

# Fact Sheet: Swedish Market for Edible Nuts

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## Market Size

Sweden is situated in Northern Europe and has a population of 9.5 million people. The average annual consumption of edible nuts<sup>1</sup> in Sweden in 2010 was about 1.8 kg per capita. The total consumption in 2010 was about 17,809 tonnes. These figures have been more or less stable the last five years.

## Market Characteristics

By tradition Swedes eat a lot of nuts before and around Christmas as it is part of the traditional Christmas table. This is the time of the year when sales of edible nuts reach its peak, especially walnuts and hazelnuts. But the food market has for a number of years been influenced by consumer awareness of health, environmental, and social issues. This has led to increased demand in healthy food-stuffs. Edible nuts are considered to be healthy and sales of products that are regarded as nutritious have expanded.

Diets like the Low-Glycemic Index (GI) diet and LCHF are popular by many Swedes. Edible nuts are low in saturated fats and have a low GI, which make them ideal to include in your diet. In addition they contain many essential minerals and vitamins. Health Magazines applaud the positive effect of nuts and advocate nuts for better health, stronger immune system and protection against diseases. Edible nuts are considered to be the ultimate healthy snack.

Furthermore, there is an on-going debate in the media on E-numbers and additives in the food industry. People like to know the origin and the content of what they put in their mouth. If the nuts are organic and FairTrade it might be an advantage in the eye of the consumer. In Sweden the market for organic and FairTrade has been growing considerably for several years.

According to the Centre for the Promotion of Imports from Developing Countries (CBI)<sup>2</sup>, the most commonly consumed snack nuts in Europe are peanuts, almonds, cashews, macadamias, walnuts, hazelnuts, pistachios, pecans and brazil nuts. Among Swedish consumers the peanut is the most popular edible nut, followed by the cashew. A very popular product in Sweden is the nut mix, a perfect snack.

## Domestic Production and Exports

The production of edible nuts in Sweden in 2010 is almost non-existing due to the cold climate. But there are some re-export, mostly to the neighboring countries. In 2010 the export was 957 tonnes at a value of 32.1 million SEK.

## Imports

In 2010, the total imports of edible nuts to Sweden amounted to 17,809 tonnes. The biggest export came from USA (3,690 tonnes) followed by the Netherlands, Germany, the Philippines, Argentine, Denmark and China. Some of the nuts coming from other countries in Europe are likely to originate from developing countries, but it is difficult to say how large this share is.

### Nuts Export from Sweden

Year	Tonnes	SEK
2006	12,848	504,351
2007	15,642	529,825
2008	17,804	592,430
2009	16,683	543,170
2010	17,809	616,009

Source: Statistics Sweden (SCB)

## Market Segments

The EU-market for edible nuts can be divided into two broad segments: the food industry and the end-consumers according to CBI .

Most of the edible nuts in the EU are used by the food processing industry and it is the same for Sweden. Within the food industry, confectioners are the largest industrial users of edible nuts. Edible nuts are also common to use in the bakeries and the breakfast cereal industry and when making, for example, ice-cream.

The end-consumer segment is dominated by private label products in Sweden. Super markets and the food service sector (hotels, restaurants and catering establishments) dominate the sale. Some of the edible nuts are sold in retail pack. The packing and processing is done in Europe.

<sup>1</sup> Edible nuts are in this fact sheet defined as 0801, 0802 and 1202 in the Combined Nomenclature

<sup>2</sup> "Trends and segments for edible nuts", Preseved fruit and vegetables and edible nuts, CBI Market Intelligence 2011, CBI.

## Distribution Channels

The Swedish food-retailing sector is highly concentrated. Four trade groups, ICA, Coop, Axfood and Bergendahls, with both retail and wholesale activities, dominate the Swedish distribution of food to the retail sector. These four trade groups account for about 75% of the total retail market for foodstuffs and other everyday commodities. There are also several independent producers like for example OLW, Estrella, Exotic Snacks and Parrots. A few import directly but most buy via intermediaries in Europe

## Market Access

Some of the edible nuts to Sweden from countries outside the EU are subject to an import tariff others are not (highest import tariff is 5.6%), some examples are given in table below (November 2011). Products from ACP and Least Developed Countries are exempted from duty.

### Nuts Import

Item	Import tariff
Almonds	5.6%
Brazil nuts	0%
Hazelnuts	3.2%
Macadamia	2 %
Walnuts	4%

Source: Statistics Sweden (SCB)

Due to food safety there are some restrictions on import of certain nuts from certain countries. Brazil nuts with shells and peanuts are subjected to controls of possible findings of aflatoxins for example. For importers of edible nuts it is advisable to check with Swedish National Food Administration.

## Market Prospects

Compared to other consumption, the food consumption is not so sensitive to changes in prices and income. Even though private consumption has become more modest during the first quarter of 2011 according to Statistics Sweden (SCB) the positive trend for organic, fair trade, healthy or ethnic products within the food sector is expected to maintain over the next few years.

Sales have increased significantly for these products recently even though the total food sector is estimated to show a more modest development. The import of edible nuts will probably rise a few more years but it is difficult to tell how the development of the raw material prices will affect the consumption. It is expected that cheaper nuts like peanuts will take market shares.

## More information

**National Food Administration (food safety, food regulations) – [www.slv.se](http://www.slv.se)**

**Swedish Board of Agriculture (agricultural issues, food consumption statistics) – [www.jordbruksverket.se](http://www.jordbruksverket.se)**

**Open Trade Gate Sweden (trade rules and requirements) – [www.opentradegate.se](http://www.opentradegate.se)**

**Statistics Sweden – [www.scb.se](http://www.scb.se)**

**Swedish Customs – [www.tullverket.se](http://www.tullverket.se)**

**Ica Group – [www.ica.se](http://www.ica.se)**

**Coop Group – [www.coop.se](http://www.coop.se)**

**Axfood – [www.axfood.se](http://www.axfood.se)**

**OLW - [www.olw.se](http://www.olw.se)**

**Estrella - [www.estrella.se](http://www.estrella.se)**

**Parrots - [www.parrots.se](http://www.parrots.se)**

**Exotic Snacks - [www.exoticsnacks.se](http://www.exoticsnacks.se)**

## Exchange Rate

1 USD = 6.61SEK (Nov. 2011)

## Contact Us

**Swedish Chambers of Commerce  
Trade Promotion**

**PO Box 160 50**

**103 21 Stockholm, Sweden**

**Phone: +46 (0)8 555 100 00**

**Fax: +46 (0)8 566 316 30**

**[www.swedishchambers.se](http://www.swedishchambers.se)**

**[www.chambertrade.com](http://www.chambertrade.com)**

**E-mail: [info@chambertrade.com](mailto:info@chambertrade.com)**

## Quick Facts

**Business language:** Swedish, English

**Summer holiday months:** June-August

**Other holidays:** Christmas, New Year's Eve, Easter, National Day (6 June), Midsummer Eve (first Friday between 19 and 25 June)

**Average monthly wage (2009):** ca. 3,000 EURO

**Religion:** The Church of Sweden is Evangelical Lutheran, but there are many other religions