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Report Highlights:

The exporter guide provides an economic and market overview, as well as trends and practical tips for U.S. exporters on how to conduct business in Sweden. The report further describes three market sectors (food retail, food service, and food processing), market entry strategies, and high-value product prospects, focusing on consumer-oriented products. Additional reports referenced herein can be found at the following website: https://gain.fas.usda.gov/#/search.

Market Fact Sheet: Sweden

Executive Summary:
Sweden is a country centrally located in the Nordics - bordering Norway and Finland and connecting to Denmark via a bridge. Its principal cities, the eastern Stockholm and southwestern Gothenburg and Malmö, are all coastal. Sweden is a modern, developed economy and has a high standard of living. Its population totals over ten million. The United States is its third largest non-EU supplier of agricultural and related products ($240 million).

Imports of Consumer-Oriented Products:
Products from other EU Member States lead Swedish imports of consumer-oriented products. In 2021, the United States was the fifteenth largest supplier of these products to Sweden, with imports valued at almost $142 million.

	2021
EU	9,406
Non-EU:	1,480
-Norway	266
-United Kingdom	154
-United States	142
-Other Non-EU	918
Total	10,886

Source: Trade Data Monitor

Food Processing Industry:
In 2021, roughly 3,000 food companies generated a combined turnover of $18.9 billion. The industry employs about 55,000 people annually. The most important sectors (in sales) are bakeries, meat companies, and dairy companies. Food processing establishments are supplied by domestic producers but also depend on imports due to Sweden's climate and its short growing season.

Food Retail Industry:
The Swedish food retail market was valued at $32 billion in 2021. The three leading retailer groups -- ICA Gruppen, Kooperativa Förbundet Group, and Axel Johnson -- have a combined market share of almost 70 percent. Supermarkets (including full-service supermarkets, discounters, and convenience stores) dominate the food retail landscape. There are hardly any independent grocers or large hyper-markets in Sweden.

Foodservice – HRI Industry:
Total sales of the HRI foodservice industry in 2021 were valued at $11.8 billion. Sweden did not implement strict lockdown periods to combat the spread of the coronavirus. Nevertheless, while overall sales in 2021 picked up, they were still below those before the pandemic. Full-service restaurants' sales ($6.4 billion) dominate total HRI foodservice sales.

Quick Facts CY2021
Imports of Consumer-Oriented Products, total:
$10.9 billion

List of Top 10 Growth Products in Sweden (imported from the World):

1. Cheese	6. Palm oil
2. Wine	7. Cocoa
3. Food preparation	8. Water
4. Bakery products	9. Condiments & sauces
5. Confectionary	10. Odoriferous substances

Food Industry by Channels 2021, in $ billion:

Consumer-Oriented Products Imports	$10.9
Consumer-Oriented Products Exports	$5.5
Agricultural & Related Products Imports	$22.9
Agricultural & Related Products Exports	$19.1
Food Industry	$18.9
Food Retail	$32.0
Food Service	$11.8

Largest Food Retailers, Market Share:

1. ICA	38.8%	5. Lidl	4.2%
2. COOP	16.7%	6. City Gross	3.0%
3. Axfood	14.0%	7. OKQ8	1.1%
4. Systembolaget	12.2%	8. Circle-K	1.0%

Strengths/Weaknesses/Opportunities/Challenges:

Strengths: Strong demand for branded packaged foodstuffs and products with a special claim, certification, and sustainable production method.	Weakness: Shipping costs and import tariffs make U.S. products more expensive. U.S. products do not automatically meet EU labeling requirements.
Opportunities: Swedes are open to new products, innovative food concepts, and international cuisine. There is a strong demand for foodstuffs that contribute to a healthier lifestyle.	Threats: There is fierce competition on price, quality, uniqueness, and innovation from other EU Member States and third countries that have negotiated lower tariff rates, such as Canada.

Data and Information Sources: Trade Data Monitor, industry experts, company websites
Contact: FAS The Hague, agthehague@usda.gov

SECTION I. DETAILED MARKET OVERVIEW

Introduction
Sweden is a country in the Nordic region of Europe (which includes Sweden, Norway, Denmark, Finland, and Iceland) with thousands of coastal islands and inland lakes, along with vast boreal forests and glaciated mountains. With 450,000 square kilometers, it is the largest country in the Nordics -- bordering Norway and Finland and connecting to Denmark via a bridge. Its principal cities, the eastern Stockholm and southwestern Gothenburg and Malmö, are all coastal. The Capital, Stockholm, is built on 14 islands and has more than 50 bridges. Sweden is a constitutional monarchy and their king since 1973 is Carl XVI Gustav. Sweden has been a member of the European Union (EU) since 1995 but decided not to participate in the Euro -- the Swedish Krona (SEK) is its currency.

Overall Business Climate
Sweden, with a gross domestic product (GDP) of $627 billion (2021) and a population of 10.5 million, is the largest Nordic economy and boasts a transparent, highly developed, sophisticated, and diversified market. Sweden ranks among the top 10 worldwide on several competitiveness studies (e.g., WEF, IMD) which is due, in part, to Sweden's export-oriented manufacturing sector, competitive small and medium-sized enterprises (SME), and budgetary discipline. Sweden also consistently ranks high for its connectivity, governance, investment in research and development, and business climate. Additional information can be found in the U.S. Department of Commerce's Sweden Country Commercial Guide.

Sweden relies heavily on imports due to its climate with severe winters and short growing season. In 2021, Swedish imports of agricultural and related products totaled $22.9 billion of which almost 60 percent came from Norway, the Netherlands, Denmark, and Germany. After Norway and the U.K., the United States was the third largest non-EU supplier, closely followed by China. Swedish imports of agricultural and related products from the United States were valued at $240 million in 2021. The United States is Sweden's second largest export market for agricultural and related products outside the EU, equaling $793 million. These exports grew by 80 percent between 2016 and 2021. Based on 2022 January-October trade figures, U.S. exports to Sweden are expected to increase in 2022, mainly due to higher export values for ethyl alcohol and wine.

Impact Covid-19 and War in Ukraine
Sweden saw retail sales in both 2020 and 2021 increase, but not to the extent as in many other countries in the region as Sweden did not implement similarly strict lockdown periods to combat the spread of the coronavirus. The impact of the pandemic on the Swedish HRI Foodservice industry was, as a result, limited compared to many other European countries. Last year, prices for agricultural inputs (including fertilizer, feed, and energy), transportation, and packaging increased significantly resulting in higher prices for foodstuffs. According to the SVT Nyheter, grocery prices increased by 17.4 percent last year and prices for dairy products and oil products increased the most (up 30.3 percent). Prices are expected to continue to increase in 2023.

Advantages (product strengths and market opportunities)	Challenges (product weakness and competitive threats)
Strong demand for (branded) American packaged products which enjoy a favorable	Fierce competition on price, quality, uniqueness, and innovation. Standard U.S. product labels fail to

and good quality image.	comply with EU labeling requirements.
Strong demand for retail-ready products with a special claim, certification, and sustainable production method. U.S. exporters have a good story to tell about sustainability, their supply chain (farm to table), and their State/regional heritage (provenance).	Transatlantic transportation is costly. Some products from the United States are subject to import tariffs. Suppliers from other EU member states have a competitive advantage on tariffs and non-tariff trade barriers and transportation costs and time.
Swedes are open to new products, innovative food concepts, and international cuisine. U.S. products are often innovative and trend setting.	The EU has several Free Trade Agreements that may advantage other third country competitors, including Canada and Mexico.
Growing demand for functional, fresh, and food products that contribute to a healthier lifestyle (better-for-you products).	U.S. beef from hormone-treated cattle, poultry, and products containing GMO derived ingredients that are not EU approved cannot be exported to Sweden.
Swedish importers of packaged goods often serve other markets in the Nordics and Baltics.	U.S. companies tend to manufacture packaged food products in larger packages while Swedes increasingly demand smaller portion packages due to changing eating habits and an increase in one or two person households.

SECTION II. EXPORTER BUSINESS TIPS

Food Retail Sector
In 2021, the turnover of the Swedish food retail market was valued at $32 billion (SEK 329 billion). The food retail industry is consolidated with the three leading retailer groups having a market share of almost 70 percent.

Purchase Group:	Market Share, percentage:	Retail chains:
ICA Gruppen AB Svetsarvägen 16 SE-171 93 Solna, Sweden +46 8 56 15 00 00 www.icagruppen.se	38.8	ICA Supermarket – mid-size supermarkets (20.4 percent); ICA Maxi – hypermarkets (supermarket and department store) (12.6 percent); ICA Nära – convenience stores (5.8 percent);
Kooperativa Förbundet Group Englundavägen 4 SW 17188 Solna, Sweden +46 10 740 00 00 www.coop.se	16.7	Coop Stora – hypermarkets (supermarket and department store) (9.2 percent); Coop – mid-size supermarkets (7.0 percent); Coop MaxiMat – (0.5 percent);
Axel Johnson AB Norra stationsgatan 80 C SE-107 69, Stockholm, Sweden +46 8 553 99 000 info@axfood.se www.axfood.se	14.0	Willy's – (9.0 percent) Hemköp – (3.8 percent) Tempo – (0.6 percent) Handlarn – (0.4 percent) Eurocash – (0.2 percent)
Systembolaget AB Kungsträdgårdsgatan 14 i	12.2	There are over 400 liquor stores in Sweden and they are the only stores that are allowed to sell

SE-103 84, Stockholm, Sweden +46 8 503 303 95 www.systembolaget.se		alcoholic beverages that contain more than 3.5% alcohol.
Schwarz Beteiligungs GmbH Barkarbyvägen 5, SE-177 45, Järfälla, Sweden +46 8 55 55 70 00 www.lidl.se	4.2	Lidl – discount supermarkets (4.2 percent)
Bergendahl & Son AB Industrigatan 22 SW-281 43 Hässleholm, Sweden +46 451 480 00 www.citygross.se	3.0	City Gross – discount large supermarkets (3.0 percent)
OK-Q8 AB Sveavägen 155, SW-113 46, Stockholm, Sweden	1.1	OKQ8 – convenience stores (1.1 percent),
Alimentation Couche-Tard Inc Torkel Knutssonsgatan 24, SW-118 49, Stockholm, Sweden	1.0	Circle K – convenience stores (1.0 percent)
Other	9.0	

Source: Euromonitor, industry source, Wikipedia, company websites

Supermarkets (i.e., full-service supermarkets, discounters, and convenience stores) dominate the food retail landscape and there are very few independent grocers or large hyper-markets in Sweden. The *Kooperativa Förbundet Group* along with its Nordic counterparts, *Danish Coop amba* (Danish Consumers Cooperative Society) and *Norwegian Coop Norge SA*, forms the retail chain Coop Norden. Germany-based discount retail chain *Lidl* and Denmark-based *Normal* are the only non-Swedish food retailers. *Normal* is a non-food retail chain selling confectionary products, beverages, and other packaged convenience products, including some sourced from the United States. Most supermarkets in Sweden have an upscale look.

Due to the rising costs of living and food inflation, Swedish consumers are changing their shopping behavior and are guided by price. Sales of (less expensive) private labeled and processed products have increased while sales of organic products and convenience products (often more expensive) are down. Moreover, consumers are no longer loyal to just one supermarket chain but are on the lookout for the best deal and special offers.

Swedish supermarkets often offer the following U.S. products: confectionary, bakery, condiments and (BBQ) sauces, non-alcoholic beverages, dried fruit (dates and raisins), tree nuts (almonds), cranberries, sweet potatoes, and pulses. Some supermarkets even have an "American section" (in Swedish Amerikanskt). Moreover, the state alcohol monopoly, Systembolaget, offers a good selection of craft beer, wines, and distilled spirits from the United States.

HRI Foodservice Sector
According to Euromonitor International®, a market research provider, total sales of the HRI foodservice industry in 2021 were valued at $11.8 billion, up by eight percent compared to 2020. Sweden, unlike most other European countries, did not implement strict lockdown periods to combat the spread of the coronavirus (COVID-19) which, in turn, partially limited the impact of the pandemic on the Swedish HRI foodservice industry in 2020. Nevertheless, according to Euromonitor International®'s Consumer Foodservice Report of March 2022, "consumer caution and limitations on capacity and social distancing had a negative impact on consumer foodservice value sales in 2020." Foodservice outlets benefited from the improved COVID-19 situation in 2021. While overall sales in 2021 were up, they were still below the value witnessed before the pandemic. Full-service restaurants' sales ($6.4 billion) dominate total HRI foodservice sales, followed by limited-service restaurants and cafés/bars with $2.7 billion and $2.0 billion in sales, respectively.

According to Euromonitor International®'s Consumer Foodservice Country Report of March 2022, "*delivery services* became more popular during 2020, as consumers appreciated being able to have the restaurant experience at home." *Takeaway* sales saw also its market share grow when the pandemic hit Sweden. Both segments are expected to decline as consumers are returning to restaurants, but foodservice outlets will continue to make use of established *delivery* and *takeaway* options through a better and stronger online presence, often using third-party platform applications.

Food Processing Industry
With a turnover of $18.9 billion, the Swedish food processing industry is the third largest industry in Sweden. The most important sectors are bakeries, meat companies, and dairy companies. Food processing plants are supplied by domestic producers but also depend on imported ingredients due to Sweden's climate, with its severe winters and short growing season. The processing industry consists of roughly 3,000 companies and employs 55,000 people annually. Through its sustainability manifesto, the Swedish Food Federation presents five sustainability undertakings that they encourage their member companies to adopt and comply with, on condition that they be relevant to their operations.

Local Business Customs and Consumer Buying Habits
Swedes speak English well and have a high level of education (Masters or bachelor's degree). They are open and business -minded, straightforward, and do not like hierarchy. Swedish buyers like to be well informed about the product they are interested in, as well as its price point and the background about their (future) business partner. They can be quick decision makers while valuing long-term partnerships.

Half of the Swedish population lives in three metropolitan areas -- Goteborg, Malmo, and Stockholm -- and there is a close density of shops in these areas. There are a few supermarkets generally within walking distance anywhere in the city, many with long operational hours. In addition to well-known A-brands, most supermarkets have their own private labels -- often a high-end and a low budget brand. The Swedes spend roughly 13-14 percent of their disposable income on food and beverages. The pandemic has led to Swedes being more concerned about their health and well-being which resulted, for instance, in an increase in the number of juice/smoothie bars and foodservice outlets that offer healthier offerings, including vegan and plant-based options and those based on superfood ingredients and natural and organic ingredients.

Entry Strategy into the Swedish Market

Gaining a thorough understanding of the market, its players (buyer and users of U.S. products) is crucial in understanding opportunities and determining if there is a market for the product. Swedish buyers of U.S products can be both traders (specialized importers) as well as direct users (food processing companies).

Trade shows can serve as a springboard into the market, to establish new trade contacts, and to gauge product interests. U.S. exporters may consider exhibiting at one of the shows in the United States as Swedish buyers regularly travel around the world to see new products, make new contacts, and buy great products. Visiting (or exhibiting) at one of the following trade shows in Europe may be considered as well.

Leading Trade Shows in Europe	
SIAL, Paris, France Europe's largest food & beverages show (alternating with Anuga) **USDA Endorsed** sialparis.com	**ANUGA**, Cologne, Germany Europe's largest food & beverages show (alternating with SIAL) **USDA Endorsed** anuga.com
International Confectionary Fair (ISM), Cologne, Germany European confectionary show ism-cologne.com	**PLMA World of Private Label**, Amsterdam, the Netherlands World's largest private label show plmainternational.com
Fruit Logistica, Berlin, Germany European produce and nuts show **USDA Endorsed** fruitlogistica.com	**Free From Food Expo**, Amsterdam, the Netherlands Regional show for products with special certification amsterdam.freefromfoodexpo.com
BioFach, Nuremberg, Germany European organic show **USDA Endorsed** biofach.de	**Food Ingredients Europe**, Frankfurt, Germany European food ingredients show **USDA Endorsed** foodingredientsglobal.com
ProWein, Dusseldorf, Germany Europe's largest wine show prowein.com	**Nordic Organic Food Fair**, Malmö, Sweden Largest organic show in the Nordics nordicorganicexpo.com
UMAMI, Lillestrøm, Norway Norwegian food and beverages HRI show umamiarena.no	**VinExpo, Paris**, France Large wine show Wineparis-vinexpo.vinexposium-connect.com

U.S. exporters can also contact USDA's Foreign Agricultural Service (FAS) in The Hague, the Netherlands, the U.S. State Regional Trade Groups (SRTG), a commodity Cooperator Group, and/or the National Association of State Departments of Agriculture to obtain additional market entry support. Trade Missions, which are often organized around trade shows in the United States or other industry trade events, have also proven to be an excellent platform for U.S. companies to meet with Swedish buyers.

SECTION III. IMPORT FOOD STANDARDS & REGULATIONS AND IMPORT PROCEDURES

While almost all import regulations and standards within the European Union (EU) are harmonized, U.S. exporters should be aware that national measures still exist for enzymes, certain processing aids, packaging waste management, food contact materials, choice of language (Swedish is the official language in Sweden), use of stickers, samples, the addition of maximum permitted levels of vitamins and minerals that are not yet harmonized within the EU, most irradiated foodstuffs, and product registration, among others.

The 2022 EU Food and Agricultural Import Regulations and Standards provides an overview of the regulation standards as well as links to the required health certificates. It is recommended that U.S. exporters verify the full set of import requirements with their Swedish buyer. The buyer and local freight forwarder or customs agent are often in the best position to research such matters, advise U.S. exporters, and verify it with the Swedish Food Agency. The final approval of any U.S. product is subject to the Swedish rules and regulations as interpreted by border officials at the time of product entry. Additional information about importing food products from the United States into Sweden can be found here, https://www.livsmedelsverket.se/en/business-legislation-and-control/legislation-food-business/importing-food-products.

The standard U.S. product label fails to comply with EU labeling requirements. U.S. exporters should also be aware that the EU has approved a handful of GMOs and, while most of them are intended for feed, only a couple approved varieties can be used in food products. The latter need to be labeled under strict requirements, according to EU Regulation 1829/2003. However, in practice many local retailers refuse to sell foodstuffs containing GMOs. The EU, moreover, has regulated the labeling of food colors, additives and flavorings, and allergens, and also has strict rules on the use of health and nutrition claims as set out in Nutrition & Health Claims Regulation 1924/2006. More information can be found in the EU Food and Agricultural Import Regulations and Standards (FAIRS) report.

SECTION IV. MARKET SECTOR STRUCTURE AND TRENDS

In addition to sustainability, consumers (often Millennials and Generation Z) seem to be willing to pay for authenticity. They want to hear or read about who produced a food product and what the story behind the product is. This desire for authenticity also applies to foodservice outlets. Hosts that have a story to tell about their restaurant, cafe, or bar appeal to today's consumers.

Consumers seem to increasingly be stressed and are struggling to do many things in a regular day resulting in less time for buying food and preparing meals. The demand for convenient healthy and nutritious food products (albeit at an affordable price) is growing more than ever before. Swedes are interested in food and beverages and are influenced by not only traditional media outlets but also seem to trust what an online influencer has to say about a product.

Although Sweden has one of the highest consumption numbers of organic products in the world, $383 per capita per year, its organic market is at a turning point as Swedish consumers are increasingly interested in purchasing sustainably produced food products.

Other priorities include quality, animal welfare, Swedish origin, reasonable working conditions, and food that is grown without chemical pesticides. Organic products have seen increased competition -- grocery traders have cut back on campaigns for organic in recent years, often in favor of foods that are marketed on the basis that they are Swedish or even locally produced. Many products, especially meat, carry the from Sweden logo (see picture). Organic consumption is expected to decrease due to rising prices of foodstuffs and overall costs of living. Additional information about the Swedish Organic Market can be found in the EU Organic Market Report.

Best Products Prospects

Sweden is an interesting market for U.S. ethyl alcohol and several high-value products. The market offers export potential for wine, food preparations, sauces & condiments, almonds, grapes, craft beer, whiskies, protein concentrates, Alaska pollock, and bakery products, among others. FAS/The Hague maintains a list of Swedish buyers of these products. Additional trade statistics can be found at http://apps.fas.usda.gov/gats/default.aspx.

Table 1: Sweden, Best High-Value Products Prospects, $1,000

Product	Total Imports, 2021	Imports from U.S., 2021 (U.S. market share)	Key Constraints Over Market Development	Market Attractiveness for USA
Wine (HS2204)	886,999	43,029 (5 percent)	Imports are up and French, Italian, and Spanish wines are popular. Popular new world wines come from South Africa, Chile, and Australia.	Sweden does not produce wines and therefore depends on imports. The Swedes are among the most affluent consumers in the world.
Ethanol (HS220710)	362,831	42,973 (12 percent)	The ethanol used as transport fuel (bioethanol) is subject to import tariffs and must comply with EU sustainability requirements. For more information see the EU Biofuels Annual.	Sweden is a net importer of bioethanol
Food preparations (HS210690)	495,658	20,311 (4 percent)	Neighboring countries lead the supply of flavored or colored sugar, isoglucose, and lactose.	Food preparations are needed by Swedish food processing companies.
Sauces and condiments (HS210390)	177,230	18,832 (11 percent)	Imports are up and competition from other EU MS and Thailand is growing.	Swedes demand sauces, condiments, and seasonings due to their grilling/BBQ tradition.
Almonds	27,232	12,161	Some competition from	Demand from bakeries

(HS080212)		(45 percent)	Spain for organic almonds.	and snack companies.
Dried grapes (HS080620)	21,933	11,490 (52 percent)	Some competition from Turkey and, to a lesser extent, South Africa	Demand for branded packaged good from retail and ingredients from food and snack companies.
Beer (HS2203)	123,793	11,310 (9 percent)	Competition from Czech Republic, Denmark, Germany, the Netherlands, and the U.K.	Swedes love craft beer with funky labels, great tastes, and a good story.
Distilled spirits (HS2208)	195,442	3,848 (2 percent)	Many foreign producers are geographically close to Sweden and offer quality products.	Demand for branded, good quality, tasty, and unique products that have a story to tell.
Bakery products (HS1905)	488,655	2,761 (<1 percent)	Many foreign producers are geographically close to Sweden and offer quality products.	Demand for good quality and unique products.
Alaska pollock (HS030475)	9,994	2,720 (27 percent)	China is the leading supplier of Alaska Pollock	Processors demand Alaska Pollack.
Chocolate and confectionary	815,954	2,583 (<1 percent)	Competition from other EU MS	Swedes like well-known branded chocolate and confectionary products.
Non-alcoholic beverages (HS2202)	373,092	2,293 (1 percent)	Competition from other EU MS	Swedes like well-known branded and innovative beverages.

Source: World Trade Atlas

Alcohol Monopoly Systembolaget

Direct sales of alcoholic beverages to consumers (more than 3.5 percentage alcohol content) are restricted to a government alcohol monopoly, known as Systembolaget, to help regulate the consumption of alcohol. Systembolaget operates 437 shops throughout Sweden and through another 500 agents in smaller towns and rural areas who serve as pick-up-points. Specialized and licensed importers take care of the importation of alcoholic beverages for Systembolaget. Every three months Systembolaget's purchase department puts out a very specific Tender Request and importers are invited to present their best products, https://www.omsystembolaget.se/english/producers/purchasing-process/. Systembolaget has two main product ranges: the *fixed-range* (2,400 products and renewed every quarter) and the *available-for-order-range* (16,000 products which can be ordered).

Wine

Sweden fully depends on imports. Swedes are interested in high quality wines and are willing to pay for them. Slightly more than half of all wines sold are red wines. Boxed wine is the best-selling type of packaging in Sweden, followed by glass bottles. Sales of wines in PET bottles and carton tetra packaging continues to be small. Organic wines remain popular in Sweden. There are ample opportunities for conventional and organic wines from states such as California, New York, Washington, Oregon, Virginia, and Idaho.

Beer

Craft and organic beer are popular and there is growing interest in gluten-free and locally produced beer, as well as in beer with lower (or no) alcohol content. Beer is increasingly competing with wine as a drink to serve with fine dining. Consumer's interest in the various beer styles and flavors keeps changing. While Swedish beer dominates the market, there is a strong interest in imported specialty beer, including those from the United States.

SECTION V. AGRICULTURAL AND FOOD IMPORTS

Agricultural & Food Import Statistics can be downloaded from the following website https://apps.fas.usda.gov/gats/BicoReport.aspx?type=country. Please make the following selection: Product Type: exports; Market Year: calendar year; Report Type: year-to-date; Country: Sweden; Product: agricultural & related products and Download: word. Table 3 in this report provides an overview of some of the highest value consumer-oriented product prospects.

SECTION VI. KEY CONTACTS AND FURTHER INFORMATION

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Attachments:

No Attachments.