



**MARKET ACCESS SECRETARIAT
Global Analysis Report**

Inside Sweden

The Fish and Seafood Trade

April 2015



TRADE SUMMARY*

In 2013, Sweden was the 9th-largest importer of fish and seafood from the world. Sweden imported fish and seafood from 105 countries and the top three suppliers were Norway with 83.8% market share, Denmark (6.5%) and China (1.3%).

Sweden imported US\$4.5 billion worth of fish and seafood from the world in 2013, an increase of 24.0% from 2012. Part of this increase was due to a significant growth in imports of fresh/chilled Atlantic and Danube salmon, total import value of US\$2.6 billion, fresh/chilled fillets of Pacific, Atlantic and Danube salmon (US\$424.9 million), and frozen fillets of Pacific, Atlantic and Danube salmon (US\$186.2 million).

Sweden represents a promising market for Canadian suppliers of fish and seafood products, but is also a competitor that supplied Canada's top five destinations: the United States, China, Thailand, Vietnam, and Chile in 2013.

*Numbers in this section came from Global Trade Atlas, (2015) and are based on Sweden's import data, unless otherwise specified.

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CANADIAN PERFORMANCE

Sweden was the 18th-largest destination of Canadian fish and seafood products in 2014. Canada exported US\$18.0 million (based on Canadian export data) worth of fish and seafood to Sweden, representing an increase of 71.0% from 2013. Part of this increase was due to a significant increase in exports of frozen cold-water shrimp and prawns (186.4%) and prepared/preserved shrimp and prawns not in airtight container (314.4%) (Global Trade Atlas, 2015).

In 2014, Sweden was the 62th-largest destination of Canadian agriculture and agri-food products, with fish and seafood being Canada's most significant export to Sweden. The leading fish and seafood products exported from Canada to Sweden were frozen cold-water shrimp and prawns (US\$ 7.6 million), prepared/preserved shrimp and prawns not in airtight container (US\$4.8 million), and frozen lobsters, including in shell (US\$2.4 million) (Global Trade Atlas, 2015).

BY THE NUMBERS

**Top Ten Suppliers of Fish and Seafood to Sweden
and Top Imported Products in 2013 (Based on Swedish Import Data)**

Rank	Country	Total Import Value (US\$)	Top Import Supplied	Top Import Value (US\$)
	World	\$4,482,063,457	Fresh/chilled Atlantic salmon and Danube salmon	\$2,587,755,320
1	Norway	\$3,755,774,576	Fresh/chilled Atlantic salmon and Danube salmon	\$2,580,565,835
2	Denmark	\$289,453,330	Frozen cold-water shrimp and prawns	\$81,696,619
3	China	\$57,112,620	Prepared/preserved crustaceans, NESOI*	\$23,722,290
4	Germany	\$54,663,937	Fresh/chilled fillets of Pacific, Atlantic, and Danube salmon	\$7,358,272
5	Netherlands	\$47,336,504	Frozen fillets of flat fish	\$7,404,767
6	Thailand	\$22,976,223	Prepared/preserved tunas/skipjack/bonito, not minced	\$18,096,470
7	United States	\$21,789,732	Prepared/preserved shrimp and prawns not in airtight container	\$6,741,006
8	Poland	\$21,528,041	Prepared/preserved shrimp and prawns not in airtight container	\$7,827,224
9	Morocco	\$19,247,164	Prepared/preserved shrimp and prawns not in airtight container	\$18,557,403
10	United Kingdom	\$18,479,565	Frozen fillets of Pacific, Atlantic and Danube salmon	\$3,763,821

Source: Global Trade Atlas, 2015.

*NESOI: Not Elsewhere Specified or Indicated



Top Ten Swedish Fish and Seafood Imports from the World in 2013

Rank	Product	Import Value (US\$)
1	Fresh/chilled Atlantic and Danube salmon	\$2,587,755,320
2	Fresh/chilled fillets of Pacific, Atlantic, and Danube salmon	\$424,864,798
3	Frozen fillets of Pacific, Atlantic and Danube salmon	\$186,187,310
4	Cod, dried, whether or not salted, but not smoked	\$131,911,692
5	Frozen cold-water shrimp and prawns	\$95,765,881
6	Cod, salted or in brine, not dried or smoked	\$85,058,040
7	Prepared/preserved shrimp and prawns not in airtight container	\$79,686,614
8	Fresh/chilled cod	\$74,605,868
9	Prepared/preserved shrimp and prawns in airtight container	\$68,260,871
10	Frozen fillets of cod	\$54,624,406

Source: Global Trade Atlas, 2015.

RETAIL SALES

Retail sales of processed fish and seafood grew from 2009 to 2013 with a compound annual growth rate (CAGR) of 2.8%. The three main categories of processed fish and seafood products retailed in Sweden were: frozen fish and seafood representing 44.3% of the total; canned fish and seafood (32.0%); and chilled fish and seafood (18.2%).

Overall, during the period of 2009-2013 frozen fish and seafood was the best performing category with a CAGR of 4.3%, followed by canned fish and seafood (2.1%), and chilled fish and seafood (0.5%). The fastest growing subcategory was frozen raw fish with a CAGR of 5.1%.

Sales of processed fish and seafood are expected to further increase during the forecasted period of 2014-2018 with a CAGR of 3.0%. Canned fish and seafood is expected to be the best performer with a CAGR of 3.0%, followed by frozen fish and seafood (2.6%), and chilled fish and seafood (2.1%). Tuna is expected to be the fastest growing subcategory within processed fish and seafood with a CAGR of 4.4%.

Sweden's Processed Fish and Seafood* Retail Value Sales (Historic/Forecast) in US\$ Millions and Period Growth (%)

Category	2009	2013	2014 ^F	2018 ^F	CAGR % 2009-13	CAGR % 2014-18 ^F
Total Fish and Seafood	1384.5	1547.5	1583	1781.8	2.8	3.0
Frozen fish/seafood	580.9	686.3	698.7	775.3	4.3	2.6
Raw fish	369.3	450.5	459.3	528.3	5.1	3.6
Raw seafood	138.6	155.9	157.1	154.5	3.0	-0.4
Coated fish/seafood	70.0	76.6	78.8	88.7	2.3	3.0
Other fish/seafood	3.1	3.4	3.4	3.9	2.3	3.5
Canned fish/seafood	455.0	494.1	508.1	571.4	2.1	3.0
Other canned fish/seafood	384.3	417.3	428.7	478.6	2.1	2.8
Tuna	55.8	60.7	62.9	74.7	2.1	4.4
Mackerel	11.7	12.6	12.8	13.8	1.9	1.9
Salmon	3.2	3.5	3.6	4.3	2.3	4.5
Chilled fish/seafood	276.3	281.7	285.6	310.2	0.5	2.1
Raw fish	186.0	183.4	184.3	192.2	-0.4	1.1
Raw seafood	76.4	83.5	86.2	101.1	2.3	4.1
Coated fish/seafood	14	14.8	15.1	16.9	1.4	2.9

Source: Datamonitor, 2015

*Fish-based ready meals have been excluded from this analysis, given the fact that they represent a small market



TOP TEN FISH AND SEAFOOD SUPPLIERS TO SWEDEN IN 2013

The figures listed below are in United States dollars.

<p><u>1. Imports from Norway</u></p> <p>Fresh/chilled Atlantic salmon and Danube salmon \$2.6B</p> <p>Fresh/chilled fillets of Pacific, Atlantic, and Danube salmon \$406.0M</p> <p>Frozen fillets of Pacific, Atlantic and Danube salmon \$157.6M</p> <p>Cod, dried, whether or not salted, but not smoked \$127M</p> <p>Cod, salted or in brine, not dried or smoked \$83.5M</p>	<p><u>2 Imports from Denmark</u></p> <p>Frozen cold-water shrimp and prawns \$81.7M</p> <p>Prepared/preserved shrimp and prawns in airtight container \$32.8M</p> <p>Prepared/preserved shrimp and prawns not in airtight container \$21.4M</p> <p>Shrimp and prawns, not frozen except cold-water \$10.6M</p> <p>Fresh/chilled fillets of Pacific, Atlantic, and Danube Salmon \$10.2M</p>
<p><u>3. Imports from China</u></p> <p>Prepared/preserved crustaceans, NESOI* \$23.7M</p> <p>Frozen fillets of cod \$13.8M</p> <p>Frozen fillets of coalfish \$6.9M</p> <p>Frozen fillets of Pacific, Atlantic and Danube salmon \$2.0M</p> <p>Frozen fillets of Alaska Pollock \$1.9M</p>	<p><u>4. Imports from Germany</u></p> <p>Fresh/chilled fillets of Pacific, Atlantic, Danube salmon \$7.4M</p> <p>Prepared/preserved fish, whole or in pieces NESOI* \$6.3M</p> <p>Prepared/preserved mackerel, not minced \$6.1M</p> <p>Fresh/chilled cod \$5.1M</p> <p>Frozen fillets of Pacific, Atlantic and Danube salmon \$4.0M</p>
<p><u>5. Imports from the Netherlands</u></p> <p>Frozen fillets of flat fish \$7.4M</p> <p>Prepared/preserved fish, whole or in pieces, NESOI* \$4.7M</p> <p>Frozen fillets of cod \$3.9M</p> <p>Prepared/preserved fish, NESOI* \$1.9M</p> <p>Fresh/ chilled fillets of flat fish \$1.4M</p>	<p><u>6. Imports from Thailand</u></p> <p>Prepared/preserved tunas/skipjack/bonito, not minced \$18.1M</p> <p>Prepared/preserved fish, NESOI* \$3.0M</p> <p>Prepared/preserved shrimp and prawns not in airtight container \$0.6M</p> <p>Prepared/preserved shrimp and prawns in airtight container \$0.4M</p> <p>Extracts of meat, fish, crustaceans, etc. \$0.2M</p>
<p><u>7. Imports from the United States</u></p> <p>Prepared/preserved shrimp and prawns not in airtight container \$6.7M</p> <p>Frozen fillets of Alaska Pollock \$5.4M</p> <p>Live, fresh/chilled, dried, salted or in brine lobsters \$3.4M</p> <p>caviar substitutes prepared from fish eggs \$2.8M</p> <p>Frozen Pacific salmon, NESOI* \$0.8M</p>	<p><u>8. Imports from Poland</u></p> <p>Prepared/preserved shrimp and prawns not in airtight container \$7.8M</p> <p>Fresh/chilled sardines, sardinella, and brislings/sprats \$3.5M</p> <p>Prepared/preserved herring whole or in pieces \$2.1M</p> <p>Smoked Pacific, Atlantic and Danube salmon \$2.0M</p> <p>Frozen fillets of Pacific, Atlantic and Danube salmon \$1.6M</p>
<p><u>9. Imports from Morocco</u></p> <p>Prepared/preserved shrimp and prawns not in airtight container \$18.6M</p> <p>Prepared/preserved sardines/sardinella/brisling/sprats, not minced \$0.7M</p>	<p><u>10. Imports from the United Kingdom</u></p> <p>Frozen fillets of Pacific, Atlantic and Danube salmon \$3.8M</p> <p>Frozen fillets of fish, NESOI* \$2.9M</p> <p>Prepared/preserved fish, whole or in pieces NESOI* \$2.6M</p> <p>Fish-liver oils and fractions not chemically modified \$1.8M</p> <p>Fresh/chilled fillets of Pacific, Atlantic, and Danube salmon \$1.1M</p>

Source: Global Trade Atlas, 2015

*NESOI: Not Elsewhere Specified or Indicated



FOR MORE INFORMATION

International Trade Commissioners can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions and local business contacts, and are an excellent point of contact for export advice.

- **Overview of Trade Commissioner Services in Sweden**
<http://www.tradecommissioner.gc.ca/eng/contact-our-team.jsp?oid=109&cid=11H>
- **Find a Trade Commissioner**
www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp

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- ats-sea.agr.gc.ca

For additional information on Seafood Expo Global 2015, please contact:

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RESOURCES

Datamonitor - Market Data Analytics, 2015

Global Trade Atlas, 2015



Inside Sweden: The Fish and Seafood Trade

Global Analysis Report

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