



*Swedish Chambers*

TRADE PROMOTION PROGRAMME  
OF THE SWEDISH CHAMBERS



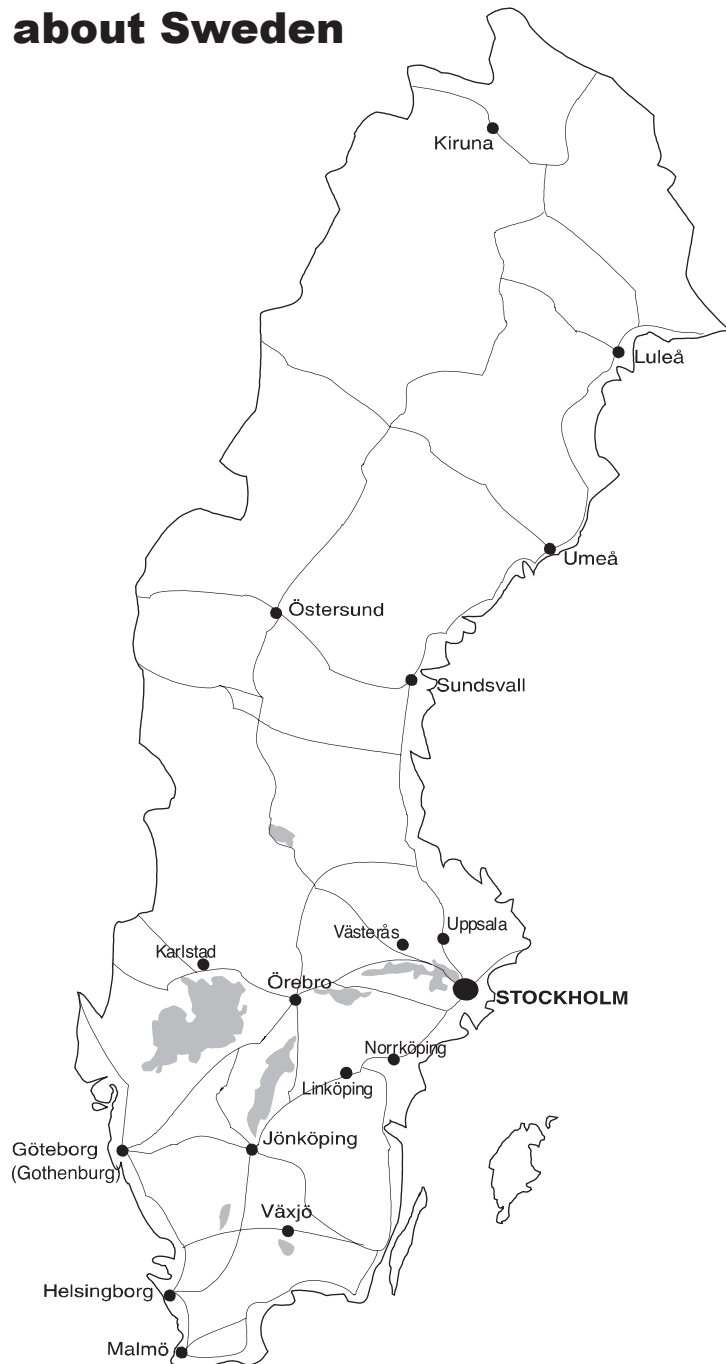
# Market Brief

Focus on the Swedish Market

## Sports Clothes and Goods

June 2008

# Facts about Sweden



**Area:** 449,964 sq.km  
**Population:** 9.1 million

**Capital:** Stockholm.  
Stockholm city: 780,800 inh.  
Greater Stockholm: 1.9 mil. inh.

**Business language:**  
Swedish, English

**Religion:**  
Lutheran

**Largest cities:**  
Stockholm city: 780,800 inh.  
Gothenburg 489,400 inh.  
Malmö 275,100 inh.  
Uppsala 185,200 inh.  
Linköping 138,400 inh.  
Västerås 132,800 inh.  
Örebro 128,700 inh.  
Norrköping 125,300 inh.  
Helsingborg 123,100 inh.  
Jönköping 121,300 inh.

**Form of government:**  
Constitutional monarchy,  
parliamentary democracy

**Some distances:**  
Stockholm-Malmö 640 km  
Stockholm-Gothenburg 490 km  
Stockholm-Sundsvall 400 km  
Stockholm-Kiruna 1310 km

**Currency:**  
1 krona (SEK) = 100 öre

## The European Union

- Austria
- Belgium
- Bulgaria
- Cyprus
- Czech Rep.
- Denmark
- Estonia
- Finland
- France
- Germany
- Great Britain
- Greece
- Hungary
- Ireland
- Italy
- Latvia
- Lithuania
- Luxemburg
- Malta
- Netherlands
- Poland
- Portugal
- Romania
- Slovak Rep.
- Slovenia
- Spain
- Sweden

**The EES/EEA area**  
EU-countries, Iceland,  
Liechtenstein and Norway

**EFTA**  
Iceland, Liechtenstein,  
Norway and Switzerland



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# 1 General Background and Definitions

This market brief deals with **sports clothes** including leather sports gloves and **sports goods** as defined by the European Union's Combined Nomenclature (CN) under Chapter 95, headings 06 and 07, with the exception of skis & ski-bindings and sailboards.

The market brief does not cover bicycles, riding equipment, camping equipment, canoes, boating equipment or sport shoes.

The term sports clothes refers to garments that are used in sports and exercise activities. Protective clothing, helmets and other special garments for dangerous sports activities are not included. It is often impossible to draw the line between sports clothes and casual clothes. In this market brief are included items that are used primarily for sports activities such as training, exercise and competition. Excluded are items like shorts, anoraks and other informal garments in wide use mainly as leisure garb.

The following sports clothes and goods are included and found under the CN headings given below. The CN is based on the Harmonised System (HS).

## Chapter 61

6112.11.00, 12.00 & 19.00  
6112.20.00  
6112.31.10- 49

## Articles of tricot, jersey and knitwear

Track suits  
Ski wear, ski suits  
Swim trunks and swim suits for men, boys, women and girls

## Chapter 62

6211.11.00-12.00  
6211.20.00

## Articles of woven fabric

Swim trunks and swim suits for men, boys, women and girls  
Ski wear, ski suits

## Chapter 42

4203.21.00

Sports gloves of leather

## Chapter 95

9506.29  
9506.31-39  
9506.40  
9506.51-61  
9506.62-69  
9506.70  
  
9506.91  
  
9506.99  
9507.10-90

Water sport equipment except sailboards (windsurfing boards)  
Golf clubs, balls and other golf equipment  
Articles and equipment for table tennis  
Tennis, badminton and similar rackets, tennis balls  
Balls, other than golf balls, table tennis balls and tennis balls  
Ice skates and roller skates, incl. skating boards with skates attached  
Articles and equipment for physical exercises, gymnastics or sports (incl. track & field, weightlifting and gymnasium equipment)  
Other sports goods and equipment for outdoor games  
Fishing rods, fishhooks and other line fishing products

For many sports products trade statistics are not meaningful. Products are often defined by the material they are made of, rather than the purpose they are used for.

In other cases products are lumped together into aggregates with little meaning. But for some of the big sports statistics give reasonably accurate trade figures.

As trade and production statistics use very many statistical numbers to distinguish between different materials, such as wool, cotton, synthetics etc. that garments are made of, the description of the markets for and trade with garments becomes very fragmented if all varieties are commented on separately. In this market brief a type of garment will be dealt with without giving specifics by type of fabric.

Some sports clothes items cannot be separated from other similar garments. An example are track suits of woven fabric which are presented together with other clothes.

## **2 Market Characteristics**

### **2.1 Sports Clothes**

The market for sports clothes cannot be exactly defined. There has been a trend for several years for Swedes to dress in sports clothes even when not engaged in any sports or training activity. Thus ski jackets are used as outerwear in cold weather also to and from work and track suits are worn by many people on weekends in the country. It is very common that Swedes dress in casual or sporty wear for work as well as leisure. Conversely many people engage in sports and training activities dressed in casual wear not especially designed for sports, such as T-shirts and casual shorts.

Competition regarding sports clothes is more fierce in Sweden than many other countries since there are several strong Swedish brands on the market. That sports clothes are functional (e.g. breathe and transport sweat away from the body) is taken for granted by today's consumers, who do not want to choose between function and style. The market is becoming increasingly fashion conscious.

The market for children sports wear is growing, as is the children garments segment in general. Parents are used to buying branded sports wear for themselves and do the same for their young.

### **2.2 Sports Goods**

Branded products dominate the Swedish market for sports goods. Consumers buy well-known brands for two reasons: firstly because they feel assured that they get value for their money and secondly because of the snob appeal of well known and expensive brands. For some types of sports equipment it is very difficult to enter the Swedish market with an unknown product, however good the quality is.

Many of the serious sports products will also require after sales service and guarantees against manufacturing faults. Golf clubs, tennis rackets and expensive fishing reels for example need to have after sales service in the country. This also makes it expensive to enter a new market, as a network of retailers with service facilities must be built up.

Among sports goods in this market brief there are, however, also quite simple products that can be sold through department stores and hypermarkets. But most of the sport goods are branded. Also quite young children who start out in a sport will quickly demand the same branded equipment as their team-mates or competitors use.

There exists a low price, low quality market for some sports goods. Badminton sets, fishing sets, flippers and snorkel sets and other such sets of seasonal sports goods are often sold at low price in petrol stations, in hypermarkets or by mail order. This is a small segment of the market and an entry through this sector will seldom lead to a steady growth of exports, as new bargains with the importers must be struck each season.

### **3 Market Size**

The population of Sweden is just above 9 million. Swedes in general are quite keen on sports, not least outdoor sports, and many Swedes do not hesitate to pay for quality equipment of well-known brands. In Europe, Sweden is among the countries where people spend most on sports goods.

As a high proportion of Swedes wear sports clothes also when not actively engaged in sports, the consumption of sports clothes is relatively high compared to the overall market for garments. Since the sports clothes market cannot be distinguished from the casual wear market, or even the market for working clothes, the size of the market cannot be calculated. In this market brief the size of the market for specific garments will be given only when the garment is originally designed for sports and training activities.

In 2007 the sports business increased its sales by 7.4%, compared to 7.5% in 2006. The turnover in 2007 was approximately SEK 17 billion. Roughly estimated, 50% was garments (including some types not treated in this market brief, e.g. casual wear), 25% sports shoes and 25% sports equipment. 2007 was an extremely successful year for the sports trade and expectations for 2008 are even higher.

Below are given the value of the apparent consumption figures, production plus imports less exports, for sports clothes and goods. For many product groups there is no domestic production. In some cases the apparent consumption cannot be calculated, since products are imported to Sweden, given a brand name and then re-exported at a much higher price.

#### **3.1 Clothes for Winter and Out-door Use: Ski Wear and Leather Sports Gloves**

The apparent consumption of ski suits was worth SEK 44 million in 2007, down from SEK 47 million in 2006 and SEK 56 million in 2005. Part of the explanation for the decline is the recent warm winters in Sweden which have made ski wear sales drop. Many stores are unsure whether the snow will come or not and hesitate to stock ski wear.

The apparent consumption of sports gloves of leather was worth SEK 9.5 million in 2007, SEK 17.2 million in 2006 and SEK 14.8 million in 2005.

#### **3.2 Clothes for Summer or Indoor Use: Track Suits and Swim Wear**

The apparent consumption of tracksuits of knitted fabrics was worth SEK 67 million in 2007, SEK 69 million in 2006 and SEK 72 million in 2005. The size of the market for track suits of woven fabrics cannot be calculated from available trade statistics as these items are lumped together with work clothes and various other garments.

The apparent value of the market for swim trunks, bathing suits and bikinis was SEK 81 million in 2007, up from SEK 78 million in 2006 and SEK 61 million in 2005.

### **3.3 Water Sports Equipment**

Water sports are not very big in Sweden. The climate is cold and the summers are short. But the apparent consumption of water sports equipment (other than sailboards or wind surfers) has grown over the past few years. In 2007 the apparent consumption was SEK 44 million, down a little from SEK 45 million in 2006 but up from SEK 36 million in 2005.

### **3.4 Golf Equipment**

Over the past two decades golf has enjoyed an increasing popularity in Sweden. New golf courses have been built and new golfers have entered the sport. In 2005, however, the interest peaked and during the last few years Swedish golf clubs have lost members.

The apparent consumption of golf articles was worth SEK 205 million in 2007, down from SEK 253 million in 2006 and SEK 244 million in 2005. Still, the golf equipment market is the biggest sports goods market in Sweden today.

The apparent consumption of golf clubs was worth SEK 123 million in 2007, down from SEK 148 million in 2006. In 2005 the apparent consumption was worth SEK 150 million.

The value of the golf ball market was SEK 57 million in 2007, SEK 70 million in 2006 and SEK 47 million in 2005.

The apparent consumption of other golf equipment was worth SEK 25 million in 2007, SEK 34 million in 2006 and SEK 46 million in 2005.

### **3.5 Table Tennis Equipment**

Table tennis equipment has had a stagnant market for many years, and sales of table tennis tables have actually decreased. Unfortunately trade statistics do not separate rackets, balls and other table tennis products. They are given as one lump sum. The apparent consumption cannot be calculated because the imports of unbranded products are given a brand name in Sweden and both exported and sold for domestic consumption at a much higher price. The value of Swedish exports of table tennis equipment was well over twice the value of imports in 2007.

An important change within table tennis equipment is that glueing of rackets will be prohibited 1 September 2008, which will demand new techniques from the manufacturers.

### **3.6 Tennis and Other Racket Sports Equipment**

The trend for tennis is positive in Sweden. It is the ladies that stand for the growth and products adapted for women are becoming increasingly common. The apparent consumption of tennis rackets was worth SEK 13 million in 2007, SEK 11.5 million in 2004 and SEK 12.4 million in 2003.

The market for rackets for other games has decreased somewhat over the last few years. The apparent consumption of these rackets, mainly squash and badminton rackets, was SEK 8.5 million in 2007 down from SEK 9 million in 2006 and SEK 11.3 million in 2005.



The market for tennis balls was in 2007 worth SEK 11.3 million, up from SEK 5.6 million in 2006. The apparent consumption in 2005 could not be calculated as exports were much bigger than imports (due to re-export; there was no domestic production). Other racket sports balls and shuttlecocks are not listed separately in trade statistics.

### **3.7 Balls, other than Golf, Tennis and Table Tennis Balls**

It is not possible to tell from the trade statistics for what sport or game the different balls have been designed. The apparent consumption of inflatable balls was worth SEK 45 million in 2007, down from SEK 48 million in 2006 but up from 44 million in 2005. Football is a big sport in Sweden. Leather balls as used in football are not separated from other inflatable balls in the statistics, but trade sources estimate that these balls account for about a third of the inflatable balls sold in Sweden. The value of the football market has increased as the more expensive glued balls were introduced.

The apparent consumption of other balls (not inflatable) was SEK 8.5 million in 2007, down from SEK 12 million in 2006. In 2005 the consumption was worth SEK 11 million.

### **3.8 Ice Skates and Roller Skates**

Skating enjoyed increasing popularity in the nineties, particularly roller-skating after the introduction of the four in-line roller blades. The apparent consumption of all types of skates peaked in 1997 when it was worth SEK 186 million, the second largest sports goods product in Sweden. But in the past several years the skate market has declined, probably mainly due to diminishing interest in roller skating. In 2006, the last year for which production statistics are available, the apparent consumption of skates (including both ice skates and roller skates plus parts) was worth SEK 6 million down from SEK 31.9 million in 2005 and SEK 88 million in 2003.

### **3.9 Equipment for Physical Exercise, Gymnastics and Athletics**

The apparent consumption of equipment for physical exercise, gymnastics and athletics was worth SEK 478 million in 2006, up from SEK 358 million in 2005 and SEK 318 million in 2004. Part of the apparent rapid growth of this market can probably be explained by the fact that 2001 was the first year this type of equipment had its own CN number. It is likely that trade in this product group was misrepresented when the new CN number was first introduced. This product group is an aggregate of very different products which makes it impossible to comment on any specific market trend for any particular item.

### **3.10 Other Articles and Equipment for Play or Outdoor Games, *not included elsewhere in this chapter (CN chapter 95)***

This product group is also an aggregate of products the purpose of which is unknown. Unfortunately it is impossible to analyse or comment on such an aggregate. It had an apparent consumption worth SEK 465 million in 2003, the last year for which production statistics are published.

### **3.11 Fishing Rods, Reels, Fish Hooks and Other Line Fishing Products**

Fishing is a popular pastime in Sweden. In 2006 this was the second biggest sports goods market in Sweden after golf if one does not count the aggregates of equipment for gymnastics and track and field and other non-specified articles. The apparent consumption was worth SEK 74 million in 2006. Production statistics for 2005 and 2004 are not available. In 2003 the apparent consumption was worth SEK 125 million.

The most important products are reels. The apparent consumption of reels was worth SEK 36 million in 2006, the last year for which production figures are available.

The apparent consumption of fishing rods has been negative or very small in the last years. The reason is that the big Swedish manufacturer of reels for casting and fly-fishing imports rods and sells them on the home and export markets at a much higher price. Thus apparent domestic consumption of rods is meaningless.

The apparent consumption of fishhooks was worth SEK 17 million in 2007, up from SEK 13 million in 2006 and SEK 15 million in 2005.

In 2007 the apparent consumption of other fishing gear was worth SEK 39 million, down from SEK 23 million in 2006 and SEK 4.2 million in 2005.

## **4 Domestic Production and Exports**

### **4.1 Sports Clothes**

The Swedish garment industry has gone through big structural changes. Today, production is almost always carried out in other countries, even when the garments are developed, designed and marketed from Sweden. There is no Swedish production of any of the items covered in this market brief.

Sweden exports much more garments than it produces. All the exports of the items in this market brief are re-exports. The majority of the exports go to the neighbouring countries Denmark, Finland and Norway. Several large Swedish multiple store companies also have stores in these countries that account for much of the exports. Of the re-exports a small part is accounted for by the exports of Swedish mail-order companies that operate in these neighbouring countries. The exports to the Baltic countries include cut but not sewn garments shipped out to be made into garments in these countries and then shipped back to Sweden.

In 2007 Sweden exported SEK 173 million worth of the garments covered by this market brief, up from SEK 151 million the previous year. The biggest export items were swimwear, track suits and skiwear.

### **4.2 Sports Goods**

Domestic production of sports goods in Sweden had a value of about SEK 930 million in 2003 (the last year for which complete production statistics are published). Domestic production was concentrated on a few items, of which fishing gear, i.e. reels, was the most important, valued at SEK 262 million in 2003.

There was also quite an amount of unspecified sports equipment produced in Sweden that are accounted for under the headings 9506.91 and 9506.99. These

products are used for track & field sports, gymnasiums and for any other outdoor games or plays, not specified and also include protective equipment for ice hockey etc. The value of this production was about SEK 666 million in 2003.

Most of the domestic sports goods production is exported. Exports actually exceed production which is explained by significant re-exports of imported goods by manufacturers and importers/wholesalers that also operate in the neighbouring countries Denmark, Norway and Finland.

Exports amounted to SEK 1157 million in 2007, SEK 1094 million in 2006 and SEK 1100 million in 2005. SEK 207 million of the exports was fishing gear in 2007. Most of the balance was unspecified equipment for physical exercises, gymnastics, athletics, outdoor games, etc. Exports went to the neighbouring countries (Finland, Norway and Denmark), USA, Great Britain, Germany and about 100 other countries.

## **5 Imports**

### **5.1 Sports Clothes**

Sweden's imports of the clothes in this market brief were worth SEK 375 million in 2007 and SEK 363 million in 2006.

When looking at the countries of origin of the garments imported to Sweden one has to bear in mind that the imports from EU countries have often originally been manufactured in the Far East or South Asia. Trade statistics do not show the country of origin for products imported from other EU countries. Also that imports from several countries have been produced under a CMT contract with Swedish companies. CMT means that the manufacturer perform Cutting, Making (sewing) and Trimming.

Sweden imports garments from a very large number of countries. The leading exporters to Sweden of most items in this market brief made of cotton or man-made fibres are China and Hong Kong, followed by Denmark, Germany and Bangladesh.

China dominates the imports of ski suits to Sweden with almost 95% of Sweden imports in 2007.

Swimsuits were imported from Hong Kong and China and also from Denmark, the Netherlands, Finland, Great Britain and France.

The majority of leather sports gloves were imported from China, Poland, Pakistan Hong Kong and Belgium.

### **5.2 Water Sports Equipment**

Imports of equipment for water sports, except sailboards, were worth SEK 77 million in 2007 up from SEK 72 million in 2006 and SEK 62 million in 2005. In 2007 Italy, China and USA were the three biggest exporters of such equipment followed by Hong Kong, Thailand and Germany. Several other countries exported smaller quantities. Trade statistics do not give figures for specific items, which makes it impossible to comment on the products exported from the different countries.

### **5.3 Golf Equipment**

Golf accounts for the biggest imports to Sweden of all sports. This is because golf has become a very big sport in Sweden and because there is no domestic production of golf equipment. (The interest, however, seems to have peaked a few years ago.) Sweden imported golf equipment for SEK 282 million in 2007, down from SEK 295 million in 2006.

Golf clubs were imported for SEK 162 million in 2007, down from SEK 167 million in 2006. The biggest exporters of golf clubs to Sweden were Great Britain with 56% of the Swedish imports by value, followed by the Netherlands, USA, China, Germany and Hong Kong.

Golf balls are also a big import item. Sweden imported golf balls worth SEK 80 million in 2007, down from SEK 82 million in 2006. More than one third of the golf balls by value were imported from USA. Great Britain, the Netherlands, Taiwan and Germany were the other big exporters of golf balls.

In 2007 Sweden imported parts for golf clubs and other golf articles at a value of SEK 41 million, down from SEK 47 million in 2006. These goods came mainly from USA and China with the balance coming from Taiwan, Hong Kong and Great Britain.

Golf equipment imported from USA or Great Britain need not have been manufactured in these countries but could originate somewhere in the Far East and be re-exported by the owners of the brands from their distribution centres.

### **5.4 Table Tennis Equipment**

Sweden imported table tennis equipment for SEK 22 million in 2007, up from for SEK 16 million in 2006. The main part of the imports is re-exported. China accounted for more than one third of Sweden's imports of table tennis equipment in 2007. Germany, Hong Kong and Lithuania accounted for most of the balance.

### **5.5 Tennis and Other Racket Sports Equipment**

In 2007 Sweden imported tennis rackets at a value of SEK 15 million, an increase from SEK 13 million in 2006. Sweden imported tennis rackets from Belgium, Germany, China and France.

Imports of tennis balls increased in 2007 to SEK 20 million from SEK 14 million in 2006. Tennis balls came from Thailand, Austria, Germany and USA.

The import value of other rackets was SEK 11.5 million in 2007 and SEK 10.4 million in 2006. The biggest exporters of these rackets in 2007 were China, Denmark, Germany and Belgium.

### **5.6 Balls, other than Golf, Tennis and Table Tennis Balls**

Imports of inflatable balls, including leather balls, were worth SEK 57 million in 2007, down from SEK 62 million in 2006. In 2007 Germany, China, Pakistan and Denmark were the biggest exporters of inflatable balls to Sweden. Pakistan mainly exported leather footballs.

Sweden imported SEK 26 million worth of other, not inflatable, balls in 2007, compared to SEK 30 million in 2006. Most of the exports came from Denmark, China, Hong Kong, Taiwan and the Czech Republic.

### **5.7 Ice Skates and Roller Skates**

In 2007 Sweden imported skates and parts worth SEK 148 million, up from SEK 145 million in 2006. The biggest exporters of skates and parts in 2007 were China, Thailand, Canada and Hong Kong.

### **5.8 Articles and Equipment for Physical Exercise, Gymnastics and Athletics**

This is a large product group with imports worth SEK 539 million in 2007, up from SEK 532 million in 2006 and SEK 517 million in 2005. In 2007 the imports came from almost 50 countries, mostly in Europe and the Far East. The three leading exporters to Sweden were China, USA and Taiwan. Other big exporters of these articles were Norway, Denmark, Finland and Italy. It is not possible to draw any conclusion as to what products account for the bulk of this product group or in what type of exercise they are used, nor about which products are increasing and which are declining.

### **5.9 Other Articles and Equipment for Play or Outdoor Games, *not included elsewhere in this chapter (CN chapter 95)***

Imports of this aggregate product group were worth SEK 565 million in 2007, up from SEK 488 million in 2006 and SEK 399 million in 2005. The main export countries were China, Denmark, Finland, USA, Hong Kong, Germany and Norway. The balance came from a great number of countries, mostly in Europe and Asia. There is no way of knowing what these products are or in what plays or games they are used.

### **5.10 Fishing Rods, Reels, Fishhooks and other Line Fishing Product**

Imports of fishing gear amounted to SEK 179 million in 2007, up from SEK 155 million in 2006 and SEK 147 million in 2005, which made fishing the sport with the second biggest imports of equipment to Sweden after golf.

Imports of fishing rods were worth SEK 39 million in 2007, up from SEK 35 million in 2006 and SEK 33 million in 2005. The biggest exporters of fishing rods were China and South Korea followed by the Netherlands, Hong Kong and Germany.

Imports of fishhooks were worth SEK 20 million in 2007, SEK 23 million in 2006 and SEK 20 million in 2005. The leading export countries were Taiwan, Norway, China, Hong Kong and USA.

Imports of fishing reels were worth SEK 36 million in 2007, SEK 24 million in 2006 and SEK 21 million in 2005. The biggest exporters were the Netherlands, China, Singapore and South Korea, followed by Japan and Hong Kong.

Imports of other line fishing equipment, including spinners, spoons and other artificial bait, are also significant, worth SEK 84 million in 2007, SEK 74 million in 2006 and SEK 73 million in 2005. The biggest exporters of these products were China, USA and the Netherlands, followed by Finland, Taiwan, Germany and Norway. The balance came from a great number of countries in the Far East and Europe.

## 6 Channels of Distribution

An exporter of sports clothes or sports goods can contact several different types of importing companies. Most branded sports goods are sold through *wholesalers*, often called general agents or sole distributors. For branded goods it is necessary to sell through a sole distributor not least because of the need for brand promotion and after sales service. Wholesalers are also an important channel for sports clothes. They usually sell to smaller independent retailers, but also to department stores and hypermarkets. There are no wholesalers in the garment business that do not import themselves.

The goods can also be sold directly to *large retailers*, such as chains of sport goods retailers, hypermarkets and department stores. Multiple store chains import most of their merchandise themselves, but may occasionally also buy certain items from wholesalers. Voluntary retail chains operate in the same way as the multiple store chains.

Sports products sold directly to large retailers are often unbranded or labelled with unknown brands. But the same retailers may also stock and sell branded varieties of the same products. Some of the sport goods retailer chains have their own brands, private brands, but this practice is most common with regard to sports clothes and sports accessories.

*Mail-order companies* import directly and seldom buy from wholesalers.

Foreign manufacturers' *sales companies* import garments from their mother company's factories abroad. An exporter interested to do CMT work for these companies should contact the head offices.

Swedish manufacturers import garments that have been sewn abroad under a CMT type contract.

Exporters of sports garments may also choose to work with a *commission agent* (there are hardly any commission agents working in the sports goods trade). Many agents prefer to work with well-known brands made in Europe or USA. That saves them the work involved in developing, together with a manufacturer not familiar with Sweden, a line of garments suitable for the Swedish market.

Commission agents sell to multiple stores and voluntary chains, to department stores and sometimes to mail-order companies, but not to importers/wholesalers nor to manufacturers.

Importers/wholesalers, importing retail chains and mail-order companies involve themselves in varying degree in the process of designing the garments or creating a line of sports clothes together with the overseas manufacturer with whom they collaborate. This is often necessary as it is difficult for a manufacturer in another part of the world and in a different climate to develop sports clothes for the Swedish market.

It is impossible to give general advice regarding which type of importer would be the best choice. The choice depends on the type of product, price range, fashion content and other considerations. For a manufacturer of sports goods who is not known in Sweden, perhaps the best way to enter this market is to negotiate a deal with one of the manufacturers who own internationally advertised brands. A majority of the exports of quality sports goods from the Far East are sold under

American or European brand names. Manufacturers in USA and Europe, as well as in Japan, find labour costs too high in their home countries and arrange for some of their products to be manufactured in low-wage countries, mainly in the Far East.

For technically uncomplicated products with a low unit price, there are good opportunities for new exporters, either through established wholesalers or through direct sales to large retail chains. But cheap versions of sophisticated sports goods will not find a large market in Sweden.

Sports clothes, as defined in this market brief, are sold in many different types of shops and also by mail-order. Specialist sports goods retailers are the most important type of shops for both sports clothes and goods. A limited range of sports goods is also sold by mail-order and at department stores, large hypermarkets and petrol stations.

The total number of sports goods shops in Sweden (including specialist shops such as golf stores, etc.) is estimated to be around 1,400. The number of chain stores is growing every year at the expense of small independent stores.

There are three large voluntary chains of sports goods retailers who do much of their purchases through central purchasing offices. The largest chain by turnover is Stadium, with more than 100 stores in Sweden, Denmark and Finland. Intersport has 145 stores in Sweden and Stadium 62. Other big chains are Sportex, Golf Store Group, Sportringen, Naturkompaniet, Just4Sport, Löplabbet and Budo & Fitness. These ten chains stand for two thirds of the total sports sales in Sweden. As mentioned above, most of the sports goods chains import directly, although they also buy from importers/wholesalers and other suppliers in Sweden.

Sports clothes and a limited range of sports goods are also sold in departmental stores and large hypermarkets. Åhlens is the largest department store chain with 79 stores. The consumers' co-operative Coop has 62 hypermarkets which all carry ranges of sports clothes and goods. In addition to these there are some large independent hypermarkets.

Both Åhlens and Coop import directly as well as buy from domestic suppliers. Åhlens imports mostly from Asia and has its own buying offices in Hong Kong, Shanghai and New Delhi. Coop imports nonfood products (including sports goods and clothes) through Intercoop Limited. These goods are mainly manufactured in Asia as well.

The six biggest fashion chains in Sweden have two thirds of the total garments sales, but a much lower share of the sports clothes market. This is because several of these companies do not really carry a sports clothes range and only some of the items covered in this market brief.

## 7 Seasons and Trade Practices

For **sports clothes** there are two distinct seasons although they overlap to some extent. Retail sales of clothes for the winter sports season start in September-October. Sales to the retailers by importers/wholesalers begin in the early spring for delivery in September-October. The importers start working on their winter collections at least a year before and begin to place orders in November or December of the previous year. Mail-order companies place import orders at least two month earlier than the garment trade in general, as they have to photograph the

collection and print a catalogue in time for the season's start. See the separate market brief about the mail-order business.

The purchasing pattern regarding sports clothes for the summer season is similar but shifted six months, so that the importers start placing import orders in May or June and place the last orders in September-October. Again the mail-order companies place order about two months earlier.

The more important the fashion aspect of the garment is, the later importers and retailers will decide on what to order. For certain garments, such as are worn in gyms for instance, the buying goes on almost round the year. For the sale of such garments, colour, cut and trim may be more important than the time of the year. And as fashion changes faster today than before, it is good business not to stock too much of an item but reorder more frequently.

Because of the distinct seasons for most types of garments, deliveries must be on time. Swedish importers do not accept delays. They will result in cancellation of the order or in a demand for a large discount. A ski jacket arriving in Sweden too close to or after Christmas cannot be sold to retailers. The same goes for swim wear arriving later than April-May.

The importers of **sports goods** take orders from retailers in the early autumn for delivery the following spring. After that they place their orders with overseas manufacturers later in the autumn, often in October, for delivery in Sweden in the early spring next year, beginning at the end of January or early February. The goods are delivered to retailers from February through May, although repeat orders may specify a later delivery date. Goods for the winter season are sold to retailers in the winter or early spring for delivery from September onwards.

Because the sports goods trade is so seasonal in Sweden, it is very important that delivery times are honoured. Late deliveries are often returned as the goods are very difficult to sell and may have to be kept in a warehouse a year before they can be sold the following year.

Normally payment for imports from the Far East is against Letter of Credit, although long-term trading relationships may lead to other terms. Exporters in Europe usually sell against invoice.

## 8 Trade Fairs

The biggest sports trade fair in Sweden is Swesport ([www.swesport.se](http://www.swesport.se)). Swesport is arranged at Sollentuna Expo Center every year in mid January by Svenskt Sportforum. Please refer to **Section 12** for contact details. Swesport is also arranged in mid March at Swedish ski resort Åre.

But there is no point in exhibiting at the Swesport fair unless one has a distributor, an importer/wholesaler, in Sweden. This fair is where Swedish importers/wholesalers exhibit their products to Swedish retailers. A visit might be useful to see what will be sold on the Swedish market next season, but to find new suppliers Swedish importers visit the big German trade fairs:



- Ispo Winter ([www.ispo-winter.com](http://www.ispo-winter.com)) in Munich is arranged every year in January/February. The fair presents all kinds of winter sports equipment and clothes.
- Sports Source Europe ([www.sports-source-europe.com](http://www.sports-source-europe.com)) in Munich is arranged every year in June/July. It covers most kinds of sporting goods and apparel.
- Spoga+Gafa ([www.spogagafa.com](http://www.spogagafa.com)) in Cologne, a sports and camping goods fair, is arranged every two years in August/September.
- Outdoor ([www.european-outdoor.de](http://www.european-outdoor.de)) for sports and camping goods is arranged in Friedrichhafen in July every year.
- Golf Europe ([www.golf-europe.com](http://www.golf-europe.com)) takes place once a year in October. It is arranged in Munich and covers golf equipment as well as clothes.

Importers of sports clothes also visit trade fairs in the Far East. They travel widely to see old and new suppliers. In order to contact Swedish importers, exporters can exhibit at fashion fairs in their own countries or at international fashion fairs in Europe or the Far East. Or they can contact importers or agents by letter or fax and make appointments to visit them in Sweden. The Textile Importers' Association of Sweden will supply exporters with their list of members for a small fee. For contact details please refer to **Section 12**.

## **9 Product Guarantees, Safety and CSR**

According to the Swedish Consumer Sales Act there is a general three-year limit for complaints, which applies to the relationship between retailer and consumer. This is not a guarantee but gives the consumer the right to complain about malfunctioning or bad quality up to three years after purchase, and get compensation if the fault lies with the retailer or manufacturer. The law puts the burden of proof on the consumer, however.

This law has not made formal manufacturer's guarantees less important from a retailer's point of view. Many retailers insist on including in the purchase contract a stipulation granting them compensation by the importer/manufacturer if they become liable to claims from consumers.

There is also a Product Safety Act in force, which makes the manufacturer/importer responsible for damages to the user of a product or for damages to a third party due to faults or the malfunctioning of a product. This law also applies to sport goods.

For information regarding forbidden chemicals, complaint regulations and marking and labelling regulation for clothes, please see the market brief for garments.

### **9.1 Corporate Social Responsibility - CSR**

In a time when the consumers' demands imply that moral aspects and marketing often go hand in hand, companies have introduced Codes of Conduct. It is the larger chain stores that stand up for and pursue this development. From time to time the larger newspapers have published scandalous articles about the working conditions in clothing factories in

Asia, including those delivering to the large Swedish sports chains. The Scandinavian consumers are quite conscious about these issues, and the small chain stores and importers will also be forced to revise their routines and comply to the common system.

A recent development within European CSR (Corporate Social Responsibility) is the BSCI (Business Social Compliance Initiative). BSCI is a collaboration platform where some 170 companies (June 2008), mostly from the garments sector, strive to accomplish better working conditions in their supplying companies. About 30 Swedish companies are members of BSCI. BSCI has developed a common monitoring system simplifying and standardising the requirements and individual monitoring procedures.

The BSCI is based on the labour standards of the International Labour Organization (ILO) and other important international regulations like the UN Charta for Human Rights, as well as on national regulations. The Initiative aims at continuously improving the social performance of suppliers, leading to Best Practice like SA8000 certification or equivalents and thus sustainably enhancing working conditions in factories worldwide. Information about BSCI can be found at [www.bsci-eu.org](http://www.bsci-eu.org).

## 10 Custom Tariffs, Import Regulations and Licensing

As a member of the European Union, Sweden follows the rules and regulations and applies the integrated customs tariff of the European Communities.

The EU GSP (Generalised System of Preferences) scheme grants products from developing countries either duty-free access or a tariff reduction. For the period 2006-2008 there are three types of arrangements in force:

- most beneficiary countries enjoy the benefit of the general GSP arrangement,
- the special incentive arrangement for sustainable development and good governance (GSP+) provides additional benefits for certain countries,
- the special arrangements for the least developed countries (LDCs), also known as the Everything But Arms (EBA) initiative, grants duty-free and quota-free access to the EU market.

All GSP countries except China enjoy duty-free entry for all the sports goods dealt with in the market brief. The products must have a GSP certificate of origin to enjoy the free entry into the EU. Sports goods are not subject to quotas or licensing.

The least developed GSP countries, called SPGC countries, enjoy duty-free entry for their sports garment and leather sports glove exports to the European Union. The other GSP countries, called SPGI countries, have a preferential duty 20% lower than the conventional duty on textile products and 40% lower on leather gloves, except China, which does not enjoy the preferential 20% duty reduction on garments nor the 40% duty reduction on leather gloves.

The GSP+ countries also enjoy freedom of customs duty when exporting sports garments and leather sports gloves. The GSP+ countries are Bolivia, Colombia,

Costa Rica, Ecuador, Georgia, Guatemala, Honduras, Sri Lanka, Mongolia, Nicaragua, Panama, Peru, El Salvador and Venezuela. The products must have a GSP certificate of origin, which for products of woven fabrics requires domestic production in two stages (weaving and sewing) and for knitted goods in three stages (spinning, knitting and sewing).

From 1 March 2008 most products originating in Moldavia can be imported to the EU duty-free and in unlimited quantities.

Under separate agreements, the following countries and groups of countries enjoy duty-free entry for sports goods into the EU: EFTA countries (Norway, Iceland, Switzerland and Lichtenstein), most countries in Central Europe, many Mediterranean countries, South Africa, Chile and Mexico. Negotiations are in progress between the EU and ACP (77 countries in Africa, the Caribbean and Pacific Ocean) regarding new partnership agreements for free trade to replace the Cotonou agreement. There are also ongoing negotiations with the Mercosur countries (Argentina, Brazil, Paraguay and Uruguay) and the Gulf Cooperation Council.

Information about customs tariffs from individual countries can be obtained from the Swedish Customs. See **Section 12** for contact details.

Only a few countries are subject to EU textile quotas or surveillance after the general abolishment of the quota system. Of the sports clothes in this market brief, track suits, ski wear and ski suits of knitted fabric are subject to double-check surveillance when exported from Belarus. Track suits of knitted fabric and all ski wear are subject to quotas when exported from North Korea.

## 10.1 Rates of Duty in 2008

For sports wear, the following rates of duty apply:

<b>Articles of tricot, jersey or knitwear</b>		
6112.1100		
6112.1200	Track suits	12%
6112.1900		
612.2000	Ski wear and ski suits	12%
612.12.31-49	Swim suits and trunks	12%
612.12.31-49	Swim suits and trunks containing at least 5% rubber thread	8%
<b>Garments of woven fabrics</b>		
6211.1100-1200	Swin suits and trunks	12%
6211.2000	Ski wear, ski suits	12%
<b>Sports gloves of leather</b>		
4203.2100	Sports gloves of leather	9%

The duty on the sports goods in this market brief is 2.7%, except on tennis rackets, ice skates and fishing equipment, which have the following rates of duty:

9506.51	Tennis rackets	4.7%
9506.70	Ice skates	0%
	Roller skates	2.7%
9507.10	Fishing rods	3.7%
9507.20	Fishhooks without leaders	1.7%
	Other fishhooks	3.7%
9507.30	Spinning reels	3.7%
9507.90	Other line fishing products	3.7%

## 10.2 Open Trade Gate Sweden

In order to facilitate for exporters from non-EU countries to enter the Swedish market the Swedish government has created Open Trade Gate Sweden ([www.opentradegate.se](http://www.opentradegate.se)), located at the National Board of Trade which is Sweden's governmental agency for foreign trade and trade policy.

The purpose of Open Trade Gate is to provide exporters with information about rules and regulations, investigate and try to solve barriers to trade and influence Swedish and EU trade policies and development strategies. The Open Trade Gate service is free of charge.

## 11 Summary and Recommendations

The consumption of sports clothes and goods in Sweden is relatively high compared to the rest of Europe. 2007 was an extremely successful year for the sports trade. It is very common for Swedes to dress in casual or sporty wear for work as well as leisure. The consumers are increasingly fashion conscious.

Almost all sports clothes and goods that are sold in Sweden are imported. In fact, the imports exceed consumption, since there is substantial re-export of these products.

Branded products dominate the Swedish market. In the sports clothes market there are many very strong brand names, promoted by Swedish or international manufacturers and importers as well as the large retail chains. A great part of the sports clothes are sold to young people, who, when they can afford it, will prefer a well known branded product over an anonymous one. The brand names are also often emblazoned on the outside of garments, not discreetly shown on a sewn in label.

This means that for a new exporter to succeed in Sweden he or she will need to collaborate with an importer who can sell the garments under his brand name. To introduce his or her own brand name in Sweden would be virtually impossible for a new exporter to this country. So the first choice would be to find an importer with whom to collaborate. For a manufacturer of sports goods, negotiating a deal to sell the products under a known brand name is probably the best opportunity as well.

Most commercial agents do not have the facilities or the financial resources to create a brand name for an anonymous imported line of garments. This is why they usually prefer to work with already well-known brands.

Mail-order companies could be of interest to an exporter trying to find a market for his or her sports clothes in Sweden. The need to have a brand name is much less for garments sold by mail.

The best way to contact Swedish importers would be at the international trade fairs in Europe and the Far East. A visit to Sweden would have to be carefully planned with appointments made well in advance by fax or mail. When meeting Swedish buyers, garments exporters should know that most business is done on a long-term basis in which exporter and importer collaborate to develop garments suitable for the Swedish market.

It is useful for the exporter to know that Swedish buyers know what it costs to make a garment. They are not interested in bargaining down an initially too high price. But offers of goods at unrealistically low prices are also not welcome. Reasonable quality in relation to price and reliable deliveries are what Swedish buyers are looking for.

## 12 Some Useful Addresses and Links

### Trade Organisations

#### **Textile Importers' Association in Sweden**

Box 92073, SE-120 07 Stockholm  
Phone: +46 8 505 970 92  
Fax: +46 8 505 970 95  
E-mail: [info@textileimporters.se](mailto:info@textileimporters.se)  
Internet: [www.textileimporters.se](http://www.textileimporters.se)

#### **Svenskt Sportforum**

*(Swedish Sports Forum)*  
Box 22307, SE-104 22 Stockholm  
Phone: +46 8 505 865 97  
Fax: +46 8 505 865 99  
E-mail: [kontakt@svensksportforum.se](mailto:kontakt@svensksportforum.se)  
Internet: [www.svensksportforum.se](http://www.svensksportforum.se)

#### **Association of Swedish Suppliers of Golf Equipment**

Båtsmansklevet 2, SE-129 40 Hägersten  
Phone: +46 8 767 49 49  
Fax: +46 8 767 49 49  
E-mail: [anders.westerlund@sglf.se](mailto:anders.westerlund@sglf.se)

#### **Spofa Spöfiske** *(Spofa Rod Fishing)*

Box 22307, SE-104 22 Stockholm  
Phone: +46 8 505 865 97  
Fax: +46 8 505 865 99  
E-mail: [kontakt@spofaspofiske.se](mailto:kontakt@spofaspofiske.se)  
Internet: [www.spofaspofiske.se](http://www.spofaspofiske.se)

#### **National Association of Bicycles and Sport Goods Retailers**

Box 92073, SE-120 07 Stockholm  
Phone: +46 8 505 970 40  
Fax: +46 8 505 970 49  
E-mail: [info@csrservice.se](mailto:info@csrservice.se)  
Internet: [www.csrservice.se](http://www.csrservice.se)

### Other Organisations

#### **Association of Swedish Chambers of Commerce and Industry**

Box 16050, SE-103 21 Stockholm  
Phone: +46 8 555 100 00  
Fax: +46 8 566 316 30  
E-mail: [tradeoffice@chamber.se](mailto:tradeoffice@chamber.se)  
Internet: [www.cci.se/trade](http://www.cci.se/trade)

#### **The Swedish Association of Agents**

Box 3146, SE-103 62 Stockholm  
Phone: +46 8 411 00 22  
Fax: +46 8 411 00 23  
E-mail: [mail@agenturforetagen.se](mailto:mail@agenturforetagen.se)  
Internet: [www.agenturforetagen.se](http://www.agenturforetagen.se)

#### **Swedish Federation of Trade**

SE-103 29 Stockholm  
Phone: +46 8 762 77 00  
Fax: +46 8 762 77 77  
E-mail: [info@svenskhandel.se](mailto:info@svenskhandel.se)  
Internet: [www.svenskhandel.se](http://www.svenskhandel.se)

#### **Swedish Distance Sellers**

*(Swedish Mail Order Association)*  
Torggatan 19, SE-503 34 Borås  
Phone: +46 33 13 17 70  
Fax: +46 33 12 53 17  
Internet: [www.postorder.se](http://www.postorder.se)

### Authorities

#### **National Board of Trade**

Box 6803, SE-113 86 Stockholm  
Phone: +46 8 690 4800  
Fax: +46 8 30 67 59  
E-mail: [kommerskollegium@kommers.se](mailto:kommerskollegium@kommers.se)  
Internet: [www.kommers.se](http://www.kommers.se)

#### **Swedish Consumer Agency**

Box 48, SE-651 02 Karlstad  
Phone: +46 771 42 33 00  
Fax: +46 54 19 41 95  
Internet: [www.konsumentverket.se](http://www.konsumentverket.se)

#### **Statistics Sweden**

Box 24300, SE-104 51 Stockholm  
Phone: +46 8 506 948 01  
E-mail: Contact form via Internet  
Internet: [www.scb.se](http://www.scb.se)

#### **Swedish Customs**

Box 12854, SE-112 98 Stockholm  
Phone: +46 771 520 520  
E-mail: Contact form via Internet  
Internet: [www.tullverket.se](http://www.tullverket.se)  
Customs tariffs: <http://taric.tullverket.se>

## Some Useful Links

Official Gateway to Sweden	<a href="http://www.sweden.se">www.sweden.se</a>
Open Trade Gate Sweden <i>provides information and helps exporters to solve bureaucratic obstacles that might occur when trading with Sweden.</i>	<a href="http://www.opentradegate.se">www.opentradegate.se</a>
eMarketServices <i>guide to electronic market places.</i>	<a href="http://www.emarketservices.com">http://www.emarketservices.com</a>
Trade Fairs in Scandinavia	<a href="http://www.fairlink.se">http://www.fairlink.se</a>
European Union	<a href="http://ec.europa.eu">http://ec.europa.eu</a>
European Committee for Standardization	<a href="http://www.cenorm.be/cenorm">http://www.cenorm.be/cenorm</a>
European Customs	<a href="http://ec.europa.eu/comm/taxation_customs/customs/index_en.htm">http://ec.europa.eu/comm/taxation_customs/customs/index_en.htm</a>
European Statistics - EuroStat	<a href="http://ec.europa.eu/eurostat">http://ec.europa.eu/eurostat</a>
Exporting to the EU - Advice for Developing Countries	<a href="http://exporthelp.europa.eu">http://exporthelp.europa.eu</a>

## Appendix 1

### Currency Conversion

Average exchange rate of the Swedish currency SEK							
	Average rate in SEK						
	2000	2003	2004	2005	2006	2007	Jan - May 2008
1 US Dollar \$	9.17	9.72	8.09	7.35	7.48	6.76	6.16
1 Euro € *	8.45	9.13	9.13	9.28	9.26	9.25	9.38
* The following 15 EU-countries use the Euro as their currency: Austria, Belgium, Cyprus, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, Malta, Portugal, Slovenia, Spain, The Netherlands.							
Source: Swedish Central Bank (Riksbanken)							

## The Scandinavian Market

There are many similarities among the Scandinavian countries with regard to culture, language, political and social systems etc. Also when it comes to consumer behaviour and product preferences you find many similarities.

When entering one of the Scandinavian markets it therefore might be relevant to consider the possibilities in the other Scandinavian countries as well.

All three Scandinavian countries have import promotion facilities. Below you will find a short presentation of the import promotion organisations in Denmark, Norway and Sweden who have jointly published "Exporting to Scandinavia - a guide for exporters from developing countries".

Inhabitants:	Denmark	5.4 million
	Norway	4.7 million
	Sweden	9.1 million



### Denmark

The Danish Import Promotion Programme (DIPP) is integrated in the Danish Chamber of Commerce and operates under a contract between the Danish International Development Assistance (DANIDA) and the Danish Chamber of Commerce.

The objective of DIPP is to assist exporters/producers in Africa, Asia and Latin America to enter the Danish market.

At DIPP's website [www.dipp.eu](http://www.dipp.eu) you can read more about DIPP and its activities, download or order market information material regarding the Danish market or register your business offer to be advertised on the website.

#### Contact details:

The Danish Chamber of Commerce / DIPP  
Boersen, Slotsholmsgade  
DK-1217 Copenhagen K, Denmark  
Phone: +45-3374 6000  
Fax: +45-3374 6080  
E-mail: [dipp@danskerhverv.com](mailto:dipp@danskerhverv.com)  
Internet: [www.dipp.eu](http://www.dipp.eu)

### Norway

Department of international trade cooperation (DITC), is established according to an agreement between NORAD (Norwegian Agency for Development Cooperation) and HSH (Federation of Norwegian Commercial and Service enterprises). DITC is integrated in HSH - but is fully sponsored by NORAD. DITC promotes imports from developing countries.

From the website [www.hsh-org.no](http://www.hsh-org.no) you can read more about the programme. Through the website you can also access a database where suppliers in developing countries interested in the Norwegian market can register. Studies of the Norwegian market for specific sectors can be downloaded from the website.

#### Contact details:

HSH – Department of International Trade Promotion  
P.O. Box 2900 Solli,  
NO-0230 Oslo, Norway  
Tel: +47-2254 1700  
Direct tel: +47-2254 1752  
Fax: +47-2256 1700  
E-mail: [edg@hsh-org.no](mailto:edg@hsh-org.no)  
Internet: [www.hsh-org.no](http://www.hsh-org.no)

### Sweden

Within the trade promotion programme of the Swedish Chambers assistance is provided to exporters from Africa, Asia and Latin America. The overall aim of the programme is to contribute to sustainable economic growth in developing countries by strengthening the capacity and competitiveness of exporters.

From the website [www.cci.se/trade](http://www.cci.se/trade) you can learn more about the programme, download or order market reports as well as register your business inquiry free of charge in the database Chamber Trade ([www.chambertrade.com](http://www.chambertrade.com)).

The programme is funded by the Swedish International Development Cooperation Agency (Sida) and the Swedish Chambers of Commerce.

#### Contact details:

Swedish Chambers of Commerce  
Trade Promotion  
PO Box 16050  
SE-103 21 Stockholm, Sweden  
Phone: +46-8-555 100 00  
Fax: +46-8-566 316 30  
E-mails: [tradeoffice@chamber.se](mailto:tradeoffice@chamber.se)  
[tradeoffice@chambertrade.com](mailto:tradeoffice@chambertrade.com)  
Internet: [www.cci.se/trade](http://www.cci.se/trade)



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[www.chambertrade.com](http://www.chambertrade.com)



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*Swedish Chambers*

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