



The Food and Beverage Market Entry Handbook: Norway

A Practical Guide to the Market in Norway
for European Agri-food Products



*Promotion of
agricultural
products*



The Food and Beverage Market Entry Handbook

Norway

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Note: the term EU in this handbook refers to the EU-27 excluding the UK, unless otherwise specified. For product trade stats, data is presented in order of exporter size for reasons of readability.

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1 The Food and Beverage Market Entry Handbook: Norway

This Handbook is intended to act as a reference for those agri-food producers planning for, or in the process of entering, the Norwegian market. This Handbook provides **step-by-step guides** on entering the agri-food market in Norway including relevant information such as **analysis of the Norwegian market** for different product categories, **market access** and **market entry procedures**, **IP protection**, **referrals to professional buyers** and a signposting and referral system providing useful contacts and ways to penetrate the Norwegian market.

How to use this handbook

Depending on your stage of market entry, company profile, and product range, different sections within this handbook will be helpful to a different extent for your business strategies.

For those wishing to learn more about the Norwegian food and beverage market in general, section 2 provides a general country overview; section 3 provides an overview of the agri-food market; and section 4 an overview on market entry. These latter two sections contain information on: the food and beverage market, market access procedures, customs procedures, SPS and labelling requirements, intellectual property protection, including the status of geographical indications. The information contained within these sections is of a general nature and so may not be relevant for those in the more advanced stages of market entry.

If you want to find out more information relevant for your product, then check out the **Market Snapshots for Selected Products** (section 5). This content illustrates the market situation, market access procedures, SPS requirements etc. specific for this product or product category. This information will provide more industry specific information to consider as part of any market entry or market expansion strategies.

If you already have decided that the Norwegian market is where you want to be, but you need some support, then the **Support Services Directory** can point you in the right direction. Contact information for a service provider, business facilitation support organisation, or from a business contact, could help put you in touch with the right parties who can help you to build your brand in the Norwegian market.

2 Country introduction and overview



Capital:	Oslo
Population:	5.4 million (Europe's 25 th most populous country)
Area:	385000 km ² (the world's 65 th largest country)
Political structure:	Parliamentary constitutional monarchy
Major languages:	Norwegian is the official and most widely spoken language, Sami also an official language.
Major religions:	Church of Norway (68%), Catholicism (3%), Islam (3%), Atheist (18%)
Life expectancy:	83.2 years (Male 81.7 years, Female 84.7 years)
Currency:	Norwegian Krone (NOK); 1 EUR = 10.1 NOK (2022 average)
GDP growth (real):	2.8% (2021)
Exports:	41.6% of GDP (2021)
Imports:	29.1% of GDP (2021)
Main exports*:	Mineral fuels including oils (66.8%), fish (8.4%), aluminium (3.3%), machinery including computers (2.8%)
Main imports*:	Vehicles (12.9%), machinery including computers (12.6%), electrical machinery (9.3%), Mineral fuels including oil (5.5%)
Unemployment rate:	4.4% (2022 average)
Labour force:	72.90% (2022 average)
Main industries:	Agriculture: 1.5% of GDP Industry: 35.5% of GDP Services: 52.1% of GDP
Average household income (2020):	EUR 43000
Household expenditure on food and beverages (2022):	EUR 7000

Sources: Euromonitor International: Economies and Consumers, 2022; IMF; UN, World Bank; WHO, OECD. * Goods only listed

2.1 Country overview: Norway at a glance

2.1.1 Past economic and political trends

- *Norway has played a key cultural and political role in European history stretching from the country's Viking era to the two world wars.*
- *Present-day Norway spent most of its history in a union with either Denmark or Sweden before peacefully separating from Sweden in 1905.*
- *Post-world war two, Norway became a founding member of the NATO alliance and became a founding member of the European Free Trade Association (EFTA).*
- *The discovery of oil and gas in the North Sea in 1970 has accelerated the rapid economic development of Norway with the country's industrial and services sector expanding rapidly in recent years.*

Located in the subregion of Scandinavia, Norway is a large country by land area and one that has played a large role in the cultural development of Europe. The Viking era of Europe was characterised by the increased presence of invaders and settlers of Scandinavian (i.e. Norwegian) descent in Europe. The Viking era continues to influence European countries to this day either via the influence of the Norsk language within German and English or the many cities being heavily influenced by Viking settlers in Europe such as Dublin, Riga and York. Post the Viking era, Norway found itself a member of the Kalmar union with Sweden and Denmark although the country's influence waned as the black death resulted in the death of roughly half the Norwegian population. Norway consequently found itself in a political union with either Denmark or Sweden for several centuries before becoming independent in 1905. Norway remained a largely agrarian economy post-independence and found itself occupied during world war two.

Post world war two the country regained independence and played a key role in the foundation of several large multinational organisations such as NATO and EFTA. The largest impact on the local economy in recent decades has been the large-scale drilling and extraction of oil from the North Sea which was discovered in the 1970s. The discovery of oil within Norway's exclusive economic zone catapulted the country's economy into one of the richest in the world. Norway has utilised the revenue from its oil sector to invest in several key infrastructure projects across the country and has seen a rapid industrialisation and expansion of its services sector in recent decades. Norwegians now have one of the highest income per capita rates in the world and the country consistently ranks amongst the highest within key human development indexes such as life expectancy, education and equality.¹

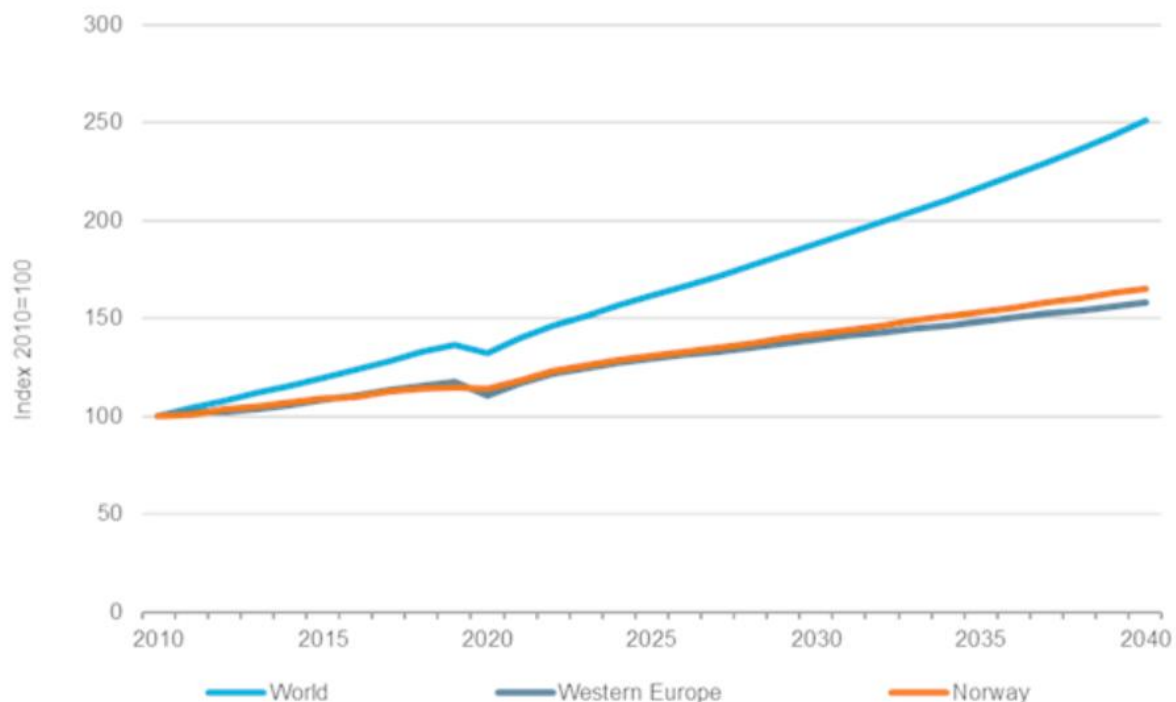
¹ Norway Timeline : A journey through Norwegian history, Life in Norway, available at <https://www.lifeinnorway.net/norway-timeline/>

2.1.2 Current economic situation and mid-term outlook

- *Norway has a well-developed economy backed by state-owned strategic assets, a strong welfare system and a large sovereign welfare fund.*
- *The government of Norway has enacted numerous programs aimed at pivoting the country away from its dependence on the extraction of fossil fuels.*
- *Norwegian economy was impacted by the outbreak of COVID-19 as tourism to the country was limited and the service sector operated under restriction, however, the economy has rebounded since.*
- *Looking ahead, Norway will continue to play a key role in the exportation of fossil fuels to the rest of Europe coupled with acting as a key leader in the advocacy of human rights and development across the world.*

The discovery of oil in the North Sea allowed the country to fund and expand its welfare system offering Norwegians some of the largest amounts of state aid in the world although the country is also a high-tax economy. As North Sea oil and gas continue to dominate total exports from Norway, the country has enacted several programs aimed at moving away from oil dependency such as funding start-up hubs across the country, enacting measures to encourage outward investment and the development of the country's internal public infrastructure system.

Figure 2-1: Real GDP growth and per capita GDP in Norway: 2010-2040 (Projected)



Source: Euromonitor International: Economies and Consumers, 2022

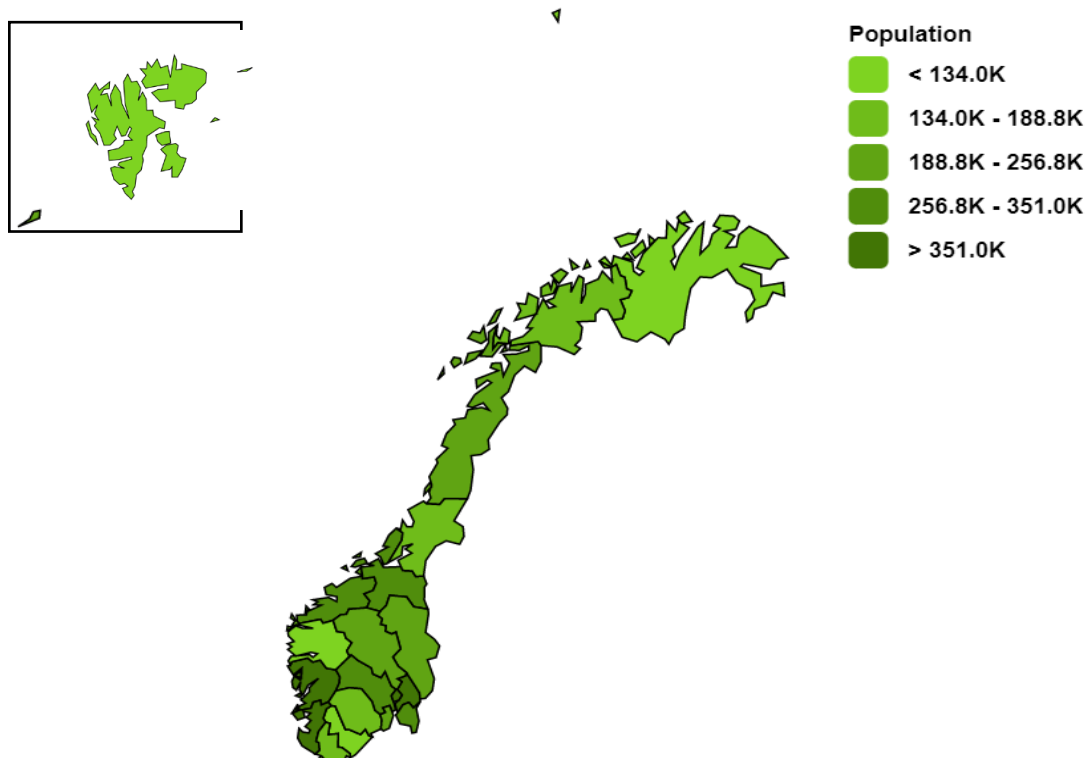
The Norwegian economy has remained robust within the 21st century despite global economic downturns taking place during the same period. Although the outbreak of COVID-19 negatively

impacted the economy, as tourism to the country came to a halt coupled with the service sector operating under restrictions, the economy has since rebounded. Looking ahead, Norway will likely remain a very wealthy country and continue to be a key global advocate for issues relating to human rights, climate action and equality. ²

2.1.3 Population trends

- *The Norwegian population stands at roughly 5.4 million which ranks the country as Europe's 25th most populous country and the world's 122nd most populous country.*
- *Norway currently has a fertility rate of 1.48 births per woman, far below the generally accepted replacement rate of 2.1 births per woman.*
- *The population of Norway is heavily concentrated within the south and coast of the country, with 40% of the population living within 200km of Oslo. Bergen, Trondheim and Stavanger are the only other major cities within Norway.*
- *Roughly 17% of the population is made up of non-Norwegian ethnic groups with Poles, Lithuanians and Swedes being the biggest ethnic groups residing in Norway.*

Figure 2-2: Regions of Norway by population



Source: Agra CEAS based on various

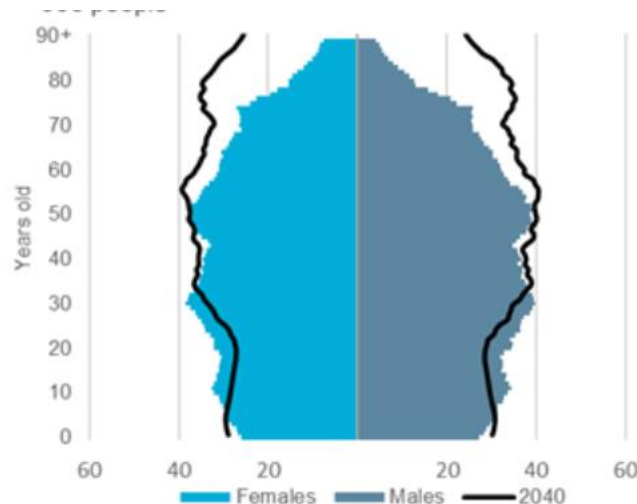
Norway is a large country which stretches from the more continental climate in the south to the boreal arctic climate found in the north. Climate and topography play a key role in the population

² Norway economic snapshot, OECD, available at <https://www.oecd.org/economy/norway-economic-snapshot/>

distribution in Norway with the majority of the population found within the southern regions of the country concentrated around the city of Oslo; in fact, more people live within Oslo than all of the northern regions of Norway. The southern regions are less mountainous and the climate although cold by European standards in the winter remains sufficient for supporting larger settlements. The mountainous topography of the country throughout the centre up to the far north has limited the ability for large-scale human settlements to develop; as a result, many of the larger settlements found in central and northern Norway are spread out and largely isolated from each other such as the cities of Trondheim, Hammerfest and Tromsø.

The total fertility rate of Norway stands at 1.48 births per woman which is low but reflective of the wider developed economy of Norway. Despite a low birth rate, immigration and a longer life expectancy are sustaining population growth in Norway, with the population forecasted to peak at around 6 million by 2060 according to current projections. Immigration to Norway has grown in recent decades spurred by the economic growth of the country and demand for labour. The biggest immigrant groups in Norway currently are the Polish (100 000), Lithuanians (40 000) and Swedes (37 000).³

Figure 2-3: Age pyramid in 2019 and 2040 in Norway



Source: Euromonitor International from national statistics/UN, 2022

Note: Data for 2040 is forecast

³ Population, Norwegian statistics office, available at <https://www.ssb.no/en/befolkning/folketall/statistikk/befolkning>

2.2 Geography and key markets

Norway is ranking as Europe's 6th largest country by land area. Norway is located in the north of Europe in a region known more commonly as Scandinavia. The country borders three other countries those being mainly Sweden followed by a smaller border with Finland and Russia. Norwegian territory also includes the island of Svalbard located in the arctic circle with a population of just under 3 000, as well as the uninhabited island of Jan Mayen and the dependent territories of Peter the 1st island and Bouvet island which are located in the south Atlantic.

The country's capital Oslo is located in the southeast and is by far the largest settlement in Norway having the highest population, largest airport and busiest port of Norway. The second largest city, Bergen, is located on the western Atlantic coast, while Trondheim is the third largest city and is located in the north of the country. Roughly 80% of the population is living within 10km of the coast⁴; this is due to the mountainous inner terrain of the country which makes large-scale human settlement difficult, combined with historically relying on shipping as a means of food and human transport which encouraged settling within the vicinity of the coast.

2.2.1 Overview of urban markets

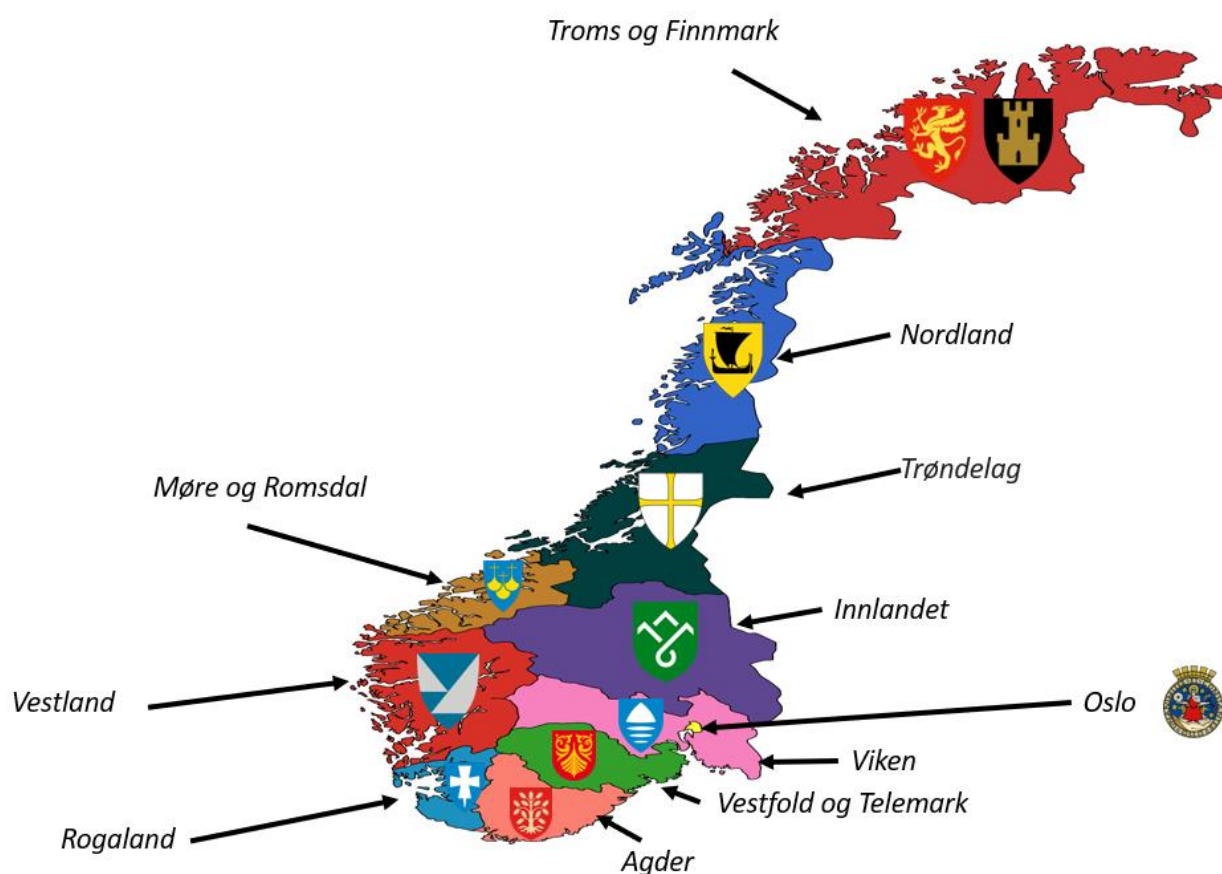
Norway is **currently** (end of 2022) divided into 11 counties. However, a decision by the parliament of Norway (*Storting*) will see the counties of Vestfold og Telemark, Viken, Troms og Finnmark being dissolved into their previous merged counties; this is due to take place around the beginning of 2024 and will see the number of counties in Norway rising to 14 in total. County reform has been ongoing for several recent years in Norway, with there being 19 counties in 2017 before a decision by the government reduced the total number of counties to the current 11. The islands of Jan Mayen and Svalbard fall outside of the country system and are instead ruled directly by the state.

Norway is also often divided into five regions with cultural similarities and at times language (in the case of the Sami language). These regions are known as Northern Norway, Trøndelag, Western Norway, Southern Norway and Eastern Norway.⁵

⁴ National and regional story (Norway) why should be care? EEA, Available at <https://www.eea.europa.eu/soer/2010/countries/no/national-and-regional-story-norway>

⁵ Majority wants to reverse the mergers, News in English .no, Available at <https://www.newsinenglish.no/2022/02/01/majority-wants-to-reverse-mergers/>

Figure 2-4: Counties of Norway



Source: Agra CEAS based on various

Table 2-1: Counties and Regions of Norway

Region	County	Capital/Administrative centre
Northern Norway	Nordland	Bodø
	Troms og Finnmark	Tromsø
Trøndelag	Trøndelag	Steinkjer
Western Norway	More and Romsdale	Moulde
	Vestland	Bergen
	Rogaland	Stavanger
Southern Norway	Agder	Arendal
Eastern Norway	Oslo	Oslo
	Innlandet	Hammerfell
	Viken	Drammen
	Vestfold og Telemark	Tonsberg

Source: Agra CEAS based on various

The government of Norway is structured via three levels of administration.

- The first level is the Kingdom which covers all of metropolitan Norway as well as the islands of Svalbard and Jan Mayen.
- The second level is the country level with 11 counties for the moment making up the country of Norway, these countries also act as constituencies within the parliament.
- The third level is at the municipality (commune) level of which there are currently 420 spread out across Norway.

Norway used to have much more counties and municipalities however the expansion of transport and communication infrastructure has lessened the need to have so many different administrations resulting in the consolidation of counties and municipalities in recent years.⁶

Figure 2-5: Overview of the political structure of Norway

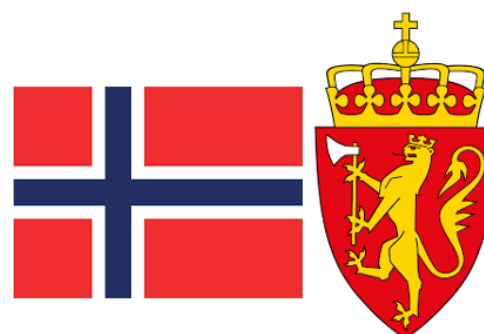
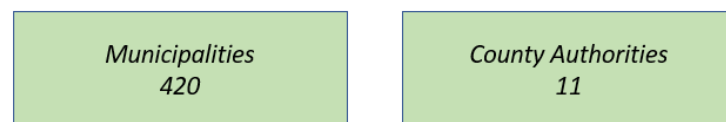
National Government



Regional Government



Local Government



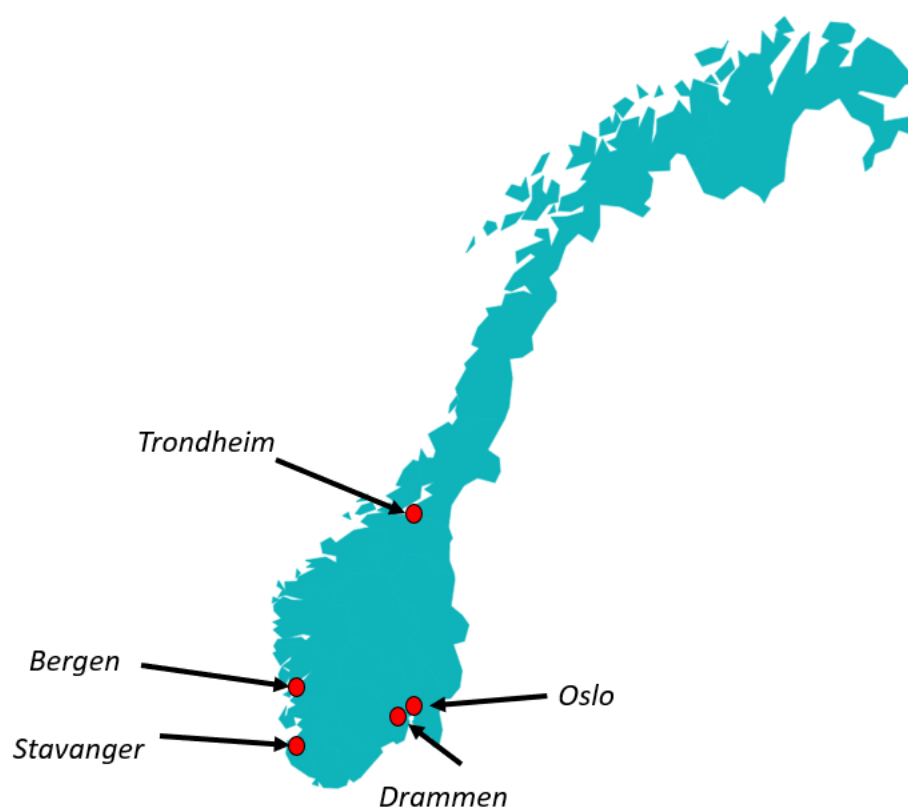
Source: Agra CEAS based on various

2.2.2 Snapshots of important markets

Despite being a quite large country by land area, Norway's population is heavily concentrated within settlements located along its coast with 80% of the population living within 10km of the coast. Oslo is the largest city by far with 20% of the Norwegian population living within the vicinity of Oslo and 40% within a 200km radius, which presents a desirable market for EU food and beverages within Norway. Indeed, Oslo is the premier destination for EU food and beverages due to the city having a wider exposure to international business, tourism and logistical links to the EU when comparing other Norwegian cities. Bergen, the second largest city located on the west coast of the country, represents another important market for EU food and beverages as the city receives a lot of tourism and business relations from the EU. Stavanger, Trondheim and Drammen are the next significant cities of relevance for EU food and beverages in terms of market size and activity.

⁶ The Government, Government of Norway, available at <https://www.regjeringen.no/en/the-government/id443314/>

Figure 2-6: Location of focus markets



Source: Agra CEAS

Oslo

**Key facts:****Total GDP (2021, estimated):***EUR 34 billion***Population:***1.1 m (capital region)*

Oslo is the capital and by far the largest city in Norway with 40% of the Norwegian population living within 200km of the city. The warmer climate (when compared to the rest of Norway) coupled with the city's favourable topography and relative proximity to other European cities has facilitated the rapid development of Oslo as the largest city in Norway. Oslo is home to Norway's largest governmental and financial organisations and is the economic hub of the entire country. Oslo is well renowned for its high quality of life and robust economy with the city ranking as one of the world's most business-friendly cities consistently in recent years.

The GDP of Oslo accounted for roughly 20% of the wider Norwegian GDP with the city being well known for its maritime, shipbroker and insurance sectors. The largest airport, train terminal and port in Norway are all located in Oslo, acting as the key gateway into Norway for visitors arriving in the country. As the economic and cultural hub of Norway, the city attracts a large number of immigrants and tourists from the EU with Poles, Swedes and Lithuanians being amongst the larger immigrant groups living in Oslo. Overall, around a quarter of the population of Oslo are from an immigrant background.

Key areas of interest for EU food and beverage producers seeking to showcase their products in Oslo include the markets of Mathallen, Rustal and Vippa, with several food events occurring throughout the year in the city as shown in section 8.4. It is important to note that Oslo is well known for its high consumer prices, being ranked as one of the most expensive cities in the world.

Sources: Oslo-Experience the vibrant capital of Norway, Visit Norway, available at <https://www.visitnorway.com/places-to-go/eastern-norway/oslo/> Oslo city review, worldinfotravel.com, available at <https://worldinfotravel.com/country-norway-city-oslo-summary/> Oslo Travel, lonely planet, available at <https://www.lonelyplanet.com/norway/oslo>

Bergen



Key facts:

Total GDP (2021, estimated):

EUR 9.5 billion

Population:

285 000

Located on the west coast of Norway facing the Atlantic Ocean, Bergen is the second largest city in Norway and is an internationally recognised city with regards to aquaculture, shipping and the offshore oil sector. Some of the world's largest aquaculture companies are located in Bergen and the city is further home to large multinational shipping companies. Large Norwegian maritime companies are also located in Bergen and form a key component of the wider Norwegian economy.

The city of Bergen attracts thousands of individuals annually from both the city's offshore oil and gas sector as well as tourism. Bergen is the main transportation hub for employees working in the large Norwegian North Sea oil sector and many employees live in Bergen when not living on offshore oil and gas platforms. The natural beauty of Bergen coupled with the city's position as a gateway to northern Norway attracts a large number of tourists with tourism to the city rising rapidly in recent years, acting as another key factor in making the city attractive for EU food and beverage producers.

Bergen is home to a large seaport which acts as one of the busiest terminals for cruise ships in Europe. Further, the city is one of the smallest in Europe to have a fully developed tram and trolleybus system which makes the city quite easy to travel around. There are some smaller food markets in Bergen although the majority of them tend to focus on the sale of fish foods. There are a small number of Poles, Germans and Swedes living in Bergen which act as likely consumer groups for imported EU food and beverage products.

Sources: Bergen- The Capital of Fjord Norway, available at <https://www.visitnorway.com/places-to-go/fjord-norway/bergen/>, Bergen Travel, Lonely Planet, available at <https://www.lonelyplanet.com/norway/bergen-and-the-western-fjords/bergen>, EuroCities, available at <https://eurocities.eu/cities/bergen/>

Trondheim**Key facts:****Total GDP (2021, estimated):***EUR 6.1 billion (estimated)***Population:***210 000*

Trondheim is the third largest city in Norway by population and a large transit hub. The city is located in the country of Trondelag and is the largest settlement in central Norway and one of the largest cities located in far northern Europe. Trondheim acts as a key transit hub for people and goods travelling between the more populous south of the country and the sparsely populated north of the country.

Trondheim is situated along the Trondheim Fjord; this helps to grant the city a large deep-water port which helped to facilitate the economic development of the city and to attract individuals to the city via the movement of people through shipping. Due to its location in the far north, Trondheim is prone to very short days during the wintertime with an average sunlight of just around 5 hours, although the sun never sets during the summer months creating a 24-hour sunlight (midnight sun) cycle which attracts visitors wishing to experience the phenomenon. Visitors also come to Trondheim to witness the natural beauty of the area or in transit to other northern Norwegian settlements such as Hammerfest.

Concerning food and beverages, the city is home to several restaurants themed from EU Member States, such as French and Italian restaurants, as the city has grown to be quite international in recent years in line with improved communication and transportation infrastructure in the municipality and wider Norway. Fish and maritime foods continue to be very popular in the city, a reflection of the maritime culture of the wider region. However, the growing immigrant population in Trondheim is further driving demand for new and more globally recognised foods in the city.

Sources: Exploring Trondheim, Norway where the sun never sets, Star Tribune, available at <https://www.startribune.com/exploring-trondheim-norway-with-a-teenager/512183562/>, Explore Trondheim, European Region of gastronomy 2022, available at <https://norwayfoodregion.com/>, Trondheim, Lonely Planet, available at <https://www.lonelyplanet.com/norway/northern-norway/trondheim>

Stavanger



Key facts:

Total GDP (2021, estimated):

EUR 8.9 billion

Population:

144 000 (city)

Stavanger is the fourth most populous city of Norway and is the administrative capital of the county of Rogaland. Stavanger is located in southwestern Norway and is regarded as one of the country's milder climate cities. Stavanger is a key city within the Norwegian food and beverage market as it hosts some of the larger food and beverage festivals found in Norway such as the annual happy food festival. Stavanger has a reputation within Norway as a city of culinary delights.

Outside of the city's food and beverage sector, the city is also often referred to as the oil capital of Norway with some of the largest oil and gas companies in the country such as the state-owned Equinor (formally known as Statoil) having its headquarters located in the city. The city also hosts some of the largest conferences and trade fairs seen in the global oil and gas sector.

Tourism is also a key sector in the city, being home to one of the busiest and fastest-growing cruise shipping ports in Europe. The city is also commonly a stopping point for visitors travelling along the Norwegian coastline. Immigration to the city has grown rapidly in recent years in line with the growth of the city's oil and gas sector; today, roughly 20% of the population is from an immigrant background with immigrants from EU Member States such as Denmark, Poland and Romania making up some of the larger immigrant groups in Stavanger.

Sources: Stavanger Region, Visit Norway, available at <https://www.visitnorway.com/places-to-go/fjord-norway/the-stavanger-region/> Stavanger, Euro Cities, available at <https://eurocities.eu/cities/stavanger/>

Drammen



Key facts:

Total GDP (2021, estimated):

EUR 3.3 billion

Population:

100 000 (city)

Drammen is located in southern Norway within 44km of the capital Oslo, which makes it a key commuter hub for workers commuting to Oslo. The city itself is home to roughly 100 000 people and is one of the larger cities in Norway. Drammen's population has grown significantly in recent years as the price of property in nearby Oslo has pushed commuters to live further away in cities such as Drammen.

The city is home to a large beer brewery and is known throughout Norway for its production of beer products, as well as for the production of timber and paper materials. The city also has a large port which facilitates some of the cargo traffic away from the port of Oslo. The city's importance for EU food and beverages comes from the number of immigrants who have arrived in recent years to either seek employment in Drammen or to live in Drammen and commute to Oslo. The larger EU immigrant groups residing in Drammen include Poles (the largest overall immigrant group in the city), Lithuanians and Swedes.

The city hosts several small food and beverages events across the year, such as a street food market and a craft beer festival. Further information regarding food and beverage events which take place in Drammen can be found in section 8.4.

Sources: An introduction to Drammen, Life in Norway, available at <https://www.lifeinnorway.net/drammen-norway/>,

2.3 Domestic agricultural production and regions

Agricultural production in Norway is quite small by European standards, with the country being characterised by small-medium scale family-owned farms which have an average hectare size of around 20 ha. Topography plays a large role in explaining why the Norwegian agricultural sector is of a smaller size, with the country being largely made up of many inland hills and mountainous terrains which limits the ability to develop large-scale farm units coupled with a colder climate which limits the country's ability to produce certain crops requiring plentiful sunlight. Only around 3% of Norway's total area is arable land, and 30% of this can be used for grain production and vegetables; the rest of the area can only be largely used for grass production.

Despite these limitations, it should be noted that the Norwegian government has a target of 50 per cent self-sufficiency in terms of agricultural products. Policies focused on agricultural production have always focused on supporting farming all over Norway, independent of any difficulties stemming from geographical or environmental conditions. The subsidising of farmers is a cross-party policy, though the current government is particularly focused on closing the income gap between farmers and general workers; as affirmed by the Norwegian agricultural settlement of May 2022 which allocated NOK 10.9 bn to agricultural support for 2022 and 2023 (the highest figure in history).

A further breakdown of agricultural development across Norway by region is provided below.

Northern Norway

The growing season in Northern Norway is severely limited as the region descends into complete darkness for half the year and experiences year-round colder temperatures. Thus, the region is best known for the production of grass-based livestock production and fishery products. Climate change is, however, accelerating the rise in average temperatures in Northern Norway and it is believed this may ultimately lead to the region growing in importance for agricultural production in the future.

Trøndelag

Trøndelag incorporates most of central Norway and is one of the larger regions of the country. The region is one of the most fertile regions of Norway and is known for its production of meat and dairy products. The region is also more categorised by larger farms when compared to the overall trend in Norway for farms to be small-medium sized.

Eastern Norway

The region of eastern Norway is the economic heart of the country incorporating large cities such as the capital Oslo and the city of Drammen. Concerning agricultural production, milk, bovine meat and sheep meat are produced to a large scale in this region as are potatoes, barley, oats and wheat.

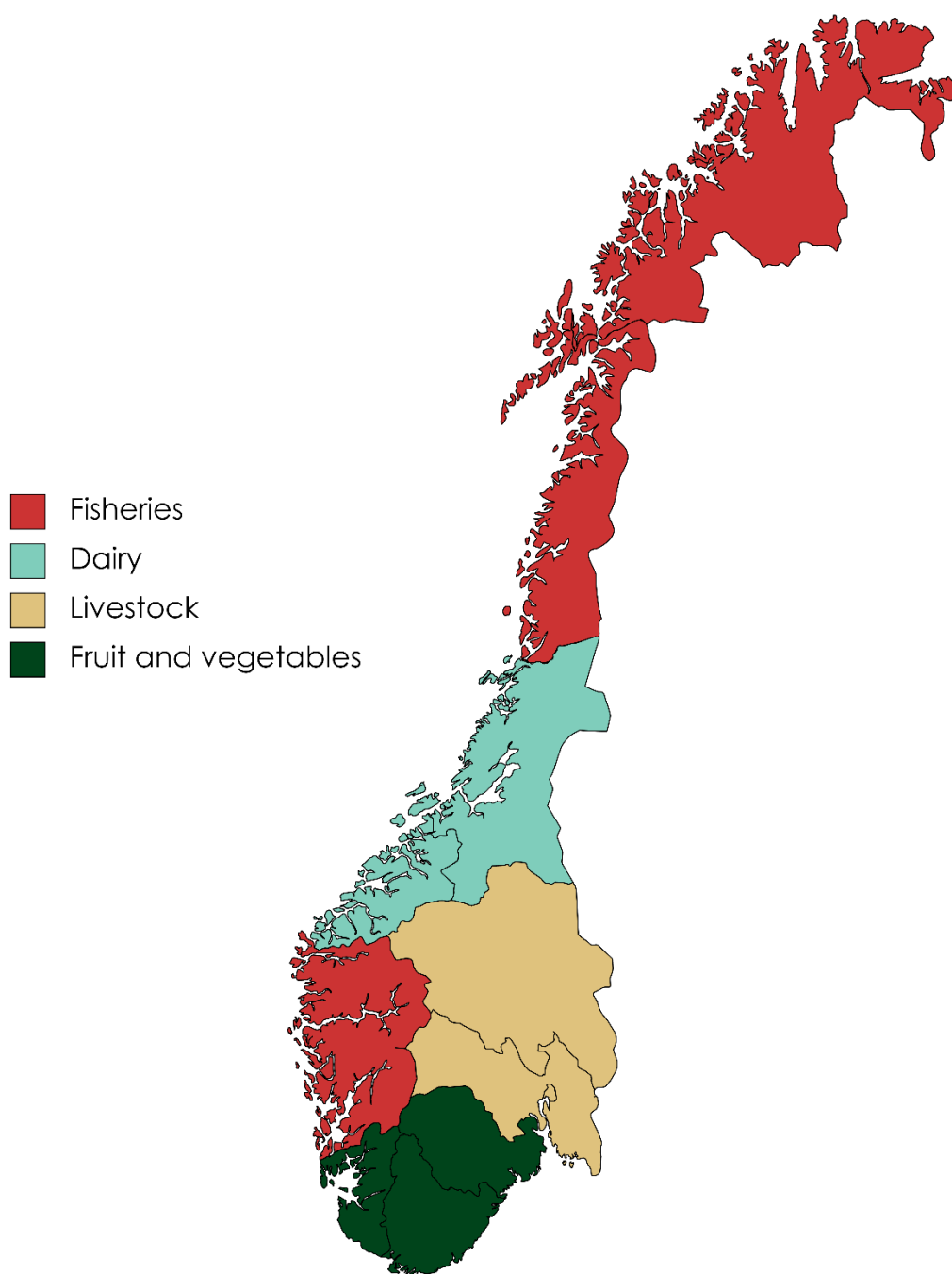
Western Norway

Western Norway is categorised by its many fjords and inner hills which complement the production of meat, the dominant agricultural product produced in the region. Some crops such as oats and wheat are also produced in the region, as is a small amount of milk. The municipality of Rogaland and specifically within the vicinity of the town of Nærbø is often referred to as the breadbasket of Norway as the town is located in the south of this region which is mostly flat and favourable for agricultural development. Almost half the land within the vicinity of Nærbø is used for agricultural purposes.

Southern Norway

Southern Norway is best categorised by its milder climate encountering many rainy days but rarely major extremes in temperature. This helps to facilitate the commercial production of fruit and vegetables and indeed most of the fruit and vegetables produced in Norway are produced in the Southern region of the country.

Figure 2-7 Agricultural products most commonly associated with the counties of Norway



Source: Agra CEAS based on various sources

3 Introduction to the food and beverage market and consumers

3.1 Overview of the food and beverage market and demand for imported products

3.1.1 F&B market summary

As noted in section 2.3, Norway is not a major producer of agricultural products due to a combination of the country's climate, topography, small-scale farming size and the costs of production. However, despite the small size of the domestic agricultural sector by European standards, the small and concentrated population of Norway allows for domestic production to satisfy local demand for certain products - for example:

- Norway produces roughly 80-90% of the domestic demand for beef and sheep meat.
- Norway is largely self-sufficient in the production of milk.
- Approximately 60% of grain and potato production is covered by domestic production.⁷

Despite this, the country is largely reliant on imports to cover demand for fruit and vegetables, certain dairy products such as butter (exemplified by the 2011 nationwide butter crisis) as well as alcoholic beverages such as wine. Overall, Norway is a net importer of food and beverages and a combination of a slow-growing population coupled with an overall fall in total farms across the country in recent years has continued to push Norway to importing food and beverages despite efforts from the government in recent years to move away from relying on large scale food and beverage imports.

3.1.2 International trade in F&B

As mentioned, Norway is a net importer of food and beverage products. On the export side, fishery products such as salmon, certain cheeses and processed food products are the main agricultural products exported by Norway, although it is important to note that most agricultural production in Norway is geared towards catering to the domestic market rather than external markets.

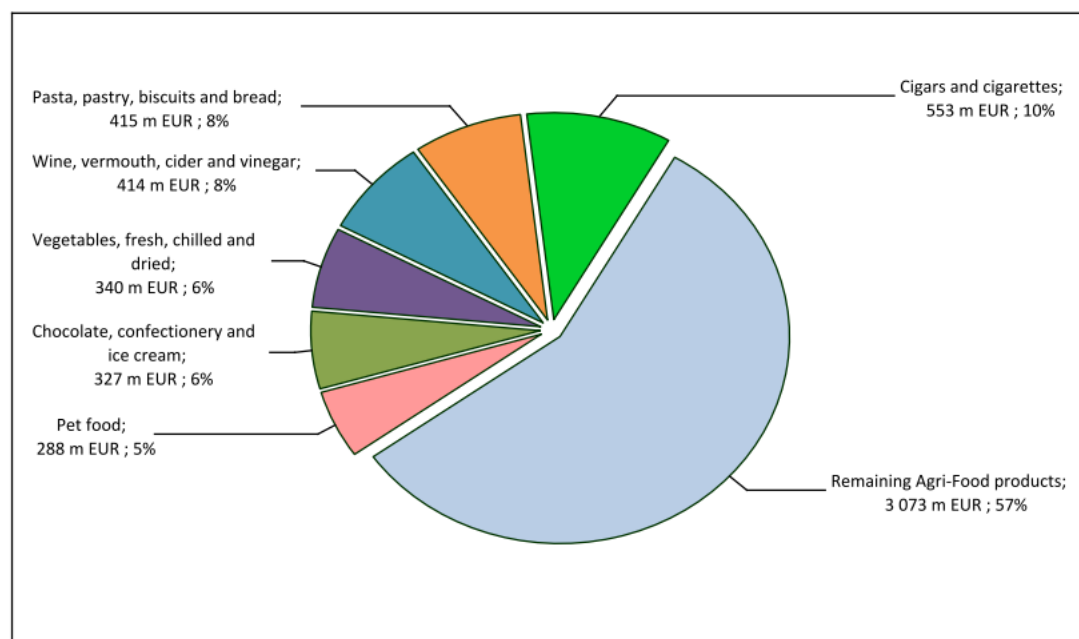
⁷ Family Farming, the key to food production in Norway, TINE, Available at <https://www.tine.no/english/about-tine/family-farming-the-key-to-food-production-in-norway>

Figure 3-1: Structure of EU-27 (i.e., exc. the UK) agri-food trade with Norway, 2011 to 2021



Source: European Commission: agri-food trade statistical factsheet, European Union – Norway. Based on Eurostat-COMEXT data.

In 2021, the EU exported to Norway a total of around EUR 5.4 billion worth of agri-food and beverage products which ranks Norway as the EU's 7th largest destination market for food and beverages (although Norway is now likely 6th as exports to Russia has come to a halt). This represents 2.8% of all EU agri-food and beverage exports. Norway was the 38th largest exporter of food and beverages to the EU a reflection of the country's small agricultural output capacity.

Figure 3-2: Top EU-27 agri-food exports to Norway in 2021

Source: European Commission: agri-food trade statistical factsheet, European Union – Norway. Based on Eurostat-COMEXT data

3.1.3 The market for imported F&B

Norwegian imports from the EU reflect shortfalls in domestic production coupled with products which enjoy a good reputation within the Norwegian consumer market. Some of the larger exports of agri-food and beverage products to Norway in 2021 include:

Pasta and baked good products

Baked goods products such as pastries, biscuits and importantly bread are among the larger exported food and beverages products from the EU to Norway. Collectively alongside pasta, exports of these products came to a value of EUR 415 million in 2021 representing 8% of total EU food and beverage exports to the country.

Alcoholic beverages

Alcoholic beverages, such as spirits and particularly wine, were exported to a large degree from the EU to Norway in 2021 with total exports coming to a value of EUR 514 million when combining the total export value of wine, spirits and beer products which collectively represents around 10% of total EU exports of food and beverages to Norway.

Fruit and vegetables

As mentioned in section 2.3, Norway has a large shortfall in domestic production of fruit and vegetables. The EU is one of the larger exporters of fruit and vegetables to the country with total fruit exports coming to a value of EUR 270 million in 2021 while total vegetable exports came to a value of EUR 340 million. Vegetables accounted for 6.3% of total EU agri-food and beverage exports to the country while fruits represented 5%.

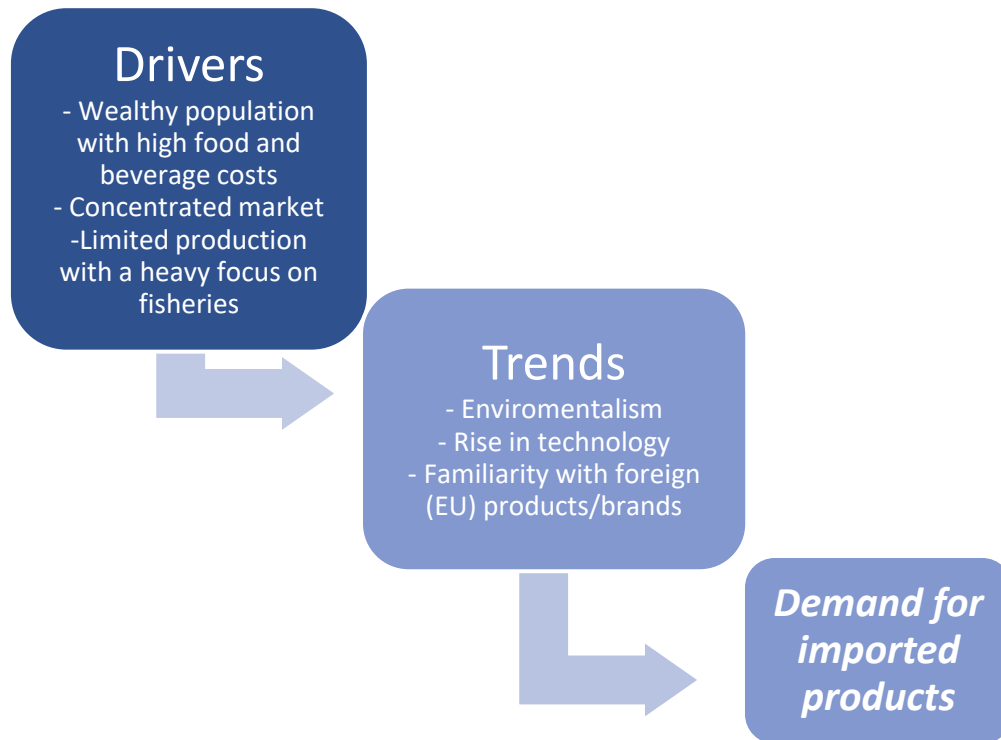
3.2 Growth Drivers and Trends

The key factors affecting the food and beverage market in Norway are:

- **Wealthy population with high food and beverage costs:** Norwegians have one of the highest per capita incomes in the world which helps the population to afford the very expensive consumer goods sold in the country. Food and beverage products in Norway are generally very expensive, on average costing almost double the EU average. A combination of limited farmland, a heavily subsidised agricultural sector and the reliance on importing certain food and beverages from abroad help to explain the higher costs of food and beverages in the Norwegian market.
- **Concentrated market:** The consumer base of Norway is heavily concentrated within specific corridors of the country for example within the region of Oslo and along the coast of the country. Roughly 82% of the population lives within an urban centre with the market further being concentrated between three major retail outlets (Rema, COOP and Norges Gruppen) which dominate the retail market of the country and play an influential role in defining consumer trends in the market.
- **Limited production with a heavy focus on fisheries:** As discussed in section 2.3, Norway has a limited amount of arable land which is largely focused within the south of the country or areas within central Norway. Fishery products have been traditionally the main dish of the country although there has been a small move away from mass fishery consumption in recent years in favour of products such as beef and poultry. Still, fishery products such as salmon remain commonly consumed in Norway and often complement other foods such as cheese, bread and other fresh meat products.

In terms of current trends, the following stand out:

- **Rise in environmentalism:** The consumer base of Norway has grown steadily more environmentally conscious in recent years in line with a trend seen in many other western European countries. Norwegian consumers increasingly seek out products which are organically produced or have a limited impact on the environment. Labels concerning fair trade, organic and low artificial ingredients are an increasingly important buying criterion for many Norwegian consumers across multiple food and beverage products.
- **Rise in technology:** The Norwegian consumer base is one of the most tech-savvy consumer bases in the world with an internet penetration rate of 97% which is one of the highest rates reported globally. Norwegian consumers increasingly have utilised E-commerce platforms for their shopping habits with most major retailers having this as an option. Food delivery platforms such as Wolt and Foodora are also commonly used by consumers to order groceries and food from food service outlets. This trend was accelerated by the outbreak of COVID-19.
- **Familiarity with foreign products:** As Norway has a limited capacity to mass produce various food and beverage products due to the country's climate and topography, it is one of the larger food and beverage importers in Europe. This results in consumers in the country being generally well aware of foreign (largely EU) brands such as chocolate brands, fruit and vegetable brands and alcoholic beverages. Due to improvements in the country's transportation and communication infrastructure in recent years, there is far less isolation among cities located in the north of Norway which is driving demand for new products from abroad. Immigration and tourism to Norway has also grown significantly in recent years, which in turn further drives demand for imported food and beverage products as many immigrants and tourists arriving in Norway are citizens from EU Member States.

Figure 3-3: Growth drivers and trends – the Norwegian food and beverage market

Source: Agra CEAS based on European Commission agri-food factsheet; Euromonitor International, and various (see footnotes).

3.3 Consumer profiles and preferences

3.3.1 Consumer profiles

Certain aspects of the Norwegian population that were touched upon in sections 2.1 and 2.2 are worth bearing in mind when considering Norwegian consumers. Most notably:

- **Immigration.** In recent years the expanding Norwegian economy and service sector has attracted a large number of immigrants from across the world. At present, the largest immigrant groups in Norway are from EU Member States, notably Poland, Lithuania and Sweden. The total population of immigrants in Norway stands at roughly 820 000 which represents almost 20% of the population. The country's immigrant population is concentrated within larger urban centres such as Oslo, Bergen and Stavanger. There is also a relatively smaller presence in Norway of Islamic adherents (accounting for 3% of the total population) likely to abstain from certain products such as alcoholic beverages and pork, and Hindu and Buddhist adherents who will also have reservations surrounding the consumption of certain food and beverages.
- **Urbanised and concentrated population:** Roughly 82% of the Norwegian population lives within an urban centre with this figure continuing to rise. Most major settlements in Norway are located alongside or within the vicinity of the coast which creates clear consumer corridors for exporters to target. A large segment of the population is focused

within the south, central and western regions of Norway with the northern region being very sparsely populated.

- **Increasing Age.** Like many western European countries, the Norwegian population is ageing which is creating additional pressures as the country adapts to support an ever-expanding elderly population. Immigration is helping to alleviate the more apparent shortfalls in the ageing labour market which is the key driver of population growth in the country. As the population continues to age the consumer profile of the average Norwegian changes to adapt to an older population.

Against the considerations set out above, notable overarching consumer types in Norway are set out below. It is important to note that, while these overarching types have relevance across the country to some extent, the various aforementioned nuances must be taken into account given that in such a diverse country, the relevance of universal consumer types is limited:

- **The traditionalist consumer:** Despite the country heavily relying on the importation of various food and beverage products, Norwegians remain very strongly attached to food and beverages of Norwegian origin. It is difficult to travel to Norway without being exposed to certain traditional Norwegian food and beverage products and anyone visiting a Norwegian household is almost certain to be offered products such as *brunost* (a brown cheese unique to Norway and a source of pride for many consumers), a variation of a fishery product with many Norwegians associating their domestic fishery products as being amongst the best quality in the world and a beverage such as a domestic variant of Akvavit which is commonly consumed around major celebrations in the country. While many Norwegians have embraced the fact that the country is reliant on the importation of certain food and beverage products, this only further cements pride in food and beverage products which are produced domestically.
- **The ambitious consumer.** Norwegian consumers are amongst the most tech-savvy and entrepreneurial consumers in Europe with internet penetration rates and start-up business creation rates compounding the consumer segment of ambitious consumers. Ambitious consumers are likely to be well aware of foreign products and will take advantage of the strong strength of the local currency the Norwegian Krone to purchase food and beverages in Sweden or even in Denmark, with ferries between both countries being well-known for the transportation of consumers seeking cheaper food and beverage products, particularly alcoholic beverages. Ambitious consumers are more likely to take advantage of the growing E-commerce space in Norway and stand out as the more premium users of this service.
- **Concerned consumers:** The issue of climate change has impacted many Norwegians, with the country being known globally as an advocate of climate action and environmentalism. Norwegians are well known for their high rates of recycling and the presence of a varied and spectacular environment across the country has made consumers especially concerned about the impact their consumption patterns have on the environment. Due to this, across many food and beverage products which are further presented in detail in section 5, there is a growing demand for organic, sustainably produced food and beverage products. Animal welfare has also grown to be a key concern for many Norwegian consumers in recent years.⁸

⁸ Euromonitor International: Economies and Consumers, 2022.

3.3.2 Cultural sensitivities and other considerations

There are many interesting and important cultural sensitivities and other considerations that should be kept in mind when entering the Norwegian market. Those listed below are the ones which stand out as particularly important for exporters of food and beverage products.

Egalitarianism

Norwegian society like many Nordic countries is categorised by the culture of egalitarianism, that is to say, that on average Norwegians rarely consider themselves to be above anyone else regarding social class and within the working hierarchy. The shared distribution of wealth coupled with the desire to ensure everyone has an equal opportunity is the foundation of Norwegian society and further reflects why consumers place a lot of trust in government institutions in the country. While inequalities exist in Norway as in any other country, Norway is still largely known for being a much more egalitarian society when compared to other countries.

Individualism

Norwegians are known for being quite individualistic, this is to say that Norwegians value personal privacy and generally do not enquire too much about each other's personal lives. Norwegians also value personal space and speaking in a quieter tone with any deviations from these cultural norms being largely met with confusion. It's best to respect the personal space of Norwegians, expect that they may prefer to work on their own rather than within a group and speak in a clear and neutral tone without much emotional expression.

Gift giving

Gift-giving in Norway is very common, with an old Norwegian saying stating that a gift should be valued with an equal gift in return. Dinner parties, visiting old acquaintances, and local holidays are the most common events which encourage gift giving with flowers, an alcoholic beverage or a chocolate confectionary product being commonly gifted items.⁹

Festivals and holidays

Many of Norway's holidays and festivities are common also in other western European countries such as valentine's day and Christmas, but there are also celebrations revolving around the celebration of the Norwegian state. A full list of major holidays is found below:

- **New Year's Day** is a public holiday in Norway. The day is heavily family-oriented and large-scale celebrations are rare, instead, there are numerous firework displays across the country to celebrate the new year which is often enjoyed within the family unit.
- **Easter** in Norway involves three public holidays Maundy Thursday, Good Friday and Easter Monday. Many Norwegians take advantage of these days off to go on vacation either within the country or abroad.

⁹

Norway, E-Diplomat Available at http://www.ediplomat.com/np/cultural_etiquette/ce_no.htm#:~:text=Give%3A%20flowers%2C%20chocolates%2C%20wine,day%20of%20the%20dinner%20party.

- **Labour day** falls on the first of May and is a public holiday in Norway. The day is celebrated with various parades throughout the country which are often organised by the country's large labour unions.
- **Constitution day** falls on the 17th of May and is the national holiday of Norway. The day is a wide-scale celebration of the Norwegian state and customs and is marked by concerts, parades and fireworks.
- **Ascension Day** falls on the 26th of May and is a religious and public holiday in Norway.
- **Christmas Day** is a large celebration in Norway and is marked by the consumption of traditional Norwegian dishes such as baked cod.
- **St Stephan's day** falls on the day after Christmas and is also a large celebration in Norway with a typical activity on this day including travelling to the forest or coastline for a walk with the family.

Important cultural symbols

Norway's rich history, Viking heritage and the natural environment influence many of the important cultural symbols found in Norway (and commonly on the packaging and advertisement of food and beverage products). Notable important cultural symbols include:

The Norwegian Flag

The Norwegian flag is a source of pride for many consumers in the country (which is also common throughout Scandinavia). Many domestically produced food and beverage products will commonly display the Norwegian flag prominently on their packaging and the display of the flag is often an indication of high quality by many consumers.



Natural environment

Norway is home to what is often referred to as one of the most visually stunning natural environments in the world with the country having many fjords, mountain ranges and a unique arctic climate in the north of the country. The natural environment often is displayed on food and beverage packaging products and is a great source of pride for Norwegians who understand and appreciate the unique beauty of their country's environment.



Viking iconography

Norwegians are quite proud of their Viking past and Viking iconography is often used to symbolise that a food and beverage product is of Norwegian origin. Norwegians also often are quite knowledgeable about their Viking heritage and are happy to share this knowledge with outside visitors.

4 Market access and entry

This section provides details on the necessary requirements for entry into the Norwegian market, outlining existing market access restrictions and explaining procedures. A summary of market access and entry is presented in section 4.1, in the form of a SWOT analysis.

4.1 Summary SWOT analysis

STRENGTHS (+)	WEAKNESSES (-)
▪ A geographically close market, made up of wealthy consumers. ▪ A high concentration of potential consumers in just a handful of key cities provides a clear and concise target market for EU exporters. ▪ The Norwegian climate and topography limit its ability to produce food and beverage products on a large scale, resulting in the need for the country to import a large amount of its food and beverage products. ▪ Norway is a member of the European Economic Area (EEA), and benefits from close trade ties and largely similar legislation with the EU.	▪ Ban on the advertisement of alcoholic beverages coupled with the government restricting the sale of alcoholic beverages above the ABV of 4.75%. ▪ Overall, the market can be considered fairly small but logistically challenging. Beyond Oslo and other southern cities such as Trondheim, Bergen and Stavanger, the rest of the country is geographically disperse and transport logistics can be difficult. ▪ Processed agricultural products (PAPs) from the EU are subject to high customs tariffs.
OPPORTUNITIES (+)	THREATS (-)
▪ Increasing interest in healthier variants of EU food and beverage products such as a rise in demand for organic/sustainably produced, fat / trans-fat free, and low-no alcohol products. ▪ Cultural similarities with EU Member States make it less of a difficult market to advertise when compared to other third countries. ▪ Reduced tariff rates for certain products throughout the year opens a window of opportunity to expand exports to Norway, mainly impacting fruit and vegetable or certain dairy products.	▪ Norwegian government has a 50% self-sufficiency target for agricultural products. Furthermore, there is a policy of supporting farming across the country, independent of geographical conditions; and to close the income gap between farmers and other professions. This leads to notable subsidies. ▪ The return to normal cross-border trade with Sweden and also Denmark following the end of the pandemic impacts total sales of agri-food products in Norway itself. ▪ Calls to raise taxes on certain processed food products in Norway which are already fairly expensive.

4.2 Food and beverage legislation and regulations

The Norwegian Food Safety Authority (*Mattilsynet*) is responsible for regulations relating to safe food and drinking water. Mattilsynet is also involved in areas concerning human, plant, animal and fish health. The Ministry of Agriculture and Food is responsible for the institutional management of *Mattilsynet*. While Norway is a member of the European Economic Area (EEA), the trade of agricultural and food products is not completely liberalised, despite the close ties that the EU retains with Norway in this sector. Preferential trade between the EU and Norway is ruled by article 19 of the EEA agreement which entered into force on the 1st of October 2018. Norwegian food and veterinary legislation has been harmonised with that of the EU. This includes food production and safety, animal and plant health, animal welfare, alien organisms, and gene technology. In general, import requirements are the same as in the EU, and only products coming from the EU list of exporting countries, species, and establishments may be imported into Norway.

4.2.1 Import requirements/restrictions, customs procedures and documentation

The general documentation requirements for shipments to Norway are set out in Table 4-1. A summary of specific requirements by food and beverage type covered in this handbook is set out in Table 4-2 with further explanations regarding some of the general registrations / notifications required for food products provided thereafter. As a general rule, documents on the exporter side can be in English or Norwegian.

Table 4-1: General requirements for goods exported to Norway (including F&B)

Name	Description	To be prepared by	Language
Entry summary declaration for imports from third countries	A document providing the Norwegian Customs with the necessary information for risk-assessment of imports from third countries. In this context, third countries are defined as countries outside the security zone of the European Union (EU) including Norway and Switzerland.	Carrier (or his agent)	NO or EN
Cargo declaration	A document providing the details of a vessel with regards to the goods loaded therein.	Carrier (or his agent)	NO or EN
General declaration	A document providing the details of a vessel regarding its general characteristics.	Carrier (or his agent)	NO or EN
Customs import declaration	Official for the customs clearance of goods.	Carrier (or his agent)	NO or EN
Declaration of dutiable value	A document containing all the necessary information for the assessment of the value of a shipment.	Carrier (or his agent)	NO or EN
Certification of non-preferential origin	A document certifying the non-preferential origin of the goods to be imported.	Exporter	NO or EN

Name	Description	To be prepared by	Language
Commercial invoice; pro forma invoice	A document containing the details of the transaction.	Exporter	NO or EN
Air Waybill	A document containing the details of the transportation of products by air and proving the transport contract between the consignor and the carrier's company. One Air Waybill may be used for the multiple transshipment of products.	Carrier (or his agent)	Usually in English
Packing List	A document containing the details of the shipment and serving as a basis for the treatment of goods by customs.	Exporter	NO, EN or DE
Bill of Lading	A document containing the details of the international transportation of products by sea.	Carrier (or his agent)	Usually in English
Proof of preferential / non-preferential origin	A document confirming the preferential / non-preferential origin of the goods to be imported. While not always necessary, it may be requested by customs or the importer if there are doubts about the origin.	Exporter	NO or EN
Rail Waybill	A document notifying of international transportation of goods by rail. Must conform to the convention concerning international carriage by rail (COTIF) and the agreement concerning international freight traffic by rail (SMGS).	Carrier (or his agent)	One of DE-FR-EN
Waybill	A document notifying of international transportation of goods by road.	Carrier (or his agent)	EN
Register of business enterprises	A document certifying that business entities have been entered into the register of business enterprises.	Carrier (or his agent)	NO. Special requirements are needed to allow another language.

Source: European Commission Access2Market

Table 4-2: Specific market entry requirements mapped to handbook categories

Name and description	Fresh meat	F&V	Dairy	Alcohol (spirits, wine, beer)	Olive oil	Chocolate	Pasta	Processed Meat	Processed F&V	Biscuits / cereal bars	Baked goods
Notification to deal in agricultural goods A document certifying that importers and dealers of live animals, plants, animal and plant products, seeds and foodstuffs have informed the Norwegian food safety authority (<i>Mattilsynet</i>) about the commencement of their activities.	X	X	X	X	X	X	X	X	X	X	X
Registration of importers with the Norwegian food safety authority (<i>Mattilsynet</i>) A document certifying that importers of live animals and animal products, plants and plant products, foodstuffs and animal feed are registered with the Norwegian Food Safety Authority.	X	X	X	X	X	X	X	X	X	X	X
Registration with the European Trade Control and Expert System (TRACES) A document certifying that both exporters and importers of live animals and animal products, plants and plant products as well as of certain feed and food of non-animal origin imported from designated third countries of origin are registered with the European Trade Control and Expert System in its New Technology version (TRACES-NT).	X		X					X			
Common health entry document for products A document notifying the importation of animal products of third-country origin (i.e. countries outside the European Economic Area - EEA), certifying that the consignment has been inspected upon arrival and that the release of these goods on the Norwegian market is permitted.	X		X					X			

Import permit for goods covered by CITES <i>(Only required for goods covered under the HS codes 0201.10, 0201.20 and 0201.30)</i> A document permitting the actual importation of species covered under the convention on international trade in endangered wild fauna and flora (CITES).	?							?			
Veterinary health certificate for animal products A document confirming that products of animal origin to be imported have been inspected according to appropriate procedures, are not contaminated and do not carry any contagious diseases and are considered to conform with the current veterinary regulations of the importing country.	X		X					X			

Source: Agra CEAS based on Access2Market

X = required for the category; ? = only required for category in specific cases, consult Access2Market for more details

In terms of the **main bodies** responsible for controlling imports and customs:

- The Federal Customs Service of Norway (*Tolletaten*) of the Ministry of Finance is responsible for the system of customs fees/charges and also for carrying out customs control.
- The Ministry of Industry, fisheries and Trade is responsible for non-tariff regulation. This includes areas such as licensing and quota administration.

Tariffs vary by product, but in some cases they can be quite high (notably for certain meat, dairy and confectionery products). It should be noted that tariffs for some fruit and vegetable products change on a seasonal basis.

It should be noted that **tariff rate quotas (TRQs)** are in existence for several agricultural products in Norway. Some of these TRQs are open to all WTO members and certain ones are bilateral. The EU has several dedicated TRQs as a result of negotiations with Norway (see also section 4.3.4). *Landbruksdirektoratet* is responsible for TRQs. It provides a general overview of TRQs, in English, at the following link:

<https://www.landbruksdirektoratet.no/en/industri-og-handel/tariff-rate-quota>

And details of the TRQs in force, including the countries that can benefit from them can be found at the following link (in Norwegian). TRQs are sorted by category (products of animal origin; fruit and vegetables; grains, seeds, oilseeds etc; and potted plants / grass).

<https://www.landbruksdirektoratet.no/nb/industri-og-handel/toll-og-import/tollkvoter/tollkvoter-for-import>

4.2.2 Food safety and other food certification requirements

As a member of the EEA, Norway conforms with the EU General Food Law (Regulation (EC) No 178/2002), which sets out the general principles and requirements of the EU's harmonised food law. The Norwegian Food Law is called "*Matloven*" (Food Act). The Food Act provides the Norwegian regulatory framework for food products and food safety issues and applies to domestically produced and imported products.

4.2.3 Labelling Requirements

The EU's legislation on general labelling and nutritional labelling is applied in Norway (through Norway's EEA incorporation). EU requirements regarding food labelling are laid out in the "Food Information to Consumers (FIC)" Regulation (EC) No 1169/2011. The legislation has been implemented in Norway via the Norwegian Food Information Regulation (*Matinformasjonsforskriften*). The FIC legislation has been enforced in Norway since November 2014 and is applicable for all pre-packaged food and drink products marketed in the country, including those imported from non-EU countries. In addition, a mandatory nutrition declaration requirement has been introduced by the FIC regulation that went into effect on December 13, 2016. In addition to the general requirements laid out by the general FIC Regulation, Norway has incorporated three supplementary paragraphs outlining several national requirements, which pertain to language requirements, labelling requirements on the origin of specific food categories, and labelling requirements of genetically modified (GM) foods. In terms of language, Norwegian must be the language displayed on all labels in the country; on top of this, it is common for

Swedish, Danish and at times Finnish or Norwegian to appear on the label of packaged food products.

Article 16 of the EU FIC Regulation states that the declaration of the list of ingredients is not mandatory for beverages containing more than 1.2 per cent of alcohol by volume. In practice, however, most Norwegian beer brewers declare the list of ingredients on their labels.

Table 4-3: Alcohol labelling requirements by alcohol type

	Beer (with alcohol)	Wine	Spirits
Name and address of the producer	X	X (plus bottling facility)	X
Value of alcohol %	X		
Min % ethyl alcohol by volume	X	X	X
Bottling date	X	X	X
Composition	X		X
Mass concentration of sugars		X (except dry wines)	X (if sugar in formulation)
Type	X		
Nutritional information			
Storage information	X		
Expiration date		X (if alcohol under 10%)	X (if alcohol under 10%)
Classification based on sugar content		X	
Year of harvest		X	
Mandatory warning			

In Norway, **organic food production** is regulated by the Organic Regulation which is supervised by the Ministry of Agriculture and Food and the Ministry of Trade and Industry and is based on the EU standard for organic production. The new EU Organic Regulation came into effect on January 1, 2021, and has been adopted by the Norwegian authorities. DEBIO controls organic products on the market, both domestically produced and imported, on behalf of the Norwegian Food Safety Authority. DEBIO is a member of IFOAM (International Federation of Organic Agricultural Movement) and is well known to Norwegian consumers. Currently, DEBIO's label, the Ølabel, is used for all approved organic foodstuffs and looks like this (right). It is worth noting that, in 2022, Norwegian Organic legislation was aligned with the new EU organic legislative package.



Article 35 of the EU FIC Regulation allows the use of additional forms of expression or presentation of the nutrition declaration, which has been implemented in countries such as France, Belgium and Germany with the traffic lights label. Norway has joined the **keyhole nutrition labelling** scheme (*Nøkkelhullet*), a voluntary Nordic label for food which is being used in all Nordic countries. In Norway, the Directorate of Health and the Norwegian Food Safety Authority are responsible for this labelling scheme (left).

Products marked with the *Dyrevernmarket* (**animal welfare label**) have been produced according to criteria determined by the Norwegian Animal Protection Alliance (*Dyrevernalliansen*). Farms that are certified with the animal welfare label are checked by an independent inspector at least once a year. This label is voluntary, and its criteria are set out by a third-party organisation (right).



Further, Norway has implemented the EU Directive for packaging and packaging waste (Council Directive 94/62/EC) through an agreement between Norwegian Trade and Industry associations and the Ministry of Environment. There are separate agreements for each type of packaging material. These agreements cover packaging such as plastics, beverage cartons and cardboard, corrugated cardboard, and glass.

Norway has also implemented the same legislation as the EU concerning food additives, enzymes, and flavourings. Regulation (EC) No 1333/2008 harmonises rules on the use of food additives in the EU and EEA countries, like Norway. The competent authority in Norway for food additives is the Ministry of Health and Care Services.

4.2.4 Protection of intellectual property rights, including geographical Indications (GIs)

The Norwegian industrial property office is the body responsible for IP in Norway.

The EU geographical indications (GI) scheme provides the legal protection of foodstuffs which have a close link to a specific region as well as traditional specialities. Norway operates its national legislation for the protection of geographical indications on foodstuffs, which is modelled on the EU GI scheme. The Norwegian scheme is laid down in Regulation No. 698 of the 5th of July 2002 which covers areas concerning the protection of designated food origin products, geographical indications and the traditional specialities of foodstuffs.

Any foodstuffs which have been granted GI status in the EU may further apply for the same protection in Norway. The protection of EU GI products is administered by the Norwegian Food Safety Authority (*Mattilsynet*). The protection of GIs for EU wine and spirit names is included in the EEA agreement.

Figure 4: The Norwegian Geographic Protection label (left) EU GI label (right)



Searching for intellectual property in Norway

There is an online database of intellectual property in Norway. This can be found, in Norwegian and English, at: <https://www.patentstyret.no>

There are links to the different registries by type of intellectual property and query method.

4.2.5 Relevant authorities for IPR and GI protection and further contacts

The Norwegian industrial property office

Postboks 1344 Vika, Oslo

✉ post@patentstyret.no

GI registration: Post@norskmat.no

🌐 <https://beskyttedebetegnelser.no/>

4.3 International trade

4.3.1 Norway and foreign trade

Given that Norway is a large exporter of fossil fuels coupled with the country having a large domestic demand for high-value products produced from outside the country such as cars and machinery items, the incentive to trade with Norway for a third country is clear. Norway is a member of the European Free Trade Association (EFTA) which is a regional free trade area made up of Iceland, Switzerland, Norway and Liechtenstein. It is important to note that EFTA itself is not a customs union; consequently, its member countries have the right to pursue their own trade agreements with third countries outside of the framework of EFTA.

4.3.2 Key trade agreements, present, and future

Norway, as a member of EFTA, has several key free trade agreements with countries located within its immediate vicinity and further afield. These trade agreements help to solidify the country's shift towards becoming a trade-oriented economy. The main agreements are listed in Table 4-4 below.

Table 4-4: Chronological list of Norwegian trade/economic agreements with third countries/regions

Partners	Type of agreement	Entry into force
EFTA inception <i>Iceland, Liechtenstein, Switzerland</i>	Free trade Area	1960 (Original inception)
European Union <i>Originally signed as the European Community</i>	Free trade agreement	1973
Israel	Free Trade Agreement	1993
Faroe Islands	Free Trade Agreement	1995
Palestinian Authority	Free Trade Agreement	1999
Morocco	Free Trade Agreement	1999
Mexico	Free Trade Agreement	2001
North Macedonia	Free Trade Agreement	2002
Jordan	Free Trade Agreement	2002
Singapore	Free Trade Agreement	2003
Chile	Free Trade Agreement	2004
Tunisia	Free Trade Agreement	2006
South Korea	Free Trade Agreement	2006
Lebanon	Free Trade Agreement	2007
Egypt	Free Trade Agreement	2008
SACU <i>South Africa, Botswana, Eswatini, Lesotho, Namibia</i>	Free Trade Agreement	2008
Canada	Free Trade Agreement	2009
Albania	Free Trade Agreement	2010
Serbia	Free Trade Agreement	2010
Colombia	Free Trade Agreement	2011
Peru	Free Trade Agreement	2011
Ukraine	Free Trade Agreement	2012

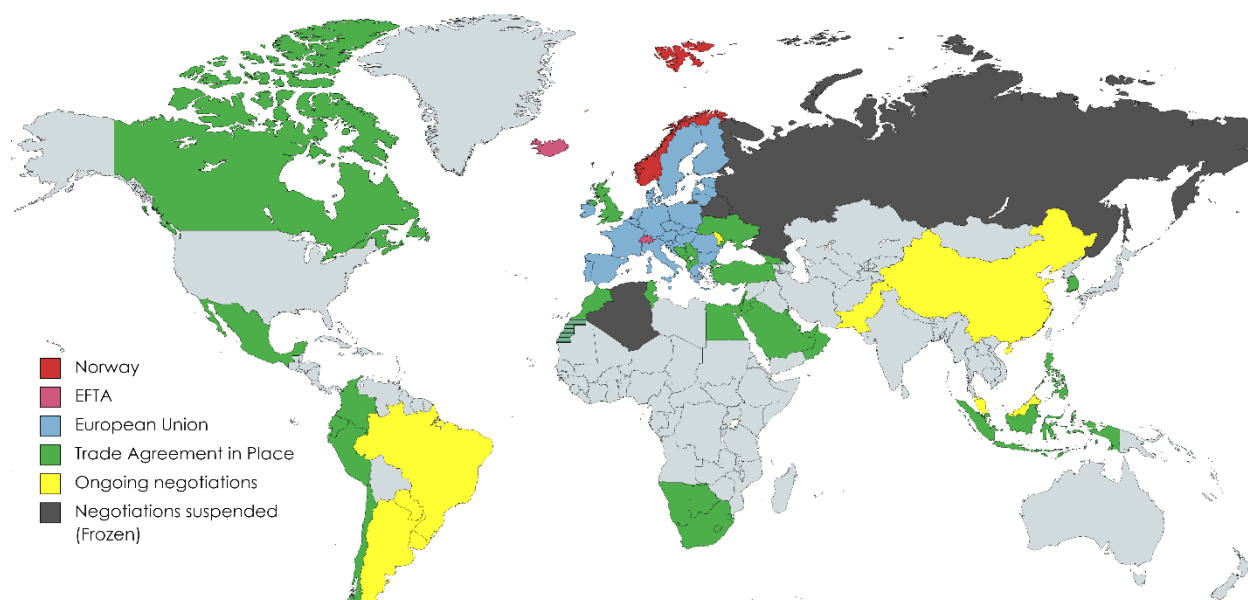
Partners	Type of agreement	Entry into force
Montenegro	Free Trade Agreement	2012
GCC <i>Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, UAE</i>	Free Trade Agreement	2014
Central American States <i>Costa Rica, Guatemala, Honduras, Panama</i>	Free Trade Agreement	2014
Bosnia-Herzegovina	Free Trade Agreement	2015
Georgia	Free Trade Agreement	2018
Philippines	Free Trade Agreement	2018
Ecuador	Free Trade Agreement	2020
Turkey	Free Trade Agreement	Modernised in 2021
Indonesia	Free Trade Agreement	2021
UK	Free Trade Agreement	2021

Source: Agra CEAS based on various

FTAs that Norway is currently in negotiation or that are pending ratification include:

- Norway-China FTA
- Norway-Moldova FTA
- Norway-Malaysia FTA
- Norway-Mercosur FTA
- Norway-Pakistan FTA

Figure 4-5: Overview of Norway's current and prospective trade agreements



Source: Norway-Country commercial guide, International Trade Administration, Available at <https://www.trade.gov/country-commercial-guides/norway-trade-agreements#:~:text=The%20agreements%20cover%20trade%20in,Moldova%2C%20Mercosur%2C%20and%20Vietnam>

4.3.3 EU- Norwegian trade and co-operation agreement (TCA)

As Norway is a member of the European Economic Area (EEA) this also means that the country is a member of the EU single market which allows for the freedom of movement of people, goods, services and capital. The EEA is the closest agreement possible short of full EU membership which means that Norway enjoys many of the benefits of full EU membership despite not being a member. As a member of the EEA Norway has also agreed to adopt certain EU legislation relating to consumer protection, social policy and the environment. The EEA Agreement does not cover the following EU policies: common agriculture and fisheries policies (although the EEA Agreement contains provisions on trade in agricultural and fish products, customs union; common trade policy; common foreign and security policy; justice and home affairs (the three EEA EFTA States are however part of the Schengen area); direct and indirect taxation; economic and monetary union.

4.3.4 WTO disputes and other trade barriers

As discussed, agriculture is not covered by the EEA agreement. However, Article 19 of the agreement highlights the commitment of the parties to continue the progressive liberalisation of agricultural trade, which is achieved through the conclusion of separate agreements.

Against this background, it should be noted that the EEA Agreement foresees reviews of (basic) agricultural trade every two years, with a view to progressive trade liberalisation. Since the EEA Agreement entered into force in 1994, it has only been possible to renegotiate the conditions for agricultural trade four times (2002, 2006, 2011 and 2017). The fourth, most recent round of negotiations to further liberalise trade in agricultural products¹⁰ was launched in February 2015 and concluded and signed in 2017, with the agreement entering into force on 1 October 2018. It included both (1) compensation in form of tariff rate quotas for the effects of the tariff switch measures, as well as (2) a mutual liberalisation of 36 tariff lines and the opening of (additional) quotas by both sides. The outcome of the negotiation, including the TRQs in existence specifically for the EU can be found in the official document at the following link: [https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:22011A1209\(01\)&from=EN](https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:22011A1209(01)&from=EN)

Today one major barrier relating to the trade of agricultural goods from the EU to Norway stands out, this barrier is:

EU exports of processed agricultural products (PAPs)

EU export possibilities in PAPs to Norway remain significantly impacted by high custom tariffs based on the EEA Agreement, Protocol 3. Despite the fact that the Protocol foresees annual consultations to make sure that the terms are adapted to market developments and new concessions, there have been only two adaptations since the entry into force of the EEA Agreement in 1994. The spirit of the agreement was to reduce overall tariffs between both markets, however tariffs for PAPs remain. This impacts the trade of products such as buttermilk, frozen vegetables, margarine, sugar confectionary, chocolate confectionary, pasta, bread, pastries, cakes, biscuits, jams, ice cream, beer, vinegar and certain wines and spirits.

¹⁰ This is under Article 19 of the EEA Agreement

Further information, as well as an up-to-date list of trade barriers, can be found here:

<https://trade.ec.europa.eu/access-to-markets/en/barriers/>

4.3.5 Summary of key trade barriers

As discussed, the implementation of tariffs by Norway relating to processed agricultural products (PAPs) is a very important and largely the sole trade barrier in place between the EU and Norway. The tariff impacts many EU agricultural exports and is something that has been actively challenged by the EU in an effort to remove or reduce the tariff rate for these products.

4.4 Operating in the Norwegian food and beverage market

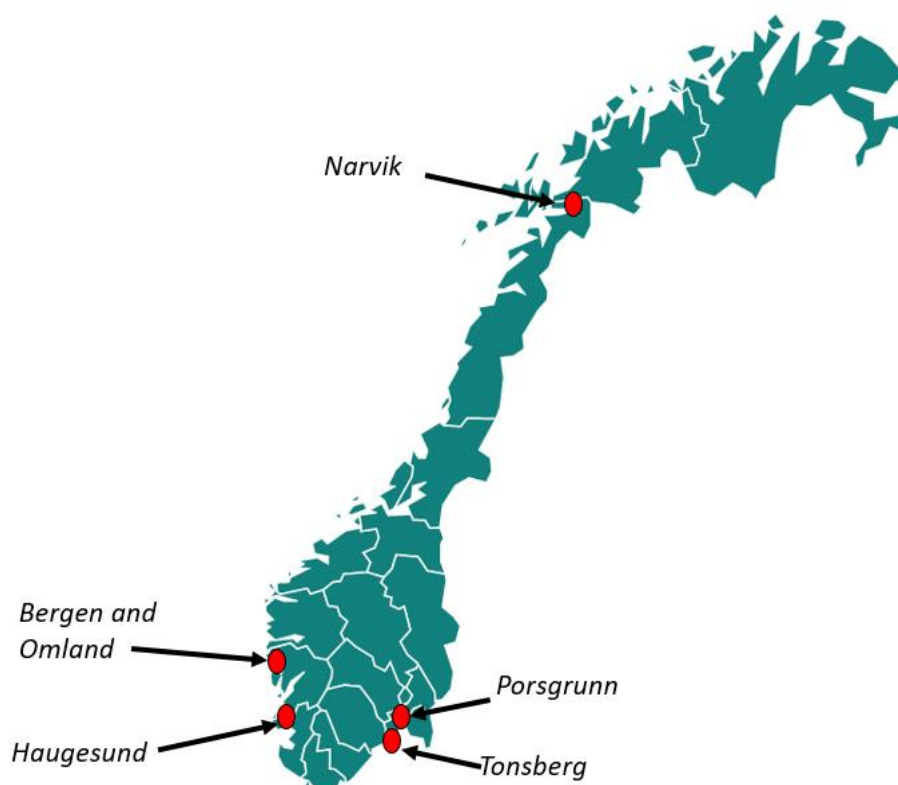
4.4.1 Logistical services and transportation infrastructure

As the major population and economic centres are located in the southern region of Norway surrounding the city of Oslo, most of the country's more developed transportation infrastructure is located in the south of the country. Indeed, the largest port, airport and train terminal are all located in Oslo with there being smaller logistical hubs spread out across the country. Due to the unique shape of Norway, quite often it is quicker to travel via Sweden when driving from the north to the south of Norway as the country is quite mountainous which limits large-scale transportation development. Still, in recent years the country has made major strides in linking up its northern region to the south and transportation infrastructure outside of the Oslo region continues to expand allowing for the country to enjoy further interconnectivity.

Shipping

Shipping both historically and presently is a large industry in Norway and plays a key role in the movement of people and goods across the country. While Oslo is home to the largest port by passenger traffic, it is not within the top five largest ports by cargo traffic, which are the ports of Bergen and Omland (67 million tonnes), Narvik, (24 million tonnes), Porsgrunn (12.8 million), Haugesund (8.2 million) and Tonsberg (6.9 million).¹¹

¹¹ Ranking of ports in Norway in 2021 based on volume of cargo, Statista, available at <https://www.statista.com/statistics/1068339/ranking-of-ports-in-norway-based-on-cargo-volume/#:~:text=Based%20on%20the%20volume%20of,above%2024%20million%20metric%20tons.>

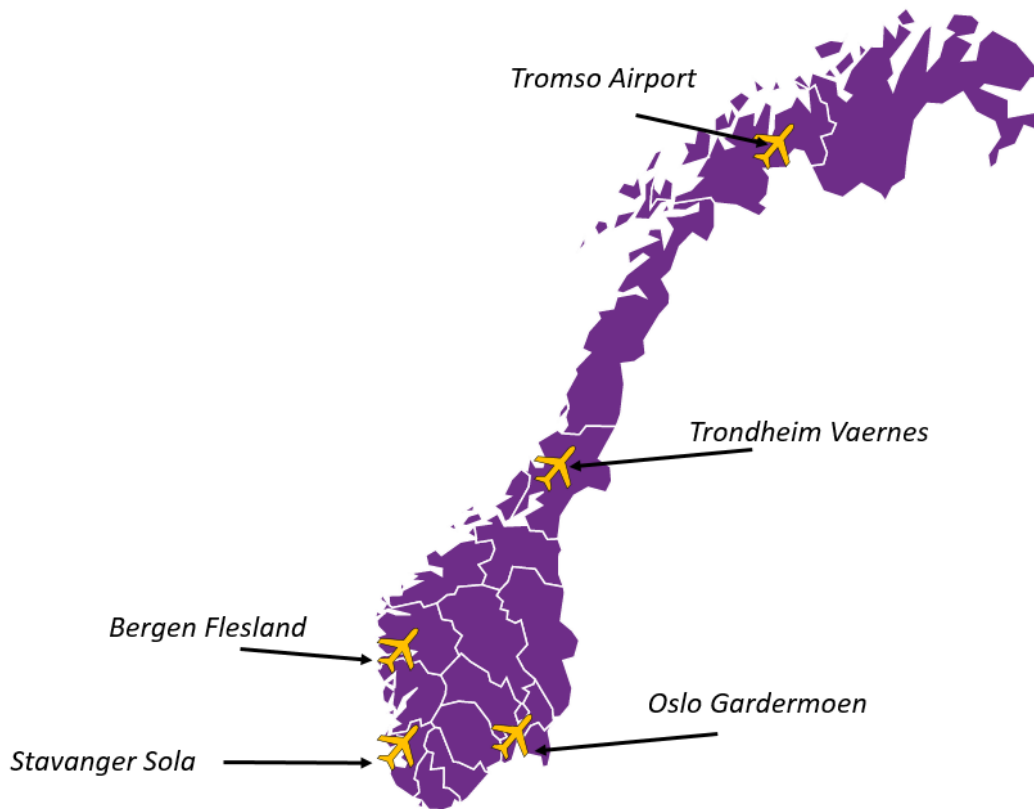
Figure 4-6: Major ports in Norway

Source: Agra CEAS based on various

Airfreight

The use of airfreight in Norway as a means of cargo movement has grown in recent years as the country has invested in key infrastructure projects including the expansion of freight capacity at various airports. The five largest airports by cargo traffic in Norway include Oslo Gardermoen, Stavanger Sola, Bergen Flesland, Trondheim Vaernes and Tromsø airport.

Figure 4-7: Major international cargo airports in Norway

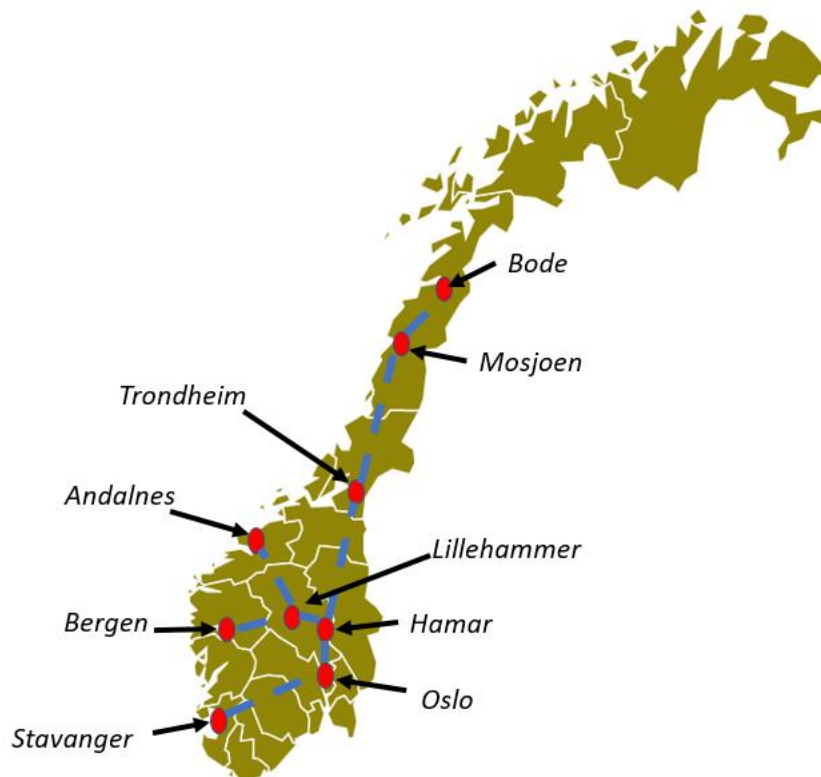


Source: Agra CEAS based on various

Rail freight

Rail freight has also grown in Norway in recent years with the railways accounting for the movement of 37 million tonnes of freight in 2021, although the use of rail to move food and beverages is more limited when compared to raw materials. There are also a number of freight-only rail lines in Norway although the majority are small and act as connections to quarries or ports.¹²

¹² Annual and Sustainability Report 2021, Vy Group, Available at <https://www.vy.no/globalassets/vy.no/filer-en/arsrapporter/2021-annual-and-sustainability-report.pdf>

Figure 4-8 Major rail freight lines

Source: Agra CEAS based on various

Road Freight

Norway has invested a large amount of money into its public road infrastructure in recent years which has helped interconnectivity within the country. Most of the larger motorways are focused within the southern region of the country around the city of Oslo and the border with Sweden. The use of road freight to transport food and beverages in Norway is common, especially from ports or via neighbouring Sweden.

4.4.2 Distribution – retail channel overview

The Norwegian consumer market is focused on the four major cities of Oslo, Bergen, Stavanger and Trondheim and their immediate hinterlands. This means that the market in Norway is quite concentrated within the south and coastal regions which is a reflection of the country's population distribution. The domestic market is quite small by European standards which has resulted in many Norwegian retailers also being small and not well-known outside of the country. Consumer goods in Norway are infamously expensive, with groceries in the country costing as much as 50% more than the EU average.¹³

Supermarkets

The largest hypermarket and supermarket retailers in Norway are COOP Norge, REMA and Norgesgruppen (which owns Meny a large retail chain in Norway). Norgesgruppen has a market share of 44%, followed by COOP with a 29% share and Rema with a 23% share.¹⁴ Norway's domestic retail market is dominated by domestic retailers and has a notable absence of large EU supermarket chains such as Lidl and Aldi, with Lidl notably pulling out of the Norwegian market. The Norwegian market is not influenced by low-cost retailers; instead, the larger retailers will focus on selling certain low-cost products.

Department Stores

International and domestic department stores focus mainly on the larger urban centres of Oslo and Bergen. Notable department stores in Norway include Steen & Strøm and Sandvika Storsenter which are both located within the vicinity of Oslo. The limited population distribution across Norway has held back the mass development of department stores across the country; in those that are found in the country, there is a notable presence of domestic brand labels over foreign brands.

Convenience Stores

Small shops and convenience stores are located throughout Norway, and within the north of the country these outlets are the major distributors of food and beverages. Kiwi is the largest convenience store chain in Norway with roughly 650 stores spread across the country (Kiwi is also present in the Danish market). Other large convenience store chains in Norway include Rema 1000, Joker and Spar.

Food markets

Food markets are a common sight in most Norwegian cities and towns. In Oslo, it is common to find many food markets located within metro stations with notable examples being Mathallen, Maschmann's food market and Rustal food market. Outside of Oslo and in smaller towns, food markets commonly function as both a social gathering and an opportunity to purchase fresh produce with fish products being a common sight in the average Norwegian food market.

¹³ Norwegian citizens consume 25 per cent more than the average EU citizen, at some of the highest prices, ScienceNorway.no, available at <https://sciencenorway.no/consumer-spending-consumption-economy/norwegians-consume-25-per-cent-more-than-the-average-eu-citizen-at-some-of-the-highest-prices/2048875>

¹⁴ Market share of selected grocery retailers in Norway in 2020, Statista, available at <https://www.statista.com/statistics/565757/market-share-of-selected-grocery-retailers-in-norway/>

E-commerce

The Norwegian e-commerce market is well established, with the country ranking as the world's 26th most valuable e-commerce market with a revenue of EUR 7.6 billion in 2021.¹⁵ While the majority of the Norwegian e-commerce market is focused on the sale of electronics and household furniture, there is a sizeable market for the distribution of food and beverages with 17% of women and 13% of men utilising e-commerce to purchase food and beverages in 2021, a share which is expected to continue growing.¹⁶ Notable fast food or grocery delivery applications which have grown in recent years in the Norwegian market include Wolt and Foodora.

4.4.3 Intermediaries

The main two categories of local partners are:

- **Local commercial agents** tend to understand the landscape well and can help target suitable customers. Furthermore, they may be able to assist with advertising / promotion and overcome language barriers, but exporters should be able to keep control over branding and pricing. More specialised agents may be particularly of interest. However, it should be noted that commercial agents can be relatively expensive (they may charge a flat fee or take a percentage of total sales, or a combination of both). They may also have relatively lesser retailer coverage than wholesalers.
- **Importers and wholesalers** tend to have wider distribution channels and take care of the packaging and other compliance regulations. However, it should be noted that a major disadvantage of pursuing importers and wholesalers is the loss in the ability to retain branding and pricing since wholesalers often set the price and packaging of the product. Another disadvantage lies in the large number of brands that wholesalers represent, which may present a form of competition for exporters and result in a less dedicated coverage of a certain product.

Below are listed some considerations when choosing a partner for different end markets

- **Retail.** Exporters should aim to work with partners (more likely retailers and wholesalers) who have established connections with major retailers. When looking at importers in particular, it is necessary to consider the wider network of the importer – that is to say the wholesalers and/or second importers they work with. Assessing the price segment and quality of the product being exported can assist in identifying the correct partner, with the network likely to be of increasing importance for higher volume products.
- **Food service.** Commercial agents are often a good option due to their knowledge of the local market. This local knowledge can be harnessed to help identify hot spots for certain products.
- **Alcoholic drinks.** The situation is a little different for these products. Generally it is necessary to work with importers which either supply *Vinmonopolet* (plus supermarkets in the case of alcohol content under 4.75% - typically importers will target both) and/or on-trade outlets. There are some importers which specialise in a certain type of product, e.g. wine. It should be noted that suppliers of imported products to *Vinmonopolet* must be

¹⁵ The E-commerce market in Norway, E-commerce DB, available at <https://ecommercedb.com/markets/no/all>

¹⁶ Share of consumers who bought food and beverages online in Norway in 2021, by age group, Statista, available at <https://www.statista.com/statistics/615940/share-of-online-food-and-groceries-shoppers-in-norway-by-age-group/>

wholesalers registered with the Directorate of Customs and Excise as liable for duty (domestic producers must have a licence for producing alcohol in Norway). A list of all wholesalers with a required licence is available on the *Vinmonopolet* website at the following link:

<https://vmp.sharepoint.com/:x:/s/Vinmonopoletslanseringslister/EfkUAELI6nVEn53N2ACdcPMBKN4cYRZSSykMh6CwSDPA-w?rttime=8V3MIGoO20g>

Some overarching general considerations for choosing/working with an intermediary and exporting products to Norway are:

- As far as possible, it is generally more attractive to work with a partner which specialises in the product in question – whether this partner is an agent or importer/wholesaler.
- Capturing seasonality can help boost exports. Certain products are increasingly preferred during specific times of the year. For example, there is a high demand for imports of fruits and vegetables during the winter season, with imports accounting for the majority of domestic fruit and vegetable sales. In contrast, in the summer, retailers buy more from local producers. Similarly, December is the best-performing month for imported alcohol sales in both off-trade and on-trade. Certain dark beers in particular can do well during Christmas.
- It is important to take note of key consumer trends. For instance, *Vinmonopolet* launches new products in its catalogue six times a year, emphasising origin and style, such as innovative forms of packaging. *Vinmonopolet* releases a list of specifications such as retail price, packaging, and vintage for the new brands it seeks to launch, with these specifications are based on consumer demand and broader national trends. The complete list for the year 2023 can be found at <https://www.vinmonopolet.no/new-product-launches>
- Harnessing key labelling strategies can assist sales. Norway has an increasing health and wellness trend, with consumers opting for more health-conscious options when choosing foodstuff. Consequently, labels such as the “Keyhole” label are popular and products with this label can differentiate themselves and take advantage of the growing demand for healthier products.
- Exporters should keep an eye on macroeconomic trends, with inflationary pressures most notably having the potential to greatly impact the sales of various products. While inflation in Norway has been a bit lower than in the EU region of late, it is still expected to shift demand from more premium products to more economic products due to decreasing spending power. While the lower price sensitivity of Norwegian consumers is expected to provide some support, a downtrading is nonetheless expected.

Finally, exporters of certain agri-food products to Norway should be aware of the indirect competition they face from cross-border trade. This is particularly strong for alcoholic beverages, where the combination of high excise duties and VAT push up prices in Norway considerably. However, it can also affect other products with fairly high excise rates. This cross-border trade is predominantly (85% plus) with Sweden due to its proximity to the majority of the Norwegian population; though it also occurs with Denmark to an extent. While it is difficult to put a figure on the “market share” of cross border trade, the experience of the Covid-19 pandemic provides some indications. With travel restrictions for Norwegians wanting to visit and return from Sweden, domestic off-trade sales increased considerably. Post pandemic, a 20% fall in sales volumes of alcohol has been reported by some importers supplying *Vinmonopolet*, indicating that cross-border trade may effectively account for up to 1/5 of alcohol sales.

Business Contact Database:

A database of importers, wholesalers, retailers, and distributors can be found in section 8.5.

N.B. due diligence will have to be performed for any contacts on this database as no warranty is given as to the standing of these individuals, organisations or firms, and no corresponding responsibility or liability is accepted by the authors.

4.4.4 Business environment

The business environment of Norway is quite open and international, particularly around the cities of Oslo, Bergen and Stavanger. Oslo is home to many companies which operate internationally in the finance, oil, gas and maritime sector. Prior to the end of the World Bank's 'ease of doing business' index in 2020, Norway consistently ranked among the top ten nations, achieving the status of "very easy". The well-educated workforce coupled with a relatively easy taxation regime makes the country very open to international business. The government of Norway has also encouraged foreign investment into the country as it seeks to pivot away from oil and gas revenue dependency.

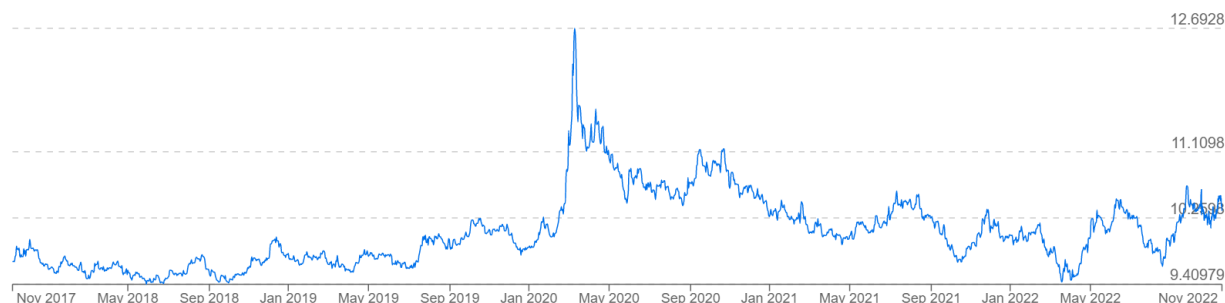
4.4.5 Key operational considerations and challenges: summary

Key challenges to bear in mind when operating in the Norwegian market are:

- Although the country's land area is large by European standards, the absolute majority of business activity is likely to take place in either Oslo, Bergen or Stavanger as these are the three cities with the largest population, as well as being the largest business hubs in Norway and home to the largest domestic and foreign organisations located in the country.
- While most Norwegians speak English (88% of the population), it is appreciated if you use a couple of phrases in Norwegian such as "Hvordan gar det?" (How are you?) or "Snakker du English?" (Do you speak English?). Many Norwegians are also knowledgeable in either Swedish, German, Danish or French although English is the most widely spoken second language in the country.
- Norwegians tend to shake hands upon first meeting with a potential business partner and the exchanging of business cards is quite common in the country.
- Norwegians are quite punctual and will not appreciate being left waiting; to avoid any immediate ill feelings it is best to inform the person you are meeting ahead of time that you may be late.
- Norway extends over a large area: being asked to conduct business between Oslo and another Norwegian city, particularly a city located in the north, will likely involve the need to fly or the need to undergo a long albeit picturesque trip.
- Norway is an expensive country: expect to pay more for virtually every consumer goods product, as the country implements high taxes on alcohol and other food and beverage products.
- Norwegians are quite reserved and tend to not discuss issues such as politics, religion and the family; it is best to stick to more neutral topics.
- The floating exchange rate between the Euro and the Norwegian Kroner (NOK) needs to be kept in mind when conducting business in Norway. Figure 4-9 below shows the currency exchange rate EUR-NOK for the past five years (end of 2017 - end of 2021). This graph highlights the high levels of fluctuation that occur in the currency exchange rate.

During this period, the exchange rate ranged from 1 EUR = 9.5 NOK in December 2017 to 1 EUR = 10.5 NOK towards the end of 2022.

Figure 4-9: Five-year evolution of the EUR-NOK currency exchange rate: 2016-2021



Source: XE Currency converters: Euro to NOK exchange rate chart, available at [Euro to Norwegian Krone Exchange Rate Chart | Xe](#)

4.4.6 Other relevant information

Methods of payment in Norway

The currency of Norway is the Norwegian Krone (NOK). Most major ports of entry will have a kiosk or helpdesk available to transfer Euros, Danish Krone and Swedish Krona into NOK. The British pound and US dollars are also commonly exchanged at airports or ports. Euros are not generally accepted in Norway with the small exception being for establishments located near tourist attractions albeit at the retailer's discretion. Overall, it is best to obtain Norwegian Kroner for day-to-day activities. Norway is well accustomed to the usage of electronic cards as a method of payment with the country's vendors accepting VISA, Mastercard and American express amongst others.

Travel from the EU to Norway

Travelling to Norway from the EU is relatively easy as the country is a member of the European Economic Area (EEA) which allows for the freedom of movement for both Norwegians travelling to the EU and EU citizens travelling to Norway. EU citizens also retain the right to reside in Norway should they choose too. Oslo Gardermoen airport is the largest in the country and is commonly also used to transit to other destinations in Norway. EU citizens can also travel via road from Sweden or Finland to Norway or take a ferry from Denmark or Sweden.

5 Market Snapshots for Selected Products

This section provides specific information for various food and beverage categories and products. This information covers three main categories:

- **Consumption:** data on the evolution of consumption; consumer profiles and any notable consumer trends;
- **Offer:** domestic production; imports and exports; the competitive landscape; relevant specific customs procedures/import considerations;
- **Distribution:** main distribution channels used; domestic and imported offer.

Furthermore, each category contains a SWOT analysis and a key takeaways message.

Fresh meat	Fresh fruit and vegetables	Dairy
Wine	Spirits	Olive oil
Chocolate confectionery	Beer	Pasta
Pasta	Processed fruit and vegetables	Processed meat
Biscuits / cereal bars	Baked goods	Ice cream

5.1 Fresh meat

5.1.1 SWOT analysis

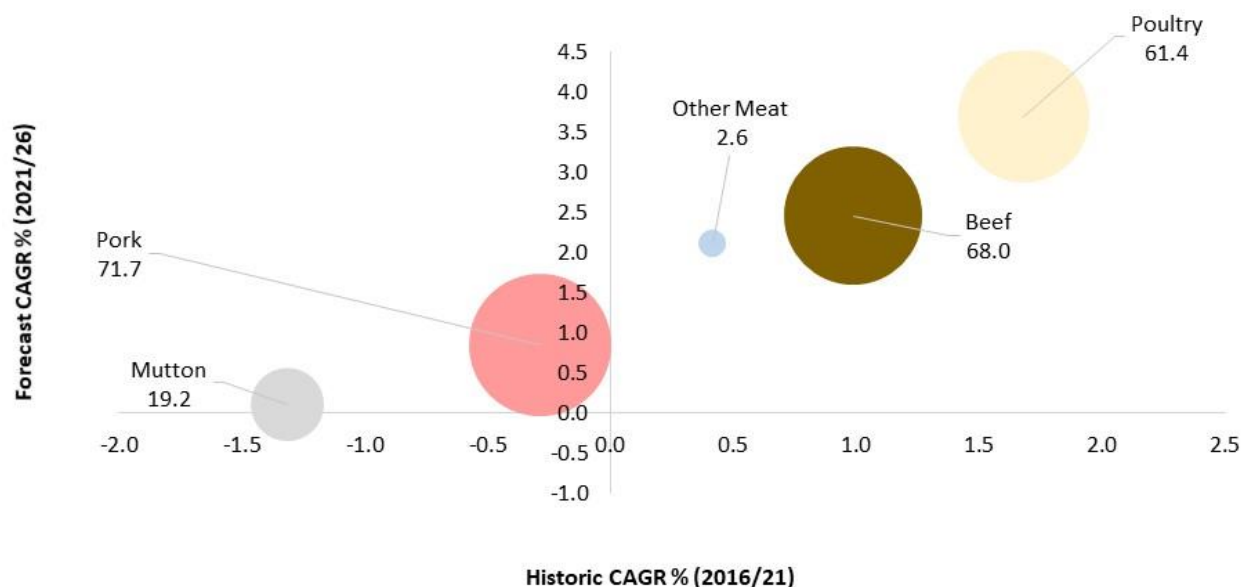
STRENGTHS (+)	WEAKNESSES (-)
▪ The EU accounts for the absolute majority of fresh meat imports by Norway. ▪ The country is a member of the single market making it one of the easiest third countries to export fresh meat for EU Member States. ▪ Similar demand for cuts of meat which are also mass produced in EU Member states.	▪ Younger consumers increasingly adopting a vegetarian lifestyle. ▪ Norwegians largely prefer to consume seafood products rather than fresh meat products. ▪ A large amount of fresh meat is consumed via traditional dishes which incorporate meats that are produced domestically in Norway such as sheep meat and beef.
OPPORTUNITIES (+)	THREATS (-)
▪ A well-developed and concentrated market makes it easier to target consumers in Norway. ▪ Products which are able to demonstrate an appreciation for the welfare of the animal or use of sustainable production practises will resonate with younger consumers. ▪ The rise in demand for red meat substitute products can be seized upon by existing producers to grow revenues in what is a growing market in Norway.	▪ Domestic production of fresh meat highlighted as a priority by the Norwegian government in its bid to increase self-sufficiency; and domestic products dominate retail outlets. ▪ It is rare to find imported fresh meat products in mainstream supermarkets. ▪ Norway currently negotiating a potential trade agreement with Mercosur and China which are two large producers of fresh meat products. Namibia, a notable competitor, already has a trade deal.

5.1.2 Consumption

Evolution of consumption

Figure 5-1 below shows that pork is the most popular fresh meat product in Norway with a total volume of 71 700 tonnes. Pork is expected to grow by a CAGR of 0.8% between 2021 and 2026. Beef is the second most popular fresh meat product in Norway with a total volume of 68 000 tonnes. Beef is expected to grow by a CAGR of 2.5% between 2021 and 2026 which will make it the second fastest-growing fresh meat product in Norway, the fastest growing being poultry which will grow by a CAGR 3.7% between 2021 and 2026. Poultry currently has a total volume in Norway of 61 000 tonnes as of 2021. Mutton has a total volume of 19 000 tonnes and its consumption is expected to remain almost stable between 2021 and 2026.

Figure 5-1: Evolution and forecast of the fresh meat market in Norway, 2021-2026; total volume (000 tonnes)



Source: Euromonitor International: Fresh Food, 2022.

Consumers

Per capita consumption of fresh meat in Norway is around 68 kg, which is lower than in neighbouring nations such as Sweden (73 kg) and Denmark (79 kg);¹⁷ although it should be noted that reindeer meat is often consumed in Northern Norway and is not included in per capita consumption statistics of meat. There are several factors which explain why meat consumption is lower in Norway; these include the high price of certain meat products, the popularity of seafood in the country and a mixture of environmental and health concerns.

Consumers of fresh meats such as beef and pork tend to be urban consumers of a middle income class or above, as these varieties of meat are expensive in Norway. The high price of meat in Norway reflects both the limited domestic production of these products and the lack of large-scale farms in the country to produce large volumes of beef and pork products. Poultry is cheaper in Norway (although expensive by European standards) and appeals to lower-income earners or consumers who limit their total red meat consumption. Consumers in Norway have increasingly adopted a vegetarian diet in recent years and today around 10% of the population follows a vegetarian diet. Overall, men are greater consumers of meat than women (red meat in particular). Women are more likely to prefer poultry to red meat. Region influences meat consumption slightly. There is a slight tendency to prefer fish to meat in many coastal regions (e.g. Ålesund); while in the north of the country, reindeer meat is particularly popular. Segment more likely to consume imported meat include higher-income consumers (due to the higher price of these products); and

¹⁷ OECD data, meat consumption, available at <https://data.oecd.org/agroutput/meat-consumption.htm>

immigrants from EEA countries plus the UK, which constitute around 7% of the total Norwegian population.

Drivers and method of consumption

Key drivers of meat consumption in Norway include:

Traditional meal consumption

While Norwegians are generally more known for their traditional consumption of seafood rather than fresh meats, there are several pork and beef dishes which are traditionally enjoyed in Norway; these include *Svinestød med frukt* (pork loin with fruit), *Julekyrdret ribbe* (spiced pork ribs) and *fårikål*. Fårikål is often viewed as a national dish of Norway and consists of a mutton and cabbage stew. It is noted also that reindeer meat is popular for consumers particularly in the North of Norway in more isolated pockets of the country, where the herding and consumption of animals constitute a key source of income and protein; reindeers are often herded in the north of the country and are a common and unique fresh meat product offered through various restaurants and convenience stores, particularly in central and northern Norway

Convenience

The comparatively cheap price of certain meat cuts (e.g. mince), their flexibility and the quick preparation of certain recipes make these popular with many consumers – families or those catering for larger groups in particular. Meat also fits nicely into the popular format of “potato dinners” – which comprise a protein source such as red meat or chicken; potato (or sometimes rice or pasta); and sauce. Many Norwegians typically structure meals around this format.

Seeking alternative proteins

Fresh meat products such as beef, poultry and pork offer a key alternative for Norwegians who are more accustomed to the consumption of seafood products, particularly within cities on the coast and south of the country. Norway has one of the highest seafood consumption rates per capita in the world and while this does ultimately negatively impact the total consumption of fresh meat, it does create the driver of seeking alternative protein products that are not seafood based.

Festive occasions

Meat's traditional importance has made it an important component and marker of local festive occasions such as Christmas. For instance, for Christmas dinner, just under half of the population choose pork belly, and just over a third choose cured lamb ribs. Turkey and pork roast are the other popular meat cuts. In contrast, under 5% of the population eat non-meat dishes for Christmas dinner such as rice, porridge, cod or pizza.

Looking specifically at cuts which are particularly popular in Norway and where there may be opportunities for imported products:

- Pork – is associated with festive occasions, with pork belly particularly popular at Christmas, creating a spike in demand
- Beef – ground beef is a popular and versatile staple used in many traditional dishes.
- Lamb – chops are very popular, and they are typically grilled or roasted. Dry cured ribs are popular at Christmas, however.
- Poultry – breast is the most popular cut overall and are used in a wide range of dishes. However, there is demand for thighs driven by their use in some traditional dishes; and wings driven by their popularity for barbecues.

Purchase criteria

Beef and pork are the most expensive fresh meat products in Norway and with that comes heightened expectations surrounding the flavour and texture of these products. Norwegians, particularly younger consumers, are increasingly concerned about the welfare of the animal and will seek out producers which have a track record of animal welfare and relevant certification. Also, as 4% of the population is Islamic, this segment of the population will seek out halal-based fresh meat products. Cost-sensitive Norwegians appreciate meat products that are domestically produced as these products tend to be cheaper than imported fresh meat products due to the combination of high tariffs on imports and domestic production subsidies. Indeed, domestic products tend to dominate retail outlets, with domestically produced products often indicated through the presence of the Norwegian flag.

Fresh meat on retailers' shelves in Norway

The fresh meat retail market is dominated by domestically produced products due to the combination of subsidies and high tariffs. As a result there is very little, if any, imported fresh meat; though imported processed meat products can be found on shelves.



Above: chilled fresh meat section in a large retailer.

Retail prices for meat vary depending on meat type and cut, but as a rough guide, cheaper pork and poultry cuts retail around NOK 50 to 100 (EUR 4.40 to EUR 8.80) per kg. Standard red meat cuts and more expensive poultry and pork cuts retail in the range of NOK 100 to 200

(EUR 8.80 to 17.60) per kg. Premium products tend to retail at over NOK 200 (EUR 17.60) per kg.



Above: detailed information provided on a fresh meat product label.

Fresh meat products are most commonly sold pre-packaged in flexible packaging. Front of pack labels can contain extensive information including nutritional information. It is common for the Norwegian origin of meat to be indicated on the packaging – either through the NYT Norge symbol, or through the written origin. It is also possible to find products with the Norwegian keyhole symbol.



Above: fresh meat products with the NYT Norge symbol for Norwegian origin and Nordic keyhole. Below: written origin on a fresh meat product.



Photos © Euromonitor International / Agra CEAS, 2023.

Recent market trends

There has been a rise in vegetarianism in Norway in recent years, particularly amongst younger consumers and a total of around 10% of the population follows a vegetarian diet. An even larger proportion of the population has decided to reduce their total meat consumption or to switch to meats which have less of an impact on the environment; this is one of the key factors behind the rise of poultry meat consumption in Norway in recent years. Fresh meat consumption per capita in the country remains behind other Northern European countries and is unlikely to catch up as the total growth in consumption forecasted in Norway is minimal when accounting for population growth. Going forward, poultry will be the fastest-growing fresh meat product in Norway and will likely begin to rival pork and beef for the position of most consumed fresh meat product by 2026.

5.1.3 Offer

Domestic production

Fresh meat in Norway is one of the country's strongest agricultural sectors, with the sector producing around 80% of the national demand for beef¹⁸. Overall, according to the Norwegian

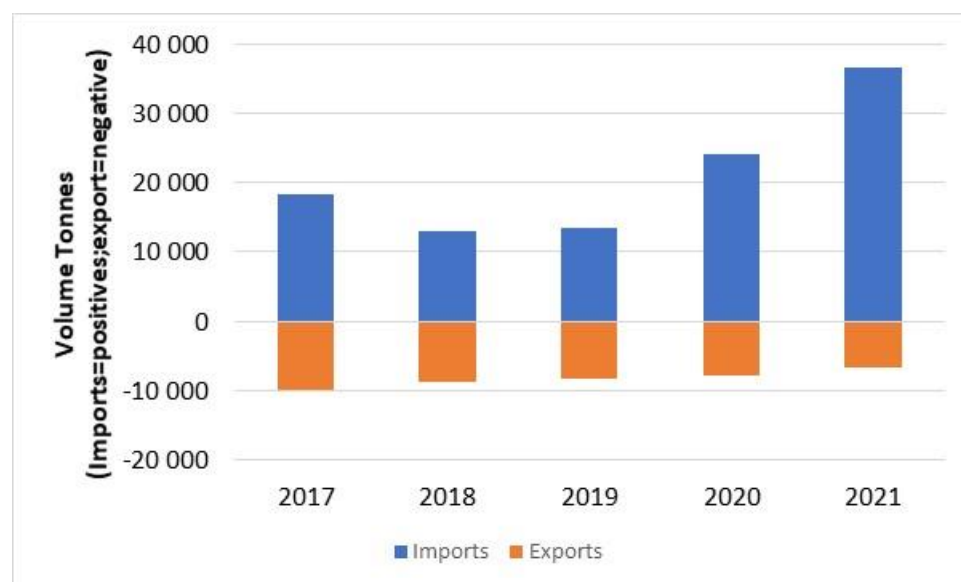
¹⁸ Family farming: the key to food producing in Norway, Tine, available at <https://www.tine.no/english/about-tine/family-farming-the-key-to-food-production-in-norway>

statistics office, the country in 2021 produced 57 515 tonnes of poultry, 66 800 tonnes of pigmeat, 40 400 tonnes of bovine meat and 1 800 tonnes of sheep meat.¹⁹ Production tends to be focused within the south and central regions of the country as this region tends to provide the most optimal conditions for cattle and animal husbandry. The northern regions of the country tend to focus more on the herding and culling of reindeer meat which is largely only consumed in the region it has been produced.

Imports and exports

Figure 5-2 below shows that Norway has become a net importer of fresh meat having a trade deficit in the product for the past three years. Exports are slowing down and now stand at around 6 600 tonnes. Norwegian imports have increased rapidly in recent years from 13 300 tonnes in 2019 to 36 500 tonnes in 2021.

Figure 5-2: Trade balance (imports and exports) of fresh meat in Norway, 2016-20 (tonnes)



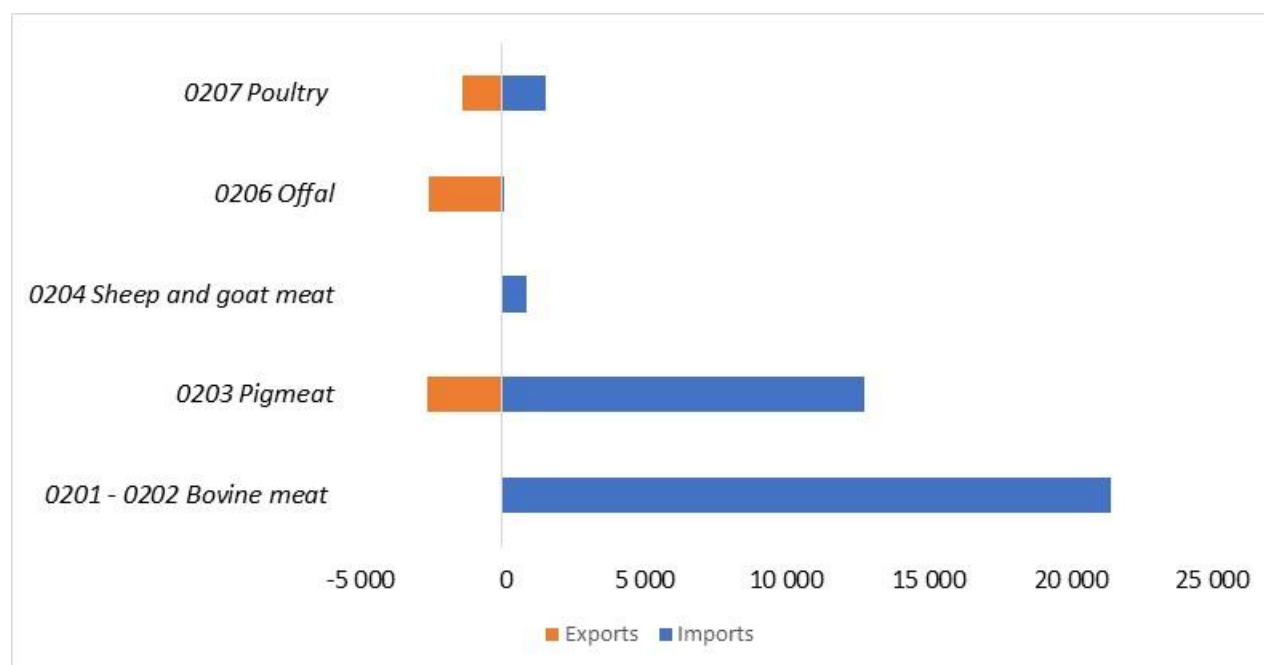
Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN codes 0201, 0202, 0203, 0204, 0206, 0207.

Figure 5-3 shows that beef represents the most important by volume fresh meat product imported into Norway, with a total of 21 500 tonnes imported in 2021. Pig meat imports follow, at 12 000 tonnes in 2021. Poultry is amongst the least imported fresh meat products.

¹⁹ Meat Production, Statistics Norway, available at <https://www.ssb.no/en/statbank/table/04181/tableViewLayout1/>

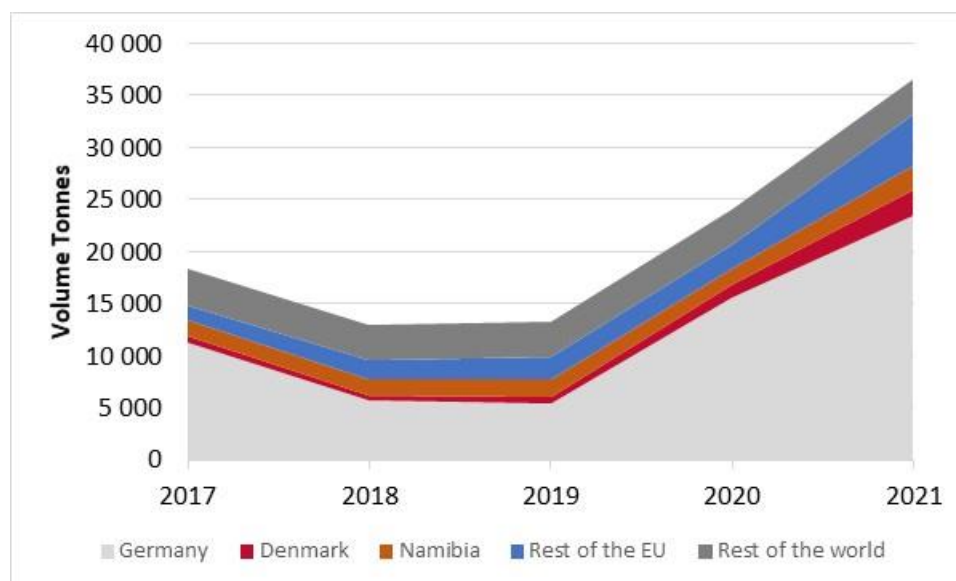
Figure 5-3: Trade balance (imports and exports) of fresh meat in Norway, by type, 2021 (tonnes)



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN codes 0201, 0202, 0203, 0204, 0206, 0207.

Figure 5-4 shows that Germany has been the largest exporter of fresh meat to Norway in recent years. Germany alone accounts for nearly two thirds of all fresh meat imported by Norway in 2021, with beef and poultry being amongst the largest categories. German exports of fresh meat to Norway have grown significantly in recent years, with Germany the leading exporter by far. The second largest exporter to Norway is Denmark, which largely focuses on exports of pork. Namibia is the third-largest exporter of fresh meat and the largest non-EU exporter of fresh meat.

Figure 5-4: Norwegian imports of fresh meat by country, 2017-21 (tonnes)

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 0201, 0202, 0203, 0204, 0206, 0207.

EU GI products

As noted in section 4.2.4 there is legislation for registering GIs in Norway. No GIs for fresh meat have been identified as having been registered.

Main competitors

The main trade-based competitors for EU fresh meat products in Norway come from the country's domestic production of meat products. Norway produces around 80% of its domestic demand for beef and sheep meat and is increasing its production of poultry meat as poultry consumption continues to grow in the country. The Norwegian government has highlighted the country's domestic production of fresh meat as one of the key sectors in the country's effort to increase its self-sufficiency in food production. Namibia is the largest exporter of fresh meat from outside of the EU with the country mainly exporting beef products and benefitting from a trade agreement with Norway. Outside of Namibia, total imports from non-EU countries are minimal and do not pose a major challenge for EU products in the country.

5.1.4 Specific market entry requirements

Market Access and Entry

Fresh meat products exported from the EU to Norway are subject to a general tariff of around 101 NOK (9.60) per kg although this varies by product and cut of meat. Fresh meats originating from the EU benefit from a preferential tariff rate set by Norway. In order to export fresh meat products to Norway, you require proof that your product is registered with the European Trade Control and Experts system (which is also required within the EU itself). You must also inform the

Norwegian Food Safety Authority that you intend to export your product to Norway and obtain a document stating this, which is to be given to the Norwegian custom officials.

Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:

Main page – select product, country of origin and destination country:

<https://trade.ec.europa.eu/access-to-markets/en/home>

Example link – poultry category (0207) from Sweden to Norway

<https://trade.ec.europa.eu/access-to-markets/en/search?product=0207&origin=SE&destination=NO>

Standards, SPS measures, labelling

Regulations about requirements, prohibited substances not allowed for use in these products, quality requirements etc. are mostly the same as in the EU due to effort to harmonised Norwegian food safety requirements with EU legislation. It is the responsibility of the importer that the imported foodstuff is safe for human consumption and that the labelling and the content comply with Norwegian food regulations. The products must be labelled in Norwegian or in a language that resembles Norwegian (Swedish or Danish are the only generally accepted alternatives). Both importers and first recipients must carry out internal controls and have procedures that ensure compliance with food legislation and the Norwegian national regulation concerning internal control (<https://www.arbeidstilsynet.no/regelverk/forskrifter/internkontrollforskriften/>).

5.1.5 Distribution

The majority of consumers purchase their meat from modern retail channels – most notably supermarkets, though also convenience stores and discounters. The fresh meat available through these channels though is almost exclusively Norwegian in origin. Specialist meat stores and butcheries tend to be popular with consumers looking for higher quality or more specialist cuts; and this can include specialist imported meat cuts. For example, Japanese *wagyu* beef, which is quite popular in Norway, typically will only be found in specialist meat stores. Online retailers, though a tertiary channel of distribution, are growing in popularity. Oda, an online retailer which offers a variety of different meat cuts, is one example of the growing availability of products through the online channel.

Food service is also an important channel for fresh meat distribution as a whole and imported products in particular. Restaurants which focus on certain cuisine styles are more likely to source their meat from specialist distributors and in some cases, may specifically request imported cuts of certain origins and qualities.

5.1.6 Challenges for EU products

Probably the main challenge for EU producers is the high cost of EU fresh meat in the Norwegian market when compared to domestic products. This is due to a combination of high import tariffs and domestic production subsidies. Nonetheless, Norway's does have a structural shortage of meat overall, and most notably of beef and pigmeat. Furthermore, there is an overall decline in

fresh meat consumption, particularly amongst the younger consumer base. EU fresh meats in the Norwegian market should make efforts to highlight their appreciation for the welfare of the animal, and/or their use of sustainable production practises, on the packaging of their products to resonate with more susceptible younger consumers in Norway. In the case that it is difficult to break into the retail market, the food service market may offer an alternative. Finally, it should be appreciated that the Norwegian diet is heavily influenced by the consumption of seafood which limits the overall potential consumption of other fresh meat products in the country; and that reindeer meat remains an important product consumed in the more remote areas in the north of the country.

Market Takeaway: Fresh meat

Consumption: Consumption of fresh meat in Norway per capita is lower than in other northern European countries with the consumer base being particularly more likely to consume seafood products over fresh meats. Pork is the most consumed fresh meat at the time of writing however beef and poultry are both quickly catching up.

Competition: Domestic production of fresh meats is the largest challenge for EU fresh meat products in the Norwegian market. Meat in Norway is generally expensive, and there is no price advantage for imported fresh meats over domestic meat products. Outside of Norway, Namibia is a small competitor in the beef market.

Distribution: Modern retail channels, supermarkets in particular are the main retail channel for fresh meat distribution. Specialist butcheries are more likely to stock higher quality cuts including some imported ones. Food service is also important for imported products.

Challenges: A consumer base which largely prefers to consume seafood products coupled with an overall decline in consumption amongst younger consumers are two big challenges for EU products in the market. Competing with Norwegian domestic meats which are cheaper (although still expensive) than EU fresh meat products and which dominate mainstream retail channels is also a challenge.

Opportunities: A well-developed and concentrated market make targeting consumers in the Norwegian market easier than in other third countries. Products which can emphasise their appreciation for the welfare of the animal or can showcase their use of sustainable production practises will resonate with younger consumers in particular.

5.2 Fresh fruit and vegetables

5.2.1 SWOT analysis

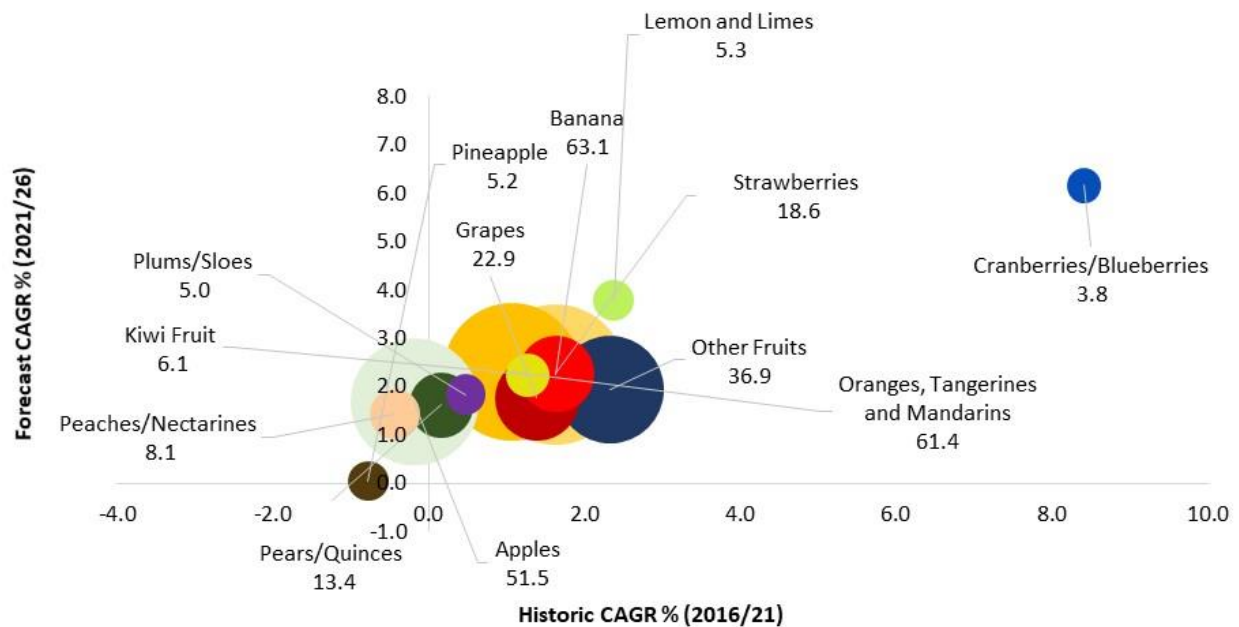
STRENGTHS (+)	WEAKNESSES (-)
- Across all fruit and vegetable products except pineapples, there is an anticipated positive CAGR between 2022 and 2026. - Norway's climate and topography limit the country's ability to mass-produce fruit and vegetables to meet domestic demand. - EU has a 70% share of all vegetable exports to Norway, and a 40% share of all fruit exports, with Spain being the largest exporter of both fruit and vegetables to the country.	- Total consumption per capita while higher than in other Northern European countries remain below the European average. - The high costs of fruit and vegetables in Norway may dissuade consumers from purchasing a variety of them in one sitting. - Norway has a trade agreement with large fruit and vegetable exporters such as Peru and South Africa.
OPPORTUNITIES (+)	THREATS (-)
- Reduced tariff rate during the winter months for products such as carrots and potatoes. - Rise in health consciousness amongst the consumer base post-COVID-19. - Fruit and vegetables which can be easily adapted into traditional Norwegian dishes such as Smørrebrød are placed to perform well in the Norwegian market. - Seasonality coupled with a strong reliance on imports provides different opportunities at different times of the year.	- Push by the Norwegian government to expand domestic production by increasingly utilising greenhouses. - Norway currently negotiating a potential trade agreement with China and the Mercosur bloc which are both large fruit and vegetable producers. - South Africa, the US and Peru are the biggest competitors from outside of the EU.

5.2.2 Consumption

Evolution of consumption

Figure 5-5 shows that bananas are the most popular fruit category consumed in Norway, with a total volume of 63 000 tonnes in 2021. This is followed by oranges, tangerines and mandarins, which sole category records a total volume of 61 400 tonnes, and apples with a total volume of 51 000 tonnes. Across all fruit categories with the exception of pineapples, further growth is forecasted, with the fastest-growing fruit category expected to be cranberries/blueberries which is predicted to grow at a CAGR of 6.1% between 2021 and 2026. This is far ahead of the second fastest-growing fruit category which is lemon and limes with a predicted CAGR of 3.8% in the same period. Bananas will remain the most popular fruit category by 2026 if the current predicted growth rates remain the same.

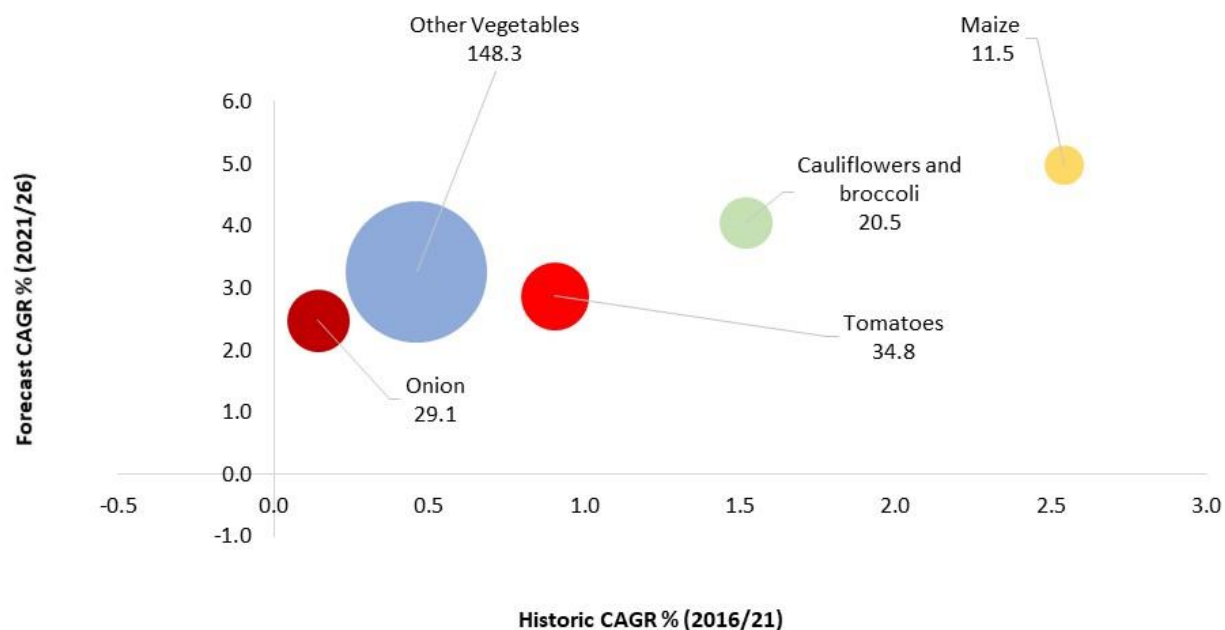
Figure 5-5: Evolution and forecast of the fruit market in Norway, 2016-2026; total volume (000 tonnes)



Source: Euromonitor International: Fresh Food, 2022.

Figure 5-6 below shows that 'other' vegetables, encompassing many diverse vegetable products, are the largest consumed vegetable category in Norway, with a total volume in 2021 of 143 800 tonnes. Tomatoes have a total volume of 34 800 tonnes which is followed by onions which have a total volume of 29 100 tonnes and cauliflower and broccoli which have a total volume of 20 500 tonnes. Maize, although currently the smallest category with a total volume of 11 000 tonnes, is expected to be the fastest-growing category with a predicted CAGR of 5% between 2021 and 2026.

Figure 5-6: Evolution and forecast of the vegetable market in Norway, 2016-2026; total volume (000 tonnes)



Source: Euromonitor International: Fresh Food 2022.

Consumers

With regards to Northern European countries, Norway has one of the highest per capita consumption of fruit at 78 kg, compared to 59 kg in Sweden and 63 kg in Denmark. However, Norwegian per capita consumption remains far lower than in the rest of Europe. Norwegian consumers of fruit can come from any background, although those more likely to diversify their fruit consumption will likely come from a middle-income to higher-income class, as fresh fruits in Norway are generally very expensive. Middle-aged to older consumers have a higher consumption of fruit when compared to younger consumers, driven by health concerns and increased appreciation for the health properties of the fruit.

Concerning vegetables, Norway has a lower per capita consumption at 71 kg when compared to other Northern European countries with a per capita consumption rate of 84 kg in Sweden and 83 kg in Finland. Again, Norwegian consumers of any background will readily consume vegetable products however those likely to diversify will again be likely to come from a middle-income to higher-income class due to price. Consumers living in urban areas are more likely to have access to a wider variety of vegetables which have been imported from abroad while rural consumers will be more likely to consume vegetables which can be grown locally and adapted to the colder climate of Norway, such as potatoes, onions and carrots.

Looking specifically at consumers of imported fruit and vegetables, it should be noted that, as an overall strong net importer of both categories, more or less all consumers will consume imported products to some extent. However, groups which are more susceptible to consuming imported products are:

- Higher income consumers, who are more likely to consume premium imported products which may not grow in Norway. Organic products in particular may be popular amongst this group.
- Immigrants of EU/EEA origin, who are used to certain fresh fruit and vegetable products popular in their country of origin.
- Older consumers (over 45) who tend to consume higher levels of fruit and vegetables overall; and who often specifically seek out certain products which tend to be imported in origin for their health benefits (such as citrus for vitamin C).

Drivers and method of consumption

Key drivers of fruit and vegetable consumption include the demand for health products among Norwegian consumers which has become even more apparent post-COVID-19. Norwegian consumers are well educated about the health benefits of fruit and vegetable consumption via government campaigns or via schools which tend to offer a piece of fruit for lunch to students. A key driver of vegetable consumption is its usage in traditional Norwegian dishes with notable examples being Norwegian potato dumplings and honeyed root vegetables.

Methods of consumption follow similar patterns to other European countries which include having a variety of fruits and vegetables plated separately at bigger family food gatherings and the perception of fruit and vegetables as being part of a healthy balanced diet. Also, in Norway, other methods of consumption include the association of fruit as a dessert item, with a bowl of fruit being commonly consumed after a meal. Finally, in Norway (and in other Scandinavian countries) the dish known as Smørrebrød is very popular; Smørrebrød consists of a piece of buttered rye bread topped with a variety of different ingredients which commonly incorporate pieces of fruit and vegetables such as lime, tomatoes and cucumber to name a few, either on their own or combined with fish/meat products.

Purchase criteria

Norwegians are accustomed to purchasing which have a foreign origin due to the colder climate of Norway limiting the variety and volume of domestic fruit and vegetable production. Consumers may often observe pieces of fruit or vegetables to look for imperfections before deciding to purchase, although generally minor imperfections will not deter Norwegian consumers from purchasing the product. Consumers are likely to take note of the price of fruit and vegetables as they tend to be quite expensive in the country; lower income earners are more likely to purchase one specific variety of fruit or vegetable for a set meal, rather than a variety of fruit and vegetables at once, due to price. Younger consumers are also more likely to pay attention to price.

Many Norwegian consumers will choose fruits based on seasonality; and this is fairly strongly linked to a preference for local produce due to the lower carbon footprint and support of the local economy. This leads to watermelons, melons, strawberries, and different berries being very popular during the summertime (even though domestic production of the former tends to be low). Festivals also play a role in terms of seasonal consumption, albeit without the link to local consumption. There is a longstanding tradition of buying oranges during Easter, with the event often perceived as symbol for the sunny days to come following a long winter. For Christmas, it is a common tradition to serve bowls of nuts, figs, and clementines.

Finally, there is a notable and growing group of consumers which pay attention to the organic status of fresh produce. It is estimated that around 1/5th of Norwegians tend to consider the

organic status of the product; and there is an overall willingness to pay extra for organic fruit and vegetables.

Fruit and vegetables on retailers' shelves in Norway

Pricing of fresh fruit and vegetables inevitably depends to an extent on the fruit / vegetable type; but also on the season. Prices for both fruit and vegetables generally start at NOK 20 (EUR 1.85) per kg, e.g. for some apples, oranges and root/leafy vegetables; but for rarer, more premium vegetables the price can be several times the above.

Fruit and vegetables are sold both loose and pre-packed. Indeed it is possible to find both loose and prepacked fruit/vegetables of the same type. Overall, the use of plastic (flexible or thin walled containers) is more common for vegetables than it is for fruit. In some cases, folding cartons are used for the packaging of fruit targeting the mid and higher end segments; and indeed the use of this material is becoming more common as producers try to address sustainability concerns. Some producers are carefully choosing the colour of the cardboard packaging to help highlight the colour of the fruit (e.g. black on the inside of strawberry cartons to make the red colour of the strawberries stand out).



Above: peppers sold both loose and prepacked in a large supermarket. Below: both loose and prepacked fruit and vegetables in a large retailer. The use of plastic for vegetable packaging and cartons for fruit can be seen.



It is not uncommon for there to be offers / discounts on fruit and vegetables in larger retailers (see below).



Above: offers on citrus fruit in a large retailer.

Photos © Euromonitor International / Agra CEAS, 2023.

Recent market trends

The outbreak of COVID-19 coupled with an effort from the government to raise awareness surrounding the health benefits of fruit and vegetable consumption has helped to raise demand in recent years for these products in the Norwegian market. As already stated at the beginning of this sub-section, with the sole exception of pineapples, all other fruit and vegetable products are expected to see positive growth in demand between 2021 and 2026. Although Norwegian consumers are increasingly growing curious about fruit and vegetables of a more exotic variety

such as durians or guava, going forward it will be fruit and vegetables commonly produced in the EU such as apples, oranges, strawberries and potatoes which will remain among the most popularly consumed fruit and vegetables in Norway.

With an inflationary environment, an increasing proportion of consumers - younger ones in particular - are putting an emphasis on price. Exporters such as Chile (apples) and South Africa (citrus) have been trying to remain price competitive in this environment; and this inevitably is creating pressure for competitors including EU exporters.

Finally, Norwegians are increasingly concerned about the impact of their consumption on the environment and may take additional steps to research the producer of fruit and vegetables from abroad and the methods used in their production practices. To this end, producers who can highlight the usage of sustainable production practices in growing and harvesting their fruit and vegetable products will be best positioned to resonate with an ever-environmentally conscious consumer base. Organic production is also benefitting partly as a result of this. It is worth noting that, while Norway is trying to increase its organic fruit and vegetable production, it ultimately cannot keep up with demand (see also below).

5.2.3 Offer

Domestic production

The bulk of fruit and vegetables consumed in Norway (up to 75%, depending on the year) have to be imported from abroad, given the country's limited capacity to produce a variety of fruit and vegetable products due to a combination of climate and topography. The total growing season in Norway is quite small (140-160 days) which limits the year-round production of fruit and vegetables to a large scale in the country.

The centre of fruit production in Norway is focused within the region of Hardanger with some 40% of Norwegian fruit coming from this region of the country. Other key regions of fruit production in Norway include Viken, Rogaland and Telemark, with typical fruits produced in these regions including apples, plums and cherries.

Vegetable production is relatively larger than fruit production in Norway, with the country producing a large volume of tomatoes, cucumbers and potatoes. That said, it is estimated that only 60% of potatoes consumed in Norway are produced in the country, with imports still needed to fill the gap. The main vegetable-producing regions of the country are in areas located around the Oslo Fjord, Rogaland and Frosta.

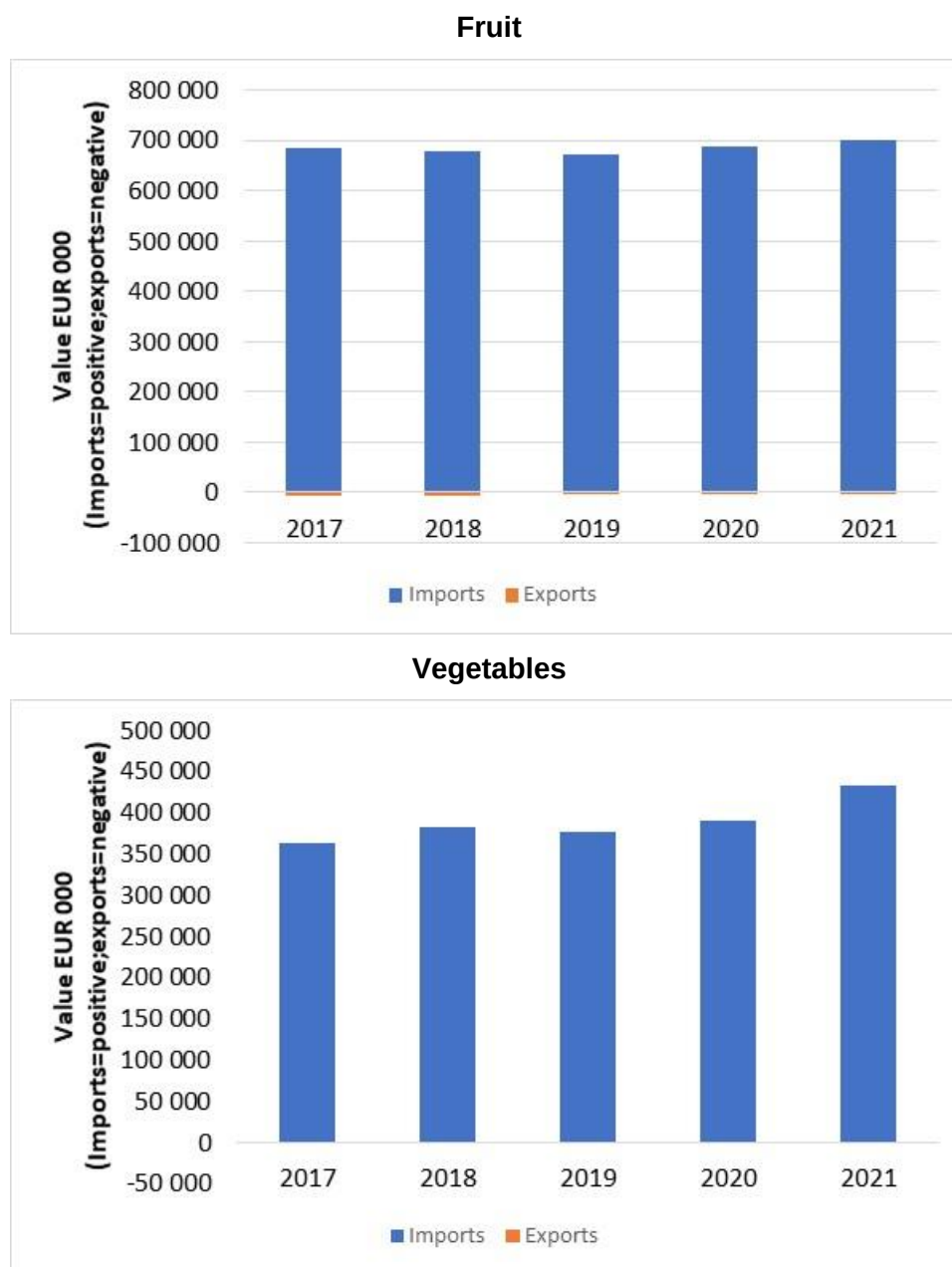
In terms of organic production, the Norwegian government had set a target of 15% of agricultural land to be organic by 2020; however this proved impossible to meet and was ultimately scrapped. It is estimated that around 5% of Norway's agricultural land was organic in 2020, well below the shares of its closest Nordic neighbours (e.g. Sweden and Denmark around 20% and Finland around 13%).

Imports and exports

As Figure 5-7 shows, Norway is by far a net importer of both fruit and vegetables. This reflects the small domestic production of fruit and vegetables in the country which falls considerably short of satisfying domestic demand; and the fact that many fruit and vegetable varieties cannot grow in the Norwegian climate and need to be imported. Norway imported EUR 433 million worth of vegetables in 2021, with total imports growing in value year on year between 2017 and 2021.

Fruit imports are even higher in value, with Norway importing EUR 700 million worth of fruit in 2021. Total exports of both of these products from Norway are minimal reflecting once again the country's small production capacity in specific products (e.g. berries).

Figure 5-7: Trade balance (imports and exports) of fruits and vegetables in Norway, 2017-21 (000 EUR)



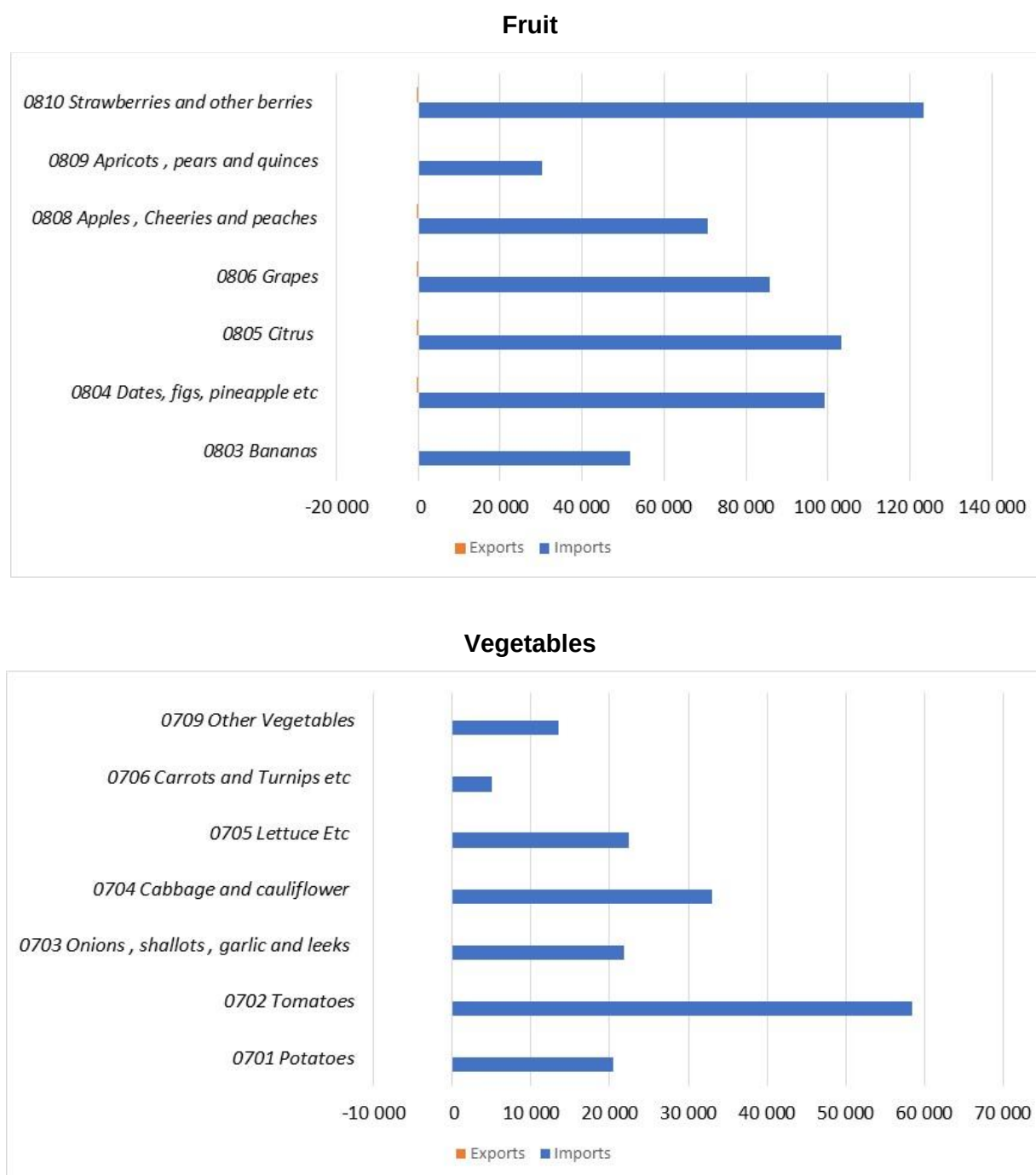
Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN codes 07 and 08.

Figure 5-8 shows which fruits are predominantly imported and exported by Norway. As observed, strawberries are the most imported fruit product in Norway, with total imports reaching a value of EUR 123 million in 2021. This is followed by oranges with a total import value of EUR 103 million.

In terms of vegetable imports, the highest-valued vegetable imports were tomatoes with an import value of EUR 58 million in 2021. Cabbages were the second highest, with an import value of EUR 33 million, followed by lettuce with an import value of EUR 22 million.

Figure 5-8: Norwegian trade balance of fruit and vegetables by type, 2020 (000 EUR; selected types only)



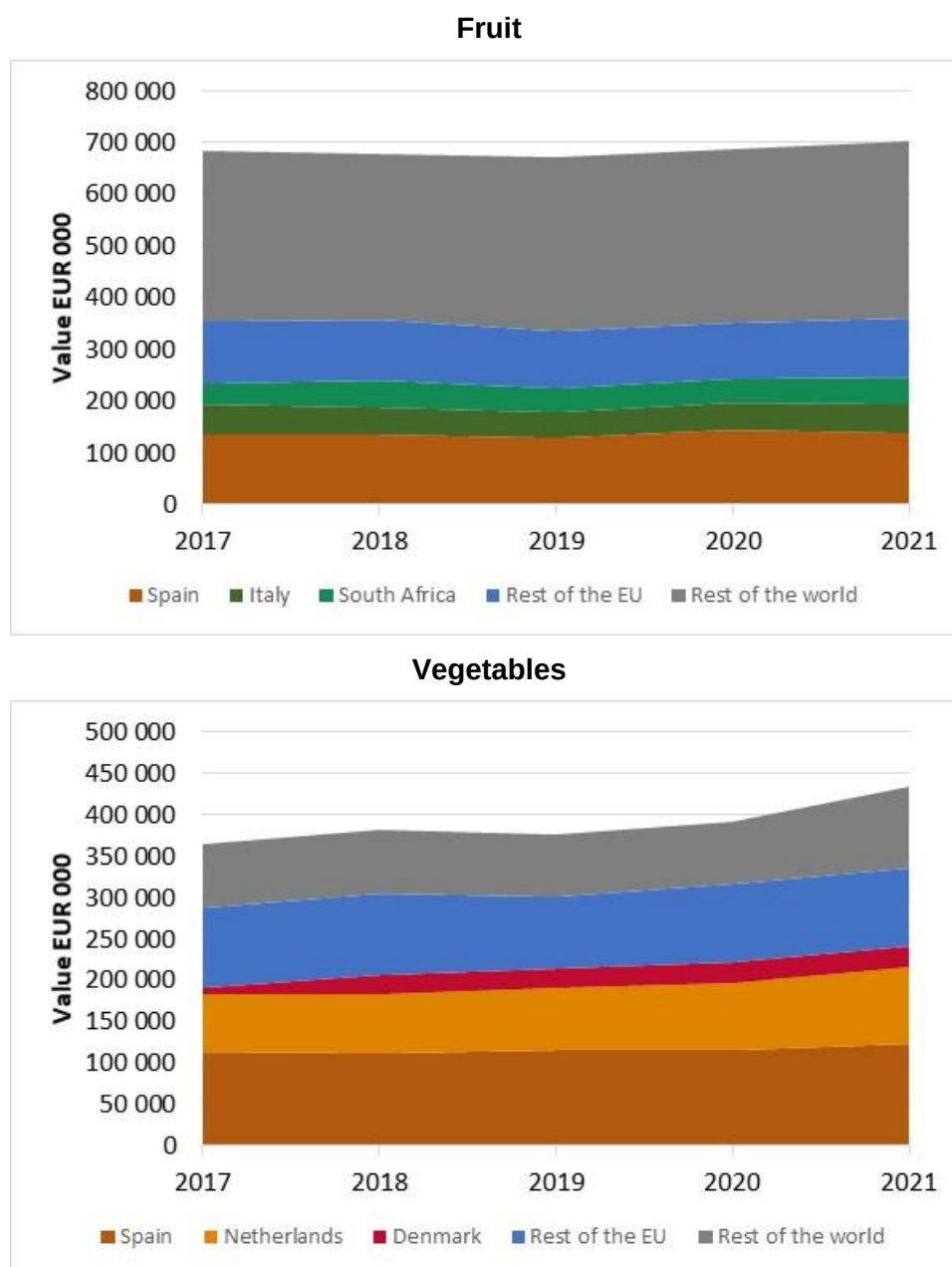
Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Note: names for CN codes are abbreviated in most cases.

Only indicated CN codes are presented in these figures. 6 codes for fruit and 7 codes for vegetables are missing, which is why individual figures do not add up to totals in previous graphs.

In terms of origin, Spain is the largest exporter of fruit to Norway, followed by Italy and South Africa. Other large EU exporters of fruit to Norway include the Netherlands and Poland. The EU accounts for around 40% of all fruit imported by Norway, with other countries such as South Africa, Peru and the US being amongst the largest non-EU exporters. Spain is also the largest exporter of vegetables to Norway followed by The Netherlands and Denmark. The EU accounts for around 70% of vegetable exports to Norway, with large non-EU exporters of vegetables including the UK, Morocco and Israel.

Figure 5-9: Norwegian imports of fruit and vegetables by country, 2017-21 (000 EUR)



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 07 and 08.

EU GI products

As noted in section 4.2.4, there is legislation for registering GIs in Norway. No GIs for fresh fruit or vegetables have been identified as having been registered.

Main competitors

Fruit is a much more competitive market for EU products in Norway, with Norway also importing a large volume and variety of fruit from South Africa, Peru and the US. South Africa and Peru benefit from seasonal differences from EU producers coupled with both countries having a trade agreement in place with Norway. EU exports account for around 40% of all fruit imported by Norway which still gives them a solid position in the Norwegian market. The EU has a large 70% share of vegetable exports to Norway, with the UK and Morocco being the biggest competitors in this market.

5.2.4 Specific market entry requirements

Market Access and Entry

In terms of tariffs, these vary depending on the type of fruit or vegetable and often also the season. For example, certain fruit such as citrus oranges are not subject to a tariff (not produced in Norway) while strawberries are subject to a tariff of around EUR 0.79 per kg (which varies by season). It's best to consult access2market of the EU commission to obtain precise tariff data based on your product of concern; a link to this website can be found in the blue box below.

In terms of notable documents required to export, standard procedures such as registering with the European Trade Control and Experts System (TRACES) and informing the Norwegian food authority are required.

Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:

Main page – select product, country of origin and destination country:

<https://trade.ec.europa.eu/access-to-markets/en/home>

Example link – tomatoes (0702) from Spain to Norway

<https://trade.ec.europa.eu/access-to-markets/en/search?product=0702&origin=ES&destination=NO>

Standards, SPS measures; labelling

Regulations about requirements, prohibited substances not allowed for use in these products, quality requirements etc. are mostly the same as in the EU due to effort to harmonised Norwegian food safety requirements with EU legislation. It is the responsibility of the importer that the imported foodstuff is safe for human consumption and that the labelling and the content comply with Norwegian food regulations. The products must be labelled in Norwegian or in a language that resembles Norwegian (Swedish or Danish are the only generally accepted alternatives). Norway has joined the keyhole labelling scheme. The Keyhole label (Nøkkelhullet) is a voluntary Nordic label for food which has been used in all Nordic countries. In Norway, the Directorate of

Health and the Norwegian Food Safety Authority are responsible for this labelling scheme, this label is commonly found on fruit and vegetable products in the country.

5.2.5 Distribution

Modern grocery channels, led by supermarkets are the most popular channel for the retail of fresh fruit and vegetable products. Due to Norway's large structural shortage of fruit and vegetables, it is common to find imported products for sale in these outlets. Farmers' markets are fairly popular channels though generally they only offer locally-produced fruit and vegetables; and furthermore may be seasonal in nature. That said, certain markets with imported products may be found e.g. around Christmas. Some consumers choose to source their produce from local farmers through a subscription model known as *Andelslandbruk* (community-supported agriculture). This model is growing in popularity in Norway. Finally, online grocery channels are increasing in popularity and it is common to find imported products for sale through them.

5.2.6 Challenges for EU products

The main challenges of entering the Norwegian fruit market include competition from third countries such as South Africa and Peru which are both large exporters in the market. South Africa predominantly exports grapes, citrus fruits and dates while Peru predominantly exports dates, strawberries and grapes which makes these products in particular competitive in the Norwegian market. Norwegians are increasing their consumption of fruit but are also seeking to expand production by increasingly utilising greenhouses within the south of the country which is also the case for vegetables. The vegetable market is less competitive for EU products; while Norway does produce a noticeable volume of potatoes, carrots and onions, it is still largely reliant on imports from abroad to satisfy domestic demand. Seasonality is a big driver of the market and indeed it provides notable opportunities when domestic supply during seasons is also taken into account.

Market Takeaway: Fresh fruit and vegetables

Consumption: Consumption of fruit and vegetables of all varieties except pineapples is expected to record positive growth between 2022 and 2026, reflecting the growth in demand for fruit and vegetables across the entire consumer base in Norway.

Competition: Peru and South Africa are the biggest competitors in exports of fruit to Norway, but exports from non-EU countries collectively account for 60% of total fruit imports by Norway resulting in competition from a variety of countries. The exportation of vegetables is much less competitive with 70% of vegetables imported by Norway coming from the EU.

Distribution: modern retailers / supermarkets dominant. Increasing interest in some retail channels which support local farming, such as farmers markets and community-supported agriculture.

Challenges: Competing with South African and Peruvian grapes, citrus fruits and figs is the larger challenge of the Norwegian fruit market, particularly considering that both countries have an existing trade agreement with Norway. There is a small rise in domestic production with the encouragement of the government, although this is unlikely to significantly impact imports of EU fruit and vegetables in the short term.

Opportunities: Growing domestic demand for fruit and vegetables of virtually all varieties coupled with the rising tide of health consciousness post-COVID-19 creates good prospects for EU fruit and vegetable products. There is also a reduced tariff for certain vegetables exported from the EU to Norway during the winter months for products such as carrots and potatoes.

5.3 Dairy

5.3.1 SWOT analysis

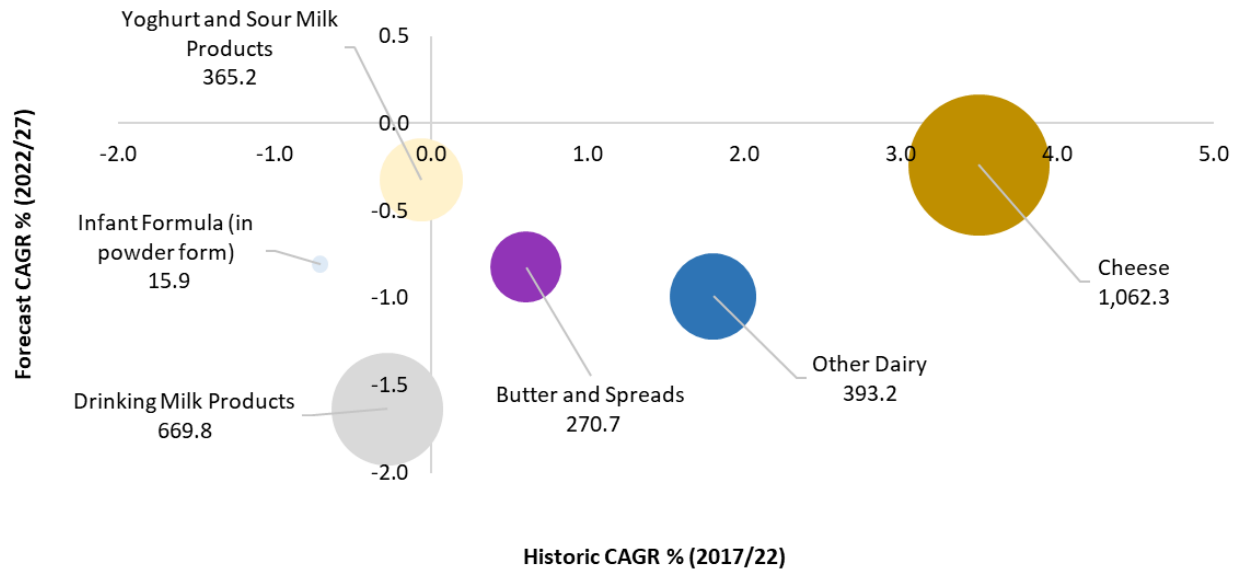
STRENGTHS (+)	WEAKNESSES (-)
- Norway is a high-income country with high disposable incomes. - Norway is a strong net importer of dairy. It imports 3.5 times more than it exports (by value). - The EU is dominating the import market. It accounts for nearly all of the import value for most categories including cheese (97%). - Cheese is the strongest import category accounting for around 80% of the dairy import market.	- The consumption of all dairy product categories is forecast to decline. - The plant-based trend is growing in Norway, albeit from a very small base. - Consumers are increasingly health conscious, which negatively affects sales of products such as cream, flavoured yoghurt and milk, dairy based desserts, margarine, etc. - Norway is a net exporter of whey/natural milk constituents, and unsweetened and unconcentrated milk/cream.
OPPORTUNITIES (+)	THREATS (-)
- Cheese offers opportunities because it is the largest category by far and is forecast to decline at the lowest rate of all categories. - The interest in premium cheeses from the EU is growing because they are interesting and viewed to be more cosmopolitan. - Healthy and premium products gain popularity such as e.g. butter (healthy fat), plain yoghurt, sugar-free products etc. - Artisanal products are highly valued. - The e-commerce channel, although currently niche, is growing and thus offers new opportunities for EU exporters to sell their products online.	- The Norwegian dairy market is highly dominated by domestic companies such as Tine and Q-Meieriene. - The UK is the main non-EU exporter of dairy to Norway and even though it does not account for much of the market remains a competitor. - The ongoing inflation might further negatively impact the dairy market as consumers are likely to spend less on dairy products. - Even though artisanal production is small it is highly valued and thus is a threat to artisanal EU producers.

5.3.2 Consumption

Evolution of consumption

Figure 5-10 below shows the various retail values for dairy products in Norway. The dairy market had a size of EUR 2.78 billion in 2022. Cheese is the largest dairy product, with a market value of EUR 1.06 billion. Cheese grew by a CAGR of 3.5% between 2017 and 2022, but the market is expected to decline to -0.2% per year between 2022 and 2027. Drinking milk products is the second-largest market with a retail value of EUR 670 million, but this market is forecast to decline even more than cheese between 2022 and 2027, at a CAGR of -1.6%. 'Other' dairy products are valued at EUR 393 million, while yoghurt and sour milk products are valued at EUR 365 million, butter and spreads at EUR 271 million and finally infant milk formula at EUR 16 million. All dairy products are expected to see declines in retail value between 2022 and 2027.

Figure 5-10: Evolution and forecast of the dairy market in Norway, 2017-2027; retail value (EUR million)



Source: Euromonitor International: Packaged Food, 2022.

Consumers

Consumers from all parts of society and all regions consume dairy products in Norway. As there are various dairy products present and consumed in Norway, more specific consumer profiles can best be described by subcategory of products:

- **Milk:** The consumption of cow's milk is common in Norway. Younger consumers have slowly been adapting to the consumption of milk alternative products, in line with a wider desire for animal welfare and healthier drink options. Children are the main consumer group of flavoured milk drinks such as chocolate milk.
- **Cheese:** Cheese is a common part of the Norwegian diet. Everyone regardless of gender, age, or income class consumes cheese in the country. However, in particular, younger consumers, who are interested in animal welfare and healthier food options increasingly make the switch to plant-based cheese. Consumers of imported cheese from the EU are more likely to be higher-income adults, given that the most popular EU cheeses are unprocessed ones without a domestic equivalent, such as brie, mozzarella, Manchego and feta.
- **Yoghurt:** Yoghurt is also commonly consumed in Norway by all parts of society. Plain yoghurt and dairy-free alternatives are particularly popular with health-conscious consumers, whereas less health-conscious consumers enjoy flavoured yoghurt because of their good taste. In particular, children prefer flavoured yoghurts.
- **Butter and spreads:** Generally, these products are consumed by all parts of society, genders, income and age groups as they are a staple in the Norwegian diet. Consumers of butter are more likely to have middle to higher incomes and / or a higher health-consciousness, whereas spreads appeal to lower income consumers and vegans as they only purchase vegan spreads and no butter. Consumers of butter and spreads are also more likely to value home cooking.

- **Other dairy:** The other dairy product category appeals to consumers of coffee and other food and beverages which incorporate cream, or sweet desserts.

Drivers and method of consumption

Drivers of dairy consumption in general that stand out are the demand for healthy and sustainable products and the desire for quick and convenient food products. A further breakdown of drivers and methods of consumption by dairy subcategories is shown below.

- **Milk:** Milk products have been negatively affected by consumers going back to their regular lifestyles after the COVID-19 pandemic. Consumers spend more time outside of their homes, which means they have fewer breakfasts at home and they cook less often. As milk is often consumed at breakfast such as together with cornflakes, as well as in cooking and baking it is negatively affected by this change. Flavoured milk in small packs on the other hand is mainly consumed on-the-go or by children at school. Another factor negatively driving milk consumption in Norway is the increased demand for plant-based alternatives. Consumers drink less milk because it is viewed to be less healthy and to have higher environmental impacts.
- **Cheese:** The demand for cheese in Norway is declining because of the resuming cross-border grocery shopping after the COVID-19 pandemic. Norwegian consumers prefer to purchase cheese at cheaper prices in nearby countries (mainly Sweden). Moreover, with consumers going on holidays during the summer again, cheese purchases drop during the summer months. People are going back to their busy lifestyles and spend less time at home cooking or baking with cheese. Although more consumers consume cheese via the foodservice industry than during COVID-19 times, this channel will need more time to fully recover. This might take a while as consumers currently keep working from home once in a while. In general, cheese is consumed throughout the day. It is eaten for breakfast, lunch, dinner or as a snack. It can be a savoury or sweet meal. Norway is popular for its *brunost* (brown cheese), which has a distinctively sweet, caramel and sometimes nearly chocolaty taste. It typically is eaten with bread and a bit of fruit jam. The “regular” Norwegian cheese is yellow cheese, which is a staple in Norwegian households. It also is consumed with crackers but also used for cooking many different Norwegian dishes. As cheese is mainly sold in blocks, cheese slicers are common.²⁰
- **Yoghurt:** Consumers are going back to cross-border grocery shopping because it is cheaper to purchase yoghurt in e.g. Sweden, which negatively affects demand for yoghurt in Norway. As Norwegians also travel more again, less yoghurt is sold during the summer months. Norwegian consumers return to their pre-COVID-19 pandemic lifestyle, which means they are spending less time at home. As yoghurt is often consumed for breakfast at home this is another factor negatively affecting demand. However, yoghurt is also eaten as a snack during the day, or as a dessert after lunch or dinner. It can also be used in cooking. On-the-go formats, on the other hand, drive demand as they are easy to consume during a busy day in the office for example.
- **Butter and spreads:** As in the case of the other dairy categories, butter and spreads also have been negatively impacted by the opening of the borders after the COVID-19 pandemic as some Norwegian consumers prefer to purchase these products in cheaper places such as Sweden. Moreover, consumers go on vacation again which negatively impacts sales during the summer. During the COVID-19 pandemic, consumers have been

²⁰ Norwegian cheese, <https://www.lifeinnorway.net/norwegian-cheese/>

baking and cooking at home a lot. Now people spend less time at home, which also negatively impacts the demand for butter and spreads for baking and cooking. Moreover, these products are used as spreads to add to bread, but as people eat fewer at home breakfasts this is another negative impact. Consumers' increasing health consciousness also negatively affects sales of butter and spreads, however, as butter is viewed to be healthier than spreads it has some stability in demand. Butter is also driven positively because even though consumers want to eat less, they want to eat better which increases the value of sales.

- **Other dairy:** Even though products from this category such as dairy desserts and quark are common impulse products, the category still suffers due to the opening of the borders, as some consumers prefer to purchase these products across the border (mainly in Sweden) where they are cheaper. Cream, fromage frais and quark also see a decline because the baking and cooking trend that boomed during the COVID-19 pandemic is coming to an end. Some products are also commonly consumed in coffee, tea or other beverages. Health and convenience are key drivers of demand and thus plant-based products and on-the-go snacking options are positive drivers.

Purchase criteria

In line with the general situation for dairy in Norway, price, quality, type, taste and healthiness are frequent considerations for consumers of dairy products. Looking more specifically on a product-by-product basis:

- **Milk:** The type of milk is one of the main purchase criteria for Norwegian consumers. Most consumers choose semi-skimmed milk, followed by full-fat milk and then fat-free milk. The popularity of fat free milk is increasing because it is viewed as the healthiest milk option. Regarding semi-skimmed milk, consumers are likely to opt for variants fortified with vitamin D. Thus, consumers choose the type of milk often according to what they perceive as healthy. Cow's milk is by far the most popular choice, however, the demand for plant-based milk alternatives is increasing. Another reason for full fat milk to gain popularity is its taste, which by some is perceived to be better than lower fat variants. Even though the price is important for consumers especially in times of inflation, they often prefer to pay a bit more for higher quality products. Value for money is important. Nonetheless, some low-income consumers might pay more attention to the price than to quality or freshness.
- **Cheese:** The price is an important purchase criterion as, depending on the type, cheese can get very expensive. Not all consumers are willing to pay high prices for cheese, although most of them appreciate high-quality products and are generally willing to pay a bit more for it. The type of cheese plays a role as well, as different consumers have different taste preferences. Hard cheeses, mainly yellow cheeses and brown cheeses are chosen by most consumers, with the cube/block format preferred to grated. This is followed by soft cheeses, such as mozzarella, brie, feta, and blue cheese, and then by spreadable cheeses, mainly cream cheeses. Consumers' curiosity and awareness increases the popularity of imported varieties, in particular soft cheeses. Regarding imported cheese, Norwegian consumers most often choose fresh types such as mozzarella and ricotta, grated cheese, spreadable cheese, and feta or feta-like variants. Consumers of imported cheeses are likely to pay attention to the country of origin, and in some cases, GI status and/or brand, as well as obviously the cheese type. Against this background, some imported cheeses bear the flag of their country of origin to assist with easy identification. Spreadable cheeses are chosen more often because of the novelty in the field as well as because they are practical e.g. as a sandwich spread during lunch at

the office. However, the cheese category is losing consumers because in particular health-conscious consumers switch to dairy-free cheese products.

- **Yoghurt:** As with most other dairy products the price plays a role; however, Norwegian consumers generally value quality more than a cheap price point and thus are willing to pay more, if their budget allows it. One of the main purchase criteria is the type of yoghurt, which is chosen according to taste preferences and use (e.g. eating with muesli or plain). Flavoured yoghurt is by far the most common choice of consumers, with flavours such as vanilla, strawberry, raspberry, blueberry and banana being the most popular. Health-conscious consumers in particular usually opt for plain yoghurt as these products do not contain added sugar or sweeteners and can be used for cooking. Drinking yoghurt is currently chosen the least. The packaging plays a role as well. Consumers looking for yoghurt for at-home consumption are likely to purchase larger packs, whereas consumers needing yoghurt for on-the-go look for small and easy-to-eat options. The design can play a role too, such as products geared towards children. Squeezable pouches are a popular choice when buying yoghurt for children.
- **Butter and spreads:** Norwegian consumers want value for money. The price is important but so is the quality of a product. With increasing inflation, the price might become increasingly important to lower income consumers whereas higher income consumers continue to be likely to purchase high quality products. The most commonly chosen products by volume are margarine and spreads, followed by butter and then cooking fats. Butter is the primary choice of health-conscious and higher income consumers.
- **Other dairy:** The price is an important purchase criterion for other dairy products but so is quality. Consumers want to get the best value for their money and are likely to spend a bit more if that means the products they purchase will be of better quality. This category includes very different products, which means one important criterion is the use. Most consumers purchase cream, followed by fromage frais and quark, and shelf stable or chilled dairy desserts. Convenience is important to consumers, which is why they would for example choose fromage frais and quark, packaged in a way so they can be consumed immediately.

Dairy products on retailers' shelves in Norway

In terms of pricing:

- Cheese retail prices generally start at NOK 40 (EUR 3.65) per 250g, though in a few cases, cheaper products can be found. Mid-range products sell from NOK 60 (EUR 5.50) per 250g and premium products can sell for well in excess of NOK 100 (EUR 9.10).
- Butter prices tend to be around NOK 50 (EUR 4.55) per 500g at the lower end, with higher end products (e.g. high quality organic products) twice this price or more.

Promotional offers of the “buy X get Y” nature can be found for some dairy products, but more typically these are used for yoghurt and milk rather than cheese or butter.



Above and below: imported cheeses in two different retailers. Packs generally smaller in size (under 250g) and plastic packaging is most common.



Typical packaging sizes for cheese are in the 100 to 250g range (with 100g and 250g being two of the more common sizes). Smaller packaging sizes are rare; larger ones can be found for consumers buying in bulk (e.g. in discounters). Plastic containers are most common though in a few cases folding cartons can be found.

Butter is most commonly sold in 250g or 500g packs; though some other sizes such as 400g can also be found. While foil paper is common, plenty of spreadable butter or butter-hybrid products are offered in plastic containers. While it is increasingly common to find ethical / organic labels on various dairy products, this trend is particularly noticeable for butter.



Above and below: pack sizes in discounters often are larger.



Photos © Euromonitor International / Agra CEAS, 2023

Recent market trends

The most popular trends on the market per category are set out below:

- Milk:** Innovations play an important role for manufacturers wishing to increase or keep their market share. The leading player in the milk market, Tine SA, remained strong because of its innovations in favoured milk as they introduced drinks enriched with protein to the market. This works well also because of the health trend. Norwegian consumers increasingly demand healthy food and thus are interested in value-added products. However, the health trend also drives consumers to switch to plant-based alternatives.

Brands such as *Alpro* and *Oatly* release many new drinks as well. Another trend is for smaller, convenience packaging. As consumers go back to their busy lifestyles the demand for smaller packs that can be consumed on the go is increasing. In particular flavoured milk is consumed on the go. The e-commerce channel is growing in importance and is likely to offer more opportunities for manufacturers now and in the future.

- **Cheese:** Imported cheese is trending. The largest cheese manufacturer Tine for example aims to increase its portfolio of “speciality cheese” to keep up with the trend. Private labels continue to gain shares in cheese, particularly in hard cheese, along with increasingly premium private label offerings. An example is REMA 1000, a large Norwegian discounter that partnered with dairy producer Synnøve Finden to introduce its own brand of cheese. Soft cheese and spreadable cheese keep their popularity. Spreadable cheese because of innovations and limited editions such as seen with Kavli cheddar and chilli. Soft cheese remains popular because of the growing interest in imported cheese. Moreover, due to the health and animal welfare trend, plant-based cheese alternatives are trending as well, although they still have a small base. E-commerce is forecast to grow at the fastest pace of all distribution channels.
- **Yoghurt:** Smaller size formats of yoghurts are currently trending because people go back to their on-the-go lifestyle. Many developments and preferences are based on the natural food and sustainability trend, as well as on the health trend. Greek yoghurt for example stands out as one of the main growing markets. Tine for example introduced natural Greek yoghurt in squeezable pouches that are sugar free. This new product utilised all the above mentioned trends. Synnøve Finden also launched a Greek style yoghurt series, which is high in protein, low in fat, lactose-free and has added probiotics. More and more manufacturers introduce free-from and value-added yoghurt products. Plain yoghurt is gaining popularity as well due to the health trend and because it can also be used for cooking. Organic yoghurts as well as private label products due to their more affordable prices are gaining momentum as well. Even though plant-based yoghurt remains a niche, its market is growing fast because of the health and animal welfare trend. The popularity of e-commerce is growing at a high rate as well.
- **Butter and spreads:** The number of private label products in margarine and spreads is increasing, including those that are dairy-free. For example, Norgesgruppen’s *Eldorado* brand launched products that are dairy free and high in omega-3 and healthy fats. The market for dairy-free spreads is forecast to grow because of the plant-based, health and wellness trends. Organic products are trending as well. The e-commerce channel is growing fast and might offer more opportunities in the future.
- **Other dairy:** Convenient and immediate options are increasing due to the health and convenience trends. Products low in fat as well as organic products are key products in the market. Protein puddings stand out in chilled and shelf stable desserts as they are sweet, but permissible indulgence due to their protein added-value. Plant-based products such as plant-based protein puddings are trending as well. The market for plant-based other dairy products is forecast to continue to grow.

5.3.3 Offer

Domestic production

Compared to the 1980s, Norway’s dairy cow population declined from nearly 400 000 to around 215 000 head. This decline reflects lower domestic demand for milk, as well as gains in productivity. In the 1980s per capita consumption of milk in Norway was close to 180 litres, whereas today it is below 90 litres. Even though the cow population declined, the milk yield per

cow has been increasing in Norway since approximately 2000. As a result, the country's total milk production has been quite stable at around 1 500 million litres. The average cow herd size increased during the years as well. Whereas it was around 12 cows per herd in the 1980s, it is around 30 cows per herd today. However, this means even today Norwegian cow herds are very small compared to other countries in the EU.²¹ Overall, milk production in the country is relatively small, one reason being the limited availability of grassland for cows.

As the overall milk production is quite small and stable, so is the domestic cheese production. The most popular Norwegian cheeses are Jarlsberg, which is a mild, nutty and lightly sweet yellow cheese, and brown cheese, which is rather sweet with a caramel note. Artisanal production of cheese is very demanded in Norway. Norwegian cheese is of high quality as the country's cheeses have won several important prizes such as the World Cheese Award in 2016 (won by *Kraftkar*).²²

There are some strong domestic players in the dairy market in Norway. Tine SA is strongly dominating, as it is leading the milk, cheese, yoghurt and other dairy subcategories and ranking third in butter and spreads. The company is Norway's biggest producer, distributor and exporter of dairy products with 11 400 members and 9 000 cooperative farms.²³ Q-Meieriene AS ranks second overall and more specifically in milk, yoghurt, and other dairy. The company's portfolio includes for example Kefir, Skyr, yoghurt, chocolate milk, whipped cream, sour cream and crème fraîche.²⁴ Synnøve Finden AS ranks second in the cheese market and third in yoghurt. Arla Foods AS ranks third in cheese and Mills DA, and Fjordland AS first and second in butter and spreads. Considering all categories, the Norwegian market is dominated by domestic companies.

Imports and exports

Norway is an important net importer of dairy, particularly cheese, despite its local production of different dairy products. The country imported around EUR 163 million worth of dairy products in 2021, whereas it exported close to EUR 46 million in 2021. This means Norway imported 3.5 times more dairy products than it exported by value (Figure 5-11). Cheese imports to Norway account for close to 80% of the whole dairy net import market value, with yoghurts being the second most important category. Even though Norway is a net importer overall and the following categories are very small, it is a net exporter in the whey/natural milk constituents, and milk/cream unsweetened and unconcentrated categories.

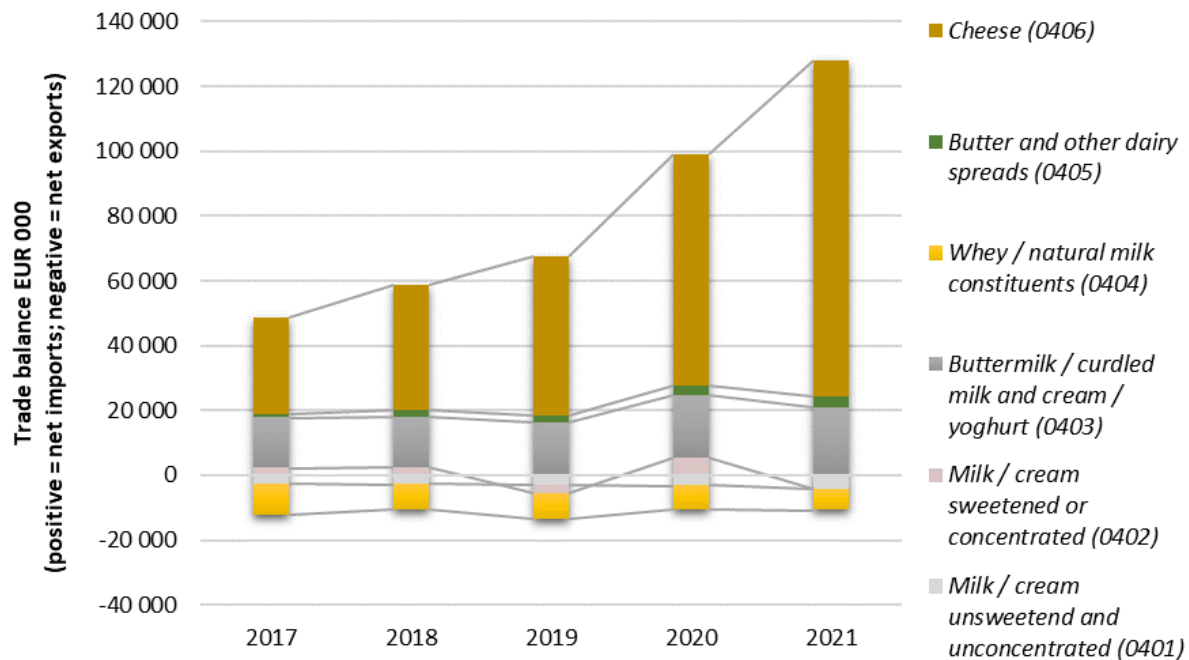
²¹Nine facts about Norwegian agriculture, <https://www.nibio.no/en/news/nine-facts-about-norwegian-agriculture#:~:text=Since%202000%2C%20milk%20yields%20per,1989%20to%2027.8%20in%202018>.

²² A Trip Through Norway's Burgeoning Cheese Scene, <https://culturecheesemag.com/travel/a-trip-through-norways-burgeoning-cheese-scene/>

²³ About Tine, <https://www.tine.no/english>

²⁴ Product categories, <https://www.q-meieriene.no/produkter>

Figure 5-11: Trade balance (imports and exports) of dairy in Norway, 2017-21 (EUR 000)



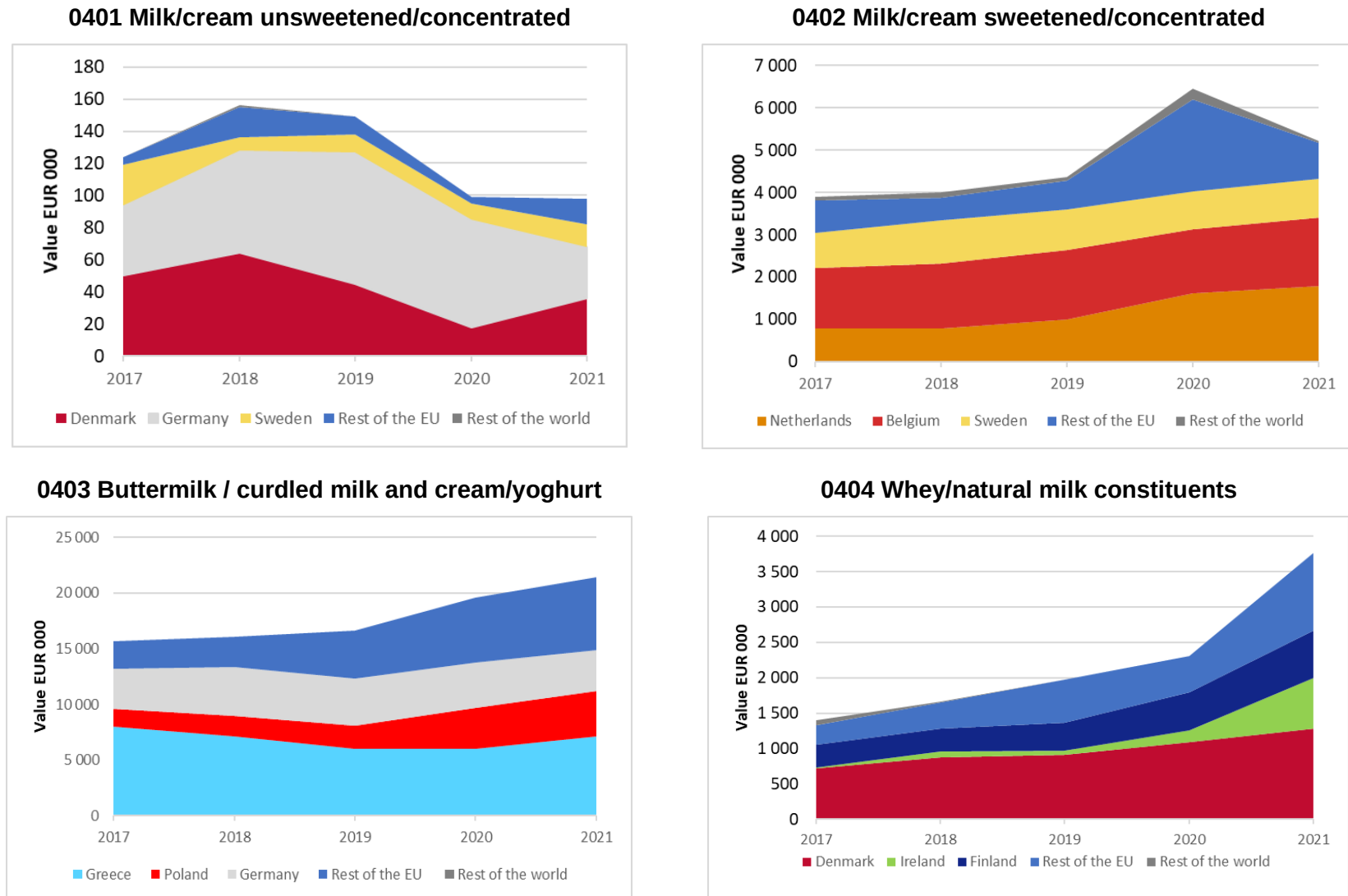
Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

CN codes in brackets.

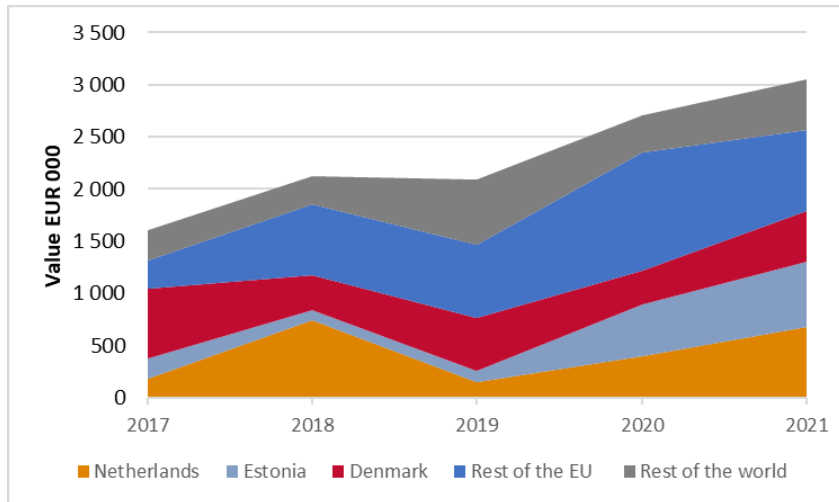
In terms of the origins of imports, the EU clearly dominates the market. The UK is the main important non-EU exporter of dairy to Norway in multiple categories. More specifically, as shown in Figure 5-12:

- **Sweetened/concentrated milk/cream:** The main exporters are the Netherlands, Belgium and Sweden. All the top ten exporters are from the EU. In total, the EU accounts for over 99% of the import market value in Norway.
- **Unsweetened/unconcentrated milk/cream:** The main exporters are Denmark, Germany and Sweden. Currently, all exporters are from the EU, which means the EU accounts for 100% of the import market value.
- **Buttermilk, curdled milk and yoghurt:** The main exporters are Greece, Poland and Germany. All the top ten exporters are from the EU. In total, the EU accounts for over 99% of the import market value.
- **Whey and natural milk constituents:** The main exporters are Denmark, Ireland and Finland. All the top ten exporters are from the EU. In total, the EU accounts for over 99% of the import market value in Norway.
- **Butter/dairy spreads:** The main exporters are the Netherlands, Estonia and Denmark. Nine out of the top ten exporters are from the EU. In total, the EU accounts for around 84% of the import market value in Norway. The main non-EU exporter is the UK.
- **Cheese:** The main exporters are Denmark, Italy and France. Nine out of the top ten exporters are from the EU. In total, the EU accounts for over 97% of the import market value in Norway. The main non-EU exporter is the UK.

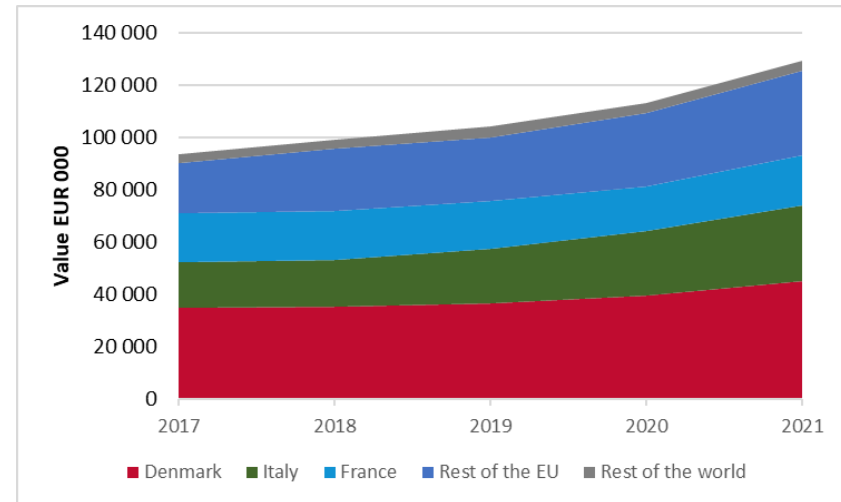
Figure 5-12: Norwegian imports of different dairy categories by country, 2017-21 (EUR 000)



0405 Butter/dairy spreads/



0406 Cheese



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

CN codes are indicated above graphs.

EU GI products

As noted in section 4.2.4, Norway does not participate in the EU GI registration system for agricultural products and foodstuffs, as agriculture is not included in the EEA Agreement. As a result, registration is required in the national GI system of Norway, which is called Beskyttede betegnelser. Gorgonzola and Parmigiano Reggiano are protected GI in the Norwegian system.

Main competitors

By far the main competition comes from domestic companies that dominate the market. Tine SA and Q-Meieri AS are the biggest competitors. They are followed by other domestic and international companies such as Synnøve Finden AS, Arla Foods AS, Mills DA, and Fjordland AS.

The EU is nearly the sole exporter of most dairy product categories, which means competition in the import market is very limited. However, the UK is the largest non-EU exporter to Norway (particularly of butter/dairy spreads and cheese).

Competition also comes from plant-based producers of alternatives to dairy products, as these products grow in popularity.

5.3.4 Specific market entry requirements

Market access and custom procedures

Preferential trade with the EU and Norway is ruled by article 19 of the EEA Agreement. The Norwegian food and veterinary legislation is harmonised with the EU, and import requirements are generally also the same as in the EU. However, the EEA Agreement does not cover the EU common agriculture and fisheries policies or direct and indirect taxation.

In addition to the general documentation requirements that are listed in Table 4-1 certain additional documents are needed. These include a notification to deal in agricultural goods, a registration of importers with the Norwegian food safety authority (Mattilsynet) as well as a registration with the European Trade Control and Expert System (TRACES). In addition, a common health entry document for products, and a veterinary health certificate for animal products are required. Most documents can be in English or Norwegian.

Even though Norway is a member of EFTA tariffs and quotas exist. Tariffs are variable. Tariffs for 0401 range between 388% and 443% which is the same as the MFN. Tariffs for 0402 are between NOK 22.87 per kg and NOK 23.99 per kg which is the same as the MFN as well. 0403 for natural yoghurt are the same as the MFN at NOK 8.45 per kg. Most tariffs for the other subcategories are below the MFN some at 0% but mainly between NOK 3.1 per kg and NOK 20.54 per kg. For 0404 tariffs are at NOK 16.41 per kg, which is on par with the MFN. For 0405 tariffs are the same as MFN at NOK 25.19 per kg. For 0406 products a 0% rate is applicable within a tariff quota of 8 400 tonnes. Above this the normal duty rate is NOK 28.24 per kg which is the same as the MFN.

One major barrier relating to the trade of agricultural goods from the EU to Norway affecting dairy products stands out. EU export possibilities in processed agricultural products to Norway remain significantly impacted by high custom tariffs based on the EEA Agreement. This impacts the trade of products such as buttermilk and margarine.

Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:

Main page – select product, country of origin and destination country:

<https://trade.ec.europa.eu/access-to-markets/en/home>

Example link – general cheese category (0406) from France to Norway

<https://trade.ec.europa.eu/access-to-markets/en/search?product=0406&origin=FR&destination=NO>

SPS measures

There are currently no specific SPS related challenges concerning dairy products. More information can be found in section 4.3.4.

Standards

As a member of the EEA, Norway conforms with EU Regulation 178/2002 (General Food Law), which is the harmonized regulation setting out the general principles and requirements of the EU's harmonized food law. More information can be found in section 4.2.2.

Labelling

The EU's legislation on general labelling and nutritional labelling is applied in Norway. EU requirements regarding food labelling are laid out in the FIC Regulation (EC) 1169/2011. Labels must be either in Norwegian, Swedish, Danish and sometimes Finnish language. More information on labelling can be found in section 4.2.3.

5.3.5 Distribution

Offline retail accounts for 98.9% of sales, whereas online retail accounts for 1.1%. Online retail increased by 0.8% between 2017 and 2021 but is forecast to continue to grow at a faster pace. Discounters remain by far the most used channel with 45.9% of sales, followed by supermarkets with 38.7%, and convenience retail with close to 9.2% as shown below in Figure 5-13. Between 2017 and 2021 retail sales of discounters grew, whereas those for supermarkets and convenience retail decreased. Convenience retail is forecast to gain retail shares again because people are going back to their busy lifestyles after the COVID-19 pandemic.

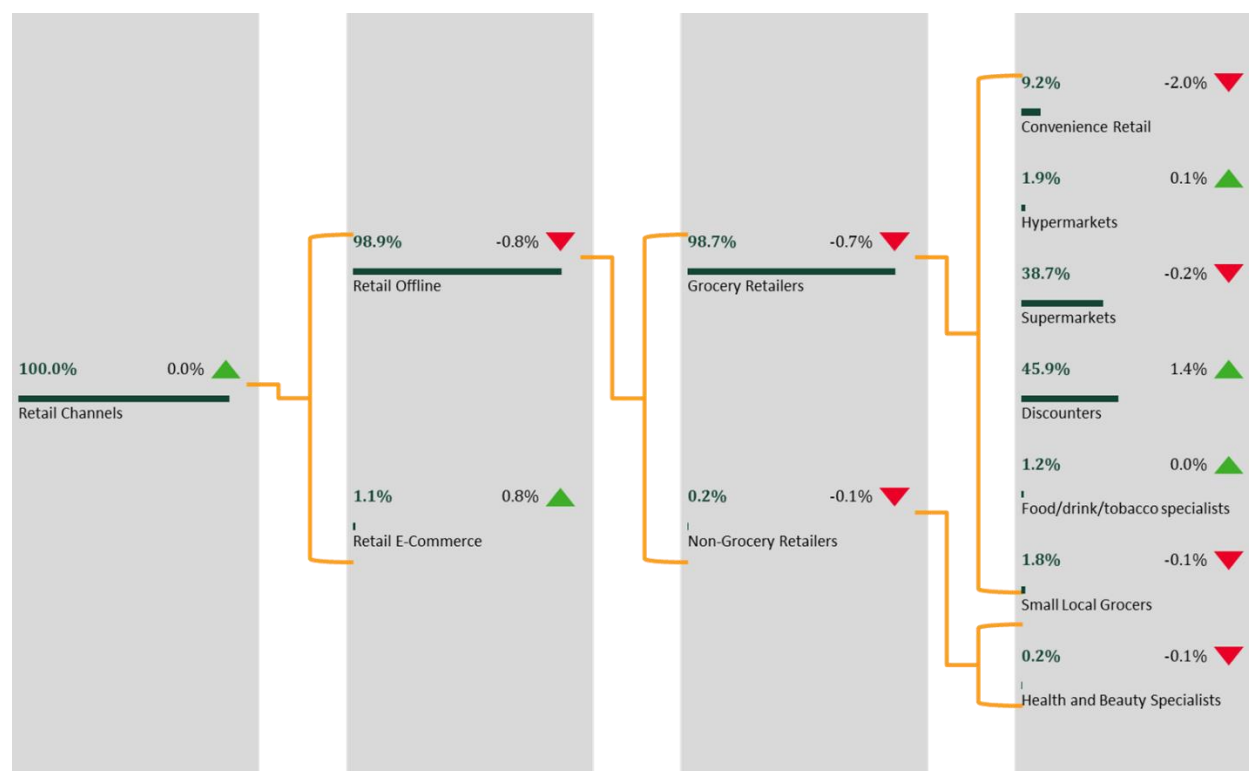
However, this overarching picture for dairy masks significant differences between products, based on their shelf stability/chilling requirements and the consumers who purchase the product (which is impacted by the former factor). More specifically:

- **Milk:** Offline retail accounts for 98.7% of sales, while e-commerce accounts for 1.3% of sales. Even though e-commerce remains a niche it is growing at a faster pace. The largest online grocery retailers in Norway are Oda and Norgesgruppen, which offer the same milk products as brick-and-mortar stores. The most popular offline retail channels are discounters with 49%, followed by supermarkets with 37%, and convenience stores with 11%. Convenience retail is forecast to grow in popularity. The channel is likely to offer more flavoured milk drinks than supermarkets etc. The foodservice sales are recovering

from the COVID-19 pandemic but are likely to stay below pre-pandemic levels as consumers continue to partly work from home.

- **Cheese:** Offline retail accounts for 98.7% of sales, whereas online retail accounts for 1.3%. Online retail is forecast to continue to grow at a fast pace. However, discounters remain by far the most used channel with 46% of sales, followed by supermarkets with 40%, and convenience retail with close to 8%.
- **Yoghurt:** Offline retail accounts for 98.8% of sales, whereas online retail accounts for 1.2%. Online retail is forecast to continue to grow at a fast pace. The largest brick-and-mortar grocery retailers usually carry similar products as online stores. However, discounters remain by far the most used channel with 42% of sales, followed by supermarkets with 38%, and convenience retail with over 13%. Convenience store retail is forecast to increase its shares.
- **Butter and spreads:** Offline retail accounts for 98.7% of sales, whereas online retail accounts for 1.3%. Online retail is forecast to continue to grow at a fast pace. The largest brick-and-mortar grocery retailers usually carry similar products as online stores. However, supermarkets remain by far the most used channel with 49% of sales, followed by discounters with 41%, and convenience retail with over 5%. Convenience store retail is forecast to increase its shares.
- **Other dairy:** Offline retail accounts for 98.8% of sales, whereas online retail accounts for 1.2%. Discounters remain by far the most used channel with 47% of sales, followed by supermarkets with 30%, and convenience retail with close to 11%.

Figure 5-13: Distribution channel overview of dairy in Norway (2021); all dairy products; retail value share (%)



Source: Euromonitor International: Packaged Food, 2022.

5.3.6 Challenges for EU products

The dairy market in Norway offers good opportunities for the EU. However, the market is dominated by domestic companies Tine and Q-Meieriene. Other domestic companies as well as some international companies are important competitors as well. The EU already dominates imports into Norway, but one constraint for EU exporters is that the Norwegian dairy market is limited in size and rather small compared to EU standards. Moreover, inflation is negatively affecting the ability of lower income consumers to purchase premium dairy products such as expensive premium cheeses. Lastly, consumers' interest in health, wellbeing and sustainability is challenging for certain product groups such as cream, flavoured yoghurts and milk drinks. In line with these trends, the demand for dairy alternative products is challenging as well. However, these trends can also be utilised as opportunities.

Market Takeaway: Dairy

Consumption: The dairy market had a size of EUR 2.78 billion in 2022. Cheese is the largest dairy product by retail value, with a market value of EUR 1.06 billion. This is followed by drinking milk, other dairy, yoghurt, butter and spreads. All categories are forecast to decline.

Competition: Domestic production by Tine and Q-Meieriene is the biggest competition. Other domestic and international companies are competitors as well. The EU dominates dairy imports by far, and the main non-EU competitor is the UK.

Distribution: Largely distributed through offline retail such as through discounters and supermarkets. Convenience retail is forecast to grow. E-commerce remains niche across all dairy product categories, but is forecast to grow at a faster pace.

Challenges: Due to inflation the ability of lower income consumers is negatively affected. Consumers' interest in health, wellbeing and sustainability is challenging for certain product groups, and so is the trend for alternative plant-based products.

Opportunities: Cheese is the largest category by value, and although it is forecast to decline this is at a very low rate. Imported cheese accounts for over 80% of all dairy imports by value and is increasing in demand. Premium and healthy dairy products in general such as e.g. butter (healthy fat), plain yoghurt, sugar-free products etc. present significant opportunities, as is the growing e-commerce channel.

5.4 Wine

5.4.1 SWOT analysis

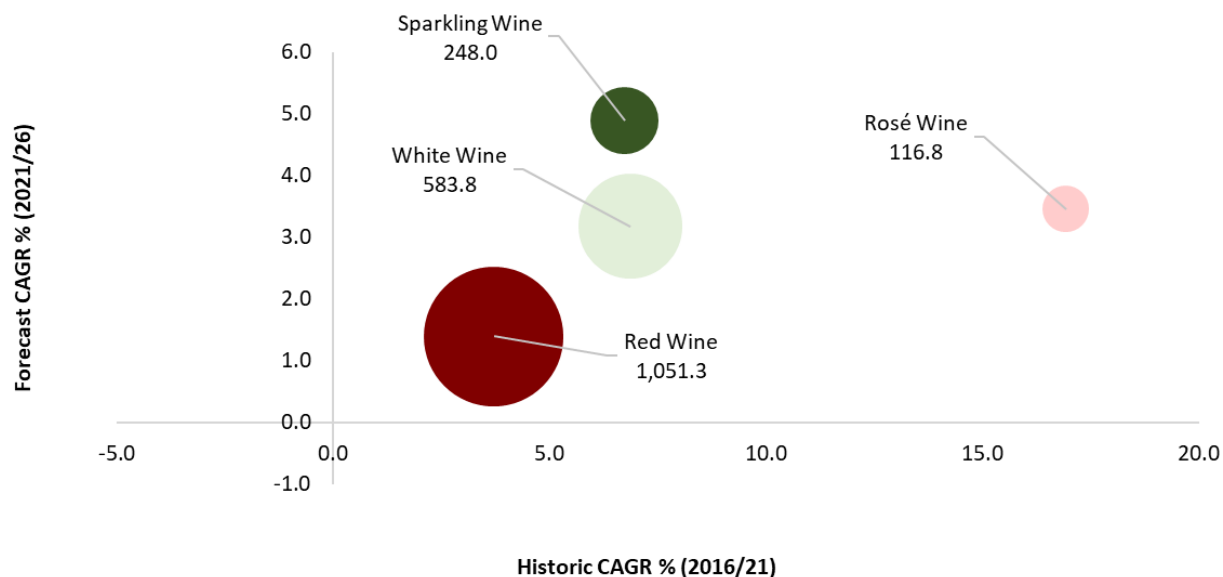
STRENGTHS (+)	WEAKNESSES (-)
▪ The market has been growing in recent years and is forecast to continue to grow. ▪ Norway is a large net importer of wine, with imports having grown steadily during the last few years. ▪ EU exports in total account for about 85% of the total import market value. The main EU exporters are France, Italy and Germany. ▪ High alcohol taxes negatively influence strong alcoholic drinks which push consumers to lower alcohol drinks such as wine.	▪ The forecasted growth rates are lower than in previous years, which means the market will grow slower. ▪ Norway's wine culture does not have a long history and is relatively new. The country's alcohol consumption is comparatively low, and focuses on traditional 'old world' wine. ▪ Retail monopoly <i>Vinmonopolet</i> is the only distributor for wine and typically sources through tenders with strict criteria. ▪ Interest in online sales and low/no alcohol wine is growing but from a small base. ▪ The ban on wine advertising makes marketing more complicated.
OPPORTUNITIES (+)	THREATS (-)
▪ Red wine stands out because it is by far the biggest market. Rosé wine moves away from seasonal consumption to being consumed all year round. Sparkling wine is forecast to grow in popularity as well. ▪ Health-conscious products that are sustainably produced such as organic, biodynamic, sugar-free, artisanal wine. ▪ Bag-in-box packaging is highly popular due to its convenience and cheaper prices. ▪ On-trade offers opportunities outside those provided by <i>Vinmonopolet</i>, and in particular may be of interest for smaller volumes.	▪ Non-EU major wine exporting countries such as the US, Chile and Australia are the main threat. ▪ A handful of companies dominate the market in specific wine segments: Arcus-Gruppen AS, Solera Beverage Group, and Viña Concha y Toro SA (still light grape wine), Moët Hennessy Norge (Champagne), Ruggeri & C Srl (other sparkling wine). ▪ With continuous climate change, increasing knowledge, and resistant varieties Norway's wine production might increase in the future.

5.4.2 Consumption

Evolution of consumption

In 2021 the total wine market in Norway was worth close to EUR 2 billion. As shown in Figure 5-14, red wine is leading the market with nearly half of the total market size. In 2021, the red wine market was worth about EUR 1.05 billion. This was followed by white wine with close to EUR 584 million, sparkling wine which accounted for approximately EUR 248 million, and rosé wine with close to EUR 117 million. Historically, between 2016 and 2021, the markets for all wine categories were growing. Rosé wine had by far the highest CAGR of about 16.9% followed by white wine at 6.9%, sparkling wine at 6.7% and red wine at 3.7%. The markets of all wine categories are forecast to continue to grow between 2021 and 2026, although at a slower pace. The sparkling wine market is forecast to grow at the fastest pace of all categories, at about 4.9%. Rosé wine is forecast to grow at about 3.5%, followed by white wine at 3.2% and red wine at 1.4%.

Figure 5-14: Evolution and forecast of the wine market in Norway, 2016-2026; total value (million Euro)



Source: Euromonitor International: Alcoholic Drinks, 2022.

Consumers

Even though Norwegian consumers traditionally preferred beer and spirits, their wine consumption has increased and is now equal. Norwegian consumers consume less alcohol overall, compared to their Scandinavian neighbours such as Denmark and Sweden. Overall, Norwegian men tend to drink more wine than women – about twice as much by volume. Wine becomes increasingly popular amongst the younger generation. Young urban consumers are for example interested in natural and artisanal wines as well as juicy red wines.²⁵ Overall, younger consumers drink a greater volume of wine than older ones, though older consumers somewhat paradoxically drink wine more frequently. Indeed, the baby boomer generation (those born between 1946 and 1964) make up just under half of regular wine drinkers. This means there is effectively a division between the old consumer group, who drinks wine more frequently, and the younger generation, which drinks it more rarely but in greater overall volumes.

Many Norwegian consumers are open-minded to trying new varieties, however, this group often is not willing to pay premium prices (rather mid-range prices, i.e. up to around NOK 200 per bottle) as they cannot be sure they will like a product. This group of open-minded consumers is more likely to be young (most notably from the Millennial age group). Educated wine drinkers on the other hand are likely to pay for premium wines as they know which wines they like. Around 20% of consumers are price-conscious and prefer to purchase lower-priced wines, with convenience being essential for them. Finally, around 10% of wine consumers can be considered “collectors” who are very educated in wine and food, and willing to pay for quality imported wines.

²⁵ The Norwegian Wine Consumer w/ Trond Erling Pettersen, Vinmonopolet (2022), <https://www.xchateau.com/the-norwegian-wine-consumer-w-trond-erling-pettersen-vinmonopolet/>

Drivers and method of consumption

The COVID-19 pandemic and related restrictions boosted the wine market. As consumers spent more time at home many got interested in wine. During the COVID-19 pandemic, the only option to purchase wine was *Vinmonopolet* (often just called *polet*), the government owned alcoholic beverage retailer and the only company allowed to sell wine in Norway. However, as borders reopened, consumers went back to purchasing wine abroad such as in Sweden because it is more affordable.

Alcohol taxes in Norway are comparatively high, but wine sales are impacted less than spirit drinks, because taxes are dependent on the alcohol content, which means they drive up the price of spirits the most. The higher prices of spirits might drive some people to switch to wine as it tends to be cheaper due to the difference in taxation.

As wine is relatively new to Norway, the country's wine culture is also relatively new. For example, it was not common for Norwegian consumers to drink alcoholic drinks during the week but rather on weekends. However, this has changed during the last few years. Norwegians enjoy travelling and exploring new cultures. Their open mindedness and interest increased their acceptance of a wine culture which allows having a glass of wine during a weekday evening as well. French rosé wine, for example, increased in popularity after a direct flight connection between Oslo and Nice was introduced some years ago.

The wine sector sees large seasonal impacts. For example, red wine is more commonly consumed during the colder winter months, whereas white and rosé wine is preferred during the warmer summer months as people prefer refreshing drinks. However, the consumption of rosé wine is increasing as this wine starts to be consumed year-round.

The restaurant culture in Norway is not very strong, due also to the high cost of dining out, which is why consumers mostly purchase wine at *Vinmonopolet* for at home consumption. Consumers like to enjoy some glasses of wine with their friends before they go out during the weekend. These “pre-parties” are common because wine in clubs and bars is more expensive than from the monopoly. Nevertheless, the number of wine bars increased prior to the COVID-19 pandemic and is likely to continue to do so now. Wine bars can be found in all major Norwegian cities such as Oslo, Bergen, Stavanger and Trondheim. There is a lot of knowledgeable staff working in these bars, as around 100 Norwegian sommeliers complete their degrees each year.

Wine is moreover commonly served at special events and during festivities such as weddings, birthdays, or Christmas. It is sometimes also given as a gift when invited to a dinner party.²⁶

Purchase criteria

Price is an important purchase criterion as wine can get quite expensive and prices are rising further due to ongoing inflation. Price-sensitive consumers pay significant attention to the price, whereas higher-income and knowledgeable consumers may pay premium prices for premium products.

Quality is important as well, in particular to knowledgeable consumers but also to the general consumer who is looking to get the best value for money.

²⁶ Norway's wine landscape, <https://www.wine-business-international.com/wine/general/norways-wine-landscape>

Seasonality is another important factor and so is the type of wine. Red wine is mainly chosen during colder weather, whereas white wine and rosé are more popular when it is warmer. Overall, red wine remains the main wine category chosen by the majority of consumers, followed by white wine, and rosé wine. One reason for this is that Norwegian consumers are fairly traditional regarding their wine preferences, with most of them preferring classic old-world wines. Most notably, Italy, Spain and France are popular origins for red and sparkling wines; while Germany, France and Italy are well-regarded origins of white wines. However, this is changing, and consumers are increasingly curious to try new world wines. This is reflected in consumer taste preferences as they now increasingly prefer lighter, fruitier styles of wines. Nonetheless, it should be noted that French wines have done particularly well of late, with both premium and affordable brands benefitting.

The packaging and design of wine bottles also can be decision factors. Bag-in-box formats that contain large quantities of wine are highly popular because of their value for money, being usually cheaper than bottled wine. However, also higher-end producers start to offer bag-in-box options to suit the Norwegian market such as Chablis, Sancerre, and Piedmont Nebbiolo. Other consumers also enjoy lightweight bottles because of their environmental impact and practicality as it is easy to bring them to summer cabins or on boats.

Wine on retailers' shelves in Norway

As both previously and subsequently noted, *Vinmonopolet* is the only store which can sell alcoholic beverage with over 4.75% alcohol content, such as wine. As result of this, the range of wines on offer in these stores is quite extensive.



Above: outside a Vinmonopolet store. Below: just a fraction of the inside of a store.

In terms of pricing, wine is anyhow expensive in Norway due to high taxation, but there is also a willingness to pay more for premium products and a slight skew towards the mid-higher end.

- Economy products tend to retail for up to NOK 150 (EUR 13.70) per 750ml bottle.
- Mid range products generally fall in the range of NOK 150 to 400 (EUR 13.70 to 36.50) per 750ml.
- Premium products start from NOK 400 (EUR 36.50) per 750ml.



Wines are organised by colour and by origin. Most commonly the more expensive products are placed at the eye level, with the cheaper ones at the stoop level. However, cases may also be placed at the stoop level in some instances. Each product has an indication on the shelf as to the origin, grape variety and tasting notes.



Above: part of the Italian and French sections for red wine; with innovation in bottle shape seen in the Italian section. Below: example of shelf labelling.



In terms of packaging, while 750ml glass bottles are the most readily available product, the popularity of bag-in-box wines should not be neglected. They gained a lot of popularity during the Covid-19 pandemic in response to restrictions on movement and a desire to bulk-buy; and their popularity has remained. In the bottled segment, there is increasing focus on bottle design and shape.

Furthermore, it should be noted that *Vinomonopole*t has requirements for the eco-friendliness of wine products which retail at under NOK 150 per 750ml, with refunds charged on the containers of these products (whether light glass, plastic or aluminium) and the bottles returnable. Products above this price can also use the eco-friendly deposit scheme and indeed some organic products choose to in order to align with their image of sustainability.

Photos © Euromonitor International / Agra CEAS 2023.

Recent market trends

The following recent market trends can be observed:

- **Rosé wine:** One of the main trends in Norway is the growing market for rosé wine. Even though consumers still mainly drink rosé wine during the summer as it is viewed to be refreshing, it becomes common to drink it all year around.
- **Sparkling wine:** Sparkling wine, in particular from the US and the UK, is increasing in demand. Other sparkling wine, such as Prosecco, Cava and Crémant is forecast to grow in demand.
- **Bag-in-box packaging:** Bag-in-box wines have been trending in Norway for many years. Norway is one of the main countries in which bag-in-box offerings are popular. These offerings are cheaper than bottled wines and more convenient for some consumers as they do not have to go to *Vinmonopole*t as often when they purchase in bulk. In the past,

the wine selection for bag-in-box wines has tended to be for lower quality wines. Nevertheless, now an increasing number of manufacturers offer their higher quality products in these large packs as well.

- **Increasing health and sustainability consciousness:** Norwegian consumers' health consciousness as well as their demand for sustainably sourced and produced wine is very high compared to other nations. These trends increase the demand for organic, biodynamic, vegan, sugar-free, artisanal, and low/no alcohol wine. The markets for these specific products are likely to grow but from a low base. Most notably, *Vinmonopolet* has started to indicate the sugar content of wines it sells on shelf labelling; and this is leading to a shift among red wines away from heavier, higher sugar content wines (such as some Italian ones) towards lighter, fresher wine styles. Indeed, some producers are working to improve the knowledge and perception of their wine based on this shift (e.g. some wines using the Garancha variety). Sustainable packaging e.g. in pouches is growing in popularity as well.
- **The use of trend setters for promotion:** As it is forbidden to use marketing practices to increase the sales of wine, other solutions need to be found to promote one's product. Journalists and wine experts can have a large impact on sales. Wine enthusiasts may follow international wine journalists or people, in general, might follow national or local Norwegian newspapers. In their reports, journalists might recommend specific wines, which can increase their popularity.²⁷

5.4.3 Offer

Domestic production

Due to Norway's geographic location, the country's viticulture is tiny with just 50 000 vines spread across 10 hectares. France for example produces wine worth about EUR 28 billion per year, whereas Norway, Sweden and Denmark together only produce around EUR 14 million²⁸. However, due to climate change and the existence of cold resistant varieties, there are around a dozen wine producing companies located in Norway. The main grape varieties used are Solaris, Rondo and Vidal. Norwegian wine is currently not comparable to the quality of historic wines from European viticulture. Also, with its cold but sunny summers, there is potential for sparkling and white wines. The main challenge for growers is the frost in late spring and early autumn.²⁹

The wine market is dominated by international companies that import wine into Norway. Arcus-Gruppen AS has a market share of close to 15% and thus is the market leader in still light grape wine. The company is Norway's largest wholesaler and trader of wine and liquor, created when it was demerged from the state-owned wine and liquor retailer *Vinmonopolet* in 1996 (which has since only kept the retailing operations). The Nordic Solera Beverage Group ranks second with close to 5% and Chile's Viña Concha y Toro SA third with over 4%. Moët Hennessy Norge is leading the Champagne market, followed by Haugen-Gruppen AS, and Nafstad AS. The other

²⁷ The Norwegian Wine Consumer w/ Trond Erling Pettersen, *Vinmonopolet* (2022), <https://www.xchateau.com/the-norwegian-wine-consumer-w-trond-erling-pettersen-vinmonopolet/>

²⁸ Is the future of wine in Norway? (2021). <https://www.gamberorossointernational.com/news/wine-news/is-the-future-of-wine-in-norway/>

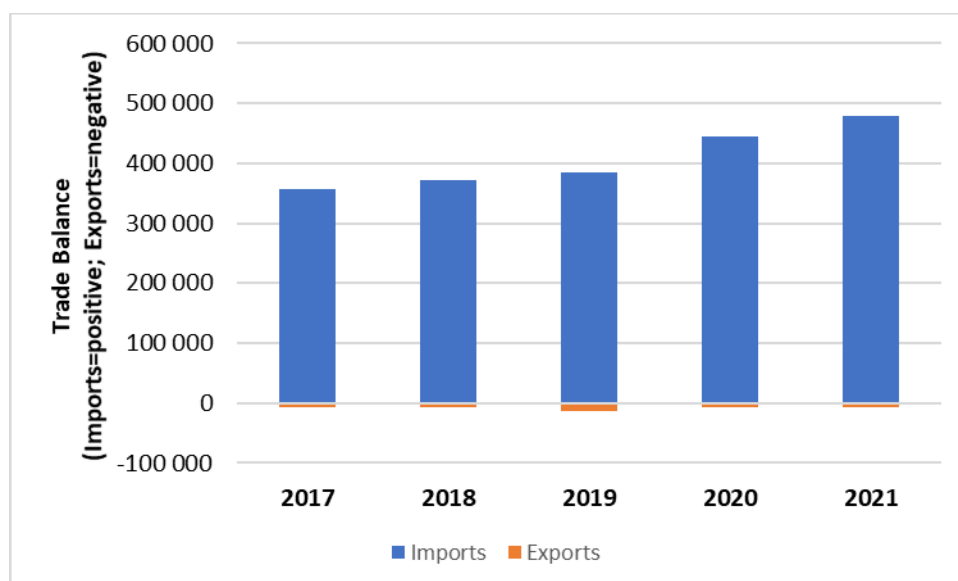
²⁹ Norway, the northernmost vineyard, <https://www.wine-explorers.net/en/travelog/norway-the-northernmost-vineyard#:~:text=Global%20warming%2C%20resistant%20grape%20varieties,mot%20northern%20in%20the%20world!>

sparkling wine category is led by Ruggeri & C Srl, followed by Andre Delorme SA, and Cantina Vini Armani A Srl.

Imports and exports

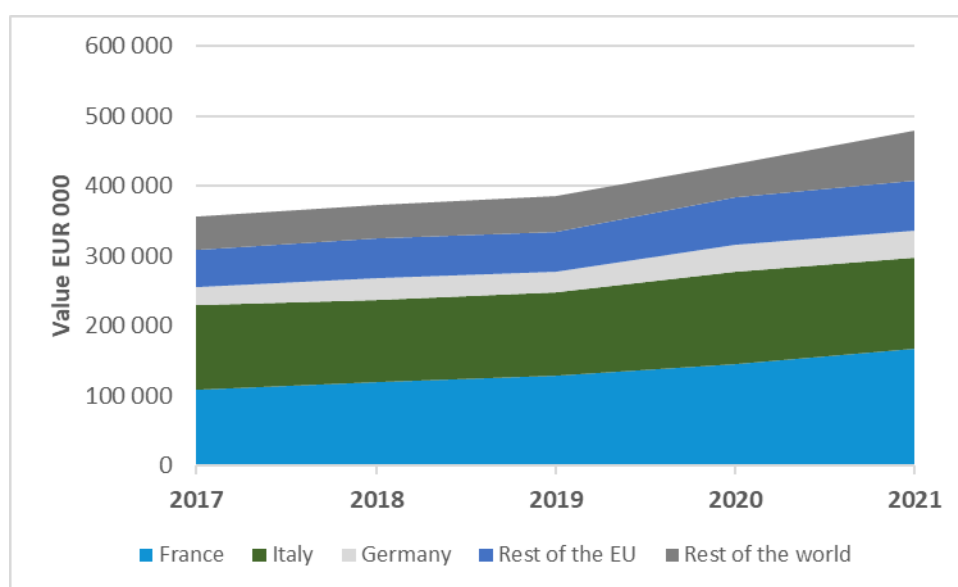
Given the country's limited domestic production, Norway is a substantial net importer of wine as shown in Figure 5-15. In 2021 the country imported wine worth about EUR 480 million, whereas it exported only about EUR 7 million in the same year. This means that in 2021 Norway imported over 68 times more wine than it exported to the world. Imports increased year on year between 2017 and 2021. The value of Norway's wine exports over the same period is negligible and fluctuates strongly year on year.

In 2021, France was the main exporter of wine to Norway, followed by Italy and Germany (Figure 5-16). France exported wine worth about EUR 166 million, followed by Italy, with approximately EUR 132 million. Germany's exports in 2021 were much lower at around EUR 39 million. In total, six out of the most successful ten exporters of wine to Norway are from the EU including Spain, Portugal and Austria. EU exports in total accounted for about 85% of the total market value in 2021. The main non-EU exporters are the US, Chile, and Australia.

Figure 5-15: Trade balance (imports and exports) of wine in Norway, 2017-21 (EUR 000)

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 2204.

Figure 5-16: Norwegian imports of wine by country, 2017-21 (EUR 000)

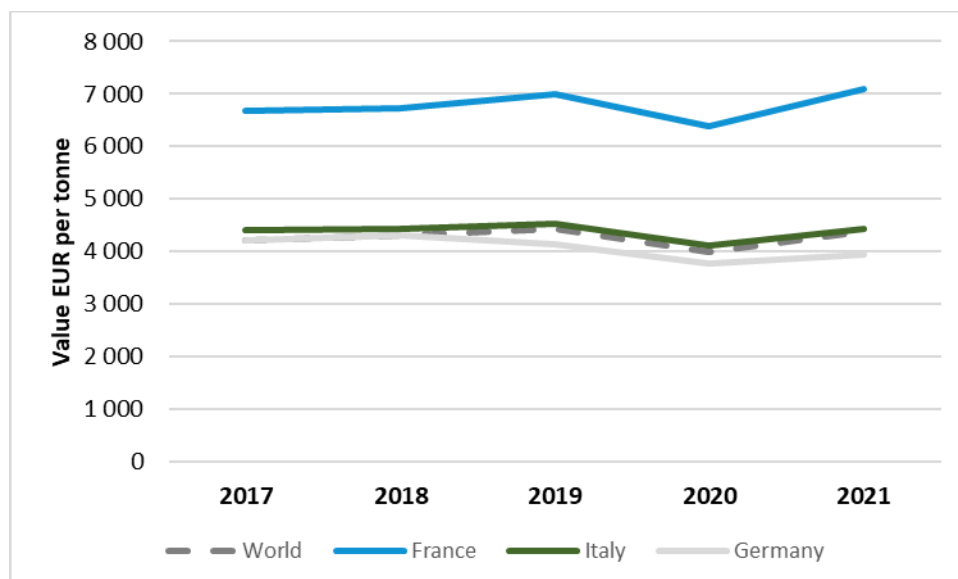
Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 2204.

The world average unit value of wine exports to Norway was around EUR 4 370 per tonne in 2021 as depicted in Figure 5-17. It increased between 2017 and 2019, decreased in 2020, and started to increase again in 2021. The unit value of the largest exporter, which is France, was close to 40% higher than the world average in 2021, at EUR 7 100 per tonne. The unit values of Italian and German wine are much closer to the world average. Italian wine had a unit value slightly

above the world average at EUR 4 420 per tonne, whereas German wine was just below the world average at EUR 3 930 per tonne.

Figure 5-17: Norwegian imports of wine by country, 2017-21; value (EUR per tonne)



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 2204.

EU GI products

As noted in section 4.2.4, Norway does not participate in the EU GI registration system for agricultural products and foodstuffs, as agriculture is not included in the EEA Agreement. However, EU wines GIs are protected as the protection of GIs for EU wine and spirit names is included in the EEA agreement.

Main competitors

Domestic production is negligible, so the main competitors are other exporting countries. Although the EU clearly dominates Norwegian imports of wine, some non-EU exporters are important competitors. The main non-EU exporters are the US, Chile, and Australia.

In the still light grape wine market Arcus-Gruppen AS, Solera Beverage Group, and Viña Concha y Toro SA are the main competitors. Arcus-Gruppen AS is a wine training company and even though it does not own wine brands, some of the traded wine is bottled domestically. Moët Hennessy Norge is the main competitor in the Champagne market and Ruggeri & C Srl is the main competitor in other sparkling wine.

5.4.4 Specific market entry requirements

Market access and custom procedures

Preferential trade with the EU and Norway is ruled by article 19 of the EEA Agreement. The Norwegian food legislation is harmonised with the EU, and import requirements are generally also the same as in the EU.

In addition to the general documentation requirements that are listed in Table 4-1 certain extra documents are needed. These include a notification to deal in agricultural goods and a registration of importers with the Norwegian food safety authority (Mattilsynet). Most documents can be in English or Norwegian.

Tariffs for wine are 0%, which is the same as the MFN.

Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:

Main page – select product, country of origin and destination country:

<https://trade.ec.europa.eu/access-to-markets/en/home>

Example link – wine (2204) from France to Norway

<https://trade.ec.europa.eu/access-to-markets/en/search?product=2204&origin=FR&destination=NO>

Standards

As a member of the EEA, Norway conforms with EU Regulation 178/2002 (General Food Law), which is the harmonized regulation setting out the general principles and requirements of the EU's harmonized food law. More information can be found in section 4.2.2.

Labelling

The EU's legislation on general labelling and nutritional labelling is applied in Norway. EU requirements regarding food labelling are laid out in the FIC Regulation (EC) 1169/2011. Labels must be either in Norwegian, Swedish, Danish and sometimes Finnish language. The FIC regulation states that a list of ingredients is not mandatory for alcoholic beverages containing more than 1.2% of alcohol by volume. However, the name and address of the producer and the bottling facility need to be displayed, as well as the min % ethyl alcohol by volume, the bottling date, the mass concentration of sugars (except for dry wines), the expiration date if alcohol content is under 10%, the classification based on sugar content, and the year of harvest. More information on labelling can be found in section 4.2.3.

5.4.5 Distribution

Approximately 93% of wine by volume in Norway was sold off-trade and the remaining 7% was sold on-trade in 2021. Between 2016 and 2021 off-trade sales increased whereas on-trade sales decreased, which is mainly reflecting the restaurant and bar closures in the last couple of years due to Covid19. With the reopening of the service sector, on-trade sales are forecast to recover. Figure 5-18 shows the off-trade distribution channels. In 2021, 98.2% of wine by volume was sold in store-based retailing, and the remaining 1.8% was sold via e-commerce. Between 2017 and 2021 the e-commerce channel grew by 0.6%, and this channel is forecast to continue to grow.

Vinmonopolet (the Wine Monopoly) is the only shop in which alcoholic beverages containing above 4.75% alcohol (including wine) can be purchased in Norway. *Vinmonopolet* is a government owned retailer. Therefore, for wine products to be retailed in Norway they have to be available in *Vinmonopolet* outlets. *Vinmonopolet* has shown itself to be open to stocking the products of smaller producers; though it has been observed that not all product references it sells

are available in all outlets. It is important to note that *Vinmonopolet* typically selects new wines to stock through tenders containing detailed criteria which may include origin, grape variety, taste profiles and price. Samples will have to be provided in response to this and wines which do not meet the criteria will not be considered.

By having this monopoly for alcoholic beverages, the Norwegian government aims to reduce alcohol consumption in the country. Opening hours are limited.

Restaurants that have obtained the needed licenses can buy wine from authorised importers and sell it as well. They are not constrained by the tender process of *Vinmonopolet*, and indeed may specifically look for unique wines in smaller volumes in order to distinguish themselves. Nonetheless, it should be noted that the market is competitive and in some cases suppliers offer discounts to gain or retain interest in products. In general, wine can only be served in restaurants between 8 am and 1 am, however, local authorities can extend these times.³⁰

Figure 5-18: Distribution channel overview of wine in Norway (2021); off-trade volume



Source: Euromonitor International: Alcoholic Drinks, 2022.

5.4.6 Challenges for EU products

The Norwegian market is small compared to European standards. Moreover, Norwegian consumers are encouraged by the state to consume less alcohol. Overall alcohol consumption has been decreasing, however, the wine market by value has been increasing in recent years and is forecast to continue this way.

³⁰ Domestic Alcohol Policy in Norway – Vinmonopolet, <https://www.concealedwines.com/business-opportunities-scandinavia-wine-producers/domestic-alcohol-policy-norway-vinmonopolet/>

Norway operates a monopoly (*Vinmonopolet*) for the retail sale of wine to consumers. During the COVID-19 pandemic, due to border closures and the closure of the service sector, the only option for Norwegian consumers to purchase and consume wine was at the country's monopoly. Now that borders are open again, many consumers actually purchase their wine for instance in Sweden as it is cheaper than in Norway.

It might be challenging that the only distributor for wine is *Vinmonopolet*, although e-commerce is increasing and this may offer new opportunities. Consumers also have the possibility to order specific wines online from *Vinmonopolet's* complete list of offerings and then pick it up at their local shop. However, in order for an exporter's wines to be present in *Vinmonopolet*, they need to work with a Norwegian wholesaler registered with the Norwegian Directorate of Customs and Excise, with selection of imports occurring through tenders of *Vinmonopolet*. It identifies specific needs and put out a tender, calling for wine samples that meet the listed criteria. The detailed criteria can be very specific and elaborative, ranging from a particular origin and grape to packaging, taste profiles and price, and wines that do not meet the requirements set in the tenders will be disqualified. Furthermore, no instore advertising or promotion is allowed by *Vinmonopolet*, so it is difficult to create awareness of new product launches. While the on-trade channel is competitive, importers selling to restaurants can bypass the *Vinmonopolet* tenders, and so offer an interesting alternative option.

Inflation is a challenge in particular for price-conscious consumers as they have less disposable income to purchase wine. This might be a challenge for premium wine from the EU.

Currently, the EU is the main exporter of wine to Norway. However, consumers are getting increasingly interested in new world wine so this might pose a challenge in the future. The main competitors are the US, Chile and Australia.

Another challenge might be the growing health and sustainability consciousness of consumers that makes them pay more attention to how wines are produced and packaged and what ingredients have been used. However, this challenge can also provide an opportunity.

Market Takeaway: Wine

Consumption: *The wine market was worth around EUR 2 billion (retail value) in 2021, with the markets for red wine and white wine being the biggest. All categories are forecast to grow, although slower than in previous years.*

Competition: *As domestic production is extremely small and negligible, the market is dominated by international companies. EU exports dominate, and the main competition comes from major non-EU wine exporting countries such as the US, Chile, and Australia.*

Distribution: *7% on-trade and 93% through off-trade. Nearly all off-trade distribution is solely via the country's monopoly for alcoholic beverages (Vinmonopolet), with e-commerce still niche.*

Challenges: *Smaller and relatively new market, significant cross border trade across Nordic region, Vinmonopolet (alcoholic beverage monopoly), and inflation affecting premium wines.*

Opportunities: *Red is the biggest category. Rosé and sparkling wine forecast to grow at fastest pace. Bag-in-box packaging popular. Healthy and sustainably sourced and manufactured wines, such as organic, free-trade, sugar-free, are popular.*

5.5 Spirits

5.5.1 SWOT analysis

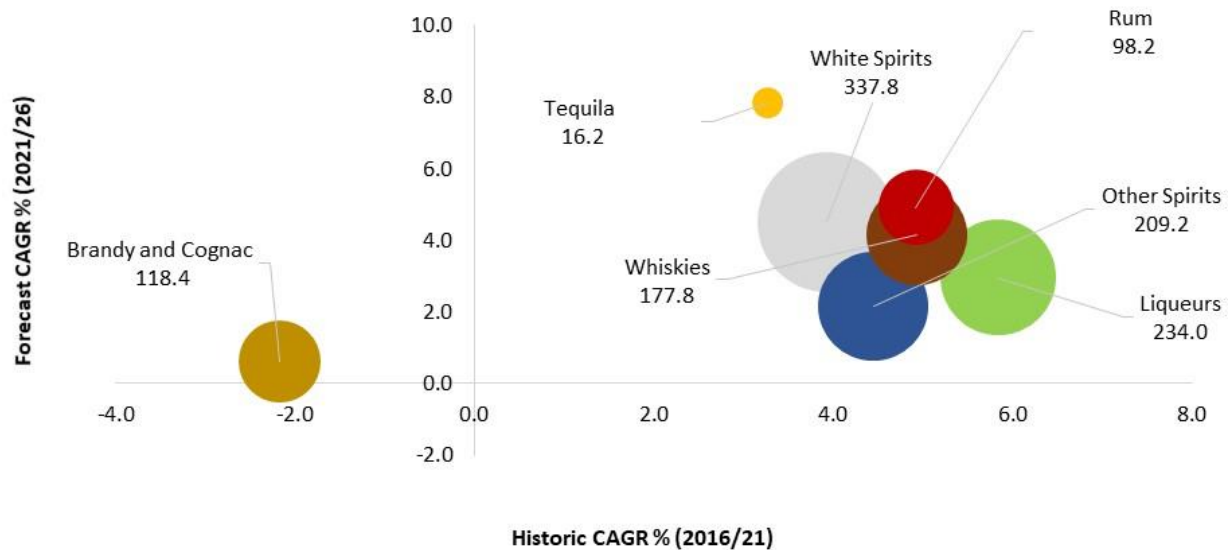
STRENGTHS (+)	WEAKNESSES (-)
- Collectively, the EU is the largest exporter of spirit drinks to Norway. - The re-opening of cross-border trade post-COVID-19 allows for the further exposure of the Norwegian market to EU brands, which are often bought by Norwegian consumers when visiting Sweden and Denmark due to price. - Premium EU brand labels are well-known in the country.	- A complete ban on the advertising of alcoholic drinks in Norway. - All off-trade spirit drinks must be bought by the state-run retailer <i>Vinmonopolet</i> which operates under restricted hours. - Norway applies a heavy alcohol tax on spirits.
OPPORTUNITIES (+)	THREATS (-)
- Re-opening of the on-trade service sector will reduce the reliance on the state-run monopoly retailer <i>Vinmonopolet</i> to obtain spirit drinks. - Imported spirits in particular are often used as a gifting item at Christmas or for a birthday. - Rise in demand for low and no alcoholic variants of spirit drinks in Norway. - Polarisation of the market towards economy and premium brands creates opportunities at both ends of the market; though at the expense of the mid-range.	- In 2009, the Norwegian government removed the monopolistic position of its distillers allowing them to go private for the first time and encouraging domestic producers to expand production. - The UK is the biggest non-EU exporter of spirit drinks (particularly whisky and gin) to Norway. - Rise in demand for exotic spirits which are often not from the EU, but rather from Mexico and Japan.

5.5.2 Consumption

Evolution of consumption

As observed below in Figure 5-19, white spirits are the most popular spirit drink category in Norway with a market value of EUR 337 million. The market for white spirits is forecast to grow at a CAGR of 4.5% between 2022 and 2026, to remain the largest spirit category in Norway. Liqueurs are the second-largest spirit drink category with a market value of EUR 234 million. This category is expected to grow at a CAGR of 3% between 2022 and 2026. Tequila will be the fastest-growing spirit drink product in Norway between 2022 and 2026 at a CAGR of 7.8%, albeit from a market value of EUR 16 million which is the lowest spirit category by value, behind brandy and cognac (EUR 118 million) and rum (EUR 98 million).

Figure 5-19: Evolution and forecast of the spirit drinks market in Norway, 2016-2026; total value, (EUR million)



Source: Euromonitor International: Alcoholic Drinks, 2022.

Consumers

Per capita consumption of spirit drinks in Norway is roughly 7.4 litres, which is lower than neighbouring Sweden (8.9 litres) and Finland (10.8). The consumption of spirits in Norway is heavily restricted, which is common in the Nordic countries (except Denmark). It is actually forbidden to advertise spirits (and all alcoholic beverages) in Norway. Furthermore, all alcoholic beverages with an alcohol content above 4.75% can only be purchased at the state-owned retailer *Vinmonopolet* (often just called *polet*). *Vinmonopolet* only operates during restricted hours such as closing at 6 pm during the weekdays and 4 pm on Saturdays, which prevents Norwegians from purchasing alcoholic beverages in the evenings. Norway also applies a heavy tax on alcoholic beverages which is determined by alcohol content, therefore affecting spirit drinks more than alcoholic beverages with lower alcohol content. This may dissuade lower-income earners from choosing to consume spirit drinks over wine or beer. Consumers are well accustomed to premium imported spirits from the EU although middle-higher income earners are the premier consumers of these products, largely due to price.

Looking at some different types of spirits:

- **Cognacs and brandies** are more likely to be consumed by higher income consumers due to their high price. The same is true of **whisky** to a lesser, extent.
- The **other spirits** category is dominated by **Aquavit**, with the spirit widely consumed in Norway by more or less all over 20s.
- **Vodka**, the most popular spirit drink in Norway is particularly popular among young adults (those in their 20s in particular).

Drivers and method of consumption

Drivers of spirit drinks consumption include the common desires to relax, socialise, experiment, and for gifting. Norwegians commonly consume domestic spirits, such as Akvavit which is an important part of the drinking culture of Norway (and other Nordic countries) and is often drunk during festive gatherings such as a birthday, Christmas or mid-summer. In Norway, Akvavit is commonly consumed at room temperature and is also often accompanied by a beer. Norwegians are notably less fond of chilled spirits when compared to other Northern European countries with the general practice being for spirits to be served at room temperature.

Looking at drivers and method of consumption by types of spirit:

- **Cognac** is typically consumed neat, though some consumers will add a tiny bit of water. Consumption is somewhat higher around Christmas. Indeed, some companies release Christmas editions of cognacs in order to try and take advantage of this trend.
- **Whisky** on the other hand is consumed throughout the year. It has a particular association with celebrations such as birthdays and weddings, and is also commonly consumed after dinner. Most commonly it is consumed neat, often with ice.
- **Akvavit**, a bit like whisky, is commonly consumed after heavy meals and at celebrations – as mentioned above. As it is considered a traditional drink, its consumption is particularly popular at more traditional events. While it is not as strongly associated with Christmas as cognac, it is nonetheless quite popular during this season and as a result, some producers release special xmas editions of the product. Most commonly it is consumed as a straight shot, though it may be used in a cocktail as well.
- **Vodka** is commonly consumed at weekends by younger consumers – either in on-trade channels, or in groups at home before going out. It is consumed both straight and in cocktails.

Purchase criteria

Price is often an important criterion as spirits are expensive in Norway and only available off-trade at certain times of the day. The role of advertising is virtually non-existent as there is a complete ban on alcohol advertising in Norway (although some consumers may be exposed to alcohol advertising when travelling or visiting foreign online websites or shopping platforms). Norwegians will expect the packaging of imported spirits from the EU in particular to be of a high quality, as imported spirits are often gifted during Christmas or for a birthday and cost even more than the already expensive domestically produced spirit products. The average bottle size on offer in the *Vinmonopolet* is 750ml. Within on-trade establishments, it's common for consumers to base their decision around whatever the bartender recommends, a reflection of the lack of advertising for alcohol in the country.

Secondary purchase criteria taken into account by consumers include:

- **Sustainability.** *Vinmonopolet* increasingly makes efforts to enable consumers to make environmental choices when purchasing spirits, with the use of recycled or deposit-based packaging often included in tender requirements.
- **Organic status / chemical-free ingredients.** This emerging purchase criterion, connected to sustainability and environmental concern, is increasing in popularity. For example, in 2023 *Vinmonopolet* launched a tender for an organic cognac from France. It is common for organic spirits to be imported. They tend to clearly and boldly display their organic status on their packaging.

Criteria of particular importance by spirit type are:

- **Cognac:** brand recognition. Given the high cost of cognac, price is generally not a particularly important criterion.
- **Whisky:** quality is generally an important criterion. Connoisseurs are particularly likely to pay attention to the vintage and age. Origin is often taken into account for similar reasons, with Japanese whisky the most popular in Norway, followed in order by Scottish (predominantly single malt), US and Irish.
- **Vodka:** there is much more price sensitivity for vodka than for other categories of spirits. Flavour may also be taken into account, with novel vodka flavours acting as a differentiator for products.

Spirits on retailers' shelves in Norway

As both previously and subsequently noted, *Vinmonopolet* is the only store which can sell alcoholic beverage with over 4.75% alcohol content, such as spirits. These stores are large and tend to have extensive ranges.



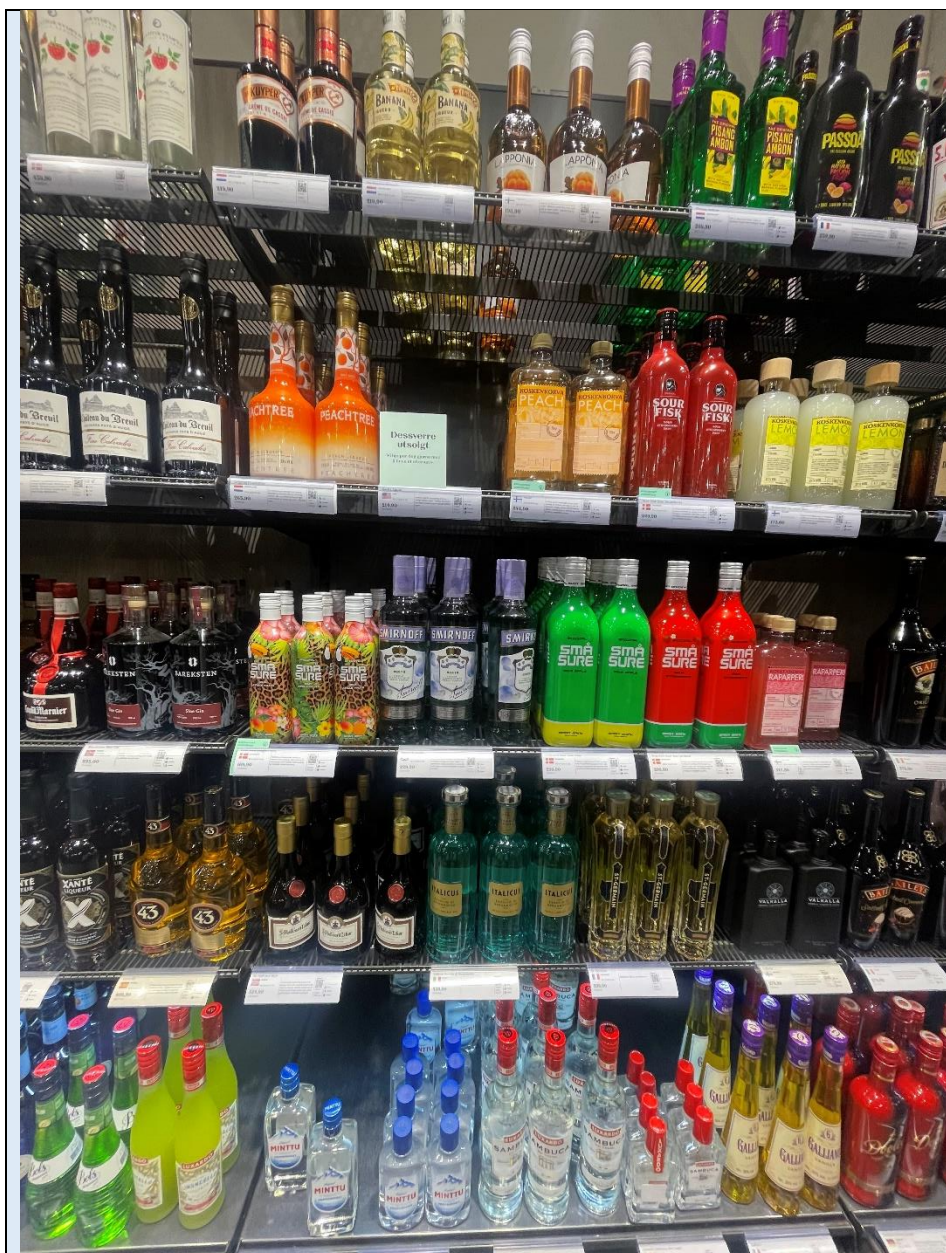
Above: outside of a Vinmonopolet store, with a view of the large interior space.

In terms of pricing, spirits generally retail in the region of NOK 350 to 700 per 700ml bottle; and indeed this price range corresponds to the normal pricing of mid-range spirits. While there are premium and super-premium spirits priced above this, combined these two categories represent between 5 and 10% of all sales by volume for most categories.

Spirits will be sorted by type. It is fairly common for the more expensive items to be at the eye or touch levels, with the cheaper products on the lower shelves. The price label on the shelf also indicated the origin and in some cases, a bit more information about the product.



Above: part of the cognac section of a Vinmonopolet. Below: part of the liqueurs section.



700ml glass bottles remain the predominant format, although there has been an increased interest in larger (e.g. 1 litre) glass bottles of late, spurred by pandemic bulk-buying. It is possible to find some smaller formats, most notably 500ml. There is increasing innovation in the area of bottle design with some consumers subsequently repurposing bottles once the product has been consumed.

Images © Euromonitor International / Agra CEAS, 2023

Recent market trends

There are several market trends which have impacted the Norwegian spirit drinks market in recent years such as:

Further market polarisation:

There is expected to be increased polarisation within spirits, with mid-priced offerings ceding ground to premium and economy spirits which is particularly true for vodka. Within gin, flavoured gins will continue to grow in popularity, capitalising on the success of pink gin. Local spirits with strong heritage credentials are also expected to see strong growth in off-trade volume sales, as local consumer tastes become more sophisticated and refined.

Rise in demand for low or no alcoholic spirits:

Lower alcohol content spirits will continue to grow in popularity, as local consumers become more health conscious. The fact that offerings below 22% alcohol content can be purchased by people aged 18-19, as opposed to the 20-year minimum age for higher alcohol content spirits is a key factor to consider. More generally, consumers have continued to become more mindful regarding their consumption of alcoholic drinks, which will favour low- alcohol content spirits.

Interest in new spirits

Historically less popular categories such as gin, tequila and Korean soju have grown strongly in recent years, with local producers also getting in on the act in the case of gin. Pink and flavoured gins have grown particularly strong of late and are likely to continue to do so. This provides opportunities both for the aforementioned categories, but also potentially for other, more novel categories of spirits.

Reopening of cross-border trade

Norwegians are known for travelling to neighbouring Sweden or Denmark (via ferry) to purchase cheaper spirit drinks. While this does not necessarily benefit EU spirits on sale in Norway, it does expose Norwegians to EU spirit brands which in turn may lead them to purchase these brands within Norway. The reopening (post-COVID19) of the on-trade consumption of spirit drinks will also positively impact spirit sales in Norway.

5.5.3 Offer

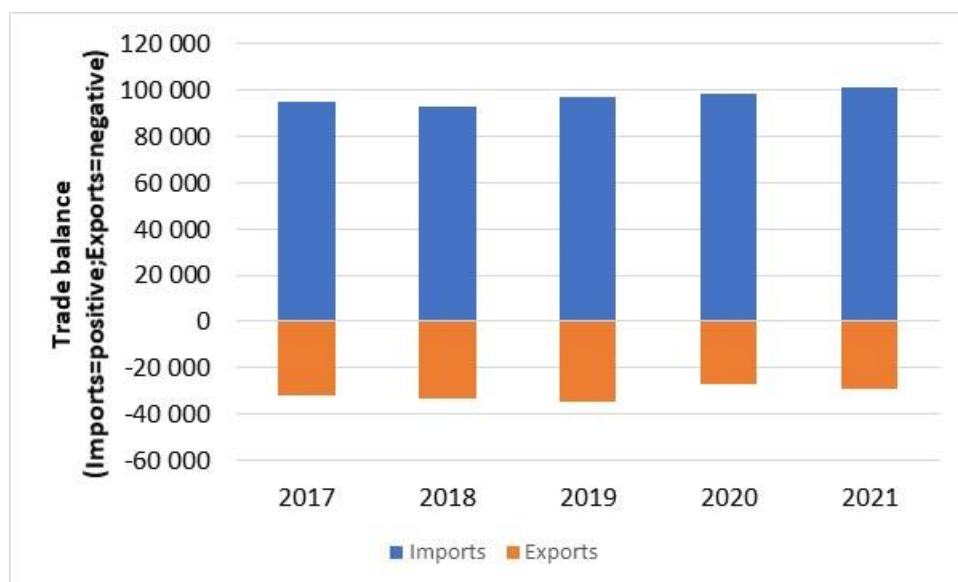
Domestic production

The production of spirit drinks in Norway is focused on Akvavit which is the national spirit drink. Notable companies which produce Akvavit in Norway include Arcus, Altia and Vectura. Up until 2009, the distilling of spirits in Norway was monopolised which reduced the capacity for domestic producers of whiskey, gin and other spirits to distil and refine their products over several years. There are several smaller producers now in Norway of whiskey, gin and vodka which are the three areas of growth in the domestic market.

Imports and exports

As shown below in Figure 5-20, Norway is a net importer of spirits, importing EUR 100 million worth of spirits and exporting EUR 30 million in 2021. Both imports and exports have remained fairly stable since 2017.

Figure 5-20: Trade balance (imports and exports) of spirits in Norway, 2017-2021 (EUR 000)



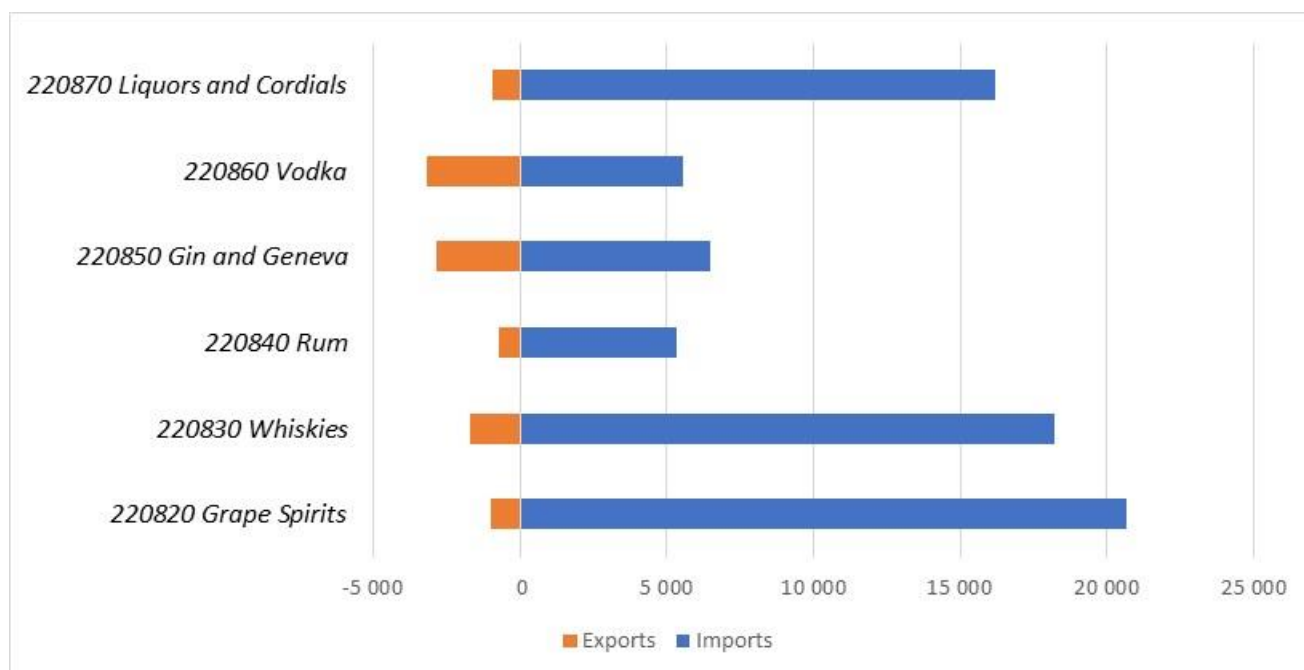
Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 2208.

As shown below in Figure 5-21, grape spirits are the most imported spirit product in Norway with imports worth EUR 21 million in 2021. This was followed by whiskies to a value of EUR 18 million and liquors and cordials at EUR 16.1 million.

Figure 5-22 below shows the origin of Norwegian spirit drinks imports, with France being the largest exporter at a value of EUR 24 million due to the popularity of liquors and cordials. This is followed by the UK with a value of EUR 19 million and Ireland at EUR 9.5 million. Other large EU exporters include Italy with a value of EUR 8.2 million and Germany with a value of 7.8 million.

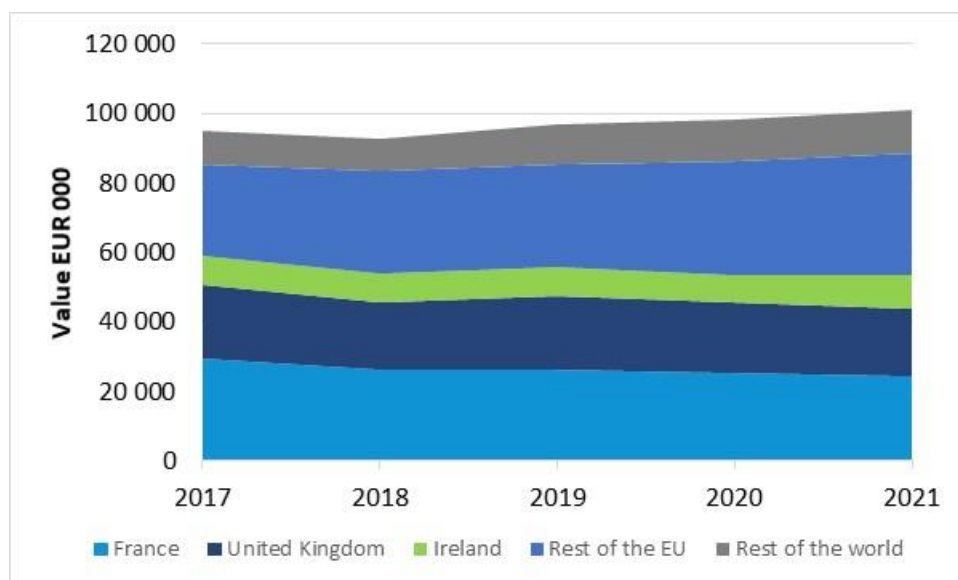
Figure 5-21: Trade balance (imports and exports) of spirits in Norway, by type, 2021 (EUR 000)



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Spirit names shortened. CN codes before spirit name.

Figure 5-22: Norwegian imports of spirits by country, 2017-2021 (EUR 000)



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 2208

EU GI products

As noted in section 4.2.4, Norway does not participate in the EU GI registration system for agricultural products and foodstuffs, as agriculture is not included in the EEA Agreement. However, EU spirit GIs are protected as the protection of GIs for EU wine and spirit names is included in the EEA agreement.

Main competitors

The largest competition for imported spirits in Norway comes from the UK which largely exports whisky and gin to Norway, which presents competition for large EU whisky producers such as Ireland. Domestically, Norwegian Akvavit is the most produced spirit presenting competition to producers of this product from Denmark, Sweden and Germany. Overall, the EU accounts for the majority of imported spirits consumed in Norway.

5.5.4 Specific market entry requirements

Market Access and Entry

The customs procedures for importing foodstuffs are set out in section 4.2.1. A full list of the general documentary requirements for export set out in Table 4-1, along with requirements by product category in Table 4-2. Requirements for spirits notably include:

In terms of tariffs, spirits are not subject to tariffs when exported from the EU.

Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:

Main page – select product, country of origin and destination country:

<https://trade.ec.europa.eu/access-to-markets/en/home>

Example link – general spirits category (2208) from France to Norway

<https://trade.ec.europa.eu/access-to-markets/en/results?product=220860&origin=FR&destination=NO/>

Standards, SPS measures labelling

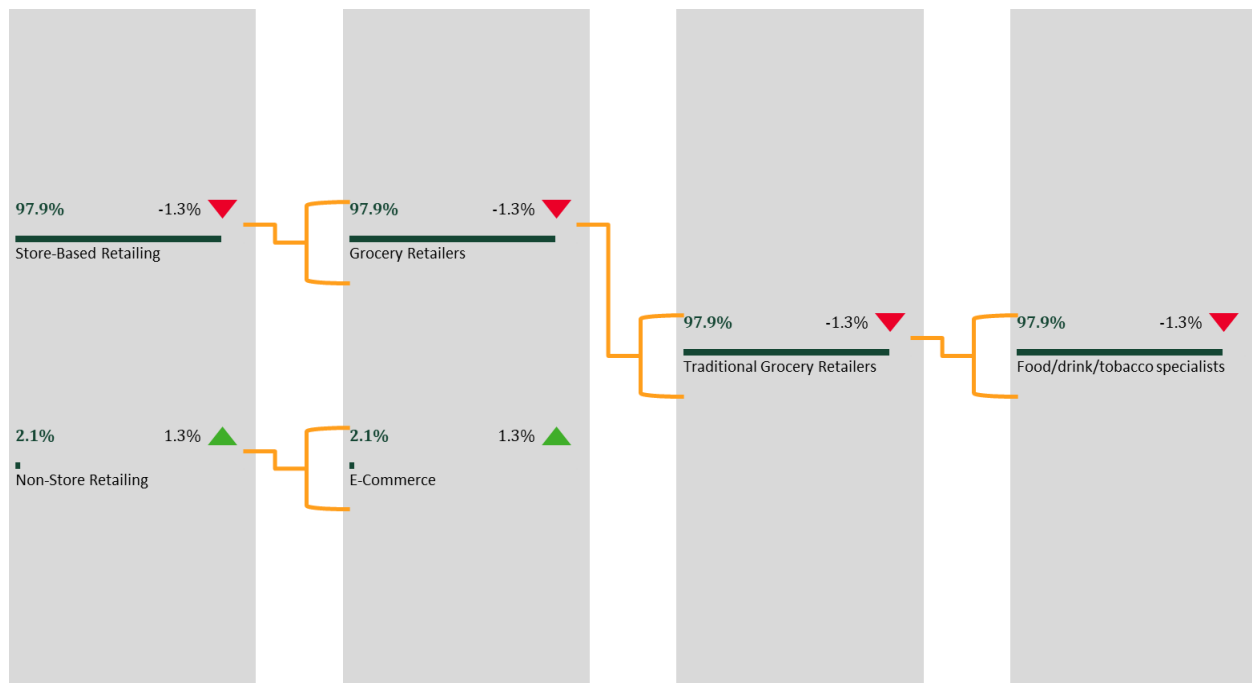
Regulations about requirements, prohibited substances not allowed for use in these products, quality requirements etc. are mostly the same as in the EU due to effort to harmonised Norwegian food safety requirements with EU legislation. It is the responsibility of the importer that the imported foodstuff is safe for human consumption and that the labelling and the content comply with Norwegian food regulations. The products must be labelled in Norwegian or in a language that resembles Norwegian (Swedish or Danish are the only generally accepted alternatives).

Article 16 of the EU FIC Regulation states that the declaration of the list of ingredients is not mandatory for beverages containing more than 1.2 per cent of alcohol by volume.

5.5.5 Distribution

As already stated and further shown below in Figure 5-23, the government-owned retailer *Vinmonopolet* is the only retailer permitted to distribute spirit drinks in Norway by law; hence, *Vinmonopolet* has a monopoly accounting for 97.9% of retail sales. The remaining sales are from the growing e-commerce channel of distribution. In Norway, on-trade sales accounted for 7.7% of spirits sales in 2021. *Vinmonopolet* has shown itself to be open to stocking the products of smaller producers; though it has been observed that not all product references it sells are available in all outlets.

Figure 5-23: Distribution channel overview of spirits in Norway (2021); off-trade volume



Source: Euromonitor International: Alcoholic Drinks, 2022.

5.5.6 Challenges for EU products

Challenges for EU spirit drinks in Norway include a ban on the advertising of alcoholic beverages in the country, the monopoly of distribution from the state-owned retailer *Vinmonopolet*, the restricted opening times for *Vinmonopolet* and the high price of spirits coupled with a high alcohol tax in Norway. Domestic spirits outside of Akvavit present a limited challenge for EU spirit drinks.

Market Takeaway: Spirits

Consumption: Spirit drinks consumption in Norway is lower than in neighbouring countries which is partially influenced by the ban on alcohol advertising in the country, the high price of spirits, and the reduced hours of sale permitted in the country. Younger consumers tend to seek out new and price-attractive spirit products while older consumers are more likely to consume domestic spirits such as akvavit and more expensive categories of spirits.

Competition: The UK is the biggest non-EU competitor due to its strength in the whisky and gin markets. Competition from domestic producers is more limited as production was only privatised in recent years. Outside of the UK, there are no major competitors.

Distribution: On-trade sales accounted for 7.7% of the volume of spirits distribution in 2021 while the rest is virtually all sold via the state-owned retailer Vinmonopolet which is the only legal distributor of off-trade spirits in the country. E-commerce is a growing distribution channel, albeit from a relatively low 2.1% share of off-trade spirit sales.

Challenges: The lack of ability to advertise coupled with being forced to accept reduced hours of sale as the state-run retailer Vinmonopolet closes early on most days are the biggest challenges in targeting Norwegian consumers of spirits.

Opportunities: The re-opening of the off-trade service sector, coupled with growing demand for no or low alcoholic spirits and the purchase of imported spirits as a common gift item are the three biggest opportunity areas in the Norwegian market.

5.6 Olive oil

5.6.1 SWOT analysis

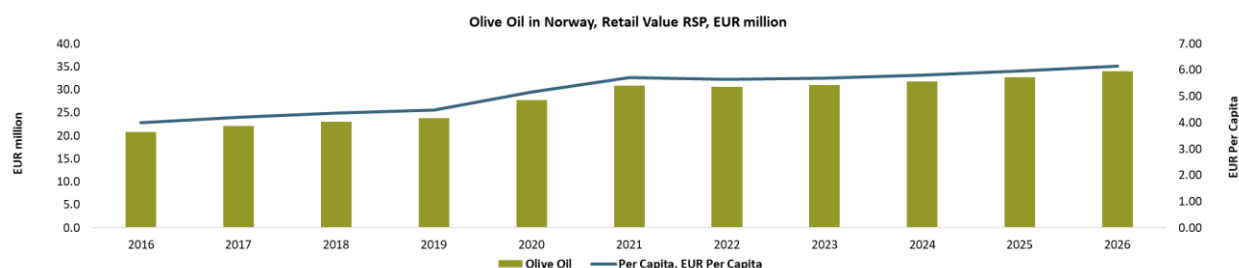
STRENGTHS (+)	WEAKNESSES (-)
- Norway is a strong consumer and importer of olive oil. - The olive oil market grew recently and is forecast to continue to grow. - Olive oil is the most consumed oil on the edible oil market in Norway. - Around 93% of exports to Norway are from the EU.	- Even though the market will continue to grow, its growth will be slower than in recent years. - Olive oil is more expensive than some other edible oils and price competition might continue to increase e.g. due to inflation. - Availability of cold-pressed healthier sunflower and rapeseed oil options, that are also cheaper than cold-pressed olive oil, strengthen competition.
OPPORTUNITIES (+)	THREATS (-)
- Premium products are popular due to the rising health consciousness of consumers. - The demand for private label products is increasing. This sector is highly diversified and also includes premium and organic products. - E-commerce sales remain low but are increasing, which makes it an interesting channel to dive into.	- The olive oil market is dominated by domestic companies selling private label (Coop Norge Handel AS, Norgesgruppen ASA, Jacobs Utvalgte, Haugen-Gruppen AS, and Rema 1000 Norge AS), which compete strongly on price with branded products. - Turkey is the main non-EU exporter, and the country's exports are growing. - Domestic production of other edible oils such as rapeseed, which are favoured by consumers for being produced locally.

5.6.2 Consumption

Evolution of consumption

Olive oil is the biggest edible oil market in Norway. The consumption of olive oil shows an upward trend in recent years and was growing at a high CAGR of over 8% between 2016 and 2021 when the market size reached close to nearly EUR 31 million. The forecasted average growth rate between 2021 and 2026 is much lower at about 2% per year. Yet, the olive oil market is forecast to have the highest growth rate in value terms compared to other edible oils in Norway. The market is forecast to increase to EUR 34 million by 2026. In 2021, per capita consumption was around 1 kilogram; with current growth trends, consumption is forecast to reach 1.1 kilograms per person in 2026 (Figure 5-24).

Figure 5-24: Evolution and forecast of the retail market for olive oil (value, EUR million) and olive oil expenditure (EUR) per capita, in Norway; 2016-2026



Source: Euromonitor International: Packaged Food, 2022.

Note: figures for 2022 to 2026 based on forecasts.

Consumers

Olive oil is a standard edible oil in Norway (and indeed it is the most popular overarching oil category), which is why it is used by many different consumer groups, age groups, etc. Indeed, the wide availability of private label products, including at different price points, has made olive oil accessible to consumers of varying incomes. Particularly health-conscious consumers choose olive oil over other edible oils because it is viewed to be a healthy edible oil. Due to its higher price point, branded premium olive oil consumers usually have larger disposable incomes. People with less disposable income are more likely to opt for entry level private label products and/or cheaper edible oils. Young (25-40 year old) working professionals who have travel regularly to Mediterranean countries are a notable interesting consumer segment.

Drivers and method of consumption

Olive oil consumption has been negatively affected by the reopening of the border after lockdowns related to the COVID-19 pandemic. During the COVID-19 pandemic, Norwegian consumers had to purchase their olive oil in Norway, whereas now many of them go to neighbouring countries (mainly Sweden) to purchase it at a cheaper price. Moreover, the market has been negatively affected by consumers going back to their busy lifestyles, which means they spend less time at home and thus cook and bake less. Consumers switch to packaged options and foodservice instead.

Norwegian consumers are getting accustomed to cooking with olive oil. It is the main edible oil and is used for most dishes, warm and cold. It is for example used to fry ingredients or on top of a salad. A key driver of olive oil consumption is the health trend. Norwegian consumers pay attention to what they consume and olive oil is viewed to be one of the healthiest oils available.

Purchase criteria

Depending on what consumers are looking for they choose between different types of edible oil. Olive oil is the most popular type, followed by rapeseed oil and sunflower oil. Some consumers might favour rapeseed oil because it can be produced domestically, whereas olive oil is imported. Rapeseed oil offers a wider assortment of e.g. cold pressed products as well as premium products which is another reason why some consumers might prefer it. Also, consumers might choose rapeseed oil for its neutral taste.

Even though the price is important to consumers, for most of them quality comes first. Higher-income consumers often choose olive oil or even extra virgin olive oil from well-known brands, whereas more price-conscious consumers are likely to opt for private label products. These are perceived to be cheaper while still offering good quality products. A more recent trend is for mid-higher income consumers to buy both premium and private label products, using the former for raw consumption (e.g. salad dressings) and the latter for cooking. It should be noted that there is an increasing variety of private label products covering different price points, from budget, through standard, to premium.

The pack type and pack size also play an important role. Some consumers might prefer smaller packages whereas others prefer larger ones.

Olive oil on retailers' shelves in Norway

In terms of pricing:

- Economy olive oil - which is often private label - tends to retail for around NOK 60 (EUR 5.50) per 500ml
- Mid- range products mainly retail in the range of NOK 80 to 120 (EUR 7.50 to 11) per 500ml
- Premium products retail from NOK 120 (EUR 11) upwards per 500ml.

In the face of increased competition from cheaper private label products, and against the background that high-mid range and premium products may retail for over twice that of the cheaper options, branded producers are increasingly using certifications to differentiate their products. Organic is particularly common, though it is also common to find products with nutritional labels such as the Nordic keyhole. It should, however, be noted that private label products increasingly try to use these same practices as well.



Above and below: olive oil in major retailers. It can be seen that the 500ml glass format dominates. Both private label and organic products can be seen in the second photo.



In terms of packaging size, a 500ml glass bottle is most common, with the vast majority of products falling in this format. Smaller and larger sized glass bottles (250ml and 750ml may also be occasionally found). The use of plastic (PET) bottles is rare, though some bulk formats (e.g. 1 litre) can be found in plastic bottles.



Above: a few larger format (1 litre) bottles are also available. It can be seen that some producers are using the keyhole logo to differentiate their product.

Photos © Euromonitor International / Agra CEAS, 2023.

Recent market trends

The following recent market trends can be observed:

- **Premiumisation and health trend:** Norwegian consumers are highly health conscious and their health consciousness even increased during the COVID-19 pandemic. Consumers pay attention to their nutrient intake and the kind of food they choose. Olive oil has a lot of perceived health benefits and the Mediterranean diet, which includes a lot

of olive oil, is viewed to be the healthiest in the world. Thus, consumers continue to value premium olive oil as well as extra virgin olive oil because of its perceived health. In the coming year, the premium and super premium segments are likely to grow which makes them an interesting option for brand manufacturers. Even private label producers focus on increasing the quality and positioning of their products through the use of high-quality ingredients, flavours, certification and exclusive packaging.

- **Rise in private label:** As already touched on in the premiumisation trend, the private label segment is gaining a growing share in olive oil. An increasing number of private label products are available on the market. These offers are getting very diversified and also include premium and organic products. In Norway, organic private label products from Änglamark and Go Eco and premium private label options from Jacobs Utvalgte have been introduced to the market. The private label segment also rose because of weak consumer confidence due to inflation, which made some consumers trade down from branded to private label products. Although this remains limited, it might increase in the coming years due to the uncertain economic climate. This trend makes it more complicated for brand manufacturers to differentiate their products on the Norwegian market.
- **E-commerce:** Even though the e-commerce channel remains very small, it continues to grow year after year, which makes it an interesting channel to dive into especially because olive oil is a shelf-stable product. While using e-commerce as a channel, importers can eliminate the need for a further middleman.

5.6.3 Offer

Domestic production

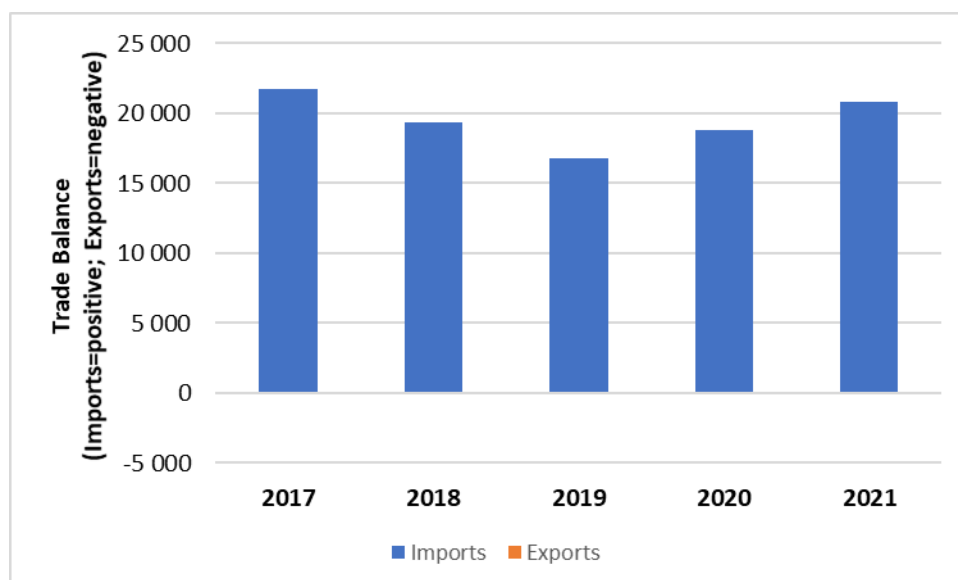
Due to the geographic location of Norway, the country does not grow olives and thus does not produce its own olive oil.

However, the olive oil market is dominated by domestic companies that mainly sell private label products. Coop Norge Handel AS holds close to 22% of the market share with brands such as Coop and Änglamark, both of which are private label. Norgesgruppen ASA follows closely with more than 20% due to its Eldorado brand, and Jacobs Utvalgte brand, which both are private label brands as well. Haugen-Gruppen AS holds close to 18% of the market share mainly due to its Ybarra brand and Rema 1000 Norge AS has a market share of over 15% due to its private label brand, which is Rema 1000.

Imports and exports

As can be seen in Figure 5-25, Norway is a net importer of olive oil. The country effectively exports no olive oil (there is a very small number of re-exports). In 2021 Norway imported olive oil worth close to EUR 20.8 million. Between 2017 and 2019 imports of olive oil decreased and then increased again in 2020 and 2021.

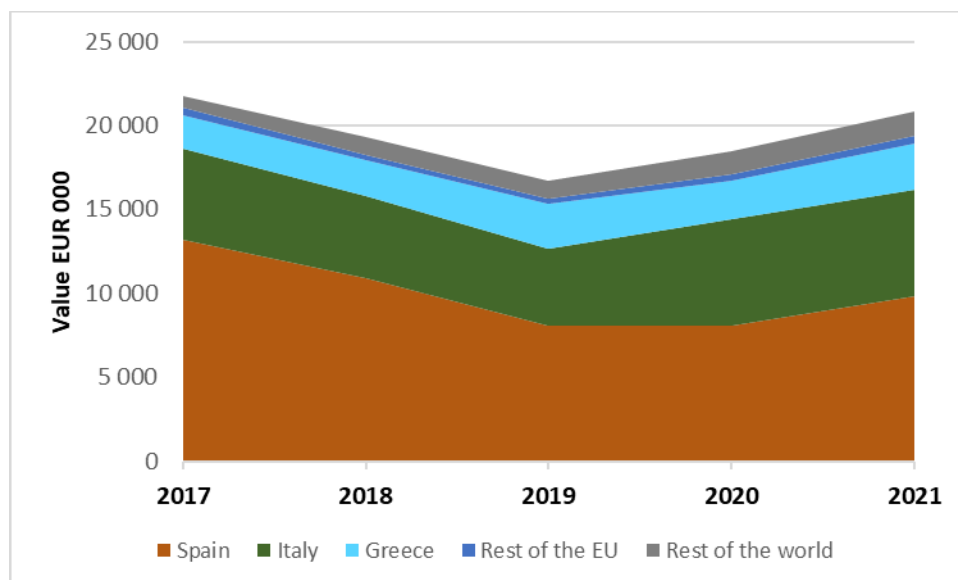
Figure 5-25: Trade balance (imports and exports) of olive oil in Norway, 2017-2021 (EUR 000)



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 1509.

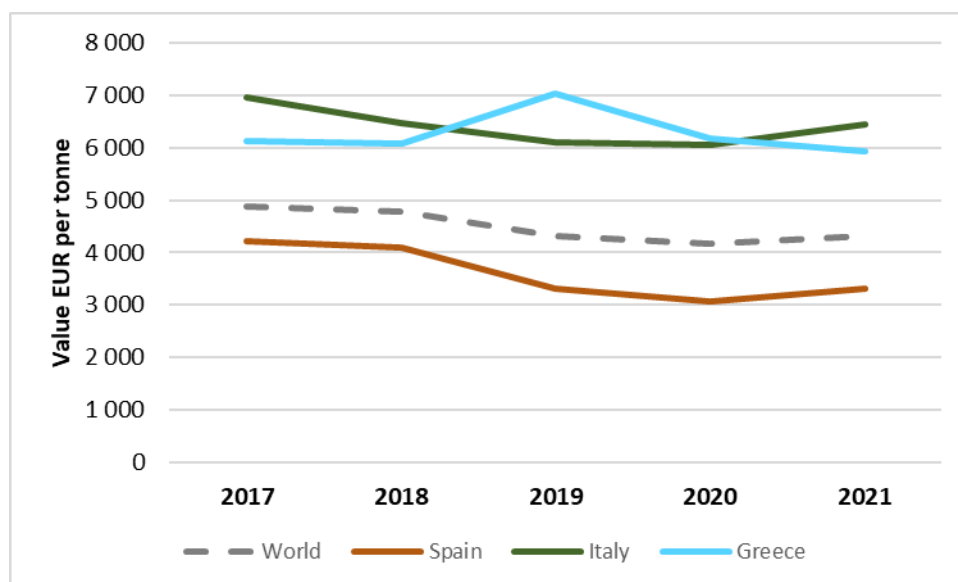
Spain is the main exporter of olive oil to Norway (Figure 5-26). Spain alone accounts for nearly half of the total imported value. The Ybarra brand is particularly popular in Norway, and Spanish olive oil is also extensively used in private label brands. In 2021, Spain exported olive oil worth close to EUR 9.8 million. Italy ranked second and exported around EUR 6.3 million of olive oil. The brands Monini, Ravida and Roi are particularly popular. Greece ranked third with approximately EUR 2.7 million, with Gaea's and Iliada's ranges popular. Five out of the top 10 exporters to Norway are from the EU. The EU in total accounted for more than 93% of olive oil imports to Norway in 2021. The biggest non-EU player is Turkey, while there are also some re-exports to Norway (mainly from the UK).

Figure 5-26: Norwegian imports of olive oil by country, 2017-2021 (EUR 000)

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
 Data for CN code 1509.

In 2021, the world's average unit value per tonne of olive oil imports to Norway was around EUR 4 300 as shown in Figure 5-27. The unit value decreased between 2017 and 2020 and started to increase again in 2021. In 2017 it was at around EUR 4 900. The unit values of Italian and Greek olive oil are higher than the world's average. The unit value for olive oil from Italy was about EUR 6 400 per tonne in 2021 and for olive oil from Greece was approximately EUR 5 900. The unit value of olive oil from Spain is below the world's average, at about EUR 3 300 in 2021. The unit value of olive oil from the biggest non-EU player Turkey was also below the world's average in 2021.

Figure 5-27: Unit value of Norwegian imports of olive oil by country, 2017-2021 (EUR per tonne)



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 1509.

EU GI products

As noted in section 4.2.4, Norway does not participate in the EU GI registration system for agricultural products and foodstuffs, as agriculture is not included in the EEA Agreement. As a result, registration is required in the national GI system of Norway, which is called Beskyttede betegnelser. Currently, no olive oil from the EU is registered under the Norwegian GI system.

Main competitors

Even though there is no olive oil production in Norway, the olive oil market is dominated by private label products sold by domestic companies. The market is dominated by Coop Norge Handel AS, Norgesgruppen ASA, Jacobs Utvalgte, Haugen-Gruppen AS, and Rema 1000 Norge AS.

Regarding imports of olive oil, the EU is the main source and accounts for more than 93% of the imported market value in Norway. However, in particular Turkey stands out as a non-EU competitor.

5.6.4 Specific market entry requirements

Market access and custom procedures

Preferential trade with the EU and Norway is ruled by Article 19 of the EEA Agreement. The Norwegian food legislation is harmonised with the EU, and import requirements are generally also

the same as in the EU. However, the EEA Agreement does not cover the EU common agriculture and fisheries policies or direct and indirect taxation.

In addition to the general documentation requirements that are listed in Table 4-1 certain additional documents are needed. These include a notification to deal in agricultural goods and a registration of importers with the Norwegian food safety authority (Mattilsynet). Most documents can be in English or Norwegian.

Olive oil for feed purpose is taxed at NOK 4.88 per kg and other olive oil at 0%. Tariffs are the same as the MFN.

Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:

Main page – select product, country of origin and destination country:

<https://trade.ec.europa.eu/access-to-markets/en/home>

Example link – olive oil (1509) from Italy to Norway

<https://trade.ec.europa.eu/access-to-markets/en/search?product=1509&origin=IT&destination=NO>

Standards

As a member of the EEA, Norway conforms with EU Regulation 178/2002 (General Food Law), which is the harmonized regulation setting out the general principles and requirements of the EU's harmonized food law. More information can be found in section 4.2.2.

Labelling

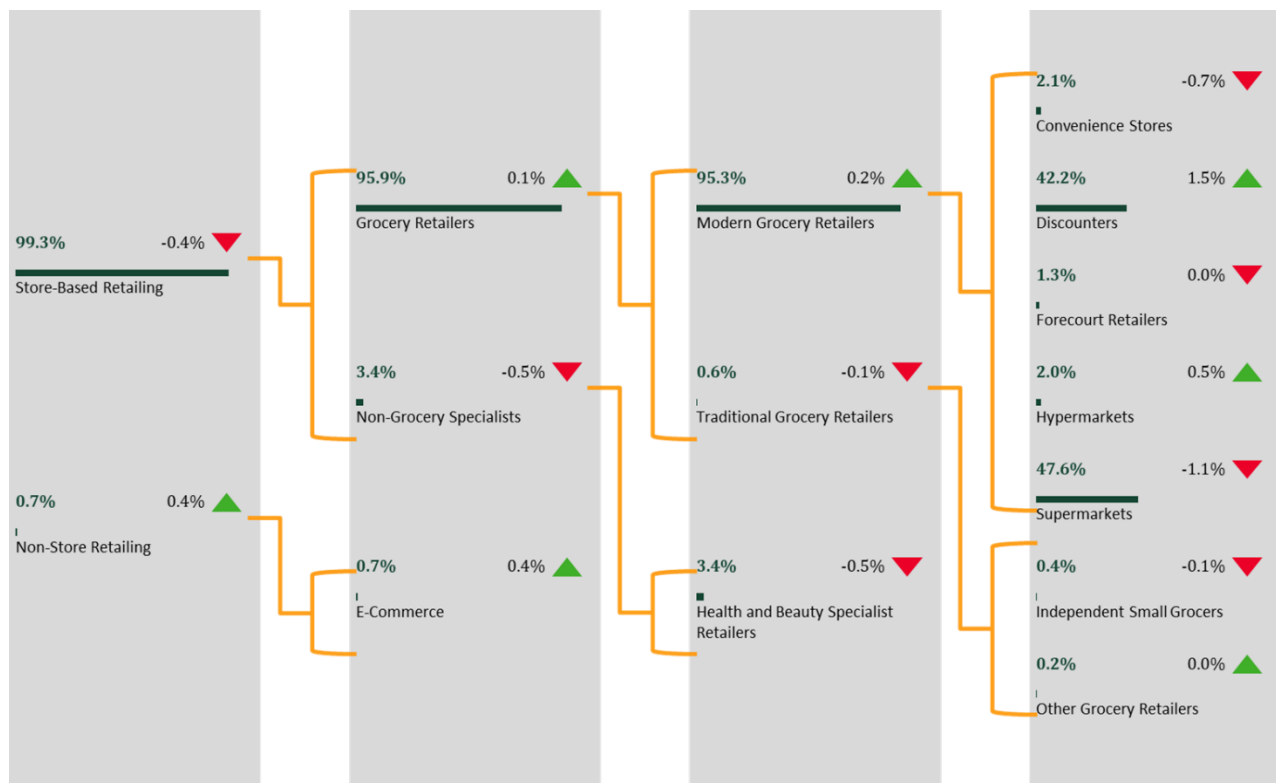
The EU's legislation on general labelling and nutritional labelling is applied in Norway. EU requirements regarding food labelling are laid out in the FIC Regulation (EC) 1169/2011. Labels must be either in Norwegian, Swedish, Danish and sometimes Finnish language. More information on labelling can be found in section 4.2.3.

5.6.5 Distribution

Figure 5-28 shows retail distribution channels by retail value for edible oils as a whole in Norway. Modern grocery retailers account for about 95.3% of the total sales of edible oils. Within this category, supermarkets are the most popular channel and account for 47.6% of retail sales and discounters account for 42.2%. Between 2017 and 2021 the popularity of discounters as a channel increased, whereas the popularity of supermarkets decreased. Non-grocery specialists accounted for around 3.4% of the retail value in 2021, but this channel also declined since 2017. E-commerce on the other hand increased, albeit from a low base, reaching 0.7% in 2021.

Overall, retail dominates the distribution of olive oil in Norway, accounting for over 80% of the volume, compared to 20% for food service channels.

Figure 5-28: Distribution channels overview of edible oils (including olive oil) in Norway (2021); retail value



Source: Euromonitor International: Packaged Food, 2022.

5.6.6 Challenges for EU products

As the EU is the main supplier of olive oil to Norway, the market offers many opportunities and thus is highly attractive for EU producers. However, the country is sparsely populated, which means the Norwegian market is comparatively small. Moreover, there is competition from other edible oils, mainly rapeseed and sunflower oil, which together are sold in higher volumes than olive oil. Rapeseed oil is even produced domestically and thus cater to the local produce trend unlike imported olive oil. Furthermore, the private label trend might be a challenge for producers of branded products. The ongoing inflation also plays a role as consumers might downgrade to cheaper types of edible oils or private label products in the future.

Market Takeaway: Olive oil

Consumption: A popular, universally consumed oil. In 2021 the olive oil market value reached close to EUR 31 million. It has been growing in recent years and is forecast to continue to grow, although at a slower pace.

Competition: Nearly no competition from non-EU exporters as the main exporters are EU Member States (mainly Spain, Italy and Greece). The main non-EU exporter is Turkey. However, private label products of Norwegian retailers pose significant competition vis a vis branded products.

Distribution: Mostly through supermarkets and discounters. E-commerce is a niche but growing rapidly. Retail dominates over food service.

Challenges: Comparatively small market. Competition with other edible oils such as rapeseed and sunflower oil, with rapeseed even produced locally. Private label products are a challenge for producers of branded products. Inflation decreases consumers' willingness to pay.

Opportunities: Premium and super premium products are in demand. Premium private label products are gaining popularity as well. The e-commerce market is growing from a very low base, and offers new possibilities for EU exporters.

5.7 Chocolate confectionery

5.7.1 SWOT analysis

STRENGTHS (+)	WEAKNESSES (-)
- Norway is a net importer of chocolate confectionery. - The EU accounts for over 90% of the imports market value. - Consumers' interest in high-quality premium chocolate confectionery is high.	- The market size of the chocolate market is forecast to decline. - Norway is a rather small market for chocolate confectionery compared to other countries. - The increasing health-consciousness of consumers.
OPPORTUNITIES (+)	THREATS (-)
- Tablet largest category. Only countlines and boxed assortments forecast to grow (boxed assortments are forecast to grow the most). - Niche product segments and smaller buyers focused on high quality, sustainability and health. - E-commerce continues to grow in popularity (albeit from low base) and thus offers new opportunities.	- The market is dominated by large international and domestic companies. - Some competition from non-EU suppliers (mainly the UK, Switzerland, and the US). - Local artisanal chocolate manufactures that produce premium chocolate products.

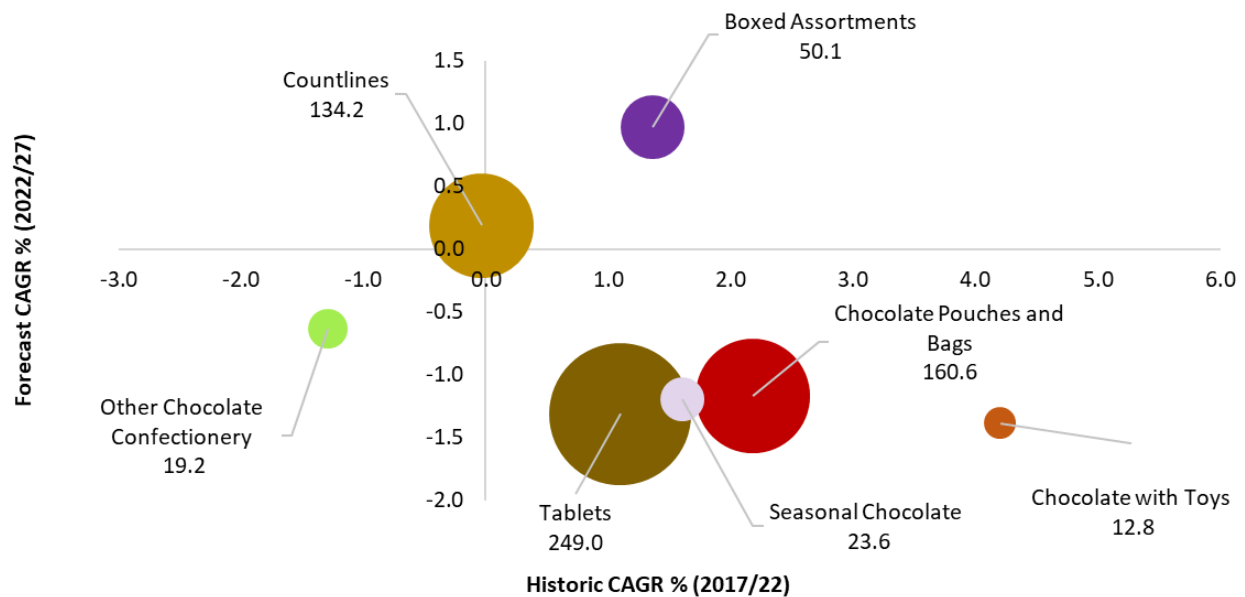
5.7.2 Consumption

Evolution of consumption

In 2022 the total market size of the chocolate confectionery market in Norway was about EUR 650 million. As shown in Figure 5-29 the biggest market segment is for tablets with a size of about EUR 249 million, followed by chocolate pouches and bags with close to EUR 161 million. Countlines was the third biggest market with around EUR 134 million. The market sizes of the remaining chocolate categories were much lower. The market size for boxed assortments was approximately EUR 50 million and seasonal chocolate had a market size of about EUR 24 million. Other chocolate confectionery had an approximate market size of EUR 19 million, followed by chocolate with toys with close to EUR 12 million.

Historically, the chocolate market has been growing in the last few years. Between 2017 and 2022 chocolate with toys showed by far the highest CAGR at 4.2%. This was nearly double the growth of chocolate pouches and bags at about 2.2%. Seasonal chocolate grew at a historic CAGR of more than 1.6% between the same years, boxed assortments at over 1.4%, and tablets at 1.1%. On the other hand, the market for countlines did not grow and the market for other chocolate confectionery has been declining between 2017 and 2022 at more than -1.3%. The forecasted growth looks very different from historic growth, as the chocolate market is forecast to decline for most categories and to slow down for a few categories. Between 2022 and 2027 the market size of boxed assortments is forecast to grow at the highest CAGR of 1% and tablets at the second-highest at around 0.2%.

Figure 5-29: Evolution and forecast of the chocolate confectionery market in Norway, 2017-2027; total retail value (EUR million)



Source: Euromonitor International: Packaged Food, 2022.

Consumers

Norwegians eat around 9 kg of chocolate per capita each year, which makes chocolate a standard sweet treat in Norway.³¹ Consumers of chocolate confectionery come from all parts of society because everyone enjoys a treat now and then, no matter their status or age.

In general, lower-income consumers tend to purchase cheaper treats or cheap chocolate, whereas higher-income consumers are the most likely to purchase premium chocolate products. As many Norwegians are generally wealthy most consumers tend to prefer high quality premium chocolate.

Environmentally conscious consumers purchase products that are manufactured sustainably and are made with ethically sourced ingredients, whereas health-conscious consumers are more likely to pay attention to the healthiness of ingredients and thus opt for value added or dark chocolate.

Finally, adult consumers are more likely to consume tablets and boxed assortments, with a focus on the health attributes of the chocolate. This makes dark chocolate more popular among them. On the other hand, children are more attracted by packaging and colours. They are obviously the key consumer group of chocolates with toys, but also important consumers of countlines and pouches / bags.

³¹ Where to find the best Norwegian chocolate, <https://www.visitnorway.com/things-to-do/food-and-drink/norwegian-chocolate/#:~:text=Did%20you%20know%20that%20Norwegians,kilos%20of%20chocolate%20a%20year!>

Drivers and method of consumption

During the COVID-19 pandemic, demand for chocolate was higher than usual because people were spending more time at home and wanted to treat themselves. Moreover, Norwegian consumers were not able to go cross-border shopping in Sweden and thus relied on chocolate available in Norwegian supermarkets, etc. On top of this, the sugar tax was abolished in 2021 which made chocolate more affordable in Norway. As people go back to living their normal lives after the crisis, and the Swedish border is open again, the chocolate confectionery market is forecast to decline in Norway. Another driver for the decline are the increasing prices due to inflation.

As said, consumers are going back to their pre-COVID-19 pandemic lifestyles, which means they spend more time outside their homes and potentially allow themselves fewer treats. People also partly return to their offices. This behaviour drives the demand for convenient purchases rather than take home products. Thus, even though convenience stores and the foodservice industry struggled during the COVID-19 pandemic, these channels are forecast to grow. In particular, small pack sizes drive the demand for chocolate confectionery because they are an easy snack during a busy day on the run.

Even though chocolate is mostly consumed as a snack and sweet energizer during the day, it is also used in baking. Norwegian consumers use it for example to bake traditional *sjokoladekake* (chocolate cake) or to make international recipes such as American brownies.

In particular boxed assortments are furthermore popular gifts for different occasions, such as birthdays, Valentine's Day, etc. Indeed, the practice of gifting chocolates is something that is gaining traction in Norway. Consumers may now include chocolates as part of a larger gift bag (of various products) which are often given at Christmas.

Purchase criteria

Even though the price does play a role for Norwegian consumers when purchasing chocolate, the most important criterion for most consumers is quality. Many consumers prefer to pay a little bit extra if that means the quality is better. Many even opt for premium chocolate products. This is due to the high purchasing power and high living standards of Norwegian consumers.

The type of chocolate and the taste also are important criteria. Filled chocolate, for example, is by far the most chosen tablet type, which is preferred by more than half of consumers, followed by plain milk chocolate. Plain dark and plain white chocolate are less popular. Around 40% of consumers stick to the chocolate they already liked in their childhood, whereas a majority of consumers are open to try something new.

The packaging plays a role as well. Currently, consumers prefer smaller pack sizes because of their convenience, in particular when they are on the go. For home consumption, consumers might prefer to purchase larger packs as those are usually better value for money.

However, health-conscious consumers are likely to prefer smaller pack sizes in general because they consider too much chocolate to be unhealthy. Health-conscious consumers are likely to purchase chocolate products with lower sugar content, or free-from products including lactose-free, and gluten-free chocolate.

Sustainable consumers on the other hand pay attention to how environmentally friendly a product is, as well as how it is produced and sourced. Sustainability is an important purchase criterion in Norway. Chocolate products should clearly show that they have been produced in a transparent,

sustainable, ethical and environmentally friendly way. Organic products are particularly chosen more frequently by sustainably minded consumers.

Chocolate confectionery on retailers' shelves in Norway

Pricing for chocolate confectionery depends to a high extent on the type of the product. However, to provide a rough indication in the case of bars:

- Standard products tend to retail for under NOK 30 (EUR 2.75) per 100g
- Premium products typically retail for NOK 40 to 60 (EUR 3.65 to 5.50) per 100g

It is not uncommon for price discounts to be offered on chocolate confectionery products such as bars and tablets.



Chocolate sections in major retailers often are more restricted in size and the range of products the offer, with limited separation of different sub-categories and a strong presence of multinational brands.



Above: chocolate section in a supermarket.

In terms of packaging, cartons are common for tablets and also for boxed assortments, while flexible plastic or aluminium packaging is the standard for bars and pouches.



Above: imported boxed assortment in a supermarket. Below: tablets displayed above countlines. Certifications are common on tablets.



Photos © Euromonitor International / Agra CEAS, 2023

Recent market trends

The following recent market trends for chocolate and sugar confectionery stand out:

- **Flavour innovations and premiumisation:** The chocolate manufacturing industry in Norway focusses on the introduction of new and exotic flavours and combinations to keep consumers interested. Recently they have also combined innovations used in other snack categories. Mondelez for example introduced a premium dark chocolate line that uses flavours such as coconuts, marzipan, salty liquorice, pecan & sea salt or caramelised nuts. Producers in Norway are good at utilising typical Norwegian flavours in their chocolate production, with liquorice being a favourite in the Nordics. Unique ingredients are being used alongside high-quality packaging design to offer more premium products.
- **Health and wellness trend:** Norwegian consumers are very health conscious and this further increased during the COVID-19 pandemic. As a result, many consumers look for healthy snacking options. Some of them opt for smaller pack sizes because they aim to eat less, whereas others look for functional chocolate products such as protein or energy bars with a chocolate flavour. There are furthermore opportunities for chocolate confectionery with a healthier positioning such as dark chocolate products. The increased importance of wellness since the pandemic opens opportunities for premium chocolate products.
- **Importance of sustainability:** Norwegian consumers also pay more and more attention to the sustainability of the products they purchase. This means that products that are sustainably produced and ethically correct find many opportunities in the market. Organic chocolate products are particularly favoured in Norway.³²
- **Increases in gifting.** There is a growing trend of people buying food items as gifts, especially during festive occasions like Christmas and Valentine's Day; and this is benefitting chocolate in particular. Consumers tend to buy packaged assortments as gifts or create gift bags with various products. These gift bags often contain premium items such as high-quality cookies, luxury products, and chocolate confectionery. Many chocolate gift boxes also come in innovative packaging that is tailored to a specific occasion.
- **E-commerce:** Even though this distribution channel remains a niche it is growing a lot. Large players such as Oda.no, Norgesgruppen's online stores, offer many different chocolate products similar to those offered in stores. Online shopping is more convenient, which is why it is likely that more consumers will make the switch in the future. Thus, the online channel might offer more opportunities in the future for manufacturers to explore.

5.7.3 Offer

Domestic production

Norway is a rather small player in the European cocoa imports market. The country's cocoa bean imports are rather limited at around 13 tonnes per year. Consequently, Norway's chocolate manufacturing industry is also a rather small player by European standards. However, cocoa imports have been on the rise since 2016, increasing by close to 20% annually during the last few years. About 85% of imported cocoa beans are directly sourced from the origin (mainly Peru).

³²The Scandinavian market potential for cocoa (2021), <https://www.cbi.eu/market-information/cocoa-cocoa-products/scandinavia/market-potential>

Direct imports are likely to continue to increase due to the growing bean-to-bar market as well as consumers increasing looking for the traceability of ingredients.

The annual production value of the cocoa and chocolate industry is around EUR 300 million. The market is strongly dominated by Mondelez Norge AS, which accounts for over 40% of the market due to its popular *Freia* brand. Even though Mondelez is an international company it has an office and manufacturing side in Oslo, which opened in 1889.³³ Orkla Confectionery & Snacks Norge ranks second with a market share close to 30% mainly due to their *Nidar* brand. Orkla is the main supplier of branded consumer goods as well as concept solutions in the Nordics and other areas. Its headquarters are located in Oslo, which means it is a domestic Norwegian company. The company employs over 21 000 people and offers 300 brands produced in 114 factories that are sold in 100 countries.³⁴ Conaxess Trade Norway AS ranks third with a 5% market share and brands such as *Kinder Surprise*, and *Kinder Maxi*. It is the leading marketing, sales and distribution company in the Nordics.³⁵ Norge AS has a market share of close to 5% due to its *Cloetta*, and *Candyking* brands. Cloetta has a strong Norwegian heritage and already back in the 18th century the Cloetta brothers established a factory in Oslo.³⁶

The bean-to-bar market has been growing in recent years. Many of the most stylish, modern and appreciated brands in the craft chocolate market are situated in Norway. This includes *Fjåk Sjokolade* and *Bonnhort*.³⁷

Imports and exports

Figure 5-30 shows that Norway is a net importer of chocolate confectionery. In 2021, imports of chocolate confectionery were worth EUR 203 million, whereas exports were worth EUR 29 million. This means Norway imported seven times more than it exported in the same year. Since 2019 the value of imported chocolate confectionery increased by EUR 41 million when compared to 2021. The value of the export market has been fluctuating and was highest in 2019; between 2017 and 2021 it overall decreased by approximately EUR 370 000.

³³ About us, <https://www.mondelezinternational.com/Norway>

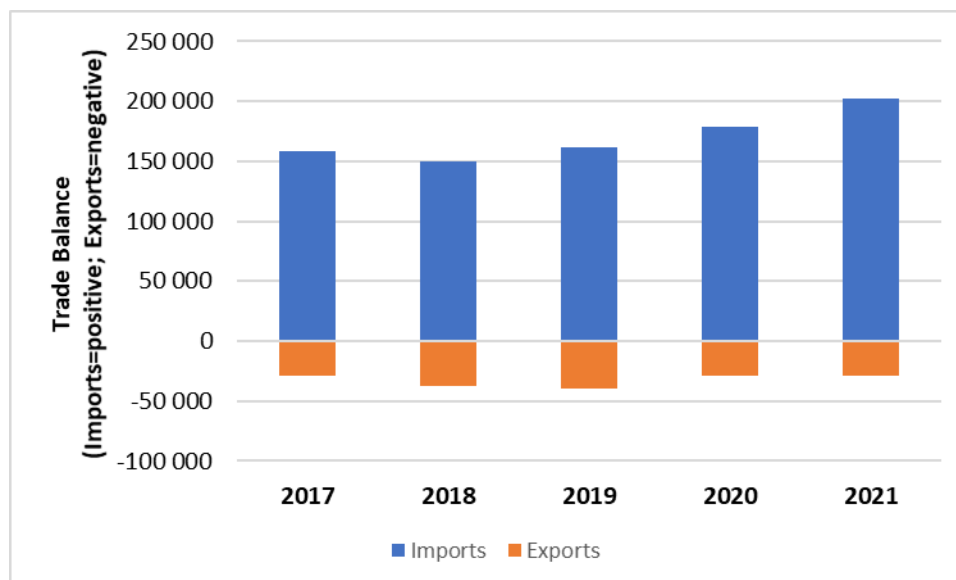
³⁴ About us, <https://www.orkla.com/about-us/>

³⁵ About us, <https://www.conaxesstrade.com/about-us/>

³⁶ Norway, <https://www.cloetta.com/en/markets-and-brands/cloettas-main-markets/norway/#:~:text=Cloetta%20has%20a%20strong%20heritage,leading%20brands%20in%20the%20market>.

³⁷ Craft Chocolate Makers From Northern Europe Are Taking Over The Market: What Makes Them So Special? A Marketing Analysis. (2021). <https://www.thechocolatejournalist.com/blog/nordic-craft-chocolate-makers>

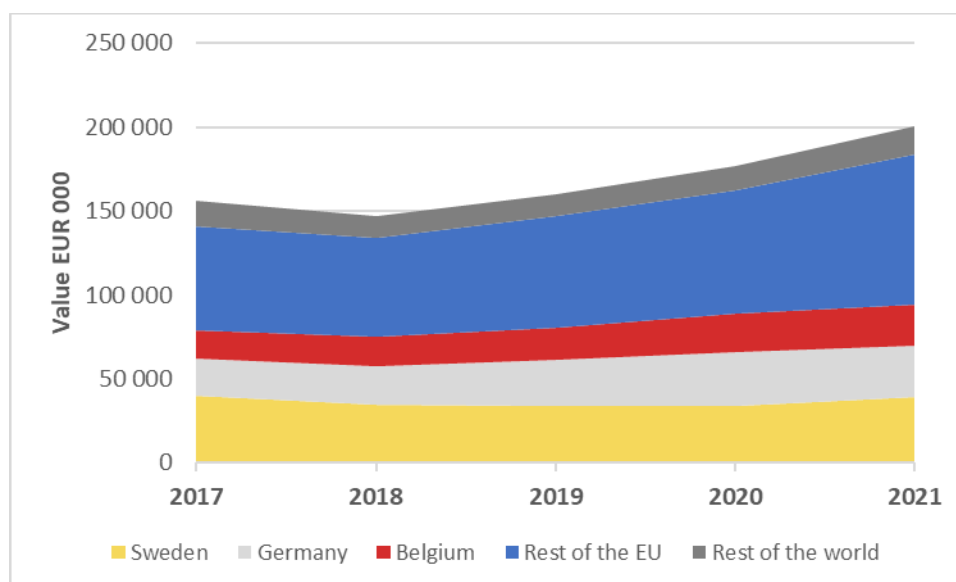
Figure 5-30: Trade balance (imports and exports) of chocolate confectionery in Norway, 2017-21; EUR 000



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 1806.

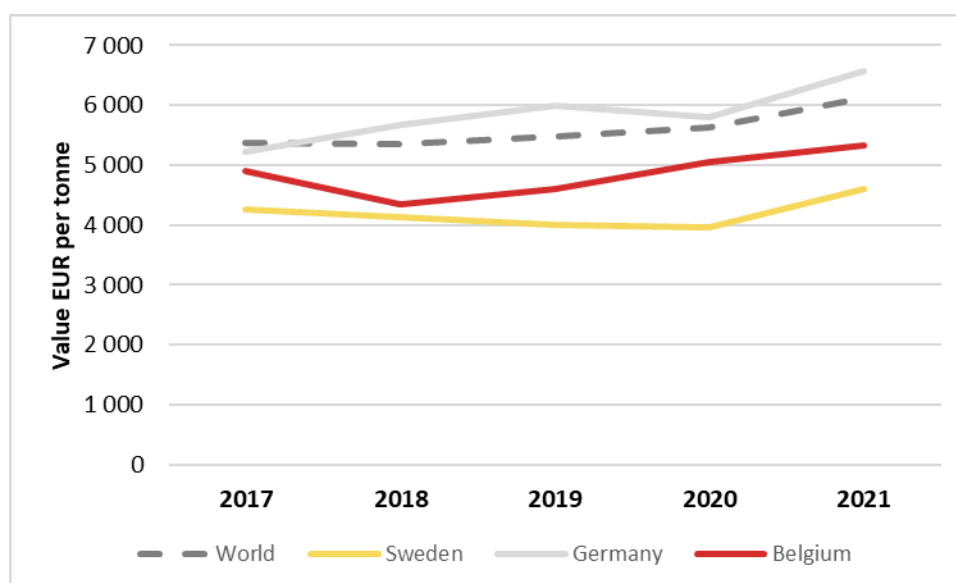
In 2021 the three main exporters of chocolate confectionery to Norway were Sweden, Germany, and Belgium. Sweden was the main exporter of chocolate confectionery to Norway, with exports worth more than EUR 39 million as shown in Figure 5-31. Thus, Sweden alone accounted for close to 20% of Norway's imports by value. Germany exported about EUR 31 million, followed by Belgium with EUR 24 million. Nine out of the top ten chocolate confectionery exporters are from the EU. The EU in total accounted for about 90% of imports by value. The main non-EU exporters are the UK, Switzerland, and the US.

Figure 5-31: Norwegian imports of chocolate confectionery by country, 2017-21; EUR 000

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 1806.

The world's average unit value of chocolate imports into Norway was about 6 100 per tonne in 2021 and has increased by around 12% since 2017 (Figure 5-32). Chocolate imported from the EU in 2021 had a unit price above as well as below the world's average. Sweden for example had a unit value of about EUR 4 600 per tonne. The unit value of chocolate imported from Germany was higher at about EUR 6 600 and from Belgium a bit lower at EUR 5 000.

Figure 5-32: Per unit value of Norwegian imports of chocolate confectionery for selected countries, 2017-21 (EUR per tonne)

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 1806.

EU GI products

As noted in section 4.2.4, Norway does not participate in the EU GI registration system for agricultural products and foodstuffs, as agriculture is not included in the EEA Agreement. As a result, registration is required in the national GI system of Norway, which is called Beskyttede betegnelser. Currently, no chocolate confectionary from the EU is registered under the Norwegian GI system.

Main competitors

The market is dominated by international players who produce their products in Norway. Even though domestic production is comparatively small it does largely cover domestic demand. The market is strongly dominated by Mondelez Norge AS and Orkla Confectionery & Snacks Norge. However, Conaxess Trade Norway AS, and Norge AS are strong competitors as well. Artisanal producers are competitors in particular for premium products from the EU.

When it comes to imports, the EU is the most important source of chocolate confectionery in Norway. However, it still has to compete with non-EU suppliers including the UK, Switzerland, and the US.

5.7.4 Specific market entry requirements

Market access and custom procedures

Preferential trade with the EU and Norway is ruled by article 19 of the EEA Agreement. The Norwegian food and veterinary legislation is harmonised with the EU, and import requirements are generally also the same as in the EU. However, the EEA Agreement does not cover the EU common agriculture and fisheries policies or direct and indirect taxation.

In addition to the general documentation requirements that are listed in Table 4-1 certain supplementary documents are needed. These include a notification to deal in agricultural goods and a registration of importers with the Norwegian food safety authority (Mattilsynet). Most documents can be in English or Norwegian.

Most products have tariffs of 0%, which is better than the MFN. However, in addition an agricultural component is applied depending on the raw materials contained in the product. The actual duty rate is calculated individually by the Directorate of Agriculture.

One major barrier relating to the trade of agricultural goods from the EU to Norway affecting chocolate confectionery stands out. EU export possibilities in processed agricultural products to Norway remain significantly impacted by high custom tariffs based on the EEA Agreement.

Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:

Main page – select product, country of origin and destination country:

<https://trade.ec.europa.eu/access-to-markets/en/home>

Example link – chocolate confectionery (1806) from Germany to Norway

<https://trade.ec.europa.eu/access-to-markets/en/search?product=1806&origin=DE&destination=NO>

SPS measures

There are currently no specific SPS related challenges concerning dairy products. More information can be found in section 4.3.4.

Standards

As a member of the EEA, Norway conforms with EU Regulation 178/2002 (General Food Law), which is the harmonized regulation setting out the general principles and requirements of the EU's harmonized food law. More information can be found in section 4.2.2.

Labelling

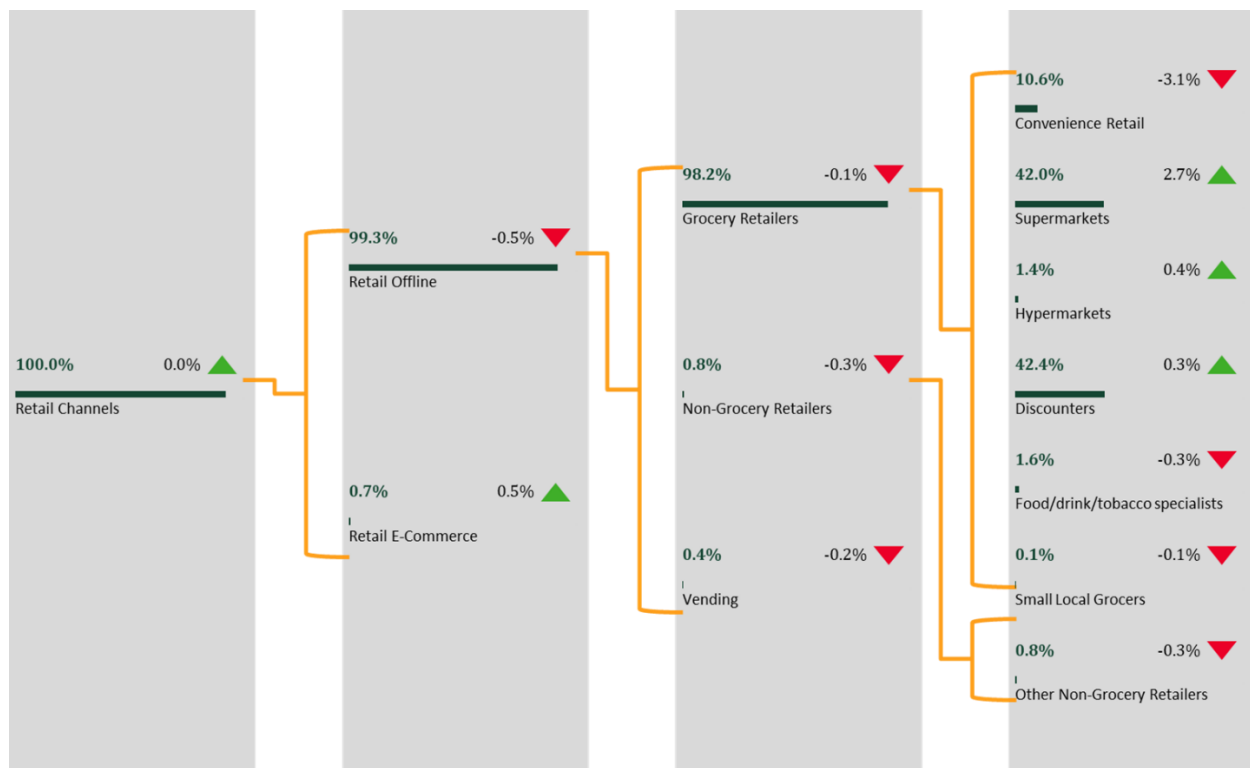
The EU's legislation on general labelling and nutritional labelling is applied in Norway. EU requirements regarding food labelling are laid out in the FIC Regulation (EC) 1169/2011. Labels must be either in Norwegian, Swedish, Danish and sometimes Finnish language. More information on labelling can be found in section 4.2.3.

5.7.5 Distribution

As shown in Figure 5-33 chocolate confectionery is nearly exclusively sold through store-based retailing (offline), with a low percentage being sold via vending machines and internet retailing. Even though its retail value remains very low, the importance of internet retailing has increased from 0.2% to 0.7% between 2017 and 2021. A major obstacle to retail sales is that consumers are not interested to wait for delivery, as most of them purchase chocolate on impulse. Discounters (42.4%) and supermarkets (42.0%) are the main channels, followed by convenience retail with 10.6%. The popularity of supermarkets and discounters has been increasing during the last few years, whereas the popularity of convenience retail decreased. Convenience retail and foodservice are expected to be boosted in the next years because consumers go back to more active lifestyles after the COVID-19 pandemic.

Chocolate confectionery is almost entirely distributed through retail channels. On-trade channels, led by restaurants and cafes, account for only 3% of chocolate sales by volume (retail channels account for 97%). There are a few restaurants which create dessert dishes based on certain specific chocolate products (Belgian chocolate being among the most prevalent).

Figure 5-33: Distribution channel overview of chocolate confectionery in Norway (2021); retail value



Source: Euromonitor International: Packaged Food, 2022.

5.7.6 Challenges for EU products

Overall, the Norwegian market for chocolate confectionery products offers good opportunities for the EU. The EU accounts for more than 90% of chocolate confectionery imports into Norway by value; and ultimately Norway has a structural deficit in this product.

That said, the dominance of large domestic and international manufacturers in the chocolate confectionery market is one of the biggest challenges for EU producers. In addition, competition from non-EU countries such as the UK and Switzerland is also a challenge. With the EU being known for its higher-end chocolate products, an important competitor is domestic craft production which is highly regarded in Norway. The craft chocolate market in Norway continues to grow. Nevertheless, EU craft chocolate producers might be able to compete if they for example utilise ingredients that are popular with Norwegian consumers such as liquorice.

The increasing health consciousness of consumers is challenging for the chocolate confectionery market as a whole; however, the introduction of healthier options may address these concerns. Price-wise, inflation could be a challenge in particular for lower-income consumers. Prices for chocolate confectionery are increasing and thus lower-income consumers have less access to higher quality more expensive products from the EU.

As transparency is important to Norwegian consumers, it is important for manufacturers to provide products with very clear labels that depict as much information as possible. Sustainably and ethically produced chocolate products are also favoured by Norwegian consumers.

Market Takeaway: Chocolate confectionery

Consumption: *The chocolate confectionery market was worth about EUR 650 million in 2021. The market is forecast to decline in coming years, whereas it increased during the previous last years.*

Competition: *The market is dominated by large international and domestic companies such as Mondelez Norge AS and Orkla Confectionery & Snacks Norge. Artisanal producers are competitors in particular for premium products from the EU. The main non-EU competition comes from the UK, Switzerland and the USA.*

Distribution: *Nearly exclusively through store-based retailers such as supermarkets and discounters. Convenience retail and e-commerce are forecast to grow in popularity.*

Challenges: *To compete with big domestic and international companies which produce domestically, and with local craft producers. The rising health consciousness of consumers. The need to provide transparent labelling. Inflationary pressure on prices.*

Opportunities: *New flavours and other innovations. Premium chocolate products that are healthy and produced sustainably and ethically. E-commerce as a distribution channel.*

5.8 Beer

5.8.1 SWOT analysis

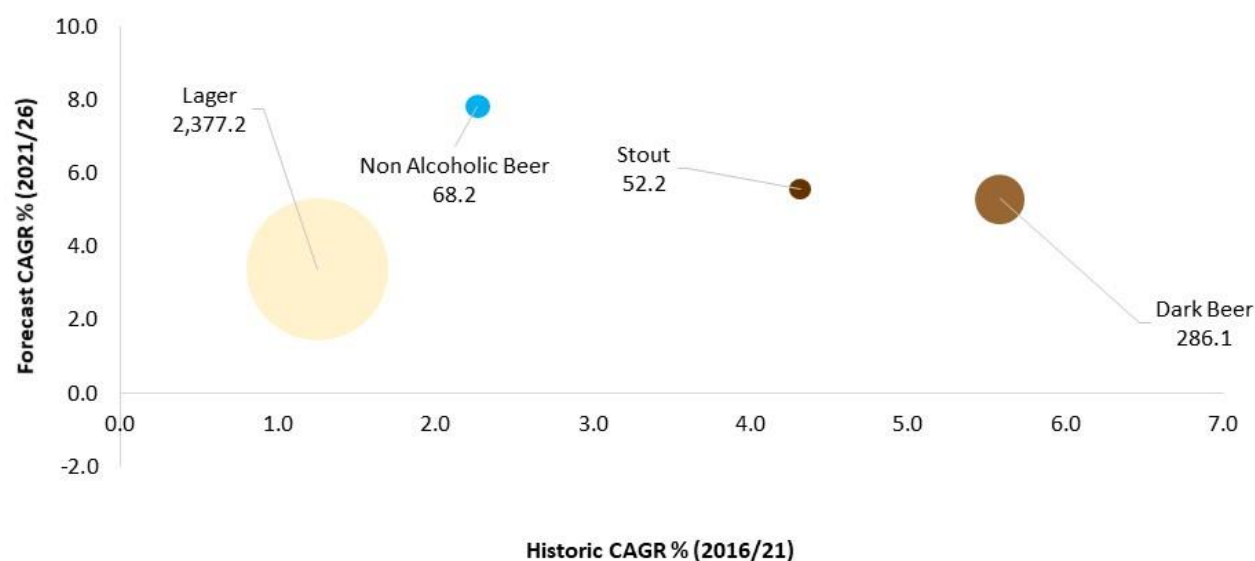
STRENGTHS (+)	WEAKNESSES (-)
▪ The EU accounts for the majority of beer exports to Norway. ▪ Beer is often the first alcoholic beverage young consumers encounter due to Norway having lower legal age for beer than other alcohol consumption. ▪ Consumers generally opt for an EU beer when seeking a high-quality beer in Norway.	▪ A ban on the advertising of beer. ▪ Only <i>Vinmonopolet</i>, the state-run retailer, can legally sell beer with alcohol content above 4.75%, and it operates under restricted hours by design to discourage consumption. ▪ The on-trade sector which is a key distributor of EU beers only accounted for half its distribution share of beers in 2021 compared to pre-COVID-19.
OPPORTUNITIES (+)	THREATS (-)
▪ Rise in demand for low-no alcohol beers as well as gluten-free beers. ▪ Rise in demand for beers with a fruit taste and scent such as a mango or pineapple IPA. ▪ Renaissance of dark beers, creating interest in a wide range of non-lager products; plus the pairing of beer with food.	▪ Domestic brewers are expanding their production capacities. ▪ The UK, the US and Mexico are the three biggest competitors from outside the EU. ▪ Consumers are very brand loyal due to the high price of beer in Norway.

5.8.2 Consumption

Evolution of consumption

As observed below in Figure 5-34, lager is by far the largest type of beer in Norway with a value of EUR 2.3 billion. Lager is predicted to grow by a CAGR of 3.4% between 2021 and 2026. This is followed at a distance by dark beer with a value of EUR 286 million. Non-alcoholic beer has been the fastest-growing beer segment in recent years, growing by a CAGR of 2.3% between 2016-2021. It is forecast to grow even faster, at a CAGR of 7.5% between 2021 and 2026. Stout is the lowest-valued beer segment with a value of EUR 52 million. Although it is expected to grow fast, by a CAGR of 5.5% between 2021 and 2026, it will still remain the lowest-valued beer category in Norway by 2026.

Figure 5-34: Evolution and forecast of the beer market in Norway, 2016-2026; value (EUR million)



Source: Euromonitor International: Alcoholic Drinks, 2022.

Consumers

Consumption of beer in Norway stands at 51 litres per capita, which is roughly in line with per capita consumption rates seen in other Nordic countries. Beers have the advantage of being legally available to consumers at the age of 18, which is two years younger than the legal drinking age for spirit drinks; this means consumers often drink beer as their first alcoholic beverage although wine is also legally accessible from the age of 18. In volume terms, it is the most popular alcoholic drink in Norway accounting for around 2/3 of sales. Men are much greater consumers of beer than women – it is estimated that the average man consumes around four times the volume of beer as the average woman in Norway. The average beer consumer also skews young, with 18-34 year olds consuming greater per capita volumes than any other age group (and indeed around 1.5 times the volume consumed by 55 to 64 year olds, and over twice the volume consumed by over 65s). This can be largely attributed to the combination of the lower drinking age for beer (18) and the lower average income of the younger age group.

Beer is expensive in Norway: a pint of beer (approximately 0.5 litre) in an on-trade outlet can cost anywhere between EUR 7 for a domestic beer to EUR 10 for an imported (often EU) beer; and up to half the price of a pint constitutes government tax. For this reason, it is likely that consumers of imported beer will be of a middle-higher income class, as lower income earners will be more likely to consume domestic beer which is less expensive. This is particularly the case for premium and craft EU beers. Consumers of EU beer tend to be urban, as rural consumers have a preference for consuming traditional spirit products such as Akvavit which is often accompanied by a domestic beer instead of an imported beer. Tourists are a key market for EU-imported beers, particularly in cities which receive a lot of tourism and business from the EU such as Oslo, Bergen and Trondheim. Similarly, immigrants of European origin (which make up around 7% of the population) are an important group.

Drivers and method of consumption

Key drivers of beer consumption mirror patterns seen in other European countries such as the desire to socialise, relax and for taste. A famous expression in Norway is that “*there is no point in being half drunk*” which is reflective of the expensive price of beer in the country and the less occasions on which it is consumed; in this regard, it is quite common for Norwegians to drink a larger amount of beer in one sitting rather than a smaller amount over several days. The average serving of beer in bars comes in the form of a half pint (0.25 litre) which is also the norm in many other European countries. Norwegians seeking beers of a higher alcohol content off-trade are restricted to visiting the state-run retailer *Vinmonopolet* (often just referred to as *polet*) as any alcoholic beverage with an alcohol content above 4.75% can only be sold there; furthermore, by design, *Vinmonopolet* operates under restricted working hours (typically closing at 6 pm). Indeed, it should be noted that many producers specifically ensure their beer contains under 4.75% alcohol so that their products are not only restricted to *Vinmonopolet* outlets.

Dark beer traditionally is a product which is consumed around Christmas. Traditionally these beers – called *Juleøl* – were made with high alcohol content (6.5% or higher). However, with the 1993 introduction of legislation restricting sales of products with alcohol content above 4.75% to *Vinmonopolet*, many dark beers have subsequently been reformulated to under 4.75%.

Purchase criteria

As mentioned above, beer is expensive in Norway due to a combination of a high VAT rate (25%) and a government tax on alcohol. Due to this, consumers tend to be quite brand loyal to ensure they are getting value for their money. Consumers who value convenience will opt for a beer with a lighter alcohol content of less than 4.75%, due to the ability to purchase these beers in any retailer of their choosing rather than being restricted to the *Vinmonopolet* and the inconvenience of its restricted opening hours. This also results in consumers being forced to purchase beers of a lower alcohol content during the evening at retailers. Consumers are typically well aware of the larger EU beer brands, with many consumers being loyal to them even if they are quite expensive due to being associated with quality. Beer is largely treated as a product which should be of a high quality standard due to its price.

Beer on retailers’ shelves in Norway

Unlike stronger drinks, beers can be found in normal retailers if their alcohol content is below 4.75%. It is nonetheless possible to find beers in *Vinmonopolet* stores as well; and of course it is the only possible channel of distribution in the case that alcohol content is above 4.75%.

In terms of pricing:

- Economy products sell for under NOK 60 (EUR 5.50) per litre
- Mid-range products retail for NOK 60 to 90 (EUR 5.50 to 8.20) per litre
- Premium products sell for above NOK 90 (EUR 8.20) per litre



Above: beer in Vinmonopolet. Many contain alcohol above the 4.75% level. Unlike in some other outlets, the products tend to be sold unchilled and often individually, with an extensive range available. Below: beer selection in a large supermarket chain. Multipacks are common.



On balance, glass bottles are slightly more popular than metal beverage cans. The most common size for bottles is 330ml, though some 500ml bottles can also be found. For metal beverage cans, 440ml and 500ml are the norm. While bottles are generally sold individually in *Vinmonopolet* outlets, it is common to find multipacks (generally 6, sometimes 4 packs) in other retail outlets. Products may also be sold chilled in general retail outlets. Overall, the range/variety of products available is greater in *Vinmonopolet* outlets, not least due to the ability to sell beers above 4.75% in alcoholic volume.



Above: beer in a smaller retailer. It is often sold both in multipacks and chilled. Below: discounters tend to offer products in multipacks.



Photos © Euromonitor International / Agra CEAS, 2023.

Recent market trends

Many of the larger recent market trends in Norway mirror those seen in other European countries such as increasing demand for low and no alcohol beers and the rise in health consciousness. Overall the most important market trends include:

Return to cross-border trade

As is the case with other alcoholic beverages, Norwegians are well known for travelling to Sweden or Denmark to shop cheaper beers, with the term “*Harry Tur*” often used to describe this process. A large number of Norwegians live within the vicinity of Sweden which allows them to drive across

the border and purchase cheaper beers to bring home. While this behaviour does not necessarily directly impact EU beers imported to Norway, it does allow consumers to be more experimental with the beers they purchase in Sweden or Denmark leading to the possibility of developing a preference for an EU beer.

Health trend and rise in demand for no-low alcohol beers

The health trend will continue to boost demand for non-alcohol and low-alcohol beer, in addition to lighter alcohol content beers. The launch of higher quality products, a wider product offer and wider distribution due to the ability of these beers to be sold in most retailers will be key to this. Positioned within the premium and above price points, the segment will continue to provide opportunities for growth over the forecast period.

A further impact of the health trend is an increase in demand for gluten-free beer, with several gluten-free products being launched in recent years.

Rise in demand for fruity beers

A number of the larger brewers in Norway have adapted their products to incorporate a more fruity taste in recent years after this has proved popular amongst consumers in the country. IPAs such as mango or pineapple flavour have emerged in the market in recent years and have proved to be successful. Going forward, lager will remain the most popular beer in Norway, although beers with a fruity taste will be amongst the fastest growing in popularity.

Dark beer renaissance

As noted above, dark beer has traditionally been a product (*Juleøl*) with alcohol content above 6.5% with consumption occurring around Christmas. However, it is now produced in various flavours and forms such as IPA and stout. Breweries, both local and foreign, are also experimenting with spices to deliver more flavour. Innovation in flavour is making the product appeal to a larger consumer base and this helps explain the strong growth rate of dark beer, both historically and going forwards. At the same time, the range of beers targeting the Christmas market has expanded to include types beyond the traditional dark beer. It was recently estimated that there are around 250 varieties of Christmas beer available in Norway.

Food and beer pairing

The pairing of food and beer is an emerging trend in Norway as consumers start to look for unique combinations. Certain food service outlets are leading the way in this trend. Examples which can be found in Norway include: Belgian double beers paired with certain cheeses; and IPAs paired with some spicy dishes. This trend is, however, so far largely reliant on the beer producer seeking out a suitable food service outlet to partner with.

5.8.3 Offer

Domestic production

The Norwegian beer market is largely dominated by two producers: Carlsberg-Rignes (based in Oslo and Copenhagen), and the smaller but significant producer Hansa Borg which is based in Bergen and Sarsborg. Collectively, these two producers account for roughly 72% of the Norwegian beer market by volume. The most popular style of beer produced in Norway is a pilsner-style lager which is also the most common beer brewed in other Nordic countries.

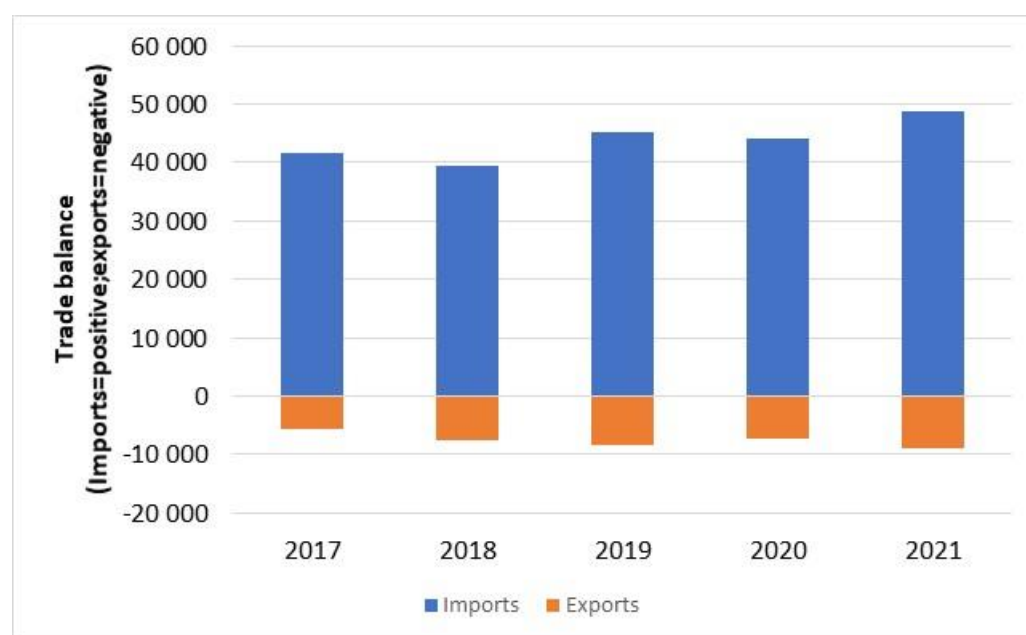
In 2021, Norway produced just under 250m litres of beer (233m litres alcoholic and 12m litres

non-alcoholic). This volume is a reduction on 2020 volumes, but growth is expected to return in the short term. Production of non-alcoholic beer in particular has grown in recent years. Most beer production is based around the country's larger cities such as Oslo, Bergen and Stavanger. There are several craft brewers in the country, but it is difficult for them to expand rapidly as the costs of operating in Norway are large. Coupled with the high costs, Norway operates a "pay-to-play" system whereby brewers must pay to get their beer on the taps of most bars, to provide all the systems required for pulling a beer, including tanks, taps, and glasses. This poses a large barrier to entry for new brewers seeking to enter the market.

Imports and exports

As shown below in Figure 5-35, Norway is by far a net importer of beer. Imports of beer have grown in recent years from a value of EUR 41 million in 2017 to EUR 48 million in 2021. Although exports are much lower, they have also increased, from EUR 5.7 million in 2017 to EUR 8.9 million in 2021.

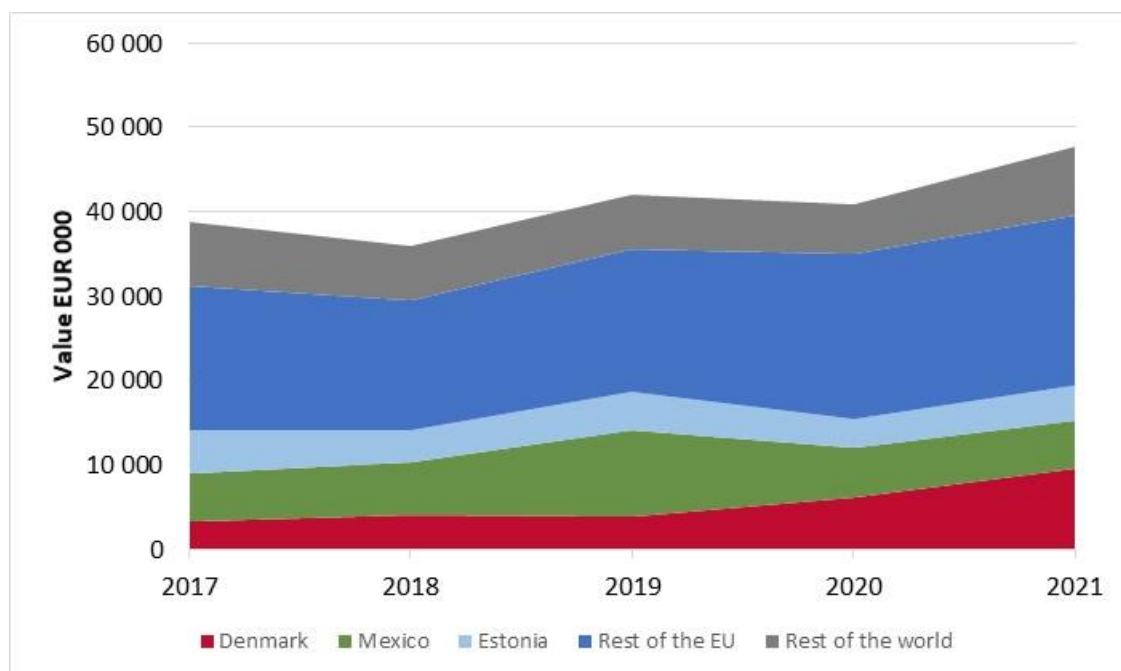
Figure 5-35: Trade balance (imports and exports) of beer in Norway, 2017-21 (EUR 000)



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 2203.

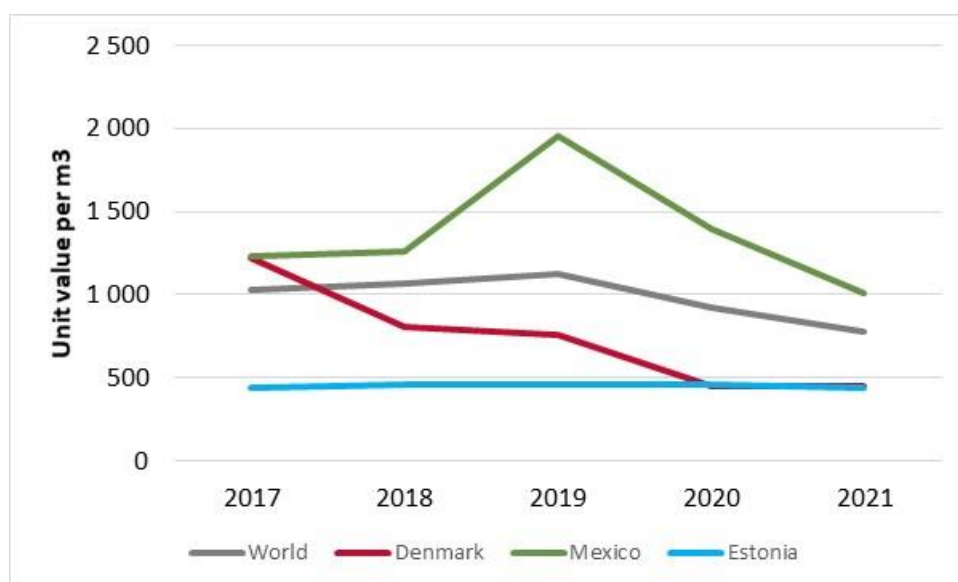
Figure 5-36 shows that Denmark is the largest exporter of beer to Norway with a total value of EUR 9.5 million in 2021. Mexico is the second-largest exporter of beer with a total value of EUR 5.7 million, followed by Estonia with a value of EUR 4.1 million. Other large exporters from the EU include Germany (EUR 3.9 million), Italy (EUR 3.7 million) and Belgium (EUR 3.4 million).

Figure 5-36: Norwegian imports of beer by country, 2017-21 (EUR 000)

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 2203.

Figure 5-37 shows the per-unit value of Norwegian beer imports. Mexico has become the exporter with the highest unit value of EUR 1 000 per m³. This is followed at a distance by Denmark and Estonia with similar unit value levels (respectively, of EUR 449 and EUR 440), which is well below the world average (EUR 775).

Figure 5-37: Unit value of Norwegian imports of beer for selected countries, 2017-21 (EUR per m³)

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 2203.

EU GI products

As noted in section 4.2.4, Norway does not participate in the EU GI registration system for agricultural products and foodstuffs, as agriculture is not included in the EEA Agreement. As a result, registration is required in the national GI system of Norway, which is called Beskyttede betegnelser. Currently, no beer from the EU is registered under the Norwegian GI system.

Main competitors

The biggest competitor in the Norwegian market comes from domestic brands although domestic branded beers tend to be more attractive for low-income earners due to the cheaper (although still high) price of domestic beer products. In targeting middle-higher income earners, EU beers have a clear foothold in the Norwegian market due to being regarded a quality product. While Mexico is the second largest exporter of beer, the brand Corona accounts for a large share of this export and is quite distinctive in its taste when compared to the EU pale lager. Other large non-EU exporters of beer to Norway include the UK, the US and Thailand although exports from these countries are far behind the larger EU beer-producing countries.

5.8.4 Specific market entry requirements

Market Access and Entry

The customs procedures for importing foodstuffs are set out in section 4.2.1. A full list of the general documentary requirements for export set out in Table 4-1, along with requirements by product category in Table 4-2. EU exporters are not subject to a tariff when exporting beer to Norway, a notable advantage over other exporters subject to a tariff rate of NOK 1.28 per kg (EUR 0.12).

Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:

Main page – select product, country of origin and destination country:

<https://trade.ec.europa.eu/access-to-markets/en/home>

Example link – general beer category (2203) from Belgium to Norway

<https://trade.ec.europa.eu/access-to-markets/en/results?product=22030030&origin=BE&destination=NO>

Standards, SPS measures labelling

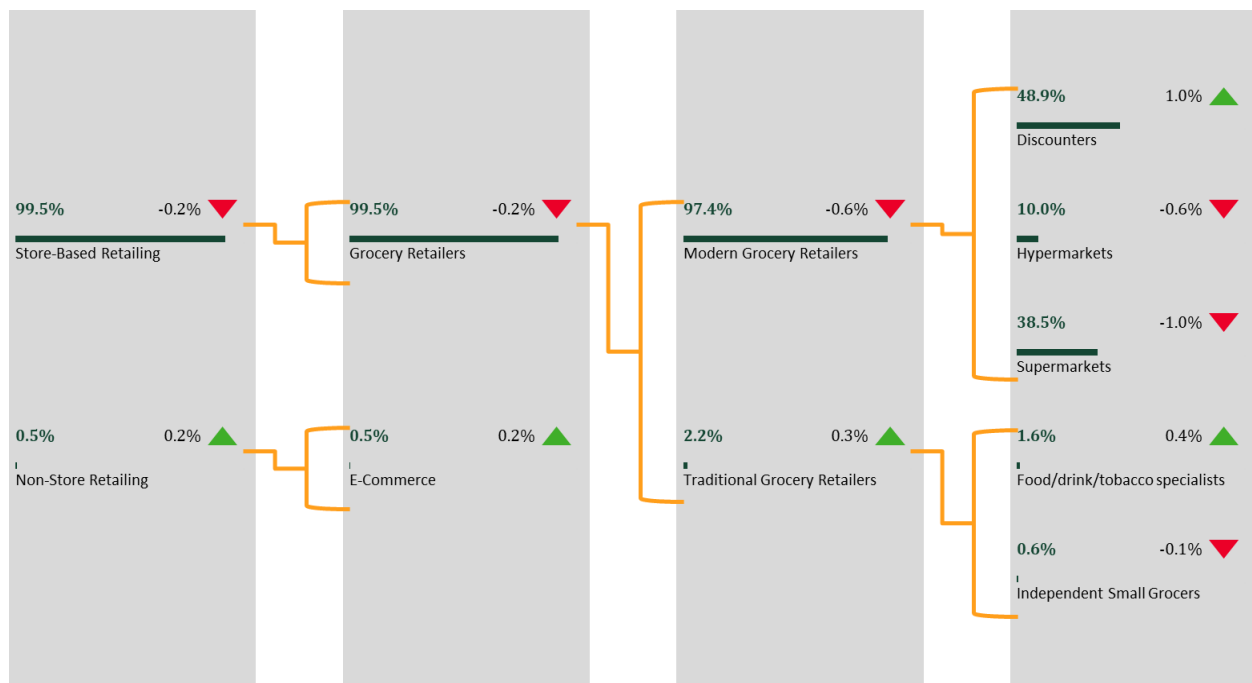
Regulations about requirements, prohibited substances not allowed for use in these products, quality requirements etc. are mostly the same as in the EU due to effort to harmonised Norwegian food safety requirements with EU legislation. It is the responsibility of the importer that the imported foodstuff is safe for human consumption and that the labelling and the content comply with Norwegian food regulations. The products must be labelled in Norwegian or in a language

that resembles Norwegian (Swedish or Danish are the only generally accepted alternatives). Article 16 of the EU FIC Regulation states that the declaration of the list of ingredients is not mandatory for beverages containing more than 1.2 per cent of alcohol by volume, generally however beer producers in Norway will publish their list of ingredients.

5.8.5 Distribution

As shown in Figure 5-38, modern grocery retailers account for the absolute majority of off-trade beer sales in Norway; this is helped by the presence of *Vinmonopolet* which is the only retailer legally allowed to sell beer with an alcohol content above 4.75%. Discounters account for 48.9% of sales which is helped by consumers seeking cheaper beers in an expensive market. Supermarkets account for 38.5% of sales followed by hypermarkets which account for 10% of sales. Traditional retail outlets account for just 2.5% of sales while e-commerce accounts for a smaller percentage at 0.5%. The off-trade sale of beer accounted for 90% of all beer sold in Norway in 2021 with the remaining 10% being sold in the on-trade sector via bars or nightclubs. Prior to the outbreak of COVID-19, the on-trade share of sales stood at 18.7% in total.

Figure 5-38: Distribution channel overview of beer in Norway (2021); off-trade volume



Source: Euromonitor International: Alcoholic Drinks, 2022.

5.8.6 Challenges for EU products

The Norwegian beer market is challenging for several reasons. Firstly, the advertising of alcohol in Norway is forbidden on all communication platforms which makes it exceptionally difficult for new arrivals in the market to target consumers, although this is also true for domestic producers. Secondly, the sale of alcohol in Norway is heavily restricted, for beers with an alcohol content above 4.75% they must only be sold via the state-run retailer *Vinmonopolet* which operates at restricted hours on purpose to dissuade consumers. Many producers entering the Norwegian

market will adapt their products to be below the 4.75% alcohol content threshold, which allows full access at any of the country's retailers. Consumers in Norway are also very brand loyal as a reflection of the high cost of beer in the country; this makes it difficult to attract new consumers and quiet often new consumers of EU beer in Norway will have had their first point of consumption in a different country where the price of beer is cheaper which allows for more experimentation. Indeed, the Norwegian market is dominated by two large domestic producers which account for over 70% of beer sold in the country. This is, in fact, a challenge that smaller craft producers have been facing in recent years – and generally the way round it is to be competitive on price as well as on product quality and taste.

Finally, cross border trade has been a long-term threat that Norway, with those living in the south-east of the country particularly likely to drive to Sweden in order to source their beer more cheaply, with beers in Sweden being almost half the price in some cases. While this cross-border trade had ceased during COVID-19, it has now returned.

Market Takeaway: Beer

Consumption: *Consumption per capita is in line with other Nordic countries. Younger consumers often drink beer as their first alcoholic beverage, as the legal age to purchase beer at age 18 is two years less than spirits(although wine is also available from the age of 18). Consumers of EU-imported beers are likely to be urban middle-higher-income class who are willing to spend a little bit extra on what is already an expensive product in Norway.*

Competition: *Domestic beers are the main competition, although larger EU beer brands are well-known and respected for their quality in Norway. Domestic beers are also well respected but consumers seeking an exceptionally high-quality beer will often choose an imported EU beer. Imports from Mexico, the UK and the US present a competitor for EU beers, although the EU accounts for the absolute majority of Norway's imports of beer.*

Distribution: *Vinmonopolet has the overwhelming share of retail sales of alcoholic beverages in Norway accounting for 97.4% of beer sales. The on-trade sector accounts for 10% of sales which is roughly half the amount it accounted for prior to COVID-19.*

Challenges: *A ban on alcohol advertising coupled with restrictions surrounding the sale of certain beers with a high alcohol content are the two biggest challenges in the Norwegian market. The high price of beer in the country encourages brand loyalty making it additionally difficult to market to new consumers, and encourages cross-border trade.*

Opportunities: *The rise in demand for low-no alcohol and gluten-free beers and beers with a fruity taste or scent present the larger opportunities for targeting Norwegian beer consumers. There are also smaller opportunities around the renaissance of dark beer and the pairing of beer with food.*

5.9 Sugar confectionery

5.9.1 SWOT analysis

STRENGTHS (+)	WEAKNESSES (-)
- Norway is a net importer of sugar confectionery. - The EU accounts for around 88% of the imports market value. - Sugar confectionery is consumed by most consumer groups.	- The market size of the sugar confectionery market is forecast to decline. - Norway is a rather small market for sugar confectionery compared to other countries. - Consumers cross border shopping habits.
OPPORTUNITIES (+)	THREATS (-)
- Medicated confectionery, mints, and gums are forecast to grow. - Healthier and functional sugar confectionery. E.g. sugar-free, vegan, with natural colourings, gluten free, enriched with vitamins. - E-commerce continues to grow in popularity (albeit from a low base) and thus offers new opportunities.	- The market is dominated by Nordic and domestic players. - Some competition from non-EU suppliers (mainly the UK, China, and Turkey). - The increasing health-consciousness of consumers.

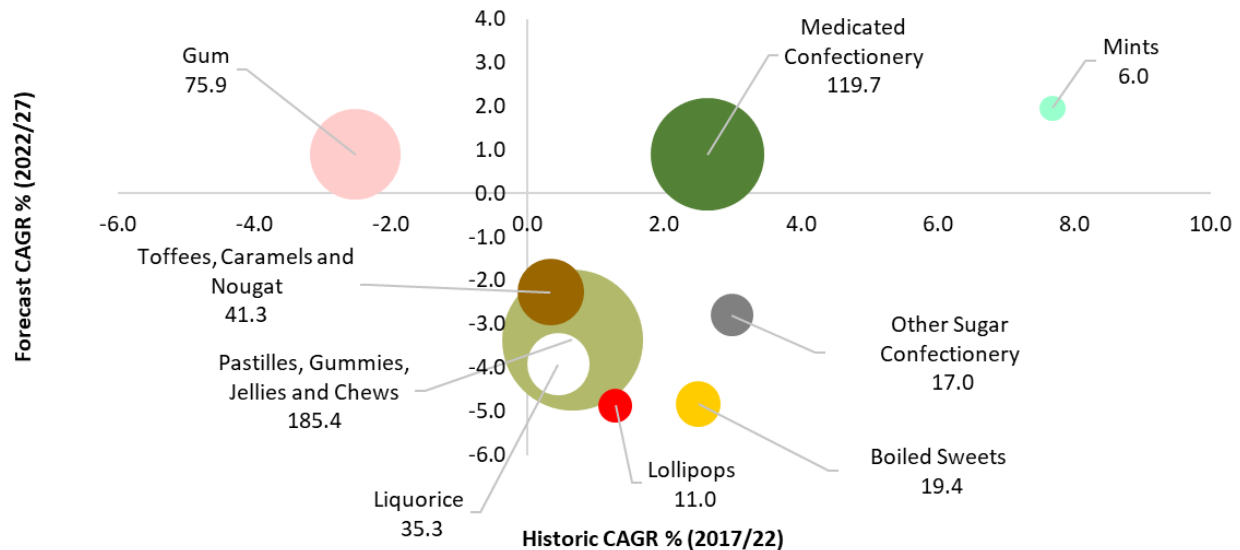
5.9.2 Consumption

Evolution of consumption

In 2022 the total market size of the sugar confectionery market in Norway was about EUR 511 million. As shown in Figure 5-39 the biggest market segment is for pastilles, jellies, gummies, and chews with a size of about EUR 185 million, followed by medicated confectionery with close to EUR 120 million. Gum was the third biggest market with around EUR 76 million. The market size for toffees, caramels and nougats was over EUR 41 million and liquorice had a market size of about EUR 35 million. Boiled sweets had an approximate market size of over EUR 19 million, followed by other sugar confectionery with EUR 17 million, lollipops with about EUR 11 million, and mints with around EUR 6 million.

Historically, the chocolate market has been growing in the last few years. Between 2017 and 2022 mints showed by far the highest CAGR at 7.7%. This was more than double the growth of other sugar confectionery at about 3.0%. Medicated confectionery grew at a historic CAGR of around 2.6% between the same years, and boiled sweets at over 2.5%. The CAGRs of the remaining categories ranged between 0.3% and 1.3%. Only gum had a negative growth rate of 2.5%. The forecasted growth looks very different from historic growth, as the chocolate market is forecast to decline for most categories and to slow down for a few categories. Between 2022 and 2027 the market size of mints is forecast to grow at the highest CAGR of 2.0% and medicated confectionery, as well as gum at the second-highest at around 0.9%. This means gum is the only category with a better growth forecast as the market for the category historically declined.

Figure 5-39: Evolution and forecast of the sugar confectionery market in Norway, 2017-2027; total retail value (EUR million)



Source: Euromonitor International: Packaged Food, 2022.

Consumers

Norwegians eat around 4.1 kg of sugar confectionery per capita each year. Consumers of sugar confectionery come from all parts of society because everyone enjoys a treat now and then, no matter their status or age. In particular children love sugary sweet treats such as boiled sweets or Lollipops, whereas adults are more likely to be interested in more functional sugar confectionery, such as gums, mints or medicated confectionery. Liquorice is part of the Norwegian culture and is highly popular with the majority of consumers. Health-conscious consumers tend to prefer healthier varieties.

Drivers and method of consumption

Sugar confectionery has been positively impacted by the COVID-19 pandemic in 2020 and 2021. During this time consumers spent more time at home than previously which boosted sugar confectionery at home consumption for indulgence reasons. Furthermore, consumers were not able to go shopping across the border in Sweden which made them purchase sugar confectionery domestically. Another driver was the abolishment of the sugar tax in 2021 which made sugar confectionery prices drop and thus encouraged consumers to buy products on the domestic market. However, the change in the sugar tax only led to an increase in volume terms and not in value terms.

With the reopening of the Swedish border and people going back to their pre-pandemic lifestyles sugar confectionery is negatively impacted. People spend more time outside of their homes and are busier than during times of the COVID-19 pandemic and thus indulge less. Some consumers also return to cross-border shopping because sugar confectionery remains cheaper in Sweden despite the abolishment of the sugar tax. After all, prices started to increase again – although

from a lower baseline. Cross-border trade is forecast to increase in 2022 and 2023 but stabilise at a lower than pre-pandemic level partly because of reduced domestic prices.

Due to consumers going back to busier lifestyles, the demand for convenient on-the-go products is increasing because consumers need small snacks during their days to e.g. get their blood sugar up. Mints and gums for example are increasing in demand because consumers now are partly back in their offices and spend more time with people, which is why having a fresh breath becomes more important again. Moreover, Norwegian consumers are highly health conscious, which drives the demand for medicated confectionery that can be used to relieve a sore throat for example. Even though they do it less often, Norwegian consumers continue to buy sugar confectionery as a sweet treat to indulge in.

Pick-and-mix shops are popular in the country. Instead of purchasing pre-packaged candy, consumers can mix their own bags of sweets and pick from open boxes with a small shovel. These shops allow them to choose different flavours and textures in a fun way. In the end, the price is determined according to the weight of the sugar confectionery. However, pick-and-mix sales are forecast to decline due to the competition from the Swedish market as consumers go back to cross-border shopping. This forecast also has negative implications for the development of private label products.

Liquorice, called '*lakris*' in Norwegian, is a sugar confectionery that stands out in Norway. It is not commonly eaten throughout the world, but many Norwegian consumers love it. It can be found across the country in sweet, salty and spicy varieties. It is part of the Norwegian culture.

Purchase criteria

The price plays an important role for Norwegian consumers, which is shown by the fact that many consumers purchase sweet confectionery across the border in e.g. Sweden because of lower unit prices.

The type of sugar confectionery and the taste are important criteria as well. By volume, pastilles, gummies, jellies and chews are the consumers' favourite choice. This is followed by liquorice and then by toffees, caramels and nougat, medicated confectionery, boiled sweets, mints, and lollipops. The occasion for which a product is bought often decides which type consumers choose. For example, consumers who want fresh breath are likely to choose gums or mints, whereas consumers who want indulgence rather choose toffees, caramels, and nougat. Each type is preferred for a different reason.

The packaging plays a role as well. Currently, consumers prefer smaller pack sizes because of their convenience, in particular when they are on the go. For home consumption, consumers might prefer to purchase larger packs as those are usually better value for money.

Health-conscious consumers are likely to prefer smaller pack sizes in general because they consider too much sugar confectionery to be unhealthy. Health-conscious consumers are likely to purchase sugar products with lower sugar content or enriched with vitamins.

Recent market trends

The following recent market trends for sugar confectionery stand out:

- **Health trend:** Norwegian consumers are very health conscious and this further increased during the COVID-19 pandemic. As a result, many consumers look for healthy snacking options. Some of them opt for smaller pack sizes because they aim to eat less, whereas others look for lighter or functional products. Thus, opportunities exist for manufacturers

of healthier sugar confectionery varieties containing fewer calories than regular candy, are sugar-free, vegan, use natural colourings, are gluten free, and/or are enriched with vitamins including vitamin B2, B6 and zinc. So far examples are limited and mainly only exist in the power mints space. One other example is the deBron brand which offers sugar-free mint toffees and salt liquorice.

- **E-commerce:** Even though this distribution channel remains a niche it is forecast to experience the most dynamic growth. Large players such as Oda.no, Norgesgruppen's online stores, offer many different sugar confectionery products similar to those offered in stores. Online shopping is more convenient, which is why it is likely that more consumers will make the switch in the future. Consumers who shop for their groceries online are likely to also add sugar confectionery to their orders. Thus, the online channel might offer more opportunities in the future for manufacturers to explore.

5.9.3 Offer

Domestic production

The Norwegian sugar confectionery market is currently dominated by the Swedish company Cloetta Norge AS, which has a market share by value of close to 25% due to its Candyking, Malaco, Läkerol, Ahlgrens, and Cloetta brands. Cloetta has been founded in 1862 and is a leader in confectionery not just in Norway but all over Northern Europe. Even though Cloetta has seven factories, none of them is situated in Norway.

Orkla Confectionery & Snacks Norge, which is a domestic company has a market share of over 23% mainly because of its popular Nidar brand. Conaxess Trade Norway AS, which is a trading company, has a market share of 13%. It sells international brands such as Fisherman's Friend, Ricola, and Mentos on the Norwegian market. Norgesgruppen ASA with its close to 11% market share is another domestic company popular in Norway. Its private label Smågodt is well known.

Pick-and-mix sugar confectionery is highly popular in Norway. The leading players in this field are Smågodt, Candyking and Nidar Smågodt.

Even though not many artisanal sugar confectionery shops exist, the Danish artisanal luxurious liquorice candy from Lakrids by Johan Bulow is popular in Norway.³⁸ Three stores are located in Oslo and one in Bergen.³⁹

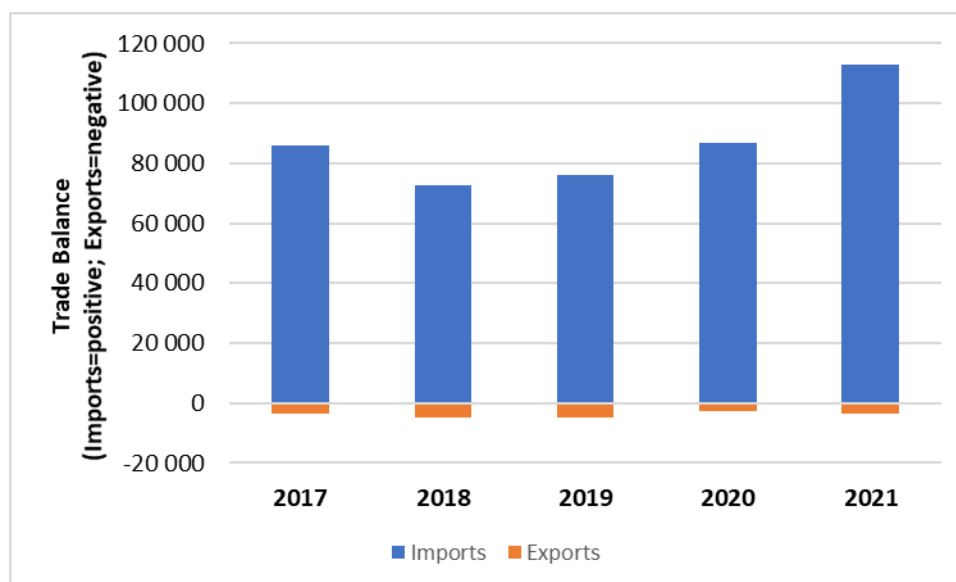
Imports and exports

Figure 5-40 shows that Norway is a net importer of sugar confectionery. In 2021, imports of sugar confectionery were worth EUR 113 million, whereas exports were worth just over EUR 3 million. This means Norway imported close to 38 times more than it exported in the same year. Since 2019 the value of imported sugar confectionery increased by EUR 37 million when compared to 2021. The value of the export market has been fluctuating and was highest in 2019; between 2017 and 2021 it overall decreased by approximately EUR 400 000.

³⁸ Norway's obsession with licorice, <https://sunnygandara.com/norways-obsession-with-licorice/>

³⁹ Find a store, <https://lakridsbybulow.com/stores#/>

Figure 5-40: Trade balance (imports and exports) of sugar confectionery in Norway, 2017-21; EUR 000



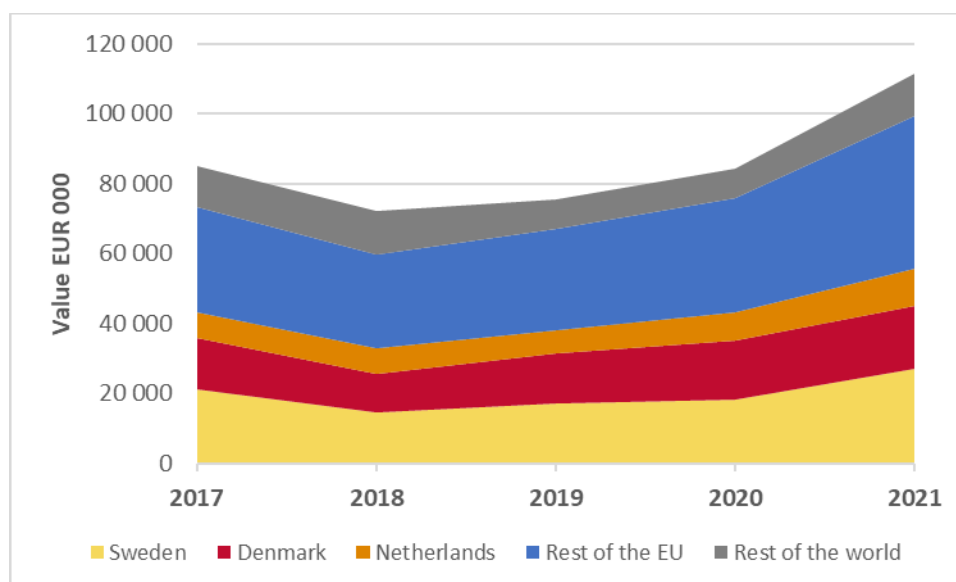
Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 1704.

In 2021 the three main exporters of sugar confectionery to Norway were Sweden, Denmark and the Netherlands. Sweden was the main exporter of sugar confectionery to Norway, with exports worth just over EUR 27 million as shown in Figure 5-41. Thus, Sweden alone accounted for over 24% of Norway's imports by value. Denmark exported about EUR 18 million, followed by the Netherlands with EUR 10 million. Nine out of the top ten sugar confectionery exporters are from the EU. The EU in total accounted for close to 88% of imports by value. The main non-EU exporters are the UK, China, and Turkey.

The world's average unit value of sugar confectionery imports into Norway was about 4 000 per tonne in 2021 as depicted in Figure 5-42. The world's unit value decreased in 2019 and increased again in 2020 and 2021. Sugar confectionery imported from the EU in 2021 had a unit price above as well as below the world's average. Sweden for example had a unit value of about EUR 3 700 per tonne. The unit value of sugar confectionery imported from the Netherlands was slightly higher at about EUR 4 100 and from Denmark at around EUR 4 200.

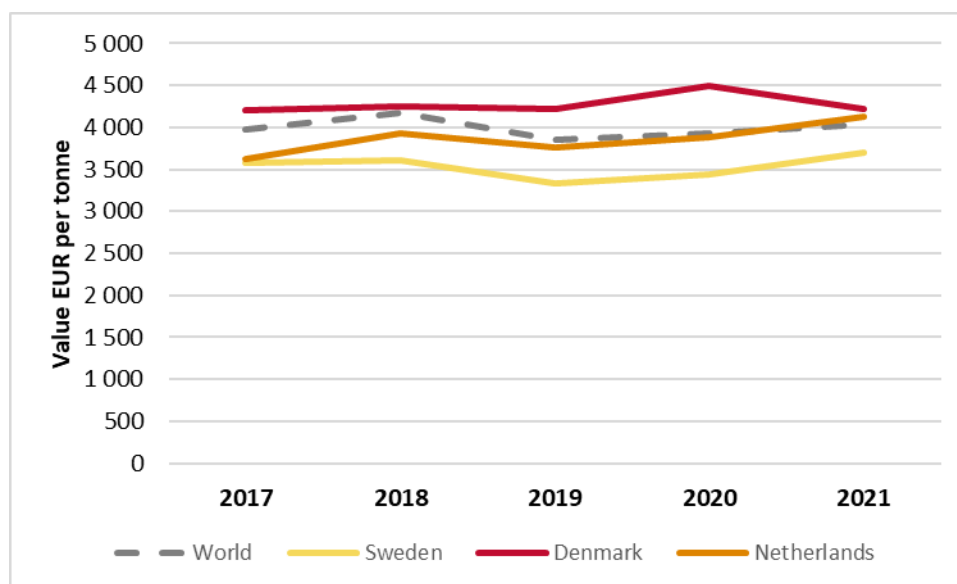
Figure 5-41: Norwegian imports of sugar confectionery by country, 2017-21; EUR 000



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 1704.

Figure 5-42: Per unit value of Norwegian imports of sugar confectionery for selected countries, 2017-21 (EUR per tonne)



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 1704.

EU GI products

As noted in section 4.2.4, Norway does not participate in the EU GI registration system for agricultural products and foodstuffs, as agriculture is not included in the EEA Agreement. As a result, registration is required in the national GI system of Norway, which is called Beskyttede

betegnelser. Currently, no sugar confectionary from the EU is registered under the Norwegian GI system.

Main competitors

The market is dominated by the Swedish company Cloetta Norge AS. Domestic players including Orkla Confectionery & Snacks Norge, and Norgesgruppen are strong as well. Conaxess Trade Norway AS, which is a trading company, is the main seller of international brands.

When it comes to imports, the EU is the most important source of sugar confectionery in Norway. However, it still has to compete with non-EU suppliers including the UK, China, and Turkey.

5.9.4 Specific market entry requirements

Market access and custom procedures

Preferential trade with the EU and Norway is ruled by article 19 of the EEA Agreement. The Norwegian food legislation is harmonised with the EU, and import requirements are generally also the same as in the EU. However, the EEA Agreement does not cover the EU common agriculture and fisheries policies or direct and indirect taxation.

In addition to the general documentation requirements that are listed in Table 4-1 certain supplementary documents are needed. These include a notification to deal in agricultural goods and a registration of importers with the Norwegian food safety authority (Mattilsynet). Most documents can be in English or Norwegian.

Pastilles and other sugar confectionery have tariffs of 0%, which is better than the MFN. However, in addition an agricultural component is applied depending on the raw materials contained in the product. The actual duty rate is calculated individually by the Directorate of Agriculture. For the remaining sugar confectionery categories, tariffs range between NOK 0.35 per kg to NOK 2.18 per kg.

Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:

Main page – select product, country of origin and destination country:

<https://trade.ec.europa.eu/access-to-markets/en/home>

Example link – sugar confectionery (1704) from Sweden to Norway

<https://trade.ec.europa.eu/access-to-markets/en/search?product=1704&origin=SE&destination=NO>

Standards

As a member of the EEA, Norway conforms with EU Regulation 178/2002 (General Food Law), which is the harmonized regulation setting out the general principles and requirements of the EU's harmonized food law. More information can be found in section 4.2.2.

Labelling

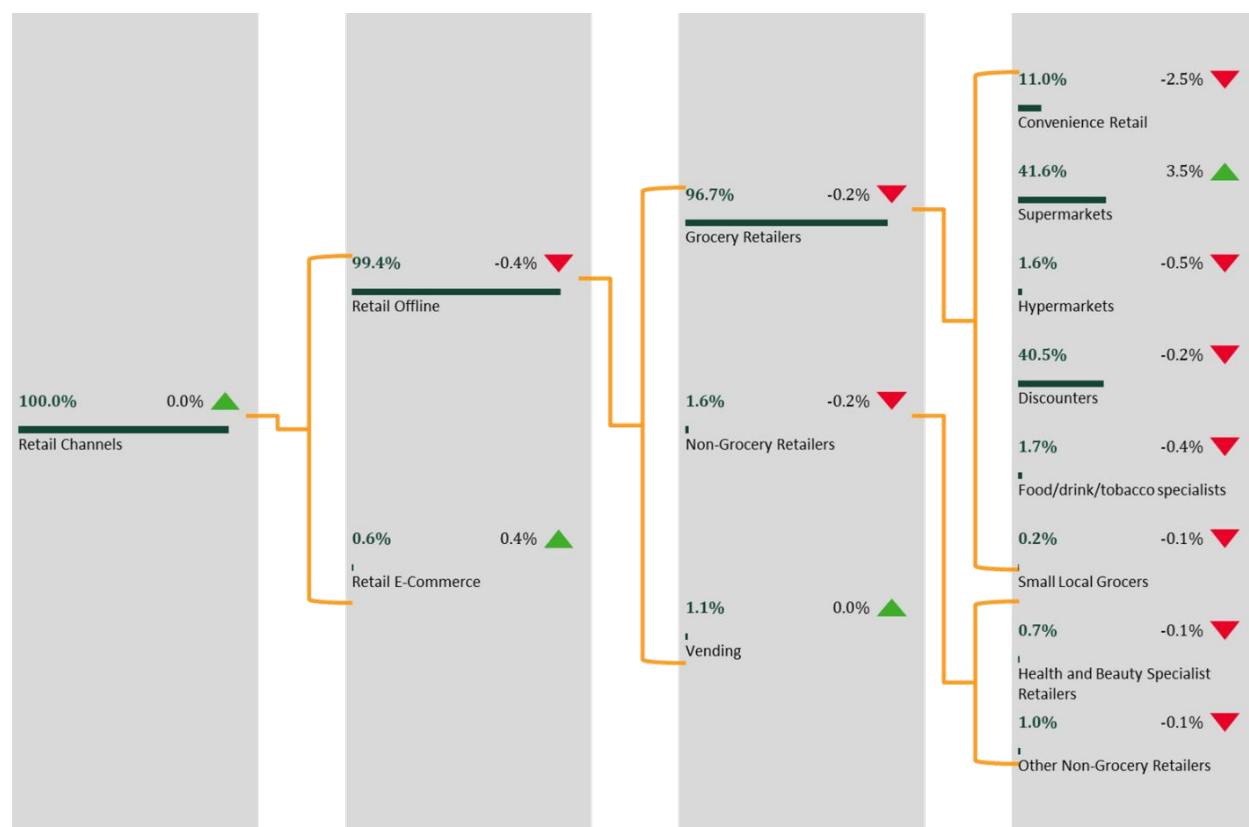
The EU's legislation on general labelling and nutritional labelling is applied in Norway. EU requirements regarding food labelling are laid out in the FIC Regulation (EC) 1169/2011. Labels must be either in Norwegian, Swedish, Danish and sometimes Finnish language. More information on labelling can be found in section 4.2.3.

5.9.5 Distribution

As shown in Figure 5-43 sugar confectionery is nearly exclusively sold through grocery retailers, with a low percentage being sold via non-grocery retailers, vending machines and e-commerce. Even though its retail value remains very low, the importance of internet retailing has increased from 0.2% to 0.6% between 2017 and 2021 and is forecast to continue to grow at a fast pace. Supermarkets (41.6%) and discounters (40.5%) are the main channels, followed by convenience retail with 11.0%. The popularity of supermarkets has been increasing during the last few years, whereas the popularity of discounters and convenience retail decreased.

Convenience retail is expected to be boosted in the next years because consumers go back to more active lifestyles after the COVID-19 pandemic. Foodservice sales are forecast to continue to increase as well because consumers regain confidence in returning to restaurants and bars.

Figure 5-43: Distribution channel overview of sugar confectionery in Norway (2021); retail value



Source: Euromonitor International: Packaged Food, 2022.

5.9.6 Challenges for EU products

Overall, the Norwegian market for sugar confectionery products offers good opportunities for the EU. The EU accounts for about 88% of sugar confectionery imports into Norway by value; and ultimately Norway has a structural deficit in this product.

That said, the dominance of large domestic Nordic manufacturers in the sugar confectionery market is one of the biggest challenges for EU producers. In addition, competition from non-EU countries such as the UK, China and Turkey is also a challenge.

The increasing health consciousness of consumers is one of the biggest challenges for sugar confectionery. However, there are opportunities for smaller pack sizes, less sugar dense and healthier products.

Many consumers tend to also purchase sugar confectionery when they go cross-border grocery shopping in e.g. Sweden. This decreases the demand in the Norwegian market.

Market Takeaway: Sugar confectionery

Consumption: *The sugar confectionery market was worth about EUR 511 million in 2022. The market is forecast to decline in coming years, whereas it increased during the previous last years.*

Competition: *The market is dominated by Nordic and domestic companies such as Cloetta Norge AS, Orkla Confectionery & Snacks Norge, Norgesgruppen and Conaxess Trade. The main non-EU competition comes from the UK, China and Turkey.*

Distribution: *Nearly exclusively through grocery retailers such as supermarkets and discounters. Convenience retail and e-commerce are forecast to grow in popularity.*

Challenges: *To compete with domestic and Nordic companies. To deal with the rising health consciousness of consumers. Cross-border shopping in Sweden.*

Opportunities: *Medicated confectionery, mints, and gums grow in popularity. Healthier and functional sugar confectionery is in demand. E-commerce as a distribution channel is growing rapidly.*

5.10 Pasta

5.10.1 SWOT analysis

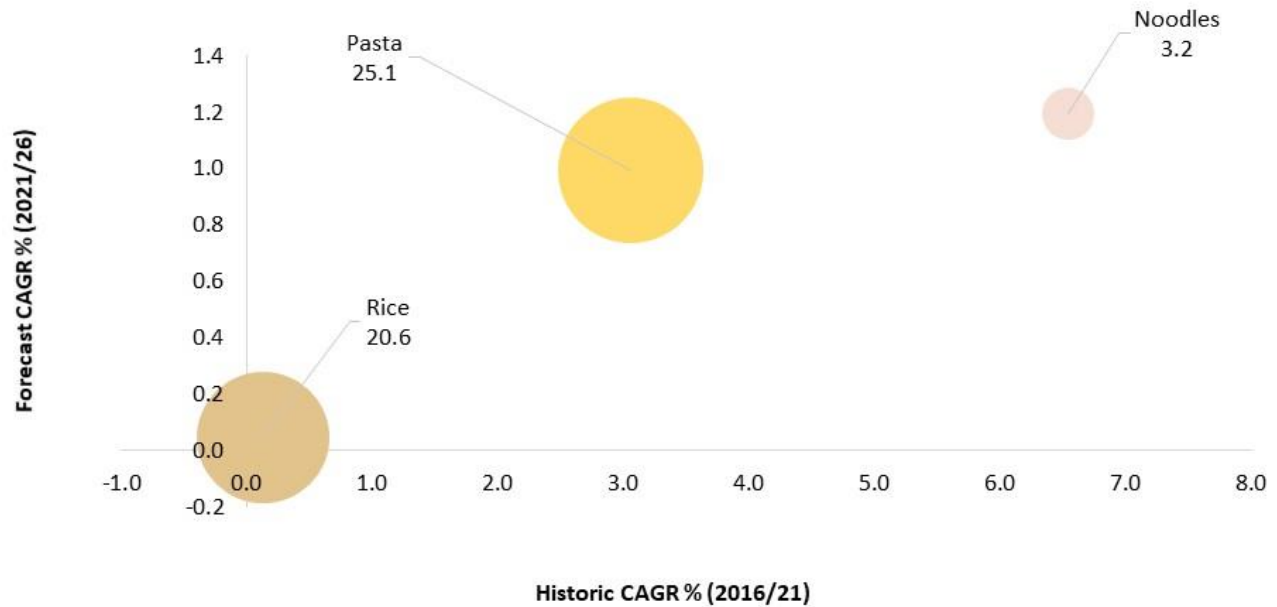
STRENGTHS (+)	WEAKNESSES (-)
- Italy is the largest exporter of pasta to Norway, and the EU as a whole accounts for around 80% of pasta/noodles exports to the country. - Younger and middle-aged consumers increasingly consume pasta over traditional staple foods such as potatoes.	- Lack of a well-established culture of pasta consumption. - Targeting older consumers, and consumers beyond urban centres which tend to have more traditional consumption habits.
OPPORTUNITIES (+)	THREATS (-)
- Demand for healthier varieties of pasta is increasing rapidly. - Advertising pasta products as a compliment to traditional Norwegian foods such as a spaghetti dish with salmon helps to resonate with consumers.	- The small amount of imports (mainly of noodles) from Thailand and China. - The positive properties of pasta such as storage and versatility are also appreciated by consumers of rice which is also a growing staple food in Norway.

5.10.2 Consumption

Evolution of consumption

Figure 5-44 below shows that pasta is the most consumed staple with a volume of 25 000 tonnes in 2021, and this category is forecasted to grow by a CAGR of 1% between 2022 and 2026. Rice is the second-largest category with a total volume of 20 600 tonnes in 2021, followed at a distance by noodles with 3 200 tonnes in 2021. Despite being the smallest category, noodles will be the fastest-growing staple with a predicted CAGR of 1.2% between 2022 and 2026.

Figure 5-44: Evolution and forecast of the pasta, noodle and rice market in Norway, 2016-2026 (000 tonnes)



Source: Euromonitor International: Packaged Food, 2022.

Consumers

Pasta consumption in Norway is driven by consumers seeking a quick, nutritious and versatile product to complement their ever-busier working lives. Traditional staple foods such as potatoes have been increasingly substituted by pasta in recent years, particularly by consumers living in urban areas of Norway. Pasta is largely consumed by middle-aged and younger consumers living in urban areas with more exposure to globalised products as pasta has not been traditionally consumed in Norway. Older consumers are more likely to opt for potatoes or other vegetables over pasta products due to this age group having more traditional food consumption habits.

Drivers and method of consumption

Key drivers of pasta consumption in Norway follow drivers found in many other European countries such as the desire for a quick and nutritious meal, the appreciation that pasta can be stocked for a prolonged period and the versatility of pasta as a product which can be incorporated into many dishes. As pasta has grown in popularity in Norway in recent years so too has its usage within traditional Norwegian dishes such as *Gryterett* which is a stew that increasingly incorporates pasta as a substitute for meat products. Norwegians commonly incorporate seafood into their pasta dishes with salmon being a favourite in the country. Methods of consumption mirror other countries such as having pasta as a quick snack or incorporating pasta into larger meals for dinner.

Purchase criteria

Pasta in Norway while expensive by most European standards is relatively cheap in the market when comparing pasta to other food products. As a result, many consumers expect pasta products such as spaghetti, ravioli and macaroni to be priced at around 20 Kr (EUR 2) for a standard pack of 500g. The majority of pasta consumed in Norway is exported from Italy, indeed Italian pasta is viewed as a high-quality product and most Italian producers will ensure to include an Italian flag or iconography on their packaging to emphasise that the pasta product is of Italian origin. Norwegians often seek out these symbols as a sign of Italian origin which equates to quality.

Recent market trends

Pasta consumption in Norway traditionally has not been high; however, today consumers are commonly exposed to and appreciate the properties that pasta products have to offer. During the COVID-19 pandemic in Norway, there was an increase in demand for foods which can be stored for a prolonged period, and pasta products were one of the main beneficiaries of this trend. As Norwegians return to work many have retained a preference for pasta products which signals that the pasta market is growing in the country although at a slower rate than during the pandemic. Demand has shifted towards what are perceived as healthier variants of pasta products, such as gluten-free or organic pasta, which will likely continue as Norwegians grow ever more health conscious.

5.10.3 Offer

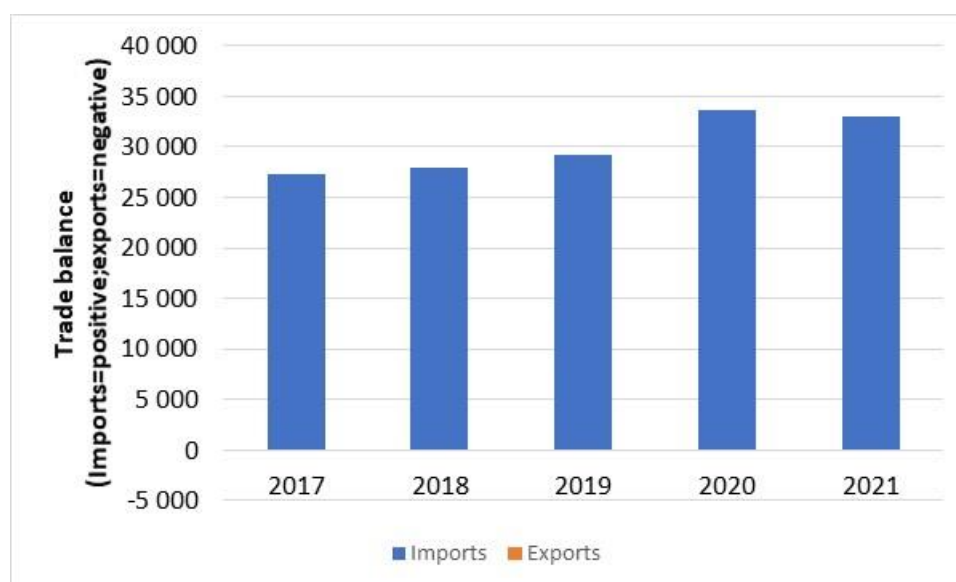
Domestic production

Production of pasta in Norway is quite small, as the country does not mass produce most of the ingredients needed for pasta and wheat production tends to fluctuate widely depending on the climate and other externalities, which makes the long-term planning of a pasta producer in Norway more difficult. This is also coupled with the fact that pasta consumption in Norway has traditionally been small and the product has been almost exclusively associated with being imported from abroad (largely from Italy). The difficulty in attracting consumers to pasta of non-Italian origin coupled with the need to import the ingredients required to make pasta and the lack of a traditional pasta production culture results in pasta production in the country being minimal.

Imports and exports

Figure 5-45 below shows the trade balance of Norwegian pasta, noodles and couscous. Norway is a net importer, importing 32 000 tonnes of these products in 2021. Norwegian exports are minimal.

Figure 5-45: Trade balance (imports and exports) of pasta, noodles, and couscous in Norway, 2017-21 (tonnes)

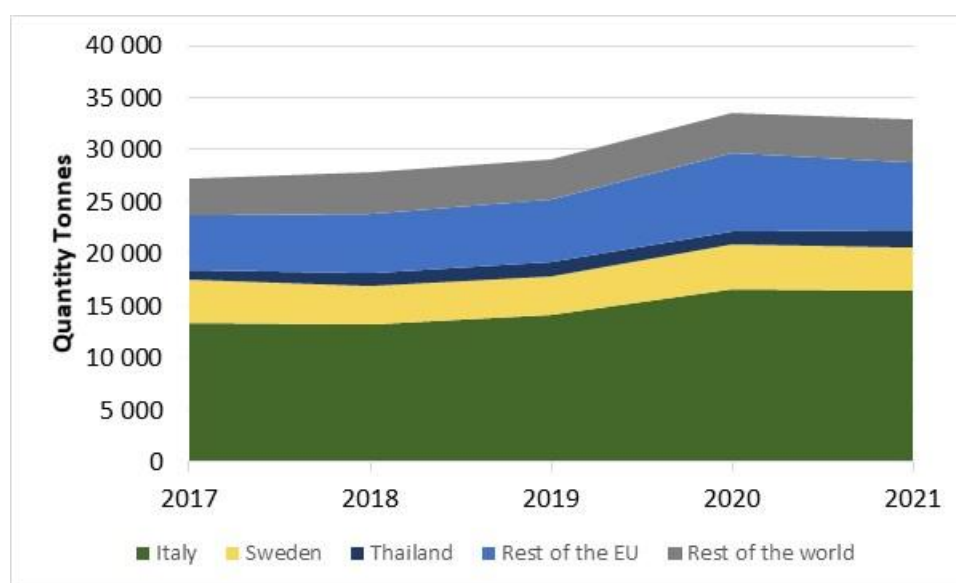


Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN codes 1902

Figure 5-46 shows that Italy is the largest exporter of pasta, noodles and couscous to Norway, exporting around 16 400 tonnes in 2021. Sweden is the second-largest exporter, followed by Thailand. Overall, the EU accounts for roughly 80% of imports by Norway.

Figure 5-46: Norwegian imports of pasta, noodles and couscous by country, 2017-21 (tonnes)



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 1902

EU GI products

As noted in section 4.2.4, Norway does not participate in the EU GI registration system for agricultural products and foodstuffs, as agriculture is not included in the EEA Agreement. As a result, registration is required in the national GI system of Norway, which is called Beskyttede betegnelser. Currently, no pasta product from the EU is registered under the Norwegian GI system.

Main competitors

The Norwegian market is favourable for EU exporters as many consumers associate pasta as an imported and largely Italian product; this coupled with the lack of a major production base domestically in Norway for pasta results in minimal competition for EU pasta in the country. China and Thailand are smaller exporters of staple foods to the country although products from these countries are likely to involve noodles (as trade data for pasta also covers noodles) and to be consumed in different dishes and are therefore unlikely to directly threaten EU pasta products.

5.10.4 Specific market entry requirements

Market Access and Entry

The customs procedures for importing foodstuffs are set out in section 4.2.1. A full list of the general documentary requirements for export set out in Table 4-1, along with requirements by product category in Table 4-2. The key requirement for pasta is a declaration of conformity.

In terms of tariffs, pasta faces ad valorem tariffs of NOK 2.33 per KG (EUR 0.22)

Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:

Main page – select product, country of origin and destination country:

<https://trade.ec.europa.eu/access-to-markets/en/home>

Example link – pasta, noodles, couscous (1902) from Italy to Norway

<https://trade.ec.europa.eu/access-to-markets/en/results?product=190211&origin=IT&destination=NO>

Standards, SPS measures, labelling

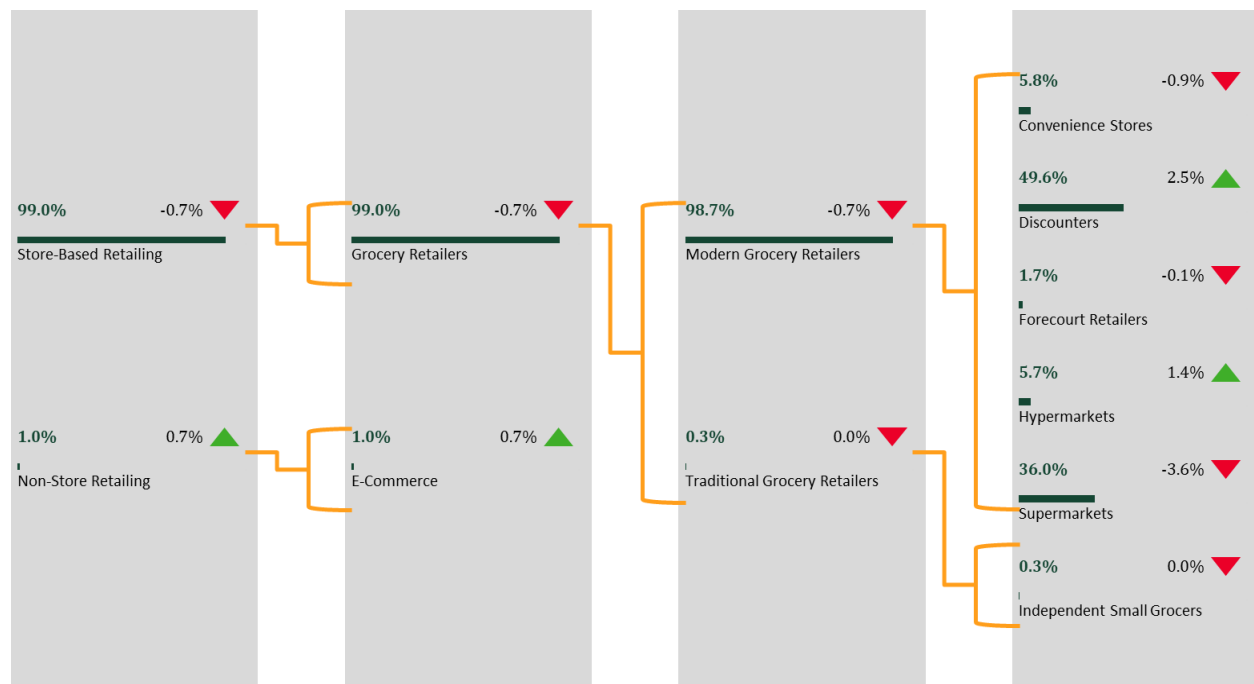
Regulations about requirements, prohibited substances not allowed for use in these products, quality requirements etc. are mostly the same as in the EU due to effort to harmonise Norwegian food safety requirements with EU legislation. It is the responsibility of the importer that the imported foodstuff is safe for human consumption and that the labelling and the content comply with Norwegian food regulations. The products must be labelled in Norwegian or in a language that resembles Norwegian (Swedish or Danish are the only generally accepted alternatives). The Keyhole label (Nøkkelhullet) is a voluntary Nordic label for food which is been used in all Nordic countries. In Norway, the Directorate of Health and the Norwegian Food Safety Authority are

responsible for this labelling scheme, this label is commonly found on fruit and vegetable products in the country.

5.10.5 Distribution

Figure 5-47 outlines the main distribution channel for pasta in the Norwegian market. Modern grocery retailers are the largest distribution channel accounting for 98.7% of all sales with discounters being the largest sub-channel with a share of 49.6%. Supermarkets account for 36% of sales while convenience stores account for 5.8% of sales.

Figure 5-47: Distribution channel overview of pasta in Norway (2021); retail value



Source: Euromonitor International: Packaged foods, 2022.

5.10.6 Challenges for EU products

A notable challenge in the Norwegian market has been targeting consumers who prefer more traditional food consumption patterns; this can be addressed by producers promoting their pasta products as a complement to popular Norwegian foods such as advertising a spaghetti and salmon dish for example. Norwegians largely associate pasta of high quality as being of Italian origin, which makes it difficult for other EU Member States with a pasta production base to compete in Norway. Going forward, pasta growth rates are forecasted to slow down as people spend more time outside of the home and therefore the need to have foods which can be stored for a prolonged period is reduced; at the same time, pasta will benefit from the increasing demand for convenience foods as consumers commute and work away from the home.

Market Takeaway: Pasta

Consumption: Pasta consumption in Norway is growing amongst middle-aged and younger consumers who often use pasta as a substitute product for more traditional staple foods such as potatoes.

Competition: Competition from non-EU exporters is minimal, with China and Thailand exporting a small amount of noodles to Norway which is unlikely to directly threaten EU pasta products in the short term.

Distribution: Modern grocery retailers such as supermarkets and discounters are the main channels of distribution for pasta with 98.7% of sales coming from this channel.

Challenges: Targeting older more traditional consumers coupled with the reduced need to store food for a prolonged period post-COVID-19 are the two bigger challenges in the market.

Opportunities: The export of pasta which incorporates health properties and the advertising of pasta with traditional Norwegian foods such as salmon are the larger opportunities in this market.

5.11 Processed fruit and vegetables

5.11.1 SWOT analysis

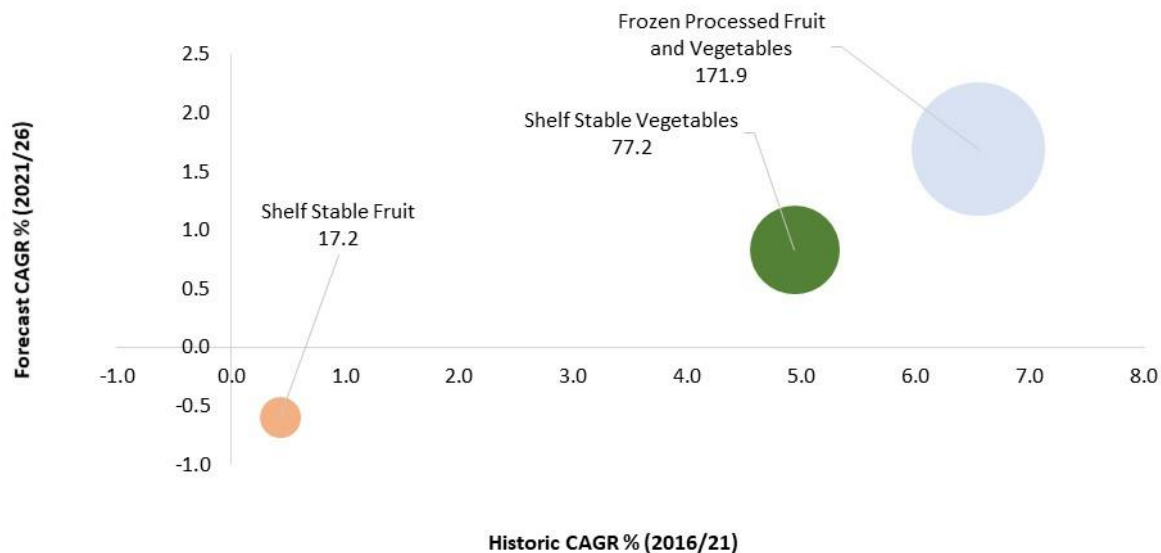
STRENGTHS (+)	WEAKNESSES (-)
- Consumption of processed fruit and vegetables grew between 2020-2021, aided by the rise in home cooking as a consequence of the outbreak of COVID-19. - Younger and middle-aged urban consumers appreciate the convenience of processed fruit and vegetable products.	- Shelf-stable fruits which are mass-produced in the EU are a small category in Norway and are expected to see a decline in growth. - Older consumers continue to hold concerns about processed fruit and vegetable consumption and tend to prefer fresh alternatives.
OPPORTUNITIES (+)	THREATS (-)
- Demand for alternative, healthier variants of processed fruit and vegetable products is growing and is the main opportunity area in the country. - Fruit smoothies are increasingly consumed in the country and are a new key growth area for producers.	- Norway is a (small) producer of certain processed fruit and vegetable products such as frozen fries, carrots and certain pickled fruit and vegetables. - Government initiatives aiming to increase fresh fruit and vegetable consumption.

5.11.2 Consumption

Evolution of consumption

Frozen processed fruit and vegetables have the highest retail value in Norway at EUR 171 million, but are expected to decline by a CAGR of -1.7% between 2022 and 2026. This is followed by shelf-stable vegetables which have a retail value of EUR 77.2 million and are expected to grow by a CAGR of 0.8% between 2022 and 2026. Shelf-stable fruit is the smallest overall category with a retail value of EUR 17.2 million and are forecast to decline at a CAGR of -0.6% between 2022 and 2026. All three categories grew over the period from 2016 to 2021, as shown below in Figure 5-48.

Figure 5-48: Evolution and forecast of the processed fruit and vegetable market in Norway, 2016-2026; retail value (EUR million)



Source: Euromonitor International: Packaged Food, 2022.

Consumers

Consumers of processed fruit and vegetables in Norway are most likely to be urban, middle age or younger. Older consumers in the country typically are more attached to fresh fruit and vegetable products and less likely to consume processed fruit and vegetables which are often perceived to be less healthy by older consumers. Middle-aged to younger consumers have less time in the evening to prepare fresh fruit and vegetable dishes which consequently results in this consumer base being more likely to seek out processed fruit and vegetable products. The high price of fruit and vegetables in Norway also makes a mixed package of multiple frozen or shelf staple fruit and vegetables appealing for lower income earners who may not be able to purchase multiple fresh variants of fruit and vegetables in one sitting.

Drivers and method of consumption

Processed fruit and vegetables benefit from having a prolonged shelf life which allows consumers to stockpile the product. Consumers particularly appreciated this trait during the COVID-19 pandemic which saw a notable rise in sales of processed fruit and vegetables. Consumers of processed fruit and vegetables will typically consume these products for a lunch or dinner meal with fresh fruit and vegetable being overwhelmingly preferred for a breakfast or dessert meal. Some popular processed fruit and vegetable products in Norway include frozen fries, frozen peas and multiple varieties of pickled vegetables.

Purchase criteria

Consumers in Norway overwhelmingly prefer to have frozen processed fruit and vegetable products over shelf-stable variants, which is due in part to most Norwegians having the appliances needed to stock frozen processed fruit and vegetables at home for a prolonged period and also

because most popular processed fruit and vegetables are frozen. Consumers increasingly are concerned about the impact of processed fruit and vegetables on their health prompting producers to increasingly focus on the premiumisation of their products, with there being a notable rise in organic processed fruit and vegetables in the Norwegian market in recent years.

Recent market trends

There are several key recent market trends producers should take note of in the Norwegian processed fruit and vegetable market which include:

Increase in vegetarianism

Despite strong competition from fresh fruit and vegetables coupled with government initiatives aimed at promoting the consumption of fresh products, processed fruit and vegetables are set to benefit from the increase in vegetarianism in Norway. Norwegians are increasingly concerned about how their consumption patterns impact the environment and the welfare of animals. Processed fruit and vegetables benefit as a product which can be consumed by vegetarians and the convenience that they can be stored for a prolonged period.

Innovations set to focus on premiumisation and health benefits, led by private label

Producers are increasingly focusing on premiumisation and health benefits in new product development as these are key consumer trends. Processed fruit and vegetable products tend to struggle to compete with their fresh variants, thus communicating the quality of ingredients is expected to be a prominent promotional strategy for manufacturers. The introduction of more healthy options, to compete with fresh foods, as well as increasingly premium private-label offerings are expected.

The large increase in demand for frozen fruit smoothies.

Frozen smoothie mixes are expected to further grow in importance in frozen fruit, as more consumers increasingly appreciate the convenience of these products. As fruits and berries are often combined with a packaged beverage, such as juice, fresh options are not considered to be notably better for smoothies in terms of flavour. Smoothies are also perceived as a relatively healthy snack option to consume during the day, whether at home or on the go.

5.11.3 Offer

Domestic production

The domestic production of processed fruit and vegetables in Norway is small as the country itself is a small producer of fruit and vegetables. The more commonly produced processed fruit and vegetables in the country include frozen fries, frozen carrots and several pickled fruit and vegetables. Eldorado is the brand with the largest market share in the country with a share of 23.6% of the processed fruit and vegetable market, while the rest of the market is largely made up of private labels from the larger retailers present in the market such as COOP and Rema.

Imports and exports

Identifying data on trade in processed fruit and vegetable product is extremely complicated due to the number of different lines under which such products can be imported. Data on trade in processed fruit and vegetables is ultimately captured under the trade data for fruit and vegetables in section 5.2.3.

EU GI products

As noted in section 4.2.54, Norway does not participate in the EU GI registration system for agricultural products and foodstuffs, as agriculture is not included in the EEA Agreement. As a result, registration is required in the national GI system of Norway, which is called Beskyttede betegnelser. Currently, no processed fruit and vegetable product from the EU is registered under the Norwegian GI system.

Main competitors

The main competitors in this market come from domestic production of certain processed fruit and vegetable products such as frozen fries, frozen carrots and certain pickled fruit and vegetable products, although overall the EU is in a relatively strong position in the market as it largely dominates the trade of fruit and vegetables imported into Norway.

5.11.4 Specific market entry requirements

Market Access and Entry; Standards, SPS measures; labelling

In terms of notable documents required to export, standard procedures such as registering with the European Trade Control and Experts System (TRACES) and informing the Norwegian food authority are required. Tariffs are variable depending on a combination of pre-determined quotas, the time of the year (seasonal production in Norway) and local production.

Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:

Main page – select product, country of origin and destination country:

<https://trade.ec.europa.eu/access-to-markets/en/home>

Example link – frozen fruit category (0811) from Denmark to Norway

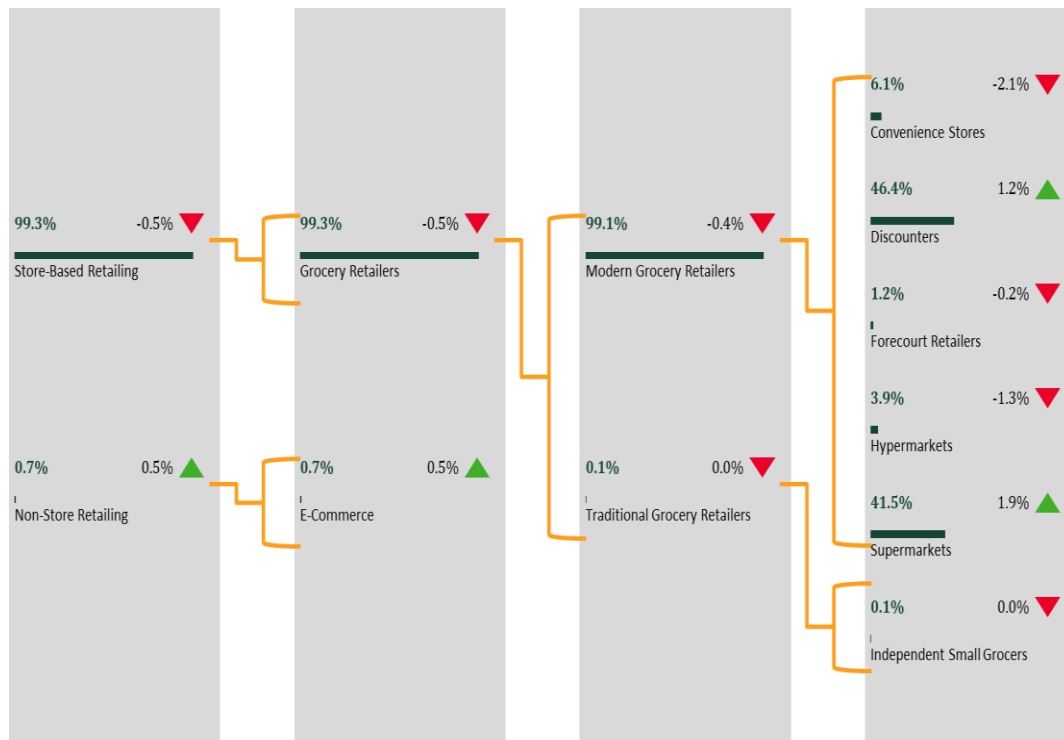
<https://trade.ec.europa.eu/access-to-markets/en/results?product=20060010&origin=DK&destination=NO>

Packaged processed fruit and vegetable products must conform to the labelling requirements for packaged foods set out in section 4.2.3.

5.11.5 Distribution

As can be seen in Figure 5-49, modern grocery retailers account for the majority of sales of processed fruit and vegetable products in Norway with a share of 99.1%. Within modern grocery retail outlets, discounters have the largest share at 46.4% of sales. Supermarket stores have a share of 41.5%, followed by convenience stores with a share of 6.1%. E-commerce sales continue to grow from a low base, aided by the need to stay at home during the COVID-19 pandemic, and currently account for 0.7% of sales.

Figure 5-49: Distribution channel overview of processed fruit and vegetables in Norway (2020); retail value



Source: Euromonitor International: Packaged Food, 2022.

5.11.6 Challenges for EU products

The main challenge for EU products comes from competition from fresh fruit and vegetable products which remain preferred by many consumers, particularly older consumers. This coupled with government efforts to increase fresh fruit and vegetable consumption places further pressure on processed fruit and vegetable products. Nonetheless, most categories in this sector are expected to continue to grow between 2022 and 2026.

Market Takeaway: Processed fruit and vegetables

Consumption: Consumers are mainly middle-aged to younger urban consumers which appreciate the convenience of processed fruit and vegetable storage and consumption. Frozen fruit and vegetables are by a considerable distance the most preferred processed fruit and vegetable category in the Norwegian market.

Competition: Largely comes from the domestic market which itself is limited in production due to Norway being a very small producer of fruit and vegetables. The EU accounts for the majority of fruit and vegetable exports to the country placing it in a strong position in the market.

Distribution: Virtually only sold through modern retail channels such as discounters, supermarkets and convenience stores. E-commerce has emerged as a new channel of distribution in recent years, albeit from a currently low share of 0.7%.

Challenges: Initiatives from the government to encourage fresh fruit and vegetable consumption coupled with the need to pivot production to cater to an ever more health-conscious market are the two bigger challenges in this sector in Norway.

Opportunities: Demand for alternative processed fruit and vegetables such as organic and trans-fat-free varieties (e.g. frozen fries) is growing and is the key opportunity area in this category.

5.12 Processed meat

5.12.1 SWOT analysis

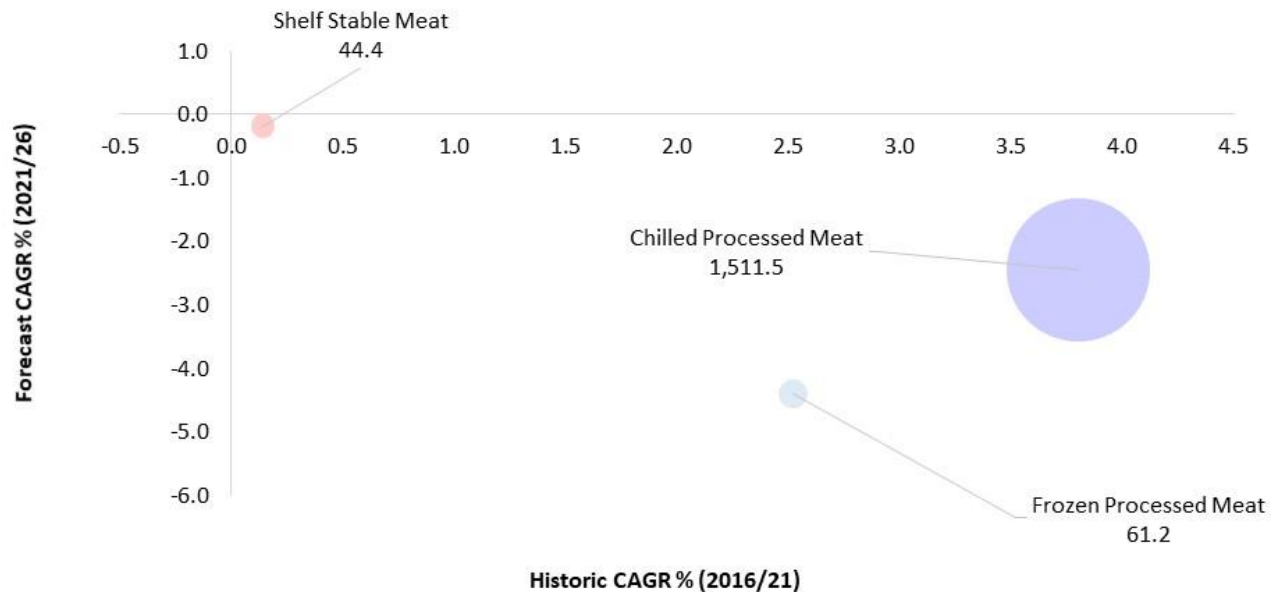
STRENGTHS (+)	WEAKNESSES (-)
▪ EU accounts for the vast majority of exports of processed meat to Norway, at around 95% of total import value. ▪ Norwegians hold EU speciality processed meats from origins such as Spain, Germany and France in high regard. ▪ Domestic processed meat often is viewed as a more basic food item (e.g. hot dogs) compared to imported processed meat.	▪ Total consumption is forecasted to decline across multiple processed meat categories. ▪ The largest processed meat product consumed in Norway, the <i>pølse</i> (hot dog) is also largely only produced in Norway. ▪ The food service sector is still recovering and has yet to fully reach pre-COVID-19 levels of traffic and distribution.
OPPORTUNITIES (+)	THREATS (-)
▪ Meat substitute products are growing rapidly in popularity. ▪ Return to cross-border trade encourages consumers to seek out EU-processed meats in neighbouring markets, which ultimately may result in consumers seeking these products within Norway itself. ▪ Labour day sees a spike in demand for processed meats as many consumers have a BBQ to celebrate.	▪ Rise in vegetarianism in Norway. ▪ Domestic producers are well in tune with the rising demand for meat substitute products. ▪ The government of Norway has enacted several initiatives surrounding healthy living and often highlights that regular consumption of processed meat is bad for consumers' health. The health authorities in the country are held in high regard by most consumers.

5.12.2 Consumption

Evolution of consumption

Figure 5-50 illustrates the evolution of the retail value of various processed types of meat in Norway. Chilled processed meat is the largest market by a considerable distance with a retail value of EUR 1.5 billion in 2021. However, the market is predicted to decline by a CAGR of -2.5% between 2022 and 2026. Frozen processed meat is the second largest segment with a market value of EUR 62 million. It grew marginally over the period 2016 to 2021 but is forecast to decline going forwards at a CAGR of -4.4% between 2022 and 2026. Shelf-stable meat is the smallest segment with a retail value of EUR 44 million.

Figure 5-50: Evolution and forecast of the market for processed meat in Norway, 2016-2026 (EUR million)



Source: Euromonitor International: Pet Care, 2022.

Consumers

Consumers of processed meat in Norway largely live in urban areas having more access to retail and food service outlets that sell processed meat products. It is important to note that roughly 80% of the population lives in urban areas. Middle-aged and older consumers are key consumers of processed meat in the country, as younger consumers are more likely to adopt a vegetarian-based diet or reduce their total meat consumption, opting for fresh meat when they do decide to consume meat. Consumers who have to extensively travel across Norway are another group more likely to regularly consume processed meat products via convenience stores which typically offer products such as Norwegian hot dogs (*pølse*).

Drivers and method of consumption

Norwegians enjoy being outdoors and BBQs are common social activity in the country, particularly in the summer months, and this typically complements the consumption of processed meat products. As mentioned previously, hot dogs are very popular in Norway and are a common street food available in the larger cities. It is estimated that as much as 450 million hot dogs are consumed every year in Norway, which equates to around 100 per person.⁴⁰ The *pølse* (Norwegian hot dog) indeed is a key driver of overall processed meat consumption in the country. Norwegians typically consume processed meat as a snack (in the case of a hot dog) or as a part of a lunch or dinner meal with processed meats such as sausages, burgers and bacon being commonly consumed in the country.

⁴⁰ Why Norway loves its own take of the Hot Dog, The BBC, Available at <https://www.bbc.com/news/av/world-europe-48054846>

Purchase criteria

As is often the case, one of the main purchase criteria is the price. The appeal of certain processed meat products such as hot dogs is that they are cheap, which helped to expand the popularity of the product throughout Norway. Norwegians are increasingly seeking out red meat substitute products such as plant-based hot dogs, and chicken products which are favoured due to their relatively lower price. Norwegians further appreciate products indicating care for the welfare of the animal on their packaging. Most Norwegians plan to store processed meat products for a prolonged period before consumption, with many consumers associating processed meat products with consumption at a later date unlike the ever-popular processed seafood products which should be consumed quickly. Most of the processed beef and pork meat products consumed in Norway today are in the form of mincemeat and sausages which will be typically preferred by consumers.⁴¹ Ultra-processed meat products are increasingly viewed as unhealthy by consumers which may dissuade them from purchasing.

Recent market trends

In the last years the following trends have been in particular shaping the processed meat market in Norway:

Return to cross-border trade

Processed meat has seen a slowdown in retail current value and volume growth in 2022, due to the resumption of cross-border trade in the previous year (post-COVID-19). All categories within processed meat and seafood are popular items for Norwegians to purchase on day trips to Sweden. Chilled processed meat and chilled meat sold in Norway benefitted from closed borders during the COVID-19 pandemic, however less so than frozen processed meat. They also benefitted from people spending more time preparing meals at home. The reopening of borders as well as the resumption of food service in 2021 had a negative effect on processed meat sales.

The rise in health and sustainability

Health and sustainability remain key drivers of growth in processed meat. This is particularly evident in red meat substitutes, which grow substantially more than red meat, and poultry, although from a smaller base. The number of vegetarians or vegans doubled in 2021, mostly in urban areas. This is often due to concerns surrounding health, the environment and animal welfare. Many Norwegian consumers, especially younger ones, wish to decrease their meat consumption, with 20% of consumers identifying as flexitarians (person who has a primarily vegetarian diet but occasionally eats meat or fish.)

Reopening of the food service sector

The food service channel saw a notable recovery in 2021 and 2022, with consumers resuming a similar frequency of eating out to that seen pre-COVID-19. From 2023, the rate of recovery is set to stabilise. Food service is catching up with the latest trends by increasingly providing more dishes containing meat substitutes. This is likely to attract health and sustainability-focused consumers and bring greater awareness to meat substitutes in general.

⁴¹ Meat consumption and consumer attitudes a Norwegian perspective, Oydis Udland, Rune Rodbotten, Paula Verela, available at <https://www.sciencedirect.com/science/article/pii/S0309174022001887>

5.12.3 Offer

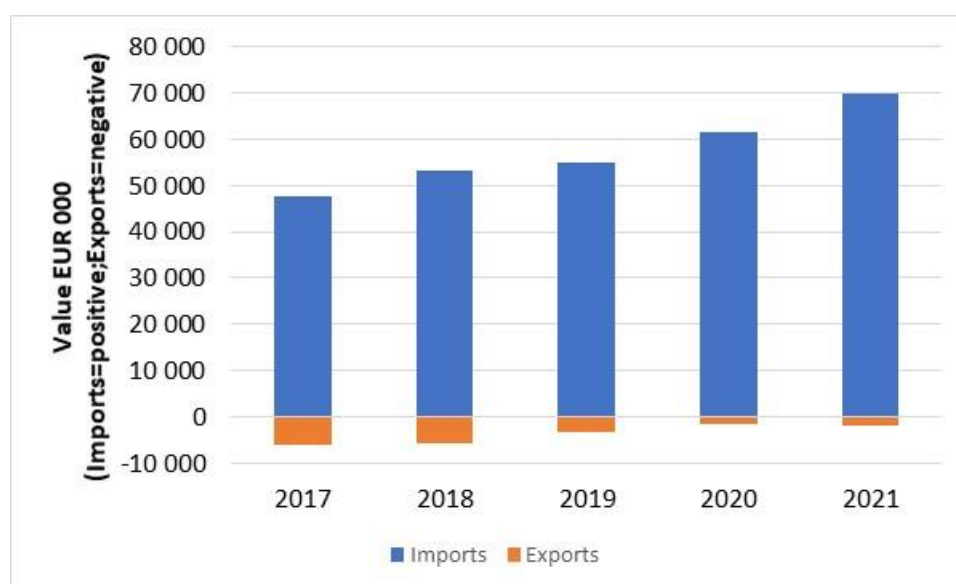
Domestic production

Norway is home to several large, processed meat companies such as Gilde, Lofoten and Grilstad. Typical products produced within Norway include processed hot dogs (produced in a particular Norwegian style, known as *pølse*), salami and bacon. Large processing plants are typically located near larger urban centres in the country. Gilde is the largest producer of processed meat in the country with the brand having a 28.8% share of the processed meat market. Lofoten has an 8.1% share, while the rest of the market is made up of smaller producers. Overall, however, domestic production is lower than in other European countries, which raises the need to import processed meat products from abroad.

Imports and exports

Figure 5-51 shows that Norway is a heavy net importer of processed meats. This is reflective of the smaller size of the domestic production base in the country and the low level of exports from Norway which have been falling annually since 2017. The country has expanded its imports of processed meat products from a value of EUR 47.5 million in 2017 to EUR 69 million in 2021.

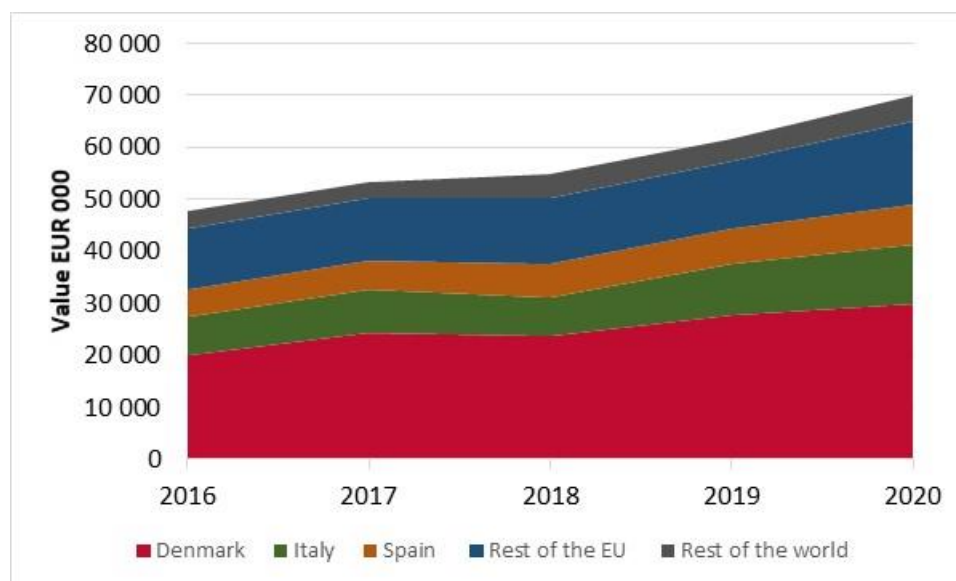
Figure 5-51: Trade balance (imports and exports) of processed meats in Norway, 2017-21 (EUR 000)



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 230910

Figure 5-52 shows that Denmark was the biggest exporter of processed meat to Norway in 2021. Denmark exported meat products with a value close to EUR 29 million. Italy ranked second with about EUR 11 million, followed by Spain with about EUR 7.5 million. These three main exporters together accounted for well over half of all Norwegian imports in 2021, with the EU as a whole accounting for around 95% of all processed meat imports into Norway. Other large processed meat exporters from the EU include Sweden, France and Germany. The larger non-EU exporters of processed meat to Norway include Thailand, Brazil and China.

Figure 5-52: Norwegian imports of processed meats by country, 2017-21 (EUR 000)

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 230910

EU GI products

As noted in section 4.2.4, Norway does not participate in the EU GI registration system for agricultural products and foodstuffs, as agriculture is not included in the EEA Agreement. As a result, registration is required in the national GI system of Norway, which is called *Beskyttede betegnelser*. Prosciutto di Parma is a protected GI in the Norwegian system.

Main competitors

The EU accounts for the vast majority of processed meat products imported by Norway and is appreciated for its high quality products. Processed meats from Denmark, Spain and Italy have a good reputation in Norway, which reflects why these are the three biggest exporters of processed meat products to the country. The bigger competition is from domestic producers, particularly for hot dogs, although EU processed meat products are often viewed as luxury, high-end/premium products while domestic processed meat is often viewed as a more basic food item.

5.12.4 Specific market entry requirements

Market Access and Entry

Processed meat products exported from the EU to Norway are subject to a general tariff of around 93 NOK (8.70) per kg although this varies by product and cut of meat. In order to export processed meat products to Norway, you require proof that your product is registered with the European Trade Control and Experts system (which is also required within the EU itself). You must also inform the Norwegian Food Safety Authority that you intend to export your product to Norway and obtain a document stating this, which is to be given to the Norwegian custom officials.

information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:

Main page – select product, country of origin and destination country:

<https://trade.ec.europa.eu/access-to-markets/en/home>

Example link – cat and dog food category (230910) from Denmark to Norway

<https://trade.ec.europa.eu/access-to-markets/en/results?product=160290&origin=DK&destination=NO>

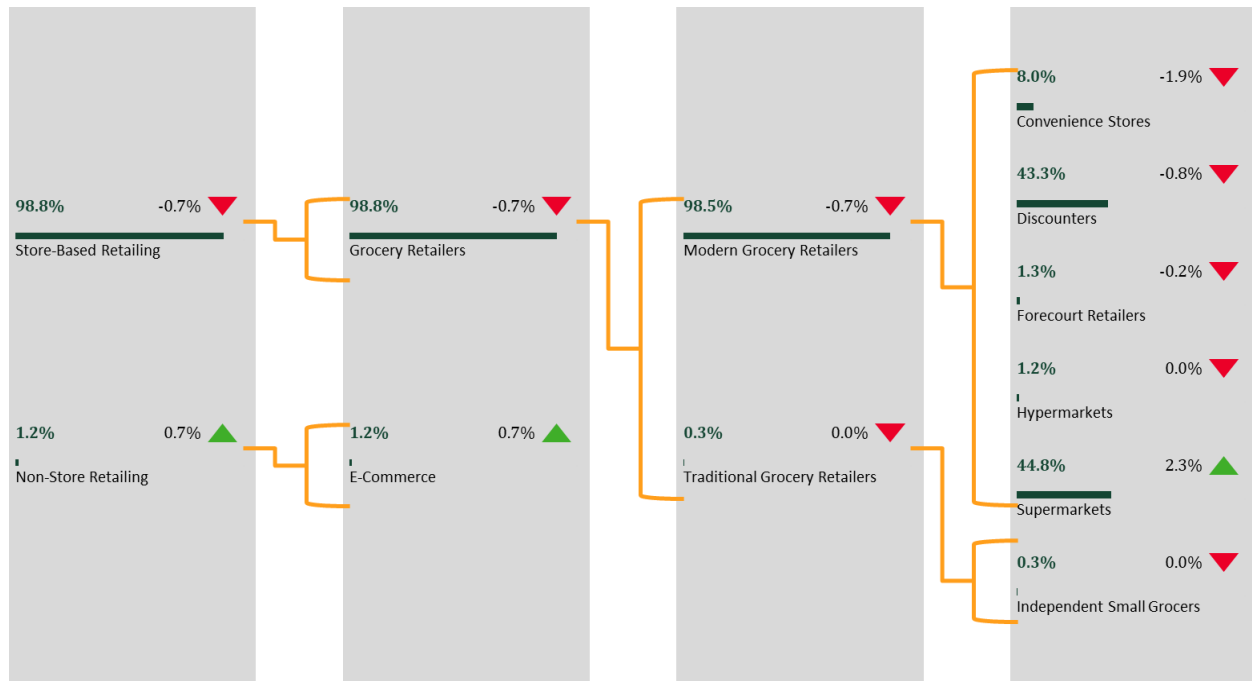
Standards, SPS measures, labelling

Regulations about requirements, prohibited substances not allowed for use in these products, quality requirements etc. are mostly the same as in the EU due to effort to harmonised Norwegian food safety requirements with EU legislation. It is the responsibility of the importer that the imported foodstuff is safe for human consumption and that the labelling and the content comply with Norwegian food regulations. The products must be labelled in Norwegian or in a language that resembles Norwegian (Swedish or Danish are the only generally accepted alternatives). Both importers and first recipients must carry out internal controls and have procedures that ensure compliance with food legislation and the Norwegian national regulation concerning internal control (<https://www.arbeidstilsynet.no/regelverk/forskrifter/internkontrollforskriften/>).

5.12.5 Distribution

Figure 5-53 below shows that modern grocery retailing is the largest distribution channel in Norway for processed meats, with 98.8% of processed meats being distributed via this channel. During the last years, e-commerce retailing has been gaining a lot of popularity and in 2021 accounted for 1.2% of sales. Modern grocery retailers in particular supermarkets remain the most important retailer outlet, with a 44.8% share of sales in 2021. This is followed closely by discounters as the second most important channel, accounting for 43.3% of the total retail value.

Figure 5-53: Distribution of processed meat in Norway (2021); retail value



Source: Euromonitor International: Processed meats, 2022.

5.12.6 Challenges for EU products

EU producers in the Norwegian market are mostly challenged by the overall predicted decline in conventional processed meat consumption in Norway. This is driven by younger consumers increasingly abstaining from processed meat consumption and the rise in health consciousness across the entire consumer base, exasperated by the outbreak of COVID-19. EU producers will increasingly have to offer plant-based variants of their products to avoid risking alienating themselves from a large section of the younger consumer base in the country.

Market Takeaway: Processed meat

Consumption: Processed meats such as hot dogs (pølse), bacon and poultry products stand as the most popular in Norway. Consumers are most likely to be middle-aged and older, living in urban centres, with younger consumers increasingly abstaining from meat consumption.

Competition: Domestic production of products such as hot dogs and certain poultry products is the bigger competition in the market but outside of Norway total competition is quite small with the EU accounting for some 95% of the value of processed meats imported by Norway.

Distribution: The main channels are modern grocery retailers such as supermarkets as well as discounters. The popularity of internet retailing has been increasing in recent years also for processed meat distribution.

Challenges: The rise of health consciousness and vegetarianism in Norway are the two bigger challenges. Consumers increasingly seek meat substitute products, which means EU processed meat producers may need to pivot production and offer a plant-based variant of their products.

Opportunities: Meat substitute products, the rise of consumption on particular dates such as labour day, and the gap created by the relatively small production base in Norway are the bigger opportunities in the market.

5.13 Biscuits / cereal bars

5.13.1 SWOT analysis

STRENGTHS (+)	WEAKNESSES (-)
▪ The market has been growing in recent years. ▪ Norway is a strong net importer of biscuits and cereal bar products. ▪ The EU in total accounted for close to 87% of the import market value in 2021.	▪ The overall market is forecast to decline in coming years. ▪ The health consciousness of consumers decreases the demand for sugar dense and high calorie biscuits and cereal bars. ▪ Some consumers are more price sensitive because of increasing food prices and the threat of increasing inflation.
OPPORTUNITIES (+)	THREATS (-)
▪ Snack bars stand out because the category has been growing at a fast pace historically and is the only one forecast to grow in the coming few years. ▪ The demand for healthier varieties of biscuits and cereal bar products is increasing. ▪ Smaller pack sizes are on demand because people go back to busier lifestyles and thus look for on-the-go items.	▪ The market is dominated by Orkla Confectionery & Snacks Norge, Mondelez Norge AS and Scandza AS. ▪ The main non-EU exporters are the UK and Turkey. ▪ Competition with domestic products that know the changing demands of consumers best.

5.13.2 Consumption

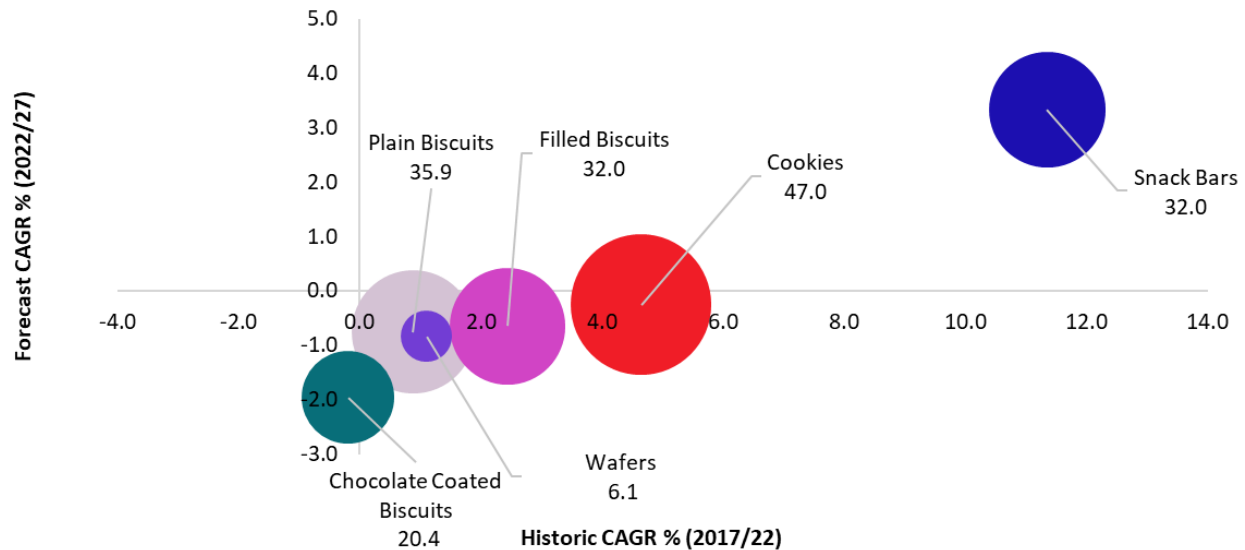
Evolution of consumption

The market size of the biscuits and cereal market in Norway was around EUR 173 million in 2022. As shown below in Figure 5-54, cookies was the largest product category, with a value of EUR 47 million. This was followed by plain biscuits with close to EUR 26 million, snack bars and filled biscuits with about EUR 32 million, and chocolate coated biscuits with more than EUR 20 million. Wafers was the smallest category at over EUR 6 million.

Historically, the market has been growing. In particular snack bars stand out as this category grew at a CAGR of over 11.3% between 2017 and 2022, by far the highest growth rate of any of the categories. The cookies market grew at the second strongest with a CAGR of about 4.6%. All other categories grew at lower rates. Only the market for chocolate coated biscuits has been declining.

Between 2022 and 2027, the market for biscuits and cereal bars is forecast to decline overall. Only snack bars is forecast to have a positive growth rate of 3.3%. Chocolate coated biscuits, on the other hand, is forecast to decline the most with a CAGR of approximately -2.0%.

Figure 5-54: Evolution and forecast of the market for biscuits and cereal bars in Norway, 2017-2027; retail value (EUR million)



Source: Euromonitor International: Packaged Food, 2022.

Consumers

Biscuits are fairly universally consumed in Norway. Consumption of snack bars is a newer common habit and is growing fast. Busy consumers will be incentivised to purchase cereal bar products as they offer a quick on-the-go snack or are an easy little ‘pick me up’ during a day of working. Biscuits and cookies are enjoyed by consumers who want to treat themselves and particularly children. Health-conscious consumers enjoy cereal bars and other snack bars with healthy ingredients to get an energy boost in the gym or in general to have a quick – but healthy – treat during the day. Consumers who aim to include more plant-based items into their diet will opt for plant-based biscuits and cereal bars.

Drivers and method of consumption

Many consumers started to go back to cross-border shopping after restrictions related to the COVID-19 pandemic were lifted. This change negatively affects the sales of biscuits and cereal bars in Norway as many people now purchase these products e.g. in Sweden again. Sweet biscuits of all types in particular are a popular item which is brought back frequently from Sweden. This means the domestic demand is likely to decline. Cross-border shopping is forecast to continue to grow, until it reaches close to its pre-pandemic level. Nevertheless, due to the lifting of the sugar tax in Norway, which has made biscuits and cereal bars more affordable, and due to consumers now being used to shopping domestically during the COVID-19 pandemic not everyone might go back to shopping in Sweden.

Moreover, with consumers going back to busier lifestyles, they spend more time outside of their homes which also negatively affects demand. Due to their busy lives, fewer consumers treat themselves to biscuits and cereal bars – another negative driver of the market.

These changes, however, drive the demand for convenience products that can be consumed on-the-go. On the other hand, this means the demand for at-home consumption decreases. Snack bars, including cereal bars for instance, have been impacted positively as they are viewed to be a convenient and healthy snack that can be part of a lunch or a quick energy boost at the gym. Snack bars are also consumed throughout the day in between meals while studying or working from home. They are a very versatile snack in Norway. In particular protein and energy bars are doing well because they are highly popular with fitness and health enthusiastic consumers.

Purchase criteria

As it is the case for most products, the price is an important purchasing factor for consumers when it comes to biscuits and cereal bars. As the costs of food and energy increase in combination with the threat of growing inflation rates, consumers pay more attention to what they spend their money on. That said, price is not always the main criterion for Norwegian consumers as they are generally wealthy and can afford to purchase the items they like most. This means quality and taste are important purchase criteria. Well-off consumers pay the higher price points of higher quality items if that means they will enjoy them more.

What type of product is bought depends on the occasion or reason for purchase. Consumers who wish to indulge themselves are likely to purchase sweet biscuits. The most popular choice in this category are plain biscuits and cookies, followed by filled biscuits and chocolate coated biscuits. Consumers who look for a healthy snack often choose snack bars such as cereal bars because these are perceived to be healthier.

The pack size is important as well. Norwegian consumers who look for products to take home will probably choose larger pack sizes, whereas consumers who are in need of an on-the-go snack rather choose snack bars. Consumers who want to treat themselves while still limiting their calorie intakes are also more likely to purchase smaller biscuit pack sizes for example.

Recent market trends

Several trends are visible on the market at the moment:

- **Protein and energy bars:** Protein and energy bars are popular because of their widening appeal. As a result, manufacturers invest in marketing efforts to make their products appeal to the wider consumer base in Norway. One example is Orkla's Maxim brand. Many manufacturers also invest in product development and taste to make their protein and energy bars stand out.
- **Indulgence products:** Even though consumers indulge less after the COVID-19 pandemic, they want to enjoy it the most if they do. Norwegian consumers prefer sweet biscuits with layers of different sweet ingredients to indulge in. For example, Nidar Creamy Chocolate and Safari Cookie Dough are popular indulgence products.
- **Healthy ingredients:** Snack bars mainly appeal to health-conscious consumers, which is why their development focusses on creating healthy options with good and nutritious ingredients. Low-carb snack bars with high nut content such as Be-Kind from Mars are for example in demand. The brand pays attention to taste and nutrient density with products including Be-Kind Dark Choco Nuts & Sea Salt and Be-Kind Honey Roasted Nuts & Sea Salt.
- **Smaller pack sizes:** As consumers go back to their busier lifestyles and spend less time at home, smaller pack sizes are in demand. The health consciousness of consumers plays

a role as well because consumers exercise more portion control than during the COVID-19 pandemic. Portion sized products that can be eaten everywhere are high in demand.

- **Vegan products:** Even though demand for this kind of products remains a niche, it is likely to continue to grow as the number of people switching to more plant-based diets increases. The number of vegan products that are being introduced in the market is increasing. An example is the Maxim Vegan Crunchy Brownie.
- **E-commerce:** This channel remains a niche, however, is growing rapidly. Online sales are driven by the shift in the grocery shopping habits of consumers. Norwegians are getting used to purchasing fitness supplements online which also increased the amount of fitness related snacks being purchased online. Moreover, online grocery shopping is convenient as it saves time and snacks can often be purchased in bulk.

5.13.3 Offer

Domestic production

The biscuits and cereal bar market in Norway is strongly dominated by Orkla Confectionery & Snacks Norge, a domestic company with its headquarters in Oslo. The company holds close to 35% of the market by value mainly with its *Saetre* brand. Orkla Confectionery & Snacks' turnover accounts for about 15% of Orkla's total operating revenues. The company's products are very popular in Norway due to their well-known local brands and tastes that suit consumers in Nordic countries.⁴²

Mondelez Norge AS with close to 11% of the market share by value ranks second. This is mainly due to its popular *Freia* and *Oreo* brands. Even though Mondelez is a multinational company it has production facilities in Norway where it produces for example its *Freia* products in Oslo.

Scandza AS ranks third with a market share of over 6% due to its *Bisca* branded products. Scandza is a domestic company as well that has its headquarters in Oslo. It offers consumers iconic Scandinavian brands.⁴³

Regarding the sweet biscuit market alone, Orkla Confectionery Snacks Norge has a market share close to 48%, whereas Orkla Health AS heads the snack bar market with around 40%. Maxim is the leading brand in the snack bars category partly due to its large distribution in all grocery chains and its broad positioning.

Imports and exports

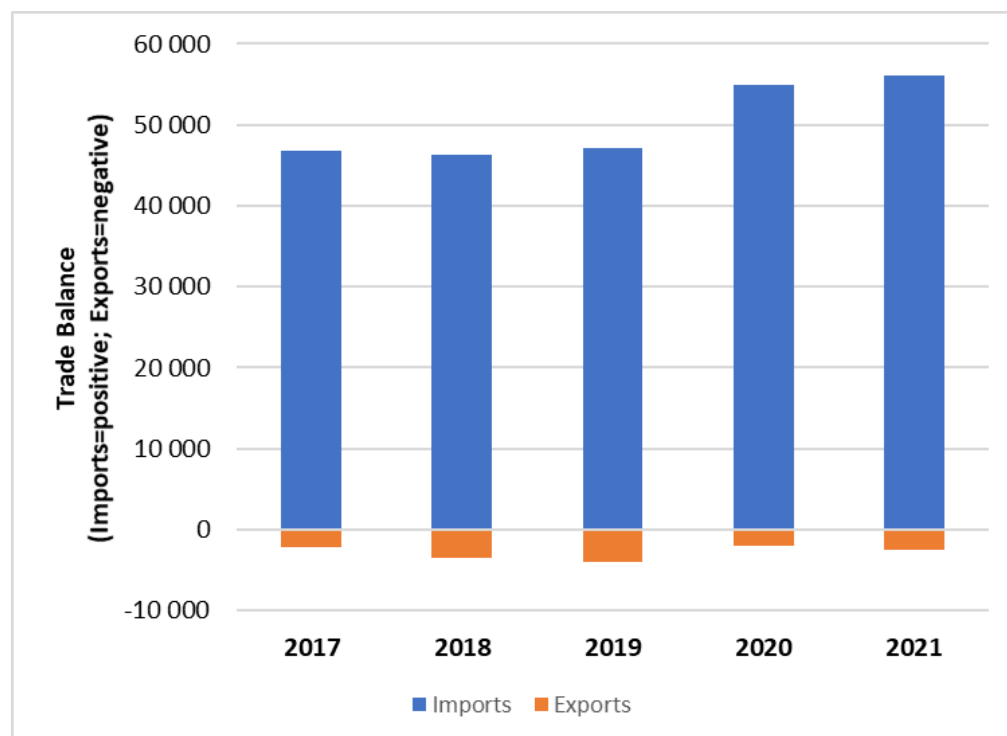
Figure 5-55 below shows that Norway is a strong net importer of biscuit and cereal bar products, importing a value of EUR 56 million in 2021 compared to exporting only about EUR 2.5 million. Between 2019 and 2021 imports increased by around EUR 10 million.

Figure 5-56 shows that Sweden was the largest exporter of biscuit and cereal bar products to Norway in 2021 with EUR 16 million. This was followed by the Netherlands with approximately EUR 10 million, and Germany with close to EUR 6 million. The EU in total accounted for close to 87% of the import market value in 2021. The main non-EU exporters are the UK and Turkey.

⁴² Orkla Confectionery & Snacks Norge, <https://www.orkla.com/about-us/orkla-confectioneryandsnacks/confectionery-snacks-norge/>

⁴³ Scandza, <https://www.scandza.com/>

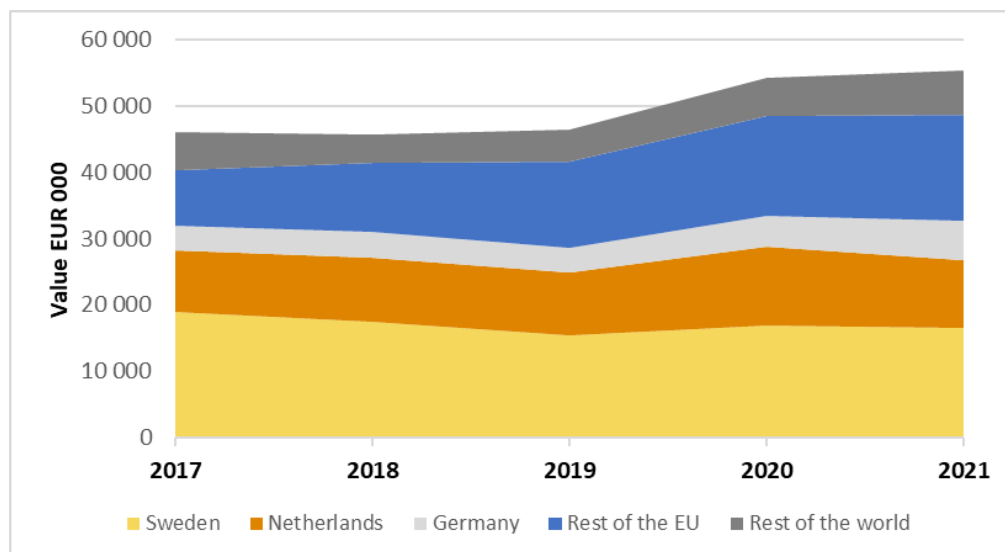
Figure 5-55: Trade balance (imports and exports) of biscuits and cereal bars in Norway, 2017-21 (EUR 000)



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 190531 and 190532

Figure 5-56: Norwegian imports of biscuits and cereal bars by country, 2017-2021 (EUR 000)



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 190531 and 190532.

EU GI products

As noted in section 4.2.4, Norway does not participate in the EU GI registration system for agricultural products and foodstuffs, as agriculture is not included in the EEA Agreement. As a result, registration is required in the national GI system of Norway, which is called Beskyttede betegnelser. Currently, no biscuits or cereal bars from the EU are registered under the Norwegian GI system.

Main competitors

The biscuits and cereal market in Norway is dominated mainly by domestic companies. Orkla Confectionery & Snacks Norge is the market leader with a share of nearly 35%. The multinational company Mondelez Norge AS ranks second with a market share of close to 11%, and the company has production facilities in Norway as well. Scandza AS, another local player, ranks third with a market share of over 6%.

The EU dominates the import market of biscuits and cereal bars in Norway as it accounts for around 8% of the total import market's value. However, the main non-EU exporters are the UK and Turkey.

5.13.4 Specific market entry requirements

Market access and custom procedures

Preferential trade with the EU and Norway is ruled by article 19 of the EEA Agreement. The Norwegian food legislation is harmonised with the EU, and import requirements are generally also the same as in the EU.

In addition to the general documentation requirements that are listed in Table 4-1 certain additional documents are needed. These include a notification to deal in agricultural goods and a registration of importers with the Norwegian food safety authority (Mattilsynet). Most documents can be in English or Norwegian.

Even though Norway is a member of EFTA tariffs and are variable. Sweet biscuits have a tariff of 0%. However, in addition an agricultural component is applied depending on the raw materials contained in the product. The actual duty rate is calculated individually by the Directorate of Agriculture. The tariff for waffles and wafers is at NOK 1.71 per kg. Both tariffs are more favourable than the MFN.

One major barrier relating to the trade of agricultural goods from the EU to Norway affecting biscuits and cereal bars stands out. EU export possibilities in processed agricultural products to Norway remain significantly impacted by high custom tariffs based on the EEA Agreement.

Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:

Main page – select product, country of origin and destination country:

<https://trade.ec.europa.eu/access-to-markets/en/home>

Example link – sweet biscuits (190531) from Poland to Norway

<https://trade.ec.europa.eu/access-to-markets/en/search?product=0406&origin=FR&destination=NO>

Standards

As a member of the EEA, Norway conforms with EU Regulation 178/2002 (General Food Law), which is the harmonized regulation setting out the general principles and requirements of the EU's harmonized food law. More information can be found in section 4.2.2.

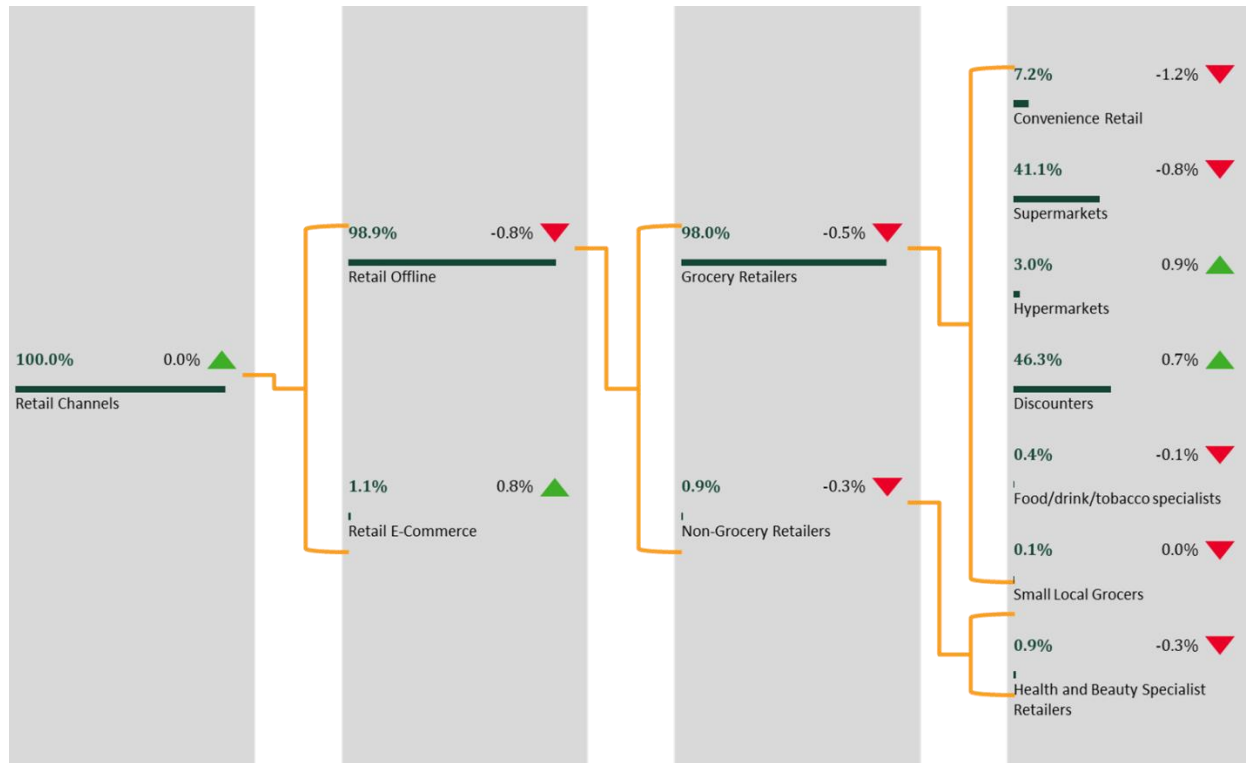
Labelling

The EU's legislation on general labelling and nutritional labelling is applied in Norway. EU requirements regarding food labelling are laid out in the FIC Regulation (EC) 1169/2011. Labels must be either in Norwegian, Swedish, Danish and sometimes Finnish language. More information on labelling can be found in section 4.2.3.

5.13.5 Distribution

Sweet biscuits distribution is focused mainly on offline retail which accounts for 98.9% of sales. E-commerce accounts for the remaining 1.1%, but this channel is growing rapidly: between 2017 and 2021 it increased by 0.8%. The main grocery retailers are discounters, which account for 46.3% of all sales and supermarkets with around 41.1%. The retail value of discounters has been increasing in recent years, whereas it has been decreasing for supermarkets. Convenience retail ranks third with a retail value of 7.2% (Figure 5-57). The popularity of convenience retail decreased as well.

Figure 5-57: Distribution channels of sweet biscuits in Norway (2021); retail value

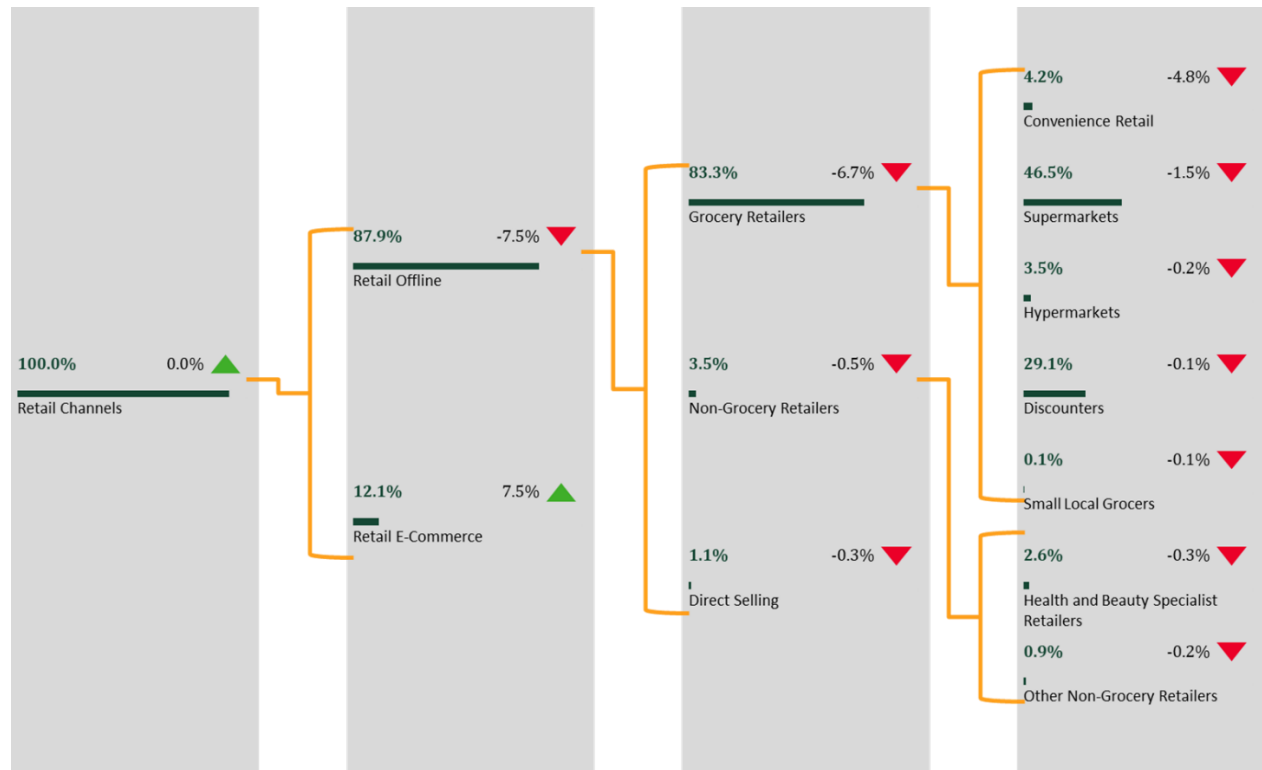


Source: Euromonitor International: Packaged Food, 2022.

Offline retail accounts for 87.9% of sales and e-commerce for the remaining 12.1%. The e-commerce channel is popular in the distribution of snack bars in Norway. It has been increasing by 7.5% between 2017 and 2021, which means its retail value more than doubled. However, supermarkets remain by far the most popular channel with about 46.5% of the retail value,

followed by discounters with 29.1%. The retail value of both channels declined during the last few years. Convenience retail ranked third with around 4.2% (Figure 5-58).

Figure 5-58: Distribution channels of snack bars in Norway (2021); retail value



Source: Euromonitor International: Packaged Food, 2022.

5.13.6 Challenges for EU products

In general, the biscuit and cereal market presents some very good opportunities for EU exporters because Norway is a net importer of these products and the EU dominates imports. However, the market is dominated by mainly local but also some international brands. In particular local brands are specifically suited towards Norwegian consumers. Thus, it is crucial to know the Norwegian market and the main consumer trends. It is also not easy to compete with very well-known brands from international producers.

Another challenge are the cross-border shopping habits of many Norwegian consumers who frequently go to Sweden to purchase these items instead of buying them locally.

Due to the strong health consciousness of consumers, it might be more complicated to introduce high-calorie products such as sweet biscuits to the market.

Market Takeaway: Biscuits and cereal bars

Consumption: The biscuit and cereal bar market had a value of EUR 173 million in 2022. The market is forecast to decline overall in the few coming years; however, snack bar consumption will increase.

Competition: Domestic and international players such as Orkla Confectionery & Snacks Norge, Mondelez Norge AS and Scandza AS are leaders in the market. The UK and Turkey are the biggest non-EU competitors in the import market.

Distribution: Sweet biscuits and cereal bars are largely distributed through modern grocery retailers such as supermarkets and discounters. Convenience retail and e-commerce sales are forecast to increase.

Challenges: Competing with domestic production which is in touch with the local market trends and increasingly caters for new demands such as healthier products. Cross-border shopping habits. Health consciousness limits the demand for high-calorie products such as sweet biscuits.

Opportunities: Demand for snack bars is forecast to continue to rise which in turn creates a key opportunity area in this market – the e-commerce channel in particular. Products of a healthier variety are also increasingly in demand. Smaller pack sizes stand out due to higher on-the-go product demand.

5.14 Baked goods

5.14.1 SWOT analysis

STRENGTHS (+)	WEAKNESSES (-)
- The market grew in the last few years, and it is forecast to continue to grow. - Norway is a strong net importer of baked goods. Imports by value increased year on year between 2017 and 2021. - The EU in total accounted for 94% of imports by value in 2021.	- Dessert mixes is the smallest category and forecast to decline. - The Norwegian market is comparatively small as the country is rather sparsely populated. - Many consumers purchase baked goods across borders such as in Sweden because prices are lower there.
OPPORTUNITIES (+)	THREATS (-)
- Norway has a high per capita bread consumption and bread has a long cultural history in the country. Demand for cakes is growing strongly. - Private label products dominate the market, however, there are also possibilities for artisanal products and other premium products, because demand for products made with good ingredients that are viewed to be healthy is increasing. - Supermarkets and discounters are the main channels of distribution that continued to grow in popularity in recent years. E-commerce is nascent but grows fast.	- The market is dominated by domestic privatelabel products that belong to the largest retailers Norgesgruppen, COOP, and Rema 1000. - Domestic artisanal premium production, which increased in popularity. - The main non-EU exporter was the UK, followed by China and the US.

5.14.2 Consumption

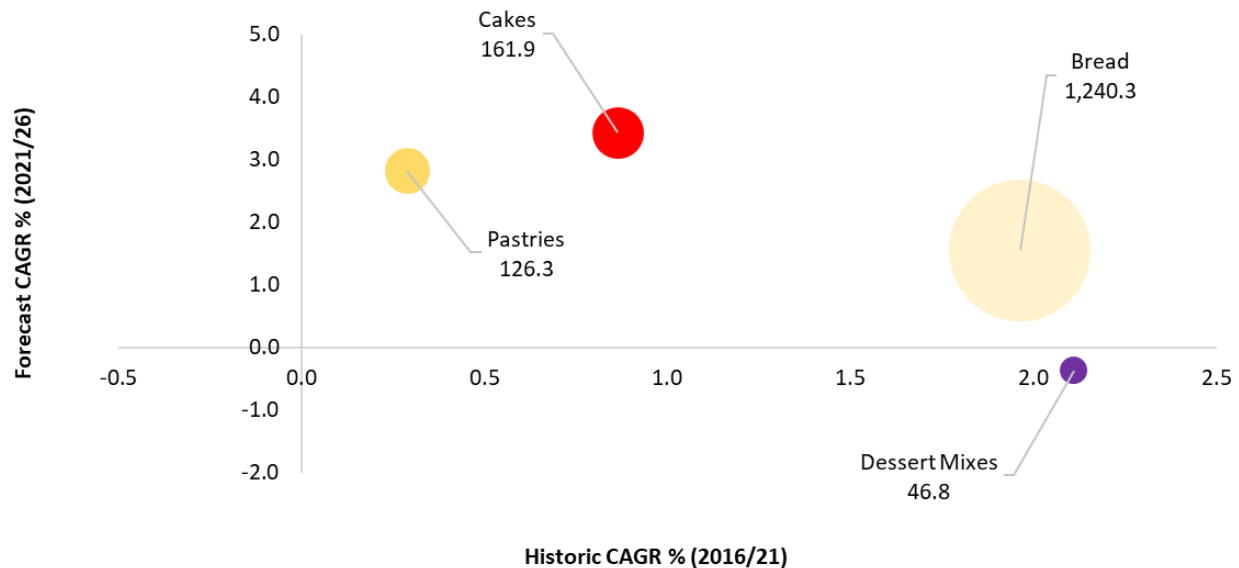
Evolution of consumption

Figure 5-59 depicts the evolution of the consumption of baked goods in Norway. In 2021, the total market size was close to EUR 1.58 billion. Bread was by far the most popular category with a market size of about EUR 1.24 billion and thus accounted for close to 80% of the total market. Cakes ranked second with close to 162 million, followed by pastries with over EUR 126 million. The market for dessert mixes was the smallest at close to EUR 47 million.

Historically, between 2016 and 2021 the market overall grew. Even though the market for dessert mixes is by far the smallest, this category grew with the strongest CAGR of about 2.1%; this was closely followed by the biggest category, bread, which grew at around 2.0%. Cakes grew at a CAGR of 0.9% and pastries at about 0.3%.

The baked goods market is forecast overall to continue to grow between 2021 and 2026. However, dessert mixes is set to decline at a CAGR of -0.4%. Cakes is forecast to have the highest growth at 3.4%, followed by pastries at 2.8%. The largest category, bread, is predicted to have a slower growth rate than in previous years at around 1.5%.

Figure 5-59: Evolution and forecast of the baked goods market in Norway, 2016-2026; total retail value (EUR million)



Source: Euromonitor International: Packaged Food, 2022.

Consumers

Baked goods include a lot of very different products from sweet to savoury which is why the consumer base is very diverse as well. Consumers from all genders, income types, social statuses and age groups consume baked goods.

Bread is more than a staple food in Norway as it is even seen as part of the country's national identity. Norwegian consumers eat over 38 kilograms of bread per capita per year. Thus, nearly all Norwegians are strong consumers of bread.

Pastries and cakes are consumed by all different consumer types as well, but are especially favoured as a treat, both by adults and children. Health-conscious consumers are less likely to consume these products as they are generally viewed to be less healthy than e.g. bread.

High-income consumers tend to consume premium and artisanal products, which are more likely to be unpackaged. Lower-income consumers are more likely to consume cheaper packaged bread, pastries, cakes etc.

Drivers and method of consumption

Even though most other food categories declined in retail value sales when COVID-19 related restrictions were lifted, this is not the case for baked goods. Norwegian consumers got into baking from scratch during the COVID-19 pandemic which negatively affected baked goods sales; however, now that they are going back to their busy lifestyles, they have less time to do so and have even developed some sort of 'baking fatigue'. This means consumers increasingly purchase bread, cakes and pastries again.

On the one hand, as consumers spend less time at home, they tend to have less breakfasts at home which negatively drives bread consumption (in particular leavened bread) in the morning.

On the other hand, they now take sandwiches ('skive') to the offices for lunch. Having bread sandwiches for lunch is called '*matpakke*' and is very common in Norway. The '*matpakke*' (food pack) culture is also popular with children who take sandwiches to school. As this is unlikely to change in the near future, bread consumption is likely to continue to be driven by this culture. Even the government is promoting healthy baked goods such as bread to get school children to eat better diets. Bread is consumed throughout the whole day not just for breakfast and lunch, but also for dinner e.g. as a side dish served with soup.

Wholegrain bread, such as '*grovbrød*' and '*kneippbrød*', are popular as well as '*landbrød*', which is made with wheat and rye. These types are consumed for all occasions. Commonly, Norwegians treat themselves to white bread ('*loff*') during the weekend or public holidays. Christmas bread ('*julebrød*'), which is rather sweet and filled with raisins, is a traditional Christmas treat. Norwegian bread is usually seasoned with different spices such as caraway seeds, orange zest, anis and honey.

Cakes are performing great, whereas the demand for pastries and dessert mixes declined because consumption habits overall returned to pre-pandemic patterns. Cakes are in demand because they are consumed in social situations as well as on-the-go-snacks. This means they suit consumers' busy lifestyles.

Due to the increasing health consciousness of consumers, high-calorie, as well as sugar and fat dense products, are not in demand.

Purchase criteria

Price and quality are important purchase criteria for consumers. Higher-income consumers are likely to pay higher prices for premium and artisanal products, whereas lower-income consumers probably pay more attention to the price. However, as Norway is a high-income country, many consumers opt for higher quality products.

The type of product plays a role as well. Bread is the most popular choice, followed by cakes, pastries, frozen baked goods, and dessert mixes. Consumers are more likely to purchase packaged over unpackaged products. However, unpackaged products usually are perceived as fresher and of higher quality. This means freshness is another criterion for some consumers.

Labels help consumers choose as well. Certain labels such as *Brødskalaen*, the nutrition label Keyhole and *Nyt Norge* promote premium products and domestic origin. Many consumers trust these labels and choose their products accordingly. Labels are likely to become more important as consumers continue to get more knowledgeable about food.

For health-conscious consumers ingredients are important. These consumers are unlikely to choose high calorie products and thus rather avoid cakes and pastries, or frozen baked goods. When it comes to bread, health-conscious consumers prefer high-fibre, low-carb, organic, gluten-free and high-protein products. However, any consumer who is looking to treat themselves is likely to purchase a sweet treat like a party or cake, even if they do not perceive it as healthy.

Moreover, some consumers prefer branded products, while others either do not mind or favour private label products due to their generally lower price point. However, many consumers purchase private label products because they dominate the market, whereas branded products are more of a niche.

Recent market trends

The following market trends are currently visible:

- **Private label products:** Private label baked goods are trending in Norway and dominate the market. The biggest private label bakeries belong to or collaborate with the main grocery players which include Norgesgruppen, Coop Norge Handel and Rema 1000 Norge. These large players mainly sell baked goods, in particular bread, from their own bakeries, which means there might be limited opportunities for branded products to be sold via these channels.
- **Bakeries and artisanal products:** Even though the market is dominated by private label products, the demand for artisanal products is growing as well. This is partly due to the local product trend. Unpackaged items are set to continue to grow because they are viewed to be more local, handmade, fresher and tastier. However, it is unlikely that this trend will be able to challenge private label baked goods in the coming years.
- **New launches and innovations:** The major grocery retailers continue to introduce new pack sizes, or products with new ingredients such as protein bread to the market. Many also continuously aim to improve nutrition labelling. By doing so they keep consumers interested in their products and can test out what works well and what does not.
- **The health trend:** This trend drives the development of healthier, low-carb, high-fibre, organic, gluten-free etc. varieties of baked goods as Norwegian consumers pay a lot of attention to what they put into their bodies. Mesterbakeren for example launched bread with a high content of vegetables. Products high in sugar and other unhealthy ingredients do not profit from this trend, which is why manufacturers try to come up with healthier varieties of these.
- **Premiumisation trend:** Norwegian consumers are interested in premium products and are willing to pay their higher price points. This trend can be linked to the health trend. Premium quality food often is viewed to be the healthier choice. Nutritional value labelling on higher priced products usually is a good incentive for consumers to purchase baked goods. The *Brødskalaen* logo for example can be used on bread labels and shows the exact whole flour or whole grain percentage.
- **E-commerce:** Even though e-commerce remains a niche, the channel continues to increase its share in value terms, partly because consumers got used to it during the COVID-19 pandemic related lockdowns. As many Norwegians enjoyed the convenience that this channel offered, they continue to use it post-COVID-19. Kolonial.no currently is Norway's largest online grocery retailer, which offers products from its in-house bakery '*Korn Bakeri*' since 2018. Kolonial.no offers next day delivery if products are ordered before 1 pm.

5.14.3 Offer

Domestic production

Grain has been an integral part of Norwegian culture for a long time. Centuries ago, when Norwegians first started to use it, it was referred to as '*Gudslånet*', which means it was something borrowed from God. In the times of the Vikings, Norwegians used flour to make flatbread called '*brauðiskr*' that was baked on a hot flagstone.

Most bread in Norway is made from oats, barley and wheat.⁴⁴ When agriculture started in Norway barley was the main crop and it still is today. Barley is grown on approximately 45% of Norway's land used for cereal production.⁴⁵ However, barley is not suited to the wet western climate, which is why oat always has been the main crop in the western part of the country. Oats are grown on about 25% of the cultivated area in Norway.⁴⁶ Wheat production mainly takes place in the south eastern part of the country because it requires warmer temperatures than barley and oats. Norway grows summer as well as winter wheat; winter varieties need good overwintering conditions. All wheat that is produced within the country is used for human consumption.⁴⁷

The Norwegian baked goods market is dominated by a few private label companies that belong to the major retailers. Bakehuset AS, which is part of Norgesgruppen, is the leader with over 13% of the market share. Coop Norge Handel AS with its Coop branded products ranks second with approximately 9%. Rema 1000 Norge works together exclusively with Mesterbakeren and thus accounts for 7% of the market share.

Din Baker AS, which is the only membership organisation for bakers and pastry chefs in Norway accounts for about 8% of the market share. It operates a chain of trade bakers and confectioners.⁴⁸

In recent years the number of artisanal bakeries has been increasing. The number grew from 69 bakeries in 2015 to 83 bakeries in 2018 and increased further since then.

Imports and exports

As shown in Figure 5-60, Norway is a strong net importer of baked goods. The country imported over 11 times more than it exported in 2021. Norway imported baked goods worth about EUR 294 million, whereas it exported about EUR 26 million. Between 2017 and 2021 imports of baked goods grew year on year and in total by around EUR 62 million. Overall, the value of exports increased as well during this period.

The main exporter of baked goods to Norway in 2021 was Sweden, with a value of around EUR 67 million. This was followed by Belgium with around EUR 44 million and Germany with close to EUR 38 million as shown in Figure 5-61. Nine out of the top ten exporting countries are from the EU. This also includes Denmark, France, Italy, Netherlands, Spain, and Poland. The EU in total accounted for 94% of Norwegian imports by value in 2021. The main non-EU exporter was the UK, as well as China and the US.

⁴⁴ Norwegians' favourite food: BREAD <https://www.visitnorway.com/things-to-do/food-and-drink/norwegian-bread/>

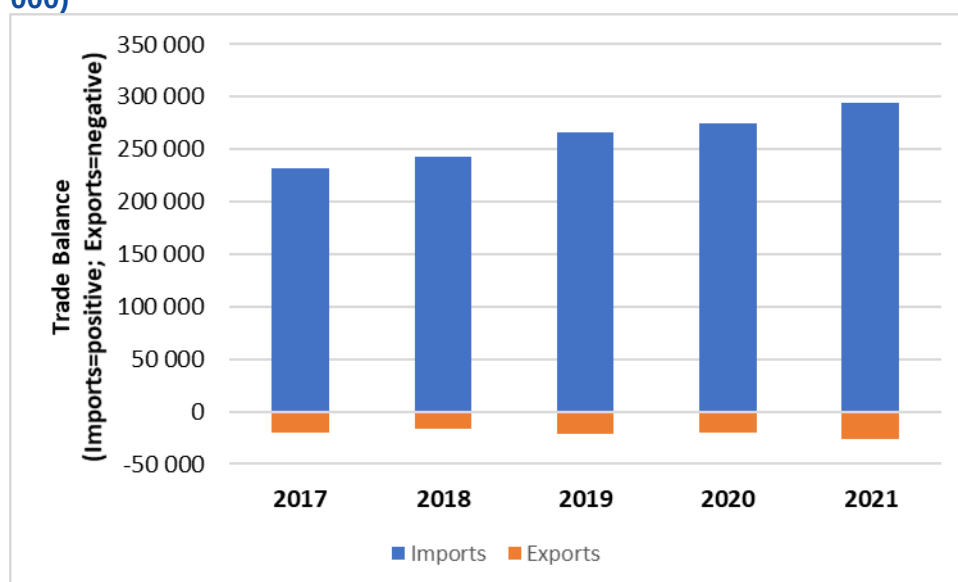
⁴⁵ Barley, <https://graminor.no/plant-breeding/cereals/barley/?lang=en>

⁴⁶ Oats, <https://graminor.no/plant-breeding/cereals/oats/?lang=en>

⁴⁷ Wheat, <https://graminor.no/plant-breeding/cereals/wheat/?lang=en#:~:text=Two%20types%20of%20wheat%20are,consumption%20comes%20from%20spring%20wheat.>

⁴⁸ Welcome to your baker (2022). <https://www.dinbaker.no/>

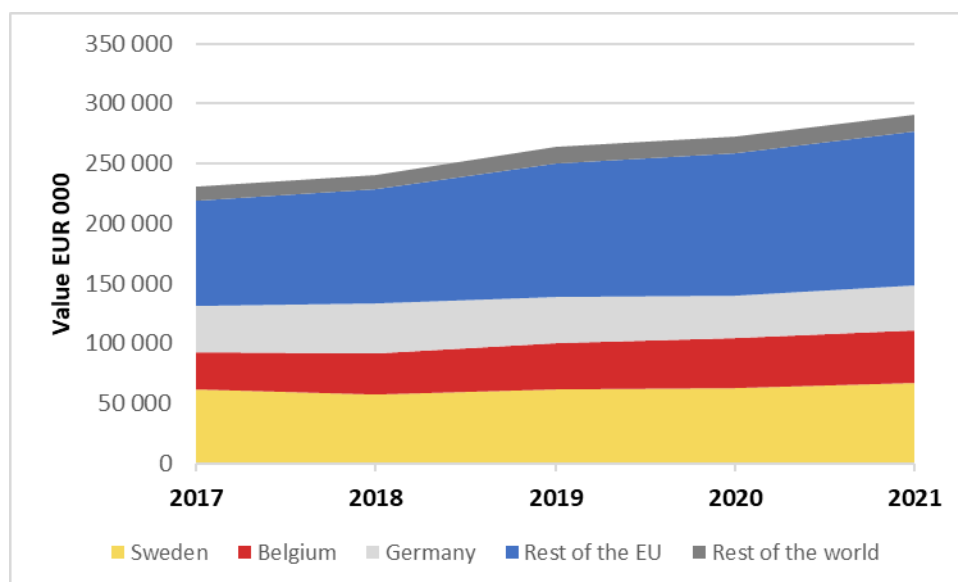
Figure 5-60: Trade balance (imports and exports) of baked goods in Norway, 2017-21 (EUR 000)



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 190590

Figure 5-61: Norwegian imports of baked goods by country, 2017-21 (EUR 000)



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 190590

EU GI products

As noted in section 4.2.4, Norway does not participate in the EU GI registration system for agricultural products and foodstuffs, as agriculture is not included in the EEA Agreement. As a result, registration is required in the national GI system of Norway, which is called Beskyttede

betegnelser. Currently, no baked goods from the EU are registered under the Norwegian GI system.

Main competitors

The Norwegian baked goods market is dominated by a few domestic private label companies that belong to the major retailers. Norway itself is producing ingredients such as barley and oat, but also some wheat. Bakehuset AS, which is part of Norgesgruppen, is followed by Coop Norge Handel AS with its Coop private label products. Rema 1000 Norge with its products from Mesterbakeren and Din Baker AS are strong competitors as well.

Artisanal production also competes with high quality premium products from the EU. The number of bakeries has been increasing in recent years.

Regarding imports, the EU dominates strongly as it accounts for around 94% of imports by value. The main non-EU exporter was the UK, followed by some distance by China and the US.

5.14.4 Specific market entry requirements

Market access and custom procedures

Preferential trade with the EU and Norway is ruled by article 19 of the EEA Agreement. The Norwegian food legislation is harmonised with the EU, and import requirements are generally also the same as in the EU. However, the EEA Agreement does not cover the EU common agriculture and fisheries policies or direct and indirect taxation.

In addition to the general documentation requirements that are listed in Table 4-1 certain additional documents are needed. These include a notification to deal in agricultural goods and a registration of importers with the Norwegian food safety authority (Mattilsynet). Most documents can be in English or Norwegian.

Even though Norway is a member of EFTA tariffs and are variable. Many tariffs are at 0% but additional agricultural components are applied depending on the raw materials contained in the product. Some other tariffs are higher, however, usually remain below the MFN.

One major barrier relating to the trade of agricultural goods from the EU to Norway affecting baked goods stands out. EU export possibilities in processed agricultural products to Norway remain significantly impacted by high custom tariffs based on the EEA Agreement. This impacts the trade of products such as bread, pastries and cakes.

Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:

Main page – select product, country of origin and destination country:

<https://trade.ec.europa.eu/access-to-markets/en/home>

Example link – baked goods (190590) from Poland to Norway

<https://trade.ec.europa.eu/access-to-markets/en/search?product=190590&origin=PL&destination=NO>

Standards

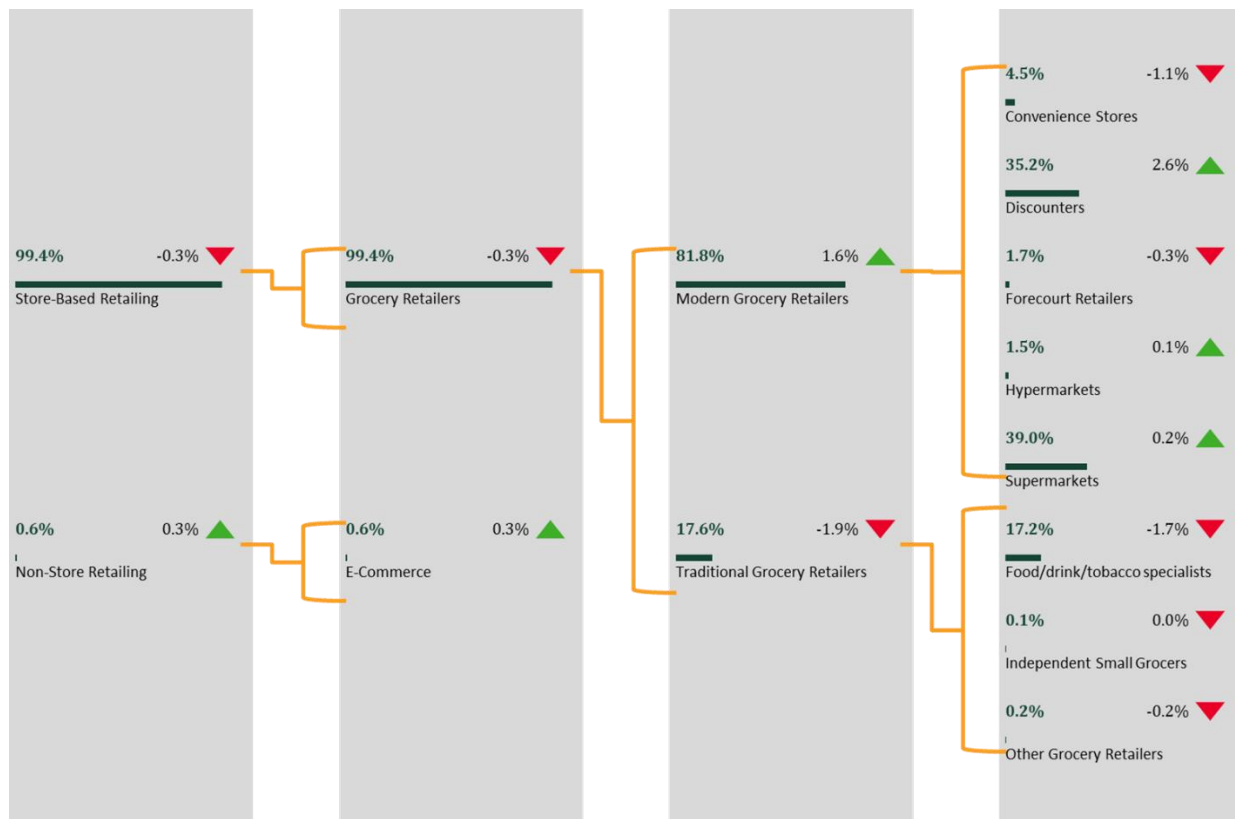
As a member of the EEA, Norway conforms with EU Regulation 178/2002 (General Food Law), which is the harmonized regulation setting out the general principles and requirements of the EU's harmonized food law. More information can be found in section 4.2.2.

Labelling

The EU's legislation on general labelling and nutritional labelling is applied in Norway. EU requirements regarding food labelling are laid out in the FIC Regulation (EC) 1169/2011. Labels must be either in Norwegian, Swedish, Danish and sometimes Finnish language. More information on labelling can be found in section 4.2.3.

5.14.5 Distribution

In 2021 nearly all retail value of baked goods came from store-based retailing (99.4%) as shown in Figure 5-62. The remaining 0.6% of the retail value came from e-commerce. Between 2017 and 2021 the e-commerce channel grew by 0.3%, which means the channel doubled its retail value. Modern grocery retailers overall gained popularity and accounted for about 81.8% of the retail value in 2021, whereas the popularity of traditional grocery retailers decreased to around 17.6% of the retail value. The two main modern grocery channels are supermarkets with about 39.0% and discounters with 35.2%. Both channels have increased their retail value in recent years. Food/drink/tobacco specialists are the most popular traditional grocery retailers with 17.2%, even though their popularity has been declining. The popularity of convenience stores is forecast to increase because people go back to their busy lifestyles and thus require more on-the-go snacks. Bakeries are forecast to grow their shares because of COVID-19 related restrictions such as hygiene rules or no tasting, that have been lifted.

Figure 5-62: Distribution channel overview of baked goods in Norway in 2021; retail value

Source: Euromonitor International: Packaged Food, 2022.

5.14.6 Challenges for EU products

The baked goods market in Norway is very well suited for EU products. This is shown by the fact that Norway is a net importer of baked goods and that the EU dominates this import market.

However, certain aspects should be kept in mind. As private label products dominate the market it might be challenging to introduce branded baked goods. Moreover, premium products from the EU have to compete with local artisanal production from different bakeries. Also, premium EU products must remain price competitive as they not only compete with artisanal production but also with the premium private label segment.

Another issue is that some consumers purchase baked goods from across the border (e.g. in Sweden) and not in the domestic market. Innovation and product development are crucial as well. Domestic manufacturers might know better what consumers want, which makes it important to do research and keep up with the latest consumer trends. In addition, the Norwegian market is not very well suited for high-calorie products as consumers are very health conscious.

Market Takeaway: Baked goods

Consumption: The baked goods market in Norway had a size of about EUR 1.58 billion in 2021, of which close to 80% was accounted for by bread. The market is forecast to continue to grow.

Competition: The market is dominated by domestic private label products that belong to the main retailers including Norgesgruppen, COOP, and Rema 1000. Artisanal bakeries are a competition for premium products. The UK is the main non-EU competitor in the import market.

Distribution: Mainly via modern grocery channels such as supermarkets, and discounters. E-commerce is in a nascent but growing phase.

Challenges: Price competition, keeping up with recent domestic trends, cross border shopping, and high-calorie products because of the health consciousness of consumers.

Opportunities: Bread and cakes. Offering products with healthy nutritious ingredients of premium quality, supplying private label companies, and using e-commerce.

5.15 Ice cream

5.15.1 SWOT analysis

STRENGTHS (+)	WEAKNESSES (-)
- Overall, the market grew during the last few years and some categories are forecast to continue to grow. - Norway is a net importer of ice cream. - The EU in total accounted for close to 92% of ice cream imports to Norway.	- The largest market for take-home ice cream (70% of the total) is forecast to decline. - Some more indulgent variants of EU ice cream may come under threat from a rise in demand for healthy ice cream in Norway. - Increasing food prices and the threat of inflation might impact consumers' choices.
OPPORTUNITIES (+)	THREATS (-)
- Premium and economy-priced ice cream is in demand. Premium for consumers looking for high quality products and economy for consumers who look for cheap indulgence. - Healthy and sustainable plant-based products increase in demand. - Nostalgic re-introduced old classic ice cream brands are doing well on the market.	- The ice cream market in Norway is strongly dominated by two domestic players: Hennig-Olsen IS AS and Diplom IS AS who together have a market share of 88%. - The main non-EU exporters are the US and the UK. - Artisanal ice cream production is a potential threat to premium EU products.

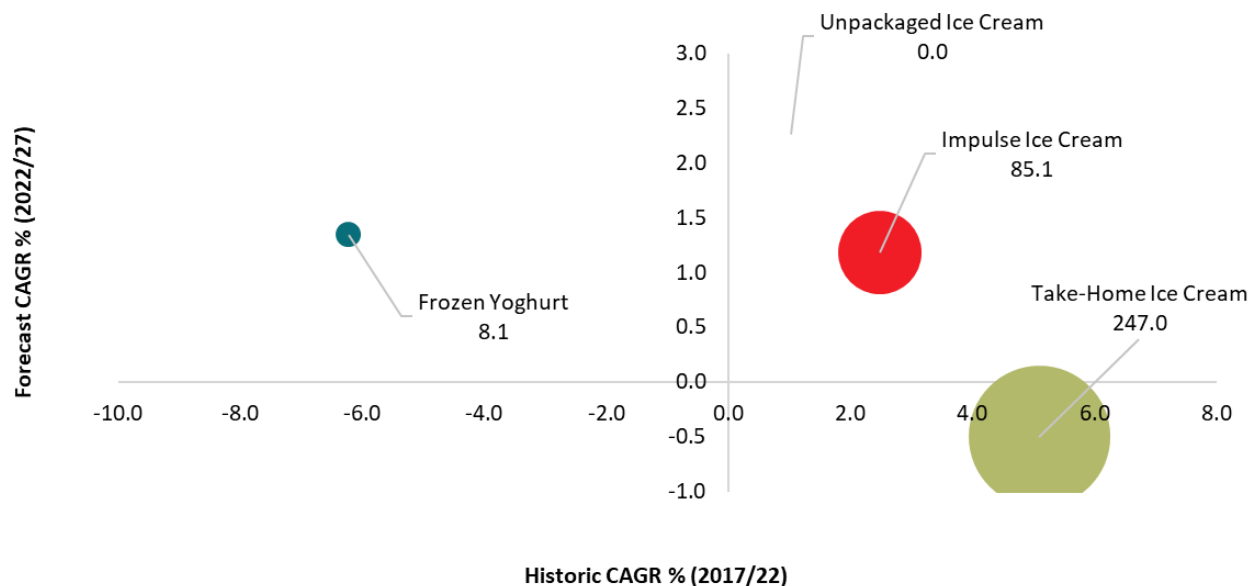
5.15.2 Consumption

Evolution of consumption

The ice cream market had a size of EUR 340 million in 2022. The take-home ice cream category had by far the biggest market size of around EUR 247 million as depicted in Figure 5-63. Take-home ice cream thus made up over 70% of the total ice cream market in 2022. Impulse ice cream ranked second with over EUR 85 million, followed by frozen yoghurt with more than EUR 8 million. The market for unpackaged ice cream was nearly non-existent.

Overall, the market grew between 2017 and 2022, except for frozen yoghurt, which decreased at a CAGR of -6.2%. The largest category, take-home ice cream, grew at the fastest CAGR of about 5.1%. However, this market is forecasted to decline between 2022 and 2027, at a CAGR of 0.5%. Impulse ice cream is forecast to grow at a CAGR of 1.2%, as is also the unpacked ice cream market which is currently nearly non-existent but is forecast to grow faster than all categories at 2.3% per year.

Figure 5-63: Evolution and forecast of the ice cream market in Norway, 2017-2027; retail value (EUR million)



Source: Euromonitor International: Packaged Food, 2022.

Consumers

Ice cream consumption is not new to Norway, and domestic ice cream manufacturers already have been around for quite some time. Per capita consumption of ice cream in Norway is currently quite high at 8.4 kilograms, which shows that Norwegians of all ages and social groups consume ice cream. Ice cream is particularly popular with children during a hot summer day, but nevertheless, older consumers enjoy a cold refreshing treat as well. Health-conscious and sustainable consumers tend to purchase healthier varieties or even vegan ice cream, whereas children and consumers looking for a simple sweet treat do not mind calorie dense products.

Drivers and method of consumption

During the COVID-19 pandemic, the demand for ice cream increased as people stayed at home during the summer months. COVID-19-related restrictions in the foodservice sector also positively drove consumers to eat ice cream at home.

This changed now that restrictions are lifted, and people go back to travelling during the summer. As the summer months are the main months for ice cream consumption in Norway, demand decreased because many consumers go on vacation abroad and do not purchase as much ice cream domestically. With the reopening of the foodservice sector, more consumers switched back to getting ice cream from these outlets on-the-go, which also negatively affected demand. The overall ice cream demand is forecast to continue to decline in the coming years.

People now spend much more time outside the home and are on the go a lot, which positively drives the demand for single-portion ice cream. On the contrary, this means consumers purchase fewer large ice cream packs for at-home consumption.

As Norwegian consumers are very health conscious, they tend to want to eat less but better, which means they shift towards smaller, premium and also plant-based ice cream varieties.

Purchase criteria

Price plays an important role. While there are many offers in the mid-priced segment consumers increasingly opt for either premium or economy ice cream. Consumers opt for economy ice cream, which also includes many private label products, because of its cheaper price point so they can save money. Well-off consumers who look for a qualitative treat rather choose premium products and thus pay the higher price point.

Portion sizes are being considered as well. Consumers that are on the go or aim to decrease their calorie and sugar intake might choose single portion ice cream, whereas consumers who want to bring ice cream home rather purchase larger pack sizes or multi-packs. The occasion plays a role here as well. If a consumer buys ice cream for the whole family the sizes will differ compared to a single consumer just wanting a quick treat.

Flavour is probably one of the most important criteria. The most popular flavours are classic ones such as vanilla and chocolate. Fruity flavours are enjoyed as well, such as berries, strawberries, mixed fruits, lemon and orange. Other demanded flavours also include nuts, caramel and brownie.

Dairy ice cream is purchased more than water ice cream. Ice cream generally is mainly purchased in bulk followed by multipacks. Consumers prefer impulse ice creams in cones rather than on sticks.

Recent market trends

The following recent trends are visible in the Norwegian ice cream market:

- **Premium and economy products:** New launches on the ice cream market in Norway are usually either in the premium or economy price segment. The latter also includes many private label products. Mid-priced ice cream such as Diplom Is Lollipop decreased slightly in demand. Either consumers choose healthier or more indulgent premium ice cream products or they aim to save money and thus choose economy options that often also include private label products. This trend is likely to continue as the market becomes more polarised due to for example rising costs.
- **Health trend:** Norwegian consumers are very health conscious, which is why demand for healthier ice cream options is increasing. Sugar-free, lower calorie, premium sorbets and smaller pack sized single serve ice creams are popular. New products in this category continue to be launched. Hennig-Olsen for example launched a smaller version of its well-known ice cream cone, and the brand also introduced a new strawberry flavour with an 80% fruit content.
- **Nostalgic products:** Old classics are trending as well. The two biggest producers in Norway, Diplom Is and Hennig-Olsen, both re-introduced old classic ice cream lines in a limited-edition format recently. One example that became a success is *Kræsje Pink* (Diplom), which became the number one impulse ice cream in the market for some time. The reason for this is its originality, its interesting brand name which means “crash pink” and its uncommon flavour which is a combination of grape and pineapple and sold on a chewing gum stick. Hennig-Olsen re-introduced its old *SvalBar* back in the market as well.

- **Importance of flavours and textures:** Manufacturers keep coming up with new and innovative flavours and textures to keep consumers interested. This means manufacturers constantly release new varieties of products.
- **Plant-based ice cream:** Due to the growing demand for sustainable production of products, plant-based ice creams rise in demand. Some consumers aim to reduce their dairy consumption. The category is forecast to grow very fast during the next few years, although from a very small base. Hennig-Olsen launched its new vegan ice cream brand called *Idyll* which is even certified by the Rainforest Alliance. Labels like these attract sustainable consumers to try vegan ice cream. Nonetheless, to be successful in the plant-based market in Norway the ice cream needs to also have an excellent flavour and texture that please consumers.

5.15.3 Offer

Domestic production

The ice cream market in Norway is strongly dominated by two domestic players: Hennig-Olsen IS AS and Diplom IS AS.

Hennig-Olsen IS AS is the market leader with a market share of around 47% due to its *Hennig-Olsen* branded ice cream products. Hennig-Olsen is known to be the oldest ice cream manufacturer in Norway that offers premium quality ice cream based on traditional recipes that are over 90 years old. The company produces around 30 million litres of ice cream and frozen desserts annually in its factory in Hannevika, which is just outside Kristiansand. Hennig-Olsen employs around 230 people and has several regional offices across the country besides its headquartered in Kristiansand.⁴⁹

Diplom AS is another strong domestic player with a market share of about 41% due to its *Diplom* branded products. Diplom-IS AS is a subsidiary of TINE SA. The company is owned by Norwegian dairy farmers from across the country and its ice cream factory is located in Nittedal. Their ice cream flavours already have been loved for generations.⁵⁰

In recent years Hennig-Olsen IS AS slightly increased its market share, whereas the share of Diplom IS AS slightly decreased.

Moreover, there are small-scale artisanal ice cream shops (both dairy and water-based) in Norway that sell their products on their premises.

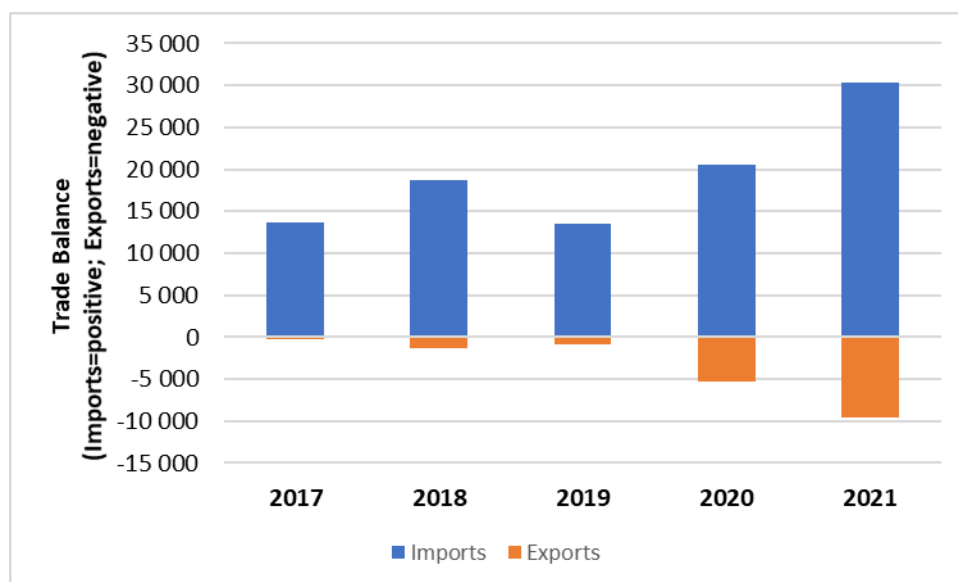
Imports and exports

Norway is a net importer of ice cream as shown in Figure 5-64. In 2021, Norway imported ice cream worth EUR 30 million, which is significant growth from the EUR 14 million it imported in 2017. Norway's ice cream imports as well as exports increased significantly in 2020 and 2021. Norway exported ice cream with a value close to EUR 10 million in 2021.

⁴⁹ About us, <https://www.hennig-olsen.no/en/about/>

⁵⁰ Company, <https://www.diplom-is.no/om-oss/selskapet>

Figure 5-64: Trade balance (imports and exports) of ice cream in Norway, 2017-21 (EUR 000)



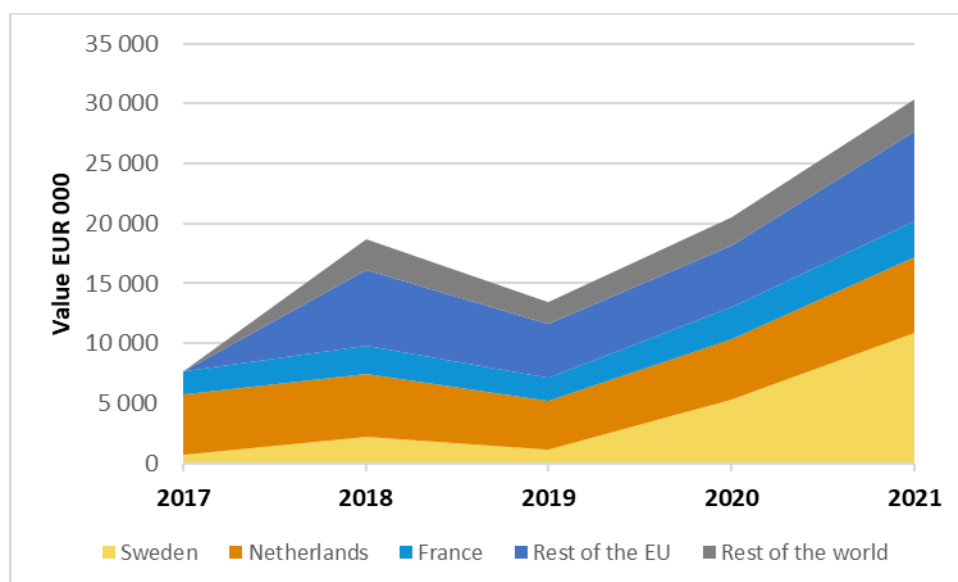
Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 2105.

The largest exporters of ice cream to Norway are Sweden, the Netherlands and France (Figure 5-65). Sweden exported ice cream with a value close to EUR 11 million in 2021, and thus accounted for around 37% of the total import market. The Netherlands exported over EUR 6 million and France around EUR 3 million. The EU in total accounted for close to 92% of ice cream imports to Norway. The main non-EU exporters are the US and the UK.

The world's unit value of ice cream exports to Norway was around EUR 6 300 per tonne in 2021 as depicted in Figure 5-66. The unit value of ice cream from France was slightly higher than the global average at EUR 6 500 per tonne. On the other hand, the unit value of ice cream from the Netherlands was considerably lower than the world average, at just under EUR 3 700 per tonne. Both the unit value of ice cream from France and that from the Netherlands have been quite stable between 2017 and 2021. The unit value of ice cream from Sweden, on the other hand, increased drastically between 2019 and 2021, reaching EUR 18 200 per tonne in 2021.

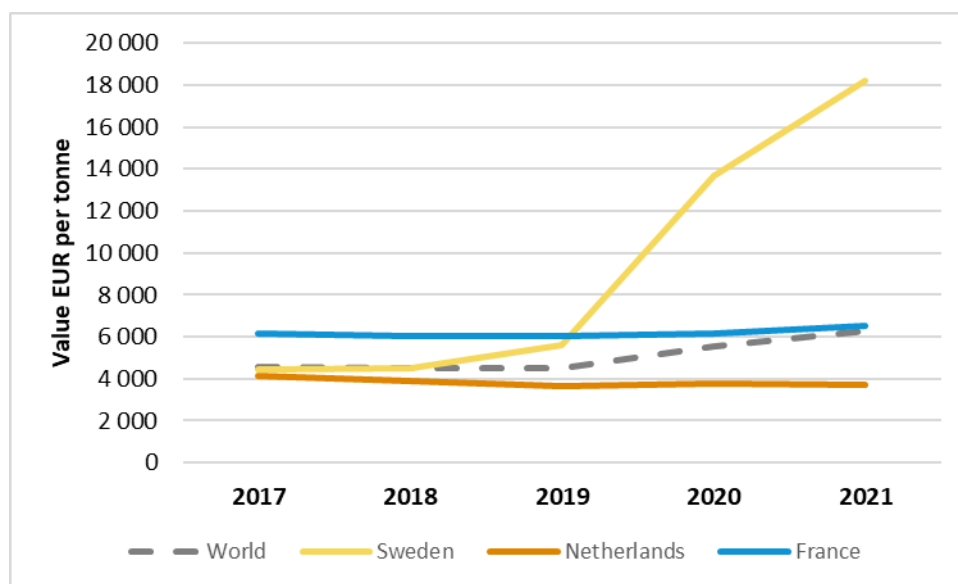
Figure 5-65: Norwegian imports of ice cream by country, 2017-21 (EUR 000)



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 2105.

Figure 5-66 Unit value of Norwegian imports of ice cream by country, 2017-21 (EUR per tonne)



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 2105.

EU GI products

As noted in section 4.2.4, Norway does not participate in the EU GI registration system for agricultural products and foodstuffs, as agriculture is not included in the EEA Agreement. As a

result, registration is required in the national GI system of Norway, which is called Beskyttede betegnelser. Currently, no ice cream from the EU is registered under the Norwegian GI system.

Main competitors

The ice cream market in Norway is strongly dominated by two domestic players: Hennig-Olsen IS AS and Diplom IS AS who together have a market share of 88%. Moreover, EU premium products also compete with small artisanal local manufacturers.

However, Norway is also a strong net importer of ice cream. The EU accounts for close to 92% of the ice cream import market value in Norway, which limits competition. Nevertheless, the main non-EU exporters that compete with the EU are the US and the UK.

5.15.4 Specific market entry requirements

Market Access and Entry

Preferential trade with the EU and Norway is ruled by article 19 of the EEA Agreement. The Norwegian food and veterinary legislation is harmonised with the EU, and import requirements are generally also the same as in the EU. However, the EEA Agreement does not cover the EU common agriculture and fisheries policies or direct and indirect taxation.

In addition to the general documentation requirements that are listed in Table 4-1 certain additional documents are needed. These include a notification to deal in agricultural goods and a registration of importers with the Norwegian food safety authority (Mattilsynet).

Even though Norway is a member of EFTA tariffs and are variable. Some ice cream has 0% tariffs while others have tariffs around NOK 4 per kg. Tariffs for EU products are better than the MFN.

One major barrier relating to the trade of agricultural goods from the EU to Norway affecting ice cream stands out. EU export possibilities in processed agricultural products to Norway remain significantly impacted by high custom tariffs based on the EEA Agreement.

Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:

Main page – select product, country of origin and destination country:

<https://trade.ec.europa.eu/access-to-markets/en/home>

Example link – ice cream (2105) from Netherlands to Norway

<https://trade.ec.europa.eu/access-to-markets/en/search?product=2105&origin=NL&destination=NO>

SPS measures

There are currently no specific SPS related challenges concerning ice cream containing dairy products. More information can be found in section 4.3.4.

Standards

As a member of the EEA, Norway conforms with EU Regulation 178/2002 (General Food Law), which is the harmonized regulation setting out the general principles and requirements of the EU's harmonized food law. More information can be found in section 4.2.2.

Labelling

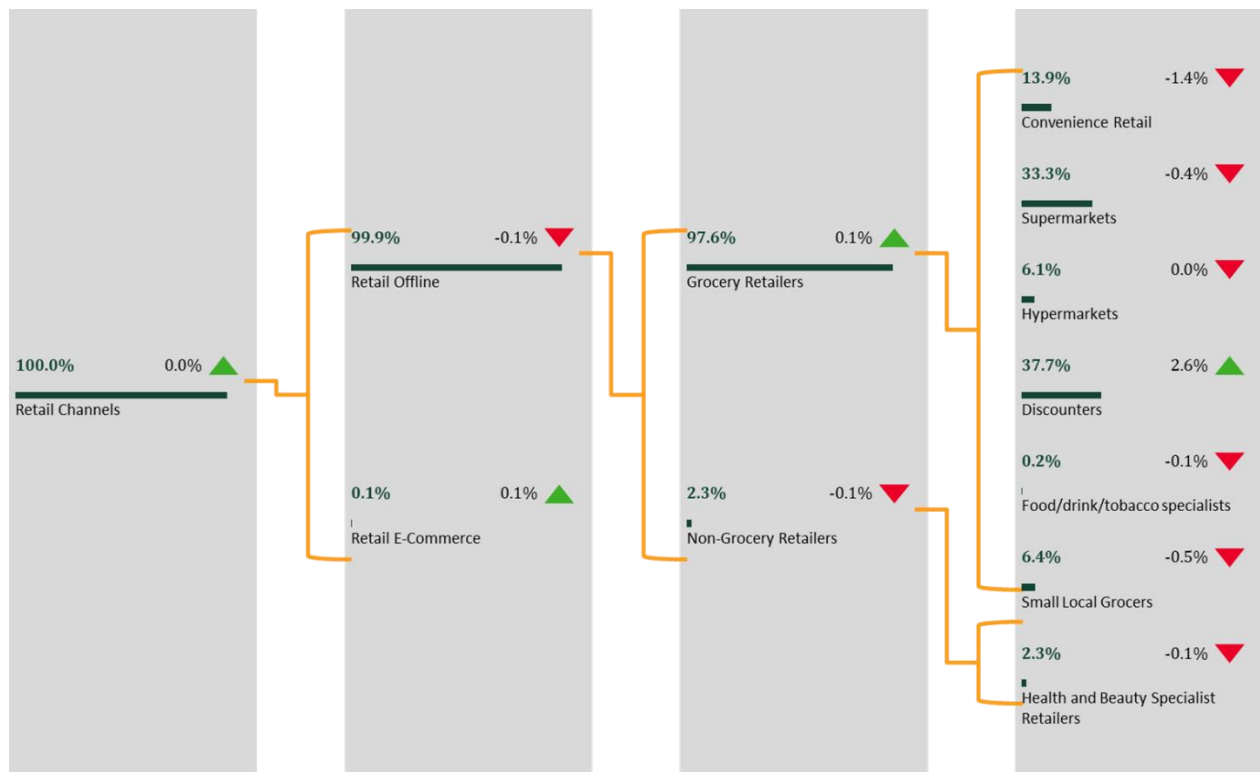
The EU's legislation on general labelling and nutritional labelling is applied in Norway. EU requirements regarding food labelling are laid out in the FIC Regulation (EC) 1169/2011. Labels must be either in Norwegian, Swedish, Danish and sometimes Finnish language. More information on labelling can be found in section 4.2.3.

5.15.5 Distribution

As shown in Figure 5-67 grocery retailers make up the majority of ice cream sales in Norway with a 97.6% share of sales. In 2021, discounters accounted for 37.7% of sales followed by supermarkets which accounted for a 33.3% share. The popularity of discounters has been increasing in recent years, whereas the popularity of supermarkets as a channel has been declining. Convenience retail ranked third in 2021 with a retail value share of 13.9%. E-commerce hardly played a role, at 0.1% of sales.

Convenience retail has been increasing in popularity because people spend less time at home, which increased the demand for single portion impulse ice creams. Convenience stores usually offer the same ice cream types as grocery retailers but have a higher share of single portion options as well as plant-based options.

E-commerce is likely to remain a niche because of the logistics behind delivering ice cream to consumers. However, it is forecast to continue to grow mainly because of take-home ice cream.

Figure 5-67: Distribution channel overview of ice cream in Norway (2021); retail value

Source: Euromonitor International: Packaged Food, 2022.

5.15.6 Challenges for EU products

The ice cream market in Norway is well-suited for products from the EU because Norway is a net importer of ice cream and EU products already dominate the ice cream import market. However, the market is strongly dominated by domestic producers Hennig-Olsen and Diplom, which both have a long-standing history in the Norwegian ice cream market. Their products are iconic and known all over the country. This makes it harder for new EU products to enter the market. To be successful it is important to be up-to-date with current trends and know exactly what Norwegian consumers demand. Moreover, EU premium products also compete with small artisanal local manufacturers that can be found in different areas of Norway. Increasing food prices and the threat of further inflation might impact consumers' choices.

Market Takeaway: Ice cream

Consumption: The ice cream market had a size of EUR 340 million in 2022. Take-home ice cream is by far the largest market (70%) but is forecast to decline in coming years, while impulse ice cream is forecast to grow at a faster pace.

Competition: The market is strongly dominated by Hennig-Olsen IS AS and Diplom IS AS, which are domestic companies. Local small-scale artisanal production. Competition in imports from non-EU countries is relatively limited and comes from the US and the UK.

Distribution: Mainly through store-based grocery retailers such as discounters and supermarkets. Convenience retail forecast to increase in popularity.

Challenges: Strong competition from Norwegian ice cream products combined with high-quality artisanal production. Ongoing price increases and the threat of inflation.

Opportunities: A rise in demand for healthy ice cream and non-dairy ice cream, as well as a rise in demand for premium and economy priced ice cream, and nostalgic ice cream.

6 Communication

6.1 Communication strategy

Companies wanting to market products and advertise in Norway have different channels to consider. The aim of this section is to breakdown each section of the mass media landscape in Norway and to introduce the main communication channels (new and traditional media, as well as fairs) available in the country; as well as to provide a brief overview of key regulations for the advertisement of food and beverages.

6.1.1 Online & digital media

Online media usage in Norway is quite high. An estimated 98% of the population has access to the internet, due to a large effort from the Norwegian government in recent decades to expand communications infrastructure in order to increase interconnectivity. A further estimated 96% of mobile phone users have a device capable of connecting to the internet.

The average usage of the internet per day by Norwegians is estimated to be 6 hours and 50 mins⁵¹ which is roughly in line with usage in European Union countries. Larger digital advertising agencies tend to focus on the Oslo market and the cities located along the coast such as Trondheim, Bergen and Stavanger. Norway utilises two written variations of the Norwegian language, Bokmal and Nynorsk; Bokmal is overwhelmingly utilised with 85-90% of the population preferring this written script.

Digital advertising agencies may provide companies with support to develop a successful digital marketing strategy. The box below shows examples of some larger digital advertising companies that are in operation in the Norwegian market.

Notable Norwegian Digital Advertising Agencies:⁵²

Netron - <https://netron.no/>

Synlighhet - <https://synlighet.no/>

Multimedia Nordic AS- <http://multimedianordic.no/en/>

Semway - <https://semway.no/>

Inevo- <https://inevo.com/>

Social media platforms

Against the background set out above of the increasing importance of digital media in Norway, social media has emerged as a key marketing channel in the country for food and beverages.

⁵¹ Internet usage in Norway in 2022, by activity, Statista, available at <https://www.statista.com/statistics/568401/internet-usage-in-norway-by-activity/>

⁵² Top Digital Marketing Companies in Norway - <https://clutch.co/no/agencies/digital-marketing>. Note: agencies mentioned are for information only. Due diligence will have to be performed for the companies as no warranty is given as to the standing of these individuals, organisations or firms, and no corresponding responsibility or liability is accepted by the authors.

This is aided also by the rise in e-commerce usage which generally is linked to the more popular social media platforms in Norway such as Facebook, Instagram and Twitter, in line with popular platforms generally used in the EU. There are an estimated 4.75 million Norwegians with social media accounts (representing 80% of the population).

Social media usage is particularly popular among younger consumers and is less associated with older consumers. Older consumers are more accustomed to using traditional media outlets such as newspapers and the radio which also tend to focus on regional issues, while social media tend to focus on Norway-wide issues.

Some more key statistics around social media usage include:

- 97% of social media users will visit their account at least once a month.
- The average amount of time spent on social media comes to roughly 3 hrs and 20 mins a day.
- Work purposes are a growing need within social media usage, with 42% of users using social media for this purpose.
- 95% of social media users access their accounts via a mobile device.⁵³

YouTube

YouTube is a popular platform in Norway and is the largest video-sharing website in the country. It is estimated that 84.2% of the Norwegian population will watch at least one YouTube video per week and the viewership of YouTube is split evenly between males and females. The use of YouTube to showcase food and beverages from abroad is high, with many of the larger food and beverage-oriented YouTube channels showcasing both domestic and foreign products.

Notable YouTube food-orientated channels in Norway

AmeriNorge- [youtube.com/@AMERiNORGE/videos](https://www.youtube.com/@AMERiNORGE/videos)
Chef Norway- <https://www.youtube.com/@ChefNorw/videos>
Norwegian Food - <https://www.youtube.com/@norwegianfood9489>
Thanks for the food - <https://www.youtube.com/@Thanksforthefoodtheblog/videos>
Sunny - <https://www.youtube.com/@ihascakes/videos>

Facebook (Meta)

Facebook is the most popular social media platform in Norway, with roughly 3.3 million Norwegians (equivalent to roughly 60% of the population) having a Facebook account. Again, the usage of Facebook is split roughly down the middle between both males and females. The use of Facebook marketplace has also grown in recent years and is commonly used to advertise grocers selling food and beverage products.

Instagram

Instagram is also very popular in Norway, being commonly used to advertise goods and services in the country, particularly among the younger generation. The role of influencers acting through Instagram has grown to become normalised as is also the practise in other western European countries. Because of this, influencers are increasingly important in the advertising sector of the country. Norwegian influencers with a large social media following typically speak in English in an

⁵³ Digital market report – Norway, Hootsuite, available at <https://datareportal.com/reports/digital-2022-norway>

effort to reach a wider audience; this helps potential international advertisers to target the right channels for their products.

Top Food Instagram influencers in Norway

Trinesmatbloggg - <https://www.instagram.com/trinesmatblogg>
 Idagranjansen - <https://www.instagram.com/idagranjansen>
 Katarina Sollid - <https://www.instagram.com/katarinasollid>
 Mat pa bordet - <https://www.instagram.com/matpaaborde>
 Oslonam - <https://www.instagram.com/oslonam>

Other platforms

The above three platforms are the most popular in Norway. However, Twitter, TikTok and WhatsApp are also popular platforms used by around half of internet users. Most users of social media platforms will be readily exposed to targeted advertisements relating to food and beverages making the social media space a key area of interest for food and beverage producers.

Food blogs

Another interesting option to promote EU food products in Norway is to work closely together with food bloggers. There are possibilities to hire food bloggers and to ask them to promote certain products on their blogs.

Well-known food bloggers are influencers as well and increasingly cross over between written blogs and several social media accounts. This diversity of channels used also diversifies the exposure of a product on several platforms. Indeed, many of the top YouTube and Instagram pages for food in Norway identified above also have blogs.

The box below contains a selection of notable food bloggers in Norway, though this list is not exhaustive and certain blogs may be particularly relevant for certain food and beverage products.

Selected top Norwegian Food Bloggers

North wild kitchen- <https://northwildkitchen.com/>
 Outside Oslo - <https://outside-oslo.com/>
 Thanks for the food - <http://thanksforthefood.com/>
 Arctic Grub - <https://arcticgrub.com/>

6.1.2 Traditional media

Historically, traditional media has been an extremely important channel of information distribution in Norway, as the isolated pockets of towns across the country often had to rely on radio or TV announcements to remain informed about developments occurring across the country. The rise of the internet coupled with improved transportation and communications infrastructure has led to increased interconnectivity in the country, reducing the isolation of towns and by extension reducing the reliance on traditional media as a means of information distribution.

Newspapers remain popular but largely regionalised in Norway with only a handful of newspapers focusing on nationwide distribution. The most distributed newspapers nationwide in Norway as of 2022 are Dagbladet, Dagens Naeringsliv and Aftenposten. Large, regionalised newspapers in the country include the Stavanger Aftenblad, Oppland Arbeiderblad and Adresseavisen. Most newspapers are published in Norwegian, although smaller outlets produce newspapers in the Sami language or in English aimed at immigrants working in Norwegian cities.

Radio in Norway remains a popular outlet for information distribution, particularly in the northern regions where it is the principal outlet of information distribution. The largest radio media group in operation in the country is Norsk Rikskringkasting AS (NRK) which is the state-owned broadcaster of the country. Norwegians pay a license fee which helps NRK to broadcast across the country, with the station broadcasting traditional Norwegian music and offering a channel in the Sami language. Other notable radio stations in Norway include 901 Rox (Oslo), Radio Nord Norge (Northern Norway) and P4 Norge the largest private radio station in Norway. On average, it is estimated that 85% of Norwegians will tune into a radio station at least once a week.⁵⁴

Finally, television is the second highest used medium in Norway behind the internet. Some of the larger TV channels in Norway are broadcasted by the state-run media group NRK which operates the channels NRK1, NRK2 and NRK3. TV 2 is also a popular Norwegian TV channel and is operated by the TV 2 group. Norwegians commonly have access to many TV channels from outside of Norway, with channels from Sweden, the UK and the US being available. The high usage of English in the country further makes these channels appealing to Norwegian consumers allowing them to view content produced from far afield.

6.1.3 Fairs and exhibitions

In addition to the digital approach or traditional media, companies may decide to promote their products on various trade fairs. Trade fairs are numerous, cover a broad range of sectors and are generally becoming a more attractive and sophisticated method for in-country product promotion and industry networking.

While the majority of trade fairs take place in the bigger cities of Oslo, Bergen or Stavanger, there are also some fairs in other cities/areas such as Trondheim, Drammen or Frederikstad. Overall, however, it is very likely that most major food and beverage fairs and exhibitions will take place in Oslo or to a lesser degree in Bergen, Stavanger or Trondheim.

A list of selected major upcoming food-related events and fairs can be found in section 8.4. Further, more comprehensive lists including more specialist fairs can also be found online at websites such as:

- [Food & Beverages Trade Shows in Norway - Expos, Trade Fairs & Exhibitions \(10times.com\)](https://www.10times.com/food-beverages-trade-shows-norway-expos-trade-fairs-exhibitions)
- [Trade Fairs Norway \(tradefairdates.com\)](https://www.tradefairdates.com/norway/)

⁵⁴ Radio Audio measurement report Norway, Nielsen, available at <https://www.nielsen.com/insights/2022/2021-radio-audio-measurement-report-norway/#:~:text=From%20an%20engagement%20perspective%2C%20radio,in%20on%20a%20daily%20basis.>

6.2 Advertising regulations

The primary law relating to advertising in Norway is the Marketing Control Act which lays down the framework for businesses marketing to consumers. The purpose of the Act is to prevent unscrupulous marketing tactics.

- The Act covers most forms of marketing, although there are special provisions for the marketing of products via television which is under the Broadcasting Act.
- The Act prohibits aggressive marketing tactics and unsolicited advertising practices.
- A special chapter of the Act concerns advertising to children which is discussed in more detail below.

The full text of the act can be found, in English, at the following link:

<https://www.forbrukertilsynet.no/english/the-marketing-control-act>

The broadcasting act on the other hand can be found, in Norwegian, at the following link:

https://lovdata.no/dokument/NL/lov/1992-12-04-127#KAPITTEL_3 (note: page can be translated through Google).

The principal regulator is the Consumer Authority (*Forbrukertilsynet*) which oversees that advertising practises conducted by companies in Norway are in line with the requirements set out in the Marketing Control Act or the Broadcasting Act.

Provisions of particular relevance for food and beverage-specific advertising are:

- Advertising of **alcoholic beverages** in Norway is **banned** and there are a number of restrictions for obtaining alcoholic beverages in the country. The ban extends to all media and commercial outlets that target Norwegian consumers. The only slight exception to this rule is in the case of an editorial piece reviewing an alcoholic beverage although even this is strictly monitored.
- **Broadcast advertising in connection with children's programs** or specifically aimed at children through broadcast media is not permitted according to article 3.1 of the Broadcasting Act. However, the advertising of food and beverages through other media to children under 13 is self-regulated by the industry. While it should be noted that there have previously been discussions on introducing provisions specifically to limit the advertising of unhealthy food and beverages to children, ultimately the self-regulation path was chosen.

7 Norwegian Etiquette

7.1 Quick facts

There are many traits which are particularly important for Norwegians. These include personal privacy, punctuality and finally respecting that most Norwegians believe in equalitarianism and will not respond well to being talked down to.

Norway is a large hub of domestic and foreign business activity and it is very common for Norwegian companies to partner with numerous international organisations as the domestic market in Norway is quite small and the leading industries of the country, energy and the maritime sector, lean heavily on international cooperation. This leads to Norwegians being well accustomed to conducting business with partners from abroad which generally reduces any initial barriers to cooperation.

English is widely used in Norway as Norwegians are taught the language at a young age and most English media broadcasting in the country is not dubbed. Norwegians may also be knowledgeable in Swedish, Danish or German, however English is the commonest spoken foreign language. Norwegians will appreciate some efforts to use Norwegian words, although the need to use Norwegian as a visitor to the country is not generally expected.

Remember to bring a business card and shake hands on first contact as this is the business norm in Norway. Expect that everyone present may have an opinion or insight as this is reflective of the equalitarian social culture of the country; it is likely that a number of individuals not just from the main decision-makers may be present and offer insights during a meeting.

7.2 Key DOs and DON'Ts

Dos	DON'Ts
• Make sure to change currency at the port of entry or at a kiosk as Norway does not accept the Euro currency. • Avoid speaking too loudly as this is not common in Norway. • Avoid asking too many personal or private questions as Norwegians appreciate personal privacy. • Attempt to speak some Norwegian, even if it is just the greeting 'hei' as this will be appreciated and is a common greeting in Norway. • Business card exchange is common and, in some cases, expected in Norway so be prepared.	• Never discuss Norwegian political issues as this will not be well received; generally, even Norwegians between them refrain from this discussion. • Do not talk down to anyone or dismiss their insights as Norwegians value the idea that everyone is equal and will not respond well to the idea of being talked down to. • Do not automatically assume everyone speaks English. While some 85% of the population speak English, it is still best to ask someone first if they do. • Do not fail to respect that the state plays a large role in Norwegian society

• Appreciate that the country is large and travelling in between two cities can often times require a flight instead of other means of transport. • Anticipate that consumer prices in the country will almost certainly be more expensive than in the EU, and the budget for travel and subsistence in the country can be significant. • If conducting business activity in the centre or north of the country, make appropriate preparations for the colder climate and appreciate that for half the year in many regions the sun does not fully set. Even in southern cities such as Oslo, it can be very cold in the winter period.	and that Norwegians will not appreciate the state being talked about in a negative light. • Avoid comparing Norway to Sweden or Denmark too much as its citizens are very proud of their country's independence and uniqueness with regard to language and topography. • Do not stand too close to Norwegians, they appreciate personal space and standing too close (when able to move elsewhere) will be seen as intrusive.
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8 Directory of Trade Support Projects, Organisations, and Service Providers

There are a variety of services available, both within the EU and in Norway, for producers wishing to export to Norway. These service providers include EU-funded projects, services provided by the Member States and their embassies, other organisations and service providers, as well as buyers, importers, and distributors.

- Section 8.1 contains the project profiles for EU-funded initiatives operating in Norway.
- Section 8.2 contains the contact information for Member State embassies within Norway.
- Section 8.3 contains a listing of service providers including some information on the services available.
- Section 8.4 provides a calendar of exhibitions, trade shows, and other events to be held in Norway in 2021-22.
- Section 8.5 contains a database of professional contacts (buyers, importers, and distributors).

8.1 European Union organisations

Certain EU-funded, or co-funded, projects within Norway offer a range of business-enabling services and information providing important insights into the Norwegian market. Depending on your company profile these services can be free or fee-based; and are available for companies from any EU Member State.



Nordic Business Council

The Nordic Business Council works on the sustainable development of both Norway and the EU. The Council works with partners to help them establish sustainable development practises in their production process and offers them guidance on how best to eliminate non sustainable processes.

Contacts

 Ovre Skogvei, 1C Oslo.

 (+47) 46 26 77 07

 <https://www.nordicbusiness.org/>

**EUROCHAMBRES**

Eurochambres is one of the largest business representative organisations in Europe and incorporates chambers of commerce from both the EU and Norway. As the federation of Norwegian commercial and social enterprises is a correspondent member of EUROCHAMBRES the ability to facilitate internal business discussion and negotiation exists from members of this organisation seeking to enter the Norwegian market.

Contacts

📍 Avenue Des Arts 19/A-D Brussels

☎ (+32) 02 282 08 50

💻 <https://www.eurochambres.eu/>

**Delegation of the European Union to Norway**

The EU Delegation in Norway represents the common interests of the European Union in Norway and works on enhancing and developing trade relations between the two markets. Except for consular tasks, the Delegation in Oslo functions like an embassy. It is a diplomatic mission to represent the European Union in Norway.

Contacts

📍 Klingenberggaten 7 A

☎ (+47) 22 83 35 83

✉ delegation-norway@eeas.europa.eu

💻 https://www.eeas.europa.eu/delegations/norway_nb

8.2 Directory of EU Member State Embassies/Consulates

EU MS	Address	Contact information
Austria (Embassy)	Thomas Heftyes Gate 19-21 Oslo	☎ (+47) 22 54 02 00 ✉ oslo-ob@bmeia.gv.at 🌐 http://www.bmeia.gv.at/oeb-oslo/
Belgium (Embassy)	Munkedamsveien 53B Oslo	☎ (+47) 21 133 220 ✉ Oslo@diplobel.be 🌐 https://norway.diplomatie.belgium.be/en
Bulgaria (Embassy)	Tidemands Gate 11 Oslo	☎ (+47) 22 55 40 40 ✉ embassy@mfa.bg 🌐 https://www.mfa.bg/
Croatia (Embassy)	Drammensveien 21, Oslo	☎ (+47) 23 01 40 50 ✉ croemb.oslo@mvep.hr 🌐 https://mvep.gov.hr/
Czech Republic (Embassy)	Fritnerzs Gate 14 Oslo	☎ (+47) 2212 10 30 ✉ oslo@embassy.mzv.cz 🌐 https://www.mzv.cz/
Denmark (Embassy)	Olav Kyrres Gate 7 Oslo	☎ (+47) 22 54 08 00 ✉ oslamb@um.dk 🌐 https://norge.um.dk/
Estonia (Embassy)	Arbins Gate 2 Oslo	☎ (+47) 22 54 00 70 ✉ Embassy.Oslo@mfa.ee 🌐 https://oslo.mfa.ee/
Finland (Embassy)	Thomas Heftyes Gate 1 Oslo	☎ (+47) 221 249 00 ✉ sanomat.osl@formin.fi 🌐 https://um.fi/
France (Embassy)	Drammensveien 69 Oslo	☎ (+47) 23 28 46 00 ✉ Contact through website 🌐 https://no.ambafrance.org/
Germany (Embassy)	Oscars gate 45 Oslo	☎ (+47) 22 44 76 72 ✉ post@Deutschebotschaft.no 🌐 https://oslo.diplo.de/
Greece (Embassy)	Nobels Gate 45 Oslo	☎ (+47) 22 44 27 28 ✉ gremb.osl@mfa.gr 🌐 https://www.mfa.gr
Hungary (Embassy)	Sophus lies gate 3 Oslo	✉ mission.osl@mfa.gov.hu 🌐 https://oslo.mfa.gov.hu/
Ireland (Embassy)	Haakons Vlls Gate 1 Oslo	☎ (+47) 2201 7200 ✉ Contact through website 🌐 https://www.dfa.ie/
Italy (Embassy)	Inkognitogaten 7 Oslo	☎ (+47) 20 08 49 00 ✉ Ambasciata.oslo@esteri.it 🌐 https://amboslo.esteri.it/

EU MS	Address	Contact information
Latvia (Embassy)	Bygdoy alle 76 Oslo	☎ (+47) 22 542 380 ✉ embassy.norway@mfa.gov.lv 🌐 https://www2.mfa.gov.lv/
Lithuania (Embassy)	Dronningens Gate 3 Oslo	☎ (+47) 221 292 00 ✉ amb.no@urm.lt 🌐 https://no.mfa.lt/
Luxembourg (Consulate)	Olav Selvaags plass 4 Oslo	☎ (+47) 24 12 44 00 ✉ ole.jacob.sunde@formue.no
Malta (Consulate)	Nordheimbakken 5 Oslo	☎ (+47) 67 58 41 88 ✉ maltaconsul.oslo@gov.mt
The Netherlands (Embassy)	Oscars Gate 29 Oslo	☎ (+47) 23 33 36 00 ✉ Contact through website 🌐 https://www.netherlandsworldwide.nl
Poland (Embassy)	Olav Kyerres plass 1	☎ (+47) 24 11 08 50 ✉ oslo.info@msz.gov.pl 🌐 https://www.gov.pl
Portugal (Embassy)	Josefines gate 37 Oslo	☎ (+47) 23 33 28 57 🌐 https://oslo.embaixadaportugal.mne.gov.pt/pt/a-embaixada/contactar
Romania (Embassy)	Oscars Gate 51 Oslo	☎ (+47) 22 44 15 12 ✉ oslo@mae.ro 🌐 https://oslo.mae.ro/
Slovenia (Consulate)	Lille Grensen 7 Oslo	☎ (+47) 99 23 22 00
Slovakia (Embassy)	Thomas Heftyes Gate 24 Oslo	☎ (+47) 22 04 94 60 ✉ emb.oslo@mzv.sk 🌐 https://www.mzv.sk/
Spain (Embassy)	Halvdan Svartes 13 Oslo	☎ (+47) 22 92 66 90 ✉ emb.oslo@maec.es 🌐 https://www.exteriores.gob.es/
Sweden (Embassy)	Inkognitogata 27 Oslo	☎ (+47) 24 11 42 00 ✉ ambassaden.oslo@gov.se 🌐 https://www.swedenabroad.se/oslo

8.3 Other organisations and service providers

8.3.1 Trade promotion organisations (TPOs) and agri food promotion organisations (APOs)

In-country offices

EU MS	Address	Contact information
Belgium (Flanders) FIT (TPO)	Embassy of Belgium, Munkedamsveien 53B N-0250 Oslo	☎ +47 22 12 83 00 ✉ oslo@flanderstrade.com
Belgium (Wallonia) AWEX / Wallonia-Brussels, (TPO)	Embassy of Belgium, Munkedamsveien 53 B, N-0250 Oslo	☎ +47 22 12 84 00 ✉ oslo@awex-wallonia.com
France Business France in Norway (TPO)	Oscarsgate 27, 0352 Oslo	☎ +45 33 37 61 72 +47 22 42 57 00 ✉ joelle.laik@businessfrance.fr
Greece Enterprise Greece / Office of Economic and Commercial Affairs (TPO)	Embassy of Greece in Oslo, Nobels Gate 45, 0268 Oslo	☎ +47 22442728 ✉ gremb.osl@mfa.gr
Ireland BoardBia (APO)	Represented in Norway from their office in Stockholm - Embassy of Ireland	☎ + 46 8 545 04058
Italy Italian Trade Agency (TPO)	Korta Gatan 7 (8th floor) Solna 171 54 - Stockholm - Sweden	☎ +46 8248960 ✉ stoccolma@ice.it 🌐 https://www.ice.it/en/markets/sweden
Spain ICEX (TPO)	Spansk Ambassade Handelsavdeling Karl Johans gate 18C 0159 Oslo	☎ +47 23 31 06 80 ✉ oslo@comercio.mineco.es

Central offices inside EU Member States

EU MS	Address / location	Contact information
Austria Agrarmarkt Austria Marketing (APO)	Austria	 https://www.ama.at/Home
Belgium (Flanders) FIT (TPO)	Belgium	 michele.surinx@fitagency.be  www.flandersinvestmentandtrade.com
Belgium (Flanders) Flanders' Agricultural Marketing Board (APO)	Koning Albert II-laan 35 box 50 - 1030 Brussels Belgium	 +32 491861700  gert.vancausenbroeck@vlam.be export@vlam.be  https://www.vlaanderen.be/vlam/
Belgium (Wallonia) AWEX / Wallonia-Brussels, (TPO)	Place Saintelette 2, Brussels, Belgium	 agrifood@awex.be  http://wallonia.be/fr/investir
Belgium (Brussels) (TPO)	Belgium	 https://hub.brussels/en/
Bulgaria Bulgarian Small and Medium Enterprises Promotion Agency (TPO)	Bulgaria	 https://www.sme.government.bg/en/
Cyprus Trade Service of the Ministry of Energy, Commerce and Industry (TPO)	6, Andreas Araouzos Street, 1421, Nicosia, Cyprus	 00357 22867268  ts@meci.gov.cy  http://www.mcit.gov.cy/mcit/mcit.nsf/index_en/index_en
France Business France	77 Boulevard Saint-Jacques, 75014 Paris, France	 agroalimentaire@businessfrance.fr  https://www.businessfrance.fr/
France SOPEXA (APO)	France	 (+33) 01 55 37 50 00  mybusiness@sopexa.com
Estonia Enterprise Estonia (TPO)	Estonia	 (+372)6279421  info@eas.ee  https://www.eas.ee/?lang=en
Germany Federation of German Food and Drink (APO)	Germany	 (+49) 30 200786-157  bve@bve-online.de  https://www.bve-online.de/english
Greece Enterprise Greece / Office of Economic and Commercial Affairs (TPO)	109 Vasilisis Sophias Avenue, 115 21 Athens, Greece	 +30 210 335 5779  v.kyrkou@eg.gov.gr a.gravanis@eg.gov.gr  https://www.enterprisegreece.gov.gr/en/
Hungary Hungarian Export Promotion Agency (TPO)	Hungary	 (+36) 1 922 2600  info@hepa.hu  https://hepa.hu/en
Ireland Enterprise Ireland (TPO)	Ireland	 https://www.enterprise-ireland.com/en/
Ireland BoardBia (APO)	Ireland	 https://www.bordbia.ie/
Italy Italian Trade Agency (TPO)	Via Liszt 21, Rome, Italy	 segreteria.marketing@ice.it  https://www.ice.it/en/

EU MS	Address / location	Contact information
Lithuania Enterprise Lithuania (TPO)	Lithuania	 https://www.versilietuva.lt/en/
Malta Trade Malta (TPO)	Malta	 https://www.trademalta.org/
Netherlands Netherlands Enterprise Agency (TPO)	Netherlands	 https://english.rvo.nl/
Portugal Portuguese Trade & Investment Agency – AICEP (TPO)	Portugal	 https://www.portugalglobal.pt/EN/Pages/Index.aspx
Slovenia Spirit Slovenia (TPO)	Slovenia	✉ sonja.demsar@spiritslovenia.si ; info@spiritslovenia.si  https://www.sloveniabusines.eu/
Spain FIAB (APO)	Spain	 +34 91 411 72 11 ✉ internacionalizacion@fiab.es
Spain ICEX	Paseo de la Castellana, 278 - 28046 Madrid, Spain	✉ maria.naranjo@icex.es  https://www.icex.es/icex/es/index.html

8.3.2 Other service providers

Service provider	Address	Contact information
SERVICES FOR AUSTRIAN COMPANIES		
Advantage Austria Toronto	Thomas Heftyes gate 19-21 0264 Oslo Norway	+47 24 11 78 00 ✉ oslo@advantageaustria.org 🌐 https://www.advantageaustria.org/no
SERVICES FOR BELGIAN COMPANIES		
Federation of Belgian Chambers of Commerce	Rue Belliard 2 1040 Brussels	✉ info@belgianchambers.be 🌐 https://belgianchambers.be/
SERVICES FOR BULGARIAN COMPANIES		
Norway Bulgaria Business Group	7, Indzhe Voivoda Str. 1309 Sofia, Bulgaria	✉ contact@nbbg.eu 🌐 http://nbbg.eu/
SERVICES FOR CROATIAN COMPANIES		
Nordic Chamber of Commerce in Croatia	Radnička cesta 52, HR - 10000 Zagreb	✉ office@nordicchamber.hr 🌐 http://www.nordicchamber.hr/
SERVICES FOR CZECH COMPANIES		
Czech Chamber of Commerce	300 Florentinum Prague	+420 266 721 ✉ office@komora.cz 🌐 https://www.komora.cz/en/
SERVICES FOR CYPRIOT COMPANIES		
Cyprus Chamber of Commerce and Industry	38, Grivas Dhigenis Ave. & 3, Deligiorgis Str., P.O.Box 21455, 1509 Nicosia	+357 22889800 ✉ chamber@ccci.org.cy
SERVICES FOR DANISH COMPANIES		
Norwegian Danish Chamber of Commerce and Culture	Dampfaegevej 10 4 th floor DK-2100 Copenhagen	+ 45 4075 2084 ✉ info@ndcc.dk 🌐 http://ndcc.dk/
SERVICES FOR DUTCH COMPANIES		
Norwegian Dutch Chamber of Commerce	Noordendijk 2 3311 RP Dordrecht The Netherlands	+ 31 6 5336 0937 ✉ office@nordcc.nl 🌐 https://www.nordcc.nl/
SERVICES FOR ESTONIAN COMPANIES		
Norwegian Estonian Chamber of Commerce	Harju 6 15054 Tallinn	+ 372 5332 3296 ✉ info@necc.ee 🌐 https://necc.ee/contact-us/
SERVICES FOR FRENCH COMPANIES		
CC France-Norway	Oscarsgate 27 0352 Oslo	🌐 https://www.ccfno.no/
SERVICES FOR GERMAN COMPANIES		
German Norwegian Chamber of Commerce	Drammensveien 111B, 0260 Oslo	+ 47 22 12 82 10 ✉ info@handelskammer.no 🌐 www.handelskammer.no/
SERVICES FOR GREEK COMPANIES		
Union of Hellenic chamber of commerce	6 Akadimias, Athens	+210 3387 104 ✉ keeuuhcci@uhc.gr 🌐 https://www.uhc.gr/
SERVICES FOR HUNGARIAN COMPANIES		

Service provider	Address	Contact information
Hungarian Norwegian Chamber of commerce	c/o König Consulting Nyveien 55 3470 Slemmestad	+47 918 63 722 info@hncc.no https://hncc.no/
SERVICES FOR IRISH COMPANIES		
Enterprise Ireland	East point business park, Dublin 3	+353 1 727 2000 Contact through website https://www.enterprise-ireland.com/
SERVICES FOR ITALIAN COMPANIES		
Italian Norwegian Chamber of Commerce	Thune Næringspark, Drammensvn. 130, B3, 0277 Oslo	+47 907 51 145 am@nihk.no https://www.nihk.it/
SERVICES FOR LATVIAN COMPANIES		
Latvian Chamber of commerce and industry	35 Krisjana Valdemara str., Riga, LV-1010, Latvia	+371 67225592 info@chamber.lv
SERVICES FOR LITHUANIAN COMPANIES		
Lithuanian Chamber of commerce and industry	Vašingtono sq. 1-63a, LT-01108 Vilnius	+370 2613 102 info@chambers.lt https://chambers.lt/en/
SERVICES FOR LUXEMBURG COMPANIES		
Federation of Belgian / Luxembourgish Chambers of Commerce	Rue Belliard 2 1040 Brussels	info@belgianchambers.be https://belgianchambers.be/
SERVICES FOR MALTESE COMPANIES		
The Malta Chamber of Commerce, Enterprise and Industry	64, Republic Street, Valletta, Malta	+ 356 2203 2000 https://www.maltachamber.org.mt/
SERVICES FOR POLISH COMPANIES		
Norwegian Polish Chamber of Commerce	Oslo	+47 908 52 909 Contact via website https://npcc.no/
SERVICES FOR PORTUGUESE COMPANIES		
Camara de comercio (Portuguese Chamber of commerce)	Rua Das portas de Santo Antao,89	+ 351 213 224 050 geral@ccip.pt https://www.ccip.pt/en/
SERVICES FOR ROMANIAN COMPANIES		
Chamber of Commerce and Industry of Romania	Address: 2, Octavian Goga Blvd, sector 3, 030982 Bucharest	+40 21 3117534 narcis.pirnaeu@ccir.ro www.ccir.ro
SERVICES FOR SLOVAK COMPANIES		
Slovak Chamber of Commerce & Industry	Gorkého 9, 81603 Bratislava, Slovakia	+421 2 54433272
SERVICES FOR SLOVENIAN COMPANIES		
Chamber of Commerce and Industry of Slovenia	Dimičeva 13, SI-1504 Ljubljana	+386 1 5898 000 info@gzs.si
SERVICES FOR SPANISH COMPANIES		
Spanish Norwegian Chamber of Commerce	Roald Amundsens gate 6, 0161 Oslo	post@snhk.com http://www.snhk.no/
SERVICES FOR SWEDISH COMPANIES		

Service provider	Address	Contact information
Norwegian Swedish Chamber of Commerce	C/o Langseth Services AS Ryensvingen 3 0680 Oslo	 +47 92 89 74 25  john@nshk.no  https://norsksvenskahandelskammaren.com/

8.4 Calendar of trade events and exhibitions 2022

There are not many reoccurring food and beverage trade shows in Norway. A list of those occurring in Norway is below. It should be noted that there are a few regional trade fairs (i.e. for wider Scandinavia) taking place in other countries such as Sweden and Finland which may also be of interest or relevance; and therefore it may be worth keeping an eye on fairs in the wider region. However, it is important to remember that these regional fairs are not dedicated to the Norwegian market.

Event	Date	Recurrence	Venue	Organiser Details
February 2023				
UMAMI Lillestrom	14 th – 17 th	Every three years	Norges Varemesse Messeveien 1 200 Lillestrom	☎ + 47 (0)66 939100 ✉ Contract through website 🌐 www.norgesvaremesse.no
SMAK	14 th – 17 th	Every three years	Norway Trade Fairs (Norges Varemesse), Oslo	☎ +47 922 07 310 ✉ ten@novaspektrum.no 🌐 http://smakmessen.no/
August 2023				
Mersmak in Skien	TBC	Annual	Skien, Norway	✉ utstiller@mersmakiskien.no 🌐 https://www.mersmakiskien.no/
September 2023				
Matstreif	TBC	Annual	Youngstorget, Oslo, Norway	☎ (+47) 22 00 25 00 ✉ nadja.yvonne.hartikkala@innovasjon norge.no 🌐 https://www.innovasjon norge.no/matstreif/

8.5 Database of professionals' contacts

8.5.1 List of relevant buyers, importers, and distributors

Note: a list of all companies which are authorised to import alcoholic beverage with an alcohol content above 4.75% can be found on the Vinmonopolet website at the following link:

<https://vmp.sharepoint.com/:x:/s/Vinmonopoletslanseringslister/EfkUAELI6nVEn53N2ACdcPMBKN4cYRZSSykMh6CwSDPA-w?rttime=Oy7rg94T20g>

Some, but not all of these are included in the table below (mainly larger companies are listed below).

Company name	Type	Area of interest	Contact information
7-11	Convenience Store chain	F&B	✉ Contact through website 🌐 https://7-eleven.no/
A food market	Import/Distribution	F&B	☎ +47 22 68 64 00 🌐 https://asianfood.cdh.no
Adriatic	Import/Distribution	F&B	☎ +47 400 92 244 ✉ post@adriatic.no 🌐 https://www.adriaticcafe.no/
Amundsen Brewery	Import/Distribution	Beer	✉ Contact through website 🌐 https://www.amundsenbrewery.com/
Aska Import	Import/Distribution	F&B	✉ Contact through website 🌐 https://asko.no/
Bacalao	Import and retail	Portuguese food and beverages	☎ +47 924 647 77 ✉ post@bacalaotilfolket.no 🌐 https://bacalaotilfolket.no/
Bakklandet Delikatesse	Import/Distribution	Olive oil	🌐 https://bakklandetdelikatesse.no/
Bap Imports	Import/Distribution	Wine	☎ +47 950 31 939 ✉ post@bapimport.no 🌐 https://www.bapimport.no/
Barcho	Import/Distribution	Olive oil (mainly premium)	☎ +47 901 83 352 ✉ Through website 🌐 https://barcho.com/
Barramon	Import/Distribution	Spanish food and beverages	☎ +47 900 55 069 ✉ barroman@hotmail.no 🌐 https://www.barramon.no/
Beer enthusiast Norway	Import/Distribution	Beer	☎ + 47 21 11 49 10 ✉ jhs@beerenthusiast.no 🌐 https://beerenthusiast.no/
Better Wines AS	Distribution	Wine	☎ +47 90 82 30 95 ✉ ost@betterwines.no 🌐 https://betterwines.no/

Company name	Type	Area of interest	Contact information
Beverage Partners	Import/Distribution	Wine & Spirits	☎ +47 21 93 50 00 ✉ Contact through website 🌐 https://beveragepartner.no/
Bistro Budapest	Import/Distribution	Hungarian food and beverages	☎ +47 400 80 336 ✉ post@bistrobudapest.no 🌐 https://www.bistrobudapest.no/
Blanche	Import/Distribution	French Food and beverages	☎ +47 23 20 13 10 ✉ bestilling@blanche.no 🌐 http://www.blanche.no
Bon Bon Oslo	Import/Distribution	Belgian food and beverages	✉ info@bonbonoslo.com 🌐 https://www.bonbonoslo.com/
Bon Lio	Import/Distribution	Iberian food and beverages	☎ +47 46 777 212 ✉ post@bonlio.no 🌐 https://www.bonlio.no/
Botolfsen	Import/Distribution	Fresh F+V	☎ +47 22 07 69 50 ✉ Through website 🌐 http://bbimp.no/en/
Brasserie France	Import/Distribution	French Food and beverages	☎ +47 2310 0165 ✉ bord@brasseriefrance.no 🌐 https://brasseriefrance.no/
Brewery International	Import/Distribution	Beer	☎ +47 23 37 37 10 ✉ brewery@brewery.no 🌐 https://brewery.no/
Bunnpris	Import/Distribution	Olive oil	☎ +73 93 51 10 ✉ bptyholt@bunnpris.no 🌐 https://www.bunnpris.no/
Café Dublin	Import/Distribution	Irish food and beverages	☎ +47 73 50 00 01 ✉ post@cafedublin.no 🌐 http://cafedublin.no/
CASK AS	Import/Distribution	Beer	☎ +47 233 48 080 ✉ mail@casknorway.no 🌐 https://casknorway.no/
Champagne West	Import/Distribution	F&B	☎ +47 463 438 21 ✉ patrik.widegren@champagneinwest.com 🌐 http://champagneinwest.com/
Chez Colin	Import/Distribution	French Food and beverages	☎ +47 23 20 23 23 ✉ bestilling@chezcolin.no 🌐 http://www.chezcolin.no/
Chilli Chocolate AS	Import/Distribution	Chocolate	✉ Contact through website 🌐 https://www.chilichocolate.no/
COOP Norge	Major Retailer	F&B	☎ +47 64 87 50 00 ✉ Contact through website

Company name	Type	Area of interest	Contact information
			 https://kundeservice.coop.no/
Crianza	Import/Distribution	Wine	 +47 926 44 792  info@crianza.no  http://www.crianza.no/
Den Lille Sjokolade fabrikken	Import/Distribution	Chocolate	 +47 67 15 32 74  info@lillesjokoladefabrikken.no  https://lillesjokoladefabrikken.no/
Dropsen	Import/Distribution	Chocolate	 +47 00 75 77  https://ostbanehallen.no/
Eko Market	Import/Distribution	Polish food and beverages	 +47 940 99 094  hei@ekomarket.no  https://www.ekomarket.no/
Elea Hellas	Import/Distribution	Greek food and beverages	 Contact through website  https://www.eleahellas.no/
Elgeseter	Import/Distribution	Food and beverages	 +47 48 003 940  elgeseter.extra@coop.no
Fenaknoken	Import/Distribution	Meat	 +47 22 42 34 57  https://www.fenaknoken.no/
Fine Distribution AS	Import/Distribution	F&B	 +47 22 70 71 92  hjelp@finedistribution.no  https://www.finedistribution.no/
Flaaten	Import/Distribution	Wine	 +47 23 20 32 00  Through website  https://flaatenvin.no/
Food Broker AS	Import/Distribution	F&B	 +47 64 93 79 00  post@foodbroker.no  http://www.foodbroker.no/
Freia	Import/Distribution	Chocolate	 +47 08 505 402 00  https://www.freia.no/
Fromagerie	Import/Distribution	Cheese	 +47 226 019 95  kontakt@fromagerie.no  https://www.fromagerie.no/
FYI Bistromomy	Import/Distribution	Food and beverages	 booking@fyrbistronomi.no  https://www.fyrbistronomi.no/
Gamble Oslo	Distribution	Wine & Spirits	 Contact through website  https://osteperler.no/
Geia AS	Import/Distribution	F&B	 +45 96 34 04 14  info@geiafood.com  https://www.geiafood.com/
Godteslotte	Import/Distribution	Chocolate	 +47 (417) 81 130  post@godteslottet.no  https://www.godteslottet.no/

Company name	Type	Area of interest	Contact information
Gyros House	Import/Distribution	Greek food and beverages	☎ +47 53 51 96 46 ✉ gyroshousesentrum@gmail.com 🌐 https://www.gyroshousesentrum.no/
Holysteri	Import/Distribution	Cheese	☎ +47 413 06 746 ✉ ole@overjard.no 🌐 holysteri.no
House of wine	Import/Distribution	Wine	☎ +47 917 58 198 ✉ houseofwine@houseofwine.no 🌐 https://www.houseofwine.no/
Idsoe	Import/Distribution	Food and beverages	🌐 https://www.idsoe.no/
Ikea Norge	Supplier	Swedish F&B	🌐 https://www.ikea.com/
Intrabrandts	Import/Distribution	Wine & Spirits	☎ +47 22 54 53 00 ✉ post@interbrands.no 🌐 https://interbrandsnordic.com/
Joker	Import/Distribution	F&B	☎ +47 24 11 33 30 ✉ Contact through website 🌐 https://joker.no/
Kiwi	Import/Distribution	Food and beverages	☎ +47 322 440 00 🌐 https://kiwi.no/
Konfekt Gallerie	Import/Distribution	Chocolate	☎ +47 468 18 812 ✉ vivien@konfektgalleriet.no 🌐 https://konfektgalleriet.no/
L'ardoise	Import/Distribution	French food and beverages	☎ +47 2210 965 ✉ charles@lardoise.no 🌐 https://www.lardoise.no/
La Sangras	Import/Distribution	Spanish food and beverages	☎ +47 22 11 63 15 🌐 https://www.lasangria.no/
Le Bistro	Import/Distribution	French food and beverages	☎ +47 73 60 60 24 ✉ Contact through website 🌐 https://lebistrotrondheim.no/
Le mathis	Distribution	French food and beverages	☎ +47 55 61 20 01 ✉ booking@lemathis.no 🌐 https://lemathis.no/
Lindt Norge	Import/Distribution	Chocolate	✉ Contact through website 🌐 https://www.lindt.no/
Lofoten Gardsysteri	Import/Distribution	Cheese	☎ +47 950 82 958 ✉ lofoten-gardsysteri@online.no 🌐 https://www.lofoten-gardsysteri.no/
Macondo	Import/Distribution	Beer	✉ Contact through website 🌐 https://www.macondo.no/
Mathallen Oslo	Import / distribution	F&B	☎ +47 40 00 12 09 ✉ post@mathallen.no

Company name	Type	Area of interest	Contact information
			 https://mathallenoslo.no/
Meny	Distribution	F&B	 +47 22 56 35 00  Contact through website  https://meny.no/
Mission wine and spirits	Import/Distribution	Wine & Spirits	 +47 23 37 37 27  jostein@missionws.no  https://missionws.no/
Multi Bev	Import/Distribution	Beer	 +47 24 11 17 30  https://www.multibev.no/
Munkekroen	Import/Distribution	Danish food and beverages	 +47 613 60 177  mail@munkekroen.com  http://www.munkekroen.com/
Natur Import	Import/Distribution	F&B	 +47 23 37 37 40  bestilling@naturimport.no  https://naturimport.no/
Natural Selection	Import/Distribution	Wine & Spirits	 +47 936 32 195  trond@naturalselections.no  https://www.naturalselections.no/
Netfresh	Import/Distribution	Fresh produce	 +47 922 4097
Noridane	Import/Distribution	Meat	 + 47 414 99 00  info@noridane.com  https://www.noridane.com/
Norsk Vin	Import/Distribution	Wine & Spirits	 Contact through website  http://www.norskvin.com/
Norwegian beverage group	Import/Distribution	Wine & Spirits	 + 47 21 05 91 30  Through website  https://www.nbgroup.no/
Norwegian Wine Imports	Import/Distribution	Wine & Spirits	 +47 22 42 61 00  mail@norwegianwineimports.no
Olive tree	Import/Distribution	Italian food and beverages	 +47 463 59 344  https://www.olive-tree.no/
Olivelunden	Import/Distribution	Olive oil	 Contact through website  https://www.olivenlunden1830.no/
Oslo Wine Agency	Importer/Distributor	Wine	 +47 950 98 719  martin@oslowineagency.no  https://www.oslowineagency.no/
Pakmat	Import/Distribution	F&B	 +47 22 19 50 60  post@pakmat.no  https://pakmat.no/
Palmer Group	Import/Distribution	Wine & Spirits	 Contact through website  https://palmer.no/
Pascal Greek and Grill	Import/Distribution	Greek food and beverages	 +47 967 161 62  Contact through website

Company name	Type	Area of interest	Contact information
			 http://pascalgreekandgrill.no/
Poder	Import and retail	Wine	 post@poder.no  https://poder.no/
Pol Market	Import/Distribution	Polish food and beverages	 +47 461 12 315  info@polmarket.no  https://polmarket.no/
Polka Pierogi	Import/Distribution	F&B	 https://www.polkapierogi.no/
Rema	Major Retailer	F&B	 +47 52 90 1000  Contact through website  https://www.rema.no/
Rivoli	Import/Distribution	French food and beverages	 +47 21 42 05 90  booking@rivoli.no  https://www.rivoli.no/
Rotter	Import/Distribution	F&B	 frogner@roetter.no  https://www.roetter.no/
Sagro	Import/Distribution	F&B	 +47 23 16 32 20  mail@sagro.no  https://www.sagro.no/
Sampoorna Foods	Imports/Distribution	F&B	 +47 469 715 38  order@sampoornafoods.com  https://sampoornafoods.com/
Sebatien Bruno	Import/Distribution	French chocolate	 +47(495) 155-73-58  post@sebatienbruno.no
Sona Ammafato	Distribution	Olive oil (Italy)	 +47 06 214 34 839  Contact through website  https://sonoaffamato.nl/
Spar	Convenience Store chain	F&B	 +47 3120 626 6749  https://spar-international.com/
Spar Norge	Import and retail	F&B	 +47 241 131 00  Contact through website  https://spar.no/
Steen and Storm	Import/Distribution	F&B	 Contact through website  https://steenogstromoslo.no/
Strag	Import/Distribution	Beer	 +47 902 33 923  office@strag-gruppen.no  https://www.strag.no/
The cheese box Oslo	Import/Distribution	Cheese	 +47 939 22 596  https://thecheeseboxoslo.business.site/
The Dubliner Pub	Import/Distribution	Irish F&B	 +47 22 33 70 005  post@dubliner.no  https://www.dubliner.no/
The old Irish pub chain	Import/Distribution	Irish food and beverages	 https://oldirishpub.no/

Company name	Type	Area of interest	Contact information
Tonjum	Import/Distribution	F&B	 +47 55 20 80 50  office@tonjum.no  https://www.tonjum.no/
Treasury wine estates	Distribution	Wine	 +44 20 8843 84 00  Contact through website  https://www.tweglobal.com/
Tromso Tapas	Import/Distribution	Spanish food and beverages	 +47 77 68 27 27  post@tromsotapas.no  https://tromsotapas.no/
Tulip	Import/Distribution	Danish food and beverages	 +47 739 494 00  tulip.no@danishcrown.com  https://www.tulip.no/
Underdalsbui	Distribution	Cheese	 +47 94 05 06 96  post@underdalsbui.no  https://underdalsbui.no/
Vatan Import	Import/Distribution	F&B	 +47 22 64 33 45  https://www.vatan.no/
Via Italia	Import/Distribution	Italian food and beverages	 lisbet@viaitalia.no  http://www.viaitalia.no/
Villa Import	Import/Distribution	F&B	 +47 23 22 99 99  bestilling@villaimport.no  https://villaimport.no/
Vin Bjorvika	Import/Distribution	Wine, Spirits	 post@vin-bjorvika.no  https://www.vin-bjorvika.no/
Vinmonpolet	Only legal distributor of off-trade alcoholic beverages above 4.75%	Alcoholic Beverages	 +47 22 01 50 00  kundesenter@vinmonopolet.no  https://www.vinmonopolet.no/
Yummy Heaven Torggata	Import/Distribution	Chocolate	 +47 918 866 56  kundeservice@yummyheaven.no  https://www.yummyheaven.no/

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