

# INFORMATION ON THE NORDIC ALCOHOL MARKET 2023



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# INTRODUCTION

This report is the 23<sup>rd</sup> edition of the “Information on the Nordic Alcohol market” report which is a statistical summary presenting facts and figures on alcohol policy and alcohol consumption in the Nordic countries (excl. Denmark).

The report focuses on two key aspects regarding the Nordic alcohol market:

- 1)** The development of the state retail alcohol monopolies in the Nordic countries (Finland, Sweden, Norway, Iceland and Faroe Islands) in terms of relevant data and information. Most of the information provided has been retrieved directly from Alko, Systembolaget, Vinmonopolet, ATVR and Rúsdrekkasøla landsins.
- 2)** The broader picture of Nordic alcohol policy and alcohol consumption in the above-mentioned countries.

The scope of the report has been reviewed and revised to make it as unambiguous as possible. In addition, some irrelevant and outdated data has been left out as well as data that is presented somewhere else e.g., annual reports by the monopolies or statistics published by public authorities.

# COUNTRY PROFILES



# THE FAROE ISLANDS

## OVERVIEW

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

## AGE LIMITS & ADVERTISING OF ALCOHOL

The age limit is 18 for all beverages.

In Faroe Islands the advertising of alcoholic beverages stronger than 2.8 vol.% is prohibited.



The Faroese alcohol retail monopoly Rúsdrékkasøla Landsins was founded in 1992 and has the exclusive right to retail alcohol with the exception for specific brewery outlets that can sell their own products up to 5.8 vol.%. There are 8 monopoly shops out of which all are self-service stores, completed with two order points.

# ICELAND

## OVERVIEW

Iceland is the smallest Nordic country, situated in the North Atlantic. The country's current population is approximately 364,000.

## AGE LIMITS & ADVERTISING OF ALCOHOL

The age limit for both on- and off-premise sale of alcohol is 20 years.

All kind of alcohol advertising is banned.



ÁTVR is a state-owned company that has a monopoly on the sale of alcohol and tobacco. ÁTVR governs the Vínbúð- chain, that has the sole right to retail alcohol. The monopoly has 51 stores and there are about 4 800 products in the general selection and 1 300 in sale-to-order selection. It is possible to buy beverages online from the monopoly's webpage and have the goods delivered to the closest ÁTVR-store. Home delivery is possible for customers who have a distance of more than 25 km to the closest ÁTVR-store.

# FINLAND

## OVERVIEW

Finland has a population of approximately 5.5 million people with its borders to Sweden in the west, Norway in the north and Russia in the east.

## AGE LIMITS & ADVERTISING OF ALCOHOL

The age limits for purchasing alcohol in Finland are 18 for beverages milder than 22 vol.% and 20 for stronger beverages. For on-premise sale of alcohol in restaurants and bars the age limit is currently 18.

Alcohol advertising has been permitted under certain conditions for mild alcoholic beverages since 1995 when Finland joined the European Union. Finland was among the first countries to introduce comprehensive regulation of alcohol advertising on social media in 2015 with the intent to protect the Finnish youth.



Alko was founded in 1932, and in 2022 there were 373 Alko stores all across Finland, out of which all were selfservice stores. Moreover, Alko has a web shop that allows customers to order products online and pick them up at an Alko store or pick-up point. In the beginning of year 2023, the monopoly had 4 959 products available in the general selection as well as 4 725 products in the sale-to-order selection.



# NORWAY

## OVERVIEW

Norway is located west of Sweden and shares land borders with Finland and Russia in the north. The population of the country is approximately 5.4 million.

## AGE LIMITS & ADVERTISING OF ALCOHOL

The age limits are 18 for mild beverages (less than 22 vol.%) and 20 for stronger beverages (22 vol.% or more).

Marketing of alcoholic beverages that contain more than 2,5 vol.% alcohol is forbidden.



The state-owned alcohol monopoly Vinmonopolet was founded in 1922 and has the sole authority to sell beverages that contain more than 4,7 vol.% alcohol. Vinmonopolet has 344 stores in total and it is possible to order alcoholic beverages online and collect the goods from a monopoly shop or a grocery store or have the products delivered to a private address. In 2023, the monopoly had about 2,000 products in their general selection, completed with approximately 33,000 products in the sale-to-order selection



# SWEDEN

## OVERVIEW

Sweden is the largest Nordic country not only considering square kilometers, but also population which was approximately 10.4 million people in 2020. Sweden is located in the heart of Northern Europe with Norway in the west, Finland in the east and Denmark in the south with a connection through the Öresund bridge.

## AGE LIMITS & ADVERTISING OF ALCOHOL

The age limits are 20 in all beverages regarding retail and 18 in all beverages concerning on-premise sales

Up until 2003, all alcohol advertising was forbidden in Sweden. However, since then the advertisement of alcohol has been legalized under certain restrictions. All alcohol advertising must observe particular moderation and can not be directed towards people younger than 25 years. Moreover, the Alcohol Act prohibits ads for beverages containing 15 vol.% or more.



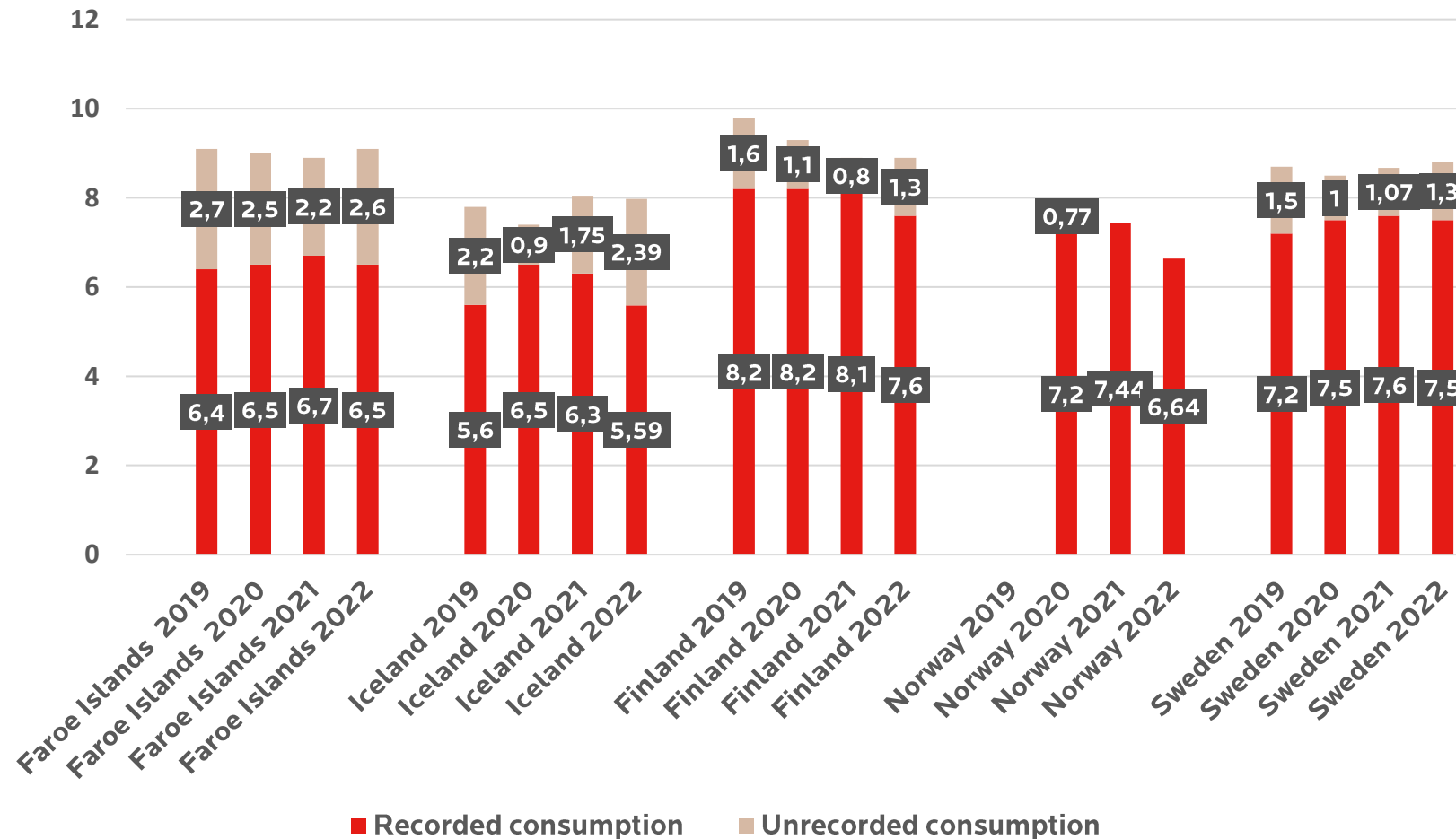
State monopoly  
Systembolaget has the sole right to off-premise retail alcohol sale with the exception of “Folköl” or “People’s beer” that contains max 3.5 vol.% and can be sold in grocery stores, gas stations and kiosks. There are altogether 449 Systembolaget-stores across Sweden, completed with 465 order points. Products can also be ordered online and delivered to monopoly shops, order points, or to the customer’s home address.



# INFORMATION ON NATIONAL ALCOHOL MARKET

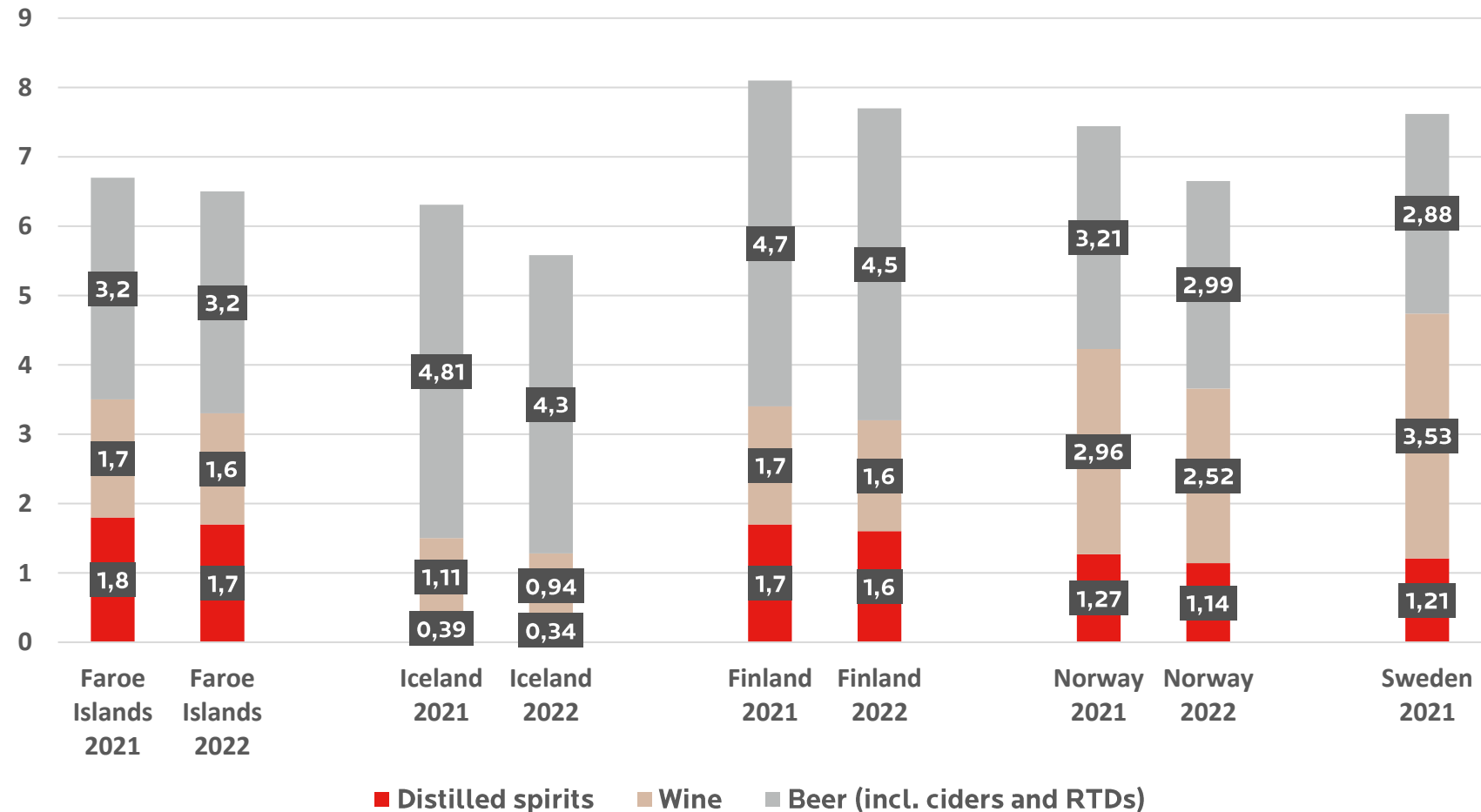
# ALCOHOL CONSUMPTION

Total alcohol consumption per capita 15 and over, 100 % alcohol



# ALCOHOL CONSUMPTION

Recorded alcohol consumption by beverage type per capita 15 and over, 100 % alcohol





# SALES CHANNELS AND MARKET SHARES IN 2022

	Number of retail outlets other than the monopoly	Producer shops
Faroe Islands	0	8*
Iceland	0	
Finland	5 745**	127
Norway	3 858	
Sweden	0	

	Number of on-premise licensed actors
Faroe Islands	98
Iceland	2 439
Finland	10 345
Norway	7 054
Sweden	13 675

	Kiosks may apply for a license to sell alcoholic beverages	Gas stations may apply for a license to sell alcoholic beverages
Faroe Islands	No	No
Iceland	No	No
Finland	Yes	Yes
Norway	No	No
Sweden	No	No

	The share of the monopoly's sales of recorded consumption
Faroe Islands	73 %
Iceland	70 %
Finland	38,8 %
Norway	-
Sweden	82,5 %

# THE NORDIC ALCOHOL MONOPOLY COMPANIES



# SCOPE OF THE NORDIC ALCOHOL MONOPOLIES

Company	The extent of the monopoly rights
<b>Rúsdrekkasölu (Faroe Islands)</b>	All alcoholic products stronger than 2,8 vol.% with the exception of beers and ciders that can be sold in brewery shops. Sale of products stronger than 60 vol.% is prohibited in the Faroe Islands.
<b>ÁTVR (Iceland)</b>	All alcoholic beverages stronger than 2,25 vol.%
<b>Alko (Finland)</b>	Alko has the sole right to retail of alcoholic products with the following exceptions: Mild beverages containing up to 5,5 vol.% can be sold in grocery stores and restaurants. In addition, independent microbrewery products and most Finnish farm winery products containing up to 13 vol.% may be sold at the premises of the production.
<b>Vinmonopolet (Norway)</b>	Vinmonopolet has the sole authority to sell beverages that contain more than 4,7 vol.% alcohol.
<b>Systembolaget (Sweden)</b>	The Swedish retail monopoly has the exclusive and sole right to retail sale of spirits, wines, strong beer (above 3,6 %) and other fermented alcoholic drinks (above 2,25 %) and alcoholic beverage preparations (above 2,25 %).





# SALES 2019–2022

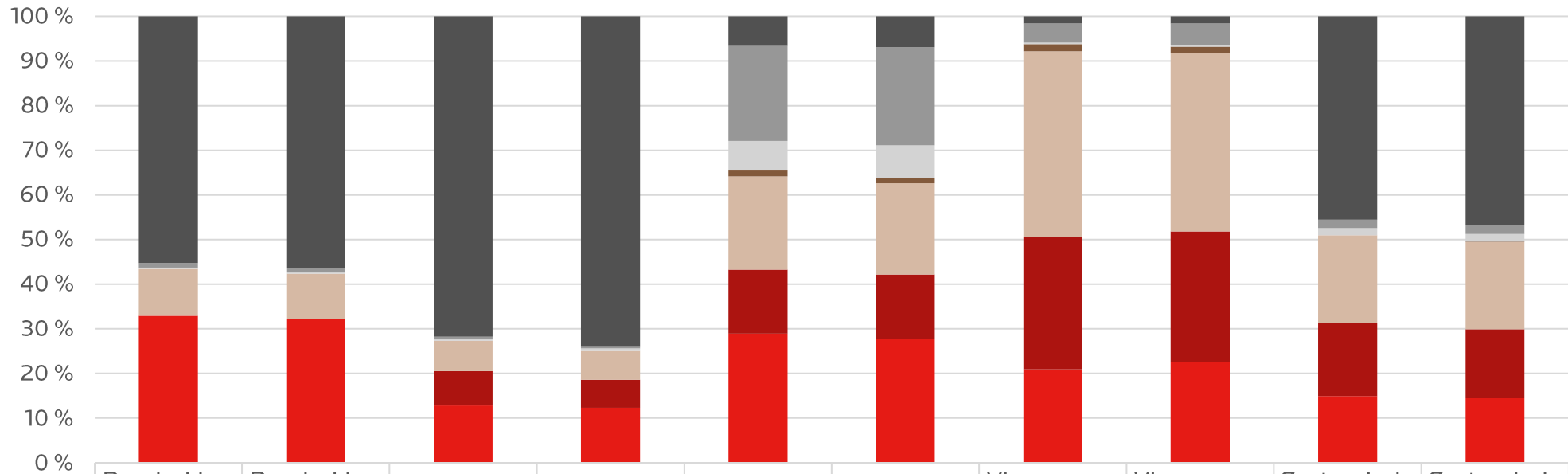
in million litres

	Rúsdrekkasölu				ÁTVR				Alko				Vinmonopolet				Systembolaget			
YEAR	-19	-20	-21	-22	-19	-20	-21	-22	-19	-20	-21	-22	-19	-20	-21	-22	-19	-20	-21	-22
Spirits	0,2	0,2	0,3	0,3	0,6	0,7	0,7	0,7	12,8	13,9	13,3	12,4	11,4	15,1	16,1	13,6	5,8	6,3	6,3	6,3
Other strong alcoholic beverages	0,0	0,0	0,0	0,0	0,1	0,1	0,1	0,1	7,3	8,3	8,3	7,9	0,0	0,0	0	0	14,8	18,2	19,7	18,6
Fortified wines	0,0	0,0	0,0	0,0	0,0	0,1	0,0	0,0	2,4	2,4	2,2	2	0,5	0,6	0,6	0,5	3,5	3,8	3,5	3,7
Red wines	0,2	0,3	0,3	0,2	1,9	2,5	2	2	21,8	25,1	23,2	20,4	38,6	54,1	53,3	42,7	98,6	105,3	101,7	97,3
White wines	0,2	0,2	0,2	0,2	1,1	1,5	1,3	1,3	20,8	24,3	23	20,8	19,0	27,4	28	23,3	65,0	71,6	71,5	69,9
Sparkling wines	0,0	0,0	0,0	0,0	0,2	0,3	0,4	0,4	5,4	6,0	6,4	5,7	5,5	8,0	8	6,9	20,4	22,2	24,6	24,3
Rose wines	0,0	0,0	0,0	0,0	0,1	0,1	0,1	0,1	1,5	2,1	2,3	1,9	2,8	4,8	5,4	4,1	15,4	18,8	18,8	17,6
Fruit wines etc	0,0	0,0	0,0	0,0	0,0	0,0	0	0	1,4	1,4	1,2	1	0,1	0,2	1,8	1,5	1,7	1,7	1,8	1,9
Ciders	0,3	0,2	0,2	0,2	0,2	0,2	0,2	0,2	0,5	0,5	0,5	0,4	0,2	0,3	0,4	0,3	13,7	14,1	14,9	15,7
RTD (long drinks)	0,0	0,0	0,0	0,0	0,5	0,7	0,8	0,8	2,5	2,6	2,5	2,2	0,0	0,4	0	0	8,7	9,9	11,0	11,2
Beer	2,4	2,4	2,5	2,5	17,7	20,6	18,6	18,6	5,1	5,5	5,4	4,9	2,9	3,9	4,2	3,5	260,4	293,9	299,5	288,8
Non-alcoholic beverages	0,0	0,0	0,0	0,0	0,0	0,0	0	0	0,5	0,6	0,7	0,7	0,6	0,7	0,8	0,9	3,7	3,2	3,3	3,3
<b>TOTAL litres</b>	<b>3,3</b>	<b>3,3</b>	<b>3,5</b>	<b>3,5</b>	<b>22,6</b>	<b>26,8</b>	<b>26,1</b>	<b>24,2</b>	<b>82</b>	<b>92,7</b>	<b>89</b>	<b>80,3</b>	<b>81,6</b>	<b>115,5</b>	<b>118,4</b>	<b>97,3</b>	<b>511,7</b>	<b>569,0</b>	<b>576,6</b>	<b>558,6</b>

# SALES IN DIFFERENT PACKAGING

Share of sales (litres) in different package formats in 2022

■ Glass bottles ■ Light-weight glass bottles ■ Bag-inboxes ■ Pouches ■ Tetra packs ■ PET bottles ■ Aluminium cans



	Rusdrekkas olu 2021	Rusdrekkas olu 2022	ATVR 2021	ATVR 2022	Alko 2021	Alko 2022	Vinmonopo let 2021	Vinmonopo let 2022	Systembola get 2021	Systembola get 2022
■ Aluminium cans	54,60%	55,60%	71,70%	73,90%	6,60%	6,90%	1,60%	1,60%	45,50%	46,80%
■ PET bottles	1,00%	1,00%	0,50%	0,50%	21,30%	22,00%	4,30%	4,80%	1,90%	2%
■ Tetra packs	0,30%	0,30%	0,40%	0,40%	6,60%	7,20%	0,30%	0,40%	1,60%	1,70%
■ Pouches	0,00%	0,00%	0%	0%	1,30%	1,30%	1,60%	1,50%	0%	0,10%
■ Bag-inboxes	10,40%	10,10%	6,80%	6,60%	20,90%	20,40%	41,70%	40%	19,60%	19,60%
■ Light-weight glass bottles	0,00%	0,00%	7,70%	6,30%	14,30%	14,50%	29,70%	29,40%	16,40%	15,30%
■ Glass bottles	32,50%	31,70%	12,80%	12,30%	28,90%	27,70%	21%	22,60%	14,90%	14,60%

# SELECTIONS

	General selection	Sale-to-order-selection
Rúsdrekkasölu	1 850	2 500
ÁTVR	4 813	1 312
Alko	4 959 + Seasonal and Special edition products 1677	4 725
Vinmonopolet	2 000	33 000
Systembolaget	2 821 (general selection) + 4 123 in (temporary selection)	15 096



# SOCIAL CONTROL

Results of the mystery shopping surveys

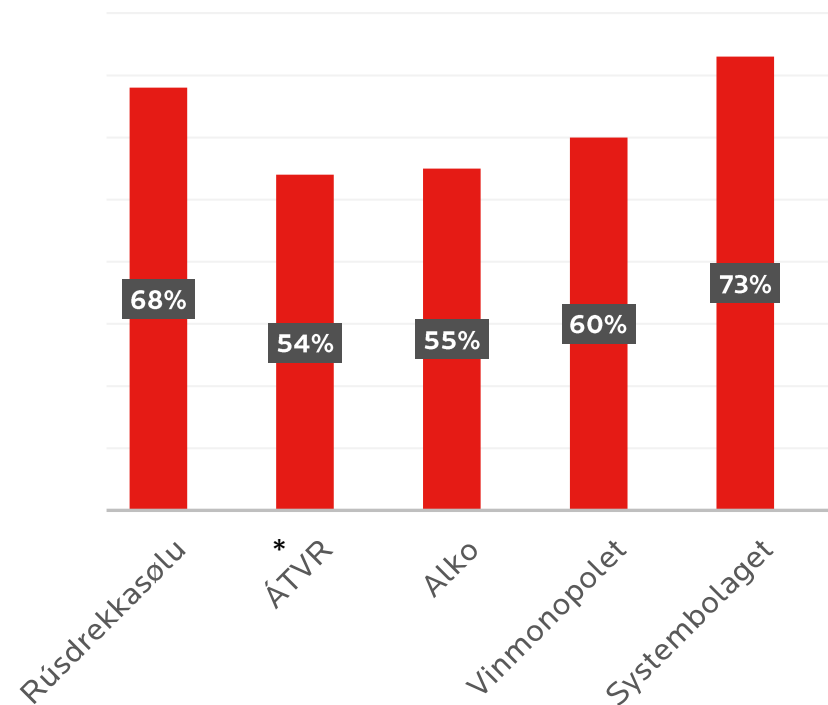
	Rúsdrekkasölu	ÁTVR	Alko	Vinmonopolet	Systembolaget
2010	na	75 %	79 %	88 %	94 %
2011	na	74 %	74 %	92 %	94 %
2012	na	83 %	82 %	86 %	95 %
2013	81 %	80 %	92 %	Na	96 %
2014	85 %	87 %	89 %	Na	97 %
2015	85 %	85 %	90 %	94 %	96 %
2016	95 %	84 %	91 %	94 %	98 %
2017	97 %	85 %	95 %	95 %	96 %
2018	96 %	87 %	95 %	93 %	96 %
2019	94 %	83 %	96 %	96 %	96 %
2020	-	78 %	98 %	91 %	96 %
2021	-	76 %	94 %	93 %	97 %
2022	96 %	83 %	97 %	96 %	97 %



# PUBLIC OPINION IN 2022

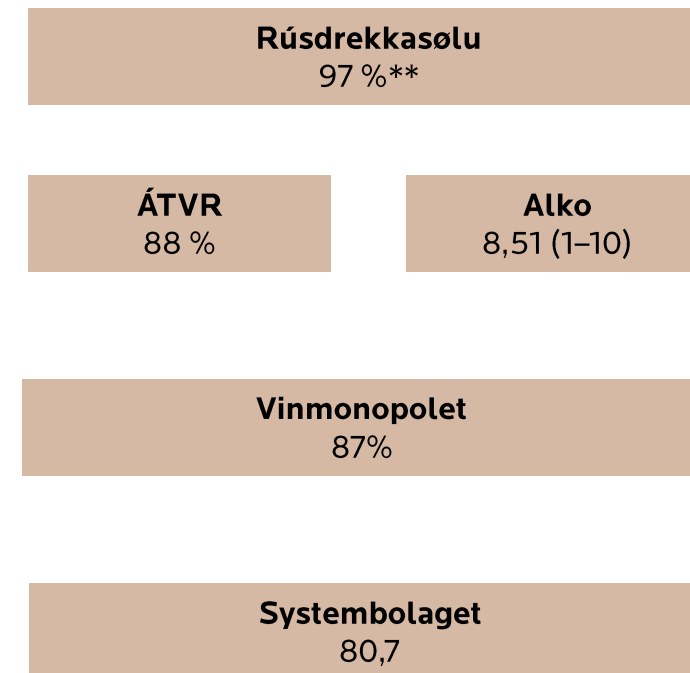
Surveys are not comparable between monopolies

## Public support on alcohol policy or monopoly



\* 2021

## Customer satisfaction



\*\* 2021

