Seafood IN SWEDEN at a glance

Conceptual presentation

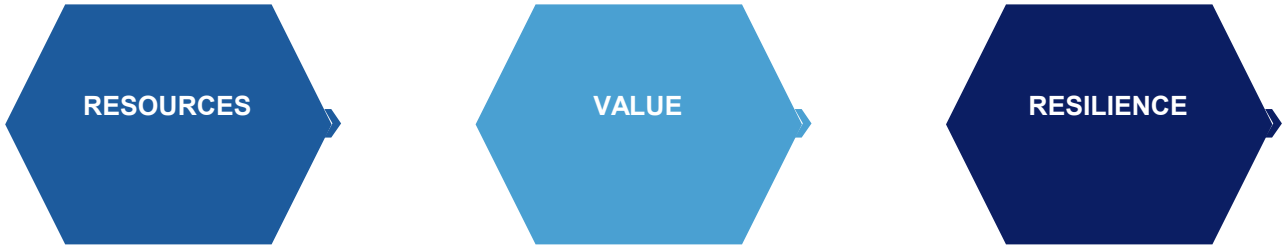
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FISKBRANSCHENS RIKSFÖRBUND

hållbar blå livsmedelskedja

Fisheries Innovation Days

Turku, Finland | 11 November 2026



How can Sweden create more food, jobs and export value from the aquatic resources already available?

FISKBRANSCHENS RIKSFÖRBUND

hållbar blå livsmedelskedja

The only from Aquatic to Fork organisation in EU

(some of our members)

Sveriges Fiskgrossister

FISKBRANSCHENS RIKSFÖRBUND

hållbar blå livsmedelskedja

Seafood is a global protein market

7,5 Mt

Import (i ton)	Export (i ton)
6,0 M	1,5 M

Topp 3 Exporterade arter

Vildlax, Hummer, Alaska Pollock

14,5 Mt

Import (i ton)	Export (i ton)
9,5 M	5,0 M

Topp 3 Importerade arter

Lax, Torsk/Vitfisk, Räkor

117,5 Mt

Import (i ton)	Export (i ton)
23,0 M	24,5 M

Topp 3 Importerade arter	Topp 3 Exporterade arter
Lax/Öring, Räkor, Tonfisk	Räkor, Tilapia, Alaska Pollock (filéer)

11,5 Mt

Import (i ton)	Export (i ton)
4,3 M	1,5 M

Topp 3 Importerade arter

Makrill, Sardiner, Tilapia

6,0 M

Import (i ton)	Export (i ton)
0,8 M	4,2 M

Topp 3 Importerade arter

Merluza (kummel), Tonfisk

Topp 3 Exporterade arter

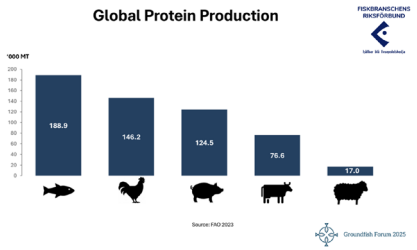
Lax (Chile), Ansjovis (fiskmjöl), Räkor

1,5 M

Import (i ton)	Export (i ton)
0,4 M	0,5 M

Topp 3 Exporterade arter

Hummer, Hoki, Lax



The EU market is large, import-dependent and increasingly price-sensitive

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EU SELF-SUFFICIENCY

32%

2025 estimate. Third-country imports provide 73% of total supply.

APPARENT CONSUMPTION

23.8 kg

Consumption per capita, 2025 estimate.

FRESH FISH AT HOME

−5%

Volume change in 2024.

CONSUMER SPENDING

€62.8bn

Up 4% in 2024, mainly because of higher prices.

A market opportunity, but not an automatic growth market

- **Affordability**
- **Familiarity**
- **Stable supply**
- **Trust & origin**

Source: Seafood Europe, Food balance for fish and fishery products, EU-27, 2025 estimate; EUMOFA 2025 for spending and fresh-fish trends.

Food Strategy 2.0: Strengthening competitive Swedish food production through blue food

BLUE FOOD CONTRIBUTIONS TO FOOD STRATEGY 2.0

1

FOOD-CHAIN RESILIENCE

More domestic food, viable processing capacity and supply options during disruption.

2

EXPORT & MARKET ACCESS

Wider markets create repeat demand, improve utilisation and diversify commercial risk.

3

SWEDISH QUALITY & VALUE

Quality, origin, gastronomy and whole-resource use strengthen value creation.

WHAT MUST WORK: A BALANCED END-TO-END CHAIN

No weak or overloaded handover

RESOURCE	FOOD-GRADE RAW MATERIAL	SUPPLY	PROCESSING	MARKET
Stocks • quotas • permits	Harvest quality • handling	Volume • continuity	Yield • utilisation	Format • price • reorder

Blue food dependent when food-grade supply, processing capacity and repeat demand are balanced across the full chain.

PREDICTABLE FRAMEWORK

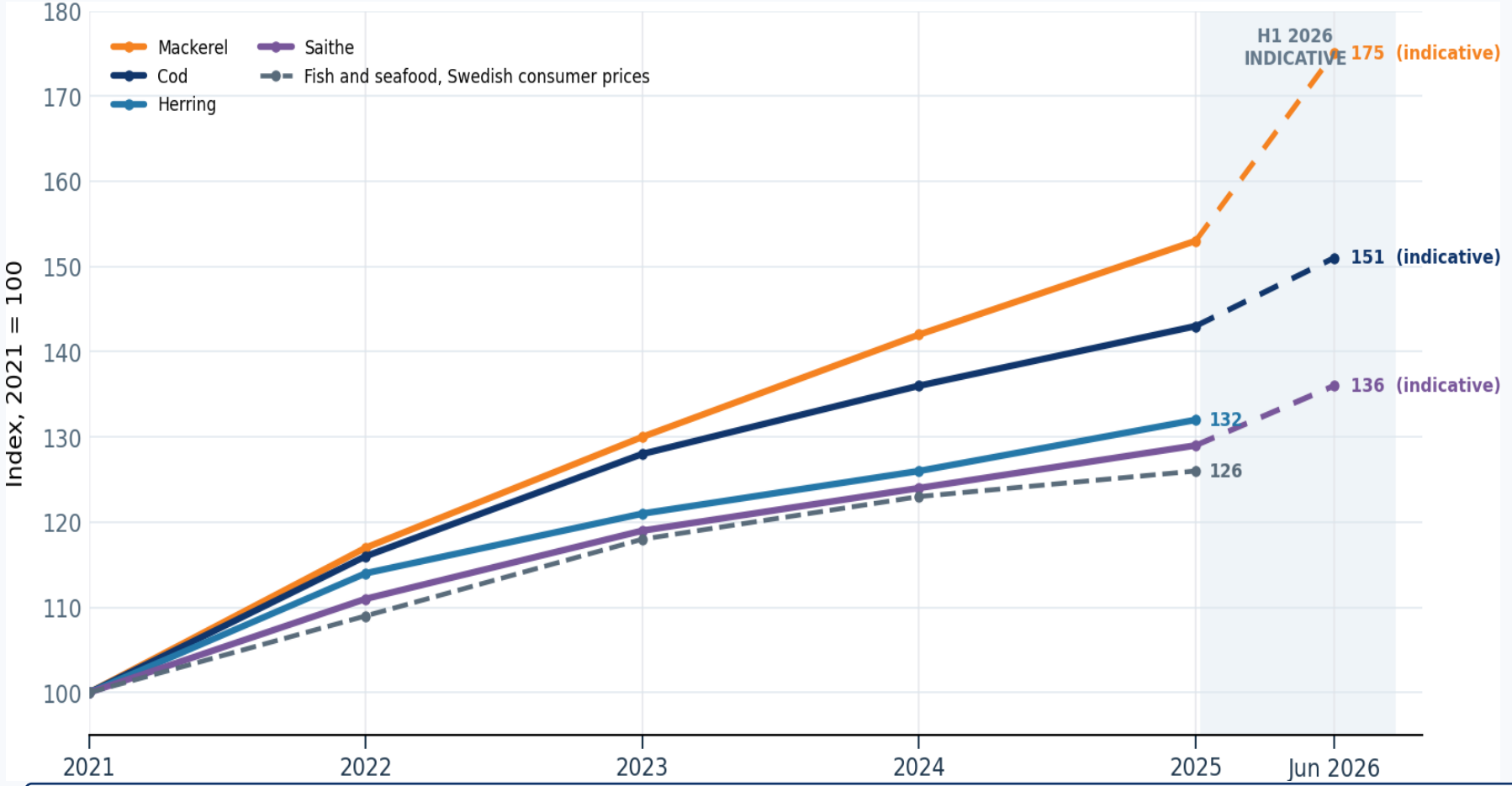
COMMERCIAL BALANCE

REPEAT DEMAND

Source: Swedish Food Strategy 2.0; FR analysis of the blue-food value chain.

Fish raw material has become significantly more expensive

Indicative price development 2021–2025 with H1 2026 trend, index 2021 = 100



KEY MESSAGE

Fish inflation is not a single curve.

- **Pelagic species:** mackerel and herring are strongly affected by quotas, stock development and export demand.
- **Whitefish:** cod and saithe are affected by supply, catch restrictions and exchange rates.
- **Consumer prices:** Swedish fish and seafood prices were approximately 25% above the 2021 level in 2025.

Early 2026 signals point to continued pressure, especially for mackerel, cod and saithe; dashed lines show an indicative H1 trend.

Indicative synthesis, not official species indices. Solid lines show 2021–2025; dashed extensions show an indicative trend to June 2026 only where early-2026 market signals are available. Sources: Eurostat, EUMOFA, Norwegian Seafood Council and Statistics Norway.

Four dimensions shape what gets listed and bought



REGULATORY GATE

- Food safety
- Traceability
- Mandatory information

ASSURANCE

- MSC/ASC/KRAV
- GLOBALG.A.P.
- Supplier doc.

CUSTOMER STANDARDS

- Retail buying standards
- Seafood guides
- Public procurement

SHOPPER CONVERSION

- Price
- Taste
- Convenience
- Familiarity and origin

Sweden has the resources, but not yet the market

The opportunity is to turn available Swedish species into products consumers want to buy.

WHAT SWEDEN EATS

1 Salmon

2 Herring

3 Shrimp

4 Cod

73% imported volume

Current demand pattern

THE MISSING BRIDGE

01 PRODUCT DEVELOPMENT

↓

02 CONVENIENT FORMATS

↓

03 ROUTES TO MARKET

Create repeat demand

SWEDISH RESOURCES WITH GREATER MARKET POTENTIAL



HERRING

Wild capture



RAINBOW TROUT

Aquaculture



BLUE MUSSEL

Aquaculture

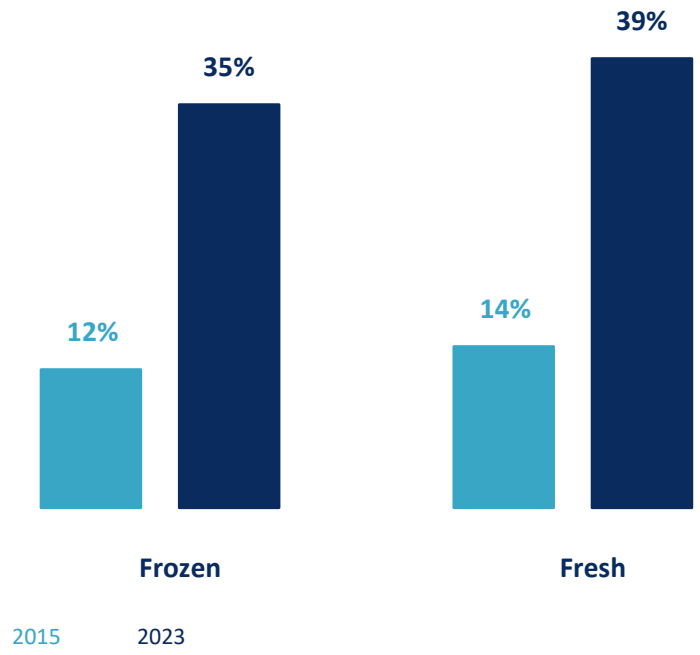
Available resources become growth opportunities when the offer fits the market.

Create demand for what Sweden can sustainably produce, not only substitutes for imported species.

Source: FR compilation of Swedish consumption, trade and resource data. Visuals generated with Microsoft Copilot.

Price is now a deal-breaker for one in three seafood shoppers

> price determines the purchase: 2015 versus 2023.



MAIN DRIVERS

Healthy • tasty • filling • freezer-friendly

MAIN BARRIERS

Price • access • inspiration • competing proteins

MARKET INSIGHT

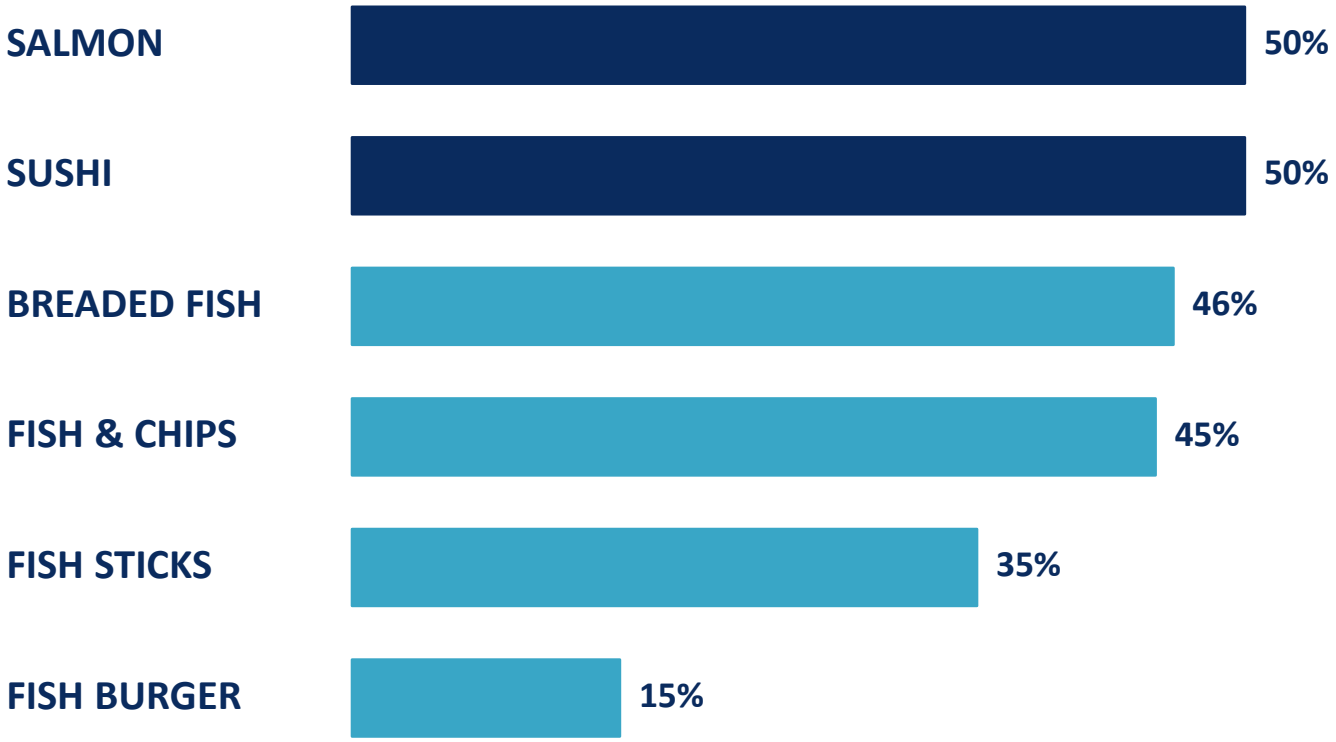
Seafood does not have a fundamental image problem. The category has an everyday relevance problem: affordability, availability, preparation confidence and formats that work for families.

Healthy and tasty is not enough: the offer must also clear the price and convenience threshold.

Source: FR compilation of Swedish consumer insights (2015 and 2023).

Children prefer seafood in familiar formats

The future opportunity is meals and occasions, not species communication alone.



1,397 RESPONDENTS

Swedish children and young people, ages 8–19.

CONSUMPTION GAP

62% of ages 8–11 eat fish 1–2 times/week;
45% of ages 16–19.

UNMET INTEREST

21% of ages 16–19 would like to eat fish more often.

Consumers often choose the meal before they choose the species.

Source: FR compilation of Swedish youth survey, ages 8-19 (n=1,397).

Use familiar consumption behaviours to unlock new resources

Formats already understood by consumers reduce adoption risk. Adjacent markets can provide the first scale.



SKILLINGE

Herring mince & crispy bites

Pelagic raw material → family convenience



GULDHAVEN

Vendace boquerones

Roe side-flow → exportable Mediterranean format



AXFOUNDATION

Bream mince & fish cakes

Underused freshwater fish → tested meal solution



GÅRDSFISK

Fish meatballs

New farmed species → familiar everyday meal

A different resource becomes attractive when the format and occasion are familiar. Export can industrialise the offer before domestic demand is fully developed.

Source: FR compilation; company cases are illustrative examples, not formal recommendations.

Export can accelerate capability building

Use existing demand in adjacent markets to build scale, processing capability and innovation at home.

01
EXISTING DEMAND
Nearby markets already consume relevant species, formats and applications.

02
EXPORT & REPEAT ORDERS
A wider market absorbs seasonal volume and diversifies commercial risk.

03
SCALE & INVESTMENT
Stable throughput supports automation, freezing, packaging and product development.

04
INDUSTRIAL CAPABILITY
Skills, quality systems, logistics and full-resource utilisation remain available at home.

05
RESILIENCE & HOME GROWTH
Capacity can be redirected in disruption while familiar formats grow domestic consumption.

NORDIC-BALTIC PROOF POINTS

NORWAY
Salmon export created scale for farming, feed, vaccines, equipment and aquaculture technology.

LATVIA
34,900 t Baltic fish processed into food; 21 processors, €172.8m turnover and 1,876 jobs.

SWEDISH AQUACULTURE
Export already supports utilisation: selected producers sell 50–70% outside Sweden or process via Åland/Finland.

EXPORT BUILDS SCALE • SCALE BUILDS CAPABILITY • CAPABILITY CREATES RESILIENCE

Source: FR synthesis; Nordic Seafood Summit 2026, Andris Bite / Karavela; Swedish aquaculture industry data.

Create value by combining product relevance with market scale

Move suitable raw material into food first, build repeat demand across markets, and optimise value from the whole fish.

Lowest food-market value capture

Food-grade conversion and yield

Higher margin through format and relevance

Scale, utilisation and risk diversification

INGREDIENT USE

Fishmeal / fish oil



PRIMARY FOOD

Fillets • mince • frozen blocks

CONSUMER-READY

Meals • snacks • convenience

MARKET PORTFOLIO

Domestic + export channels



Increased total value (main + sidestream)

Value per tonne and sufficient market scale are complementary: together they strengthen processing economics, capability and resilience.

Source: FK analysis.

Sweden + Finland: from strong relations to stronger delivery

Connect government, authorities and industry around shared implementation and growth.



ONE SEA • TWO MARKETS • SHARED RESPONSIBILITY

Move from dialogue to joint delivery

STRONG FOUNDATION
Government + networks

MISSING LINK
Authority-to-authority

BIGGEST OPPORTUNITY
Industry-to-industry

FIVE SHARED PRIORITIES

1 ALIGNED EU VOICE ON MOST LEVELS

VALUE BASED - PROPORTIONATE REGULATION

JOINT BLUE FOOD ACCELERATOR

5 INDUSTRIAL GROWTH

FOOD DRIVEN BALTIC MANAGEMENT

4 TRUST-BASED RULES

Public value • proportionate burden • industry involved from the start

CAN WE DO MORE BY DOING LESS NUMBER OF INITIATIVES, FOCUSING ON THE CORE OBJECTIVES WITH MORE INCLUSION OF THE BLUE FOOD CHAIN

Sources: Swedish–Finnish Cooperation Declaration; EUSBSR; HELCOM/BALTFISH; FR positions; Finnish Ministry; EU control rules; EFSA; Seafood Europe. Visual generated with Microsoft Copilot.