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GAIN Report

Global Agricultural Information Network

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Retail Food Sector Report for Sweden and Finland

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Retail Food Sector

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Report Highlights:

The consolidation and restructuring of the Nordic retail food sector offers interesting opportunities for U.S. suppliers in terms of volume and variety of products in demand. Best prospects include processed fruits and vegetables, tree nuts, organic food products and products appealing to the health conscious. A major impediment to increased U.S. sales is consumer resistance to products containing genetically modified (GMO) ingredients.

General Information:

SECTION I. MARKET SUMMARY

SWEDEN AND FINLAND

Both Sweden and Finland were hit hard by the global economic downturn in 2008, but the Swedish and Finnish economies are on the road to recovery. Exports have surged and rising household consumption and business investments are helping to strengthen the economies. Although the demand for high-value, consumer-ready products remained strong in Sweden and Finland in 2009, the outlook for private consumption has become more negative and consumers have become more cautious.

The food retail sector in these markets is predominantly integrated and concentrated. In both Sweden and Finland, the three largest import/wholesale groups supply over 80% of the market. Restructuring of the Nordic retail food sector continues as pan-Nordic mergers and cooperative agreements seek to achieve greater efficiencies and economies of scale to fend off other European competitors. Swedish and Finnish retail chains are meeting the stiff competition through increased efficiency -- centralizing purchases, forming international alliances and expanding operations within the Nordic/Baltic region. In these concentrated markets where retailers have such large market share, growth at home becomes virtually impossible. Looking abroad, in the form of mergers and cooperation at the international level, has become the only possible path to growth.

The fastest growing "concept" in the food retail trade in Sweden and Finland is discount stores. While discount stores currently only account for about 10-13 percent of the retail trade in Sweden and Finland, volumes have tripled over the last ten years. This has stirred interest among foreign players to enter the domestically dominated Nordic food retail market. The German hard discounter Lidl has already established a presence both in Sweden and Finland. Other players are likely to follow. The entry of Lidl has undoubtedly changed the dynamics of food retailing and is putting pressure on the previously unthreatened Swedish and Finnish grocery conglomerates. Swedish and Finnish retailers are responding by refocusing their stores to a more price-oriented basis and introducing new private label items to match Lidl's low prices. Also, many retailers have opened up their own discount stores.

The trend throughout Europe of fewer but larger players continues. In 2009, half of the Swedish retail food sales of approximately USD 38 billion went through large supermarkets and hypermarkets. In Finland, large supermarkets and hypermarkets accounted for about 78% of retail food sales of USD 21 billion. There were about 6,100 food retail outlets in Sweden in 2009 compared to 13,000 in 1970. In Finland, the number of outlets dropped to 3,917 in 2009, slightly fewer than during the previous year.

Swedish and Finnish consumers are gravitating towards fresher, more convenient and more nutritious foods. High demands are made on food quality, origin and environmental concerns. Consumer interest in organic food products has been increasing rapidly. 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. Eating out is growing faster than traditional retail sales. Both in Sweden and Finland, about 20 percent of meals are currently eaten out of the home. Fast food is the segment benefiting most from this trend. American-style fast food chains, sushi bars and coffee shops are extremely popular in these markets.

Organic and functional foods are gaining in popularity with significant consumer awareness in the area of food safety and healthy eating habits. This includes not only products with low fat benefits, but also those with nutritional advantages, such as added fiber, vitamins and minerals, or ingredients with perceived disease-preventative qualities. There are many functional food products either on the shelves or under development, especially in Finland, which has become the "Silicon Valley" of the functional food industry for Europe. Consumers are willing and able to pay higher prices for food and drink products that fall into these categories. Also, through increased travel and a willingness to move away from their culinary traditions, Swedish and Finnish consumers are more open to ethnic foods.

Internet retail food sales have been limited despite the region's high per capita ownership of computers and consumers'

expressed interest in online food purchasing. The positive outlook of major retailers towards this sales vehicle at the end of 1990's changed rather quickly and the list of retailers terminating their websites grew long. However, there are signs that customers have overcome earlier suspicions to online food purchases and retailers have again started to offer food online in larger cities.

Average exchange rate 2009 in Sweden: US\$ 1 = SEK 7.6457
 Average exchange rate 2009 in Finland: US\$ 1 = EUR 0.7189

Advantages and Challenges Facing U.S. Products in Sweden and Finland

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

SECTION II. ROAD MAP FOR MARKET ENTRY

As stated above, these markets are dominated by only a few import/wholesale/retail groups, and therefore, U.S. exporters have a relatively easy job of locating potential buyers. However, for the same reason, it may be difficult to get in the door. Depending on the product and the volume, there are different ways for American exporters to penetrate these markets:

- retailers/wholesale groups (large quantities)
- specialized importers/distributors (niche and select brand name and private label products)
- agents (products with strong brand names)

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

arket research in order to assess product opportunities and existing competition.

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

ocating 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.

Market Structure

The Swedish and Finnish retail food industry has long been characterized by stability and a low degree of internationalization. However, this picture began to change in 1999 when the Dutch retail food giant Ahold took over a 50% interest in Sweden's leading retailer ICA. Subsequently, there has been a wave of consolidations among retailers in the region resulting in a Nordic, rather than domestic, focus to marketing.

Looming international competition has increased the role of volume dynamics in the Nordic food retail sector. All major players are seeking to minimize costs by coordinating central purchasing and taking advantage of economies of scale. Also, Nordic retailers are aggressively promoting the development of private label product lines.

The general trend remains unchanged in Sweden and Finland, with hypermarkets and large supermarkets increasing sales volumes, while small and medium-sized stores lag behind. The number of retail outlets continues to decline, although at a somewhat slower pace.

Discount stores continue to gain market share in both Sweden and Finland. Although their share is still modest at around 10-13%, the sector has grown about 200% over the last ten years. Discount stores have not been developed as extensively in Finland as in Sweden. However, this scenario began to change with the market entry of German hard discounter, Lidl, into Finland in 2002. The expansion has been rapid: seven years after launch, Lidl has 133 outlets and has grabbed a 5.1% market share in Finland. Lidl has had a considerable effect on the Finnish food retail market. The arrival of Lidl boosted competition and pushed down prices in the trade. The low price products appealed to the Finnish consumers and Finnish retailers were not prepared for the price competition that Lidl kicked off. As a result, retailers are opening up their own discount units and increasing the number of products sold under their own label -- which provides better margins.

While Swedish consumers tend to be brand conscious, they also look for branded, and other, products at discount. In September 2003, Lidl established a presence in Sweden and in 2009, there were 144 outlets. In 2002, the leading Danish retailer, Dansk Supermarked, opened the first Netto discount stores in Sweden. So far, 117 Netto stores have opened in Sweden. Axfood, the main player in the discount sector in Sweden, has integrated several chains into the "Willys" group, a Swedish version of Lidl's outlets.

A. Super stores, supermarkets, hyper markets, discount stores

Sweden - Company Profiles

The Swedish wholesale and retail food market is dominated by three nationwide groups - ICA (49.8%), Coop (20.4%) and Axfood (15.6%) – while a fourth, Bergendahlsgruppen (5.7%), is mainly active in Southern Sweden. Together they account for over 90 percent of the food retail market. Each group has developed a tight integration of purchasing, importing, wholesaling, distribution and retailing. Imports of foods are either handled by the chains themselves or through specialized importers and agents. In the process of restructuring, these groups have moved to centralized purchasing and are also engaged in joint Nordic buying groups.

The **ICA Group** is one of the Nordic region's leading grocery retail groups with stores in Sweden, Norway and the

Baltic countries. **ICA Sweden** is the leading food retail company in Sweden. It is the principal supplier to ICA retailers, who own and manage their stores as independent businesses. In 2009, sales in the 1,359 ICA stores accounted for 49.8% of Sweden's retail food sales in 2009.

COOP represents the cooperative movement in Sweden and operates chains such as Coop Forum, Coop Extra, Coop Konsum, Coop Nära and Coop Bygg. In Sweden, Coop operates 807 outlets and accounted for 20.4% of Sweden's retail food sales in 2009.

Axfood AB's retail operations are conducted through the wholly owned Willys, Hemköp and PrisXtra chains, comprising 314 stores totally. In addition, Axfood collaborates with a large number of proprietor-run stores that are tied to Axfood through agreements. Wholesale business is conducted through Dagab and Axfood Närlivs. Axfood had a market share of 15.6% of Sweden's retail food sales in 2009.

BergendahlsGruppen AB is a regional group with a strong base in the Southern part of Sweden. Bergendahls has a total of 185 outlets (food retail, discount, supermarkets) and a market share of 5.7%. In 2002, BergendahlsGruppen entered the Stockholm market with Eko Lanna and City Gross outlets. The City Gross outlets have, in general, a sales area of 7,000-12,000 square meters.

SWEDEN – MAJOR FOOD RETAIL PROFILE

Retailer/Type of Outlet	Ownership	Sales CY09 (\$ Mill)	No. of Outlets	Location	Mkt Share	Purch/ Agent Type
ICA AB -food retail -supermarkets -hyper-markets -gas marts/convenience -discount (joint)	Swedish/ Norwegian/ Dutch	14,838	1,359	Sweden Norway Baltikum	49.8	Direct/ importer/ wholesaler
Coop -food retail -gas marts/convenience -supermarkets -hyper-markets -department stores	Swedish	6,061	727	Sweden Norway Denmark	20.4	Direct/ importer/ wholesaler
Axfood -food retail -convenience -discount stores -supermarkets -gas	Swedish	5,336	979	Sweden Norway Denmark	15.6	Direct/ importer/ wholesaler

marts/convenience						
BergendahlsGruppen -food retail -discount stores -supermarkets	Swedish	1,730	185	Southern Sweden Stockholm	5.7	Direct/ importer/ wholesaler
Lidl -hard discount stores	German	821	144	Sweden Finland	3.6	Direct/ importer/ wholesaler
Netto -discount stores	Danish	552	117	DenmarkSweden	2.6	Direct/ importer/ wholesaler

Finland - Company Profiles

A few central wholesalers (S-Group, K-Group, Suomen Lähikauppa) together dominate the food industry with an aggregate market share of 87.6%. These 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. They also have hotel and restaurant chains and catering services. The centralized system makes distribution economical; purchases from abroad can be made in viable quantities considering the relatively small size of the market. Almost one-third of the total wholesale trade in Finland is transacted through these wholesale organizations.

The past few years have been characterized by increasingly intensifying competition in the Finnish food retail market as the Finnish retail chains responded to the entry of international competitors. Foreign competition and the enlargement of the EU have made the Finnish food retail trade part of the EU common market. A number of major mergers and acquisitions have taken place, which have led to fewer but much larger and more powerful domestic players.

Retailers have reacted to the price competitive market and to the German hard discounter Lidl's rapid expansion in Finland by lowering prices of their private label brands and by offering services such as bakeries, cafeterias, fresh meat and fish service points that aren't offered by discounters such as Lidl. Private label products increased their share in all retail chains.

S-GROUP

The S-Group and Suomen Lähikauppa represent the cooperative movement in Finland. The S-Group consists of member-owned regional cooperative societies and their subsidiaries and the Finnish Cooperative Wholesale Society (SOK). The S-Group operates department stores, supermarkets, hypermarkets, discount grocery stores, service stations, hotels and restaurants, hardware and agricultural stores as well as several specialty stores. Through its subsidiaries and associated companies, the S-Group also conducts food trade in the Baltic countries and Russia. The S-Group's grocery store chains have, during recent years, been extremely successful. This success can be measured by a market share increase from 15.9% in 1990 to 43.2% in 2009.

KESKO OY consists of the parent company Kesko Ltd. and its four subsidiaries of which Kesko Food Ltd. is the

largest. The key businesses of Kesko Food Ltd. are the chain operations of the K-Food stores in Finland, Kespro's catering sales to HRI customers and wholesaling and retailing in the Baltic countries and Russia. The K-food stores are privately owned and buy most of their products from the Kesko wholesale organization. Centralized purchasing provides a competitive advantage by creating volume and synergy benefits. Also, Kesko works in cooperation with major European food chains in AMS (Associated Marketing Service). Kesko continues to expand its operations in the Nordic and Baltic countries. Total sales of the Kesko-affiliated retailers accounted for 34.2% of retail food sales in Finland in 2009.

Suomen Lähikauppa OY's current business structure was launched at the beginning of 2009 when Tradeka Ltd. became Suomen Lähikauppa OY. Suomen Lähikauppa is the result of many mergers and acquisitions. The latest merger took place in 2005, when Cooperative Tradeka Corporation's retail outlets and Wihuri/Ruokamarkkinat Ltd.'s retail chains joined forces to form a new company. The merger resulted in a strong new player in the Finnish retail sector. Suomen Lähikauppa OY is the third largest actor in Finland's food retail industry and a market leader in the neighborhood shop market. In 2009, Suomen Lähikauppa had a market share of 10.2% of Finland's retail food sales.

Stockmann Group is a Finnish company engaged in grocery retailing through its department stores in Finland, Russia, Estonia and Latvia. Sales in the seven Stockmann department stores accounted for 1.3% of Finland's retail food sales in 2009. The grocery department of Stockmann department stores is known as Stockmann Delicatessen. Stockmann's food purchasing channels include the company's own channel and Tuko Logistics OY.

LIDL, the German hard discounter, entered the Finnish market by simultaneously opening up ten outlets around the country in August 2002. At the beginning of 2009, Lidl had 133 outlets throughout Finland and an estimated market share of 5.1%. Lidl's entry into the Finnish market has undoubtedly increased competition in the Finnish food retail sector. The low-priced products appeal to the Finnish consumer; Finnish retailers were not prepared for the price competition set off by Lidl. According to a market survey, Lidl's products are priced at about 10-15% below the average Finnish food prices and about 80% are private label products.

FINLAND – MAJOR FOOD RETAIL PROFILE

Retailer/Type of Outlet	Owner ship	Sales CY09 (\$ Mill.)	No. of Outlets	Location	Mkt Share	Purchasing/ Agent Type
S-Group - hyper-markets - dept stores - supermarkets - self-service - small shops - discount stores	Finnish	8,559	943	Finland Estonia Latvia Lithuania	43.2	Importer/ wholesaler (Inex)
Kesko (K-Group) - hyper-markets - dept stores - supermarkets - self-service - small shops - discount stores	Finnish	6,775	1,030	Finland Sweden (hardware) Estonia Latvia Lithuania Russia	34.2	Importer/ wholesaler (Kesko Food)
Lähikauppa OY - hyper-markets	Finnish	2,019	768	Finland Russia	10.2	Importer/ wholesaler

- dept stores - supermarkets - self-service - small shops						(Tuko Logistics)
Lidl - hard discount	German	1,010	133	Finland Sweden	5.1	Importer/ wholesaler
Stockmann Group -department stores	Finnish	262	7	Finland Russia Estonia Latvia	1.3	Importer/ Wholesaler (Tuko Logistics)

INEX PARTNERS OY is the S-Group's sourcing and logistics company, a subsidiary of SOK.

KESKO FOOD is responsible for the purchasing, logistics and chain management of the K-food stores.

TUKU LOGISTICS is a purchasing and logistics company in charge of grocery purchasing for Suomen Lähikauppa and Stockmann.

B. Convenience Stores, Gas Marts, Kiosks

Entry Strategy

The convenience sector offers more limited opportunities for the U.S. exporter, but certain products could sell well via such outlets. Most of the convenience stores belong to established retail chains, and the same large wholesalers/retailers are suppliers to the convenience sector. Gas marts are either affiliated with gasoline companies or with the large retail food distribution groups. New-to-market exporters should target this sector in the same way as described under the entry strategy section for supermarkets.

Market Structure

Convenience stores have been in a continued decline in Sweden and Finland for the last couple of years, mostly due to tough competition from gas marts and the fact that supermarkets have progressively increased their opening hours to equal those of the convenience stores. However, several of the large retail chains have started a network of convenience stores with a large range of ready-made-meals as a complement to their larger outlets, and thus, can push prices down. These stores are especially popular in larger cities, where time-pressured lifestyles predominate.

Another positive trend for convenience stores is the increasing number of one-person households who do most of their grocery shopping in smaller stores and consume more ready-meals and other convenience foods. In Finland, opening hours for stores of under 400 sqm were extended in 2001. This prompted somewhat of a renaissance for small convenience stores. In 2009, grocery sales in convenience stores reached \$2,843 million in Sweden and \$411 million in Finland.

Sales through **Gas marts**, which saw rapid growth throughout the 1990s, have begun to slow down. The emergence of discount outlets with long opening hours, low prices and locations close to main roads has increased competition. In the past few years, there has been a large close-down of smaller gas stations and stations have had to leave their contract with

the gasoline companies. In 2009, about a hundred gas marts disappeared from the Swedish market, when Shell Select gas marts were transformed into 7-Eleven shops. Fast food is the fastest growing section in gas marts. The major food retailers have recognized this trend and have focused on expanding the range of products available. In 2009, total sales of grocery products in gas marts in Sweden amounted to \$1.5 billion, or about 5% of total retail food sales. In Finland, sales reached \$376 million in 2009.

Kiosks offer limited items such as snacks, sweets, cigarettes and magazines. The Rautakirja R-Kioski is Finland's leading kiosk chain and convenience outlet concept, where kiosks still have about 3% of total grocery sales. In recent years, R-Kioski has moved to selling more convenience products and enlarging the kiosks to fit changing customer needs. The chain comprises over 700 R-Kiosks in Finland and is also active in Estonia, Latvia, Lithuania, the Netherlands, Romania, Russia and the Ukraine. In Finland, grocery sales in kiosks reached \$0.3 billion in 2009.

SWEDEN - MAJOR GAS MARTS AND CONVENIENCE STORES

Retailer Name/ Outlet Type	Ownership	2009 Grocery Sales (US\$ million)	No. of Outlets	Location	Purchasing Agent Type
Statoil/ICA Express, gas mart	Statoil/ICA (Norwegian/Swedish)	577	350	Sweden Norway Denmark	Wholesaler/ importer (ICA)
OK/Q8, gas mart	Swedish/ Kuwait Petroleum	516	406	Nationwide	Wholesaler/ importer (Axfood)
Select, gas mart	Swedish Shell (Dutch/Swedish)	121	115	Nationwide	Wholesaler/ importer (Reitan)
Preem, gas mart	Saudi/ Swedish	128	175	Nationwide	Wholesaler/ importer (Axfood)
Pressbyran, convenience	Reitan Servicehandel (Sweden)	403	327	Sweden Norway Latvia	Wholesaler/ importer (Reitan)
Tempo, convenience	Axfood (Swedish)	263	127	Nationwide	Wholesaler/ importer (Axfood)
NaraDej, convenience	Menigo Foodservice (Swedish)	160	180	Nationwide	Wholesaler/ importer (Menigo)

					Fodservice)
Handlar'n, convenience	Axfood (Swedish)	197	234	Nationwide	Wholesaler/ importer (Axfood)
7-Eleven, convenience	Reitan Servicehandel	283	191	Nationwide	Wholesaler/ importer (Reitan)

FINLAND – MAJOR GAS MARTS AND CONVENIENCE STORES

Retailer Name/ Outlet Type	Ownership/ Partnership	2009 Grocery Sales (US\$ million)	No. of Outlets	Location	Purchasing Agent Type
ABC, gas marts	S-Group	287	108	Nationwide	Wholesaler/ Inex
Neste Quick Shop, gas marts	Neste	195	300	Nationwide	Wholesaler/ Importer
Shell Select, gas marts	Shell Finland	102	200	Nationwide	Wholesaler/ Importer
Esso Snack & Shop, gas marts	Esso Finland	71	70	Nationwide	Wholesaler/ Importer
R-Kioski, kiosk	Finnish	381	703	Finland Estonia Latvia Lithuania	Wholesaler/ Importer
Siwa, convenience store	Finnish Suomen Lähikauppa	756	553	Nationwide	Wholesaler/ Inex
K-Market, convenience store	Finnish Kesko	2.2	487	Nationwide	Wholesaler/ Kesko

C. Traditional Markets - Small Independent Grocery Stores

The small "gourmet food" grocery stores offer limited possibilities for U.S. exporters. These stores are usually located in larger cities and sometimes carry a wide range of imported products, but they tend to buy in very small quantities.

SECTION III. COMPETITION

European Union (EU) member states provide the main competition to U.S. consumer-oriented food imports. EU-origin products have a natural advantage in many product categories simply because they enter Sweden and Finland duty free, while American exporters have to face the EU's external duty/tariff structure as well as non-tariff barriers to trade (e.g. beef hormone ban, sanitary restrictions on poultry and GMO policies).

A. Sweden's Imports of Consumer-Oriented Agricultural Products, 2007-2009

Country	Import 2007 (\$1,000)	Import 2008 (\$1,000)	Import 2009 (\$1,000)	Market Share %
Sweden				
Denmark	1,446,488	1,751,028	1,448,157	19
Netherlands	1,273,181	1,391,540	1,242,979	16
Germany	1,035,733	1,238,188	1,085,169	14
Italy	434,264	506,720	461,697	6
France	397,022	452,018	418,842	6
Spain	383,286	391,446	347,190	5
Belgium	306,593	359,980	338,270	4
Ireland	257,811	308,184	250,324	3
Finland	241,131	260,938	201,963	3
Poland	141,350	197,376	201,963	3
United Kingdom	227,233	236,053	198,255	3
United States	113,070	120,296	117,831	2

South Africa	88,753	102,547	99,372	1
Norway	118,391	125,902	95,348	1
Austria	62,204	82,588	69,303	1
Other	887,916	999,420	948,646	13
World	7,414,426	8,524,224	7,564,553	100

Source: Global Trade Atlas

Note: Imports from the U.S. are understated due to transit trade via other EU countries such as the Netherlands and Germany.

B. Finland's Imports of Consumer-Oriented Agricultural Products, 2007- 2009

Country Finland	Import 2005 (\$1,000)	Import 2006 (\$1,000)	Import 2007 (\$1,000)	Market Share %
Sweden	515,579	591,431	570,532	17
Germany	496,721	604,987	543,272	16
Netherlands	493,279	552,177	533,244	16
Denmark	251,568	280,170	257,066	8
France	205,207	266,659	224,262	7
Spain	164,829	188,528	185,084	6
Belgium	160,498	196,471	179,539	5
Italy	107,568	134,975	127,533	4
Poland	55,599	73,535	86,562	3
Estonia	46,114	78,051	70,740	2
United Kingdom	62,125	64,161	64,318	2
Chile	37,789	44,787	44,435	1
Czech Republic	14,011	23,213	34,713	1

Switzerland	18,020	23,793	33,645	1
United States	25,717	30,938	22,240	1
Other	335,101	381,061	341,340	10
World	2,989,725	3,534,937	3,318,525	100

Source: Global Trade Atlas

Note: Imports from the U.S. are understated due to transit trade via other EU countries such as the Netherlands and Germany.

SECTION IV. BEST PRODUCT PROSPECTS

A. Products Present in the Markets Which Have Good Sales Potential

Processed Fruits & Vegetables
Tree Nuts
Dried Fruit
Wine
Beer
Fish and Seafood
Fruit Juice
Sauces/Seasonings
Pancake/Cake Mixes
Rice (most U.S. rice currently packaged in other European countries)
Confectionery

B. Products Not Present in Significant Quantities but Which Have Good Sales Potential

Fresh Fruits and Vegetables
Organic Food
Ethnic Food
Snack Food
Niche Market/Specialty Food Products
Frozen Food
Rice Mixes
Vegetarian Food
Ready-Made/Convenience Meals
Pet Food
Non-Hormone Beef

C. Products Not Present Because they Face Significant Barriers

Hormone Treated Beef (EU hormone ban)
Poultry (sanitary restrictions)

SECTION V. POST CONTACT AND FURTHER INFORMATION

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For further information on exporting U.S. agricultural products to Sweden and Finland, please visit the FAS/Stockholm home page at: <http://stockholm.usembassy.gov/fas.html>

SECTION VI. OTHER RELEVANT REPORTS

Report	Link
SW1006 Exporter Guide	http://www.fas.usda.gov