The Swedish Market
Processed food

Open Trade
Gate Sweden
National Board of Trade

The purpose of the market study

The purpose of this market study is to offer valuable insights and support actionable strategies for exporters of processed foods to establish a foothold in Sweden. It aims to present an overview of the current situation in the Swedish market, how Swedish buyers choose their suppliers, and the buying process.

The study is intended for companies in low- and middle-income countries wishing to export processed food to Sweden.

Definition of “’processed foods’’

“Processed foods" are defined as food products that have undergone various methods of preservation, preparation, or transformation to extend their shelf-life, enhance safety, or improve convenience. This covers a broad range – from minimally processed items such as pasteurised milk to more complex products such as canned vegetables, cheeses and ready meals. The report categorises processed foods into distinct groups to provide clarity on the degree and purpose of processing, which aids in understanding their role in the Swedish food market.

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The Swedish market for processed foods

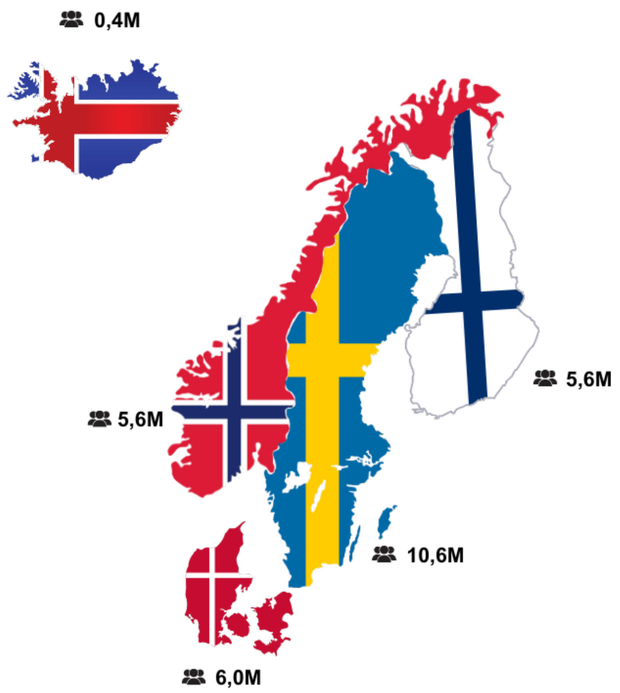
A brief introduction to the Nordic food market

- Total Nordic grocery retail turnover: approximately SEK 1,060.9 billion
- Sweden's share of Nordic turnover: approximately 32 per cent
- Sweden's share of the Nordic population: approximately 38 per cent

Table 1. Population and approximate grocery retail turnover per Nordic country

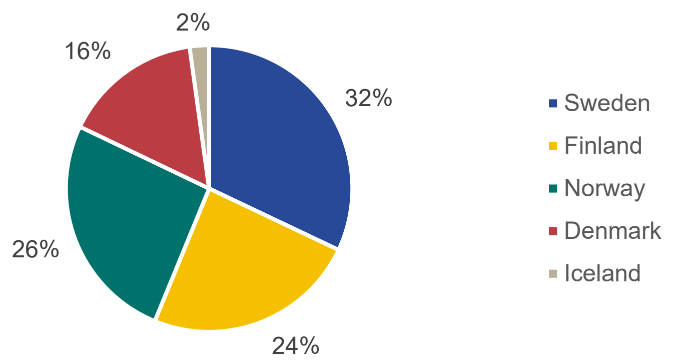
Country	Population	Grocery retail turnover (local currency) 2024	SEK equivalent	Source
Sweden	10.6 million	SEK 340 billion	SEK 340 billion	Marketscreener
Finland	5.6 million	EUR 23.5 billion	≈ SEK 256.2 billion	Finnish Grocery Trade Association
Norway	5.5 million	NOK 294.6 billion	≈ SEK 274.8 billion	Statistics Norway (SSB)
Denmark	5.9 million	DKK 114.2 billion	≈ SEK 166.7 billion	Statistics Denmark, Retail trade index
Iceland	0.4 million	ISK 311.8 billion	≈ SEK 23.2 billion	Statistics Iceland

Figure 1. Number of inhabitants of the Nordic countries, million



This indicates that, while Sweden has a significant share of the Nordic population, its share of the grocery retail market turnover is proportionally lower, suggesting differences in per capita spending and market dynamics across the Nordic countries.

Figure 2. Share of grocery retail turnover in the Nordics per country



Statistics concerning imports to Sweden

Sweden imported approximately SEK 225.3 billion worth of agricultural and food products in 2024, maintaining a similar level to 2023. The 2024 report highlights notable year-on-year import value increases in categories such as coffee, tea and cocoa (+16 per cent), fruit and vegetables (+3 per cent), beverages (+5 per cent) and dairy products (+2 per cent). Imports of oil seeds, oils and fats declined by 21 per cent and 3 per cent respectively.

Table 2. Imports of agricultural and food products to Sweden per subcategory

Product category	Import 2023 (MSEK)	Import 2024 (MSEK)	Share of total 2024 (%)	Change (%)
Meat and meat products	18,900	18,490	8%	-2.2%
Dairy products and eggs	15,374	15,738	7%	2.4%
Fish, crustaceans and molluscs	69,572	65,737	29%	-5.5%
Cereals and cereal products	14,107	14,397	6%	2.1%
Fruit and vegetables	31,039	32,005	14%	3.1%
Sugar, sugar products and honey	6,138	6,398	3%	4.2%
Coffee, tea, cocoa and spices	15,069	17,425	8%	15.6%
Animal feed	7,103	7,561	3%	6.4%
Miscellaneous food preparations	14,517	14,484	6%	-0.2%
Beverages	18,365	19,212	9%	4.6%
Oilseeds and oleaginous nuts	1,960	1,541	1%	-21.4%
Oils and fats	12,723	12,298	5%	-3.3%
TOTAL	**224,867**	**225,286**	**100%**	**0.2%**

Source: Swedish Board of Agriculture and Statistics Sweden[1]

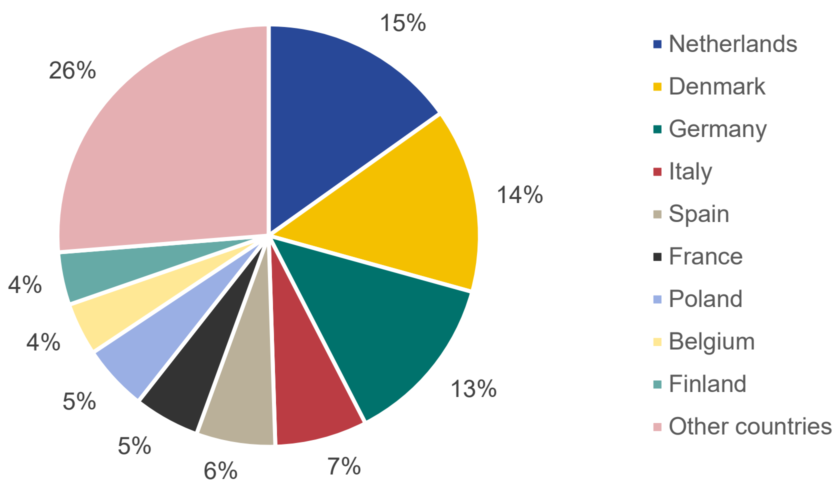
*It is primarily fish from Norway that increases the figures in the trade statistics, which is due to the fact that, after entering the EU, Sweden has become a transit country for Norwegian fish on its way to other EU countries.

[1] Jordbruksverket (Swedish Board of Agriculture). Statistics from Statistics Sweden (SCB) on Sweden's trade in agricultural goods and food 2024.

Leading exporting countries of food products to Sweden

- EU dominance – European Union countries, particularly the Netherlands, Denmark and Germany, dominate Sweden's import landscape, supplying a wide range of products from dairy and meat to processed foods.
- Specialised imports – Norway is a key supplier of fish and seafood, while countries like Italy, France and Spain provide specialty items, such as wine, olive oil and fresh produce.
- Non-EU contributions – The United States, China, Brazil, and Thailand contribute to Sweden's imports with products such as nuts, tea, coffee, rice and various processed foods.

Figure 3. Leading exporting countries of agricultural and food products to Sweden



Source: Swedish Board of Agriculture and Statistics Sweden[2]

Identification of products with potential in the Swedish market

Sweden’s food import market has expanded, driven by categories that align with prevailing consumer preferences for health, sustainability, convenience and value.

Key product categories

Coffee and specialty beverages[3]

Significant growth in coffee imports highlights strong demand in one of the world’s top per-capita consumers.

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2 Jordbruksverket (Swedish Board of Agriculture). [Statistics from Statistics Sweden (SCB) on Sweden's trade in agricultural goods and food 2024](#).

3 NielsenIQ – Market Trend Report 2024.

At the same, the volume of sales of ground coffee, instant coffee and coffee pods is declining in both foodservice and retail. Innovative formats such as ice coffee have been emerging over the past three years.

There is constant growth within functional beverages, such as energy, vitamin and sports drinks. Based on our own experiences and the trends described in the next chapter, we see potential for growth – for products such as low-sugar, flavoured sparkling waters and botanical teas.

Fresh fruit and vegetables
Despite global price pressures, both the value and volume of fresh produce imports have increased. Sweden relies heavily on imports for (tropical) fruits, berries, avocados and fresh herbs.

High-growth niche segments include pre-cut fruit, salad mixes and smoothie-ready packs, as well as seasonal and organic varieties.

Vegetarian segment
While the category for frozen vegetarian products has declined in terms of both volume and sales over the past three years, fresh vegetarian meal components and sausages remain stable.

Cereals, grains and meal components
Imports of pasta, rice, breakfast cereals and seed-based products have grown modestly alongside a resurgence in home cooking.

Rising consumer interest in gluten-free and nutrient-dense grains, as well as ready-to-mix and pre-cooked blends, points to further opportunities.

Consumer purchase drivers[4]

Value-conscious quality
Swedish consumers are spending less, but remain unwilling to sacrifice quality. They are trading down to cheaper brands, while avoiding lower-grade products.

Pragmatic sustainability
Many are adopting greener habits like consuming less, but few are willing to pay more for sustainable goods. Price and practicality still outweigh ecological concerns at the point of purchase.

Convenience and flexibility
People prefer physical stores for frequent essentials, but go online for larger or less routine purchases. Convenience continues to shape how and where they shop.

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[4] BCG. Challenging Economy Forces Swedish Consumers to Spend Wiser | BCG.

Understand the market structure

Swedish consumers spend approximately SEK 616 billion annually on food and non-alcoholic beverages[5], of which about 65 per cent is through food retail (grocery stores and supermarkets) and 35 per cent through foodservice (restaurants, cafés and public catering).

Food retail sales reached around SEK 340 billion in 2024, having grown by an average of 5.8 per cent per year (nominal) over the past five years. With food price inflation at 1.4 per cent in 2024, this translated to real volume growth of 2.6 per cent.[6]

The foodservice sector – including both private restaurants and public catering – recovered strongly from the pandemic. Total foodservice consumption in 2023 was SEK 212.6 billion, up 8.5 per cent from 2022. Of this, private restaurants accounted for SEK 172 billion (an 8.2 per cent increase) and public catering (schools, hospitals, etc.) for SEK 40 billion (a 9.4 per cent increase). For 2024, the foodservice market is projected to amount to approximately SEK 217 billion (SEK 176 billion private sector; SEK 41 billion public sector).

Sweden's foodservice share of total food spending remains below that of markets such as the UK (about 40 per cent) and the US (around 50 per cent).

Key players in the market

In Sweden, approximately two thirds of all food and beverage spending takes place through retail channels, while one third takes place through foodservice.

Major players in the market and their market shares

Retail[7]

Grocery retail is highly concentrated. Overall, the top three chains cover roughly 90 per cent of the market.

Table 3. Market share per retail chain in Sweden

Chain/group	Retail market share
ICA	49.9%
Axfood	21.9%
Coop	17.0%
Lidl	6.4%
City Gross	3.2%
Mathem	0.7%
Matrebellerna	0.9%

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5 ECR Sverige. Sector report Foodservice 2024.

6 Market Screener India. Swedish daily consumer goods trade increased by 4.1 % in 2024.

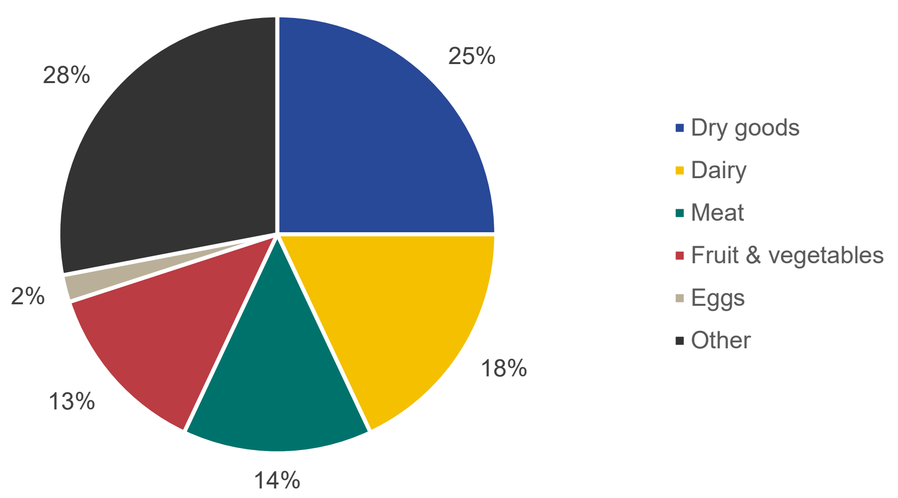
7 ECR Dagligvarukartan 2024.

Sweden has around 3,090 grocery chain outlets. Of these, approximately 40 per cent are small local stores (turnover <MSEK 30). The sector employs roughly 110,000 people, a third aged 16–24 and a quarter with a foreign background. Store formats range from large supermarkets and hypermarkets (e.g. ICA Maxi, Coop Forum) to urban "nära"-stores (ICA Nära, Coop Nära), convenience outlets, and specialty food shops. Apart from food, Systembolaget (the state alcohol retailer) and Apoteket (pharmacy) operate separate networks.

Channels and e-commerce: in 2024, only about 4 per cent of grocery sales took place online. Total e-grocery sales amounted to approx. SEK 14 billion, a small proportion of the total of approx. SEK 343 billion. Online shopping has stabilised following a COVID spike; e-commerce grew by approx. 4.9 per cent in 2024. Nonetheless, Swedes are highly digital – nearly 70 per cent report having shopped online (50 per cent via mobile) – and grocery chains (ICA.se, Coop Online, Hemköp Online, etc.), and online-only services (Mathem.se) are expanding. Payment and ordering apps are common, and many chains offer home delivery or pickup.

Product mix: Swedish shoppers spend most on staples: in 2024, every SEK 100 of grocery sales consisted of around SEK 25 worth of dry goods/pantry items, SEK 18 dairy, SEK 14 meat, and SEK 13 fruit and vegetables.

Figure 4. Spending per SEK 100 grocery sale



Sustainability products: Organic foods account for approx. 3.9 per cent of grocery sales (2024), down slightly from earlier years. Sweden has a high organic cultivation rate, but the consumer share is modest. Nearly half of organic sales carry the national KRAV label (1.9 per cent of food sales).

Foodservice[8]

Market segments: foodservice covers all meals prepared outside the home – restaurants, cafés, fast-food, bars/pubs, hotels, workplace and school canteens, elderly care homes, etc. Private full-service and quick-service restaurants dominate the sector, alongside a sizable public catering segment. Before the pandemic, total foodservice sales amounted to approx. SEK 173 billion (2019); these sales fell to approx. SEK 136 billion in 2020, but then rebounded rapidly. By 2023, foodservice amounted to SEK 212.6 billion. Government-run institutions serve approx. 750 million meals/year (schools, hospitals) with a market value approx. SEK 15 billion.

Table 4. Main foodservice chains in Sweden

Company	Type	Notes
Martin & Servera	Full-service wholesaler	Largest player, two cash and carries
Menigo	Full-service (Axfood)	Focused on large chain customers
Axfood Snabbgross	Cash & carry wholesale	One of the leading restaurant wholesalers
Svensk Cater	Full-service	No private label products
Mårdskog & Lindkvist	Regional wholesaler	Strong in southern Sweden
Chefs Culinar	International wholesaler	Skåne-based, growing in Sweden
Other suppliers	Niche/import/local	Over 1,000 small and specialised firms

Distribution channels: foodservice establishments mainly source via specialised foodservice wholesalers. A handful of "full-service" distributors account for most trade: these include Martin & Servera (cooperative), Menigo (Axfood-owned), Svensk Cater, Axfood Snabbgross, Mårdskog & Lindkvist and Chefs Culinar. There are thousands of niche suppliers, but they serve smaller volumes: the 50 largest of these account for approx. 80 per cent of the segment's sales. Wholesalers handle everything from dry goods and dairy to fresh produce and specialty ingredients, delivering to restaurants, caterers and bars. (Some large chains also import or distribute certain products directly.)

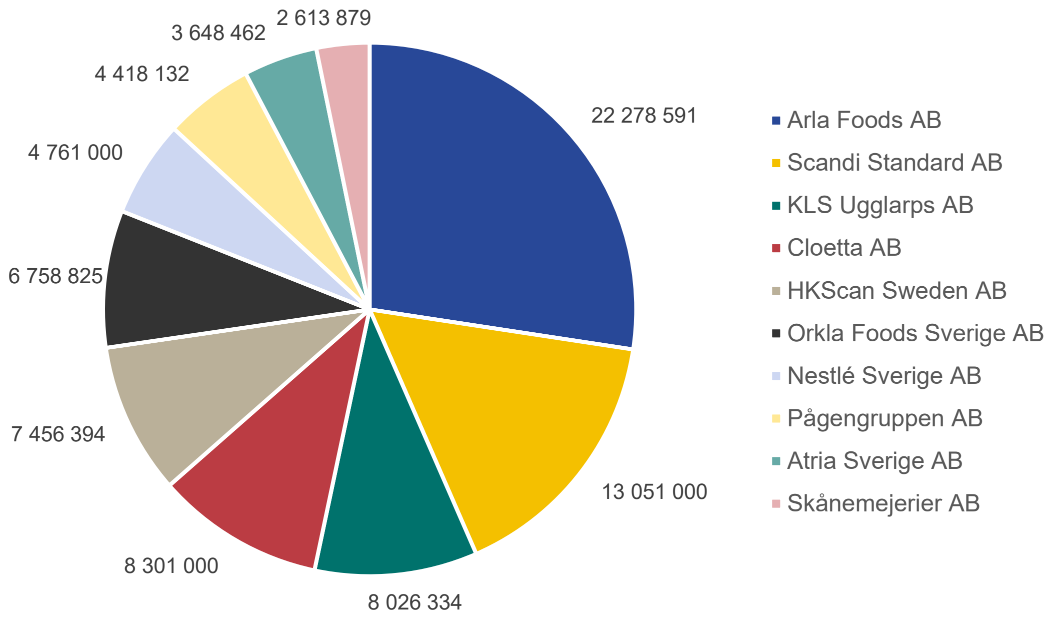
Off-trade (alcohol): retail sales of beer, wine and spirits are controlled by Systembolaget (state-owned liquor stores). Grocery stores sell only non-alcoholic and very low-alcohol drinks (3,5 per cent); restaurants and bars require municipal alcohol licences.

[8] ECR Sverige. Sector report Foodservice 2024.

Leading importers and distributors

Overview of the top ten food and drinks companies in Sweden, ranked by 2023 turnover (latest available full-year fiscal data).

Figure 5. Top ten food and drinks companies in Sweden in tSEK



Source: Allabolag[9]

Main distribution channels[10]

Retail

Finding a local partner is essential for effective distribution. Local partners help to navigate the market, manage logistics and ensure compliance with local regulations. Distribution centres are often located close to urban areas or transport hubs.

Foodservice

More open to a direct relationship with importers compared with retail, with slightly less stringent requirements as regards local partnerships.

Manufacturing/ingredients

This channel is highly price-sensitive, with a strong emphasis on quality assurance. Domestic companies supply raw materials and food ingredients, but imports are also significant because of the short season and availability of Swedish produce.

[9] Allabolag fiscal data

[10] Food Collective’s own experience throughout the years

Keep up with the trends

Market trends

The Swedish food and beverage market is continually evolving in response to changing consumer behaviours, distribution dynamics and competitive pressures.

New trends in processed foods

Drinks: less sugar, less alcohol

Sugar-free sodas rose by 6.5 per cent in 2024 and now make up 56 per cent of all soda sales, while sugary sodas fell by 5.5 per cent. Alcohol-free beer also grew by 6.2 per cent, continuing a long-term upward trend. Overall, the industry grew 1.8 per cent in volume, though profitability remains a challenge due to rising costs. Breweries are responding with more budget-friendly options to meet demand in a tougher economy.[11]

Functional foods (fibres): "good shit" and beyond

Sugar-binding fibre. At the start of 2024, Monch Monch – a plant-based fibre powder – launched in the US. It works by absorbing sugars in the stomach and removing them naturally, positioning fibre not only as a gut-health ingredient, but also as a direct sugar management tool.

Water: The "upgrade water" trend

As water shifts from "free" to a valued resource, new communicative and product strategies have emerged:

- H_2O labelling. Like CO_2 footprints, water footprints will be appearing on packs.
- Hydration sensors. Wearables increasingly track body-water balance alongside heart rate and temperature, signalling a move toward personalised hydration monitoring.
- "Just add water" concentrates. To reduce transport emissions, high-water-content products are shipped as concentrates and require end user reconstitution.
- Shops and bars dedicated to water. As consumers pay premiums, retail space and menus will expand to include exclusive bottled and served waters costing hundreds of kronor.
- Water sommeliers. Expert guides on taste, mouthfeel and "terroir" will emerge, teaching consumers to appreciate water's subtle sensory differences.[12]

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[11] Livsmedelnyheter. Increasing demand for healthier drinks.
[12] Food & Friends. The Pivot Point Trendspotting 2025.

Demand for niche categories such as organic and plant-based products

Private label: from budget to quality choice

Following years of economic pressure, private label products in Sweden have evolved from budget alternatives into trusted quality options.

Strong growth in key categories. According to 2024 data, private label in retail now accounts for over 35 per cent of sales in categories such as chilled and frozen food, dairy, fish and seafood, charcuterie and pantry staples, but remains low in sweets and beverages. [13]

Improved consumer perception. 60 per cent of European consumers say private label products are "as good as or better than" branded alternatives.[14]

Local produce: strong interest, but supply gaps

The Swedish appetite for locally produced food remains strong — but logistics and supply limitations present ongoing challenges.

Growing focus on origin. Demand for Swedish-origin products remains high, particularly in meat, dairy and fresh produce.

Demand outpaces production. Sweden's food self-sufficiency is only around 50per cent, which limits the country's ability to meet rising consumer interest in local foods.[15]

Climate and trust drivers. Local produce is seen as being more sustainable, with fewer transport emissions and greater transparency – attributes that resonate with eco-conscious consumers.

LOHAS and climatarians: from niche to norm

The Lifestyles of Health and Sustainability (LOHAS) consumer segment has become a major influence in Swedish food culture.

The LOHAS movement is growing. According to LOHAS.se, over 30 per cent of Swedes identify with this lifestyle – making food choices based on climate impact, ethics and health (e.g. plant-based, organic and fair trade).

Retailers are responding with climate labeling. Major chains such as Coop and ICA are expanding carbon labelling and product footprint information, appealing to the growing group of "climatarian" consumers.

The urban middle class is leading this trend. The LOHAS segment is particularly strong among women aged 30–50 in urban areas, influencing both grocery ranges and foodservice menus.[16]

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[13] GS1 Sweden & DLF. Private Label in 2024 retail data report.
[14] European Supermarket Magazine. Private Label 'as good as national brands'.
[15] Från Sverige. Record high demand for Swedish labelled food products.
[16] LOHAS Sweden.

Organic: from growth to decline

After years of rapid growth, the organic food market in Sweden is now contracting.

Sales are declining. According to Organic Sweden, organic food sales fell by 1.7 per cent in 2024, reducing market share to 4.3per cent – down from a 2016 peak of 7.2 per cent.[17]

Price pressure is key here. Analysis shows that rising prices and inflation – rather than a lack of interest in sustainability – are the main reasons consumers are stepping away from organic.

Sustainability and innovation in the food industry

Sustainability and innovation have become twin pillars of growth in Sweden's food industry, underpinned by a robust network of public support and active collaboration with private sector leaders.

Several government agencies offer targeted funding and resources to help food tech companies develop and commercialise breakthrough technologies.[18] Vinnova – the national innovation agency – runs a dedicated helpline to support both startups and established firms in food tech research and product development. The Swedish Agency for Economic and Regional Growth (Tillväxtverket) provides growth grants and advisory services aimed at scaling sustainable practices, while the Swedish Board of Agriculture (Jordbruksverket) channels subsidies to agricultural and processing innovations that reduce environmental impact. The Swedish Energy Agency (Energimyndigheten) incentivises projects that boost energy efficiency across the food value chain, from production through packaging.

Beyond state initiatives, wider ecosystem actors play a catalytic role. Public funding schemes often pair financial support with business coaching, production expertise and digitalisation initiatives, helping companies to accelerate from pilot to market. Leading retail groups such as ICA Gruppen also invest in food tech by piloting low-impact logistics, sponsoring circular packaging trials and collaborating with startups to develop more sustainable food systems.[19]

Together, these government-backed programmes and industry partnerships are driving a new generation of food solutions – fostering innovations that can lower carbon footprints, optimise resource use and meet evolving consumer demand for healthier products.

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[17] Organic Sweden. Organic sales in Sweden 2024.
[18] Investportalen. Statliga bidrag för företag 2025.
[19] ICA Gruppen. Drivkraften bakom framtidens livsmedel.

Fulfil the requirements

Legal requirements and standards

EU-based framework: Sweden follows EU food laws on safety, hygiene, labelling and packaging[20]. Most import/export rules are EU-harmonised. However, Sweden enforces some stricter national standards (e.g. concerning pesticides and salmonella control). VAT is 12 per cent on food and restaurant meals (lower than the standard 25 per cent), while tax on alcohol is high (depending on per cent ABV[21]).

Foodservice regulation: restaurants, cafés and caterers must comply with Swedish Food Agency (Livsmedelsverket) rules on hygiene and allergen information. They have a detailed website (in Swedish only)[22] covering everything you need to know as a producer. Staff handling food often need basic hygiene training. Serving alcohol requires a municipal alcohol licence. Public catering (schools, hospitals) must follow nutrition guidelines set by public health authorities.

Certifications and compliance: entering the Swedish market typically requires considerable documentation. Buyers expect full technical dossiers: ingredient lists, nutritional information, safety data sheets and certificates of analysis. Products must have EU-approved food safety certifications (e.g. ISO 22000/FSSC 22000) and quality management (ISO 9001). Organic products should meet EU organic and/or KRAV standards. Sustainability claims must be verifiable (Swedish buyers emphasise “traceability” and environmental impact in the supply chain). The Swedish Food Agency has a complete publication for importers, where exporters can find useful information too.[23]

Government strategy: the Swedish government’s Food Strategy 2.0, launched in April 2025[24], emphasises domestic production, health and environmental sustainability. New EU rules (e.g. the Corporate Sustainability Reporting Directive, effective mid-2024) force large firms to disclose supply chain emissions. Compliance with these evolving regulations (food safety, environmental, labour) is essential for market entry. In summary, success in Sweden requires high quality, transparency and alignment with local consumer and regulatory priorities.

Legal requirements that exporters must meet in order to export to Sweden

Sweden follows EU-wide legislation on food safety, labelling, packaging and hygiene standards. Exporters must comply with EU regulations to access the Swedish market.

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20 European Commission. Labelling and nutrition.
21 Skatteverket (Swedish Tax Agency). Excise duty rates.
22 Livsmedelsverket (Swedish Food Agency). Kontrollwiki.
23 Livsmedelsverket (Swedish Food Agency). Importing pre-packaged foods.
24 Regeringen (Swedish Government). En livsmedelsstrategi för jobb och hållbar tillväxt i hela landet.

EU-level legislation (Harmonised)

General food law (EU Regulation 178/2002[25]): Establishes food safety, traceability and rapid alert systems.

Hygiene packaging[26] (EU Regulations 852/2004, 853/2004, 854/2004): Sets requirements for hygiene practices, HACCP-based controls and official inspections.

Food information to consumers (EU Regulation 1169/2011)27

This Regulation requires clear labelling of allergens, nutritional values and the origin of certain foods. Labels must be legible, truthful and not misleading. While the EU allows food labels to be in any official EU language – including English – Swedish national enforcement practice often requires critical consumer information such as the list of ingredients (ingrediensförteckning) to be provided in Swedish.[28]

This is because ingredient lists are considered to be essential for public health and consumer understanding, especially for people with allergies or dietary restrictions. The Swedish Food Agency (Livsmedelsverket) interprets the Regulation in a way that prioritises the ability of all consumers, regardless of language skills to make safe and informed choices. Therefore, while English labels are technically permitted under EU rules, in practice Swedish is required for key elements such as ingredients and allergens to ensure compliance with national consumer protection standards.

Sweden-specific rules

Pesticide residues: Sweden enforces stricter maximum residue levels (MRLs) for certain crops. Information and a list of analytes is available from the Swedish Food Agency.[29]

Salmonella control: National sampling plans for poultry and eggs under Swedish Food Agency oversight.

Alcohol excise duties and licencing: Beer, wine, and spirits taxed at approx. 25 per cent; retail via Systembolaget, on-premise sales require a municipal licence.

Product safety and traceability

Traceability: full batch tracking from origin to shelf is a legal requirement (EU Regulation 178/2002); many importers pilot digital/blockchain solutions.

Safety Data Sheets (SDS): for additives and processing aids, compliant with CLP (Regulation 1272/2008).[30]

Certificates of Analysis (CoA): recent test results for microbiological, chemical, heavy metals and pesticide residues. To be done by a laboratory.

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25 EUR-Lex. Regulation (EC) No 178/2002.
26 European Commission. Food hygiene.
27 EUR-Lex. Regulation (EU) No 1169/2011.
28 Livsmedelsverket (Swedish Food Agency). Text på förpackning, märkning.
29 Livsmedelsverket (Swedish Food Agency). Pesticide residues – analysis.
30 Publications Office of the EU. Guidance on the compilation of safety data sheets.

Preferred private standards/certifications by Swedish importers

For Swedish importers, traceability is critical. Certification schemes such as ISO 22000, FSSC 22000 and other similar food safety management systems are highly valued and often required by major clients. [31]

Additionally, organic certification (EU Organic[32] or KRAV[33]) is preferred but not mandatory for many buyers, especially for products marketed as eco-friendly. For sustainability-related matters, Fairtrade[34] and the Rainforest Alliance[35] labels are popular for coffee, cocoa and bananas.

Traceability and supplier due diligence

GlobalG.A.P.[36]: ensures farm-level traceability and good agricultural practices.

BRC[37], IFS[38]: retail and foodservice schemes emphasising detailed supply chain documentation.

Upcoming legislation or new standards that could affect future purchasing decisions

A key regulation to watch is the EU Deforestation Regulation (EUDR[39]), which will require companies to trace the origin of certain products such as soy, cocoa, coffee and palm oil to ensure they are not linked to deforestation. This Regulation forms part of the EU's broader sustainability goals, and will have implications for both large and small importers. Additionally, the Corporate Sustainability Reporting Directive (CSRD[40]), effective mid-2024, will require large companies to report their supply chain emissions, further influencing future purchasing behaviour.

In conclusion, success in the Swedish market requires comprehensive documentation, compliance with EU standards, and alignment with evolving sustainability regulations and private certifications.

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31 GS1 Sweden. Traceability.
32 European Commission. The organic logo.
33 KRAV. Eat Better with KRAV – a Label for Sustainable Food.
34 Fairtrade America. Benefits of being certified.
35 Rainforest Alliance. Using Our Logo and Seal.
36 GLOBALG.A.P. Impact areas and claims.
37 BRC compliance. BRC GAP Analysis.
38 IFS (International Featured Standards).
39 European Commission. Regulation on Deforestation-free products.
40 EUR-Lex. Directive (EU) 2022/2464.

Determine your logistics solution

Overview of the logistics chain

The image below shows a summarised version of the logistics chain for exporting products to Sweden. This can differ per product, channel or category.

Figure 6. Visualisation of steps in the supply chain

Preferences regarding transport and logistics

Long distances between production centres – often located in continental Europe – and Swedish distribution hubs drive up per-unit transport costs. Sweden's low population density and extensive land area mean goods must travel further to reach end markets, especially in the sparsely populated north, where travel distances are higher and load factors lower.[41] Winter conditions introduce delays, require specialised vehicles, and raise insurance and maintenance costs, all of which inflate freight rates. High Swedish labour costs and stringent environmental regulations – such as emissions and noise standards – further elevate fleet expenditures. Fuel prices, shaped by national tax policy, are also well above the EU average, making overland transport comparatively expensive.[42] These factors push Swedish importers and distributors to prioritise higher-value, low-weight goods, consolidate shipments, and use multimodal solutions – combining sea, rail and road – to balance cost, speed and sustainability.

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41 Journal of Transport Geography. The role of dry ports in solving seaport disruptions: A Swedish case study.

42 CNR (Comité national routier). The Sweden road freight transport sector – 2021.

Find a business partner

How buyers typically find trade partners in the Swedish market

Buyers in the Swedish market often rely on a combination of trade fairs and existing networks to identify potential trade partners.

Sector-specific trade fairs

In Sweden

Nordic Organic Food Fair (Malmö) – This event focuses on natural and organic products within the Nordic region, although it also attracts many international exhibitors. The fair primarily showcases finished products.

Fastfood, Café and Restaurant Expo (Stockholm) – A key trade fair for Sweden's food service sector, attracting participants from across the Nordic region.

In the rest of Europe

The most important European trade fairs include:

ANUGA (Cologne, Germany) – One of the world's largest trade fairs for food and beverages, ANUGA is a major event for the European food sector.

PLMA's World of Private Label (Amsterdam, Netherlands) – This trade show connects private label manufacturers with major retailers seeking to expand their product lines.

Fi Europe (Frankfurt, Germany) – Trade show essential for meeting buyers of both conventional and organic food ingredients.

SIAL Paris (Paris, France) – As a leading food trade show in Europe, SIAL Paris is worth visiting to meet buyers of FMCG goods.

Biofach (Nuremberg, Germany) – Visiting the world's largest trade show for organic products is essential for suppliers of organic ingredients and products.

Sector- or category-specific trade fairs relevant to processed food suppliers

Vitafoods Europe (Barcelona, Spain) – This event focuses on nutraceuticals, functional foods and dietary supplements.

TuttoFood (Milan, Italy) – A platform for gourmet foods, organic products and innovative food solutions, attracting global buyers and suppliers.

Seafood Expo Global (Barcelona, Spain) This expo is the world's largest trade event for the seafood industry.

Fruit Logistica (Berlin, Germany) – Leading trade show for the fresh produce industry, covering all aspects of the supply chain, including logistics and packaging innovations.

Alimentaria (Barcelona, Spain) – One of the largest international trade fairs for the food and beverage industry, focusing on the latest trends and innovations.

Fruit Attraction (Madrid, Spain) – This event is a major platform for fruit and vegetable operators to establish business relationships and explore new opportunities.

Buyers' preferences

To succeed in Sweden, exporters must understand that buyers rarely expand their range without replacing existing products. This means your product must clearly offer advantages over current alternatives – better quality, pricing, innovation or sustainability.[43] Market and consumer insights, including a comprehensive competitive analysis, are essential to demonstrate why your product will perform better.

Retailers expect market support to drive product visibility, rotation and long-term distribution growth. Although the traditional Efficient Consumer Response (ECR) windows will be phased out by 2026, many grocery retailers will continue to use the existing ECR structure as a guide for at least another year. Therefore, aligning with these timelines remains important when planning your market entry. More information can be found on their page in English.[44]

In many industries, primary producers often commit to long-term agreements with just a single buyer, and rarely switch to other buyers. Additionally, it is normally the buyer who has most control over setting the price that is to be paid for the producer's goods.[45] Swedish buyers favour financially stable, well-established companies, typically with at least five years of operational history and clear export readiness.

> “*When products of Swedish origin are available, they are our preferred choice. In other cases, key decision factors include competitive pricing, high quality, reliable delivery, and a strong focus on climate-friendly or sustainable practices."*
>
> Nicklas Hedin, Sourcing Category Manager F&B at Scandic Hotels

Finally, your product must be relevant to Swedish consumer preferences. Success in your home market does not automatically guarantee success in Sweden. Key considerations include consumer taste, packaging, pricing and a shelf-life that accommodates international logistics.

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43 Experience from meetings with buyers, category managers and negotiations from the past years.
44 ECR Sweden. ECR Trade Windows.
45 Konkurrensverket (Swedish Competition Authority). Summary of the Swedish Competition Authority’s inquiry into the food industry 2023–2024.

Conclusions

Summary of findings

This study presents an updated analysis of the Swedish market for processed foods, focusing on opportunities for exporters from developing countries. Key findings include:

Market overview: The Swedish market for processed foods is characterised by strong demand for health, sustainability, convenience and value. Categories such as coffee, functional beverages, high-quality fresh fruit and vegetables and cereals and grains show significant growth potential.

Consumer trends: Swedish consumers prioritise quality, health and sustainability. The organic market has seen a slight decline due to price pressures. Consumers are becoming more and more price-conscious.

Market structure: The food retail sector is highly concentrated, with ICA, Axfood, and Coop dominating the market. The foodservice sector is recovering strongly from the pandemic, with significant growth within private restaurants and public catering.

Regulatory environment: Exporters must comply with EU and Sweden-specific regulations on food safety, labeling and packaging. Certifications such as ISO 22000, FSSC 22000 and KRAV are highly valued by Swedish importers. Specific requirements or focus on local produce or sustainability may vary between buyers.

Logistics: The logistics chain for exporting to Sweden involves several steps, including packing and export preparation, transportation and distribution within Sweden. Seasonal weather and high labour costs are significant factors influencing logistics prices.

Business partnerships: Building strong relationships with local partners and participating in trade fairs are effective strategies for entering the Swedish market. Buyers prefer financially stable companies with clear export readiness.

To succeed in the Swedish market, exporters must offer products that clearly outperform existing ones in quality, price, innovation or sustainability, as buyers rarely expand ranges without making substitutions. Comprehensive market research and competitive analysis are crucial, along with retailer support to ensure product visibility and sustained distribution. Swedish buyers typically commit to long-term supplier relationships, exert strong price control and prefer financially stable exporters. Products must also align with Swedish consumer preferences, taking into account taste, packaging, pricing, and logistics-compatible shelf-life.

Recommendations for exporters from developing economies based on the study's findings

To successfully introduce food and beverage products into the Swedish market, foreign companies typically need a local partner – such as a distributor, importer or agent – who understands the regulatory landscape, market expectations and buyer networks.

Drawing on both the findings of the reports and the projects that we have guided, successful market launches in the Swedish food sector hinge on disciplined preparation and timing:

- **Comprehensive market research:** start by mapping consumer needs, competitive offerings and regulatory nuances – never rely on assumptions alone.
- **Certifications and compliance:** identify all required certificates up-front (organic, allergy, sustainability labels, etc.), and be ready to provide full traceability and product safety documentation upon request.
- **Dedicated commercial expertise:** engage someone with local retail know-how to validate your pricing, positioning and partner agreements.
- **Realistic timelines:** from initial concept to shelf, expect roughly a nine-month rollout – plan milestones accordingly.
- **Business case clarity:** solidify your margins, volumes and logistics plan before pitching.
- **Launch windows[46]:** retail chains open category-specific windows just two or three times a year – bear in mind that the launch windows will be phased out by the Swedish Competition Authority from 2026 onwards, although buyers will still be able to use them as a planning timeline.
- **Digital-first submissions:** all proposals must be submitted electronically, in Swedish, and be formatted in accordance with each retailer's specifications.

By following these steps, you will minimise unpleasant surprises, strengthen your retailer partnerships and position your product for a smoother, more predictable entry into Sweden's food market.

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46 ECR Sweden. ECR-Trade-Windows-2025-1.pdf