

Spain

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The country

Spain is situated in south-western Europe, occupying most of the Iberian peninsula which is surrounded on the east and south-east by the Mediterranean Sea, on the south-west and west by the Atlantic Ocean and on the north by the Bay of Biscay.

Spain has a population of 40.8 million inhabitants (data for 2001, Instituto Nacional de Estadística INE, 2004). The total area of the country is 505,990 km² and the population density 77 inhabitants per km². The capital and largest city is Madrid, with 2.9 million inhabitants. About 77 per cent of the people are living in towns and cities. Although most of the Spaniards are still registered in the Roman Catholic church, active religious practice has dropped dramatically, while civil weddings, unmarried couples living together and divorces have increased considerably.

Despite a climate of high temperatures and generally low rainfall, nearly one third of the Spanish territory is suitable for cultivation. Olive trees and grapes are widely grown, and Spain is one of the world's leading wine producers. The vineyard's area was of 1,213 thousands of hectares, in the year 2000. The country also has many mineral resources, including coal, iron, and petroleum. Traditionally an agricultural country, Spain saw a rapid industrial growth during the late twentieth century. The country has also a lively and flourishing tourism industry. In 1998 Spain had 47.7 million visitors, making it one of the world's top tourist destinations. In the mid-1990s about 30 per cent of the population worked in the industrial sector, approximately 9 per cent in the agriculture and about 61 per cent in the service sector. The food and beverage sector is the most important one within the manufacturing industry, both concerning turnover and added value (respectively 5th and 4th in the 15-countries Europe, in 2001), hiring 17% of the working population (8.5% for the alcohol sector). The alcoholic beverages make up 14% of the food industry offer. In 2002, the sales of wine were 4.8 million euros and other alcoholic beverages for 3.4 million euros (Federación Española de Industrias de Alimentación y Bebidas FIAB www.fiab.es).

In the late 1970s, the government of Spain underwent a transformation from the dictatorship of Francisco Franco, who ruled from 1939 to 1975, to a constitutional monarchy. A national constitution was adopted in 1978. The head of the state is the hereditary monarch. Executive power is held by the prime minister, the cabinet, and the Council of States, which is a consultative body. The Spanish parliament consists of the Senate with 259 members, 51 of them being special regional representatives, and the Congress of Deputies with 350 members. The Congress of Deputies elects the prime minister proposed by the monarch.

The Spanish population includes large linguistic minorities like the Catalans, the Galicians, and the Basques. Most of the people speak Castilian, also known as Spanish, but also Catalan, Galician, and Basque are official languages. The 1978 constitution allowed for two types of autonomous regions, each with different powers. Catalonia, Galicia and the Basque provinces were defined as historic nationalities and were given special autonomy. While the autonomous regions have assumed substantial powers of self-government, the issue of regional versus central governmental power is still controversial. Each of Spain's 17 autonomous regions elects a unicameral legislative assembly, which selects a president from among its members. Seven autonomous regions are composed of only one province, while the other ten are formed of two or more provinces.

Alcohol production and trade

At the beginning of the 1950s, yearly wine production was about 16 million hectolitres. In the early 1970s, the corresponding figure was around 26 million hectolitres (International statistics, 1977). By the late 1970s annual wine production had increased to about 50 million hectolitres. Since then wine production has decreased, and in the years 1995-1998 it was around 31 to 36 million hectolitres in a year, meaning that Spain was the world's third leading wine-producing nation (World Drink Trends, 2002). In the year 2000, the production of new wine was 41,173,936 hl (INE, 2004)

Imports of wine were on a very low level until 1993. In that year 0.1 million hectolitres of wine was imported. Since then, wine imports have increased and in 1995 they amounted to 2.4 million hectolitres, which was 16 per cent of the Spanish wine consumption (Hurst, Gregory & Gussman, 1997). At the beginning of the 1950s exports of wine were less than 1 million hectolitres a year. By the early 1970s they had increased to over 3 million hectolitres (International statistics, 1977). At the beginning of the 1980s, exports of wine reached 4 million hectolitres. Since then exports of wine have fluctuated between 4 and 10 million hectolitres a year. In the mid-1990s wine exports were about 7 million HECTOLITRES a year, which is about one third of the total Spanish wine production. In the beginning of the current decade, exports have steadily increased, with 1,475.1 million litres (value of 1,273.3 million euros) sold in 2003. Exports had increased in value (5.9%) and volume (22.8%), whereas price (1.16 euros / litre) had decreased 13.81% compared with the year 2002 (Statistics of the Federación Española del Vino).

Although Spain is famous for its sherries, more than half of Spain's wine production consists of table wines. The regions where quality wines are produced are controlled by the Instituto Nacional de Denominaciones de Origen. There are 34 regions of Denomination of Origin and four regions of Provisional Denomination of Origin in which the regulating boards control the types of wine that can be grown and the pruning methods. In 1995, quality wines accounted for 45 per cent of total wine production (Hurst, Gregory & Gussman, 1997).

Spain is also a major producer of distilled spirits. In the mid-1960s the yearly production of distilled spirits was about 2 million hectolitres (International statistics, 1977). In 1979 it reached the figure of 4 million hectolitres. Since then, the production

of distilled spirits has fluctuated around a downward trend, and in the mid-1990s the production of distilled spirits had decreased to about 2.5 million hectolitres in a year.

At the beginning of the 1980s both the exports and imports of distilled spirits were about 0.2 million hectolitres a year, which meant that imports accounted for about 7 per cent of domestic consumption of distilled spirits and exports accounted for about 7 per cent of domestic production of distilled spirits. Since then, both exports and imports of distilled spirits have increased, and the increase in imports has been faster than the increase in exports. In the mid-1990s, nearly half a million hectolitres of distilled spirits, nearly a fifth of the Spanish spirits production, was exported. Imports of distilled spirits had increased to 1.5 million hectolitres, which was nearly half of the Spanish consumption of distilled spirits. Like the imports of wine, imports of distilled spirits have increased especially after 1992.

In the late 1950s, some 3 million hectolitres of beer were produced annually in Spain. In the mid-1970s, the corresponding figure was 16 million hectolitres (International statistics, 1977). The production of beer was increasing until the early 1990s. In 1989 it reached 27 million hectolitres. The yearly beer production was 27,860,422 in 2002 and Spain has become the third beer producer in Europe. Exports of beer have been on a low level. Even if they have increased since the mid-1970s, they were still only 1 to 2 per cent of the Spanish beer production in the mid-1990s. In 2002, 751,953 hl were sold abroad, with a 110% increase in exports in the last 7 years. Imports of beer were also negligible in the mid-1970s. Since then they have increased to 1 million hectolitres in 1990 and to 2 million hectolitres by the mid-1990s. In the mid-1990s the proportion of imported beer of total beer consumption was about 7 per cent (Hurst, Gregory & Gussman, 1997). Imports are around 3 million hectolitres in the current decade (Cerveceros de España, Informe económico 2002).

In 1995, there were 15 independent brewing companies in Spain, operating altogether 25 breweries. The four largest companies accounted for about 75 per cent of domestic beer production. Foreign brewing companies hold significant portions of Spain's major breweries, and a part of domestic beer production includes foreign brands produced under licence (Hurst, Gregory & Gussman, 1997). Cerveceros de España includes 7 major companies groups .

Alcohol consumption

At the beginning of the 1960s, total alcohol consumption in Spain was about 10 litres per capita. There is no data on production and consumption of distilled spirits from 1950 to 1961. If the consumption of distilled spirits was on about the same level in the early 1950s as at the beginning of the 1960s, the total alcohol consumption at the beginning of the 1950s would have been about 8 litres per capita. In any case, it seems quite evident from table 16.1 that the total alcohol consumption was growing both in the 1950s and 1960s and in the first half of the 1970s. Per capita alcohol consumption peaked in 1975, when it reached a level of 14 litres. Since then the total alcohol consumption has been on the decrease, and by 2000 it had come down to 10 litres per capita a year.

Table 16.1. Consumption of alcoholic beverages by beverage categories in Spain in litres of pure alcohol per capita and as percentages of total recorded alcohol consumption in the years 1955, 1965, 1975, 1985 and 1995, five years' averages

	1955	1965	1975	1985	1995*
Total alcohol consumption	..	11.06	13.52	11.47	10.10
Consumption distilled spirits	..	2.34	2.72	2.88	2.50
Consumption of wines	6.94	7.64	8.74	5.82	4.55
Consumption of beer	0.27	1.08	2.06	2.77	3.05
Percentage of distilled spirits	..	21	20	25	25
Percentage of wines	..	69	65	51	45
Percentage of beer	..	10	15	24	30

* Hurst, Gregory & Gussman (1997, 400) gives for the 1990s higher consumption figures for wine than World Drink Trends (2002, 116). If taken directly from the World Drink Trends, the figure for total alcohol consumption per capita in 1995 was 9.8 litres (World Drink Trends, 2004)

Sources: Hurst, Gregory & Gussman, 1997; World Drink Trends, 2002.

According to the World Drink Trends (2004) data, the Spanish per capita consumption has developed as follows from 1995 to 2002.

Table 16.1.1. Consumption of alcoholic beverages by beverage categories in litres (in litres of pure alcohol, in the case of spirits) and by litres of pure alcohol per capita in the years 1996 to 2002 (World Drink Trends, 2004).

	1996	1997	1998	1999	2000	2001	2002
Total alcohol consumption	9.3	10.1	10.1	9.9	9.8	9.8	9.6
Consumption distilled spirits	2.40	2.60	2.50	2.40	2.40	2.40	2.40
Consumption of wines	30.3	35.1	35.6	34.0	32.0	30.0	29.6
Consumption of beer	66.0	66.7	66.9	69.1	71.6	75.7	73.4

In 2003, Spanish figures about alcohol consumption in general population (15-64 year-old) were: 88.6% life-time consumers, 76.6% last 12 months consumers, 64.1% last 30 days consumers and 14.1% daily consumers. These percentages have altogether remained stable since 1997 (Encuesta Domiciliaria sobre Abuso de Drogas en España, 2003).

Like the total alcohol consumption, the consumption of wine was also increasing in the 1950s and 1960s and peaked in the mid-1970s, when it reached a level of 77 litres per capita a year. At the beginning of the 1950s, the per capita consumption of wine had been about 50 litres, and in the mid-1960s around 63 litres. In the second half of the 1970s and in the 1980s, the consumption of wine decreased almost constantly, but in the 1990s it has stayed quite stable. However, the decreasing trend meant that in less than two decades wine consumption fell by 50 per cent. In 2000, the yearly consumption of wine per capita was 33 litres, which is clearly less than in the early 1950s (World Drink

Trends, 2002). In 2002, the consumption had fallen to 29.6 per capita litres (World Drink Trends, 2004).

In the 1960s and in the first half of the 1970s, the growth in consumption of distilled spirits kept up with the pace of the growth in the total alcohol consumption. Consumption of distilled spirits continued to increase even in the second half of the 1970s, and peaked in 1981 at 3.2 litres alcohol per capita or 9 beverage litres of distilled spirits. Since then the consumption of distilled spirits has declined, and in the late 1990s it was just under 7 litres per capita of the product, or 2.4 litres of alcohol per capita (World Drink Trends, 2002). The same consumption has been calculated for 2001 and 2002 (World Drink Trends, 2004).

Beer consumption increased fairly steadily from the early 1950s to the early 1990s. In 1990, beer consumption per capita was 72 litres. The growth rate during the last four decades is quite astonishing as beer consumption in 1959 was only 2.2 litres of the product per capita. In the 1990s beer consumption has fluctuated a little but in 2000 it was 72 litres a year, exactly the figure in 1990 (World Drink Trends, 2002). According to the Brewers of Spain (Economic Report, 2002), Spaniards drank 73.4 l per capita in 2001, with a total consumption of 30,715,282 hl, representing 91% domestic production.

In the mid-1960s over two thirds of all alcohol consumed was still in the form of wine. Nowadays wine accounts for about 45 per cent. Beer is the beverage which has most clearly increased its proportion of the total alcohol consumption, from a few per cent at the beginning of the 1950s to 30 per cent in the late 1990s. Also the proportion of distilled spirits of the total alcohol consumption has increased from one fifth in the first half of the 1960s to one fourth in the late 1990s.

Alcoholic beverages have played an important part as a source of nutrition and in the social and dietary habits of the Spaniards. The pattern of mixing drinking with food, work and social habits is still very common, but it is thought that drinking habits are moving closer to those in Central European countries. In comparison with wine and distilled spirits beer has increased its popularity relatively recently. From being a beverage mostly drunk in bars, on holidays and at leisure events, beer has greatly increased in popularity, and nowadays it also competes with wine at the table. Nevertheless 75% of beer consumption takes place at the hospitality sector (Cerveceros de España, 2002). Beer has become popular especially among young people, being a sort of symbol of casual and modern life. Rapid urbanisation is said to be an important contributing factor to the increased popularity of beer (Hurst, Gregory & Gussman, 1997; see Karlsson & Simpura, 2001 and Simpura & Karlsson, 2001).

Altogether alcohol industry accounts in Spain for 20% of the sales of the food industry, for a turnover of around 11,000 million euros. It includes 4,050 workplaces throughout the country and work to 5,000 people who directly work in this sector (Data of the Federación Agroalimentaria, 2004).

In spite of the traditional home consumption of wine, Spaniards consume most alcoholic beverages in restaurants or bars. It is estimated that 75 per cent of beer, 80 per cent of distilled spirits and 47 per cent of wine are consumed outside the home. There

has, however, been a trend towards greater home consumption, particularly of wine and distilled spirits. This trend is also reflected in the consumption rate of draught beer, which was 39 per cent in the late 1980s, whereas the corresponding figure in 1995 was 35 per cent. Half of beer consumption in Spain consists of special beers with an average alcohol content of 5.5 per cent by volume. In 1994 the consumption rate of normal beer was 44 per cent, and that of low alcohol beer, alcohol content less than one per cent by volume, was 7 per cent. The consumption of the so-called non-alcoholic beer is increasing (16.8% of all the beer consumption, with 7.7% of the selling rate), Spain being currently the European country with the highest rate of non-alcoholic beer. In 1988 red wines accounted for almost half of the wine consumption (Hurst, Gregory & Gussman, 1997).

Most of the distilled spirits consumed in Spain have traditionally been produced domestically. Brandy used to be Spain's most popular distilled spirits, accounting for 46 per cent of the market in 1975, and followed by anise-flavoured drinks with 15 per cent of the markets. By the mid-1990s, the market share of brandy had decreased to 18 per cent and that of anise-flavoured drinks to 6 per cent. These alcoholic beverages together with gin were the most produced drinks in Spain. On the other hand, whisky, which is mainly an imported drink, has increased its rate in twenty years from 8 to 31 per cent of the consumption of distilled spirits (Hurst, Gregory & Gussman, 1997).

A large number of tourists visit Spain every year. In 1989, for instance, there were some 54 million visitors to Spain and they stayed an average of three days. This has given rise to arguments that the true level of Spanish alcohol consumption is lower than the official statistics indicate. For instance, according to Hurst, Gregory & Gussman (1997) "in 1991 it was estimated that tourists accounted for 15 to 25 per cent of alcohol consumption" (Hurst, Gregory & Gussman, 1997, 399). They do not, however, give the source for this estimate. It should therefore be noted that 54 million visitors for an average of three days means that there are less than half a million tourists in Spain each day. If these "half a million tourists" in a country of 39 million inhabitants are drinking 20 per cent of the recorded consumption, they have to drink 20 times more than the local people, or in fact 40 centilitres of pure alcohol a day, which does not sound credible or even possible. In the ECAS project, Trolldal (2001) has estimated the importance of tourism and according to his estimate the net effect of tourism is less than one per cent of the total consumption (Trolldal, 2001, 75).

In his analyses in the ECAS project, Leifman (2001) estimated the unrecorded consumption in Spain to be approximately one litre. The grounds are, however, quite questionable, as this figure for Spain comes from a study conducted in the early 1970s (International Statistics, 1977; see also Leifman, 2001, 61, 63). According to a time-series analysis comparing recorded alcohol consumption to alcohol-related mortality, the amount of unrecorded alcohol consumption in Spain fell somewhat from the beginning of the 1970s to the mid-1990s (Leifman, 2001, 65). In summary, after all these arguments a good starting point may still be that it is really the Spaniards that are consuming the alcohol recorded as the Spaniards' alcohol consumption.

Consumption of alcoholic beverages in terms of beverage volume was 112 litres per capita in 2000. In the same year, the per capita consumption of commercial non-alcoholic beverages was about 437 litres, consisting of 120 litres of milk, 98 litres of

coffee, 98 litres of soft drinks, 94 litres of bottled waters, 25 litres of juices and 2 litres of tea. During the 1990s, the consumption of bottled waters increased by 44 litres, the consumption of soft drinks by 26 litres, the consumption of coffee by 14 litres, and that of juices by 13 litres. The consumption of milk and tea stayed on the same level (World Drink Trends, 2002).

Administrative structure of preventive alcohol policies

In principle, the Spanish Ministry of Health has the overall responsibility for preventive alcohol policies in Spain. The state has exclusive competence on external health issues, basic legislation and general health coordination and legislation on pharmaceutical products. The autonomous regions may assume competencies on health and hygiene.

The autonomous regions have assumed control over public health and health planning. The autonomous governments are responsible for planning and carrying out health promotion and education programmes. The Ministry of Health is responsible for facilitating the coordination with and among the autonomous regions in health promotion issues.

Every region has its own programme on substance abuse. These programmes are autonomous, but they are coordinated for the whole of Spain by the Bureau of Alcoholism and Drug Addiction (Delegación del Gobierno para el Plan Nacional sobre Drogas). The Bureau was set up in 1984 within the Ministry of Health, mainly because of the increasing concern of illicit drug use in the society (ECAS APQ, 1999).

Even though the Bureau of Alcoholism and Drug Addiction was mainly formed because of the problems caused by illicit drug use, it has begun to pay increasing attention to matters concerning alcohol, especially issues related to alcohol and youth. As a matter of fact, alcohol and young people have become a major issue for the Bureau of Alcoholism and Drug Addiction, which especially fosters studies and activities aimed at preventing the risks of alcohol use among young people. Governmental alcohol policies are increasingly addressing youngsters, and a change in the legal age limit for drinking, 18 years for all regions instead of the 16 years limit, still in force in some regions (Asturias, Balearic islands, Castilla-León and Galicia), has been proposed. Educational programmes for the prevention of substance abuse have been developed since the 1980s and have always had alcohol as their main target. The programmes offered have increased in the last decade, with a huge variety of programmes covering different age groups. Small hospitals for treatment of alcoholics have also been established, and advertising against alcohol misuse has been undertaken at the regional government level. In 1995, authorities approved a road safety plan which included a number of measures aimed at reducing the incidence of driving under the influence of alcohol. Breathalysers were also introduced to measure the blood alcohol (BAC) levels (Hurst, Gregory & Gussman, 1997). The prevention of drunk driving has highly developed since the end of 2003. A Special Plan on Traffic Safety for 2004 was approved, drunk driving can be considered a crime deserving a prison sentence (Reforma of Penal Code approved by the Law 15/2003, enforced on October 1st 2004) and penalty points have been approved and will be enforced in the summer of 2005.

The national government has also conducted advertising campaigns aimed at prevention of alcohol-related traffic accidents. In 1995 the campaign emphasised that the social damages of drunk driving reach far beyond the individual perpetrator. This approach falls in line with the government's overall concern about the costs of alcohol abuse for public health.

Spain describes its alcohol control policy as covering only some aspects of the problems related to alcohol. According to Harkin (1995), the priorities in the 1990s have been as follows:

- discouraging drinking in schools, work settings and health care establishments,
- increasing the role of primary health care teams in prevention,
- focusing on early detection of alcohol problems,
- using price policy to reduce alcohol demand,
- addressing particular alcohol problems such as high weekend alcohol consumption by young people, and
- combating drunk driving.

In addition, Catalonia and the Basque provinces have specific bylaws concerning drinking in work settings. For instance, alcohol sales and consumption has been forbidden in the workplace at the Catalan transport companies since 1992. The Basque region forbids being under the influence of alcoholic beverages while on duty in working environments where intoxication could cause harm to other persons. This concerns drivers of public service vehicles, members of health staff, and members of armed forces.

(Hurst, Gregory & Gussman, 1997).

Campaigns are ongoing running both on the prevention of alcohol and other drugs misuse and on the prevention of drunk driving. In the year 2003, the Ministry of Health launched the campaign "Drugs have a price to pay – Open your eyes", and , in 2004 "Alcohol has a price to pay – Open your eyes", including the picture of a car with a sticker on it "Don't drive me, if you drink". A designated driver campaign has also been launched, sponsored by a social aspect organization.

Within the framework of the World Health Organization's (WHO) strategy health for all by the year 2000, the reduction of both alcohol consumption and its harmful effects was a priority objective of the Ministry of Health and Consumer Affairs. The Ministry of Health and Consumer Affairs organised inter-sectorial meetings between the different ministries involved, autonomous communities, professionals, organisations and volunteers in order to reconcile the diverse legislation on alcohol and to coordinate intervention policies on supply and demand (Moser, 1992).

Although several regional and national agencies handling matters concerning preventive alcohol policies have been established since the 1980s, there is still a very weak formal control on alcohol-related issues. The public is also not to any greater extent concerned about alcohol-related issues and problems. There is, however, a growing concern about the easy availability of alcoholic beverages to young people, and there is a growing

demand for restrictions on the availability of alcoholic beverages to young people in Spain.

In Spain there has never existed any substantial temperance movement. On the other hand, the alcoholic beverage industry has had quite an influential position in the society, since some regions depend very much on wine production. Wine producers are in fact a powerful pressure group, which clearly has had, and still has, an impact on politicians and the decision-making in Spain (ECAS APQ, 1999). In 1992, the alcoholic beverage industry formed an organisation called the Asociación De Distribuidores de Grandes Marcas de Bebidas (ADIGRAM), which saw itself as a key link with the national and local governments. In 1995, ADIGRAM launched a major campaign, which told consumers: To Drink with Moderation is Your Responsibility (Hurst, Gregory & Gussman, 1997). In 1998, producers (FEFBE) and distributors (ADIGRAM) merged in a new association, Federación Española de Bebidas Espirituosas (FEBE). In the year 2000, the spirits industry created a social aspect organization, "Alcohol y Sociedad", founded as a non-profit institution, with the main aims of "addressing all aspects connected with alcoholic beverages in an objective way, and instilling responsible habits in relation to alcohol consumption, especially amongst more sensitive groups (minors, young people, drivers, etc.).

Licensing policy

In Spain alcohol producers need a licence to operate factories to produce alcoholic beverages. The licence is granted by a territorial registry within the Ministry of Economy and Treasury, and it is mandatory for all factories, regardless of the products the factory produces, i.e. there are no special licences for producing alcoholic beverages. The requirements the factory has to meet in order to obtain the licence are in relation to the factory's building and production equipment as well as accounting.

The custom authorities and a special tax office provide the licence for importers of alcoholic beverages. The licence is mandatory for all importers, regardless of the products they import, i.e. there are no special licences for imports of alcoholic beverages. The wholesalers of alcoholic beverages are also required to have a licence in order to operate. Likewise, this is also a general licence for wholesaling, not a special licence for the wholesale of alcoholic beverages. The agency granting these licences functions within the Ministry of Economy and Treasury.

The off- and on-premise retailers of alcoholic beverages do not need any specific licences to operate in Spain. The situation regarding licensing policies has been much the same for the whole study period (ECAS APQ, 1999). Some municipalities have, however, begun to limit the number of outlets that sell alcoholic beverages

Restrictions of availability

Alcoholic beverages cannot be served or sold to people under 18 years in all but 4 autonomous regions (Asturias, Balearic Islands, Castilla-León and Galicia), where the limit is 16 years, according to regional laws. A national limit of 18 years is under study.

Premises are obliged to have legal regulations posted in a visible place. The norm should also apply to supermarkets and grocery stores, but the norm is very seldom followed. It seems that the age limits are quite poorly enforced in Spain in general. Since the beginning of the 1990s there has, however, been an increasing public awareness on matters concerning youth, alcohol and alcohol-related casualties, especially traffic accidents, which has led to an increasing enforcement of the legal age limits (ECAS APQ, 1999).

There are no specific business hours for sale of alcoholic beverages. Alcohol is available in both off- and on-premise establishments as long as the premises are open. There are some limitations for serving concerning special environments such as educational centres, sports venues, municipal youth clubs and health services buildings which are mostly decided by the regional governments.

The Law 10/1990 on Sports, forbids, in its article 67, introducing or consuming any type of alcoholic beverages in sports venues, for the prevention of violence in sportive events.

Since 1985, the Catalan government (Law 25/1985) has prohibited any invitation or delivery of promotional items like posters or pens with the name of an alcoholic beverage or alcohol producer to people under 16 years of age. Public promotion of alcoholic beverages through fairs and exhibitions has to be limited to specific areas, and no free tasting or delivery is allowed, nor should underage people have access to such events. By the same law alcoholic beverages containing over 23 per cent alcohol by volume were prohibited in health centres, high schools and sports centres run by public administration. The law also stipulated that alcoholic beverages should not be sold or served in social or educational centres for youth, or in the workplace for public transport.

In 1991, a modification of the former law extended the above mentioned prohibition to beverages over 20 per cent alcohol by volume, and included petrol stations and rest areas at the motorways among the forbidden areas. Vending machines for alcoholic beverages also have to be placed in closed premises, and their use is forbidden for underage people. Petrol stations and motorway rest areas have to post visible warnings: "If you have to drive, don't drink" and "Heavy drinking is the cause of many crashes".

Consumption of alcoholic beverages is also forbidden in places where sports events are taking place, like sports arenas. Catalan municipalities are allowed to put some limits on public consumption; for example, to ban public consumption on the streets and to limit the serving time in licensed public venues. Drinking promotions like "Two drinks for the price of one" are not allowed.

15 regions have laws concerning the sale, supply and consumption of alcoholic beverages. They mainly include the raising of the legal age limit for drinking, from 16 to 18 years, the prohibition of selling and consumption of alcohol in educational centres, high schools and centres for youngsters, and the regulation of selling and consumption in health centres, public administration premises, petrol stations and rest areas on motorways. The last limitations refer to alcoholic beverages above a certain alcohol content (over 18, 20 or 23 per cent alcohol by volume, depending on the

region), although some regions forbid all alcoholic beverages, disregarding the alcohol content. Most of the regional norms also include some limitations concerning the supply of vending machines in closed places.

Since 2002 the age limit for drinking has increased to 18 years, so that in 2004 only 4 of the 17 autonomous regions have a 16-year limit. The government is working for the harmonization of a limit of 18 years for sales and serving in all the Spanish territory.

Alcohol taxation

Nowadays excise duty on beer in Spain is levied in principle on all beer exceeding 0.5 per cent alcohol by volume on the basis of hectolitre per degree of Plato in the finished product (Table 16.2). However, on beer up to 1.2 per cent alcohol by volume the excise duty rate is set at zero pesetas and for beer containing over 1.2 and at most 2.8 per cent alcohol by volume the excise duty is 2.32 euro per hectolitre per degree of alcohol in the finished product. Nevertheless, according to the Brewers of Spain 2002 report, non-alcoholic beer (0 to 1° strength) pays 16% VAT as well as the other alcoholic drinks, compared with 7% VAT charged to soft drinks. Medium beer (4-5°) pays 0.09 €1 as special taxes, and the beer sector contributed, in 2002, to the state economy with 825 million euros (VAT and special taxes).

In 2002, alcoholic beverages meant an income of 809,617 thousand euros (0.12% of the GNP) (INE, 2004).

For wine the excise duty is counted per hectolitre of the product, but it has been set at zero pesetas. Also the excise duty on intermediate products is counted per hectolitre of the product, but the excise duty rate is different for beverages below or over 15 per cent alcohol by volume. The excise duty on distilled spirits is set on the basis of hectolitres of pure alcohol in the finished product. Small producers get a discount of 9 per cent of the excise duty rate. VAT is the same for all alcoholic drinks (16%)

In 2002, the excise duties for Spain were: 740 euros per Hl for spirits, 275 euros per Hl for intermediate products, zero for wine, and 177 euros per Hl for beer (World drink Trends, 2004).

Current excise duties are 0.10, for 1 litre 5° beer, 0 for 70 cl of 15° wine, 0 for 70 cl of 15° sparkling wine or champagne, 0.35 for 70 cl of 22° intermediate products, and 2.07 for 70 cl of 40° distilled beverages.

Intermediate products such as the wines produced in the regions of Moriles Montilla, Tarragona, Priorato and Terra Alta (to which alcohol has been added so that its alcohol content by volume don't increase beyond 1%) don't have excise duties.

Table 16.2. Excise duty rates for alcoholic beverages in Spain in 2000 in euro

Alcoholic beverage category*		EUR
Beer, per hectolitre per degree of Plato in the finished product**		0.77
Wine, and fermented beverages other than wine and beer, per hectolitre of the product		0.00
Intermediate products, per hectolitre of the product		
Not exceeding 15% alcohol by volume		27.50
Over 15% alcohol by volume		45.83
Distilled beverages, per hectolitre of pure alcohol in the finished product		
Yearly production at most 10 hectolitres of pure alcohol		599.57
Yearly production over 10 hectolitres of pure alcohol		685.15

* For details of the lower limits of alcoholic beverages and other EU rules concerning alcohol taxation, see Chapter 2.

** For beer over 0.5 but at most 1.2 per cent alcohol by volume the excise duty rate is zero, and for beer containing over 1.2 and at most 2.8 per cent alcohol by volume the excise duty is 2.32 euro per hectolitre per degree of alcohol in the finished product.

Source: European Commission, DG XXI, Excise duty tables, November 2000.

Before Spain entered the European Economic Community (EEC) in 1986, there had been several different taxes applied to alcoholic beverages. These included a basic tax, a luxury tax, an agrarian social security tax, provincial taxes, and in the case of distilled spirits, also a distribution tax. For instance, in the late 1970s beer had only one basic tax per litre of the product which was different for beer at or over 4.1 per cent alcohol by volume. For wine and distilled spirits there was a basic tax, a bottle tax and a luxury tax. The basic tax was counted per litre of pure alcohol in the finished product, and consisted of a national and a provincial levy. The bottle tax was set according to bottle size, in four different categories. The luxury tax was set at 25 per cent of the retail price for the first 350 pesetas, plus 40 per cent of the retail price over 350 pesetas. The upper limit for the luxury tax was 60 pesetas. In the late 1970s there was no value added tax (VAT) in Spain. Counted per centilitre of pure alcohol, and taking all special taxes together, the tax burden on table wine was 4.4 times and that on fortified wine 5.0 times the tax burden on beer. The special taxes on domestic brandy were 3.6 times and those on imported whisky 7.6 times the tax on beer (Brown & Wallace, 1980). Furthermore, until November 1980 the prices were regulated by the Government (Brown, Dewar & Wallace, 1982).

In the early 1980s, alcohol taxes consisted of a special tax, a distribution tax or a bottle tax and a luxury tax, as well as a social security tax. Because of the complexity of the tax system, it is difficult to make precise comparisons of the tax burden between different beverage categories as well as between different beverage classes inside the beverage categories. Compared to the late 1970s, there had, however, been major changes in the relative tax burden between different beverage categories. The main reason was that wine was freed from all other special taxes besides the social security tax. The tax on one centilitre of pure alcohol in the form of ordinary wine was then only 30 per cent of the tax on beer, and alcohol in a better quality wine was taxed at the same rate as alcohol in beer. Taxes on inexpensive brandy were two times and on quality

spirits five times the tax on beer (Brown, Dewar & Wallace, 1982). This tax structure was in force until 1986 (see Horgan, Sparrow & Brazeau, 1986, 351-354). Before the change in the tax system, all special taxes together accounted for 5 per cent of the price of wine, 13 per cent of the price of beer and 25 per cent of the price of distilled spirits.

In 1986, all the earlier special taxes on alcoholic beverages were replaced with an excise duty and a VAT. The excise duty rate for beer was established on the basis of hectolitres of the product and for distilled spirits on the basis of hectolitres of pure alcohol in the finished product. Wine was completely exempted from excise duties. Alcohol excise duty rates were increased annually until 1989, and then remained unchanged until 1993.

In January 1988, the excise duty rate for beer was 476 pesetas per hectolitre of the product and on distilled spirits 66,000 pesetas per hectolitre of pure alcohol in the finished product. Taking into account the VAT, the relative tax burden between wine, beer and distilled spirits was 0.8 to 1.0 to 2.3. At that time 11 per cent of wine prices consisted of taxes. The corresponding rate was 15 per cent for beer and 47 per cent for distilled spirits (Sparrow et al., 1989).

In March 1989, the excise duty rate for distilled spirits was increased to 72,600 pesetas per hectolitre of pure alcohol in the finished product. For beer the excise duty rate was differentiated according to the strength of beer. For beer less than 11 degrees of Plato the excise duty rate was 356 pesetas per hectolitre of the product, for beer from 11 to 13.5 degrees of Plato it was 502 pesetas, and for beer over 13.5 degrees of Plato it was 713 pesetas per hectolitre of the product. Taking into account the VAT, the relative tax burden per litre of pure alcohol in the finished product between wine, beer and distilled spirits was 1.0 to 1.0 to 2.0. At that time 11 per cent of wine prices constituted of taxes. The corresponding rate was 13 per cent for beer and 34 per cent for distilled spirits (Brazeau et al., 1992).

The tax system was revised in 1993 to meet the requirements of the European Union (EU) for the harmonisation of alcohol excise duties. All types of wine were brought into the excise duty system at a zero tax rate. On beer and distilled spirits, the excise duty rates were set at the EU minimum rates, which in practice meant that the excise duty rate for distilled spirits was not changed whereas the excise duty rate for beer doubled. Since 1993, excise duty rates for alcoholic beverages have increased somewhat in Spain. The small increases concerning beer and intermediate products in terms of pesetas have only meant that the excise duty rates for these beverages have been kept constant in terms of euro. With regard to distilled spirits, the excise duty rate increased in July 1996 in terms of the euro by about 25 per cent. Since then, the excise duty rates for all alcoholic beverages have been kept constant (European Commission, DG XXI, Excise duty tables January 1994 - November 2000). Taking into account the VAT, the relative tax burden per litre of pure alcohol in the finished product was in 1996 between wine, beer and distilled spirits 0.9 to 1.0 to 1.7. At that time 14 per cent of wine prices constituted of taxes. The corresponding rate was 20 per cent for beer and 55 per cent for distilled spirits (Hurst, Gregory & Gussman, 1997)

In 1986 the VAT rate for alcoholic beverages was the general VAT rate of 12 per cent. In January 1992 it was raised to 13 per cent and in August 1992 to 15 per cent. In

January 1995 the VAT was increased to the current level of 16 per cent (Hurst, Gregory & Gussman, 1997; European Commission, DG XXI, Excise duty tables, November 2000).

The changes in excise duty levels referred to above are given in nominal values. During the 1950-2000 period the value of the Spanish currency has decreased because of inflation. The increase in the general price level in Spain in the 1960-2000 period as described by the consumer price index (CPI) is given in table 16.3.

Table 16.3. Consumer price index in Spain, 1960-2000, 1995 is 100

Year	1960	1965	1970	1975	1980	1985	1990	1995	2000
CPI	4.3	6.0	7.7	13.6	31.9	56.8	77.8	100.0	113.8

Source: OECD, Main Economic Indicators, March 2000 CD-ROM.

From a baseline of CPI = 100 in 2001, consumers price index increased 3.5% in 2002 and 3.0% in 2003 (Min. Econ. Hacienda, Subdirección General de Análisis Macroeconómico, Informe coyuntura económica 2004). Interannual tax of the index of consumption prices was of 5.7% in 2003. Mean annual CIP for alcohol was 103,353 (106,089 for spirits; 101,183 for wines; 105,065 for beers).

When relating changes in alcohol taxation to developments in the CPI, it can be concluded that the real burden of special taxes on alcoholic beverages increased for beer but decreased for wine and distilled spirits from the late 1970s to the year 1996. When counting the excise duties and the VAT together, it is clear that the real burden of alcohol taxes increased in 1996 because of the introduction of the VAT of 12 per cent, which affected especially the real tax burden on beer and inexpensive wines. In the late 1980s and early 1990s the excise duty rates for beer and distilled spirits decreased in real terms by a fourth. In 1993 the excise duty rate for beer doubled in real terms, but has since then stayed stable in real terms. The excise duty rate for distilled spirits remained the same in 1993, but has increased since then by a fourth in real terms. The spirits sector claims that 80% of all taxes imposed on alcohol are on account of spirits while they only represent 30% of the market, and that Spaniards pay 17.65% more taxes for spirits than the European average, taking into account their average income (article by D Gracias in *Expansión*).

Altogether, taxes revenue on account of alcoholic beverages meant the following income (in absolut value in thousands of euros, and GDP):

year 2000: value 755,349 €- GNP 0.12%

year 2001: value 778,534 - GNP 0.12%

year 2002: value 809,617 – GNP 0.12%

According to the data collected in the ECAS project, the real price of alcoholic beverages stayed about the same in the second half of the 1960s and increased some 10 per cent at the beginning of the 1970s. In the mid-1970s and early 1980s the real price of alcoholic beverages was decreasing. In the mid-1980s it was about 25 per cent lower than in the mid-1970s (Leppänen, 1999). According to these data, the real price of alcoholic beverages increased by about 15 per cent in the second half of the 1980s

which seems to be contrary to the fact that at the same time the excise duties on alcoholic beverages were decreasing. However, it has to be remembered that developments in alcohol prices are only partially dependent of developments in alcohol taxes.

Alcohol advertising

In 1976 a code for television advertising was adopted by the Commission for Control of Television Advertising. The code does not appear to have distinguished between different types of alcoholic beverages, although advertisements of alcoholic beverages must clearly show the alcoholic strength of the beverage in percentage of alcohol by the volume. The code prohibits advertising of alcoholic beverages in association with, or close to, programmes for young people. Nor may advertisements for alcoholic beverages in any way imply that drinking alcohol has heroic or romantic associations. Furthermore, advertisements for alcoholic beverages must not occur in association with sports activities or be associated with sports programmes (Davies & Walsh, 1983).

In 1988 and 1990, the laws regarding control of alcohol advertising were slightly tightened. Two new laws were put in place to govern alcohol advertising, namely the General Advertising Law of 1988 and the Television Advertising Resolution, which states that advertising of alcoholic beverages containing over 20 per cent alcohol by volume is forbidden on broadcast media (ECAS APQ, 1999).

The Law 34/1988 (art. 8.1) forbids the publicity of alcoholic beverages above 20° in TV. The mixers and the corporate advertising is a matter of discussion and interpretation on their legitimacy. Article 8.5 forbids advertising where sale or consumption are forbidden. This has allowed claims on otherwise legal publicity. Alcoholic drinks with a strength below 20° can be also be forbidden in certain circumstances, but the corresponding regulation has never been developed. Art. 11 establishes the obligation of separating the informative content of the marketing one, what should prevent the covert publicity in any media.

Certain regions have further imposed an independent ban on all television advertising of alcoholic beverages, and the Basque region, Catalonia and Galicia have autonomous advertising regulations (Hurst, Gregory & Gussman, 1997). Before 1990, advertising of alcoholic beverages exceeding 23 per cent alcohol by volume was forbidden on broadcast media. Advertising of those beverages was also forbidden by Catalan Law 25/1985 on streets, highways and in parks as well as in movie halls or public transportation vehicles, but indirect publicity via sponsored sports broadcasting is still allowed. In 1991, the prohibition included all beverages over 20 per cent alcohol by volume. In addition, advertising of alcoholic beverages is not permitted before 9.30 p.m. (ECAS APQ, 1999).

The Law 25/1994, modified by the Law 22/1999, included the EEC Directive 89/552, on radio and television broadcasting, where article 11 limits the publicity of alcoholic beverages (target and content of the messages). Direct or indirect publicity and all telemarketing of alcoholic beverages above 20° is prohibited. Product placement is not illegal, unless it's considered publicity according to the law. Therefore, product

placement has no regulation. Sponsorship is also allowed. Anyway, the Law 25/1994 forbids, in its article 15.2, the sponsorship of TV programmes by bodies whose main activity is producing or selling products the publicity of which is banned.

The advertising of the allowed alcoholic beverages (< 20°) have some limitations in its messages (not aimed at minors, not be linked to sexual or social success, to sports performance...) and can't portray minors

According to Catalan Law 10/1991, advertisements for alcoholic beverages above 20 per cent alcohol by volume are forbidden in all official media (e.g. Catalan TV) and publicity of those under 20° cannot be addressed to youngsters and cannot be associated with social or sexual success or therapeutic effects. Moderation cannot be discredited nor heavy drinking admired. Alcoholic beverage advertising is not allowed in cinemas showing films directed to people under 18 years of age. Outdoor advertising of beer and wine is permitted Alcoholic drinks above 23° can't be advertised on the streets, nor in stadiums or sports centres, but in case of billboards or sponsorship. Images related to sponsorship are not forbidden.

Some autonomous regions have narrowed the national limitations on alcohol advertising, mainly those referred to the prohibition of outdoors advertising, radio and TV advertising during given hours of the day, advertising in youth magazines, and the sponsorship of sports events.

The Spanish Brewers Association signed a self-regulation code in 1995. The code requires members to include a responsible consumption message in all commercial communications. The code also covers abuse, youngsters and consumption in the workplace. The Spanish Advertisers' Association's Code for the Self-Regulation of the Advertising of Alcoholic Drinks was adopted in 1996 by the Spanish Federation of Drinks Producers. The Code promotes the benefits of moderate drinking, but recognises the potential for alcohol misuse. The code covers alcoholic beverage advertising and young people, driving, health, work, social behaviour, alcoholic strength and sport (Hurst, Gregory & Gussman, 1997).

Education and information

There is no systematic approach regarding alcohol education and information in Spain, although school education is promoted and there is a wide coverage of educational programmes. The General State Health Planning Office has a service to promote healthy habits as it is in charge of the prevention and education programmes for health aimed at the reduction of alcohol consumption (Moser, 1992). In addition to this the Bureau of Drug Addiction promotes some mass media campaigns and has published some prevention materials (ECAS APQ, 1999). In 2003, the campaign launched by the Ministry of Health was "Alcohol sends the bill". The National Plan on Drugs has edited, besides prevention programmes, several support materials (guidelines, principles, etc.) to support school teachers.

The autonomous programmes on substance abuse of each region have different priorities. Some of them do not put any emphasis on alcohol-related matters, while

others have started strong cooperation in this respect with the Ministry of Education. In Catalonia, for instance, this has led to specific materials for primary education in the frame of the Education for Health issue. Over the study period, and especially in the past decade, there has been a growing concern amongst teachers about the fact that alcoholic beverages are more than before regarded as drugs and not as nutrition (ECAS APQ, 1999).

Drunk driving

Drunk driving is a major concern in Spain. Spanish authorities estimate that at the beginning of the 1990s some 30 to 50 per cent of road accidents were caused by alcohol (Hurst, Gregory & Gussman, 1997). The blood alcohol concentration (BAC) level defined as drunk driving was 0.08 per cent until 1998 (ECAS APQ, 1999). For drivers of vehicles weighing more than 3,500 kg, the BAC limit was 0.05 per cent, and for public service drivers, as well as for drivers of dangerous merchandise, emergency services, schoolchildren and minors and special services, the level was 0.03 per cent.

In 1999 the enforcement of Real Decreto 2282/1998, de 23 de Octubre, reduced the legal BAC level to 0.05 per cent, in accordance with most of the EU countries. For novice drivers and professionals the limit is at 0.03 per cent (ECAS APQ, 1999). Last modification of the General Driving Regulation (Real Decreto 1428/2003), established a limit of 0.03% for drivers of emergency transport.

Random breath tests are also performed. In the case of traffic accidents breath tests are compulsory. If the BAC level is higher than 0.05 per cent, the driver must leave the vehicle and remain in the custody of the police until the BAC level has dropped below the legal limit. Blood tests can be requested by individuals failing a breathalyser test, or can be ordered by a judge in the event of an accident. Refusal of breath tests may be punished with are imposed for impaired driving (ECAS APQ, 1999). The new Penal Code modified by the Ley Orgánica de 10 de diciembre 15/2003, and enforced from October 1st 2004, establishes that a driver *can* be sent to prison just because of driving under the effects (mostly 3-6 months), or a fine of 6-12 months. It's up to the judge to decide between jail or fine (550 to 110.00 euros). Mostly no prison sentence is written below a BAC of 0.1%. In any case, there is a licence withdrawal (1-4 years). The intoxicated driver can also be fined with 31-91 days of services for the community. Police agents are recommended to start a penal process in case from 0.7 mg alcohol / litre breath.. The most common penalty is, however, to suspend the driving licence for some months. No alternative measures like treatment are provided yet (ECAS APQ, 1999). Reckless driving is considered a crime penalised with up to 4 years prison and up to 10 year license withdrawal. A Special Plan on Traffic Safety for 2004 has been launched and a draft law project on penalties points has been approved by the government (Council of Ministers of October 15 th 2004). Drunk driving will cost 6 of the 12 given points (8 for novice drivers).

According to the General Regulations for Drivers (Reglamento General de Conductores, Decreto 772/1997 de 30 de Mayo), driving licence cannot be granted to people with alcohol abuse or dependence. Medical check-ups, which have to be

performed every time a licence is either granted or renewed, are in the future going to include a specific screening for alcohol- and other drug-related problems.

Administrative structure of treatment for alcoholism

As early as in the 1960s, the Spanish Government set up eight specialised centres to treat alcoholism in different cities of Spain, for instance in Barcelona, Bilbao, Madrid, Seville and Valencia. Before this, only psychiatric hospitals took care of persons with severe alcohol problems (ECAS APQ, 1999). In the early 1980s, several regional programmes offered a network of centres for alcoholic patients. The Bureau of Alcoholism and Drug Addiction could be seen as a major change in the treatment of drug addicts. Despite its focus being primarily on opiate addicts, alcohol problems have become a main target for the new edition of the national plan.

There is a broad network of services for inpatient and outpatient treatment for people with alcohol problems, many of them linked with mental health services. Only the most severe cases of dependence, physical damage or psychiatric complications are admitted to hospitals. About 80 per cent of the patients are treated through outpatient services (Moser, 1992).

The most widespread system of specialised treatment is organised on an outpatient basis through 70 anti-alcohol dispensaries or mental health centres for alcoholic and drug-dependent people. Some outpatient consultation services have been established in mental hospitals. The social security system provides treatment for alcoholics through about 500 neuropsychiatric consultation services in the medically specialised outpatient departments or in "zone consultations", which are held for two hours a day, on referral by a general practitioner (Moser, 1992)

There are a few specialised inpatient services for alcoholics in university general hospitals, but most inpatient care is given in mental hospitals, where 4 to 5 per cent of the beds are occupied by alcoholic patients, although 25 per cent of psychiatric admissions are for alcoholism. In some regions, an important part in treatment and rehabilitation is played by the self-help organisations. Subsidies for their work are provided through the social services (Moser, 1992).

The General Health Law has proposed the establishment of health areas and zones with new health centres and basic teams to provide primary health care. According to a primary health reform document, these teams should manage some mental health problems and improve early detection and intervention of, for example, alcohol and drug problems. They would be supported by specialised mental health teams, and would have the collaboration of the social services and other professional workers in the community.

Some attention is paid to the families of excessive drinkers through certain outpatient alcoholism services, the social services and voluntary organisations (Moser, 1992). Most treatment programmes include some attention provided to the family. A preventive programme (ALFIL Programme, psycho-educational groups for children of

alcoholics) was launched in 1996 by the scientific society Socidrogalcohol, with the sponsorship of the bureau of alcoholism and drug addiction.

Every autonomous region has a different model regarding treatment for alcoholism. A general principle is that most treatment centres in the regions are funded by the regional programme on substance abuse. Usually patients are treated in the drugs network, which is sometimes organised independently, sometimes included in public health services and sometimes forms part of the mental health services (ECAS APQ, 1999).

Since the 90s, the Spanish Society of Family and Community Medicine promoted identification and brief counselling in Primary Health Care, including them in their Prevention Activities Programme. In the 2000s, the Catalan government is promoting the *Drink less programme* for at risk drinkers to be delivered by trained primary care physicians. The Public Health Agency of Barcelona has performed an effectiveness study on brief intervention in trauma emergencies and starts the implementation of brief counselling at the emergency setting.

Summary

Spain belongs to those countries which at the beginning of the 1950s did not have any comprehensive preventive alcohol policy. Nor can one claim that Spain even nowadays has a comprehensive alcohol control system. Still, during the last fifty years some alcohol control measures have been introduced, and nowadays the BAC limit is down to 0.05 per cent for all drivers, and even lower for some special groups of drivers. Also, alcohol advertising is controlled both with statutory rules and voluntary codes.

It is estimated that at the beginning of the 1950s, total alcohol consumption in Spain was about 8 litres per capita, in any case less than 110 litres per capita. Since then the total alcohol consumption increased and peaked in 1975, when it reached a level of 14 litres. During the last two and half decades the total alcohol consumption has been on the decrease, and by 2000 it had come down to 10 litres per capita. Spain belongs to the wine drinking countries. However, nowadays wine accounts for about 45 per cent of the total alcohol consumption. Beer is the beverage which has most clearly increased its proportion of the total alcohol consumption, from a few per cent at the beginning of the 1950s to 30 per cent in the late 1990s. Also the proportion of distilled spirits of the total alcohol consumption has increased from one fifth in the first half of the 1960s to one fourth in the late 1990s.

As with other Mediterranean countries, the decrease in wine consumption cannot be explained by stricter alcohol control measures. The increase in alcohol excise duty rates in real terms could be offered as an explanation for the developments in alcohol consumption in the 1990s, but it is not even sure that the increase in the real tax burden of alcoholic beverages has passed to alcohol prices as real prices of alcoholic beverages today seem to be on the same level they were some two to three decades ago. One explanation for this is that even if the tax burden on alcoholic beverages has increased alcohol excise duties are still on a very low level.

Like in some other countries with no comprehensive preventive alcohol policies at the beginning of the 1950s, increased drinking by youngsters, as well as drunk driving, has increased public awareness on alcohol issues. It is to be seen if this trend will continue and if so, what kind of alcohol control measures will be implemented in the future.

The Minister of Health of the new government (2004) is drawing the new working lines concerning the drug problem, which have to be based on consensus, give priorities to the youngsters and to prevention, increasing collaboration with teachers and parents. Youth consumption and bingeing is a matter of big concern and the legal age limit for drinking will be harmonized at 18 years.

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