

LIVSMEDELSFÖRETAGEN

The Swedish Food Federation

VILKA ÄR VI?

Livsmedelsföretagen är bransch- och arbetsgivarorganisation för alla som gör mat och dryck i Sverige

Livsmedelsföretagen har drygt 800 medlems-företag inom alla typer av delbranscher – alltifrån stora mejeriföretag till små bagerier

Tillsammans verkar vi för att livsmedelsindustrin ska ha goda villkor och åtnjuta ett högt anseende



DEN SVENSKA LIVSMEDELSINDUSTRIN

Livsmedelsindustrin är Sveriges fjärde största industrigren sett till omsättning (177 mdkr) och sysselsätter 49 000 personer

Det exporteras mat och dryck för 50 mdkr årligen (det senaste decenniet har livsmedels-exporten ökat mer än nästan alla varugrenar)

Livsmedelsindustrin är den industrigren där det startas flest nya företag

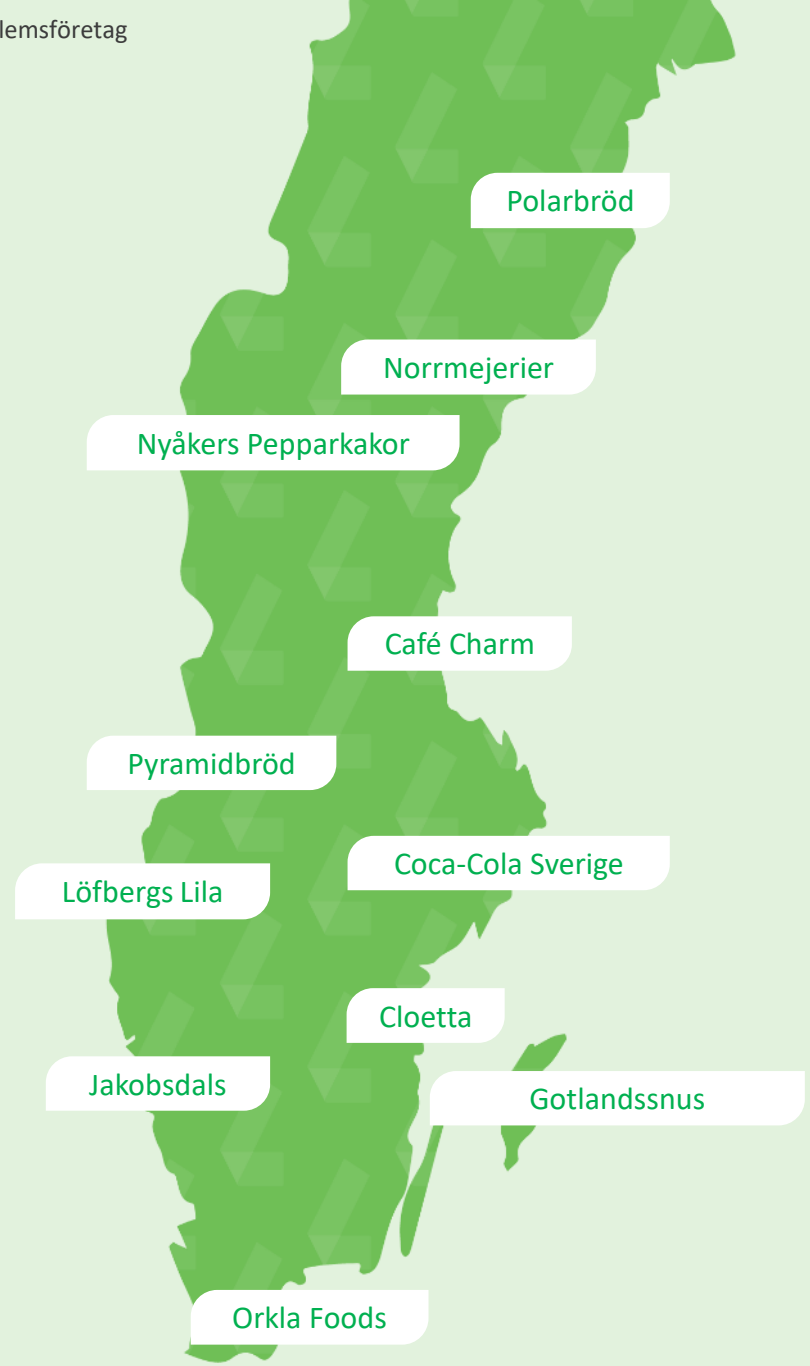


HELA SVERIGES BRANSCH

FRÅN KIRUNA TILL TRELLEBORG
Livsmedelsindustrin är den geografiskt kanske mest spridda industrin och våra företag bidrar till jobb och utveckling i hela landet

EN INTEGRATIONSINDUSTRI
Livsmedelsindustrin är bättre än andra industrier på att ta tillvara på kompetenser från utlandsfödda – 18% i livsmedelsbranschen är utlandsfödda jämfört med 13% i hela industrin

Några av våra medlemsföretag



VÅRA MEDLEMSFÖRETAG

FÖRETAGSSTORLEK (EU STANDARD)	ANTAL ANSTÄLLDA	ANTAL FÖRETAG
MICRO	0-9	306
LITET	10-49	352
MELLAN	50-249	117
STORT	>250	33







TOP TIO EXPORTLÄNDER

NORGE	19%
DANMARK	15%
FINLAND	11%
TYSKLAND	9%
USA	6%
STORBRITTANIEN/ NORDIRLAND	5%
NEDERLÄNDERNA	3%
FRANKRIKE	3%
SPANIEN	2%
POLEN	2%

EXPORTRAPPORTEN

VAD KAN LIVSMEDELSINDUSTRIN LÄRA AV ANDRA LÄNDER OCH INDUSTRIER?

- Stålindustrin, Life-Science & Träindustrin
- Danmark, Finland & Irland
- Studie genom intervjuer med företrädare



PÅ VÄG MOT 100 MILJARDER

- Export ett prioriterat område för Livsmedelsföretagen
- Målet är fördubblad export till 2025
- För att bli mindre beroende av detaljhandeln
- Krävs större marknad än Sverige
- Outnyttjad kapacitet
- Starkt varumärke



FRAMGÅNGSFAKTORER

- Hög grad av samarbete
- Specialisering/nischer
- Närvaro utomlands
- Långsiktighet



FÖRSLAG TILL ÅTGÄRDER

- **ÖKA FÖRÄDLINGSGRADEN – Innovationsklimatet är centralt. Vi behöver mer forskning på alla nivåer. Sweden Food Arena behöver fullt ut etableras och de statliga satsningarna på livsmedelsforskning öka signifikant.**
- **ÖKA NÄRVARON – Antalet delegationsresor måste öka. En högre ministernärvaro på både ingående och utgående delegationsresor är ett nödvändigt. Fler riktade satsningar på identifierade nyckelmarknader bör göras.**
- **REGELFÖRENKLING – Myndighetsprocesser och regelverk måste förenklas. Livsmedelsföretagen föreslår därför en översyn av EU-lagstiftning som rör livsmedel: i de fall en restriktivare tolkning finns ska denna tolkning motiveras. annars ska den europeiska miniminivån gälla.**
- **TÄTARE BAND – Samarbetet mellan akademi, näringsliv och offentlig sektor måste bli tätare. Exportfrämjandet bör kopplas till befintliga strukturer som Sweden Food Arena och Food Science Sweden.**
- **GRATIS RÅDGIVNING – Erbjud 10 timmar gratis rådgivning för SME-företag. En exportplan och minst en passande marknad för företaget ska identifieras.**
- **FLER FRÄMJARE –Sverige bör senast 2030 ha minst 50 personer dedikerade att öka livsmedelsexporten på olika marknader runtom i världen.**

Redskap för en ökad livsmedelsexport

– en livsmedelsstrategi för Sverige





Illustration: Itziar Castany Ramirez/Regeringskansliet



”Den svenska livsmedelskedjan år 2030 är globalt konkurrenskraftig, innovativ, hållbar och attraktiv att verka inom”

Illustration: Itziar Castany Ramirez/Regeringskansliet

Livsmedelsstrategins övergripande mål

Övergripande målet

Det övergripande målet för livsmedelsstrategin ska vara en konkurrenskraftig livsmedelskedja där den totala livsmedelsproduktionen ökar, samtidigt som relevanta nationella miljömål nås, i syfte att skapa tillväxt och sysselsättning och bidra till hållbar utveckling i hela landet. Produktionsökningen, både konventionell och ekologisk, bör svara mot konsumenternas efterfrågan. En produktionsökning skulle kunna bidra till en ökad självförsörjningsgrad av livsmedel. Sårbarheten i livsmedelskedjan ska minska.

Långsiktighet och satsningar

- Livsmedelsstrategins mål påverkar inriktningen i en mängd beslut
- Regeringens handlingsplan innehåller åtgärder som stödjer målen
- Samverkan med näringen och dess insatser är avgörande för att strategin ska utvecklas



Nuvarande handlingsplan

- Handlingsplanen har genererat över 40 uppdrag inom de tre strategiska områdena och några tvärgående

- Regeringen har satsat 1 matmiljard

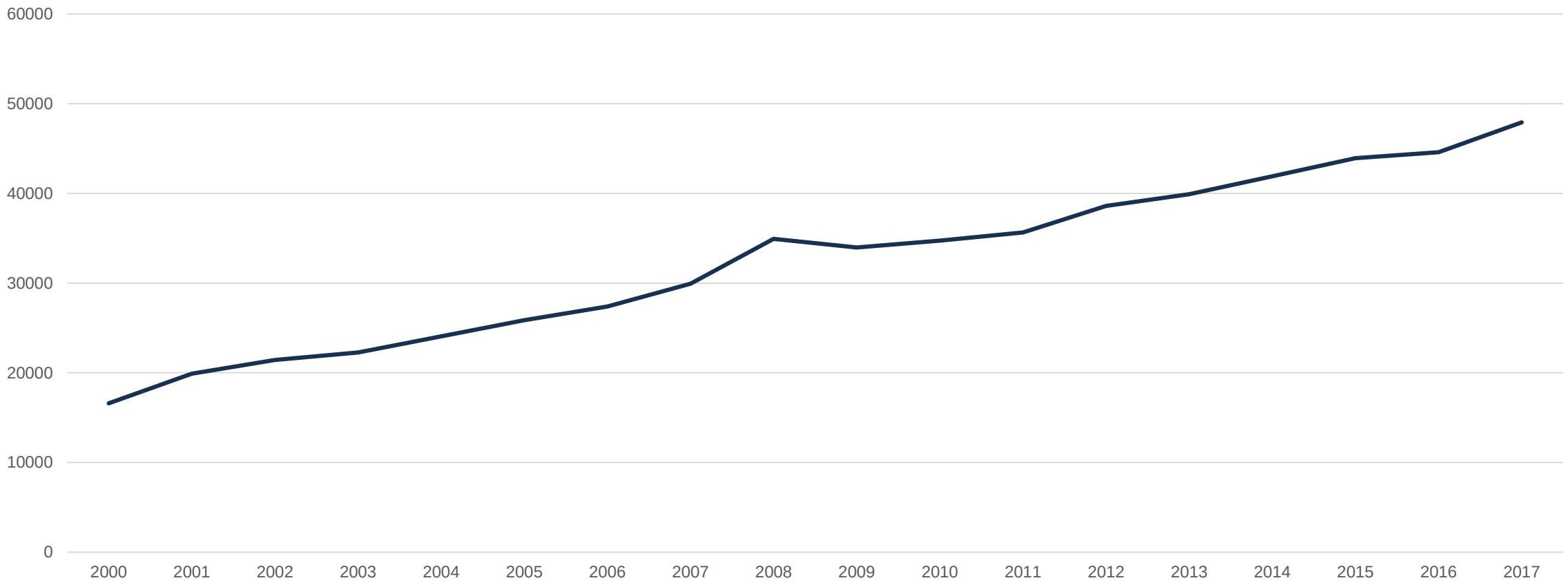
➢ Nationellt forskningsprogram för livsmedelssektorn

➢ Sweden Food Arena



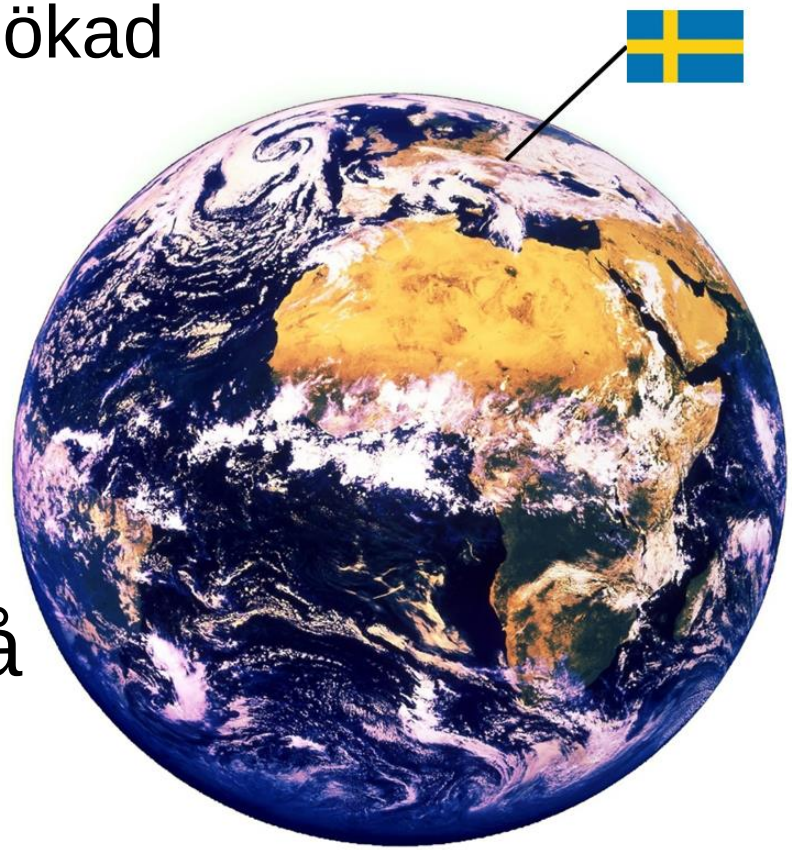
”Den svenska livsmedelsexporten ska ges förutsättningar att öka för att möta efterfrågan på relevanta marknader.”

God trend för svensk livsmedelsexport



Satsning på livsmedelsexport

Operativt program för ökad livsmedelsexport



Program för ekologiska livsmedel

Exportansvariga på utlandsmarknader

Regionalt export-program: livsmedelsaccelerator

SVERIGES STYRKOR TILL FÖRDEL GLOBALT

KONKURRENS, PRISNIVÅER OCH LOGISTIK ÄR DE STÖRSTA UTMANINGARNA

SAMMANFATTNING 3 (3)

SEGMENT

1. **BRÖD**: 3,7 MDSEK export (8%*, 28%**). Strukturen skiljer exportfokus för mjukt resp. hårt börd samt kex. Styrka i hälsosamma nischprodukter, vilket motsvarar globala trender. Utmaningar i hård konkurrens, prispress, logistik (fryst) och konkurrens från färskt börd.
2. **DRYCK**: 0,9 MDSEK export (2%*, 25%**). Svensk styrka i trendiga drycker såsom ekologiskt, funktion och energi, men också smaker. Globala trender mot hälsa, ekologiskt och mindre socker. Utmaningar i stark konkurrens från globala storbolag och utmanande logistik.
3. **FÅGEL**: 0,4 MDSEK export (1%*, 19%**). Strukturen skiljer exportfokus för fågelkött, biprodukter och kläckägg.**** Styrkor i djurhållning, antibiotika och produktionssäkerhet ligger i linje med global ökad efterfrågad i takt med hälsotrenden. Möjligheter i alla kundgrupper. ***** Stark inhemsk konkurrens.
4. **FÄRDIGRÄTTER**: 1,2 MDSEK export (2%*, 32%*). Strukturen skiljer exportfokus för färska och frysta färdigrätter. Styrkor inom nyttiga och vegetariska rätter. Segmentet växer globalt inom convenience. Möjligheter i alla kundgrupper. ***** Prisnivån och logistik för fryst största utmaningar.
5. **KÖTT**: 2,2 MDSEK export (5%*, 14%**). Strukturen skiljer exportfokus för biprodukter, kött och chark. Styrkor inom djurhållning, låg antibiotika användning och ekologiskt. Möjligheter för ekologiskt; i Asien även för västerländska produkter. Konkurrens och logistik utmaningar.
6. **KVARN*****: 1 MDSEK export (2%*, 21%**). Styrkor inom ekologiskt, free-from, hälsosamma produkter och hållbarhet som ligger i linje med globala trender. Möjligheter i alla kundgrupper. ***** Inhemsk konkurrens, skydd av inhemska producenter och prispress största utmaningarna.
7. **MEJERI**: 3,0 MDSEK export (6%*, 15%**). Strukturen skiljer exportfokus för stormejerier, ost och glass. Styrkor i innovation, livsmedelssäkerhet och ekologiskt. Efterfråga på nischprodukter i Europa & västerländsk i Asien. Möjligheter i alla kundgrupper. ***** Konkurrens & tullar största utmaningarna.
8. **SMAK*****: 1,4 MDSEK export (3%*, 25%**). Styrkor i livsmedelssäkerhet, innovationer & trendigt erbjudande i linje med global efterfrågan. Konkurrens & prispress utmaningar. Innovationer med branschöverskridande möjligheter är en styrka för kundvärdet. Möjligheter i alla kundgrupper. *****
9. **SPRIT**: 4,2 MDSEK export (9%*, 44%**). Strukturen skiljer exportfokus för små och stora bolag. Styrkor inom tradition, kvalitet, innovation. Efterfrågan på premium ökar globalt och ändrade asiatiska konsumtionsmönster ökar volymer. Konkurrens, skatter och representation är utmaningar.
10. **SÖTT*****: 3,8 MDSEK export (8%*, 25%**). Många små svenska företag starka på innovation, trend- & kundanpassningar. Ökad efterfrågan på nyttigare sötsaker, mindre socker samt ekologiskt. Möjligheter i alla kundgrupper.***** Konkurrens från globala storbolag samt prispress största utmaningarna.
11. **TOBAK**: 2,0 MDSEK export (4%*, 33%**). Styrkor i svensk unicitet, lång hållbarhet, god lönsamhet och ekologiska alternativ. Möjligheter för snus och tar marknadsandelar från rökning. Låg kännedom om produkten ”snus” samt importtullar största utmaningarna.
12. **ÖL & CIDER**: 2,0 MDSEK export (4%*, 24%**). Strukturen skiljer exportfokus för öl och cider. Styrkor i unik produkt (cider), innovativa bryggerier med professionell kommunikation samt stark produktion av ekologisk öl, vilket är i linje med globala trender. Konkurrens och logistik stora utmaningar.

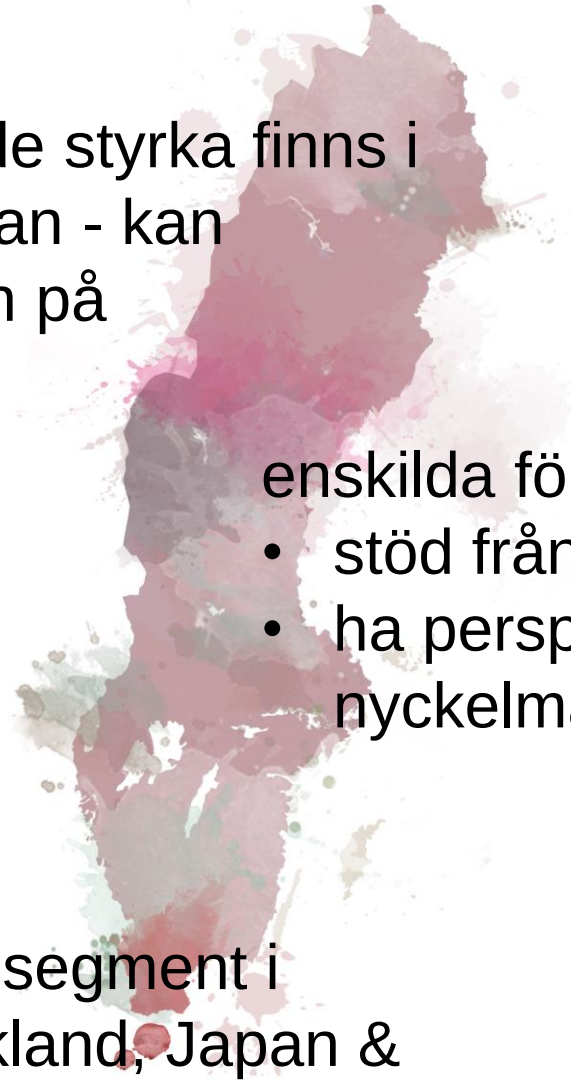
Svenska styrkor

- hållbarhet
- livsmedelssäkerhet
- innovativa nischprodukter
- snabbfotade företag



Regeringskansliet

Svensk industris övergripande styrka finns i kvalitet längs hela värdekedjan - kan användas i kommunikationen på utlandsmarknader



enskilda företagens arbete är avgörande:

- stöd från ledning
- ha perspektivet hemmamarknad för nyckelmarknader utomlands

Potentialen är störst för flest segment i Kanada, Storbritannien, Tyskland, Japan & Hongkong


TRY
SWEDISH!


TRY SWEDISH!
TRY SWEDISH!
TRY SWEDISH!
Taste of Fresh Winds
Peaceful Forests
Clean Waters
PolarWings
ORGANIC CHICKEN
EKOBRYGGERIET
Med smak av svenska skogen

Utlandsstationerade livsmedelsansvariga



Therese Dalenbrant



Caleb Chapman



SookYoung Lim



Carl Norsten



Elaine Tham

Näringslivet och det offentliga

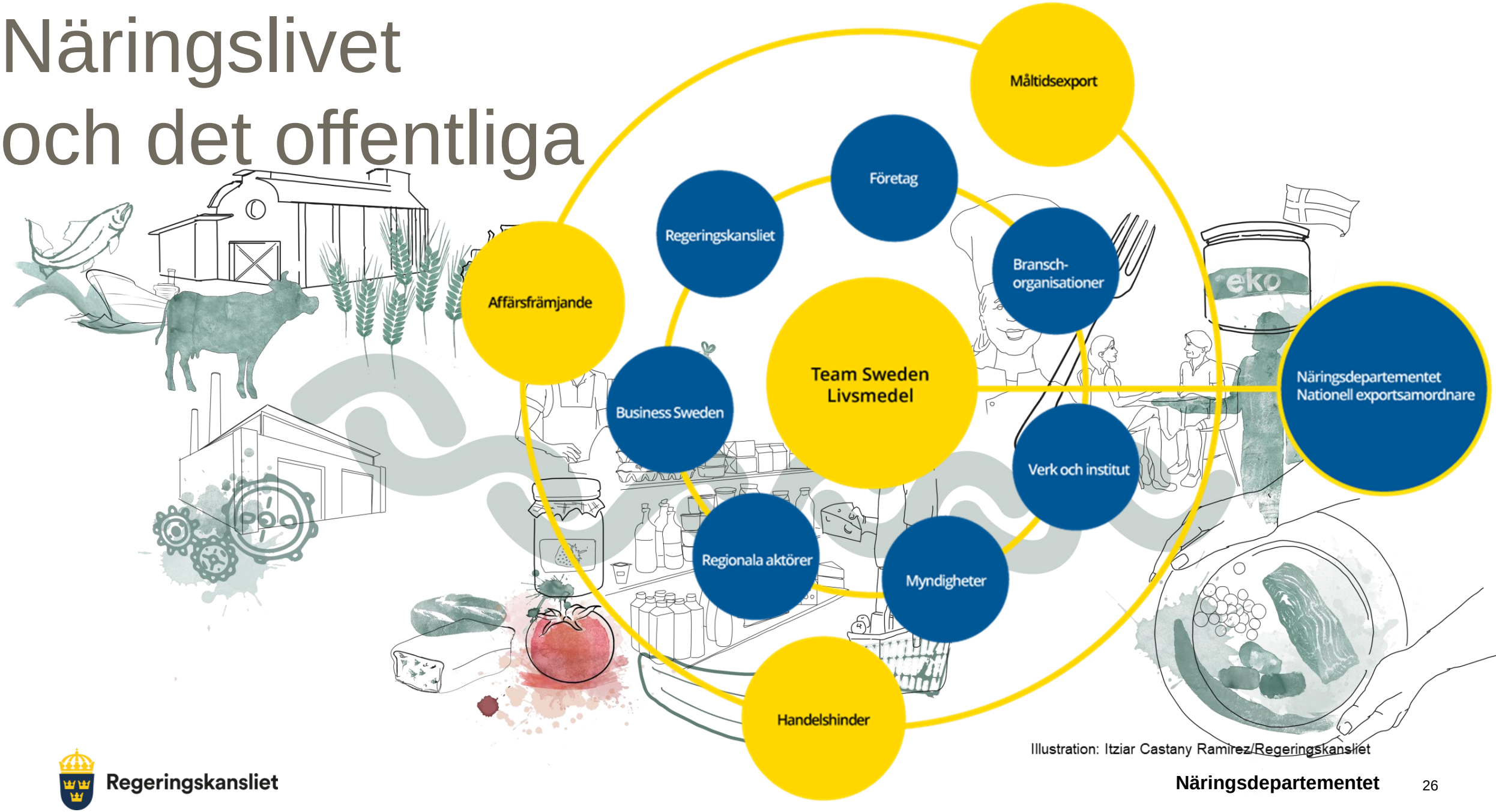


Illustration: Itziar Castany Ramirez/Regeringskansliet

Redskap för ökad livsmedelsexport

- Långsiktighet i livsmedelsstrategin
- Satsning på 48 miljoner kronor
- Prioritera exporten
- Ökat samarbete mellan näringslivet och det offentliga



Regeringskansliet

Exportandel på 50 procent 2030 – hur når vi dit?

Tack!

Johan Krallis Anell
Nationell exportsamordnare för livsmedelssektor

TRY SWEDISH! 

A taste of Innovation

Maria Varnauskas, Manager Try Swedish Export program , Business Sweden

TRY SWEDISH! EXPORT PROGRAM

ÖKA SVERIGES LIVSMEDELSEXPORT *genom att…*

Inspirera fler livsmedelsföretag att börja sälja internationellt

Hjälpa livsmedelsföretag att växa globala försäljning

TRY SWEDISH! EXPORT PROGRAM

ÖKA LIVSMEDELSEXPORTEN FRÅN SVERIGE *genom …*

MÅL

Prioriterade globala marknader – innaför och utanför Europa …

Inspirera fler företag att börja sälja internationellt *genom..*	Hjälpa livsmedels företag att växa sin internationella försäljnng genom….

NYCKEL AKTIVITETER

- Identifiera SME företag med internationell potential
- Kompetensutveckling till SME företag i internationell försäljning och export regler
- Visa på goda exempel på export företag
- Export Accelerator Program för SME företag med stor export potential
- Livsmedelsansvarig på prioriterade marknader
- Genomförande av säljfrämjande aktiviteter som mässor, matchmaking, besöksprogram m.m.
- Special program för ekologiska livsmedel
- Trendspotting och informing om internationella trender och affärsmöjligheter opportunities

VERKTYG

Seminarier , workshops och utbildning i Sverige	Sverige montrar på utvalda livsmedels mässor	Inköps samarbeten inkl online	Digitala platformar and kampanjer	Food Business Days & matchmaking

Kommunikations platform: TRY SWEDISH!

TRY SWEDISH! KULINARISK EXPORT

Livsmedels regleringar och exportprotokoll

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SLUTRAPPORT*

ANALYS AV EXPORTPOTENTIALEN UTIFRÅN LIVSMEDELSSEGMENT

REGERINGSKANSLIET (NÄRINGSDEPARTEMENTET)

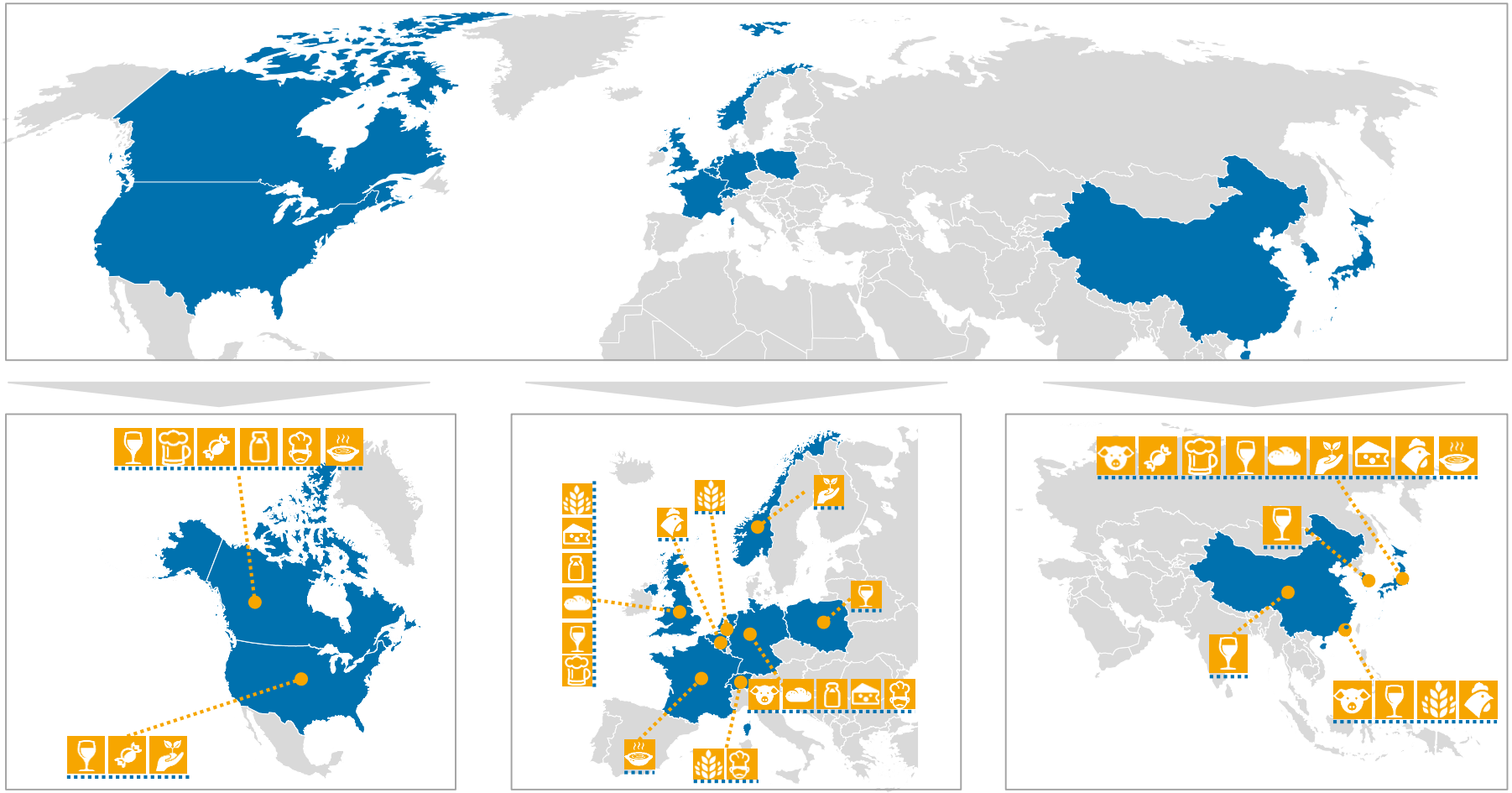
29 mars 2018
Business Sweden

**Komplett med 2018-03-29 Appendix "Analys av exportpotentialen hos livsmedelssegment" Regeringskansliet (Näringsdepartementet)*
Om inget annat anges är källan för rapporten Business Swedens analys

14 RELEVANTA MARKNADER IDENTIFIERADE

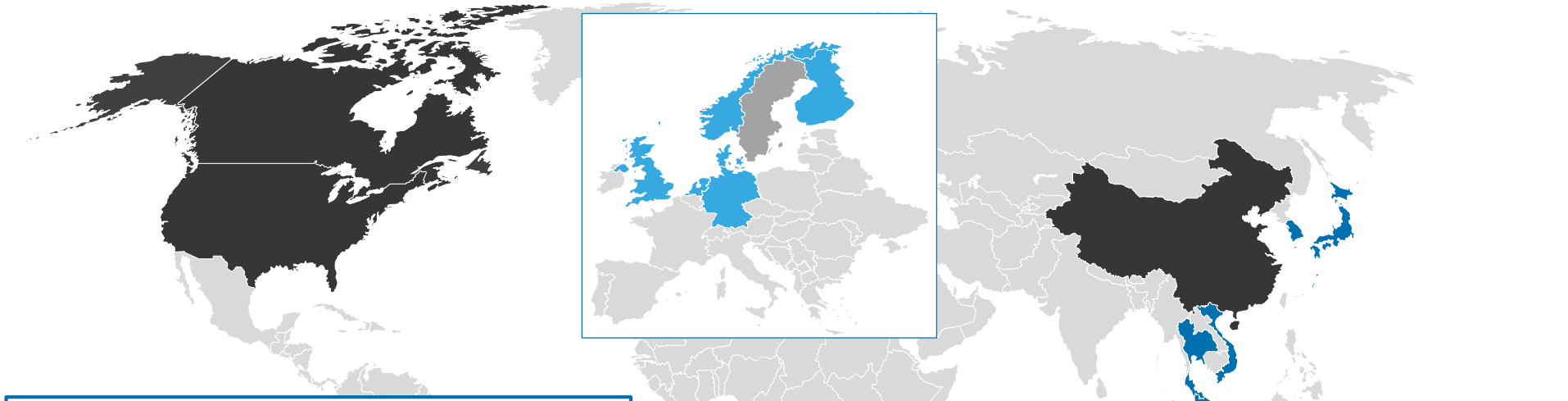
KANADA, STORBRITANNIEN, TYSKLAND, JAPAN & HONGKONG BREDAST POTENTIAL

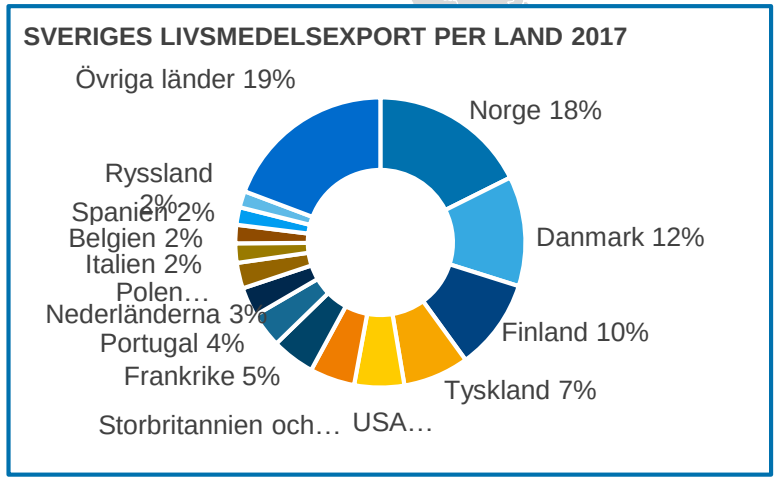
SAMMANFATTNING 1 (3)



SVERIGES FOKUSLÄNDER FÖR FRÄMJANDE IDAG

SAMT SVERIGES LIVSMEDELSEXPORT PER LAND





= 10 Try Swedish fokusmarknader: Norge, Danmark, Finland, Tyskland, Holland, Storbritannien, Hongkong, Kina, USA, Kanada

= 3 marknader/regioner med dedikerade livsmedelsansvarig: USA/Kanada, Japan/Sydkorea och Singapore/Sydostasien och 1 marknad med en Skogs- och lantbruksråd i Kina

= 3 marknader i fokus för båda ovan: Kanada, Kina och USA

KÄLLA: SVERIGES REGERING, STYRGRUPPEN FÖR TRY SWEDISH EXPORTPROGRAM, SCB

TRY SWEDISH – EXPORTPROGRAM

Fokus 2018-2019

1) Acceleratorprogram för SME
2) Utlandsstationerade livsmedelsansvariga
3) Särskild satsning på ekologisk export
4) Kommunikations- och marknadsföringsaktiviteter inom Try Swedish
5) Främjandeaktiviteter

2) ACCELERATORPROGRAM FÖR SME

- 40st prioriterade bolag
  - Produkter med stor internationell potential
  - Omsättning >20MSEK och eget kapital >1MSEK
  - Befintlig export idag
  - Ägare och ledning med vilja och förutsättningar att lyckas med internationell expansion
- Särskilt stöd för accelererad ökning av företagets globala försäljning 2018-2019
  - Strategi för ökad global försäljning
  - Stöd för genomförande på valda marknad/er



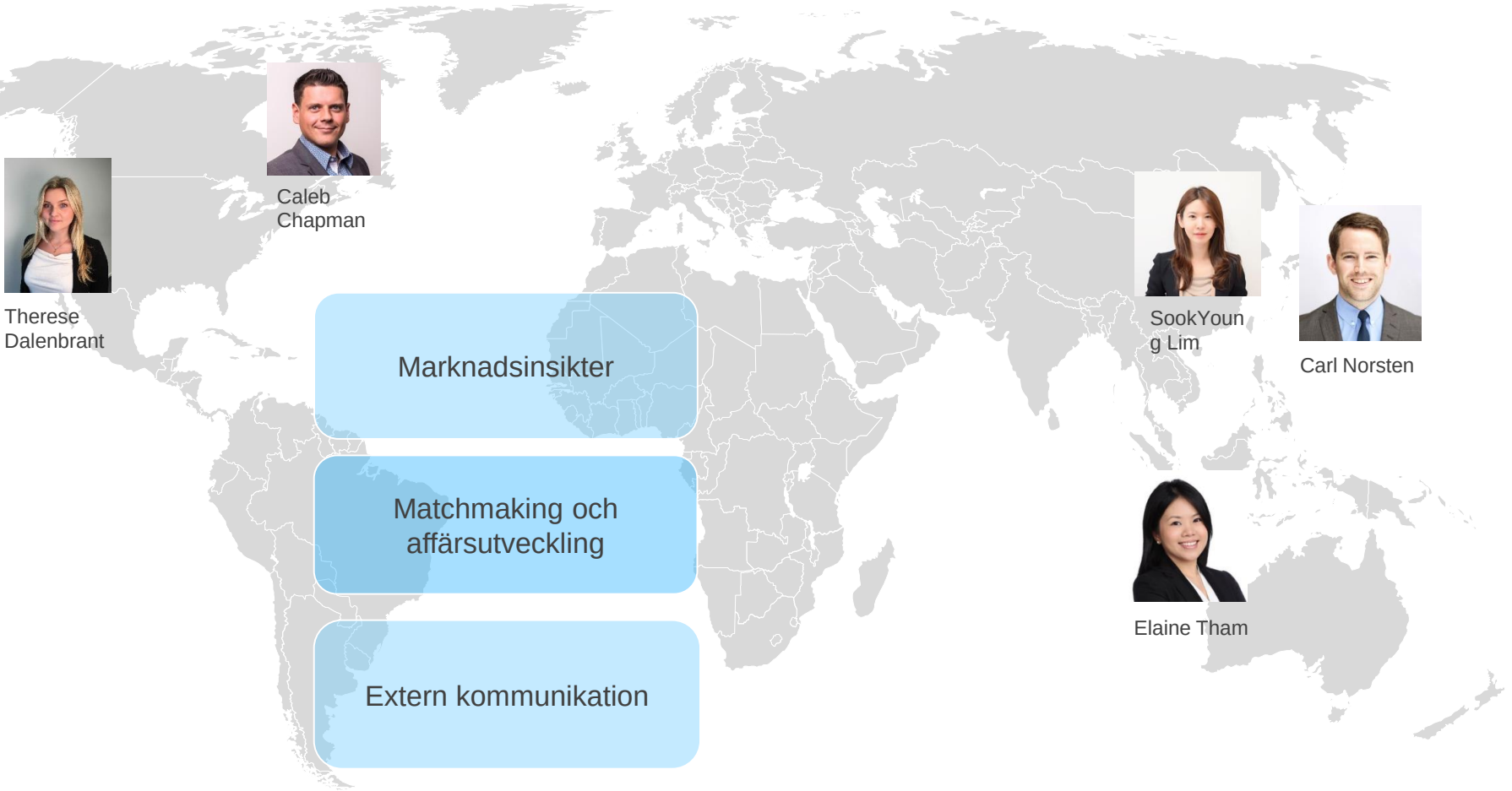
Jonas Englund



David Carlsson

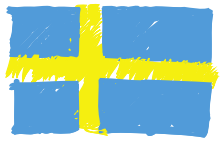
3) UTLANDSSTATIONERADE LIVSMEDELSANSVARIGA

SWEDISH FOOD EXPORT PORTAL



4) SATSNING PÅ EXPORT AV EKOLOGISKA LIVSMEDEL

Nya säljkanaler	Identifiera och etablering av nya samarbete med ekoprofilerade kedjor på prioriterade marknader		PROJEKTLEDARE
Exportutveckling SME (ekologiskt)	Exportaccelerator SME Livsmedelsguiden		
Mässor	NOFF , NOPA 2018	BIOFACH 2019,Natural Products Expo West 2019 NOFF 2019	
Kommunikation	Try Swedish! eko Seminarier Nordisk samverkan		

TRY SWEDISH! 

DIGITAL & SOCIAL MEDIA 2.0



SVERIGES STYRKOR INOM LIVSMEDEL

- Unikt klimat (med fyra årstider, midnatts sol) rent vatten producerar unika smaker och råvaror (vilda bär havre ..)
- Hållbarhet
- Innovationsdrivna
- Djur omsorg, antibiotika fritt
- Livsmedelssäkerhet
- Hälsomedvetenhet
- Modern livsstil

1) FRÄMJANDEAKTIVITETER 2019

Kvartal 1	Kvartal 2	Kvartal 3	Kvartal 4
ISM 28-30/1 Köln	Nordic Food Business Days Hongkong 6/5	Anuga Köln 5-9/10	
Biofach Nurnberg13-16/2	Hofex Hong Kong 7-10/5		
Organic Food Business Days Toronto (tbd)	SIAL China 14-16/5		
Natural Products expo West Anaheim, 5-9/3	PLMA Amsterdam 21-22/5		Natural Organic Food fair, Nov Malmö
Foodex, Tokyo 5-8/3			

Ocado

Market Kurly

SEMINARIER OCH WEBINARS

TRY SWEDISH

TACK !

MARIA VARNAUSKAS, MANAGER TRY SWEDISH EXPORTPROGRAM, BUSINESS SWEDEN



THE SWEDISH TRADE & INVEST COUNCIL

BUSINESS SWEDEN

FOOD & BEVERAGE (F&B) OPPORTUNITIES IN JAPAN

FOOD EXPORT PORTAL – OVERVIEW OF THE JAPANESE F&B MARKET

CARL NORSTEN, BUSINESS SWEDEN TOKYO, 6 NOVEMBER 2018

Image credits: Magnus Skoglöf/imagebank.sweden.se

JAPAN HAS A LARGE & SOPHISTICATED F&B MARKET

EU-JAPAN EPA WILL MAKE THE MARKET MORE ACCESSIBLE FOR EU FOOD IMPORTS



Large market & high purchasing power
- 127 million population
- Large F&B interest and consumption
- Changing consumption patterns

Strict food standards & regulation
- Food additives, inspection, labelling etc.
- Need for strong local partner

High food import dependency (69%)
- Growing food imports (+22% '13-'17).
- EU-Japan EPA (expected Q1-Q2 2019)



Tokyo

The world's largest urban areas with 37 million population

Tokyo has more restaurants in Guide Michelin than any other city (234)

Consumers seek convenience due to busy lifestyle, dual-income/single households (11 mn households, +54% last 30 years)

Changing consumption pattern towards more meat, dairy products, wine, "western" breakfast

Japan has a large ageing population, with certain dietary concerns / preferences

Consumers generally prefer domestic products, if not premium imported products
- Less discrimination in favor of domestic products in food service & B2B markets

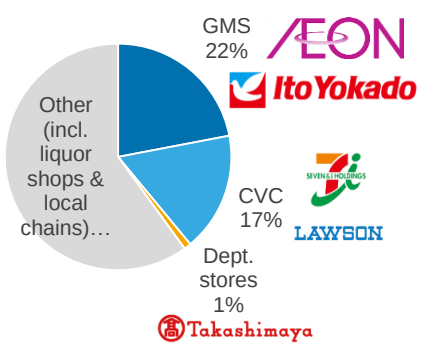
OVERVIEW F&B TRENDS IN JAPAN; RETAIL, FOOD SERVICE, FOOD PROCESSING/ B2B AND E-COMMERCE

RETAIL

- Highly fragmented
- Large network of quite small local store chains (18 400 GMS, 54 400 CVC)
- Single & double-income households increasing

Market trend:

Sales by channel (value)

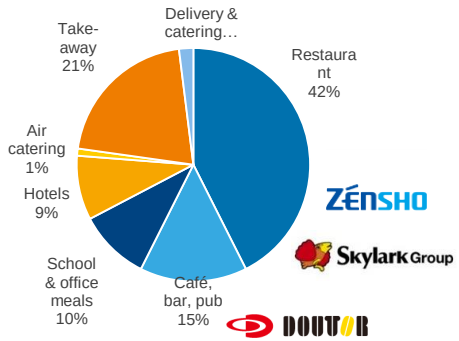


FOOD SERVICE

- Increasing demand for take-out & ready-made
- 27 million inbound tourists to Japan in 2017
- Less discrimination in favor of JP products

Market trend:

Sales by channel (value)

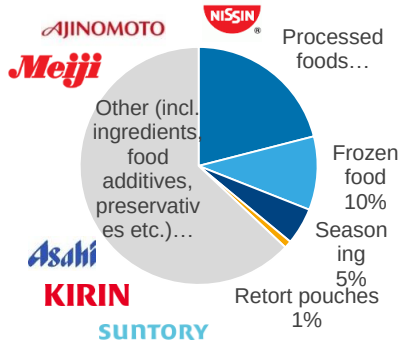


B2B

- Large opportunities for ingredients & additives
- OEM license production of foreign brands
- Less discrimination in favor of JP products

Market trend:

Sales by segment (value)

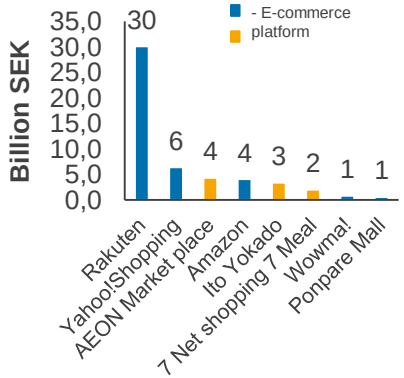


E-COMMERCE

- E-commerce F&B sales growing the last 5 years
- Most food products are sold online in Japan thanks to excellent infrastructure and timely cold-chain delivery

Market trend:

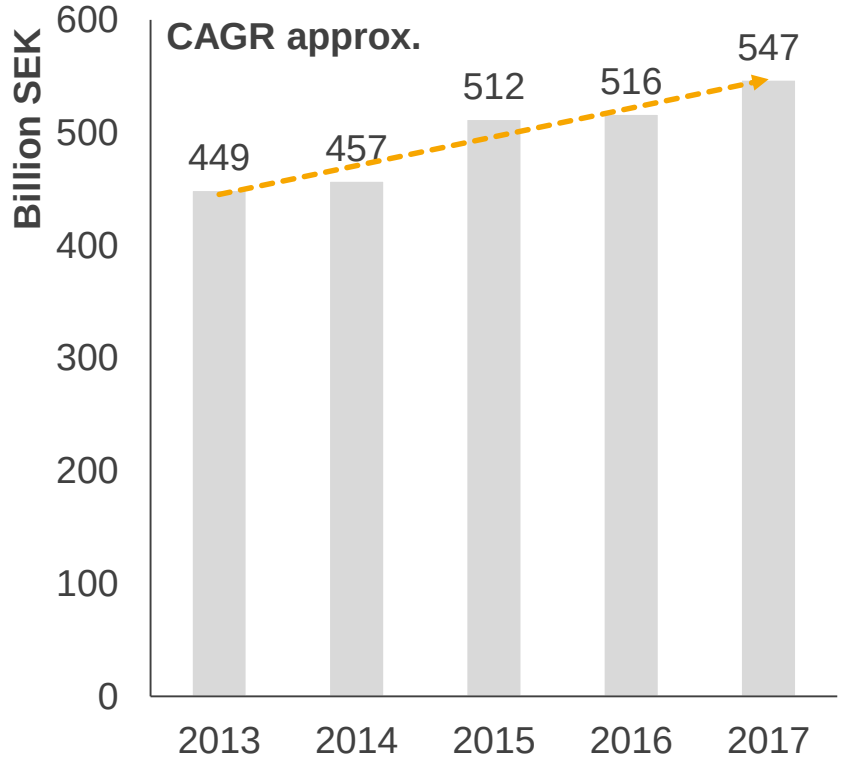
F&B E-commerce sales



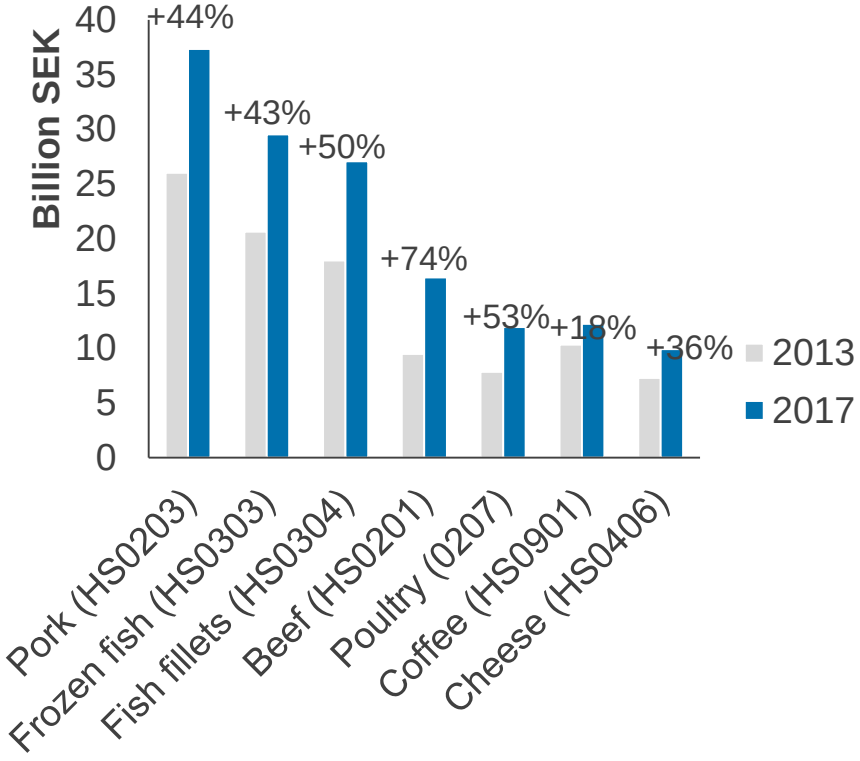
LARGE AND GROWING FOOD IMPORTS TO JAPAN

FOOD & DRINKS IMPORTS OF APPROX. 550 BILLION SEK IN 2017, +22% SINCE 2013

FOOD & DRINKS IMPORTS TO JAPAN 2013-2017



GROWTH OF SELECTED IMPORT SEGMENTS

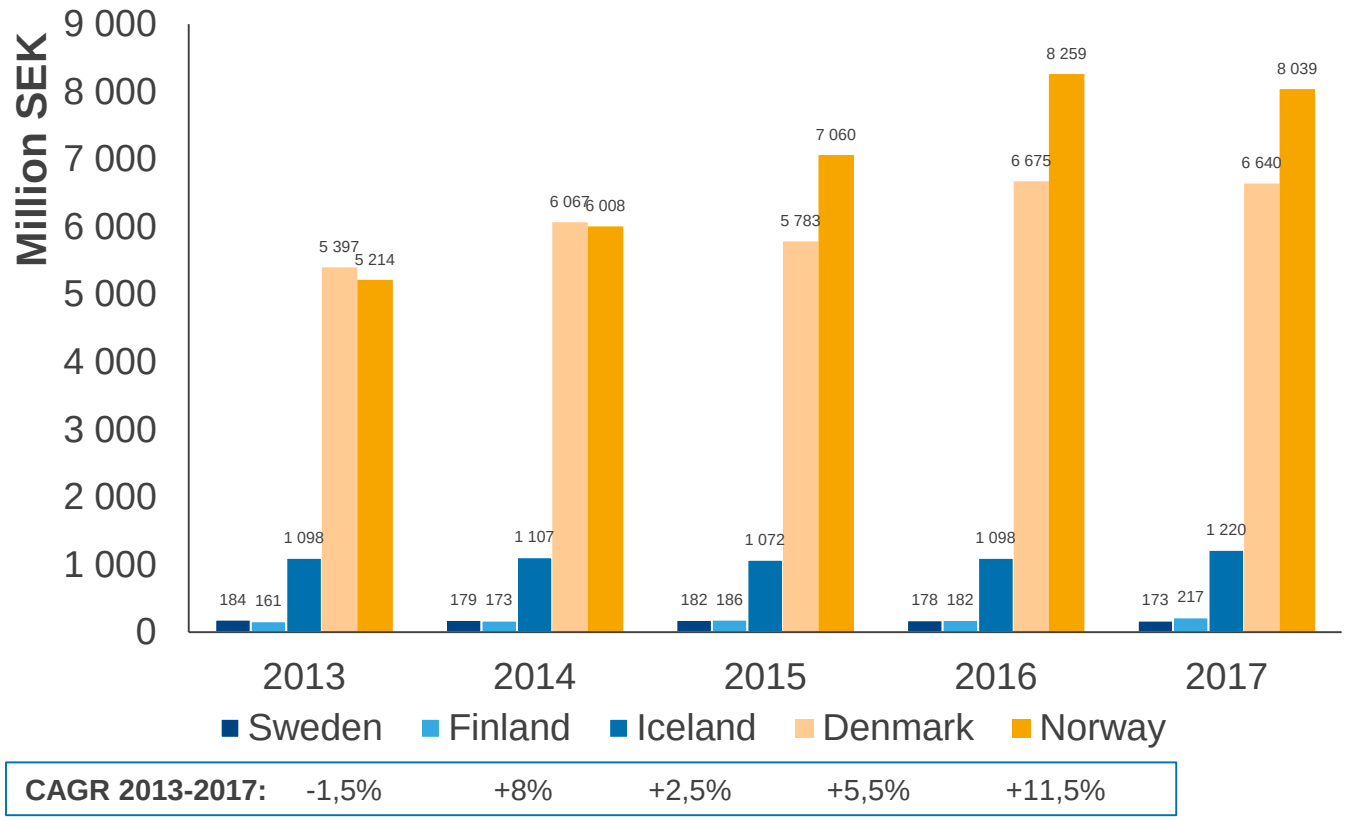


SOURCE: INTRACEN 2018

SIGNIFICANT NORDIC FOOD IMPORTS TO JAPAN

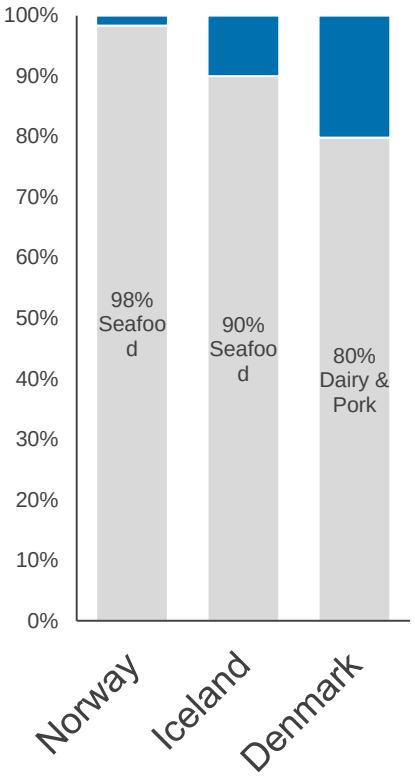
INDICATE LARGE UNTAPPED POTENTIAL FOR SWEDISH FOOD & DRINKS EXPORTERS

F&B IMPORTS FROM NORDIC COUNTRIES TO JAPAN 2013-2017 (VALUE)



CAGR 2013-2017:	-1,5%	+8%	+2,5%	+5,5%	+11,5%

IMPORT BREAKDOWN 2017

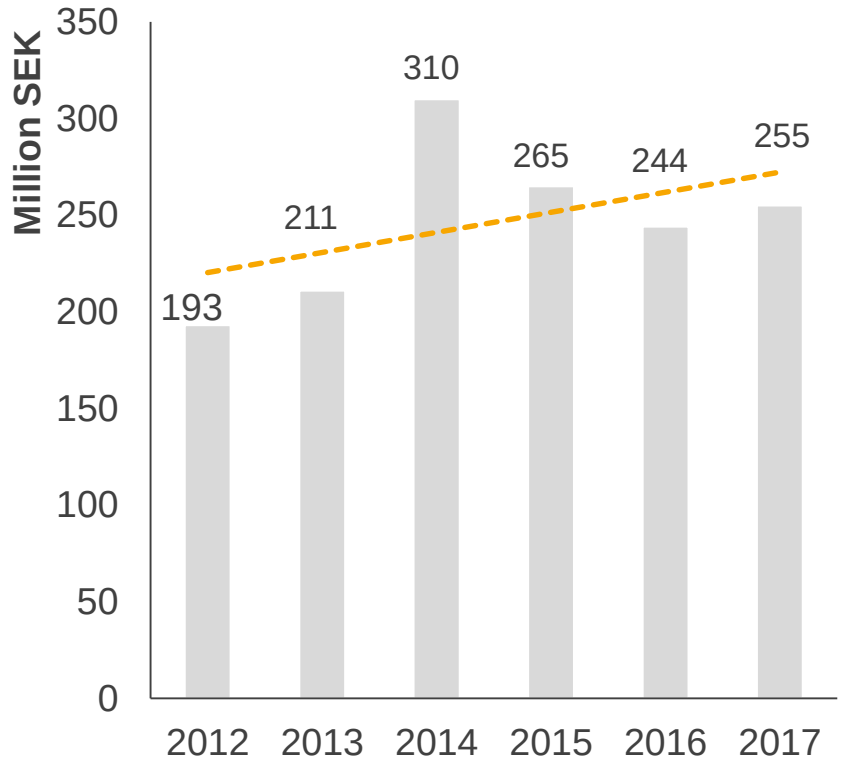


SOURCE: INTRACEN 2018, BUSINESS SWEDEN CALCULATION

LIMITED SWEDISH FOOD & DRINKS EXPORTS TO JAPAN

ECONOMIC PARTNERSHIP AGREEMENT WILL IMPROVE UNDERLYING CONDITIONS

SWE. FOOD & DRINKS EXPORTS TO JAPAN 2012-2017



SWEDISH FOOD & DRINKS SOLD IN JAPAN



UNDERLYING CONDITIONS FOR LIMITED EXPORTS – TARIFFS & REGULATION – WILL BE IMPROVED BY EPA

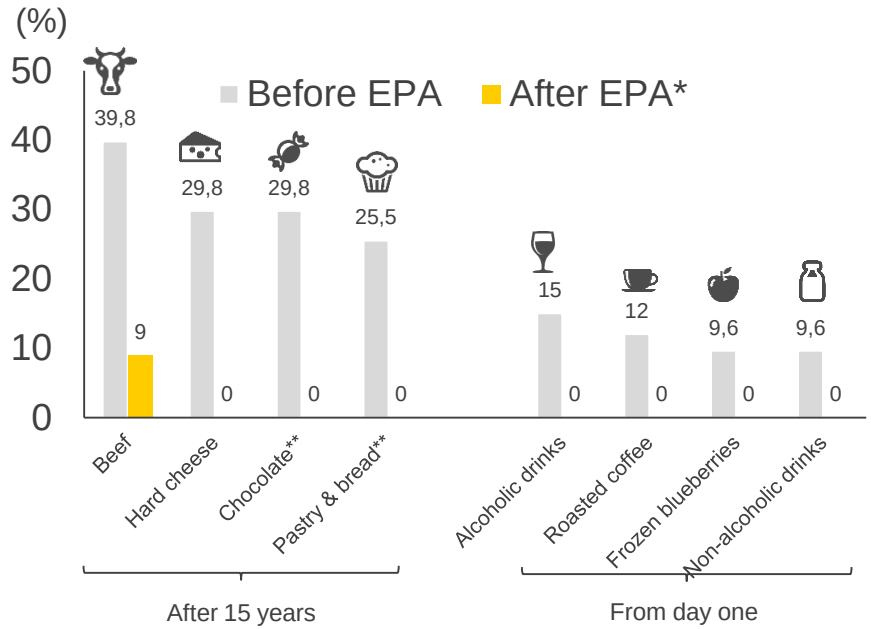
SOURCE: SWEDISH NATIONAL BOARD OF TRADE 2018

THE EU-JAPAN EPA WILL IMPROVE MARKET ACCESS

THE AGREEMENT IS EXPECTED TO BECOME PROVISIONAL FIRST HALF OF 2019

THERE ARE 2 MAIN ISSUES

1. High customs tariffs



2. Awkward rules

- **Simplified import procedure**
- **Increased harmonisation**
- **Increased cooperation**

*AFTER TARIFF ELIMINATION 0-15 YEARS. **HIGHEST APPLIED TARIFF FOR PRODUCT GROUP.

More information from the European Commission
More information from the Swedish National Board of Trade

FEASIBILITY ASPECTS OF FOOD EXPORTS TO JAPAN

PRIOR ASSESSMENT OF FEASIBILITY OF FOOD EXPORTS TO JAPAN RECOMMENDED

PRODUCT REGULATION

- **Q: What other requirements are needed to sell in Japan?**
  - Are food additives used approved in Japan?
  - What kind of testing & inspection is needed?
  - Labelling requirements etc.

RETAIL / SALES PRICE IN JAPAN

- **Q: Will the product price be competitive in the market?**
  - including freight cost, customs duty, VAT 8% (10% in Oct 2019), importer margin, retailer margin etc.
  - Could be part of the reason to limit the portion size, and / or to ship bulk to Japan and pack locally.

LOGISTICS & SHIPPING

- **Q: Is it feasible to ship the product to Japan?**
  - Shelf life / Expiry date considering approx. 2 months for sea freight (1-2 days for air freight)
  - Importers typically request 6-12 months shelf life after products arrive to Japan (depending on product)

LOCALIZATION & ADAPTION

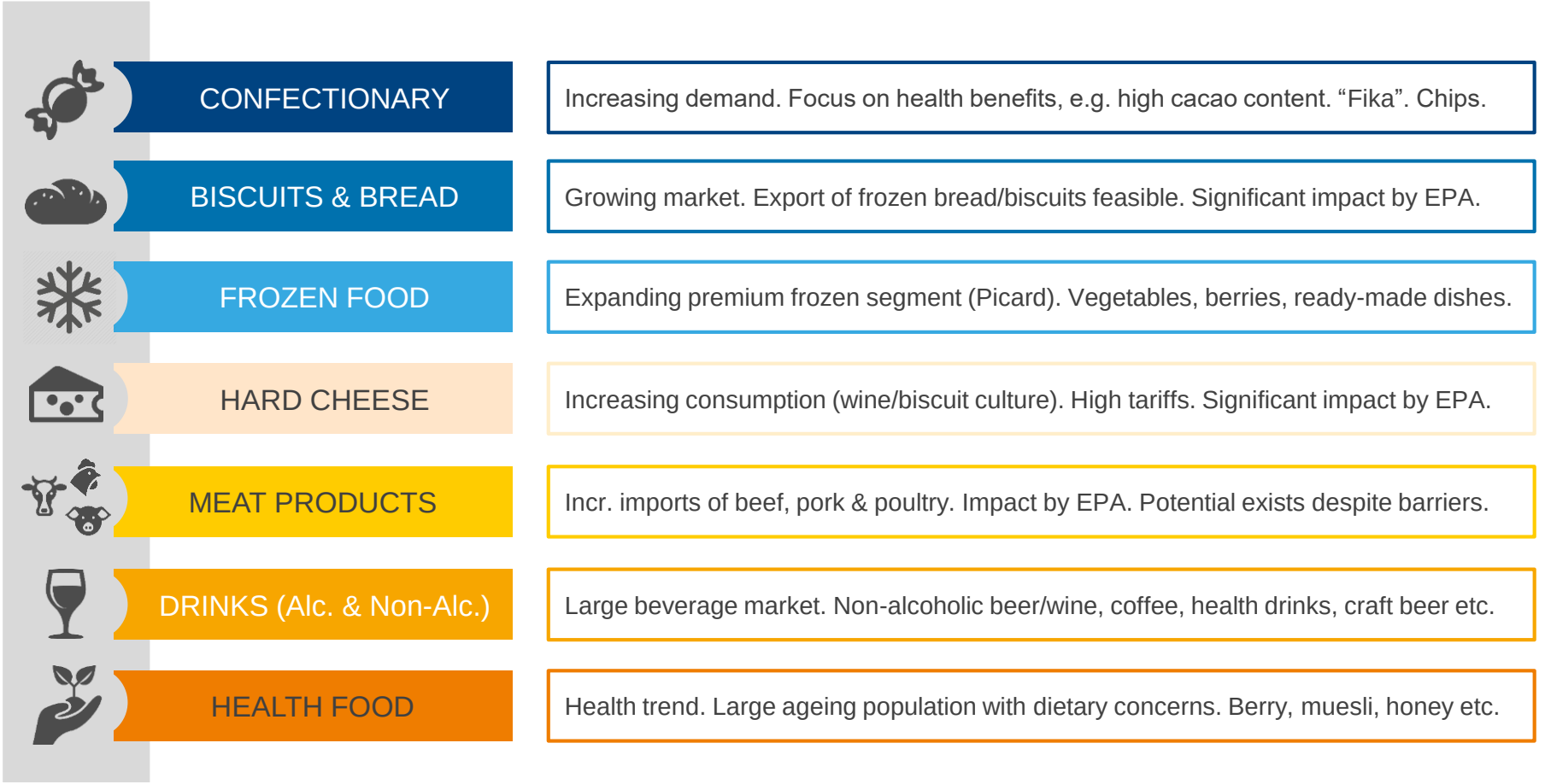
- **Q: Is the product adapted for the Japanese market?**
  - Consumer preferences
  - Purchasing behavior
  - Portion size
  - Packaging

ABOVE FACTORS MAKES IT DIFFICULT TO ENTER THE MARKET WITHOUT A STRONG LOCAL PARTNER

SOURCE: BUSINESS SWEDEN ANALYSIS

HIGH EXPORT GROWTH POTENTIAL SEGMENTS*

CAN BE CATEGORIZED AS: 1) PREMIUM/UNIQUE IMPORTED PRODUCTS, 2) PRODUCTS THAT JAPAN LACK OR ARE SHORT OF SUPPLY IN, AND 3) SOLUTIONS FOR FOOD SERVICE AND B2B MARKET



* BASED ON JAPANESE DEMAND, MARKET TRENDS, AND SWEDISH INDUSTRY MATCH

WE PLAN A SWEDISH PAVILION AT FOODEX JAPAN 2019 TO LAUNCH NEW SWEDISH FOOD BRANDS IN JAPAN

The 44th International Food and Beverage Exhibition

FOODEX JAPAN 2019

第44回 国際食品・飲料展

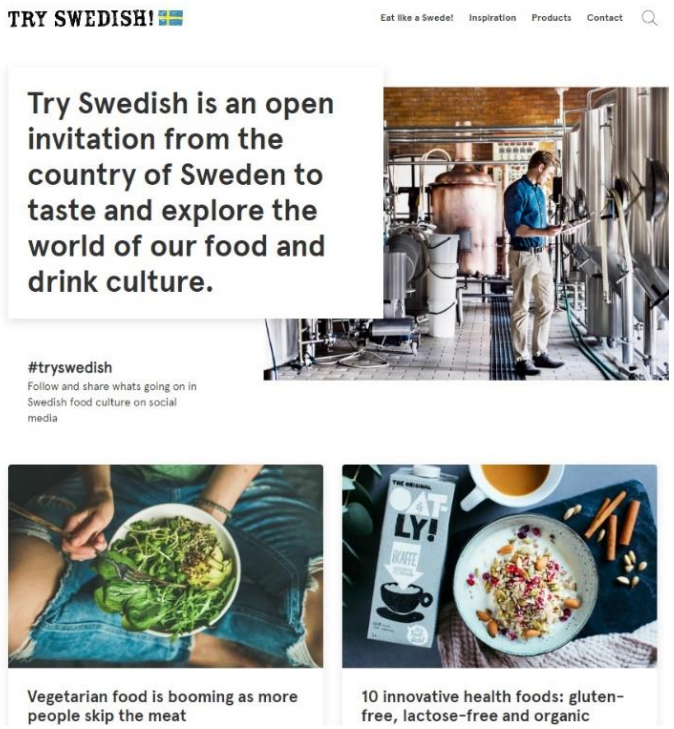


SWEDISH PAVILION DESIGN EXAMPLE LAYOUT



JOINT MARKETING ACTIVITIES AIM TO INCREASE EXPOSURE OF SWEDISH FOOD IN JAPAN

- “Try Swedish” website in and marketing campaign in Japanese.
- PR launch event in January 2019 to jointly market Swedish food and participating brands in the Japanese market.

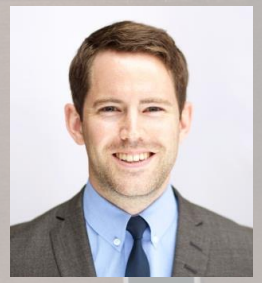




THE SWEDISH TRADE & INVEST COUNCIL

BUSINESS SWEDEN

BUSINESS SWEDEN TOKYO - “FOOD TEAM”



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Image credits: Magnus Skoglöf/imagebank.sweden.se

FOOD TRENDS & OPPORTUNITIES

USA

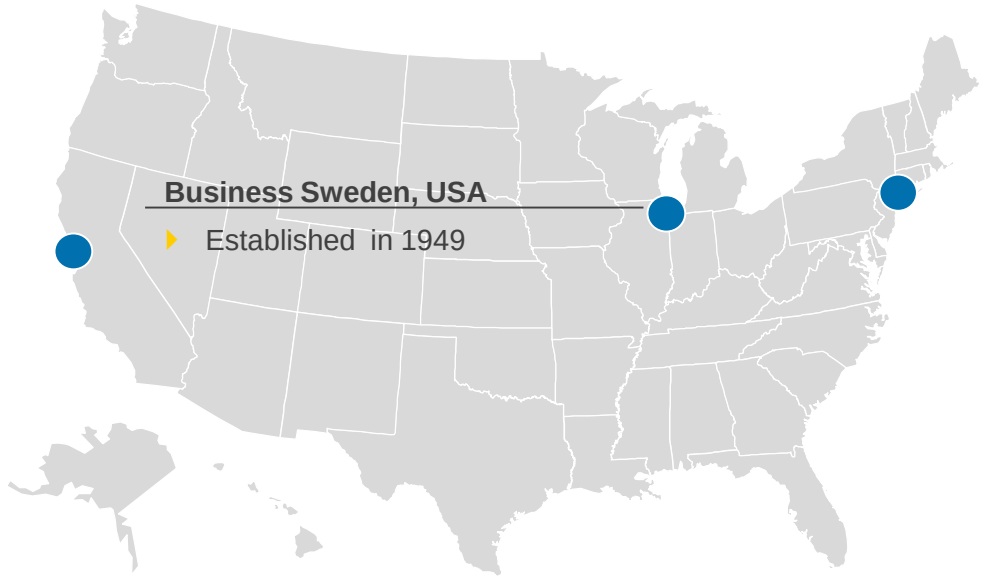


TRY SWEDISH!

AGENDA

- USA Overview
  - Tech Trends
  - Product Trends
- Try Swedish USA

BUSINESS SWEDEN USA HAS THREE OFFICES JOINTLY COVERING THE ENTIRE COUNTRY



San Francisco **Chicago** **New York City**

300+ Clients served annually

Responding to 6,000+ Inquiries annually

27 Growth consultants

Projects performed annually 150+

100+ Strategic investments to Sweden

3 Offices

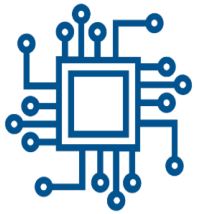
THE U.S. FOOD INDUSTRY IS BEING INFLUENCED MY TRENDS WITHIN BOTH PRODUCT INNOVATION & TECH

TECH TRENDS

THE AMAZON EFFECT



TECHNOFOODOLOGY



VERTICAL FARMING



PRODUCT INNOVATION

INNOVATIVE & PORTABLE PROTEIN



PLANT BASED



CLEAN LABELING



SOURCE: LA TIMES, FORBES, FOOD NAVIGATOR USA, FANCY FOOD SHOW, MINTEL

AGENDA

- USA Overview
  - Tech Trends
  - Product Trends
- Try Swedish USA

AMAZON IS DISRUPTING BOTH THE TRADITIONAL AND ONLINE FOOD INDUSTRY

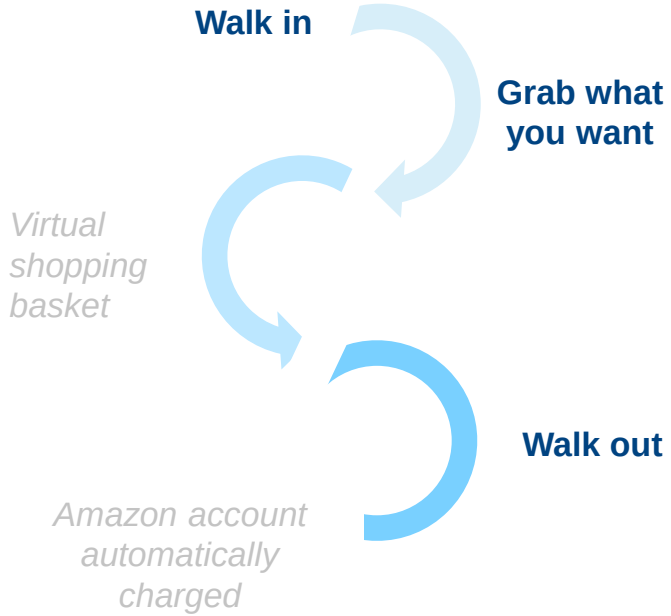


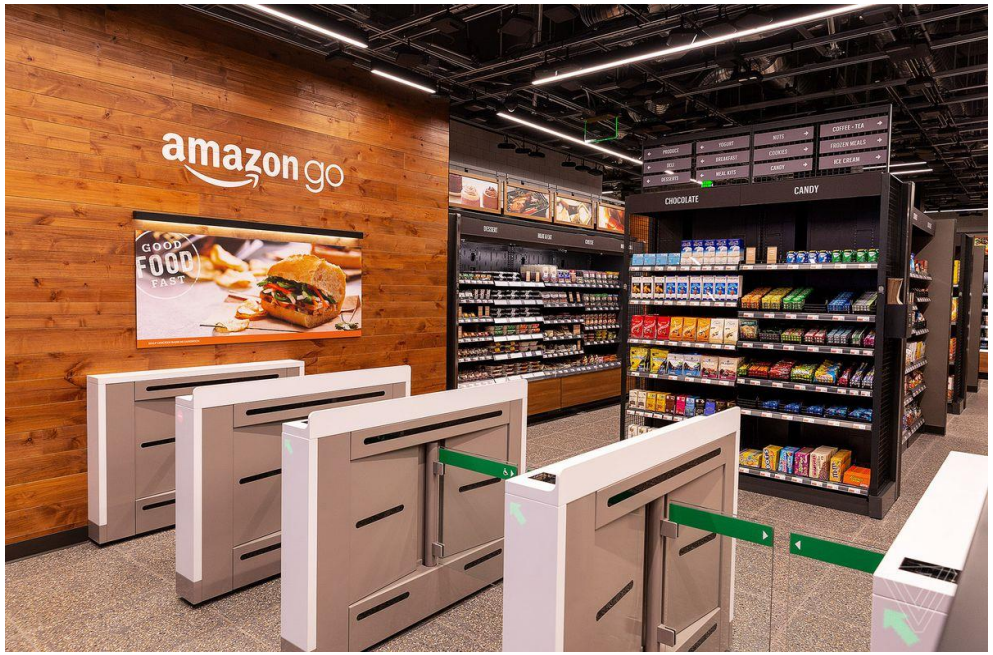
AMAZON'S IS STEERING THE WAY FOR THE FUTURE OF THE U.S. FOOD INDUSTRY

SOURCE: AMAZON, EUROMONITOR

AMAZON IS PLANNING TO LAUNCH THOUSANDS OF CASHIER FREE AMAZON GO STORES IN 2019

SHOPPING EXPERIENCE REINVENTED



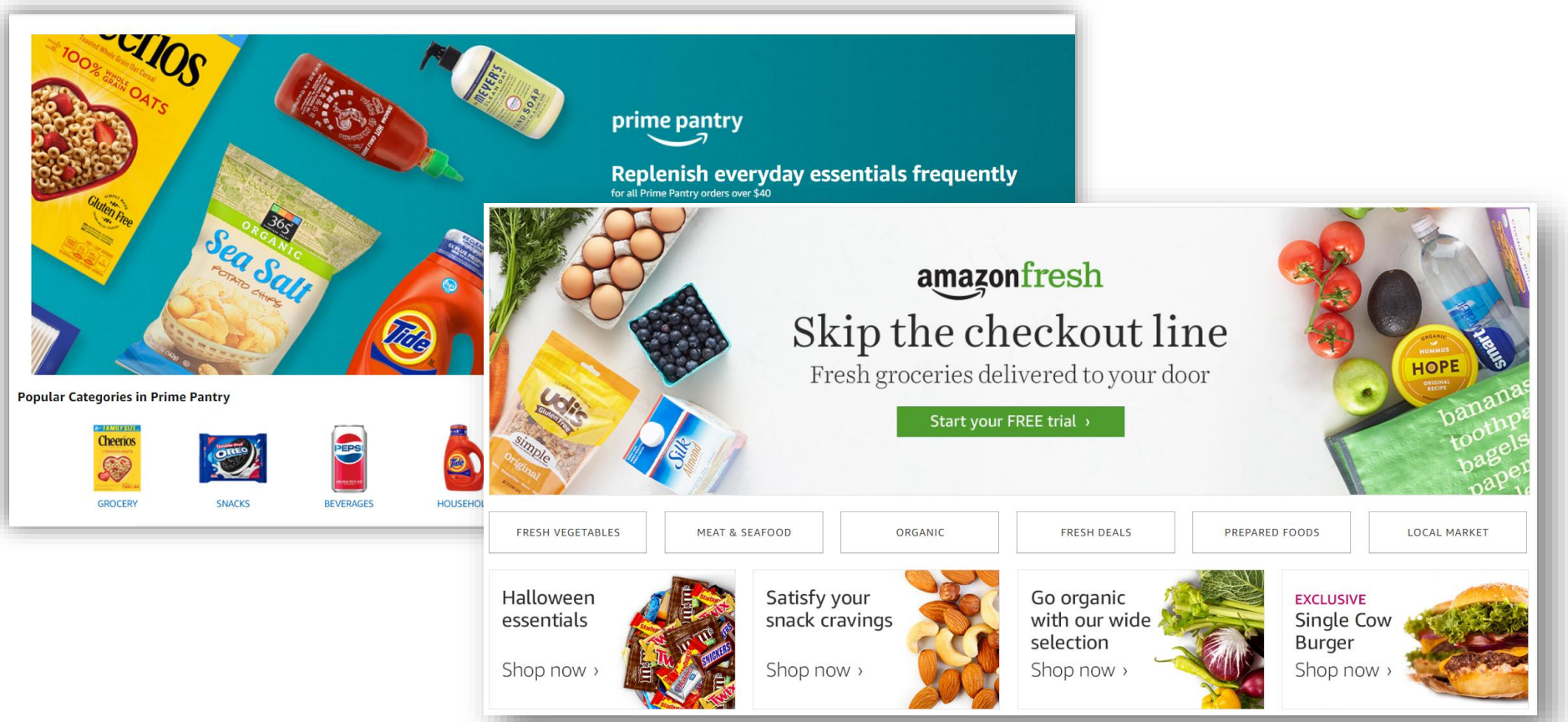


- Stores launched in San Francisco, Chicago and Seattle
- Thousands of additional stores planned for opening in 2019

AMAZON GO IS RESHAPING THE WAY CONSUMERS SHOP FOR GROCERIES WITHIN PHYSICAL STORES

SOURCE: THE WALL STREET JOURNAL, FITCH SOLUTIONS

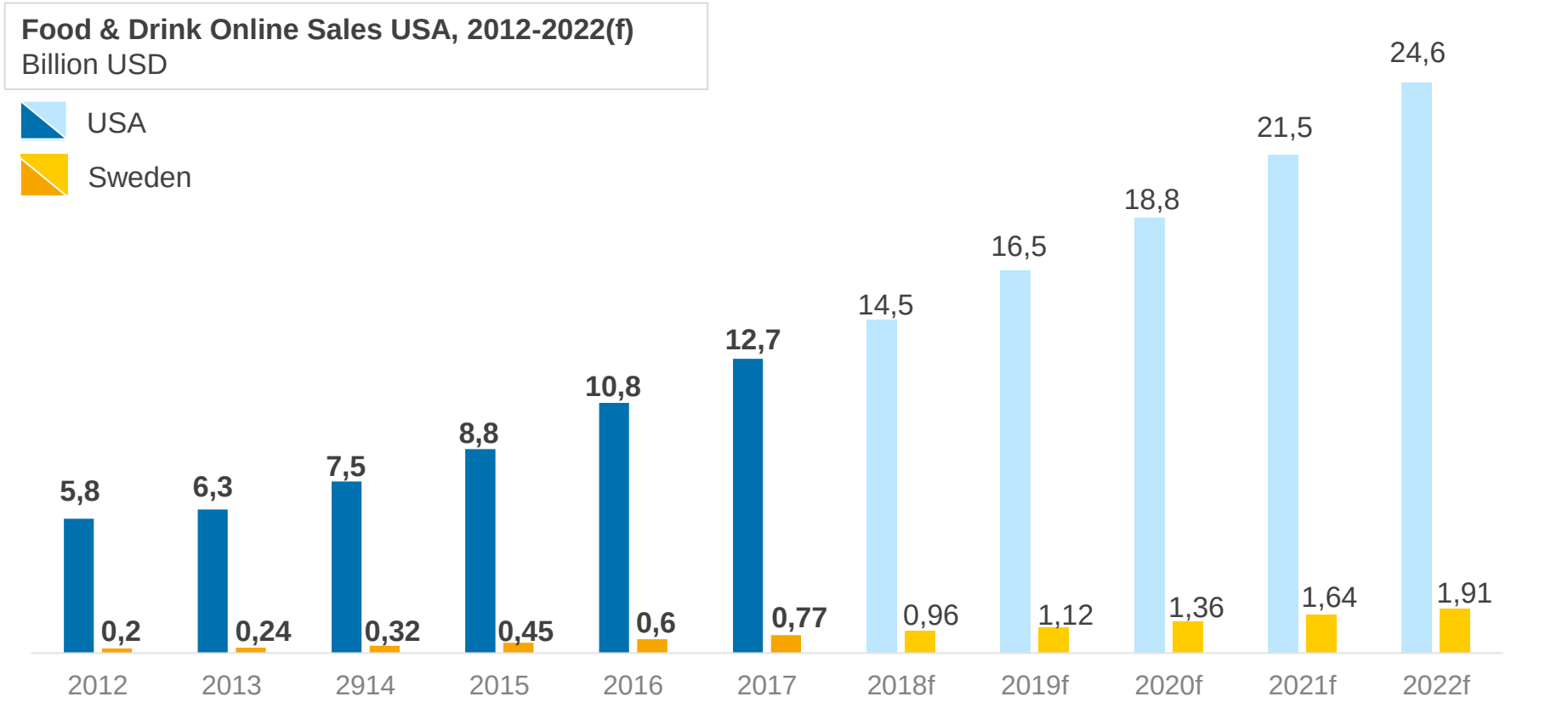
AMAZON FRESH AND PANTRY AIMS TO COMPETE WITH THE LEADING U.S. GROCERY RETAILERS



MAJOR RETAILERS HAVE BEEN FORCED TO LAUNCH E-COMMERCE SOLUTIONS DUE TO AMAZON TO STAY COMPETITIVE

SOURCE: AMAZON

THE U.S. MARKET FOR ONLINE GROCERIES IS 16X LARGER THAN SWEDEN



THERE ARE MANY INTERESETING DEVELOPMENTS WITHIN THE U.S. E-COMMERCE SPACE FOR FOOD IN THE U.S.

SOURCE: EUROMONITOR

THERE ARE DIFFERENT MODELS FOR ONLINE GROCERY SHOPPING IN THE U.S.

Click-and-Collect

Place order online, pick up in store

- Currently, 25% of grocery retailers offer click and collect services
- 75% of Americans state that they would choose this selection to avoid delivery fees



Delivery

Place order online, groceries delivered to your doorstep

- Today, U.S. food retailers must have a delivery option in place in order to stay competitive
- Some retailers are using internal delivery models, while others use external providers such as Instacart



Direct-to-Fridge

Place order online, groceries delivered directly to your fridge

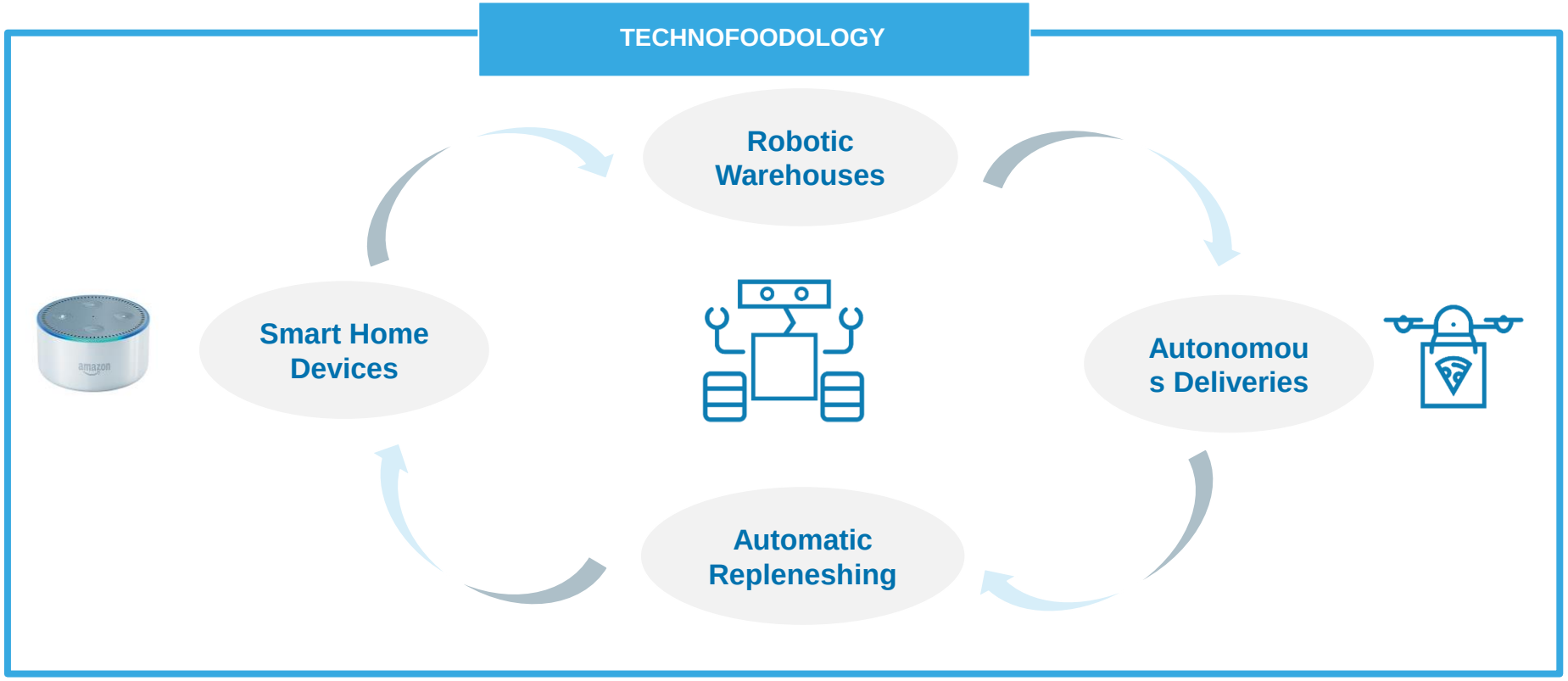
- Amazon and Walmart have tried this new model, with mixed reactions from customers who are hesitant of having strangers enter their homes, although the number of stolen packages would drop
- Likely to see this option more in the future as customers get used to the concept (similar to AirBnB & Uber)



CLICK-AND-COLLECT AND DOORSTOP DELIVERIES ARE CURRENTLY THE MOST POPULAR CHOICES

SOURCE: EUROMONITOR

ARTIFICIAL INTELLIGENCE AND THE INTERNET OF THINGS ARE DIGITALIZING FOOD PURCHASING



BY 2020 ALL COMBINED SMART HOME DEVICES WILL REPRESENT THE BIGGEST SUPERMARKET IN THE WORLD

SOURCE: FOOD MARKETING INSTITUTE

VERTICAL FARMING MAY SUPPLY GROCERY STORES WITH LOCALLY GROWN CROPS ALL YEAR ROUND







THE TECHNOLOGY

- Vertically stacked crops grown in rural areas, relying on **electronic sensors** that ensure that the right amount of LED light, heat, and nutrients are supplied to the crops
- **AeroFarms** and **Plenty** are expected to become U.S. market leaders
- U.S. Department of Agriculture supports this development
  - $182 MUSD funding available for research and projects

THE BENEFITS

Year-round growing capabilities	Less pesticides
Improved crop predictability	Weather independent
Local food consumption	Minimized water consumption







THE U.S. DEPARTMENT OF AGRICULTURE IS PROVIDING FUNDING FOR EXPANDED RESEARCH ON VERTICAL FARMING

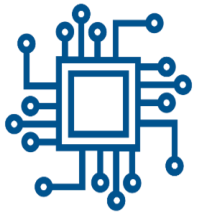
SOURCE: TECHCRUNCH, U.S. DEPARTMENT OF AGRICULTURE, STANFORD SOCIAL INNOVATION REVIEW

THE FUTURE OF THE FOOD INDUSTRY WILL BE HEAVILY INFLUENCED BY TECHNOLOGY

THE AMAZON EFFECT



TECHNOFOODOLOGY



VERTICAL FARMING



FOOD INDUSTRY OF THE FUTURE

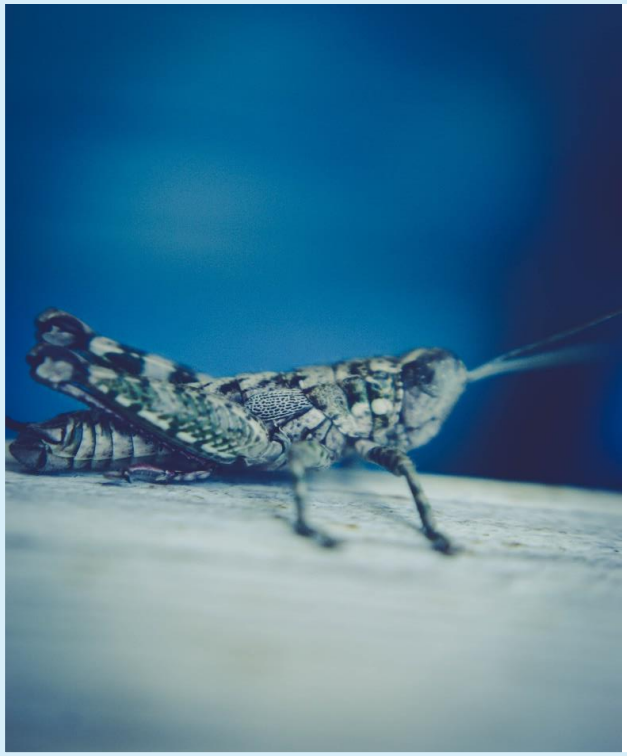
- **Purchasing process –** primarily online via smart devices, grocery stores focused on the experience and artisan products
- **Artificial intelligence and the Internet-of-Things –** automatic grocery shopping and replenishment
- **Local, sustainable farming practices –** farming in urban centers

SOURCE: LA TIMES, FORBES, FOOD NAVIGATOR USA, FANCY FOOD SHOW, MINTEL

AGENDA

- USA Overview
  - Tech Trends
  - Product Trends
- Try Swedish USA

U.S. CONSUMERS ARE DEMANDING MORE PROTEIN RICH SNACK OPTIONS



INNOVATIVE & PORTABLE PROTEIN

- Demand for **protein rich on-the-go snacks** is rising among U.S. consumers
- Producers turning to **unconventional protein sources**, such as insects
- U.S. Food and Drug Administration **(FDA) has officially announced that crickets are safe to eat** as a natural protein source
- Aspire Food Group has built the **first U.S. commercial scale insect farm** in Austin, Texas

U.S. RETAILERS ARE ADDING MORE PLANT BASED PRODUCT LINES TO MEET CONSUMER DEMAND

SOURCE: CHAPUL, EXO, FORBES, FOOD NAVIGATOR USA, FANCY FOOD SHOW, MINTEL

AMERICAN CONSUMERS ARE ADJUSTING TO UNCONVENTIONAL PROTEIN SOURCES

INNOVATIVE & PORTABLE PROTEIN



Chapul
Cricket Flour Protein Powder



EXO
Cricket Protein Bar



Aspire Food Group
Cricket Flour & Roasted Crickets

CRICKET PROTEIN POWDER, PROTEIN BARS AND ROASTED CRICKETS IS AVAILABLE AT WHOLEFOODS

SOURCE: CHAPUL, EXO, FORBES

VEGANISM IS GROWING RAPIDLY AMONG AMERICANS

PLANT BASED

- **Veganism is growing in the U.S.**
  - In 2017 6% of Americans followed a vegan diet, compared to 1% in 2014
- **One third** of U.S. consumers plan to **buy more plant based** food next year
- New plant based cheeses, meats and milk products are being introduced such as Vegan BBQ, peanut milk, and chickpea protein

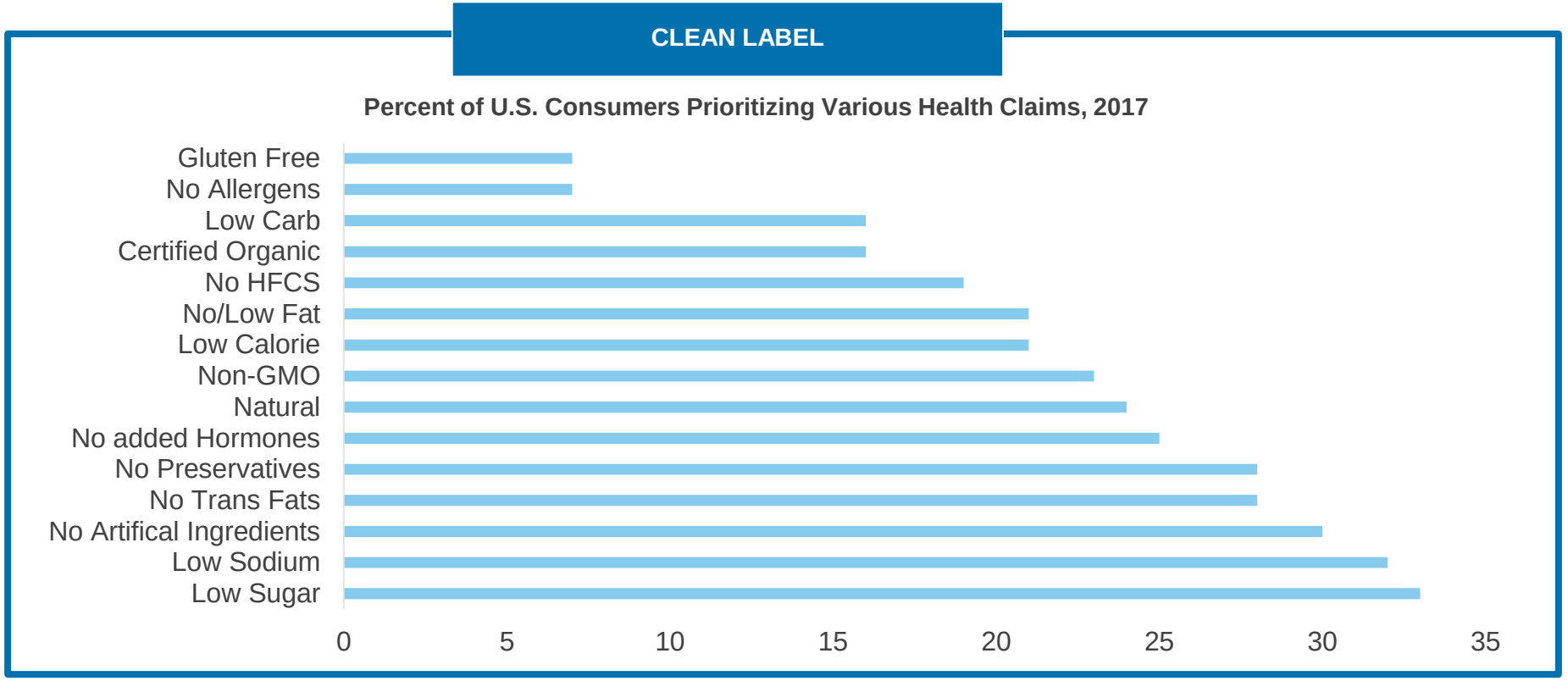


ALMOST 20 MILLION AMERICANS FOLLOW A VEGAN DIET AND EXPECTED TO INCREASE

SOURCE: LA TIMES, FORBES, FOOD NAVIGATOR USA, FANCY FOOD SHOW, MINTEL

CERTAIN HEALTH CLAIMS ARE PRIORITIZED BY U.S. CONSUMERS WHEN BUYING GROCERIES

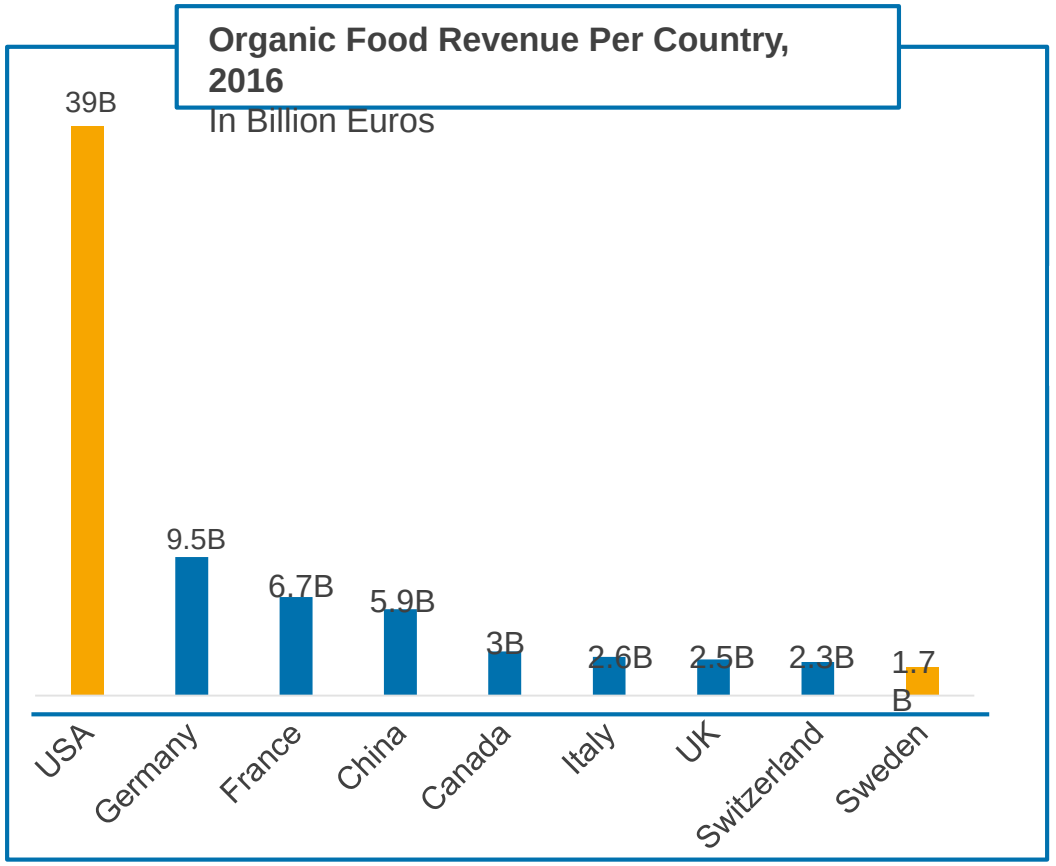
CLEAN LABEL



LOW SUGAR, SODIUM, AND NO ARTIFICIAL INGREDIENTS, TRANS FATS OR PRESERVATIVES ARE IN DEMAND

SOURCE: FOOD MARKETING INSTITUTE

THE U.S. REPRESENT ALMOST HALF OF TOTAL ORGANIC FOOD SALES GLOBALLY



- **Organic food sales in the U.S. make up 46% of worldwide revenue,**
- **Dairy, bakery, and ready meals** present the largest organic product categories in the U.S.
- The process for Swedish companies with EU organic status to **obtain U.S. organic certification** according to USDA standards is **relatively straightforward**

THE U.S. MARKET FOR ORGANIC FOOD IS OVER 20 TIMES LARGER THAN SWEDEN'S

SOURCE: STATISTA, USDA

AGENDA

- USA Overview
  - Tech Trends
  - Product Trends
- Try Swedish USA

BUSINESS SWEDEN HAS DEVELOPED AN FDA HANDBOOK SPECIFICALLY FOR SWEDISH COMPANIES



THE REPORT CAN BE DOWNLOADED ON BUSINESS SWEDEN'S WEBSITE

BUSINESS SWEDEN USA IS PLANNING A TRY SWEDISH PAVILION AT EXPO WEST IN MARCH, 2019



*The booth illustrated in the picture is from a previous Try Swedish pavilion – the design for Expo West can differ

Natural Products EXPO WEST®

- Anaheim, CA
- March 5-9th, 2019
- 85,000+ industry attendees
- 3,500+ exhibiting companies

ONE BOOTH IS STILL AVAILABLE, CONTACT US FOR MORE INFORMATION

THANK YOU!

Therése Dalebrant
Try Swedish Lead USA
Therese.Dalebrant@business-sweden.se

NADA – THE LOW BARRIER MARKET

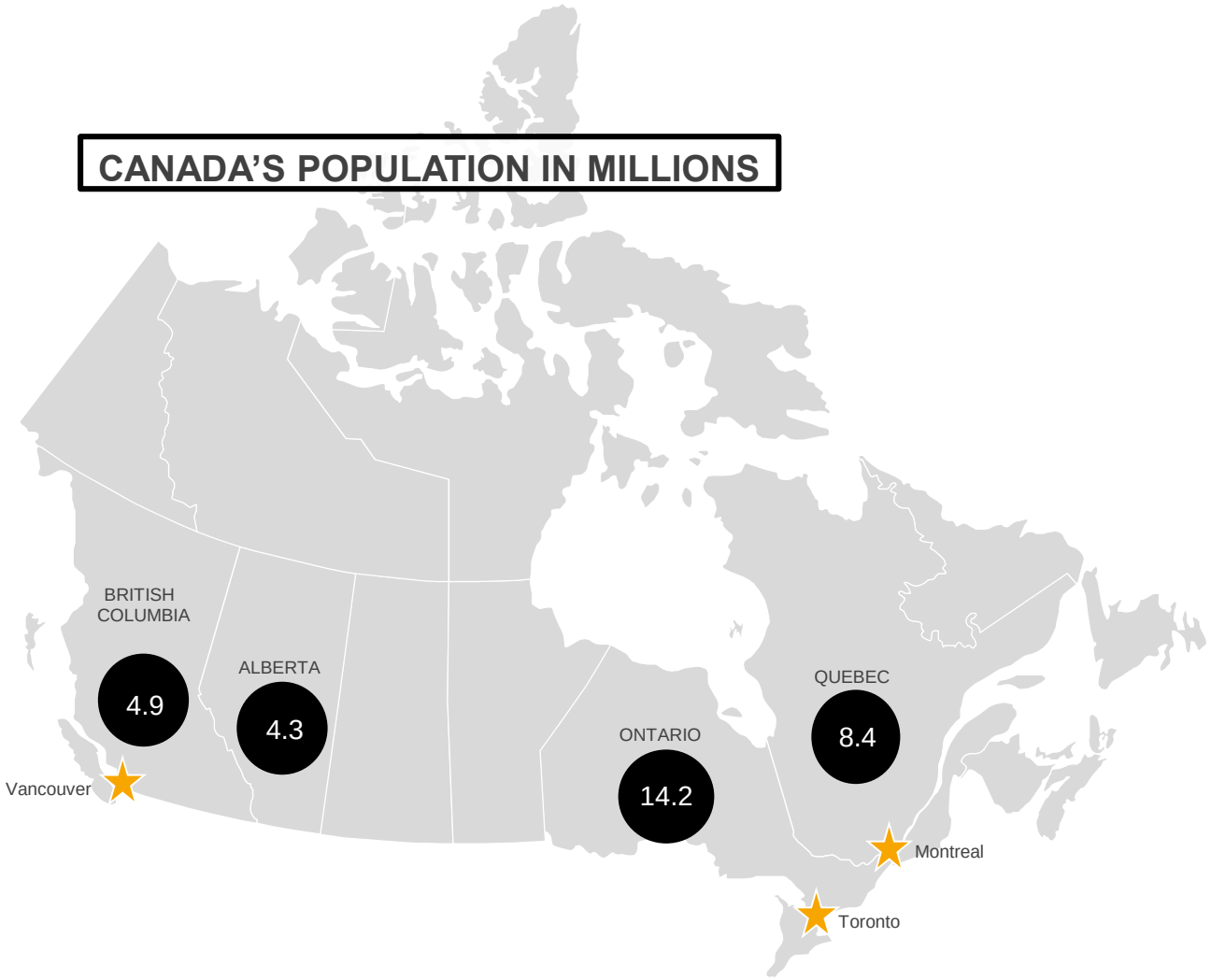


Takeaways

1. **Convivence, Health & Value**
2. **Easy Business**
3. **CETA-Free Trade**

RCE: ALI YAHYA

RISING POPULATION AND DISPOSABLE INCOME



37 Million inhabitants toal

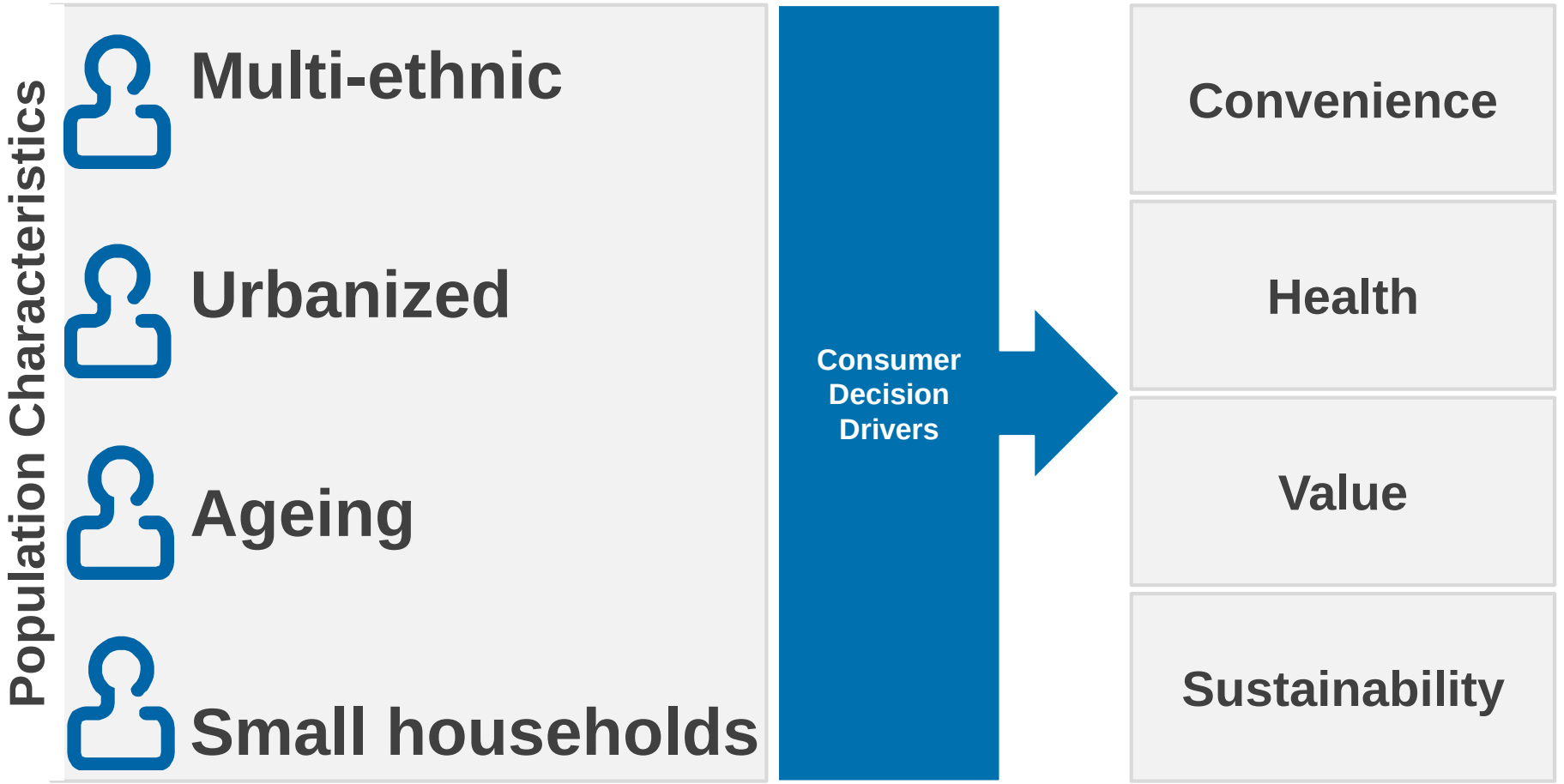
French & English

Six times zones

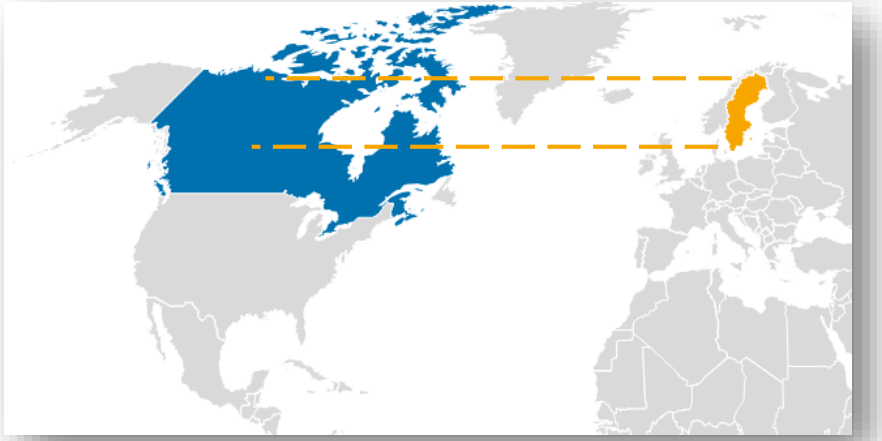
Provincially driven

21% Foreign born

CHANGING DEMOGRAPHIC IMPACT THE CONSUMERS



THERE ARE MANY SIMILARITIES BETWEEN SWEDEN AND CANADA, DESPITE HUGE DIFFERENCE IN SIZE



CULTURAL AND INDUSTRIAL SIMILARITIES













SOURCE: IMF, CIA, EMBASSY OF CANADA IN SWEDEN

IT IS EASY DOING BUSINESS IN CANADA

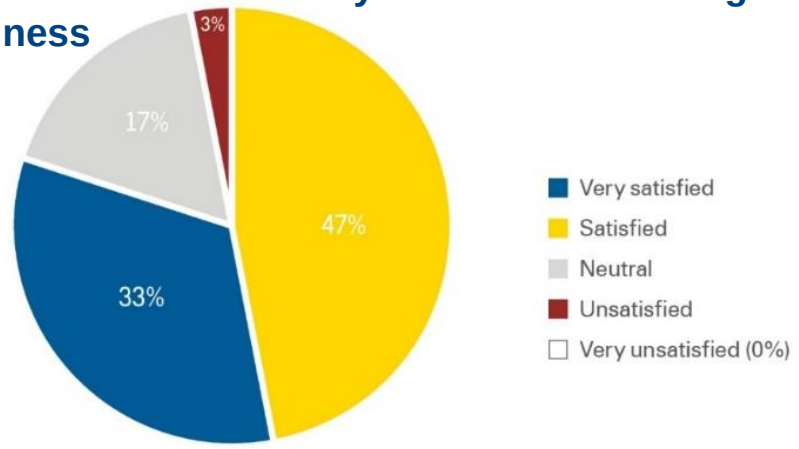
2018 INTERNATIONAL RANKINGS

#2
Best Countries Starting a Business
–The World Bank

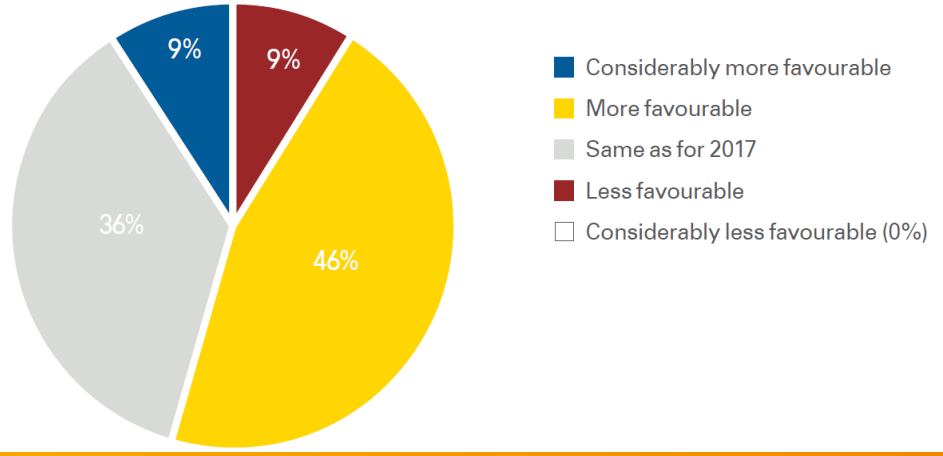
#5
Best Countries for Business
– Forbes Magazine

Swedish subsidiaries´ view doing business in Canada 2018

8/10 are satisfied or very satisfied with doing business



9/10 believe business climate will improve or stay the same



Source: Business Climate Survey Canada 2018, Forbes, the World Bank

CANADA'S RETAIL MARKET HAS LARGE DOMINANT PLAYERS LIKE SWEDEN



Supermarkets

ICA

coop

Hemköp



Supermarkets

Loblaws

Sobeys

metro

Retail Highlights

- Similar retail landscape to Sweden
- The online sale of grocery
- Discounters grown their market
- Carrying fees and shelfing fees

Discounters

Walmart

COSTCO WHOLESALE

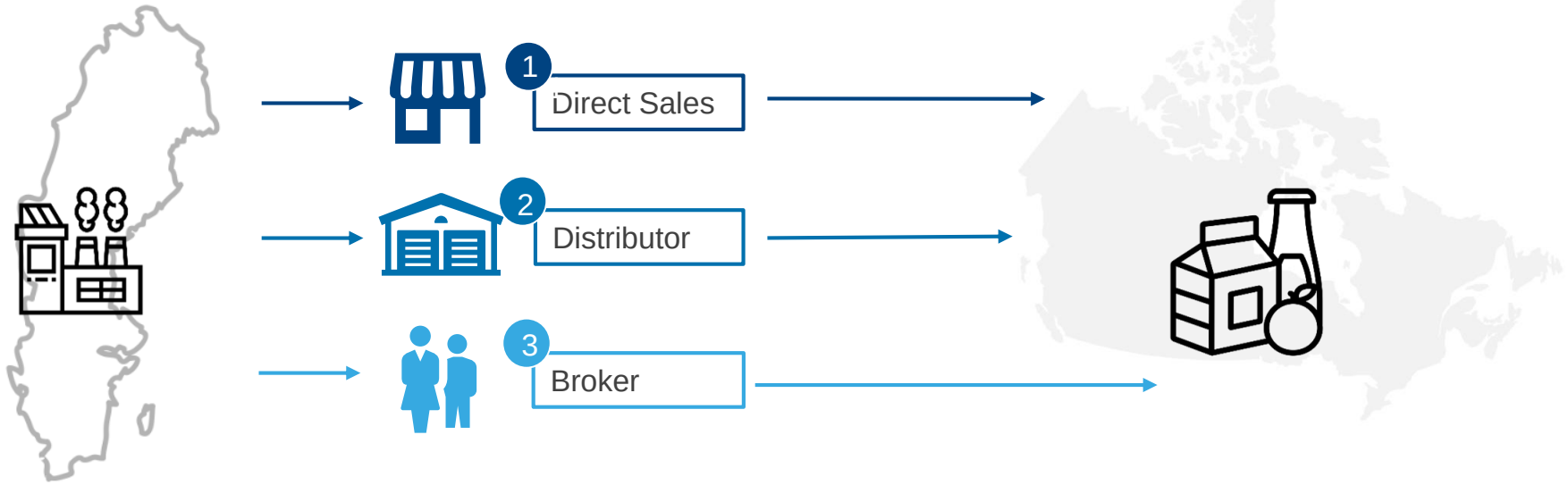
POTENTIAL TO GROW SWEDISH BRAND PRESENCE



SOURCE: BUREAU VAN DIJK'S ORBIS * BUSINESS SWEDEN EXPERIENCE

FINDING A CANADIAN PARTNER IS THE TYPICAL WAY TO ENTER THE MARKET

Typical Entry Strategies



SOURCE: INTERVIEWS BY BUSINESS SWEDEN TORONTO OFFICE

HIGHEST POTENTIAL SECTORS













ORGANICS ARE AN EASY IMPORT

No additional certification

May display the Canadian and/or EU Organic logos

Name of the organic EU certification body

Accompanied by an organic certificate

Website: Equivalency Agreement
Website: EU Organic Control Authorities



ORGANICS ARE BEING DEMANDED

Main reasons Canadians buy organic:

1. Reducing their exposure to pesticides - 48%
2. Being good for the environment - 36%
3. Non-Genetically modified - 34%
4. Having strong standards - 30%

Weak Regulation

“Non-GMO”

- The organic food market in Canada has more than tripled since 2006
- Millennials buying 83% of organic food and beverage
- 66% of Canadians buy at least one organic product every week

SOURCE: ORGANIC TRADE ASSOCIATION, BUSINESS DEVELOPMENT BANK CANADA

CETA – FREE TRADE CREATES OPPORTUNITY

CETA Examples

	Before	After
Chocolate:	6%	0%
Candy:	9,5%	0%
Fruit juice:	11%	0%
Caviar:	3%	0%
Fish sticks:	7%	0%
Gingerbread:	3%	0%

- Almost all F&B have dropped tariffs to 0%
- Doesn't include milk, eggs, meat and poultry

Tariff-Rate Quota (TRQ)

- Limited Quantities on EU imports

Examples:

- Cheese
- Dog Food
- Confectionery

- 2018 schedule not utilized in full

CANADA – THE LOW BARRIER MARKET

Takeaways

1. Convivence, Health & Value
2. Easy Business
3. CETA-Free Trade



PHOTO: VANCOUVER, CANADA

ANY QUESTIONS?
CONTACT US

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FOOD EXPORT PORTAL SOUTHEAST ASIA PROGRAMME

EXPORT DAYS

6 November 2018
Business Sweden



PHOTO CREDIT: SARA INGMAN/IMAGEBANK.SWEDEN.SE

CONTENT

- Background on Southeast Asia
- Food programme
- Route-to-market
- Next steps

THE SOUTHEAST ASIA F&B MARKET IS SUBSTANTIAL WITH GOOD OPPORTUNITIES FOR SWEDISH PRODUCERS



01 *Overview of Southeast Asian F&B market*

- Total population of 641 million, of which 48% are concentrated in urban areas
- US$ 459 billion F&B sales in 2017, with projected CAGR of 9.2% until 2022
- US$ 38 billion worth of food products by value imported to SEA in 2016

02 *Fit for Swedish products*

- High value, premium-positioned products has increasing appeal to SEA markets, especially urbanites
- Increasing trend for healthy, natural, and organic products which is a Swedish strength and key to differentiate
- Higher preference towards convenient, ready-to-consume food and beverages, with smaller package size

03 *Market expansion to Southeast Asia*

Based on the analysis conducted, there are general recommendations that food producers can take when considering their expansion to Southeast Asia

- Short-term expansion to Singapore, Malaysia and Thailand and long-term expansion to Indonesia, Philippines and Vietnam
- Consider product potential fit which takes various factors into account
- This should be customized to individual companies and based on existing foot print, ambition level and internationalization strategy

SOURCE: BUSINESS SWEDEN ANALYSIS AND INTERVIEWS

SOUTHEAST ASIA'S POPULATION OF 647 MILLION CONSUMERS PROVIDE A SUBSTANTIAL MARKET BASE



THAILAND

Population: 69 million
GDP; growth: 455 BUSD; 3.9%
GDP per capita: 6,594 USD

MALAYSIA

Population: 32 million
GDP; growth: 315 BUSD; 5.9%
GDP per capita: 9,945 USD

SINGAPORE

Population: 6 million
GDP; growth: 324 BUSD; 3.6%
GDP per capita: 57,714 USD

VIETNAM

Population: 96 million
GDP; growth: 224 BUSD, 6.8%
GDP per capita: 2,343 USD

PHILIPPINES

Population: 105 million
GDP; growth: 314 BUSD; 6.7%
GDP per capita: 2,989 USD

INDONESIA

Population: 264 million
GDP; growth: 1,016 BUSD; 5.1%
GDP per capita: 3,847 USD

SOURCE: WORLD BANK

NOTE: ALL FIGURES ARE FOR 2017, GDP IN CURRENT USD VALUE

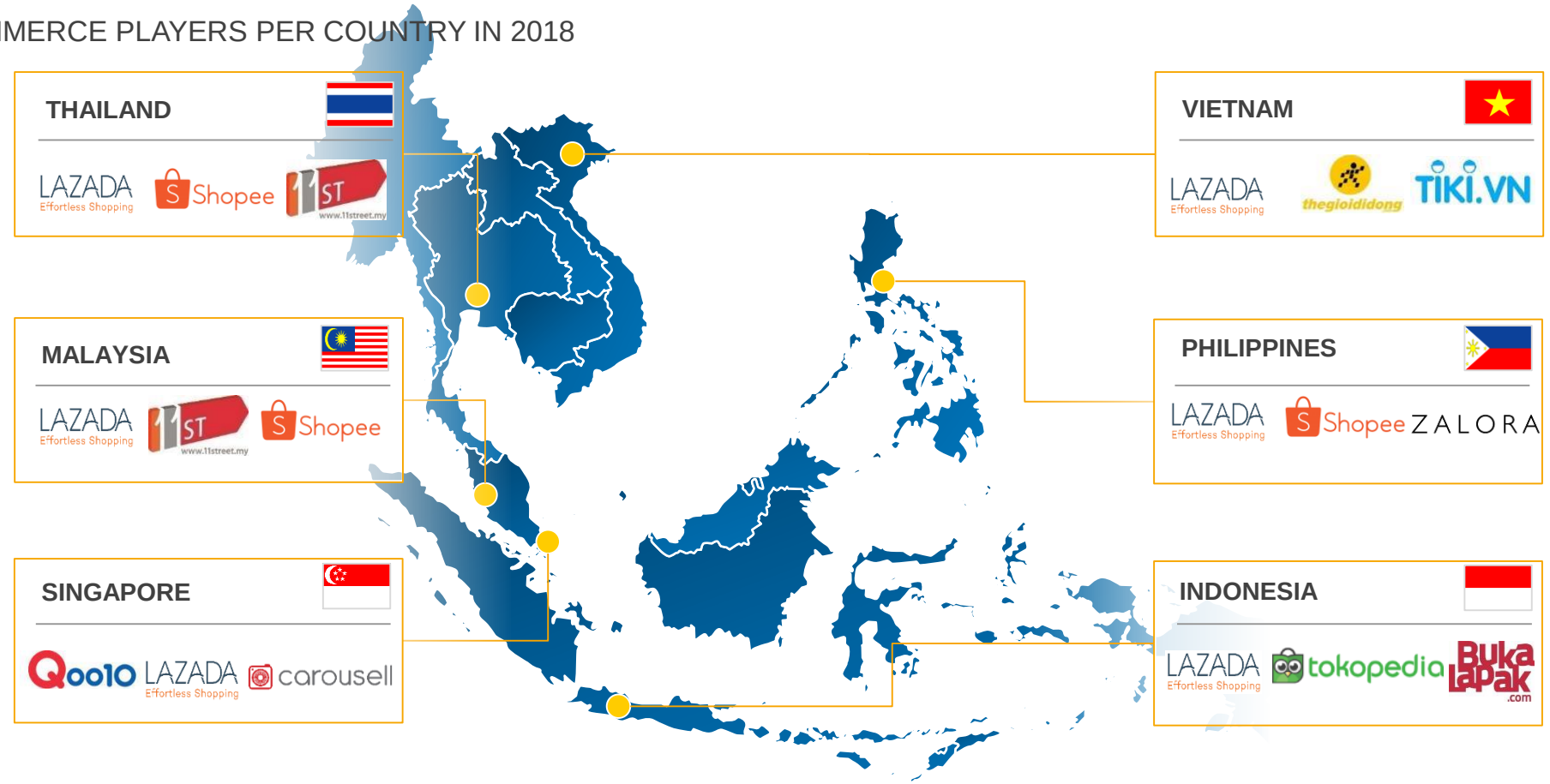
SOUTHEAST ASIA IS A HETEROGENEOUS REGION THAT IS INCREASING IN MATURITY



SOURCE: WORLD BANK, EUROMONITOR, NIELSEN, BUSINESS SWEDEN ANALYSIS

AS E-COMMERCE TAKES OFF IN THE REGION, SPEED OF ACCESS TO CONSUMERS WILL CHANGE THE LANDSCAPE

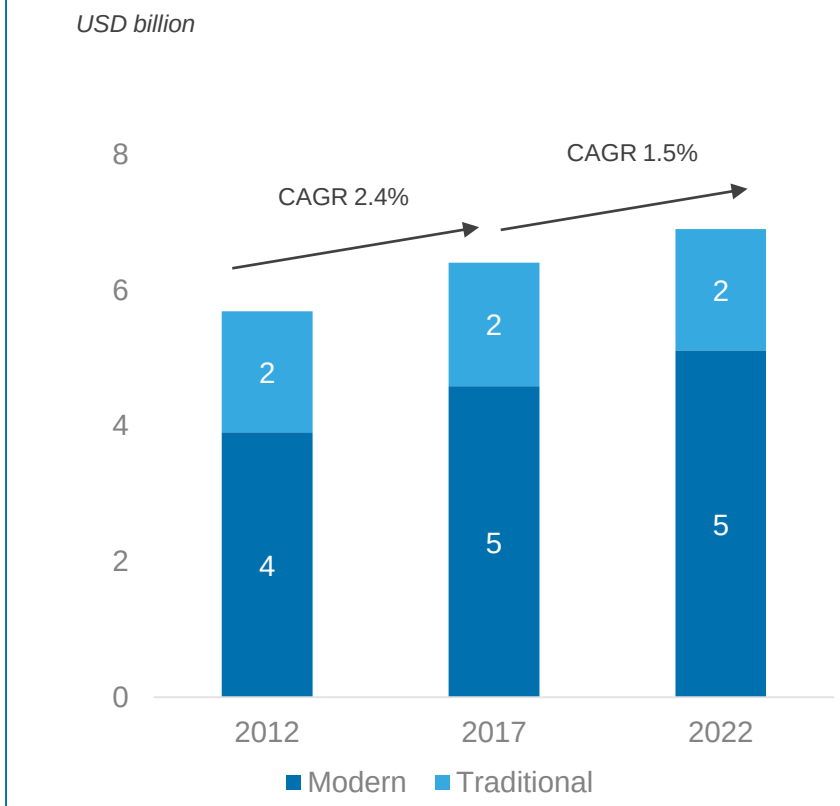
TOP 3 E-COMMERCE PLAYERS PER COUNTRY IN 2018



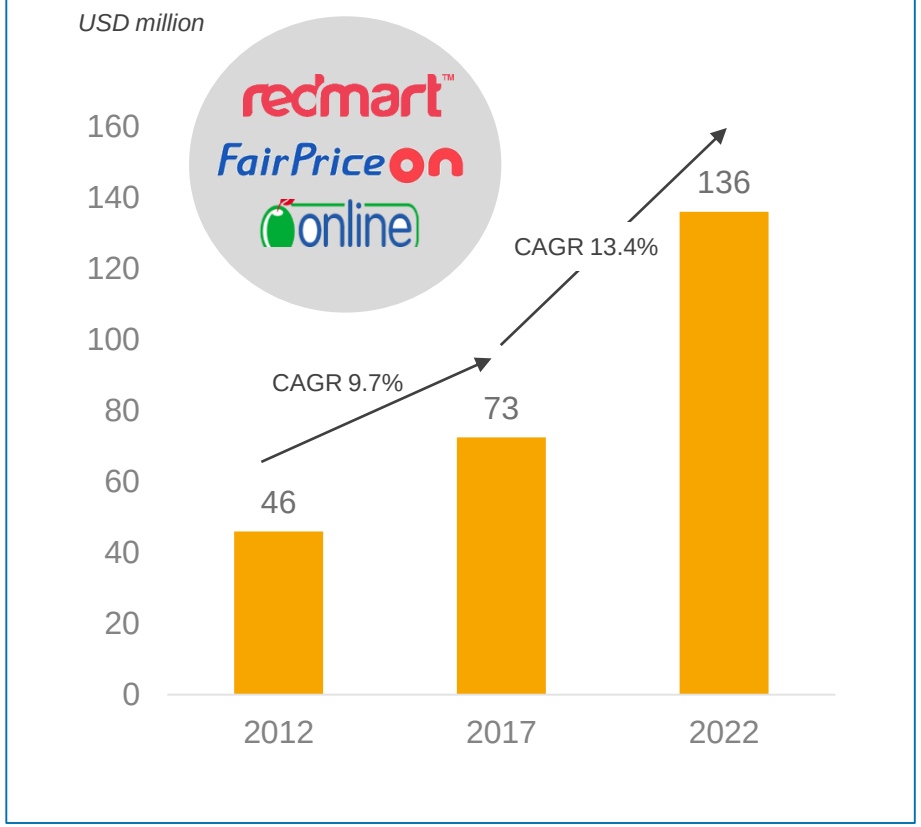
SOURCE: ASEANUP, VIETNAM E-COMMERCE IQ

SINGAPORE WILL LEAD THE WAY IN SOUTHEAST ASIA IN THE CHANGING LANDSCAPE OF INTERNET RETAIL

STORE-BASED GROCERY RETAILING



FOOD AND BEVERAGE INTERNET RETAILING

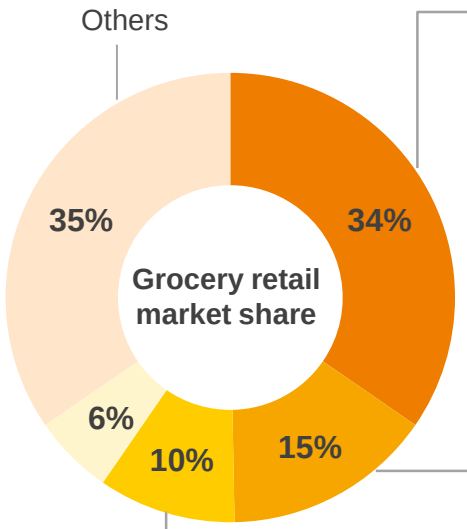


SOURCE: EUROMONITOR, BUSINESS SWEDEN ANALYSIS AND INTERVIEWS

NOTE: MODERN GROCERY RETAILERS INCLUDE CONVENIENCE STORES, FORECOURT RETAILERS, HYPERMARKETS, AND SUPERMARKETS. TRADITIONAL GROCERY RETAILERS INCLUDE FOOD SPECIALIST, INDEPENDENT SMALL GROCERS, AND WET MARKETS.

AROUND 65% OF GROCERY RETAILER MARKET SHARE IS HELD BY THE TOP 4 PLAYERS

MARKET SHARE OF GROCERY RETAILERS IN SINGAPORE



FairPrice

- Operates 140 outlets comprising Fairprice supermarkets, Fairprice Finest and Fairprice Xtra
- Fairprice Finest, now with 20 outlets, is the fastest growing type of supermarket
- Although it sources most of its stocks from local distributors, NTUC Fairprice also purchases or imports directly from manufacturers

Dairy Farm

- The Dairy Farm group is the second largest group of retailers comprising Jason's or Marketplace, Cold Storage chains, Giant hypermarkets, and 7-Eleven convenience stores
- Dairy Farm Group's customers tend to be the least price conscious and a range of organic and wellness food area is made available in-store

SHENGSIONG ... all for you!

- Operates 44 supermarkets in Singapore
- Targets mass market consumers who tend to be more price-conscious
- Purchases from producers and local importers

SOURCE: BUSINESS SWEDEN ANALYSIS AND INTERVIEWS, COMPANY WEBSITES, EUROMONITOR

SWEDISH BRANDS ARE PRESENT ON THE MARKET AND THERE IS POTENTIAL FOR MANY MORE COMPANIES

EXAMPLE OF SWEDISH FOOD AND BEVERAGE PRODUCTS IN SOUTHEAST ASIA

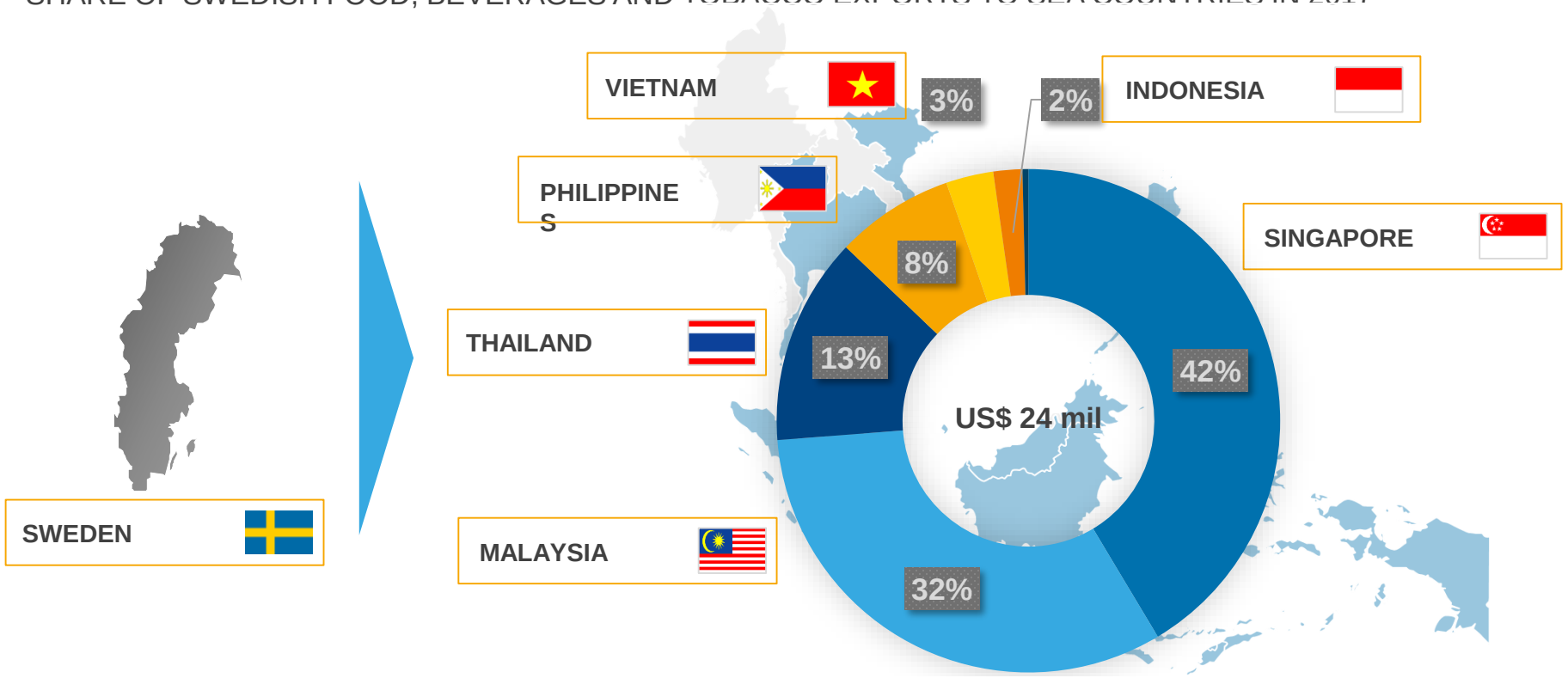


CONTENT

- Background on Southeast Asia
- Food programme
- Route-to-market
- Next steps

SWEDISH FOOD, BEVERAGE & TOBACCO EXPORTS TO SOUTHEAST ASIA REACHED US$24MIL IN 2017

SHARE OF SWEDISH FOOD, BEVERAGES AND TOBACCO EXPORTS TO SEA COUNTRIES IN 2017

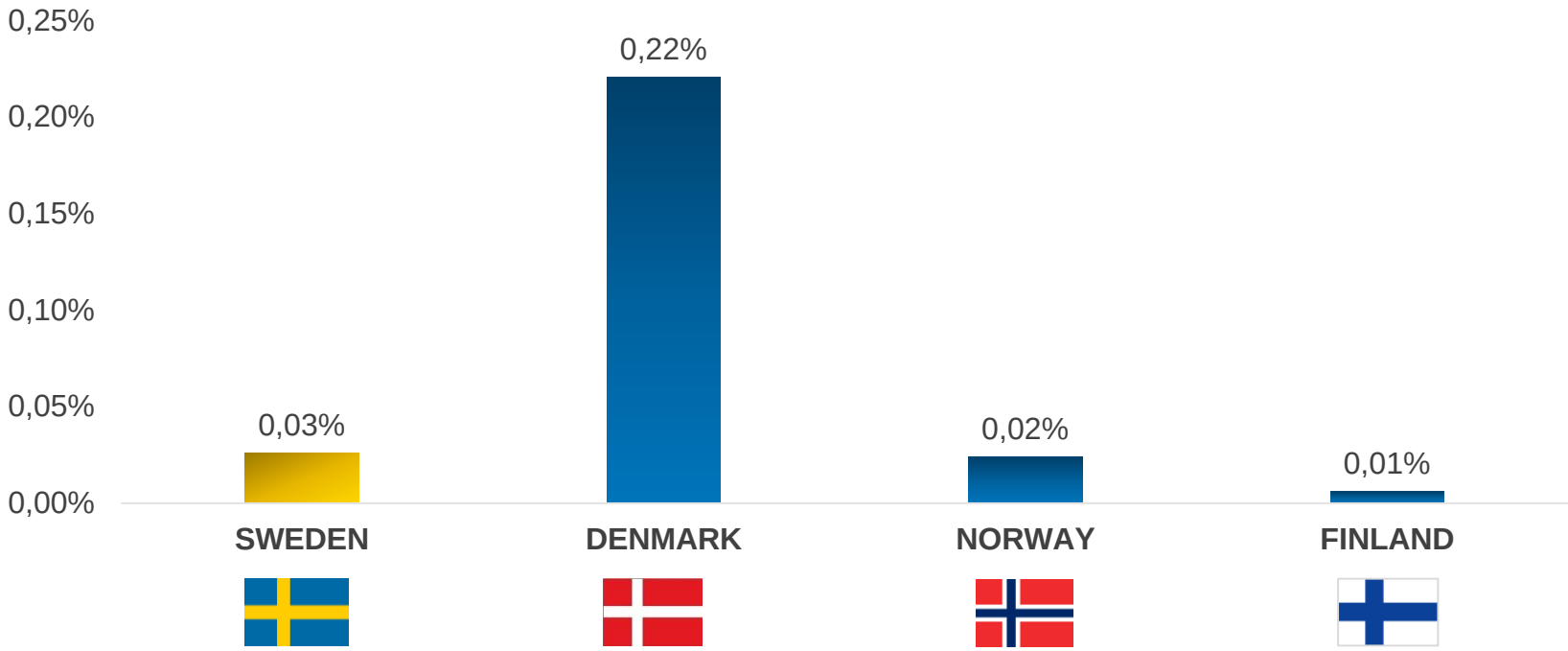


87% OF SWEDISH F&B AND TOBACCO EXPORT VALUE TO SEA IS TO 3 SINGAPORE, MALAYSIA AND THAILAND

SOURCE: STATISTICS SWEDEN

FOOD PRODUCTS FROM SWEDEN HAS POTENTIAL TO GROW WHEN BENCHMARKED TO NORDIC COUNTRIES

SHARE OF SEA FOOD PRODUCTS IMPORTS FROM NORDIC COUNTRIES IN 2016 *



DENMARK HAS A SIGNIFICANT LEAD IN FOOD IMPORTS DESPITE SHARING SIMILAR DISTANCES AND VALUE PROPOSITION

SOURCE: WORLD INTEGRATED TRADE SOLUTION

THE SHARE REPRESENT FOOD PRODUCTS CATEGORY ACCORDING TO THE WORLD INTEGRATED TRADE SOLUTION

SWEDISH FOOD AND BEVERAGE PRODUCTS ARE A GREAT FIT WITH REGIONAL TRENDS

STRENGTHS

- Sweden brings a positive perspective and commands respect in sustainability and quality
- Swedish food products are strong in organic and has differentiated points to target niche value market
- Swedish food industry has strong marketing and storytelling, are agile and entrepreneurial

WEAKNESSESS

- Geographic distance of Sweden from Asian markets presents a challenge to perishable food
- The Swedish food industry has a low familiarity of the Southeast Asian markets
- Low awareness of Swedish food and beverage products in the market



OPPORTUNITIES

- Growing and dynamic market with favourable trends such as urbanization, increasing disposable income provides a concentrated market for Swedish food products
- With increased travel and health consciousness, there is more openness to imported and differentiated food products and innovative packaging

THREATS

- Regional competitors is closer to the market as compared to Swedish food manufacturers
- Navigating the regulatory and retail environment presents an unfamiliar territory for companies not already present in the region

SOURCE: BUSINESS SWEDEN RESEARCH AND ANALYSIS

USINESS SWEDEN SUPPORTS SWEDISH COMPANIES BY INCREAS CCESS AND REDUCING HURDLES



Develop overall understanding of consumer trends



Establish relations with major importers and retailers on the market



On-going regulatory hotline support for Swedish companies



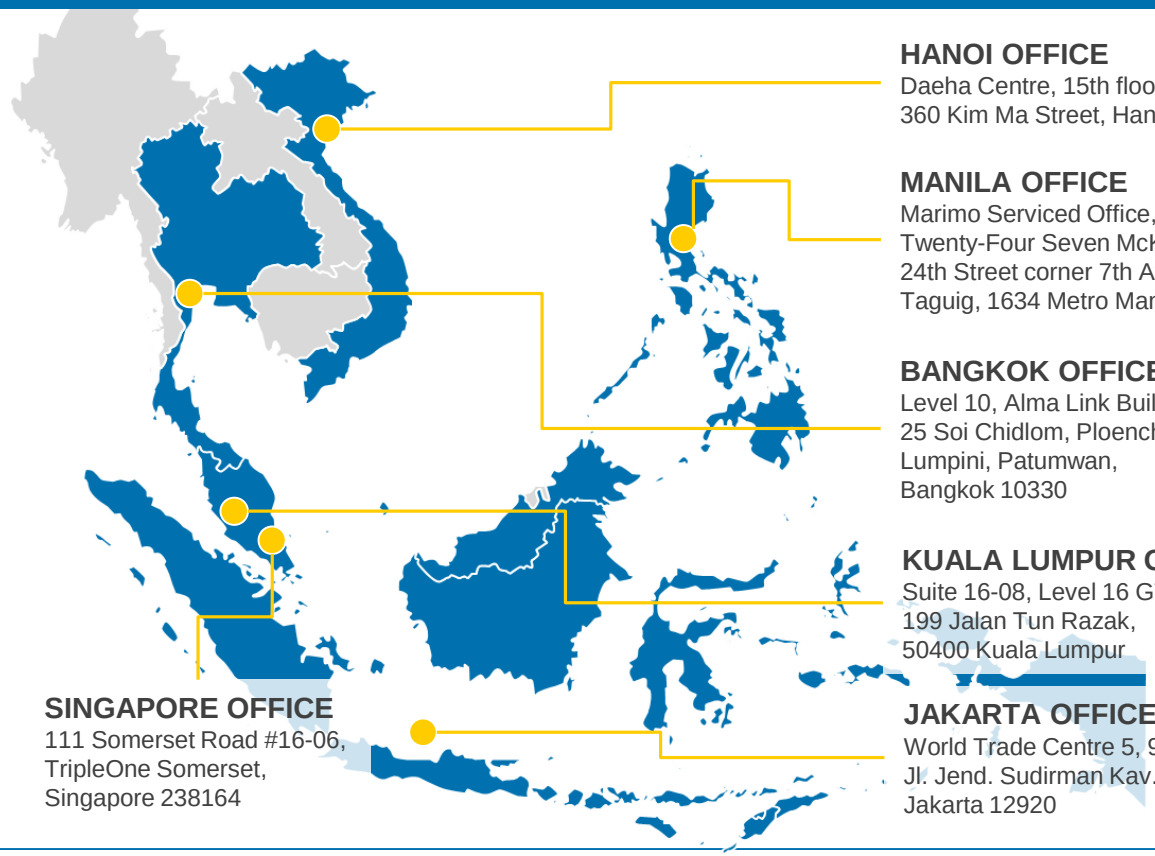
Understand ways to access the right partners and channels on the market

BUSINESS SWEDEN SUPPORTS SWEDISH COMPANIES FROM 6 OFFICES ACROSS SOUTHEAST ASIA

BUSINESS SWEDEN'S OFFICES IN SOUTHEAST ASIA



SWEDEN



HANOI OFFICE
Daeha Centre, 15th floor,
360 Kim Ma Street, Hanoi

MANILA OFFICE
Marimo Serviced Office, 26th Floor,
Twenty-Four Seven McKinley,
24th Street corner 7th Avenue, BGC,
Taguig, 1634 Metro Manila

BANGKOK OFFICE
Level 10, Alma Link Building,
25 Soi Chidlom, Ploenchit Road,
Lumpini, Patumwan,
Bangkok 10330

KUALA LUMPUR OFFICE
Suite 16-08, Level 16 GTower,
199 Jalan Tun Razak,
50400 Kuala Lumpur

SINGAPORE OFFICE
111 Somerset Road #16-06,
TripleOne Somerset,
Singapore 238164

JAKARTA OFFICE
World Trade Centre 5, 9th Floor,
Jl. Jend. Sudirman Kav. 29-31,
Jakarta 12920

FOOD BUSINESS DAYS TO SINGAPORE 2018 PROVIDED MARKET UNDERSTANDING AND NETWORKS

SWEDISH COMPANIES REPRESENTED

Nordic Fine Food – Rich Nordic Flavours

Orkla

Pågen

SWE CHEESE

PAULIG FOODS























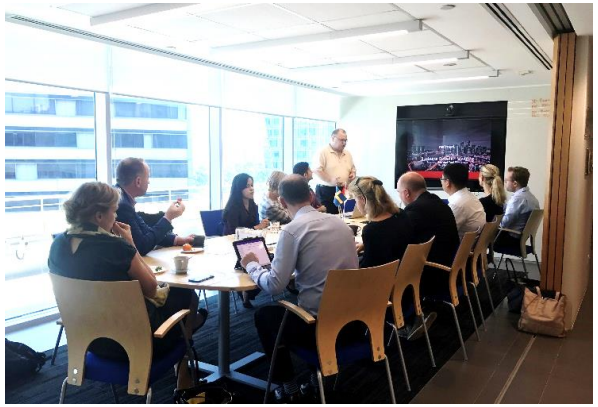
MEETINGS

FairPrice
Cheers
Warehouse Club
FairPrice Xtra
FairPrice express
Dairy Farm
7 ELEVEN
Market Place – A Whole New Supermarket Experience
Cold Storage – The fresh food people
Jason's – The Gourmet Grocer – Since 1973 – Fine Food and Wine
redmart
Direct Wholesale – Transforming Wholesale Trade
DAWOOD
Rogue Merchants
Kaiser
FOOD – For food that's good.
PacificWest

ALL-ROUND PROGRAMME PROVIDES ACCELERATED INROADS INTO THE MARKET

GAIN MARKET INSIGHTS





BROADEN NETWORKS





FIND NEW CHANNELS





CONTENT

- Background on Southeast Asia
- Food programme
- Route-to-market
- Next steps

USINESS SWEDEN SUPPORTS SWEDISH COMPANIES BY INCREAS CCESS AND REDUCING HURDLES



- Companies can take advantage of the opportunities in Southeast Asia by establishing a strong foothold especially in mature markets with higher relative ease of entry such and expand to other geographies
- Broaden market access channels to include both retail and food service to maximize the potential opportunities that the market offers
- A direct establishment or appointing a suitable local partner can accelerate efforts to grow

- Major retailers represent gatekeepers to many end customers and can be excellent partners to promote brand and build awareness when entering the market
- There are retailers who dominate the market or have presence in multiple markets which can help brands achieve scale and access
- Retailers are open to work with brand owners directly and some retailers make this a deliberate strategy to increase competitiveness on the market

- E-commerce is growing rapidly in Southeast Asia with Singapore in the lead given its high digital maturity, as well as burgeoning expansion in surrounding markets
- Online retail will be a powerful route-to-market when its potential is fulfilled therefore building e-commerce experience in Southeast Asia as well as being a first mover is beneficial to build brand awareness towards consumers and to form partnership with e-commerce platforms
- The online channel also represents a lower cost to access the market however marketing efforts remain important

CONTENT

- Background on Southeast Asia
- Food programme
- Route-to-market
- Next steps

JOIN US FOR A SEMINAR ON RETAILING ONLINE WITH REDMART ON 18 DECEMBER 2018

BREAKFAST SEMINAR IN STOCKHOLM, 18 DECEMBER 2018

redmart™ x TRY SWEDISH!

Don’t miss this opportunity to participate in a seminar jointly presented by Business Sweden and Redmart to get a detailed insight into the online grocery retail landscape in Singapore and how your products can succeed on the online marketplace

What are the trends within online grocery retail in Singapore?

What types of promotional activities would work to promote products?

What are the key success factors for companies on this platform?

How can my products be part of the first TrySwedish e-shop in Southeast Asia?

Learn all these and more from Business Sweden’s food team and guest speaker from Redmart!

WILL SOUTHEAST ASIA BE YOUR NEXT KEY MARKET?

CONTACT US FOR MORE INFORMATION AND FURTHER DISCUSSION



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THE SWEDISH TRADE & INVEST COUNCIL

BUSINESS SWEDEN

FOOD & BEVERAGE (F&B) OPPORTUNITIES IN KOREA

FOOD EXPORT PORTAL – OVERVIEW OF THE KOREAN F&B MARKET

SOUTH KOREA 2018 – SOOKYOUNG LIM



Image credits: Magnus Skoglöf/imagebank.sweden.se

THE KOREAN FOOD MARKET IS CHARACTERIZED BY A GROWING INTEREST IN SAFE AND HEALTHY FOOD…



Being a home to 51 million people on a small area, South Korea offers a **dynamic consumer market as well as advanced domestic industries** with a global reach

Korean consumers have **high purchasing power** with 22,000 USD of average household net adjusted disposable income per capita

EU-Korea FTA entered into force in 2011 providing the biggest market liberalization in years by eliminating duties for nearly all EU's agricultural exports

Korean consumers buy the most **groceries online** accounting for 19.7% of global e-commerce grocery market share

Korea is **12th largest F&B market** in the world and relies quite heavily on food imports

Well-being trend boosts sales of **premium, safe, healthy and organic products**

...AS WELL AS CONVENIENT ONLINE GROCERY SHOPPING



- Several retail companies use Korea as a test market for success in Asia.
- Sales of imported food has increased in the Korean food in recent years.
- Swedish F&B products have a favorable image as premium, safe and high-quality.
- A variety of channels to market.
- Implementation of EU-Korea FTA resulting in the removal of 97% of all tariffs will influence the food and drink sector as well.

- Targeting less price sensitive sectors.
- Organic and natural food, premium and unique products with story telling, functional ingredients and innovative food technology.
- Fast moving business culture – quick response, market commitment and the timing of shipping are crucial factors.

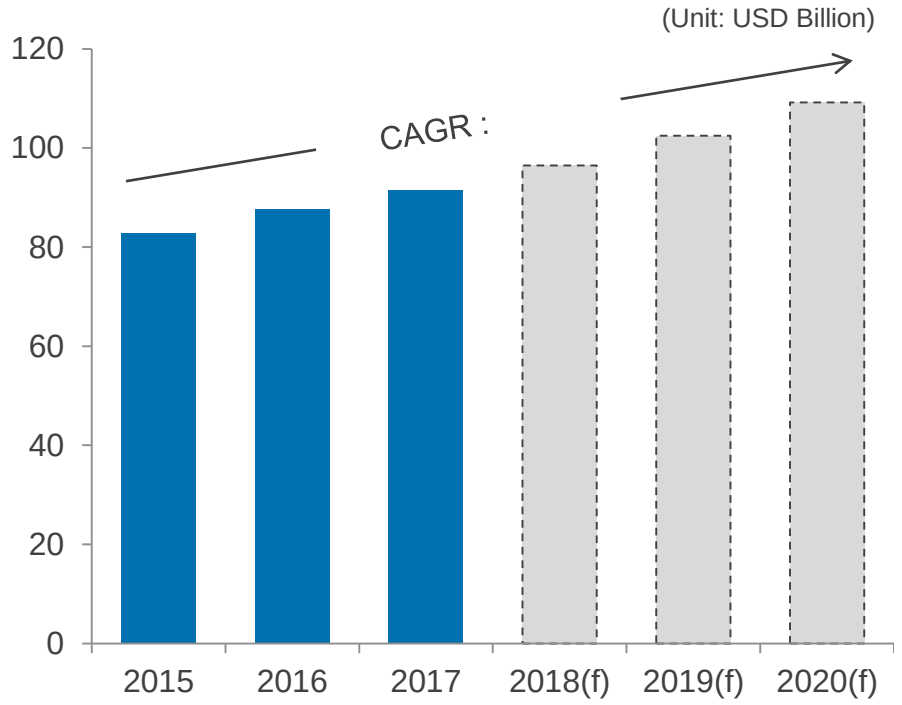
SEGMENT ANALYSIS ASSESSMENT SCOREBOARD

	Market size and growth	Market demand	Ease of procedure	Competitive intensity	Specific area of opportunity	Overall attractiveness
Vegetables and fruits	M	M	M	M	• Berries • Seasonal fruits and vegetables	3
Meat and meat products	H	M	L	M	• By-products • Wet and dry cured bacon as semi-finished products	3
Dairy	H	H	L	M	• Cheese and premium baby formula	2
HMR and Confectionery	H	H	H	M	• HMR • Super grains (e.g. oats, cereal) • Organic and baby food	1
Beverages	M	M	H	M	• Mineral and sparkling waters from clean nature	2
Alcoholic beverage	H	H	M	M	• Craft beer • Low alcohol content drinks • Premium wine	1

SOURCE: BUSINESS SWEDEN ANALYSIS

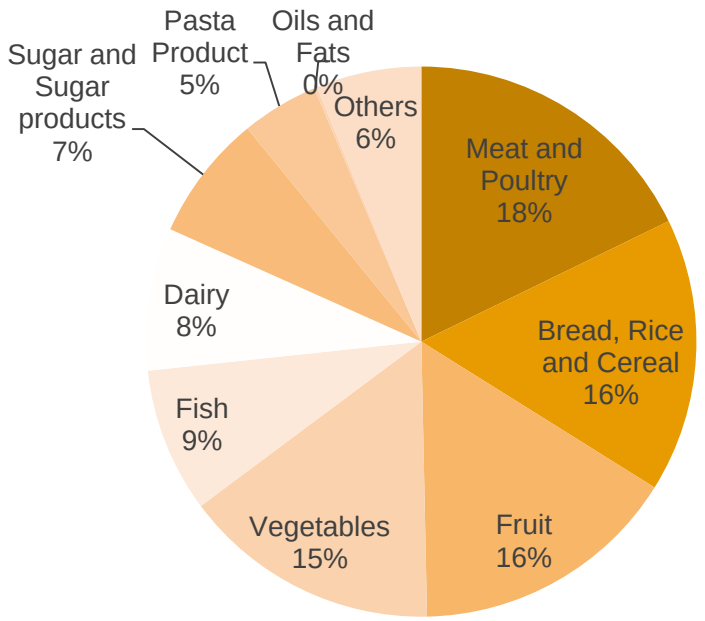
FOOD AND BEVERAGE MARKET IN KOREA IS EXPECTED TO INCREASE STEADILY IN THE COMING YEARS

FOOD & BEVERAGE MARKET BY SALES, 2015-2020



* Average exchange rate (2017): 1 USD = 1100 KRW

FOOD & BEVERAGE MARKET BY SEGMENT, 2017

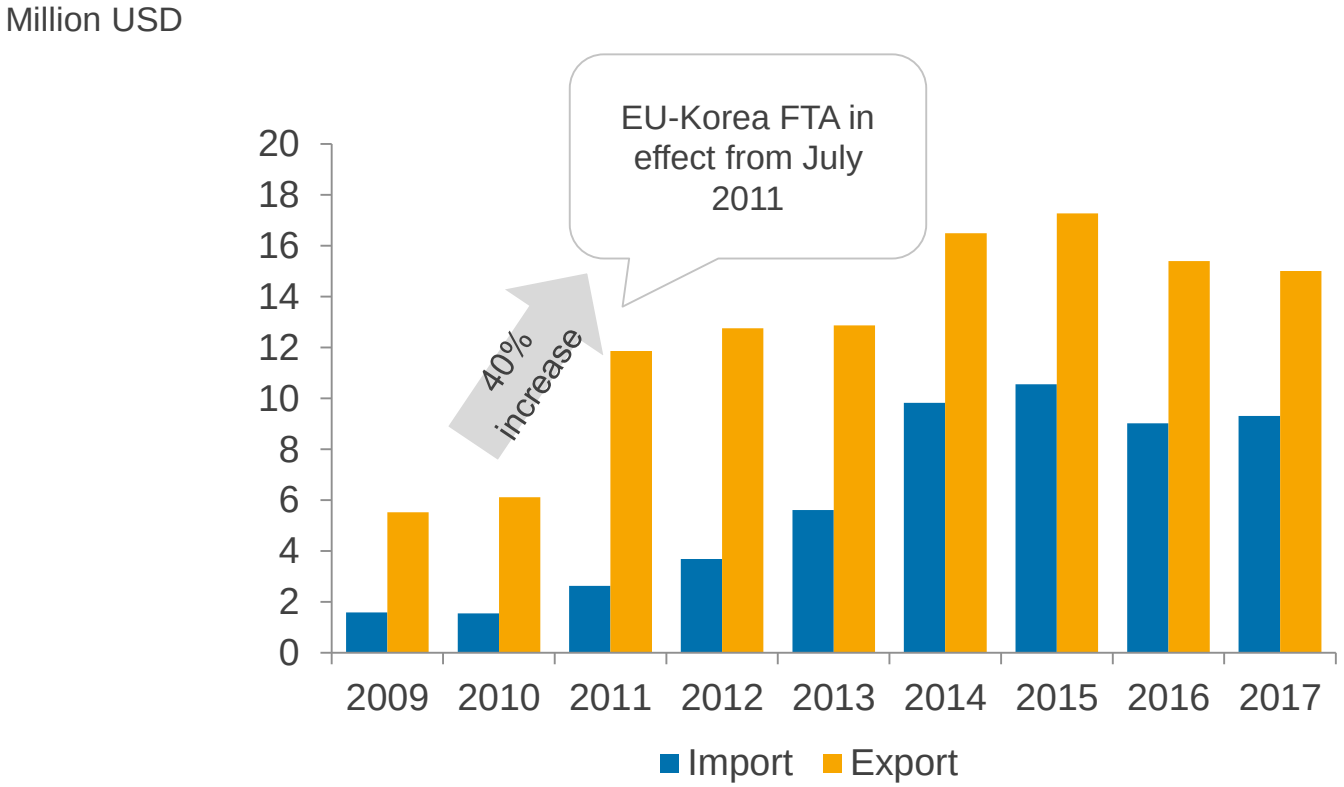


MEAT AND POULTRY; BREAD, RICE AND CEREAL ACCOUNT FOR ONE-THIRD OF SOUTH KOREAN FOOD & BEVERAGE MARKET

SOURCE: BMI RESEARCH

SWEDEN'S TRADE IN FOOD WITH SOUTH KOREA HAS INCREASED AFTER EU-KOREA FTA

SWEDISH FOOD & BEVERAGE TRADE WITH KOREA 2009-2017



SWEDISH FOOD & DRINKS IN KOREA



Orkla



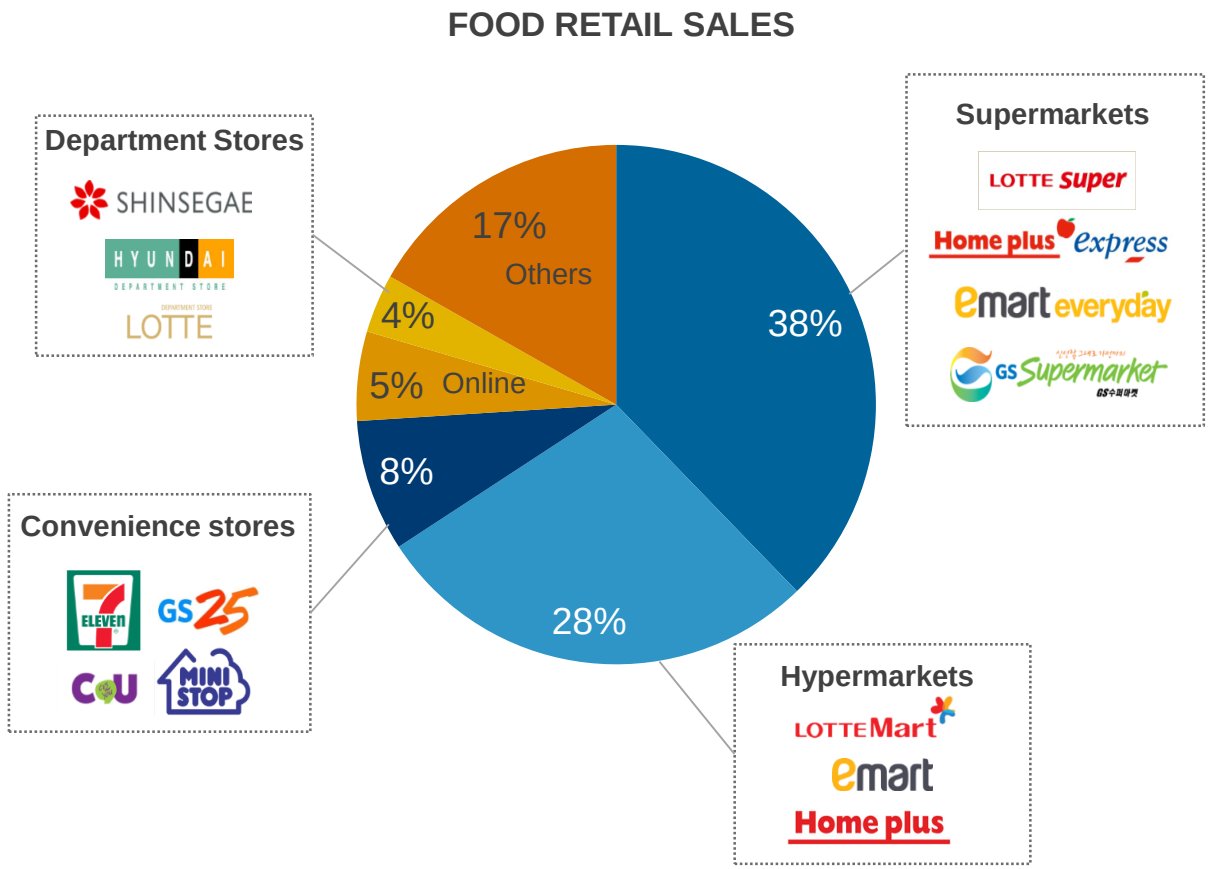








SUPER AND HYPER-MARKETS ACCOUNT FOR 65% OF THE FOOD RETAIL SALES

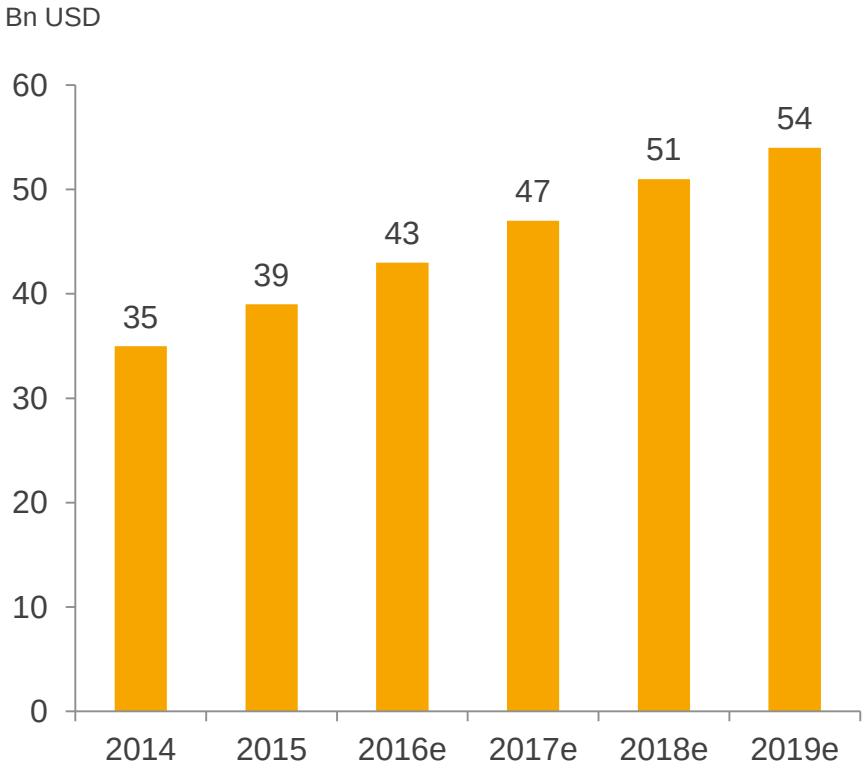


- Supermarkets and hypermarkets are dominating the market taking over a 65 % share.
- The leading hypermarkets are E-mart, Homeplus and Lotte-mart.
- Hypermarkets and supermarkets have been major retail channels for imported food and beverage products in Korea.
- Department stores the main channel for high-end imported food and beverage products.

SOURCE: KOREA STATISTICS, UNITED STATES DEPARTMENT OF AGRICULTURE FOOD COMPOSITION DATABASES FOREIIGN AGRICULTURAL SERVICE ESTIMATED FOOD SALES

THE KOREAN RETAIL E-COMMERCE MARKET IS EXPECTED TO GROW WITH 54% BETWEEN 2014-19

SIZE OF SOUTH KOREA'S ECOMMERCE MARKET



KEY FIGURES

Ecommerce market growth

+54%

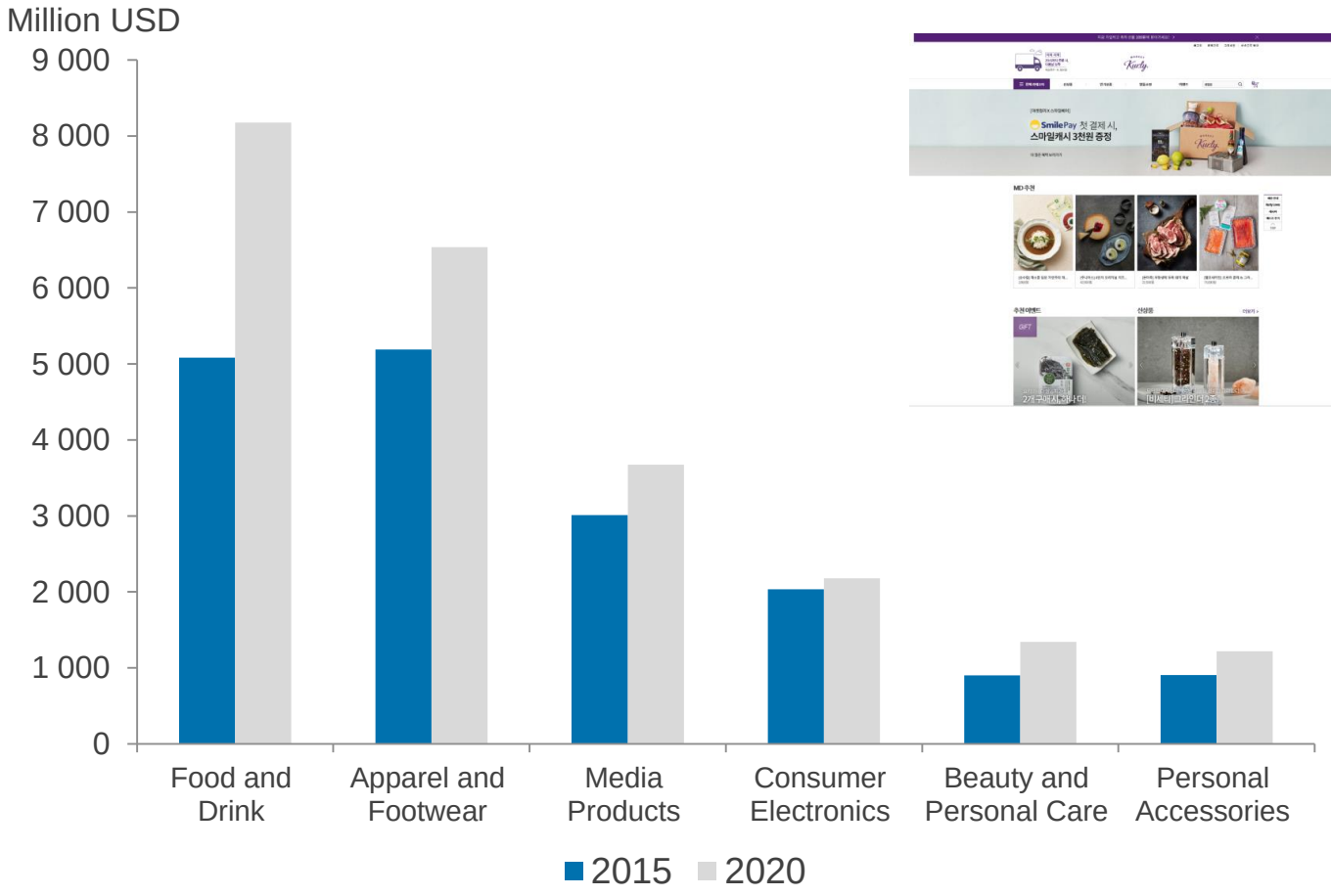
2014 - 2019

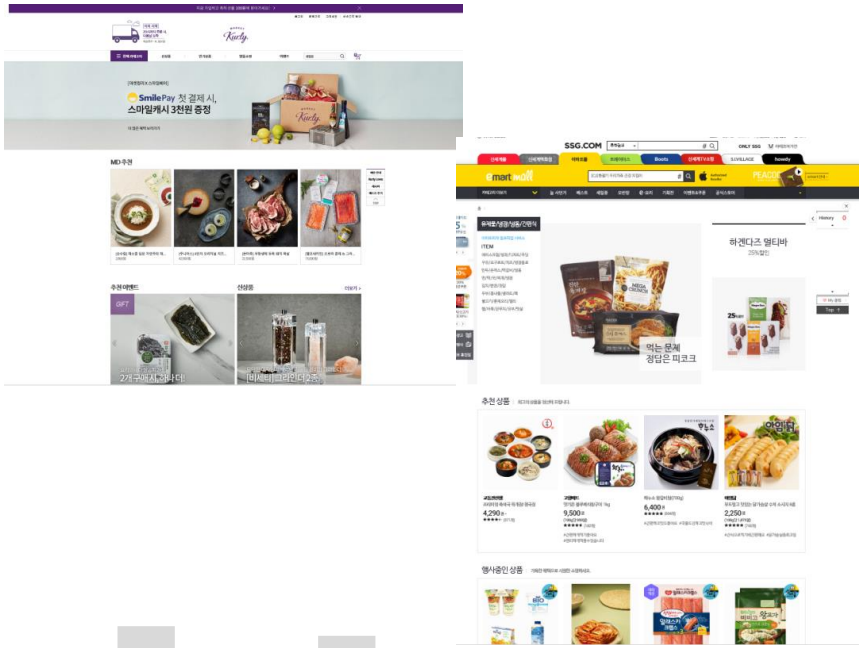
Mobile shopping

+45%

2013 - 2016

FOOD AND APPAREL ARE THE MOST PURCHASED PRODUCTS IN THE KOREAN E-COMMERCE MARKET





Others represent 17BN (2015) and 27,6Bn (2020)

EUROMONITOR

PRICING, SHELF LIFE & LABELING REQUIREMENTS

PRICING GUIDE

Invoice amount (CIF)	4.5 USD
Customs duty (average 0 - 8%)	4.8 USD
Logistic cost (20%)	6 USD
Importer margin (average 30%)	8.5 USD
Wholesaler margin (average 15%)	10.1 USD
Retail margin (average 25%)	13.5 USD
VAT (10%)	15 USD

- The average mark-up for import goods in the Korean retail market is around 3 – 3.5.
- Korean importers require 6-12 months shelf-life.
- MFDS also reviews the product to see if it has enough shelf-life to be sold in the country.

GENERAL LABELING REQUIREMENTS

- All imported food products are required to carry legible Korean language labels. Stickers or tags may be used, but should not be easily removable nor should they cover the original label. Labels must contain the following information
  - Product name
  - Product type
  - Importer's name and address
  - Manufacture date
  - Shelf life or best before date
  - Contents (calories)
  - Additives
  - Allergens
  - Nutrients



SEVERAL ACTIVITIES ARE DESIGNED TO INCREASE SWEDISH FOOD EXPORTS TO SOUTH KOREA





Bättre möjligheter för export genom frihandelsavtal och minskade handelshinder

Kristina Olofsson & Lina Kamara

KOMMERSKOLLEGIUM
NATIONAL BOARD OF TRADE SWEDEN



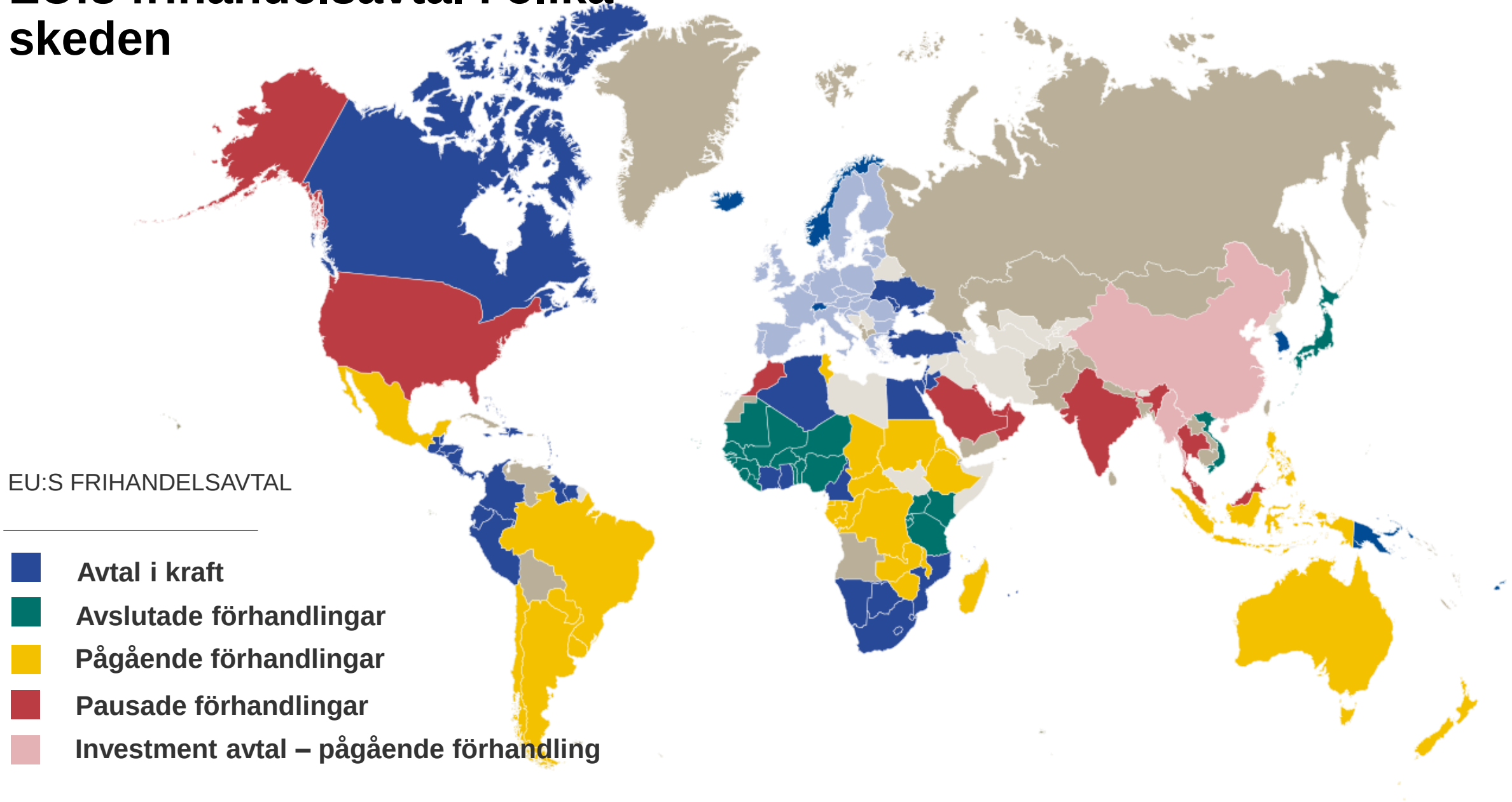
Sveriges myndighet för utrikeshandel, EU:s inre marknad och handelspolitik

Vad är frihandelsavtal?

- Handelsförenklingar
- Minskade/borttagna tullar
- Icke-tariffära handelshinder
- Transparenta regler för handel
- Plattform för
  - Samarbeten/dialoger
  - Lösa konkreta handelshinder



EU:s frihandelsavtal i olika skeden



Tullar som tas bort
- exempel

TULL

↓

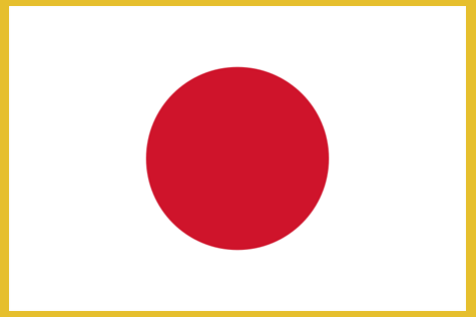
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Godis: 9,5 %
Såser: 11 %
Chips: 6 %



Frysta kycklingdelar: 20 %*
Fryst griskött: 25 %
Kakor: 8 %



Choklad: 10 - 29,8 %
Hårdost: 29,8 %
Godis: 25 %



Sylt: 40 %
Cider: 55 %
Vodka: 48 %

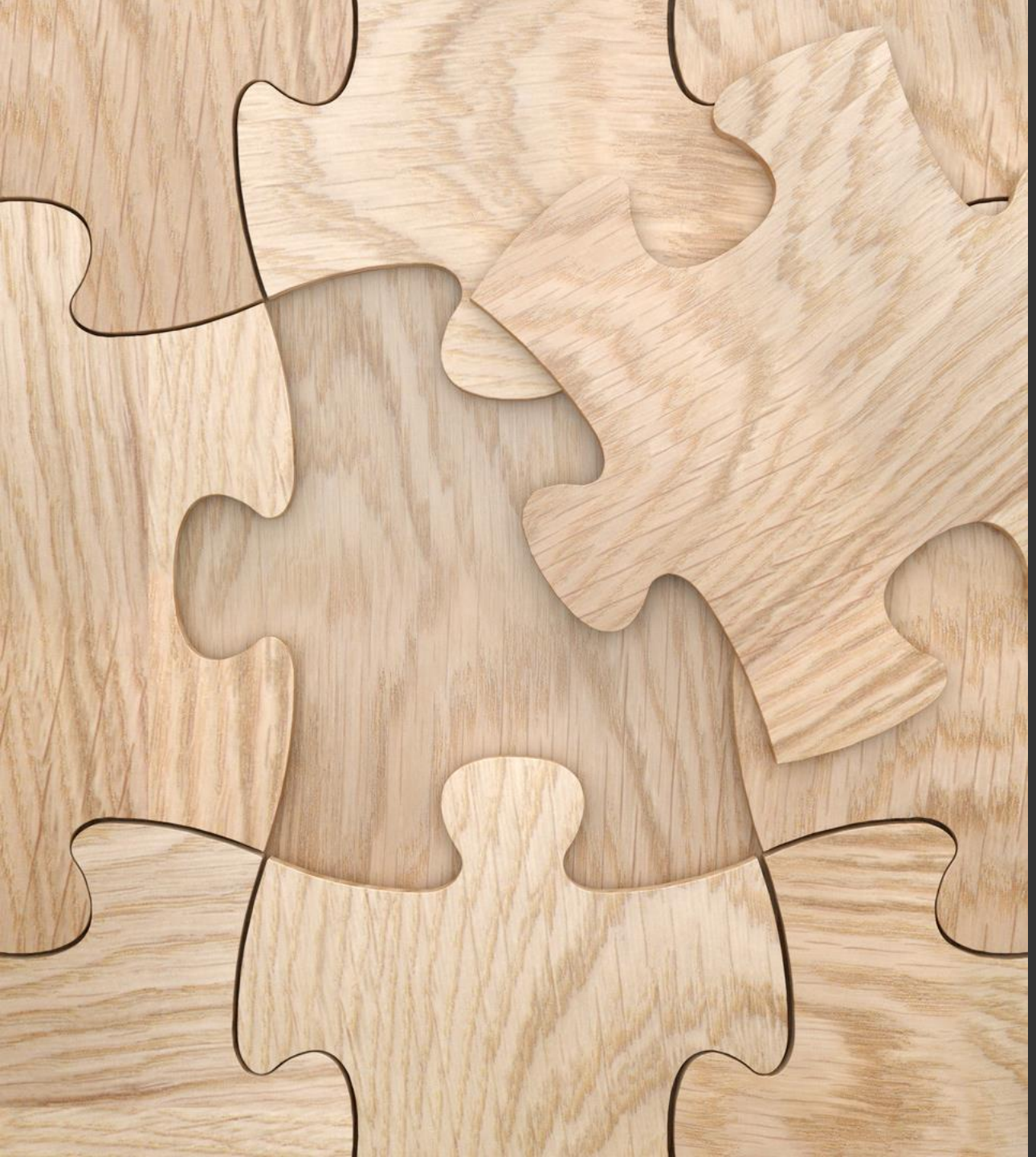
* Nedtrappning av tullen pågår.

Hur hanteras handelshinder i frihandelsavtal?

- Snabbare behandling av exportansökningar
  - Ex. Mexiko: snabbspår för exportansökningar

- Fortsatt samarbete om livsmedelstillsatser (JP)
- Transparens – importlandet ska publicera importvillkor
- Plattform för att diskutera konkreta handelshinder





Hur vi jobbar med handelshinder

- EU-samarbete: marknadstillträdeskommittén
  - Partnerskap: företag, medlemsstater & EU-kommissionen
  - Prioriterade marknader & nyckelhinder
  - Kraftsamla för gemensamt agerande
- Samarbete mellan svenska myndigheter och EU-kommissionen
- Rapportera hinder till Kommerskollegium!

Exempel på problem EU/SE försöker lösa



- Diskriminering vid försäljning av sprit



- Importförbud för nötkött från EU



- Vissa tillsatser (godkända i EU) inte tillåtna



- Hälsointyg för lågriskprodukter
- Marknadstillträdet för griskött



Exempel på hinder som har lösts

- Kinesiskt intygskrav för lågriskprodukter uppskjutet i 2 år.
- Strikta kinesiska ftalat-krav (sprit) togs bort efter påtryckningar.
- Sverige godkänt för export
  - Fågel & färskt nötkött (Japan)
  - Värmebehandlat nötkött (Australien)
  - Nötkött (Taiwan)
  - Griskött (Sydkorea)

Kontakta oss gärna!



Framför företagsintressen i olika förhandlingar

freetradeagreements @kommers.se



Ställ frågor om färdiga avtal Freetradeagreements @kommers.se

Hitta info om avtal på webben, t.ex. Japanportal , CETA-portal (Kanada), Sydkoreaportal



Rapportera:
….krångel och hinder
….svårigheter att utnyttja tullförmåner

Webbformulär om exportproblem


NATIONAL BOARD OF TRADE SWEDEN
KOMMERSKOLLEGIUM



Exportera mera med EKN

2018-11-06
Hilda Hellgren
Michael Regmert








Försäkringsverksamhet
ekn
Underlättar finansiering
Svenska staten

Den statliga ”familjen”

EKN garanterar

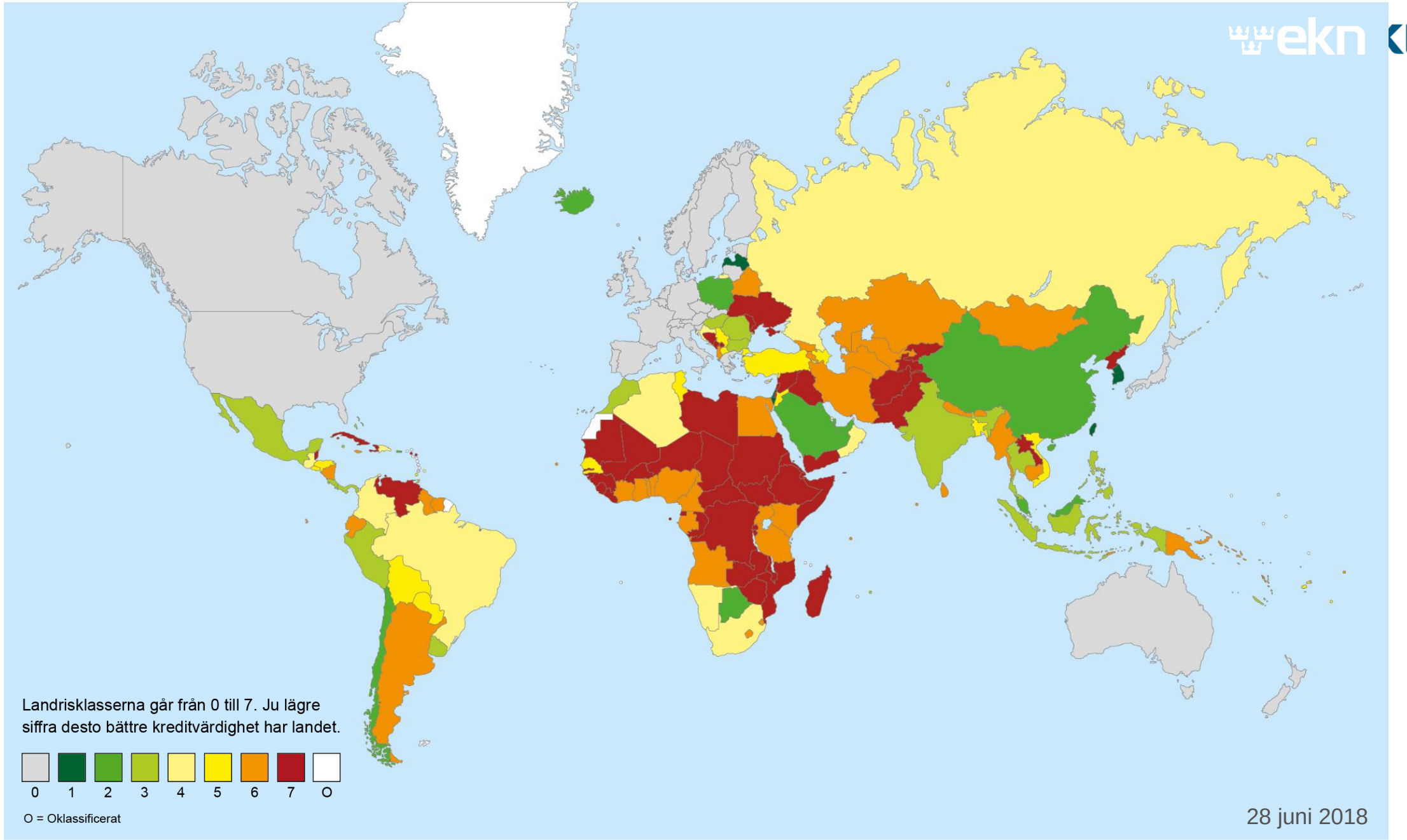
SEK finansiär

UD

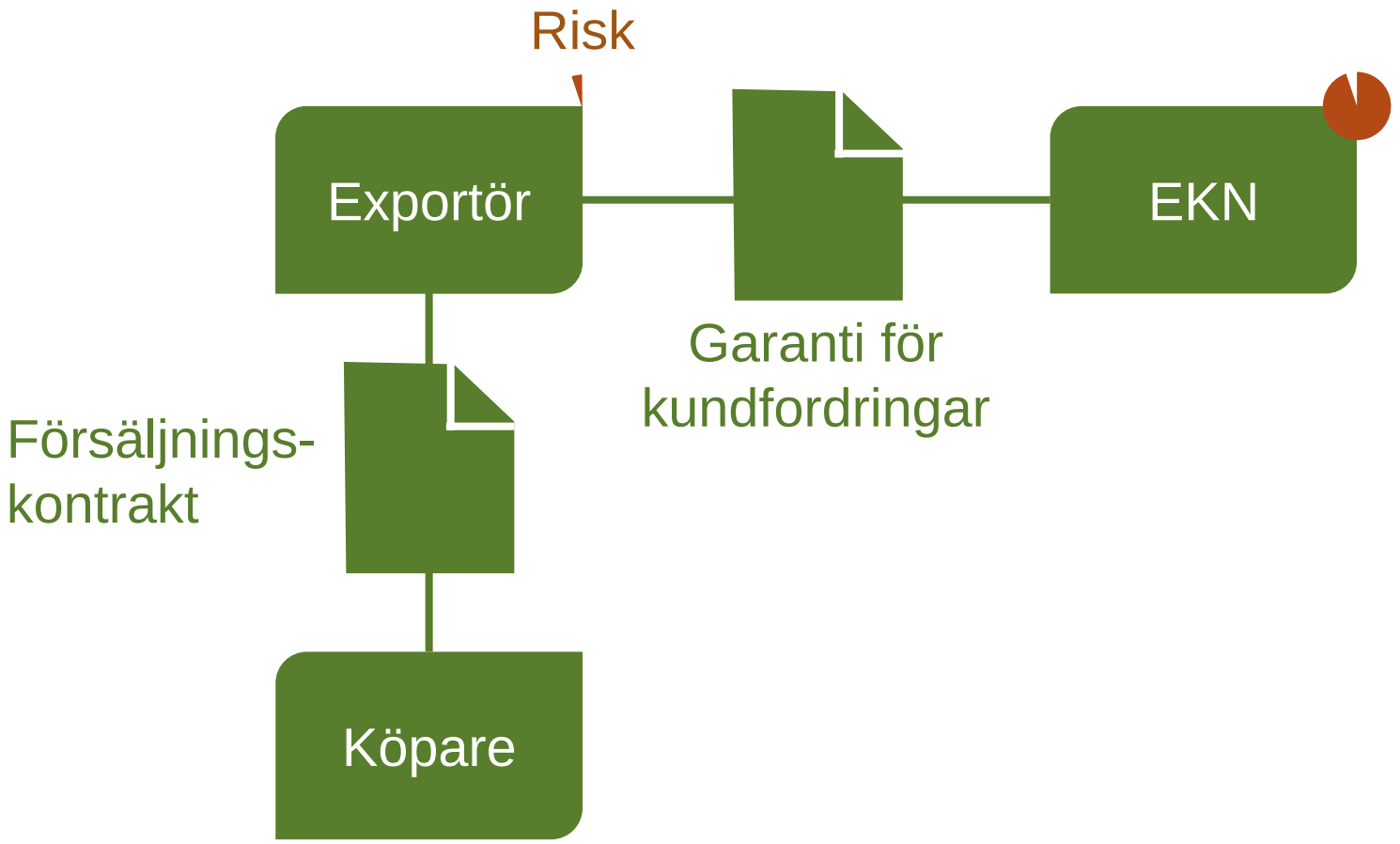
SIDA

Swedfund risk-kapitalist

Business Sweden


Landrisklasserna går från 0 till 7. Ju lägre siffra desto bättre kreditvärdighet har landet.
0 1 2 3 4 5 6 7 O
O = Oklassificerat
28 juni 2018

Garanti för kundfordringar/leverantörskredit



Fördelar med EKN

- Riskavtäckning – ni kan sälja till köpare som är osäkra och/eller i osäkra länder
- Kan erbjuda era kunder kredit – vilket är en konkurrensfördel
- Ni kan diskontera EKN-garantin i bank vilket förbättrar ert kassaflöde

Pris: 2 månaders kredittid till Kina: 0,41% av levererat belopp

Prisindikationer www.ekn.se

Förutsättningar

- Max. 180 dagars kredittid vid livsmedelsexport
- EKN kan ej garantera risker till EU och OECD-länder som är kortare än två år
- EKN kan garantera även försäljning av utrustning för livsmedelsproduktion – längre kredittider är då möjligt

Kontakta oss

För exportörer som omsätter upp till 5 mdr SEK, se region:
https://www.ekn.se/vad-vi-gor/sme-midcorp/

För exportörer som omsätter över 5 mdr SEK:
Hilda Hellgren: hilda.hellgren@ekn.se 08-788 00 41
Michael Regmert: michael.regmert@ekn.se 08-788 01 19

TRY SWEDISH!

THE SWEDISH TRADE & INVEST COUNCIL

BUSINESS SWEDEN



NÄSTA STEG I INTERNATIONELL MARKNADSFÖRING AV SVENSKA LIVSMEDEL

TRY SWEDISH – EXPORTPROGRAM

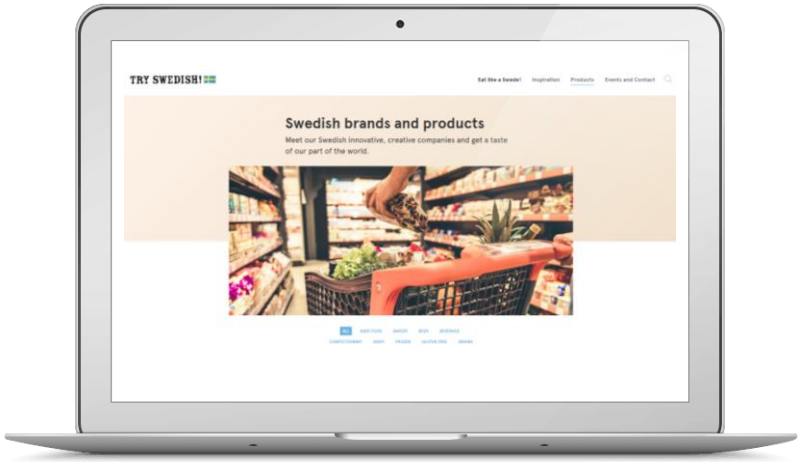
6 NOVEMBER 2018

TRY SWEDISH!

SVENSKA LIVSMEDELSVARUMÄRKEN OCH PRODUKTER
ERBJUDS UNDER LEDFLAGGAN TRY SWEDISH
MED BUDSKAP OM SVENSK MATKULTUR



MÄSSOR



WEBB

TRY SWEDISH!

EN INBJUDAN ATT PROVA UNIKA SVENSKA MÅLTIDSBETEENDEN
OCH UPPTÄCKA SVENSKA LIVSMEDELSVARUMÄRKEN OCH PRODUKTER



FIKA



MELLANMÅL



FREDAGSMYS



SHAPED BY SWEDEN

TRY SWEDISH!

AKTIVERING AV KONCEPTEN I FLERA KANALER



SOCIALA MEDIA

PRESS/ MAGASIN

MÄSSOR

WEBB

NÄSTA STEG

ARBETE I TRY SWEDISH EXPORTPROGRAM

- Öka antalet insikter och historier om ”FIKA” och ”Fredagsmys” på Try Swedish.se, Try Swedish LinkedIn, Instagram och Facebook (riktad till globala inköpare)
- Provtrycka alternativa koncept Organic på NOFF 14-15 november
- Fördjupa och utveckla koncepten ”FIKA” och ”Fredagsmys” och aktivera på mässor under våren 2019
- Initiera utveckling av koncept ”Mellanmål”

LIVSMEDELSFÖRETAGEN

- Var med och utveckla koncepten – placera ert varumärke och era produkter i rätt koncept
- Använd koncepten i er marknadsföring
- Dela inlägg på Try Swedish sociala media med era nätverk i sociala media

TRY SWEDISH!

Hur kan man använda det svenska kockundret för att stärka den svenska livsmedelsexporten?

- Exportprogram för Sveriges måltidsturism



Foto: Jens Heed

Jens Heed/181106

Europeiska jordbruksfonden för landsbygdsutveckling: Europa investerar i landsbygdsområden

Visit Sweden

Svenska kockundret

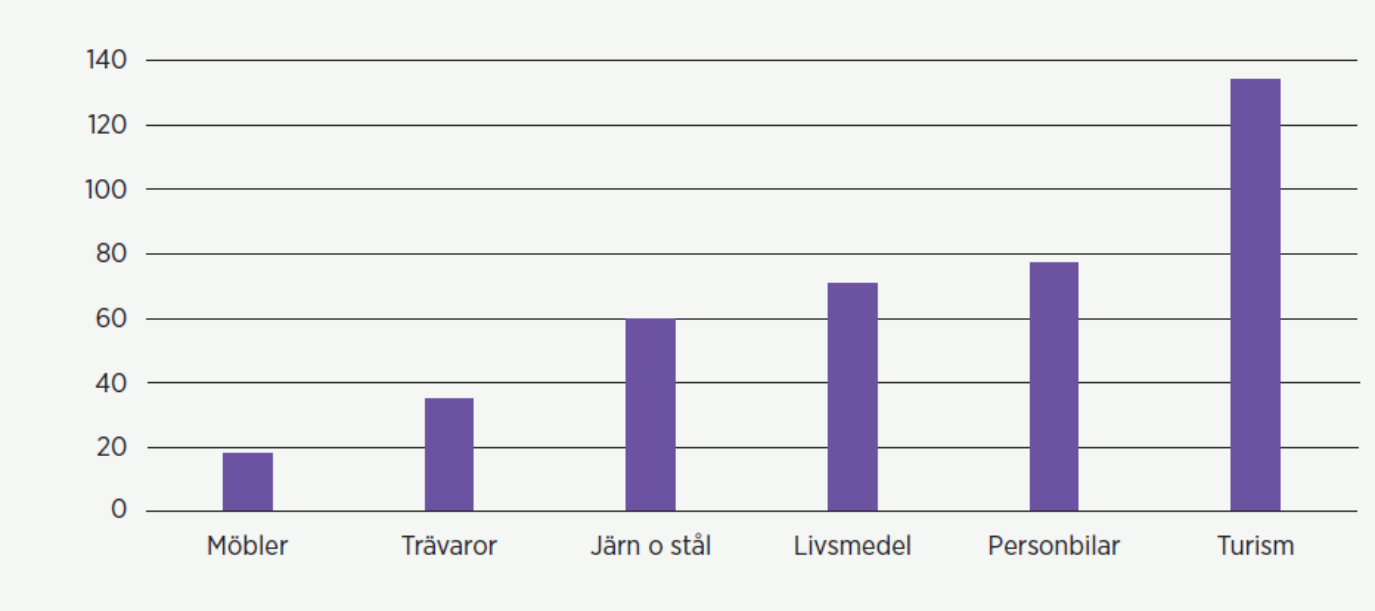
- Culinary Olympics 2012
  - Guld National team
  - Guld National junior team
  - Guld Community Catering
  - Guld Regional team Stockholm
- Culinary Olympics 2016
  - Guld National junior team
  - Guld Regional team Stockholm
  - Silver Community Catering
- Bocuse d'Or
  - Brons 2015, Tommy Myllymäki
  - Sexa 2013, Adam Dahlberg
  - Silver 2011, Tommy Myllymäki
  - Silver 2009, Jonas Lundgren



Visit Sweden

Utländsk turism i Sverige är export

- Exportvärde 134 miljarder kronor (+11%)
- Totalt 175 800 sysselsatta inom turism (+6,4%)
- Turismens exportandel 6,4%



Olika branschers exportvärde 2017 (miljarder kronor)

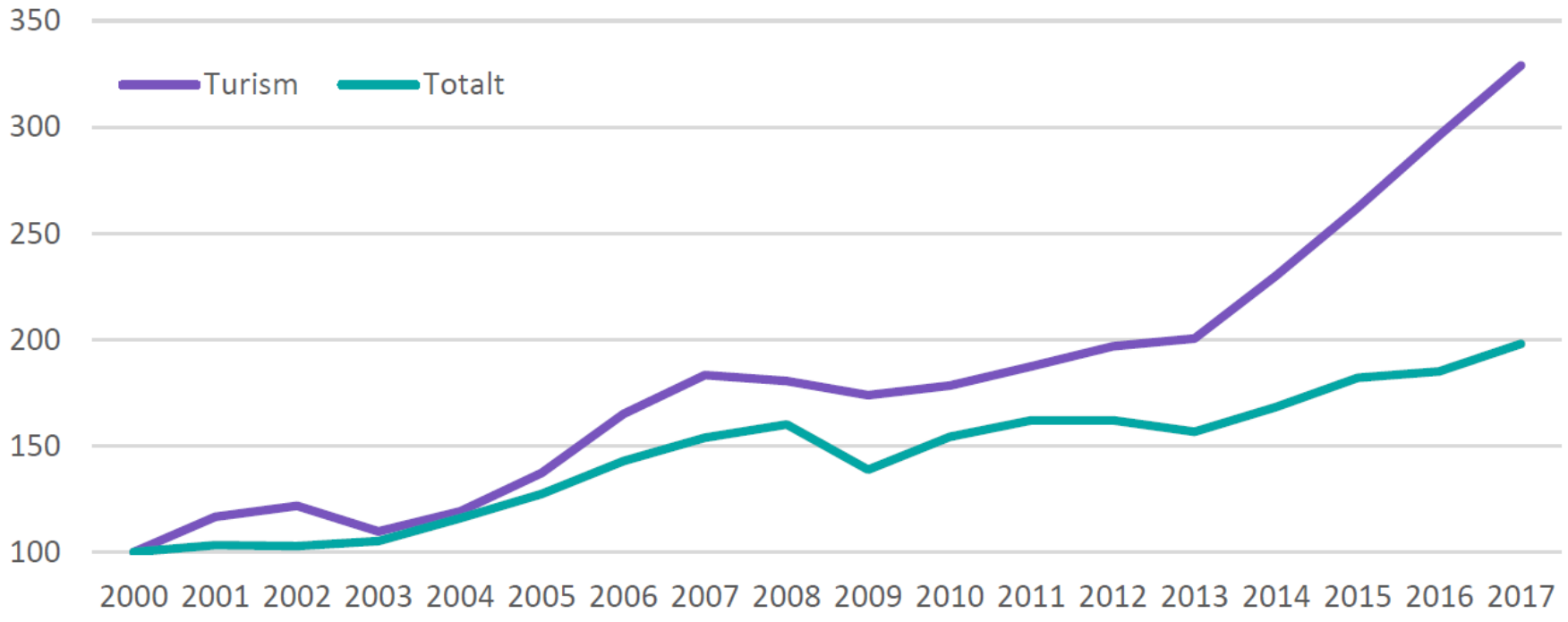
Källa: Tillväxtverket/SCB

Europeiska jordbruksfonden för landsbygdsutveckling: Europa investerar i landsbygdsområden

Visit Sweden

Svensk turism är en exportsuccé -

Figur 3.1 Index för turismens exportvärde i jämförelse med Sveriges totala export av varor och tjänster, löpande priser, Index 2000 = 100



Källa: Tillväxtverket/SCB

Visit Sweden

47 miljarder kronor

2017

-> En ökning om 49% sedan 2014

Visit Sweden

Exportprogram för Sveriges måltidsturism 2020

- Livsmedelsstrategin/Exportstrategin
- Från okänt till intressant och spännande matdestination
- Nytt exportprogram 2017-2021
  - stärka Sveriges konkurrenskraft som måltidsdestination
  - öka utländska besökares konsumtion av restaurangtjänster och livsmedel
  - skapa ny marknad med de matintresserade resenärerna.



Foto: Jens Heed

Smaken av en plats

- Mat är en reseanledning
- Mat är kultur
- Mat är en plats
- Mat är en relation



Foto: Tina Stafrén/imagebank.sweden.se



Foto: Apelöga/imagebank.sweden.se

Bilden av svensk mat idag



Intressant matarena

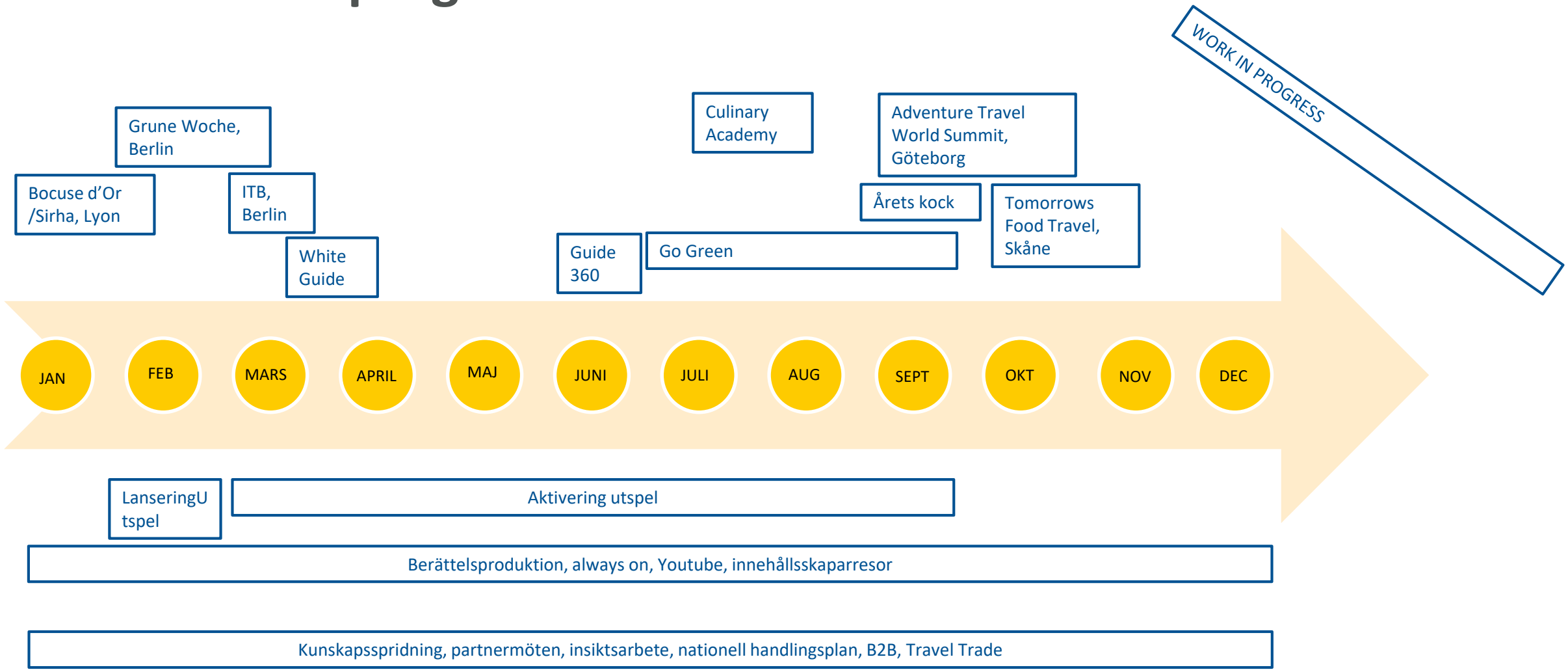
Kreativ & innovativ mat

Progressiv matkultur

Unika & lokala produkter och råvaror

Hälsosam mat och dryck

Måltidsturismprogrammet - 2019



Visit Sweden

Tack!

jens.heed@visitsweden.com
0708-26 84 99



The European Agricultural Fund for Rural Development: Europe investing in rural areas

Visit Sweden

Foto: Tina Stafrén/imagebank.sweden.se

Avslutning

