

STRUCTURE, REGULATION, OPPORTUNITY

Understanding the Swedish Wine Market



Let's talk about:

Understanding the Swedish Consumer

Distribution Channels & Regulations

The Market is Evolving

The 3 Things That Shape Demand

Tips: How to Enter the Market



44% Market Share for Wine

- 10.5M people
- Wine is favorite alcoholic beverage (44%)
- Highly regulated market
- Strong influence culture (why is that?)



TACOS



Basic
Tortilla Chips
Basic
Tortilla Chips
Basic
Tortilla Chips

Tortilla Chips
Tortilla Chips
Tortilla Chips
Tortilla Chips

Tortilla Chips
Tortilla Chips
Tortilla Chips
Tortilla Chips

Taco Tubs
Taco Tubs
Taco Tubs

Sweden is Efficient

- Few market players
- Clear opinion leaders
- Consumers rely heavily on recommendations
- Trends spread fast
- Real impact with modest budgets





Sweden is highly regulated

- limited opening hours
- no marketing activities



Alkohol kan skada din hälsa

Alcohol ads in Sweden

- no emotional or lifestyle images
- 100% facts
- rules don't apply to editorial writing

Positive Things About Regulation

- Strong role of wine journalists
- Importance of education & tastings
- High value of relationships



Distribution Channels

Did you know?

We have a monopoly market, but not a closed off one. Consumers can be reached via multiple routes.



Distribution Channels

- Systembolaget (stores + online): ~72%
- Hospitality: 12%
- Order assortment via importers: 7%
- Online stores (2%)



20% growth per year

Online Stores (2% in 2025)

Yes, online sales outside of the monopoly are allowed.

Here's how...



1995: Sweden joins the EU

- Import monopoly abolished
- Free import to restaurants
- 1,000+ importers (50 key players)



2007-2023

Operating in the grey zone

2007 Rosegren Ruling (EU Court of Justice)

Free movement of goods. Consumers may buy alc. from other EU countries via mail order.



2007-2023

Operating in the grey zone

2023 Supreme Court Ruling

EU companies outside Sweden may sell/market alcohol online directly to Swedish consumers



2025

Farm Sales. Finally!

- Limited direct sales by producers
- On-site only
- Strict conditions
- Symbolic but important



Systembolaget

The Monopoly

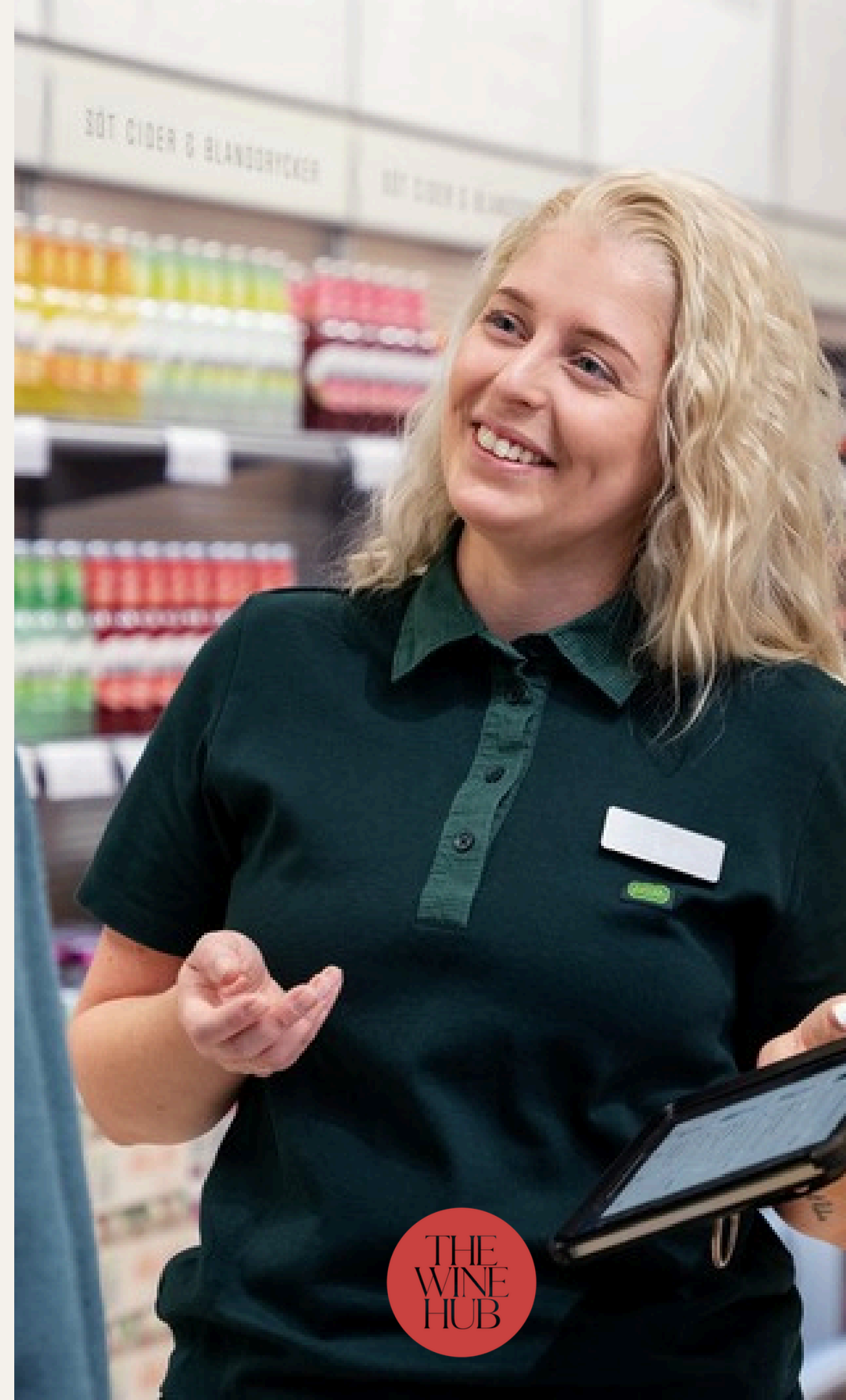
- Retail monopoly >3.5% ABV
- 452 stores + online shop
- SEK 39.4bn turnover



What Sells

The Monopoly

- 208M liters of wine sold
- 50% bag-in-box
- 26% organic wine. Eco-friendly packaging is big
- Red wine on top (45%) but slowly declining
- Lighter wine styles on trend



How Wine is Bought

The Monopoly

- Trend-driven strategy / importer offers
- Public tenders
- Blind tastings, a winner is picked



The Product Ranges

Fixed (Core) Range: 94%

Available nationwide, 4 tenders per year

Temporary Range: 3%

Limited volumes (exclusive, selected stores),
weekly launches

Order Range: 3%

Controlled / stored by importers, listed online



How Demand is Created

It's all intertwined

- Systembolaget retail presence
- By-the-glass in restaurants
- Journalists & educators



How to Enter the Market

First Steps

- Optional: test the market via freegrapesociety.com
- Find an importer
- Wine board cooperation helps
- Trade fairs matter



Key Take- Aways

- Multiple access points
- The market is opening up
- Regulated, but transparent market
- Impact with modest budgets



THANKS FOR LISTENING!

Any Questions?

