



The Swedish Market

Fresh fruit and vegetables



**Open Trade
Gate Sweden**
National Board of Trade

The purpose of the market study

The purpose of this market study is to offer a comprehensive guide for companies that are interested in entering the Swedish market for fresh fruit and vegetables. It aims to offer valuable insights and support actionable strategies for exporters of fresh fruit and vegetables to establish a foothold in Sweden. The study provides an overview of the Swedish market in this sector; outlines important trends; details regulatory requirements; and offers guidance on how to identify and secure business partners.

This market study is intended for companies in developing countries interested in entering the Swedish market for fresh fruit and vegetables.

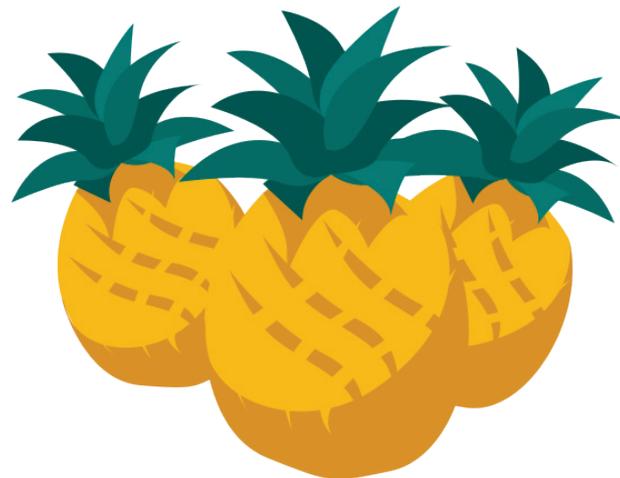


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Get to know the Swedish market

The Swedish market for fresh fruit and vegetables is largely dependent on imports. In order to understand the Swedish market for these products it is essential to have knowledge of Swedish consumption, European imports, as well as seasonality and Swedish demand.

Swedish consumption

Overall, Swedish consumer spending on fruit and vegetables has increased since 2016.¹ However, inflation-adjusted sales have been relatively low since 2022. This is because prices have surged since then. Fruit prices rose by 9.5 per cent in 2022, followed by a further 9.4 per cent in 2023. Vegetable prices increased by even more – 10.3 per cent followed by 16.3 per cent. This affected sales, especially the sales of vegetables.

In 2023, inflation-adjusted sales of vegetables dropped by a further 6.0 per cent. As regards fruit, however, such sales recovered somewhat, with 3.7 per cent growth. The market has recently seemed to be rebounding, as grocery stores' fruit and vegetable sales grew by 3.3 per cent in the first half of 2024² compared to the same period in 2023.

Table 1. Sales of fruit and vegetables in the retail trade, in SEK million (current and fixed prices)

Year	2016	2017	2018	2019	2020	2021	2022	2023
Fruit (current)	18,833	19,833	20,869	20,793	22,392	21,913	21,947	24,913
Fruit (fixed)	10,270	10,331	10,221	10,447	10,577	10,707	9,803	10,162
Vegetables (current)	26,000	27,273	29,124	29,705	31,793	31,761	33,331	36,415
Vegetables (fixed)	20,290	21,004	21,599	20,274	21,585	21,821	20,761	19,507

Source: SCB

Note: 'Fixed prices' adjust for inflation by keeping prices constant relative to the base year 2016. 'Current prices' include the effects of inflation.

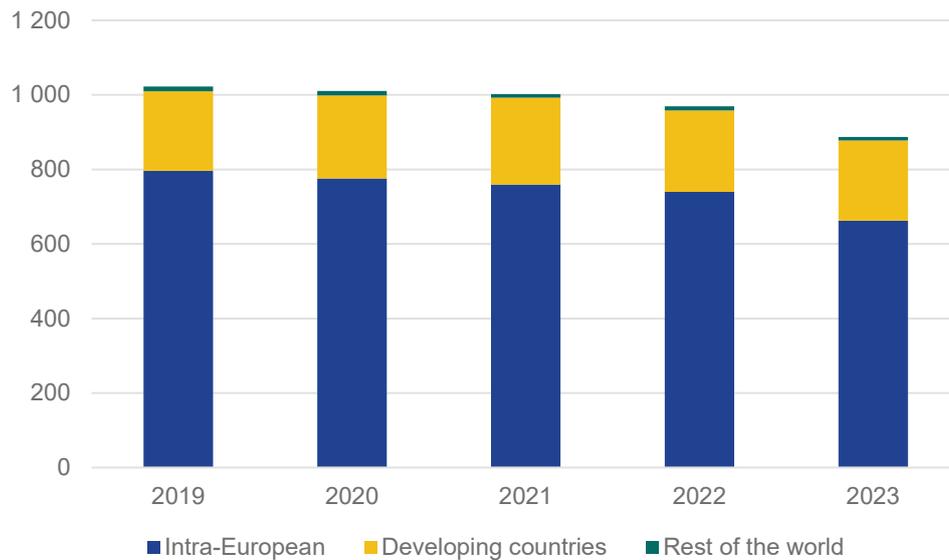
¹ SCB. [Livsmedelsförsäljningsstatistik 2023](#)

² Svensk Dagligvaruhandel. [Dagligvaruindex Frukt och grönt 2004 Q2](#)

Swedish imports

Sweden relies heavily on fresh fruit and vegetable imports. As a result, with consumption slowing down due to high prices, imports followed a similar trend. They remained relatively stable at around 1 million tonnes until 2021, before falling to 887 thousand tonnes in 2023.

Figure 1. Swedish imports of fresh fruit and vegetables per supplying region, in thousand tonnes



Source: UN Comtrade

Interestingly, this decrease was mainly due to a consistent drop in imports from other European countries. At the same time, the direct import market share of developing countries grew from 21 per cent in 2019 to 24 per cent in 2023.

In 2023, developing countries supplied Sweden with 215 thousand tonnes of fresh fruit and vegetables. These primarily consisted of bananas (74 per cent), followed by oranges (6 per cent), apples, mandarins and potatoes (2 per cent each).



Table 2. Swedish imports of fruit and vegetables from the top ten developing countries, in thousand tonnes

	2019	2020	2021	2022	2023	CAGR*	Main products
Ecuador	83	99	114	85	73	-3.2%	Bananas
Colombia	2.4	11	14	23	36	+97%	Bananas
Costa Rica	28	20	10	15	21	-6.8%	Bananas Pineapples
Turkey	8.0	12	14	14	15	+16%	Various
Egypt	13	10	12	10	12	-1.5%	Oranges Potatoes
Dominican Republic	30	25	16	20	12	-21%	Bananas
Panama	16	10	14	16	11	-9.5%	Bananas
South Africa	7.5	9.2	11	10	9.4	+5.9%	Oranges
Nicaragua	0.0	1.5	6.1	5.5	5.6	+308%	Bananas
Morocco	8.9	10	7.6	5.8	4.4	-16%	Mandarins Clementines

Source: UN Comtrade

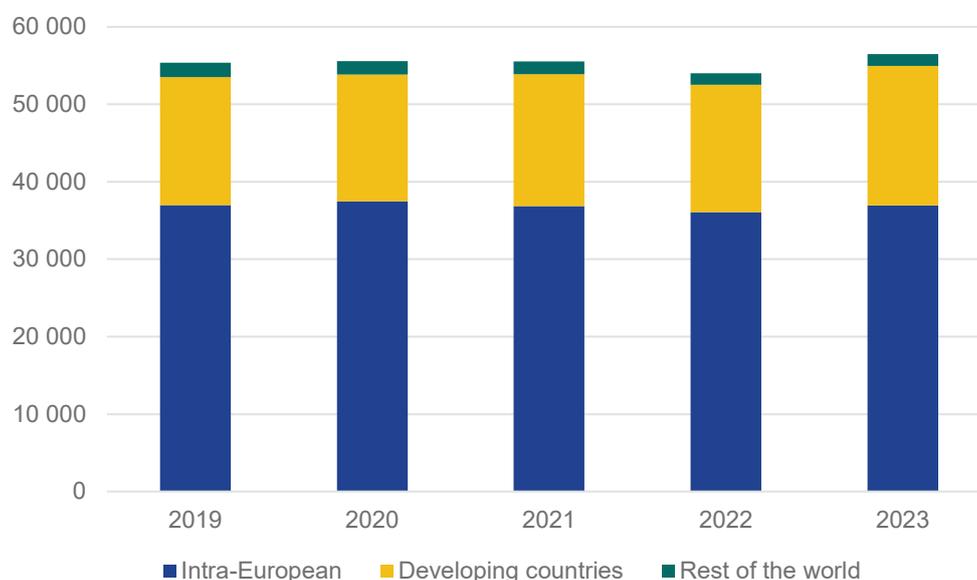
*CAGR = Compound Annual Growth Rate

European imports

Europe is a major player in the fresh fruit and vegetable sector, with traders operating globally, including in developing countries. Its import market is substantial and relatively stable at around 55 million tonnes, requiring a year-round supply of counter-seasonal products and exotics. Swedish imports represent about 2 per cent of this market.

Countries in Northern and Western Europe (Netherlands, Germany and Denmark) also act as important hubs for re-exports to Sweden.

Figure 2. European imports of fresh fruit and vegetables per supplying region, in thousand tonnes



Source: UN Comtrade

Developing countries provide nearly a third of Europe's fresh fruit and vegetable imports. In 2023, they supplied 18 million tonnes. This mainly consisted of bananas (37 per cent), followed by oranges (6 per cent), tomatoes (6 per cent), pineapples (5 per cent), avocados (5 per cent), grapes (4 per cent) and watermelons (4 per cent).

Table 3. European imports of fruit and vegetables from the top ten developing countries, in thousand tonnes

	2019	2020	2021	2022	2023	CAGR	Main products
Costa Rica	2,588	2,519	2,569	2,402	2,421	-1.6%	Bananas Pineapples
Ecuador	1,761	1,880	2,005	1,760	2,072	+4.2%	Bananas
Morocco	1,754	1,884	2,051	2,187	2,039	+3.8%	Tomatoes
Colombia	1,554	1,607	1,621	1,688	1,806	+3.8%	Bananas
Egypt	1,078	959	959	902	1,579	+10%	Oranges Potatoes
South Africa	1,332	1,439	1,526	1,580	1,557	+4.0%	Oranges Grapes
Peru	860	931	1,050	1,029	1,060	+5.4%	Avocados
Turkey	654	811	883	834	998	+11%	Various
Brazil	716	729	795	667	752	+1.2%	Various
Côte d'Ivoire	507	401	435	466	460	-2.4%	Bananas

Source: UN Comtrade

As a proportion of all European imports, Swedish (banana) imports from Nicaragua, the Dominican Republic, Panama and Ecuador are relatively high. However, Sweden hardly imports any fresh fruit or vegetables from Peru, Côte d'Ivoire and Brazil.

Did you know that...

...fruit and vegetables are the largest category of grocery sales in Sweden, representing 16 per cent, followed by meat (14 per cent), and dairy products, bread/cereals, and alcoholic beverages (13 per cent each).³

...you can find out much more about the European market for fresh fruit and vegetables on the [website of CBI](#), the Dutch Centre for Promotion of Imports from developing countries.

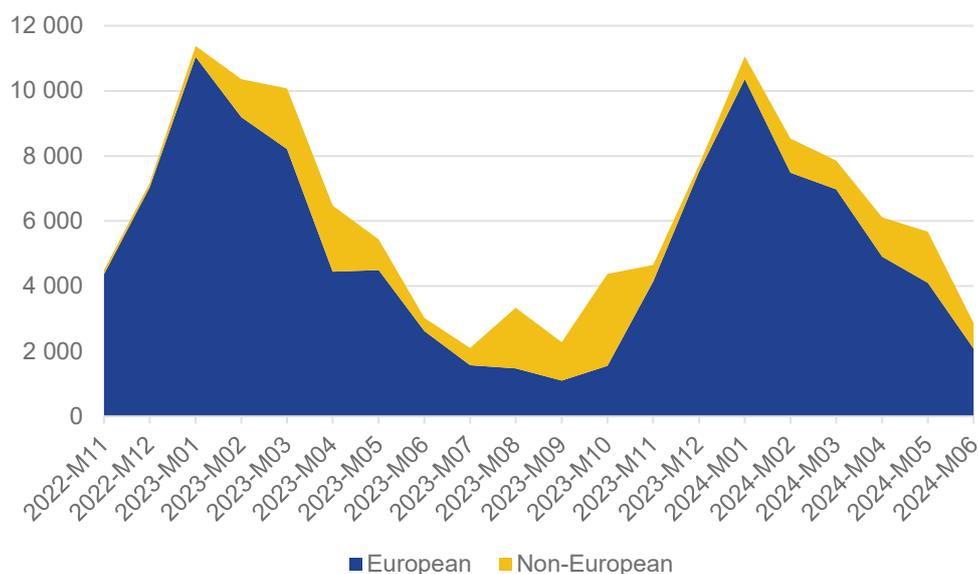
Seasonality and Swedish demand

Sweden's dependence on imports varies both per product and per season. Fruit and vegetables that cannot be produced in the Swedish climate – such as bananas and citrus fruits – must be imported. For products that are produced in Sweden, the degree of dependency on imports is very variable. As regards carrots, for example, Sweden is almost entirely self-sufficient throughout the year. However, its local supply of products such as tomatoes and apples must be supplemented by imports.

Seasonality plays an important role in both Swedish and European demand for imports of fresh fruit and vegetables. Products that are only available locally during certain months of the year offer opportunities for producers who can supply during the other months. For example, Swedish demand for cucumber is covered by domestic production in summer, but from October till May, it is entirely reliant on imports of cucumbers, primarily from Spain, followed by the Netherlands, Germany and Jordan.

European seasonality also plays a role in Swedish imports, including imports of oranges for example. Spain is Europe's main producer of oranges, as well as Sweden's largest supplier. For suppliers from developing countries in the Southern Hemisphere, there are particularly interesting opportunities during Spain's off-season – between May and November.

³ SCB. [Livsmedelsförsäljningsstatistik 2023](#)

Figure 3. Swedish imports of oranges per supplying region, in tonnes per month

Source: ITC TradeMap

During Spain's off-season, Sweden imports oranges both directly from South Africa as a producer and indirectly via the Netherlands and Germany as trading hubs. Egypt, whose season overlaps with that of Spain, manages to supplement the supply to Sweden during the high season.

Did you know that...

...the German Import Promotion Desk has published a [seasonal calendar](#) for fruit and vegetables in Europe.

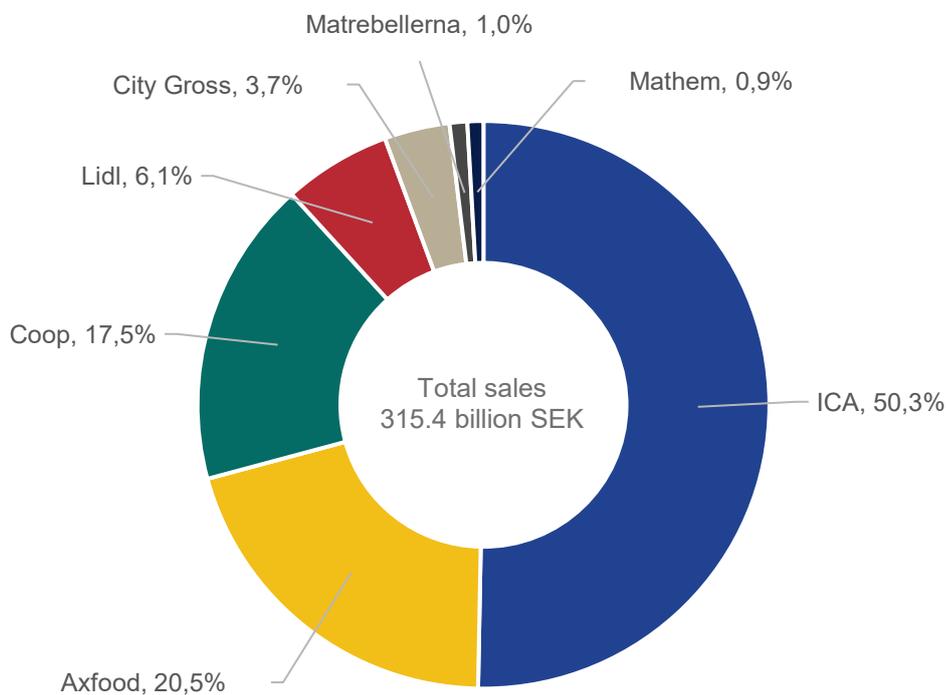
...the European Commission's [Access2Markets](#) portal offers a user-friendly database where you can find trade statistics for specific products. While this study focuses on the sector, the platform provides trade data on fruit and vegetables at product level. Find your product code and look up exports from your country to Sweden (and the EU) during the past few years.

Understand the market structure

Market segments

While there are more than 3,000 food retail outlets in Sweden, the major supermarket chains dominate the Swedish grocery market. In addition to groceries, they also offer clothing, home textiles, garden articles and much more. The large supermarkets and hypermarkets in particular are becoming increasingly important in the Swedish market.

Figure 4. Market shares of the largest grocery retail brands, 2022



Source: Dagligvarukartan

Among these chains, ICA holds about half of the market share, followed by Axfood (including supermarkets Willys and Hemköp), Coop, Lidl and City Gross (acquired by Axfood in 2024). There are also some smaller retailers, but their market share is limited.

One interesting development is that Lidl Sweden is growing more than twice as fast as the rest of the market – 18 per cent compared to 6.8 per cent. 2022/20223 was the sixth season in a row that Lidl Sweden grew faster than the rest of the industry.⁴

⁴ discountretailconsulting.com/post/sweden-record-year-lidl-sweden

The food service industry is another important segment. In this segment, wholesalers supply hotels and restaurants. The main players here include Martin & Servera, Menigo and Svensk Cater.

Fruit and vegetables processing is the third segment for fresh fruit and vegetables. Of particular importance within this segment are fresh juice producers, who produce juice from fresh fruit and vegetables. Examples are Brämhults and Råsaft.

Importers and distribution channels

Many fresh fruit and vegetables enter the Swedish market through Helsingborg on the south coast. This is where you will find the largest importers, which also act as distributors and sourcing companies. Nordic market leader Dole includes various large companies like Everfresh and Interbanan Scandinavia AB (organic bananas). ICA Frukt & Grönt is Sweden's largest retail buyer. Other key players include BAMA, Ewerman and Fruit Connect.

Fresh fruit and vegetables spend time in transit from producer to retailer, being sorted, washed and packaged before shipment. Upon entry into Europe, the importer sometimes re-packages the products before they reach retailers and the food service market.

Note that the largest volumes reach Sweden through hubs in other European countries. One of these hubs is the Netherlands, with the Port of Rotterdam being the most important gateway to Europe for fresh fruit and vegetables.

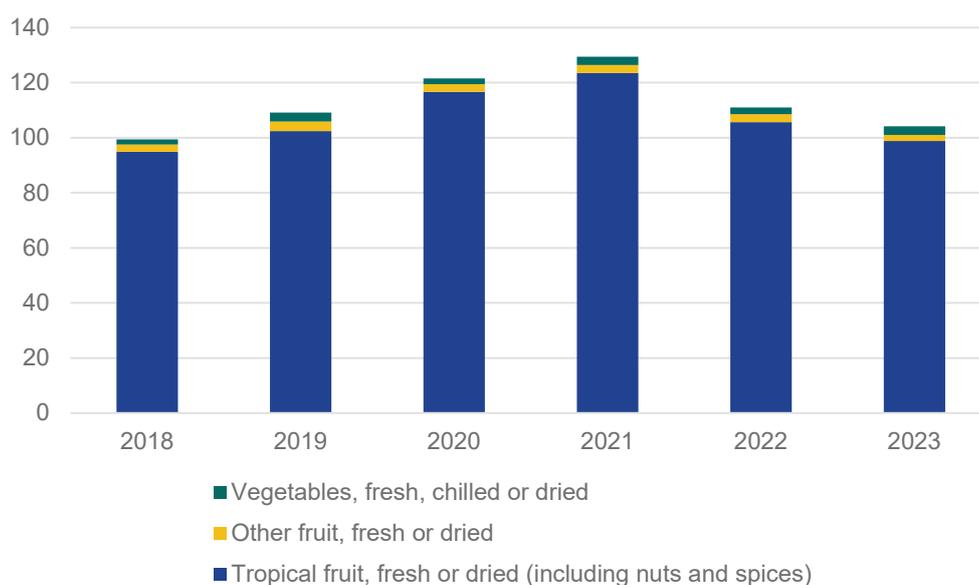
Keep up with the trends

Swedish consumers are becoming increasingly interested in the origin of the fruit and vegetables they buy, as well as the healthiness of the food they eat. This is also reflected by Sweden's sixth position in the list of the largest organic agri-food importing countries in Europe.

A leading market for sustainable and organic produce

Sweden is a strong market for sustainable products, but recent price rises have put pressure on sales. The sales values of organic goods grew steadily until 2020⁵, but they have declined since then. By 2023, Swedish sales of organic fruit had decreased by -8 per cent, while those of organic vegetables fell by -17 per cent. However, the market appears to be recovering. In the fourth quarter of 2023, larger volumes of organic fruit and vegetables were sold than in the same period of 2022.⁶ This trend is set to continue, as the value share of organic produce in Sweden's grocery trade is once again growing slowly in 2024.⁷

Figure 5. Swedish imports of organic fruit and vegetables, in thousand tonnes



Source: TRACES

After fish, fruit is the second largest category in the food segment as regards share of organic products (12.9 per cent of all fruit sales is organic).⁸ As regards vegetables, the organic market share is 8.3 per cent. This offers opportunities, as around half of all organic fruit and vegetables sold consists of imported products that cannot be

⁵ SCB. [SCB. Livsmedelsförsäljningsstatistik 2023](#)

⁶ Organic Sweden and Ekologiska Lantbrukarna. [Ekologiska årsrapporten 2023](#)

⁷ Svensk Dagligvaruhandel. [Webbinarium: Hur förändrat är konsumenternas köpbeteende? Okt. 2024](#)

⁸ SCB. [Livsmedelsförsäljningsstatistik 2023](#)

produced in Sweden.⁹ In terms of value, bananas are the largest category – 58.9 per cent of bananas sold in 2023 were organic, representing 36 per cent of all sales of organic fruit and vegetables in Sweden.

As Europe’s sixth largest importer of organic agri-food products¹⁰, Sweden is home to 310 importers of organic products and 1,093 processors¹¹. The country’s organic fruit and vegetable imports peaked in 2021 at 129 thousand tonnes. After that, they declined to 104 thousand tonnes in 2023. Most of these imports are bananas from Ecuador (66 thousand tonnes in 2023), Colombia (17 thousand tonnes) and the Dominican Republic (14 thousand tonnes). As Swedish consumption of organic fruit and vegetables rebounds in the coming years, imports are likely to follow suit.

Increased private label market share

Private labels – i.e. retailers’ own brands – are increasing their share in general in Europe, including Sweden and the food market. This is being boosted by recent price increases, driving consumers to opt for cheaper alternatives. The share of private labels in fruit and vegetables (both fresh and processed) amounted to about 40 per cent in 2023.¹² The big retailers are the main players in this trend. They are continuing to develop ranges which also include fresh fruit and vegetables. Private labels also include organic, such as ICA’s “I love eco” and COOP’s “Änglamark”.

Grocery market in Sweden growing slowly with online sales driving growth

Online grocery sales grew rapidly between 2020 and 2021 due to the pandemic-related lockdowns. Both online-only companies and traditional grocery retail chains benefited from this. Although online grocery sales growth declined since 2021, online food sales have been outperforming the rest of the market. In 2023, e-commerce accounted for a market share of about 4.1 per cent.¹³ These sales consist of relatively equal shares of store pick-ups and home deliveries.

Did you know that...

...you can find several good sources of information online where you can follow trends and developments, for example FreshPlaza, FreshFruitPortal and FruiTrop.

...whether your products fit the trends in the Swedish market may be a matter of how you market them – for example, you can highlight your products’ vitamin content or your organic production methods in your marketing.

⁹ Organic Sweden and Ekologiska Lantbrukarna. [Ekologiska årsrapporten 2023](#)

¹⁰ European Commission. [EU imports of organic agri-food products – Key developments in 2022](#)

¹¹ FiBL. [The World of Organic Agriculture 2024](#)

¹² SCB. [Livsmedelsförsäljningsstatistik 2023](#)

¹³ Savills. [European Grocery Market 2024](#)

Live up to the requirements

Mandatory requirements

To export fresh fruit and vegetables to Europe, including Sweden, you must meet various legal requirements. These mainly focus on food safety and quality. Products that do not meet these criteria are banned and/or must be withdrawn from the market. The main topics include:

Pesticide residues, contaminants and micro-organisms

The EU has set maximum (residue) levels for pesticides¹⁴ and contaminants¹⁵, such as heavy metals. It has also defined microbiological criteria for certain micro-organisms in fresh pre-cut fruit and vegetables, like viruses, parasites and bacteria.¹⁶ To properly control food safety, you should implement a food safety management system based on hazard analysis and critical control point (HACCP).¹⁷

Phytosanitary certificates

To prevent the spreading of harmful organisms in Europe, the EU has introduced a phytosanitary system.¹⁸ Imported fruit and vegetables require a phytosanitary certificate guaranteeing that they have been properly inspected and are free from quarantine pests (within the requirements for regulated non-quarantine pests and practically free from other pests), and in line with Regulation (EU) 2019/2072¹⁹. Pineapples, bananas, coconuts, durians and dates are exempt from this requirement.

Marketing standards

To promote quality, the EU has introduced specific marketing standards for ten fruits and vegetables.²⁰ Other fruit and vegetables must comply with the EU's general marketing standards²¹ or the applicable United Nations Economic Commission for Europe (UNECE) standard²².

Traceability

The General Food Law Regulation²³ requires food to be traceable throughout the production and distribution chain. To facilitate this, you must document the sources of your products and be able to provide proof of origin.²⁴

¹⁴ European Commission. [EU Pesticides Database](#)

¹⁵ European Commission. [Contaminants](#)

¹⁶ EUR-Lex. [Commission Regulation \(EC\) No 2073/2005 of 15 November 2005 on microbiological criteria for foodstuffs](#)

¹⁷ [Hazard analysis and critical control point \(HACCP\)](#)

¹⁸ European Commission. [The EU: a common market for plants and plant products](#)

¹⁹ EUR-Lex. [Regulation \(EU\) 2019/2072](#)

²⁰ European Commission. [Marketing standards](#)

²¹ EUR-Lex. [Regulation \(EU\) No 543/2011](#)

²² UNECE. [Standards for fresh fruit and vegetables](#)

²³ EUR-Lex. [Regulation \(EC\) No 178/2002](#)

²⁴ European Commission. [Proof of origin](#)

Labelling and packaging

All fruit and vegetables marketed in the EU must comply with its labelling and packaging rules²⁵, to provide consumers with all the information they need to make an informed choice and prevent any risk to their health. Trade packaging labels must include information such as the name and address of the packaging company or shipper, name and variety of the produce, class and size, country of origin, lot number, and post-harvest treatment. These labels can be in English.

The EU has additional requirements for products that are pre-packaged for retail.²⁶ Consumer-facing labels must include information such as the common name of the product, net content in weight, allergenic declaration (if applicable), country of origin, name and address of the party in the EU who places the product on the market, and producer identification or lot number. These labels must be in Swedish, so they are easy to understand for consumers.

Standards and certification

Buyers often have specific additional requirements to prove compliance with EU legislation or meet the standards in their particular (niche) market segment.

GLOBALG.A.P.

[GLOBALG.A.P.](#) certification has now become a prerequisite for exporting to supermarket-dominated countries such as Sweden, rather than an added value. It includes food safety and traceability, environmental and social welfare, as well as HACCP.

Food safety certification

Food safety certification is a must-have for cut and pre-packed fresh fruits and vegetables. Buyers generally require certification recognised by the [Global Food Safety Initiative](#) (GFSI), like [FSSC 22000](#).

Social and environmental standards

GlobalG.A.P. GRASP (GlobalG.A.P. Risk Assessment on Social Practice) is a socially focused standard designed to assess and improve the social practices of agricultural producers. GRASP is an optional module for farms already certified under GlobalG.A.P.

Another common social compliance methodology in agricultural production and trade is [SMETA](#) (Sedex Members Ethical Trade Audit). SMETA is an internationally recognised social auditing methodology developed by Sedex (Supplier Ethical Data

²⁵ European Commission. [Labelling and packaging](#)

²⁶ EUR-Lex. [Regulation \(EU\) No 1169/2011](#)

Exchange). It is used to assess responsible business practices in areas such as labour rights, health and safety, the environment and business ethics.

[Fairtrade](#) certification is (until now) mostly applied to the largest fresh fruit category, bananas. [Rainforest Alliance](#) is another certification scheme and has so far also predominantly been used for the largest crops such as bananas and oranges.

Organic certification

To market organic products in Europe, you must comply with EU legislation for the organics sector²⁷ and apply for [EU organic certification](#). Sweden also has the [KRAV](#) standards, which are aligned with EU standards, although they are stricter in some cases. KRAV is widely known among Swedish consumers.

Figure 6. The Swedish KRAV logo and the EU organic logo



Source: KRAV and the EU organic logo

Did you know that...

... the European Commission's [Access2Markets](#) portal lists the requirements that apply to your product. You can also find out more about the requirements your products must comply with in order to be allowed on the European market on [CBI's website](#). The Swedish Food Agency provides information about imports of products like fruit and vegetables from non-EU-countries.²⁸

...you can look up standards for your sector and products in a specific market (Europe/Sweden) on [ITC's Sustainability Map](#), which enables you to compare them both with respect to each other and with your own performance.

...the EU provides a good overview summarizing the legislation for organic²⁹, which establishes the minimum requirements in order for a product to be marketed as "organic" in the EU.

²⁷ European Commission. [Legislation for the organics sector](#)

²⁸ Swedish Food Agency. [Import from countries outside the EU – food of non-animal origin](#)

²⁹ European Commission. [Trade in organics](#)

Find a business partner

Where can you find Swedish buyers?

Trade fairs

Trade fairs continue to be of great importance when it comes to finding and meeting buyers in Europe and Sweden. They also offer a good starting point for keeping up with trends.

The most important fairs for fresh fruit and vegetables are:

- [Fruit Logistica](#) – February in Berlin, Germany
- [Fruit Attraction](#) – October in Madrid, Spain
- [Biofach](#) for organic produce – February in Nuremberg, Germany

Did you know that...

...trade fairs are not only excellent places to meet buyers, but also a great place to learn about new trends in the sector.

...if you cannot visit or exhibit at a trade fair, you can always find useful information on the trade fair's website.

Online platforms

Of course, you can also find buyers outside trade fairs. Online platforms like FreshPlaza offer information on both markets and players, plus the chance to promote your company. Social media also provide good opportunities for finding new contacts and presenting yourself. Many players in the Swedish market have profiles on LinkedIn.

Direct contact

You can reach out to the larger retailers directly. They have information on their websites, such as their private label purchasing process.

However, you find your potential buyers, remember to research them before approaching them. What is their role in the supply chain? What products do they trade in? In addition, you need a good understanding of the Swedish market and business culture to build a successful business relationship.

Swedish business culture

Swedes are proud of their **Swedish traditions**, yet they are also open to **innovation**. This also forms the basis for market trends where traditional local fruits and vegetables are appreciated, alongside an appetite for new experiences and flavours.

Work-life balance is highly valued, meetings are scheduled during office hours, and **punctuality** is important. In Sweden, gender **equality** is key; men and women are equal in every aspect of life.

Hierarchies are flat, and everyone is invited to share their opinions. This openness also translates into honesty – Swedes are **transparent** and expect their business partners to be too: if there's a problem or changes occur, be open about it and proactively share the necessary information.

Did you know that...

...the Swedes have a special word for quality-time coffee breaks: "fika". You can enjoy a "fika" with colleagues at work, or with friends in your spare time.

...when a child is born, the law encourages the father to take paternity leave. It is common for men to take three to six months of paternity leave.

... Open Trade Gate Sweden offers a [guide to effective online business communication](#) with international buyers.



Where can you find out more?

The information provided in this study is partly based on information obtained from the various players in the Swedish market. Many of them provide good, regularly updated information online. In addition, Open Trade Gate Sweden's partners offer European market information for several topics.

Check out, for instance:

- [The Swedish Board of Agriculture](#), the Swedish Government's expert authority on matters of agri-food policy, responsible for the agricultural and horticultural sectors
- [CBI's market information](#) on exporting fresh fruit and vegetables to Europe
- [ITC's market analysis tools](#) on various export-related topics
- [ITC's SME Trade Academy](#) offers e-learning courses on several export-related topics
- [IPD's market information](#) on certain sectors and export-related topics