

# INFORMATION ON THE NORDIC ALCOHOL MARKET 2018



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## Introduction

**THIS IS THE 19TH EDITION** of “Information on the Nordic Alcohol market”, a statistical report that provides facts and figures on alcohol policy and alcohol consumption in the Nordic countries.

**The report focuses on two aspects of the Nordic alcohol market;**

- 1)** The development of the state retail alcohol monopolies in Finland, Sweden, Norway, Iceland and the Faroe Islands in terms of data on pricing policies, personnel, number of brands, packaging, social control and sales figures.  
This information is retrieved directly from Alko, Systembolaget, Vinmonopolet, ATVR and Rúsdrekkasöla landsins respectively.
- 2)** The broader picture of alcohol policy and consumption in the countries mentioned above, plus Denmark which has no tradition of state alcohol monopolies.

**ALKO INC.** has gathered this information since 1999. The report was initially intended for internal purposes, but since Alko decided to publish it in English fifteen years ago it has been distributed broadly to the Nordic Monopolies as well as to alcohol Monopolies in Canada in the United States, civil servants working with public health, the research community and other relevant stakeholders.

The report can be found in Julkari. Julkari is an open publications archive common for the administrative branch of the Ministry of Social Affairs and Health.

**THIS PUBLICATION** has been compiled by M.Soc.Sci Mikaela Lindeman.

# Country profiles

## Finland

Finland has a population of 5.5 million people with borders to Sweden in the west, Norway in the north and Russia in the east. The unemployment rate was 8.6% in 2017.

Alcohol advertising has been permitted under certain conditions for mild alcoholic beverages since 1995 when Finland became a member of the European Union. In 2015, Finland was one of the first countries to introduce comprehensive regulation of alcohol advertising on social media, in order to protect young people.

A comprehensive reform of the Finnish Alcohol Act approved in December 2017 brought along changes to the Finnish alcohol markets, some of which entered into force in January 2018 and some in March 2018. Among the most important changes for off-premise sales:

- The definition of alcohol changed from 2.8 vol. % to 1.2 vol. %
- Grocery stores, which previously had been allowed to sell fermented beverages with max 4.7 vol. %, gained the right to sell beverages up to 5.5 vol. %. State alcohol monopoly Alko remains the only retailer of beverages stronger than 5.5 vol. %, but
- micro breweries are now allowed to apply for a license for selling their own products.

However, the lion's share of the data collected for this report focuses on 2017, i. e before the introduction of the new Alcohol Act.

The age limits for purchasing alcohol in Finland are 18 for mild beverages and 20 for beverages stronger than 22 vol. %. For on-premise sales in restaurants and bars the age limit has been set to 18.

Alko was founded in 1932, and 2017 there were 355 Alko shops all across the country, completed with around 60 pick-up points, and a web shop allowing customers to order goods online and pick up the parcels at Alko store or pick-up point. The most common opening hours were between 9-20 on weekdays, and 9-18 on Saturdays, on average 64 hours per week. In March 2018, in connection to the new Alcohol Act mentioned above, the opening hours were prolonged. Around 2,400 people work at Alko, headed by CEO Leena Laitinen.

Finland cut the taxation of alcoholic beverages dramatically in 2004 as an attempt to battle border trade with alcohol to Estonia, which had joined the European Union the same year. Since 2008 the tax levels have been increased 6 times.

Sales of red and white wine accounted for almost half of Alko's total sales during 2017.

The monopoly's share of the total alcohol consumption was 33%. According to a survey 60% of the population agreed that Alko and its sole right to off-premise retail sale of alcohol is a good way of controlling the harmful effects of alcohol, and a customer satisfaction survey gave the monopoly 8.52 points out of a possible 10.

The total consumption of alcohol per capita 15 years or older landed on 10.3 litres of pure alcohol in 2017, with beer as the most popular beverage. The unrecorded consumption consisted of 18.5% of the total consumption, a majority of which is alcohol purchased as border trade in Estonia.

## Sweden

Sweden is the largest Nordic country both considering square kilometers and population, which reached 10 million inhabitants during the year of 2017. Sweden is located in the heart of Northern Europe with Norway in the west, Finland in the east and Denmark in the south, connected through the Öresund bridge. The unemployment rate was 6.6% in 2017.

Alcohol is defined as a beverage stronger than 2.25 vol. %. Advertising of alcohol containing no more than 15 vol. % is allowed under certain conditions in printed media. Up until 2003, alcohol advertising was banned in all shapes and forms.

State monopoly Systembolaget has the sole right to retail alcohol with the exception of "Folköl", or "People's beer" that has max 3.5 vol. % and can be sold in grocery stores, kiosks and gas stations. There are 440 Systembolaget-stores and 457 order points all across Sweden, and goods can be ordered online and delivered to monopoly shops or order points, or – in special trial areas – straight to the customer's home address. The most common opening hours in 2017 was 50 hours a week, 10-19 on weekdays and 10-15 on Saturdays. The age limits for purchasing alcohol in Systembolaget is 20 both for strong and mild beverages, and 18 for on-premise sales in restaurants and bars.

Magdalena Gerger serves as CEO of Systembolaget, which has existed in its present form since 1955. Around 5,700 people work at the monopoly. Systembolaget's market share was 62.8% in 2017, and half of all sales within the monopoly was beer. The Swedish total consumption of alcohol per capita over 15 years or older was 9 litres of pure alcohol in 2017, out of which

2 litres was unrecorded consumption. Wine was the most commonly consumed beverage.

Systembolaget's price list is more affordable than the other Nordic monopolies, and excise duties are – albeit high in a European perspective – lower compared to the other monopoly countries for most beverage categories.

According to a survey, 77.8% of the Swedish population support the monopoly, and the customer satisfaction rate was at 84.2% out of a possible 100%.

## Norway

Norway has 5.3 million inhabitants and shares land borders with Sweden in the east and Finland and Russia in the north. The unemployment rate at 4% (2017) placed Norway in the middle among its Nordic neighbors, Finland having the highest rate of 8.6% and the Faroe Islands the lowest at 2.2%.

Alcohol is generally defined as a beverage containing more than 2.5 vol. %, but the Norwegian Alcohol Act also acknowledge mild alcoholic beverages from 0.7 vol. % when it comes to age limits, which are 18 for mild beverages and 20 for strong beverages, both on- and off-premise. Norway has a complete ban on alcohol advertising.

State alcohol monopoly Vinmonopolet, founded in 1922, has the sole right to sell alcoholic beverages stronger than 4.7 vol. %. Vinmonopolet has 327 stores in Norway, and it is possible to order alcohol online and collect the goods in a monopoly shop. In some areas home delivery is possible. The most common opening hours are between 10 and 18 on weekdays, and 9-15 on Saturdays. In 2017 Vinmonopolet has 1,815 employees, and Hilde Britt Mellbye serves as CEO.

Norway has the second highest rates of excise duties of all Nordic countries for spirits, intermediate products and wine, and the highest for beer. Vinmonopolet's sales accounted for 43% of the total consumption in 2017. Almost half of the alcohol sold by Vinmonopolet is red wine.

Some 6.8 litres of alcohol is consumed per capita 15 years or older in Norway, out of which 11% is unrecorded consumption. The most commonly consumed beverage is beer, closely followed by wine.

86% of Vinmonopolet's customers were satisfied with the system, and 55% of the population agreed that Vinmonopolet should have the exclusive rights for off-premise retail sales of wine and spirits.

## Iceland

Iceland is the smallest Nordic country, situated in the North Atlantic with a population of 340,000 people. The Icelandic economy has recovered from the financial crisis of 2008 with low employment rates (2.8%) in 2017.

Icelandic law defines alcohol as beverages containing more than 2.25 vol. %, and all kinds of advertising for alcohol is banned. The legal minimum age limit for on- and off-premise sales of alcohol is 20 years. Áfengis- og tóbaksverslun ríkisins (ATVR) is a state-owned company that has a monopoly on the sale of alcoholic beverages and tobacco. ATVR administrates the Vínbúð- chain, that functions as the only retailer of alcohol in Iceland. There are 51 shops scattered across the coastline, all of which are self-service stores. It is possible to order goods on Vinbudin's homepage, and have the goods delivered to the closest monopoly shop for pick up. For customers living further away than 25 km from the closest store, the packages can be delivered by mail and the post office ensures the age of the customer.

The monopoly is open on average 42 hours per week and remains closed on Sundays. 507 people work at the monopoly, headed by CEO Ivar J. Arndal. The State Liquor Store was established in 1922.

Just like the other monopolies in the Nordic countries, ATVR has fixed prices for all the products, which means the price of alcohol do not vary between shops. The taxes in Iceland are among the highest levels of all European countries, which also is reflected in Vinbudin's pricelist. Beer sales accounted for 82% of all sales in 2017. According to a survey from April 2018, roughly two-thirds of Icelanders support the Monopoly establishment. The customer satisfaction rate was 83 (out of a possible 100)

The total alcohol consumption figure for Iceland was a little short of 8 litres pure alcohol per capita aged 15 or older in 2017. The unrecorded consumption was 2.2 litres per capita aged 15 or older.

## Faroe Islands

The Faroe Islands are an autonomous part of the Kingdom of Denmark and situated in the North Atlantic Ocean north of Scotland, west of Norway and south-east of Iceland. About 50,000 people live on the islands. The Faroe Islands have control over most domestic matters, including alcohol policies, which differs significantly from the situation in Denmark.

Alcohol is defined as a beverage intended for drinking with more than 2.8 vol. %.

In 1992, the Faroese retail monopoly Rúsdrekkasøla Landsins was founded, and has the sole right to retail



alcohol with the exception for 8 brewery outlets, that also can sell their own products up to 5.8 vol. %.

Rógvi Andrias Fossádal serves as CEO of Rúsdrekkasøla Landsins. There are 8 stores, and 40 employees. The monopoly stands for 53% of the total consumption of alcoholic beverages on the Faroe Islands, and is open, on average, between 13 and 17.30 on weekdays. On Saturdays the shops are open between 10 and 14 and remains closed on Sundays. Online shopping is possible and the goods are delivered by the Faroese post service, who makes sure the age limits are enforced. Beer accounts for more than 74% of all sales in the monopoly.

The total alcohol consumption per capita aged 15 or older is 8.7 litres of pure alcohol. One fourth is unrecorded consumption, and beer is the most commonly consumed beverage.

Excise duty-wise, the Faroe Islands place themselves in the middle, where Iceland and Norway have significantly higher levels of excise duties. The Faroe Islands have, however, higher alcohol taxes than Denmark concerning all beverages, and Sweden for beer and wine.

According to a gallup survey, 62% of the population supports the current alcohol policy and monopoly arrangement, and 97% of the respondents were satisfied with the monopoly.

## Denmark

Denmark differs from its Nordic neighbors when it comes to alcohol policies in several aspects, the biggest one being that Denmark has no traditions of a retail monopoly.

This means that alcohol is more available in Denmark, both physically and economically.

Shops, kiosks and gas stations are allowed to sell alcohol around the clock, and the age limits are 16 for alcohol containing less than 16.5 vol. %, and 18 for stronger beverages. Prices and excise duties are lower.

The recorded alcohol consumption in Denmark was 9.1 litres per capita 14 years or older in 2017. Wine is the most popular alcoholic beverage (4.1 l.), followed by beer (3.3 l.) and spirits (1.7 l.) Border trade, which has been a widespread phenomenon, especially in Jutland with borders to Germany, has declined somewhat.



# Population and national economies in 2017

	GDP, billion, €	GDP, Purchasing power parity, € per capita	GDP, Average growth in 2013-2017, %
<b>Finland</b>	207	37,651	0.8
<b>Sweden</b>	446	43,898	2.8
<b>Norway</b>	321	60,413	1.6
<b>Denmark</b>	244	42,443	1.7
<b>Iceland</b>	15.1	44,582	4.4
<b>Faroe Islands</b>	1.7	34,228 <sup>1)</sup>	6.7

	Average inflation in 2013-2017, %	Labour force, million	Unemployment rate, %
<b>Finland</b>	0.9	2.69	8.6
<b>Sweden</b>	0.6	5.36	6.6
<b>Norway</b>	2.3	2.79	4.0
<b>Denmark</b>	0.7	2.99	5.8
<b>Iceland</b>	2.3	0.20	2.8
<b>Faroe Islands</b>	-0.3 <sup>2)</sup>	0.03	2.2

	Population, million	Population, 15 years and older, million	Age structure, percentage of age group, %		
			0-14	15-64	65 and over
<b>Finland</b>	5.52	4.60	16	63	21
<b>Sweden</b>	9.91	8.23	18	62	20
<b>Norway</b>	5.31	4.32	18	65	17
<b>Denmark</b>	5.73	4.78	17	64	19
<b>Iceland</b>	0.34	0.27	20	66	14
<b>Faroe Islands</b>	0.05	0.40	21	62	17

1) Faroe Islands = 2014

2) Faroe Islands = 2012-2016

Sources: Nordic Statistics, CIA World Fact Book, Eurostat



# Common rules and Nordic partnerships

The Nordic alcohol monopoly companies follow the principles of impartiality and transparency in pricing. The suppliers are informed in advance of the rules applied to the pricing of retail sale products. The retail price of an alcoholic beverage is composed of the beverage's purchase price, the alcohol monopoly sales margin and the potential deposit, excise duty on alcohol, any potential environmental or beverage package tax, and value added tax. The prevailing pricing practice in the Nordic alcohol monopolies uses a coefficient principle. The sales margin is included in the prices by the so-called pricing coefficient. The coefficient is directed to the purchase price of the beverage, though in Finland, Norway and Sweden, it excludes the beverage package tax. In Iceland and the Faroe Islands the coefficient is directed to the purchase price and includes the beverage package tax. The sales margin consists of ordinary selling costs in addition to the required management expenses and business profit.

Since 2008 the Nordic alcohol monopolies have worked in close partnership on corporate social responsibility

(CSR) with the aim of developing a sustainable supply chain for alcoholic beverages. This has resulted that the Code of Conduct has been included in all supplier agreements as from the beginning of 2012. The Code of Conduct refers to international conventions. The Code of Conduct is a set of principles and values that reflect the beliefs of Nordic alcohol monopolies and the expectations they have towards their business partners. The principles and values represent the aspirational goals and minimum expectations that Nordic alcohol monopolies have with regard to their supply chains social conduct. Obeying domestic laws is the first obligation of business enterprises. In countries where domestic laws and regulations are in conflict with or set a different standard of protection than the Code of Conduct, business enterprises should seek ways to abide by the principles that provide the highest protection to the workers and environment. The Nordic alcohol monopolies value cooperation and constructive and open dialogue to strive continuous improvement in the supply chains.



# Concepts

## **Alcoholic beverage:**

Generally, an alcoholic beverage is defined as a beverage containing ethyl alcohol intended for drinking.

National legislation in the Nordic countries defines the minimum content of a beverage to count as alcohol as follows: Sweden and Iceland 2.25 vol. %, Norway 2.5 vol. % and Faroe Islands 2.8 vol. %. In Denmark, legal age limits apply to drinks containing 1.2 vol. % or more. According to Finnish law, alcohol is defined as a beverage containing more than 1.2 vol. %

## **Off-premise retail sales of alcoholic beverages:**

Off-premise sales are all the sales that take place in Monopoly shops, grocery stores, kiosks or gas stations, which means the purchased beverage is not consumed in the place of sale.

## **On-premise retail sale of alcoholic beverages:**

On-premise sale of alcohol takes place in bars, cafés, restaurants and nightclubs, where the customer consumes the purchased product in the environments the commodity is bought.

## **Alcohol monopoly:**

A state retail alcohol monopoly functions as the only legal retailer of the kinds of alcoholic beverages described in national legislation. The scope of the monopoly may vary from country to country, but the common nominator is to eliminate private profit interests in the domestic alcohol market due to public health reasons.

## **Total consumption of alcoholic beverages:**

The sum of all alcohol consumed in a country, both recorded and un-recorded. Measured in 100% alcohol.

## **Recorded consumption of alcoholic beverages:**

The sum of all domestic on-premise sales and off-premise sales of alcohol.

## **Unrecorded alcohol consumption:**

Alcohol that is being purchased and consumed outside the frames of domestic on- and off-premise sales.

In practice, this equals alcoholic beverages imported by travelers minus alcoholic beverages exported by foreign travelers, home brewed and fermented alcoholic beverages and illegal private distilling, smuggling and the consumption of alcohol substitutes. Finland is the only Nordic country that includes alcohol consumed by Finnish tourists abroad in its statistics of unrecorded alcohol.

## **Purchasing power parity GDP:**

Gross domestic product (GDP) is the monetary value of all the finished goods and services produced within a country's borders in a specific time period.

## **Inflation rate:**

The change in consumer prices per year.

## **Unemployment rate:**

The percentage of unemployed labor force.

## **Labor force:**

The sum of employed and unemployed labor.

## **Exchange rates:**

Local currencies (NOK, SEK, ISK, DKK), as well as USD have been converted into € according to the average exchange rates in the year 2017.

1 euro equals	9.637	SEK
	9.329	NOK
	133.590	ISK
	7.439	DKK

Data originally reported in USD has been converted to € with the rate of 1 USD= 0.856 €.

# Regulation on alcohol advertising

**Finland:** Advertising for strong alcoholic beverages is prohibited.

As for milder beverages containing between 1.2 and 22 vol. % there are statutory restrictions concerning both content and conformation of the commercial.

The law was updated in 2015 to include a ban on advertisements in social media, and stricter regulations on commercials in public places.

**Sweden:** The Swedish Alcohol Act prohibits commercials for alcoholic beverages containing 15 vol. % or more. Alcohol commercials must apply special moderation and cannot target young people under the age of 25.

Printed ads must carry warning texts.

A white paper on alcohol marketing in digital media was presented to the Swedish government in January 2018, which might be the first step towards stricter regulation for online marketing in the future.

**Norway:** All alcohol advertising for beverages containing 2.5 vol. % or more is prohibited by law.

**Denmark:** Alcohol marketing is regulated through both statutory restrictions and voluntary agreements. Commercials cannot target an audience younger than 18 years.

**Iceland:** Alcohol advertising is prohibited for beverages stronger than 2.25 vol. %.

**Faroe Islands:** In Faroe Islands alcohol advertising for beverages stronger than 2.8 vol. % is prohibited.



# Minimum legal age for purchasing alcoholic beverages

Situation as at 1st of January 2018

## Off-premise retail sale

	Mild alcoholic beverages	Strong alcoholic beverages
<b>Finland</b>	18	20
<b>Sweden</b>	20	20
<b>Norway</b>	18	20
<b>Denmark</b>	16	18
<b>Iceland</b>	20	20
<b>Faroe Islands</b>	18	18

## On-premise retail sale

	Mild alcoholic beverages	Strong alcoholic beverages
<b>Finland</b>	18	18
<b>Sweden</b>	18	18
<b>Norway</b>	18	20
<b>Denmark</b>	18	18
<b>Iceland</b>	20	20
<b>Faroe Islands</b>	18	18

**Finland:** Mild alcoholic beverages contain between 1.2 and 22 vol. % alcohol.

**Sweden:** The age limit for "Folköl" (beer containing between 2.8 and 3.5 vol. %) is 18 years

**Norway:** Mild alcoholic beverages contain between 0.7 and 22 vol. %

**Denmark:** Mild alcoholic beverages contain between 1.2 and 16.5 vol. %

*Sources: National legislation*

# Scope of the Nordic alcohol monopoly companies

Situation as at 1st January 2018

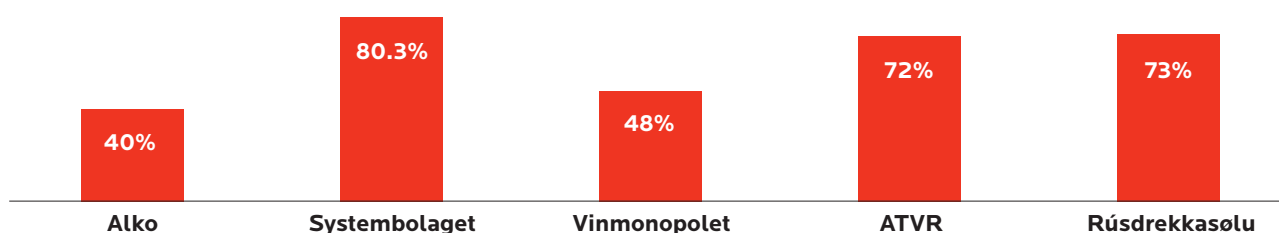
## The extent of the monopoly rights

<b>Alko (Finland)</b>	All alcoholic beverages with 3 exceptions: Beverages with max 5.5 vol. %, which can be sold in grocery stores, independent brewery products and most Finnish farm winery products containing 13 vol. % or less. <sup>1)</sup>
<b>Systembolaget (Sweden)</b>	All alcoholic beverages stronger than 2.25 vol. %, with one exception: Beers with max 3.5 vol. % ("Folköl") which can be sold in grocery stores.
<b>Vinmonopolet (Norway)</b>	All alcoholic beverages stronger than 4.7 vol. %
<b>ATVR (Iceland)</b>	All alcoholic beverages stronger than 2.25 vol. %
<b>Rúsdrekkasölu (Faroe Islands)</b>	All alcoholic beverages stronger than 2.8 vol. %, with one exception: Beers and ciders can be sold in beer producer's shops. Products stronger than 60 vol. % cannot be sold in the Faroe Islands.

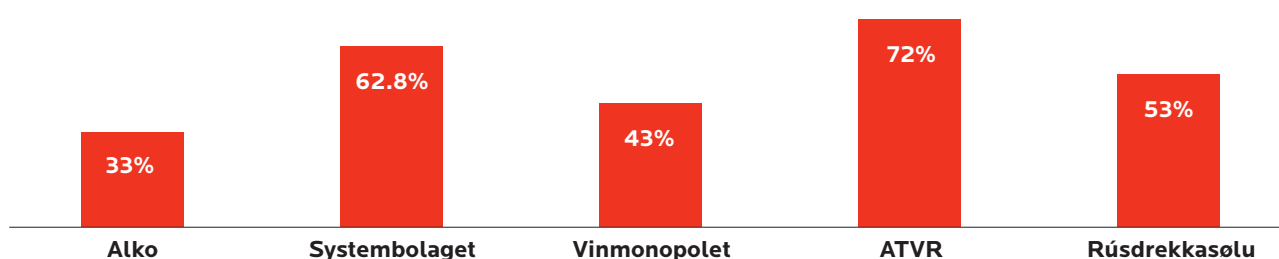
1) The new Alcohol Act entered into force on 1st of March 2018 as a whole, but some of the amendments entered into force already on the 1st of January 2018. Among the most important ones are that retail stores can sell all kinds of alcoholic beverages that contain up to 5.5% alcohol by volume and that independent breweries and microbreweries can apply for a licence to sell craft beer from the regional state administrative agency. This is a fundamental change from grocery stores being allowed to sell only fermented beverages with max 4.7 vol. % up until 1.1.2018.

## Market shares in 2017

**Monopoly's share of recorded alcohol consumption calculated in litres of 100% alcohol**



**Monopoly's share of total alcohol consumption, calculated in litres of 100% alcohol**



Source: Nordic alcohol monopoly companies



# Sales network of the Nordic alcohol monopoly companies

Situation as at 1st of January 2018

## Off premise retail stores of the Nordic alcohol monopoly companies

	Number of stores	Stores 100,000 inhabitants	Proportion of self-service stores %	Number of pick-up points
<b>Finland</b>	355	6.4	100	60
<b>Sweden</b>	440	4.4	99.5	457
<b>Norway</b>	327	6.1	100	0
<b>Iceland</b>	51	15	100	0
<b>Faroe Islands</b>	8	16	100	2

## Sales by mail and internet

	Sales by mail	Sales by internet	Notes
<b>Finland</b>	No	Yes	Yes. The orders of b2c-customers are delivered to Alko's stores or pick-up points.
<b>Sweden</b>	Yes	Yes	Home delivery in special areas, in shops or agents "ombud".
<b>Norway</b>	Yes	Yes	Yes, the goods are mainly delivered by mail or to Vinmonopolet stores. There are also home delivery in selected areas.
<b>Iceland</b>	Yes	Yes	The goods are delivered to ATVR's stores. Home delivery to customers which have a distance of more than 25 km from next ATVR store. The Post Office checks for age control in those instances.
<b>Faroe Islands</b>	Yes	Yes	By post services where age verification is made.

Source: Nordic alcohol monopoly companies

# Opening hours of the alcohol monopoly company stores

## The most common opening hours 1st January 2018

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total per week
<b>Finland <sup>1)</sup></b>	9 - 20	9 - 20	9 - 20	9 - 20	9 - 20	9 - 18	closed	<b>64</b>
<b>Sweden</b>	10 - 19	10 - 19	10 - 19	10 - 19	10 - 19	10 - 15	closed	<b>50</b>
<b>Norway</b>	10 - 18	10 - 18	10 - 18	10 - 18	10 - 18	9 - 15	closed	<b>46</b>
<b>Iceland</b>	11 - 18	11 - 18	11 - 18	11 - 18	11 - 18	11 - 18	closed	<b>42</b>
<b>Faroe Islands</b>	13 - 17.30	13 - 17.30	13 - 17.30	13 - 17.30	10 - 17.30	10 - 14	closed	<b>29.5</b>

## The longest opening hours 1st January 2018

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total per week
<b>Finland</b>	9 - 20	9 - 20	9 - 20	9 - 20	9 - 20	9 - 18	closed	<b>64</b>
<b>Sweden</b>	10 - 20	10 - 20	10 - 20	10 - 20	10 - 20	10 - 15	closed	<b>55</b>
<b>Norway</b>	10 - 18	10 - 18	10 - 18	10 - 18	9 - 18	9 - 15	closed	<b>47</b>
<b>Iceland</b>	10 - 20	10 - 20	10 - 20	10 - 20	10 - 20	11 - 18	closed	<b>57</b>
<b>Faroe Islands</b>	10 - 17.30	10 - 17.30	10 - 17.30	10 - 17.30	10 - 19.00	10 - 14	closed	<b>43</b>

1) In March 2018, the opening hours were prolonged to 9-21

Source: Nordic alcohol monopoly companies

## Other off-premise retail sale outlets for alcoholic beverages

	Year	Other retail outlets	Producer shops <sup>1)</sup>	Other retail per 100,000 inhabitants
<b>Finland</b>	2017	4,948 <sup>2)</sup>	32	90
<b>Sweden</b>	2014	6,587 <sup>3)</sup>	0	66
<b>Norway</b>	2015	4,257	0	80
<b>Iceland</b>	2018	0	0	0
<b>Faroe Islands</b>	2018	0	8	0

	Year	Kiosks may apply for a license to sell alcohol	Gas stations may apply for a license to sell alcohol	Possibility to legally buy on the internet from abroad
<b>Finland</b>	2018	yes	yes	yes <sup>4)</sup>
<b>Sweden</b>	2018	yes <sup>3)</sup>	yes <sup>3)</sup>	yes
<b>Norway</b>	2018	no	no	yes <sup>5)</sup>
<b>Iceland</b>	2018	no	no	yes
<b>Faroe Islands</b>	2018	no	no	no

1) In Finland farm winery shops and in Faroe Islands brewery outlets

2) Only fermented beverages with an alcohol content at most 4.7 vol. %  
(the new law that entered into force 1.1 2018 is not yet detectable in this data)

3) Only folköl, with max 3.5 vol. %

4) The legislative process of internet based sales is open

5) Not other suppliers in Norway, but yes, from other countries. Norwegian custom declaration is needed.

Source: Nordic alcohol monopoly companies

## On-premise retail sale networks for alcoholic beverages

	Year	All drinks	Wine and beer only	Beer only	Total	Total per 100,000 inhabitants
<b>Finland</b>	2017	6,356	443	1,770 <sup>1)</sup>	8,569	155
<b>Sweden</b>	2016	-	-	-	15,299	154
<b>Norway</b>	2015	6,659	871	59	7,589	144
<b>Iceland</b>	2017	1,247	-	-	1,247	345
<b>Faroe Islands</b>	2018	93	1	-	120	243

1) Beer only restaurants are allowed to sell fermented alcoholic beverages containing max 4.7 vol. %

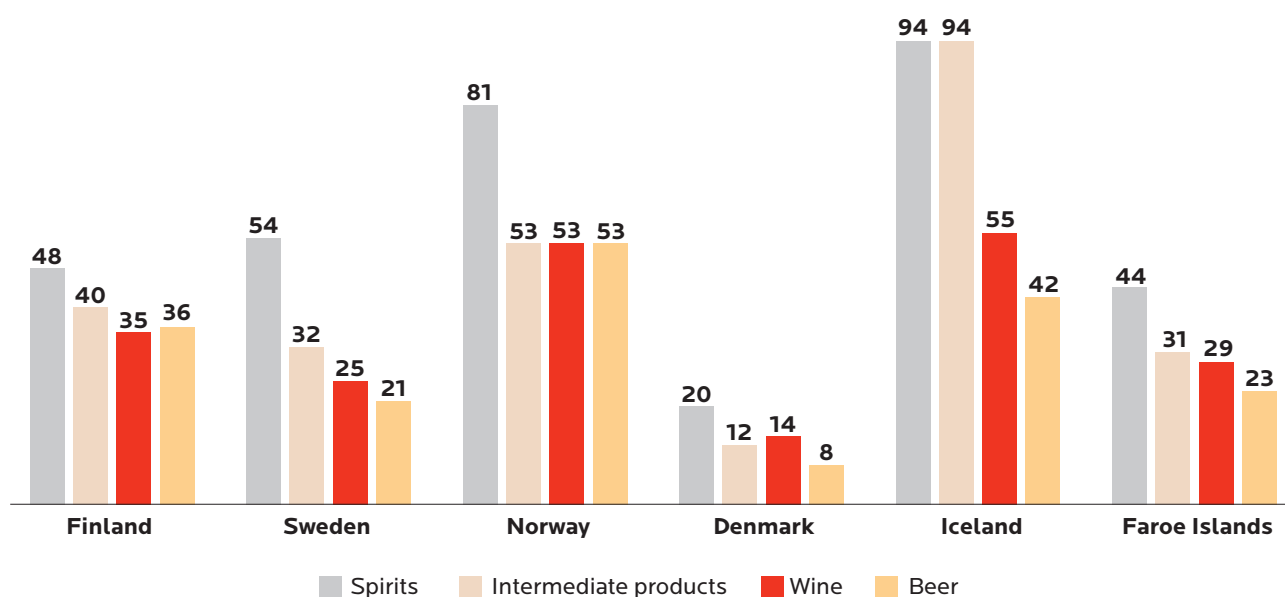
Source: Nordic alcohol monopoly companies



# Alcohol excise duty rates and value-added tax rates in the Nordic countries

Situation as at 1st of January 2018

## Euro per litre of 100% alcohol



	Spirits	Intermediate products	Wine <sup>1)</sup>	Beer	VAT, %	Surtax
Finland	47.9	39.9	34.8	35.55 <sup>2)</sup>	24.0	Yes
Sweden	53.8	31.7	24.8	21.0	25.0	No
Norway	80.8	52.7	52.7	52.7	25.0	Yes
Denmark	20.2	11.6	14.2	7.53 <sup>2)</sup>	25.0	Yes
Iceland	94.1	94.1	55.3	42.0	11.0	Yes
Faroe Islands	44.3	30.6	29.3	23.2 <sup>3)</sup>	25.0	Yes

1) Excise duty is calculated on the basis of a beverage containing 18% ethyl alcohol by volume for intermediate products and on the basis of a beverage containing 11% ethyl alcohol by volume for wines

2) Finland and Denmark have tax relieves for small breweries

3) Beer is classed in three tax classes in Faroe Islands. Class I is beer containing more than 2.25% but less than 4.6%. Class II is beer containing between 4.6% and 5.8%. And Class III is beer containing more than 5.8% ethyl alcohol by volume.

Source: Nordic alcohol monopoly companies, Spirits Europe



# Alcohol excise duties in Europe

Situation as at 1st of January 2017

## Euro per litre of 100% alcohol

	Spirits	Intermediate products	Wine	Beer
<b>EU:s minimum tax</b>	6	3	0	2
<b>Bulgaria</b>	6	3	0	2
<b>Croatia</b>	7	6	0	5
<b>Romania</b>	7	5	0	2
<b>Cyprus</b>	10	3	0	6
<b>Italy</b>	10	5	0	8
<b>Luxembourg</b>	10	4	0	2
<b>Spain</b>	10	4	0	2
<b>Czech Republic</b>	11	5	0	3
<b>Hungary</b>	11	5	0	5
<b>Slovakia</b>	11	5	0	4
<b>Austria</b>	12	4	0	5
<b>Germany</b>	13	9	0	2
<b>Poland</b>	13	4	3	5
<b>Slovenia</b>	13	7	0	12
<b>Malta</b>	14	8	2	5
<b>Portugal</b>	14	4	0	4
<b>Latvia</b>	15	7	7	5
<b>France</b>	17	10	0	7
<b>Lithuania</b>	17	15	15	7
<b>Netherlands, the</b>	17	8	8	8
<b>Denmark</b>	20	12	14	8
<b>Estonia</b>	24	15	11	16
<b>Switzerland*</b>	25	13	0	4
<b>Greece</b>	26	6	2	13
<b>Belgium</b>	30	9	7	5
<b>UK</b>	32	24	30	22
<b>Ireland</b>	43	34	39	23
<b>Turkey*</b>	47	71	14	32
<b>Finland</b>	48	40	35	36
<b>Sweden</b>	54	32	25	21
<b>Norway*</b>	81	53	53	52
<b>Iceland*</b>	94	94	55	42

\* Non-EU country

Source: Spirits Europe

# Pricing principles of the Nordic alcohol monopoly companies

Situation as at 1st of January 2018

## Price concepts and pricing coefficient

	The basic price	Pricing coefficient <sup>2)</sup>	Exceptions of pricing coefficient
<b>Alko</b>	The back door price (BDP) without taxes <sup>1)</sup>	Spirits: 1.56 Other strong beverages: 1.50 Mild and fortified wine: 1.54 Long drinks: 1.81 Beers: 1.67	Lower pricing coefficient for more expensive beverages
<b>Systembolaget</b>	Purchase price without taxes	1.19	-
<b>Vinmonopolet</b>	Purchase price without taxes	1.22 + a fixed margin of 8.90 NOK per litre	Coefficient decreases when margin goes over 80 NOK. Maximum margin is 110 NOK. Minimum margin is 4 NOK.
<b>ATVR</b>	Purchase price with taxes	Alcohol content: under 22% by volume: 1.18 over 22% by volume: 1.12"	-
<b>Rúsdrekkasölu</b>	Purchase price with taxes	Distilled spirits: 1.49 (+20.00 DKK per litre). Wine: 1.23 (+15.00 DKK per litre) Fortified wine: 1.23 (+15.00 DKK per litre). Beers: 1.25	-

- 1) The price at the back door of the retail outlet (BDP) : The purchasing price (excl. alcoholic beverage taxes) added to central warehouse and shop delivery costs
- 2) The pricing coefficient is the coefficient that, adjusted to the original price, contributes to a part of the margin.

Source: Nordic alcohol monopoly companies

# Pricing principles of the Nordic alcohol monopoly companies

Situation as at 1st of January 2018

## Minimum margin and rounding

	Margins	Rounding in local currency
<b>Alko</b>	<b>Minimum margin:</b> General: 1.25 €/litre (minim. 0.64 €/sales unit)  Beers and long drinks: 0.78 €/litre (min. 0.29 €/sales unit)	If the price is under 20 €: to the nearest 1 cent.  If the price is over 20 €: to the nearest 10 cent.
<b>Systembolaget</b>	<b>Fixed margin:</b> Distilled spirits: 5.02 SEK/bottle Wines: 5.21 SEK/bottle (for bag-in-box, whole bottles, tetra packs and PET). For smaller bottles: 2.61 Beers: 0.75 SEK/bottle Other beverages (cider): 1.11 SEK/bottle Alcohol free beer, cider and mixed beverages 2.17 SEK/bottle Alcohol free wine, and other (larger) products 5.21 SEK/bottle Alcohol free products have a fixed margin per bottle similar to what alcoholic products in the same group have.	Wines and spirits: to the nearest 1 SEK.  Beer, cider and alcohol-free products: to the nearest 0.1 SEK.
<b>Vinmonopolet</b>	<b>Fixed margin:</b> General: 8.90 NOK/litre	to the nearest 0.1 NOK
<b>ATVR</b>	No fixed margin, no minimum margin	to the nearest 1 ISK
<b>Rúsdrekkasölu</b>	No fixed margin, no minimum margin	to the nearest 0.05 DKK

Source: Nordic alcohol monopoly companies

# Price examples in the Nordic alcohol monopoly companies

## Pricelists as at 1st of June 2018, price in Euro

Product (0.7 / 0.75 )	Alko	System-bolaget	Vin-monopolet	ATVR	Rúsdrek- kasölu
<b>Spirits</b>					
Koskenkorva Vodka	<b>21.69</b>	<b>21.69</b>	33.22	39.14	-
Absolut Vodka	<b>22.65</b>	24.80	34.94	42.66	36.03
Smirnoff Vodka	<b>22.69</b>	23.76	32.15	40.79	33.14
Gordon's London Dry Gin	26.99	<b>24.80</b>	35.36	42.66	35.76
<b>Other strong beverages</b>					
Hennessy Very Special	41.50	<b>39.95</b>	49.30	59.13	58.48
Renault Carte Noire Extra	61.99	<b>60.08</b>	62.16	-	72.26
Ballantine's Finest	28.98	<b>26.88</b>	40.08	47.15	38.99
Jim Beam	29.69	<b>25.84</b>	38.15	52.39	39.46
<b>Red wine</b>					
Baron de Ley Reserva	17.48	<b>12.35</b>	18.21	20.20	-
Mouton Cadet Rouge	<b>13.99</b>	16.50	17.53	14.96	-
Gato Negro Cabernet Sauvignon <sup>1)</sup>	7.78	<b>6.12</b>	10.71	10.47	9.61
Gato Negro Cabernet Sauvignon BIB	29.99	<b>20.44</b>	37.51	38.92	-
<b>White wine</b>					
J. P. Chenet Colombard-Chardonnay <sup>2)</sup>	9.75	<b>7.16</b>	12.85	13.10	9.95
Penfolds Koonunga Hill Chardonnay	12.99	<b>9.24</b>	15.00	16.46	-
Blue Nun	8.98	<b>6.74</b>	10.17	10.59	10.49
Viña Maipo Chardonnay, BIB <sup>3)</sup>	28.99	<b>19.61</b>	35.69	42.66	-
<b>Sparkling wine</b>					
Freixenet Cordon Negro Cava Brut <sup>4)</sup>	10.40	<b>9.24</b>	12.85	14.60	-
Veuve Clicquot Brut	49.91	<b>43.06</b>	45.55	44.91	56.19
Dom Perignon brut	169.89	<b>143.20</b>	144.71	149.70	161.05
<b>Beer</b>					
Medium beer, bottle 0.33 l	1.59	<b>1.19</b>	-	2.24	1.39
Strong beer, domestic product, bottle 0.33 l	2.29	<b>1.03</b>	3.74	2.66	1.65
Strong beer, domestic product, can 0.5 l	3.02	<b>1.13</b>	5.26	2.66	2.50
Imported beer, Leffe, bottle 0.33 l	3.98	<b>2.06</b>	5.13	3.79	2.76
<b>RTD</b>					
Bacardi Breezer Orange 0.275 l	3.48	<b>2.06</b>	-	3.11	2.72

- 1) Or Gato Negro Pinot Noir
- 2) Or J.P. Chenet Chardonnay or Medium Sweet
- 3) Or Vina Maipo Sauvignon Blanc BIB
- 4) Or Freixenet Gordon Negro Seco

Source: Nordic alcohol monopoly companies

# Travelers' alcohol import quotas in litres

Situation as at 1st of January 2018

Litres / Traveler	Spirits		Intermediate products and sparkling wines		Wines		Beer	
<b>EU-MEMBERS</b>								
<b>Finland</b>								
From EU countries	No quantitative quotas <sup>1)</sup>							
From non-EU countries	1	or	2	and	4	and	16	
Time limit from non-EU countries	Importing of alcoholic beverages is allowed with time limit of 24 hours when arriving from non-EU or EEA countries, excluding air traffic.							
<b>Sweden</b>								
From EU countries	No quantitative quotas <sup>1)</sup>							
From non-EU countries	1	or	2	and	4	and	16	
Time limit from non-EU countries	For travellers living in Sweden, duty- and tax-free importation only applies if the traveller's trip abroad was longer than 20 hours							
<b>Denmark</b>								
From EU countries	No quantitative quotas							
From non-EU countries	1	or	2	and	4	and	16	
Time limit from non-EU countries	No time limits							
<b>NON-EU COUNTRIES</b>								
<b>Faroe Islands</b>								
	1	and	1	and	0	and	2	
			or					
	1	and	0	and	2	and	2	
			or					
	0	and	0	and	4	and	2	
			or					
	0	and	0	and	0	and	10	
Time limits	No time limits							
<b>Iceland <sup>2)</sup></b>								
	Spirits		Wines				Beer	
	1	and	0.75			and	3	
			or					
	0	and	3			and	6	
			or					
	1	and	0			and	6	
			or					
	0	and	1.5			and	6	
			or					
	0	and	0			and	18	
Time limits	No time limits							
<b>Norway</b>								
	Spirits		Wines				Beer	
	1 (1)	and	3 (1.5)			and	2 (2)	
			or					
	0	and	4.5 (3)			and	2 (2)	
			or					
	0	and	0			and	6.5 (5)	
Time limits	In brackets the amount of alcohol if tobacco is included. Time limit of 24 hours for tax free import							

1) There are, however guideline limits on how much alcohol a person can bring back for his/her private use.

2) These are examples of combinations. The full list is available on <https://www.tollur.is/english/individuals/customs/traveling-to-iceland/duty-free-imports/alcoholic-beverages-duty-free/>

Source: Nordic customs authorities



# Travelers' alcohol imports

## Alcoholic beverages imported by travelers, million litres

	Spirits	Wine <sup>1)</sup>	Beer	Cider and long drinks	Total in 100% alcohol
<b>Finland</b>					
2011	8.0	13.9	24.5	21.2	7.8
2012	8.2	13.1	28.5	15.2	7.7
2013	9.5	14.6	31.6	19.6	8.9
2104	8.0	14.9	34.8	20.3	8.4
2105	8.5	12.5	31.1	19.9	8.1
2016	7.9	12.2	36.0	23.6	8.4
2017	6.2	11.8	31.7	17.5	6.9
<b>Sweden <sup>2)</sup></b>					
2011	16.4	18.9	43.0	4.2	11.2
2012	14.5	17.6	40.9	1.9	10.1
2013	18.4	18.7	46.8	2.4	12.0
2014	16.4	16.0	39.0	1.8	10.5
2015	15.8	13.9	35.3	4.6	9.9
2016	14.1	14.1	36.5	2.3	9.3
2017	13.9	16.9	47.3	2.7	10.1
<b>Denmark <sup>3)</sup></b>					
2010	2.0	14.0	70.0	0.0	5.0
<b>Norway</b>					
2016					3.3

1) Wines include fortified wines

2) The Swedish data has been revised for the years 2011 - 2016 by CAN

3) Statistics Denmark is no longer producing statistics on border trade. Different calculations is today made by Ministry of Taxation.

## Alcoholic beverages imported by travelers, total in 100% alcohol

	Year	Million litres	Litres per capita	Litres per capita 15 years and older
<b>Finland</b>	2017	6.9	1.25	1.5
<b>Sweden</b>	2017	10.1	1.0	1.2
<b>Denmark</b>	2010	5.0	0.9	1.1
<b>Norway</b>	2016	3.3	0.6	0.8

Sources: THL, CAN, Skatteministeriet, FHI

# Total alcohol consumption

## Per capita aged 15 and over, 100% alcohol

	Year	Recorded consumption, litres per capita aged 15 and over	Unrecorded consumption, litres per capita aged 15 and over	Total consumption, litres per capita aged 15 and over	Proportion of unrecorded consumption of total consumption, %
Finland	2017	8.4	1.9	10.3	18.5
Sweden	2017	7.1	2.0	9.0	22.0
Norway	2016	6.0	0.8	6.8	11.0
Denmark <sup>1)</sup>	2017	9.1	-	-	-
Iceland	2017	5.7	2.2	8.0	28.0
Faroe Islands	2017	6.5	2.2	8.7	25.0

1) In Denmark: per capita older than 14

### Recorded consumption of alcoholic beverages:

The sum of all domestic on-premise sales and off-premise sales of alcohol.

### Unrecorded alcohol consumption:

Alcohol that is being purchased and consumed outside the frames of domestic on- and off-premise sales.

In practice, this equals alcoholic beverages imported by travelers minus alcoholic beverages exported by foreign travelers, home brewed and fermented alcoholic beverages and illegal private distilling, smuggling and the consumption of alcohol substitutes. Finland is the only Nordic country that includes alcohol consumed by Finnish tourists abroad in its statistics of unrecorded alcohol.

### Total consumption of alcoholic beverages:

The sum of all alcohol consumed in a country, both recorded and un-recorded.

Source: Nordic alcohol monopoly companies, THL, CAN, FHI, Statistics Denmark, Statistics Faroe Islands

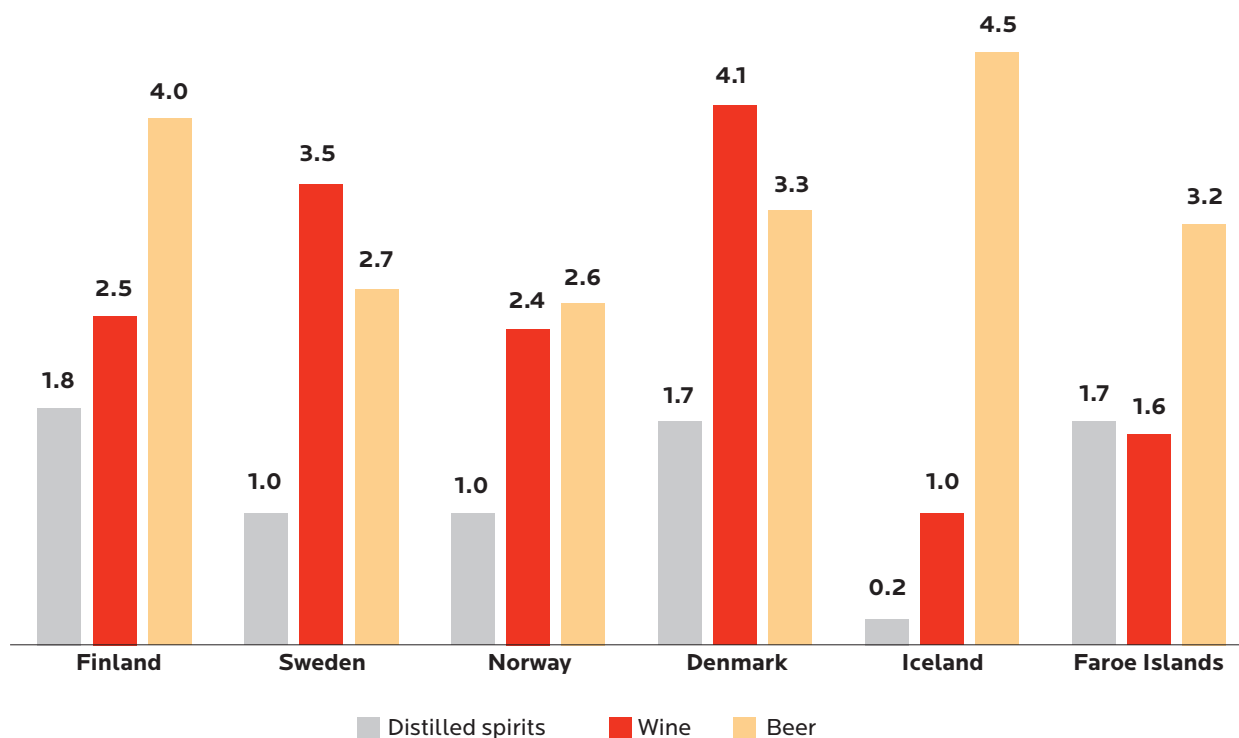
# Recorded alcohol consumption in the Nordic countries

## Litres of 100% alcohol per capita aged 15 and over

	Year	Distilled spirits	Wines	Beer
<b>Finland</b>	2017	1.8	2.5	4.0
<b>Sweden</b>	2017	1.0	3.5	2.7
<b>Norway</b>	2017	1.0	2.4	2.6
<b>Denmark</b>	2017	1.7	4.1	3.3
<b>Iceland</b>	2017	0.2	1.0	4.5
<b>Faroe Islands</b>	2017	1.7	1.6	3.2

- 1) Wine includes cider and longdrinks
- 2) In Denmark: per capita older than 14

## Litres per capita aged 15 and over



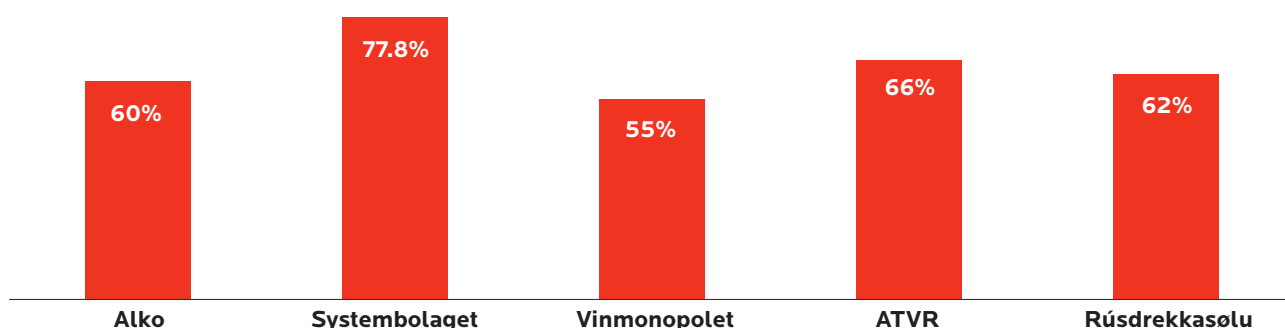
Source: Nordic alcohol monopoly companies, THL, CAN, FHI, Statistics Denmark

# Public opinion on alcohol policy

<b>Finland</b>	A survey conducted by Kantar TNS in January 2018 with 1,000 interviews showed that 49% of the respondents supported prevailing alcohol policies, and 13% wanted stricter policies. 32% of the respondents were in favour for more liberal policies. Half of the respondents thought that wine should be available in ordinary grocery stores, whereas almost as many - 47%- considered wines to belong on the shelves of Alko. 60% of the respondents agreed that Alko and its sole right to off-premise retail sale of alcohol is a good way of controlling the harmful effects of alcohol
<b>Sweden</b>	77.8% supports the monopoly according to a Kantar SIFO survey
<b>Norway</b>	According to a survey conducted in May 2017: 55 per cent of respondents agreed that Vinmonopolet should have the exclusive rights for off-premise retail sale of wine and spirits.
<b>Iceland</b>	In April 2018 66% of the respondents supported the monopoly arrangement
<b>Faroe Islands</b>	According to a survey conducted in September 2017 by Gallup 62 per cent of respondents supported the alcohol policy including the monopoly arrangement.

## Monopoly support in 2017

Surveys are not comparable between monopolies



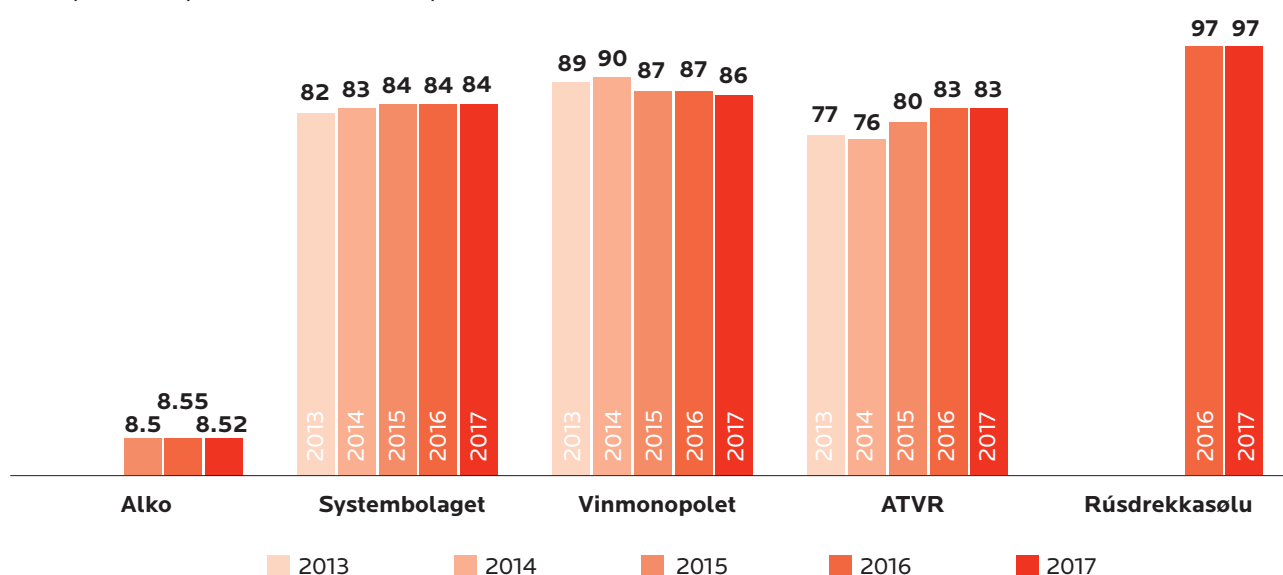
Source: Nordic alcohol monopoly companies

# Customer satisfaction rates in the Nordic alcohol monopoly companies

<b>Alko</b>	8.5 on a scale from 4 to 10
<b>Systembolaget</b>	84.20%
<b>Vinmonopolet</b>	In 2017 surveys showed that 86% of our customers were satisfied or very satisfied with Vinmonopolet. Service, information available in the shops, and quality are Vinmonopolet's most valued traits amongst the public.
<b>ATVR</b>	In may 2017, customer's satisfaction were 83%
<b>Rúsdrekkasölu</b>	According to a survey conducted in September 2017 by Gallup 97 per cent of respondents were either very satisfied or satisfied with the Faroese alcohol monopoly Rúsdrekkasöla Landsins.

## Development in customer satisfaction rates 2013 - 2017

Surveys not comparable between monopolies. Alko uses a 4-10 scale.



Source: Nordic alcohol monopoly companies

# Personnel and beverage brands

Situation as at 1st of January 2018

## Personnel

<b>Alko</b>	2,401 <sup>1)</sup>
<b>Systembolaget</b>	5,714
<b>Vinmonopolet</b>	1,815
<b>ATVR</b>	507
<b>Rúsdrekkasölu</b>	40

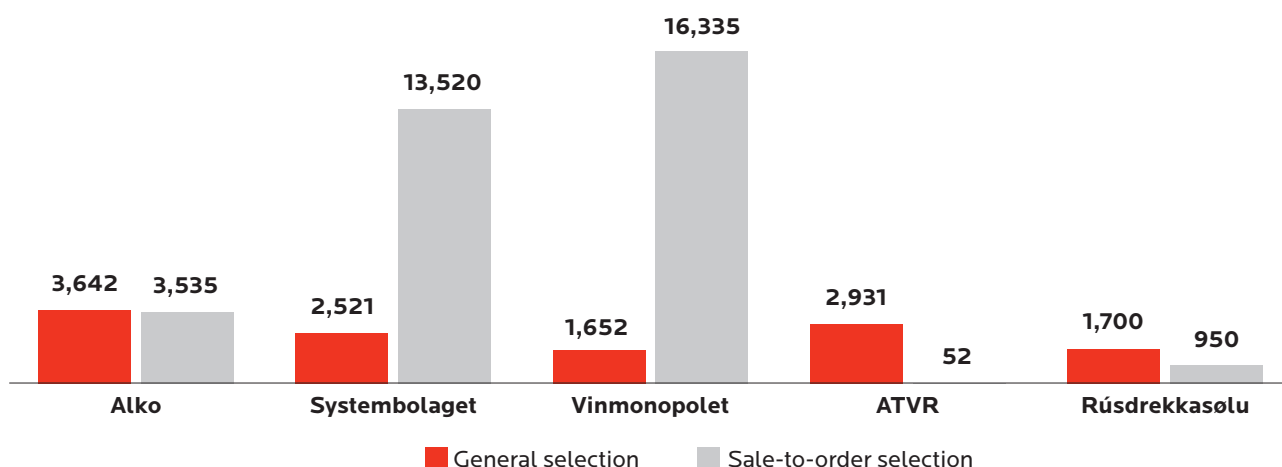
1) = Average number of employees in 2017

## Beverage brands

	General selection	Sale-to-order selection
<b>Alko</b>	3,642	3,535
<b>Systembolaget</b>	2,521	13,520
<b>Vinmonopolet</b>	1,652	16,335 <sup>1)</sup>
<b>ATVR</b>	2,931	52
<b>Rúsdrekkasölu</b>	1,700	950

1) The total selection of Vinmonopolet consists of 22,708 brands. Apart from the general selection, and the sale-to-order selection the monopoly run an additional selection (1,336 brands) and a special selection (3,385 brands). These are available online, but the delivery times may vary.

## Number of beverage brands



Source: Nordic alcohol monopoly companies

# Packaging 2017

## Wine

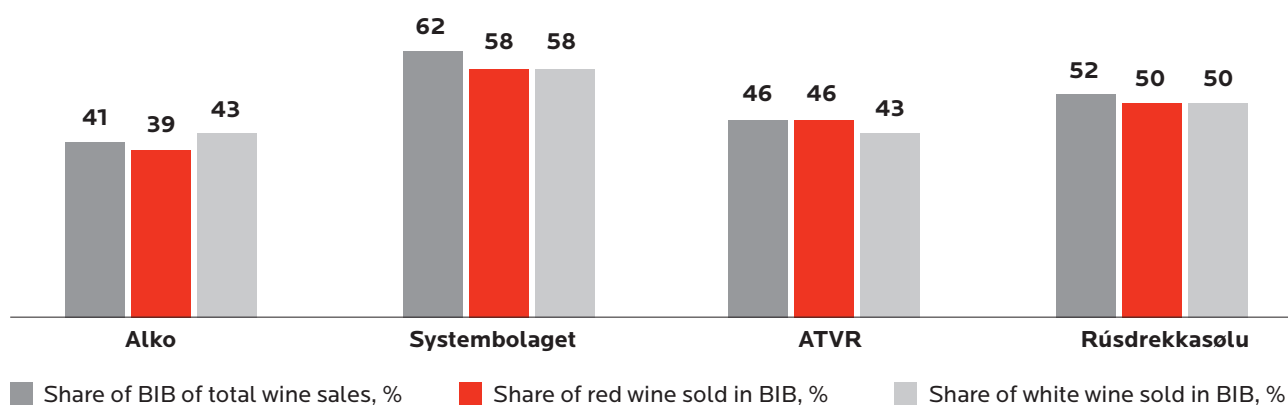
	Share of BIB of total wine sales, %	Share of red wine sold in BIB, %	Share of white wine sold in BIB, %	Share of wine sold in PET-bottles, %	Share of wine sold in tetra packs, %
Alko	41	39	43	4.6	7.0
Systembolaget	62	58	58	1.7	na
Vinmonopolet	na	na	na	na	na
ATVR	46	46	43	na	2.8
Rúsdrekkasölu	52	50	50	0.0	1.7

## Beer

	Beer sold in cans, %	Beer sold in multipacks, %
Alko	60	35
Systembolaget	75	0
Vinmonopolet	na	na
ATVR	87	na <sup>1)</sup>
Rúsdrekkasölu	73	77

1) All beers are available in one bottle or one can, i.e. multipacks are allowed to be opened.

## Share of bag-in-box wines in different product groups, %



Source: Nordic alcohol monopoly companies

# Total sales in 2017

## Litres

	Million litres	Million litres excl. beer	Million litres of 100% alcohol
Alko	93.2	85	15.6
Systembolaget	482.9	240.9	47.2
Vinmonopolet	80.6	77.9	12.4
ATVR	21.9	4.7	1.6
Rúsdrekkasölu	3.2	0.8	0.3

## Change from previous year, %

	Million litres	Million litres excl. beer	Million litres of 100% alcohol
Alko	-0.3	0	-0.4
Systembolaget	0.8	0.7	0.4
Vinmonopolet	-0.8	-0.8	-0.9
ATVR	4.8	4.4	4.4
Rúsdrekkasölu	5.4	8.1	4.4

## Litres per capita

	Litres	Litres excl. beer	Litres of 100% alcohol
Alko	16.9	15.4	2.8
Systembolaget	47.7	23.8	4.6
Vinmonopolet	15.2	14.7	2.3
ATVR	65.2	14.0	4.7
Rúsdrekkasölu	64.1	16.6	5.2

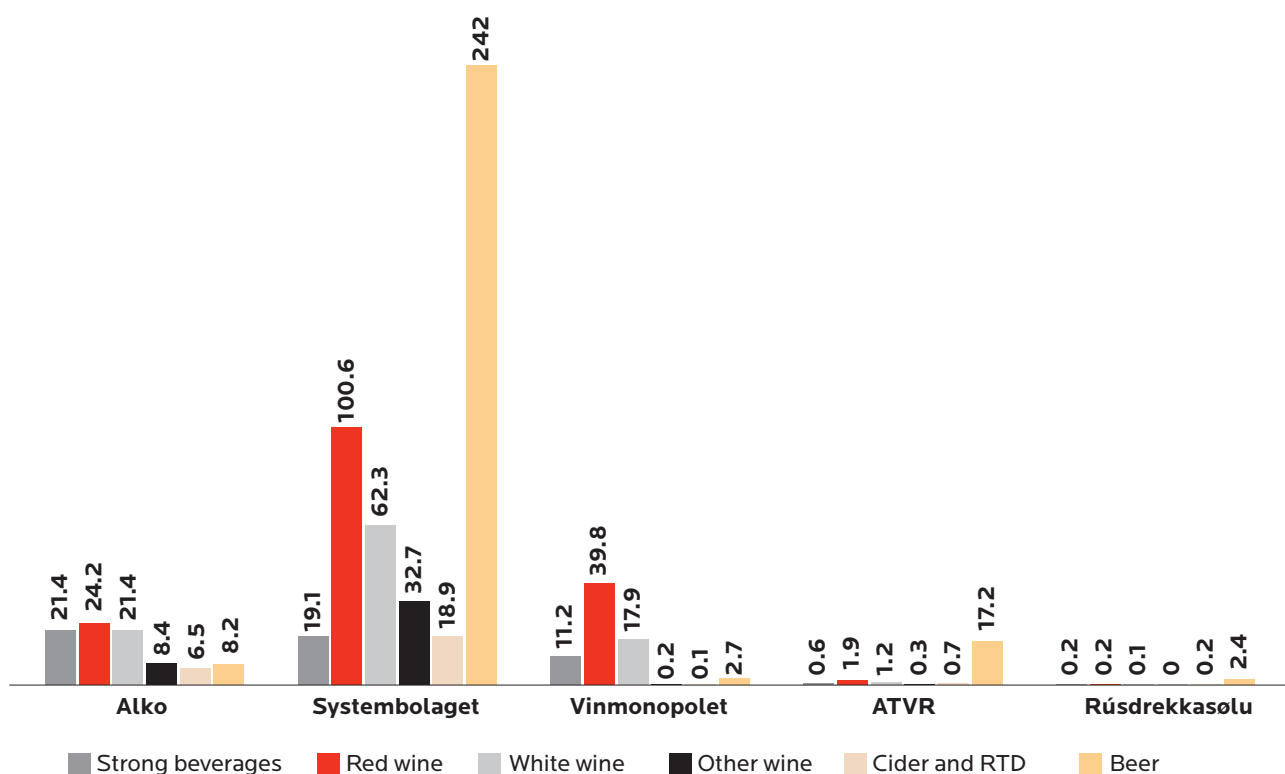
Source: Nordic alcohol monopoly companies



# Sales by product groups in 2017

Million litres

	Alko	Systembolaget	Vinmonopolet	ATVR	Rúsdrekkasölu
Spirits	13.8	5.6	11.2	0.6	0.2
Other strong alcoholic beverages	7.6	13.5	0.0	0.1	0.0
Fortified wines	2.8	3.8	0.5	0.0	0.0
Red wines	24.2	100.6	39.8	1.9	0.2
White wines	21.4	62.3	17.9	1.2	0.1
Sparkling wines	5.6	16.7	5.5	0.2	0.0
Rosé wines	1.1	14.5	2.2	0.1	0.0
Other wines	1.7	1.5	0.2	0.0	0.0
Ciders	0.7	11.8	0.1	0.3	0.2
RTD (Long drinks)	5.8	7.1	0.0	0.4	0.0
Beers	8.2	242.0	2.7	17.2	2.4
Non-alcoholic products	0.4	3.4	0.5	0.0	0.0
<b>Total</b>	<b>93.2</b>	<b>482.9</b>	<b>80.6</b>	<b>21.9</b>	<b>3.2</b>

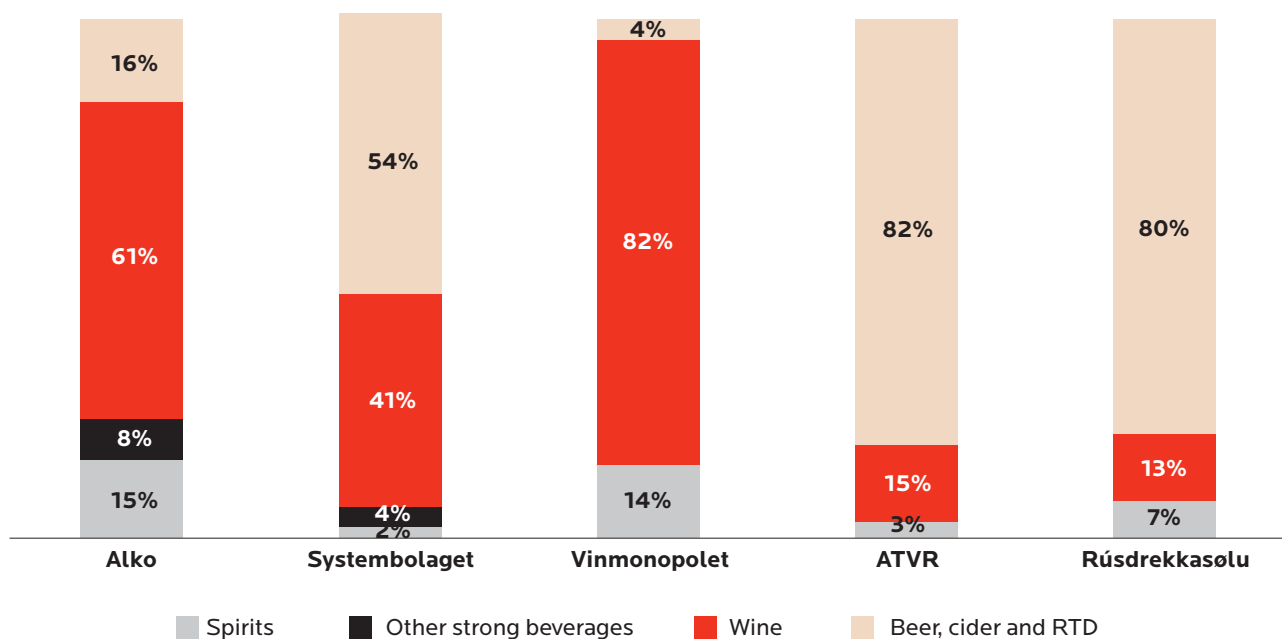


Source: Nordic alcohol monopoly companies

# Structure of sales by product groups in 2017

## Share of litres in percentages

	Alko	Systembolaget	Vinmonopolet	ATVR	Rúsdrekkasölu
Spirits	14.8%	1.2%	13.9%	2.6%	6.7%
Other strong alcoholic beverages	8.2%	2.8%	0.0%	0.2%	0.0%
Fortified wines	3.0%	0.8%	0.6%	0.1%	0.2%
Red wines	26.0%	20.8%	49.4%	8.9%	7.2%
White wines	23.0%	12.9%	22.2%	5.3%	4.6%
Sparkling wines	6.0%	3.5%	6.8%	0.7%	0.4%
Rosé wines	1.2%	3.0%	2.7%	0.3%	0.4%
Other wines	1.8%	0.3%	0.3%	0.1%	0.0%
Ciders	0.8%	2.4%	0.2%	1.6%	6.4%
RTD (Long drinks)	6.2%	1.5%	0.0%	1.6%	0.0%
Beers	8.8%	50.1%	3.4%	78.5%	74.1%
Non-alcoholic products	0.4%	0.7%	0.6%	0.0%	0.1%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

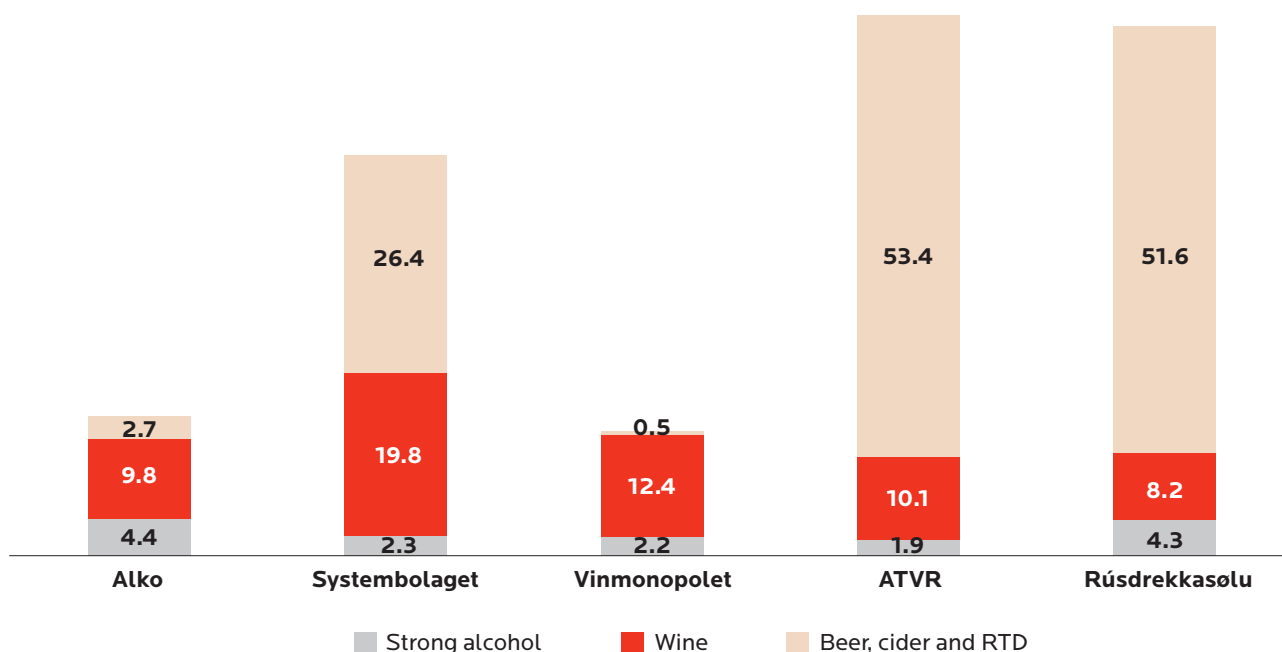


Source: Nordic alcohol monopoly companies

# Structure of sales by product groups in 2017

## Litres per capita

	Alko	Systembolaget	Vin-monopolet	ATVR	Rús-drekkasölu
Spirits	2.5	0.6	2.1	1.7	4.3
Other strong alcoholic beverages	1.4	1.4	0.0	0.2	0.0
Fortified wines	0.5	0.4	0.1	0.1	0.2
Red wines	4.4	10.2	7.5	5.8	4.6
White wines	3.9	6.3	3.4	3.5	2.9
Sparkling wines	1.0	1.7	1.0	0.5	0.3
Rosé wines	0.2	1.5	0.4	0.2	0.2
Other wines	0.3	0.2	0.0	0.0	0.0
Ciders	0.1	1.2	0.0	1.0	4.1
RTD (Long drinks)	1.1	0.7	0.0	1.1	0.0
Beers	1.5	24.4	0.5	51.3	47.6
Non-alcoholic products	0.1	0.3	0.1	0.0	0.0
<b>Total</b>	<b>16.9</b>	<b>48.8</b>	<b>15.2</b>	<b>65.3</b>	<b>64.2</b>



Source: Nordic alcohol monopoly companies

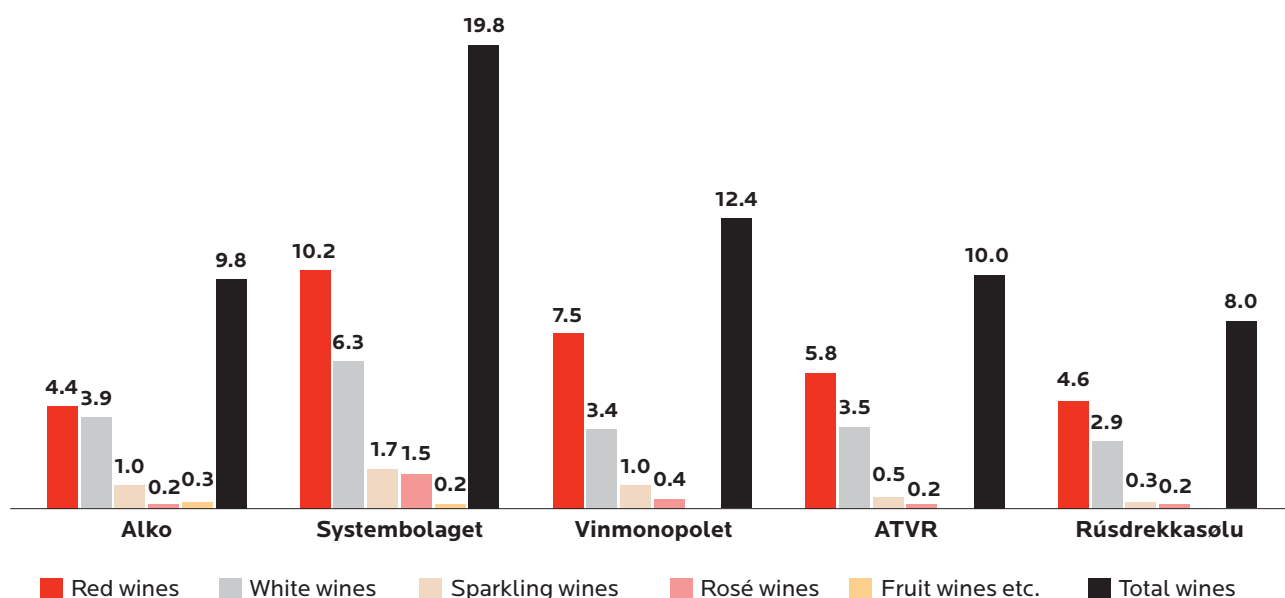
# Wine sales in 2017

## Million litres

	Alko	Systembolaget	Vinmonopolet	ATVR	Rúsdrekkasölu
Red wines	24.2	100.6	39.8	1.9	0.2
White wines	21.4	62.3	17.9	1.2	0.1
Sparkling wines	5.6	16.7	5.5	0.2	0.0
Rosé wines	1.1	14.5	2.2	0.1	0.0
Fruit wines etc.	1.7	1.5	0.2	0.0	0.0
<b>Total wines</b>	<b>54.0</b>	<b>195.6</b>	<b>65.6</b>	<b>3.3</b>	<b>0.4</b>

## Litres per capita

	Alko	Systembolaget	Vinmonopolet	ATVR	Rúsdrekkasölu
Red wines	4.4	10.2	7.5	5.8	4.6
White wines	3.9	6.3	3.4	3.5	2.9
Sparkling wines	1.0	1.7	1.0	0.5	0.3
Rosé wines	0.2	1.5	0.4	0.2	0.2
Fruit wines etc.	0.3	0.2	0.0	0.0	0.0
<b>Total wines</b>	<b>9.8</b>	<b>19.8</b>	<b>12.4</b>	<b>10.0</b>	<b>8.0</b>



Source: Nordic alcohol monopoly companies

## Social control

### Sales supervision in alcohol monopoly companies in 2017

Checks for	Alko	Vinmonopolet	ATVR	Rúsdrekkasölu
Age limit	4,600,000	1,160,810	290,000	3,230
Denied because of age limit	na	4,683	na	185
Customer shows ID spontaneously	na	2,547,417	na	6,500
Suspected intoxication	670,000	2,825	na	150
Suspected handover	395,000	672	na	30

### Age limit checks in Mystery-surveys 2008-2017

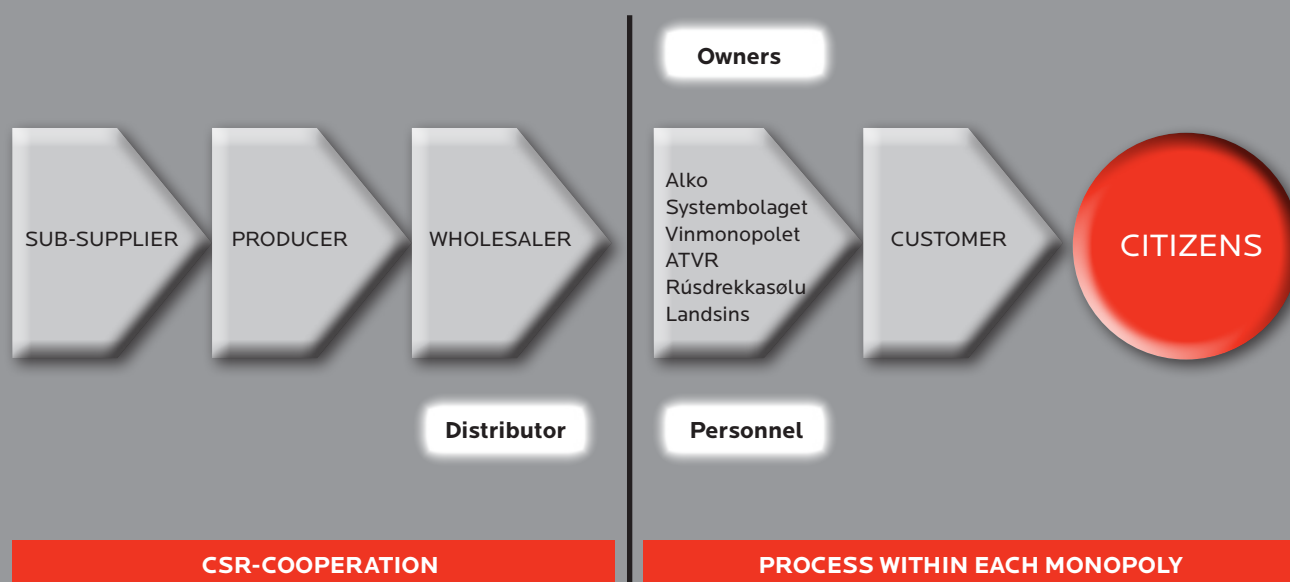
Share of age-limit checks conducted in monopoly stores, %

	Alko	Systembolaget	Vinmonopolet	ATVR	Rúsdrekkasölu
2008	51	90	na	43	na
2009	75	93	na	64	na
2010	79	94	88	75	na
2011	74	94	92	74	na
2012	82	95	86	83	na
2013	92	96	na	80	81
2014	89	97	na	87	85
2015	90	96	94	85	85
2016	91	98	94	84	95
2017	95	96	95	85	97

Source: Nordic alcohol monopoly companies

# Nordic alcohol monopoly CSR-collaboration

## Nordic alcohol monopoly companies supply chain



## Nordic Corporate Social Responsibility Cooperation

- **The Nordic alcohol monopolies take, furthermore, responsibility for working conditions, human rights issues, the environment and anti-corruption measures. The co-operation is done in the framework of Amfori. The goal is that all the products we sell are produced under socially, environmentally and ethically acceptable terms and conditions.**

- **The goals are:**

1. The workers acknowledge that the Nordic alcohol monopolies' CSR-program has improved their working and living conditions.
2. The customers in the Nordic countries want to buy from us because they are convinced that the products are safe and sustainable.

3. The suppliers recognise that we, the Nordic alcohol monopolies, are an honest and responsible business partner, and that the investments according to the Nordic alcohol monopolies' requirements have paid off.
4. The producers recognise that we, the Nordic alcohol monopolies, are an honest and responsible business partner, and that the investments according to the Nordic alcohol monopolies' requirements have paid off.
5. Society, media and non-governmental organisations say that the Nordic alcohol monopoly system is a good example of how to drive change in all sustainability aspects.

## Further information

Finland:	
Alcohol monopoly of Finland, Alko	<a href="http://www.alko.fi/en/">www.alko.fi/en/</a>
National Institute for Health and Welfare, THL	<a href="http://www.thl.fi/en/web/thlfi-en">www.thl.fi/en/web/thlfi-en</a>
National Supervisory Authority for Welfare and Health, Valvira	<a href="http://www.valvira.fi/web/en/front-page">www.valvira.fi/web/en/front-page</a>
Nordic Welfare Centre	<a href="http://www.nordicwelfare.org/en/">www.nordicwelfare.org/en/</a>
Statistics Finland	<a href="http://www.tilastokeskus.fi/index_en.html">www.tilastokeskus.fi/index_en.html</a>
Legislation	<a href="http://www.finlex.fi/en/">www.finlex.fi/en/</a>

Sweden:	
Alcohol monopoly of Sweden, Systembolaget	<a href="http://www.omsystembolaget.se/english/">www.omsystembolaget.se/english/</a>
The Swedish Council for Information on Alcohol and Other Drugs (CAN)	<a href="http://www.can.se/In-English/">www.can.se/In-English/</a>
The Public Health Agency of Sweden	<a href="http://www.folkhalsomyndigheten.se/the-public-health-agency-of-sweden/">www.folkhalsomyndigheten.se/the-public-health-agency-of-sweden/</a>
Statistics Sweden	<a href="http://www.scb.se/en/">www.scb.se/en/</a>
Legislation	<a href="http://www.riksdagen.se/en/documents-and-laws/">www.riksdagen.se/en/documents-and-laws/</a>

Norway:	
Alcohol monopoly of Norway, Vinmonopolet	<a href="http://www.vinmonopolet.no/vmp/english-category">www.vinmonopolet.no/vmp/english-category</a>
Norwegian Institute of Public Health	<a href="http://www.fhi.no/en/">www.fhi.no/en/</a>
Statistics Norway	<a href="http://www.ssb.no/en/">www.ssb.no/en/</a>
Legislation	<a href="http://www.lovdato.no/register/loverEngelsk">www.lovdato.no/register/loverEngelsk</a>

Denmark:	
Statistics Denmark	<a href="http://www.dst.dk/en">www.dst.dk/en</a>
Centre for Alcohol and Drug Research	<a href="http://www.psy.au.dk/en/research/research-centres-and-units/centre-for-alcohol-and-drug-research/">www.psy.au.dk/en/research/research-centres-and-units/centre-for-alcohol-and-drug-research/</a>
The Danish Health Authority	<a href="http://www.sst.dk/en">www.sst.dk/en</a>
Legislation	<a href="http://www.retsinformation.dk">www.retsinformation.dk</a>

Iceland:	
Alcohol monopoly of Iceland, ATVR	<a href="http://www.vinbudin.is/english/home.aspx">www.vinbudin.is/english/home.aspx</a>
Statistics Iceland	<a href="http://www.statice.is">www.statice.is</a>
Directorate of Health	<a href="http://www.landlaeknir.is/english/">www.landlaeknir.is/english/</a>
Legislation	<a href="http://www.althingi.is/lagasafn/">www.althingi.is/lagasafn/</a>

Faroe Islands:	
Alcohol monopoly of Faroe Islands, Rúsdrekkasølu	<a href="http://www.rusan.fo">www.rusan.fo</a>
Statistics Faroe Islands	<a href="http://www.hagstova.fo/en">www.hagstova.fo/en</a>
Ministry of Health	<a href="http://www.himr.fo/en/">www.himr.fo/en/</a>

Other:	
Eurostat	<a href="http://www.ec.europa.eu/eurostat">www.ec.europa.eu/eurostat</a>
WHO alcohol	<a href="http://www.who.int/topics/alcohol_drinking/en">www.who.int/topics/alcohol_drinking/en</a>
World Fact Book	<a href="http://www.cia.gov/library/publications/resources/the-world-factbook/index.html">www.cia.gov/library/publications/resources/the-world-factbook/index.html</a>
Nordic Statistics	<a href="http://www.norden.org/en/information/numbers-and-statistics">www.norden.org/en/information/numbers-and-statistics</a>
popNAD	<a href="http://www.nordicwelfare.org/popnad/en/">www.nordicwelfare.org/popnad/en/</a>





