



THE WINE HUB

STRUCTURE,
REGULATION &
OPPORTUNITY

Understanding the
Swedish Wine Market

March 2026

How the Swedish culture affects wine sales

- 10.57M people, wine is the favorite alcoholic beverage with 44% before beer (32%) and spirits (18%)
- A strong consensus culture, Swedes avoid standing out (Jantelagen)
- Consumers rely heavily on **recommendations** from peers, media and influencers
- Trends can be clearly traced back to media and societal movements (the Santa Maria brand became popular in the 90s – Taco Friday)
- **Fewer market players and strong opinion leaders:** possibility to make a real impact with a relatively modest budget compared to larger markets

Regulations in alcohol marketing

- No POS activities in retail
- Alcohol advertising is highly restricted
- Media collaborations are allowed

This creates strong potential for:

- Media relations (wine journalists play a more important role than in many other markets)
- Consumer events
- Stakeholder relations (importers, the monopoly, educators, sommeliers)

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Distribution: not exclusively via the monopoly

- Distribution channels (approx. share):
- Hospitality: 12%
- Systembolaget (brick-and-mortar stores + online): approx. 72%
- Consumers purchasing via order assortment / importer fulfillment: 7%
- Online companies: approx. 2% – and growing

The market is changing

- **1995 – End of the monopoly at the import level (Vin & Sprit AB).** Today: 1,000+, with around 50 key players.
- **1995 – Free import to the on-trade.** Restaurants are no longer part of the monopoly structure.
- **2007 – Rosengren ruling (EU Court of Justice).** Swedish consumers are allowed to buy alcohol from other EU countries via mail order, under the principle of free movement of goods.
- 2007-2023 GREY ZONE
- **2023 – Swedish Supreme Court ruling.** Companies are allowed to sell and market alcohol online directly to Swedish consumers from abroad.
- **2025 – Farm sales legalized.** A limited reform allowing small-scale producers to sell directly to visitors.

Consumption trends

- Growth in low- and no-alcohol wines, lighter red wine styles
- Red wine still dominates, but is in decline
- Strong focus on sustainability



The State-run monopoly: Systembolaget

- Monopoly on retail sales for beverages above 3.5% alc.
- 452 physical stores + online store (15,000 products)
- 128 million store visits, 71 million online visits
- 1,150 importers (no direct contact to producers)
- 208 million liters of wine sold per year

- **25% organic wines**
- **More than 50% bag-in-box**
- Growing importance of smaller and eco-friendly packaging
- Wines are classified by color and country, not by price

Sales mix:

- 45.5% red wine
- 33.4% white wine
- 26.1% organic wine

The sourcing process

Purchasing strategy based on:

- Consumer trends
- Importers' suggestions

Requests for tender are published with very specific criteria

Samples are submitted via importers

Blind tastings are conducted and a winner is selected

- Ongoing quality follow-up



Product ranges

Fixed (Core) Range – 94%

- Available in all stores based on local demand; full range available online
- Tenders published four times per year
- Distribution adjusted twice per year based on consumer demand

Temporary Range – 3%

- Smaller volumes of exclusive products
- Available in selected stores; full range available online
- Weekly launches
- Tender-based process

Order Range – 3%

- Range controlled by suppliers, stored by the importer
- If demand is strong, products may qualify for the Fixed Range without a new tender process

Online stores

- Direct sales to Swedish consumers from other EU countries (mainly Denmark)
- Marketing to Swedish consumers is allowed
- **No monopoly, no tenders**
- Stores purchase from importers and producers directly

- **20% growth per year expected**
- Companies like Vinoteket (77% customer share) and Winefinder (15% value share), 90 in total
- Same prices as the monopoly
- Different selection than monopoly (no BIB): Wine Finder is for example the dominating market specialist in Bordeaux wines.
- Direct sales via sales from your vineyard: freegrapesociety.com, an opportunity to reach consumers without an importer



How is Swedish demand shaped?

- Through the monopoly's **Fixed Range** (wines available in physical stores)
- Through **by-the-glass** listings in restaurants (outside the monopoly)
- Through **journalists** and educational influencers

All these elements work together to shape demand.

How to enter the Swedish market

- First step: find an importer to represent you (free grape society is an alternative but is still a marginal sales channel, although growing)
- To do that, you can partner with your wine board and participate in their activities in Sweden.
- Email importers about your wine style, certifications and volume. Keep it short, no lengthy emails, no attachments, no tech sheets.
- Meet Swedish importers at major international wine fairs.

Conclusion

- Sweden is a highly regulated but transparent wine market where knowledge, trust, and media influence are key drivers of success.
- Multiple access points exist; and the market is becoming more open and dynamic over time.
- With the right importer and targeted communication, it is possible to build strong visibility and long-term presence in Sweden.
- Have patience and invest into Sweden. It takes time to create demand. BUT in our small and transparent market, the needle can be moved with comparatively little budget and effort.



THE
WINE
HUB

Strong Network

Access importers, restaurants, the monopoly, and media through us.

Nordic Reach

We're active in Sweden's four main wine-trade cities, Stockholm, Malmö, Gothenburg, and Umeå. We also organize events in Oslo, Norway.

Wine Expertise

We're 7 passionate sommeliers and wine lovers with backgrounds in marketing, sales, PR, journalism, events, and the restaurant industry.

Looking for an agency in the Nordics?

At The Wine Hub, we bring together **wine export communications and wine education under one roof**. The company was founded in 2021 by three well-known voices in Sweden's wine, restaurant, and media landscape, with the vision to create Sweden's most modern and comprehensive wine education.

Since then, The Wine Hub has expanded, adding a dedicated marketing and events department in 2024. Today, we design tailored communication activities for wine boards, including masterclasses and wine fairs, importer activation, marketing strategy, and PR.

WE REACH
90K
PEOPLE/MONTH
ON SOCIAL

**FUTURE
INDUSTRY
ACCESS**

Our sommelier students often move directly into the trade.

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