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Report Highlights:

The Swedish food retail market is estimated at $45 billion and is dominated by ICA, Axfood, and Coop, together controlling 90 percent of the sales. Most purchases take place at physical stores and online sales remain small at around four percent but growing. Several Swedish hypermarkets have an “USA” section or “Amerikanskt” section, offering a selection of U.S. products. Several non-food stores also offer specialty packaged foodstuffs, including confectionery and snack products from the United States. The alcohol monopoly Systembolaget offers a good selection of distilled spirits, wines, and craft beer from the United States. Sweden has one of the highest GDPs per capita in Europe, but price still matters, especially for everyday groceries. At the same time, consumers continue to buy premium and indulgent items, balancing value-consciousness with a willingness to pay for quality.

Market Fact Sheet: Sweden

Executive Summary:
Sweden is a country centrally located in the Nordics and borders Norway and Finland and connects to Denmark via a bridge. Its principal cities are Stockholm, Gothenburg, and Malmö. Sweden is a modern, developed economy and has a high standard of living. Its population totals over ten million. The United States is its fifth largest ($205 million) non-EU supplier of agricultural and related products, after Norway, the UK, Brazil, and China.

Imports of Consumer-Oriented Products:
Products from other EU Member States lead Swedish imports of consumer-oriented products. In 2025, the United States was the fifteenth largest supplier of these products to Sweden.

	2025
EU	13,502
Non-EU:	1,850
-United Kingdom	282
-Norway	213
-United States	130
-Other Non-EU	1,225
Total	15,352

Source: Trade Data Monitor

Food Processing Industry:
About 3,000 food companies generated a combined turnover of $22 billion. The industry employs about 45,000 people annually. The most important sectors are dairy, meat, and bakery. Food processing plants largely depend on imports due to the climate and the short growth season.

Food Retail Industry:
The Swedish food retail market was valued at $45 billion and ICA Gruppen, Kooperativa Förbundet Group, and Axel Johnson have a combined market share of 90 percent. Sweden has about 3,100 grocery stores, with sales driven by physical retail. Locally produced and private label products are gaining in popularity.

Foodservice – HRI Industry:
Total sales of the HRI foodservice industry were valued at $20 billion, supported by the improving Swedish economy. Most channels grew while full-service restaurants continued to dominate total HRI foodservice sales.

Quick Facts CY2025
Imports of Consumer-Oriented Products, total:
$15.4 billion

List of Top 10 Growth Products in Sweden (imported from the World):

1. Cheese	6. Water (flavored)
2. Coffee	7. Cocoa preparations
3. Bakery products	8. Live plants
4. Confectionery	9. Condiments & sauces
5. Pet food	10. Non-alc. beverages

Food Industry by Channels 2025, in $ billion

Consumer-Oriented Products Imports	$15.4
Consumer-Oriented Products Exports	$7.5
Agricultural & Related Products Imports	$29.6
Agricultural & Related Products Exports	$21.5
Food Processing Industry	$22.0
Food Retail	$45.0
Food Service	$20.0

Largest Food Retailers, Market Share:

1. ICA	50%	5. City Gross	3%
2. Axfood	23%	6. OKQ8	1%
3. COOP	16%	7. Circle-K	1%
4. Lidl	6%		

Strengths/Weaknesses/Opportunities/Challenges:

Strengths: Strong demand for branded American packaged consumer goods, especially those that are iconic or offer unique and innovative features. Increasing demand for ready-to-drink mixes, low- or no-alcohol beverages, and other non-alcoholic drinks.

Weakness: Shipping costs and import tariffs make U.S. products more expensive. U.S. products do not automatically meet EU labeling requirements. There is fierce competition on price, quality, uniqueness, and innovation from other EU member states and from third countries.

Opportunities: Swedes like to try new food concepts and international cuisines, including Tex-Mex and Italian. Whenever the weather allows, Swedes enjoy outdoor barbecuing and grilling during the weekend.

Threats: The Swedish National Food Strategy encourages consumers to choose Swedish products. Meat, dairy, eggs, vegetables, cereals, and processed foods often carry the Från Sverige ("From Sweden") label.

Data and Information Sources: Trade Data Monitor, industry experts, company websites
Contact: FAS The Hague, agthehague@usda.gov

SECTION I. DETAILED MARKET OVERVIEW

Introduction

Sweden is a country in the Nordic region with thousands of coastal islands and inland lakes, along with vast boreal forests and glaciated mountains. With 450 thousand square kilometers, it is the largest country in the Nordics and borders Norway and Finland and connects to Denmark via a bridge. Its principal cities, the eastern Stockholm and southwestern Gothenburg and Malmö, are all coastal. Capital Stockholm is built on 14 islands and has more than 50 bridges. Sweden is a constitutional monarchy and their king since 1973 is Carl XVI Gustav. Sweden has been a member of the European Union (EU) since 1995 but decided not to adopt the Euro which makes the Swedish Krona (SEK) the currency.

Overall Business Climate

Sweden, with a GDP of $610 billion (2024) and a population of 10.7 million, is the largest Nordic economy and boasts a transparent, highly developed, sophisticated, and diversified market with few barriers to entry. Sweden ranks among the top 10 worldwide on several competitiveness studies (WEF, IMD). This is due in part to Sweden's export-oriented manufacturing sector, competitive small and medium-sized enterprises, and budgetary discipline. Sweden also consistently ranks high for its connectivity, governance, investment in R&D, and business climate. As such, many foreign firms establish operations in Sweden when looking to enter or expand into the Nordics and/or the Baltics. Additional information can be found in the U.S. Department of Commerce's Sweden Country Commercial Guide.

Sweden relies heavily on imports due to its climate, with severe winters and short growing season. In 2025, imports of agricultural and related products totaled $29.6 billion of which over 60 percent came from Norway, the Netherlands, Denmark, Germany, and Poland. Norway is also Sweden's largest non-EU supplier (driven by supply of Norwegian salmon) followed by the U.K., Brazil, China, and the United States. Swedish imports of agricultural and related products from the United States were valued at $205 million in 2025. The United States is Sweden's third largest export market (after Norway and the U.K.) for agricultural and related products outside the EU, equaling $885 million, driven by strong export figures of wood sawn.

Advantages (product strengths and market opportunities)	Challenges (product weakness and competitive threats)
Demand is strong for branded American packaged consumer goods, especially those that are iconic or offer unique and innovative features. Consumers are receptive to new products.	The Swedish National Food Strategy encourages consumers to choose Swedish products. Meat, dairy, eggs, vegetables, cereals, and processed foods often carry the Från Sverige ("From Sweden") label.
Swedes like to try new food concepts and international cuisines. Taco Friday is popular and eating pasta is gaining popularity. Whenever the weather allows in spring and summer, Swedes enjoy barbecuing and grilling outdoors, often spending weekends cooking and socializing at their country houses.	Transatlantic transportation is costly. Some products from the United States are subject to import tariffs. Suppliers from other EU member states have a competitive advantage on tariffs and non-tariff trade barriers and transportation costs and time.
Importers of packaged foods in Sweden	The EU has several Free Trade Agreements

frequently distribute to other Nordic markets as well.	that may advantage other third country competitors, including Canada, Mexico, and MERCOSUR.
There is also increasing demand for ready-to-drink mixes, low- or no-alcohol beverages, and other non-alcoholic drinks.	U.S. beef from hormone-treated cattle, poultry, flour bleaching agents, certain colors, allulose, and products containing GMO derived ingredients that are not EU approved cannot be exported to Sweden.
Sweden relies entirely on imports for products such as wine, tree nuts, and dried fruits.	Fierce competition on price, quality, uniqueness, and innovation. Standard U.S. product labels fail to comply with EU labeling requirements.

SECTION II. EXPORTER BUSINESS TIPS

Food Retail Sector

The Swedish food retail market is projected to reach approximately SEK 410 billion ($45 billion[1]) in turnover in 2025, up by SEK 8 billion ($1 billion) from 2024, representing annual growth of around two to three percent, supported by inflation and modest volume gains. The market remains highly concentrated, with the three largest retailers — ICA, Axfood, and Coop — accounting for roughly 90 percent of total grocery sales, making it one of the most consolidated markets in Europe. Sweden has about 3,100 grocery stores, with sales still overwhelmingly driven by physical retail. Online grocery sales remain relatively small at around four percent of the total, though they continue to expand. Private label products are also becoming increasingly important, representing just over 25 percent of total food sales in 2025 and contributing significantly to recent market growth. For more on private label, seehttps://plmainternational.com/news/plma-live-eu.

Table 1: An Overview of Sweden's Purchase Groups

Purchase Group	Estimated Market Share, percentage	Retail chains
ICA Gruppen AB Svetsarvägen 16 SE-171 93 Solna, Sweden +46 8 56 15 00 00 www.icagruppen.se	50	ICA Maxi – hypermarkets ICA kvantum – large supermarkets ICA Supermarket – mid-size supermarkets ICA Nära – convenience stores
Axel Johnson AB Norra stationsgatan 80 C SE-107 69, Stockholm, Sweden +46 8 553 99 000 info@axfood.se www.axfood.se	23	Willy's Hemköp Tempo Handlarn Eurocash
Kooperativa Förbundet Group (COOP)	16	Coop Stora – hypermarkets (supermarket and department store)

[1] 1 SEK = 0,11 USD

Englundavägen 4 SW 17188 Solna, Sweden +46 10 740 00 00 www.coop.se		Coop – mid-size supermarkets Coop MaxiMat
Schwarz Beteiligungs GmbH Barkarbyvägen 5, SE-177 45, Järfälla, Sweden +46 8 55 55 70 00 www.lidl.se	6	Lidl – discount supermarkets
Bergendahl & Son AB Industrigatan 22 SW-281 43 Hässleholm, Sweden +46 451 480 00 www.citygross.se	3	City Gross – discount large supermarkets
OK-Q8 AB Sveavägen 155, SW-113 46, Stockholm, Sweden	1	OKQ8 – convenience stores
Alimentation Couche-Tard Inc Torkel Knutssonsgatan 24, SW- 118 49, Stockholm, Sweden	1	Circle K – convenience stores

Source: Euromonitor, industry source, Wikipedia, company websites

Supermarkets — including hypermarkets, full-service stores, convenience stores, and discount outlets — dominate Sweden's food retail sector, leaving very few independent grocery shops. The Kooperativa Förbundet Group, together with its Nordic counterparts Danish Coop amba (Danish Consumers Cooperative Society) and Norwegian Coop Norge SA, operates under the COOP Norden retail chain. Lidl, on the other hand, is a German discount supermarket chain.

Beyond traditional food retailers, several non-food stores also feature food sections, often stocked with specialty packaged products such as confectionery and snacks, many imported from the United States, see below. Examples of such retailers include EKO (https://www.ekostormarknad.se/), O&B (https://www.xn--ob-eka.se/), and Normal (https://www.normal.eu/).

In recent years, rising living costs and food inflation have influenced consumer behavior, especially for essential products. Price sensitivity has increased, resulting in shoppers more actively comparing prices, looking for discounts, and switching between retailers or brands to get better value. There is a slight growth of discount chains, like Lidl and Willys (Axfood), reflecting a shift toward lower-priced options. Private labels are more popular as these store brands offer cheaper alternatives to (inter)national brands while maintaining quality. For specialty or indulgence products, there is a premiumization trend and consumers are willing to pay more for innovation, quality, taste, and (international) brands.

Swedish hypermarkets, including ICA Maxi, often offer a selection of U.S. products, either as a branded product or an ingredient, including confectionary, bakery products, condiments and (BBQ) sauces, non-alcoholic beverages, dried fruit (raisins), and tree nuts (almonds). Some supermarkets even have an "USA" section or "Amerikanskt" section (Swedish for American). The alcohol monopoly Systembolaget offers a good selection of distilled spirits, wines, and craft beer from the United States.

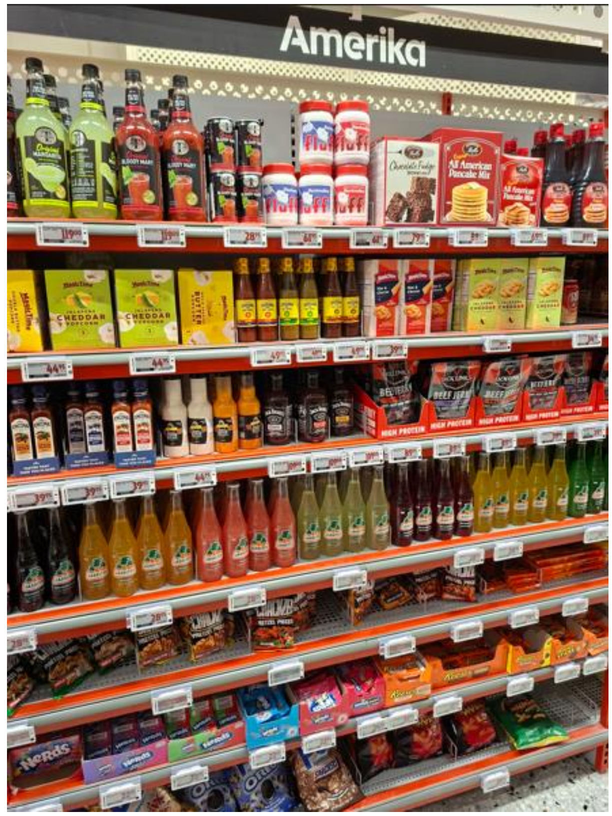
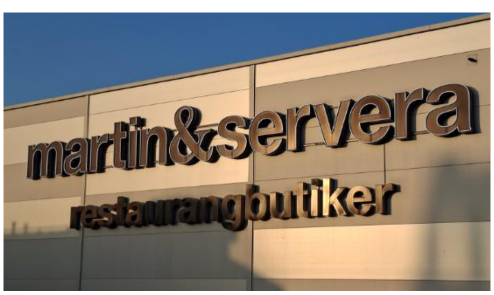


Table 2: Sweden's Alcohol Monopoly Systembolaget

Purchase Group	Retail chain
Systembolaget AB Kungsträdgårdsgatan 14 SE-103 84, Stockholm, Sweden +46 8 503 303 95 www.systembolaget.se	There are over 400 liquor stores in Sweden and they are the only stores that are allowed to sell alcoholic beverages that contain more than 3.5 percent alcohol.

Source: FAS/The Hague

HRI Foodservice Sector



According to Euromonitor International, a market research provider, total sales of the HRI foodservice industry in 2025 were valued at SEK182 billion ($20 billion), up by three percent compared to 2024. According to Euromonitor's Consumer Foodservice Report of March 2026, the improving Swedish economy continued to support consumer foodservice in Sweden in 2025 with most channels seeing positive growth.

The main trends included strong demand for food delivery and further growth in delivery apps such as Foodora and Wolt, the shift towards more sustainable food options, along with demand for healthier options as the health and wellness trend continued. Full-service restaurants' sales ($11 billion) dominate total HRI foodservice sales, followed by limited-service restaurants and cafés/bars with respectively $4.4 billion and $3.4 billion in sales. The two largest wholesalers in Sweden are Martin & Servera and

[Menigo](). Many independent foodservice outlets purchase their products through one of these wholesalers. These wholesalers carry several U.S. products, including raisins, sauces, and marshmallows.

	2021	2022	2023	2024	2025
Full-Service Restaurants	7,616	9,558	10,331	10,670	10,981
Limited-Service Restaurants	3,301	3,797	4,101	4,262	4,431
Cafés/Bars	2,434	3,228	3,349	3,351	3,418
Self-Service Cafeterias	732	900	973	1,001	1,039
Street Stalls/Kiosks	143	163	174	176	179
Total	14,224	17,647	18,929	19,461	20,047

Source: Euromonitor

Food Processing Industry

The Swedish Food Federation, or Livsmedelsföretagen, reports that the Swedish food processing industry remains one of Sweden's largest manufacturing sectors, with a turnover of around $22 billion (SEK 200 billion). The sector comprises approximately 3,000 processing companies (of which 750 are members of the Swedish Food Federation), ranging from small firms to large multinational producers, and employs about 45,000 people, making it a key industrial employer in Sweden. Production is concentrated in core segments such as dairy, meat processing, bakery products, and beverages. For more, see the Swedish Food Federation website https://www.livsmedelsforetagen.se/in-english/.

Despite this solid domestic base, Sweden is dependent on imports, with agricultural and food imports totaling $29.6 billion in 2025, reflecting both limited domestic agricultural capacity and strong consumer demand for a wide product range. Last year, the top three largest imported product groups were seafood products ($6.7 billion), forest products ($2.9 billion) and dairy products ($1.9 billion). Norway, the Netherlands, Denmark, Germany, and Poland were Sweden's largest suppliers of agricultural products in 2025.

As of April 1, the Value Added Tax (VAT) on food and non-alcoholic beverages will be temporarily reduced from twelve to six percent. This measure is the Swedish government's direct response to rising food prices, which have been driven by the aftermath of the COVID-19 pandemic and the impact of Russia's invasion of Ukraine. Together, these events led to sharp increases in the cost of key inputs across the food supply chain, including raw materials, energy, fuel, transport, and packaging. In Sweden, these pressures were further intensified by the weak Swedish krona. Since a significant share of raw materials, inputs, and packaging is imported and traded in euros or U.S. dollars, the depreciation of the krona has made imports more expensive, adding to the overall rise in food prices.

Local Business Customs and Consumer Buying Habits
The Swedes speak English well and have a high level of education (master's or bachelor's degree). They are open and business-minded, straightforward, and do not like hierarchy. Swedish buyers like to be well informed about the product they are interested in, as well as its price point and background information about their (future) business partner. They can be quick decision makers while valuing long-term partnerships.

Half of the Swedish population lives in five metropolitan areas: Stockholm, Goteborg, Malmö, Uppsala, and Linköping, and there is a close density of shops in these areas. There are a few supermarkets generally within walking distance anywhere in the city, many with long opening hours. In addition to well-known A-brands, most supermarkets have their own private labels, often including both a high-end and a low budget brand. The Swedes spend about 13-14 percent of their disposable income on food and beverages. Fika is unique to Sweden because it is not just a coffee break, but a deeply ingrained social ritual that prioritizes slowing down, connecting with others, and balancing work with well-being.

Entry Strategy into the Swedish Market
Gaining a thorough understanding of the market, its players (buyers and users of U.S. products) is crucial in understanding the market and determining if there is a market for the product. Swedish buyers of U.S products can be both traders (specialized importers and distributors) as well as direct users (food processing companies).

Trade shows can serve as a springboard into the market to establish new trade contacts, and gauge product interests. U.S. exporters may consider exhibiting at one of the shows in the United States as Swedish buyers regularly travel around the world to see new products, make new contacts, and buy great products. Visiting (or exhibiting) at one of the following trade shows in Europe may be considered as well.

Leading Trade Shows in Europe	
SIAL, Paris, France Europe's largest food & beverages show (alternating with Anuga) **USDA Endorsed** sialparis.com	ANUGA, Cologne, Germany Europe's largest food & beverages show (alternating with SIAL) **USDA Endorsed** anuga.com
International Confectionary Fair (ISM), Cologne, Germany European confectionary show	PLMA World of Private Label, Amsterdam, the Netherlands World's largest private label show

ism-cologne.com	plmainternational.com
Fruit logistica, Berlin, Germany European produce and nuts show **USDA Endorsed** fruitlogistica.com	Fruit Attraction, Madrid, Spain European fresh produce show https://www.ifema.es/en/fruit-attraction
BioFach, Nuremberg, Germany European organic show **USDA Endorsed** biofach.de	Food Ingredients Europe, Frankfurt, Germany European food ingredients show **USDA Endorsed** foodingredientsglobal.com
ProWein, Dusseldorf, Germany Europe's largest wine show prowein.com	Nordic Organic Food Fair, Stockholm, Sweden Largest organic show in the Nordics nordicorganicexpo.com
Food Expo, Herning, Denmark Denmark's largest food show https://uk.foodexpo.dk/	UMAMI, Lillestrøm, Norway Norwegian food and beverages HRI show umamiarena.no
VinExpo, Paris, France Large wine show Wineparis-vinexpo.vinexposium-connect.com	

U.S. exporters can also contact USDA's Foreign Agricultural Service (FAS) in The Hague, the Netherlands, the U.S. State Regional Trade Groups (SRTG), a commodity Cooperator Group, and/or the National Association of State Departments of Agriculture to obtain additional market entry support. (Reverse) Trade Missions, which are often organized around trade shows in the United States or other industry trade events, have also proven to be an excellent platform for U.S. companies to meet with Swedish buyers.

SECTION III. IMPORT FOOD STANDARDS & REGULATIONS AND IMPORT PROCEDURES

Most, but not all, Swedish food legislation is harmonized at the EU level. However, imported products must meet existing Swedish requirements in cases where EU regulatory harmonization is not yet complete or is absent. Additional national measures or options exist for reserved names for certain foodstuffs, choice of language, precautionary allergen labeling, voluntary nutrition declaration, use of stickers, samples, voluntary non-GM labeling, alcohol free or light beers, special use foods, vegetarian and vegan products, packaging waste management, food contact materials, additives, enzymes, processing aids, fortified foods, food supplements, irradiated foodstuffs, and voluntary labeling of vegetarian or vegan products.

The 2025 EU Food and Agricultural Import Regulations and Standards provides an overview of the regulation standards as well as links to the required health certificates. It is recommended that U.S. exporters verify the full set of import requirements with their Swedish buyer. The buyer and local freight forwarder or customs agent are often in the best position to research such matters, advise U.S. exporters, and verify it with the Swedish Food Agency. The final approval of any U.S. product is subject to the Swedish rules and regulations as interpreted by border officials at the time of product entry. Additional information about importing food products from the United States into Sweden can be found here, https://www.livsmedelsverket.se/en/business-legislation-and-control/legislation-food-business/importing-food-products.

SECTION IV. MARKET SECTOR STRUCTURE AND TRENDS

In 2024, organic food sales in Sweden totaled SEK 30.9 billion, down from SEK 34.2 billion the previous year, and accounted for 6.7 percent of the total food retail market, with declines observed across all sales channels. For 2025, a further drop in sales is expected. Despite a smaller price gap between organic and conventional products in recent years, higher overall inflation has made price-sensitive consumers more likely to opt for cheaper options, putting continued pressure on organic sales. While the Krav label remains highly recognized among Swedish consumers, contributing to brand awareness and trust, the market faces challenges as demand softens and retail growth slows. According to industry sources, organic certified products are facing competition from products that are Från Sverige ("From Sweden") labeled which is gaining popularity among Swedish consumers. Additional information about the Swedish Organic Market can be found in the 2026 EU Organic Market Report.

The Swedish National Food Strategy, launched in 2017 and updated in 2025 as "Food Strategy 2.0," aims to boost domestic food production, strengthen the food sector, and encourage consumers to choose Swedish products. The policy has gained urgency due to food security concerns, supply-chain disruptions, support for rural jobs, and efforts to promote sustainability and national resilience amid Sweden's reliance on food imports.

Sweden promotes domestically produced food through several practical tools involving labels, public procurement, retail strategies, and marketing initiatives. These measures aim to strengthen local agriculture while informing consumers about the origin of food products. One of the most visible initiatives is the Från Sverige ("From Sweden") label, guaranteeing that the raw materials are grown, raised, and processed in Sweden. The label is widely used on meat, dairy, eggs, vegetables, cereals, and processed foods. Retailers actively promote these products with special marketing campaigns.

In addition to sustainability, consumers (often Millennials and Generation Z) seem to be willing to pay for authenticity. They want to hear or read about who produced a food product and what the story behind the product is. This desire for authenticity also applies to foodservice outlets. Hosts that have a story to tell about their restaurant, cafe, or bar appeal to today's consumers.

Swedish consumers show a strong interest in trying new food concepts and international cuisines, with trends like Taco Friday and increasing pasta consumption reflecting this curiosity. Outdoor cooking and barbecuing are popular in spring and summer, especially at country houses, where weekends are spent socializing around meals. At the same time, busier lifestyles mean many Swedes have less time for shopping and meal preparation, driving growing demand for convenient and affordable food products. Food and beverage choices are increasingly influenced not only by traditional media but also by online influencers, highlighting the importance of digital channels in shaping consumer behavior.

Best Products Prospects

Sweden is an interesting market for several high-value products. The market offers export potential for distilled spirits, RTD beverages, food preparations, sauces & condiments, almonds, raisins, bakery products, confectionery, and Alaska pollock. FAS/The Hague maintains a list of Swedish buyers of these products. Additional trade statistics can be found at http://apps.fas.usda.gov/gats/default.aspx.

Table 4: Sweden, Best High-Value Products Prospects, $1,000

Product	Total Imports, 2025	Imports from U.S., 2025 (U.S. market share)	Key Constraints Over Market Development	Market Attractiveness for USA
Wine (HS2204)	991,384	29,568 (3 percent)	French, Italian, and Spanish wines are popular. Popular new world wines come from South Africa, Chile, and Australia.	Sweden does not produce wines and therefore depends on imports. The Swedes are among the most affluent consumers in the world.
Food preparations (HS210690)	676,928	12,823 (2 percent)	Neighboring countries lead the supply of flavored or colored sugar, isoglucose, and lactose.	Food preparations are needed by Swedish food processing companies.
Sauces and condiments HS210390	230,975	21,354 (9 percent)	Imports are up and competition from other EU MS and Thailand is growing.	Swedes demand sauces, condiments, and seasoning due to its grilling/BBQ tradition.
Almonds (HS080212)	51,910	19,807 (38 percent)	Some competition from Spain for organic almonds.	Demand from bakeries and snack companies.
Dried grapes (HS080620)	27,361	11,079 (40 percent)	Some competition from Turkey and to a lesser extent South Africa and Chile.	Demand for branded packaged goods from retail and ingredients from food and snack companies.
Beer (HS2203)	148,438	4,279 (3 percent)	Competition from Czech Republic, Denmark, Germany, the Netherlands, and the U.K.	The Swedes love craft beer with funky labels, great tastes, and a good story.
Distilled spirits (HS2208)	241,039	7,311 (3 percent)	All, except the USA, are geographically close to Sweden and offer quality products.	Demand for branded, good quality, tasty, and unique products that have a story to tell.
Bakery products HS1905	774,498	3,026 (<1 percent)	All, except the USA, are geographically close to Sweden and offer good quality	Demand for good quality and unique products.

			products.	
Alaska pollock HS030475	14,031	2,071 (14 percent)	China is the leading supplier of Alaska pollock	Processors have demand Alaska pollock.
Chocolate and confectionery	815,954	2,583 (<1 percent)	Competition from other EU MS	Swedes like well-known branded chocolate and confectionery products.
Non-alcoholic beverages HS2202	599,831	901 (<1 percent)	Competition from other EU MS	Swedes like well-known branded and innovative beverages.

Source: Trade Data Monitor

Seafood
Fiskbranschen, www.fiskbranschen.com, also known as Sweden Seafood, is the umbrella organization representing Swedish seafood traders and processing companies. It operates under Livsmedelsföretagen, www.li.se, and includes around 175 member companies. While Sweden has its own fishing fleet, primarily targeting pelagic and demersal species, the country remains heavily dependent on imports to meet domestic demand and demand in foreign markets.

Today, approximately 75 percent of the Swedish seafood market consists of imported products, most of which originate from other EU countries. Although direct U.S. seafood exports to Sweden were estimated at $3.5 million in 2025, industry sources indicate that a larger volume of U.S. seafood ultimately reaches Swedish consumers through re-exports via countries like Denmark, Germany, Poland, and the Netherlands. The Swedish seafood processing industry relies heavily on imported Atlantic salmon and cod, largely sourced from neighboring Norway. These two species are also the most consumed species in Sweden.

Per capita seafood consumption in Sweden has declined slightly, mainly due to food inflation and rising living costs, as well as the relatively limited presence of seafood in ready meals and convenience products. Despite its recognized health benefits, seafood is often perceived as an expensive source of protein, while some consumers also lack familiarity with how to prepare it well. In retail, U.S. species such as Alaskan pollock, hake, and certain Alaskan flatfish are available, while higher-end restaurants may offer products like U.S. scallops, lobster meat, wild salmon, and roe.

Alcohol Monopoly Systembolaget
Direct sales of alcoholic beverages to consumers with more than 3.5 percent alcohol content are allowed by the alcohol monopoly, Systembolaget. Its stated goal is to reduce the harmful effects of alcohol. Systembolaget operates via 437 shops throughout Sweden and another 500 agents in smaller towns and rural areas which serve as pick-up-points. Specialized and licensed importers are responsible for the importation of alcoholic beverages for Systembolaget. Every three months Systembolaget's purchase department puts out a very specific Tender Request and importers are invited to present their best products. The steps to do so can be found on Systembolaget's website. Additional information about the purchase process of Sweden's alcohol monopoly Systembolaget, its different labeling and sustainability guidelines, can be found in Swedish Alcohol Purchasing Process - Overview of Systembolaget.

Distilled Spirits

Demand for well-known U.S. distilled spirits brands in Sweden has remained relatively stable, especially compared to wine, supported by the growing role of the on-trade sector, including bars, clubs, and restaurants. As more consumption takes place in these venues, a smaller share of spirits sales goes through Systembolaget compared to beer and wine. Premium spirits continue to perform strongly, reflecting ongoing premiumization trends and consumers' willingness to pay for quality and recognized brands. At the same time, the fastest-growing segments are no- and low-alcohol alternatives and ready-to-drink (RTD) alcoholic and non-alcoholic beverages. RTD beverages are pre-packaged, single-serve drinks designed for immediate consumption, including canned cocktails, hard seltzers, iced coffee, energy drinks, and functional teas. In response, distilled spirits companies are expanding into alcohol-free options, soft drinks, and canned cocktails to capture shifting consumer preferences. Domestic production is also becoming more relevant, supported by the Swedish policy focus on self-sufficiency and resilience, with new Swedish distilleries emerging in categories like gin, whisky, and vodka.

Wine

Sweden predominantly depends on imported wine, with slightly over half of all sales being red wine. Overall wine sales are declining, largely due to reduced red wine consumption, which has traditionally been the dominant category among Swedish consumers. U.S. wines were particularly affected in 2025, with sales dropping 23 percent compared to 2024, reducing market share from 5.5 to 4 percent, influenced in part by shifting consumer sentiment. Sustainability (environmental and social responsibility) and ethical certifications (Fair Trade and Fair for Life) are gaining attention at Systembolaget; however, relatively few wines carry these labels. In total, 413 are labeled as sustainable beverages, 86 are ethically certified, and nearly 3,000 wines are certified organic. Swedish consumers are willing to pay for quality, making the market attractive for wines from regions such as New York, Washington, Oregon, Virginia, and Idaho. In stores, Systembolaget offers wines in boxes, light glass, PET, and carton tetra packaging. Alcohol-free wines are growing in visibility in Systembolaget stores but still represent less than one percent of the market.

Beer

Beer produced in Sweden continues to dominate the market, reflecting both growing production and shifting consumer preferences toward domestic products. Although per capita beer consumption has been declining, Swedish consumers appear to be returning to lager, not only because it is generally more affordable than specialty or craft beers, but also because it typically has a lower alcohol content. This aligns with the broader trend towards low- and no-alcohol beverages. Specialty beers, including those from the United States, remain popular, largely due to their distinctive and recognizable flavors, although there is a growing trend to move some production of iconic American craft beers closer to the European consumer market. Packaging trends further illustrate evolving consumer habits, with approximately 85 percent of beer sold in Sweden now in cans, which better preserve quality, reduce costs, and improves efficiency in transportation.

SECTION V. AGRICULTURAL AND FOOD IMPORTS

Agricultural & Food Import Statistics:

Swedish imports of U.S. agricultural and food products can be downloaded from the FAS website. Navigate to the BICO Reports link and make the following selection: Product Type: exports; Market Year: calendar year; Report Type: year-to-date; Country: Sweden; Product: agricultural & related products and Download: word.

Table 4 in this report provides an overview of the best high value consumer-oriented products prospects.

SECTION VI. KEY CONTACTS AND FURTHER INFORMATION

If you are an interested U.S. party with questions or comments regarding this report, need assistance exporting to Sweden, or are seeking information on potential foreign buyers of consumer-oriented products and seafood products, please contact the Foreign Agricultural Service:

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Attachments:

No Attachments