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## Sweden

## Seafood

## 1998

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### Report Highlights:

The fishing industry in Sweden represents only a very small part of the economy but the industry is very important in some coastal areas. Total sea fishery landings amount to around 350,000 to 380,000 metric tons with slight variations between the years. Approximately half of the catches are landed in Denmark. The United States now ranks as the third largest exporter of seafood and products to Sweden, mainly salmon and crayfish.

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Includes PSD changes: Yes  
Includes Trade Matrix: Yes  
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## Executive Summary

The fishing industry in Sweden represents only a very small part of Sweden's economy. The fishing sector amounts to about 0.04 percent (unchanged for the past several years) of the Swedish Gross Domestic Product. Nonetheless, the industry is very important in some coastal areas.

By and large, Sweden is an exporter of raw fish and an importer of processed fish. There is really no prospect of increasing Swedish catches significantly, since fishing is basically restricted to Swedish waters.

Swedish catches in sea fisheries increased in 1997 compared to 1996 both in volume and value. Landings in Denmark continue to increase in volume, and amounted to 175,784 metric tons (about half of total landings for the year) as compared to 171,446 metric tons in 1996, or an increase of 3 percent.

The United States emerged as the third largest supplier of fish and fish products to Sweden in 1997 (having been the fourth largest supplier for several years), after Norway and Denmark (and Iceland). Exports from the United States in 1996 of edible fish & seafood products amounted to SEK 140.1 million (US\$18.4 million). While such trade declined somewhat immediately following EU membership in 1995, more recent levels of U.S. trade have come back from these reduced levels. Crayfish and pacific salmon are the main species imported from the U.S. Market promotional efforts by Alaska Seafood Marketing Institute are under consideration. Such efforts would greatly assist in increasing sales to this very sophisticated market.

Consumption of fish products is increasing, partly as a result of intensive marketing by the Swedish organization "Svensk Fisk," which is supported by the industry and the Swedish government, and also as a result of reduced pesticide levels in fishing waters and aftereffects of the Chernobyl accident when Cesium levels were high.

Imports of fish and products are thus, likely to increase considerably in the next 3-5 year period. Aggressive marketing by U.S. exporters of species, such as salmon, small lobsters, crabs, and catfish would ensure U.S. shares of this potential market in future years.

Sweden, now ranked as number 40 in terms of volume, will maintain a small, but steady part of the world fishery industry.

## Production

PSD Table						
Country:	Sweden					
Commodity:	Groundfish, Whole/Eviscerated					
		1997		1998		1999
	Old	New	Old	New	Old	New
Market Year Begin		00/0000		00/0000		00/0000
Beginning Stocks	0	0	0	0	0	0
Total Production	0	351,253	0	390,000	0	400,000
Intra-E.C. Imports	0	64,000	0	65,000		65,000
Other Imports	0	136,000	0	135,000	0	135,000
TOTAL Imports	0	200000	0	200000	0	200000
TOTAL SUPPLY	0	551253	0	590000	0	600000
Intra-E.C. Exports	0	405,000	0	410,000		415,000
Other Exports	0	45,000	0	50,000	0	55,000
TOTAL Exports	0	450000	0	460000	0	470000
Domestic Consumption	0	101,253	0	130,000	0	130,000
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	0	101253	0	130000	0	130000
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	0	551253	0	590000	0	600000

Swedish catches in sea fisheries in 1997 amounted to 351,253 metric tons, an increase of 5 percent over 1996. Swedish catches landed in Denmark increased to 175,784 tons (171,446 tons in 1996). In value, total landings amounted to SEK 1,005.1 million (US\$ 132 million). The corresponding figure in 1996, was SEK 955.3 million (US\$141 million).

Note: The US dollar strengthened considerably versus the Swedish Krona during 1997, thus US\$1 averaged SEK 6.70 in 1996 and 7.61 in 1997.

Cod and herring are the principal species. The size of the 1997 cod catches amounted to 30,236 metric tons down by over 15 percent because of lower supplies in the Baltic. Other fish of importance are, of course, herring much enjoyed throughout Scandinavia, and salmon. Fish for reduction is the largest single commodity at 254,275 tons (219,584 tons in 1996). Cod and herring together with fish landed for reduction to meal and oil, accounted for over 90 percent of total landings by weight and about 60 percent by value.

The catches in inland waters by professional fishermen in Sweden in 1997, reached 2,011 metric tons. The total value was SEK 43.2 million (US\$5.7 million), up by 7 percent compared to 1996.

The yield of Swedish aqua culture in 1997, was 4,477 metric tons of fish for consumption, which when converted to round fresh weight is the equivalent of 5,276 metric tons, down by 13 percent from 1996. Rainbow trout is the principal species at 4,875 metric tons accounting for 92 percent of total Swedish aquaculture production. Furthermore, there were 1,425 metric tons of cultivated blue mussels harvested, and 8 metric tons of crayfish. The total value of aqua culture production amounted to SEK 128 million (US\$ 17 million).

The table below shows catches in 1997, landed weight by volume and value, and a comparison with 1996:

	1997			1996	
Species	M Tons	1,000 SEK		M Tons	1,000 SEK
Cod	30,236	308,005		35,901	284,655
Herring	44,733	110,388		56,742	154,888
Sprat	4,477	10,171		3,122	10,314
Fish for					
Reduction	254,275	213,485		219,584	153,301
Saith	1,398	9,050		1,499	9,061
Deep Water					
Prawns	1,295	77,339		1,142	71,504
Norway					
Lobster	1,130	71,186		1,104	61,580
Atlantic					
Salmon	495	8,304		583	10,574
Other	13,214	197,125		13,933	199,396
Total	351,253	1,005,053		333,610	955,273

Professional fishermen in Sweden are estimated at around 4,000. The number of registered fishing vessels over 6 meters in length are about 1,800. Of these, 500 vessels are over 12 meters in length.

## Consumption

Consumption of fresh fish almost halved during the 1960's (11.5 kilogram/capita) and declined also in the 1970's to 5.6 kilogram/capita. In the 1980's consumption increased somewhat (6.8 kilogram/capita). In 1997, fresh fish consumption amounted to 7.4 kilograms per capita. Up until mid-1970 consumption of processed and prepared fish products increased from 5 kilograms to about 7 kilograms per capita. From that time, consumption has varied only minimally, in 1997 consumption amounted 7.1 kilograms per capita.

Consumption of frozen fish increased steadily from the beginning of the 1960's (1.1 kilogram/capita) until the end of 1980 (2.7 kilogram/capita). Since then consumption decreased somewhat and in 1997 amounted to 2.3 kilograms per capita.

The National Food Administration distributes food health information pamphlets to the public, which also contains information on pesticide residues in food products together with consumption recommendations. In its latest issue, NFA points out that relatively high levels of mercury are apparent in fish from Swedish lakes and inlets, highest in northern pike, pikeperch, perch, burbot and eel. Pregnant women and breast-feeding mothers should not eat these fish. DDT and PCB residues are found in fish such as herring, salmon and sea trout from the Baltic. The same also applies to dioxin residues, which have been found in the above-mentioned species in the Baltic. Cesium-137 can be apparent in fish from inland waters, in areas affected by the Chernobyl accident in 1986. The county Boards can supply detailed information.

“Nya Svensk Fisk” is an organization partly funded by the government and partly by the industry to increase fish consumption. Future activities will include campaigns targeted for consumers, and institutional markets. The organization represents consumer interest in the Swedish Fisheries Association, National Fisheries Association, National Board of Fisheries.

Government Fisheries Administration Officials are:

The Ministry of Agriculture, Stockholm  
Minister of Agriculture: Ms. Margareta Winberg  
Fisheries Expert Adviser: Mr. Tommie Sjostrom

The National Board of Fisheries  
(Fiskeriverket), Gothenburg  
Director General: Mr. Karl Olov Oster (from September 1, 1998)

The Board is divided into three departments, i.e., Fisheries, Research and Administration. One further department, Swedmar, deals with international assistance and development work. The objectives of the Board are to achieve stability of catches and to maximize long-term yields in both the fishing industry and aquaculture. Ways in which this is done include financial assistance, stock regulating measures (which include a licensing system), price regulations, international negotiations and the provision of information and advice.

The Institute of Marine Research  
(Havsfiskelaboratoriet), Lysekil  
Head of Institute: Mr. Bernt I. Dybern

The Institute of Freshwater Research  
(Sotvattenlaboratoriet), Stockholm  
Head of Institute: Mr. Stellan Hamrin  
Swedish organizations for professional fishermen:

The Swedish Fishermen's Federation  
(Sveriges Fiskares Riksförbund (SFR))  
President: Mr. Reine J. Johansson

The Federation is the link between the Swedish authorities and the fishermen. Virtually every professional fisherman is a member of this organization which has a membership exceeding 4,000.

Following are the regional organizations:  
The Swedish West Coast Fishermen's Central Association  
(Svenska Västskärfiskarnas Centralförbund (SVC))

The Fishermen's Association of Skane  
(Skånes Fiskeriförbund (SF))

The Swedish South Coast Fishermen's Central Association  
(Svenska Sydskärfiskarnas Centralförbund (SSC))

The Swedish East Coast Fishermen's Central Association  
(Svenska Östskärfiskarnas Centralförbund (SOC))

The Swedish Inland Fishermen's Central Association  
(Svenska Inlandsfiskarnas Centralförbund (SIC))

**Trade**

PSD Table						
Country:	Sweden					
Commodity:	Groundfish, Whole/Eviscerated					
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TOTAL Utilization	0	101253	0	130000	0	130000
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	0	551253	0	590000	0	600000

Export Trade Matrix			
Country:		Units:	M TON
Commodity:			
Time period:	CY		
Exports for	1996		1997
U.S.	254	U.S.	250
Others		Others	
Denmark	403,369	Denmark	405,000
Finland	14,789	Finland	15,000
France	14,291	France	14,500
Germany	9,340	Germany	9,400
Norway	7,175	Norway	7,200
Netherlands	5,081	Netherlands	5,000
Russia	4,219	Russia	4,000
Estonia	3,342	Estonia	3,400
Latvia	2,332	Latvia	2,400
Japan	1,082	Japan	2,000
Total for Others	465020		467900
Others not listed	15,109		31,850
Grand Total	480383		500000



Import Trade Matrix			
Country:		Units:	M TON
Commodity:			
Time period:	CY		
Imports for	1996		1997
U.S.	4,281	U.S.	5,000
Others		Others	
Norway	79,871	Norway	80,000
Denmark	50,010	Denmark	50,000
Iceland	5,299	Iceland	4,500
Netherlands	4,587	Netherlands	4,600
Thailand	3,605	Thailand	3,700
Germany	3,507	Germany	3,500
Total for Others	146879		146300
Others not listed	21,965		48,700
Grand Total	173125		200000

FISHERY PRODUCTS STRATEGIC INDICATOR TABLE					
		Previous	Current	Next	
		Year	Year	Year	Pr
U.S. Competitive Position	Measurement *	Situation	Situation	Expectations	Ex
U.S. Access Relative to Rest of World- Non-Tariff Measures (NTM)	Worse, equal, or better (choose one)	Worse	Worse	Worse	Equal
U.S. Access Relative to Rest of World - Tariffs	Higher, equal, or lower (choose one)	Equal	Equal	Equal	Equal
Presence of Marketing Programs (domestic and 3rd country) versus U.S. programs	More aggressive, about the same, or less aggressive (select one)	More aggressive	More aggressive	More aggressive	More
U.S. Prices Relative to Domestic and 3rd Country Prices	Higher, equal, or lower (choose one)	Higher	Higher	Higher	High
U.S. Market Share (3 Year. Average)	Percent	4	3	3	
		Previous	Current	Next	
		Year	Year	Year	Pr
Market Attractiveness	Measurement *	Situation	Situation	Expectations	Ex
Per Capita Consumption of All Fishery Products	Kg per person	16	17	18	
Per Capita Consumption of animal proteins (excluding fishery products)	Kg per person	54	56	56	
Percent of population with refrigerators	Percent	100	100	100	
Percent of fishery product sales at supermarkets	Percent	n/a			
Percent of total food sales at supermarkets	Percent	n/a			
Percent of animal protein sales at supermarkets (excluding fishery products)	Percent	n/a			
Percent of fishery sales at HRI establishments	Percent	n/a			
Percent of fishery sales at open markets	Percent	n/a			
* If an explanation of rating is needed, insert a row and provide an explanation in the row below.					

Requirements for the importation into Sweden of fish and fishery products have been issued by the Swedish National Food Administration (NFA) (Dnr 540/95). These are in accordance with the Council Directive 91/493/EEC of 22 July 1991. Fish and fishery products may be imported into Sweden only if they:

- 1) come from establishments approved by the NFA,
- 2) bear the stipulated stamps or marks (stamps or seals),

3) are accompanied by a health certificate (public and animal health certificate) according to the model prescribed by the NFA,

4) have been notified to the border inspection post in the prescribed manner.

The NFA can provide further information on the above matters, contact:

Senior Inspector Peter Bradenmark (fish questions),  
Senior Veterinary Inspector Wolodia Zbiniewicz (lists of establishments and questions relating to certificates, etc.).

National Food Administration  
P.O. Box 622  
S-751 26 Uppsala, Sweden  
Tel.: (46-18)17 55 00, FAX: (46-18)10 58 48

Regarding labeling it is important to note that Sweden will not accept the name salmon only on a label for any other species than the Atlantic salmon (*Salmo Salar*). Pacific salmon (*Oncorhynchus* spp) must be labeled "Pink salmon or "Keta salmon", etc. This restriction is based on a voluntary agreement between the fishing industry and the trade. The Federation of Swedish Fish Industries & Wholesalers has published a list of acceptable common names to avoid confusion in this matter. The list is available in Swedish only, any questions may be directed to FAS/S.

FAS/S is working closely with the National Marine Fishery Service representative in Europe, Mr. Eric Fleury in Brussels. Mr. Fleury can be contacted at the following address: U.S. Mission to the European Communities, Bd. du Regent 40, B-1000 Brussels, Belgium, Tel.: (32) 2 508 2769, FAX: (32) 2 513 1228. FAS/S will, as market conditions dictate and resources allow, provide assistance to American business representatives or interested Swedish/Finnish/Norwegian/Estonian/Latvian country business or government representatives to facilitate U.S. seafood sales, support foreign-based representatives of U.S. fishery products firms which market seafood in the four countries of post's responsibility. Assist U.S. seafood representatives in product presentations and sales, and make approaches to the host governments and businesses on behalf of U.S. fishing industry interests in order to further exports of U.S. seafood.

None of the three nonprofit trade promotion groups funded by FAS is active in Sweden or the other four countries under FAS/S. However, promotional efforts by Alaska Seafood Marketing Institute are under consideration. SUSTA in conjunction with Louisiana Department of Agriculture is planning a renewed marketing effort in Sweden together with producers of Louisiana crayfish in 1999. Such efforts would greatly assist in increasing sales to these markets.

## Policy

Sweden is a member of the Fisheries Commission for the Baltic Sea. In early September 1998, the commission met in Warsaw to decide on fishing quotas for 1999. Over-fishing of cod in the Baltic has been a serious problem for several years. The International Council for Exploration of the Sea (ICES) earlier recommended a total stop for cod fishing in the Baltic, which was strongly opposed by Sweden and the EU. Cod fishing is the most important (economically) part of the Swedish fisheries' industry, and the industry has already been seriously hurt by the dwindling resources of cod in the Baltic. The treaty countries have now agreed on the 1998 quotas (TAC) in the Baltic. The quotas are given below, Sweden's approximate shares within parentheses:

Herring 570,000 tons (137,367 tons)  
Sprat 468,000 tons ( 80,250 tons)  
Cod 126,000 tons ( 26,499 tons)  
Salmon 410,000 number (112,661 number)\*

\*Salmon quotas are given in number of fish.

Total TACs for herring, sprat and cod are lower than in 1998. The Commission earlier decided on a plan for the Baltic salmon harvests which has been further developed and agreed upon by the member states. Summer fishing prohibition has been put forward two weeks to increase protection of the wild salmon spawning. The salmon total allowable catch for 1999 has been kept at the same level as in 1998, however.

The cod TAC has again been reduced from 140,000 tons in 1998 to only 126,000 tons in 1999.

One positive effect of the Swedish membership in the EU, is that the procedure to transfer quotas between member countries has become much easier than from third countries. If member countries are in agreement, the transfer can take place immediately. The only requirement is that the Commission be notified.

For the first time in the Fishery Commission history, a meeting has been held open to a number of environment organizations and other interests. This is part of the Baltic Agenda 21 preparations to create a long term sustainability plan for fishery and environment in the Baltic area.

## Marketing

The major canning company in Sweden is ABBA Seafood. ABBA (AktieBolaget Broderna Ameln) includes production and marketing of ABBA fishery products in Sweden, Denmark and Germany. In addition, marketing offices have been established in Norway, Poland, Finland and Austria. In Sweden, ABBA produces pickled herring in glass jars, anchovies and caviar (Kalle's caviar in a tube). Other important fish industries include Skandiakonserv AB (pickled herring, lye fish production), Findus, owned by Nestle AB (producing ready-made dishes), Felix (pickled herring), and Festab AB (gratins, breaded fish products, fish sticks, etc. for the institutional market).

The United States has emerged as the fourth largest supplier of fish and fish products to Sweden, after Norway, Denmark and Iceland. Exports from the United States in 1996 amounted to USD 18 million. It is estimated that at least another USD 10 million has been imported, but these imports are shown under the Netherlands, as EU imports are not shown separately.

Starting in 1988, the United States became the principal supplier of crayfish to Sweden. Before that Turkey had been the leading supplier, but the Turkish waters were hard hit by the crayfish fungus which earlier had all but wiped out the native Swedish crayfish population. Each year, beginning in early August, Swedes hold crayfish parties which are a national tradition dating back centuries. About 3,000 tons of the special dill flavored crayfish are consumed per year, of which approximately 2,500 tons are imported. Only frozen, precooked crayfish is imported from the United States, primarily from Louisiana, where several Swedish wholesalers have established their own factories and oversee the production. The crayfish, which must not be less than 9 cm in length, are cooked in a special dill flavored brew according to old Swedish recipes.

Average rates of exchange used in this report are:

CY 1996 USD 1.00 = SEK 6.70

CY 1997 USD 1.00 = SEK 7.61