



INFORMATION ON THE NORDIC ALCOHOL MARKET 2014





Alko Inc.

National Institute for Health and Welfare (THL)

© Authors and Alko Inc.

Authors: Johanna Hallberg, Alko Inc., Finance

Esa Österberg, National Institute for Health and Welfare
(THL), Department of Alcohol, Drugs and Addiction

Helsinki 2014

ISBN-13 978-951-8913-85-9



Table of contents

Introduction	4
Summary	5
Concepts	10
Populations and national economies	11
Basic characteristics of the alcohol system	
Regulations on alcohol advertising	12
Minimum legal age for purchasing alcoholic beverages	13
Scope of the Nordic alcohol monopoly companies	14
Sales network of the Nordic alcohol monopoly companies	16
Opening hours of the alcohol monopoly company stores	17
Other off-premise retail sale outlets for alcoholic beverages	18
On-premise retail sale networks for alcoholic beverages	19
Taxation of alcohol	
Alcohol excise duties and value-added taxes in the Nordic countries	20
Alcohol excise duties in the EU and some other countries	21
Pricing principles of the Nordic alcohol monopoly companies	22
Price examples in the Nordic alcohol monopoly companies	24
Travelers' imports of alcoholic beverages	
Travelers' alcohol import quotas in litres	25
Travelers' alcohol imports	26
Consumption of alcoholic beverages	
Total alcohol consumption	27
Recorded alcohol consumption in the Nordic countries	28
The Nordic alcohol monopoly companies	
Public opinion on alcohol policy	30
Customer satisfaction rates in the Nordic alcohol monopoly companies	31
Personnel and beverage brands	32
Packaging	33
Total sales	34
Sales by product groups	35
Structure of sales by product groups	36
Wine sales	38
Social control	39
Nordic alcohol monopoly CSR-cooperation	40
Links to further information	41



Introduction

The “**INFORMATION ON THE NORDIC ALCOHOL MARKET**” –report contains information on national economies and populations, Nordic alcohol systems, taxation of alcoholic beverages, alcohol consumption and travelers' imports of alcoholic beverages in the Nordic countries as well as selling and pricing of alcoholic beverages by the Nordic alcohol monopoly companies. The report also includes information about public opinion on alcohol policy and customer satisfaction rates of the alcohol monopoly companies. Information on the Nordic alcohol monopoly companies is also given with regard to personnel, beverage brands, packaging, sales, social control and Nordic CSR cooperation. The countries included in the review are Finland, Iceland, Norway and Sweden with state off-premise retail alcohol monopoly companies, as well as Denmark which has no tradition of state alcohol monopolies. The off-premise alcohol retail monopoly company in the Faroe Islands (an autonomous part of Denmark), Rúsdrékkasølu, is also included in this report.

THIS REPORT gathered by Alko Inc. is part of a series of reports, first gathered for Alko's own purposes in 1999. Alko has since then expanded the comparative statistics of the Nordic countries. However, statistics on alcohol-related harms are not included in this report as to avoid overlapping with other publications like the *Nordic Alcohol Statistics*. *Information on the Nordic Alcohol Market* has now for the tenth time been published in English. This report will also be distributed outside Alko Inc. like to the other Nordic alcohol monopoly companies and alcohol monopolies in Canada and the United States as well as civil servants, alcohol researchers and other stakeholders.

THIS PUBLICATION has been compiled by Johanna Hallberg (johanna.hallberg@alko.fi), Alko Inc., Finance and Esa Österberg (esa.osterberg@thl.fi) National Institute for Health and Welfare (THL), Department of Alcohol, Drugs and Addiction.



Summary

Populations and national economies

By population the Nordic countries are small countries in the European scale. Sweden, with its 9.7 million inhabitants, is the largest Nordic country followed by Denmark with 5.6 million and Finland with 5.5 million inhabitants. The Norwegian population is 5.2 million, and that of Iceland is 0.3 million. The Faroe Islands, an autonomous region of Denmark, has 50 000 inhabitants.

The Nordic countries have stable national economies with similar economic developments. The gross domestic product (GDP) corrected according to purchasing power parity is EUR 41 700 per capita in Norway and between EUR 27 000 and EUR 30 800 per capita in all other Nordic countries.

Advertising of alcoholic beverages

All advertising of alcoholic beverages is prohibited by law in Norway, Iceland and the Faroe Islands. In Finland and Sweden, advertising of strong alcoholic beverages is prohibited by law. In Denmark the advertising of alcoholic beverages is regulated by voluntary agreements.

The minimum legal age limits for purchasing alcohol

In Iceland, the minimum legal age for purchasing alcoholic beverages is 20 years, for both off- and on-premise retail sales. The same minimum age is also applied in Norway, for on- and off-premise purchases of strong alcoholic beverages, and in Sweden for off-premise purchase of all alcoholic beverages in Systembolaget. The same applies for Finland for off-premise purchases of strong alcoholic beverages. In Denmark, the minimum legal age for off-premise purchase of alcohol is 16 years for wine and beer and 18 for strong alcoholic beverages. In other instances, the age limit for purchasing alcohol off-and on-premise is 18 years in the Nordic countries.

The scope of the alcohol monopolies in the Nordic countries

With the exception of Denmark, all the Nordic countries have a state-owned off-premise retail alcohol monopoly. The extent of the monopoly rights, however, is different. The alcohol monopoly in Iceland, ATVR, has a monopoly on the retail sale of all beverages over 2.25 per cent alcohol by volume; in Norway there is a monopoly of all alcoholic beverages over 4.7 per cent by volume. Consequently, alcoholic beverages up to 4.7 per cent alcohol by volume can be sold in ordinary grocery stores.

In Sweden the equivalent limit is 2.25 per cent alcohol by volume, except for beer up to 3.5 per cent alcohol by volume, which can also be sold in grocery stores, kiosks and petrol stations. In the Faroe Islands all alcoholic beverages over 2.8 per cent by volume are sold in monopoly stores with the exception of beer, which can also be sold by producers in the brewery outlets.

In Finland, all alcoholic beverages over 4.7 per cent alcohol by volume are sold in monopoly stores with two exceptions. First, Finnish farm wineries can sell their own berry-wines containing a maximum of 13 per cent alcohol by volume as off-premises sales. The same goes for Finnish sahti-producers, sahti being a traditional Finnish ale. Secondly, the off-premise retail sale of beverages containing distilled alcohol over 2.8 per is only permitted in the alcohol monopoly's stores. Besides ordinary grocery stores, fermented beverages (beer, cider or long drinks) up to 4.7 per cent alcohol by volume can also be sold in kiosks and petrol stations.



Summary (continues)

ATVR's, Systembolaget's and Rúsdrekkasölu's market shares of the recorded alcohol consumption are between 74 and 79 per cent. The corresponding shares for Vinmonopolet and Alko are 47 and 41 per cent respectively. To a large extent, the differences in market shares are explained by the fact that in Finland and Norway, medium strength beer is sold in grocery stores whereas in Sweden, Iceland and the Faroe Islands, medium strength beer is sold only through the alcohol monopoly companies. When compared to the total alcohol consumption, Systembolaget's market share is reduced to 63 per cent, Vinmonopolet's to 38 per cent and Alko's to 33 per cent mostly due to the extent of unrecorded consumption, consisting mainly of travelers' alcohol imports. For ATVR and Rúsdrekkasölu the share of the total alcohol consumption is nearly 70 per cent.

Sales networks of the alcohol monopoly companies

The number of retail sale stores of the alcohol monopoly companies in relation to the population is highest in Iceland and the Faroe Islands. In Finland, the number of stores per capita is higher than in Sweden, although there are notably more order points in Sweden than in Finland. In Norway, the number of alcohol monopoly retail stores per capita is between that in Sweden and Finland. In Norway the alcohol monopoly does not have any order points.

The availability of alcoholic beverages in the Nordic countries is further endorsed by the postal deliveries of orders made to the monopolies. In Norway and Iceland it is also possible to order alcoholic beverages from the monopoly's websites, and in Sweden there is a ongoing experiment with internet sales in a limited number of municipalities. In Finland, Norway and the Faroe Islands, all alcohol monopoly stores are self-service stores. The number of self-service stores has also increased rapidly in recent years in Sweden and Iceland.

The opening hours of alcohol monopoly stores are longest in Finland. Alko stores are open 64 hours per week. In Iceland the longest weekly total hours of service is 57 and in Sweden 55. The most typical weekly total hours of service are 50 and 46 in Sweden and Norway respectively, 43 in Iceland and 29.5 in the Faroe Islands. In all the Nordic countries, the alcohol monopoly stores are closed on Sundays.

Other sales networks of alcohol

In Finland, Sweden and Norway, alcoholic beverages are available in grocery stores. In Sweden, grocery stores can only sell beer containing at most 3.5 per cent of alcohol by volume. In Finland, grocery stores are allowed to sell fermented beverages containing at most 4.7 per cent of alcohol by volume, and in Norway all alcoholic beverages containing at most 4.7 per cent of alcohol by volume. In Finland and Sweden, retail sale is allowed also in kiosks and in gas stations. Furthermore, in Finland, wine farms located outside densely populated areas have the right to sell their own wine products up to 13 per cent alcohol by volume directly to consumers off-the premise. Similarly, in the Faroe Islands breweries are allowed to sell their own beer products off-the premise to consumers. In Finland, Iceland and Sweden citizens can legally acquire alcoholic beverages also via internet from abroad but according to the law they should pay domestic excise duties on them.



Summary (continues)

Iceland has the largest number of restaurants per capita, 242 restaurants per 100 000 inhabitants. Sweden and The Faroe Islands have the smallest number, 121 and 134 restaurants per 100 000 inhabitants respectively. Norway has 141 restaurants and Finland has 151 restaurants per 100 000 inhabitants. A majority of restaurants are licensed to serve all alcoholic beverages. In Finland, however, approximately 30 per cent of all restaurants are allowed to serve only wine and beer or only beer.

Taxation of alcohol

On a European level the Nordic countries stand out as countries with high alcohol taxation. In a Nordic comparison, taxation is lowest in Denmark and highest in Norway. In all the Nordic countries, except Iceland, the tax on strong alcoholic beverages is heavier than the tax on other alcoholic beverages. The taxation of intermediate products is also heavier than that on wine and beer in all Nordic countries except Norway and Denmark. In Norway the tax per centiliter of ethyl alcohol is the same for intermediate products, wine and beer. In Finland the taxation of spirits is notably lower than in Sweden, but the taxation of all other alcoholic beverages is higher in Finland than in Sweden. In Iceland and Finland the tax on beer is higher than that on wine. In Sweden, Faroe Islands and Denmark the tax on beer is slightly lower than that on wine.

Pricing in alcohol monopolies

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 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, Sweden and Norway, 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.

Prices of alcohol beverages

Each of the monopolies have fixed prices for all alcoholic beverage brands, meaning the prices do not vary between the national monopoly stores in different parts of a country. Of all Nordic countries, Denmark has the lowest prices of alcoholic beverages. However, the pricing information for Denmark is not presented in this report, as the prices vary from store to store. In addition to the fluctuations in the currencies, the high excise duty on alcohol in the Nordic countries indicates that the prices of alcoholic beverages varies according to the country in question, mainly in compliance with the alcohol tax. This explains the relatively low prices in Denmark.



Summary (continues)

Travelers' imports of alcoholic beverages

In the beginning of 2004, the possibilities for Finnish, Swedish and Danish travelers to import alcoholic beverages tax-free from other EU countries increased considerably when quotas for travelers tax free alcohol imports were abandoned. Tax-free import of alcoholic beverages from countries outside the EU is still regulated by quotas in all EU countries. In Norway, Iceland and the Faroe Islands, these import quotas apply to all countries visited.

The estimates and research results of alcoholic beverages imported by travelers differ considerably both by amounts and by the year the amounts have been estimated for. In Norway, the amount of travelers' tax-free imports of alcoholic beverages was in 2007 about 0.7 litres and Denmark in 2010 about 0.9 litres of alcohol per capita. In 2013 the equivalent amount was in Finland twice as high or 1.7 litres and in Sweden 1.3 litres. In Iceland and the Faroe Islands alcohol imports figures per capita are clearly lower than in other Nordic countries.

Total consumption of alcoholic beverages

The Finnish total consumption of alcohol in 2013 was about 9.7 litres per capita. In Denmark the corresponding figure was about 8.8 litres, followed by Sweden with a total alcohol consumption of about 8.2 litres per capita. In Norway it was lower than in Sweden, 6.4 litres per capita. In the Nordic countries the lowest per capita alcohol consumption is found in Iceland and the Faroe Islands where it is estimated to be 6.1 and 5.6 litres per capita in 2013.

The share of unrecorded alcohol consumption is estimated to be around one fifth of the total alcohol consumption in Finland, Norway and Sweden. In Denmark, Iceland and the Faroe Islands unrecorded consumption is about one tenth of total alcohol consumption.

Recorded alcohol consumption has risen in all Nordic countries since the beginning of the 1960s. In 1961, recorded consumption of alcohol was about 4.5 litres per capita in Sweden and Denmark. In Norway it was almost 3 litres. In Finland, Iceland and the Faroe Islands recorded alcohol consumption was about 2 litres.

The increase in alcohol consumption was particularly strong in the 1960s and 1970s. In Denmark, recorded annual consumption of alcohol reached the 10-litre level in the beginning of the 1980s, and has since then decreased to 7.8 litres. In Sweden, the recorded consumption of alcohol is currently about on the same level as it was in the beginning of the 1970s, i.e. some 6 litres per capita.

During the past decade, the consumption of alcohol has increased in all Nordic countries except Denmark. In 2013 the recorded consumption of alcohol per capita in Denmark was 7.8 litres, in Finland it was 7.6 litres; in Sweden it was a little over 6 litres and in the Faroe Islands, Norway and Iceland was between 5.0 and 5.6 litres.

Consumption of alcoholic beverages by product groups

Per capita consumption of strong alcoholic beverages is 2.1 litres of pure alcohol in Finland. This figure includes 0.3 litres of long drinks. In the Faroe Islands 1.5 litres of strong alcoholic beverages are consumed yearly. In Denmark the corresponding figure is 1.4 litres. In Sweden, Norway and Iceland the consumption of strong alcoholic beverages is little less than 1 liter per capita. In all Nordic countries, the recorded consumption of strong alcoholic beverages was higher in the middle of the 1980s than at present.



Summary (continues)

During recent decades, the annual recorded consumption of wine has increased in all Nordic countries, being highest in Denmark, 33 litres. In Sweden recorded consumption of wine is higher than in Norway, Iceland and Finland, about 10 litres per capita. The lowest recorded consumption of wine – some 9 litres - is found in the Faroe Islands.

In tandem with the overall consumption, beer consumption went up in all Nordic countries in the 1960s and 1970s. Since then it has come down in Denmark. In Norway it has slightly increased. In Finland the recorded consumption of beer did increase in the 1980s, but has then settled. Also in Sweden, recorded consumption of beer increased in the 1980s, but has decreased since then. In the Faroe Islands and especially in Iceland, the recorded consumption of beer has increased since the 1970s. At the moment in Finland and Denmark the recorded consumption of beer is about 80 litres per capita. In Iceland recorded consumption of beer is about 60 litres and in Norway, Sweden and Faroe Islands about 45 litres per capita a year.

Public opinion on alcohol policy and customer satisfaction rates

In all Nordic countries, public opinion surveys on alcohol policy show that the majority of the population is satisfied with the present alcohol restrictions. This applies in particular to the legal minimum age limits for alcohol purchase. A large part of the general public wants to limit the sale of wines to the monopoly outlets and do not wish to extend the sales to grocery stores. The inhabitants of Finland, Iceland, Norway and Sweden have been asked about their attitude to the monopolies' sole right to sell alcoholic beverages with regard to restricting the harmful effects of alcohol. Roughly two-thirds of the respondents support the present monopolies' sole right to sell alcoholic beverages. The customer satisfaction for the alcohol monopoly companies has stayed on a high level during the last years.

Nordic partnership: A sustainable supply chain

The Nordic alcohol monopolies have worked, since 2008, in close partnership on the subject of 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 we have towards our business partners. The principles and values represent the aspirational goals and minimum expectations that Nordic alcohol monopolies have with regard to our 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 see ways to abide by the principles that provide the highest protection to the workers and environment. The Nordic alcohol monopolies value cooperation, constructive and open dialogue in order to strive continuous improvement in the supply chains.



Concepts

Alcoholic beverage: The concept of alcoholic beverage is defined differently in different countries and in different contexts. In general, alcoholic beverage is defined as a beverage containing ethyl alcohol intended for consumption by drinking. The minimum alcohol content for a beverage to be alcoholic varies in the Nordic countries: in Sweden and Iceland it is 2.25 per cent of ethyl alcohol by volume, in Norway 2.75 per cent, in Finland and the Faroe Islands 2.8 per cent of ethyl alcohol by volume. The Danish legislation has no general definition for an alcoholic beverage.

Off-premise retail sale of alcoholic beverages: Domestic sales of alcoholic beverages to consumers, when alcoholic beverages are not consumed in the place of sale. In practice this means selling alcoholic beverages in the alcohol monopoly stores, grocery stores, kiosks and gasoline stations or other similar shops.

On-premise retail sale of alcoholic beverages: Domestic selling of alcoholic beverages to consumers, when alcoholic beverages are consumed in the place of sale. In practice these would include selling of alcoholic beverages in restaurants, bars, cafés and other similar places.

Alcohol monopoly: An alcohol monopoly has sole right for off premise retail selling of all alcoholic beverages or majority of alcoholic beverages prescribed by law.

Total consumption of alcoholic beverages: The sum of recorded and unrecorded consumption of alcoholic beverages.

Recorded consumption of alcoholic beverages: The sum of domestic off-premise retail sale and on-premise retail sale of alcoholic beverages.

Unrecorded alcohol consumption: Alcoholic beverages imported by travelers minus alcoholic beverages exported by foreign travelers, home brewed and fermented alcoholic beverages and illegal private distilling, smuggling, substitutes of alcohol. In Finland, alcohol consumed by Finnish tourists abroad is also included in unrecorded alcohol consumption. In other Nordic countries the amount of alcohol consumed by tourists abroad is not included in unrecorded consumption.

Purchasing power parity GDP: The value of the total production of national economy, taking into account the purchasing power of consumers.

Inflation: The change in consumer prices per year.

Unemployment rate: The percentage of unemployed labor force

Labor force: The number of employed and unemployed labor together

Exchange rates: The price comparisons on page 23 have been converted into euros according to the exchange rates of average year 2013. According to these rates one euro equals SEK 8.6515, NOK 7.8067, ISK 162.38, DKK 7.4579. Thus alcohol excise duty on pages 19-20 has been converted into euros exchange rates of SEK 8.6329, NOK 8.131, ISK 156.68, DKK 7.4582. The exchange rate one euro for USD is 1.3281.



Populations and national economies in 2013

	GDP, billion, €	GDP, Purchasing power parity, € per capita	GDP, average growth in 2009–2013, %
Finland	195	27 031	-0,6
Sweden	416	30 796	1,7
Norway	388	41 714	1,1
Denmark	244	28 462	-0,3
Iceland	11,0	30 645	-0,8
Faroe Islands	1,7 ¹⁾	22 965 ¹⁾	0,6 ²⁾

	Average inflation in 2009–2013, %	Labour force, million	Unemployment rate, %
Finland	2,0	2,69	8,1
Sweden	0,8	5,11	8,1
Norway	1,7	2,71	3,6
Denmark	1,9	2,80	6,0
Iceland	6,0	0,18	4,5
Faroe Islands	0,9	0,02	4,3

	Population, million	Population, 15 years and older, million	Age structure , percentage of age group, %		
			0–14	15–64	65 and over
Finland	5,45	4,59	16	65	19
Sweden	9,72	8,08	17	63	21
Norway	5,15	4,21	18	65	17
Denmark	5,56	4,61	17	65	18
Iceland	0,32	0,25	20	67	13
Faroe Islands	0,05	0,04	20	64	15

1) 2010

2) Average growth in 2009-2010, %



Regulations on alcohol advertising

Situation as at 1st January 2014

- Finland:** Advertising of alcoholic beverages at most 22 per cent alcohol by volume is allowed. The content of the advertisements is restricted and restrictions apply to all beverages containing over 1.2 per cent alcohol by volume. Advertising in television is forbidden from 7 a.m. to 9 p.m.. (Alcohol Act, Chapter 5, §33)
- Sweden:** Advertising of alcoholic beverages at most 15 per cent by volume is allowed. The content of the advertisements is restricted. It is forbidden by law to advertise alcohol in radio or television. (Alcohol Act, Chapter 4, §11)
- Norway:** Advertising of all alcoholic beverages over 2.5 per cent alcohol by volume is prohibited by the Alcohol Act. (Alcohol Act, Chapter 9, §2)
- Denmark:** Advertising of alcoholic beverages is mostly regulated by voluntary agreements. It is, however, forbidden by law to advertise alcohol to the youth as well as place advertising in radio or tv-programs meant for young people.
- Iceland:** Advertising of all alcoholic beverages, i.e. beverages over 2.25 per cent alcohol by volume, is prohibited by the Alcohol Act.
- Faroe Islands:** Advertising of all alcoholic beverages, i.e. beverages over 2.8 per cent alcohol by volume, is prohibited by the Alcohol Act.



Minimum legal age for purchasing alcoholic beverages

Situation as at 1st January 2014

	Off-premise retail sale	
	Mild alcoholic beverages	Strong alcoholic beverages
Finland	18	20
Sweden	20	20
Norway	18	20
Denmark	16	18
Iceland	20	20
Faroe Islands	18	18

	On-premise retail sale	
	Mild alcoholic beverages	Strong alcoholic beverages
Finland	18	18
Sweden	18	18
Norway	18	20
Denmark	18	18
Iceland	20	20
Faroe Islands	18	18

Finland: Alcohol content of mild alcoholic beverages is 22 % alcohol by volume at most. The age limit for purchasing mild alcoholic beverages applies to all beverages containing a minimum of 1.2 % of alcohol by volume.

Sweden: The age limit of purchasing light medium beer ("Folköl" in Swedish) with an alcohol content between 2.8 and 3.5 % alcohol by volume is 18 years.

Norway: The age limit of purchasing mild alcoholic beverages applies to all beverages containing a minimum of 1.2 % alcohol by volume. The limit of strong alcoholic beverages is 22 % or more alcohol by volume.

Denmark: The age limit of purchasing alcoholic beverages applies to all beverages containing a minimum of 1.2 % alcohol by volume. Minimum legal age for strong alcoholic beverages applies to all alcoholic beverages containing more than 16.5 % alcohol by volume.



Scope of the Nordic alcohol monopoly companies

The extent of the monopoly rights

Situation as at 1st January 2014

Alko (Finland)

Alcoholic beverages, beverages with an alcohol content over 2.8 % by volume with the exception of fermented alcoholic beverages with an alcohol content of 4.7 % by volume at most and Finnish farm winery products 13 % by volume at most.

Systembolaget (Sweden)

Alcoholic beverages, beverages with an alcohol content of over 2.25 % by volume with the exception of beers with an alcohol content of 3.5 % by volume at most.

Vinmonopolet (Norway)

All alcoholic beverages with an alcohol content over 4.7 % by volume.

ATVR (Iceland)

All alcoholic beverages, beverages with an alcohol content over 2.25 % by volume.

Rúsdrekkasølu (Faroe Islands)

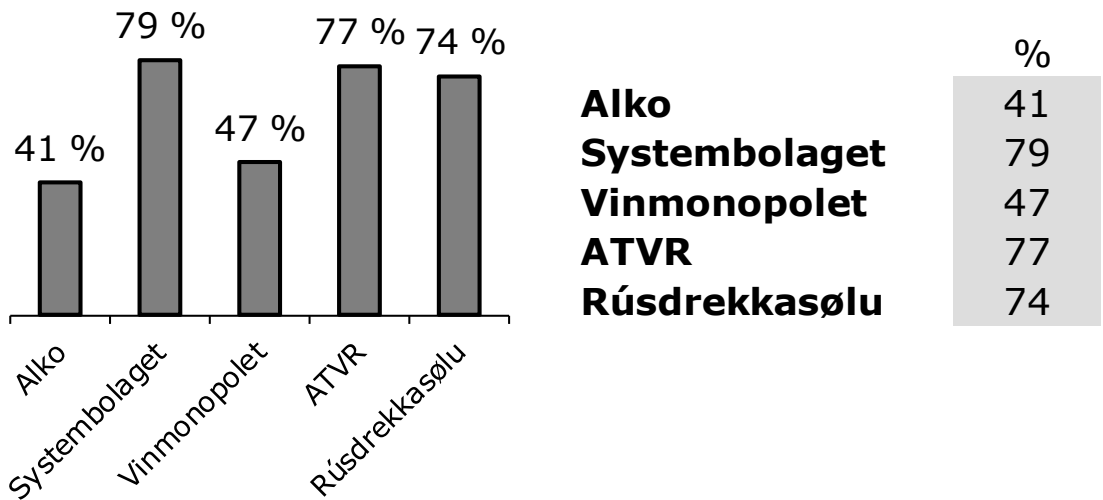
Alcoholic beverages, beverages with an alcohol content over 2.8 % by volume to an alcohol content not exceeding 60.0 % by volume. Exception of beers and ciders with an alcohol content 5.8 % by volume at most in beer producer's shops.



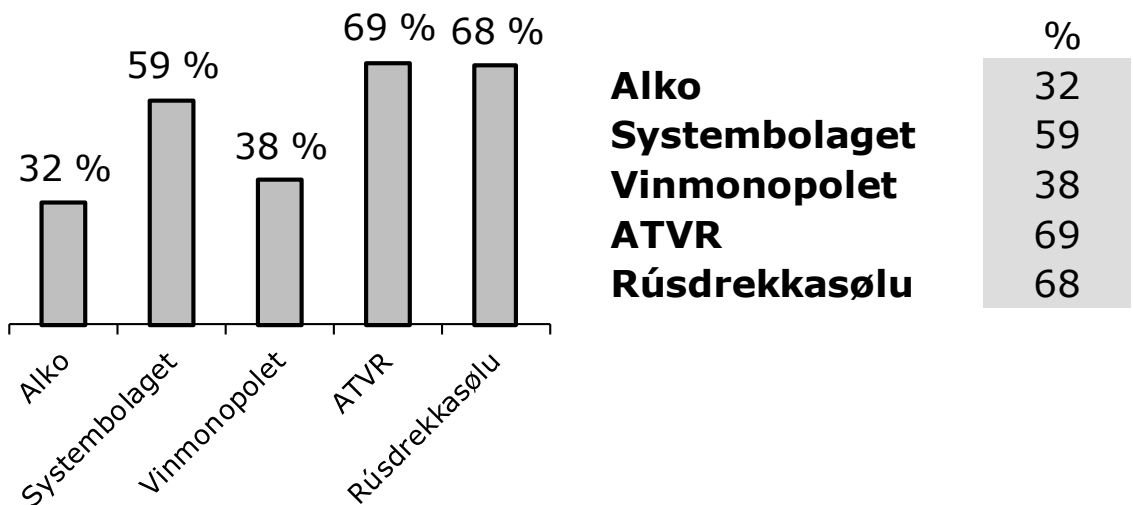
Scope of the Nordic alcohol monopoly companies

Market shares 2013

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





Sales network of the Nordic alcohol monopoly companies

Situation as at 1st January 2014

Off-premise retail stores of the Nordic alcohol monopoly companies

	Number of stores	Stores per 100 000 inhabitants	Proportion of self-service stores %	Number of order points
Finland	348	6,4	100	102
Sweden	426	4,4	99	500
Norway	290	5,6	100	0
Iceland	48	15,1	94	0
Faroe Islands	6	12,0	100	2

Sales by mail and internet

	Sales by mail	Sales by Internet	Notes
Finland	yes	no	In sparsely populated areas.
Sweden	yes	yes	The goods are delivered to Systembolaget stores. There is also a trial of home delivery in selected areas.
Norway	yes	yes	The goods are mainly delivered by mail or to Vinmonopolet stores. Also home delivery in selected areas.
Iceland	yes	yes	The goods are delivered to ATVR stores. Also home delivery to customers which have a distance of more than 25 km from ATVR store. The post office checks the age limit in those instances.
Faroe Islands	yes	no	By the post office where age verification control is made.



Opening hours of the alcohol monopoly company stores

The most common opening hours 1st January 2014

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total per week
Finland	9-20	9-20	9-20	9-20	9-20	9-18	closed	64
Sweden	10-19	10-19	10-19	10-19	10-19	10-15	closed	50
Norway	10-18	10-18	10-18	10-18	10-18	9-15	closed	46
Iceland	11-18	11-18	11-18	11-18	11-19	11-18	closed	43
Faroe Islands	13-17.30	13-17.30	13-17.30	13-17.30	10-17.30	10-14	closed	29.5

The longest opening hours 1st January 2014

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total per week
Finland	9-20	9-20	9-20	9-20	9-20	9-18	closed	64
Sweden	10-20	10-20	10-20	10-20	10-20	10-15	closed	55
Norway	10-18	10-18	10-18	10-18	9-18	9-15	closed	47
Iceland	10-20	10-20	10-20	10-20	10-20	11-18	closed	57
Faroe Islands	10-17.30	10-17.30	10-17.30	10-17.30	10-19	10-14	closed	43



Other off-premise retail sale outlets for alcoholic beverages

	Year	Other retail outlets	Producers shops ¹⁾	Other retail outlets per 100 000 inhabitants
Finland	2013	5 371 ²⁾	31	99
Sweden	2012	7 000 ³⁾	0	72
Norway	2012	4 381	0	85
Iceland	2013	0	0	0
Faroe Islands	2013	0	12	0

	Year	Kiosks may apply for a licence to sell alcohol	Gas stations may apply for a licence to sell alcohol	Possibility to legally buy on the internet from abroad
Finland	2013	yes ²⁾	yes ²⁾	yes
Sweden	2013	yes ³⁾	yes ³⁾	yes
Norway	2013	no	no	yes ⁴⁾
Iceland	2013	no	no	yes
Faroe Islands	2013	no	no	no

- 1) In Finland farm winery shops and in Faroe Islands brewery outlets.
- 2) Only fermented alcoholic beverages with an alcohol content at most 4.7 % alcohol by volume.
- 3) Only beer with an alcohol content at most 3.5 % alcohol by volume.
- 4) Norwegian custom declaration is needed.



On-premise retail sale networks for alcoholic beverages

	Year	All drinks	Wine and beer only	Beer only	Total	Total per 100 000 inhabitants
Finland	2013	5 919	372	1937 ¹⁾	8 228	151
Sweden	2012	10 846	639	17 ²⁾	11 801 ³⁾	121
Norway	2012	6 272	935	50	7 257	141
Iceland	2013	na	na	na	768	242
Faroe Islands	2013	64	3	na	67	134

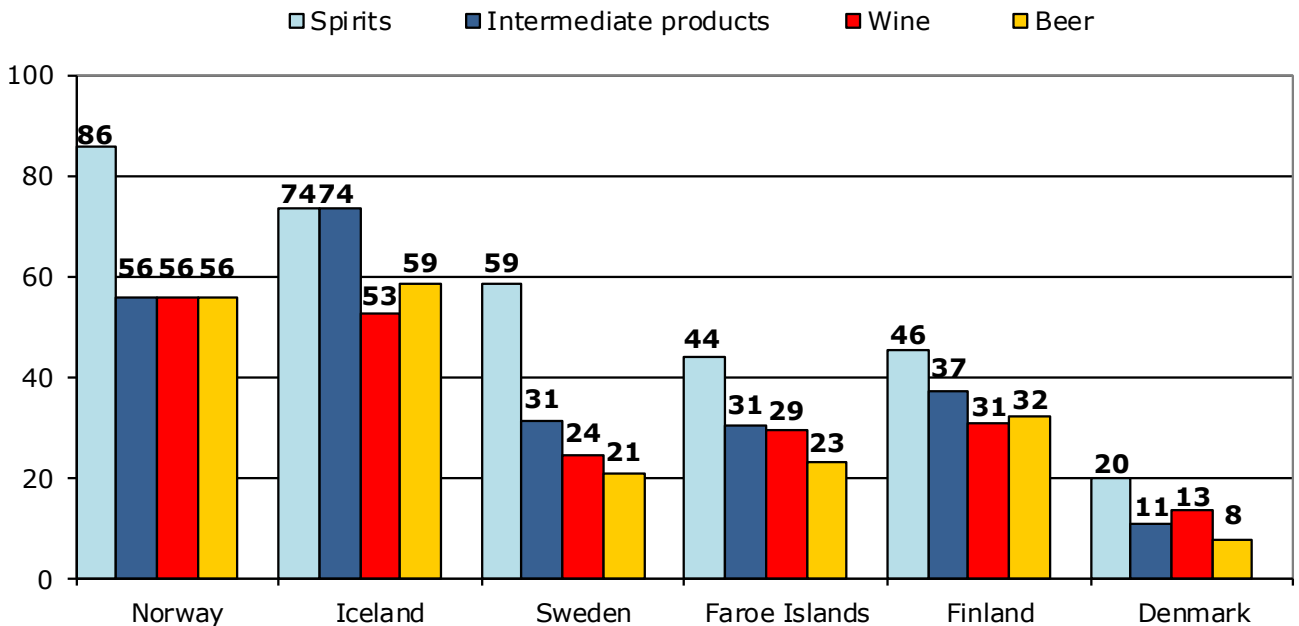
- 1) Beer only restaurants are allowed to sell only fermented alcoholic beverages at most 4.7 % alcohol by volume.
- 2) Beer only restaurants are allowed to sell only strong beer (beer with an alcohol content over 3.5 % alcohol by volume). Selling lower alcohol content beer takes place without a licence.
- 3) Includes also 176 traffic restaurants and 123 other restaurants (e.g.. serving in theaters or operas between the acts).



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

Euro per litre of 100 % alcohol

Situation as at 1st January 2014



	Spirits	Intermediate products ¹	Wine ¹	Beer	VAT, %	Surtax
Finland	45.5	37.2	30.8	32.0 ²⁾	24.0	yes
Sweden	58.7	31.1	24.3	20.6	25.0	no
Norway	85.8	55.8	55.8	55.8	25.0	yes
Denmark	20.1	10.10	13.4	7.5 ²⁾	25.0	yes
Iceland	73.5	73.5	52.8	58.7	25.5	yes
Faroe Islands	44.2	30.5	29.3	23.1 ³⁾	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) Excise duty of beer in Faroe Islands is calculated on the beer containing more than 4.6 % but less than 5.8 % ethyl alcohol by volume.



Alcohol excise duty rates in the EU member states and some other countries

Euro per litre of 100 % alcohol

Situation as at 1st January 2014

	Intermediate			
	Spirits	products	Wine	Beer
EU's minimum tax	6	3	0	2
Bulgaria	6	3	0	2
Croatia	7	6	1	5
Spain	9	3	0	2
Italy	9	4	0	7
Cyprus	10	3	0	6
Romania	10	9	0	2
Austria	10	4	0	5
Luxembourg	10	4	0	2
Slovakia	11	5	0	4
Czech Republic	11	5	0	3
Hungary	11	5	0	5
Slovenia	12	7	0	11
Portugal	13	4	0	4
Lithuania	13	5	5	2
Germany	13	9	0	2
Latvia	13	6	6	3
Poland	13	4	3	5
Malta	14	8	0	4
Estonia	16	10	8	6
The Netherlands	17	8	8	8
France	17	10	0	7
Denmark	20	11	13	8
Belgium	21	7	5	5
Switzerland *	24	12	0	4
Greece	26	6	0	7
UK	34	24	29	23
Ireland	43	34	39	23
Turkey *	43	60	13	27
Finland	46	37	31	32
Sweden	59	31	24	21
Iceland *	74	74	53	59
Norway *	86	56	56	56

* Non EU-country

Sources: Spirits Europe, European commission, ATVR, Rúsdrekkasölu



Pricing principles of the Nordic alcohol monopoly companies

Price concept and pricing coefficient

Situation as at 1st January 2014

	The basic price	Pricing coefficient ²⁾	Exceptions of pricing coefficient
Alko	The back door price (BDP) ¹⁾ (without taxes)	Spirits: 1.54 Other strong beverages: 1.48 Mild and fortified wine: 1.52 Long drinks: 1.79 Beers: 1.65	Lower pricing coefficient for more expensive beverages
Systembolaget	Purchase price without taxes	1.19	-
Vinmonopolet	Purchase price without taxes	1.22	Coefficient decreases when margin goes over 80 NOK. Maximum margin is 110 NOK. Minimum margin is 4 NOK.
ATVR	Purchase price with taxes	Alcohol content: under 22 % by volume: 1.18 over 22 % by volume: 1.12	-
Rúsdrekkasölu	Purchase price with taxes	Distilled spirits: 1.45 (+13.35 DKK per liter) Wines and intermediate products: 1.30 (+2.0 DKK per 0.7 liter products) 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.



Pricing principles of the Nordic alcohol monopoly companies

Minimum margin and rounding

Situation as at 1st January 2014

	Margins	Rounding in local currency
Alko	<p>Minimum margin: General: 1.25 €/litre (minim. 0.64 €/sales unit)</p> <p>Beers and long drinks: 0.78 €/litre (minim. 0.29 €/sales unit)</p>	<p>If price is under 20 euro: to the nearest 1 cent If price if over 20 euro: to the nearest 10 cent</p>
Systembolaget	<p>Fixed margin: Distilled spirits: 2.70 SEK/bottle Wines: 3.50 SEK/bottle Beers: 0.85 SEK/bottle Other beverages: 2.70 SEK/bottle Small packaging: -1.75 SEK/unit Boxes and cardboard packaging 0.75 SEK/unit Multipack, small units 1.75 SEK Alcohol free 0.00 SEK / bottle Alcohol-free products have a fixed margin per bottle similar to what alcoholic products in the same group have</p>	<p>Wines and spirits: to the nearest 1 SEK</p> <p>Beer, cider and alcohol-free products: to the nearest 10 öre</p>
Vinmonopolet	<p>Fixed margin: General: 7.80 NOK/litre</p>	<p>to the nearest 10 öre</p>
ATVR	<p>No fixed margin, no minimum margin.</p>	<p>to the nearest 1 ISK</p>
Rúsdrekkasølu	<p>No fixed margin, no minimum margin.</p>	<p>to the nearest 0.05 DKK</p>



Price examples in the Nordic alcohol monopoly companies

Pricelists 1st July 2014, price in euro

Product (0,7 / 0,75)	Alko	Systembolaget	Vinmonopolet	ATVR	Rús-drekka-sølu
Spirits					
Koskenkorva Viina	17,99	23,00	35,85	30,78	-
Absolut Vodka	22,80	27,86	39,06	32,63	34,73
Smirnoff Vodka	21,90	25,31	37,13	32,63	31,58
Gordon's London Dry Gin	26,90	27,63	40,98	33,25	34,33
Other strong beverages					
Hennessy Very Special	39,80	41,50	51,23	55,12	53,70
Renault Carte Noire Extra	61,90	63,46	69,16	-	68,05
Ballantine's Finest	28,90	31,09	45,46	36,94	37,54
Jim Beam	28,90	30,63	44,82	42,18	38,21
Red wine					
Baron de Ley Reserva	16,48	12,48	20,43	16,62	15,82
Mouton Cadet Rouge	12,50	14,91	19,07	13,54	14,75
Gato Negro Cabernet Sauvignon	7,28	6,82	11,64	9,23	-
Gato Negro Cabernet Sauvignon BIB	27,90	22,66	42,90	34,49	-
White wine					
J. P. Chenet Colombard-Chardonnay ¹⁾	7,73	7,98	12,80	10,46	8,51
Penfolds Koonunga Hill Chardonnay	10,99	10,29	16,64	-	-
Blue Nun	8,98	6,82	10,88	-	9,18
Viña Maipo Chardonnay, BIB ²⁾	26,70	19,53	39,70	35,10	-
Sparkling wine					
Carrington Vintage Brut	10,88	7,98	12,80	-	-
Veuve Clicquot Brut	49,10	46,12	51,23	46,79	54,10
Dom Perignon brut	153,50	150,15	138,71	-	151,79
Beer					
Medium beer, bottle 0,33 l	1,53	1,18	4,85	1,82	1,50
Strong beer, domestic product, bottle 0,33 l	1,82	1,03	4,09	2,06	1,83
Strong beer, domestic product, can 0,5 l	2,90	1,31	5,96	2,78	-
Imported beer, Leffe, bottle 0,33 l	3,73	2,27	5,61	2,89	2,68
RTD					
Bacardi Breezer Orange 0,275 l	3,47	2,30	-	2,70	3,49

1) Or J. P. Chenet Chardonnay or Medium Sweet

2) Or Vina Maipo Sauvignon Blanc BIB



Travelers' alcohol import quotas in litres

Situation as at 1st January 2014

Litres / Traveler	Spirits	Intermediate products and sparkling wines	Wines	Beer			
EU-MEMBERS							
Finland							
From EU countries	No quantitative quotas						
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 20 hours when arriving from non-EU or EEA countries, excluding air traffic.						
Sweden							
From EU countries	No quantitative quotas						
From non-EU countries	1	or	2	and	4	or	16
Time limit from non-EU countries	No time limits						
Denmark							
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						
NON-EU COUNTRIES							
Faroe Islands	1	and	1	and	0	and	0
	1	and	0	and	2	and	2
Time limits	No time limits						
Iceland	Alcohol content		Alcohol content < 22		Beer		
	1	and	1	and	0		
	1	and	0	and	6		
	0	and	3	and	0		
	0	and	1,5	and	6		
Time limits	No time limits						
Norway	Alcohol content 22 < % ≤ 60		Alcohol content 2.5 < % ≤ 22		Beer OR beverage with alcohol content 2.5 < % ≤ 4.7		
	1	and	1,5	and	2		
	0	and	3	and	2		
	0	and	0	and	5		
Time limits	Time limit of 24 hours for tax free import						



Travelers' alcohol imports

Alcoholic beverages imported by travelers, million litres

	Spirits	Wine ¹⁾	Beer	Cider and long drinks	Total in 100 % alcohol
Finland					
2007	9,0	8,0	21,8	14,2	7,0
2008	9,6	9,4	20,7	12,0	7,3
2009	9,4	10,5	26,3	16,4	7,9
2010	8,9	9,1	24,4	19,7	7,9
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
Sweden					
2007	21,2	23,5	54,4	1,9	14,0
2008	21,2	22,9	64,3	4,7	14,7
2009	15,4	17,5	45,5	2,2	10,6
2010	17,2	15,6	40,5	1,8	10,8
2011	16,2	19,2	42,2	4,2	11,2
2012	14,7	17,7	38,2	1,7	10,1
2013	19,0	20,3	53,2	2,4	12,9
Norway					
2007	4,4	8,6	7,9	-	3,2
Denmark					
2007	2,0	12,0	65,0	0,0	5,0
2008	2,0	12,0	65,0	0,0	5,0
2009	2,0	14,0	70,0	0,0	5,0
2010	2,0	14,0	70,0	0,0	5,0

1) Wines include fortified wines.

Alcoholic beverages imported by travelers,
total in 100% alcohol

	Year	Million litres	Litres per capita	Litres per capita 15 years and older
Finland	2013	8,9	1,6	1,9
Sweden	2013	12,9	1,3	1,6
Norway	2007	3,2	0,7	0,8
Denmark	2010	5,0	0,9	1,1



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	2013	9,1	2,5	11,6	22
Sweden	2013	7,4	2,5	9,9	25
Norway²	2013	6,2	1,6	7,8	21
Denmark^{1,2}	2013	9,4	1,1	10,5	10
Iceland	2013	6,9	0,7	7,6	9
Faroe Islands	2013	6,3	0,7	7,0	10

Per capita, 100 % alcohol

	Year	Recorded consumption, litres per capita	Unrecorded consumption, litres per capita	Total consumption, litres per capita	Proportion of unrecorded consumption of total consumption, %
Finland	2013	7,6	2,1	9,7	22
Sweden	2013	6,1	2,1	8,2	25
Norway²	2013	5,1	1,3	6,4	21
Denmark^{1,2}	2013	7,8	0,9	8,8	10
Iceland	2013	5,6	0,5	6,1	8
Faroe Islands	2013	5,0	0,6	5,6	10

1) Alcohol imported by Danes minus alcohol bought by foreigners in Denmark

2) Unrecorded consumption in 2012 is estimated on the basis of figures for earlier years

Recorded consumption of alcoholic beverages

Retail sale of alcoholic beverages plus domestic serving of alcoholic beverages.

Unrecorded alcohol consumption:

Alcoholic beverages imported by travellers minus exported by foreign travellers, home brewed and fermented alcoholic beverages and illegal moonshining, smuggling, substitutes of alcohol. In Finland also alcohol consumed by Finnish tourists abroad is included in unrecorded alcohol consumption.

Total consumption of alcoholic beverages:

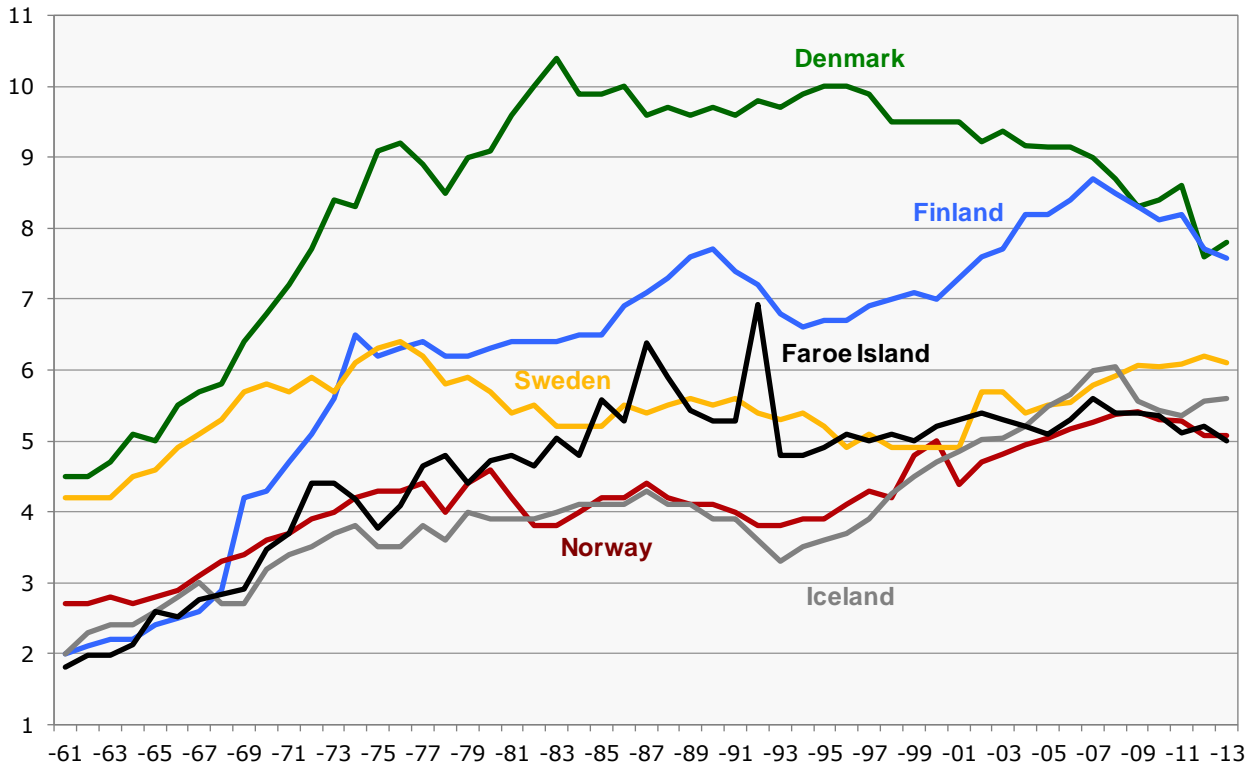
The sum of recorded and unrecorded alcohol consumption.



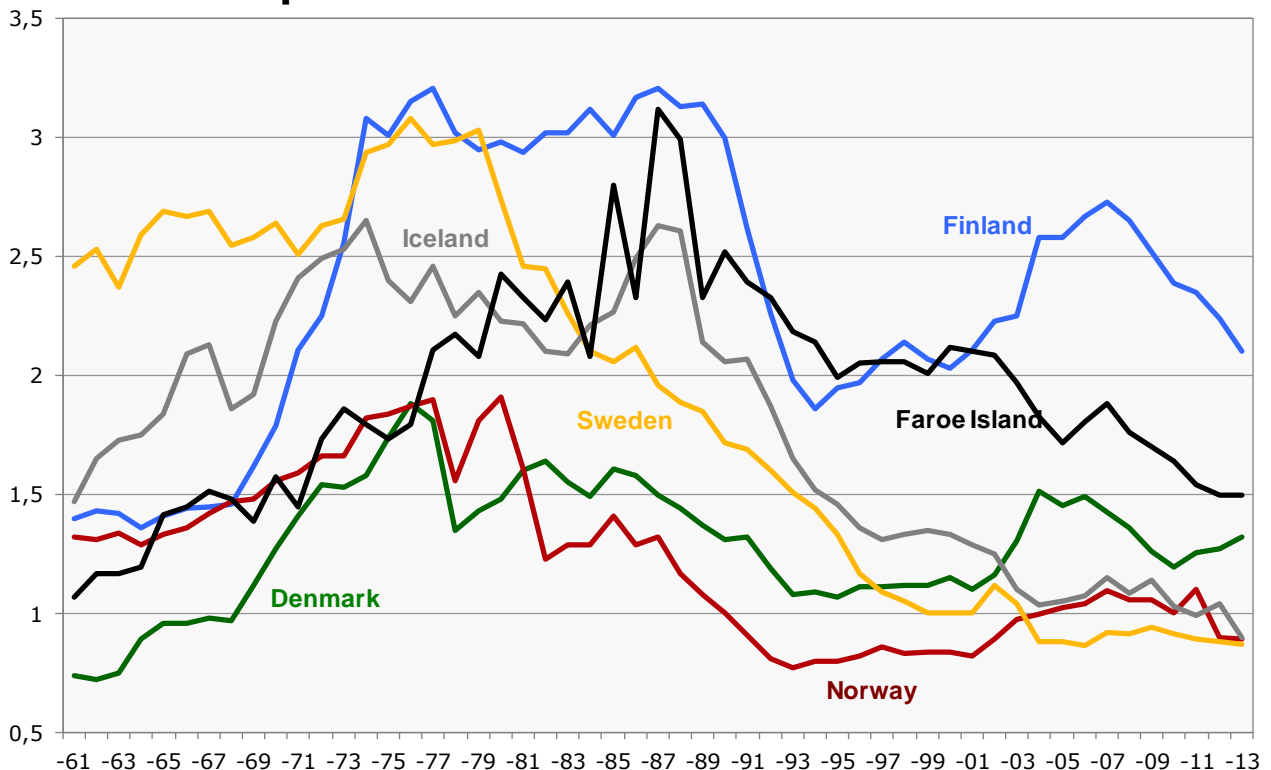
Recorded alcohol consumption in the Nordic countries in 1961-2013

Litres of 100 % alcohol per capita

Total



Distilled spirits



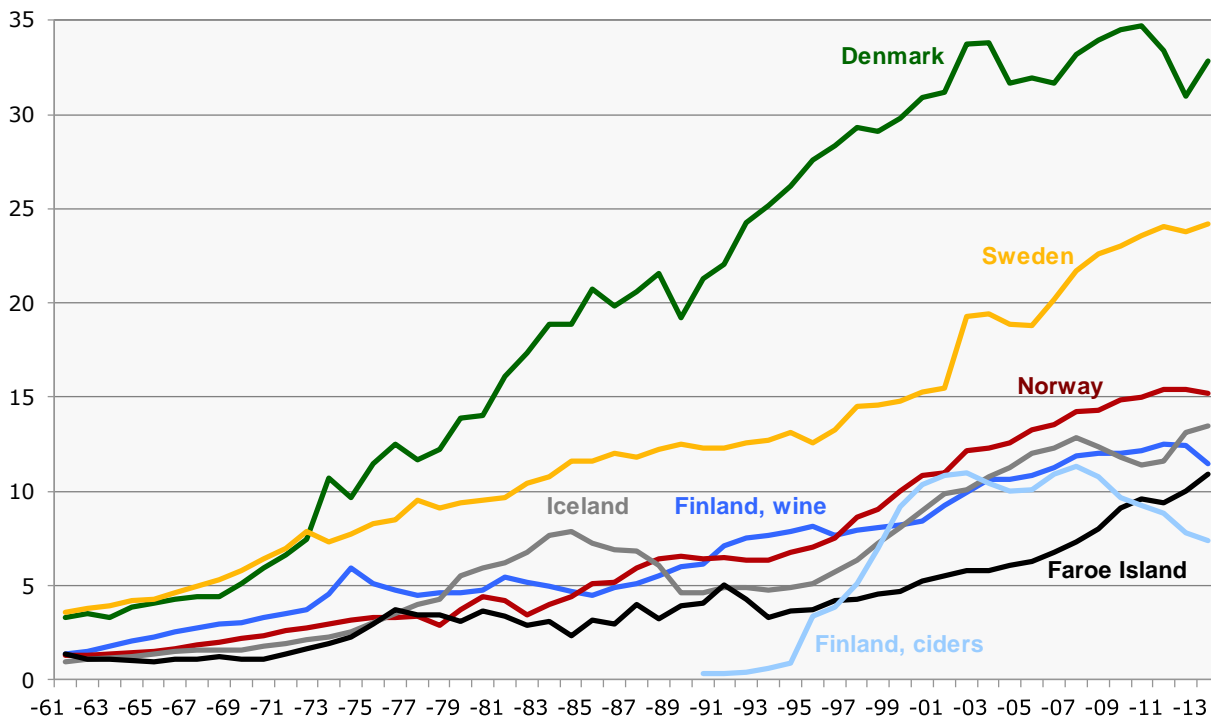
Sources: ATVR, Rúsdrekkasölu, SoRAD, Statistics Denmark, Statistics Iceland, Statistics Norway, THL, Valvira, World Drink Trends 2005



Recorded alcohol consumption in the Nordic countries in 1961-2013

Volume litres per capita

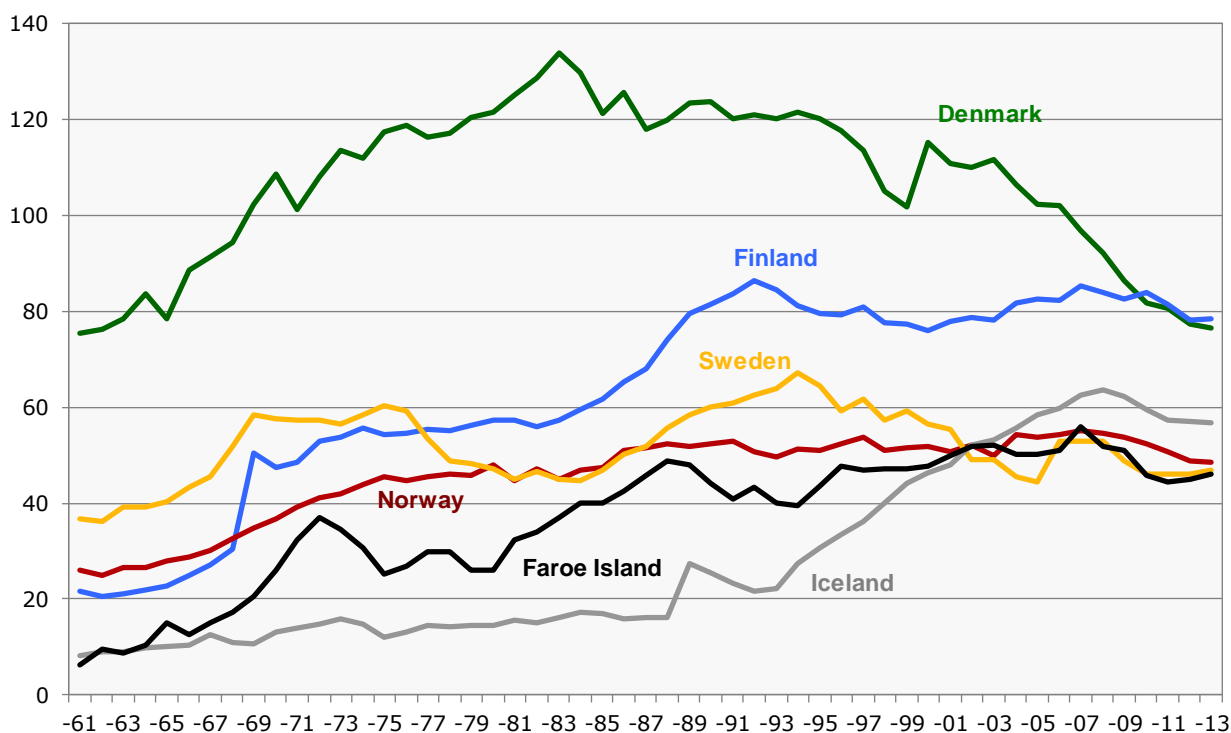
Wines (includes fortified wines)



Finland: Ciders are included in wines before the year 1995.

Sweden: Wines include strong cider and alcoholic lemonades (RTD).

Beer





Public opinion on alcohol policy

Finland:

- According to a survey conducted by TNS Gallup in January 2014 with 1001 interviews
 - 53 per cent of population supported prevailing alcohol policy and 17 per cent wanted stricter policies.
 - 92 per cent of respondents agreed that strong alcohol beverages should be sold only in Alko. Corresponding figure for wine was 57 per cent and for strong beer 57 per cent. 85 per cent of respondents supported that beer at most 4.7 per cent alcohol by volume should be available also in grocery stores.
 - 65¹ per cent of respondents agreed that Alko and its sole right to off-premise retail sale of alcoholic beverages is a good way of controlling the extent of the harmful effects of alcohol.

Sweden:

- According to monthly surveys conducted in January – December 2013 by SIFO Research International
 - 72² per cent of the respondents agreed that Systembolaget and its monopoly on the off-premise retail sale of strong beer, wines and spirits should be retained.

Norway:

- According to a survey conducted in 2013
 - 89 per cent of respondents were satisfied or very satisfied with Vinmonopolet.
 - 60³ per cent of respondents agreed that Vinmonopolet should have the sole right for off-premise retail sale of strong beer, wine and distilled spirits.

Iceland:

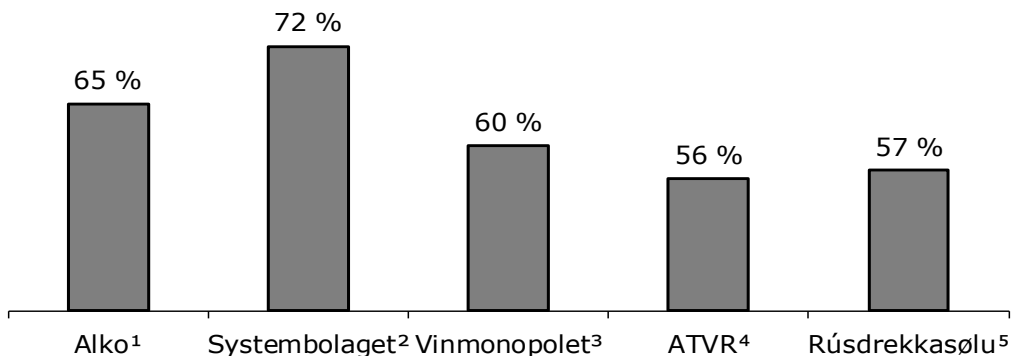
- According to survey conducted in May 2013 56⁴ per cent of the respondents supported the present alcohol monopoly arrangement.
- In the latest public opinion poll conducted in June 2013 three questions of opinions on Icelandic alcohol policy were asked.
 - 56 per cent were satisfied with the current system of alcohol sales in Iceland.
 - 48 per cent were for the sale of beer and wine in other stores than special alcohol stores as well.
 - 22 per cent were for the sale of strong distilled spirits in other stores than special alcohol stores.

Faroe Islands:

- According to survey conducted in November 2013 by Gallup
 - 57⁵ per cent of respondents supported the alcohol policy.

Monopoly support in 2013

*Surveys not comparable between monopolies



Superscripts 1...5 indicate the question in the particular survey above



Customer satisfaction rates in the Nordic alcohol monopoly companies

Alko:

- In 2013 the performance index for customer retention for Alko was 60/100.

Systembolaget:

- For the year 2013 customer satisfaction index for Systembolaget was 82 per cent (scale 1-100).

Vinmonopolet:

- According to Norwegian customer satisfaction barometer 89 per cent of customers were satisfied or very satisfied with Vinmonopolet in 2013. Service, quality and availability are Vinmonopolet's most valued traits among the public.

ATVR:

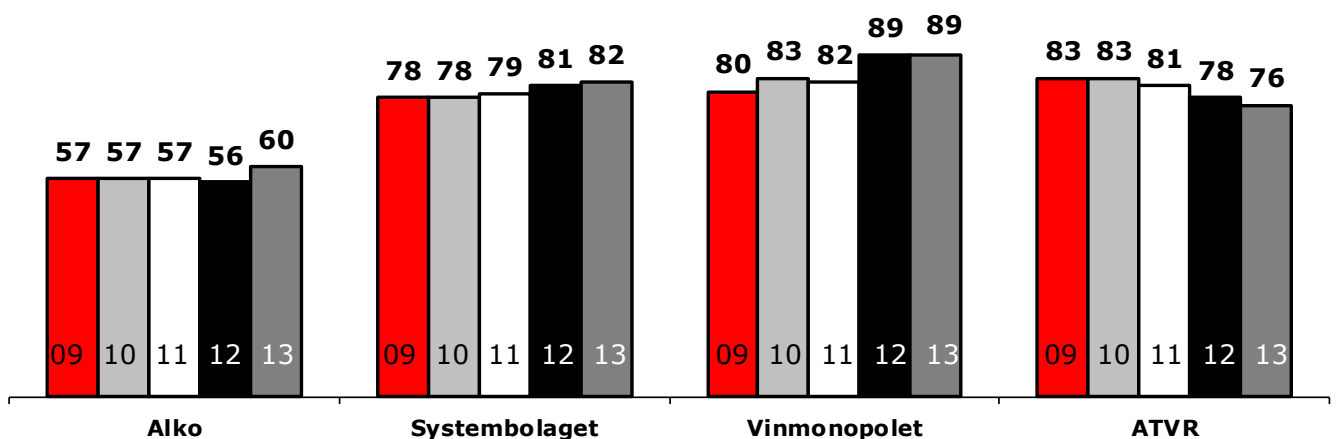
- In the latest public opinion poll conducted in June 2013 answers to the question are you satisfied or unsatisfied with the current system of alcohol monopoly in Iceland gave 74,1 percent (scale 1-100 %).

Rúsdrekkasølu:

- In November 2013 49 per cent of the respondents supported the alcohol monopoly arrangement. They were either very satisfied or satisfied with the Faroese alcohol monopoly Rúsdrekkasølu Landsins.

Development in customer satisfaction rates 2009–2013

*Surveys not totally comparable between monopolies





Personnel and beverage brands

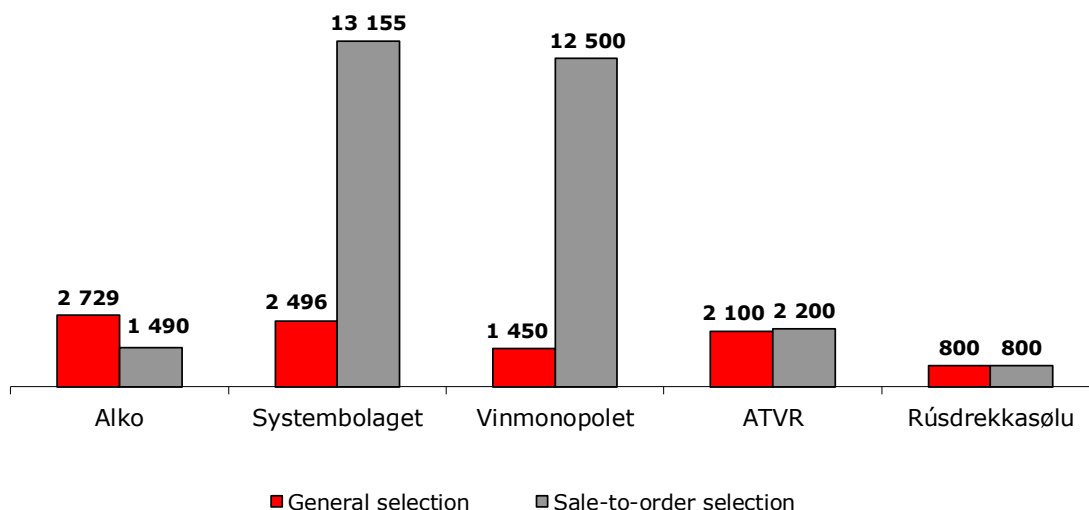
Situation as at 1st January 2014

Personnel

Alko	2 705
Systembolaget	5 087
Vinmonopolet	1 139
ATVR	430
Rúsdrekkasølu	37

Beverage brands

	General selection	Sale-to-order selection
Alko	2 729	1 490
Systembolaget	2 496	13 155
Vinmonopolet	1 450	12 500
ATVR	2 100	2 200
Rúsdrekkasølu	800	800



Sources: Nordic alcohol monopoly companies



Packaging 2013

Wine

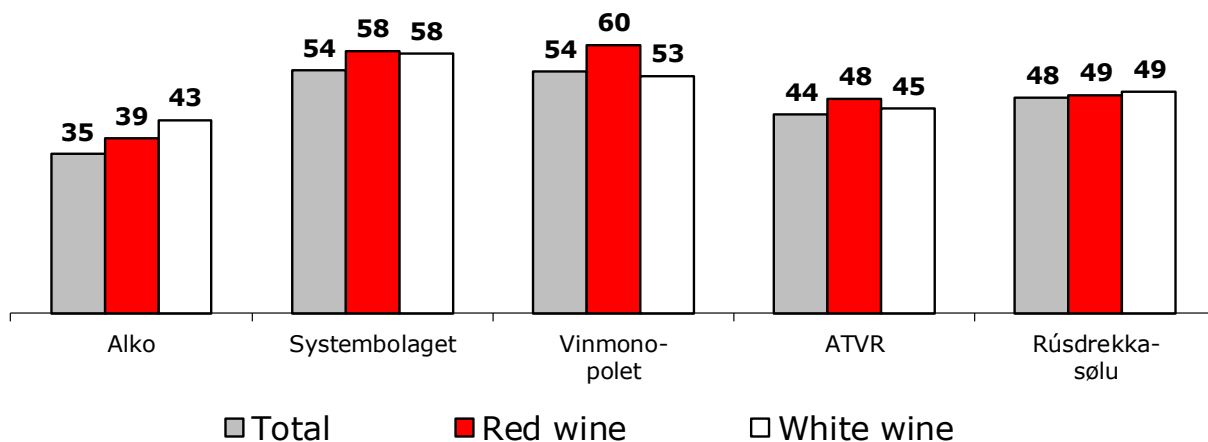
	Share of BIB of total wine sales, %	Share of red wine sold in BIB, %	Share of white wine sold in BIB, %
Alko	35	39	43
Systembolaget	54	58	58
Vinmonopolet	54	60	53
ATVR	44	48	45
Rúsdrekkasølu	48	49	49

	Share of wine sold in PET-bottles, %	Share of wine sold in tetra packs
Alko	3,3	5,0
Systembolaget	1,2	6,8
Vinmonopolet	0,3	0,3
ATVR	-	1,6
Rúsdrekkasølu	-	3,8

Beer

	Beer sold in cans, %	Beer sold in multipacks, %
Alko	60	45
Systembolaget	74	0
Vinmonopolet	9	-
ATVR	89	-
Rúsdrekkasølu	50	80

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





Total sales in 2013

Litres

	Million litres	Million litres excl. beer	Million litres of 100 % alcohol
Alko	99,2	90,2	16,8
Systembolaget	468,3	236,8	46,4
Vinmonopolet	80,4	78,6	12,6
ATVR	18,7	4,2	1,4
Rúsdrekkasølu ¹⁾	2,9	0,7	0,2

Change from previous year, %

	Litres	Litres excl. beer	Litres of 100 % alcohol
Alko	-2,9	-2,9	-3,7
Systembolaget	1,4	1,1	1,0
Vinmonopolet	1,0	0,2	0,0
ATVR	0,6	2,6	0,3
Rúsdrekkasølu ¹⁾	-4,4	1,1	-3,5

Litres per capita

	Litres	Litres excl. beer	Litres of 100 % alcohol
Alko	18,2	16,5	3,1
Systembolaget	48,2	24,4	4,8
Vinmonopolet	15,6	15,3	2,5
ATVR	58,8	13,2	4,3
Rúsdrekkasølu ¹⁾	57,3	14,6	4,8

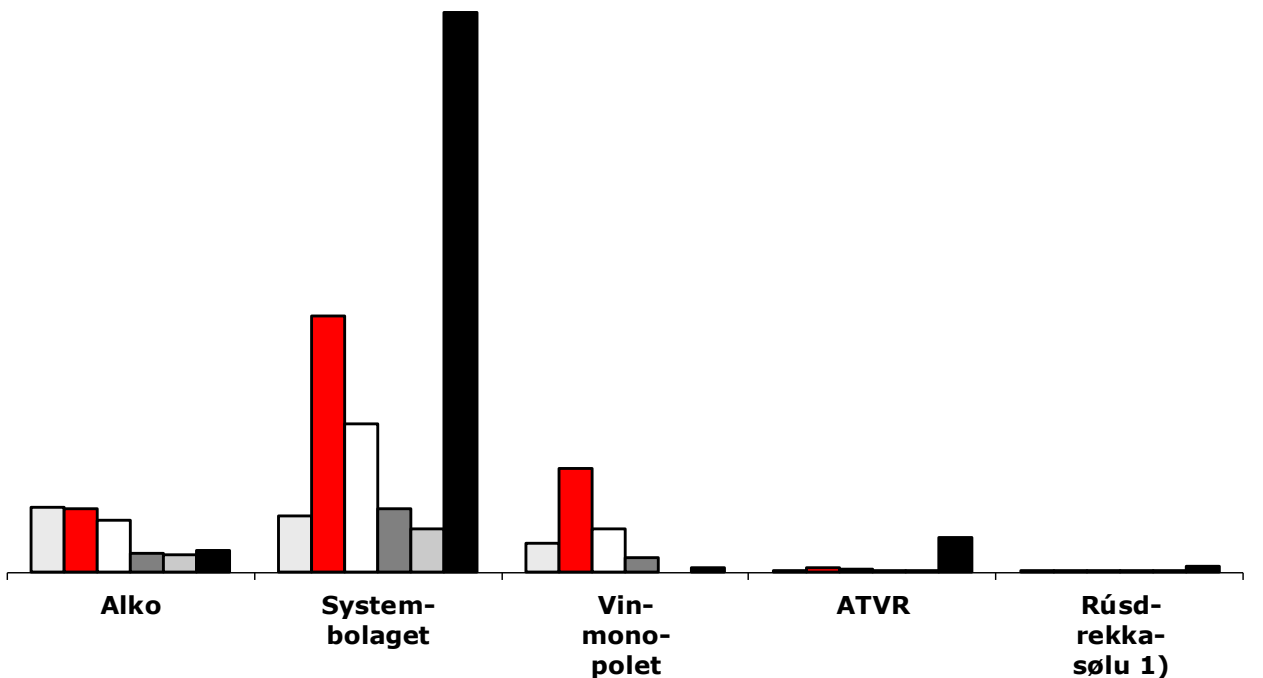
1) Sales figures of Rúsdrekkasølu include sales of brewery outlets.



Sales by product groups in 2013

Million litres

	Alko	System- bolaget	Vin- mono- polet	ATVR	Rúsd- rekka- sølu ¹⁾
Spirits	15,2	6,1	11,5	0,5	0,2
Other strong alcoholic beverages	8,4	12,8	0,0	0,1	0,0
Fortified wines	3,5	4,4	0,6	0,0	0,0
Red wines	26,4	106,0	42,9	1,8	0,2
White wines	21,7	61,4	17,6	1,2	0,1
Sparkling wines	4,8	10,0	3,7	0,1	0,0
Rosé wines	0,8	14,1	1,9	0,1	0,0
Other wines	2,1	2,0	0,1	0,0	0,0
Ciders	0,9	11,4	0,0	0,3	0,1
RTD (Long drinks)	6,5	6,2	0,0	0,1	0,0
Beers	9,1	231,4	1,8	14,5	2,1
Non-alcoholic products	0,2	2,4	0,3	0,0	0,0
Total	99,2	468,3	80,4	18,7	2,9



□ Strong beverages ■ Red wine □ White wine ■ Other wine □ Cider and RTD ■ Beer

1) Rúsdrekkasølu sales include sales by brewery outlets.

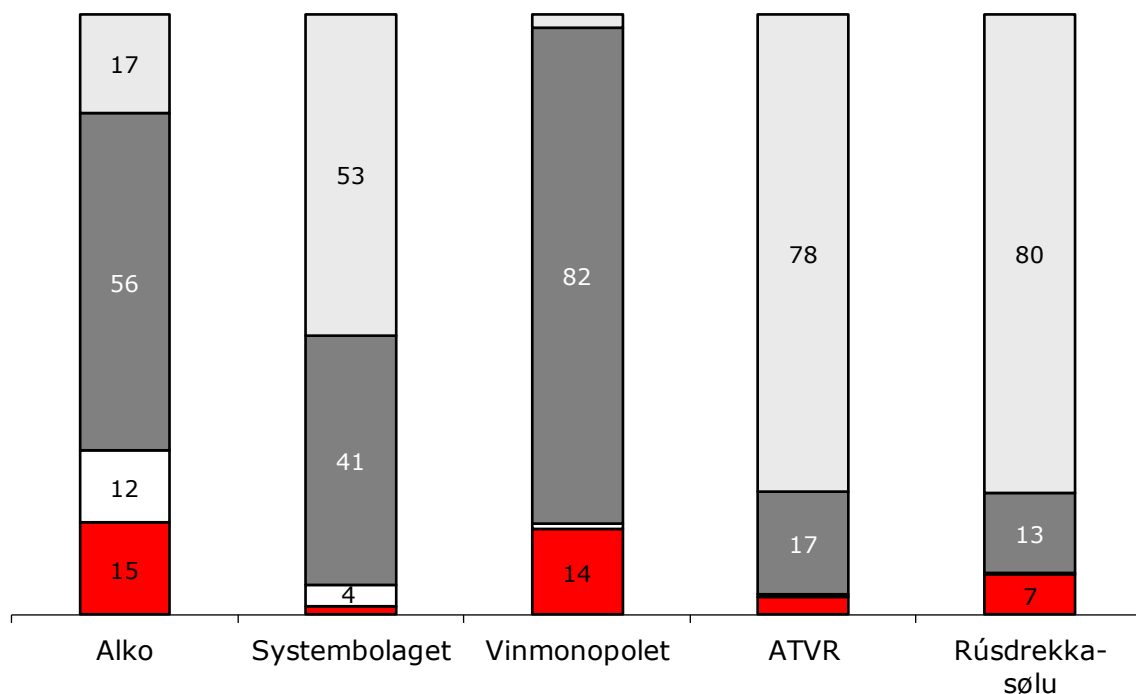
Sources: Nordic alcohol monopoly companies



Structure of sales by product groups in 2013

Share of litres in percentages

	Alko	Systembolaget	Vinmonopolet	ATVR	Rúsdrekka-sølu ¹⁾
Spirits	15,3	1,3	14,3	2,8	6,7
Other strong alcoholic beverages	8,4	2,7	0,0	0,3	0,0
Fortified wines	3,5	0,9	0,8	0,2	0,3
Red wines	26,6	22,6	53,3	9,7	8,1
White wines	21,8	13,1	22,0	6,2	4,5
Sparkling wines	4,8	2,1	4,6	0,6	0,4
Rosé wines	0,8	3,0	2,4	0,3	0,4
Other wines	2,1	0,4	0,2	0,1	0,0
Ciders	0,9	2,4	0,0	0,0	5,1
RTD (Long drinks)	6,5	1,3	0,0	0,7	0,0
Beers	9,1	49,4	2,2	77,6	74,5
Non-alcoholic products	0,2	0,5	0,3	0,0	0,0
Total	100,0	100,0	100,0	100,0	100,0



■ Spirits □ Other strong beverages ■ Wine □ Beer, cider and RTD

1) Rúsdrekka-sølu sales include sales by brewery outlets.

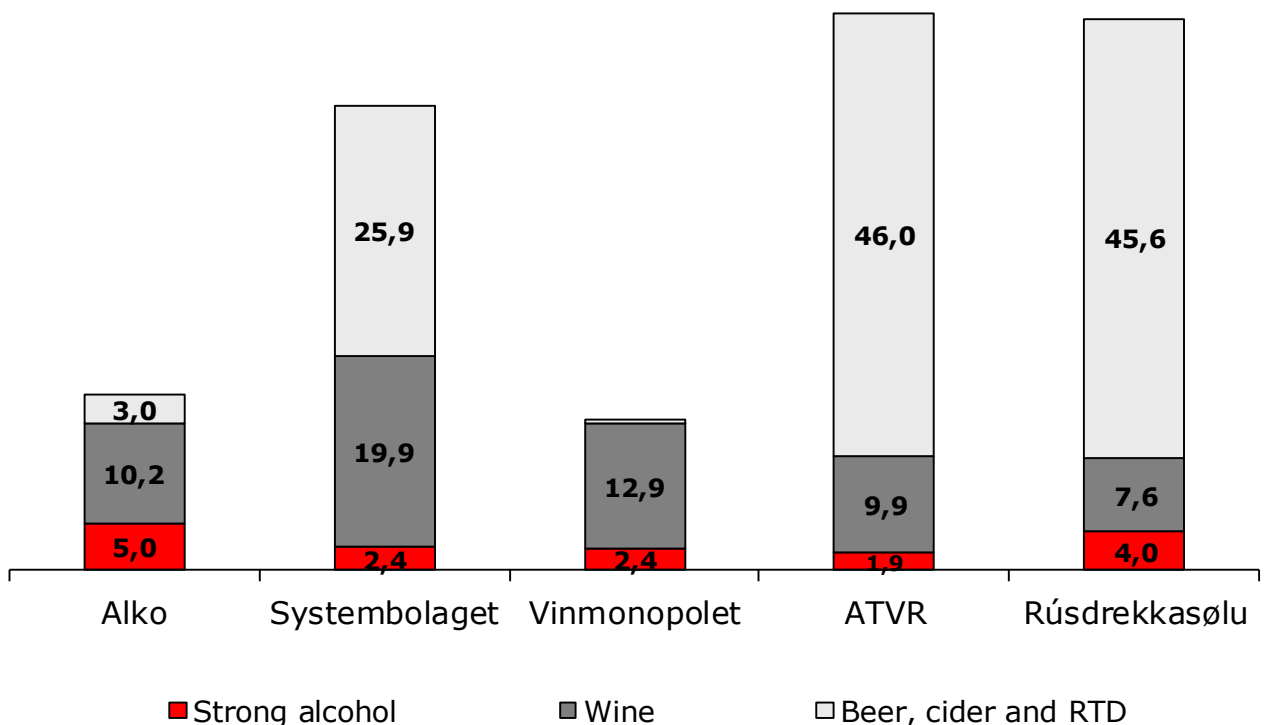
Sources: Nordic alcohol monopoly companies



Structure of sales by product groups in 2013 (continues)

Litres per capita

	Alko	Systembolaget	Vinmonopolet	ATVR	Rúsdrekkasølu ¹⁾
Spirits	2,8	0,6	2,2	1,6	3,8
Other strong alcoholic beverages	1,5	1,3	0,0	0,2	0,0
Fortified wines	0,6	0,5	0,1	0,1	0,2
Red wines	4,8	10,9	8,3	5,7	4,6
White wines	4,0	6,3	3,4	3,6	2,6
Sparkling wines	0,9	1,0	0,7	0,3	0,2
Rosé wines	0,1	1,5	0,4	0,2	0,2
Other wines	0,4	0,2	0,0	0,0	0,0
Ciders	0,2	1,2	0,0	0,0	2,9
RTD (Long drinks)	1,2	0,6	0,0	0,4	0,0
Beers	1,7	23,8	0,3	45,6	42,7
Non-alcoholic products	0,0	0,2	0,1	0,0	0,0
Total	18,2	48,2	15,6	58,8	57,3



1) Rúsdrekkasølu sales include sales by brewery outlets.

Sources: Nordic alcohol monopoly companies



Wine sales in 2013

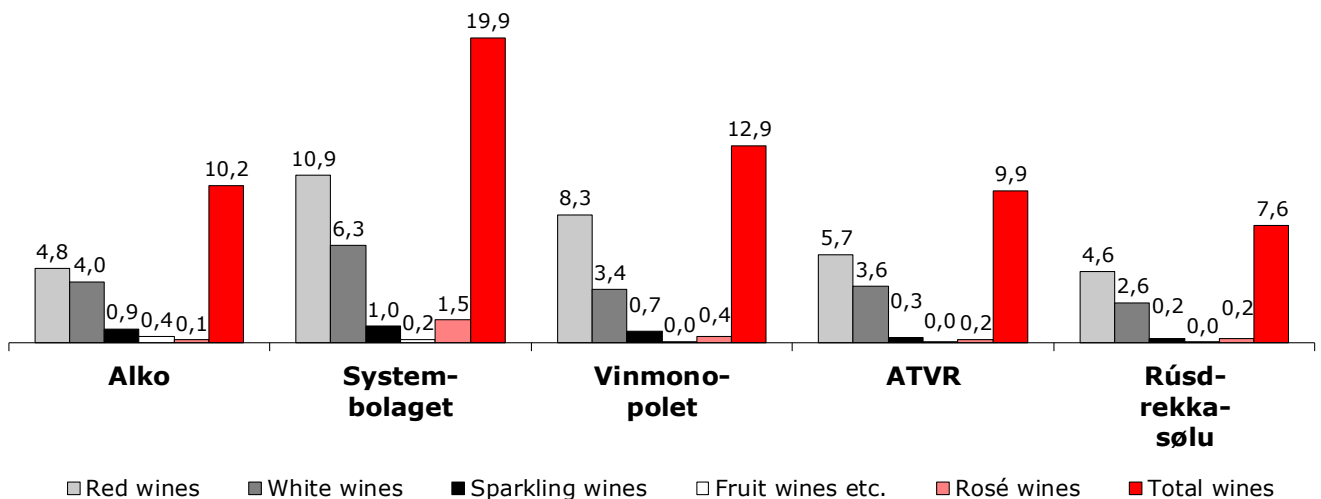
Million litres

	Alko	Systembolaget	Vinmonopolet	ATVR	Rúsdrekka-sölu
Red wines	26,4	106,0	42,9	1,8	0,2
White wines	21,7	61,4	17,6	1,2	0,1
Sparkling wines	4,8	10,0	3,7	0,1	0,0
Rosé wines	0,8	14,1	1,9	0,1	0,0
Fruit wines etc.	2,1	2,0	0,1	0,0	0,0
Total wines	55,6	193,5	66,2	3,1	0,4

Litres per capita

	Alko	Systembolaget	Vinmonopolet	ATVR	Rúsdrekka-sölu
Red wines	4,8	10,9	8,3	5,7	4,6
White wines	4,0	6,3	3,4	3,6	2,6
Sparkling wines	0,9	1,0	0,7	0,3	0,2
Rosé wines	0,1	1,5	0,4	0,2	0,2
Fruit wines etc.	0,4	0,2	0,0	0,0	0,0
Total wines	10,2	19,9	12,9	9,9	7,6

Litres per capita





Social Control

Sales supervision in alcohol monopoly companies in 2013

Checks for	Alko	Vinmonopolet	ATVR	Rúsdrekka- sølu
- age limit	3 582 230	1 200 000	194 620	2 000
- denied because of age limit	na	6 907	na	100
- customer shows ID spontaneous	na	2 000 000	na	2 500
- suspected intoxication	607 542	4 792 ¹⁾	na	40
- suspected handover	241 267	1 207 ¹⁾	na	25

1) Denied because of suspected intoxication or suspected handover.

Age limit checks in Mystery –surveys 2008-2013

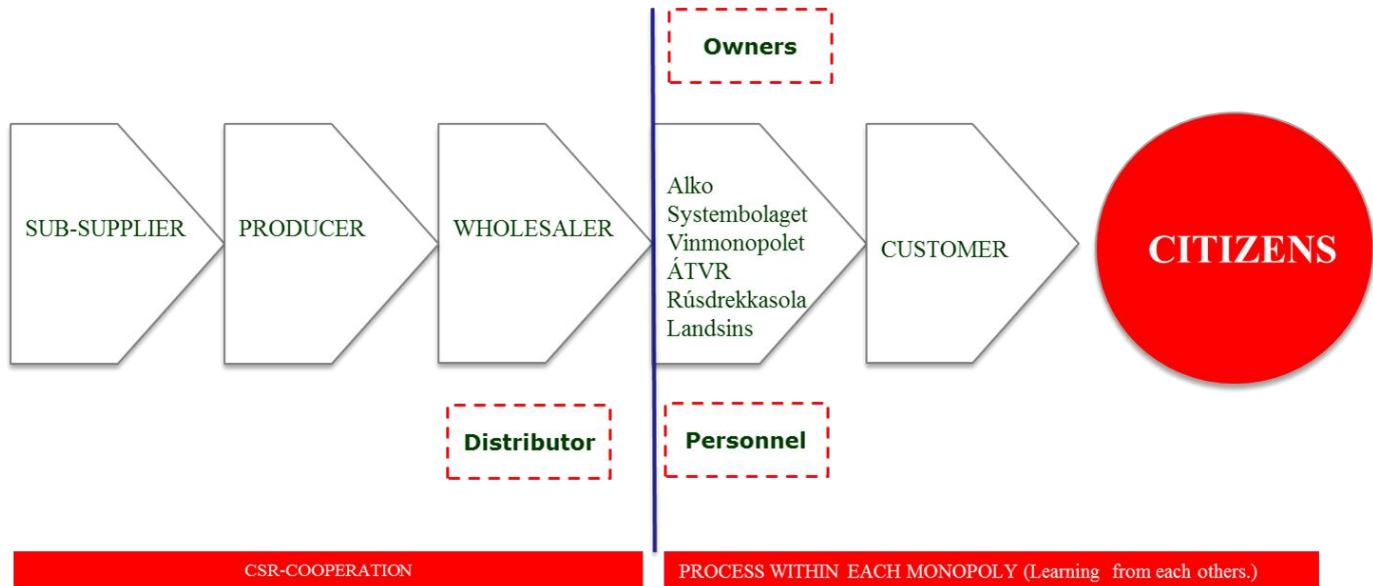
Share of age-limit checks conducted in monopoly stores, %

	Alko	Systembolaget	Vinmonopolet	ATVR	Rúsdrekka- sølu
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



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 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 recognize 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 recognize 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 National Institute for Health and Welfare, THL National Supervisory Authority for Welfare and Health, Valvira Nordic Centre for Welfare and Social Issues Finnish alcohol legislation Statistics Finland	www.alko.fi www.thl.fi www.valvira.fi www.nordicwelfare.org www.finlex.fi www.tilastokeskus.fi
Sweden:	Alcohol monopoly of Sweden, Systembolaget Centre for Social Research on Alcohol and Drugs,(SoRAD) Public Health Agency of Sweden (Folkhälsomyndigheten) Statistical Office of Sweden Riksdagen includes the alcohol laws of Sweden	www.systembolaget.se www.sorad.su.se www.folkhalsomyndigheten.se www.scb.se www.riksdagen.se
Norway:	Alcohol monopoly of Norway, Vinmonopolet Norwegian Institute for Alcohol and Drug Research (SIRUS) Statistical Office of Norway	www.vinmonopolet.no www.sirus.no www.ssb.no
Denmark:	Statistics Denmark Finansministeriet Skatteministeriet	www.dst.dk www.fm.dk www.skm.dk
Iceland:	Alcohol monopoly of Iceland, ATVR Statistics Iceland	www.atvr.is www.statice.is
Faroe Islands:	Alcohol monopoly of Faroe Islands, Rúsdrekkasølu Statistics Faroe Islands	www.rusan.fo www.hagstova.fo
Other:	Eurostat Omvärldsbevakning om alkoholrelaterade nyheter Eurocare WHO, Global Information System on Alcohol and Health	www.epp.eurostat.ec www.nosam.net www.eurocare.org www.who.int/gho/alcohol/en

