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Report Says Global Alcohol Consumption Could Fall by Half by 2050

Health concerns and tighter regulation are driving a structural decline that could force drinks makers to reinvent growth strategies

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Alcohol consumption could fall by half worldwide by 2050, according to a new report from the Munich-based consulting firm Roland Berger, which says the decline is being driven by stronger health concerns among consumers and tighter regulation across both emerging and mature markets.

The report, “The Future of Alcohol: Tech, Politics, and Structural Decline,” argues that the downturn is no longer cyclical but structural. It says per-capita alcohol consumption was already declining or flat in every global region between 2014 and 2024. Roland Berger cites annual compound declines of -1.1% in North America, -0.7% in Western Europe and -1.3% in Asia-Pacific over that period.

The study also points to a widening regulatory gap between developing and mature markets. According to Roland Berger, developing markets are tightening alcohol rules at nearly twice the pace of mature ones, with an average of 3.5 regulatory changes a year compared with 2 in mature markets. The firm says that combination of public health pressure and faster policy intervention could reshape the industry over the next two decades.

For wine, beer and spirits producers, the forecast matters because it suggests that future growth may depend less on traditional volume sales and more on adaptation. The report says the luxury segment has been the main area of resilience and is expected to remain so, while broader consumption weakens.

Roland Berger says one of the clearest responses for beverage companies is to invest earlier in no- and low-alcohol products as well as functional drinks. It describes growing demand from “sober curious” consumers, especially Millennials and Gen Z drinkers who are choosing to reduce alcohol intake for health reasons. In that view, beverages with little or no alcohol, along with products designed to preserve some of alcohol’s social or emotional effects without the same health impact, are likely to expand quickly.

The report says those functional drinks are being developed with plant extracts such as kava and golden root, as well as newer synthetic ingredients. It argues that beverage makers should include functional components in new product development if they want to stay relevant with younger consumers whose drinking habits differ sharply from previous generations.

The study also says artificial intelligence will become more important across the alcohol value chain, from farming to consumer marketing. One example it highlights is flavor-based consumer engagement, where pairing suggestions move beyond standard rules such as white wine with fish and instead use AI to combine food choices with mood,

personal data, genetic information and environmental conditions.

That approach could be especially relevant for wine producers trying to defend value in a shrinking market. Rather than relying only on conventional food pairing or appellation-driven messaging, producers may increasingly look to personalized recommendations tied not just to meals but also to time of day, weather and consumer preferences.

Roland Berger also points to precision agriculture as another major area for AI adoption. In addition, it says biological innovation around yeast is opening possible new revenue streams beyond fermentation itself. The report describes yeast as evolving from a basic production input into a broader biological platform, with upcycled yeast cells potentially finding scalable uses in agriculture through biostimulants as well as in health and beauty products.

On regulation, the firm says alcohol companies will need to move away from resisting policy change and toward working more closely with governments and regulators. It argues that companies able to collaborate on standards for sustainable alcohol production and responsible consumption may be better positioned than those that simply react after rules are imposed.

That shift could have broad implications for the beverage sector, particularly in markets where lawmakers are moving faster on labeling, advertising, health warnings or retail restrictions. If Roland Berger’s scenario proves accurate, producers may face pressure not only to reformulate products but also to change how they communicate with consumers and how they present alcohol within a health-conscious lifestyle.

Stefano Sorrentino, a Roland Berger partner and co-author of the report, said the alcohol industry may need to follow a path similar to one taken earlier by tobacco companies. He said that sector responded more than a decade ago through heavy investment in research and development, the launch of products presented as potentially lower risk and an internal transformation strategy that helped restore growth while gaining support from both consumers and regulators.

Roland Berger’s argument is that alcoholic beverage companies now face a comparable turning point. In its view, faster innovation, wider use of technology and a more proactive stance toward public authorities will be necessary if producers want to offset long-term declines in drinking volumes.

The report does not present the projected 2050 drop as inevitable in every category or market. But it makes clear that companies betting on a return to past consumption patterns may be misreading the direction of travel. For an industry built for decades on expanding volumes, especially in mainstream segments, that would mean a fundamental reset in strategy across wine, beer and spirits.