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## Sweden

# Retail Food Sector Report for Sweden and Finland 2008

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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.

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## SECTION I. MARKET SUMMARY

### SWEDEN AND FINLAND

The Swedish and Finnish economies have been growing rapidly in the past few years, but in 2008 the growth has fallen off with weaker tendency in exports, consumption and investments. Although the demand for high-value, consumer-ready products remained strong in Sweden and Finland in 2007, the outlook for private consumption has become more negative and there are signs that the consumers are becoming 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. Growth figures are showing no signs of leveling off, and this, of course, 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 2007, half of Swedish retail food sales of approximately USD 24 billion went through large supermarkets and hypermarkets. In Finland, large supermarkets and hypermarkets accounted for about 55% of retail food sales of USD 17 billion. There were about 6,800 food retail outlets in Sweden in 2007 compared to 13,000 in 1970. In Finland, the number of outlets dropped to 3,922 in 2007, 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. 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. Currently, there are only a few profitable internet operators in food distribution in Sweden and Finland. However, there are signs that customers have overcome earlier suspicions to online food purchases and some retailers have again started to offer food online in certain cities around Sweden.

Average exchange rate 2007 in Sweden: US\$ 1 = SEK 6.76

Average exchange rate 2007 in Finland: US\$ 1 = EUR 0.73

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

<b>Advantages</b>	<b>Challenges</b>
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:**

- 1) Market research in order to assess product opportunities and existing competition.
- 2) Advance calculation of the landed cost of a product in order to make price comparisons vis-a-vis competitors.
- 3) Locating 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: five years after launch, Lidl has 121 outlets and has grabbed a 4.7% 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 2007, there were 132 outlets. In 2001, Sweden's major retailer ICA and leading Danish retailer, Dansk Supermarked, combined forces in a joint venture to operate Netto discount stores in Sweden and Norway. So far, 80 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 (50.3%), Coop (21.4%) and Axfood (15.9%) – while a fourth, Bergendahlsgruppen (8.3%), is mainly active in southern Sweden. Together they account for over 80 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. In 2007, ICA signed an agreement with Danish retailer Dansk Supermarked to reduce its holding in the discount concept Netto from 50 percent to 5 percent. Netto had previously been jointly owned by ICA and Dansk Supermarked. 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 2007, sales in the 1,382 ICA stores accounted for 50.3% of Sweden's retail food sales in 2007.

**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 814 outlets and accounted for 21.4% of Sweden's retail food sales in 2007.

In 2007, the joint ownership of Coop Norden was transformed into a joint purchasing company, Coop Trading. Coop Norden was previously owned by the Nordic consumer cooperatives, The Swedish Cooperative Union, KF, (42%), the Danish Consumers' Co-operative Society (FDB) (38%) and Coop NKL in Norway (20%). In June 2008, the Finnish S-Group acquired a 25% share of Coop Trading which makes the Nordic cooperatives equal owners.

**Axfood AB's** retail operations are conducted through the wholly owned Willys, Hemköp and PrisXtra chains, comprising 336 stores in total. 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 15.9% of Sweden's retail food sales in 2007.

**BergendahlsGruppen AB** is a regional group with a strong base in the southern part of Sweden. Bergendahls has a total of 160 outlets (food retail, discount, supermarkets) and a market share of 8.3%. 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	Owner ship	Sales CY07 (\$ 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	10,606	1,382	Sweden Norway Denmark Estonia Latvia Lithuania	50.3	Direct/ importer/ wholesaler
Coop - food retail - gas marts/convenience - supermarkets - hyper-markets - department stores	Swedish Norwegian Danish	4,514	814	Sweden Norway Denmark	21.4	Direct/ importer/ wholesaler
Axfood - food retail - convenience - discount stores - supermarkets - gas marts/convenience	Swedish	3,351	336	Sweden Norway Denmark	15.9	Direct/ importer/ wholesaler
BergendahlsGruppen - food retail - discount stores - supermarkets	Swedish	1,046	160	Southern Sweden Stockh'lm	8.3	Direct/ importer/ wholesaler
Lidl - hard discount stores	German	529	132	Sweden Finland	2.6	Direct/ importer/ wholesaler
Netto - discount stores	Danish/ Swedish	322	80	Denmark Sweden	1.5	Direct/ importer/ wholesaler

## Finland - Company Profiles

A few central wholesalers (S-Group, K-Group, Tradeka) together dominate the food industry with an aggregate market share of 86.8%. 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 year 2007 was 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 to the Baltic countries have made the Finnish food retail trade part of the EU common market. A number of major mergers and acquisitions took place during 2005-2006, which 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 Tradeka Group 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. 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 41% in 2007.

**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. 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 33.9% of retail food sales in Finland in 2007.

**TRADEKA's** current business structure was formed in 2005, when Cooperative Tradeka Corporation's retail outlets and Wihuri/Ruokamarkkinat Ltd.'s retail chains joined forces to form a new company. As of August 2005, Tradeka Ltd. has been owned by Cooperative Tradeka Corp., Wihuri/Ruokamarkkinat Ltd., members of its cooperative management and



Industri Kapital, a Nordic private equity company. The new Tradeka Ltd. is the third largest actor in Finland's food retail industry and a market leader in the neighborhood shop market. In 2007, Tradeka had a market share of 11.9% of Finland's retail food sales.

**Stockmann Group** is a Finnish company engaged in grocery retailing through its department stores in Finland, Russia and the Baltic countries. Sales in the seven Stockmann department stores accounted for 1.5% of Finland's retail food sales in 2007.

**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 2007, Lidl had 121 outlets throughout Finland and an estimated market share of 4.7%. 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 CY07 (\$ Mill.)	No. of Outlets	Location	Mkt Share	Purchasing/ Agent Type
S-Group - hyper-markets - dept stores - supermarkets - self-service - small shops - discount stores	Finnish	6,691	<b>889</b>	Finland Estonia Latvia Lithuania	41.0	Importer/ wholesaler (Inex)
Kesko (K-Group) - hyper-markets - dept stores - supermarkets - self-service - small shops - discount stores	Finnish	5,530	<b>1,041</b>	Finland Sweden (hardware) Estonia Latvia Lithuania Russia	33.9	Importer/ wholesaler (Kesko Food)
Tradeka - hyper-markets - dept stores - supermarkets - self-service - small shops	Finnish	1,940	<b>754</b>	Finland Russia	11.9	Importer/ wholesaler (Tuko Logistics)
Lidl - hard discount	German	767	<b>121</b>	Finland Sweden	4.7	Importer/ wholesaler
Stockmann Group -department stores	Finnish	253	<b>7</b>	Finland Russia Estonia Latvia Lithuania	1.5	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 Tradeka 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 sq. m. were extended in 2001. This prompted somewhat of a renaissance for small convenience stores. In 2007, grocery sales in convenience stores reached \$1,250 million in Sweden and \$339 million in Finland.

**Gas marts** continue to gain market share in Sweden and Finland, but at a somewhat lower pace. Sales through this channel, 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. 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 2007, 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 2007.

**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, 200 in Estonia, over 300 in Lithuania and about 150 kiosks in Russia. Rautakirja's involvement in Latvia derives from its 50% holding in Narvesen Baltija SIA. Narvesen Baltija is jointly owned by the Norwegian Reitan Narvesen and operates about 400 kiosks in Latvia. In Finland, grocery sales in kiosks reached \$0.5 billion in 2007.

## SWEDEN - MAJOR GAS MARTS AND CONVENIENCE STORES

Retailer Name/ Outlet Type	Ownership	2007 Grocery Sales (US\$ million)	No. of Outlets	Location	Purchasing Agent Type
Statoil/ICA Express, gas mart	Statoil/ICA (Norwegian/Swedish)	565	480	Sweden Norway Denmark	Wholesaler/importer (ICA)
OK/Q8, gas mart	Swedish/Kuwait Petroleum	410	473	Nationwide	Wholesaler/importer (Axfood)
Select, gas mart	Swedish Shell (Dutch/Swedish)	264	233	Nationwide	Wholesaler/importer (Reitan)
Preem, gas mart	Saudi/Swedish	139	217	Nationwide	Wholesaler/importer (Axfood)
Pressbyran, convenience	Reitan Servicehandel (Sweden)	315	323	Sweden Norway Latvia	Wholesaler/importer (Reitan)
Tempo, convenience	Axfood (Swedish)	249	160	Nationwide	Wholesaler/importer (Axfood)
NaraDej, convenience	Menigo Foodservice (Swedish)	162	215	Nationwide	Wholesaler/importer (Menigo Foodservice)
Handlar'n, convenience	Axfood (Swedish)	155	220	Nationwide	Wholesaler/importer (Axfood)

**FINLAND – MAJOR GAS MARTS AND CONVENIENCE STORES**

<b>Retailer Name/ Outlet Type</b>	<b>Ownership/ Partnership</b>	<b>2007 Grocery Sales (US\$ million)</b>	<b>No. of Outlets</b>	<b>Location</b>	<b>Purchasing Agent Type</b>
ABC, gas marts	S-Group	287	90	Nationwide	Wholesaler/ Inex
Neste Pikoil & Quick Shop, gas marts	Neste/Kesko	195	300	Nationwide	Wholesaler/ Kesko
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	502	712	Finland Estonia Latvia Lithuania	Wholesaler/ Importer
Siwa, convenience store	Finnish/ Tradeka	759	548	Nationwide	Wholesaler/ Inex

**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, 2005-2007**

<b>Country Sweden</b>	<b>Import 2005 (\$1,000)</b>	<b>Import 2006 (\$1,000)</b>	<b>Import 2007 (\$1,000)</b>	<b>Market Share %</b>
Denmark	1,330,867	1,597,785	1,852,123	19
Netherlands	1,105,665	1,313,964	1,550,762	16
Germany	971,061	1,083,684	1,260,418	13
Italy	374,092	451,728	519,497	5
France	333,301	383,236	474,817	5
Spain	335,302	380,588	440,929	5
Belgium	286,015	332,073	363,377	4
United Kingdom	251,913	284,340	360,281	4
Norway	250,345	278,210	312,784	3
Finland	201,350	224,958	297,556	3
Ireland	199,352	250,625	270,365	3
<b>Brazil</b>	203,638	215,485	258,275	3
Poland	108,187	150,176	188,395	2
<b>United States</b>	<b>115,747</b>	<b>123,185</b>	<b>137,384</b>	<b>1</b>
Malaysia	26,482	74,941	102,922	1
Other	1,275,368	1,126,292	1,313,561	13
World	7,368,685	8,271,270	9,703,446	100

Source: World 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, 2005- 2007**

<b>Country Finland</b>	<b>Import 2005 (\$1,000)</b>	<b>Import 2006 (\$1,000)</b>	<b>Import 2007 (\$1,000)</b>	<b>Market Share %</b>
Germany	464,636	501,506	614,015	16
Netherlands	401,674	466,217	579,486	15
Sweden	497,396	525,831	576,095	15
Denmark	267,324	299,095	348,414	9
France	164,991	184,722	220,614	5
Spain	144,718	151,132	180,310	5
Belgium	136,328	149,274	176,087	4
Italy	102,171	104,947	127,430	3
Brazil	80,488	88,647	113,125	3
United Kingdom	97,738	108,675	112,174	3
Estonia	42,321	56,372	79,719	2
Poland	39,267	41,028	61,522	2
Norway	43,444	44,830	50,814	1
Colombia	28,550	36,011	43,653	1
<b>United States</b>	<b>35,250</b>	<b>38,131</b>	<b>32,493</b>	<b>1</b>
Other	428,049	453,457	617,712	15
World	2,974,345	3,249,875	3,933,663	100

Source: World 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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Fax: (46-8) 662 8495  
Email: [agstockholm@fas.usda.gov](mailto:agstockholm@fas.usda.gov)

For further information on exporting U.S. agricultural products to Sweden and Finland, please visit the FAS/Stockholm home page at: <http://www.usemb.se/agriculture>

#### SECTION VI. OTHER RELEVANT REPORTS

Report	Link
FI7005 Exporter Guide	<a href="http://intranetapps/GainFiles/200712/146293299.pdf">http://intranetapps/GainFiles/200712/146293299.pdf</a>
SW8012 Exporter Guide	<a href="http://intranetapps/GainFiles/200810/146306289.pdf">http://intranetapps/GainFiles/200810/146306289.pdf</a>