

Centre for Policy Futures

Extending Alcohol Surveillance to Include Nolo Products

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Classification and surveillance priorities

Key points

Including alcohol-adjacent nolo products in alcohol surveillance can improve the interpretability of alcohol pricing.

A simple operational distinction between nolo generics and nolo lookalikes clarifies their respective relationships to alcoholic products and supports coherent surveillance design.

Nolo lookalikes are a high-information starting point for surveillance, providing product-level price comparison. Over time, nolo generics can add category-level context.

Recent correspondence in *The Lancet Public Health*¹ has highlighted the potential value of monitoring no and low alcohol (nolo) products with matched alcoholic counterparts as a means of improving the interpretability of alcohol pricing data. This brief builds on that insight by clarifying how nolo products collectively can be incorporated into surveillance through coherent classification that supports comparison and prioritisation.

Alcohol surveillance and its current boundaries

Routine alcohol surveillance focuses on excise-bearing products and draws on a well-established set of indicators relating to prices, availability, product categories, and marketing controls^{2,3}. These systems were designed to monitor markets in which regulatory status, product definition, and fiscal treatment largely coincide.

Recent changes in the retail landscape, however, have introduced alcohol-adjacent products that fall outside these established boundaries while closely resembling alcoholic beverages in form and presentation⁴. The exclusion of such nolo products reflects historical design assumptions rather than deliberate analytical choice. As nolo products increasingly share branding, formats, and retail placement with excise-bearing alcohol, surveillance boundaries risk becoming misaligned with how prices are structured and encountered in practice.

What current surveillance cannot observe

Because nolo products are not routinely surveilled, several standard price relationships remain unobserved, including relative price levels between alcoholic products and alcohol-free variants, pricing across purchase formats, and patterns of availability and promotion.

These limitations do not reflect a lack of retail data. Comparable price and sales information is typically available for both excise-bearing alcohol and nolo products through the same retail channels. The constraint lies in how surveillance systems recognise and organise products for comparison and interpretation. As currently used, the term nolo (sometimes styled “NoLo”) is too undifferentiated for surveillance purposes, grouping together products with materially different relationships to alcohol and providing limited guidance for prioritisation or comparison.

Nolo generics and lookalikes

As an initial step, integrating nolo products into surveillance requires a basic distinction between generic and lookalike products. Nolo generics broadly imitate an alcohol sub-category (such as beer, wine, or spirits) without being presented as variants of a specific branded alcoholic product. Nolo lookalikes, by contrast, are marketed as alcohol-free variants of a specific alcoholic product, sharing brand identity, naming cues, and retail formats.

	Nolo generics	Nolo lookalikes
Defining feature	Imitate an alcohol sub-category (e.g., beer, wine, spirits)	Imitate a specific branded alcoholic product
Position on imitation continuum	Sub-category imitation	Product-identity imitation (includes sub-category features)
Examples (Australia)	Heaps Normal (no direct alcoholic beer counterpart)	Heineken 0.0 (variant of Heineken beer)
Unit of comparison enabled	Alcohol sub-category	Matched alcoholic product
Dependencies	Surveillance of corresponding alcohol category	Surveillance of relevant branded alcoholic counterparts
Purpose of distinction	Enables inclusion of alcohol-adjacent products where no product-level comparator exists	Enables direct product-level comparability with minimal confounding

Surveillance roles of nolo generics and lookalikes

The pricing of each nolo sub-type conveys different information and therefore warrants differentiated surveillance. Nolo generics are most informative at the category level, helping to contextualise price positioning, segmentation, and the broader structure of alcohol-adjacent markets. Their pricing patterns are less suited to product-level comparison but can illuminate how non-alcoholic substitutes are positioned relative to alcoholic categories as a whole.

Nolo lookalikes, while fewer in number, merit particular surveillance attention. These products closely mirror the branding, naming, packaging, and retail formats of specific alcoholic beverages. This close alignment provides a natural product-level comparator, allowing alcohol-adjacent pricing structures to be observed with minimal confounding. They also tend to be more widely distributed due to the recognition of their alcoholic counterparts and are therefore more relevant for routine monitoring at scale.

The table offers examples of price relationships that become observable through extended nolo surveillance.

Observation	Product scope	What becomes observable
Format-level price ratios	Nolo lookalikes vs matched alcoholic products	Relative price ratios across purchase formats (e.g., single units versus multipacks or bottle sizes), describing how prices are structured across formats for paired alcoholic and nolo products
Comparative absolute prices	Nolo lookalikes vs matched alcoholic products	Absolute price differences between alcoholic products and their nolo variants, including whether alcohol-free variants are priced below, at parity with, or above their alcoholic counterparts
Category-level price positioning	Nolo generics vs alcoholic sub-categories	The position of nolo generics relative to the observed price distribution of corresponding alcohol categories (e.g., beer, wine, spirits)
Price movement around excise changes	Nolo lookalikes and nolo generics	Relative changes in nolo and alcohol prices following excise adjustments, describing whether price movements align or diverge
Retail context price differences	Nolo lookalikes and nolo generics	Differences in pricing across alcohol-licensed and unlicensed retail contexts (e.g., supermarkets)

A minimal, phased extension

Extending alcohol surveillance to include nolo products does not require new regulatory powers or changes to existing pricing policy. It involves a modest refinement of existing surveillance practice to identify and report on alcohol-adjacent products that mirror alcoholic beverages in form, branding, and retail presentation.

In practice, surveillance can give initial emphasis to nolo lookalikes. These products are few in number and readily identifiable in relation to specific alcoholic counterparts, enabling product-level price comparison through a clearly bounded extension. Surveillance of nolo generics can then provide complementary category-level context where no product-matched comparator exists.

Coherent, up-to-date surveillance

Surveillance systems determine which price relationships can be observed and compared. As nolo products become more prominent, legacy classification boundaries risk creating descriptive gaps that limit how alcohol prices are described and understood.

Recognising the distinction between nolo generics and nolo lookalikes addresses this problem directly. It clarifies which comparisons are analytically meaningful, supports prioritisation within surveillance systems, and ensures that extended monitoring adds interpretive value.



References

1. Shackell, C. (In press). Nolo drinks: a useful comparator for alcohol pricing policy. *The Lancet Public Health*.
2. World Health Organization (n.d.). *Global Information System on Alcohol and Health*. Geneva: World Health Organization.
3. World Health Organization (2018). *Global status report on alcohol and health*. Geneva: World Health Organization.
4. World Health Organization (2023). *A public health perspective on zero- and low-alcohol beverages*. Geneva: World Health Organization.

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