



Strategic Dependencies in Swedish Imports

A methodological framework and analysis

June 2026



Preface

Questions of economic security and strategic dependencies have become increasingly central to trade policy. Geopolitical tensions, disruptions in global supply chains, and the growing use of trade policy measures as instruments of leverage have highlighted the need for better knowledge of the dependencies that may affect Sweden's economy, competitiveness, and resilience.

In this report, the National Board of Trade Sweden develops a quantitative method for identifying strategic dependencies in Swedish imports from third countries. The method is intended to contribute to a more systematic and transparent analytical framework by combining several dimensions of dependency, including strategic importance, diversification opportunities, and exposure to supply-related risks.

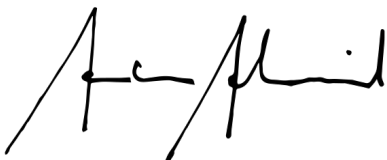
The analysis shows that Sweden's most vulnerable dependencies are largely linked to intermediate inputs used in industry, particularly in areas such as advanced technologies, chemical products, and critical raw materials. The findings therefore underline that strategic dependencies are mainly associated with global value chains and industrial production processes rather than final consumption. The report also shows that dependencies related to China and the United States become especially prominent when the analysis focuses on goods with limited possibilities for global diversification and higher supply-related risks.

The report also aims to contribute to the ongoing methodological discussions within the EU concerning the mapping of strategic dependencies. An important conclusion is that dependency analyses need to be continuous, risk-based, and built on both national assessments and close cooperation between authorities, businesses, and other relevant stakeholders.

It is our hope that this report will contribute to a deeper understanding of Sweden's strategic import dependencies and serve as a knowledge base for continued work on economic security, competitiveness, and resilience.

This report has been written by Ebba Lundqvist and Edvin Johannesson. Valuable comments and contributions have been provided by Kristina Olofsson, Per Altenberg, and Petter Stålenheim.

Stockholm, June 2026



Anders Ahnlid
Director-General
National Board of Trade Sweden

Summary

Mutual dependencies between trading partners are a fundamental feature of international trade. At the same time, rising geopolitical tensions, increasingly complex value chains and recurring supply chain disruptions have highlighted how certain dependencies may create vulnerabilities. This has increased the need for a better understanding of trade dependencies that could have significant societal or economic consequences in the event of disruption.

This report proposes a quantitative method for identifying strategic dependencies and applies it to Sweden's imports from third countries. The method is based on a stepwise, criteria-based screening process in four stages: (1) identifying import dependencies, (2) restricting the analysis to strategic goods, (3) identifying vulnerable dependencies with limited global diversification opportunities, and (4) identifying particularly vulnerable dependencies based on exposure to so-called supply risk countries.

The results show that Sweden has import dependencies in 818 commodity codes, of which 323 are classified as strategic dependencies. Of these, 97 are identified as vulnerable and 47 as particularly vulnerable. The structure of Swedish dependencies changes with the different criteria applied across the four steps of the method, especially in terms of trading partners. A large share of imports from Norway consists of non-strategic goods or goods with broad diversification possibilities, while more vulnerable dependencies are concentrated almost exclusively to China and the United States. A significant share of the identified dependencies consists of intermediate goods for industry, particularly in areas such as advanced technologies, chemical products, and critical raw materials. This suggests that strategic dependencies are primarily linked to production and value chains rather than final consumption.

The report puts forward several recommendations for advancing efforts to map strategic dependencies. Key recommendations concern increased methodological coordination within the EU, improvements in statistics, more coherent national approaches to identifying strategically important sectors and goods, and better tools for capturing indirect dependencies in global value chains. It is important to emphasise that the method identifies dependencies based on available statistics using quantitative criteria. Moreover, what is considered strategic ultimately rests on a normative assessment that is decisive for the results. The findings should therefore be complemented with more in-depth qualitative assessments as a basis for decision-makers. Finally, strategic dependencies evolve over time, which means that the analysis needs to be updated continuously.

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1 Introduction

International trade creates mutual dependencies between countries. Through specialisation and economic exchange, economies become increasingly interconnected, contributing to higher productivity, lower costs and a wider selection of goods and services. Dependencies are therefore a fundamental feature of the global trading system and are not inherently problematic. On the contrary, they have long been regarded as a natural and largely positive consequence of deeper economic integration. At the same time, globalisation and the emergence of more complex global value chains have made dependencies more extensive and harder to map.

In recent years, disruptions to global supply chains and rising geopolitical tensions have highlighted how certain dependencies may create vulnerabilities. This became particularly evident during the COVID-19 pandemic, the energy crisis in Europe following Russia's full-scale invasion of Ukraine, and recurring disruptions to key transport routes due to conflicts in the Middle East. Meanwhile, concentrated global market power is increasingly being used as a geopolitical instrument, for example through export restrictions on rare earth elements or key technologies. Taken together, these developments have increased the focus on which dependencies may have particularly adverse consequences for society and the economy in the event of disruption. This applies especially where access to critical intermediate goods is affected, imports are concentrated among a limited number of suppliers, and the scope to mitigate such consequences is limited.

Against this backdrop, the concept of strategic dependencies has assumed a prominent role in EU trade and industrial policy. It is closely linked to the overarching aim of strengthening resilience and economic security without undermining openness in international trade. At the same time, many dependencies – or trade relations – continue to function well even in a more uncertain global environment. Measures to reduce dependencies therefore need to be targeted and evidence-based, as overly broad approaches risk undermining the benefits of open trade, not least through efficiency costs.

To address potentially problematic trade dependencies in a targeted and proportionate manner, they must first be identified. In its March 2026 conclusions, the European Council emphasised the need to further strengthen this work and called on the European Commission, in cooperation with the Member States, to map dependencies in strategic sectors by the end of 2026. This work is taking place in parallel with other EU initiatives in which measures to address such dependencies form an important component, including in the areas of critical raw materials, semiconductors and economic security.¹

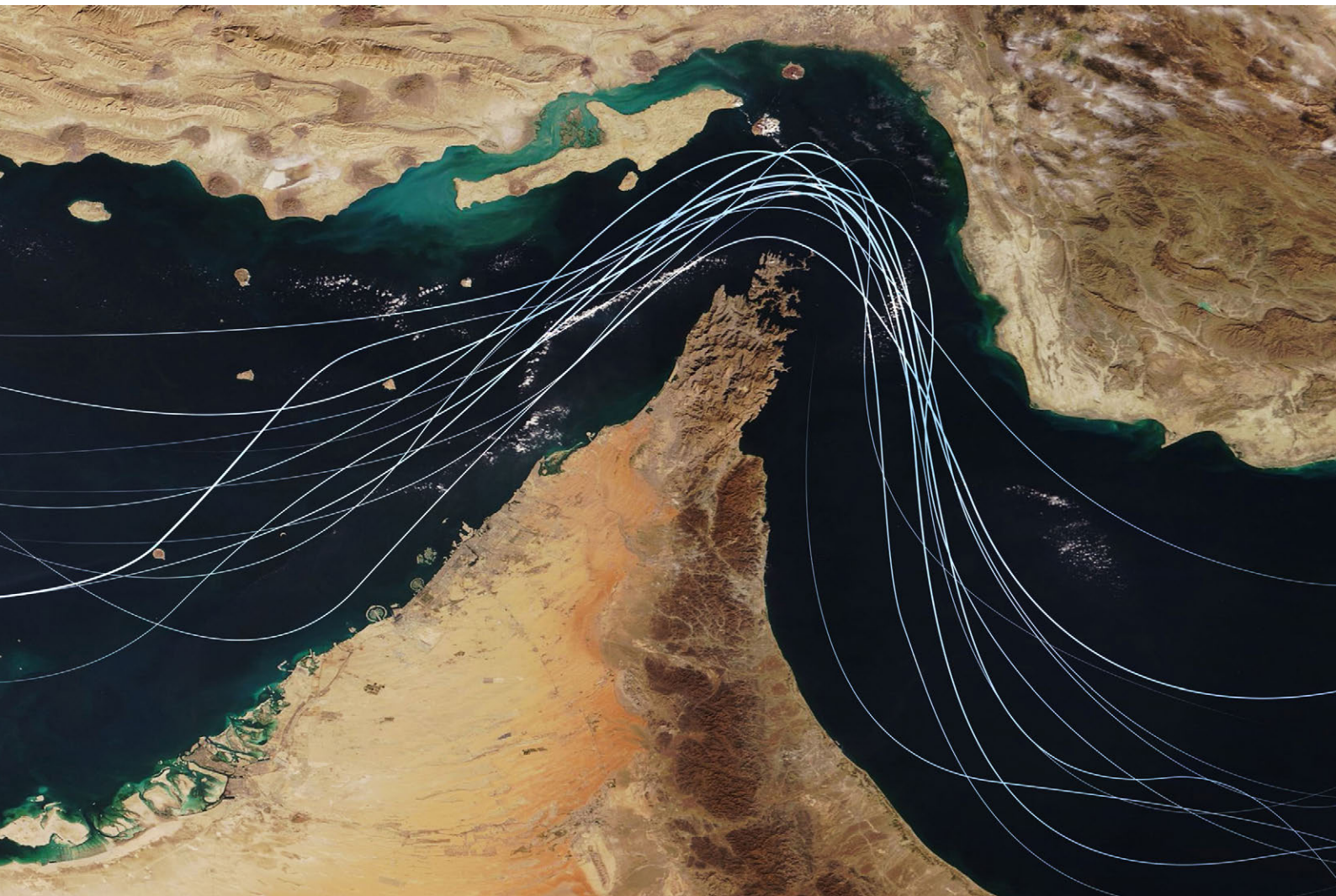
This report takes this broader policy context as its starting point. It focuses on developing a quantitative method for identifying strategic dependencies and applying this method to Swedish extra-EU imports of goods. Based on available statistics, the analysis aims to provide an indicative understanding of which dependencies may entail risks. This paper does not, however, address which policy measures should be taken to manage the identified dependencies.

1. Other examples of such EU-initiatives include the Strategic Technologies for Europe Platform (STEP), as well as proposals for a European Competitiveness Fund (ECF), the Industrial Accelerator Act (IAA), and a European preference in public procurement (Made in Europe).

The report has the following objectives:

- Develop a methodological approach for identifying strategic dependencies
- Apply this method to analyse Sweden's strategic dependencies
- Contribute to the ongoing methodological discussion within the EU and advance national work in this area
- Clarify key concepts and their interrelationships, with the aim of facilitating a common understanding across stakeholders.

The rest of the report is organised as follows. Chapter 2 presents an overview of previous work on developing methods to identify import dependencies, focusing on the European Commission's methodology. Chapter 3 introduces a conceptual framework for analysing dependencies, as well as the definitions and scope of this report. Chapter 4 presents the method, followed by the results in Chapter 5. Finally, Chapter 6 focuses on recommendations for future work, and Chapter 7 concludes.



2 Overview of previous methods to identify import dependencies

This section provides an overview of existing methods for identifying and analysing import dependencies, with particular focus on the European Commission’s methodology for identifying strategic dependencies. It highlights key methodological choices and trade-offs relevant to the framework developed in this report. Section 2.3 summarises the main conclusions from the review.

2.1 The European Commission’s methodology

The European Commission’s methodology for identifying strategic dependencies consists of an original method presented in 2021 and an updated version published in 2023. Both versions are described below.

2.1.1 The original method

The European Commission’s (2021) baseline methodology for identifying the EU’s strategic dependencies was presented in the update of the Union’s 2020 Industrial Strategy. The methodology consists of two main stages.

The first stage identifies import dependencies through a quantitative screening using trade statistics. Three indicators are combined: concentration of EU imports from extra-EU sources,² importance of extra-EU imports in total demand, and substitutability of extra-EU imports with EU production.³

The second stage consists of a qualitative assessment of whether the identified dependencies can be considered strategic.⁴ This assessment focuses on goods considered important for the EU’s strategic interests, including the security, safety, and health of EU citizens, as well as the green and digital transitions. The approach is qualitative and based on sectoral expertise and policy considerations.

2.1.2 The updated method

In 2023, the baseline methodology described above was refined by Arjona et al. (2023).⁵ While retaining the original structure, the revised approach introduces three main changes.

First, it uses alternative trade statistics that better capture the actual origin of imported goods rather than transit countries.⁶ Second, dependencies are analysed over multiple years to distinguish structural dependencies from temporary fluctuations. Third, fixed threshold values are complemented with a ranking-based approach to reduce sensitivity to arbitrary cut-offs.

Taken together, these changes are intended to reduce the risk of misleading results, including both overestimation and underestimation of dependencies.

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2. Extra-EU import concentration is measured through the Herfindahl-Hirschman Index (HHI) (see section 4.1 for more details).
 3. This indicator aims to capture the Union’s ability to replace imports from third countries with EU production. Total export value is used as an indicative proxy for EU production capacity. The European Commission justifies its decision to use export statistics rather than production statistics on the grounds that the latter are incomplete and not sufficiently detailed for the purpose of the analysis.
 4. The Commission’s assessment focused on so-called ‘sensitive eco-systems’, including, for example, defence, health, renewable energy and digital industries.
 5. In late March 2026, the European Commission’s Directorate-General for Trade also published a further development of the Commission’s baseline methodology (see Bonnet et al. 2026).
 6. The database used is called FIGARO and is developed by Eurostat and the European Commission’s research centre JRC by combining trade statistics with input-output tables.

2.1.3 Use of dependency indicators in related EU policy areas

Methods for identifying import dependencies are also used by the EU in a number of related policy areas, often in more sector-specific contexts. Different variants of the Commission's dependency indicators are frequently applied, although their purpose and implementation vary. These indicators are typically combined with additional dimensions related to competitiveness, industrial applications or broader risk assessments.

A prominent example is the EU methodology for identifying critical raw materials (European Commission 2023a), which combines measures of economic importance with indicators of supply risk. The latter include country-specific risk factors, which means that dependencies on certain trading partners are considered riskier than others.

Dependency indicators also play an important role in the EU's work on economic security. The Commission's 2025 Communication on economic security outlines a set of criteria for identifying so-called high-risk dependencies. These build on core criteria such as import concentration and the share of imports sourced from outside the EU, but also include factors such as the systemic importance of a good, its relevance for defence or other strategic sectors and the risk of economic coercion (European Commission 2025).

Other examples include the External Vulnerability Index (EXVI) and SCAN (Supply Chain Alert Notification), a system designed to monitor and identify disruptions in EU supply chains (Arjona et al. 2025).

2.2 Other methods to analyse import dependencies

In addition to the European Commission's methodology, a broad range of alternative or complementary approaches has been developed for analysing import dependencies. Overall, these approaches are based on similar underlying principles, including measures of supplier concentration, the importance of foreign sources for supply, possibilities for substitution, and an assessment of the societal importance of goods.

However, the methods differ in terms of how indicators are constructed, which threshold values are used, how indicators are combined, and which trade relationships are analysed. Several studies also highlight the limitations of relying solely on trade statistics and therefore introduce additional criteria such as production capacity or risks associated with specific trading partners. The overview of these different methods in sections 2.2.1 and 2.2.2 serves as a baseline for the methodological framework presented in Chapter 4.⁷

2.2.1 Dependency indicators based on international trade statistics

Many studies rely on trade statistics and use indicators broadly similar to those applied by the European Commission. Most combine measures of supplier concentration, often based on the Herfindahl-Hirschman Index (HHI), with indicators capturing the importance of imports for total supply.⁸ Among others, Lefebvre and Wibaux (2024), Conte (2022) and Chimits (2024) also include an HHI measure of concentration in global exports to capture potential for supplier diversification.

7. See, for instance, Vicard and Wibaux (2023), Berthou et al. (2024) and Arriola et al. (2024) for additional literature reviews of methods to measure trade dependencies.

8. Studies that have used the HHI measure to analyse import dependencies include National Board of Trade Sweden (2025a) and Nordic Council of Ministers (2026). Further examples of studies include Arriola et al. (2024), Kowalski and Bates (2025), Arriola et al. (2023), and Guinea and Sharma (2022).

Several studies emphasise that dependencies are not static but change over time. Applying the European Commission's (2021) method over a longer time horizon, Vicard and Wibaux (2023) show that a significant share of products identified as dependent in one year are no longer identified as such a few years later. This variation can be explained by changes in trade patterns, supplier structures, and temporary disruptions, and has motivated the use of multi-year approaches to distinguish more persistent dependencies from short-term fluctuations (Arriola et al. 2024, Arjona et al. 2023).

A common feature of trade-based methods is the use of exports as a proxy for domestic production capacity and substitution possibilities, in line with one of the European Commission's dependency indicators. This approach is notably adopted in Nordic Council of Ministers (2026), Vicard and Wibaux (2023), and Baur and Flach (2022). In practice, this implies that a trade deficit is interpreted as an indication for limited production capacity. However, several studies also highlight limitations of this measure, including the fact that exports do not necessarily reflect actual production, and that imported and exported goods are often not directly comparable because of, for example, processing or product differentiation (Méjean and Rousseaux 2024, Arriola et al. 2024, and Aubert et al. 2021).

In terms of fixed thresholds, several studies have highlighted the risks associated with setting them arbitrarily and without a clear empirical basis.⁹

2.2.2 Alternative dependency indicators

Several approaches complement trade-based indicators with additional measures to capture dependencies more comprehensively.

A few studies, such as Méjean and Rousseaux (2024), combine trade statistics with production data to better estimate the importance of imports relative to domestic demand and production capacity. Bonnet et al. (2026) analyse EU foreign dependencies using production statistics and, for cases where such data are missing, a proxy indicator based on EU export data developed by Grasso et al. (forthcoming). Related approaches by Jaravel and Méjean (2021), as well as Aubert et al. (2021), use firm-level data to provide a more granular picture of dependencies and analyse their implications for firms and sectors.

Other approaches analyse dependencies through global value chains, thereby capturing indirect dependencies that are not visible in bilateral trade flows alone. The OECD has published several analyses with this approach (see for example Berthou et al. 2024, Arriola et al. 2024, and Arriola et al. 2023). Other studies that use the OECD's *inter-country-input-output*-tables include Baldwin and Freeman (2022) and Flach et al. (2021). While these methods provide a broader perspective on how economies are interconnected, they are also more methodologically complex and generally less detailed.

Finally, some studies introduce an assessment of risks linked to specific trading partners. The aim is to distinguish between dependencies according to the geopolitical or economic risk profile of trading partners. For example, Méjean and Rousseaux (2024) differentiate between suppliers within and outside NATO and complement this with a geopolitical risk index. Flach et al. (2021) use risk indicators related to economic policy, geopolitical uncertainty, climate and cybersecurity, while Pignatti and Puccioni (2025) incorporate measures of geopolitical and climate-related risk.

9. For example, Kowalski et al. (forthcoming), Arriola et al. (2024) and the European Commission (Arjona et al. 2023) highlight the problems of arbitrarily choosing thresholds to identify dependencies. Bonnet et al. (2026) use a cluster analysis to calibrate thresholds.



2.3 Conclusions from the overview

The overview of approaches in the literature points to several important conclusions.

- 1) **No single indicator fully captures strategic import dependencies.** Different dependency indicators, thresholds, and statistical sources produce different results. Quantitative methods should therefore primarily be understood as screening tools.
- 2) **Most approaches rely on two core dimensions: supplier concentration and import exposure.** Additional indicators are often used to assess substitution possibilities, indirect dependencies or country-specific risks.
- 3) **Strategic importance is ultimately a policy-based judgement.** The definition of which goods are considered ‘strategic’ differs across approaches. This reflects how policy priorities and national interests, rather than purely objective economic criteria, are decisive in determining which dependencies are strategic.
- 4) **Dependencies are dynamic and change over time.** Identified dependencies often vary from year to year. This supports the use of a multi-year perspective to distinguish more structural dependencies from temporary disruptions.
- 5) **Trade statistics alone provide a limited picture of substitution possibilities.** Production statistics can improve the analysis, but also have limitations. These include insufficient data coverage, longer time lags, limited comparability between countries and challenges in linking production and trade statistics at a detailed product level.
- 6) **Threshold values are necessary but inevitably arbitrary.** There is no established and empirically grounded method for determining cut-off values. The choice of threshold affects which goods are identified as import dependencies. For this reason, threshold-based methods are sometimes complemented with alternative approaches based on ranked distributions of dependency indicators or other sensitivity analyses.

In sum, the literature review shows that the various analyses share important common features, but also differ significantly in terms of methodological choices, particularly regarding data, indicators, and selection thresholds. These choices may in turn affect which dependencies are identified and how many. The conclusions above have been taken into account in the method proposed in Chapter 4, to the extent possible given the scope of this report.

3 Conceptual framework, definitions and delimitations

Terms such as strategic dependencies and strategic or critical goods are increasingly used in different policy fora. They appear in the EU's work on economic security as well as in national policy analyses in areas such as foreign trade, industry, total defence, and preparedness. However, these concepts often lack clear definitions and a common analytical context.

An ambition of this section is therefore to contribute to a more coherent view and shared understanding of these terms across policy areas. Accordingly, they are first defined in a broader analytical context in Section 3.1, through a proposed conceptual framework for analysing strategic dependencies, and then in a narrower sense in Section 3.2 for the purposes of the method used in this report. This section also describes how import dependencies can be differentiated and sets out the delimitations of the method.

3.1 A conceptual framework for strategic dependencies

Building on the previous section, Figure 1 presents a conceptual framework for analysing trade dependencies. The figure builds on the framework proposed by Arriola et al. (2024) and aims to describe dependencies from a broader perspective than the method proposed in this report.

The purpose of the framework is to illustrate key aspects central to understanding what constitutes a strategic, or otherwise socially important, trade dependency. It could also be applied in other contexts, for example in sector-specific or broader supply analyses.

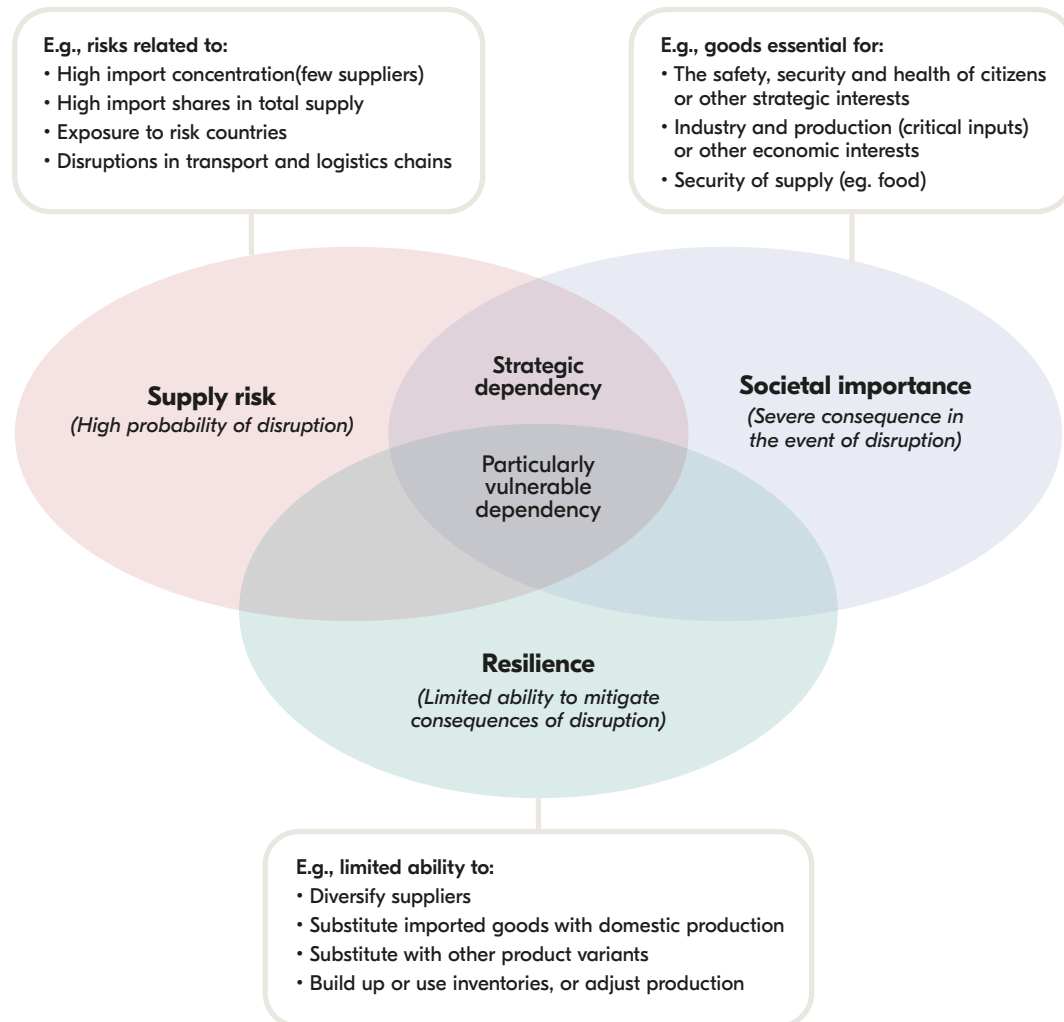
The framework structures the analysis around three dimensions:

- **Supply risk** refers to the probability of disruption in the supply of a good.¹⁰ Such risks may, for instance, be linked to import dependency on a limited number of suppliers, which is the focus of this report, exposure to exporters associated with different types of risk, or disruption in transport and logistics chains. Other types of risk may also be relevant, such as business risks, limited domestic production, climate change, pandemics, or political risks.
- **Societal importance** concerns the severity of the consequences of a disruption. In other words, this dimension describes what is considered strategic, critical, necessary, or important for society or the economy. What counts as societal importance depends on the purpose of the analysis and the perspective applied. Such an assessment may also vary between countries and over time. It is influenced by both economic factors and non-economic considerations, for instance relating to national security, competitiveness, or sustainability (OECD 2025).
- **Resilience** refers to the ability to mitigate the consequences of a disruption, for example by diversifying suppliers, replacing imports with domestic production, substituting with equivalent products, or using different types of stockpiles.

10. Supply risk could also relate to the access to other economic assets than goods – such as services, cross-border data flows, human capital or critical infrastructure and technologies in a broader sense.

Within this framework, a strategic dependency arises when high supply risk coincides with high societal importance. If resilience is also low, that is, if possibilities to mitigate the consequences of import disruptions are limited, the dependency is further reinforced and may be considered particularly vulnerable.

Figure 1. Conceptual framework for analysing dependencies



Source: National Board of Trade Sweden's development of Arriola et al. (2024).

In light of the above, key questions for our methodological development concern which types of supply risks should be considered, which goods or sectors should be regarded as strategic, and which forms of resilience or adjustment capacity should be included. These choices are constrained by factors such as the availability of statistics.

3.2 Definitions used in this report

This section sets out definitions of the key concepts used in this report, developed with reference to the framework presented in the previous section. The central definitional question for the method is what constitutes a strategic dependency. To answer this, we first define import dependency and strategic goods, and then define strategic dependencies. The section also discusses important delimitations.

3.2.1 What is an import dependency?

Import dependencies exist for goods where imports from one or a limited number of suppliers account for a significant share of supply.

This definition differs somewhat from the European Commission's (2021) definition of import dependencies, which places greater emphasis on limited possibilities to replace imports with domestic production. In this report, such aspects are instead treated within the dimension of resilience (see section 3.2.3).

The method focuses on dependencies that reflect longer-term supply patterns, i.e., structural dependencies that persist over time. The analysis therefore does not cover vulnerabilities arising from isolated or temporary disruptions, such as short-term price shocks or temporary interruptions in transport and logistics chains. Nor does it cover supply risks resulting from suppliers being particularly exposed to natural disasters, political instability, or similar factors.

3.2.2 What are strategic goods?

Strategic goods are goods considered to be of central importance to society, for which disruptions in supply have significant negative consequences for strategic or economic interests.

It is important to emphasise that an in-depth assessment of which goods or sectors are strategic lies outside the scope of this report.¹¹ As the European Commission (2021) has noted, such an assessment requires a comprehensive analysis of current and future needs, as well as a shared understanding of what is of greatest importance. In this report, the definition of goods that are of significant societal importance is therefore applied by relying on existing lists of strategic goods and sectors (see section 4.2 for more details).

Arriola et al. (2024) stress that the assessment of what is strategic can be made from both economic and non-economic perspectives. This is also reflected in the societal importance dimension of the conceptual framework (see Figure 1). From a non-economic perspective, strategic goods may be essential for security and defence, public health, the environment, or food supply. From an economic perspective, they may constitute critical intermediate inputs for important industries, where disruptions could have significant consequences for the economy. Meanwhile, views on what is strategic change over time, reflecting shifts in priorities and external circumstances (National Board of Trade Sweden, 2020). Moreover, strategic goods are not necessarily goods on which Sweden is import-dependent.

11. Such an assessment is resource-intensive for several reasons, not least because it requires information from a wide range of experts from various sectors to be gathered, synthesised and translated into commodity codes. Examples of Swedish assessments include the Swedish Agency for Economic and Regional Growth (2025) and Vinnova (2024), which identify key technology areas for economic security and strategic technologies for Sweden, respectively.



3.2.3 Definition and classification of strategic dependencies

Strategic dependencies arise when the supply of strategic goods is largely based on imports from one or a limited number of suppliers.

This definition is broadly in line with the European Commission's (2021) approach.¹² However, there is variation within this definition. The fact that a dependency is strategic does not mean that all such dependencies are equally problematic. Some may be relatively easy to manage in the event of disruption, for example by switching supplier or using alternative products. Others are significantly more difficult to manage because resilience is limited.

There is therefore reason to distinguish between, or grade, different types of strategic dependencies. This approach is inspired by a typology of dependencies developed in the context of discussions within the Council of the EU.¹³ In addition to the two types of dependencies already defined above, import dependencies and strategic dependencies, we define two more vulnerable subcategories of strategic dependencies:

- **Vulnerable dependencies** refer to strategic dependencies where resilience is low, in terms of limited possibilities to diversify imports, that is, to find alternative trading partners, and/or to replace imports with domestic production.¹⁴
- **Particularly vulnerable dependencies** refer to vulnerable dependencies where imports are also concentrated among supply risk countries, which further reinforces the vulnerability. What is meant by supply risk countries in this report is described in section 4.4.

This grading forms the basis for the step-by-step method presented in the next chapter.

12. According to the European Commission's 2021 Industrial Strategy, strategic dependencies arise when they risk affecting or limiting: (1) the safety and security of EU citizens or the EU's ability to pursue a foreign and security policy consistent with its values and strategic interests, (2) the health of EU citizens, or (3) the EU's strategic capacity to act or access inputs, technologies and services that are crucial to the green and digital transitions (National Board of Trade Sweden, 2021)

13. In this typology, dependencies characterised by either limited diversification or limited substitution potential are defined as two separate categories, alongside a third category of vulnerable dependencies where both factors are present. We have chosen to combine these two into a single category of vulnerable dependencies, as both dimensions reflect limited resilience.

14. Examining the possibility to substitute a good with similar product variants is outside the scope of this investigation.

3.2.4 Further delimitations

In addition to the delimitations that follow from applying the broader framework in Figure 1, the scope of the method is further limited as set out below.

This report is limited to identifying trade dependencies in Sweden's imports of goods from third countries, that is, countries that are not members of the EU. First, this implies that we do not examine other forms of trade dependency, such as dependencies related to trade in services, investment, or foreign ownership.¹⁵ Second, the focus is on import dependencies, not export dependencies. Third, the analysis does not take into account so-called interdependencies, i.e., the extent to which other countries depend on Sweden, or whether dependencies overlap (Arriola et al. 2024; Kowalski et al. forthcoming).

Since the analysis is limited to extra-EU imports and does not examine dependencies on other EU Member States, the EU internal market, excluding the EEA countries,¹⁶ is in practice treated as a domestic supplier. This delimitation is justified mainly for three reasons. First, supply risk within the EU is assumed to be sufficiently low.¹⁷ Second, the internal market strengthens Member States' resilience and security of supply. It therefore provides better conditions than would be the case if Sweden were to seek self-sufficiency (National Board of Trade Sweden 2025b). The third reason is data-related: once a good has been imported into the EU, it is difficult to trace its onward movement to other Member States. Goods that Sweden imports from another EU country may have originated in a third country or in another Member State, but this usually cannot be identified directly in the statistics.

Therefore, the analysis uses Swedish import statistics based on country of origin, rather than country of dispatch. This significantly reduces the risk of the so-called Rotterdam effect, where goods that merely pass through other Member States before being re-exported would otherwise be incorrectly attributed to those countries as suppliers.

Finally, the method identifies only direct bilateral trade dependencies, reflecting the detailed import statistics used. Indirect dependencies that may arise further upstream in global or regional value chains are therefore not covered in this report. This means that the analysis does not capture dependencies occurring earlier in the production process before a good is ultimately exported to Sweden. For example, a good may be imported from a third country where production is dependent on intermediate goods, raw materials, or services supplied by other countries. Supply risks in these earlier stages may then affect Swedish access to the good without being visible in the direct trade flows on which this analysis is based. Several methods for analysing these types of indirect dependencies have been developed, including by the OECD, using inter-country input-output tables.¹⁸ However, such statistics are generally less detailed than the statistics used in this report.

15. Other forms of trade-related dependencies may also be significant. For example, FOI (2024) examines dependencies in terms of Chinese ownership of Swedish firms in strategic sectors.

16. Norway, Iceland and Liechtenstein are part of the EU's single market through the Agreement on the European Economic Area (EEA), but are regarded as third countries in this report. This is because they are not part of the EU customs union, which in turn is reflected in import statistics.

17. How well this assumption corresponds to reality depends, among other things, on how one assesses the degree of integration, mutual trust and regulatory harmonisation across the EU internal market – in other words, how much lower the supply risk is within the EU relative to third countries.

18. See, for example, Berthou et al. (2024), Arriola et al. (2024) and Arriola et al. (2023), as well as section 2.2.2.

4 Methodology

In this chapter, we present the proposed methodology for identifying strategic import dependencies. The method is based on the conceptual framework illustrated in Figure 1 and on previous efforts, particularly by the European Commission (2021) and Arjona et al. (2023). At the same time, our method differs from others in how dependency indicators are defined, how production statistics are incorporated, how risks connected to trading partners are considered and how thresholds are determined.

The method is a stepwise screening process in which commodity codes are sequentially excluded based on a set of quantitative criteria. The starting point is all goods imported into Sweden from countries outside the EU between 2021 and 2025. As illustrated in Figure 2 below, the methodology consists of four steps:

- **Step 1** identifies commodity codes for which supply depends on imports from a few third countries. These are Sweden's import dependencies.
- **Step 2** narrows down the commodity codes identified above to those deemed strategic. These commodity codes represent Sweden's strategic dependencies.
- **Step 3** assesses which of the commodity codes identified in step 2 have limited opportunities for global diversification. These constitute Sweden's vulnerable dependencies.
- **Step 4** identifies particularly vulnerable dependencies based on import exposure to so-called supply risk countries.

In a complementary analysis we examine strategic dependencies that may be difficult to replace with EU production. This step and the related results are presented in Appendix B.¹⁹

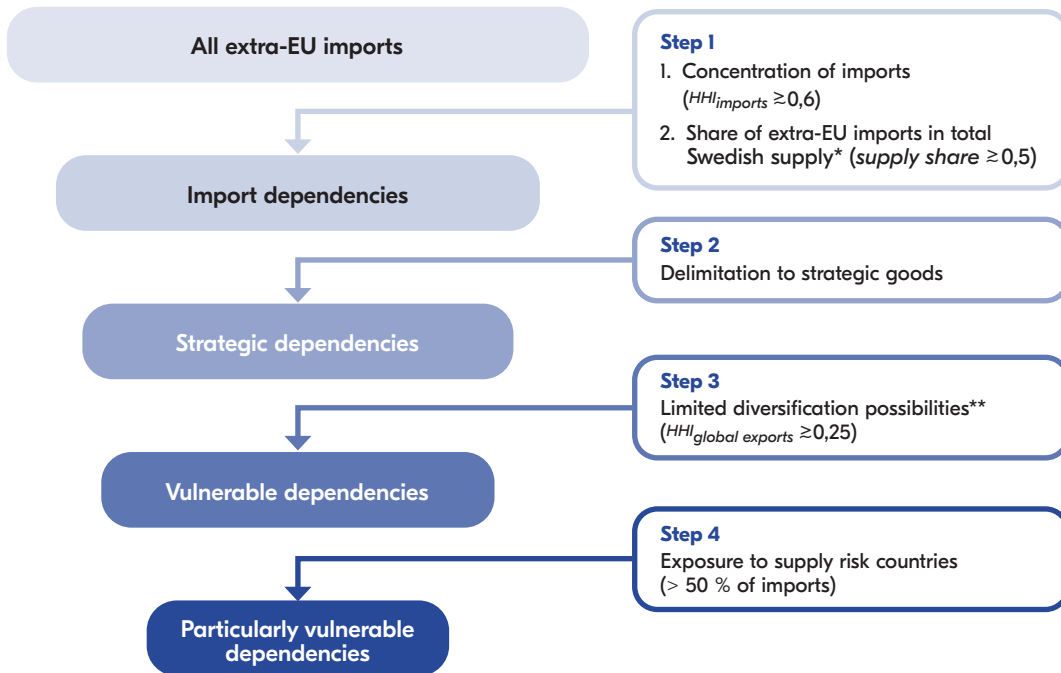
Unless otherwise specified, we identify commodity codes according to the Combined Nomenclature (CN), the EU's common eight-digit commodity code system for classifying goods.²⁰

Statistics for the years 2021-2025 are used for all stages, and all calculations are based on values in SEK, unless otherwise specified.

19. The purpose of the complementary analysis is to refine the identification of goods with limited diversification potential – i.e., vulnerable strategic dependencies – by assessing which strategic dependencies may also be difficult to replace through production from an EU perspective. Due to limitations in the statistics, the results of this step should be interpreted with caution.

20. The first six digits of every CN code are based on the *Harmonised Commodity Description and Coding System*, which is an international convention that has been developed by the World Customs Organisation and is used by almost all countries. For more information, see Appendix A.

Figure 2. A method in four steps to identify Sweden's strategic dependencies



Note: *Total supply is defined as the sum of total imports (i.e., both from the EU Single Market and third countries) and domestic production. **A complementary analysis of possibilities to replace imports with EU production is conducted in Appendix B.

Certain criteria in the method require thresholds to be set in order to identify dependencies. These cut-off values are determined based on the actual statistical distribution of indicators, rather than being set in advance. This means that the thresholds are determined in relation to the actual pattern of Sweden's imports, rather than predetermined levels. This helps reduce arbitrary choices in the method, an issue also raised in the literature (see Chapter 2).

To distinguish more structural dependencies from temporary disturbances, we apply, in accordance with Arjona et al. (2023), a so-called persistence rule. This rule is applied at each stage of the method and means that a commodity must have reached a certain threshold value both in 2025, to give greater weight to more recent trade patterns, and in at least two of the four previous years. However, the persistence rule has limitations, as imports may decline for goods on which third countries have recently imposed export restrictions.²¹ This may result in some strategic dependencies being omitted from the results lists because they do not fully meet the persistence rule. We have therefore conducted a separate analysis of the commodities subject to export restrictions from large export partners, removing the requirement that the thresholds must be met in 2025. These results are presented in section 5.3.1.

21. Information on which countries have imposed export restrictions on certain goods has been retrieved from Global Trade Alert.

4.1 Step 1: Identifying import dependencies

The first step identifies goods for which Sweden is dependent on imports from third countries. To determine goods for which imports from a limited number of suppliers account for a significant share of supply, in line with the definition in section 3.2.1, two criteria are used: (1) supplier concentration and (2) the share of third-country imports in total supply.

The criteria are based on statistics on Swedish imports and Swedish production from Statistics Sweden.²² The statistics are at CN8-level, allowing for a detailed analysis of commodity codes.

The first criterion evaluated in Step 1 is the concentration of Sweden's imports from third countries. Import concentration is measured using the *Herfindahl-Hirschman Index* (HHI), calculated as the sum of the squared market shares of all third-country exporters to Sweden within a specific commodity code:

$$HHI_{v,t} = \sum_{i=1}^N s_{i,v,t}^2$$

where s is the market share for country i out of a total of N countries within a specific commodity code v during year t . HHI can take a value between $1/N$ and 1. A value close to 1 means that imports of the good are highly concentrated among a small number of countries, while a lower value indicates more diversified imports.

The second criterion concerns the share of Sweden's total supply accounted for by extra-EU imports. Total supply is defined as the sum of total imports and domestic production.^{23, 24} The measure is calculated for each year t and commodity code v :

$$\text{Share of supply}_{v,t} = \frac{\text{Imports from third country}_{v,t}}{\text{Total imports}_{v,t} + \text{Domestic production}_{v,t}}$$

If there is no production in Sweden for a certain commodity code in a certain year, this measure simply captures import exposure to third countries. Similarly, if all imports of a certain commodity code originate from an EU Member State, the share of third-country imports in total supply will be equal to zero. Total imports include imports from EU Member States and are based on country of dispatch.

Threshold values for both criteria are based on the distribution of the data and are set at the 75th percentile. In the statistics analysed here, this means that the threshold for HHI is 0.6 and that the threshold for the share of imports in total supply is slightly above 0.5.

Based on these thresholds, the two criteria for import dependency can be visualised by dividing the imported commodity codes into four quadrants according to Figure 3

22. See Appendix A for more information on statistics and how revisions to the combined nomenclature have been handled.

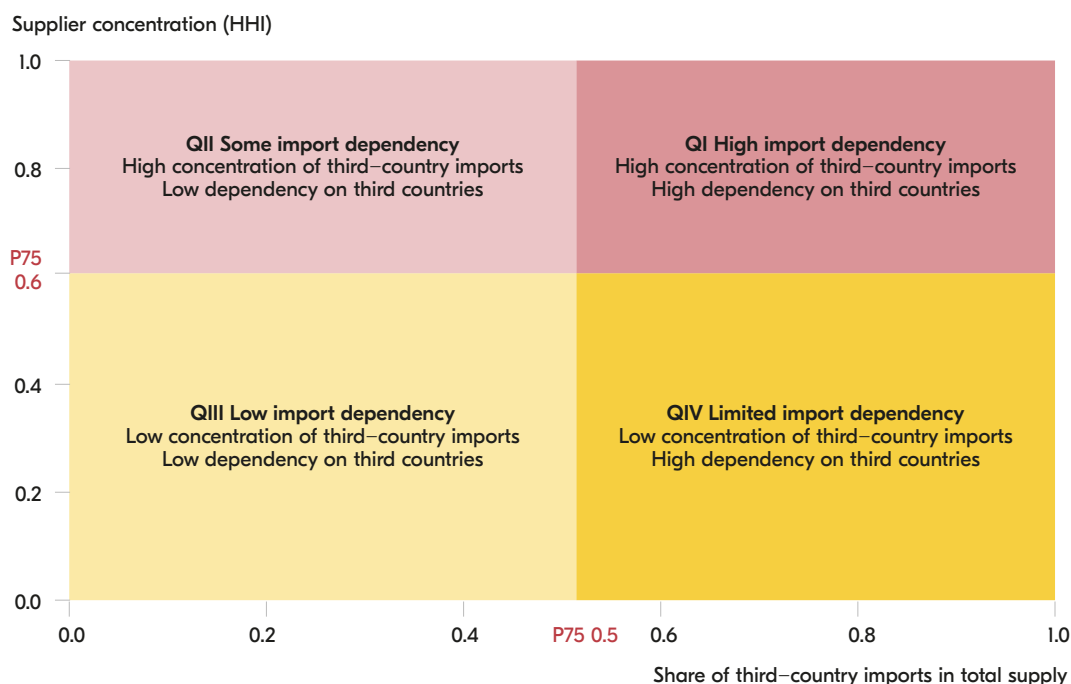
23. Note that this definition of total supply differs from measures that focus on use; for example, national accounts tend to be based on net imports rather than total imports. Exports are not taken into account here, as the measure is intended to capture the stock of a good in the Swedish economy at a given point in time rather than net flows.

24. In relation to the European Commission's (2021) methodology in section 2.1.1, this measure can be interpreted as a combination of the second and third dependency indicators. For example, our measure corresponds to the European Commission's second indicator if the good is not produced in Sweden. However, there are two important differences: firstly, we use production statistics rather than approximate export statistics; and secondly, the measure is not a 'pure' indicator of the potential to replace imports with domestic production. The latter is a further reason behind the complementary analysis presented in Appendix B.

below. Goods are assigned to different quadrants according to their values on the two import dependency indicators.

Only commodity codes in the upper right quadrant, which exceed the thresholds for both criteria, are considered import-dependent in the method and are analysed further in Step 2. All other commodity codes are excluded.

Figure 3. Illustration of import dependencies based on two criteria



Source: National Board of Trade Sweden drawing on Guinea and Sharma (2022). Note: Thresholds for the criteria are marked in red on both axes, where P75 marks out the 75th percentile of each criterion's distribution.

4.2 Step 2: Identifying strategic dependencies

In Step 2, the list of import-dependent commodity codes is narrowed down to those considered strategic, that is, commodity codes of central importance to society where supply disruptions would have significant negative consequences for strategic or economic interests. As noted in Section 3.2.2, a more in-depth assessment of which goods are considered strategic, particularly from a Swedish perspective, lies beyond the scope of this report.

Instead, we rely on existing lists of commodity codes considered strategically important at the EU level. These generally build on assessments made by the European Commission (2021; 2022). They include, among other things, active pharmaceutical ingredients (APIs), advanced technologies, critical raw materials and processed materials, semiconductor-related materials, and goods of military strategic value, including dual-use items. The analysis also includes a broader list of strategic goods developed by CEPII, covering chemicals, pharmaceutical products, steel, electronic products, defence, transport, and energy.

All sources and further information on the lists are provided in Appendix A. The combined list cannot be considered exhaustive, but is deemed to provide sufficiently



broad coverage for the purposes of this report.²⁵ It is again important to clarify that the outcome of the method depends on the assessment of which goods are considered strategic. A different assessment of what is strategic would produce different results.

The commodity codes for which Sweden is import-dependent according to Step 1 and which are also classified as strategic goods in Step 2 proceed to the next step. Other commodity codes are excluded from the subsequent analysis.

4.3 Step 3: Identifying vulnerable dependencies

The third step of the method examines the possibilities for diversifying imports, or expanding the number of import sources, in order to identify strategic dependencies that may be considered vulnerable. This step is included because Sweden's imports may be concentrated even when there is scope for increased diversification in terms of the number of exporters and market shares in the global market. Greater diversification opportunities would reduce the vulnerability associated with strategic dependencies.

Diversification possibilities are assessed based on the degree of export concentration in the global market, again using the Herfindahl-Hirschman Index. In this step, the criterion is calculated at the six-digit level of the Harmonised System (HS).²⁶ Since this step relies on statistics on global exports, it is not possible to retain the level of detail provided by the eight-digit Combined Nomenclature.²⁷ Statistics on global exports are retrieved from Trade Data Monitor (for more information, see Appendix A).

25. The analysis is based on HS2022 and CN2025, which means that lists of commodity codes from previous revisions have been updated. For the lists defining strategic goods at HS6 level, we assume that all CN8 codes falling within an HS6 code are strategic. In some cases, we have manually excluded goods that we have assessed as lacking obvious strategic relevance, specifically certain plastic goods, rubber goods, wood products, glassware, textiles and ceramic products.

26. See footnote 20 and Appendix A for more information.

27. This means that we assume the information available at HS6 level also applies to the CN8 codes covered by the same HS6 code. This may have consequences, as it is not certain that all CN codes within an HS code are exported; in reality, it may be the case that only one or a few CN codes are exported within the same HS code.

As in previous steps, the threshold for this criterion is set at the 75th percentile of the distribution across commodity codes. This corresponds to a threshold value of slightly above 0.25. As noted above, this step is complemented in Appendix B by an analysis of the possibilities for replacing imports with European production. The purpose of this complementary step is to illustrate how the method could be developed in the future if higher-quality production statistics with better coverage become available.²⁸

Goods with high export concentration in the global market are assessed as having limited diversification possibilities. These are classified as vulnerable dependencies and are analysed further in Step 4.

4.4 Step 4: Identifying particularly vulnerable dependencies

In the final step of the method, particularly vulnerable dependencies are identified by analysing from which third countries Sweden imports strategic goods with limited diversification possibilities. As noted earlier, a vulnerable dependency may be considered particularly vulnerable if imports originate from countries associated with some form of risk. In this report, the risk dimension is primarily analysed from a trade policy perspective.²⁹

A supply risk country is defined in this report as a trading partner that has imposed restrictive trade policy measures to limit access to goods and/or is subject to EU sanctions. This is in line with how high-risk dependencies are described in the European Commission's (2025) communication on economic security, where the use of export restrictions by a third country is listed as an indicator.

Supply risk countries are identified primarily using information from Global Trade Alert on countries that have introduced harmful export restrictions against the EU or one of its Member States since 2016. This list is then supplemented with countries subject to EU sanctions. Countries with which the EU has a free trade agreement or ongoing negotiations are excluded, as are EU candidate countries.

The list is based on observed trade policy measures and sanctions decisions. It contains 31 countries in total, including some of Sweden's biggest trading partners, such as China and the United States. In a context where trade policy is increasingly used to pursue national security and geopolitical objectives, it is important to analyse dependencies broadly and on the basis of risk assumptions grounded in observed conditions. Further details on how supply risk countries are identified are provided in Appendix A.

If more than half of the imports of commodity codes identified in the previous steps as vulnerable dependencies originate from one or more supply risk countries, the dependency is assessed as particularly vulnerable.

28. Grasso et al. (forthcoming) have developed an algorithm aimed at overcoming these inconsistencies. The algorithm allocates production data to CN codes based on the distribution of total EU exports for cases where the CN classification provides a more detailed breakdown of specific product categories than the Prodcom classification.

29. It can be argued that the degree of supply-related risk associated with the use of restrictive trade policy measures – as defined in the methodology – also correlates with other dimensions of risk linked to specific trading partners. Furthermore, trade relations, and in particular institutionalised ones in the form of, for example, free trade agreements, are often used as indicators of the degree of trust or cooperation between countries (see, for example, Mansfield et al. 2002; Whitten et al. 2020; Gowa and Mansfield 1993).

5 Results

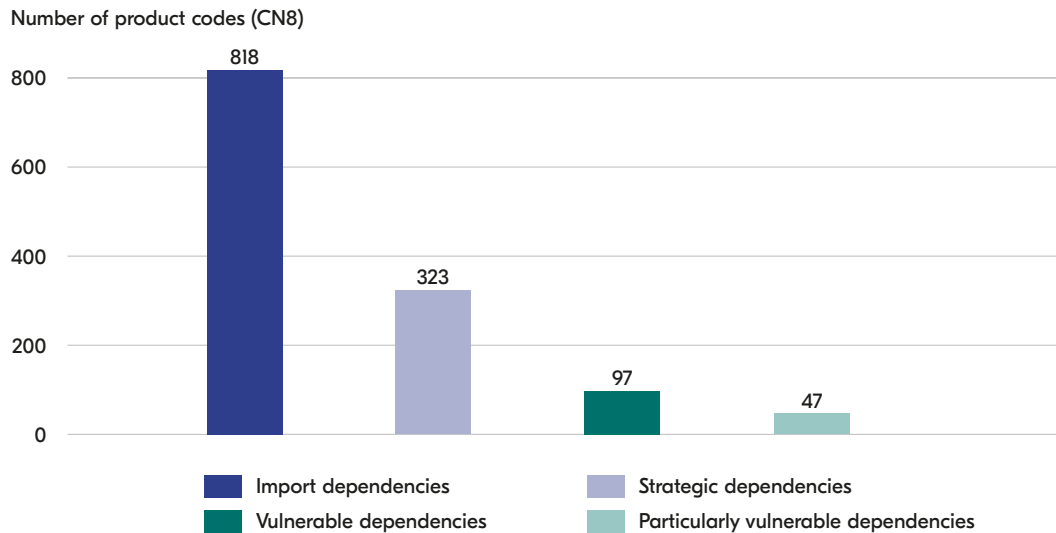
This section presents the results of the method developed in Section 4. The results are presented step by step to illustrate how dependencies and their import sources change as additional criteria are applied. It should be noted that the results concern only dependencies in Sweden's imports from countries outside the EU, which account for slightly more than 35 per cent of Sweden's total imports. Dependencies on EU Member States are also likely to exist, but fall outside the scope of this report.

Section 5.5 complements the results with an industry-level analysis to provide a deeper understanding of how the identified strategic dependencies are distributed across sectors and regions in Sweden.

For each step of the method, the list of goods becomes shorter. Figure 4 illustrates how many commodity codes exceed the thresholds and meet the persistence rule in each step. The commodity codes identified in the first step correspond to slightly less than 10 per cent of the total number of commodity codes imported from third countries during 2021–2025, which amounted to just over 9,200.

According to Step 1 of the method, Sweden has import dependencies in 818 commodity codes. Of these, 323 constitute strategic dependencies according to Step 2. Of these commodity codes, 97 are assessed as having limited diversification opportunities and are also classified as vulnerable dependencies. Among these, 47 are also dependent on imports from supply risk countries. It is for these 47 commodity codes that Sweden's dependencies on third countries are assessed as particularly vulnerable.

Figure 4. Number of commodity codes (CN8) in each step of the method



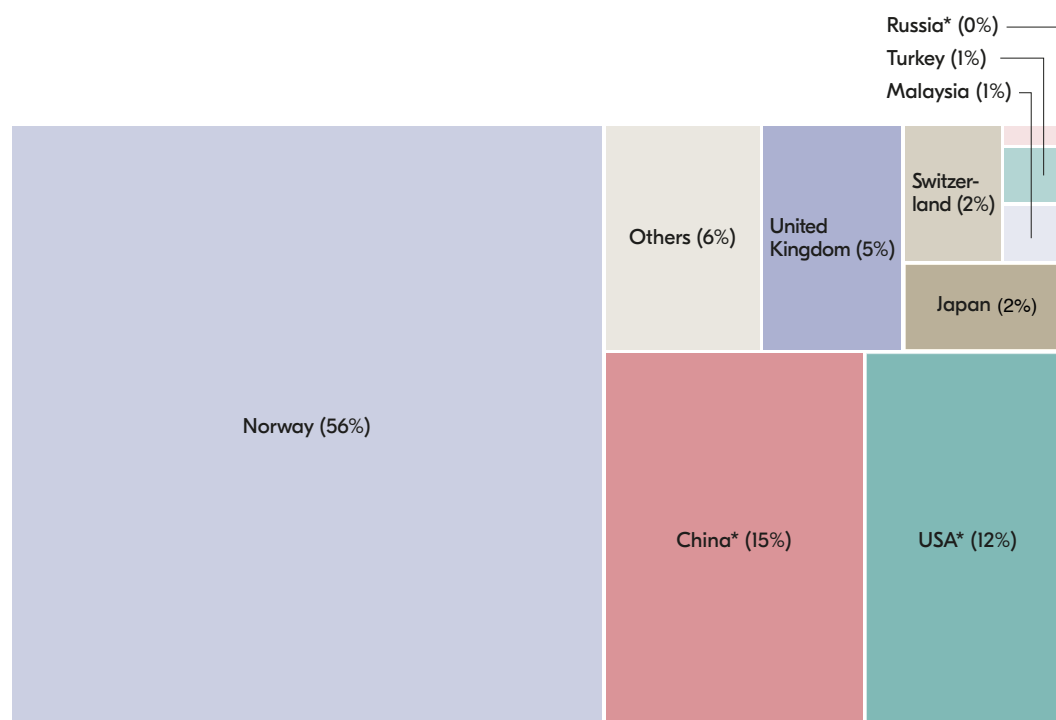
Note: Based on Sweden's imports from third countries based on country of origin 2021–2025.

5.1 Results step 1: Import dependencies

This section presents the results from the first step of the method, that is, Sweden's import dependencies on third countries. This step captures goods where imports from third countries are limited to a small number of countries and where third-country imports account for a large share of Sweden's total supply.

Sweden's import dependencies on third countries correspond to more than seven per cent of total import value, averaged across the years analysed. Figure 5 illustrates the countries of origin of Sweden's dependencies, measured by value. A first observation is that the largest countries of origin are also Sweden's largest trading partners. Norway is the largest exporter to Sweden outside the EU and accounts for 56 per cent of the value of Sweden's import dependencies on third countries. China follows with 15 per cent and the United States with 12 per cent of Sweden's import dependencies. It is natural that Sweden's largest trading partners are also the countries on which Sweden is most import-dependent.

Figure 5. Sweden's import dependencies based on country of origin (share of import value)



Note: Based on Sweden's imports from third countries based on country of origin 2021–2025. Corresponds to commodity codes on which Sweden is import-dependent (Step 1 of the method). * Marks supply risk countries.

5.2 Results step 2: Strategic dependencies

This section presents information on Sweden's strategic dependencies, that is, strategic goods for which Sweden is dependent on imports from third countries. This step includes 323 unique commodity codes at CN8 level, corresponding to approximately three per cent of the value of Sweden's total imports. A large share of these goods, 85 per cent, are used as intermediate goods consumed in production processes.³⁰ Examples of commodity

30. The scope of application of commodity codes has been retrieved from UNSD's Broad Economic Categories (BEC).

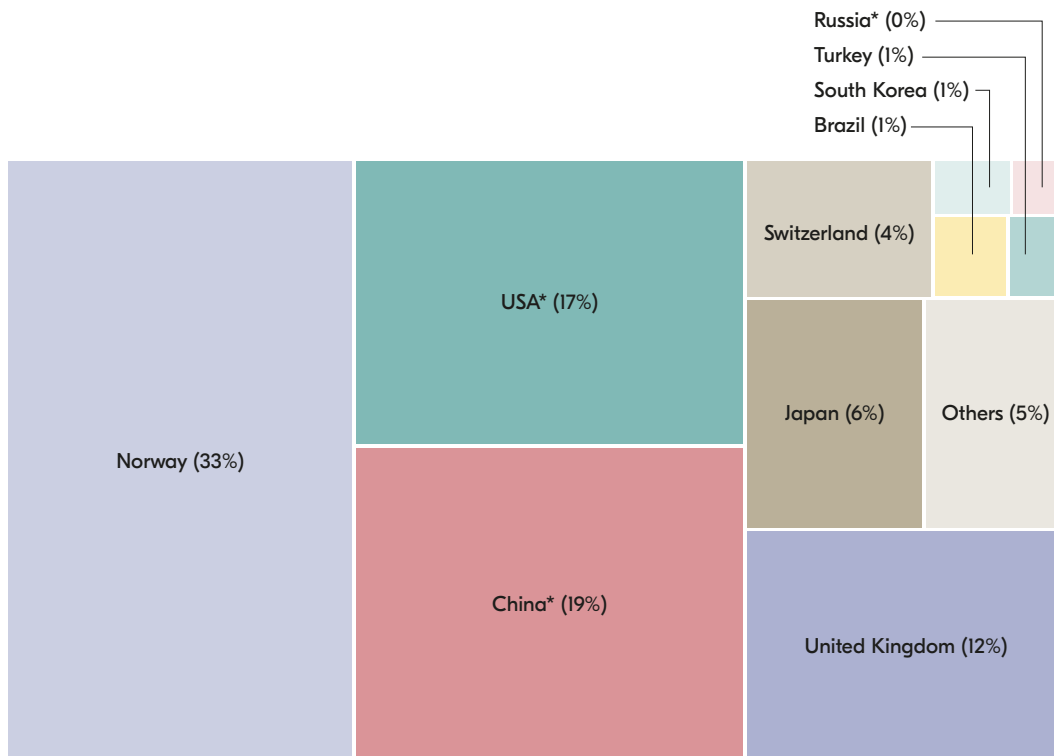
codes with large import values include lithium-ion batteries (CN 8507 60 00), aluminium and articles of aluminium (HS Chapter 76), turbojet engines (HS 8411 11), and iron and steel (HS Chapter 72). In many cases, Sweden depends on Norway for imports of these goods. For lithium-ion batteries and turbojet engines, however, Sweden depends on China and on the United States and Canada, respectively.

A smaller share, 10 per cent, of the strategic dependencies consists of capital goods. These are goods with a longer lifespan that are not immediately consumed when used. An example of capital goods on which Sweden has strategic dependencies is railway or tramway passenger coaches (CN 8605 00 00). Finally, 5 per cent of Sweden’s strategic dependencies consist of consumer goods, meaning finished products that are consumed. A large share of these consists of electrical energy (CN 2716 00 00), for which Norway is the largest exporter to Sweden.

A major difference between the results in Step 1 and Step 2 is that Sweden’s dependency on Norway is almost halved (see Figure 6 below), although Norway remains the largest source of Sweden’s strategic dependencies at 33 per cent. By contrast, dependency on other third countries increase, especially China, the United States and the United Kingdom, where import dependencies rise to 19, 17 and 12 per cent respectively. This indicates that Sweden imports strategic goods to a lesser extent from Norway and to a greater extent from countries such as China, the United States, and the United Kingdom. However, import dependency remains concentrated among a small number of major trading partners.

A more detailed industry-level analysis of the identified strategic dependencies is provided in Section 5.5.

Figure 6. Sweden’s strategic dependencies based on country of origin (share of import value)



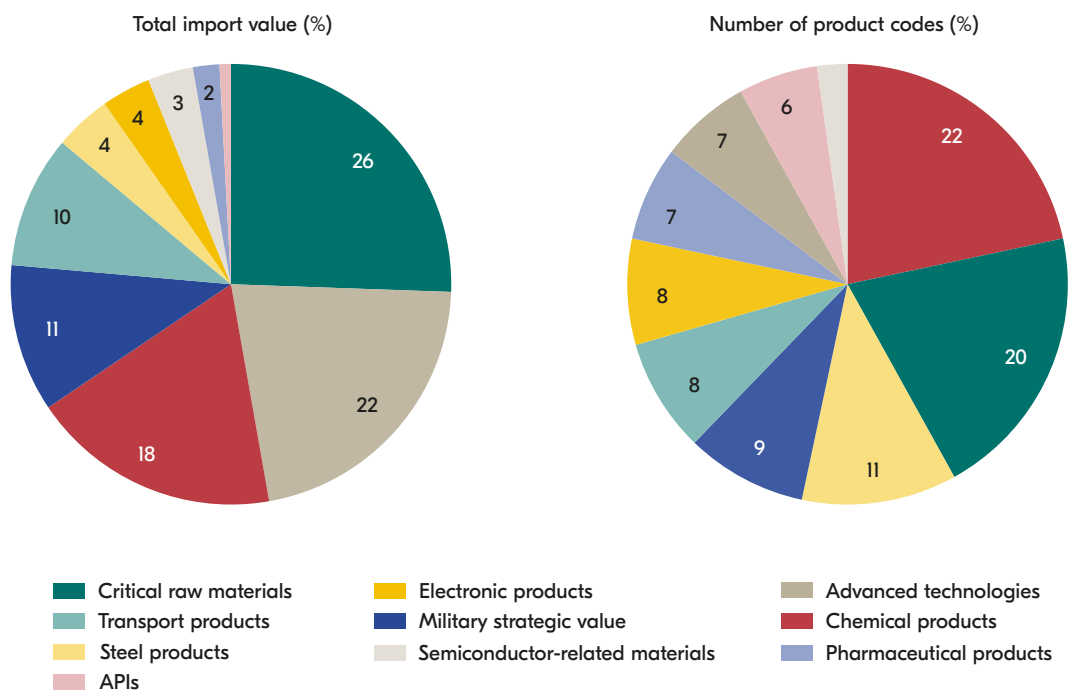
Note: Based on Sweden’s imports from third countries based on country of origin 2021–2025. Corresponds to strategic commodity codes on which Sweden is import-dependent (Step 2 of the method). * Marks supply risk countries.

Below, Figure 7 shows the distribution of different types of strategic goods in Sweden’s strategic dependencies, both in terms of import value and number of commodity codes. The difference between the two pie charts in Figure 7 is important for two reasons. First, total import value is important, since the number of commodity codes may be low while the goods themselves account for a significant share of imports. Second, the number of commodity codes is important, since some goods may not be significant in terms of import value but may still be essential components in production processes. It is therefore useful to identify which types of goods are significant in both respects, and perhaps even more important to identify goods that are significant only in terms of either import value or number of commodity codes.

In value terms, critical raw materials, advanced technologies, and chemical products are the largest categories. Together, they account for just over 60 per cent of Sweden’s third-country imports of strategic goods. Goods of military strategic value and transport products are also among the categories of strategic goods with the largest import values.

In terms of number of commodity codes (right chart in Figure 7), chemical products, critical raw materials, and steel products occur most frequently. Chemical products and steel products are examples of categories that account for a larger share of commodity codes than of total import value. For advanced technologies, the opposite is true: a small number of commodity codes are imported at relatively high value.

Figure 7. Distribution of strategic goods in Sweden’s strategic dependencies on third countries



Note: Based on Sweden’s imports from third countries based on country of origin 2021–2025.

5.3 Results step 3: Vulnerable dependencies

This section presents further information on Sweden’s vulnerable dependencies, that is, strategic goods for which Sweden is import-dependent and where there are limited global diversification possibilities.

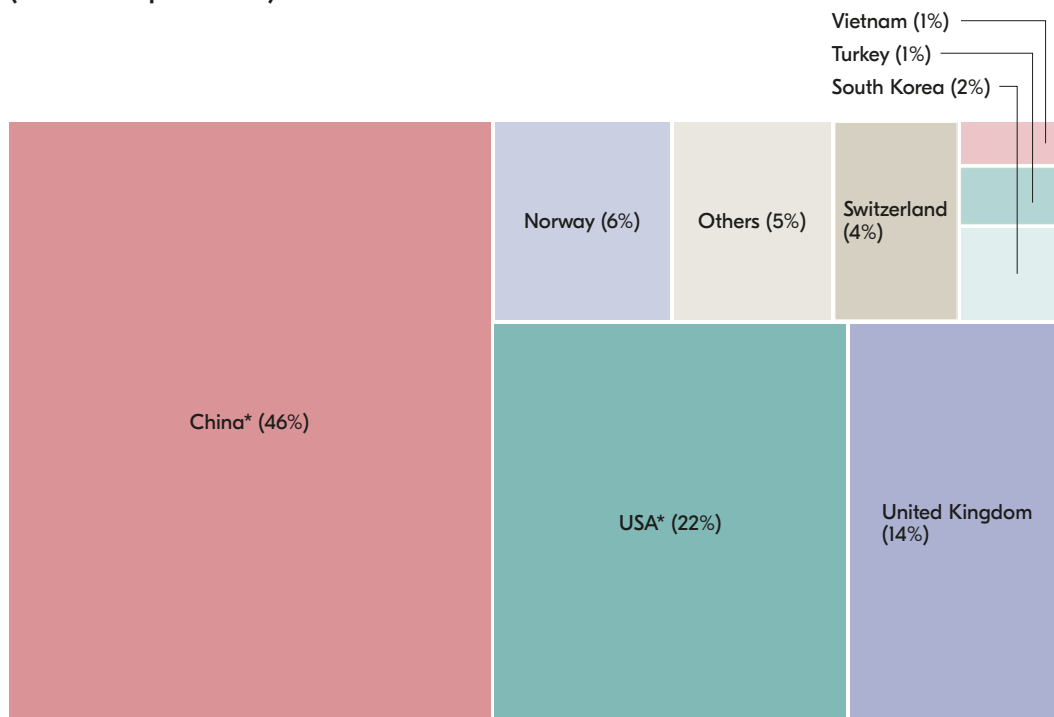
The vulnerable dependencies consist of 97 goods, corresponding to almost one per cent of the value of Sweden’s total imports. A clear majority of these, 82 per cent, are intermediate goods used as inputs in production. In terms of import value, a large share of imports continues to consist of lithium-ion batteries. Several manufacturing industries import this good.

The remaining goods consist of 11 per cent capital goods, i.e. durable assets not consumed when used in production processes, and 7 per cent final consumer goods. Among the capital goods are, for example, locomotives (CN 8601 10 00) and railway or tramway goods vans and wagons (CN 8606 91 80).

Figure 8 illustrates Sweden’s vulnerable dependencies by country of origin. 46 per cent of import value consists of strategic goods imported from China, and 22 per cent of the goods are imported from the United States. Other major import sources for Sweden’s vulnerable strategic dependencies include the United Kingdom, Norway, Switzerland, South Korea, Turkey, and Vietnam.

It is worth noting how Norway’s significance in Sweden’s import dependencies continues to decline at each step. According to Steps 1 and 2 (Figures 5 and 6), Norway is the non-EU country on which Sweden has the largest import dependency. However, this dependency appears not to be strategically significant in many cases, and most goods have good global diversification opportunities, as Norway’s share declines to six per cent in this step. At the same time, dependency on China increases from 15 per cent in Step 1 to 46 per cent in Step 3.

Figure 8. Sweden’s vulnerable dependencies based on country of origin (share of import value)



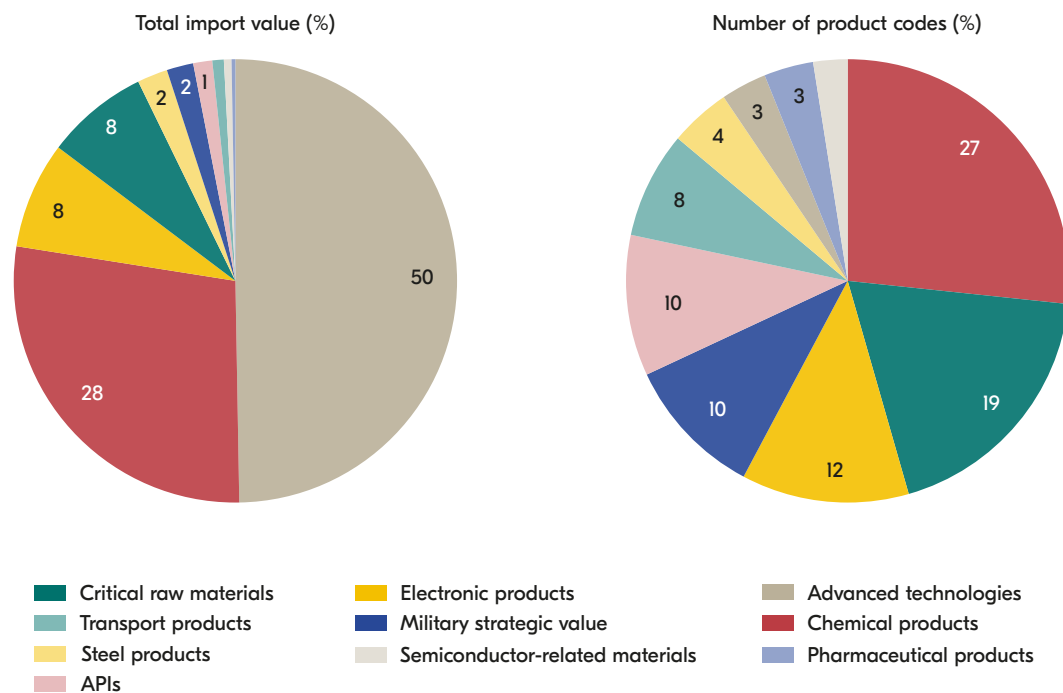
Note: Based on Sweden’s imports from third countries based on country of origin 2021–2025. Corresponds to strategic commodity codes on which Sweden is import-dependent and where there are limited diversification opportunities (Step 3 of the method).

* Marks supply risk countries.

Figure 9, which shows the distribution of strategic goods in Sweden’s vulnerable dependencies, clearly indicates that advanced technologies account for half of total import value. The contrast with the number of commodity codes is substantial, as only four per cent of strategic goods are advanced technologies. This means that the vulnerable dependency on advanced technologies consists of a small number of types of goods imported at high value.

Other categories with large import values include chemical products, critical raw materials, and electronic products. These goods occur more frequently in terms of number of commodity codes. For example, chemical products account for 28 per cent of the total import value of strategic goods and 27 per cent of the number of strategic commodity codes. The number of commodity codes relating to goods of military strategic value and APIs has increased compared with the previous step, although their importance in value terms is lower. This does not, however, mean that these vulnerable dependencies are less significant.

Figure 9. Distribution of strategic goods in Sweden’s vulnerable dependencies on third countries



Note: Based on Sweden’s imports from third countries based on country of origin 2021–2025.

5.3.1 Vulnerable dependencies affected by export restrictions

At each step of the method, we have applied a so-called persistence rule. This rule means that a good must meet the threshold values for each methodological step in 2025 and in at least two of the four preceding years.

However, this entails certain limitations. Third countries may have introduced export-restrictive measures affecting certain commodity codes, which in some cases may have led to reduced imports to Sweden. In such cases, some vulnerable dependencies may fall out of the result lists because they no longer fully meet the persistence rule.

To capture these commodity codes, a separate analysis has been carried out using information from Global Trade Alert on commodity codes subject to export-restrictive measures. For these, the requirement that thresholds must be met in 2025 is removed.



We then add a requirement that the country implementing an export-restrictive measure on a certain commodity code must also be the biggest exporter to Sweden of that commodity code.

This results in a list of commodity codes with vulnerable dependencies, corresponding to Step 3 of the method, that are likely to persist over time despite reduced imports. One example here is lithium oxide and lithium hydroxide, for which China introduced export licences in mid-2025. Sweden's imports of lithium oxide and lithium hydroxide from China have been significant in previous years, but declined markedly following the introduction of new export controls.

5.4 Results step 4: Particularly vulnerable dependencies

This section presents further information on Sweden's particularly vulnerable dependencies, that is, strategic goods with limited global diversification opportunities where a large share of Swedish imports comes from one or more supply risk countries.

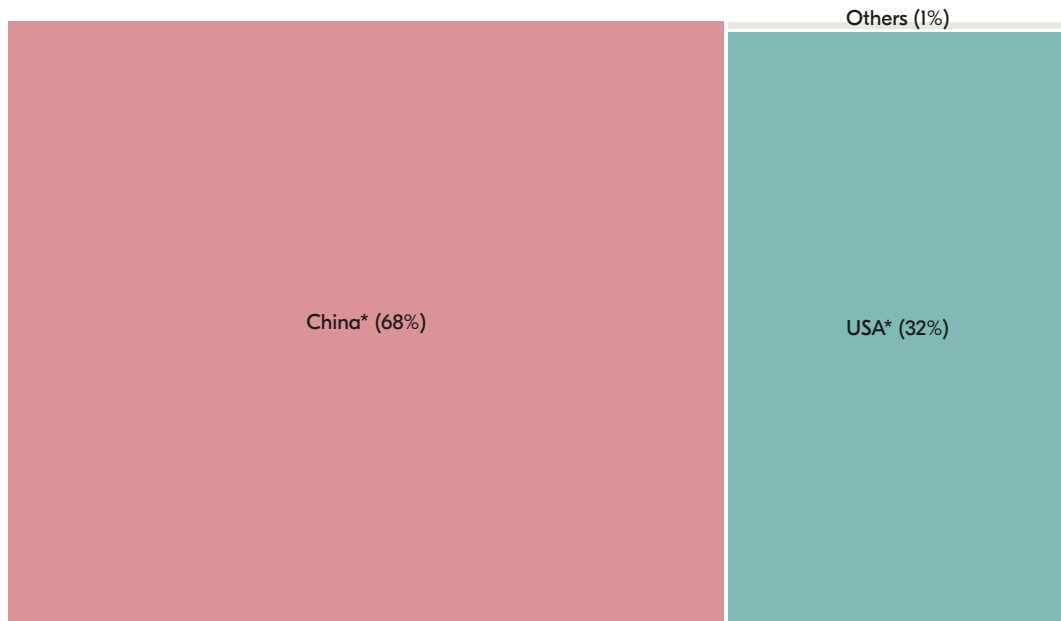
The particularly vulnerable dependencies consist of 47 different commodity codes, corresponding to 0.7 per cent of the value of Sweden's total imports. 85 per cent of these, 40 commodity codes, are intermediate goods.

As in the previous steps, a large share consists of lithium-ion batteries (CN 8507 60 00), for which almost all imports come from China. Salts of metal oxoacids (CN 2841 90 85) are another intermediate good for which China is a major supplier. These are used primarily by the pharmaceutical industry and by industries producing glass and plastics.

Figure 10 illustrates the supply risk countries on which Sweden depends. Almost all particularly vulnerable dependencies relate either to China, which accounts for 67 per cent of import value, or to the United States, which accounts for 32 per cent.³¹ This is not particularly surprising given the importance of these countries as trading partners for Sweden more generally and the way in which their shares in Sweden's strategic and vulnerable dependencies increase at each step of the method (compare to Figures 6 and 8).

31. The third biggest supply risk country for Sweden's particularly vulnerable dependencies is Russia, with a very small share (0.1 per cent of total import value).

Figure 10. Sweden's particularly vulnerable dependencies based on country of origin (share of import value)



Note: Based on Sweden's imports from third countries based on country of origin 2021–2025. Corresponds to strategic commodity codes on which Sweden is import-dependent, where there are limited diversification opportunities and where Sweden is dependent on supply risk countries (Step 4 of the method). * Marks supply risk countries.

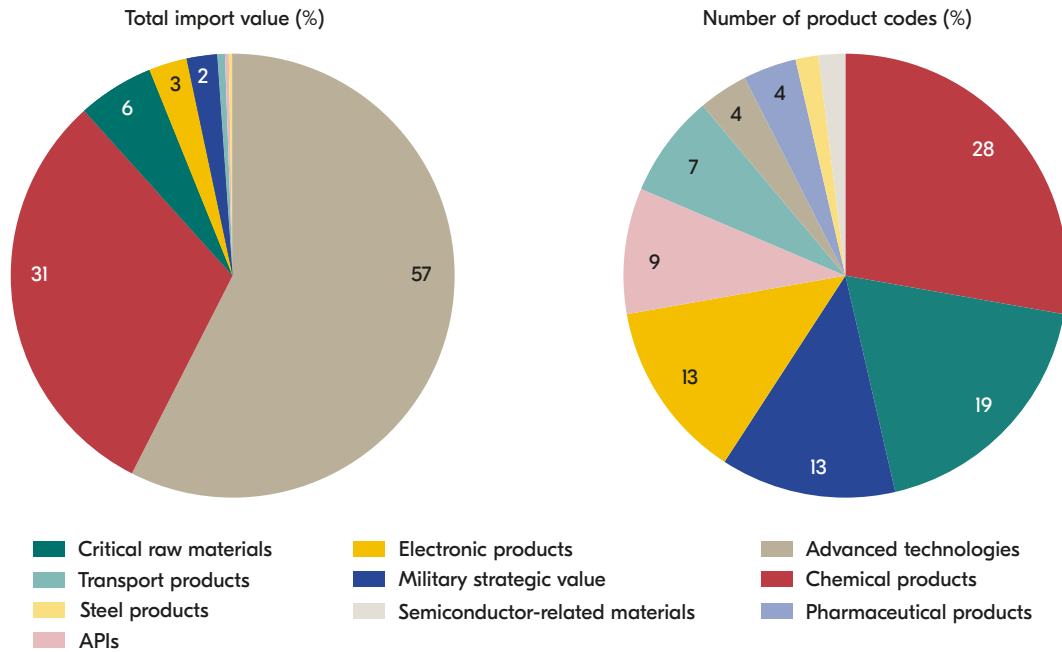
Figure 11 shows the distribution of different types of strategic goods in Sweden's particularly vulnerable dependencies, both in terms of import value and number of commodity codes.

In value terms, Sweden's particularly vulnerable dependencies mainly consist of advanced technologies, at 57 per cent. At the same time, the total number of commodity codes classified as advanced technologies is low, at four per cent. This means that the particularly vulnerable dependency on advanced technologies consists of a small number of types of goods imported at high value from China and the United States.

Chemical products are more evenly distributed, accounting for 31 per cent of import value and 28 per cent of the number of commodity codes. Critical raw materials account for 19 per cent of commodity codes and six per cent of total import value. In terms of number of commodity codes, goods of military strategic value, electronic products, and APIs are also prominent.

The import value of advanced technologies is so large that other types of strategic goods may appear less significant. However, strategic importance cannot be assessed on the basis of value alone. Further analysis and deeper insight are needed to assess the identified particularly vulnerable dependencies.

Figure II. Distribution of strategic goods in Sweden’s particularly vulnerable dependencies on third countries



Note: Based on Sweden’s imports from third countries based on country of origin 2021–2025.

5.5 In depth: Industry-level analysis

The following analysis is based on Sweden’s strategic dependencies, i.e. the goods identified in Step 2 of the method. The analysis uses statistics from Statistics Sweden’s firm-level database and is based on the Swedish Standard Industrial Classification (SNI).

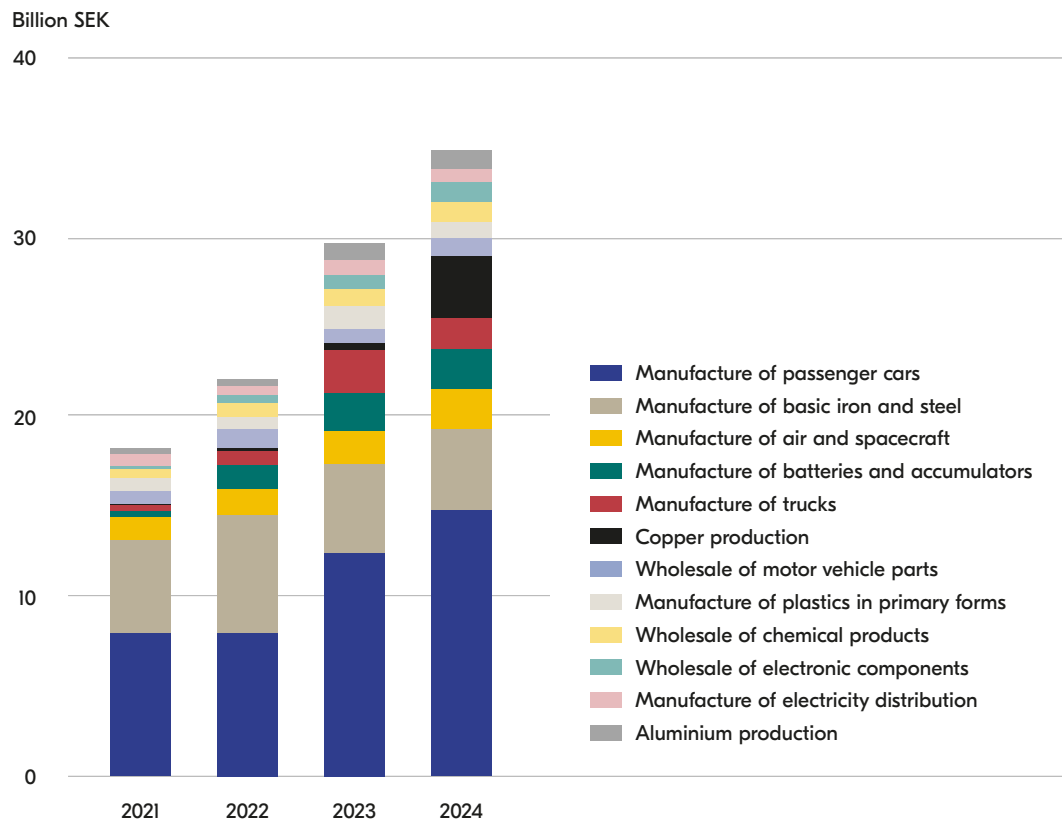
Imports are strongly concentrated in a small number of industrial sectors, with the automotive industry clearly dominant. The industry with the largest imports is the *manufacture of passenger cars and other light motor vehicles* (SNI25 29.101), with total imports exceeding SEK 43 billion. Figure 12 also shows that imports have increased over time, from just over SEK 8 billion in 2021 to around SEK 15 billion in 2024. The industry is mainly strategically dependent on advanced technologies and transport products. Other parts of the automotive industry are also major importers of goods on which Sweden has strategic dependencies. *Manufacture of trucks and other heavy motor vehicles* (SNI25 29.102) has a total import value exceeding SEK 5 billion and, like the passenger car industry, mainly imports advanced technologies and transport products.

Two industries of major importance as suppliers of intermediate goods to many other industries are the *manufacture of basic iron and steel and of ferro-alloys* (SNI25 24.100) and the *production of copper* (SNI25 24.440). The iron and steel industry is the second-largest industry in Table 1, with a total import value of just over SEK 21 billion during 2021–2024. The industry is mainly dependent on critical raw materials, and imports have varied between SEK 4 billion and SEK 7 billion per year, with some decline towards the end of the period. Imports of goods subject to strategic dependencies in the copper industry increased sharply between 2023 and 2024, from just over SEK 270 million to more than SEK 3 billion. The dependency mainly consists of critical raw materials.

Several technology-intensive industries are also dependent on imports of strategic goods. *Manufacture of air and spacecraft and related machinery* (SNI25 30.310 and 30.320) and *manufacture of batteries and accumulators* (SNI25 27.200) both imported goods worth more than SEK 2 billion in 2024. The aerospace industry mainly imports dual-use items, while the battery sector depends on both advanced technologies and critical raw materials.

In addition to manufacturing, wholesale trade also plays a role in Sweden’s strategic dependencies. *Wholesale of motor vehicle parts and accessories* (SNI25 46.720), *wholesale of chemical products* (SNI25 46.750) and *wholesale of electronic components* (SNI25 46.521) are among the twelve industries with the largest imports of strategic goods. These dependencies include critical raw materials, chemical products and advanced technologies.

Figure 12. Imports of goods identified as strategic dependencies, 12 largest industries



Source: Statistics Sweden and own calculations. Note: Largest industries based on total import value 2021–2024. Strategic dependencies are the commodity codes that are identified in step 2 of the method.

6 Policy recommendations

Based on the analytical work and literature review presented in this report, this section sets out a number of recommendations for how efforts to identify and analyse strategic dependencies could be further developed. Some recommendations concern methodological and statistical development, while others relate to how analytical capacities and coordination could be strengthened at national and EU level.

6.1 Strengthen methodological coordination and improve statistics

Establish and disseminate a common methodological framework for identifying strategic dependencies across Member States

A more developed and coordinated approach is needed between the Commission and the Member States in order to respond to the European Council's call of March 2026 to map dependencies in strategic sectors. Since country-specific dependencies may not appear in more aggregate EU-level analyses, the analytical starting point should be at the Member State level. There is therefore a need to establish a common methodological framework for identifying strategic dependencies across the Union, preferably one that goes beyond trade statistics. Such an approach would enable more detailed and context-specific analyses, which can then be consolidated at EU level. This, however, requires better statistics, as well as continued and enhanced methodological support from the Commission.

Coordinate methodologies and definitions between EU policy areas

Work to identify strategic dependencies is currently being carried out in several parallel EU processes, for example in the areas of economic security and critical raw materials. Different EU policy initiatives currently apply partly different definitions, indicators and analytical approaches, which may complicate comparisons and lead to differing assessments of vulnerabilities and dependencies. Methodological development and definitions therefore need to be better coordinated across EU policy areas. As part of this coordination, the EU should develop more practically usable guidance. One concrete example would be to clarify which commodity codes are included in the ten critical technology areas in the EU economic security strategy.

Improve data quality and coverage, with a focus on production statistics

Limited statistical availability affects the ability to identify strategic dependencies in a reliable way. The problems are particularly significant for production statistics, where coverage, level of detail and consistency with international trade statistics are limited. This makes it more difficult to analyse the extent to which imports can be replaced by domestic production. To strengthen the method, statistics need to be improved, above all at the EU level but also nationally. In order to make EU production statistics more consistent with foreign trade statistics, both should be reported using the same nomenclatures, as is already the case for Swedish statistics produced by Statistics Sweden.

Strengthen access to comparable firm-level data across the EU

Access to firm-level data at EU level is an important prerequisite for better identifying differences in dependencies and vulnerabilities across industries. At present, analysis is constrained by limited access to comparable and detailed firm-level statistics between Member States. Efforts should therefore be intensified to improve data access and the coordination of firm-level microdata collection. In particular, common standards, secure data sharing between countries and trusted forms of access to sensitive information need to be developed. This will also improve the comparability of Member States' identified strategic dependencies.

Integrate methods to better capture dependencies in global value chains

International trade takes place in global value chains, where dependencies may arise at several stages between countries and suppliers. Methodologies based solely on direct trade relationships therefore risk missing indirect dependencies and vulnerabilities that emerge along the value chain. It is therefore important to identify dependencies also from a value-chain perspective, drawing on existing methods not least those developed by the OECD based on inter-country input-output tables. An analysis of how dependencies arise and spread along value chains should also be complemented by network analysis to map critical nodes in trade and production networks.

6.2 Enhance cooperation with relevant stakeholders

Involve firms more systematically in dependency analysis

The business perspective should be more clearly and systematically integrated into the mapping of strategic dependencies, both in quantitative analyses and subsequent qualitative assessments of identified dependencies. In quantitative screening exercises, firm-level data can provide a more detailed understanding of dependencies, including by firm size, supplier structures and specialisation patterns. In in-depth qualitative assessments, business expertise can contribute with important contextual knowledge through, for instance, targeted surveys or structured dialogues.

Information from firms may be particularly important for assessing how critical intermediate goods are used in production and the extent to which they can be replaced, as well as for mapping supply chains and supplier structures. In some cases, requesting such information may be necessary, including when it is commercially sensitive. This requires appropriate legal and institutional arrangements for handling sensitive information securely.

Further develop the assessment of the most vulnerable dependencies, particularly regarding substitution possibilities and supply chain risks

Current approaches could be further developed to better distinguish between more and less vulnerable dependencies. One important aspect concerns the extent to which intermediate goods can be substituted with equivalent or functionally similar inputs. This is difficult to assess using quantitative measures alone and calls for sector-specific efforts to map substitution possibilities between intermediate goods. Such efforts require subject-matter expertise and cooperation with industry. The assessment of the most vulnerable dependencies should also take into account additional risk dimensions, including risks related to supplier countries, their geographic distribution, logistics, transport routes and modes of transport.

Consider developing more coherent national processes for identifying strategically important sectors and goods

Which goods or services are considered strategic is decisive for which dependencies are identified, irrespective of the quantitative criteria or methodology used. Existing assessments at both national and EU level have often been sector-specific and based on different definitions and approaches. There is therefore reason to examine how more coherent national processes for identifying strategically important sectors and goods can be developed. While definitions will necessarily differ between countries, the EU or OECD could contribute by developing broader frameworks or guiding principles for how such assessments could be carried out.



7 Conclusions

This report presents a quantitative approach to identifying strategic dependencies in Swedish imports from third countries. The proposed methodology is based on a step-wise screening process in which identified import dependencies are progressively narrowed down according to strategic importance, possibilities for global diversification and exposure to so-called supply risk countries.

This step-by-step approach makes it possible to distinguish between different types of dependencies and to identify those that are particularly vulnerable. The method is based on a broader conceptual framework for analysing dependencies, which we propose with the aim of contributing to a more coherent and common understanding across policy areas of what constitutes a strategic dependency.

When applied to Swedish imports, the results show that Sweden has import dependencies in 818 commodity codes, of which 323 are classified as strategic dependencies. Of these, 97 are assessed as vulnerable due to limited diversification possibilities, while 47 commodity codes are identified as particularly vulnerable dependencies due to exposure to supply risk countries.

A large share of the identified dependencies is used as intermediate inputs in industry, particularly in areas such as advanced technologies, chemical products and critical raw materials. This underlines that strategic dependencies are primarily linked to production processes and value chains, rather than to final consumption. It also suggests that import dependencies of intermediate goods may affect Sweden's export capacity in the event of disruptions, as imported intermediate goods are used in the production of more processed goods that are subsequently exported. The Swedish industries with the largest imports of strategic goods are primarily the automotive industry, the iron and steel industry and technology-intensive industries.

The results also show that the importance of trading partners changes as the analysis moves from broad import dependencies to strategic and vulnerable dependencies, characterised by limited diversification possibilities and higher supply risk. Norway is a clear example. Although Norway is Sweden's largest trading partner outside the EU, its exports to Sweden largely consist of goods that are neither strategically important nor particularly vulnerable. In contrast, dependencies on other major trading partners – especially China and the United States – become more prominent in the later stages of the method, as these countries are more strongly associated with goods of strategic importance and limited diversification possibilities.

As a result, Sweden's vulnerable and particularly vulnerable dependencies are almost exclusively concentrated in China and the United States. China is one of Sweden's and the EU's largest trading partners and an important supplier of several strategic goods, not least advanced technologies and critical raw materials. At the same time, the relationship is increasingly shaped by trade policy tensions and concerns related to state intervention and overcapacity. This means that dependencies are both difficult to replace and associated with risks, including those linked to concentration, limited transparency and trade policy measures. The United States also plays a prominent role in the more vulnerable dependencies. In a context where trade policy is increasingly used to pursue national security and geopolitical objectives, it is therefore important to analyse dependencies broadly and on the basis of risk assumptions grounded in observed conditions.

One ambition of this report has been to contribute to the ongoing methodological discussion within the EU and to broader efforts, including at a national level, to identify and analyse strategic dependencies. The recommendations presented in the preceding section, together with the conclusions from the literature review in Section 2.3, reflect this ambition.

The approach proposed in the report differs in certain respects from that of the European Commission. It takes domestic production into account in the measurement of import dependency and proposes a complementary measure to integrate production within the EU. It also considers risks linked to trading partners and gives global diversification possibilities a more prominent role in the analysis. The method is also applied at a more detailed product level, and thresholds are determined based on the statistical distribution of indicators rather than predetermined levels. In addition, the method takes into account the fact that export restrictions may reduce imports and thereby affect which dependencies are identified.

At the same time, there are limitations in our method compared with that of the European Commission, not least regarding the underlying statistics. Based on the trade statistics used here, it is not possible to identify which goods are re-exported, either from Sweden or via third countries. This is more feasible using the database applied by the Commission in Arjona et al. (2023). The Commission's approach also includes elements of network analysis to examine critical nodes and spillover effects in the supply chains, which are not included in our method.

It is important to emphasise that the proposed method identifies strategic dependencies on the basis of available statistics and quantitative criteria. What is considered strategic is also fundamentally a normative assessment and is of decisive importance for which dependencies are captured by the analysis. The results therefore cannot be assessed solely on the basis of the number of commodity codes classified as strategic dependencies or their import value. As a basis for decision-making, the quantitative screening process needs to be complemented by more in-depth analysis of sector- and industry-specific conditions. These include factors such as market structure, which firms are affected, how the goods associated with identified dependencies are used in the economy, and the extent to which they can be replaced. Such assessments will largely need to be based on dialogue between public authorities, industry and other relevant stakeholders.

Strategic dependencies change over time and are influenced by both market developments and political decisions. Efforts to identify and analyse dependencies should therefore be continuous, and methodologies should be updated when necessary. These methodologies could also serve as a basis for the monitoring of trade flows and integrated into systems for identifying disruptions in foreign trade, for example in the form of dashboards. Similar functions are being developed at EU level, including through the Commission's work on supply chain analysis.

Finally, a more developed and coordinated approach is needed between the Commission and the Member States in response to the European Council's March 2026 call to map dependencies in strategic sectors. Such an approach should build to a greater extent on Member States' own assessments, as country-specific dependencies may otherwise be overlooked in more aggregate EU-level analyses. A bottom-up process of this kind would enable more detailed and tailored analyses, which could then be consolidated at EU level. This, however, requires both better statistics and methodological support from the Commission.

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Appendix A: Statistics

The analysis uses data from several different sources, which are combined to create a complete dataset. To combine all sources, we use the Combined Nomenclature (CN), the EU's common eight-digit classification system for goods. The first six digits of each CN code are based on the Harmonised System (HS), the international nomenclature for classifying goods.

All statistics are described in detail below.

Production statistics

EU production

Eurostat's Prodcom database has been used to identify EU production at CN8 level. This database contains statistics on Member States' production of goods identified through Prodcom codes.

The database makes it possible to link trade statistics and production statistics, but there are several important limitations. First, the match between Prodcom and the Combined Nomenclature is not perfect. This means that some commodity codes may have no corresponding Prodcom code, in which case no production of that good is reported in Eurostat. Second, there are missing observations and values in the database. It is not possible to determine whether this is because a good is not produced, because the quality of the statistics is insufficient, or because data are not reported due to statistical confidentiality.

This analysis uses production statistics for 2021–2024. For 2025, it is assumed that a good produced in the EU in 2024 was also produced in 2025. Since foreign trade statistics are available for 2025, the same production value is assumed for 2025 as for 2024. Priority has been given to using the most recent import statistics available. For the years 2021–2025, 4,788 unique commodity codes are identified in Prodcom across 23,940 observations. Of these, 16 per cent are missing values and 83 per cent report actual production values.

The production statistics are matched to the Combined Nomenclature using a correspondence table. In this matching exercise, 91 per cent of all observations have a corresponding code in the Combined Nomenclature. Of the nine per cent that cannot be matched, five per cent report production.

Although EU production statistics play an important role in identifying strategic dependencies in this report, the quality of the statistics is limited and the results should therefore be interpreted with caution.

Swedish production

Statistics Sweden collects data on Swedish production and reports them in the Industrial Goods Production database. The statistics cover goods production in industry (SNI 05-33) and industrial services linked to the manufacturing process, but not agriculture, forestry and fishing or construction.

The survey is a sample survey including firms with more than 20 employees. In some industries, firms with at least 10 employees or with a certain turnover level are also included. Smaller firms are not normally included in the survey, but their production is estimated through imputation. The data for 2024 are preliminary, with final figures to be published in April 2026.

The statistics are used, among other things, as input to the national accounts and for reporting to the EU under Prodcod. Statistics Sweden reports production statistics according to the Combined Nomenclature, which makes them consistent with Swedish foreign trade statistics.

This analysis uses statistics for 2021–2024. For 2025, it is assumed that a good produced in Sweden in 2024 was also produced in 2025. The same production value is therefore assumed for 2025 as for 2024. This is because foreign trade statistics are available for 2025 and priority has been given to using the most recent import statistics possible.

For the years 2021–2025, 10,100 unique commodity codes according to the Combined Nomenclature are identified across 49,800 observations. Eighteen per cent of the observations are missing due to confidential data. It cannot be determined whether, and if so, how much Sweden produces of the goods for which data are confidential. Among the goods for which this report finds that Sweden has strategic dependencies, some are subject to confidentiality in production statistics. These goods are clearly marked in the result lists.

Statistics Sweden reports production statistics according to the CN8 codes valid for each reference year. When product classifications change, historical statistics are not revised to the new code structure. For years in which a specific commodity code did not yet exist in the nomenclature, this is reported as a missing value.

The statistics are downloaded as a balanced panel dataset. This means that all CN8 codes that occur in any of the years covered by the study are included for each individual year, regardless of whether the code was actually valid in that year. Information on how this has been handled in the data processing is provided under Handling updates to the Combined Nomenclature.

Trade statistics

Swedish imports

For statistics on Swedish imports, two types of data have been used: imports by country of origin and imports by country of dispatch. An important difference between the two is that country of origin refers to the country where the good underwent its last substantial transformation, while country of dispatch refers to the last country in which the good was located before arriving in Sweden.

Within the EU, there are no statistics on country of origin, which means that intra-EU trade statistics are always based on country of dispatch. To capture actual dependencies on third countries, this report focuses on imports by country of origin. Statistics on Swedish imports by country of dispatch are used only in the calculation of the share of third-country imports in total supply.

Statistics on Sweden's imports by country of origin are obtained from Statistics Sweden. For the years 2021–2025, there are 17,135 commodity codes according to the Combined Nomenclature.

Global exports

Statistics on global exports are obtained from Trade Data Monitor. These statistics are used to calculate global export concentration and thereby assess diversification opportunities.

Because global export statistics are reported at HS6 level, this part of the analysis cannot use the more detailed CN8 level. This means that all CN8 codes covered by the same HS6 code are assumed to share the same global export concentration.

Strategic goods

The analysis uses several existing lists of strategic goods and sectors. The list is not exhaustive, but provides relatively high coverage in terms of the number of commodity codes included.

The strategic sectors selected for this analysis are active pharmaceutical ingredients (APIs), advanced technologies, critical raw materials and processed materials, semiconductor materials, and goods of military strategic value, including dual-use items.

A broader list of strategic goods is also included, covering chemicals, pharmaceutical products, steel, electronic products, defence, transport and energy products.

Table I. List of strategic sectors and sources

Sector	Level of detail	Source
Active pharmaceutical ingredients (APIs)	HS6	Key trade data points on the EU27 pharmaceutical supply chain
Advanced technologies	HS6	Advanced technologies for industry – methodological report
Critical raw materials and processed materials	CN8	JRC Publications Repository – Trade codes of non-food, non-fuel raw materials and their products
Semiconductor-related materials	CN8	JRC Publications Repository – EU's strengths and weaknesses in the global semiconductor sector
Goods of military strategic value, including dual use items	HS6	JRC Data Catalogue – Dataset – European Commission
Chemicals, pharmaceuticals, steel, electronics, defence, transport and energy products	HS6	CEPII (Lefebvre and Wibaux 2024)

Handling updates to the Combined Nomenclature

Statistics Sweden reports statistics on Swedish imports and production for the CN8 codes valid in each respective year. When the product classification changes, historical statistics are not updated to the new code structure.

To enable comparisons over time, the statistics have been updated to the code structure that applied in 2025. For each year, commodity codes that changed are identified. These codes are matched to new codes and, where possible, updated consistently across the whole time period.

The matching has been carried out in cases where the relationship between codes changed either one-to-one (1:1) or many-to-one (m:1), that is, where several older codes correspond to a common code in a later classification. By contrast, commodity codes that were split into several new codes (1:m) could not be included in this harmonisation, resulting in some loss of data.

Of all CN8 codes that existed between 2021 and 2025, 94 per cent exist in all years. For the strategic products defined at HS6 level, eight per cent do not exist in all five years. In terms of number of commodity codes, this corresponds to 466 unique CN8 codes that do not exist in all years between 2021 and 2025. The next delimitation is to consider commodity codes that Sweden actually imported during those years, which gives a total of 345 commodity codes.

Supply risk countries

The selection of supply risk countries is based on countries that, according to Global Trade Alert, have introduced harmful export restrictions directed at the EU or one of its Member States since 2016.

The measures included are export bans, export taxes, tariff-rate quotas, export quotas, export licensing requirements and other export-related non-tariff measures. This produces a gross list of 55 countries, including Russia, Indonesia and India, but also the United States, Norway and EU countries. Countries subject to EU sanctions are then added, including Afghanistan and Venezuela.

From this group, EU and EFTA countries, former EU Member States (the United Kingdom), and countries with EU candidate status are excluded. Countries with which the EU has free trade agreements that are in force and notified under Article XXIV of GATT are also excluded. This does not include countries that have not yet ratified regional agreements, such as Haiti under CARIFORUM.

Countries with which the EU has active ongoing or recently concluded free trade negotiations are also excluded.

Appendix B: Complementary analysis and results

Complementary analysis: Substitutability

As a complementary analysis, we build on Step 3 to also analyse substitution possibilities for the strategic goods where diversification opportunities are limited. The purpose of this complementary analysis is to illustrate how the method could be further developed in the future if higher-quality statistics with better coverage become available.

Swedish import statistics are obtained from Statistics Sweden, while data on EU production are based on Eurostat Prodcom. Since Prodcom is not reported at CN8 level, Prodcom codes have been matched to CN8 codes, resulting in some loss of data coverage.

Substitution refers here to Sweden's ability to replace imports from third countries with imports from the EU. One criterion is that the good must be produced within the EU and that production must be sufficiently large for it to be reasonable to assume that Sweden could substitute third-country imports with intra-EU imports.

Import values in Swedish kronor have been converted into euros using the Riksbank's annual average exchange rate.

Substitution possibilities are calculated as follows:

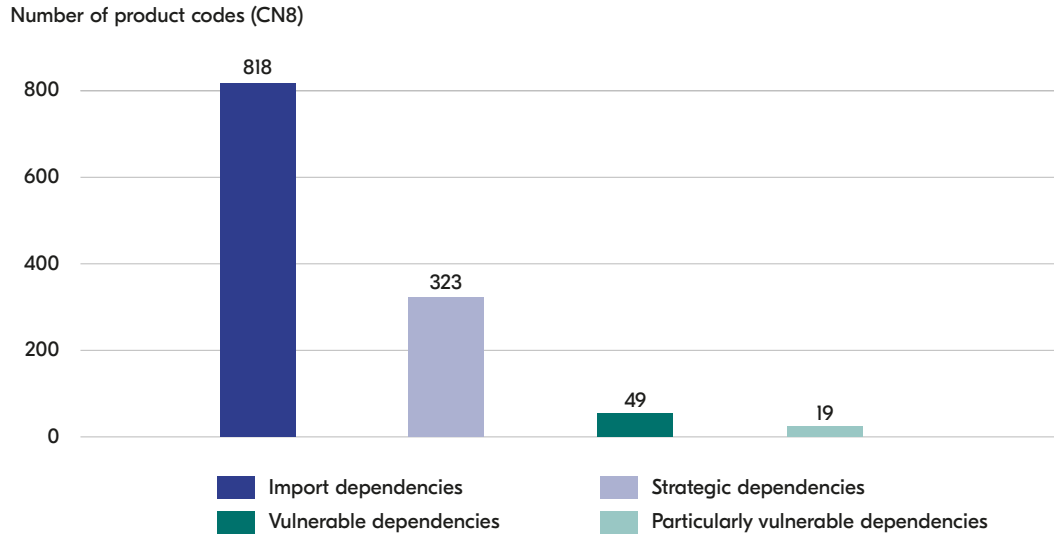
$$Substitution_{v,t} = \frac{Imports\ from\ third\ countries_{v,t}}{Production\ within\ the\ EU_{v,t}}$$

Here too, we use the distribution and the 75th percentile to set a threshold value. For goods that exceed the thresholds for both diversification (0.2489) and substitution (0.0036), the possibilities are assessed as limited. These goods are then analysed further with regard to exposure to supply risk countries.

Results of the complementary analysis

In the complementary analysis (Figure 13, the criteria in Step 3 are that both diversification opportunities and substitution possibilities must be limited. This results in 49 commodity codes with vulnerable strategic dependencies. Of these, 19 are particularly vulnerable dependencies. This can be compared with the main method, where Step 3, without including substitution possibilities, identified 97 goods with vulnerable dependencies and 47 particularly vulnerable dependencies in Step 4. The number of commodity codes in Steps 1 and 2, import dependencies and strategic dependencies respectively, remains unchanged.

Figure 13. Complementary analysis: Number of commodity codes (CN8) in each step of the method

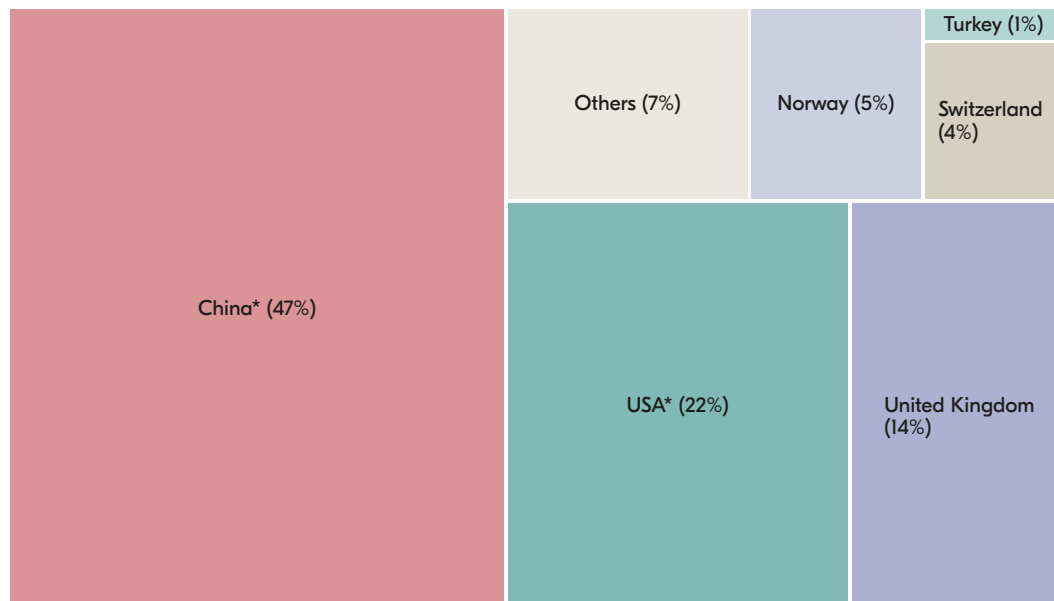


Note: Based on Sweden's imports from third countries based on country of origin 2021-2025.

The 49 vulnerable dependencies for which neither diversification nor substitution possibilities are available consist of 78 per cent intermediate goods, 9 per cent capital goods and 12 per cent consumer goods.

Figure 14 shows Sweden's vulnerable dependencies where neither diversification nor substitution possibilities are available. China is the country of origin on which Sweden is most dependent, followed by the United States and the United Kingdom. Compared with Section 5.3, where only diversification opportunities were analysed, fewer countries appear here.

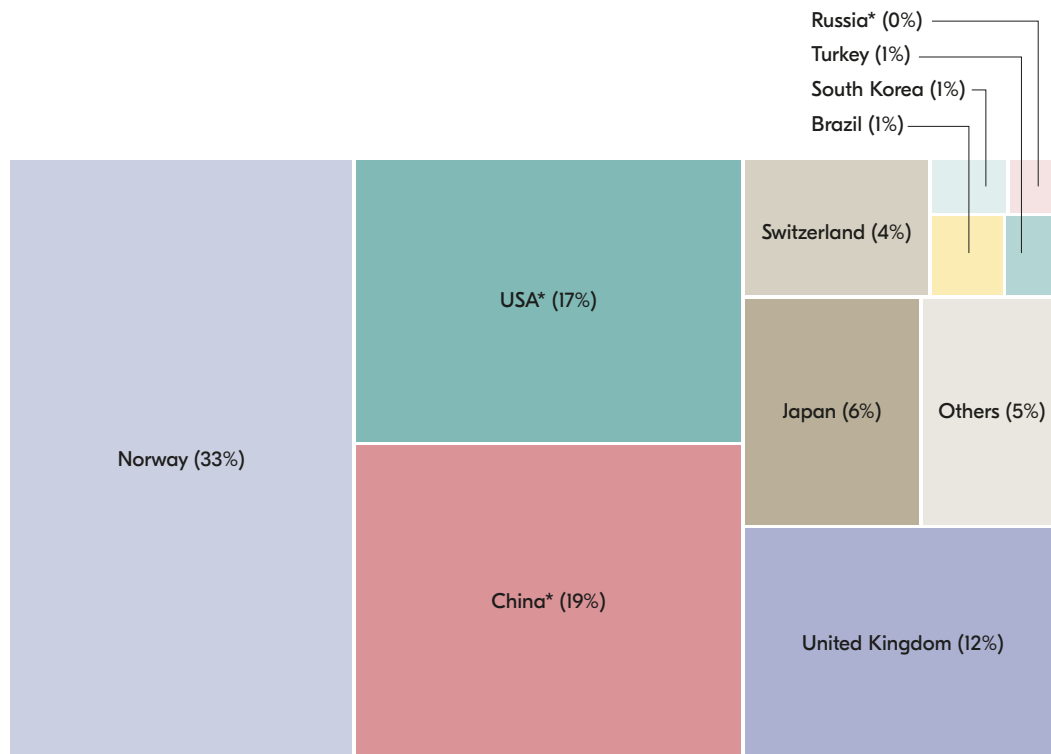
Figure 14. Complementary analysis: Sweden's vulnerable dependencies based on country of origin (share of import value)



Note: Based on Sweden's imports from third countries based on country of origin 2021-2025. * Marks supply risk countries.

Figure 15 shows Sweden’s particularly vulnerable dependencies where neither diversification nor substitution possibilities are available and where a significant share of imports comes from supply risk countries. As in the results presented for Sweden’s particularly vulnerable dependencies in Section 5.4, the dependency consists of China and the United States. These dependencies consist of 84 per cent intermediate goods. The remainder consists of 4 per cent capital goods and 12 per cent consumer goods.

Figure 15. Complementary analysis: Sweden’s particularly vulnerable dependencies based on country of origin (share of import value)



Note: Based on Sweden's imports from third countries based on country of origin 2021-2025. * Marks supply risk countries.

Sammanfattning

Summary in Swedish

Ömsesidiga beroenden mellan handelspartners är en grundläggande del av det globala handelssystemet. Samtidigt har ökade geopolitiska spänningar, mer komplexa värdekedjor och återkommande störningar i leveranskedjor tydliggjort att vissa beroenden även innebär sårbarheter. Det har ökat behovet av att bättre förstå vilka beroenden som kan få särskilt stora konsekvenser för samhället vid störningar.

I denna utredning föreslås en kvantitativ metod för att identifiera strategiska beroenden, som därefter tillämpas på Sveriges import från tredjeland. Metoden bygger på en stegvis urvalsprocess i fyra delar: (1) identifiering av importberoenden, (2) avgränsning till strategiska varor, (3) identifiering av sårbara beroenden genom begränsade diversifieringsmöjligheter globalt, samt (4) identifiering av särskilt sårbara beroenden genom exponering mot vad vi kallar försörjningsrelaterade riskländer.

Resultaten visar att Sverige är importberoende av 818 varukoder, varav 323 klassas som strategiska beroenden. Av dessa bedöms 97 vara sårbara och 47 särskilt sårbara. Bilden av Sveriges beroenden förändras när olika kriterier tillämpas i de fyra metodstegen, vilket är särskilt tydligt avseende handelspartners. En stor del av importen från Norge avser varor utan strategisk betydelse eller med goda diversifieringsmöjligheter, medan de mer sårbara beroendena nästan uteslutande är koncentrerade till Kina och USA. En betydande del av de identifierade beroendena utgörs av insatsvaror till industrin, särskilt inom områden som avancerade teknologier, kemiska produkter och kritiska råmaterial. Det visar att strategiska beroenden i hög grad är kopplade till produktion och värdekedjor, snarare än slutkonsumtion.

Flera rekommendationer för vidareutveckling av metoden görs i utredningen, varav några av de viktigaste rör ökad metodsamordning inom EU, statistikutveckling, behovet av mer samstämmiga nationella ansatser för att identifiera vad som är strategiskt, samt bättre verktyg för att fånga indirekta beroenden i globala värdekedjor. Det är viktigt att betona att metoden identifierar beroenden baserat på en genomgång av tillgänglig statistik utifrån kvantitativa kriterier, samt att vad som är strategiskt är en normativ bedömning av avgörande betydelse för resultaten. Som beslutsunderlag behöver resultaten av dessa skäl kompletteras med fördjupade, kvalitativa bedömningar. Vidare förändras strategiska beroenden över tid, vilket innebär att analysen behöver uppdateras löpande.

The National Board of Trade Sweden is the government agency for international trade, the EU internal market and trade policy. Our mission is to facilitate free and open trade with transparent rules as well as free movement in the EU internal market.

Our goal is a well-functioning internal market, an external EU trade policy based on free trade and an open and strong multilateral trading system.

We provide the Swedish Government with analyses, reports and policy recommendations. We also participate in international meetings and negotiations.

The National Board of Trade, via SOLVIT, helps businesses and citizens encountering obstacles to free movement. We also host several networks with business organisations and authorities which aim to facilitate trade.

As an expert agency in trade policy issues, we also provide assistance to developing countries through trade-related development cooperation. One example is Open Trade Gate Sweden, a one-stop information centre assisting exporters from developing countries in their trade with Sweden and the EU.

Our analyses and reports aim to increase the knowledge on the importance of trade for the international economy and for global sustainable development. Publications issued by the National Board of Trade only reflect the views of the Board.

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