

Estonia

Written by Mr. Lauri Beekmann, April 2005

1. The country

- 1905 Poor peasants vent their anger at Czarist police and Baltic Germans, who own more than half the land in Estonia.
- 1918 Estonians had been pushing mainly for greater autonomy within what they hoped would be a democratically-oriented Russian Empire. But after Soviet Russia's heavy-handedness, they declare independence. Estonian forces beat back German and Soviet militaries. They're aided at critical points by Great Britain.
- 1920 Against all odds, Estonia wins independence. Amid post-war economic misery and destruction, land is taken from German nobility and redistributed to the poor.
- 1935 Estonia becomes increasingly frantic about the threat from Soviet Russia to the east and Nazi Germany to the west. In the meantime, Estonia prospers, with GDP reaching or surpassing Nordic levels.
- 1939 Hitler and Stalin carve up Europe, with the Baltics said to be the Soviet sphere. Before, the Baltics were able to play Germany and Russia off each other, but they're now virtually within the clutches of Russia—with Germany's acquiescence.
- 1940 As Germany invades France, the U.S.S.R. grabs Estonia.
- 1941 June 14 First mass deportations by Stalinist forces, targeting the cream of society. Others dragged out of detention cells and shot.
- 1941 Germany occupies Estonia. Most of some 4,000 Estonian Jews flee to Russia, though some 1000 who do not are killed. According to German plans, Estonia would be repopulated with Germans and converted into a new Third Reich state stretching as far as Petersburg.
- 1944 Soviet occupation again; thousands flee West, others head to the forests to resist. Some anti-Soviet forest partisans engage Soviet troops in battle.
- 1949 More mass deportations to Siberia.
- 1970s The beginning of the Stagnation Era under Soviet leader Leonid Brezhnev; rampant shortages and rule by jowly, gray-faced men. It was, says historian Anatol Lieven, an era of "faceless bureaucrats playing an endless game of musical chairs," moving from the directorship of one department or factory to another.
- 1987 First open protests against Soviet rule.
- 1988 Estonian Soviet legislature declares sovereignty. The independence drive begins in earnest; it's dubbed the Singing Revolution because rallies are peaceful and usually accompanied by singing.
- 1990 Soviet Estonian legislature declares a transition to independence.
- 1991 In January, Soviets crackdown on Baltics.
- August 1991 A coup in the Kremlin unravels as quickly as it began. Two days before, it looked like the absolute worst was about to happen. But suddenly, with Moscow's authority having collapsed, the impossible dream of restoring independence comes true literally overnight.
- March 29, 2004 Estonia is accepted into NATO. It's the first time in its history to join a military alliance voluntarily.
- May 1, 2004 Estonia joins the European Union.

- Estonia's population ranks amongst the smallest in the world: as of January 2000, an estimated 1 361 242 people live in Estonia — a density of only 30.2 people per sq. km.
- Throughout centuries, Estonians have always lived in the corner of the world where there is a large-scale migration of peoples. The Estonian language contains loan words from Low German, German, Swedish, Russian, French, Finnish and English. Those travelling through or those who have come here by chance have doubtlessly left their mark on the Estonians' way of thinking and their character. Despite the high level of urbanisation (about $\frac{3}{4}$ of the population live in towns), Estonians are connected quite closely with rural life. On the whole, not eager to display great joy or sadness, Estonians are economical with their feelings. The only place one can see an Estonian roaring with laughter is in a pub.
- Ethnic groups: Estonian 65.3%, Russian 28.1%, Ukrainian 2.5%, Belarusian 1.5%, Finn 1%, other 1.6%.
- Religion: Evangelical Lutheran, Russian Orthodox, Estonian Orthodox, Baptist, Methodist, Seventh-Day Adventist, Roman Catholic, Pentecostal, Word of Life, Jewish.
- Language: Estonian (official), Russian, Ukrainian, Finnish. The Estonian language contains loan words from Low German, German, Swedish, Russian, French, Finnish and English.

Estonia is able to meet its own need for electricity, and even to export a surplus. Oil shale is excavated in the northeast and used in local power stations. Alternative energy sources like wind, water and peat have been thoroughly investigated in recent years. Peat is one of the most important natural resources in Estonia, and, moreover, is renewable. Since the country is not rich in mineral resources, its economy is primarily based on light industry and the service sector, i.e. tourism, trade and banking. Estonia is situated on a busy trading route between East and West and has always had excellent ports; foreign trade and transit are therefore ever increasingly important to the Estonian economy. After the restoration of independence, the share of the financial sector grew considerably and stabilised. Estonian currency, the kroon, is pegged to the German Mark at the rate 1 DEM=8 kroons (1 Euro = 15.6466 EEK). Today, foreign investors are involved in approximately 90 per cent of the Estonian banking sector. In recent years, there has been a leap in information technology as well.

The most influential industrial areas are: the capital Tallinn, its surrounding areas, and Northeast Estonia. Major employers are the paper, timber and textile industries. One tenth of the population receives its income from agriculture, fishery or forestry. The changing world compels people to find other ways to earn a living besides traditional cattle breeding and grain growing. Cultivating oilseed rape, growing strawberries, or keeping a farmhouse for tourists are some of the alternative occupations.

Estonia exports various products: appliances of all kinds, electronic devices and components, and motor vehicle safety equipment. Small and medium-sized businesses predominate.

Alcohol industry is a growing field. The beer market on 2004 was more than 10 percent bigger than in 2003. Saku Brewery sold last year 68,1 million litres of drinks (not all alcohol), which is 1/5 more than the year before. One of the biggest spirits manufacturer Liviko produced last year 11 million litres, which was 3 million litres more than in year 2003.

Retail sales of alcohol to foreign tourists increased 2.2 times in Estonia last year, data by the Institute of Economic Research show. In terms of quantity, sale of beer doubled, sale of strong alcohol grew 2.1 times and sale of wine increased 1.5 times. All told, the roughly four million tourists who visited this Baltic state last year bought four million litres of 100 percent alcohol. Sale

in stores accounted for 2.6 million and sale on ships, for 1.4 million litres. Per-capita sales averaged three litres of vodka, 1.1 litres of brandy, 1.3 litres of liqueurs and 21.6 litres of beer.

The contemporary Estonian government follows the principles of separation of power and its people elect a 101-member parliament every four years. Only Estonian citizens may participate in parliamentary elections. The Parliament chooses a president, who can be in office for a five year period for a maximum of two terms. The President is the Supreme Commander of the National Defence of Estonia. A party must gather 5% of the votes in order to become part of the Parliament. As a rule, the President asks the party leader who has collected the most votes to form the new government. The representational model based on party politics has strengthened over the last decade. In the years shortly following the restoration of independence, there were dozens of parties to represent a population of only 1.3 million; at present 6–7 parties have remained. The local authorities have developed in the same direction. All permanent residents of voting age (18) may participate in local elections. Estonia does not have a state church, religious freedom is guaranteed by the constitution.

Box 1.1 Basic facts
Total area:45,226km ²
Number of inhabitants:1,3millions
Population density:30,2inhabitants/km ²
Capital city (name, population):Tallinn
Official language(s):Estonian
GDP per capita:€ 4 500 = 19.5% of the EU-15 average
In purchasing power standards: € 7 700 = 34% of the EU-15 average

Sources: CIA World Factbook, 2004 (<http://www.cia.gov/cia/publications/factbook/>)

Österberg & Karlsson, 2002 (<http://www.stakes.fi/verkkojulk/pdf/AlcoholPoliciesInEUetc.pdf>)

2. Alcohol consumption

Alcohol consumption from 1960 onwards according to beverage categories (National data or data from World Drink Trends): According to the Estonian Institute of Economic Research total consumption of alcohol per capita in 2004 was 13,1 litres with 5% growth in one year.

All of the republics in the European part of the former Soviet Union experienced marked improvements in life expectancy after the imposition of Gorbachev's anti-alcohol campaign in 1985. There is now considerable evidence that these changes can be attributed to the reduction in traditionally extremely high rates of alcohol related death. However, these improvements were short lived and life expectancy in Estonia has fallen since 1989, accompanied by removal, or failure to enforce, controls on alcohol imports and production.

Although only one measure of alcohol related mortality, rates of chronic liver disease and cirrhosis have the advantage of relative specificity, compared with other causes where the contribution of alcohol may be more variable, such as injuries, and can be used to give an idea of the scale of the problem. Between 1990 and 1995, age standardised death rates from chronic liver disease and cirrhosis doubled in Estonia

Official statistics on consumption are often derived from official sales data. However, this is of limited value in situations such as those in Estonia where there is extensive smuggling and illicit production. According to the WHO the rate of consumption was in 1991 - 17,88 litres per capita. In 1996 it was only 6,43. From there it has grown to 13,1 in 2004. These statistical numbers in 90-s are not trustworthy. During the Soviet period the regime did not want to show the real situation so there is no proved data from that time of period.

The use of spirits, wine and beer has constantly increased during the last 10 years among men and women. From 1999-2002 the spirits industry grew up to 88%.

The research of the Estonian Institute of Economic Research shows that in 1995 31% of student boys have consumed strong alcohol atleast three times in last 30 days. In 2003 already 50% said that. In 1995 only 10% of pupils said that they have been drunk more than 20 times in life. In 2003 33%. Growth of drunkenness may be explained by the choice of alcohol – when the beer drinking has stayed the same compared to the year 1999, wine drinking have decreased, then drinking strong alcohol have been seriously increased.

Figures on unrecorded alcohol consumption by beverage categories. (Give at least rough estimates on unrecorded alcohol production, smuggling, the importance of drinking by tourists, border trade and alcohol imports by travelers. Example: Smuggling of alcoholic beverages is unimportant in regard to total alcohol consumption): One source estimates that 45% of alcohol consumed in Estonia is from illegal sources. According to the Estonian Institute of Economic Research Estonians drunk 1,32 litres illegal alcohol per capita.

In September 2001 68 people died in Pärnu county because they bought illegal alcohol. The drink was laced with poisonous methyl alcohol, and sold in refilled half-litre plastic bottles in the seaside resort of Pärnu, about 125km from Tallinn. 30 children lost mother or father or both. Convicted criminal, who was selling the drink, received 5 years imprisonment.

Average tourist bought 1,2 litres spirits in 2003 and 3 litres on 2004. An average tourist bought 12,6 litres beer in 2003 and 21,6 litres in 2004. Tourist's total consumption on 2004 was about 1,2 litres per capita.

Drinking habits according to latest population survey if available (percentage of abstainers, overall drinking frequencies, weekly rhythm of drinking, drinking frequencies by beverage type, hazardous and harmful alcohol consumption, alcohol dependence, binge drinking, gender differences, differences between age groups): WHO shows that in 2003 6,9% of adults qualify as heavy episodic drinkers (At least once a week consumption of five or more standard drinks in one sitting.) Heavy episodic drinkers among young adults aged 18–24 years old are 6,0% (At least once a week consumption of five or more standard drinks in one sitting). A 2002 cross-sectional survey of adults aged 16 to 64 years found that 18.5% of males and 8.7% of females reported binge drinking at least once a week and 2.8% of males and 1.1% of females reported binge drinking almost daily. (Source: Kasmel A, Lipand A, Markina A.)

According to the 2001/2002 HBSC survey , the proportion of 15-year-olds who reported ever having been drunk two or more times was 56.7% for boys and 42% for girls (Source: WHO Health Policy for Children and Adolescents (HEPCA), 2004.).

In 2001, the incidence rate of alcohol dependence was 240 per 100 000 inhabitants for men and 32 per 100 000 inhabitants for women (Source: Estonian Health Statistics 2000–2001).

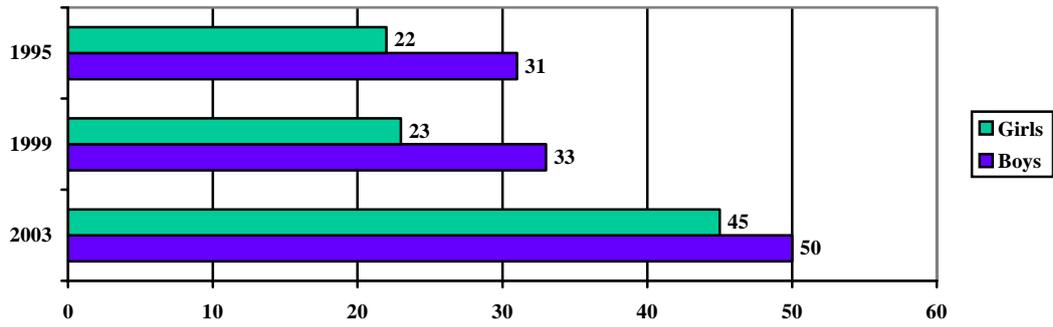


Fig 1 - Students who have consumed strong alcohol during last 30 days at least three times.

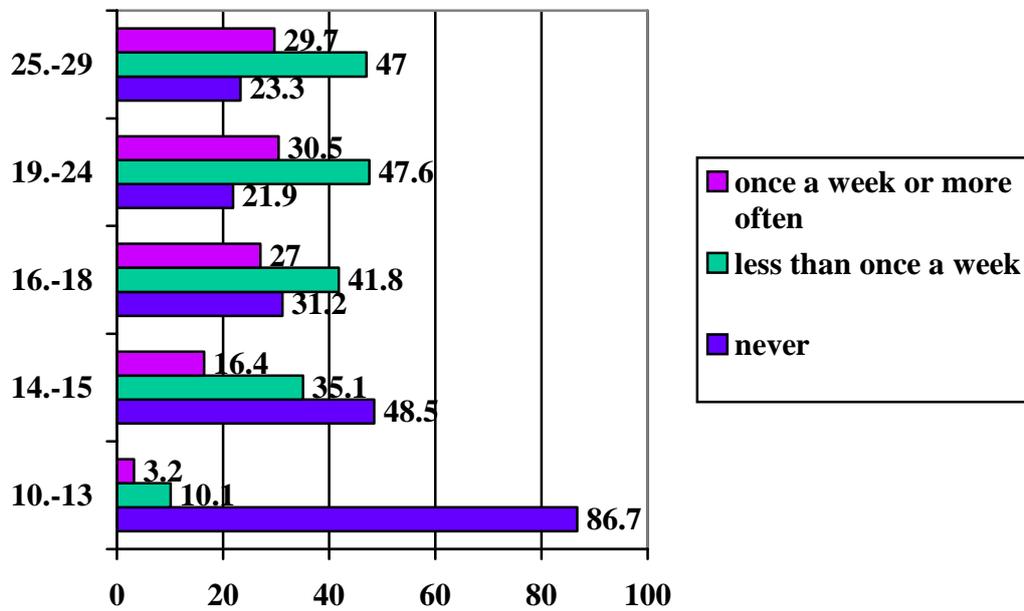


Fig 2 - Intensity of being drunk during last month. Different age groups.

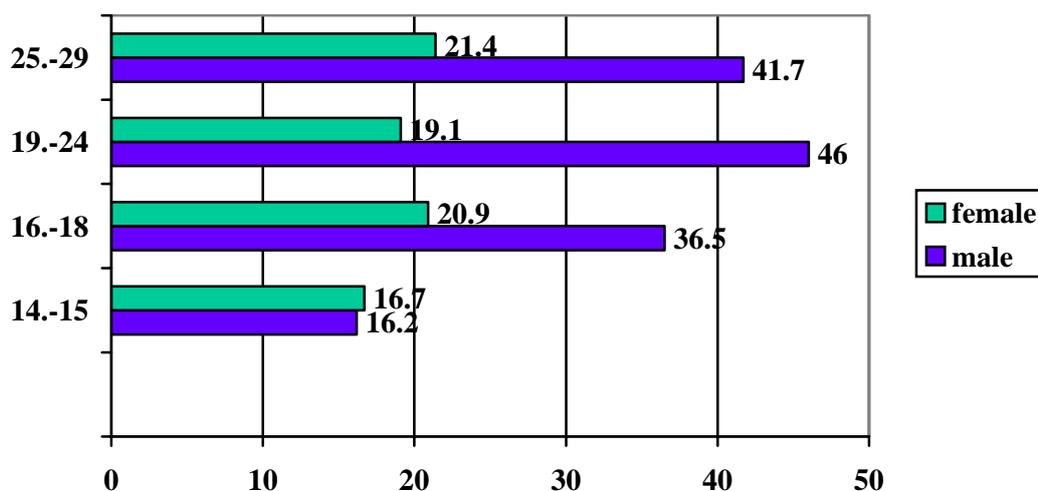


Fig 3 - Use of alcohol in once a week or more often for males and females.

Source: (Tallinna Pedagoogika Ülikooli Rahvusvaheliste ja Sotsiaaluuringute Instituut (Airi-Alina Allaste). Tervise Arengu Instituut

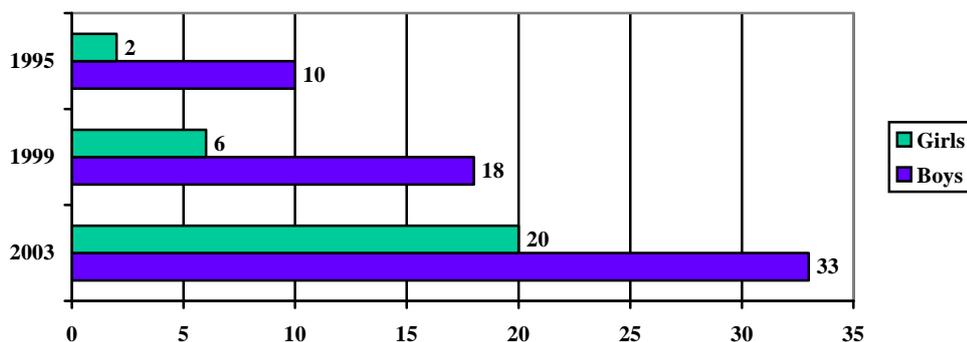


Fig 4 - Percentage of the pupil, who have been drunk more than 20 times in life.

3. Alcohol production and trade

There is no viticulture.): 60% of the beer in Estonia comes from domestic production. 9% from Finland, 6% from Russia, 5% from Germany, 3% from Netherlands and 17% from other countries. 72% of the spirits comes from the domestic production. 9% from Russia, 5% from Sweden and Finland, 3% from Belgium, 2% from Ukraine and 4% from other countries. Beer production in 2004 was 83,29 million litres. Domestic wine was produced 2,59 million litres.

In the first nine months of 2004 export of the domestic beer - 20,9 million litres. That makes 10,9% more than year before (18,9 million litres on 2003). Biggest growth was in wine industry. In 2003 (first nine months) Estonia exported 24 000 litres of wine. In 2004 the number was already 176 000.

Main spirits producers:

- Onistar Ltd. is a private concern based on Estonian capital, which combines Estonian spirits producers, Sillamäe brewery and a distillery. In addition to spirits, vodka and beer company also produces low alcohol beverages and table water as well as bottles cognac, brandy and whisky. Onistar is the only Estonian producer to own spirit factories and to produce all its products from the local raw materials.
- The turnover of AS LIVIKO, the biggest company manufacturing and marketing strong alcoholic drinks in Estonia, amounted to EEK 355 million in 2001. Compared to the similar conditions of the previous year, the turnover increased by 51 percent. The sales of the company's products in the domestic market and into other excise warehouses increased by 40 percent during the accounting period; exports, on the other hand, increased twofold. Exports made up 22 percent of the turnover of company's products. The year 2001 ended for the company with EEK 23 million in profits, of which commercial profit accounted for EEK 21 million.

Main beer producers:

- Tartu brewery. In 2002 Tartu Brewery was named the best enterprise in Tartu and for the last two years the best food industry enterprise in Estonia, the best investor, etc.
- Tartu Brewery was established in 1826
- Saku Brewery. Through big investments Saku Brewery has become the market leader on the Estonian beer market. The market share of Saku in 1999 accounted for 50% of the total market. The total sales of beer and mineral water by Saku amounted to 51.6 million litres in 1999.
- The main product of Saku Brewery is Saku Originaal - the leader of Estonia's beer market since 1995. According to the market research by Emor, Saku Originaal is the most recognised and popular Estonian beer.

4. Administrative structure of alcohol policy

Current administrative structure of alcohol policy and changes in it since 1995 (which authorities have responsibility for which activities?): There is no official alcohol policy in Estonia. The Ministry of Social Affairs was founded on 1 February 1993. Three ministries - Ministry of Health Care, Ministry of Social Welfare, and Ministry of Labour - were merged and formed to the Ministry of Social Affairs. The area of government of the Ministry of Social Affairs includes among other tasks the management of public health protection and medical care. In 2003, the Ministry of Social Affairs prepared the National Strategy for Prevention of Drug Abuse for 2004-2012, which received a positive opinion from international experts of the European Monitoring Centre for Drugs and Drug Addiction. In 1997 the Strategy included also alcohol abuse, but from 2004 Estonian Government focused on drug and HIV problems only. The aim of the strategy is to develop a common drug policy which focuses at decreasing drug supply and demand and the damage done through drug abuse. The National Strategy for Prevention of Drug Abuse was first read in the government on 30 October 2003, and the costs pertaining to implementation of the strategy are being specified at the moment. After the activity report and costs have been specified, the strategy is ready to be presented to the government for the second time. The 2004 priority objective of the

National Strategy for Prevention of Drug Abuse is strengthening the drug addiction treatment and rehabilitation system as well as raising the quality of the services offered and making them better accessible to the public. The National Programme is implemented by the National Institute for Health Development.

Excise duty is collected by Customs and Tax Board.

5. Licensing policy

Box 5.1 State control on production and foreign trade of alcohol						
State monopoly						
	Beer		Wine		Spirits	
	Yes	No	Yes	No	Yes	No
Production	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
Import	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
Export	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
License is required						
	Beer		Wine		Spirits	
	Yes	No	Yes	No	Yes	No
Production		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
Import		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
Export		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>

Box 5.2 State control on wholesale and retail sale of alcohol						
State monopoly						
	Beer		Wine		Spirits	
	Yes	No	Yes	No	Yes	No
Wholesale	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
Off-premise retail sale	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
On-premise retail sale	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
License is required						
	Beer		Wine		Spirits	
	Yes	No	Yes	No	Yes	No
Wholesale		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
Off-premise retail sale		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
On-premise retail sale		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>

Box 5.3 Selling or serving of alcohol in retail outlets				
	Off-licence (shops, kiosks, retail stores, supermarkets)		On-premise (bars, cafés, pubs, restaurants)	
	Yes	No	Yes	No
All retail outlets are allowed to sell/serve alcoholic beverages	<input type="checkbox"/>			<input type="checkbox"/>
A license is required, but all applicants get one	<input type="checkbox"/>		<input type="checkbox"/>	
A license is required, some applicants do not get one		<input type="checkbox"/>		<input type="checkbox"/>
Alcohol is only sold/served in specific/regulated premises		<input type="checkbox"/>		<input type="checkbox"/>

- Comments on the prevailing situation of the state control and licensing practices on alcohol production and major changes since 1995

- who is granting the licenses: Ministry of Economic Affairs and Communications
- are the licenses permanent or temporary: permanent
- do the licenses cost anything: 300 EEK
- are there any specific rules or regulations included in the licenses: Need for the Veterinary and Food Board and Excise commodities warehouse approval.

- Comments on the prevailing situation of the state control and licensing practices on foreign trade of alcohol and major changes since 1995

- who is granting the licenses: Ministry of Economic Affairs and Communications
- are the licenses permanent or temporary: permanent
- do the licenses cost anything: 300 EEK
- are there any specific rules or regulations included in the licenses: Need for the Veterinary and Food Board and Excise commodities warehouse approval.

- Comments on the prevailing situation of the state control and licensing practices on alcohol wholesale and major changes since 1995

- who is granting the licenses: Ministry of Economic Affairs and Communications
- are the licenses permanent or temporary: permanent
- do the licenses cost anything: 300 EEK
- are there any specific rules or regulations included in the licenses: Need for the Veterinary and Food Board and Excise commodities warehouse approval.

- Comments on the prevailing situation of the state control and licensing practices on off-premise retail sale of alcohol and major changes since 1995

- who is granting the licenses: Ministry of Economic Affairs and Communications
- are the licenses permanent or temporary: permanent
- do the licenses cost anything: 300 EEK
- are there any specific rules or regulations included in the licenses: Need for the Veterinary and Food Board approval.

- Comments on the prevailing situation of the state control and licensing practices on on-premise retail sale of alcohol and major changes since 1995

- who is granting the licenses: Ministry of Economic Affairs and Communications
- are the licenses permanent or temporary: permanent
- do the licenses cost anything: 300 EEK
- are there any specific rules or regulations included in the licenses: Need for the Veterinary and Food Board approval.

- Are off-premise licenses for all or some alcoholic beverages granted only for special alcohol retail stores? Yes No

If yes, is this license for selling: distilled spirits, wine, beer.

If no, are off-premise licenses for alcoholic beverages granted for: supermarkets, ordinary grocery stores, kiosks, gasoline stations.

6. Restrictions of availability

Alcoholic beverages cannot be sold to persons under 18 years of age and persons under 18 years old cannot consume them in public. There is no legal age restriction on alcohol consumption in private. The licence-holder that serves alcoholic beverages to those aged under 18 years can be convicted and fined. Riigikogu (Estonian Parliament) accepted (12.12.2004) the law that makes the second time alcohol selling to the minor a criminal act. Punishment for that crime could be up to one-year imprisonment.

Public opinion is worried about the capabilities to uphold these laws. At the same time public awareness has broadened and incidents where alcohol is sold to minors (at least in bigger markets) have probably become more rare.

Box 6.1 Age limits for buying alcoholic beverages		
	Off-premise, take-away (stores, shops, supermarkets)	On-premise, drinking on the spot (cafes, pubs, restaurants)
Beer	18 years	18 years
Wine	18 years	18 years
Spirits	18 years	18 years

During the last year different local town and county governments have accepted the restrictions for hours of sale. Most local governments have decided that alcohol should not be sold from 22.00 to 08.00, except in bars and restaurants. Police have made recommendations to different regions to follow that example. That way police and local county and town governments are working together against the alcoholism in Estonia. This has proved to be one of the most effective ways for that kind of co-operation. There are no laws that ban selling on Sunday or any other weekday. In 2001 Riigikogu accepted the law that banned selling alcohol on kiosks.

Box 6.2 Sales restrictions on off-premise sale of alcohol						
	Beer		Wine		Spirits	
	Yes	No	Yes	No	Yes	No
Hours of sale are restricted	<input type="checkbox"/>					
Days of sale are restricted	<input type="checkbox"/>					
Places of sale are restricted	<input type="checkbox"/>					
Density of outlets is restricted	<input type="checkbox"/>					

During the last year different local town and county governments have accepted the restrictions for hours of sale. Most local governments have decided that alcohol should not be sold from 22.00 to 08.00, except in bars and restaurants. Police have made recommendations to different regions to follow that example. That way police and local county and town governments are working together against the alcoholism in Estonia. This has proved to be one of the most effective ways for that kind of cooperation. There are no laws that ban selling on Sunday or any other weekday. There are no restrictions for pubs, bars or restaurants.

Box 6.3 Sales restrictions on on-premise sale of alcohol						
	Beer		Wine		Spirits	
	Yes	No	Yes	No	Yes	No
Hours of sale are restricted						
Days of sale are restricted	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
Places of sale are restricted		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
Density of outlets is restricted	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	

7. Alcohol taxation and prices

According to the Alcohol, Tobacco and Fuel Excise Duty Act, effective from April 1, 2003 and amended from May 1, 2004 and January 1, 2005 the excise duty is imposed on wine, beer, fermented beverages, intermediate products and other alcohol produced in Estonia or brought into Estonia.

Alcohol must be produced in an excise warehouse (§ 21 (4)). The excise warehouse is a place where excise goods can be produced, stored, received or dispatched under an excise suspension arrangement. Mainly excise duty is payable upon importation or release for consumption from excise warehouse or receipt of alcohol by registered trader. Excise duty accrues to the state budget; 3.5 percent of the receipts are transferred to the Estonian Cultural Endowment Fund. Excise duty rates - Table 1.

Table 1 ESTONIAN EXCISE DUTY RATES ON ALCOHOL IN EUROS

Alcohol	Unit	2005	01.01.2006	01.01.2007	EU minimum
Wine	Hectolitre	(≤ 6 %): 21,79 (> 6 %): 66,47	(≤ 6 %): 22,88 (> 6 %): 66,47	(≤ 6 %): 24,03 (> 6 %): 66,47	0
Fermented beverage	Hectolitre	(≤ 6 %): 21,79 (> 6 %): 66,47	(≤ 6 %): 22,88 (> 6 %): 66,47	(≤ 6 %): 24,03 (> 6 %): 66,47	0
Beer	1 % alcohol in hectoliter	3,71 (≤ 3000 hl): 1,85	3,90 (≤ 3000 hl): 1,95	4,09 (≤ 3000 hl): 2,04	1,87
Intermediate product	Hectolitre	107,37	112,74	118,36	45
Other alcohol	Hectolitre of pure alcohol	971,46	1022,59	1073,72	550

Alcohol tax incomes in state budget (the amount of alcohol excise duties, the amount of VAT on alcohol sales, alcohol tax revenue per capita, state alcohol tax revenues in percent of all state revenues): Alcohol tax incomes in state budget

2004 - 1 690 079 000 EEK

2003 - 1 294 214 000 EEK

2002 - 1 217 744 000 EEK

Box 7.3 Price of alcoholic beverages		
Off-license (i.e. when purchased in an average shop, or supermarket, NOT on-premise in a restaurant or bar)	Usual quantity (e.g. 1 litre, 0.5 litres)	Price (local currency)
Average locally produced or most consumed beer	1 litre	16.90 EEK
Average and most consumed table wine	75 cl	75-100 EEK
Average locally produced or most consumed spirits	70 cl	99 EEK
If it exists, other special or different local alcoholic beverage, name and % alc. vol.		
Average non-alcoholic soft drink (e.g. coca-cola, lemonade)	1 litre	10.90 EEK

Source: http://europa.eu.int/comm/taxation_customs/publications/info_doc/taxation/excise_tables_partI.pdf, CEPS

8. Alcohol advertising and sponsorship

Box 8.1 Restrictions on advertising and sponsorship*				
	Complete legal ban	Partial legal restriction	Voluntary agreement	No restrictions
EXAMPLE National TV	<i>S (spirits)</i>		<i>W (wine)</i>	<i>B (beer)</i>
National TV				
Cable TV		S, W, B		
National radio		S, W, B		
Local radio		S, W, B		
Printed newspapers/magazines		S, W, B		
Bill boards	S	W, B		
Internet				S, W, B
Points of sale				S, W, B
Cinema	S, W, B			

13. Summary

Alcohol policy in Estonia is forming and changing. Although overall consumption is growing the public awareness about alcohol problem is also clearing.

Use of alcohol has been for Estonians a mark of free choice. When in 1988 Estonian national flag was for the first time in a formal gathering, national leaders celebrated it afterwards privately and they wrote that "the glasses of champagne was also mark of freedom". Until that time, during the Gorbachev dry-era, everywhere was served only juice or mineralwater. So, in a bizarre way, the right to drink alcohol became a sign of independence and freedom.

All the possible restriction for alcohol use has been tabu for years. But this understanding of "freedom" has caught one of the smallest nations attention. When in September 2001 68 people died because they drank something that was laced with poisonous methyl alcohol, media started to talk about good (legal) and bad (illegal) alcohol. A little later drunkdriver killed one of the best professional cyclist, Lauri Aus. Media turned its attention to the facts what were connected to the alcohol use. Over 60% of the injuries, 74% of the drownings, 72% of the car accidents, 59% of the suicides are connected to the alcohol, also the "good" alcohol.

From the beginning of the year 2003 local county and town governments started to legalise timelimits for the alcohol selling. In most places alcohol business is forbidden from 11 PM to 8 AM. Tallinn town government organised referendum to find out what citizens might think. 64% of the voters were for the forbidding.

In the beginning of April 2005 two parliamentarians resigned from the Parliament because they caused wide disturbance in public while being drunk. These are not the only incidents when politicians are standing down because of the pressure from the public opinion.

In June this year different Estonian breweries are signing the selfregulation code which is more conservative than in most European countries. Among other things breweries agree not to advertise stronger beers than 8% and produce stronger beers than 10%.

Riigikogu (Estonian Parliament) accepted (12.12.2004) the law that makes the second time alcohol selling to the minor a criminal act. Punishment for that crime could be up to one year imprisonment. In 2003 Estonian Temperance Union was reorganised. This was the startingpoint to get the temperance idea closer to people. Leaders of the temperance movement believe that work of the politicians and the work of different institutes and public health centres are important, but to improve the situation it needs also change in peoples minds. That involves the grassroot work of the NGOs.

Sources:

Estonian Institute of Economic Research - <http://www.ki.ee/>

Ministry of Economic Affairs and Communications - <http://www.mkm.ee/index.php?keel=en>

Ministry of Social Affairs - <http://www.sm.ee/eng/pages/index.html>

Ministry of Finance of Estonia - <http://www.fin.ee/?id=6108>

National Institute of Health Development - <http://www.tai.ee/?lang=en>

Veterinaar- ja Toiduamet - www.vet.agri.ee/

Estonian Temperance Union - www.ave.ee

Baltic News Service - www.bns.ee