launched ‘Pit Stop Skol kiosks’ in **Brazil**, or alcohol vending machines, in an effort to improve brand penetration and increase sales. Located in the parking lots of supermarkets and in large urban centers, consumers were able to purchase beer without getting out of their car (Euromonitor, 2014).

Alcohol advertisements frequently violate the marketing regulations and the industry’s own self-regulation codes. In 2013, Ambev was fined by the Guatemalan Health Ministry for running soccer-related advertisements without government approval. In **Brazil**, Ambev (now part of AB InBev) faced significant backlash for a Skol marketing campaign that appeared to be condoning rape. Following a counter-campaign and fierce criticism over social media, Ambev pulled the ads.²⁵ In 2015, the Brazilian Advertising Self-Regulation Council (CONAR) brought a claim against AmBev for an internet sales campaign that offered a free pack of beer with any purchase of two packs (“buy two, get one free”). AmBev, however, argued that the campaign did not promote excessive consumption as there was not an actual image of alcohol ingestion (Global Advertising Lawyers Alliance, 2015).

In a 2014 campaign promising to postpone an increase in taxes on cold drinks, AmBev announced the “Verão sem Aumento” (Summer without increase) in 500,000 participating on-trade outlets in **Brazil** (Euromonitor, 2014). Businesses taking part in the campaign received a sign that the consumer will not pay an increased price. Corporate director of pricing and finances for Ambev Brazil, Marcelo Michaelis explained, “The idea is to keep the price, sell more and thus recover the fall in consumption and sales over 2013, which was a lower point than 2012”. After the ‘summer without increase’ ended in March, the company announced “Copa sem Amumento” (Cup without increase), a commitment not to increase their prices through the end of the World Cup.

24 Frayssinet, F. (2008, Jan 31). Brazil: Ban on Alcohol Sales in Roadside Businesses. Inter Press Service. <http://www.ipsnews.net/2008/01/brazil-ban-on-alcohol-sales-in-roadside-businesses/>

25 See story here <http://www.triplepundit.com/2015/02/accused-condoning-rape-brazilian-beer-company-drops-carnaval-ad-campaign/>

Seeking amendment to laws

In **Chile**, a bill mandating that 25% of the label be occupied with a health warning was amended to between 8 and 12.5% of the label after years of industry opposition. Other forms of opposition to labelling policies are conducted less openly. For example, researchers have identified the use of federal and international trade regulation as a deliberate business strategy (e.g., Schuler, 1996). Under investor rights

provisions, corporations can sue for “expropriation” of property as a result of regulations on ingredient disclosure and warning labels. Tobacco companies have argued that such information is protected by Trade-Related Aspects of Intellectual Property (TRIPS) (Shaffer, Brenner, & Houston, 2005). Similarly, the Trans-Pacific Partnership, when implemented, could prevent countries from mandating health warnings in line with the recommendations described above.

Comments

The cases described in this section indicate that political donations and financial incentives are bipartisan and may be effective at promoting the industry’s agenda. Donations such as these could result in influence over an organization or individual by creating financial conflicts of interest, reputational damage and dependence on continued funding (Adams, 2016; Barnes & Bero, 1996).

Another important issue regarding alcohol policy is the number of countries whose economies are highly reliant on alcohol production. For instance, several countries in South America (e.g., Argentina, Chile) are well-known for their wines and the Caribbean is celebrated for its high quality rum. In many parts of the region alcohol is seen as an important contributor to business opportunities and jobs in the hospitality and retail sectors. The historical, cultural and economic roots of the industry, combined with its extensive campaign contributions to political parties and politicians, create the conditions for a strong industry influence in the political process. With the addition of SAPROs and trade associations, and highly concentrated bulk distribution networks that have lower profit margins, the alcohol industry has become more capable of broadening its population reach and political influence.

Legal actions such as litigation (or threat of litigation), and circumvention of laws and regulations are effective industry tactics because of the costs involved in defending legal challenges. Local and municipal governments often do not have the resources to become involved in protracted litigation, even when the case is based on sound legal precedent.

Alcohol control policies in public health are aimed at decreasing per capita consumption to minimize alcohol problems. According to an impressive amount of evidence (Babor et al., 2010), universal measures to raise the price of alcohol and control its availability are the most effective policy options. The industry consistently opposes regulatory and statutory approaches that apply to the entire population and instead champions voluntary action, alongside targeted interventions that focus on a minority of heavy drinkers. The main arguments used by the industry to justify its approach are commercial speech, economic freedom, job creation and economic benefit. More recently, arguments concerning the administrative efficacy of the industry, as opposed to the public sector, have also been used to justify industry’s involvement in public health.

Regarding the tactic of circumvention, drive up kiosks such as those used in Brazil were banned in 2000 in Japan after being found to contribute to underage drinking (Osaki et al., 1999) and alcoholism. Drive-up liquor sales have also been found to contribute to traffic fatalities (Lapham, Gruenwald, Remer, & Layne, 2004) and high-risk drinking behaviors in New Mexico (Lewis, Lapham, & Skipper, 1998). It is important to note however, that while the elimination of drive-up alcohol purchase options does limit alcohol sales and impact drink driving to some extent, it does not fundamentally alter the pervasive nature of widespread alcohol availability through on- and off-premise alcohol sales.

Public health implications: What is the likely impact of alcohol industry strategies and tactics on public health?

Having described the alcohol industry's commercial and political activities in the LAC region, and their likely impact on alcohol consumption, we now discuss the six major policy issues at which the industry strategies are often directed. This section borrows heavily from the scientific literature to indicate how the current activities of the alcohol industry represent a significant threat to public health. The degree of threat can be gaged in terms of the industry's ability to stop or mitigate measures designed to promote effective alcohol control policies, as reflected in the WHO Global Strategy and the SAFER initiative. Both of these initiatives focus on three "Best Buys" as well as drink driving measures as key policy issues that could reduce alcohol-related problems significantly, in contrast to the ineffective policies typically favoured by the alcohol industry.

SAFER is a public health initiative consisting of five high-impact strategies recommended in the WHO Global Strategy to reduce the harmful use of alcohol. The strategies are designed to **Strengthen** restrictions on alcohol availability; **Advance** and enforce drink driving countermeasures; **Facilitate** access to screening, brief interventions, and treatment; **Enforce** bans or comprehensive restrictions on alcohol advertising, sponsorship, and promotion; and **Raise** prices on alcohol through excise taxes and pricing policies.

With the possible exceptions of screening, brief interventions and treatment, which the industry only partially supports, and certain drink driving interventions, the alcohol industry's strategies and tactics have consistently undermined SAFER recommendations (Rekve et al., 2019). In the following sections, the public health implications of the alcohol industry's strategies and tactics are described in the context of the WHO SAFER initiative.



Although some progress and commitments from government agencies in Mexico to adopt and strengthen policies and programmes to reduce alcohol consumption, a 2020 shadow report from the Mexico Salud-Hable Coalition revealed slow progress on SAFER policy measures, in part due to undue influence of industry on policy making. (Mexico Salud-Hable, 2020)

Opposition to controls on alcohol availability

A key focus of industry strategies is opposition to controls on alcohol availability. The availability of alcohol is affected by policies on trading hours, density of liquor outlets, and the range of places in which it is sold. As suggested in this review of industry activities in the LAC region, alcohol products are now increasingly being sold in supermarkets and gas stations, and at sporting events, festivals and concerts.

The evidence that alcohol availability has a direct effect on population level consumption, thereby also affecting alcohol-related problems, has been well documented in individual studies (Carlini & Sanchez, 2018; Rush, Gliksman, & Brook, 1986; Gruenewald, 2007), systematic reviews (Ravn, 1987; Rabow & Watts, 1983; Single, 1988), and narrative reviews (Babor, Robaina, & Jernigan, 2015; Jernigan, 2015). It is also reflected in the alcohol industry's annual reports. According to Grupo Modelo's 2011 annual report: "In the majority of the Latin America and Caribbean

markets, we continued to work on programs focused on increased distribution and sales coverage, and we used different versions of the Transforma tus momentos campaign, resulting in an increase in volume of more than 35%." By the same token, alcohol bans enforced in Colombian cities during the World Cup resulted in a 6% decrease in sales for SABMiller, according to their quarterly trading report²⁶. Studies conducted in Brazil (Duailibi, et al., 2007; Carlini & Sanchez, 2018), Colombia (Sánchez, et al., 2011; Mena, Sánchez, Gutiérrez, Puyana, & Suffoletto, 2014) and Peru (Malaga, Gonzalez, Huaco, & Sotelo, 2012) found a decrease in homicides, interpersonal violence and road traffic mortality after the implementation of policies that limited alcohol availability.

One evidence-based public health measure based on availability theory proposed in the WHO Global strategy and the SAFER initiative is to restrict the sale of alcohol in time (e.g., restricting the opening hours of bars) and place (e.g., banning the sale of alcohol in gas stations). Additionally, restricting alcohol consumption in public places can further reduce alcohol-related harm, especially unintentional injuries and interpersonal violence. Because restrictions on alcohol availability are considered detrimental to industry efforts to expand markets and sales, a variety of tactics are used to promote availability and reduce regulation.

The impact of changes in availability will depend on local circumstances (Abbey, Scott, & Smith, 1993). As such, changes occurring across a country have an impact (Gruenewald, Ponicki and Holder 1993; Wagenaar and Holder 1996), whereas when changes in availability are more local, there may be no observable impact (Gruenewald et al., 2000) as it is possible to travel outside the local geographic area to obtain alcohol. Furthermore, similar restrictions in local areas can produce different effects. For example, a 10% reduction in the number of outlets may have an insignificant effect in a high density area, while the same reduction may result in the elimination of the only outlets easily accessible by drinkers in a low density area. Nevertheless, the industry's opposition to controls on alcohol availability is a strategy that has significant implications for public health.

Opposition to public health policies on pricing and taxation

Increasing the price of alcohol, for example, through excise taxes, can be an effective means to reduce underage drinking and prevent drinking problems in the general population (Babor, et al., 2010; World Health Organization, 2010). This is especially true for

beer, the most popular alcoholic beverage consumed by youth (NRC and IoM, 2003). As documented in the numerous examples described in this report, the industry actively opposes tax increases. Similar to other alcohol control policies, the industry's opposition to increases in alcohol taxes include a variety of tactics to prevent tax and pricing increases.

Despite hundreds of studies showing that alcohol is highly sensitive to price and price increases reduce alcohol-related morbidity and mortality (Wagenaar, Salois, & Komro, 2009), the alcohol industry in the LAC region frequently oppose excise tax increases and actively support policies that lower the price of alcohol. Arguments that tax increases result in reduced employment opportunities are not supported by econometric studies (Anderson & Baumberg, 2010). Whatever gains made in jobs and taxes are actually lost due to the impact on the public's health. As suggested by the examples above, the net effect of these measures is to delay or prevent tax policies that are designed to promote the public good.

Opposition to effective controls on alcohol marketing

The impact of industry opposition to effective controls on alcohol marketing, and their targeting of young adults and women through digital marketing and the promotion of new products designed to appeal to these population segments, have important implications for public health.

Regarding young adults, Jernigan, et al. (2017) conducted a systematic review of longitudinal studies published since 2009 that examined exposure to advertising and its effect on drinking among underage persons. All 12 found a positive association between marketing exposure and one or more alcohol consumption outcomes, including early initiation of alcohol use and subsequent hazardous or binge drinking. This and other evidence from hundreds of studies of alcohol marketing led to the conclusion in an extensive review of the literature (Sargent and Babor, 2020) that alcohol marketing has a causal influence on youth drinking.

In addition to the risks to young persons, women's vulnerability to alcohol-related harms is highlighted as a major health concern in the WHO's most recent Global Status Report on Alcohol (2014). This is because women typically have lower body weight, smaller liver capacity to metabolize alcohol, and a higher proportion of body fat, which together contribute to women achieving higher blood alcohol concentrations than men for the same amount of alcohol intake. Women

26 See report at <http://colombiareports.com/colombias-world-cup-alcohol-ban-hits-global-beer-giant-sabmiller/>

are also disproportionately affected by interpersonal violence and risky sexual behavior as a result of the drinking problems (Kalichman, Simbayi, Kaufman, Cain, & Jooste, 2007; Testa, Quigley, & Leonard, 2003). Moreover, many societies hold more negative attitudes towards women's drinking alcohol than men's drinking, and especially towards their harmful drinking (Otto, 1981; Gomber, 1988; Pretorius et al., 2009), which, depending on the cultural context, may increase women's vulnerability to social harm. Alcohol use is also a risk factor for breast cancer (Allen et al., 2009; Boyle & Boffetta, 2009; Seitz et al., 2012; Griswold et al., 2018). Finally, women who drink while pregnant risk giving birth to a child with a fetal alcohol spectrum disorder (FASD) and other preventable conditions (Oei, 2020; United States National Institutes of Health, 2010; Viljoen et al., 2005).

Alcohol marketing is constantly evolving and utilizes multiple channels including youth radio, television, sport and music events, websites, social media, mobile phones and product placements in movies and TV shows. Currently, most countries in the region have some form of marketing regulation, but beyond partial bans on the timing and placement of advertisements, most countries rely on industry voluntary self-regulation. Marketers are increasingly moving to digital and social media, where regulatory and self-regulatory efforts have fallen far behind industry innovations in producing audience engagement and brand ambassadorship. Brand marketing can include advertising and sponsorship, as well as branding through image, packaging and association (WHO, 2017).

Only five LAC countries have policies that were considered in a WHO (2018) global survey as "restrictive or very restrictive," which amounts to 15.6% of the region. Venezuela has a ban on national TV and radio for all alcoholic beverages and restrictions in print media and billboards, while in the Bahamas and Brazil have a ban on national TV and radio for spirits only. In Peru, there is a ban on the marketing of wines and spirits on national TV and radio, while in Brazil, alcoholic drinks with more than 13 GL (most wines and spirits) are banned from TV and radio between 6am and 9pm. The majority of countries in LAC have no restrictions on TV, radio, print media and billboards for alcoholic beverages. To the extent that policies that limit exposure to marketing can affect sales, consumption levels and profits, the alcohol industry and its SAPROs promote self-regulation of alcohol advertising as a primary policy initiative. According to a review of the legal documentation

and health law literature (Noel, Lazzarini, Robaina, & Vendrame, 2017), the industry's voluntary marketing codes seem to have been implemented to prevent government regulations, as in the case of Brazil and Chile. In 2016, the three main trade associations for alcoholic drinks in Argentina, including companies such as Inbev, Heineken, Diageo and Pernod Ricard put out a set of self-regulating guidelines representing the whole alcohol industry. The code includes a regulation stating that ads should not imply alcohol is good for health. In Dominican Republic, a partnership between all sectors of the alcohol industry and the government resulted in a major Memorandum of Understanding (MoU) with the Ministry of Health and Welfare in 2016. The MoU included work in three fronts, including the creation of a unified marketing code among beer, wine and spirits producers.²⁷

Self-regulation, however, does not seem to be a viable way to protect young persons and other vulnerable populations from the effects of alcohol marketing. Systematic reviews of the international literature (Noel & Babor, 2015), including studies from Latin America, identified more than 100 publications that have examined the effectiveness of these codes in restricting objectionable content, reducing youth exposure, and adjudicating complaints to alcohol advertising and marketing practices. The research shows high rates of code violations have been found in multiple media, indicating that self-regulatory codes have failed to keep youth from being exposed to alcohol marketing and that there is no effective system for removing non-compliant advertisements and other materials. One study of five beer adverts popular with Brazilian teenagers found that all five were in breach of Brazil's code of marketing self-regulation (Vendrame, Pinsky, Souza E Silva, & Babor, 2010). Recently, a multi-country study conducted in Argentina, Mexico, Brazil, Canada and the US, as well as countries outside of LAC examined whether alcohol advertising shown during the 2014 FIFA World Cup in the various countries complied with alcohol industry self-regulatory codes. Findings (Noel et al., 2017) indicate that a significant proportion of advertising in these countries was out of compliance with industry self-regulatory content codes, and suggest that millions of young persons may have been exposed to these non-compliant ads in the countries evaluated.

Despite the available evidence, the industry and its allies have been successful in their efforts, as evidenced by self-regulatory agreements formalized in Mexico (ICAP, 2012) and elsewhere. As such, the regulation of marketing in the region is generally

27 For additional information, see IARD progress reports at: <https://www.iard.org/IARD/media/ProgressReports/Progress-Reports/2017-Producers-Commitments-full-report.pdf> and <https://www.iard.org/IARD/media/ProgressReports/Progress-Reports/2016-Producers-Commitments-report.pdf>

weak and vulnerable groups, especially children and adolescents, are exposed to potentially harmful images and other techniques that contribute to the early initiation of drinking and heavy drinking (Synder, Milici, Slater, Sun, & Strizhakova, 2006). This is consistent with the findings of an Expert Meeting on Alcohol Marketing Regulation that was held in 2015 at the headquarters of the Pan American Health Organization in Washington, DC, USA (Babor et al., 2017).

Because of the difficulties in enforcing alcohol marketing restrictions, policy experts recommend a total ban on alcohol marketing, promotion and sponsorship (Chisholm, Rehm, Van Ommeren, & Monteiro, 2004; Hollingworth, et al., 2006; Jernigan, 2013; Pan American Health Organization, 2015), which the industry consistently opposes. In the absence of such bans, current marketing practices by the industry will continue to recruit new drinkers among youth, and target other vulnerable populations.

Promotion of drink-driving measures and campaigns to demonstrate Corporate Social Responsibility

According to WHO, nearly 1.2 million people die in accidents on roads. Drink-driving is one of the main factors contributing to accidents – an individual is seven times more likely to die in a driving accident. In Latin America, the mortality rate from road accidents was 18 per 100,000 people in 2016, according to a report by PAHO. That compares to 9.3 in Europe and 56.0 in France (WHO, 2018). In countries like Paraguay and Dominican Republic, this figure goes up to 23 and 35 respectively (WHO, 2018). The alcohol industry actively highlights the problem of impaired driving in their CSR activities, focusing on punishment of alcohol-impaired drivers and designated driver campaigns rather than deterrence measures such as random breath testing. Simultaneously, most of the industry has actively resisted or tried to discredit policies to lower the legal permissible alcohol level or that point to server, seller and producer contributions to the problem. This suggests the use of these measures is a form of stakeholder marketing, which has been documented in a recent report by the US National Academies of Sciences (Babor et al., 2018).

Industry-sponsored designated driver and safe-ride campaigns are widespread. When stricter drink-driving laws were implemented in Colombia²⁸ and on-premise sales were negatively impacted, the industry

was able to recover lost revenues through a greater use of ride services (Euromonitor International, 2015). These efforts helped to draw attention away from the alcohol industry's role in blocking other effective policies and has given the appearance of extensive collaboration. The connection between government agencies and SABMiller's Panama subsidiary, CN, was mentioned in practically all ads and media coverage.²⁹

The United Nations Road Safety Collaboration (UNRSC) (World Health Organization, 2018), established in 2004 following General Assembly resolution 58/289 of April 2004, charges WHO with coordinating road safety issues within the UN System. In this context, both the WHO and public health experts (Pinsky, et al., in press) has expressed reservations about conflicts of interest between commercial actors and public health objectives, as indicated in the WHA resolution 65.6 action 3(3) which mandated WHO to 'develop risk assessment, disclosure and management tools to safeguard against possible conflicts of interest in policy development and implementation of programs consistent with WHO's overall policy and practice' (World Health Organization, 2012). Some of the road traffic safety programs promoted by the alcohol industry would appear to violate these principles. For example, in 2014 AB Inbev lead the establishment of "Together for Safer Roads", a self-described global road safety coalition. In 2018, Inbev signed a much-publicized partnership with UNITAR (the United Nations Institute for Training and Research) with the objective of globally reducing the number of road deaths. Among Inbev's described actions concerning this goal are offering "support and advice (to) government and other partners with knowledge-related services". These initiatives are linked to Inbev's projects in developing countries, including Brazil, and Mexico.³⁰

Through its promotion of drink-driving measures and media campaigns, major producers like AB InBev are not only able to prevent alcohol policies that reduce drink-driving, they also benefit from stakeholder marketing by associating their brands with the apparent solution of a well-known public health problem.

28 Law 1696, which came into force in December 2013, imposed stricter regulations on drink driving. More information available at <http://www.bloomberg.com/news/articles/2014-02-24/colombian-drunk-driving-crackdown-slows-sabmiller-growth>

29 For example, see <http://transito.gob.pa/node/10243>

30 For more information, see <https://www.ab-inbev.com/what-we-do/road-safety.html> and <https://www.togetherforsaferroads.org/>

Strategies during the Coronavirus/ COVID-19 pandemic

The Coronavirus/COVID-19 global pandemic in 2020 presented a challenge to the alcohol industry as several of its sales channels (e.g. restaurants and bars) were shut down or restricted in many countries. On the other hand, the pandemic also presented an opportunity to augment its CSR activities, including some that were, even at face value, very similar to or mixed with marketing activities (ACT,2020), such as the production and donation of alcohol-based hand sanitizers (e.g., AB InBev, 2020b).

These actions, described in **Box 1**, were publicized to show that the alcohol industry was being part of the solution, with general themes like: “Estamos Juntxs Nessa” [“we’re in this together”] (Heineken, 2020a) and “Juntos à Distância” [“together at a distance”] (Ambev, 2020).

BOX 1

Doing well by doing good, or a combination of clever marketing and lobbying against regulation?

Some of the industry programs that were launched during the height of the coronavirus pandemic in 2020 included the following:

Partnerships with other transnational corporations, especially the ultraprocessed food industry, to launch programs that were a mix of CSR and marketing. One example was “Movimento nós” (Movement us) that united 8 corporations (including Ambev, Heineken, Coca-Cola and Pepsico) to assist 300,000 small retail stores in Brazil during the pandemic. Among the actions, the transnationals agreed to facilitate payment conditions and assist retail establishments with economic and COVID-related information (Morton, 2020).

Actions leveraging their capacity to communicate with the consumers to support off-site sales channels included Tienda Cerca in Colombia, Program “Apoie um restaurante” in Brazil, (AB InBev, 2020c) and “Brinde do Bem” in Brazil (Heineken, 2020b).

In Mexico, “Tienditas Cerca”, a program conducted by Grupo Modelo in Mexico and CERVEPAR in Paraguay, offered a free online ordering platform for home delivery services to more than 12,000 retailers (Ze Delivery, 2020).

Livestream music festivals were a key marketing/CSR activity during this period, aggressively advertised through several social media channels. During several of these online encounters with popular musicians, there was a fundraising campaign with donations offered to several causes related to the pandemic (e.g., AB InBev, 2020c).

In Paraguay, Cervepar produced and donated thousands of bottles of disinfecting gel for the Ministry of Health. Another activity in several countries was the production of soaps made with cassava, used to produce cheap brand of beers. The soap package replicated the beer brands (AB InBev, 2020d).;

Ambev donated food products (tapioca) produced with cassava, a root used in the North of Brazil to produce a brand of cheap beer. The tapioca package includes a large sign connecting the product to the beer brand³¹.

Ambev funded the expansion of a public hospital in São Paulo city, in partnership with government (AB InBev, 2020b).³² A similar action took place in Colombia, where a new emergency hospital, co-funded by the Bavaria Foundation, opened in Barranquilla to treat patients suffering from the virus (AB InBev, 2020e).

31 See photo and description on AmBev’s Instagram account at https://www.instagram.com/p/B_25bKAJYcq

32 See post featuring contribution at <https://www.instagram.com/p/B-lisxRp9Za/>



© Hector Pertuz / Adobe Stock

Despite the philanthropic intent of some of these activities, at the same time the industry in many countries lobbied for the relaxation of regulatory controls, especially those connected with home delivery of alcoholic beverages and internet sales, and little was done to minimize the effects of alcohol-related social activities at bars, nightclubs, restaurants and parties on the spread of the virus. No examples were found of industry involvement in disseminating information about the effects of alcohol consumption on immune response and social distancing precautions. The net effect of these activities was considered by some observers as detrimental to public health (Pinsky et al., in press; Monteiro et al., 2020).

Summary

The commercial and political activities of the alcohol industry in LAC countries documented in this report, and their effects on the implementation of effective alcohol control policies described in this section, are consistent with the theory of “corporation-induced diseases” (Jahiel, 2008), which posits that the influence of large corporations on governments contributes to the burden of disease and disability in countries and in communities. The theory has been used to explain how the large alcohol producers influence the alcohol

policy environment, which affects the availability of alcohol, per capita alcohol consumption, and the incidence of alcohol-related problems (Robaina and Babor, 2013; 2017). An epidemiologic cascade starting with government-sanctioned corporate profit making and ending with individual-level health and social consequences. The strategies developed by corporate decision-makers (e.g., new alcohol products, aggressive marketing of alcohol to young consumers, opposition to marketing regulations) are implemented by SAPROs, trade associations, and in some cases civil society organizations enlisted by the industry through financial contributions. As suggested by the way that industry tactics are mobilized to oppose the most effective public health measures included in the WHO SAFER initiative, the resulting modifications in the policy environment are likely to include increased alcohol availability, lower alcohol prices, aggressive marketing activities, which in turn translates into increased sales, greater alcohol consumption, and an increase in alcohol-related problems.

RECOMMENDATIONS

The alcohol industry activities documented in this report have practical implications for the various stakeholders involved in the development and enforcement of public health policies related to alcohol. This section considers how public health community, including the World Health Organization and its member state governments, might better define their own roles as well as the roles and the responsibilities of the alcohol industry in areas related to alcohol and public health in the Region. We close with a set of recommendations directed at the global alcohol producers as well.



Role of the World Health Organization

In setting and implementing their public health policies with respect to alcohol control, WHO and its regional office, PAHO, need to protect these policies from commercial and other vested interests. The WHO Global strategy on alcohol does not give the global alcohol producers a role in public health policy development or implementation. They are only encouraged to “consider effective ways” to address alcohol problems within their core roles, rather than as public health professionals. **In the view of former WHO Director General, Dr. Margaret Chan, the alcohol industry has no role in the formulation of alcohol policies** (Chan, 2013). The role of business interests in the implementation of the WHO Global strategy and related measures should be clearly limited so that policies and programs at all levels are developed on the basis of public health interests, independent of commercial influence.

WHO’s relationship with the private sector should therefore be informed by the following considerations:

As a matter of urgency, WHO should clarify the roles and responsibilities of economic operators in the implementation of the WHO Global Strategy, giving special attention to the activities expected of the developers, producers, distributors, marketers and sellers of alcoholic beverages.

Realize the mandate of the WHA resolution 65.6 action 3(3) to develop a risk assessment, disclosure and management tools to safeguard against possible conflicts of interest in policy development and implementation of programs consistent with WHO’s overall policy and practice.

Implement strong conflict of interest policies such that employees are required as a condition of WHO employment to avoid subsequent employment with commercial interests that represent or are substantially funded by the commercial alcohol industry for at least two years following termination of their employment with WHO.

Strengthening the provisions of the Framework of Engagement with Non-State Actors (FENSA) Guidelines to include specific references to the alcohol industry (WHO, 2016).

The WHO guidelines for implementing article 5.3 of the Framework Convention for Tobacco Control (FCTC) stipulate that governments must not enter into partnership agreements with tobacco companies. A similar recommendation should be followed by its Secretariat, member state governments, as well as affiliated NGOs, with respect to the alcohol industry, based on the industry’s obvious conflict of interest, their past performance in the region (documented in this report), and their lack of expertise in areas associated with the WHO Global strategy, the SAFER initiative and the COVID-19 recovery framework.

National Governments

National and local governments are often the targets for much of the CSR and political activities undertaken by the alcohol industry. It is recommended that national governments in the LAC region:

Establish funding sources independent of commercial and other vested interests to carry out research and public health advocacy work, for example by establishing a health promotion agency funded by taxation on unhealthy commodities including alcohol.

Establish an independent lead agency to address alcohol issues and advise on policy options. Such an agency should be protected from influence of commercial and vested interests.

Do not engage commercial or vested interest groups, or their representatives, in discussion on the development of alcohol policy. Commercial conflicts of interest should be made explicit, and input from these groups on implementation of policy must be critically evaluated in light of their vested interests.

Sponsorship activities and promotions in connection with activities targeting young people should be banned. In addition to strengthening marketing restrictions, health promotion strategies should work to combat messaging that incorporates alcoholic products and/ or the consumption of alcohol into the culture, particularly among young people.

Public health community, including research scientists, NGOs and other public interest organizations

Financial support from the alcohol industry and its third party organizations has the potential to affect professional judgment, and may strengthen the influence of private interests in the policy making process (Adams, 2016). Accepting alcohol industry support may adversely affect an individual's reputation and decrease public trust in an academic institution or nongovernmental organization. Research scientists, NGOs and other public interest organizations are advised to take these reputational issues into consideration. They should keep in mind that the evolution of ethical thresholds and standards in recent decades has generally been towards more stringent standards, for instance in the case of tobacco.

The following actions are warranted by the public health community:

Avoid funding from industry sources for prevention, research and information dissemination activities.
Refrain from any form of association with industry education programs.

Insist on industry support for evidence-based policies, and cessation of anti-scientific lobbying activities.

Insist on rigorous adherence to Conflict of Interest principles.

Support independent research in developing countries on non-commercial alcohol and alcohol marketing.

Make all information and details relating to funding and/or partnership work transparent and available for public scrutiny.

Support for evidence-based policy and cessation of lobbying against effective policies should be a pre-condition for any dialogue between the alcohol industry and the public health community.

These recommendations are supported by the CLARION Declaration (2008), issued by a coalition of concerned NGOs and professional societies, states that there is an inherent incompatibility between protecting the public from the harm done by alcohol and the alcohol industry's requirement to maximize profits by increasing sales, and thereby consumption, of its products. The Declaration concludes that "no funding relationships with the alcohol industry should be entered into".

Producers, trade associations and SAPROs

The alcohol industry has an ethical responsibility to minimize the harm caused by its products at all stages of the production chain, including product design and marketing. Ethical responsibility cannot be regarded solely as a national issue. Multinational corporations have a responsibility for their behavior all over the world, and should adhere to minimal ethical standards for responsible product design and marketing practices regardless of the country where their products are sold.

In particular, the global alcohol producers, their trade associations, and social aspect/public relations organizations should:

Reduce the alcohol content of existing products in order to minimize the toxic effects of chronic drinking.

Refrain from all marketing, sponsorship activities and product design innovations with high appeal to youth (e.g., caffeinated alcohols, alcopops, sweetened alcohol beverages) in order to protect children, young persons, high risk alcohol users and females in their child bearing years.

Refrain from further lobbying against effective public health measures.

Refrain from further engagement in health-related prevention, treatment, and traffic safety activities, as these tend to be ineffective, self-serving and competitive with the activities of the public health community (Babor et al., 2018).

Cease political activities designed to reduce or eliminate evidence-based alcohol control policies.

Refrain from direct funding of alcohol research because of the potential for agenda setting and bias owing to conflict of interest.

Respect the rules of science and the integrity of researchers and research organizations. They should quote and use the research in appropriate ways, and not use their sponsorship of scientific research for marketing or political lobbying purposes.

Refrain from scientific publishing through their own publishers. If they produce through other channels publications that claim to be scientific, they should follow rules of open scientific peer review and otherwise meet the standards of academic publishers.

Secure its own supply chains and cooperate with all aspects of the law when it comes to preventing the diversion of commercially produced alcohols to the informal market.

SUMMARY AND CONCLUSIONS

This report has attempted to critically evaluate the commercial and political activities used by the alcohol industry in LAC countries that have implications for public health. The alcohol industry has become an important part of the environment in which drinking patterns are learned and practiced in the LAC region, especially with the growth of modern industrial production, the proliferation of new products (e.g., caffeinated alcohol 'energy drinks' and alcopops), and the development of sophisticated marketing and promotional techniques.

Alcohol industry activities have been documented in a number of areas that conflict with a public health approach to the management of alcohol-related problems. The WHO (2019) SAFER initiative recognizes the need to protect public health-oriented policy-making from interference by the alcohol industry, particularly in relation to restrictions on alcohol availability, pricing and taxation policies, and bans on advertising.

This threat has increased significantly with recent trends in the organization and structure of the alcoholic beverage industry. With increased concentration comes increased wealth, and increased political and market influence. The concentration of the alcohol industry globally into a small number of large and powerful transnational alcohol corporations has increased the industry's capacity to act individually and in concert to influence national governments.

In addition to the industry's increasing concentration, its use of potentially harmful commercial activities (e.g., marketing) and their use of political activities to influence alcohol policy, this report has also documented a considerable number of Corporate Social Responsibility activities designed to promote a favorable image of the industry. Multiple tactics are often practiced simultaneously to achieve favorable policy outcomes. Far from being a passive supplier of alcohol products, the qualitative data presented in this report suggest that the industry is actively involved in promoting demand for alcohol in order to increase sales and profits, particularly in new market segments like women and young adults. In numerous examples from many countries, the industry's CSR activities were found to be at best public relations exercises and at worst direct attempts to promote ineffective policies and oppose effective policies.

The alcohol industry's activities in the Region are compromising the work of public health experts, the World Health Organization, the academic community, and NGOs working in the public health area to reduce with the burden of disease and disability attributable to alcohol.

This conclusion should be tempered by the limitations of the data and the methods used in the development of this report. Although the activities reviewed were primarily those of transnational companies, actions of the parent company and of its subsidiaries stem from national laws. Because political institutions vary across countries, so do the tactics (Baron, 1995; Hillman and Keim, 1995) and political outcomes. Therefore, the country examples listed in this report may not be generalizable.

Another limitation is the lack of internal alcohol industry documents describing their marketing plans, CSR activities, attempts to use and neutralize scientific information, etc. The lack of transparency in areas that pertain to public health is a disadvantage for those interested in promoting the public interest.

Finally, the results of this review of industry activities are largely based on anecdotal information that may be limited in its coverage and representativeness. Some activities designed to influence alcohol policy may not be reported in publicly available information sources. Many others have been reported by the industry as "industry actions" in support of the WHO Global Strategy, but they have been found to lack evidence of effectiveness and have been discussed in this report as part of a larger CSR strategy that is only indirectly aimed at alcohol policy.

Measuring the impact of industry influence in meaningful ways is challenging, and it is not always possible to directly measure the impact of industry tactics on the political process and on public health. According to Keim & Baysinger (1993, p. 126), "Popular rhetoric notwithstanding, serious students of business political activity still know very little about the effectiveness of various business efforts to affect political decision making". This report does, however, provide strong evidence for the epidemiologic cascade theory that describes the process through which corporate policy compromises public health. It suggests that the influence of the large transnational alcohol corporations on the policy environment is manifested through a network of major producers, proxy organizations and affiliated interest groups. Using strategies and tactics borrowed from the tobacco industry, public health measures have been difficult to implement even when there is strong scientific evidence of their effectiveness. For want of better alcohol policy, thousands of premature deaths and millions of disability-free life years lost could have been prevented but for the negative influence of the alcohol industry in LAC.

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APPENDIX A

SAMPLE OF KEYWORD TERMS USED IN LITERATURE SEARCHES

(1)

"Alcohol industry" OR "Cerveceros Latinoamericanos" OR ("Latin American Brewers Association") OR SABMiller OR Bavaria OR Backus OR Diageo OR Heineken OR "International Center for Alcohol Policies" OR 'International Alliance for Responsible Drinking' OR 'Fundación de Investigaciones Sociales' OR CISA

(2)

Prevention OR education OR
"mass media" OR campaign* OR ("corporate social responsibility" OR CSR) OR partnership\$

"warning labels" OR label*

"drink driving" OR "road traffic safety" OR "breath test*" OR "check points" OR zero-tolerance

(restriction* OR regulat* OR law*) OR (day\$ OR hour\$ OR "time of day" OR time OR availability OR limit)

tax* OR cost* OR pric* OR levy

advertis* OR marketing OR promot* OR "self regulat*" OR "voluntary codes"

((illegal OR unrecorded OR informal) AND alcohol)

Polic* OR "World Health Organization" OR litigation OR lobby* OR government* OR donation\$

(3)

"Latin America" OR Caribbean OR "South America" OR "Central America" OR Argentina OR Brazil OR Chile OR Colombia OR "Costa Rica" OR Ecuador OR Guatemala OR Grenada OR Haiti OR Honduras OR Jamaica OR Mexico OR Uruguay OR Peru OR Panama OR Puerto Rico OR Suriname OR Venezuela

*Search (1) AND (2) AND (3)



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