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# Finland

# Exporter Guide

# Annual

# 2003

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**Report Highlights:**
The consolidation and restructuring of the Nordic food retail sector offers new interesting opportunities in terms of volumes and diversity of products being demanded. Best products prospects include fish and seafood and convenience food and food and beverages which appeal to the health conscious. Additionally, the market is expanding for international and ethnic cuisine, including foods that are uniquely associated with the various regions of America. Major current impediments to U.S. sales include consumer resistance to products which contain genetically modified (GMO) ingredients. The strong dollar, which has also been a major impediment, has weakened considerably.

Includes PSD Changes: No
Includes Trade Matrix: No
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Stockholm [SW1]
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## SECTION I. MARKET OVERVIEW

### SWEDEN AND FINLAND

Sweden and Finland, with populations of 8.9 and 5.2 million people respectively, are countries with very high living standards. In 2002, Sweden's GDP growth was estimated at 1.5 percent and Finland's 2.2 percent. Both Sweden and Finland are members of the European Union (EU). In January 2002, Finland joined the European Monetary Union (EMU) and switched from the Finnish Mark to the Euro. As a result of the September 2003 referendum on whether or not to join the EMU, Sweden decided to stand outside and keep the Swedish Krona for the time being.

Due to the severe Nordic winters and relatively short growing season, Sweden and Finland rely heavily on imported food and agricultural products. In 2002, imports of agricultural, fish and forestry products totaled US$ 6,375 million for Sweden and US$ 2,910 for Finland. The demand for high-value, consumer-ready products remains strong in the two countries. Swedish food retail sales rose by 4.6 % over the one-year period ending in December 2002 to SEK 142 billion (about USD 14.6 billion). The increase in consumption reflected a 3.4% rise in value, and a 1.2% gain in volume. The capita food expenditure was US$ 1,634 and food and beverages accounted for 12.1 percent of the Swede's total expenses.

The Swedish and Finnish markets for food and beverages are very sophisticated. Large supermarkets and hypermarkets accounts for about 75 percent of the Swedish retail food sales. There were 6,060 food retail outlets in Sweden in 2002 compared to 13,000 in 1970. In Finland, the 360 largest stores accounted for half of total retail food sales of USD 8.8 billion in 2000. In Finland, there were 4,283 outlets as of January 1st 2001, which were 228 outlets less than the previous year.

| Advantages | Challenges |
|---|---|
| Sophisticated market. High acceptance of new products and concepts. U.S. products are considered high quality and trendy. | U.S. products are at a price disadvantage compared to competitors based in the European Union. |
| Growing consumer demands for value-added products, convenience foods and functional foods. Proliferation of "healthy" and "greener" foods. | Strong hesitations with respect to genetically modified products and no access for hormone treated beef from the U.S. |
| Location gives access to a Nordic/Baltic market comprising 25 million consumers. | High distribution and shipping costs. |
| High standard of living, well educated workforce, growing incomes. English is widely spoken. | Strong dollar negatively affects U.S. sales, but the dollar has in recent months weakened considerably. |

## SECTION II. EXPORTER BUSINESS TIPS

### Local Business Practices and Customs

Swedish and Finnish firms do not change suppliers readily, and many commercial relationships have been built up and maintained over decades. While this is beneficial to exporters who have a partner, newcomers must be willing to invest effort in developing an entry into these markets and securing the confidence of commercial buyers. A Swedish or Finnish buyer will expect total commitment to prompt deliveries, precision in filling of orders and high quality for all kinds of products. Being punctual is not only regarded as a sign of respect, but also efficiency. Swedish or Finnish businessmen will have little understanding for cultural variation in punctuality.

**Market entry strategies for U.S. food products should include:**

1) Market research in order to assess product opportunities.
2) Advance calculation of the landed cost of a product in order to make price comparisons vis-a-vis competitors.
3) Locating an experienced distributor or independent reliable agent with strategic distribution channels to advise on import duties, sanitary regulations, and labeling requirements. It is advisable to initiate personal contact in order to discuss marketing matters such as funding for advertising, slotting allowance, in-store promotions and tasting events. Suppliers may also want to consider trade fair participation to raise awareness of their products.
4) Exploration of the purchasing arrangements of the larger retail chains.
5) Consider using USDA's Supplier Credit Guarantee program to make credit terms more attractive to importers.

**General Consumer Tastes and Preferences**

**Convenience:** The Swedes and the Finns are embracing value-added products and convenience foods. In-store eating and take-away is growing. As time is increasingly becoming a commodity that is in short supply, this affects food retailing to a high degree. Changes in lifestyle are also having a significant effect on the catering sector of the market. Both in Sweden and Finland about 20 percent of meals are currently eaten outside of the home. Fast food establishments are benefiting most from these trends, and are now becoming part of the traditional restaurant sector.

**Health:** There is a growing demand for "natural" (organic) and "healthy" food and drink products. The environmental or "green" philosophy that is a considerable factor in these markets, plays itself out in the food and beverage market. Consumers, in Sweden in particular, are willing and able to pay higher prices for food and drink products that are perceived to meet their environmental and health concerns.

**Organic:** Consumer interest in organic food products has been increasing more rapidly in Sweden than in Finland, but the trend is up in both countries. The growing demand for healthier, "greener" and more convenient products, is one of the major driving forces behind the evolution of the food industry. However, organic and health oriented-products still have a relatively small market share. The variety of processed organic products available is still much more limited than that found in the United States.

**Vegetarian:** The trend towards vegetarian choices is a growing one. More processed products which link convenience to the vegetarian alternative are appearing in retail outlets but are still limited in variety.

**Ethnic Foods:** Swedish and Finnish consumers are moving away from their culinary traditions as they become more open to new and exotic cuisine. A growing immigrant population (mainly in Sweden) and extensive travel abroad are the main reasons behind this trend.

**Food Standards and Regulations**

Sweden and Finland have been members of the European Union since 1995 and have adopted EU practices related to imports of agricultural products. Agricultural products are subject to the standard EU import licensing system, quotas, import duties and other provisions. It is important to note that these markets are fully open to competitors within the EU, while U.S. exporters face EU import restrictions.

- In general, the Swedish and Finnish governments conform to EU regulations.

- Food safety standards in these markets are very strict and imported foodstuffs must meet particular requirements.

- In negotiations with the EU, Sweden and Finland maintained the right to continue the application of some of their own food safety standards (which are in most respects tougher than those of the EU) for a transitional period after membership. For example, in the meat and livestock areas, Sweden and Finland maintain what is essentially a zero tolerance for salmonella. Moreover, these countries obtained transitional authority to maintain their own border inspection controls for salmonella for an unspecified length of time.

For more information, please refer to EU FAIRS Report (E20145) on the Foreign Agricultural Service web page at http://www.fas.usda.gov.

**Import and Inspection Procedures**

Sweden and Finland have exacting labeling requirements for foods and strict sanitary and phytosanitary requirements. Laboratories have sophisticated capabilities to monitor product quality. Detailed regulations apply to the importation of agricultural products into these markets. It is therefore most important that the U.S. exporter work closely with the importer to make sure that the products destined for these markets are in full conformity with these countries' food safety, quality and labeling rules and regulations.

General Import Regulations- Sweden and Finland

- Foodstuffs can only be brought in commercially to the country through an importer registered by the National Food Administration in each country (Livsmedelsverket in Sweden and Elintarvikevirasto in Finland).
- All foodstuffs sold in these markets must be labeled in Swedish and Finnish, respectively.
- Imported foodstuffs may not contain certain types of additives, which are not allowed in these countries.

A retail-size food package must show:
- The name of the manufacturer, packer or importer,
- The commercial name of the product, net metric weights or volume,
- Ingredients in descending order of weight,
- "Best before" date for consumption, and
- Storage instructions if perishable or intended for infants.

Importers should be consulted for proper labeling information. (Note: Many retail products intended for wide distribution in the region are labeled in multiple languages such as Swedish, Norwegian, Danish, Finnish and English.)

The documents required from the exporter include:

- A commercial invoice
- A bill of lading, and such special certifications as may be necessary.
- Sanitary or phytosanitary certificates, which must show the country of origin, are required for certain animals and plant products.
- The sanitary certification of origin must be certified by an official authority in the country of production or export.
- Sweden applies maximum residue levels established by the EU. For chemicals not registered by the EU, Sweden sets its own levels.
- The Swedish National Food Administration (NFA) oversees the control of pesticide residues in fruit, vegetables and cereals. Samples are collected at ports of entry or wholesale markets. The NFA also oversees the control of veterinary drug residues in foods of animal origin, mainly meat. Samples of imported meat are collected at ports of entry.

## SECTION III. MARKET SECTOR STRUCTURE AND TRENDS

### Food Wholesale and Retail Sector

A Nordic concentration and integration can clearly be seen as new mergers between the Nordic retailers are being implemented. At the same time a comprehensive process of consolidation and cross-border acquisitions is taking place among the European retailers. The Nordic countries are increasingly becoming part of the European retail market. Foreign companies and chains are expressing an increased interest in the Nordic market as globalization is accelerating.

In both Sweden and Finland, the three largest import/wholesale groups in each country cover over 70% of their markets. Significant changes have affected the retail food market in Sweden and Finland over the past few years. In both countries, the general discount stores, hypermarkets and large supermarkets are increasing in sales volume, while small and medium-sized stores lag behind. Elements of the restructuring of the sector include the on-going move toward vertical integration, the increasingly common use of exclusive contracts, consolidation of purchasing and deliveries and the growth of private labels. Supermarkets are responding to demands for an ever-widening list of products and product formats.

The wholesale and retail food market in Sweden is dominated by three groups, ICA, COOP and Axfood AB, which together account for over 70 percent of the commodity retail market.

In Finland, a few central retail organizations, (K-Group, S-Group, Tradeka/Elanto, Spar Group, Wihuri and Stockmann/Sesto) together dominate the retail food sector with an aggregate market share of nearly 95%. They also handle non-food products and specialties trading. In addition, almost one-third of the total wholesale trade in Finland goes through these organizations.

**Distribution:** The Nordic chains have closely knit wholesale and retail arrangements comprising a compact and efficient goods delivery system and a nationwide network of retail shops as well as department stores and supermarkets. Some also have hotel, restaurant, and catering services. The centralized system provides the economies of scale, which make distribution and imports in larger quantities possible.

**Independent importers and distributors:** There are a number of importers and distributors in Sweden and Finland specialized in certain product segments, such as organic products or ethnic foods. These importers/distributors in turn sell to the large retail chains in the markets. These importers are ideal for exporters who do not feel that they can meet the volume requirements of the large retailers when dealing with them directly. Some of these importers also supply the Hotel Restaurant and Institutional (HRI) sector.

**Alcoholic Beverages:** In Sweden, government-owned Systembolaget retains a monopoly on retail sales of all wines, spirits, and strong beers. As a result of accession to the EU, Vin & Sprit, lost its monopoly control of import and wholesale distribution channels, and is now working as a licensed importer along with 150 other independent licensed importers of wine and liquor. Also, restaurants may buy from importers or import directly provided that they have a license. Recently, Systembolaget introduced more liberal opening hours for its retail outlets and has added self-service shops and Saturday opening hours in response to public demand.

Finnish Alko, which has dominated the spirits, wine, beer, vinegar, and food starch industries, has lost many of its monopoly privileges to EU agreements. According to the current Finnish legislation, grocery shops are allowed to sell brewed beverages with a maximum alcohol content of 4.7 percent. There has been a long debate in Finland over putting ordinary-strength wines into food shops. Imports and production of alcoholic beverages are now open to licensed independent companies, whereas the sale of alcoholic beverages remains government controlled by Alko shops, but thus-far no change in this regard has been effected. Restaurants import alcoholic beverages through their own channels. Finland has been justifying the retention of its alcohol monopoly based on health and social concerns.

**Trends**

**Store size:** Smaller stores continue to lose market share to the larger supermarkets and hypermarkets.

**Discount stores:** Recently, there has been a dramatic increase of low-price food stores in both Sweden and Finland. The large Nordic retail chains have developed discount store concepts in order to meet the increased competition from European discount chains such as German Lidl and Danish Netto, which have recently established in these markets.

**Private Label:** The retailers are aggressively promoting their own private label brands through TV commercials and newspaper ads. Two of the largest Swedish retailers have set a goal of 15 percent market share in each product segment for their private label products by 2005. This is especially true for far-away-imported products. For some categories in the retail stores the figure is 50 percent. This development spells good potential for suppliers with private label capacities.

**Convenience shopping:** As the consumers increasingly eat outside their homes, the large retailers find themselves not only to be competing with each other, but also with the HRI sector. To face this new competitor, the supermarkets have developed deli like sections in their stores with either ready-to-eat food products or half-cooked dishes. Menu suggestions next to the food products are also popular. The display of products has also become more consumer-oriented. For example, dressings and bread croutons can be found next to the pre-mixed salads, and coffee cakes may be placed next to the coffee section. Manufacturers with the capability to supply convenience foods may find interesting opportunities in these markets.

**Promotions/Marketing:** Direct marketing in the form of "news paper format advertisements" is one of the most regularly used forms of communication in the Swedish and Finnish retail markets, and almost all the retail groups use this method as a means of conveying information to consumers. These are sent on a weekly basis to all the households in the immediate marketing area of the individual stores. The retailers also invest in advertising, primarily through the newspapers, while the producers and manufacturers spend most of their budgets on television advertising. The retail chains are also promoting their own private label products aggressively through TV commercials and advertisements.

**Internet sales:** Even though the computer/IT penetration in the Nordic countries is exceptionally high, retail food sales on the web have been very limited. The positive outlook that the large retailers had a few years ago regarding selling via Internet has changed. Retail chains Coop, Axfood and Bergendahls all recently terminated their Internet grocery web sites due to few customers and low profitability. Recently, ICA followed suit by closing down their Internet services. In Finland, the situation is very much the same.

Please see the most recent Retail report for Sweden and Finland for further information regarding the retail sector in these markets.

**Hotel, Restaurant, and Institutional (HRI) Food Service**

Of total food consumption in Sweden and Finland, the HRI sector accounts for about 20 percent. In Sweden, this sector consists of about 37,000 units, of which 10,000 are coffee shops, restaurants, fast food outlets and hotels and 27,000 are institutional kitchens at schools, kindergartens, nursing homes, hospitals, etc. Fast food outlets often belong to national and international chains, while restaurants and cafes' are most frequently family businesses. There are, however, some large international restaurant chains operating (e.g. TGI Friday's, Hard Rock Cafe, etc.) in these markets. Institutions are mainly operated by municipalities, counties or government agencies.

**Distribution:** The distribution to the HRI sector is dominated by a few large wholesalers, specialized in supplying this sector.

In 2002, the total turnover for the hotel and restaurant industry in Sweden was about SEK 58 billion (approximately USD 6 billion), of which restaurants accounted for USD 3.9 billion, and hotels for some USD 2.1 billion. This is an increase of USD 1.2 billion since the mid-1990's. Institutional food sales accounted for about USD 720 million in 2000. In Finland, the hotel and restaurant sector brought in roughly USD 4.9 billion in total sales in 2001, an increase of 3.8% compared to 2000.

Changes in lifestyles and tastes are having significant effects on the catering sector of the market. Fast food is the area benefitting most from these trends, and fast food outlets are now starting to become part of the traditional restaurant sector. From 1993-2002 the number of restaurant businesses in Sweden has increased by around 4,000 outlets from 13,600 to about 17,600. At the same time, the number of stores in the retail sector has been decreasing.

**Trends**:
- Outside the home, restaurants continue to attract a significant proportion of consumers.
- American trends remain popular in Sweden and Finland.
- The popularity of more informal, less expensive "fast food" outlets continues. McDonald's, Burger King, and Pizza Hut all have strong positions in these markets.
- Other U.S. chains such as Subway and TGI Friday's and Hard Rock Cafe can be found in Sweden.

- There are opportunities for U.S. fast food restaurant and coffee shop chains in these markets.

For further information about the Swedish and Finnish HRI sectors, please see the most recent HRI sector reports for these markets.

**Food Processing**

The small population bases of Sweden and Finland provide somewhat limited foundations for a highly diversified food processing industry with sufficient economies of scale. Consequently, there have been consolidations of several companies and an increasing emphasis on exports of processed food items - especially of cheeses, candies, snack foods and various jams and preserves. Since their EU membership, there has been a move toward mutual investment and consolidation among Finnish and Swedish food industries and joint Nordic cooperation in general. Several Finnish companies own and operate food manufacturing firms abroad.

**FINLAND -** The food processing industry is the fourth largest branch of Finland's industry. In 2002, the value of Finnish food exports was approximately EUR 991 million and the value of food imports EUR 2,098 million. The gross value of production was FIM 47 billion and the value added FIM 10 billion. The main sectors of the industry are meat processing, dairy and bakery. The food industry employs more than 38,000 people.

The Finnish food industry's primary market is the domestic market and the market share of Finnish food products in Finland is 85 percent. However, with the EU membership in 1995, Finland had to eliminate its import licensing system. This opened Finland's food industry to more competition from other EU member countries, which in turn, has forced changes in the form of mergers and acquisitions, as well as international expansion. This includes the Finnish baking industry (primarily Fazer Oy), which has expanded into Sweden, as well as the Baltics (particularly Estonia). The dairy industry (Valio), is also exporting to Sweden and the Baltics.

In 2002, imports of foodstuffs to Finland from the U.S. accounted for 2.0 percent, while the EU countries had a combined share of 71.1 percent. The industry processes domestic agricultural products and imported raw materials. However, 85 percent of the raw material used by the Finnish food industry is domestic.

Major companies dominate certain sectors such as Fazer (chocolate and bakery products), Cultor (sugar and grain), Raisio (margarine, starch, and bakery products), Hartwall (soft drinks, beer), Marli (liquors, fruit juices), Valio (dairy), etc. to give several examples.

**SWEDEN-** The food processing industry in Sweden is large-scale and dominated by a few large private and cooperatively owned companies. Five large suppliers account for about 50 percent of the retail food stores' purchases. One or two suppliers can have close to 100 percent of the market within some food segments. Farm cooperatives are powerful in Sweden's food industry. They have a virtual monopoly on domestically produced dairy products and are market leaders in the meat, milling, and bakery sectors. However, the majority of the food industry companies are privately owned. These companies are active in the brewing, prepared fish, frozen foods, sugar, and tobacco sectors. The domestic food processing industry accounts for 80 percent of the food consumed within Sweden, which makes this an important sector for suppliers of inputs. The food processors either source their raw materials or ingredients directly from their suppliers or through wholesalers.

In 2002, imports of foodstuffs to Sweden totaled SEK 51.6 billion, an increase by 8 percent from 2001. Imports from the U.S. accounted for SEK 916. Sweden's export of foodstuffs totaled SEK 26.7 billion.

Imports to the food processing sector includes vegetables, fruit, juice, coffee, and cocoa as well as fish and seafood. About 40 percent of all imports are products which cannot be grown in Sweden. Companies, which dominate within their sectors' are: Arla Foods (Dairy), Swedish Meats (Meat processing), Paagens (bakery), Cerealia (Milling and bakery), Findus (Fish processing), Löfbergs Lila (Coffee roasting).

## SECTION IV. BEST HIGH-VALUE PRODUCT PROSPECTS

- Candies
- Dried Fruit
- Fresh Fruit
- Frozen Vegetables
- Nuts
- Pet food
- Processed Fruits & Vegetables
- Rice and Rice Mixes
- Fish and Seafood
- Snack Foods
- Wines
- Pancake/Cake mixes
- Ethnic Foods
- Sauces
- Convenience Foods/Meals
- Vegetarian processed products
- Organic products
- Authentic barbeque sauces and seasonings

## SECTION V. KEY CONTACTS AND FURTHER INFORMATION

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**FINLAND**

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## A. KEY TRADE & DEMOGRAPHIC INFORMATION

### SWEDEN

| | 2002 |
|---|---|
| Agricultural Imports From All Countries ($Mil)/U.S. Market Share (%) | 4,521/2% |
| Consumer Food Imports From All Countries ($Mil)/U.S. Market Share (%) | 3,680/2% |
| Edible Fishery Imports From All Countries ($Mil)/U.S. Market Share (%) | 799/ 1% |
| Total Population (Millions)/Annual Growth Rate (%) | 8.9/ 0.02? |
| Urban Population (Millions)/Annual Growth Rate (%) (2000) | 7.5/ N/A |
| Number of Major Metropolitan Areas | 4 |
| Size of the Middle Class (Millions)/Growth Rate (%) | N/A |
| Per Capita Gross Domestic Product (U.S. Dollars) | 26,000* |
| Unemployment Rate (%) | 4,0% |
| Per Capita Food Expenditures (U.S. Dollars) | 1,634 |
| Percent of Female Population Employed | 73.4%** |
| Average Exchange Rate US$ 1 for 2002 | 9.73 |

* 2002 est., Source: CIA World Fact Book
** Between ages 16 and 64, Source: SCB-AKU

Note: Above data on U.S. trade do not include substantial imports of U.S. products which are transshipped to Sweden via other EU countries.

## A. KEY TRADE & DEMOGRAPHIC INFORMATION

### FINLAND

| | 2002 |
|---|---|
| Agricultural Imports From All Countries ($Mil) /U.S. Market Share (%) | 2,045/ 3% |
| Consumer Food Imports From All Countries ($Mil)/U.S. Market Share (%) | 1,424/ 2% |
| Edible Fishery Imports From All Countries ($Mil)/U.S. Market Share (%) | 123/ - |
| Total Population (Millions)/Annual Growth Rate (%) | 5.2/ -0.3% |
| Urban Population (Millions)/Annual Growth Rate (%) | 3.2/ N/A |
| Number of Major Metropolitan Areas | 5 |
| Size of the Middle Class (Millions)/Growth Rate (%) | N/A |
| Per Capita Gross Domestic Product (U.S. Dollars) | 28,475 |
| Unemployment Rate (%) | 9.1% |
| Per Capita Food Expenditures (U.S. Dollars) | 1,616 |
| Percent of Female Population Employed (2001) | 63.6% |
| Average Exchange Rate US$ 1 for 2002 | EUR 1.06 |

Note: Above data on U.S. trade do not include substantial imports of U.S. products which are transhipped to Finland via other EU countries.

## B. CONSUMER FOOD & EDIBLE FISHERY PRODUCT IMPORTS

| Sweden Imports (In Millions of Dollars) | Imports from the World 2000 | 2001 | 2002 | Imports from the U.S. 2000 | 2001 | 2002 | U.S. Market Share 2000 | 2001 | 2002 |
|---|---|---|---|---|---|---|---|---|---|
| **CONSUMER-ORIENTED AG TOTAL** | 2,969 | 3,062 | 3,680 | 86 | 82 | 73 | 3 | 3 | 2 |
| Snack Foods (Excl. Nuts) | 249 | 277 | 340 | 1 | 1 | 1 | 1 | 1 | 0 |
| Breakfast Cereals & Pancake Mix | 55 | 55 | 63 | 1 | 1 | 1 | 0 | 0 | 0 |
| Red Meats, Fresh/Chilled/Frozen | 258 | 241 | 293 | 1 | 1 | 0 | 0 | 0 | 0 |
| Red Meats, Prepared/Preserved | 85 | 97 | 121 | 1 | 0 | 1 | 0 | 0 | 0 |
| Poultry Meat | 47 | 65 | 71 | 0 | 0 | 0 | 0 | 0 | 0 |
| Dairy Products (Excl. Cheese) | 51 | 61 | 106 | 1 | 1 | 1 | 0 | 0 | 0 |
| Cheese | 135 | 144 | 167 | 0 | 0 | 0 | 0 | 0 | 0 |
| Eggs & Products | 12 | 13 | 17 | 1 | 1 | 2 | 1 | 2 | 9 |
| Fresh Fruit | 387 | 387 | 450 | 6 | 5 | 5 | 2 | 1 | 1 |
| Fresh Vegetables | 238 | 257 | 285 | 1 | 1 | 1 | 0 | 0 | 0 |
| Processed Fruit & Vegetables | 288 | 287 | 331 | 26 | 25 | 23 | 9 | 9 | 7 |
| Fruit & Vegetable Juices | 94 | 78 | 93 | 2 | 3 | 3 | 2 | 4 | 3 |
| Tree Nuts | 21 | 20 | 21 | 9 | 8 | 7 | 41 | 41 | 34 |
| Wine & Beer | 291 | 290 | 354 | 13 | 11 | 5 | 5 | 4 | 1 |
| Nursery Products & Cut Flowers | 145 | 145 | 185 | 1 | 1 | 1 | 0 | 0 | 0 |
| Pet Foods (Dog & Cat Food) | 59 | 60 | 75 | 5 | 4 | 5 | 9 | 8 | 7 |
| Other Consumer-Oriented Products | 552 | 584 | 707 | 22 | 22 | 22 | 4 | 4 | 3 |
| **FISH & SEAFOOD PRODUCTS** | 704 | 733 | 799 | 5 | 6 | 8 | 1 | 1 | 1 |
| Salmon | 227 | 184 | 204 | 2 | 2 | 2 | 1 | 1 | 1 |
| Surimi | 3 | 3 | 6 | 0 | 1 | 1 | 0 | 1 | 3 |
| Crustaceans | 134 | 131 | 130 | 1 | 1 | 1 | 0 | 0 | 1 |
| Groundfish & Flatfish | 150 | 169 | 200 | 1 | 2 | 3 | 0 | 1 | 1 |
| Molluscs | 3 | 3 | 4 | 1 | 1 | 1 | 6 | 7 | 2 |
| Other Fishery Products | 187 | 243 | 255 | 1 | 2 | 1 | 1 | 1 | 1 |
| **AGRICULTURAL PRODUCTS TOTAL** | 3,809 | 3,912 | 4,521 | 133 | 129 | 111 | 4 | 3 | 2 |
| **AGRICULTURAL, FISH & FORESTRY TOTAL** | 5,155 | 5,295 | 6,375 | 166 | 158 | 141 | 3 | 3 | 2 |

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

## B. CONSUMER FOOD & EDIBLE FISHERY PRODUCT IMPORTS

| Finland Imports (In Millions of Dollars) | Imports from the World | | | Imports from the U.S. | | | U.S Market Share | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2000 | 2001 | 2002 | 2000 | 2001 | 2002 | 2000 | 2001 | 2002 |
| **CONSUMER-ORIENTED AGRICULTURAL TOTAL** | 1,285 | 1,309 | 1,424 | 31 | 27 | 24 | 2 | 2 | 2 |
| Snack Foods (Excl. Nuts) | 111 | 113 | 118 | 1 | 1 | 1 | 0 | 0 | 0 |
| Breakfast Cereals & Pancake Mix | 32 | 28 | 29 | 0 | 0 | 1 | 0 | 0 | 0 |
| Red Meats, Fresh/Chilled/Frozen | 65 | 48 | 50 | 1 | 1 | 1 | 0 | 0 | 0 |
| Red Meats, Prepared/Preserved | 15 | 20 | 25 | 0 | 1 | 1 | 0 | 0 | 0 |
| Poultry Meat | 11 | 10 | 9 | 0 | 0 | 0 | 0 | 0 | 0 |
| Dairy Products (Excl. Cheese) | 36 | 30 | 32 | 1 | 1 | 1 | 0 | 0 | 0 |
| Cheese | 73 | 78 | 82 | 1 | 1 | 1 | 0 | 0 | 0 |
| Eggs & Products | 1 | 2 | 3 | 1 | 1 | 1 | 15 | 13 | 14 |
| Fresh Fruit | 161 | 185 | 198 | 2 | 2 | 2 | 1 | 1 | 1 |
| Fresh Vegetables | 78 | 84 | 93 | 1 | 1 | 1 | 0 | 0 | 0 |
| Processed Fruit & Vegetables | 111 | 114 | 126 | 9 | 9 | 7 | 8 | 8 | 6 |
| Fruit & Vegetable Juices | 44 | 41 | 41 | 1 | 1 | 1 | 2 | 1 | 1 |
| Tree Nuts | 5 | 4 | 4 | 3 | 2 | 2 | 59 | 47 | 50 |
| Wine & Beer | 89 | 99 | 114 | 4 | 3 | 2 | 4 | 3 | 2 |
| Nursery Products & Cut Flowers | 51 | 53 | 56 | 1 | 1 | 1 | 0 | 0 | 0 |
| Pet Foods (Dog & Cat Food) | 40 | 42 | 48 | 3 | 4 | 4 | 9 | 10 | 9 |
| Other Consumer-Oriented Products | 362 | 357 | 397 | 8 | 5 | 4 | 2 | 1 | 1 |
| **FISH & SEAFOOD PRODUCTS** | 103 | 114 | 123 | 1 | 1 | 1 | 1 | 0 | 0 |
| Salmon | 28 | 28 | 29 | 1 | 1 | 1 | 1 | 0 | 0 |
| Surimi | 1 | 1 | 1 | 0 | 0 | 0 | 0 | 0 | 0 |
| Crustaceans | 16 | 16 | 14 | 1 | 1 | 1 | 0 | 0 | 0 |
| Groundfish & Flatfish | 17 | 18 | 20 | 1 | 0 | 0 | 0 | 0 | 0 |
| Molluscs | 1 | 1 | 1 | 0 | 1 | 1 | 0 | 0 | 0 |
| Other Fishery Products | 41 | 50 | 59 | 1 | 1 | 1 | 1 | 1 | 0 |
| **AGRICULTURAL PRODUCTS TOTAL** | 1,872 | 1,908 | 2,045 | 76 | 86 | 61 | 4 | 5 | 3 |
| **AGRICULTURAL, FISH & FORESTRY TOTAL** | 2,565 | 2,710 | 2,910 | 83 | 93 | 67 | 3 | 3 | 2 |

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

## C. TOP 15 SUPPLIERS OF CONSUMER FOODS & EDIBLE FISHERY PRODUCTS

### Sweden- Top 15 Suppliers

**CONSUMER-ORIENTED AG IMPORTS**

| ($1,000) | 2000 | 2001 | 2002 |
|---|---|---|---|
| Denmark | 524,700 | 597,536 | 738,040 |
| Netherlands | 551,241 | 533,425 | 629,321 |
| Germany | 321,934 | 331,001 | 413,701 |
| Spain | 171,585 | 179,905 | 227,202 |
| Italy | 172,784 | 190,881 | 226,162 |
| France | 177,246 | 192,152 | 211,078 |
| Belgium | 99,370 | 114,798 | 147,272 |
| Finland | 96,625 | 112,677 | 143,900 |
| United Kingdom | 116,260 | 123,190 | 141,599 |
| Ireland | 110,312 | 103,777 | 125,099 |
| Norway | 60,668 | 61,020 | 81,446 |
| United States | 86,455 | 81,781 | 73,247 |
| Panama | 43,373 | 27,390 | 57,391 |
| Austria | 32,690 | 29,593 | 40,064 |
| Poland | 27,370 | 27,417 | 35,774 |
| Other | 376,158 | 355,392 | 388,142 |
| World | 2,968,811 | 3,062,007 | 3,679,515 |

**FISH & SEAFOOD PRODUCT IMPORTS**

| ($1,000) | 2000 | 2001 | 2002 |
|---|---|---|---|
| Norway | 485,496 | 491,783 | 537,404 |
| Denmark | 100,577 | 109,712 | 118,974 |
| Netherlands | 16,805 | 17,913 | 19,708 |
| Iceland | 8,979 | 13,475 | 16,159 |
| Germany | 5,015 | 5,929 | 11,781 |
| Canada | 12,993 | 9,641 | 10,790 |
| Thailand | 8,215 | 8,770 | 9,258 |
| China | 13,568 | 16,797 | 8,033 |
| United States | 4,523 | 5,974 | 7,871 |
| France | 4,884 | 5,569 | 7,153 |
| Latvia | 4,861 | 6,362 | 5,705 |
| Estonia | 4,558 | 4,041 | 4,626 |
| Turkey | 1,507 | 2,369 | 4,159 |
| Ireland | 2,632 | 2,752 | 3,281 |
| Finland | 2,273 | 1,967 | 3,089 |
| Other | 26,875 | 30,074 | 30,783 |
| World | 703,758 | 733,143 | 798,786 |

Source: United Nations Statistics Division

## C. TOP 15 SUPPLIERS OF CONSUMER FOODS & EDIBLE FISHERY PRODUCTS

### Finland - Top 15 Suppliers

**CONSUMER-ORIENTED AG IMPORTS**

| ($1,000) | 2000 | 2001 | 2002 |
|---|---|---|---|
| Sweden | 209,730 | 192,357 | 214,960 |
| Netherlands | 140,046 | 147,750 | 154,521 |
| Germany | 116,703 | 117,501 | 137,735 |
| France | 115,476 | 125,752 | 135,713 |
| Spain | 106,829 | 114,563 | 126,506 |
| Denmark | 111,091 | 114,060 | 111,474 |
| Belgium | 57,081 | 59,822 | 61,460 |
| Italy | 47,996 | 57,809 | 61,452 |
| United Kingdom | 49,658 | 43,260 | 48,432 |
| Costa Rica | 21,106 | 27,891 | 43,518 |
| Ireland | 38,809 | 29,612 | 38,436 |
| Brazil | 29,586 | 24,829 | 25,678 |
| United States | 30,740 | 26,818 | 23,778 |
| South Africa | 11,275 | 13,037 | 18,027 |
| Austria | 12,261 | 12,958 | 16,056 |
| Other | 186,666 | 201,165 | 206,491 |
| World | 1,285,136 | 1,309,258 | 1,424,325 |

**FISH & SEAFOOD PRODUCT IMPORTS**

| ($1,000) | 2000 | 2001 | 2002 |
|---|---|---|---|
| Norway | 46,187 | 50,181 | 53,728 |
| Sweden | 14,903 | 19,180 | 21,385 |
| Denmark | 8,583 | 8,076 | 10,584 |
| Thailand | 6,395 | 6,390 | 8,073 |
| Germany | 4,217 | 3,189 | 5,183 |
| Iceland | 2,858 | 2,783 | 4,012 |
| Estonia | 2,944 | 2,718 | 2,875 |
| Philippines | 2,007 | 2,166 | 2,612 |
| Canada | 2,385 | 2,585 | 2,320 |
| Spain | 1,313 | 1,901 | 2,030 |
| Netherlands | 3,197 | 4,803 | 1,930 |
| Seychelles | 1,457 | 3,097 | 1,778 |
| Faroe Islands | 236 | 145 | 1,472 |
| France | 611 | 589 | 568 |
| Mauritius | 257 | 1,540 | 558 |
| Other | 4,966 | 4,219 | 3,899 |
| World | 102,518 | 113,573 | 123,012 |

Source: United Nations Statistics Division