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Sweden

Exporter Guide

Annual

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Report Highlights:
Due to severe Nordic winters and its relatively short growing season, Sweden relies heavily on imported food and agricultural products. There are opportunities for high-value products, products which are not produced domestically and new-to-market products, including ethnic and "healthy" food and drink products.

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SECTION I. MARKET OVERVIEW

Due to the severe Nordic winters and relatively short growing season, Sweden relies heavily on imported food and agricultural products. In 2009, imports of agricultural and food products totaled SEK 93 billion (USD 14 billion) and accounted for 10 percent of the Swedish total import value. About 62% of the imports come from other EU countries, Norway, Denmark, Germany and The Netherlands being the main exporters. Sweden has been a member of the European Union (EU) since 1995, but has not joined the European Monetary Union (EMU).

Food retail sales held up much better than expected in 2009. After a decrease in 2008, consumption of food and drink products is increasing again, 0.9% by volume in 2009. Swedish total food retail sales rose by 4.3% to SEK 251 billion (USD 38 billion).

Sweden was hit hard by the international financial crisis in 2008 but the Swedish economy is on the road to recovery. Swedish exports have surged and rising household consumption and business investments are helping to strengthen the economy. According to a new report from the National Institute of Economic Research, expected growth in 2010 is 4.3 percent, 3.4 percent in 2011 and 3.0 percent in 2012. However, despite vigorous growth, unemployment will remain high in the next few years.

Table: Selected Indicators
Annual percentage change and percent, respectively

	2009	2010	2011	2012
GDP at market prices	–5.1	4.3	3.4	3.0
Real GNI per capita	–7.2	2.6	3.0	2.5
Employment	-2.3	1.0	1.1	1.0
Unemployment	8.4	8.5	8.2	8.0

Sources: Statistics Sweden, National Mediation Office and NIER.

Swedish consumers are gravitating towards fresher, more convenient and more nutritious foods. High demands are made on food quality, origin and environmental concerns. Quality is now associated with assurances or production conditions, which range from the use of fertilizers and pesticides to animal welfare and environmental concerns. There is a growing taste for organic products. Consumers are willing and able to pay higher prices for food and drink products that fall into these categories.

Advantages	Challenges

Sophisticated market. High acceptance of new products and concepts. U.S. products are considered high quality and trendy.	U.S. products are at a price disadvantage compared to competitors based in the European Union.
Growing consumer demands for value-added products, convenience foods and functional foods. Proliferation of "healthy" and "greener" foods.	Strong hesitations with respect to genetically modified products
Location gives access to a Nordic/Baltic market comprising 25 million consumers.	No access for hormone treated beef from the U.S.
High standard of living, well educated workforce, growing incomes. English is widely spoken.	High distribution and shipping costs.
Favorable dollar exchange rate	

Trends in Imports from the United States of Consumer-Oriented Agricultural Fish & Seafood Products

Product Category	**2009 US Exports to Sweden $1,000**	**Growth 2008-2009**
Processed fruits & vegetables	35,817	0.90
Tree Nuts	14,534	-18.45
Wine & Beer	14,258	-7.02
Other consumer oriented	10,840	5.33
Hardwood lumber	7,774	-13.69
Other Value-Added Wood Products	7,387	116.48
Other Intermediate Products	7,080	-8.94
Other Edible Fish & Seafood	6,849	39.58
Live Animals	6,668	-7.60
Logs and Chips	4,624	-24.60
Fresh Fruit	4,012	-24.92
Roe & Urchin	2,984	24.33
Panel Products	2,958	-32.69
Snack Foods	2,904	9.97
Rice	2,074	46.10
Eggs & Products	1,937	97.42
Vegetable Oils	1,125	1.70
Salmon whole	1,111	-39.62
Total Ag Fish & Forest Products	**145,878**	**-5.64**

SECTION II. EXPORTER BUSINESS TIPS

Local Business Practices and Customs

Swedish firms do not change suppliers readily, and many commercial relationships have been built up and maintained over decades. While this is beneficial to exporters who have a partner, newcomers must be willing to invest effort in developing an entry into this market and securing the confidence of commercial buyers. A Swedish buyer will expect total commitment to prompt deliveries, precision in filling of orders and high quality for all kinds of products. Being punctual is not only regarded as a sign of respect, but also efficiency. Swedish businessmen will have little understanding for cultural variation in punctuality.

Market entry strategies for U.S. food products should include:

1. Market research in order to assess product opportunities.

2. Advance calculation of the landed cost of a product in order to make price comparisons vis-a-vis competitors.

3. Identifying an experienced distributor or independent reliable agent with strategic distribution channels to advise on import duties, sanitary regulations, and labeling requirements. It is advisable to initiate personal contact in order to discuss marketing matters such as funding for advertising, slotting allowance, in-store promotions and tasting events. Suppliers may also want to consider trade fair participation to raise awareness of their products.

4. Exploration of the purchasing arrangements of the larger retail chains.

General Consumer Tastes and Preferences

Convenience: Swedes are embracing value-added products and convenience foods. In-store eating and take-away is growing. The ongoing socio-demographic changes with busier life styles and increasing single-person households are affecting food retailing to a high degree. Retailers are shifting their product ranges towards an increasing share of healthier, ready-to-eat foods and home meal replacements. Lifestyle changes also significantly influence the catering sector. In Sweden about 20 percent of meals are currently eaten outside of the home.

Health: Hand-in-hand with the demand for convenience goes the heightened consumer concern for food safety and healthy eating habits. Demand is rising for "natural" and "healthy" food and drink products. Also, products with nutritional advantages, such as added fiber, vitamins and minerals are gaining in popularity. The environmental or "green" philosophy is an important factor in consumer decisions. Swedes are willing and able to pay higher prices for food and drink products perceived to meet their environmental and health concerns.

Organic: Consumer interest in organic food products has been increasing rapidly in Sweden. While growing demand for healthier, "greener" and more convenient products is one of the major driving forces behind the evolution of the food industry, organic and health-oriented products still have a relatively small market share in Sweden. In 2009, sales of organic products increased by 18% and had a share of about 3.1% of the total food market. The variety and availability of processed organic products is still much more limited than that found in the United States.

Vegetarian: The trend towards vegetarian choices is a growing one. More processed products which link convenience to the vegetarian alternative are appearing in retail outlets but are still limited in variety.

Ethnic Foods: Swedish consumers are moving away from their culinary traditions as they become more open to new and exotic cuisine. A growing immigrant population and extensive travel abroad are the main reasons behind this trend.

Food Standards and Regulations

Sweden has been a member of the European Union since 1995 and has adopted EU practices related to imports of agricultural products. Agricultural products are subject to the standard EU import licensing system, quotas, import duties and other provisions. It is important to note that these markets are fully open to competitors within the EU, while U.S. exporters face EU import restrictions.

Food safety standards in these markets are very strict and imported foodstuffs must meet specified requirements.

Swedish national food legislation is, to a large extent, harmonized with the EU's food legislation. In certain cases, however, there is room for national interpretation of the EU's legislation. Sweden applies more restrictive legislation with regard to pesticides and irradiation, under the umbrella of public health precautions. In addition, Sweden has received a derogation allowing it to apply stricter salmonella control and stricter border controls (quarantine on imports of live animals) than that of other EU member countries.

Sweden applies EU maximum residue levels with regard to dioxin. Due to the relatively high dioxin levels in fish from the Baltic Sea, however, Sweden (and Finland) has received a derogation allowing fish with dioxin levels exceeding the EU thresholds to be sold in Sweden under the condition that they are not exported to other EU countries. This exception will remain until 2011. During 2011, the Swedish government will decide whether to apply for a new derogation. Its decision will be based on an investigation led by the National Food Administration.

For more information regarding food standards and regulations, please refer to USEU FAIRS Report and Sweden FAIRS Report available on the Foreign Agricultural Service web page at: http://www.fas.usda.gov

Import and Inspection Procedures

Sweden has strict sanitary and phytosanitary requirements for foods. Laboratories have sophisticated capabilities to monitor product quality. Detailed regulations apply to the importation of agricultural products into these markets. It is therefore most important that the U.S. exporter work closely with the importer to make sure that the products destined for this market are in full conformity with the country's food safety, quality and labeling rules and regulations.

Please note that all foodstuffs sold in Sweden must be labeled in Swedish. Many products intended for wide distribution in the region are labeled in multiple languages such as Swedish, Norwegian, Danish, Finnish and English.

For more information regarding import and inspection procedures, please refer to USEU FAIRS Report and Sweden FAIRS Report available on the Foreign Agricultural Service web page at: http://www.fas.usda.gov

SECTION III. MARKET SECTOR STRUCTURE AND TRENDS

Retail

In the past few years, a Nordic consolidation and integration has clearly been seen as mergers between the Nordic retailers have been implemented. At the same time, the Nordic countries have increasingly become part of the European retail market as foreign companies and chains are moving in.

Retailers are facing stronger competition from fast food chains, lunch restaurants, and other service establishments. During the past decade, sales within the restaurant sector have increased faster than in the retail sector. Eating out has come to include both weekdays and weekends. Nevertheless, Swedes still spend the bulk of their food dollar in retail stores rather than eating out.

General discount stores, hypermarkets and large supermarkets are experiencing rising sales volumes, while small and medium-sized stores lag behind. Elements of the restructuring of the sector include the on-going move toward vertical integration, the increasingly common use of exclusive contracts, consolidation of purchasing and deliveries and the growth of private labels. Supermarkets are responding to demands for an ever-widening list of products and product formats. Large supermarkets and hypermarkets account for about 75 percent of the Swedish retail food sales.

Distribution: The wholesale and retail food market in Sweden is dominated by four groups, Ica, Coop, Axfood and Bergendahls, which together account for over 90 percent of the commodity retail market. These Nordic chains have closely knit wholesale and retail arrangements comprising a compact and efficient goods delivery system and a nationwide network of retail shops as well as department stores and supermarkets. Some also have hotel, restaurant, and catering services. This centralized system provides economies of scale, facilitating the distribution and import of larger volumes.

Independent importers and distributors: There are a number of importers and distributors in Sweden specialized in certain product segments, such as organic products or ethnic foods. These importers/distributors in turn sell to the large retail chains. These importers are ideal for exporters who cannot meet the high volumes required by the large retailers when dealing with them directly. Some specialized importers also supply the Hotel Restaurant and Institutional (HRI) sector.

Alcoholic Beverages: In Sweden, the government-owned Systembolaget retains a monopoly on retail sale of all wines, spirits, and strong beers. As a result of accession to the EU, Vin & Sprit lost its monopoly control of import and wholesale distribution channels, and is now working as a licensed importer along with about 150 other independent licensed importers of wine and liquor. Also, restaurants may buy from importers or import directly provided that they have a license.

Trends

Store size: Smaller stores continue to lose market share to the larger supermarkets and hypermarkets.

Discount stores: In the past few years, there has been a dramatic increase in low-price food stores in Sweden. The large Nordic retail chains have developed discount store concepts in order to meet the increased competition from European discount chains such as German Lidl and Danish Netto which entered the market a few years ago.

Organic Products: Even though the market share for organic products in general is still a modest 3.4 percent in Sweden, organics have made important in-roads for certain commodities such as eggs and bananas. For these products, organics enjoy a market share of around 17 percent.

The major retailers in Sweden are actively promoting organic products. Their own organic labels have gained broad recognition. The retail chains' comprehensive coverage of the whole country, combined with their vertically integrated structure (often imports, wholesale and retail trade are carried out within the same company), makes Sweden an interesting market for U.S. exporters seeking long-term stable and predictable sales. The shift towards more private-label brands will probably strengthen the major Swedish retail chains' willingness to compete not only with price (which would be rather difficult) but also through identification of their products with environmental benefits. This development is being hastened by the fact that recently some European discount price retailers (e.g. the German retail chain LIDL) have either established themselves on the Swedish market, or announced their interest in doing so in the near future.

Private Label: Retailers are aggressively promoting their own private label brands through TV commercials and newspaper ads. Two of the largest Swedish retailers have set a goal of 25 percent market share in each product segment for their private label products. This is especially true for far-away-imported products. For some popular categories in retail stores the figure is 50 percent. This development portends good potential for suppliers with private label capacity.

Convenience shopping: As the consumers increasingly eat outside their homes, the large retailers find themselves not only to be competing with each other, but also with the HRI sector. To face this new competitor, supermarkets have developed deli sections in their stores with either ready-to-eat food products or partially cooked dishes. Menu suggestions next to the food products are also popular. The display of products has also become more consumer-oriented. For example, dressings and bread croutons can be found next to the pre-mixed salads, and coffee cakes may be placed next to the coffee section. Manufacturers with the capability to supply convenience foods may find interesting opportunities in this market.

Promotions/Marketing: Direct marketing in the form of newspaper-format advertisements is one of the most regularly used forms of communication in the Swedish retail market, and almost all the retail groups use this method as a means of conveying information to consumers. These are sent on a weekly basis to all the households in the immediate marketing area of the individual stores. The retailers also invest in advertising, primarily through their newspaper flyers, while producers and manufacturers spend most of their budgets on television advertising. Retail chains are also promoting their own private label products aggressively through TV commercials and advertisements.

Internet sales: Even though the computer/IT penetration in the Nordic countries is exceptionally high, retail food sales on the web have been very limited. The positive outlook that the large retailers had at the end of 1990's regarding selling via Internet changed rather quickly. Retail chains Ica, Coop and Axfood all terminated their Internet grocery web sites due to few customers and low profitability, Axfood and Coop in 2001 and ICA in 2003. However, the industry believes that customers have overcome earlier suspicions to online food purchases and retailers have again started to offer food online in cities around Sweden.

Please see the most recent GAIN Retail Report (SW8013) for Sweden further information regarding the food retail sector.

HRI/Food Service

The recent economic slowdown has been having an increasingly deep impact on the hotel and restaurant sector. Year 2009 was weak, the total turnover for the restaurant sector grew by 0.6% to SEK 71 billion (USD 11 billion). Fast food restaurants increased their turnover by 4.1% while other restaurants made a loss.

At the same time, the Swedes have never been eating out as much, spending about the same as in other European countries. Possible reasons are that Swedes travel more and the increased number of restaurants and the varieties of restaurants. In addition, eating out on weekdays has become very common among the younger generation.

Changes in lifestyles and tastes are having significant effects on the catering sector of the market. The health trend continues to be important and restaurants are increasingly offering healthy alternatives on their menu. Fast food outlets often belong to national and international chains, while restaurants are most frequently family businesses. There are, however, some large international restaurant chains operating in this market including TGI Friday's and Subway. Also, there has been a significant expansion of coffee shop chains in the past few years. Institutions are mainly operated by municipalities, counties and government agencies.

From 1993-2009 the number of restaurant businesses in Sweden has increased by around 4,748 outlets from 13,600 to about 18,987. At the same time, the number of stores in the retail sector has been decreasing.

Distribution: Distribution within the HRI sector is dominated by a few large wholesalers specialized in supplying this sector. The dominant wholesalers are: Servera, Menigo Foodservice, Martin Olsson, Servicegrossisterna and Axfood Närlivs.

Trends:

- Outside the home, restaurants continue to attract a significant proportion of consumers.
- American trends remain popular in Sweden.
- Informal, less expensive, "fast food" outlets continue to be popular. McDonald's, Burger King, and Pizza Hut all have strong positions in this market.
- Increase interest in gourmet restaurants.
- Other U.S. chains such as Subway, TGI Friday's and Hard Rock Cafe can be found in Sweden.

Food Processing

The small populations of the Nordic countries provide somewhat limited foundations for a highly diversified food processing industry with sufficient economies of scale. Consequently, there have been consolidations of several companies and an increasing emphasis on exports of processed food items - especially cheese, candy, snack food and various jams and preserves. Since EU membership, there has been a move toward mutual investment and consolidation among Swedish food industries and joint Nordic cooperation in general. Several companies own and operate food manufacturing firms abroad.

The food processing industry in Sweden is large-scale and dominated by a few large private and cooperatively owned companies. Five large suppliers account for about 50 percent of the retail food store purchases. One or two suppliers control close to 100 percent of the market within some food segments. Farm cooperatives are powerful in Sweden's food industry. They have a virtual monopoly on domestically produced dairy products and are market leaders in the meat, milling, and bakery sectors. However, the majority of food industry companies are privately owned. These companies are active in the brewing, prepared fish, frozen food, sugar and tobacco sectors. The domestic food processing industry accounts for 80 percent of the food consumed within Sweden, which makes this an important sector for ingredient and raw product suppliers. Food processors either source their raw materials or ingredients directly from their suppliers or through wholesalers.

In 2009, imports of agricultural products and foodstuffs to Sweden totaled SEK 93 billion (USD 14 billion), an increase by 6 percent from 2008. Sweden's foodstuff exports totaled SEK 50 billion (USD 7 billion).

Imports destined for the food processing sector include vegetables, fruit, juice, coffee, and cocoa as well as seafood. About 40 percent of all imports are products that cannot be grown in Sweden.

Dominant companies by sector are: Arla Foods (dairy), Swedish Meats (meat processing), Paagens (bakery), Cerealia (milling and bakery), Findus (fish processing), Löfbergs Lila (coffee roasting).

SECTION IV. BEST HIGH-VALUE PRODUCT PROSPECTS

- Authentic barbeque sauces and seasonings
- Beer
- Confectionery
- Convenience foods
- Dried fruit
- Ethnic food
- Fresh fruit
- Frozen vegetables
- Organic products
- Pancake/cake mixes
- Pet food
- Processed fruits & vegetables
- Rice and rice mixes
- Sauces
- Seafood
- Snack food
- Sugar-free products
- Tree Nuts
- Vegetarian processed products
- Wines

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

Foreign Agricultural Service
American Embassy
Dag Hammarskjolds Vag 31
S-115 89 STOCKHOLM, Sweden
Tel: (46-8) 783 5392/5470
Fax: (46-8) 662 8495
E-mail: agstockholm@usda.gov
http://stockholm.usembassy.gov/fas.html

Swedish Board of Agriculture
S-551 82 JONKOPING, Sweden
Tel: (46-36) 15 50 00
Fax: (46-36) 19 05 46
E-mail: jordbruksverket@jordbruksverket.se
www.sjv.se

National Food Administration
Box 622
S-751 26 UPPSALA, Sweden
Tel: (46-18) 17 55 00
Fax: (46-18) 10 58 48
Email: livsmedelsverket@slv.se
www.slv.se

National Board of Fisheries
Box 423
S-401 26 GOTEBORG, Sweden
Tel: (46-31) 743 0300
Fax: (46-31) 743 0444
Email: fiskeriverket@fiskeriverket.se
www.fiskeriverket.se
Swedish Forest Agency
S-551 83 JONKOPING, Sweden
Tel: (46-36) 35 93 00
Fax: (46-36) 16 61 70
Email: skogsstyrelsen@skogsstyrelsen.se
www.skogsstyrelsen.se

Swedish Customs
Box 12854
S-112 98 STOCKHOLM, Sweden
Tel: (46-771) 520 520
Fax: (46-8) 20 80 12
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Statistics Sweden
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Tel: (46-8) 506 940 00
Fax: (46-8) 661 5261
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www.scb.se

Association of Swedish Chambers of Commerce
Box 16050
S-103 21 STOCKHOLM, Sweden
Tel: (46-8) 555 100 00
Fax: (46-8) 566 316 35
www.cci.se

Swedish Federation of Trade
S-103 29 STOCKHOLM, Sweden

Tel: (46-10) 47 18 500
Fax: (46-10) 47 18 665
Email: info@svenskhandel.se
www.svenskhandel.se

A. KEY TRADE & DEMOGRAPHIC INFORMATION

SWEDEN	**2009**
Agricultural Imports From All Countries ($Mil)/U.S. Market Share (%)	13,781/1.4% *
Consumer Food Imports From All Countries ($Mil)/U.S. Market Share (%)	8,200/1% *
Edible Fishery Imports From All Countries ($Mil)/U.S. Market Share (%)	1,153/1% *
Total Population (Millions)/Annual Growth Rate (%)	9.1/ 0.16%
Urban Population (Millions)/Annual Growth Rate (%) (2000)	7.5/ N/A
Number of Major Metropolitan Areas	4
Size of the Middle Class (Millions)/Growth Rate (%)	N/A
Per Capita Gross Domestic Product (U.S. Dollars)	36,800
Unemployment Rate (%)	9.3%
Per Capita Food Expenditures (U.S. Dollars)	3,053
Percent of Female Population Employed	73.4%**
Average Exchange Rate US$ 1 for 2009	7.821

* Source: Swedish Statistics
** Between ages 16 and 64, Source: SCB-AKU

Note: Above data on U.S. trade do not include substantial imports of U.S. products which are transshipped to Sweden via other EU countries.

TABLE B. CONSUMER FOOD & EDIBLE FISHERY PRODUCT IMPORTS

Sweden Imports (In Millions of Dollars)	**Imports from the World**			**Imports from the U.S.**			**U.S Market Share**		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
CONSUMER-ORIENTED AGRICULTURAL TOTAL	7,414	8,524	7,565	113	120	118	1	1	1
Snack Foods excl. nuts	543	612	559	1	1	1	0	0	0
Red Meats, Fresh/Chilled/Frozen	754	900	765	0	0	0	0	0	0
Red Meats, Prepared/Preserved	290	342	299	0	0	0	0	0	0
Poultry Meat	156	199	171	0	0	0	0	0	0
Dairy Products (Excl. Cheese)	319	407	381	0	0	2	0	0	1
Cheese	379	510	459	0	0	0	0	0	0
Eggs	39	44	38	0	0	0	0	0	0
Tree Nuts	76	85	68	20	20	16	27	24	23
Fresh Fruits	784	832	679	6	5	4	1	1	1
Processed fruits and vegetables	679	803	757	29	35	39	4	4	5
Fruit & Vegetable Juices	174	222	160	1	1	0	1	0	0
Wine	599	677	656	12	16	15	2	2	2
Beer	94	112	113	2	3	5	2	3	4
Condiments	36	52	55	1	1	2	3	2	3
Pet Foods (Dog & Cat Food)	128	133	164	6	5	1	5	4	1
Other Consumer-Oriented Products	2,364	2,594	2,241	35	33	33	1	1	1
FISH & SEAFOOD PRODUCTS	2,463	2,679	2,593	16	12	11	1	0	0
Groundfish & Flatfish	701	675	574	7	4	4	1	1	1
Frozen fish/seafood	273	280	262	4	3	3	1	1	1
Salmon	1,009	1,245	1,349	2	1	1	0	0	0
Molluscs	11	13	11	1	1	1	9	6	6
Crustaceans	247	249	236	2	2	1	1	1	1
Other Seafood	222	217	161	0	1	1	0	1	1
AGRICULTURAL PRODUCTS TOTAL	9,219	10,989	9,576	161	189	179	2	1.4	1.5
AGRICULTURAL, FISH & FORESTRY TOTAL	13,995	15,893	13,649	211	231	216	1.4	1.3	1.3

Source: Global Trade Atlas

Note: Above data on U.S. trade do not include substantial imports of U.S. products which are transshipped to Sweden via other EU countries.

TABLE C. TOP 15 SUPPLIERS OF CONSUMER FOODS & EDIBLE FISHERY PRODUCTS

Sweden – Top 15 Suppliers

CONSUMER-ORIENTED AG IMPORTS

$1,000	2007	2008	2009
Denmark	1446488	1751028	1448157
Netherlands	1273181	1391540	1242979

FISH & SEAFOOD PRODUCT IMPORTS

$1,000	2007	2008	2009
Norway	1881966	2074288	2075601
Denmark	222084	242415	207275

Germany	1035733	1238188	1085169
Italy	434264	506720	461697
France	397022	452018	418842
Spain	383286	391446	347190
Belgium	306593	359980	338270
Ireland	257811	308184	250324
Finland	241131	260938	241207
Poland	141350	197376	201963
United Kingdom	227233	236053	198255
United States	113070	120296	117831
South Africa	88753	102547	99372
Norway	118391	125902	95348
Austria	62204	82588	69303
Other countries	887916	999420	948646
World	7414426	8524224	7564553

China	69646	64055	57624
Netherlands	42980	37095	29985
Germany	25766	27420	25263
France	23303	24093	22343
Thailand	33688	33262	19540
Canada	21645	21528	17639
Finland	16933	16289	17566
Vietnam	11391	13679	15721
Poland	16309	17163	14104
United States	14391	11632	11156
Morocco	970	4897	11097
Iceland	12421	14401	10016
Russia	6122	7917	7842
Other countries	63573	69256	50506
World	2463188	2679390	2593278

Source: Global Trade Atlas

Note: Above data on U.S. trade do not include substantial imports of U.S. products which are transshipped to Sweden via other EU countries.