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# Sweden

# Livestock and Products

# Annual

# 2000

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**Report Highlights:**
**Sweden does not approve of the use of hormones in domestic beef production. In the present (WTO beef hormone) dispute, Sweden has pushed for generous compensation to the US, but it will probably side with other member states in denying access to US beef before internal EU risk studies are completed and until additional domestic consensus among several critical groups is achieved. While export opportunities for U.S. meat producers to Sweden are limited, the demand from mainly restaurants for a tastier and fatter meat is increasing and may be an area where hormone-free beef from the U.S. could win market entry.**

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Includes PSD changes: Yes
Includes Trade Matrix: Yes
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## Executive Summary


The meat market in Sweden during 1999 was characterized primarily by a gradual recovery from severe slump in pork production that bottomed out at year-end 1998. The situation for beef was relatively stable, although this category of meat has also been adversely affected by the production trend for pork in recent years.

The demand for meat continued to develop favorably in 1999. Consumption of pork, beef, veal and lamb rose by approximately 1 percent. For pork a 1 percent decrease was recorded, while beef consumption rose 5 percent. There was a slight decrease in the average consumer price of meat. For pork, a 5 percent decrease was registered, despite price rises during the last quarter of the year. During the first five months this year meat prices have increased slightly.

The proportion of domestically produced meat amounted to 74 percent of total beef and veal consumption and 100 percent for pork. Exports accounted for about 10 percent of production, which was on par with 1998. Imports continued to rise by around 10-20 percent depending on meat category. The U.S. has next to no meat trade with Sweden.

In Sweden the food industry is the second largest branch in terms of production value. The meat sector is the largest subsector accounting for almost a third of the food industry's sales value. Since EU accession, the meat sector has been going through massive reorganization, driven by increased competition associated with the open EU market. Prospects for expansion exist mainly in the area of exports. The struggle to increase cost-effectiveness continues and several mergers, especially within the cooperative industry (the SCAN companies - the market leaders) have taken place. On 1 January 1999 the SCAN-companies merged into Swedish Meats and thereby became one of Sweden's largest food companies, with sales of around SEK 9 billion (1.1 billion USD).

Swedish farmers are handicapped by higher taxes and stricter animal welfare regulations compared to other EU member state farmers. This forces the meat industry to pay higher farm gate prices than the EU average, in turn decreasing their margins. Consequently the sector is under a financial strain and production is expected to decrease. According to Swedish Meats, domestic meat production increased by 3 percent in 1999 to 556 thousand tons (beef up slightly, pork down 2 percent, mutton up 10 percent). Beef production is estimated to increase 1 percent in 2000 and decrease 2 percent in 2001. Pork production is expected to fall in 2000 by 11 percent and then stabilize in 2001. However, in the long term Swedish pork production and exports are expected to increase.

Consumption of meat and meat products in Sweden is estimated by the Swedish Board of Agriculture at SEK 34 billion (USD 4.1 billion) and has increased since 1990, mainly due to decreasing relative prices for meat. The consumption of imported meats has also increased. Some 25 percent of beef consumption is imported and 14 percent of pork consumption. Most meat imports are sourced within the EU. Some choice cuts of beef are imported from the U.S. for the restaurant trade but no beef for retail.


Exchange rates used:
1997: 1 USD= 7.64 SEK
1998: 1 USD= 7.95 SEK
1999: 1 USD= 8.26 SEK

## Cattle

### Import Market

The import of live animals is very limited due to the voluntary rigid health requirements Swedish farmers have agreed to maintain since the accession to the EU in 1995. The ambition is to maintain the excellent health status in Sweden, despite the open market of the union. However, the beef market has increasingly relied on imports, which in 1999 accounted for 25 percent of the market valued at SEK 5.7 billion or $ 690 million. Since 1987, imported beef has taken a growing share of sales. Before Sweden was a net exporter of beef. The consumption of veal is low and Sweden is more than self-sufficient. Growth in beef imports will likely continue as domestic production is expected to decrease. Sweden is thus more a market than competitor with regards to beef, although at the moment the US has virtually no presence on the market. High quality imported beef has won an important share of the catering market but is also more and more visible at the retail level. However, Swedish consumers still prefer Swedish meat. The Swedish consumer's idea of food quality is not just a matter of price, taste and nutritional value – consumers are also concerned with how food is produced. The use of antibiotics and hormones to promote growth in livestock is generally not perceived as a wholesome way to produce food. When asked, the average Swedish consumer also does not find the use of genetically modified ingredients particularly appealing. Nonetheless, price is arguably a very strong factor to most consumers. A small portion of the production (2-3 percent) is organic and the market for organic meat grows strongly. Domestic production covers only 50 percent of demand.

### Production

Beef production in Sweden is traditionally based on dairy cattle to 70-75 percent. Therefore, the EU milk quotas are the major regulator of cattle stocks and beef production. The general trend in dairy cattle population is declining and although milk production is maintained, beef production is expected to decrease. In 1999, a total of 34,000 establishments (42 percent of all farm establishments and 2,600 less than 1998) formed the base of production and the average cattle herd consisted of 50.4 head. As in the rest of the EU, the trend is in the direction of increasing herd sizes.

As mentioned earlier, breeding of bulls and steers for slaughter in Sweden is to a large extent based on dairy cattle. In order to increase the interest in beef production among dairy farmers, and to improve the quality of Swedish beef, Swedish Meats and the Swedish Dairy Cooperative Association Svensk Mjolk recently established a company (KRIS), which task will be to improve the counseling to dairy producers.

Expectations for 2000 are that beef production will increase by 1 percent to 141,000 tons. In 2001 beef production is expected to decrease by 2 percent to 138 tons. However, forecasts are somewhat more unsure, as with the Agenda 2000 policies, a greater portion of the farmer's income is detached from production – therefore slaughter weights are more difficult to predict.

### Meat Industry

On January 1, 1999, a new Swedish food giant was established when a majority of the farmer-owned cooperative slaughtering, cutting and meat processing associations (the previous Scan Group) merged into Swedish Meats. Swedish Meats, with a turn-over of roughly SEK 10 billion ($ 1.2 billion) and 6,000 employees is one of Sweden's most important food industries. The merger, which was a major step in adjusting to the more international market, brought over 70 percent of slaughtering, and one third of cutting and processing under the same roof. One association with 5 percent of slaughtering, which had already launched its own private label and wished to focus on local markets, chose to remain independent. In addition there are several private actors in the sector, as can be seen in the market share table below. During 1999 Scan invested a lot of money in marketing activities for processed meat. So far the activities have not payed off and the financial situation for Swedish Meats is bad.

**Consumption**

Swedes eat more meat than ever and consumption of beef has increased by 20 percent in the last decade. The main reason is declining prices driven by domestic policies in the early 90's and accession to the EU - and the CAP - in 1995. The BSE crises did not affect consumption adversely in Sweden, thanks to trust in Swedish production and quality control. Instead beef consumption increased, driven by still lower prices. Compared to other foods, meats have become relatively cheaper. The consumer price for beef was in 1999, 28 percent below the reference level of 1990, whereas the general food index decreased by 1 percent and the consumer price index increased by 24 percent. The per capita beef consumption in Sweden was 21.4 kg which is 1.8 kg more than the EU average.

The Swedish economy is presently in a phase of strong growth, in 1999 GDP growth was 3.8 percent and is expected to reach 5.5 percent this year. Swedish households are optimistic about their economy and private expenditure is increasing – which should act favorably for meat consumption. Private consumption is expected to increase also in 2000. Beef consumption is forecast to increase slightly in 2000 to 192,000 tons. In 2001, beef consumption is expected to increase further. Prices are expected to be stable at the same time as pork prices are expected to increase, put increasingly competitive compared to pork . The increase in product range with imported meats and meat products is another positive factor, encouraging a general increase in meat consumption.

The strong and stable trend in food consumption is the health concern, whereas concern for the environment, although still an issue, was bigger in the 1980's. According to a study of food habits, 80 percent is eaten at home but less and less time is put into preparing food – only 15 minutes is allowed for week days. The time constraint rules out many beef cuts and sales of ready-to-eat foods are increasing. Frozen dinners are today a big product, showing explosive growth.

The vegetarian trend has been exaggerated by media, less than 5 percent of the population is vegetarian and is not expected to grow as for many it is rather a phase in life than a lifetime commitment.

**Policy**

As an EU member, Sweden adheres to the Common Agricultural Policy (CAP). For more detail, please refer to the 2000 EU Annual Livestock Report (E20079). However, in the accession negotiations, Sweden succeeded in retaining a stricter salmonella control. Since September 1, 1995, Sweden has required that fresh beef, veal, pork and poultry meat imported from third countries be tested for salmonella in the establishment of origin according to the EU Council Decision 8108/95. Further rules for imports are laid down in the EU Council Decisions 8107/95 and 8034/95. Shipments of imported meat none-the-less contaminated (as found in several French shipments in 1997) are to be destroyed or sent back. This means that importing meat can be associated with high costs.

Agenda 2000 CAP reform came into effect in January 2000. The Board of Agriculture calculates that profitability has improved in the animal sector following reform. The original aim of the reform was to reduce production, however the watered-down outcome of Agenda 2000 will not likely achieve this. The Board of Agriculture does not expect any major change in production caused by the reform, although for the meat sector, extensive production is favored, which is positive for Sweden. The main difference to earlier policies is that a greater portion of farmers' income is comprised of direct support. For example, the support portion of intake for steers has increased from 29 to 49 percent and for bulls from 19 to 38 percent. This is achieved by a 20 percent cut in support prices over three years, increases in existing animal premia at maintained quota (which for Sweden have been increased back to 250,000 head as agreed at accession), creation of a new slaughter premium and stricter criteria for extensification premia, a new intervention system and additional national envelopes for direct aid to the sector. The GOS favors extensive production of high quality beef with secondary environmental benefits associated with a larger portion of grazing land. In total, this distance production somewhat from market fluctuations. In addition, the market regulating tools available, private storage and intervention, are weaker than before.

Sweden does not approve of the use of hormones in domestic beef production. Although the GOS usually agrees that issues should be supported scientifically, in areas where consumer confidence is at stake, it feels that public support is of greater importance. In the present (WTO beef hormone) dispute, Sweden has pushed for generous compensation to the US, but it will probably side with other member states in denying access to US beef before internal EU risk studies are completed and until additional domestic consensus among several critical groups is achieved.

In line with the Swedish position against export subsidies of live animals, the GOS has increased funds for animal welfare issues, focusing on animal transport and research on EHEC (*Enterohemorrhagisk Escherichia coli*). The occurrence of EHEC increased dramatically in Sweden over the past few years and the GOS has declared the minimizing of EHEC contamination as high priority. From an average of 3 human cases a year there were 100 in a year. In 1998 and 1999 the occurrence dropped again . An investigation concluded in 1997 that 1.2 percent of cattle herds are contaminated with EHEC, although it has not been found in meat.

The Nordic countries have successfully limited the spread of Bovine Virus Diarrhea, BVD, through a systematic program which started in the early 90's.

Breeding with Belgian Blue (BB) was considered illegal in Sweden as the variety suffers from genetic defects that can cause suffering for the animal, however this ban was not sanctioned by the EU courts and Sweden was forced to allow breeding. However, the Swedish farmers associations and cooperative slaughter houses have agreed to boycott the breed.

In order to avoid the costly administration of cow passes, the GOS gave Svensk Mjolk, the Swedish Dairy Cooperative Organization, the mandate to establish a national cow register which is now in place.

The voluntary country of origin labeling regulations for beef (frozen or fresh but not processed) came into effect 1 July 1998. Labels must be approved by the National Food Administration and verifiable with documentation. In May this year EU member states agreed to a two step implementation of the compulsory country of origin labeling regulations. From 1 September 2000 labels should declare where the animal was slaughtered and the cuts prepared. From 2002 the industry will have to be able to supply further information, detailing the member states where the animal was born, raised and slaughtered. However, Sweden wants to go ahead and has applied for permission to implement complete labeling for domestic produced meat in advance. If approved by EU authorities, complete labeling could be in place in Sweden as early as in September 2000. The new regulations means higher costs for the industry, which in the end have to be paid by the consumers. According to the National Food Administration however, Swedish consumers are positive to the labeling system and are willing to pay more for labeled meat. If the beef labeling system works well, it is possible that such regulations will be implemented for other meat as well in the future, according the National Food Administration.

The Swedish parliament established a goal in 1994 that 10 percent of farmland should be organically managed by the year 2000. The Board of Agriculture has again been commissioned to formulate a new goal for organic production. The proposal stipulates that 20 percent of cattle and 5 percent of swine should be produced organically by 2005. Organic production is envisaged to be supported, as today, with funds from the environmental frame.

**Marketing**

All meat exported to the EU and thus also to Sweden must be sourced from an EU-approved establishment. A list of establishments is available on the USEU homepage at http://www.useu.be/agri.html. Import licenses, administered by the Board of Agriculture, are required for all imports exceeding 250 kg. The EU tariffs apply on the goods.

While export opportunities for U.S. meat producers to Sweden are limited, the demand from mainly restaurants for a tastier and fatter meat is increasing and may be an area where hormone-free beef from the U.S. could win market entry.

As seen in consumption figures below, the market for ready-to-eat foods and exclusive delicatessen is growing in Sweden and there may well be openings also for high value U.S. meat products.

The market for organically produced, KRAV-certified meat (KRAV is a member of IFOAM, International Federation of Organic Agriculture Movements and carries out voluntary certification according to specified standards - also possible for imports,), both beef, veal included, and pork is growing in Sweden. Production cannot meet demand - and will not for some time as the numbers of organic farmers are declining despite the high demand for their produce. Domestic producers fear that imported produce has an opening to the Swedish organic market.

An array of quality labels or brands have emerged on the Swedish meat market, some aspiring to capture the Swedish consumers’ concern for the environment and animal welfare, others simply to capture those who are willing to pay extra for good meat quality. The wholesale group D&D have through their import company Nordic Meat Partner launched a private label “Prime” for the marketing of imported meats. The retail chain ICA has its own brand ”Sunda”(which means healthy) for so called grazing meat and is an example of the former marketing approach. This meat must fill certain quality requirements regarding the production system as well as meat quality and receives a price premium (SEK 1.00-2.75 per kg or 13-35 cents/kg). “Scan Excellent”- from young cattle and ”Scan Gourmet” - from beef cattle and “Selected&Exquisite” - guaranteed tender, are examples of the latter. The concepts "Scan Gourmet" and "Scan Excellent" have been upgraded in 1999 and the porpotion of brand name meat deliveries within Swedish Meats have increased by 5-10 percent. Retail representatives say that it is still mainly the fact that it is Swedish meat that is decisive for most customers although ICA (major retail chain) is now putting some effort into popularizing imported beef. ICA stresses that they require the same strict quality aspects (animal welfare - no Belgian Blue, restrictive antibiotics use and successful salmonella control) on imported meat.

The discussion of the need for more quality information on beef at retail level continues - labeling needs to be improved. In addition, products need to be developed to address the time-pressed food preparation of today –and tomorrow.

## Swine

### Import market

Import of pork has increased steadily over the past decade and will continue to do so as domestic production is expected to decrease, at least in the short term. In 1999 total pork imports increased by 10 percent to 38,200 tons valued at SEK 1.15 billion ($ 140 million), although processed pork showed a slower uptrend at 3 percent. Imports will continue to grow as production is forecast to drop in coming years. Exports of pork increased by 20 percent in 1999. Scan is now established in the UK supermarket chain Sainsbury’s.

### Production

The number of pork producers has been halved since 1990 while the number of hogs per operation has increased by 75 percent. The average herd size increased from 119 in 1990 to 252 hogs in 1999. Production has increased slightly each year since 1991 to 1998. In 1999 though, production decreased by 2 percent due to extremely low prices in 1998 and 1999. The first half of year 2000 has shown a substantial decrease in pork production (15%), for the whole year the production is expected to decrease by 11 percent. As prices recover the production decrease is expected to cease. The forecast for year 2001 is unchanged production compared to 2000.

The number of hog farms was 5 thousand in 1999. A small portion of production (10 500 hogs or 0.3 percent) is KRAV-certified (see above) and is expected to increase due to increased demand. As for beef production and demand do not keep pace. Supply shortage is one of the reasons why the industry is putting off the introduction of cured meat on the market. This year demand for organic hogs is expected to reach 30 000.

Since 1990, pork production has increased by 20 percent in volume. Pork production decreased in 1999 - 3.8 million hogs were slaughtered and production decreased by 2 percent to 325 thousand tons, which was just over consumption at 322 thousand tons. Producer prices for pork in Sweden and elsewhere fluctuated considerably over the year. Supply levels were high at the beginning of the year, which resulted in an increased export volume and lower prices. During the second half of the year, demand was strong and slaughtering levels on the Swedish market were low, which meant that the price level could be raised. For the whole year 1999 Swedish pork prices decreased by 5 percent compared to 1998. The market recovery has continued during year 2000 and in July 2000 the highest price level since early 1998 was reached. The market is now considered as relatively strong. Breeding sow production however, has been affected with a severe drop in profitability and and the pressure is accelerating structural adjustment. Integrated production is increasing – including feed production and preparation. Effort is put into the development of new production methods to improve profitability and the US model is being studied – although in Sweden it is still size and standard which are the main areas to improve.

As a consequence of the improved market situation, the declining trend in Swedish production is expected to turn and stabilize next year. Sow slaughtering increased in 1999 but the prospect for 2000 is a reduction of 10 percent. Expectations for 2000 are further decreased production- down to 286 thousand tons. This means that self sufficiency is dropping and opportunities for imports are improving.

**Consumption**

Consumption of pork has increased by almost 25 percent since 1990. Pork meat intake fell in 1999 (down 1%) to 36.4 kg per capita. The positive long term trend is partly explained by lower consumer prices, but also by the efforts put into quality and animal welfare in production, giving pork a better image and greater consumer acceptance. The Swedish development within production systems, including "salmonella-free" production and ban against antibiotics for growth promotion, are in line with values and demands of a growing consumer opinion. Nonetheless, consumption is expected to increase by 5 percent in 2000 and none in 2001.

**Policy**

Agenda 2000 does not include a reform of the pigmeat regime other than reduced funds for export subsidies. The reduction in cereal price was considered to make EU production more independently competitive on the international markets. For general information on the EU pig regime and import quota details, please refer to the 2000 EU Livestock report (E20079).

# Statistical Tables

## PS&D Tables

### Cattle

| PSD Table | | | | | | |
|---|---|---|---|---|---|---|
| Country | Sweden | | | | | |
| Commodity | Meat, Beef and Veal | | | | (1000 MT CWE)(1000 HEAD) | |
| | Revised | 1999 | Preliminary | 2000 | Forecast | 2001 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | 01/1999 | | 01/2000 | | 01/2001 |
| Slaughter (Reference) | 505 | 518 | 518 | 514 | 0 | 510 |
| Beginning Stocks | 0 | 0 | 0 | 0 | 0 | 0 |
| Production | 140 | 140 | 144 | 141 | 0 | 138 |
| Intra EC Imports | 39 | 44 | 39 | 45 | 0 | 46 |
| Other Imports | 8 | 9 | 8 | 9 | 0 | 10 |
| TOTAL Imports | 47 | 53 | 47 | 54 | 0 | 56 |
| TOTAL SUPPLY | 187 | 193 | 191 | 195 | 0 | 194 |
| Intra EC Exports | 6 | 6 | 7 | 6 | 0 | 6 |
| Other Exports | 1 | 1 | 1 | 1 | 0 | 1 |
| TOTAL Exports | 7 | 7 | 8 | 7 | 0 | 7 |
| Human Dom. Consumption | 180 | 186 | 183 | 192 | 0 | 187 |
| Other Use, Losses | 0 | 0 | 0 | 0 | 0 | 0 |
| TOTAL Dom. Consumption | 180 | 186 | 183 | 192 | 0 | 187 |
| Ending Stocks | 0 | 0 | 0 | 0 | 0 | 0 |
| TOTAL DISTRIBUTION | 187 | 193 | 191 | 195 | 0 | 194 |
| Calendar Yr. Imp. from U.S. | 0 | 0 | 0 | 0 | 0 | 0 |
| Calendar Yr. Exp. to U.S. | 0 | 0 | 0 | 0 | 0 | 0 |

**Beef and Veal**

| PSD Table | | | | | | |
|---|---|---|---|---|---|---|
| Country | Sweden | | | | | |
| Commodity | Animal Numbers, Cattle | | | | (1000 HEAD) | |
| | Revised | 1999 | Preliminary | 2000 | Forecast | 2001 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | 01/1999 | | 01/2000 | | 01/2001 |
| Total Cattle Beg. Stks | 1665 | 1713 | 1610 | 1688 | 0 | 1646 |
| Dairy Cows Beg. Stocks | 445 | 449 | 441 | 444 | 0 | 440 |
| Beef Cows Beg. Stocks | 169 | 165 | 155 | 160 | 0 | 155 |
| Production (Calf Crop) | 506 | 499 | 518 | 496 | 0 | 495 |
| Intra EC Imports | 0 | 0 | 0 | 0 | 0 | 0 |
| Other Imports | 0 | 0 | 0 | 0 | 0 | 0 |
| TOTAL Imports | 0 | 0 | 0 | 0 | 0 | 0 |
| TOTAL SUPPLY | 2171 | 2212 | 2128 | 2184 | 0 | 2141 |
| Intra EC Exports | 6 | 6 | 4 | 4 | 0 | 4 |
| Other Exports | 0 | 0 | 0 | 0 | 0 | 0 |
| TOTAL Exports | 6 | 6 | 4 | 4 | 0 | 4 |
| Cow Slaughter | 134 | 192 | 140 | 202 | 0 | 200 |
| Calf Slaughter | 30 | 38 | 32 | 42 | 0 | 40 |
| Other Slaughter | 341 | 288 | 346 | 290 | 0 | 290 |
| Total Slaughter | 505 | 518 | 518 | 534 | 0 | 530 |
| Loss | 50 | 0 | 25 | 0 | 0 | 0 |
| Ending Inventories | 1610 | 1688 | 1581 | 1646 | 0 | 1607 |
| TOTAL DISTRIBUTION | 2171 | 2212 | 2128 | 2184 | 0 | 2141 |
| Calendar Yr. Imp. from U.S. | 0 | 0 | 0 | 0 | 0 | 0 |
| Calendar Yr. Exp. to U.S. | 0 | 0 | 0 | 0 | 0 | 0 |

**Swine**

| PSD Table | | | | | | |
|---|---|---|---|---|---|---|
| Country | Sweden | | | | | |
| Commodity | Animal Numbers, Swine | | | | (1000 HEAD) | |
| | Revised | 1999 | Preliminary | 2000 | Forecast | 2001 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | 01/1999 | | 01/2000 | | 01/2001 |
| TOTAL Beginning Stocks | 2220 | 2115 | 2085 | 2089 | 0 | 2084 |
| Sow Beginning Stocks | 253 | 220 | 237 | 200 | 0 | 200 |
| Production (Pig Crop) | 3784 | 3737 | 3554 | 3333 | 0 | 3330 |
| Intra EC Imports | 0 | 0 | 0 | 0 | 0 | 0 |
| Other Imports | 0 | 0 | 0 | 0 | 0 | 0 |
| TOTAL Imports | 0 | 0 | 0 | 0 | 0 | 0 |
| TOTAL SUPPLY | 6004 | 5852 | 5639 | 5422 | 0 | 5414 |
| Intra EC Exports | 6 | 6 | 5 | 5 | 0 | 5 |
| Other Exports | 0 | 0 | 0 | 0 | 0 | 0 |
| TOTAL Exports | 6 | 6 | 5 | 5 | 0 | 5 |
| Sow Slaughter | 132 | 132 | 125 | 119 | 0 | 120 |
| OTHER SLAUGHTER | 3781 | 3625 | 3429 | 3214 | 0 | 3215 |
| Total Slaughter | 3913 | 3757 | 3554 | 3333 | 0 | 3335 |
| Loss | 0 | 0 | 0 | 0 | 0 | 0 |
| Ending Inventories | 2085 | 2089 | 2080 | 2084 | 0 | 2074 |
| TOTAL DISTRIBUTION | 6004 | 5852 | 5639 | 5422 | 0 | 5414 |
| Calendar Yr. Imp. from U.S. | 0 | 0 | 0 | 0 | 0 | 0 |
| Calendar Yr. Exp. to U.S. | 0 | 0 | 0 | 0 | 0 | 0 |

**Swine Meat (Pork)**

| PSD Table | | | | | | |
|---|---|---|---|---|---|---|
| Country | Sweden | | | | | |
| Commodity | Meat, Swine | | | | (1000 MT CWE)(1000 HEAD) | |
| | Revised | 1999 | Preliminary | 2000 | Forecast | 2001 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | 01/1999 | | 01/2000 | | 01/2001 |
| Slaughter (Reference) | 3913 | 3757 | 0 | 3333 | 0 | 3335 |
| Beginning Stocks | 0 | 0 | 0 | 0 | 0 | 0 |
| Production | 326 | 325 | 298 | 286 | 0 | 285 |
| Intra EC Imports | 50 | 45 | 69 | 50 | 0 | 50 |
| Other Imports | 0 | 0 | 1 | 1 | 0 | 1 |
| TOTAL Imports | 50 | 45 | 70 | 51 | 0 | 51 |
| TOTAL SUPPLY | 376 | 370 | 368 | 337 | 0 | 336 |
| Intra EC Exports | 21 | 31 | 14 | 19 | 0 | 20 |
| Other Exports | 12 | 17 | 7 | 12 | 0 | 15 |
| TOTAL Exports | 33 | 48 | 21 | 31 | 0 | 35 |
| Human Dom. Consumption | 343 | 322 | 347 | 306 | 0 | 301 |
| Other Use, Losses | 0 | 0 | 0 | 0 | 0 | 0 |
| TOTAL Dom. Consumption | 343 | 322 | 347 | 306 | 0 | 301 |
| Ending Stocks | 0 | 0 | 0 | 0 | 0 | 0 |
| TOTAL DISTRIBUTION | 376 | 370 | 368 | 337 | 0 | 336 |
| Calendar Yr. Imp. from U.S. | 0 | 0 | 0 | 0 | 0 | 0 |
| Calendar Yr. Exp. to U.S. | 0 | 0.3 | 0 | 0.5 | 0 | 0.5 |

## Trade Matrices

### Cattle

| | | | | |
|---|---|---|---|---|
| Export Trade Matrix | | | | |
| Country | Sweden | | Units: | head |
| Commodity | Animal Numbers, Cattle | | Partial Begin | |
| | | | Partial End | |
| Exports for: | 1998 | 1999 | 1999 | 2000 |
| | Full | Full | Partial | Partial |
| U.S. | 0 | 0 | | |
| Others | | | | |
| Denmark | 4364 | 6909 | | |
| Lithuania | 243 | 0 | | |
| Poland | 121 | 1 | | |
| Latvia | 27 | 0 | | |
| Norway | 13 | 13 | | |
| Germany | | 1137 | | |
| Neherlands | | 688 | | |
| Estonia | | 4 | | |
| Italy | | 34 | | |
| | | | | |
| Total for Others | 4768 | 8786 | 0 | 0 |
| Others not Listed | | 10 | | |
| Grand Total | 4768 | 8796 | 0 | 0 |

| | | | | |
|---|---|---|---|---|
| Import Trade Matrix | | | | |
| Country | Sweden | | Units: | head |

| Commodity | Animal Numbers, Cattle | | Partial Begin | |
|---|---|---|---|---|
| | | | Partial End | |
| Exports for: | 1998 | 1999 | 1999 | 2000 |
| | Full | Full | Partial | Partial |
| U.S. | 0 | 0 | | |
| Others | | | | |
| Canada | 5 | | | |
| Germany | | 6 | | |
| Total for Others | 5 | 6 | 0 | 0 |
| Others not Listed | 0 | 0 | | |
| Grand Total | 5 | 6 | 0 | 0 |

**Beef and Veal**

| Beef & veal Exports | Mton | 000 SEK | 000 USDollars | 1997(Mtons) | Change in volume |
|---|---|---|---|---|---|
| HS0201 | 935 | 23591 | 2856 | | |
| HS0202 | 978 | 22628 | 2739 | | |
| Total Fresh&frozen | 1913 | 46219 | 5596 | 1733 | 10.4 |
| Processed | 5351 | 140505 | 17010 | 5943 | -10.0 |
| Grand Total | 7264 | 186724 | 22606 | 7676 | -5.4 |

| Export Trade Matrix | | | | |
|---|---|---|---|---|
| Country | Sweden | | Units: | metric tons |

| Commodity | Meat, Beef and Veal | | Partial Begin | |
|---|---|---|---|---|
| | | | Partial End | |
| Exports for: | 1998 | 1999 | 1999 | 2000 |
| | Full | Full | Partial | Partial |
| U.S. | 0 | 0 | | |
| Others | | | | |
| Finland | 2484 | 3784 | | |
| Germany | 728 | 792 | | |
| United Kingdom | 462 | 480 | | |
| France | 459 | 409 | | |
| Spain | 453 | 248 | | |
| Denmark | 286 | 245 | | |
| Russia | 127 | 35 | | |
| Italy | 85 | 322 | | |
| | | | | |
| | | | | |
| Total for Others | 5084 | 6315 | 0 | 0 |
| Others not Listed | 2592 | 949 | | |
| Grand Total | 7676 | 7264 | 0 | 0 |

| Beef & veal Imports | Mton | 000 SEK | 000 USDollars | 1997(Mtons) | Change in volume |
|---|---|---|---|---|---|
| HS0201 | 20738 | 674251 | 81628 | | |
| HS0202 | 10986 | 352241 | 42644 | | |
| Total Fresh&frozen | 31724 | 1026492 | 124273 | 26772 | 18.5 |
| Processed | 11079 | 363299 | 43983 | 10304 | 7.5 |
| Grand Total | 42803 | 1389791 | 168256 | 37076 | 15.4 |

| Import Trade Matrix | | | | |
|---|---|---|---|---|
| Country | Sweden | | Units: | metric tons |
| Commodity | Meat, Beef and Veal | | Partial Begin | |

| | | | Partial End | |
|---|---|---|---|---|
| Exports for: | 1998 | 1999 | 1999 | 2000 |
| | Full | Full | Partial | Partial |
| U.S. | 1 | 0 | | |
| Others | | | | |
| Ireland | 12391 | 9214 | | |
| Denmark | 8246 | 9540 | | |
| Germany | 3300 | 8883 | | |
| Finland | 3004 | 3616 | | |
| Netherlands | 2336 | 4390 | | |
| Poland | 1723 | 1495 | | |
| Hungary | 950 | 1038 | | |
| Uruguay | 857 | 953 | | |
| New Zealand | 538 | 516 | | |
| Brazil | 302 | 761 | | |
| Total for Others | 33647 | 40406 | 0 | 0 |
| Others not Listed | 3428 | 2397 | | |
| Grand Total | 37076 | 42803 | 0 | 0 |

**Swine**

| Export Trade Matrix | | | | |
|---|---|---|---|---|
| Country | Sweden | | Units: | head |

| Commodity | Animal Numbers, Swine | | Partial Begin | |
|---|---|---|---|---|
| | | | Partial End | |
| Exports for: | 1998 | 1999 | 1999 | 2000 |
| | Full | Full | Partial | Partial |
| U.S. | 0 | 0 | | |
| Others | | | | |
| Germany | 5796 | 13386 | | |
| Denmark | 971 | 112 | | |
| Lithuania | 83 | | | |
| Yugoslavia | 49 | | | |
| Croatia | 44 | | | |
| Slovenia | 38 | | | |
| Poland | | 38 | | |
| Japan | | 25 | | |
| | | | | |
| | | | | |
| Total for Others | 6981 | 13561 | 0 | 0 |
| Others not Listed | 23 | 206 | | |
| Grand Total | 7004 | 13767 | 0 | 0 |

| Import Trade Matrix | | | | |
|---|---|---|---|---|
| Country | Sweden | | Units: | head |
| Commodity | Animal Numbers, Swine | | Partial Begin | |
| | | | Partial End | |

| Exports for: | 1998 | 1999 | 1999 | 2000 |
|---|---|---|---|---|
| | Full | Full | Partial | Partial |
| U.S. | 0 | | | |
| Others | | | | |
| Denmark | 24 | | | |
| Norway | | 15 | | |
| Total for Others | 24 | 15 | 0 | 0 |
| Others not Listed | 0 | 0 | | |
| Grand Total | 24 | 15 | 0 | 0 |

**Swine Meat (Pork)**

| Pork Exports | Mton | 000 SEK | 000 USDollars | 1998 (Mtons) | Change in volume |
|---|---|---|---|---|---|
| HS0203 | 39026 | 483048 | 58480 | 31284 | 24.7 |
| Processed | 3281 | 82652 | 10006 | 3912 | -16.1 |
| Total | 42307 | 565700 | 68487 | 35196 | 8.6 |

| Export Trade Matrix | | | | |
|---|---|---|---|---|
| Country | Sweden | | Units: | metric tons |
| Commodity | Meat, Swine | | Partial Begin | |
| | | | Partial End | |
| Exports for: | 1998 | 1999 | 1999 | 2000 |
| | Full | Full | Partial | Partial |
| U.S. | 456 | 325 | | |

| | | | | |
|---|---|---|---|---|
| Others | | | | |
| Denmark | 5068 | 5979 | | |
| France | 4945 | 5140 | | |
| United Kingdom | 3984 | 5288 | | |
| Italy | 2233 | 4296 | | |
| Russia | 3390 | 5513 | | |
| Finland | 1869 | 2204 | | |
| Germany | 1451 | 3035 | | |
| Hungary | 1279 | 520 | | |
| South Korea | 492 | 2076 | | |
| Japan | 353 | 1026 | | |
| Total for Others | 25064 | 35077 | 0 | 0 |
| Others not Listed | 9676 | 6905 | | |
| Grand Total | 35196 | 42307 | 0 | 0 |

| Pork Imports | Mton | 000 SEK | 000 USDollars | 1998 (Mtons) | Change in volume |
|---|---|---|---|---|---|
| HS0203 | 28884 | 869525 | 105269 | 25408 | 13.7 |
| Processed | 9312 | 286377 | 34670 | 9020 | 3.2 |
| Total | 38196 | 1155902 | 139940 | 34428 | 16.9 |

| | | | | |
|---|---|---|---|---|
| Import Trade Matrix | | | | |
| Country | Sweden | | Units: | metric tons |
| Commodity | Meat, Swine | | Partial Begin | |
| | | | Partial End | |
| Exports for: | 1998 | 1999 | 1999 | 2000 |
| | Full | Full | Partial | Partial |
| U.S. | 0 | 0 | | |
| Others | | | | |
| Denmark | 25331 | 24521 | | |

| | | | | |
|---|---|---|---|---|
| Netherlands | 1775 | 2067 | | |
| Ireland | 1584 | 883 | | |
| Finland | 1435 | 1832 | | |
| Germany | 1297 | 5160 | | |
| Belgium, Lux | 822 | 0 | | |
| United Kingdom | 740 | 1011 | | |
| Italy | 541 | 559 | | |
| Hungary | 429 | | | |
| Spain | 187 | | | |
| Total for Others | 34141 | 36033 | 0 | 0 |
| Others not Listed | 287 | 2163 | | |
| Grand Total | 34428 | 38196 | 0 | 0 |

**Cattle Population**

| Cattle in Meat Production, thousands | | | | |
|---|---|---|---|---|
| Cattle type/ Year | 1990 | 1995 | 1998 | 1999 |
| Dairy cows | 576 | 482 | 449 | 449 |
| Suckler cows | 75 | 157 | 170 | 165 |
| Heifers, bulls, steers | 543 | 596 | 611 | 600 |
| Calves | 524 | 542 | 509 | 499 |
| TOTAL CATTLE | 1718 | 1777 | 1739 | 1713 |

**Consumption**

| Per Capita Meat Consumption in Sweden | | | | |
|---|---|---|---|---|
| | | | | |
| Meat/ kg per capita | 1985 | 1990 | 1995 | 1999 |
| Beef & veal | 16.0 | 16.9 | 18.7 | 21.4 |
| Mutton & lamb | 0.7 | 0.8 | 0.8 | 0.9 |
| Pork | 29.9 | 30.2 | 35.3 | 36.4 |
| Poultry | 4.8 | 5.9 | 8.7 | 10.3 |
| Total | 51.4 | 53.8 | 63.5 | 69.0 |

| Consumption of Meat and Meat products, per capita consumption in kg | | | | | | |
|---|---|---|---|---|---|---|
| | | | | | | |
| | 1970 | 1980 | 1990 | 1999 | Change on year | |
| | | | | | 98/99, % | |
| Farm slaughter (cattle, swine and sheep) | 1.0 | 0.4 | 0.4 | 0.3 | 50 | % |
| Beef & veal - fresh and frozen | | | 6.7 | 9.5 | 6 | % |
| Pork - fresh and frozen | | | 10.3 | 15.2 | -3 | % |
| Mutton - fresh and frozen | 0.5 | 0.6 | 0.7 | 0.7 | 0 | % |
| Poultry - fresh and frozen | | | 5.4 | 10.2 | 15 | % |
| Reindeer - fresh and frozen | 0.2 | 0.0 | 0.3 | 0.1 | 0 | % |
| Game - fresh and frozen | | | 2.6 | 2.0 | 0 | % |
| Liver, kidney, tongue | 1.0 | 0.4 | 0.5 | 0.7 | 0 | % |
| TOTAL meats and offals | 25.4 | 28.0 | 27.3 | 38.0 | 4 | % |
| Hams | 2.4 | 3.7 | 4.6 | 5.7 | -1 | % |
| Sausages | 18.1 | 18.2 | 14.7 | 16.3 | -2 | % |
| TOTAL charcuteries | 20.5 | 21.9 | 19.3 | 22.0 | -2 | % |
| Canned meat | 3.0 | 2.0 | 1.8 | 0.8 | 0 | % |
| Meat soups | 1.0 | 1.0 | 0.8 | 0.5 | 0 | % |
| Prepared meat products | 4.0 | 8.5 | 7.8 | 10.3 | 8 | % |
| TOTAL other meats | 49.9 | 58.4 | 54.4 | 70.3 | 2 | % |
| | | | | | | |

**Market Shares of Meat Companies**

| Slaughtering | |
|---|---|
| Company | Market shares 1999 |
| Swedish Meats | 72% |
| Scan KLS | 5% |
| Helsingborg | 6.5% |
| Skovde | 4% |
| Ugglarp | 2.6% |
| Bralanda | 2% |
| Lammhult | 1.5% |

| | |
|---|---|
| Others | 6.4% |

| Processed Meat Products | |
|---|---|
| Company | Market share 1999 |
| Scan Group | 29% |
| Samfod/Goman | 11.6% |
| Sardus | 7.8% |
| Atria/Lithells | 3.2% |
| ICA Handlarna | 3.4% |
| Others | 45% |