



# **The Food and Beverage Market Entry Handbook: Switzerland**

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



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agricultural  
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# The Food and Beverage Market Entry Handbook

Switzerland

Written by Agra CEAS Consulting

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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: Switzerland

This Handbook is intended to act as a reference for those agri-food producers planning for, or in the process of entering the Swiss market. This Handbook provides **step-by-step guides** on entering the agri-food market in Switzerland including relevant information such as **analysis of the Swiss 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 Swiss 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 Switzerland 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, and 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 Swiss 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 Swiss market.

## 2 Country introduction and overview



<b>Capital:</b>	Bern
<b>Population:</b>	8.6 Million
<b>Area:</b>	45 285 Km <sup>2</sup> (The world's 132 <sup>nd</sup> largest country by area)
<b>Political structure:</b>	Semi-direct democratic federal republic
<b>Major languages:</b>	German (62.1% of the population) French (22.7%) Italian (8.2%) Romansh (0.5%)
<b>Major religions:</b>	Catholic (34.4%) Atheist (29.4%) Swiss Protestant (22.5%) Islam (5.4%) Others (8.3%)
<b>Life expectancy:</b>	83.7 years (Male 81 years, Female 85.1 years)
<b>Currency:</b>	Swiss Franc ( <b>CHF</b> ); 1 EUR = 1.08 <b>CHF</b> (2021 average)
<b>GDP growth (real):</b>	3.72% (2021)
<b>Exports:</b>	40% of GDP (2021)
<b>Imports:</b>	53.7% of GDP (2021)
<b>Main exports*:</b>	Chemical and pharmaceutical products (52%), Machinery (13%), watches (8%)
<b>Main imports*:</b>	Gems, precious metals (34.1%), pharmaceutical products (13.1%), machinery including computers (6.5%)
<b>Unemployment rate:</b>	5.3% (2021 average)
<b>Labour force:</b>	67.4 % (2021 average)
<b>Main industries:</b>	<b>Agriculture:</b> 0.6 % of GDP <b>Industry:</b> 25 % of GDP <b>Services:</b> 74.4% of GDP
<b>Average household income (2020):</b>	EUR 115 000
<b>Household expenditure on food and beverages (2020):</b>	EUR 7 400
<b>Food and beverage market size (2020):</b>	EUR 48 bn

Sources: Euromonitor International: Economies and Consumers, 2021; IMF; UN, World Bank; WHO, OECD. \* Goods only listed, Meat, cheese or booze: What do Swiss spend the most money on?, The Local CH available at <https://www.thelocal.ch/20210212/explained-what-do-people-in-switzerland-spend-their-money-on/>

## 2.1 Country overview: Switzerland at a glance

### 2.1.1 Past economic and political trends

- *Switzerland was originally formed in 1291 as an alliance to stand up to the Hapsburg dynasty, the country was known as the Confoederatio Helvetica (CH).*
- *Modern-day Switzerland was formed in 1848 to address internal divisions in the country, the new constitution gave cantons devolved powers which resulted in the country remaining largely stable ever since.*
- *Switzerland has adopted a neutrality approach to international affairs, this allowed the country to escape the destruction seen in Europe during both world wars although the country's mountainous geography was also a factor.*
- *Switzerland's neutrality and prosperity have resulted in the country being a large mediator in international political issues, and in attracting large "apolitical" international organisations to set up headquarters or offices in the country.*

Switzerland was originally formed in 1291 by an alliance of cantons to stand against the Habsburg dynasty and was known as the Confoederatio Helvetica (Swiss Confederation). This original name is also why Switzerland today is often identified by the initials CH.

Divisions regarding religion and language led to internal fighting in Switzerland during much of the period between the 13<sup>th</sup> and mid-19<sup>th</sup> century which ultimately led to the country adopting a new constitution in 1848 which formed the modern-day state of Switzerland in its current political structure. The new constitution established federal powers for the areas of defence, trade and legal matters while other issues were developed to the canton level. From the adoption of the constitution until the present-day Switzerland has enjoyed largely uninterrupted economic and social development.

During both world wars, Switzerland appeared as an island of peace surrounded by warfare as the country was politically neutral which was respected by all sides of both conflicts. This allowed Switzerland to retain its industrial sector and internal infrastructure at a time when most of Europe was devastated by warfare; in turn allowing Switzerland to remain relatively prosperous throughout most of the 20<sup>th</sup> century.

Switzerland's position as a politically neutral country has allowed it to operate as a mediator for larger countries to negotiate issues with this being a common practise during the cold war era and this is a role it still serves today. Swiss neutrality also impacts its foreign policy with trade agreements being the main foreign policy instrument of successive Swiss governments (rather than other forms of international agreement or integration). This helps to explain why the country did not join the original European Economic Community, opting to be a founding member of the European Free trade area (EFTA) instead. Switzerland's stability and neutrality have attracted several large "apolitical" organisations to set up their headquarters or offices in Switzerland which include organisations such as the world economic forum, FIFA and the United Nations.

Switzerland for the past few decades has remained economically and politically stable which in turn has encouraged continuous investment into the country. All of this is underpinned by the country's "direct democracy" system which is one of the unique voting systems in the world and

is hailed as giving citizens a larger voice on internal and domestic politics; however, it does arguably make the regulatory process of Switzerland slower than in other European countries.

### 2.1.2 Current economic situation and mid-term outlook

- *Switzerland has gradually opened to joining some international organisations and agreements during the period of 2000-2022 with the country joining the UN in 2002 and the Schengen zone in 2008.*
- *Switzerland's economy is heavily influenced by the wider economic environment; the global recession of 2008 impacted the Swiss economy however the country fared better economically than most other European countries during this period.*
- *Switzerland's stability, economic innovation and political influence as a mediator have helped the country to be continuously ranked highly amongst most human development indexes such as life expectancy, GDP per capita and innovation.*
- *Looking ahead, Switzerland is highly likely to remain a country that is ranked highly amongst most human development indexes as economic stability and innovation in the country continues to spur economic growth in what is already a highly developed country.*

Switzerland's economy is intrinsically tied to other western European countries and the wider globe resulting in international slowdowns of economic activity impacting the country's services and banking sectors. This was seen in the immediate post-9/11 global economic slowdown and also in the global recession of 2008. Switzerland though has remained a largely stable and prosperous nation often ranking either 1<sup>st</sup> or in the top five of many human development indicators such as life expectancy, GDP per capita and global innovation.

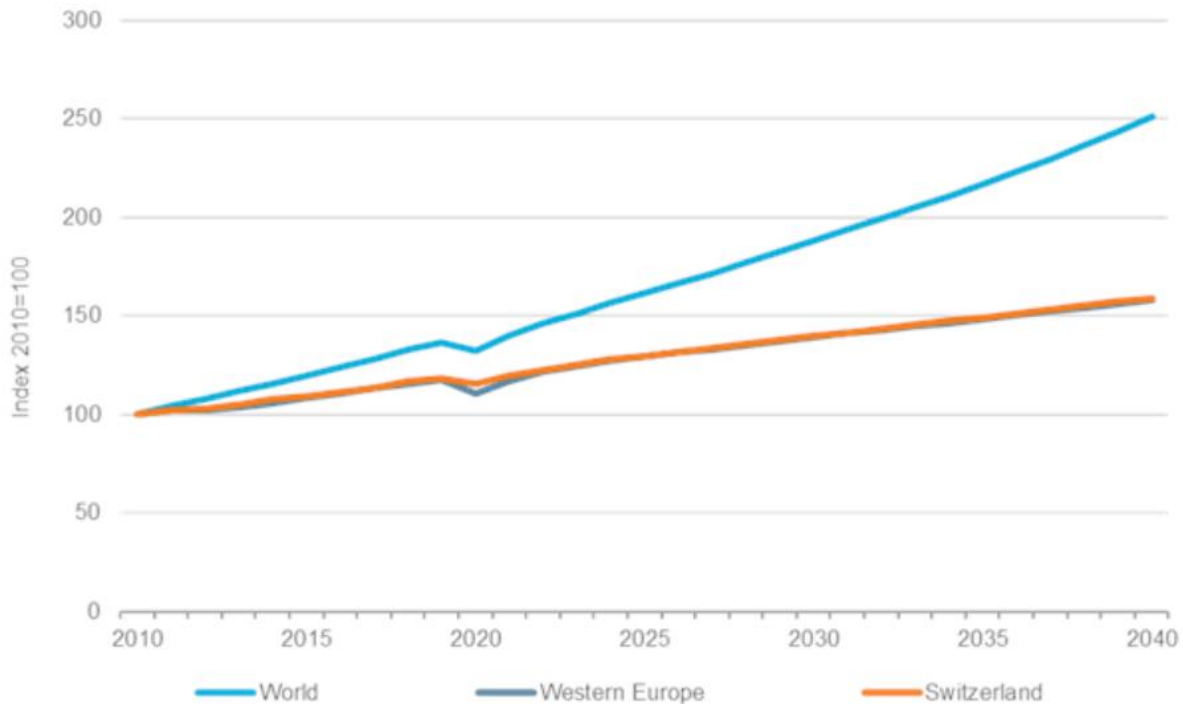
Switzerland has gradually opened up to joining international agreements and organisations during the period of 2000-2021 with the country joining the United Nations in 2002 and the Schengen zone in 2008; although the country remains largely against joining international organisations which extend beyond trade, peace or finance.

The country has also retained its direct democracy system which results in Switzerland having one of the highest rates of referendums on average for any country as a referendum can be called on any issue as long as a petition receives 100 000 signatures (roughly 1.2% of the population). This gives citizens a large say in both the foreign and internal political environment of the country; for example citizens have the right to vote on Swiss foreign trade agreements or to ban certain products/practices.

Despite economic upheavals during the outbreak of COVID-19, the Swiss economy continues to grow and going forward it is likely that Switzerland will remain a hub of financial, political and

innovation which will continue to spur economic development in the already highly developed country.

**Figure 2-1: Real GDP Growth and Per Capita GDP in Switzerland: 2010-2040 (Projected)**



Source: Euromonitor International: Economies and Consumers, 2021

### 2.1.3 Populations trends

- Switzerland is one of the most linguistically diverse countries in Europe having a total of four officially recognised languages with German-speaking citizens being the largest percentage of the population followed by French, Italian and finally the minority language of Romansch.
- Roughly 75% of the Swiss population is concentrated in the country's central plain which accounts for 30% of the country's total land area. Only two cities, Lugano and Basel are located outside of the Swiss central plain.
- Around a quarter of the country's population are either recent immigrants or from an immigration background. 85% of Switzerland's total immigrant population is from another European country.
- Swiss government projections predict that the population may reach 11.6 million by 2050 in a high growth scenario, most projections predict a population of at least 10 million by 2050, largely influenced by immigration and a high life expectancy.

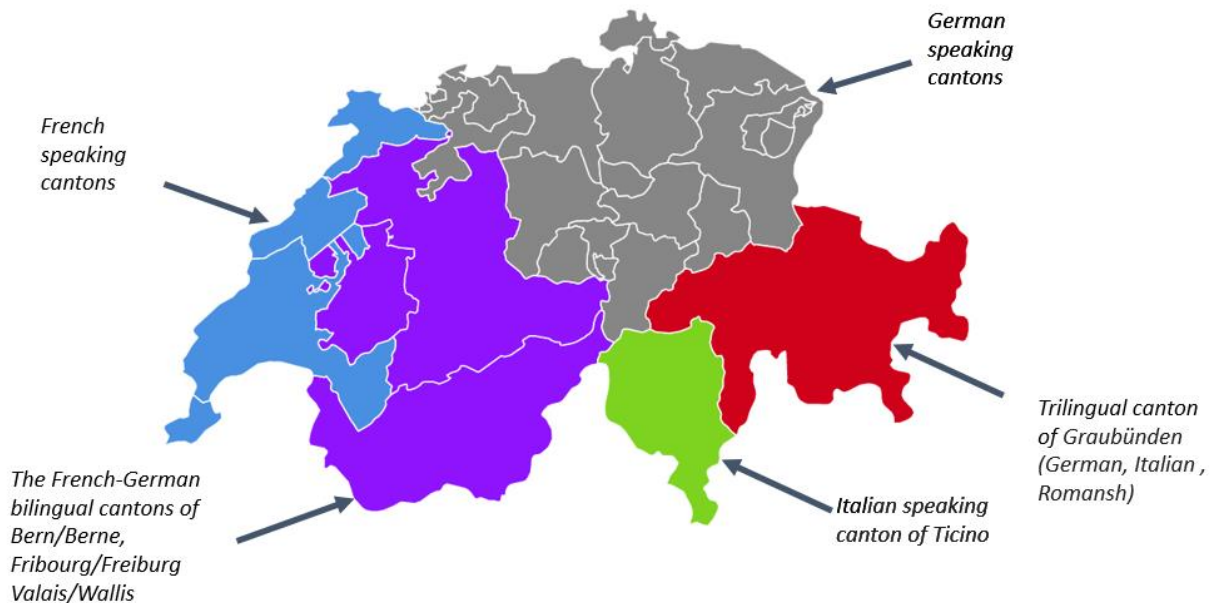
Switzerland is home to 8.6 million people which ranks it as the world's 102<sup>nd</sup> most populous country and the 20<sup>th</sup> most populous in Europe. The country is quite urbanised with roughly 74% of the population living in urban areas of the country.

Language is a unique trait of Switzerland with the country having four official languages. German is the most spoken language in the country with the population of German speakers being focused in the central and north of the country including the cities of Zurich and Basel as shown in Figure 2-2; the German-speaking part of Switzerland accounts for 65% of Switzerland's land area and 62.6% of the population. French is the second biggest language spoken in Switzerland being focused in the western part of the country near the border with France, 22.9% of the Swiss population are native French speakers focused in the cities of Geneva and the bilingual capital of Bern. Italian is the third biggest language spoken in the country focused in the south around the city of Lugano near the border of Italy; native Italian speakers account for 8.2% of the country's population. Romansh is the country's final official language with the language being officially recognised in the canton of Graubünden. The total speakers of Romansh are around 40 000 (0.5% of the population).

Despite lower numbers compared to the other major languages, there are regions of Switzerland where Romansh is the majority language such as the municipality of Lumnezia. Romansh is however a minority language and its very likely that native speakers will also speak one of Switzerland's other official languages, most likely German.

There are also considerable numbers of native English, Portuguese and Spanish speakers in Switzerland due to immigration. English in particular is often used as a de-facto neutral language amongst Swiss citizens speaking to other Swiss citizens from a different language background, although bilingualism amongst the country's official languages is quite high in general.

**Figure 2-2: The language map of Switzerland by canton**

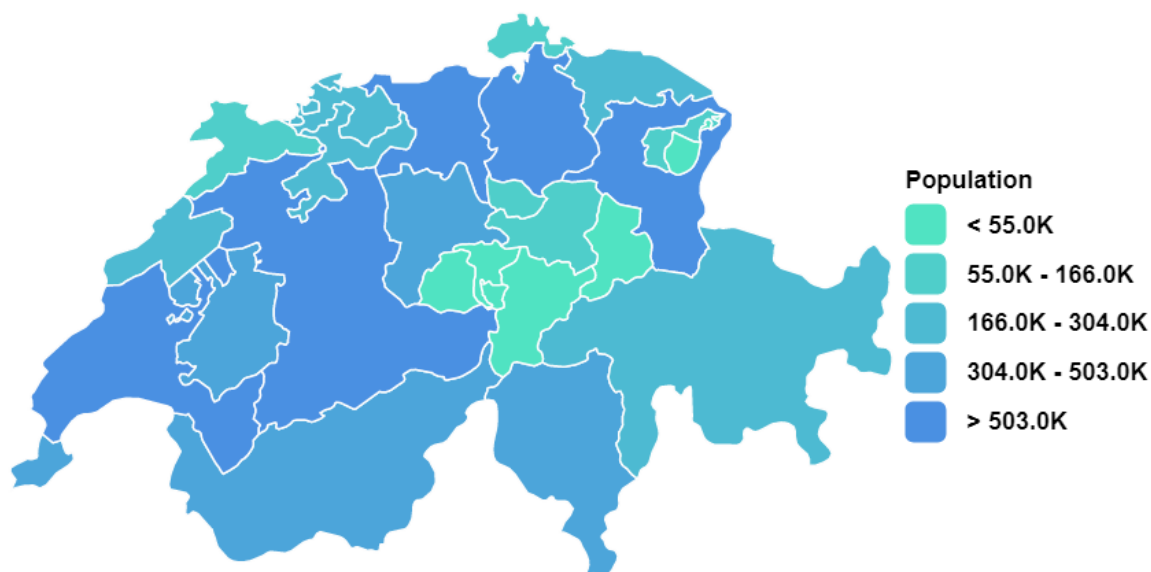


Source: Agra CEAS based on various

All of Switzerland's major cities except for Basel and Lugano are located in the central plain region of the country and all settlements with a population above 50 000 outside of the aforementioned cities of Basel and Lugano are also located in the Swiss central plain (see Figure 2-3). Zurich is the most populous canton in Switzerland with a population of 1.5 million, this is followed by the

canton of Bern with a population of roughly 1 million and the canton of Vaud with a population of 785 000. The least population canton is Appenzell Innerrhoden with a population of just 15 000. Geography plays a key role in population distribution which explains why the Swiss population is so concentrated in a central plain though it only accounts for just 30% of the country's total land area.

**Figure 2-3: Federal cantons of Switzerland by population**



Source: Agra CEAS based on various

This Swiss fertility rate peaked around the beginning of the 1960s at a rate of 2.6 children per woman and has been declining ever since although the rate of fertility has remained consistently around 1.5 children per woman in recent years.

According to projections from the Swiss government, the population could reach as high as 11.3 million by 2050 in a high population growth projection scenario, most likely it will reach at least 10 million by 2050.<sup>1</sup> Population growth in the country is influenced heavily by a combination of a high life expectancy coupled with high levels of immigration to Switzerland; at present in 2022 it is estimated that roughly a quarter of the population living in Switzerland were foreign born with Italians, Germans and Portuguese being amongst the largest immigrant communities in Switzerland.

Switzerland's demographics have also been influenced by conflicts occurring both with Europe and wider afield with a large number of immigrants arriving in Switzerland during the Yugoslav wars in particular. Overwhelmingly, around 85% of immigrants living in Switzerland have arrived from other European countries with arrivals from Italy, Germany and Turkey being amongst the larger immigrant groups

<sup>1</sup> National Projections, The Federal Statistics office of Switzerland, available at <https://www.bfs.admin.ch/bfs/en/home/statistics/population/population-projections/national-projections.html>

**Figure 2-4: Age Pyramid in 2019 and 2040 in Switzerland**

Source: Euromonitor International from national statistics/UN, 2021

Note: Data for 2040 is forecast

## 2.2 Geography and key markets

Even by European standards, Switzerland is a relatively small country with a land area of just 45 000 km<sup>2</sup>. This ranks the country as the 31<sup>st</sup> largest European country by land area ahead of Belgium but behind Denmark. Switzerland however is the 20<sup>th</sup> most populous country in Europe resulting in a country with a high population density of roughly 206 people per square km.

As stated earlier, 75% of the Swiss population lives in the country's central plain which accounts for just 30% of the country's total land area, in the central plain the largest cities of Switzerland can be found with Zurich, Geneva and Bern being located here. The Alps mountain range covers roughly 58% of the country and is home to 11% of the population. The other major geographical region of Switzerland is the Jura mountain range which accounts for 12% of the country's landmass.

Geopolitically, Switzerland is a landlocked country surrounded by Austria France, Germany, Italy and the microstate of Liechtenstein. Despite being landlocked, Switzerland has utilised the river Rhein which flows from the country into the North Sea to gain sea access to international markets.

## 2.2.1 Overview of urban markets

Switzerland is a confederation made up of a total of 26 cantons (*also referred to as provinces or departments*). The cantons are *federated states* which mean each canton has a relatively high degree of independence with each canton having devolved powers concerning issues such as healthcare, welfare, law enforcement, public education and powers surrounding taxation. Each canton also defines its own official language and operates its court and judicial system. The federal state of Switzerland therefore mainly focusses on matters concerning defence, foreign policy, customs and monetary policy and finally national legislative concerns.

Overall, Switzerland can be best described as a country made up of many independent regions which have continued to agree to co-operate together under a confederation agreement but continue to operate largely independently on issues impacting them locally.

**Figure 2-5: Federated Cantons of Switzerland**



Source: Agra CEAS based on various

**Table 2-1: Federal Cantons of Switzerland**

Federal Canton	Capital
Aargau	Aarau
Appenzell Ausserrhoden	Herisau
Appenzell Innerrhoden	Appenzell
Basel-Landschaft	Liestal

Basel-Stadt	Basel
Bern	Bern
Fribourg	Fribourg
Geneva	Geneva
Glarus	Glarus
Graubünden	Chur
Jura	Delemont
Lucerne	Lucerne
Neuchatel	Neuchatel
Nidwalden	Stans
Obwalden	Sarnen
Schaffhausen	Schaffhausen
Schwyz	Schwyz
Solothurn	Solothurn
St. Gallen	St. Gallen
Thurgau	Frauenfeld
Ticino	Bellinzona
Uri	Altdorf
Valais	Sion
Vaud	Lausanne
Zug	Zug
Zurich	Zurich

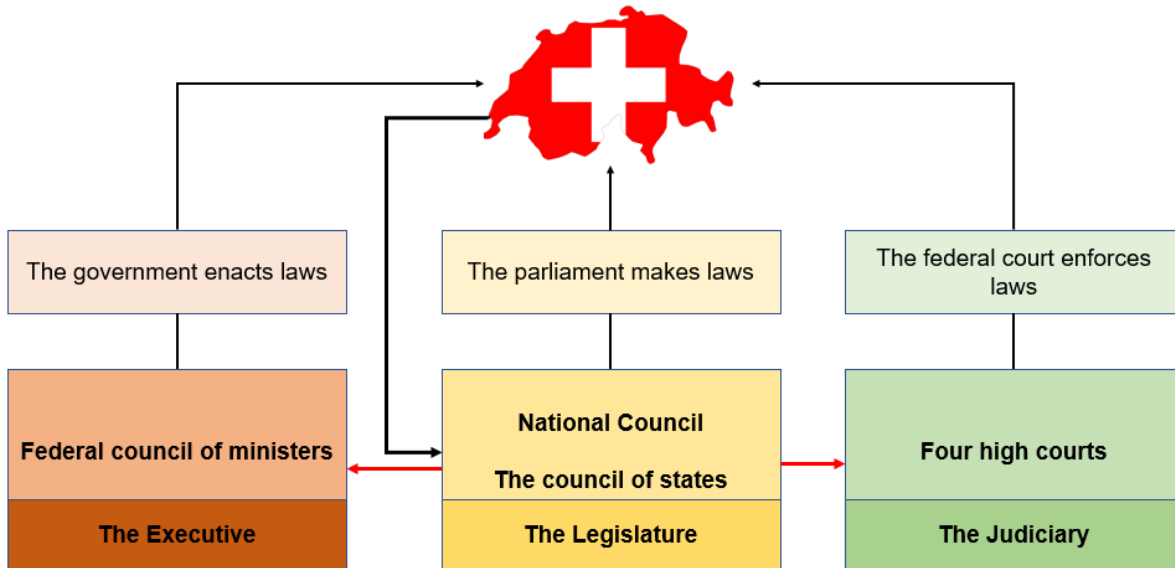
Source: Agra CEAS based on various

As mentioned above, Switzerland is governed under a federal system at three levels, firstly is the confederation level, the canton level and finally the communal level. The country's direct democracy model means that Swiss citizens get a final vote on most major legislative changes occurring in both the federal country and within the canton.

Switzerland is governed at a federal level by the federal council a seven-member collegial body representing the major political parties of Switzerland who make decisions based on the consensus of the population of the country. Federal councillors are elected by the United Federal Assembly, which consists of an upper and a lower chamber. The National Council is the lower

house and represents the people. The Council of States is the upper house and represents the cantons. Delegates from eleven different parties set forward their views in the current parliament.

**Figure 2-6: Overview of the federal political structure of Switzerland**

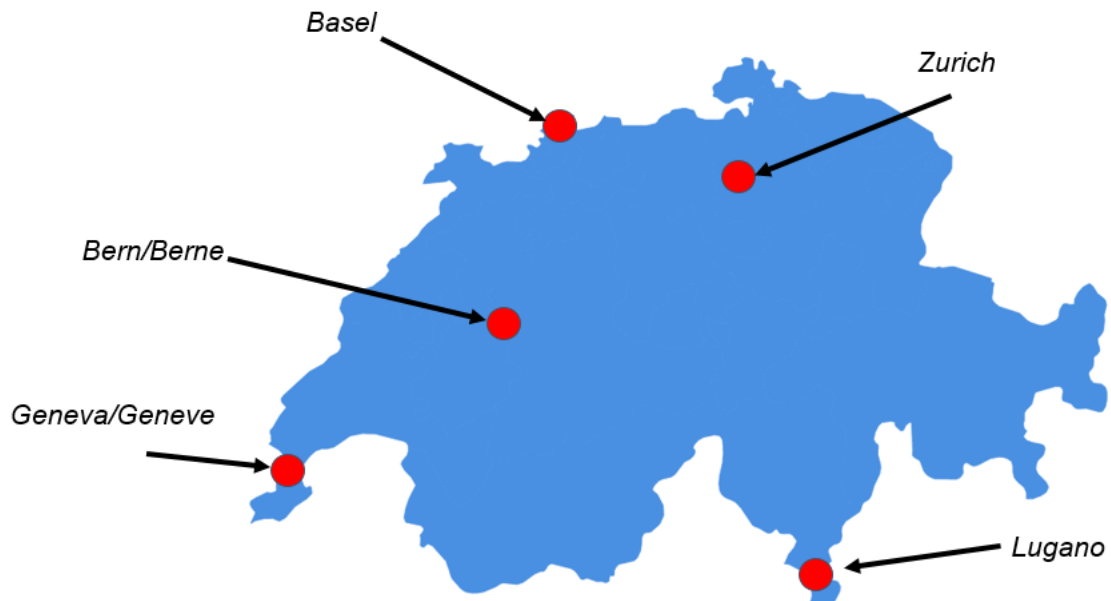


Source: Agra CEAS based on various

## 2.2.2 Snapshots of important markets

Switzerland as a largely urbanised country is home to a number of large cities such as Zurich, Geneva, Basel, Lugano and Bern. The Swiss cities of Zurich and Geneva are well known internationally as hubs of both political and economic activity with many major international organisations and financial companies having offices in these two cities. This helps the two cities to continue to attract immigrants which has sustained population growth in these cities. Both of these cities are within the vicinity of EU member states with Geneva being located just 9 km from the border of France and less than a 2-hour drive from the major French city of Lyon. Zurich and particularly Basel are also located close to the border of Germany which encourages cross-border trade between these cities and Germany; with Basel is located within the vicinity of France as well as Germany. Lugano is the major Italian-speaking city of Switzerland and is extremely close to the Italian border being just an hour and a half drive away from the major Italian city of Milan which encourage cross-border trade between Lugano and the economically prosperous northern region of Italy.

**Figure 2-7: Location of focus markets**



Source: Agra CEAS

## Zurich



**Stadt Zürich**

### **Key facts:**

**Total GDP (2021, estimated):**

*EUR 124 billion*

**Population:**

*1.8m (Metropolitan)*

Zurich is the largest city in Switzerland and the capital of the larger canton of Zurich. The city is located in the north of Switzerland's central plain and is predominantly German speaking. Zurich is a major hub in Switzerland for the country's railroad, road, and air traffic with the Zurich airport and central railway station being the busiest in Switzerland.

Zurich is best known as a financial city with some of the biggest financial institutions of the world basing their headquarters or offices in the city such companies include Credit Suisse, UBS and Swiss RE. This has elevated the global significance of Zurich far pass what a city with its population would generally have on the global stage with numerous indexes listing Zurich amongst the top ten most powerful cities in the world in recent years, largely due to the city's large banking sector. Zurich is also ranked as one of the richest cities in the world with per-income earnings amongst people living in Zurich being generally very high; a reflection of the city's development and the cost of living in Switzerland.

As a city with several opportunities for skilled workers from outside of Switzerland, the city has attracted a large number of immigrants in recent decades. Today roughly a third of people living in the city do not have Swiss citizenship. Germans represent the largest immigrant group living in Zurich accounting for roughly a quarter of all immigrants living in Zurich; this is followed by Italians, Portuguese and Spanish citizens with also a sizable number of Austrian, French and British immigrants. The large number of European immigrants living in Zurich coupled with the international nature of doing business results in the city being a key market for EU food and beverages.

There is no shortage of French, German and Italian restaurants in Zurich coupled with products from these three countries in particular commonly being stocked in Swiss food retailers. Key opportunities to showcase new products to citizens in Zurich include during the city's many weekly foods markets such as market Brupbacherplatz and Tessinerplatz market.

The city also hosts several food festivals throughout the year with a full list being found in section 8.4.

Sources: Canton Zurich, Location-specific advantages, available at <https://www.zh.ch/en/wirtschaft-arbeit/wirtschaftsstandort/standortvorteile.html> My Switzerland, Visit Zurich, available at <https://www.myswitzerland.com/en-us/destinations/zurich/> EuroCities, Zurich, available at <https://eurocities.eu/cities/zurich/>

## Geneva/Geneve



### **Key facts:**

**Total GDP (2021, estimated):**

*EUR 41 billion*

**Population:**

*630 000 Thousand*

Geneva (*Genève* in French) is the second largest city in Switzerland and is the largest city in Switzerland that is French speaking. The city is located in the west of Switzerland and lies extremely close to the border of France. The city has a population of around 630 000 and has seen continuous population growth in several recent years as citizens and immigrants travel to the city for work.

Geneva is a global city, acting as a hub of finance and worldwide diplomacy. Geneva is home to many departments of the United Nations and also home to many international organisations such as the Red Cross. Geneva has acted as a city where international negotiations and mediation on issues can take place, a reflection of the city's prosperity but also a reflection of Switzerland's wider approach to neutrality in international affairs. Like Zurich, Geneva is one of the richest cities in the world with the average income per capita amongst residents living in Geneva being amongst the highest globally.

Geneva is also a major hub for international commodity trading with the city being the largest trader of sugar, grains, cotton and ethanol. The large economic opportunities present in Geneva have attracted several immigrants to the city even by Swiss standards with the largest immigrant group being Portuguese at 7.4%, French at 5.5%, Italians at 4% and Spanish at 3% of Geneva's total population.

There is no shortage of opportunities to showcase EU food and beverages in the city of Geneva whether through the many international conferences and meetings that take place in the city or through the city's large international scene with restaurants from most major EU food and beverage producers being found in the city. Key opportunities to showcase food and beverage products to new consumers in Geneva include the city's many food markets and the city's food festival.

Sources: My Switzerland, Visit Geneva, Available at <https://www.myswitzerland.com/en-us/destinations/geneva/>  
Geneva Travel, Lonely Planet, Available at <https://www.lonelyplanet.com/switzerland/geneva>

## Basel



### **Key facts:**

**Total GDP (2021, estimated):**

*EUR 12 billion (estimated)*

**Population:**

*180 000 (Metro)*

Basel is the third largest city in Switzerland by population with a population of around 180 000. The city is located in the north of Switzerland and is the largest city in Switzerland that is not located on the country's central plain. The city of Basel lies directly south of both France and Germany and is a city that continues to attract cross-border commuters who travel from both countries to Basel for work. The majority of the population of Basel is German speaking with Italian interestingly being the second largest spoken language despite the city's proximity to France, French is the third largest spoken language in the city.

Basel is often referred to as the cultural capital of Switzerland as the city is home to many museums with some of the largest and oldest museums in both Switzerland and Europe being found in the city of Basel. Basel is also home to most of the large Swiss chemical industry companies with chemical production becoming to focus of Basel's industrial output in recent years. The city is also home to a number of large pharmaceutical companies such as Novartis.

Basel is also a key banking hub with the transnational bank for international settlements being located in Basel, banking and finance however play a smaller role in the economy of Basel compared to Zurich and Geneva. Basel's location between both France and Germany combined with the city's economic stability and prosperity has long acted as a pull factor for immigrants with the largest immigrant group in Basel being Germans followed by Italians and Turks.

Food and beverages from the EU are common in Basel as the city sits between two large EU food and beverage producers and is also exposed to numerous restaurants which are themed after EU member states. Basel in its own right is known for several different foods such as Fastenwahe, Basler Brot and Schlumbergerli.

Sources: My Switzerland, Visit Basel, Available at <https://www.myswitzerland.com/en-us/destinations/basel/> | I am Expat, Basel, Available at <https://www.iamexpat.ch/lifestyle/cities-switzerland/basel-city-guide>

## Bern/Berne



### **Key facts:**

**Total GDP (2021 estimated):** EUR 4.6billion

**Population:** 130 000 (city)

The city of Bern is the de-facto capital city of Switzerland and is often referred to as the “federal city”. The city has a total population of around 130 000 which ranks the city as the fourth most populous city in Switzerland. The city is also the capital of the wider Bern canton which is the second most populous canton in Switzerland. Bern is home to many of Switzerland’s most important institutions such as the federal assembly.

Bern has long attracted the attention of large multinational companies the city’s economy is best known for its large presence of SME companies who operate out of the city as it’s generally cheaper than operating in larger cities in Switzerland and Bern itself is known as a hub of innovation and technology.

Bern like many Swiss cities has a large immigrant population, with the immigrant population of the city accounting for roughly a third of all of the city’s residents. Germans are the largest immigrant group found in Bern followed by Italians and Spanish citizens. EU food and beverages are common in the city which is further aided by its large immigrant population from EU countries.

There are several food markets located throughout Bern and the city further acts as a city to showcase goods not only to residents living in the city but to residents living in the wider Bern canton. The biggest food festivals in the city take place between June-September, a full list of the major festivals and events relating to food and beverages in Bern can be found in section 8.4.

Sources: Official website of Bern, Bern city commune, available at <https://www.bern.com/>, Visit Bern, Lonely Planet, available at <https://www.lonelyplanet.com/switzerland/bern> My Switzerland, Bern, Swiss Tourist Board, available at <https://www.myswitzerland.com/en-us/destinations/bern/>

## Lugano



### **Key facts:**

**Total GDP (2019, estimated):**

*EUR 750 million*

**Population:**

*63 000 thousand (city)*

Lugano is the largest Italian-speaking city in Switzerland and also the largest city in the Italian-speaking canton of Ticino. Lugano is located in the south of Switzerland and is the second largest city that is not located on the Swiss central plain. Lugano is within the immediate vicinity of the Italian border and cross-border travel and trade is commonplace.

Lugano is the ninth most populous city in Switzerland with a population of 64 000; however, as the largest Italian-speaking city in the country with a close proximity to Italy, it is a key market for EU food and beverages in Switzerland. Roughly a quarter of the population of Lugano are Italian citizens and it is estimated that around a third of the workforce in Lugano is made up of cross-border commuters. Tourism, finance and commerce are the backbone of the economy of Lugano with the city being the third largest banking centre in Switzerland after Zurich and Geneva.

Several food festivals take place in Lugano yearly such as the Lugano street food festival and Festa d'Autunno. Lugano as a large tourism hotspot in Switzerland also acts as a key gateway to attracting new consumers of EU products of both a Swiss and international background.

Sources: Visit Lugano, Region of Lugano council, available at <https://www.luganoregion.com/>, Lonely Planet, Lugano, available at <https://www.lonelyplanet.com/switzerland/ticino/lugano>, My Switzerland-Lugano, Swiss Tourist Board <https://www.myswitzerland.com/en-us/destinations/lugano/>

## 2.3 Domestic agricultural production and regions

Soils, terrain and climate do not favour agricultural production particularly and the country's food self-sufficiency rate is comparatively low for Europe at around 50 per cent.

Switzerland's agriculture is mainly dominated by small-scale farms. A typical Swiss farm tends to have a size of around 20 ha. The number of farms has been decreasing since 2000 as in particular very small farms have been affected by structural changes in the country. Many farms produce both: crops and livestock.<sup>2</sup>

<sup>2</sup> Will Switzerland be able to feed itself in the future? (2022), <https://www.thelocal.ch/20220630/will-switzerland-be-able-to-feed-itself-in-the-future/>

Farming is usually intensive and involves a high level of mechanisation. Intensive farming is even gaining momentum in Switzerland's mountain regions. Indoor production is becoming more popular and the number of greenhouses for vegetable production as well as indoor poultry fattening units is increasing. Temporary greenhouses (e.g. plastic sheeting) are also commonly used on fields at an early stage to protect young potatoes, berries etc.

In total, about 35% of the total land area is used as farmland. Regions with a lot of farmlands are situated on the Central Plateau, in the southern parts of Jura and the Pre-Alps in the east of the country. On the other hand, there is not much agricultural land in Ticino, Valle Mesolcina and certain areas of Valais.

About 30% of farmland is utilised for arable crops, close to 35% for permanent grassland and another 35% are Alpine agricultural areas with main pastures. Overall, agricultural land can be divided into three zones in Switzerland. The plain zone is very suitable for agricultural production and nearly makes up half of the total farmland. The hill zone accounts for about one-fourth of agricultural production and the remaining parts can be attributed to mountain regions.

Over the years Switzerland has lost part of its farmland, in particular in the plain zone due to growing settlements, infrastructure or industry. The mountain zone lost part of its grassland due to forest encroachment. Overall, most farmland lost has been arable fields and Alpine pastures, as well as vineyards, orchards and horticultural land.<sup>3</sup>

In 2021, about 7 500 organic farms were operating in Switzerland. The number of organic farms in the country more than doubled compared to about two decades ago and today they account for over 16% of total farms in Switzerland.<sup>4</sup>

Overall, agricultural production in the country, while limited in volume is very diverse in nature and includes fruits, vegetables, grains and fodder as well as vineyards and pasture.

## **Fruit**

Fruits are grown on about 6 000 ha and half of that area is dedicated to the cultivation of different apple varieties. The main fruit-growing regions are Lower Valais, northern Jura, Central Plateau between the Napf region and Lake Zurich, and Thurgau. In particular, the Valais region stands out due to its sufficient sunshine and irrigation. Orchards are very common in these regions,. However, traditional orchards are increasingly being replaced with intensively managed orchards such as dwarf-tree varieties. Though the major fruit is apple, many other different fruits such as pears, apricots, cherries and berries are grown in Switzerland.

## **Vegetables**

Vegetable farming is a vital branch of farming in Switzerland. Vegetables are planted either outside or inside greenhouses. Vegetables are grown in different areas of Switzerland such as the Rhône valley and the Bernese Seeland. Carrots, sugar beets, potatoes lettuces, beans, peas, cabbages, and onions are mainly grown outdoors, whereas cucumbers, tomatoes and red peppers are mainly grown in greenhouses.<sup>5</sup>

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<sup>3</sup> Farmland, <https://www.vogelwarte.ch/en/atlas/evolution/farmland>

<sup>4</sup> Organic farming continues to gain ground in Switzerland (2021), <https://lenews.ch/2021/05/14/organic-farming-continues-to-rise-in-switzerland/>

<sup>5</sup> Vegetable and fruit cultivation, <https://www.swiss-farmers.ch/knowledge-and-facts/production/vegetable-fruit-cultivation/>

## Livestock

Livestock production is a vital part of Switzerland's agricultural production and takes place in many different areas but predominantly in Mittelland and the pre-Alps. Livestock includes cattle, pigs, sheep, horses, and poultry.

Most notably, cattle is the primary agricultural segment of the country. The income from the dairy and cattle industry accounts for as much as two-thirds of the total agricultural value. In areas of cattle farming, such as the eastern part of the Plateau grassland is very common as well as maize to feed the cattle herds. Cows commonly are fed fresh grass during the summer and conserved roughage in the winter. Concentrate is not commonly used in Switzerland as a feed.<sup>6</sup>

In addition to its meat, cattle are used for dairy production to make products such as milk, butter, cheese, yoghurt, and milk chocolate.<sup>7</sup>

## Crops

In the western part of the Central Plateau crops, in particular cereals such as wheat, barley, rye, and oats, dominate agricultural production. The use of crop rotation is common. In western Mittelland, a grain production area has spread due to its sheltered location next to the Jura Mountains, with light rainfall. In the wetter eastern region, mainly in the cantons of Thurgau and Sankt Gallen, fodder production is more popular. In total, around 450 000 ha, or over one-tenth of Switzerland's total area is used for the production of seasonal or permanent crops. Areas that produce the largest amounts of wheat in particular are Bern, Vaud, Fribourg, Zürich, and Aargau.

## Viticulture

Around 15 700 ha is used for viticulture, which produces about 130 million litres of wine annually. Areas in which viticulture is present usually have a mild climate. The biggest vineyards, at approximately 5 200 ha each, can be found in Valais and the Lake Geneva area, followed by Ticino where vineyards usually have a size of 1 400 ha each. The region around Lakes Biel, Neuchâtel and Murten is known for their large vineyards as well. Vineyards larger than 100 ha are also located in the cantons of Zurich, Schaffhausen, Grisons, Aargau, St. Gallen, Thurgau and Basel-Landschaft. The highest vineyard in central Europe is located in the Valais region and can be found at 1 200 metres.<sup>8</sup>

More than 200 different grape varieties can be found in Switzerland. The most common ones are Chasselas, which is used to produce white wine and Pinot Noir, which is used to produce red wine. Together they account for around three-fifth of total wine production. Other popular varieties include but are not limited to the following: Gamay, Merlot, Humagne Rouge, Arvine and Savagnin Blanc, Gamaret, Garanoir, and Pinot Gris.<sup>9</sup>

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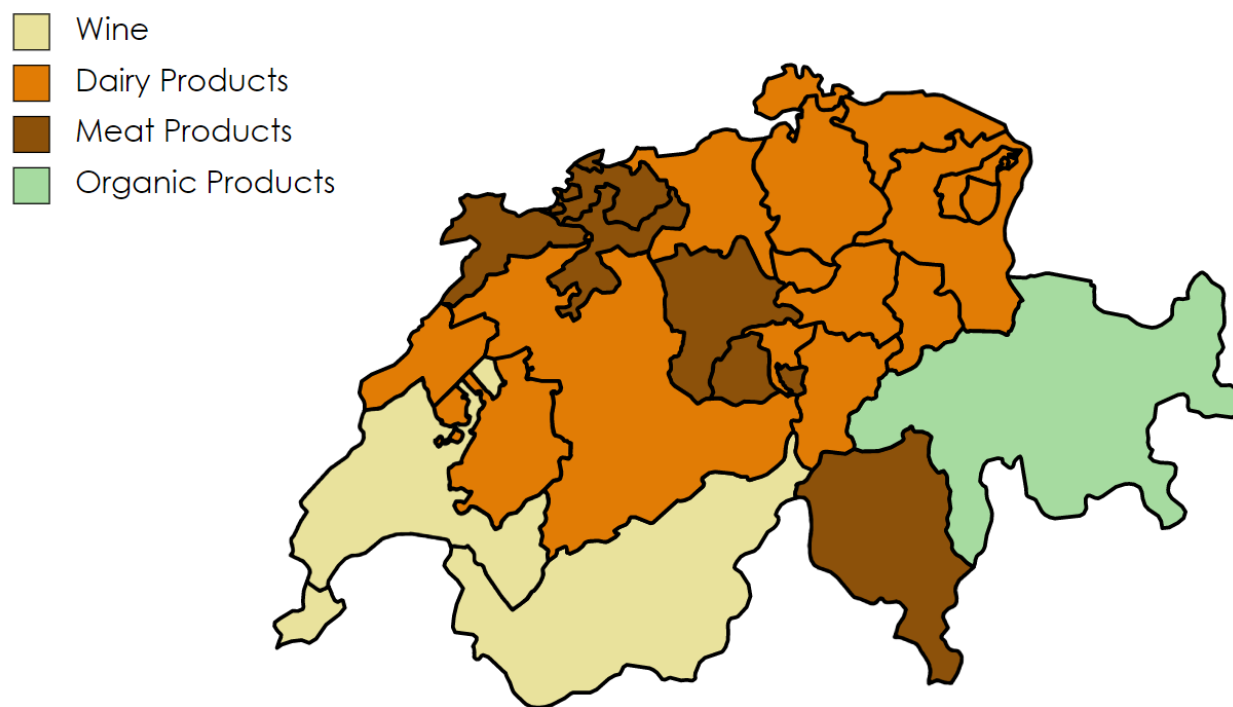
<sup>6</sup> Production, <https://www.swiss-farmers.ch/knowledge-and-facts/production/>

<sup>7</sup> Agriculture and forestry, <https://www.britannica.com/place/Switzerland/Agriculture-and-forestry>

<sup>8</sup> Switzerland – Agriculture, <https://www.nationsencyclopedia.com/economies/Europe/Switzerland-AGRICULTURE.html>

<sup>9</sup> 19 INTERESTING FACTS ABOUT SWISS WINE, <https://swisswine.ch/en/news/19-interesting-facts-about-swiss-wine#:~:text=Over%20200%20grape%20varieties%20are,Gamaret%2C%20Garanoir%2C%20Pinot%20Gris.>

**Figure 2-8 Swiss cantons by agri-food production association**



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 mentioned in section 2.3, Switzerland's agricultural production is currently not sufficient to meet the country's demand, which is why Switzerland has to import goods to meet demand. It is one of the biggest per capita food importers in the world.

Many national and international food manufactures are located in Switzerland as the country offers good opportunities for many different product categories. The production includes local famous products from Rivella or Ricola but Switzerland is also home to the world's largest food company Nestlé; as well as other multinationals important in their segments such as Barry Callebaut (cocoa and chocolate). Indeed, the three largest food producers in Switzerland are Nestlé, Barry Callebaut and Chocoladefabriken Lindt & Sprüngli. In total, the food industry in Switzerland employs more than 90 000 people.

Food manufacturing companies can be separated into different industry branches of which the most important ones for Switzerland are the following: confectionery, beverage production, bakery, meat products, pasta products as well as dairy and milk processing.

The most well-known confectionery manufacturers in Switzerland are Lindt & Sprüngli, Barry Callebaut and Nestlé. Many local Swiss food companies are working in the bakery and pasta industry. Meat is an important part of the Swiss diet, which is why the meat processing sector is very well developed as well. The sector's market leader currently is Bell Food Group AG from Basel.

Ramseier Suisse AG is one of the three biggest beverage producers in Switzerland. The company produces mainly beer, but also apple juice, cider and apple spritzers, fruit juices, mineral water, lemonades and soft drinks. Rivella AG is the second biggest beverage manufacturer with its iconic Rivella drinks, followed by Aproz Sources Minérales SA, which is the leader in the mineral water and syrup category.

Most large food-producing companies are located in the Zürich area, as well as more generally in eastern and north-western Switzerland.<sup>10</sup>

#### 3.1.2 International trade in F&B

The food and beverage market in Switzerland is import-based as the country is not able to fully cover the demand for agricultural products with domestic production. Even though Switzerland aims to be self-sufficient in the agri food sector it imports reach around EUR 10 billion (6% of the country's total imports). It has a fairly low self-sufficiency rate of about 50%. Around 65% of

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<sup>10</sup>List of the 3 largest beverage producers in Switzerland (2022), <https://www.researchgermany.com/list-of-the-3-largest-beverage-producers-in-switzerland/>

Switzerland's imports come from within Europe. Switzerland is the EU's fourth biggest trading partner after the UK, the US and China. The country mainly imports food and beverage products from close by EU countries such as Germany, Italy, France, Netherlands, Spain and Austria.<sup>11</sup>

In 2021 Switzerland exported food, beverages and tobacco products with a total of EUR 9.6 billion. Food exports fluctuated in recent years due to events such as the COVID-19 crisis but generally decreased during the last decades. The EU is Switzerland's number one export destination. The Union mainly imports roasted coffee and tea, water and soft drinks, cheese, as well as chocolate and confectionery items from Switzerland.<sup>12</sup>

Switzerland has been a long-term EU agri-food trade partner, due to its location within Europe and is constantly increasing its agri-food imports from European countries. In 2020 and 2021 imports picked up compared to previous years (Figure 3-1). In 2021, the EU exported a total value of more than EUR 9.8 billion in agri-food products to Switzerland.

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



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

The EU exported over twice the value of agri-food products to Switzerland than Switzerland exported to the EU in 2021.

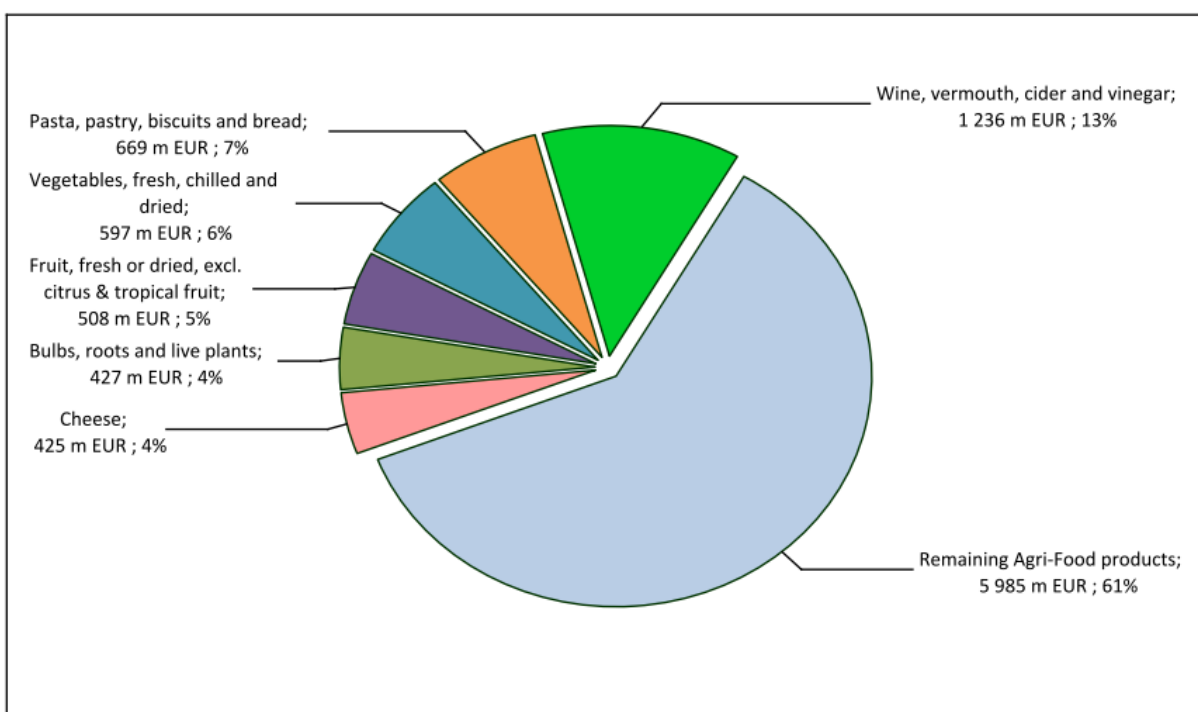
<sup>11</sup> Switzerland Food Products Imports by country, [https://wits.worldbank.org/CountryProfile/en/Country/CHE/Year/LTST/TradeFlow/Import/Partner/by-country/Product/16-24\\_FoodProd#:~:text=In%202020%2C%20the%20top%20partner,%2C%20France%2C%20Netherlands%20and%20Austria.](https://wits.worldbank.org/CountryProfile/en/Country/CHE/Year/LTST/TradeFlow/Import/Partner/by-country/Product/16-24_FoodProd#:~:text=In%202020%2C%20the%20top%20partner,%2C%20France%2C%20Netherlands%20and%20Austria.)

<sup>12</sup> 2021: Exports soar to a new high (2022), <https://www.news.admin.ch/news/message/attachments/70030.pdf>

Wine, vermouth and cider are the largest category exported by the EU to Switzerland with the total trade value of EUR 1.24 billion; accounting for 13% of total EU agri-food exports to Switzerland. Pasta, pastry, biscuits and bread sales amounted to EUR 669 million or 7% of all EU agri-food exports to Switzerland; followed by vegetables, fresh, chilled and dried with a value of EUR 597 million or 6% of the EU agri-food exports. Fruit, fresh or dried, excl. citrus and tropical fruit are another key product category exported from the EU with a value of EUR 508 million (5% of all EU agri-food exports to Switzerland).

However, as Figure 3-2 shows, over 60% of imports from the EU relate to other product categories. These include but are not limited to cheese waters and soft drinks, food preparations, chocolate and confectionery.

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



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

### 3.1.3 The market for imported F&B

As section 3.1.1 outlined, Switzerland's food and beverage market is strongly import-based. In effect, European operators may see many opportunities in successfully entering the Swiss market with their products, aided by various factors including notably: (1) geographical proximity; and (2) the long-term trade relationship between the EU and Switzerland, including the Free Trade Agreement, which has been in force since 1992 and together with different bilateral agreements brings necessary facilitations and benefits (more details in section 4.3.3).

There are several sectors which appear to be particularly attractive for EU exporters. These include, but are not limited to:

- wine (many EU countries are very popular for the old-world wines they offer)
- pasta
- fruit and vegetables (given Switzerland's agricultural production is not sufficient)
- cheese (even though Switzerland is known for its cheeses, it also imports cheeses from EU countries that are not produced within the country)

Finally, high-quality premium products are popular in general; offering good cross-category opportunities for EU exporters.

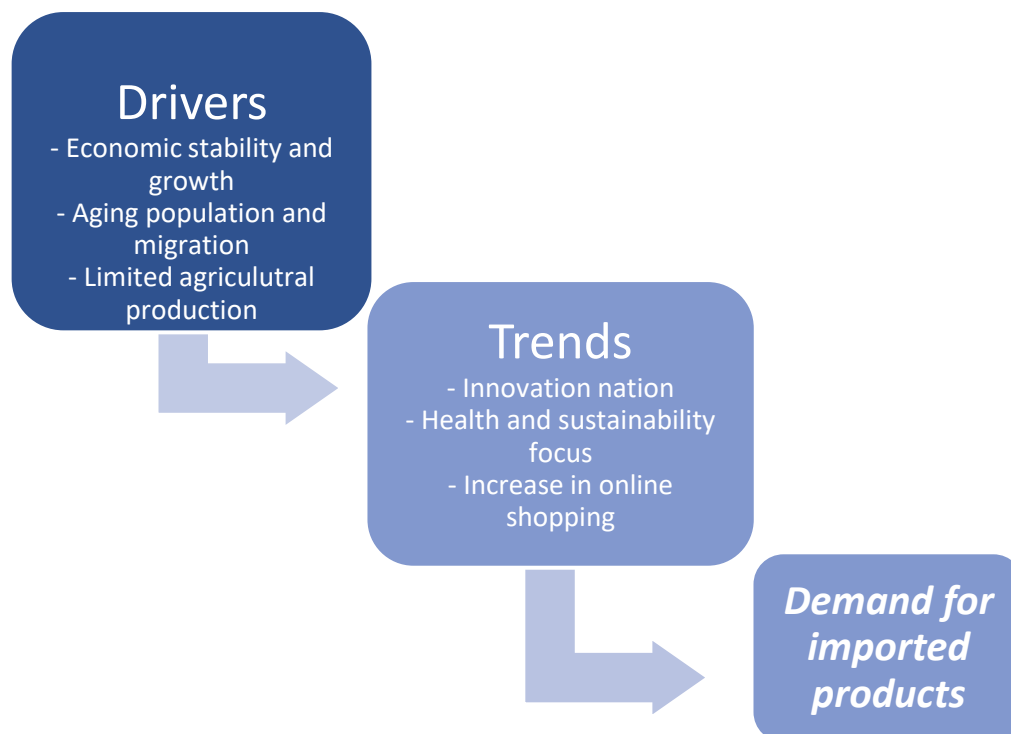
## 3.2 Growth Drivers and Trends

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

- **Economic stability and growth:** Switzerland has a strong economy, which is very stable compared to most other countries across the world. The country is part of the UN and the Schengen zone. Like most countries, Switzerland is also affected by the wider economic and geopolitical environment, though the combination of its economic stability and the neutral stance it takes means impacts are often less pronounced. The global recession in 2008 impacted the country, but arguably to a lower level than EU countries. The COVID-19 pandemic and the war in Ukraine also affect the country; with the latter creating challenges for the country's historical neutrality. Switzerland has not been part of any war during the past 500 years and as a result, has grown into the role of a mediator for conflicts. The political influence in combination with stability and economic innovation means the country rank very high amongst most human development indexes such as life expectancy, GDP per capita and innovation. Switzerland will likely continue on its path and remain a country with high economic stability and innovation, that ranks high in human development indexes, which fosters continues economic growth.
- **Ageing population and migration:** On the one hand the Swiss population is starting to age with the fertility rate falling from 2.6 children in the 1960s to about 1.5 children at present. However, the country's population continues to grow because of ever-higher life expectancies and continues migration. In 2022 around one-fourth of the Swiss population was foreign-born, mainly in Italy, Germany and Portugal. About 85% of all immigrants living in Switzerland are from the EU. According to recent projections, Switzerland's population could increase to 11.3 million people in 2050 in a high population growth scenario; with the population forecast to reach at least 10 million under the baseline scenario.
- **Limited agricultural production:** As mentioned above, Switzerland's self-sufficiency rate for agri-food products is at around 50% (with imported animal feed taken into account), which is a comparatively low number compared to other European countries. However, differences exist across sectors. During the last years, Switzerland was able to produce nearly all of the needed livestock products such as meat and dairy, but only had a self-sufficiency rate of 40% when it comes to plant-based foods. This rate changes yearly due to the high weather dependency of harvests. Switzerland is self-sufficient in milk production as it produces more than its consumers (around 116%); though it can only cover around one-fourth of its fruit demand and around 50% of the domestic demand for vegetables and eggs. As a result, Swiss food imports are one of the highest in the world

in per capita terms because of the country's high population density and a comparatively small area of arable land suitable for cultivation.<sup>13</sup>

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



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

In terms of current trends, the following stand out:

- **Innovation nation.** Switzerland is a centre for innovation and a pioneer in technology and entrepreneurial creativity. It has been raking first in the breakthrough innovation category for the past ten years in a row. Switzerland furthermore was awarded as the third-best location in Europe for start-ups in 2020. Through major multinational companies like Nestlé, Switzerland has a long history of innovation in the international food and nutrition sector; and in recent years has become even more prominent in the area. The country can leverage knowledge from its agricultural industry and aims to become a leader when it comes to redefining value chains. When it comes to agricultural technology Switzerland is working on various technologies such as: precision agriculture to lessen resource consumption; the deployment of blockchains to reinforce the traceability of food ingredients; and the development of cell-based proteins (lab-grown meat). In the area of food retail Switzerland is moving towards zero waste. The country aims to offer more unpackaged foods and to normalise imperfect-looking fresh produce. As Swiss consumers

<sup>13</sup> Does Switzerland produce half of all the food it needs?, [https://www.swissinfo.ch/eng/politics/fact-check\\_does-switzerland-produce-half-of-all-the-food-it-needs-/44380058](https://www.swissinfo.ch/eng/politics/fact-check_does-switzerland-produce-half-of-all-the-food-it-needs-/44380058)

increasingly demand transparency from the food industries technological improvements to supply chain management are becoming more important as well.<sup>14</sup>

- **Health and sustainability focus.** Swiss consumers pay great importance to food that is good for their health and the planet. This means consumers for example pay attention to their meat consumption and aim to consume less sugar and other unhealthy foods, and instead more vegetables, fruits, legumes and nuts. In particular, the COVID-19 pandemic further increased these trends as the Swiss take their health as well as the planet's health more seriously. Sustainability aspects of a product influence consumers' purchase decisions. Many consumers would like to have a bigger range of sustainable food choices available to them, and they would appreciate having more information available on the environmental food print of the products they eat. As such, there are many opportunities for food producers, manufacturers, and retailers in the health and sustainability fields.<sup>15</sup>
- **Increase in online shopping.** E-commerce sales in Switzerland account for around 14% of total retail, which makes the country important when it comes to online shopping.<sup>16</sup> The COVID-19 pandemic powered online sales, as people spent much more time at home than previously and often did not want to come in contact with other people if not necessary. Online retailers grew at a faster pace than many other countries. In 2021, the Swiss e-commerce market had a revenue of around EUR 33 billion. E-commerce is likely to continue to grow in importance due to its convenience and accessibility.<sup>17</sup> Highly active online shoppers in the food and beverage market order items at least once a month and close to one-fifth of them even order weekly. Many people who shop for food online also use restaurant food delivery services.<sup>18</sup>

## 3.3 Consumer profiles and preferences

### 3.3.1 Consumer profiles

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

- **Cultural diversity.** The Swiss culture is very diverse due to the country's location at the crossroads of different European cultures. Switzerland is a multilingual country with four national languages which are German, French, Italian and Romansh. On top of these four languages, many different dialects are spoken. All cantons and municipalities have cultural autonomy and thus unique cultural features that distinguishes them from each other. On broad level, the culture in the central plateau and the mountains is very different, which means that life in the city is very different from life in the Alps. Swiss consumers are proud

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<sup>14</sup>The Swiss FoodTech Ecosystem (2021), <https://www.accenture.com/ch-en/insights/consulting/foodtech-trends>

<sup>15</sup> Food trends: Innovative technologies are indispensable (2021), <https://www.swiss-food.ch/en/articles/food-trends-innovative-technologies-are-indispensable>

<sup>16</sup> Ecommerce in Switzerland grows 25.8% to 12.2 billion euros (2021), <https://ecommercenews.eu/ecommerce-in-switzerland-grows-25-8-to-12-2-billion-euros/>

<sup>17</sup>Switzerland - Country Commercial Guide (2022), [https://www.trade.gov/country-commercial-guides/switzerland-ecommerce#:~:text=In%202021%2C%20sales%20in%20Switzerland,billion\)%20in%20foreign%20online%20shops.](https://www.trade.gov/country-commercial-guides/switzerland-ecommerce#:~:text=In%202021%2C%20sales%20in%20Switzerland,billion)%20in%20foreign%20online%20shops.)

<sup>18</sup> Swiss Consumers perceive digital as a valuable channel for their food and grocery purchases (2020), <https://www.netcommsuisse.ch/insights/Swiss-Consumers-perceive-digital-as-a-valuable-channel-for-their-food-and-grocery-purchases.html>

of their highly preserved and living traditions and local customs. The Swiss Alps played an important role in the creation of these.<sup>19</sup> Cultural differences shape and influence the consumer behaviour of Swiss consumers, which makes culture and language important aspects to consider.

- **The ageing populace and continuous migration.** On the one hand, the current Swiss population is starting to age due to high life expectancies and a low fertility rate. The number of people aged 65+ years is forecast to increase by over 40% between 2022 and 2040. This means the wants and needs of older consumers are becoming more important. On the other hand, people continue to migrate to Switzerland and thus combat the ageing population trend. Most people that migrate are from the younger generations. Their needs will become increasingly important as well.
- **Urbanisation and geography.** Switzerland is quite an urbanised country as around three fourth of the population is living in cities. Between 2022 and 2040 the number of people living in urban areas is forecast to further grow up to a total of 78%. Nevertheless, this percentage is lower than the Western European average which is an urbanisation rate of around 84%. In many cases, lower urbanisation equals less access to education and services, this is not the case in Switzerland as the country is a highly advanced economy and has excellent infrastructure. Thus, even if more people decide to move to the countryside, it would be unlikely to hinder social progress in the country. Zürich is the most populated canton in the country followed by the Bern canton and the canton of Vaud. Most large settlements are located in the central plain because the Swiss Alp region offers less suitable terrain for larger settlements.

Against the considerations set out above, notable overarching consumer types in Switzerland 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 somewhat limited:

- **The wholesome consumer:** Switzerland is known to be one of the most environmentally friendly countries worldwide and around 4/5<sup>th</sup> of the population agrees that sustainability concerns influence their eating patterns to one degree or another (compared to 3/5<sup>th</sup> of the EU population). Thus, many consumers in Switzerland aim to take wholesome purchasing decisions, giving importance to the environment, and sustainability issues, but also to product origins and equality. Wholesome consumption is particularly gaining importance for younger consumers; however, its popularity is also increasing with older generations. Nearly half of the Swiss population would be willing to switch out meat with other alternatives in the future. In particular, when it comes to fresh produce, the origin is important to wholesome consumers, which is why they might prefer local products or at least products that have not been imported from far away. Wholesome consumers are likely to choose organic products over regular ones as they highly value their health. The main organic sales segments in Switzerland currently are eggs, fresh bread, fruit and vegetables. Moreover, the wholesome consumer does not care much about brands, but rather looks for value for money items. Social status is not important to wholesome consumers. Around 1/5<sup>th</sup> of the Swiss, in particular from the Italian-speaking side of the country aim to consume less in general to protect the environment. As it currently seems

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<sup>19</sup> Cultural life (2022), <https://switzerland-tour.com/information/cultural-life#:~:text=The%20Swiss%20culture%20is%20distinguished,dialects%20spoken%20in%20every%20region.>

to be easier for consumers to identify the sustainability or ethical aspects of a product in actual shops rather than online, many wholesome consumers like to go shopping in person. The demand for more transparency surrounding issues such as CO2 emissions, child labour, pay inequalities, safety, waste disposal, biodiversity, deforestation and supply chains.

- **The e-commerce enthusiast:** Digitalisation shaped consumer behaviours in Switzerland, in particular one of the e-commerce enthusiasts. Switzerland is a highly connected country and is likely to reach near-universal internet use by 2026. An increasing number of Swiss consumers shop online due to the wide offer and its convenience. Most e-commerce enthusiasts are younger, however, since COVID-19, the number of older consumers who switched to online purchases has been increasing as well. Online food and grocery shopping are one of the segments that are likely to increase by a lot in the coming years, partly due to the e-commerce enthusiast. Around 50% of the population makes a minimum of one online purchase per month. More than 4/5<sup>th</sup> of Swiss consumers research products online before taking a purchase decision even if they decide to go to a store to purchase an item. Digital payment systems continue to gain popularity as well.<sup>20</sup>
- **The luxury spender:** The Swiss population is very wealthy, and the unemployment rate is lower than in many other countries. Luxury spenders are usually wealthy and do not have to worry much about money. Due to increased life expectancy and better healthcare, the Swiss population is getting older. Thus, many luxurious spenders are late lifers that are older than 65 years because they had a lot of time to save money and want to spoil themselves as they retire. As a result, older consumers have a strong influence on premium spending patterns in Switzerland, which include premium food items or health and wellness goods. Luxurious spenders often pay attention to their image and enjoy purchasing branded items. Even though many of these spenders are from the older generations, younger consumers with higher incomes also belong to this consumer group. Younger luxury spenders want to stay up-to-date with trends, which is why they do not mind spending more money on luxurious products if they fit their trendy lifestyle. They will pay attention to different aspects of a brand or product such as quality, status, value, etc.<sup>21</sup>

### 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 Swiss market. Those listed below are the ones which stand out as particularly important for exporters of food and beverage products.

#### Ethnicity and religion

As Switzerland's four national languages suggest, the country is very diverse. In terms of religion, Switzerland is a mainly Christian country, with Catholics (around 35%) being the largest group, followed by Protestants (about 25%). Besides the cantons of Neuchâtel and Geneva, all other cantons have state-recognised religions, which include the aforementioned ones. However, the country's religious landscape has changed a lot during the last few decades as the number of Swiss without any religious affiliation continues to go up and other different faiths spread. Around 25% of the Swiss have no religious affiliation today, whereas this number was only around 1% in

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<sup>20</sup> 43% of Swiss want to shop less after corona (2021), <https://ecommercenews.eu/43-of-swiss-want-to-shop-less-after-corona/>

<sup>21</sup> Consumer behaviour and Consumption, <https://en.wideagency.com/articles/consumer-behaviour-and-consumption>

1970. Approximately 5% of the population are Muslim; most of which came from the Balkans or Turkey and predominately live in cities now. Other Christian denominations account for about 6% of the population and around 0.2% of people are Jewish. Jewish communities are mainly situated in Geneva and Zürich. The freedom of religion is an important part of Swiss culture and it is protected in the country's constitution.<sup>22</sup>

Ethnicity affects people's consumption habits. Swiss Germans are likely to consume more German-style food, whereas the Swiss-French probably is closer to French cuisine. Religion influences consumption patterns as well. Muslims for example do not consume pork products or alcoholic drinks. However, as the majority of Switzerland is either Catholic, Protestant or unaffiliated not many people have food restrictions due to their beliefs.

### Gift giving

There are numerous gift-giving occasions in Switzerland, many of which are similar to traditions in EU countries.

The most popular holiday for gift-giving in Switzerland is Christmas. Usually, families gather during the holidays to celebrate with traditional meals together. St. Nicholas Day, which is before Christmas marks a day on which mainly children are given little gifts such as chocolates and other treats. Swiss people count the days until Christmas with advent calendars. There are a lot of different advent calendars, but many include a little chocolate treat each day. It is common to purchase a calendar for a loved one (in particular for kids as they cannot wait for Christmas to arrive).<sup>23</sup>

Valentine's Day is another occasion to give gifts such as flowers or chocolates to loved ones. Even though this day is not as popular in Switzerland as in other countries it is still celebrated by some. During Easter, chocolate easter eggs are hidden for kids to find in the garden and families typically gather for grand meals.

Other gift-giving occasions include weddings, birthdays, bereavements, baby and bridal showers, anniversaries, etc. Premium alcoholic beverages such as wine as well as high-quality chocolate boxes or assortments are appropriate gifts for most occasions.

### Swiss cuisine and its most popular dishes

Switzerland with its four official languages and 26 cantons offers a variety of different traditional food. Swiss cuisine has been influenced mainly by its neighbouring countries France, Germany and Italy (mainly the north). As such, most traditional dishes are rather simple but hearty. They are often made from only a few ingredients such as Swiss cheese, meat and potatoes. Cooking with alcohol, in particular wine, is common. Many regional specialities exist that mirror the broad cultural diversity of Switzerland.<sup>24</sup>

The number one Swiss dish by far is *Fondue*. This melted cheese dish is served in large communal pots that are kept hot over a candle or other source of heat. Bread is used to dip the cheese. The fondue itself is often a mix of cheese and wine and some spices such as garlic.

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<sup>22</sup> Religion – facts and figures (2020), <https://www.eda.admin.ch/aboutswitzerland/en/home/gesellschaft/religionen/religionen---fakten-und-zahlen.html#:~:text=37%25%20of%20the%20Swiss%20population,the%20two%20main%20Christian%20churches>.

<sup>23</sup> Switzerland Gift Giving Customs, [http://www.giftypedia.com/Switzerland\\_Gift\\_Giving\\_Customs](http://www.giftypedia.com/Switzerland_Gift_Giving_Customs)

<sup>24</sup> Swiss Cuisine: Traditional Food You Need to Try, <https://studyinginswitzerland.com/swiss-cuisine-traditional-food-to-try/>

Other popular dishes include *tarts* and *quiches*, *Landjäger* (a semi-dried snack sausage), *Raclette*, *Tartiflette* (combination of potatoes, bacon, caramelised onions and Reblochon cheese), *Älplermagronen* (also known as the Alpine macaroni), *Rösti* (fritter style potatoes) and *Zürcher Geschnetzeltes* (veal and mushrooms on a cream sauce).<sup>25</sup>

## Festivals and holidays

Most holidays in Switzerland are celebrated throughout the country, however, some of them are celebrated only in specific cantons of Switzerland. As a result, not all cantons in Switzerland celebrate the same national public holidays.

Most existing national holidays are religious and have a long-standing tradition. These holidays are mainly celebrated in the catholic cantons. National holidays are an integral part of Swiss culture, which is why most shops and public institutions are closed during festivities.

The holidays and festivals mentioned below are the ones that are celebrated in most cantons. The list also includes important other festivities and carnivals in Switzerland.<sup>26</sup>

- **New Year's Day** (1<sup>st</sup> January). New year's celebrations have a long tradition in Switzerland. Celebrations differ in different regions. According to old Swiss beliefs, the New Year's Holiday is there to cast off all evil spirits and demons to have a fresh start into the new year. In Lausanne, the cathedral lighting is the main event on New Year's, whereas there is a large bonfire in Hallwil. In many towns and villages, parades take place with costumes, masks and music. A lot of food and usually alcoholic drinks are consumed together with friends and family
- **Swiss carnivals** (February). In February nearly the whole country celebrates the Carnival. Carnival is called *Fasnacht* in Switzerland, which is viewed to be a time of slightly chaotic fun. Many traditions surround these festivities that range from old Germanic mystical sacrificial practices to a festival that aims to get rid of bad spirits. During carnival people usually drink a lot of alcohol and eat a lot of food.
- **Valentine's Day** (14<sup>th</sup> February). Like in other areas of the world, Valentine's Day celebrates love. Even though not everyone in Switzerland is celebrating this day, couples that do like to give each other little presents to show their appreciation for each other. Chocolate is a common gift.<sup>27</sup>
- **Easter** (moveable holiday between 22<sup>nd</sup> March and 25<sup>th</sup> April). Easter is the most important holiday for a Christian. Easter Sunday is not a public holiday as it always falls on a Sunday. Good Fridays on the other hand are public holidays and most shops are not open during these days. Easter Monday is a public holiday in some of the Swiss cantons. Easter is also celebrated by people without any religious affiliation as the beginning of spring. In Switzerland, the Cuckoo (bird) brings Easter eggs, special easter cakes and chocolate cuckoos for the kids and hides them. People usually share wine and grand meals with their families. An easter egg hunt typically takes place on Easter Sunday.
- **Ascension Day** (40 days after Easter). This is a primarily Christian holiday as well. This day is a national holiday celebrated throughout the whole country. According to an old tradition, if the weather is bad on this day, the harvest of the year will be bad too.

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<sup>25</sup>Top 10 foods to try in Switzerland, <https://www.bbcgoodfood.com/howto/guide/top-10-foods-try-switzerland>

<sup>26</sup> 8 Holidays In Switzerland + Carnivals You Want To See, <https://alphazug.com/8-holidays-in-switzerland-carnivals-you-want-to-see/>

<sup>27</sup> How Do Swiss Celebrate Valentine's Day?, <http://swiss7.com/how-do-swiss-celebrate-valentines-day/>

- **Swiss National Day** (1<sup>st</sup> August). This is one of the most important national holidays as it is the only official federal holiday. Every year Swiss celebrate the establishment of the Swiss Confederation in 1291. The celebrations include public speeches, concerts and firework displays. It is common for people to start the day with a large breakfast to have enough energy for the festivities.
- **Onion market in Bern “Zibelemärit”** (fourth Monday of November). This is one of the most famous festivals in Switzerland. The traditional folk festival celebrates onions in all forms. They are presented in onion braid form and onion garlands as well as figures. All different kinds of onions are for sale as well as traditional dishes that are made with onions such as onion tarts, and onion soups.
- **Advent** (four Sundays before Christmas). Advent time is the waiting period before the Christmas celebrations. Advent calendars are a typical way to count down time. Each day they include a little treat, such as chocolate or another little present to make the waiting feel nicer. This tradition is particularly loved by children. Christmas markets are often open during Advent as well, where people go to enjoy mulled wine. Some families gather on Advent Sundays to eat together.
- **Saint-Nicolas Day** (6<sup>th</sup> December). In German-speaking Switzerland, Saint Nicholas visits homes and schools to bring little presents to main kids such as sweets, fruits and nuts. To get a present it is common for children to have to say a poem and to promise that they will be good in the year to come.
- **Christmas Day** (25<sup>th</sup> December, Sunday). Christmas is another important holiday in Switzerland. Nearly all Swiss families celebrate Christmas, even though the festival is of Christian origins. As it is a Christian holiday, the *Christkind* in German or *Le petit Jésus* in French brings the presents; though Santa Clause is very well known as well and non-Christian families might refer to him instead. Furthermore, Christmas is a day when families gather to have large meals together.

Switzerland is a melting pot of people from different origins and cultures, which is why there are a lot of different customs and traditions all over the country. However, the largest two most universally celebrated holidays are Christmas and Easter. Even though the number of atheists is growing, these traditions remain.

### Important cultural symbols

Switzerland's rich culture and uniqueness are represented by the different official and unofficial symbols of the country. The Swiss flag and the coat of arms are examples of official symbols. In addition to these, the country also has many unofficial symbols, which are cultural icons representing the nation. As Switzerland is culturally diverse there are also some regional symbols that are not included in the following list.

### National Flag and Coat of Arms

The current national flag was introduced in 1848. The flag shows a white cross on a red background. Historians believe that the flag originates in the 14<sup>th</sup> century when the battle of Laupen took place as a white cross along a red banner was used to identify their own troops during the war. Switzerland is a highly neutral country; it officially established its neutrality in 1815 and has maintained this status since. As a result, the



Swiss flag has become a sign of peace in recent times. The flag stands for the freedom, loyalty and honour of the Swiss people.<sup>28</sup>

The National Coat of Arms is very similar to the flag, just in form of a triangular shield. The coat of arms has been used since the beginning of the 20<sup>th</sup> century, but the current official one has been established in 1889.

### National Flower



The Edelweiss flower (*Leontopodium nivale*) is viewed to be the national flower of Switzerland. The flower can be found in the mountains and thus is adapted to mountainous conditions. Due to its association with the world-renowned Swiss Alps, it became a national symbol of the country. The Edelweiss flower is known under many different names such as *Wollblume* (wool flower), *Klein Löwenfuss* (small lion's foot), *étoile du glacier* (star of the glacier), *étoile d'argent* (silver star), and *immortelle des Alpes* (everlasting flower of the Alps). It is used as a symbol for many souvenirs.<sup>29</sup>

### National Tree

Even though there is no official national tree, the pine tree is very often associated with Switzerland. *Pinus cembra* is a pine tree variety that grows in the Swiss Alps as well as in other Swiss regions. As it can endure a range of different temperatures it is well suited for Switzerland's diverse terrains.



### National Animal



Like it is the case for trees, there is no official national animal in Switzerland. However, different species are often associated with the country.

Cows are very present in many areas of the country and thus a common view. They can be found in valleys as well as high up in the mountains. They are particularly important for the country as they produce dairy which is used for the production of Switzerland's famous chocolates and cheeses.

In the autumn cow parades take place in some regions to praise the animals. Around 350 000 animals in total come down from the Alps for the winter and are decorated with bells and floral crowns.

The St. Bernard dog is a Swiss symbol as well; it is an official Swiss breed of dog and is often associated with the country. They are commonly used in Swiss mountain areas (e.g. in ski resorts) during the winter as they are good at finding people buried in snow. The breed symbolises devotion, sacrifice and dignity.

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<sup>28</sup> Flags, Symbols & Currency Of Switzerland, <https://www.worldatlas.com/flags/switzerland>

<sup>29</sup> Swiss National Symbols: What Do They Represent? (2021), <https://studyinginswitzerland.com/swiss-national-symbols/>

Turacos are the national bird of Switzerland. They are not found in many areas of the world, but in Switzerland and southern Africa. It is a medium-sized bird that has purple, green and blue feather pigments.

### National Instrument

The national instrument of Switzerland is the Alphorn, which is 3.5m long. Its shape is conical, and the end is shaped like a cow's horn. It is likely to date back to the 16<sup>th</sup> century and has been used for more than 600 years by shepherds to call their cow herds to the stables, as well as for entertaining people.



### Swiss cheese



Swiss cheese is iconic and cheese making is a form of art, which makes cheese a cultural symbol of Switzerland. The Swiss take a lot of pride in their cheeses, many of which are still made locally and are exceptional craftsmanship. In total there are about 450 varieties of cheese produced in the country. Around 50% of the produced milk in Switzerland goes into cheese making. The top Swiss cheese is Le Gruyère, however, Emmentaler cheese is the most exported Swiss cheese. Both of these cheeses are produced in the Alps.<sup>30</sup>

The Swiss national dish is Fondue, which is a molten cheese mixture that often also includes wine and alcohol.

### Rivella

Even though there is no official national drink of Switzerland it would be Rivella if there was one. The drink was introduced in 1954 and immediately gained popularity amongst the Swiss. One reason for its popularity is its strange recipe that has remained the same until today. Rivella includes milk whey, a very unusual ingredient for a carbonised drink, which gives it its very unique flavour profile. Every single person in Switzerland knows Rivella; some love it and some hate it.<sup>31</sup>

### Stereotypes

There are a variety of widely assumed stereotypes about Switzerland. Notable ones relevant to food and agriculture are:

- **Swiss eat fondue all year round.** Cheese is highly popular in Switzerland, considering the country produces over 450 varieties of it. Emmentaler cheese is probably one of the most popular ones with its famous holes that people think often of when picturing Swiss cheese. However, the Swiss do not eat fondue all the time. Even though some might eat it during the summer, the fondue season takes place during the cold winter month when people particularly enjoy hot melted cheese. Furthermore, considering the high number of

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<sup>30</sup> Cheese is part of the Swiss culture (2021), <https://lettersfromemsia.com/food-is-part-of-culture/>

<sup>31</sup> Why Rivella Red is the quintessential Swiss soft drink, <https://swissmade.direct/blog/why-rivella-red-is-the-quintessential-swiss-soft-drink/>

calories that are in fondue Switzerland's obesity rate would be much higher if people would consume fondue very regularly.<sup>32</sup>

- **Swiss consumers are addicted to chocolate.** Swiss consumers indeed consume a lot of chocolate. The per capita consumption is around 12 kg per year, which makes Switzerland the number one chocolate-consuming country in the world. However, the Swiss are not addicted to chocolate. Their affinity for chocolate might be due to the large number of internationally recognised companies that produce high-quality chocolate in Switzerland and also elsewhere in the world such as Lindt chocolate.<sup>33</sup>
- **The Swiss are close to their cows.** As many Swiss people live in urban areas and not in the countryside, this is not true. However, considering there is about one cow for every 5 people in Switzerland, dairy production plays an important role. This becomes clear when looking at the production numbers of Swiss cheese and chocolate; and is reflected by the country's self-sufficiency in dairy.<sup>34</sup>
- **The Swiss are all rich.** Indeed, the Swiss generally earn more money compared to people from EU countries. Swiss people have a high standard of living. Nevertheless, a high standard of living which comes with a clean environment, good governmental services, excellent medical services and high-class universities also comes with a higher price tag. Thus, grocery shopping in Switzerland for example is considerably more expensive than in EU countries. This means the average Swiss person is not necessarily rich.<sup>35</sup>

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<sup>32</sup> Top 10 clichés about Switzerland, <https://houseofswitzerland.org/headlines/top-10-cliches-about-switzerland>

<sup>33</sup> 11 Stereotypes Every Swiss Person Hates, <https://theculturetrip.com/europe/switzerland/articles/11-stereotypes-every-swiss-person-hates/>

<sup>34</sup>Top 5 Stereotypes about Swiss People and Culture in Europe, <https://www.europelanguagecafe.com/stereotypes-aboutswiss-people-culture-europe/amp/>

<sup>35</sup> 7 Stereotypes About Switzerland That Are True, <https://medium.com/top-hat/7-stereotypes-about-switzerland-that-are-true-961e6aebbf95>

## 4 Market access and entry

This section provides details on the necessary requirements for entry into the Swiss 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 (-)
<ul style="list-style-type: none"> <li>▪ Geographically close market, with the added bonus that Switzerland is almost entirely surrounded by EU member states with a large agri-food production base.</li> <li>▪ The small size of the country coupled with a heavily urbanised market creates a clear consumer base for EU producers to target.</li> <li>▪ The high value of the Swiss Franc makes EU agri-food products price-competitive in the Swiss market.</li> <li>▪ The country has a fundamental large structural deficit in agri-food products.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Swiss consumers have been shown to prefer Swiss-produced products for certain larger categories (meat and dairy) which limits demand for EU products within these categories.</li> <li>▪ The duopoly nature of the Swiss retail market with COOP and Migros being by far the two largest retailers in the country limits the ability to partner with multiple retailers in Switzerland.</li> <li>▪ Swiss consumers hold domestic products in high regard concerning production standards, this limits the ability of EU agri-food goods to leverage their luxury traits in Switzerland when compared to other third countries.</li> <li>▪ Not all agri-food products are fully liberalised.</li> </ul>
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> <li>▪ Catering to similar culinary practises coupled with the protection of EU GI products creates an easier market to penetrate when comparing other third countries. Indeed, the GI status of products may help imported products be better seen by Swiss consumers and hence may help tackle the inherent preference for Swiss products.</li> <li>▪ High volumes of cross-border commuters and immigrants from large EU members (<i>France, Germany, Italy, Austria</i>) help to drive demand for EU agri-food products in Switzerland.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Switzerland is a party to several free trade agreements with large agri-food producers such as China, Turkey and Canada.</li> <li>▪ The Swiss farming union is strong and readily protests the move to increase imports of products such as dairy and meat into Switzerland.</li> <li>▪ Switzerland is home to large domestically based multinational companies which operate in the food and beverage sector such as Nestlé and Emmi which are well established in the country.</li> <li>▪ While Swiss-EU relations are and have always been generally good, there is a degree of uncertainty – most notably due to a combination of the complex web of</li> </ul>

<ul style="list-style-type: none"> <li>▪ High-value economy allows for a wider amount of consumers to afford and purchase premium EU products on a more regular basis.</li> <li>▪ Switzerland is likely to need a higher level of agri-food imports in the future due to a combination of growing demand and declining agricultural output in many sectors.</li> </ul>	bilateral agreements and the Swiss referendum system. This uncertainty could ultimately impact food and beverage products in the future.
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## 4.2 Food and beverage legislation and regulations

The food regulation landscape in Switzerland is set out at the federal level via the Swiss Food Act which sets out the regulations in place regarding food and beverages in Switzerland. The federal state is responsible for the food control at the borders of the state while the cantons have devolved powers to implement the food act as they see fit which extends to implementing food controls within the canton and administrative controls. Although Switzerland is not a member of the European Union, it has a free trade agreement with the block and Switzerland has amended its laws and ordinances on foodstuffs to harmonise its food legislation to a greater degree with its EU neighbours to ensure continued access to the EU single market, in turn facilitating the movement of agricultural products. Some of the more key aspects of the EU-Switzerland bilateral trade agreement concerning agriculture include:

- Mutual tariff concessions for products that are of particular interest to Switzerland and the EU, these include fruits, meat speciality products and horticultural products.
- Aims to simplify trade in the agricultural sector via the reduction or elimination of non-tariff-based trade barriers. Included within this context are certain technical regulations in the areas of plant health, animal feed, seeds, organic farming, wine and spirits as well as quality norms for fruit and vegetables are mutually recognized as being equivalent by both the EU and Switzerland.
- The designations for wine and spirits are mutually protected; the protection of Swiss designations normally limited to Swiss territory is thus extended to the wider EU single market.
- An agreement on the mutual recognition of the protected designation of origin (PDO) and protected geographical indications (PGI).

The agreement is also enforced in the microstate of Liechtenstein which is a part of the wider Swiss customs union.

### 4.2.1 Import requirements/restrictions, customs procedures and documentation

The general documentation requirements for shipments to Switzerland 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 either French, German or Italian. Of course, Switzerland is not

a member of the European Union, however, the country implements the same rules regarding the general requirements for agricultural goods exported to the EU.

It should be noted that not all agri-food products are liberalised. Consequently, some products from the EU imported into Switzerland are subject to tariffs (most notably livestock products and fruit/vegetables); though tariff rate quotas generally exist.

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

Name	Description	To be prepared by	Language
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)	One of FR, DE, IT or EN
Bill of Lading	A document containing the details of the international transportation of products by sea.	Carrier (or his agent)	EN
Rail Waybill <i>Bahnfrachtbrief</i>	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
Customs Import Declaration	Official form for the customs clearance of goods. It also contains all the information required for the assessment of the dutiable value of a shipment.	Importer	DE, FR or IT
Railway Manifest	A document notifying the authorities of the arrival of a railway train and consignment, and summarising the goods loaded therein. It is mandatory and does not depend upon the specific purpose of arrival.	Freight forwarder (or his agent)	EN or IT, DE, FR
Goods Identification Card	A document containing the particulars necessary for the identification of goods brought into the customs territory.	Importer	DE, FR or EN
Commercial Invoice; pro forma invoice	A document containing the details of the transaction. There are requirements on minimum content for customs clearance though these are fairly standard invoice requirements. A Pro forma invoice generally contains the same information as a commercial invoice, though may be more precise. May be required for deliveries which are free of charge.	Exporter	Any language but the translation to EN, DE, IT or FR is normally needed.
Packing List	A document containing the details of the shipment and serving as a basis for the treatment of goods by customs.	Exporter	EN, IT, FR or DE
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	EN, FR, IT or DE

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	Confectionery	Pasta	Live Plants	Processed F&V	Biscuits / cereal bars	Baked goods
<b>Marketing authorisation for foodstuffs under Cassie De Dijon's principal.</b> A document authorising the marketing of foodstuffs under the Cassis de Dijon principle.	X	X	X	X	X	X	X	X	X	X	X
<b>Registration with the European Trade Control and Expert System (TRACES)</b> 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					?	?		
<b>General import permit for grains, fodder and foodstuffs (<i>Only applies to certain products</i>)</b> A document proving that its bearer is authorised to import sugar, coffee, grains, edible oils and fats.*					X	X					
<b>Import permit for animal products that do not entirely satisfy the import conditions</b> A document permitting the actual importation of potentially pathogen-carrying raw animal products of EU or Norwegian origin which does not entirely satisfy the import conditions, i.e., are not eligible to be imported in conformity with the TRACES procedure.	X										

<b>Common health entry document for products</b> A document notifying the importation of animal and certain plant products of non-EU origin, certifying that the consignment has been inspected upon arrival and that the release of these goods onto the Swiss market is permitted.	?	?	?						?		
<b>Veterinary health certificate for animal products</b> 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								
<b>Commercial paper for Animal by-products</b> A document accompanying the transboundary movement of animal by-products of EU origin, which are not intended for human consumption.	X										
<b>Plant passport.</b> A document certifying that plants and plant products are free from quarantine pests.		?							X		
<b>Phytosanitary certificate.</b> Document confirming plants have been inspected and are free from quarantine pests.		?							X		
<b>Permit to market plants.</b> Confirms the holder is authorised to market plants and plant material requiring a plant passport.		?							X		

Source: Agra CEAS based on Access2Market

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

\* This is part of the system of mandatory stocking of certain foodstuffs under the National Economic Supply Act. It is managed by réservesuisse, see reservesuisse.ch for more details

Switzerland, Liechtenstein and the EU form a common phytosanitary area, within which plant material can, in principle, be freely traded (no systematic phytosanitary border controls). Under the bilateral Swiss-EU Agreement on Trade in Agricultural Products, the same regulations apply throughout this single market for trade in plant material and a plant passport is generally not required.

### 4.2.2 Food safety and other food certification requirements

Although the Swiss Confederation is not a member of the European Union (EU) and is not a party to the agreement of the European Economic Area (EEA), Switzerland has amended its laws and ordinances on foodstuffs to harmonise its food legislation to a greater degree with its EU neighbours. The bilateral agreement in place between Switzerland and the EU means food products which comply with EU legislation are very likely to be acceptable in Switzerland without the need to pivot production practises. Despite harmonisations, there are several considerations to take into account within the Swiss market such as:

- There is an obligation to indicate the country of production in Switzerland which exists for all foodstuffs. The indication of the origin of the primary ingredient is also mandatory. Where meat is used as a primary ingredient, the indication of origin will be mandatory according to the new rules if its amount is equal to or greater than 20% of the final product by weight
- A food or beverage product can be placed on the Swiss market provided it is safe and complies with general Swiss food provisions such as labelling, additives, and contaminants. Switzerland generally uses the same approach as the EU regarding these areas.
- Food flavourings have recently been considered as ingredients and are regulated by a specific ordinance which will be in line with Regulation (EU) 1334/2008.

The Swiss Food Act, the Regulation on Food and Commodities, and other pertinent regulations form the basis for the execution and implementation of food law. The Federation is responsible for food control at the border. The Cantons execute the food act and provide for food control within Switzerland as far as the federation is not responsible. As stated previously, despite not being a member of the EU, EU food laws and regulations largely influence the food regulations further implemented in Switzerland.

The main overarching piece of legislation impacting food and beverage products in Switzerland is the Swiss Food Act which forms the main basis of food safety regulations in Switzerland concerning the health of consumers from foodstuffs and protecting consumers from deception relating to foodstuffs. The implementation of this act is largely devolved to the canton level.

### 4.2.3 Labelling Requirements

While labelling requirements in Switzerland are very close to those in the EU, unlike within the European Union, Switzerland continues to require a certain number of details regarding the country of production and the origin of ingredients. Most notably the indication of the country of production is mandatory and it relates to the country where the food was completely manufactured or in which essential processing steps took place. An example of labelling information/requirements in Switzerland, provided by the Swiss government, is shown below.

Figure 4-1 - List of requirements for food labelling in Switzerland

<b>1</b> Vollmilchjoghurt mit Erdbeeren (3,8 % Fett im Milchanteil)	<div> <div>8</div> <div>Nährwerte</div> <table> <tr><td></td><td>100 g</td></tr> <tr><td>Energie</td><td>420 kJ (101 kcal)</td></tr> <tr><td>Fett</td><td>3,4 g</td></tr> <tr><td>davon gesättigte Fettsäuren</td><td>1,7 g</td></tr> <tr><td>Kohlenhydrate</td><td>14 g</td></tr> <tr><td>davon Zucker</td><td>14 g</td></tr> <tr><td>Ballaststoffe</td><td>0,5 g</td></tr> <tr><td>Eiweiss</td><td>3,5 g</td></tr> <tr><td>Salz</td><td>0,10 g</td></tr> </table> </div>		100 g	Energie	420 kJ (101 kcal)	Fett	3,4 g	davon gesättigte Fettsäuren	1,7 g	Kohlenhydrate	14 g	davon Zucker	14 g	Ballaststoffe	0,5 g	Eiweiss	3,5 g	Salz	0,10 g
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Eiweiss	3,5 g																		
Salz	0,10 g																		
<b>2</b> Zutaten: Joghurt (Milch, Milchproteine), Zucker 9,2 %, Erdbeere und Erdbeersaft aus Konzentrat 8 %, modifizierte Wachsmaisstärke, Randensaft, Aroma.																			
<b>11</b> Energiereduciert																			
<b>12</b> Calcium wird für die Erhaltung normaler Knochen benötigt																			
<b>10</b> Glutenfrei	<div> <div>9</div> <div>CH 2434</div> <div>StarMilk <b>5</b></div> <div>Milchverarbeitung</div> <div>CH-3000 Bern</div> <div>Hergestellt in der <b>6</b></div> <div>Schweiz</div> <div>Herkunft Milch: <b>7</b></div> <div>Deutschland</div> <div>Bei höchstens 5°C</div> <div>aufbewahren <b>4</b></div> <div>180 g</div> </div>																		
<b>3</b> Mindestens haltbar bis: 15.03.19																			

Source: Food label information, Swiss federal food safety and veterinary office, available (In German) at <https://www.blv.admin.ch/blv/de/home/lebensmittel-und-ernaehrung/lebensmittelsicherheit/naehrwertinformationen-und-kennzeichnung/lebensmitteletikette.html>

Key mandatory labelling requirements (generally in line with the EU) are:

- Product designation**, indicating which type of food is within the packaging.
- List of ingredients**, providing information about all ingredients contained in a food.
- Best-before / expiry date**. All foods must be dated, with exceptions such as fresh fruit and vegetables, vinegar or table salt. The standard way of dating foods is to use the best-before date – that is the date until which a foodstuff retains its specific properties under appropriate storage conditions; or the expiry date.
- Storage requirements**. Some foods, such as those that perish quickly, must be stored or used under special conditions; and these must be stated on the label.
- Name and address** of the company or person who manufactures, imports, packs, wraps, fills or distributes the food. This is usually the distributor for imported products.
- Origin**. The country of production. In the case of foodstuffs consisting of several ingredients, in addition to the country of production, additional information on the origin of the ingredients may be required in certain cases. More specifically, if an ingredient constitutes over 50% of a product (or over 20% in the case of meat), the origin must be indicated. For example: "Tomato sauce, list of ingredients: tomato concentrate (90%, origin of tomatoes: France), courgettes, carrots, onions, sea salt, basil, garlic". If the tomatoes in the sauce came not only from France but also from Spain, both countries would have to be listed.

7. **Weight or volume**, using metric measurements.
8. **Nutritional value declaration** provides information about several nutrients contained in a product. It is generally mandatory, but there are individual food categories that are exempt. In principle, nutritional labelling of pre-packaged foods is mandatory with two types of markings being possible, these being:
  - Large nutritional value declaration: information on energy value, fat content, saturated fatty acids, carbohydrates, sugar, protein and salt.
  - Small nutritional value label: indication of energy value, fat content, carbohydrates, protein and salt.
9. An **identity mark** is mandatory for certain foods of animal origin, the identifier consists of a sequence of letters and numbers. It refers to the facility where the food was last processed or packaged.
10. **Voluntary disclosures:** Information such as "vegan" or "gluten-free" on the label is voluntary for the manufacturer.
11. **Nutritional information:** Nutritional information such as "reduced energy" can only be displayed if certain conditions are met

Information on labels must be provided in at least one of the three national languages (German, French or Italian). As a general rule, if only one language is being put on the label, it is best to choose the language which corresponds to the region where the product will sell the greatest volume.

Health claims may only be used if certain standards are met relating to the health claim in question.

CE marking is not mandatory in Switzerland but products bearing the CE mark are allowed on the Swiss market.

There are specific requirements for **alcohol labelling**. These vary by alcohol type, but a summary is presented in Table 4-3 below.

**Table 4-3: Alcohol labelling requirements by alcohol type**

	Beer (with alcohol)	Wine	Spirits
Name and address of the producer		X (plus bottling facility)	
Value of alcohol %	X		
Min % ethyl alcohol by volume		X	X
Bottling date	X	X	X
Country of origin		X	
Mass concentration of sugars		X	X (if sugar in formulation)
Type	X		
Nutritional information	X	X	
Storage information	X		
Expiration date	X		
Classification based on sugar content		X	
Year of harvest		X	
Geographical Indication	X	X	X

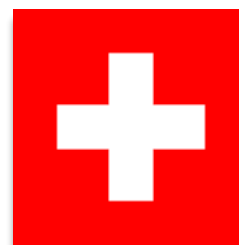
## Other labelling provisions including organic

In addition to the mandatory requirements, a variety of voluntary labels may be found on products in Switzerland. Bio Suisse is the Swiss **organic** market's most prevalent private label and the owner of the registered trademark Bud. The standards adhered to by Bio Suisse are private law guidelines and exceed the minimum legal requirements in essential respects (EU-Eco-Regulation 834/2007 or equivalent). The Bio Suisse label can be commonly seen on products in the largest retailers Migros and Co-op; though some other retailers such as Aldi have pursued their own organic label which follow the Bio Suisse standards<sup>36</sup>. There is organic labelling equivalence recognition between products from the EU being sent to Switzerland and vice-versa; however with the labelling itself privatised, the equivalence covers the standards but does not extend to the label. The most commonly used organic label in Switzerland is BioSuisse. Generally, it is challenging for non-Swiss producers to be able to use the BioSuisse label as it tends to favour Swiss domestic agricultural products..



The Swiss Association of Integrated Producing Farmers (IP-SUISSE) aims to promote environmentally friendly and animal-friendly agriculture in Switzerland, i.e., integrated agriculture. Their members generally meet minimum animal welfare requirements and, depending on market conditions, can take part in individual productions following IP-Suisse label guidelines. Consumers associate this label with companies that advocate for animal welfare rights.

Many Swiss consumers seek out domestically produced products relating particularly to meats, chocolate and dairy products, many consumers will seek out an insignia of the nation's flag to indicate to them that the product in question is of Swiss origin. EU food and beverages should therefore avoid using any Swiss insignias on their product packaging or labelling.



Finally, some products have voluntarily adopted the use of the Nutri-score labelling system – most notably the larger retailers of Switzerland (Migros and COOP) which use the label on their private-label products. This is the same nutri-score system that is also implemented in EU member states such as Belgium, France and Germany. The label allows consumers to quickly compare the overall nutritional value of the food or beverage item they wish to purchase with A being the highest and generally most healthy rating and E being the lowest and

generally having the least nutritional value.

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

The Swiss federal institute of intellectual property (IGE/IPI) is responsible for the monitoring and implementation of intellectual property rights in Switzerland - <https://www.ige.ch/>.

<sup>36</sup> For Aldi's label, see <https://retourauxsources.aldi-suisse.ch/>

Under a bilateral agreement in 2011, Switzerland and the EU agreement to implement the protection of EU and Swiss GI products in each other's market the agreement further allows for the right of any producer established in the geographical area concerned and who agrees to follow the system of control, to benefit from the GI in question.

#### **Searching for intellectual property in Switzerland**

There is an online database of intellectual property in Switzerland. This can be found, in English, German French or Italian, at: <https://www.swissreg.ch/srclient/>

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 Swiss Federal Institute of Intellectual Property**

Stauffacherstrasse 65/59g

Bern, Switzerland

✉ [info@ipi.ch](mailto:info@ipi.ch)

## **4.3 International trade**

### **4.3.1 Switzerland and foreign trade**

Switzerland, despite being a relatively small country, punches far above its weight in international economics with the country being ranked as the 20<sup>th</sup> largest economy in the world by GDP. Switzerland is a large producer and exporter of high-value products which acts as an incentive for prospective trade partners to negotiate a trade agreement. It is important to note that Switzerland operates its own customs area with the microstate of Liechtenstein and the tiny German enclave of Busingen. The absolute majority of Switzerland's foreign trade agreements are signed via the economic trading bloc known as EFTA (European Free Trade Association). This is a regional trade organisation made up of four countries, those being Iceland, Liechtenstein, Norway and Switzerland. These four countries have decided against joining the EU and originally in its inception was made up of more members including the UK and the other Scandinavian states. It is important to note that unlike in the EU, member states of EFTA can negotiate their own trade agreements outside of the scope of the bloc as Switzerland has done with Japan, China and the UK. In Switzerland, although rare, it is possible for a potential trade agreement to be put to the public in order to get final public approval before enactment; this occurred in 2021 with a referendum taking place to decide if Switzerland (in this case with EFTA) should ratify a potential trade agreement with Indonesia.

### **4.3.2 Key trade agreements, present, and future**

Switzerland as both a member of EFTA and in its own right has a large number of trade agreements in place as the country seeks foreign markets for its high-end exports. Currently, the country has a total of 33 free trade agreements (including several with trade blocks).

The main agreements are listed in Table 4-4 below.

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

Partners	Type of agreement	Entry into force
EFTA inception <i>Norway, Iceland, Liechtenstein</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
Japan (a)	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
Montenegro	Free Trade Agreement	2012
GCC <i>Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, UAE</i>	Free Trade Agreement	2014
China (a)	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
UK (a)	Free Trade Agreement	2021
Turkey	Free Trade Agreement	Modernised in 2021
Indonesia	Free Trade Agreement	2021

Source: Agra CEAS based on various

(a) *Bilateral FTA outside of the scope of EFTA*

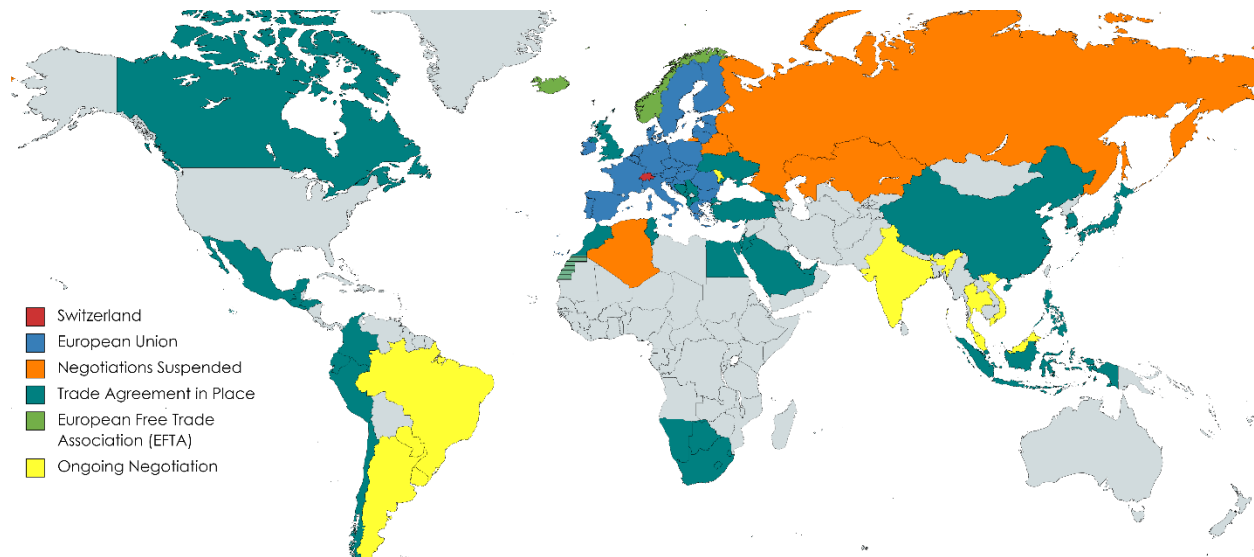
As a member of EFTA and bilaterally on its own, Switzerland continues to negotiate several potential free trade agreements with the largest ones currently being negotiated being

- EFTA-India FTA
- EFTA-Mercosur FTA
- EFTA-Vietnam FTA
- EFTA-Malaysia FTA
- EFTA- Thailand FTA
- EFTA-Moldova FTA

Additionally, EFTA has suspended several talks surrounding a potential free trade agreement due largely to political differences, the following potential FTAs negotiations remain suspended

- EFTA-Algeria FTA
- EFTA-EAEU FTA

**Figure 4-2: Overview of Switzerland's current and prospective trade agreements**



Source: Free Trade Agreements of Switzerland, The Government of Switzerland, Available at [https://www.seco.admin.ch/seco/en/home/Aussenwirtschaftspolitik\\_Wirtschaftliche\\_Zusammenarbeit](https://www.seco.admin.ch/seco/en/home/Aussenwirtschaftspolitik_Wirtschaftliche_Zusammenarbeit)

### 4.3.3 EU- Switzerland bilateral agreements concerning Switzerland's access to the EU single market.

Switzerland's economic arrangement with the EU is set via a number of bilateral agreements in which Switzerland has agreed to take over certain aspects of EU legislation in return for access to the EU single market. EU legislation that Switzerland has agreed to adhere to covers the areas of freedom of movement, technical trade barriers, public procurement, agriculture, air and land transport, research, processed agricultural goods, statistics and combating fraud. There are over 100 bilateral agreements in place between the EU and Switzerland which are managed by 20 joint committees. In return for its partial integration into the EU single market, Switzerland sends a financial contribution to the EU economic and social cohesion fund as every full member of the EU also does. Overall, the EU is Switzerland's largest trading partner for all goods and services

while Switzerland is the fourth larger trading partner for the EU. It should be noted that not all agri-food sectors are fully liberalised under the agreements, meaning that some products from the EU are subject to tariffs (most notably livestock products and fruit/vegetables); though tariff rate quotas generally exist.<sup>37</sup>

#### 4.3.4 WTO disputes and other trade barriers

As Switzerland has access to the EU single market, there are no major barriers or disputes currently in place between the EU and Switzerland regarding the movement of food and beverages specifically. There are several smaller disputes concerning internal Swiss taxation policies and the need for EU workers to declare that they will be carrying out temporary work in Switzerland 8 days ahead of the commencement of their work in certain Swiss cantons, although this again is not a major agriculture-specific issue.

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

[Access2Markets Barriers \(europa.eu\)](https://trade.ec.europa.eu/access-to-markets/barriers)

#### 4.3.5 Summary of key trade barriers

As discussed, there are no major barriers to trade between the EU and Switzerland at present regarding the trade of agricultural goods. Nonetheless, it should be noted that there are a number of measures which protect Swiss agri-food products and create challenges for exporters of all origins; these include both tariffs on some goods (sometimes substantial ones) as well as some non-tariff measures which create challenges for certain products (e.g. non-Swiss organic products). It remains unlikely that Switzerland will leave or try to renegotiate its access to the EU single market in the short term although the political structure of the country could in theory result in a referendum issues impacting single market access in the future if enough citizens petitioned for it. Switzerland however is landlocked between the EU (*with the small exception of the microstate of Liechtenstein*) providing a clear incentive for single market access. Many border cities also receive a large number of cross-border commuters further providing an incentive for Swiss voters to continue to support participation in the EU single market.

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<sup>37</sup> Switzerland, Access2Markets-DGTrade, Available at <https://trade.ec.europa.eu/access-to-markets/en/content/switzerland#:~:text=Switzerland's%20economic%20and%20trade%20relations,Free%20Trade%20Agreement%20of%201972.>

## 4.4 Operating in the Swiss food and beverage market

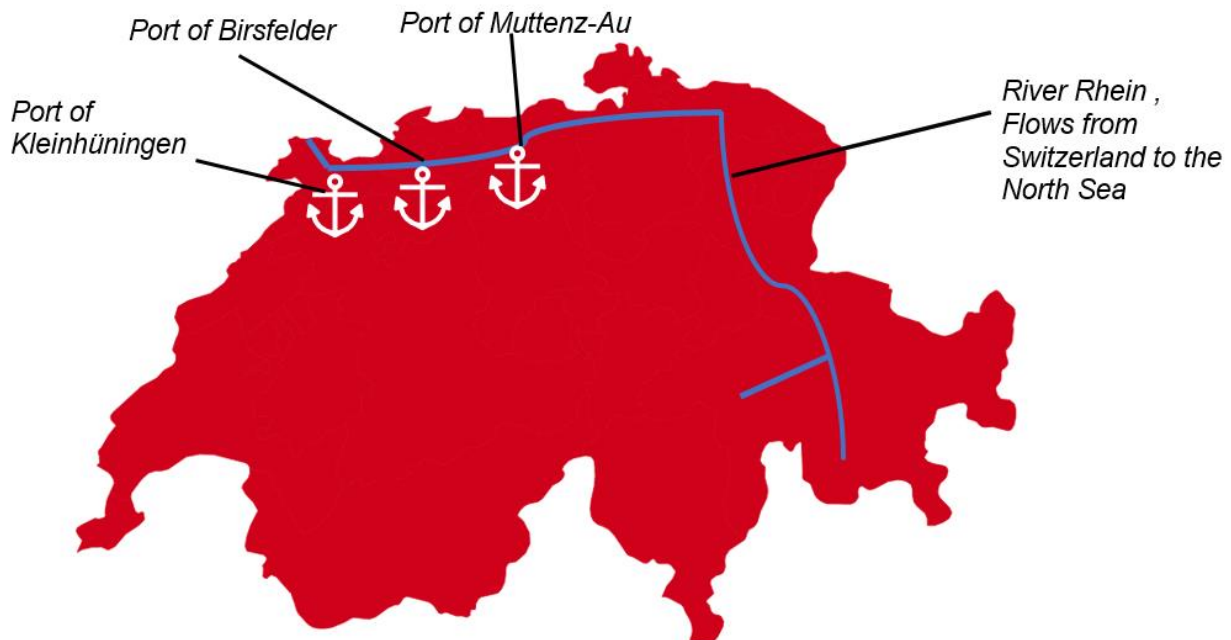
### 4.4.1 Logistical services and transportation infrastructure

Despite its mountainous geography, Switzerland has a well-integrated transportation infrastructure with the country often engaging in infrastructure projects that go straight through large mountain ranges. The country's population core is located within the central plain which in turn makes this region of the country the largest concentration of movement of both people and goods. Switzerland's proximity to France, Italy, Germany and Austria further makes this country a key crossroads within the wider trade of goods and services within Europe providing an additional incentive for the government and cantons to maintain a high-quality transportation system.

#### Shipping

While Switzerland is a landlocked country it has not deterred the country from utilising shipping as a means of freight movement; this is largely possible due to the presence of the river Rhein which flows from the mountains of Switzerland through Germany and finally through the Netherlands into the North Sea which effectively grants Switzerland indirect sea access. Some of the larger ports located in Switzerland along the river Rhein include the port of Birsfelden, the port of Muttenz-au and the port of Kleinhüningen. The Swiss Rhein ports handle roughly 6-7 million tonnes of goods on an annual basis accounting for 10-15% of all imports into Switzerland.<sup>38</sup>

**Figure 4-3: Major Ports in Switzerland**



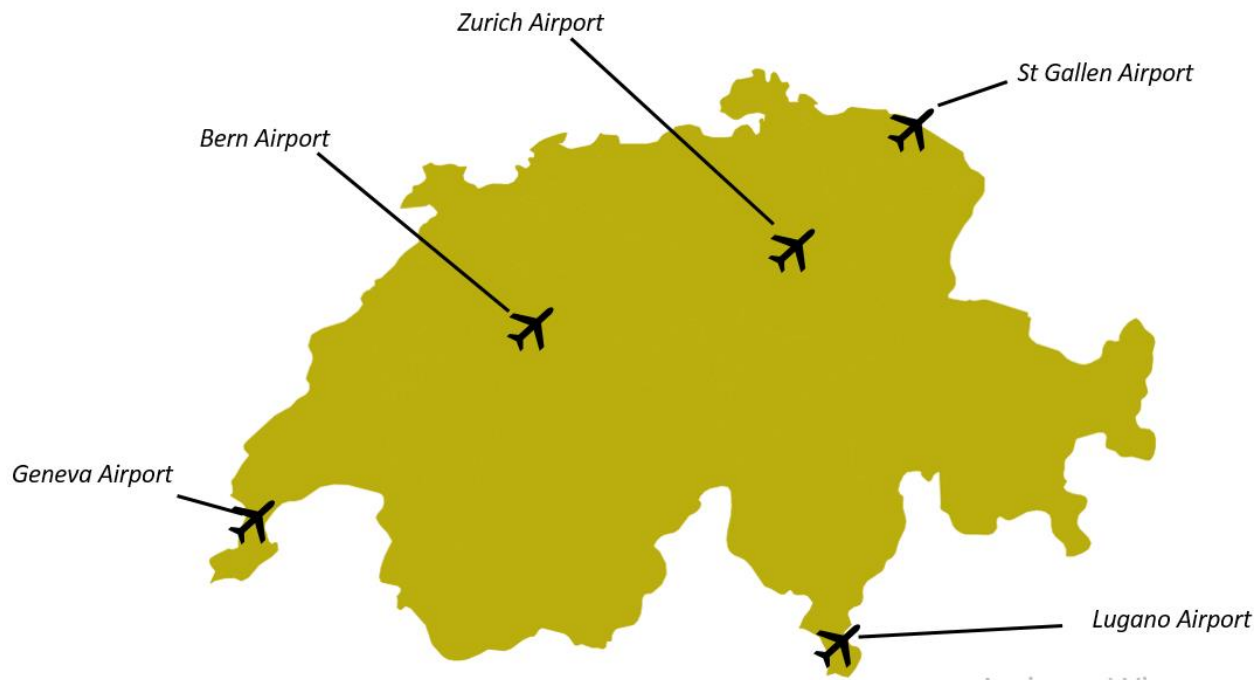
Source: Agra CEAS based on various

<sup>38</sup> Connecting citizens ports 21, Port of Switzerland, Available at <https://www.citizenports.eu/partners/port-of-switzerland/>

## Airfreight

As a country located in the centre of Europe, Switzerland is a large gateway hub for many airlines travelling across the continent. With regards to freight, in 2021 an estimated total of 842 million tonnes of cargo were moved by air in Switzerland. The country's largest airport is Zurich airport, followed by Geneva airport and Lugano airport. Outside of these airports, the rest of the country's airports are quite small with St Gallen airport and Bern airport being the only other airports with significant traffic.

**Figure 4-4: Major International Cargo Airports in Switzerland**



Source: Agra CEAS based on various

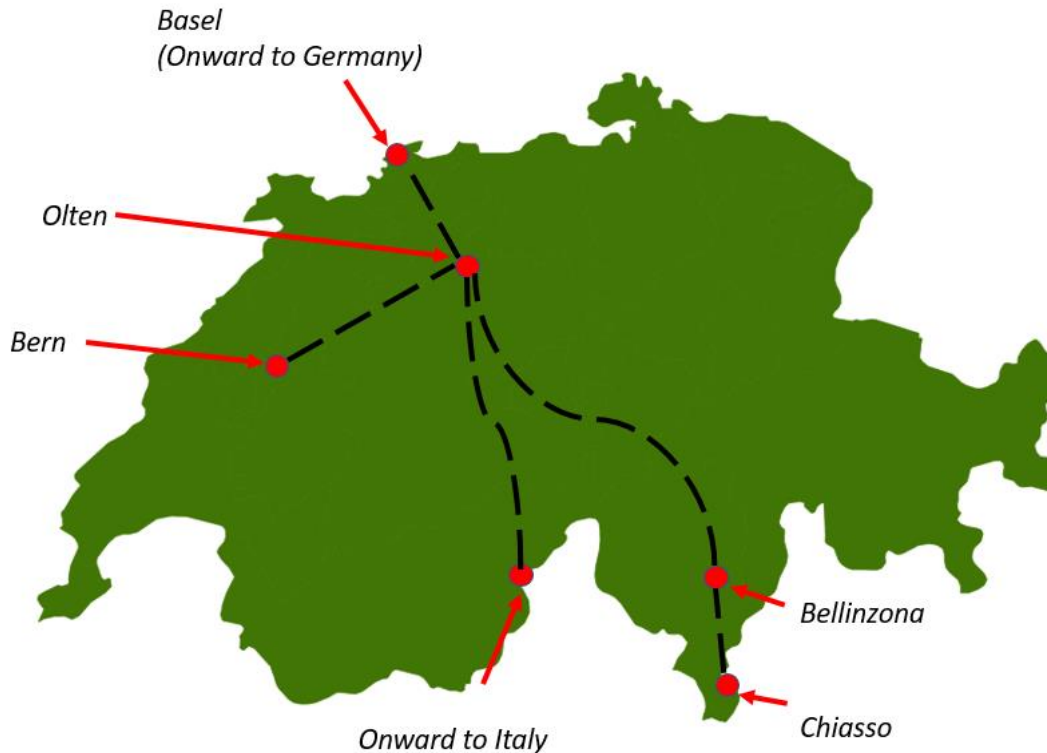
## Rail freight

With just over 5 000 km in network length, Switzerland has one of the densest developed railway networks in Europe. Despite the country's very mountainous geography, Switzerland's railway system connects cities from across the country. Switzerland has enacted a number of policies aiming to facilitate the movement of cargo in the country via rail with the most notable provision being the "alpine initiative" which enshrined in the federal constitution the need to prioritise rail traffic through the Swiss alps over other modes of traffic. Due to this, today roughly 75% of cargo that is moved through the Swiss alps is done via rail<sup>39</sup>. In relation to freight movement, the main freight company operating in Switzerland is the Swiss federal railways (SBB). Overall, 11 245 million tonne-kilometres of freight were transported throughout Switzerland in 2021 with metal

<sup>39</sup> Transfer of transalpine freight traffic from road to rail, Government of Switzerland, available at <https://www.bav.admin.ch/bav/en/home/modes-of-transport/railways/rail-freight-transport/transfer-from-road-to-rail.html>

and metal products, petroleum products and food accounting for the majority.<sup>40</sup> 558 000 tonnes of food were transported via rail in 2021 while other agricultural goods came to 128 000 tonnes. Germany accounted for the majority of rail freight arriving in Switzerland from abroad followed by Belgium and Italy.

**Figure 4-5 Major rail freight lines**



Source: Agra CEAS based on various

## Road Freight

Road freight is a final key component of cargo arriving and leaving Switzerland with the country being located at the cross-roads of three of Europe's largest economies, France, Italy and Germany. The Swiss motorway (*Autobahn*) is one of the densest in the world often criss-crossing between large mountain ranges in a bid to connect all of the country to the network. Two of the more important motorways in Switzerland include the A1 which runs from the north eastern canton of Saint Gallen to Chiasso which is located in the south of the country near the border of Italy; and the A2 which runs from Basel near the German border also to Chiasso near Italy. In 2020, around 63% of freight movement within Switzerland was carried out by the road with rail accounting for 37% although the figure for rail rises to 75% concerning transalpine freight movement specifically. This makes the densely populated Swiss central plain a key region for road freight movement.

<sup>40</sup> Goods transport by rail, Government of Switzerland, available at <https://www.bfs.admin.ch/bfs/en/home/statistics/mobility-transport/goods-transport/rail.html>

#### 4.4.2 Distribution – retail channel overview

For a small country, Switzerland ranks highly amongst consumer market retail value in Europe with a total retail market value of roughly EUR 115 billion which places it as the 9<sup>th</sup> most valuable retail market in Europe behind the Netherlands but ahead of Poland. The grocery retail market of Switzerland is highly developed but concentrated between two large domestic retailers, those being Migros and COOP which together account for roughly 70% of the Swiss food and beverage retail market. E-commerce is also growing quickly in Switzerland with the country being one of the top five European countries by the proportion of online sales in 2021.

##### ***Cross-Border Shopping***

As discussed throughout the handbook, the cost of food and beverages in Switzerland is high with prices being 42% more expensive in Switzerland than in neighbouring France, with this figure rising to 51% when comparing Germany to Switzerland. This coupled with the strong value of the Swiss CHF currency encourages consumers in the country to visit neighbouring EU countries such as Italy or Germany to do their food and beverage shopping. Switzerland in turn imposes a number of limits to halt the overflow of cheaper food and beverages into its domestic market, these limits include

- 1kg limit for duty free meat products
- 5 litre duty free limit on olive oil
- 5 litre duty free limit on alcoholic beverages up to 18% ABV
- 1 litre duty free limit on alcoholic beverages with an above ABV of 18%
- 1 kg duty free limit on butter and cream

The following products however can be brought into Switzerland duty free without limits

- Dairy products with the exception of butter and cream
  - Eggs
- Fruit and vegetables
- Cereal products
- Cut flowers

Source: Swiss customs regulations for alcohol, meat and tobacco, Comparis.ch, available at <https://en.comparis.ch/preisvergleich/info/recht-gesetz/freigrenzen-zoll-einfuhr-schweiz>

## Co-operatives

As mentioned above, Migros and COOP are by far the two largest retailers in Switzerland with the two companies enjoying a de-facto duopoly of the retail market which has only begun to weaken in recent years with the rise of foreign companies in the Swiss retail market. Nonetheless, still, these two co-ops account for 70% of the Swiss food and beverage retail market. Migros is the larger retailer with the company retaining its co-operative business structure. Around 2 million Swiss citizens are members of the co-operative, making Migros one of the larger retail companies that are owned by its customers in Europe. COOP is also operated under a co-operative business structure and has just under 2 million Swiss citizens who are members. The company also has been proactive in the sale of organic foods and now accounts for roughly half of all organic foods sold in Switzerland. In 2021, Migros had a total turnover of EUR 30 billion while COOP had a total turnover of EUR 20 billion (*retail sales only*). Migros operates 658 supermarkets in Switzerland while COOP operates 2 617 supermarkets and smaller retail outlets.<sup>41</sup> Denner is also another large chain in Switzerland and has been under the ownership of Migros since 2007.

## International retail outlets

As stated, while COOP and Migros have enjoyed a de-facto duopoly of food and beverage sales in Switzerland historically, the rise of international retail outlets has impacted their total market share in Switzerland. Notable foreign retail outlets with a significant presence in Switzerland include **Lidl** and **Aldi** which are known for being cheaper than traditional large food and beverage retailers in Switzerland. These outlets in particular will likely stock a wider variety of food and beverages from throughout the EU due to partnerships with producers and a tendency for Migros and COOP to favour domestic Swiss producers due to the co-operative business structure of their companies. Aldi has around 200 stores spread out across Switzerland while Lidl has a total of around 150 stores in the country.

## Convenience Stores

Small shops and convenience stores are located throughout Switzerland and are often the main distribution channel throughout smaller towns located across the country, particularly in underpopulated mountainous regions of the country - although in general Swiss citizens are rarely too far away from a larger retail outlet. One of the more notable foreign convenience stores in Switzerland is **Spar** which operates several smaller convenience stores across Switzerland and the company has around 200 stores in the country. **Volg** is another large convenience store chain in Switzerland and is commonly one of the only retail outlets found in smaller more rural areas of Switzerland.

## Food markets

Food markets are common in Switzerland with the bigger ones being found in the larger cities of Zurich, Geneva and Bern. The biggest and more well-known food markets in Switzerland are Geneva's *Carouge Market* and Zurich's *Helvetiaplatz Market* which are both open twice a week and offer a chance to engage with new food and beverages not commonly available from larger retailers in the country.

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<sup>41</sup> Switzerland, Buying and Selling, Stan Bic, available at <https://www.tradecub.stanbicbank.com/portal/en/market-potential/switzerland/distribution#>

### Speciality stores

There are a number of food and beverage speciality retail outlets which focus largely on the high-end of the food and beverage market such as in the sale of organic foods or foods which have been imported from abroad. **Manor** is a well-known department store offering luxury food and beverage items from abroad which can include speciality EU food and beverage products. **Globus** is also another food and beverage speciality store focusing on the sale of high-end delicatessen foods while **Alnatura** is the leading distributor of bio-supermarket food and beverages in Switzerland and is owned by the Migros group.

### E-commerce

As discussed, E-commerce is growing quickly in Switzerland with the country being one of the top five European countries by the proportion of online sales in 2021. The e-commerce market in Switzerland is unique in that consumers generally prefer cross-border trade rather than domestic platforms due to the generally high cost of goods denominated in the Swiss franc compared to other currencies (namely the Euro); although this is for the e-commerce market as a whole not for food and beverages. In relation to food and beverages, Migros and COOP are the largest e-commerce food and beverage retailers in the country, a wider reflection of their position as the two market leaders of food and beverage distribution as a whole in Switzerland. Indeed, the largest online retailer in Switzerland (all product categories) is the majority-Migros owned Digitec-Galaxus. A platform which has emerged specifically for the sale of food and beverage products is farmy.ch. However, it is focused mainly on regional organic products sold directly by producers to consumer; and therefore it is not a platform which is naturally suited to the sale of EU food and beverages.

#### 4.4.3 Intermediaries

A range of potential partners exist for EU exporters to Switzerland. This includes: importers, wholesalers, consultants/agents, retail chains and independent retailers. The end market is likely to play a notable role in the choice of partner.

### Retail sector

It is possible to work directly with some independent retailers – most notably in the case the retailers also works as an importer (this is fairly common). However, one must be aware that the number of independent retailers in Switzerland is falling as larger chains continue to gain ground.

The large retail chains are only likely to consider goods which are being produced and exported to Switzerland on a greater scale. They are likely to apply pricing pressure and will have high demands with regards to quality. For example, when considering chocolate products they will request that the cocoa used as a raw ingredient be free from 'off-flavours' such as smoke, excessive acidity and excessive astringency; and may also have requests relating to the moisture content of the cocoa bean used and recipe of the chocolate (cocoa mass vs cocoa butter content). Despite these quality demands, imported products sold through these large retail chains are unlikely to be able to target the premium segment. Furthermore, as a general rule it is necessary to go through an import partner in order to reach these chains. These import partners help the large retail sector by taking care of the traceability, production conditions, freshness, taste, price, transportation, and warehousing facility for the imported goods; and therefore they make imported goods available to retail chains on the Swiss market. Both major retailers, Migros and COOP use the AMS platform (<https://www.ams-sourcing.com/ams/>) for sourcing private label products; so this provides an alternative potential channel for exporters interested in supplying for private label.

## Food service, hospitality and tourism

It is common to work with a consultant or commercial agent when targeting these segments. There are multiple reasons for this:

- From a financial perspective, as hiring an agent is much more efficient than running an independent office it is likely to be more attractive.
- Cultural differences prevail in each region of Switzerland; this includes differences in language. Local agents can help with navigating these.
- A local agent can help an exporter with their personal contacts and help navigate the demand for specific goods that food outlets and hotels in that area demand. Swiss foodservice outlets and hotels generally appreciate working with a local representative as they view it as a mark of commitment towards building a cordial and trustworthy partnership.

The latter two factors could also mean that the exporters have to employ different agents basis the region the exporter is targeting. One way to search for an agent as an exporter is through checking the cantonal commercial registries (<https://www.zefix.ch/en/hra>). When considering agents, it is important to differentiate between the two main types – commercial agent/partner and commission agent. The latter will tend to act in their own name (rather than the name of the exporter) and will expect a commission for successful sales. Commission agents are subject to the provisions provided in Title Fifteen governing the commission contract (Swiss Code of Obligations, Article 425).

The foodservice, hospitality and tourism sectors are likely to have some specific requirements for products. It is common for them to expect the implementation of protocols and certifications such as Good agricultural practices (GAP), Food Safety System Certification (FSSC), International Featured Standards for Food (IFS) or fairtrade in certain sectors.

## Premium market

Imported premium food and beverage products are more likely to be found in premium hotels, food service outlets and some higher end department stores such as Globus and Reformhaus. Speciality stores which sell premium food and beverage products tend to prioritise Swiss products, though a few will sell imported goods.

The premium market is more likely to be reached through wholesalers and distributors as outlets selling premium products are more likely to reach out to these partners when sourcing their products. The larger wholesalers generally keep a broad portfolio of products and facilitate quality control, transport, warehousing, and financing. This makes them attractive to reseller partners. They are often more specialised by product. Examples include Carnolglob and Delicarna (meat and fish); and Amstein (beers).

Quality is obviously a key consideration when targeting this segment. However, volume will also play a role. Distributors/wholesalers tend to want to have larger volumes in their inventory so that they can quickly supply their customers, meaning that there will likely be certain minimum quantity / frequency of delivery requirements.

For **EU SMEs** targeting the Swiss market, a range of potential partners exist. It is generally more interesting to work with a smaller importer specialised either in the product being exported or food and beverage products from the exporter's country of origin (there are various importers which specialise in Spanish, Italian, French products etc).

Some **final overarching tips for dealing with Swiss intermediaries** are below:

- Swiss businesspeople generally value facts, details, and precision. They generally decide upon a supplier based on medium to long-term thinking and are unlikely to suddenly change. While this may make it more challenging to find a partner at the beginning, it means that carefully cultivated relationships can last a long time. Clear and transparent communication can help with cultivating and maintaining a good relationship.
- It will be important to align with any partner on the method of delivery (air, road, rail or water); delivery time; and payment terms.
- There is a willingness in Switzerland to pay a higher price if the product brings greater value. This is a particularly important point for exporters of premium products. EU exporters should consider this from both angles when working with partners. Firstly they should ensure that the price they are receiving for the product aligns with the market segment targeted. Secondly, the agreement with a partner should reflect the added value that the partner brings (i.e. cheaper may not necessarily be better).
- Key aspects of a potential partner to pay attention to include: their connection to Swiss consumers (most notably their sustainability credentials); reliability; and financial health status. Certifications (e.g. Bio Suisse) can help with assessing the former, as can any independent audits that have been performed on the potential partner. The reputation of the potential partner on the market along with any financial reports may assist with assessing the latter two factors.
- Against the background of a strong inherent bias towards Swiss products (and high tariffs on some agri-food products), innovation can be an important factor for assisting imported products to gain market share. This innovation may relate to the product itself (e.g. offering something which is not on the domestic market) or to the positioning of the product (e.g. through the use of certifications and claims to position the product as ethical or healthier).
- It may be worth targeting a certain region when first entering the market, with the choice of region depending on the product itself. Both the product and competition should be taken into account when making this decision. For example, French origin products often do well in French-speaking regions, potentially providing opportunities for French exporters but challenges for exporters of other origins. This is also true to a certain extent for German products in German-speaking regions, and Italian products in the Italian region. This means that, for a product such as wine, there may be a natural fit for French and Italian producers in the corresponding regions; but also opportunities in the German-speaking region for products of other European origins.
- Following on from the above, while there are a few larger distributors in Switzerland, many are regional / local – further emphasizing the importance of the choice both of region and of partner.
- Some companies that export to Switzerland use food packaging translation services so that their products meet the linguistic and regulatory requirements of Switzerland. It may be worth discussing linguistic requirements with partners/potential partners and then deciding if the use of such translation services is beneficial.
- Fluctuations in the exchange rate between EUR and CHF can cause problems to both the importer and exporter. Against this background, exchange rate hedging or setting the exchange rate in advance may be beneficial to avoid problems / provide certainty.

#### **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

Switzerland is a very pro-business country considering that the two largest cities of the country, Geneva and Zurich are banking and financial hubs both within Switzerland and internationally. In 2020, Switzerland ranked 36<sup>th</sup> in the world bank's ease of doing business index achieving the status of "very easy". The taxation system, although devolved to the cantons is known for being easy to navigate and registering a new property in the country is relatively straight forward. Switzerland also allows freedom of movement for EU citizens allowing all EU citizens to travel freely to Switzerland, buy property in the country and set up residency in the country.

#### 4.4.5 Key operational considerations and challenges: summary

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

- The country is linguistically very diverse. In general, any business activities taking place in Geneva or within the west of Switzerland will be done in French, and activities taking place in the north, central and north eastern regions of Switzerland including the city of Zurich will be in German while activities near the Italian border in cities such as Lugano will be in Italian. Make sure to research the official language of the canton you intend to travel to, to get an indication of which language will be spoken there. The use of English throughout Switzerland for business activities is high although one should have some knowledge of the local language of the canton that business activities are being conducted in.
- Taxation and legislation impacting local issues are implemented by the canton rather than at a state level which is more common in other European countries. One should research the specific pieces of legislation likely to impact business activity implemented at both the canton and the federal level, although legislation at the canton level is more likely to impact local business activity.
- Keep in mind that Switzerland is a very expensive country and those travelling from outside of the country and not receiving a Swiss salary will find that Switzerland is much more expensive than other European countries. For example, consumer prices are 42% more expensive in Switzerland than in neighbouring France, with this figure rising to 51% when comparing Germany to Switzerland.
- Swiss business culture is formal and conservative, the Swiss place a high emphasis on punctuality, efficiency and politeness, and any deviation from these business practises will likely not be well received.
- The cantons of Switzerland set their public holidays independently of each other (*with the exception of the 1<sup>st</sup> August which is a federal holiday and the national day of Switzerland*). It is important to research the public holidays of the canton you intend to do business in, in order to avoid any potential clashes when organising a business meeting.
- Figure 4-6 below shows the currency exchange rate between the Euro and the Swiss franc (CHF) for the past five years (end of 2017- mid-2022). The Swiss Franc has strengthened in recent years, with the exchange rate is largely impacted by both the wider international

economic situation and the economic situation within Europe. The CHF currency is often used to denominate foreign loans but it is not considered a global reserve currency due to the share of foreign exchange reserves held in Switzerland being historically quite low.

**Figure 4-6: Five-year evolution of the EUR-CHF currency exchange rate: 2017-2022**



Source: XE Currency converters: Euro to Swiss Franc (CHF) exchange rate chart, available at

[Euro to Swiss Franc Exchange Rate Chart | Xe](#)

#### 4.4.6 Other relevant information

##### Methods of payment in Switzerland

The Swiss Franc (CHF) is the sole legal currency in Switzerland (*and in the neighbouring microstate of Liechtenstein as well as the small Italian exclave of Campione d'Italia*). Goods and services are priced in CHF and will incur fees for EU merchants using the Euro to purchase from a Swiss entity. Cash remains a popular method of payment transaction, still accounting for the majority of sales despite credit cards catching up during the COVID-19 pandemic. All major credit cards such as Visa, Mastercard and American Express can be used in Switzerland although currency exchange rate fees will be incurred if using a foreign bank account. TWINT is a popular mobile app used for payment in Switzerland with there being an estimated 3 million users of the app in Switzerland. Some stores in Switzerland particularly within larger urban centres or in mountainous tourist hotspots will accept Euros although they will virtually always give any change in the Swiss Franc. It is best to research a store's policy on accepting Euros before attempting to purchase anything in the Euro currency in Switzerland.

##### Travel from the EU to Switzerland

Switzerland has agreed to implement freedom of movement for all EU citizens to Switzerland, meaning that EU citizens can travel to Switzerland in the same way they could travel to an EU member state. All EU 27 member states have freedom of movement access to Switzerland.

## 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
Processed Meats	Processed fruit and vegetables	Pet food
Biscuits / cereal bars	Baked goods	Live plants

## 5.1 Fresh meat

### 5.1.1 SWOT analysis

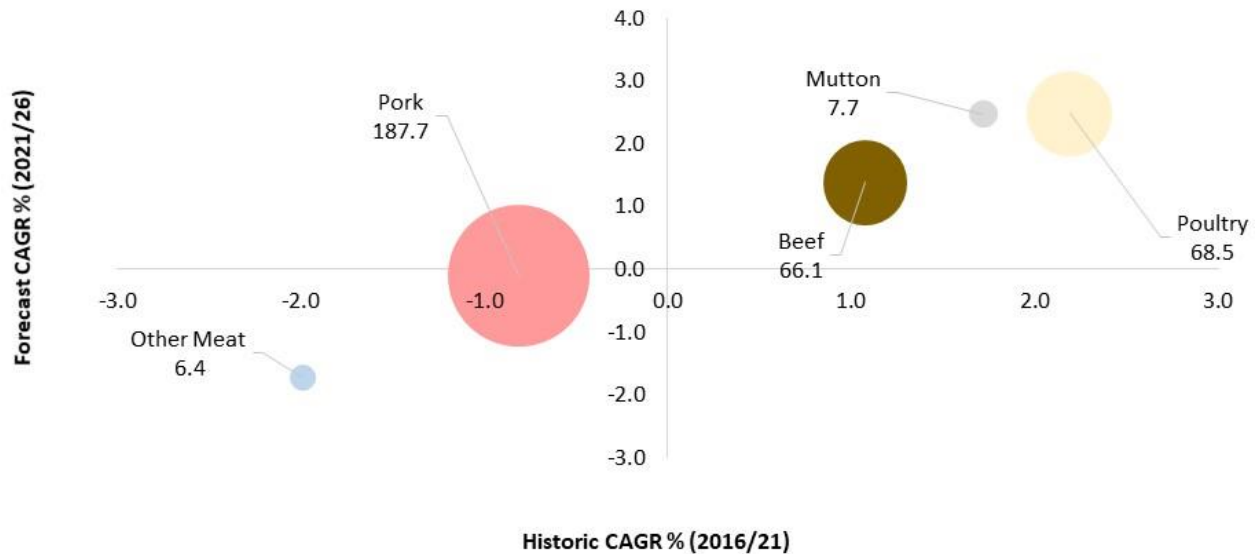
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> <li>▪ Culture of fresh meat consumption, many traditional dishes contain fresh meats of a wide variety.</li> <li>▪ Overall structural shortage of fresh meat.</li> <li>▪ EU fresh meats are cheaper than domestically produced ones and hence may appeal to price-conscious consumers.</li> <li>▪ Swiss consumers generally appreciate fresh meat production practises implemented in the EU when compared to those of other third countries.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Import restriction of 1kg of meat products per person arriving from the EU, limits the personal transport of meat products to Switzerland and helps shield domestic producers from cheaper cross border purchased meat.</li> <li>▪ Consumers have been shown to spend more on domestic fresh meat products over cheaper imported fresh meat products.</li> <li>▪ The desire to support the local economy and domestic fresh meat producers plus their methods is high in Switzerland.</li> </ul>
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> <li>▪ Organic meat consumption has risen in recent years.</li> <li>▪ Poultry meat will continue to grow in Switzerland while other meat categories decline, and there is a structural shortage of the meat.</li> <li>▪ Niche meats which are not mass-produced in Switzerland such as lamb and goat meat.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Rise in vegetarianism in the country coupled with an increasing number of consumers monitoring and limiting fresh meat consumption</li> <li>▪ Imports from Brazil are the biggest threat from a third country.</li> <li>▪ Concerns about animal welfare and the environmental impact of fresh meat products are high amongst the Swiss population. These factors create a preference for domestic production.</li> </ul>

### 5.1.2 Consumption

#### Evolution of consumption

Figure 5-1 below shows that pork is the most popular fresh meat product in Switzerland with a total volume of 187 000 tonnes. Pork declined by a compound annual growth rate (CAGR) of -0.8% between 2016 and 2021. Looking ahead, the CAGR of pork will continue to decline at a rate of -0.1% between 2021 and 2026, however, it will remain the most popular fresh meat in Switzerland. Poultry is the second most popular fresh meat product in Switzerland with a total volume of 68 000 tonnes. Poultry is also the fastest-growing fresh meat product in Switzerland in recent years with a CAGR of 2.2% between 2016 and 2021. Going forwards, the status of poultry as the fastest-growing fresh meat in Switzerland will remain with a predicted CAGR of 2.5% between 2021 and 2026. Beef has a total volume of 65 000 tonnes and is expected to grow at a CAGR of 1.4% between 2021 and 2026. Mutton is a smaller meat product consumed in Switzerland with a total volume of 7 700 tonnes in 2021. Other meat products have a total volume of 6 400 tonnes and are expected to decline by a minus CAGR of -1.7% between 2021 and 2026.

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



Source: Euromonitor International: Fresh Food, 2021.

## Consumer profile and purchase criteria

### Consumers

Consumption of fresh meat products in Switzerland is common; however per capita consumption is lower than in many other European countries. It is roughly 65 kg in Switzerland compared to around 80kg per capita in neighbouring France and Germany and over 85kg per capita in neighbouring Austria. Consumers in Switzerland as a whole are aware of the impact of meat consumption on both health and the environment; and indeed just under half of Swiss consumers have indicated they try to consume less meat / substitute meat with other products for these reasons.

Younger consumers in Switzerland are noted for eating far less meat than their older counterparts with the adoption of a vegan lifestyle also being quite common amongst the age group of consumers between the age of 18-34. It is estimated that 6% of consumers within this age bracket identify as vegan, while a further 17% identify as “flexitarian” which means they readily make efforts to monitor and limit fresh meat consumption. Higher awareness of sustainability issues is a major reason for this lower consumption. This consumer segment has been a strong driver of demand for meat substitute products – the market for which grew at almost 20% per year over the 2016 to 2021 period.<sup>42</sup>

Consumers between the ages of 35-56 eat the most meat on average, with the absolute peak in meat consumption being in the 50 to 64 year old segment. However within this age group there has also been a notable decline in overall meat consumption with pork consumption, in particular,

<sup>42</sup> 2.6 million Swiss are reducing their meat consumption habit, live kindly, available at <https://www.livekindly.com/swiss-guidelines-citizens-drop-meat-consumption-66/>

falling in recent years. While older consumers consume a larger amount of fresh meat compared to younger consumers, they are also less likely to consume fresh meat products that are considered niche to Switzerland such as lamb and goat meats.

Finally, the level of vegetarianism is higher among women than men – with just over 6% of Swiss women identifying as vegetarian compared to just under 4% of Swiss men. Similarly, the level of overall meat consumption is considerably greater among Swiss men than among women.

### Drivers and method of consumption

There are several key drivers of consumption in Switzerland which help to sustain fresh meat consumption in the country, these include:

- **Consumption of fresh meat with traditional Swiss dishes.** Traditional Swiss dishes such as *Cordon Bleu* and *Fondue Bourguignonne* (Beef Fondue) encourage the consumption of certain fresh meat products. These foods will appeal to consumers of a more traditionalist consumption habit as well as tourists arriving in Switzerland seeking to sample the local cuisine. Fresh meat is also often enjoyed alongside melted cheeses and bread in what is known as a *raclette* which is very popular in Switzerland and is a common social activity that occurs during the colder winter months in the country.
- **Supporting the local economy.** Consumers in Switzerland have been shown to spend more on products that are produced in Switzerland even if they are typically more expensive than fresh meat products produced in neighbouring countries (as is the case with fresh meat). Consumers are proud of Swiss products generally and respect the animal rights and production practices implemented in Switzerland; indeed these helps to offset some of the concerns around meat consumption. For example, there are limits on the maximum number of animals that Swiss farmers can keep (300 calves, 1 500 pigs and 18 000 hens per farm) and stricter limits on transport times for animals. Consumers who rarely consume meat, therefore, are more likely to seek out Swiss-produced fresh meat products when they do decide to purchase fresh meat due to a desire to support both the local economy and also ensure that the animal was treated with greater respect.
- **Summertime BBQs (Brotle).** BBQs in Switzerland are a common outdoor activity during the warmer summer months of the country. A Swiss BBQ (commonly called a *Brotle*) refers to the activity of cooking outside and is enjoyed by many Swiss consumers, it largely mirrors BBQs found in many other countries with a large BBQ culture such as the USA or Brazil. The average Swiss consumer typically cooks and consumes pork and poultry products during their *Brotles*. The *Brotle* also compliments the general Swiss lifestyle which includes the desire to be outdoors during the warmer months; indeed, there are many locations set up across Switzerland with the expressive purpose of hosting a *Brotle*.

Other methods of consumption mirror those found in other European countries such as the dinner meal being the biggest meal that will involve the consumption of fresh meat products. Swiss consumers typically do not consume much if any fresh meat products for a standard breakfast although the consumption of fresh meat for a lunch meal is more common, particularly if dining in an on-trade establishment.

### Purchase criteria

As discussed above, Swiss consumers have been shown to spend more on average for fresh meat products that have been produced in Switzerland. Ultimately this is due to the higher price of Swiss-produced meat (its retail price is almost 2.5 times greater than the average retail price of meat in the EU). As noted above, despite the high prices consumers have a clear preference for domestically produced meat; this preference is due to a combination of reasons ranging from

the desire to support the local economy to a high amount of faith in the livestock production practices implemented in Switzerland. Many farmers also take part in animal welfare programs and seek labels to showcase further that their fresh meat products have extremely high standards which resonate with consumers. The preference for domestically-produced meat can be seen through the origin of meats available through retail channels in Switzerland; over 80% of bovine meat and almost 100% of pork sold through retail is Swiss in origin.

Price-conscious consumers will be more likely drawn to imported fresh meat products from Germany or other EU countries as these countries have a larger production base and export a large volume of poultry and bovine meat to Switzerland. Swiss consumers also largely respect the production practices implemented in EU countries; although on balance, those who can afford to will likely decide to purchase a domestically produced fresh meat product if available for the reasons previously set out. Nonetheless, some foreign producers use voluntary animal welfare labelling in order to help appease the animal welfare concerns of Swiss consumers.<sup>43</sup>

The price conscious segment may also choose cheaper poultry cuts over red meat in order to address the issue of affordability from a different angle. Consumers as a whole are more likely to be price conscious when purchasing poultry products than when purchasing red meat products. The criterion of quality tends to be taken into account when purchasing red meat products – beef in particular. The cut and intended end use is also commonly taken into account when purchasing red meat products (pork in particular). Popular cuts and their end uses include: pork chops (barbecue); beef tenderloins (various Swiss dishes); and lamb leg or neck (certain stews).

### Recent market trends

Total consumption of fresh meat has been declining in Switzerland, this comes from a combination of factors including: a rise in interest in animal rights; environmental concerns; and the high costs of domestically produced fresh meat products.

Animal rights concerns heavily influence the Swiss consumer base and are a key factor explaining both the rise in vegetarianism and the heavily regulated animal rights legislation found in the country. Swiss concerns about animal rights also led to a referendum on an outright ban on animal factory farming in September 2022 with 38% of voters voting to ban animal factory farming, not enough to pass the vote but a clear indication that animal rights concerns in Switzerland are a large issue. Swiss consumers also have concerns relating to the environmental impact of fresh meat production with the output of methane from cattle production being a large percentage of Switzerland's total emissions output.

Concerns about sustainability issues and health are the key reason that demand for poultry has, and continues to grow in Switzerland at the expense of other meats. As was seen in the previous section, poultry was both the fastest growing meat category over the last five years, and is forecast to be the fastest growing over the next five years. The meat is proving particularly popular among the Francophone Swiss. Despite the aforementioned Swiss overarching preference for domestically-produced meat, there is a strong structural shortage of poultry (the country is only about 2/3s self-sufficient); leading to a reliance on imports to a degree.

Demand for meat alternatives also has and continues to increase in the country. For example, in 2021 one fifth of all burgers sold in the retailer Co-op were vegetarian. Retailers are reacting to this increased demand by trying to offer an even broader range of meat-alternative products.

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<sup>43</sup> It should be noted that such labels must be approved for use by the country of origin and Switzerland.

Finally, domestically produced Swiss meat products are generally expensive (roughly twice as expensive as neighbouring countries) which increasingly dissuades consumers from purchasing fresh meat on a regular basis. While imported fresh meats are cheaper, many consumers retain a desire to purchase Swiss fresh meat products to support local farmers and producers in the country.

#### **Fresh meat on retailers' shelves in Switzerland**

The retail price of meat depends on the meat and cut. Red meat tends to be priced more as a premium product, while white meat has a more economy pricing. Premium red and game meat (including imported) may retail for above CHF 50 per kg, though mainstream poultry tends to sell for between CHF 10 and 25 per kg depending on the cut. As noted above, there is a strong inherent bias towards Swiss-reared meat. As a result, it is common to find the Swiss flag on the packaging of domestically produced meat.

*Below: red meat and poultry in a major supermarket. It is possible to make out the Swiss flag on the packages of most products.*





Fresh meat sold in modern retail outlets tends to be prewrapped in flexible paper or plastic packaging. With sustainability high on the agenda, there is increased interest in packaging minimisation, recyclability and FSC certified packaging materials. Some retailers are keen for materials fulfilling these criteria to be used.

*Below: fresh meat in two discounters. Meat is organised by species. The use of flexible packaging is common. With meat from different countries available in these outlets, the use of the Swiss flag is rarer.*





### 5.1.3 Offer

#### Domestic production

The fresh meat production sector in Switzerland is smaller than in other European countries however much of the production is catered to the local market rather than specially to be mass exported to other countries. Most pig and chicken farms in the country are small in scale with legislation in the country ensuring that this remains the case; for example, a producer may only have a maximum of 18 000 laying hens which compares to the average of 30 000 laying hens found in a typical German farm.<sup>44</sup> This is a consequence of a desire for the government to ensure animal rights measures are maintained which extends to limits on the number of animals that can be held at a farm. Roughly 80% of the fresh meat produced in Switzerland will be consumed in the country with imports making up the remaining 20% - particularly for poultry and bovine meats. Fresh meat production is more flexible in Switzerland compared to other products such as fruit and vegetables as fresh meat production can be undergone within the more mountainous regions of the country which allows for fresh meat production throughout the country. Poultry is the most produced fresh meat in Switzerland with farmers taking advantage of the smaller size required for poultry farming coupled with a rise in demand for poultry meat in Switzerland in recent years.

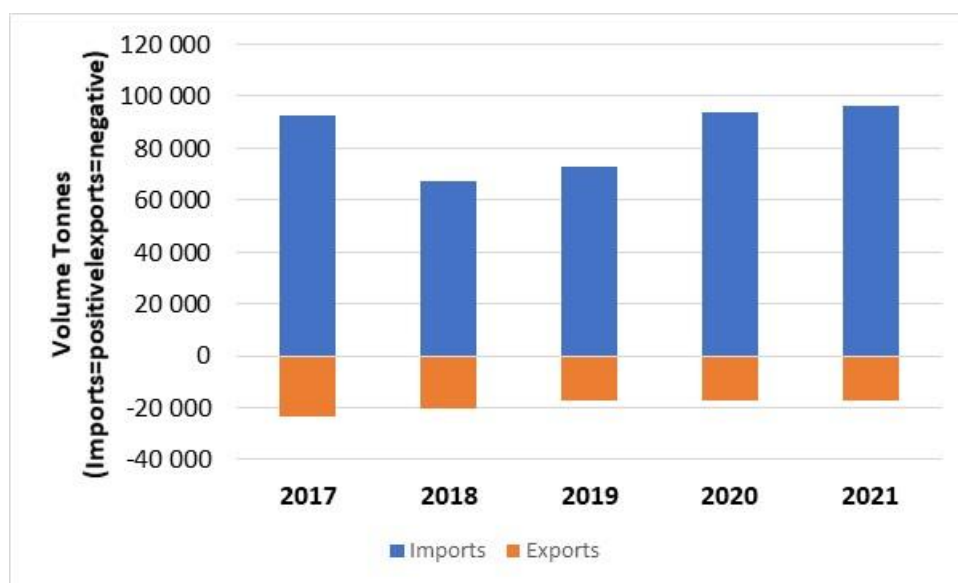
#### Imports and exports

Figure 5-2 below shows that Switzerland is a net importer of fresh meat having a considerable trade deficit in the product for the past five years. Exports have remained stable in recent years at around a volume of 20 000 tonnes. Swiss imports have fluctuated in recent years from a figure of 90 00 tonnes in 2017 to 65 000 tonnes in 2018 before recovering to a volume of 95 000 tonnes in 2021. As stated previously, around 20% of fresh meat consumed in Switzerland is imported from abroad.

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<sup>44</sup> Meat in Switzerland is pricey but does everyone benefit? DW, available at <https://www.dw.com/en/switzerland-meat-animals-farmers/a-54550887>

**Figure 5-2: Trade balance (imports and exports) of fresh meat in Switzerland, 2017-21; volume tonnes**

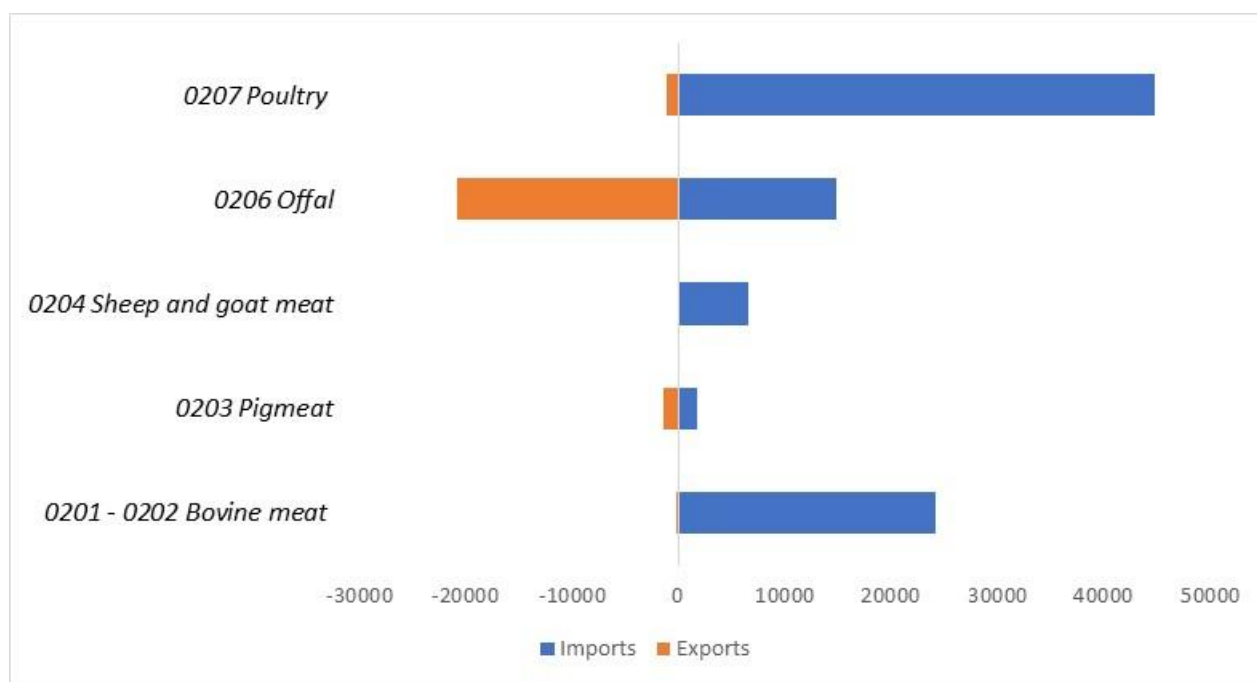


Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

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

Figure 5-3 shows the categories of fresh meat imported and exported by Switzerland. Poultry is the most imported fresh meat product at around 40 000 tonnes in 2021; this is followed by bovine meat of which the country imported a volume of 25 000 tonnes in 2021. Imports and exports of offal and pigmeat are more balanced with Switzerland having a trade surplus in the trade of offal meats. Pigmeat imports and exports are relatively small.

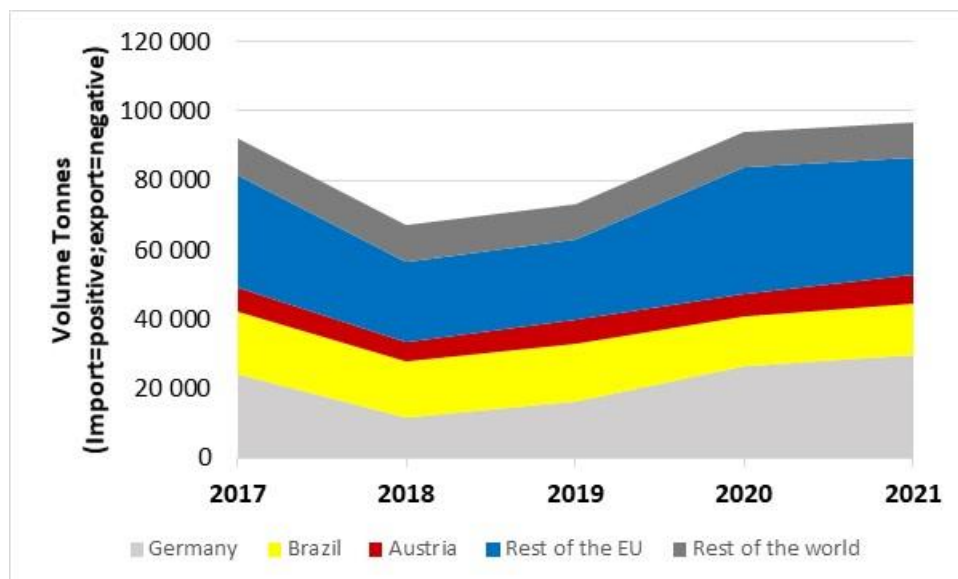
**Figure 5-3: Trade balance (imports and exports) of fresh meat in Switzerland, by type, 2021; volume tonnes-6665**



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 Switzerland in recent years with the country exporting 29 000 tonnes of fresh meat in 2021. This is followed by Brazil which exported a total of 15 000 tonnes in 2021. Austria also exported 8 000 tonnes of fresh meat in 2021. The rest of the EU exported a total of 33 000 tonnes in 2021 with the EU member states of Ireland, Poland and the Netherlands being the larger EU exporters beyond aforementioned Germany and Austria.

**Figure 5-4: Swiss imports of fresh meat by country, 2017-21; volume tonnes**

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

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

## EU GI products

As noted in section 4.2.4, EU fresh meat products with GI protection are further granted full GI protection in Switzerland.

## Main competitors

The main competitor in the Swiss fresh meat market comes from domestic producers. Roughly 80% of fresh meat that is consumed in Switzerland is also produced in the country and consumers place a high emphasis on the Swiss livestock production practices. Swiss producers also benefit from a consumer base which has been shown to spend more to purchase Swiss products instead of cheaper imported ones. EU fresh meat products are however also held in high regard, with the biggest challenge being the need to compete with the Swiss desire to purchase domestic fresh meat products. Brazil is the largest competitor outside of domestic producers with Brazil focusing on the exportation of beef and poultry meats. Overall, however, the EU as a whole exports roughly triple the amount of fresh meat to Switzerland than Brazil does.

### 5.1.4 Specific market entry requirements

#### Market Access and Entry

Importers and operators of fresh meat products exported to Switzerland must be registered within the wider EU TRACES database. The competent authority regarding animals and animal products is the Federal Food Safety and Veterinary Office (FSVO) while the authority responsible for phytosanitary control is the Federal Office for Agriculture (FOAG), Federal Plant Protection Service. The importer will also need for certain fresh meat products such as poultry and bovine meat, a general import permit for agricultural products. If you are exporting a product labelled as

“high-quality beef” then a certificate of high-quality beef which meets Swiss standards must be accompanied.

For individuals carrying meat into the country, there are limits on the amount which can be brought into Switzerland duty-free. This limit is 1 kg per person, per day. The aim of this measure is to reduce the influx of cheaper meat products from entering the Swiss market.

Tariffs for imported fresh meat vary based on the cut. Tariff rate quotas exist for certain volumes. Please consult the link below for full details.

**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 Spain to Switzerland***

[Search | Access2Markets \(europa.eu\)](#)

### Standards, SPS measures, labelling

The EU and Switzerland share a common SPS area, as such, SPS checks on animals arriving or transiting through Switzerland from the EU have been abolished at the border, and certain intra-EU documents such as registering with TRACES (see above) are required.

Swiss labelling requirements for meat differ slightly from the EU. The following information, if relevant, must be clearly labelled on meat products :

- meat produced using certain hormonal or non-hormonal performance-enhancing substances.
- meat from rabbits kept under conditions prohibited in Switzerland.

### 5.1.5 Distribution

The main retail distribution channels for fresh meat are:

- **Supermarkets.** These are estimated to account for the distribution of 60% of fresh meat in Switzerland. Migros and Co-op are the major players – as is the case for supermarkets as a whole. Private label products from these supermarkets are highly popular. Co-op has worked with the Swiss Animal Protection (SAP) on its own animal husbandry programmes for over 25 years.
- **Butchers' shops.** These account for the distribution of around 35% of fresh meat through retail channels. They are particularly popular for the sale of premium meat cuts, including most notably beef. Butchers are generally independent but with strong connections to the farms from which the meat originates.
- **E-commerce.** This is a growing channel for the distribution of meat, with sales through e-commerce expected to reach around EUR 170m in 2022. While the channel is being used for the sale of premium cuts by many brands, interestingly enough it is also being used to offer some imported products (generally of a higher quality). An example of an online meat retailer in the country offering a wide range of products (including imported ones) is <https://meat4you.ch/>

### 5.1.6 Challenges for EU products

The main challenge for EU producers is competing with domestic Swiss-produced fresh meat products. Swiss consumers place a high emphasis on the domestic livestock production practices. There is a both a high level of concern about animal rights, and a general desire to purchase Swiss-produced products. Total meat consumption is also declining in Switzerland which continues to limit the capacity to scale business growth in the country relating to fresh meat consumption, although the population is expected to continue growing which will offset some of the per capita declines in meat consumption in the country.

### **Market Takeaway: Fresh meat**

**Consumption:** *The consumption of pork is the most common in Switzerland – both historically and at present. Poultry consumption is growing and represents the fastest-growing fresh meat product in Switzerland. Younger consumers on average consume lower levels of fresh meat products when compared to their older counterparts.*

**Competition:** *Domestic production is the largest competitor to EU fresh meat products in Switzerland as consumers have been shown to spend more on domestic fresh meat products than cheaper imported fresh meat products in the country. Roughly 80% of all fresh meat consumed in Switzerland is domestically produced.*

**Distribution:** *60% sold through supermarkets; around 35% through butchers' shops. E-commerce increasingly in popularity.*

**Challenges:** *A total decline in fresh meat consumption coupled with the desire to purchase Swiss-produced fresh meat products amongst many consumers are the biggest challenges for EU fresh meat in Switzerland.*

**Opportunities:** *Poultry is the biggest opportunity area in Switzerland in terms of growth rates in consumption and the reliance on imports. Swiss consumers are increasingly switching from pork consumption to poultry consumption although going forward pork will remain the most preferred fresh meat product in the country.*

## 5.2 Fresh fruit and vegetables

### 5.2.1 SWOT analysis

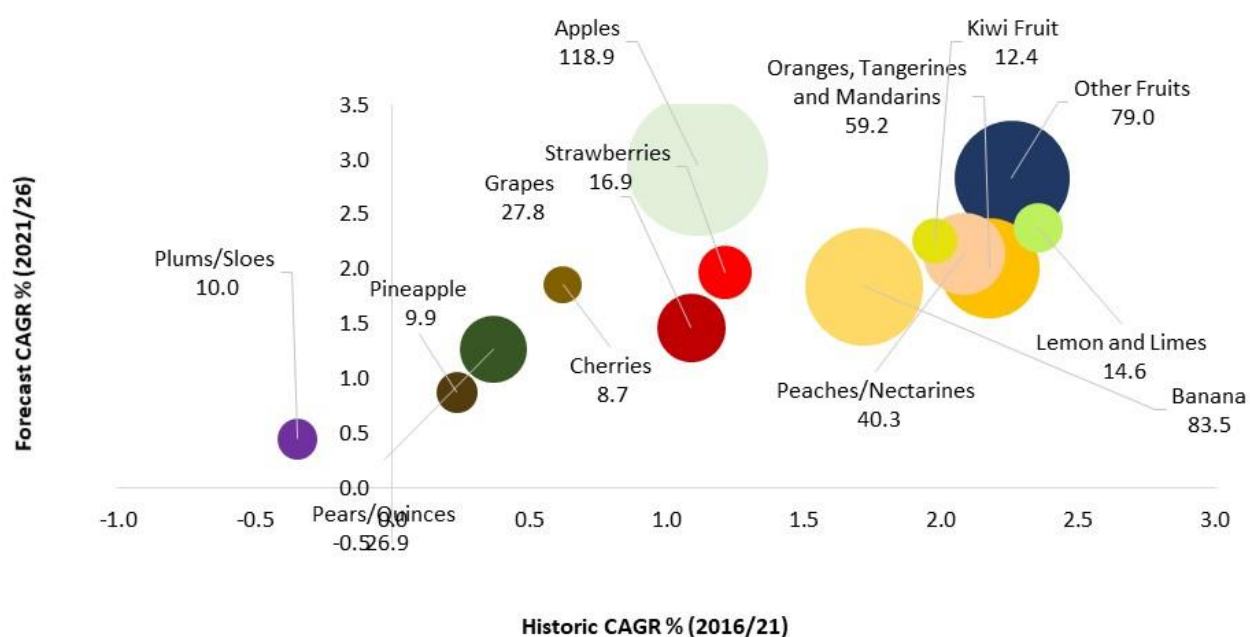
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> <li>▪ Fruit and vegetable consumption habits mirror that found in other European countries resulting in less need to change products being sent to the Swiss market.</li> <li>▪ EU accounts for roughly half of fruit exports to Switzerland and three-quarters of vegetable exports.</li> <li>▪ Swiss consumers appreciate EU fruit and vegetable production practices.</li> <li>▪ Geographical proximity of the EU provides an advantage over other countries in terms of the freshness of produce upon arrival.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Swiss consumers increasingly demand niche fruit and vegetable which are not mass-produced in the EU such as dragon fruit and durian.</li> <li>▪ Fruit and vegetables are expensive in Switzerland which dissuades low-income earners or tourists from purchasing a large amount of them</li> <li>▪ The most consumed fruit product, apples, is also the most-produced fruit in Switzerland.</li> </ul>
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> <li>▪ Fruit and vegetable represent an area in which Switzerland does not have a high level of self-sufficiency in production; meaning that high levels of imports are a necessity.</li> <li>▪ Cranberries and blueberries were the fastest-growing fruit category in Switzerland between 2021 and 2026 with maize being the fastest-growing vegetable product in the same period.</li> <li>▪ Switzerland is a heavy importer of fruits it cannot produce to scale domestically including citrus fruits, bananas and kiwis.</li> <li>▪ Strong and growing demand for high-quality organic fresh produce, as well as produce with low pesticide usage.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Competition from third countries such as Morocco and Turkey.</li> <li>▪ Demand for imported products during the northern hemisphere winter represents a period during which EU producers may struggle to produce the demanded volumes from Swiss consumers.</li> <li>▪ Swiss production of certain fruit and vegetables continues to grow, particularly for tomatoes, apples and berries.</li> </ul>

### 5.2.2 Consumption

#### Evolution of consumption

Figure 5-5 shows that apples are the most popular category in Switzerland by total volume, with a total volume of 118 000 tonnes in 2021. This is followed by bananas with a total volume of 83 000 tonnes and the other fruit category with a total volume of 79 000 tonnes. Across all fruit categories with the exception of grapefruit, growth is predicted in coming years with the fastest-growing fruit category expected to be cranberries/blueberries (forecast to grow at a CAGR of 3.5% between 2021 and 2026). This is ahead of the second fastest-growing fruit category which is apples with a predicted CAGR of 2.9% over the same period. Apples will further remain the most popular fruit category by 2026.

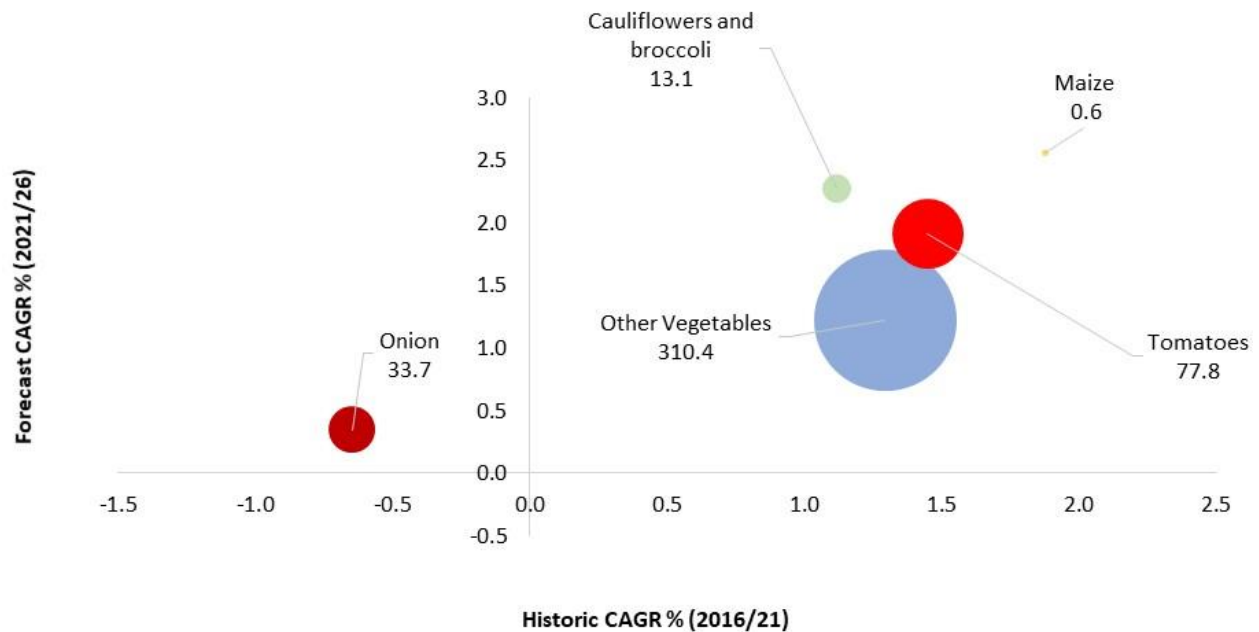
**Figure 5-5: Evolution and forecast of fruits market (000 tonnes) in Switzerland, 2016-2026; total volume**



Source: Euromonitor International: Fresh Food, 2021.

Figure 5-6 below shows that other vegetables are the largest consumed vegetable category in Switzerland by a considerable amount with a total volume in 2021 of 310 000 tonnes. Tomatoes have a total volume of 77 000 tonnes with a predicted CAGR of 1.9% between 2021 and 2026. Onions with a total volume of 33 000 tonnes in 2021 will remain the third-largest vegetable product in 2026 with a predicted CAGR of 0.3% forecast over the coming five years. Maize will be the smallest category with a predicted CAGR of 2.6% between 2021 and 2026 from its current total volume of 600 tonnes.

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



Source: Euromonitor International: Fresh Food 2021.

## Consumer profile and purchase criteria

### Consumers

Consumption of fruits and vegetables mirrors that of other European nations with the most popular fruits in the country being apples, bananas, grapes and mandarins. For vegetables, consumption patterns are also similar to those of European nations with potatoes, onions and carrots being among the more popular vegetable products. Swiss consumption per capita stands at roughly 84 kg per person which is in line with other countries in the region, though lower than total consumption per capita in neighbouring Italy and Austria. Total vegetable consumption stands at around 93 kg per capita, also in line with many other European countries.

Consumption of fruit and vegetables is growing amongst all age groups in Switzerland. Younger consumers are enticed by these products offering a substitute to fresh meat products and further appreciate the health benefits of consuming fruit and vegetable products. Middle-aged and older Swiss consumers further also appreciate the health benefits of fruit and vegetable consumption. Consumers in urban centres will have access to a wide variety of fruit and vegetables which aids consumption of imported fruit and vegetables amongst this consumer group. Rural consumers which generally also have access to larger retailers will be more likely to consume fruit and vegetables which can be grown domestically such as apples, carrots and potatoes. On balance, Swiss women are slightly keener consumers of fruit and vegetables than men.

The different linguistic groups in Switzerland have slightly different consumption patterns for fruit and vegetables. Potatoes, cabbage and apples are particularly popular in many Germanic areas, while leaf vegetables and various fruits are more in demand in some French speaking areas. Due to influences from Italian cuisine, tomatoes and aubergines are popular both in Italian areas and

among Swiss residents of Italian origin. Consumers from a migrant background which have a strong culinary tradition of frequently using certain fruit and vegetables are also key consumers in the Swiss market. Most notably this includes migrants from Mediterranean countries (most notably Italy, France and Spain) as well as Albanian and Turkish origin consumers.

### Drivers and method of consumption

Some notable drivers that aid fruit and vegetable consumption in Switzerland include:

- ***The health benefits of fruit and vegetable consumption.*** Swiss consumers have always been largely health conscious; however this was further accelerated by the outbreak of COVID-19 in the country which highlighted the benefits of having a healthy and balanced diet. Total consumption of fruit and vegetables has been growing in Switzerland and demand for new and niche fruit and vegetables continues to be a large factor in driving the sales of fruit and vegetables in the country. Various Swiss cantons have also engaged in programmes aiming to highlight the benefits of fruit and vegetable consumption which further aided overall consumption in the country.
- ***Seasonality.*** Like many other European countries, Switzerland is heavily influenced by the seasons which impacts its capacity to grow certain fruit and vegetables throughout the year, this leads to spikes in demand for certain fruit and vegetables when they are in season, such examples include:  
***Winter*** - leek, kale, parsley root, chicory  
***Autumn*** - pears, apples, carrots  
***Summer*** - cauliflower, onions, cabbage; plus melons and some citrus.  
***Spring*** - apples, strawberries, broccoli

Consumers regularly consume fruit and vegetables throughout any meal of their day with notable examples including having a piece of fruit for breakfast, a salad at lunch and a combination of vegetables for dinner including potatoes, carrots or onions.

### Purchase criteria

Consumers in Switzerland are accustomed to paying higher prices for foods which extend to fruit and vegetables. Generally, apples, potatoes and carrots are among the cheaper fruit and vegetables on offer in Switzerland and these appeal to cost-conscious consumers in the country. The larger retailers COOP and Migros through their large market presence and partnerships with producers generally offer competitive prices for fruit and vegetables which entices consumers to continue to utilise these retailers to a large extent when purchasing their fruit and vegetable products. The desire for Swiss-produced products, as seen in sectors such as meat and dairy, is less present for fruit and vegetables due to the country having less capacity to mass-produce fruit and vegetables. As a result, Swiss consumers lean on the desire to have EU-produced fruit and vegetables when available due to various factors including the appreciation of EU fruit and vegetable production practices amongst Swiss consumers.

With Swiss origin not playing such an important role as a purchasing criterion, many consumers pay close attention to certifications when purchasing fresh produce. Organic and fair trade certifications are the two certifications that consumers pay attention to the most. Quality and production methods are also commonly taken into account by Swiss consumers, with many Swiss consumers believing that products from smaller local farms are more likely to be of a higher quality and use lower levels of pesticides. Inherently this association does favour domestic Swiss production to some extent; though imported products are not entirely excluded from taking advantage of this criterion.

Finally, as mentioned above, seasonality impacts consumption patterns in Switzerland, and subsequently it is also taken into account by consumers when making their purchase decision.

### Recent market trends

As stated, total fruit and vegetable consumption in Switzerland is continuing to grow in recent years, this is a result of a variety of factors concerning health consciousness, a decline in meat consumption and promotional efforts amongst certain cantons in Switzerland. Indeed, the number of vegetarians in the country is growing in the country, providing a tailwind for the fruit and vegetable market. A “five a day” campaign has been running in Switzerland in recent years, and this has also helped boost fresh fruit and vegetable consumption.

Across almost all fruit and vegetable categories mentioned, there is a forecasted growth rate predicted between 2022 and 2026 which reflects that the Swiss market is a healthy market to engage in for the coming years. As demand in Switzerland continues to grow coupled with a country that already has a large trade deficit in the trade of fruit and vegetables, the market for imported fruit and vegetables will likely remain strong in the country which acts as an incentive for EU fruit and vegetable producers to export to Switzerland.

Categories of fruit and vegetable which show particular promise at present are:

- **Exotic and citrus fruits.** Demand for these fruits grew rapidly in 2020 after years of steady growth, and are the fruits are expected to remain popular going forwards. While European producers may struggle to supply fruits such as pomegranates, passion, avocado and lychees, many are well-positioned to meet increasing demand for citrus fruits.
- **Organic fruit and vegetables.** As noted above, there is strong demand for organic produce in Switzerland, and this was further boosted by the COVID-19 pandemic. The organic equivalence agreement between the EU and Switzerland provides EU producers with possibilities to address this market.
- **Mini vegetables.** Mini carrots, baby corn and cucumbers have been popular for many years. However, recently there has been interest in mini varieties of other vegetables such as aubergines, peppers and asparagus. Smaller versions are proving popular due to the suitability for snacking when eaten raw; their ease of preparation (often no peeling or cutting required); and the low level of waste.

#### Fruit and vegetables on retailers' shelves in Switzerland

Fresh fruit and vegetable prices depend on the type and season. For example, citrus fruits are often found in the CHF 2 to 5 price range per kg; most mainstream vegetables sell for between CHF 3 and 8 per kg; while berries typically retail closer to CHF 10 per kg. With Switzerland facing structural shortages of fruit and vegetables, and consumers generally not willing to pay a premium or settle for economy products, most imported products will be priced for the mid-range. Organic products – which are popular – typically command a premium, though the magnitude of this premium can vary considerably.

*Below: fruit and vegetable displays in a large supermarket chain.*



In modern retailers, products may be sold pre-packaged or loose, depending on the product itself. With a high interest among consumers in certifications, it is common to find a clear indication of the organic status on the label and/or on the price label.



Price discounts may be offered occasionally, particularly for products purchased in bulk (see below). It is also common to find discounts for fresh fruit and vegetable products sold through e-commerce channels.



Photos © Euromonitor International / Agra CEAS, 2022

### 5.2.3 Offer

#### Domestic production

Switzerland's production of fruit is limited by a variety of factors such as the country's mountainous geography, climate and the small scale size of an average Swiss farm. Apples are the most-produced fruit in the country and are one of the categories for which Switzerland relies less on imports. Around 6 000 hectares of land in Switzerland is dedicated to the production of fruit, with apples accounting for around half of this land area. Around 400 hectares are dedicated to the growth of raspberries, chokeberries and blueberries, while strawberries are grown on around 500 hectares.<sup>45</sup> On average, Switzerland produces around 7 000 tonnes of strawberries and 3 000 tonnes of blueberries. Carrots are the most produced vegetable product in Switzerland with carrots being in season year-round in Switzerland. Tomatoes are the second most-produced vegetable product with domestic production of production doubling between 2010 and 2020. Switzerland also produces a notable amount of lettuce, cabbage, onions and cucumbers.

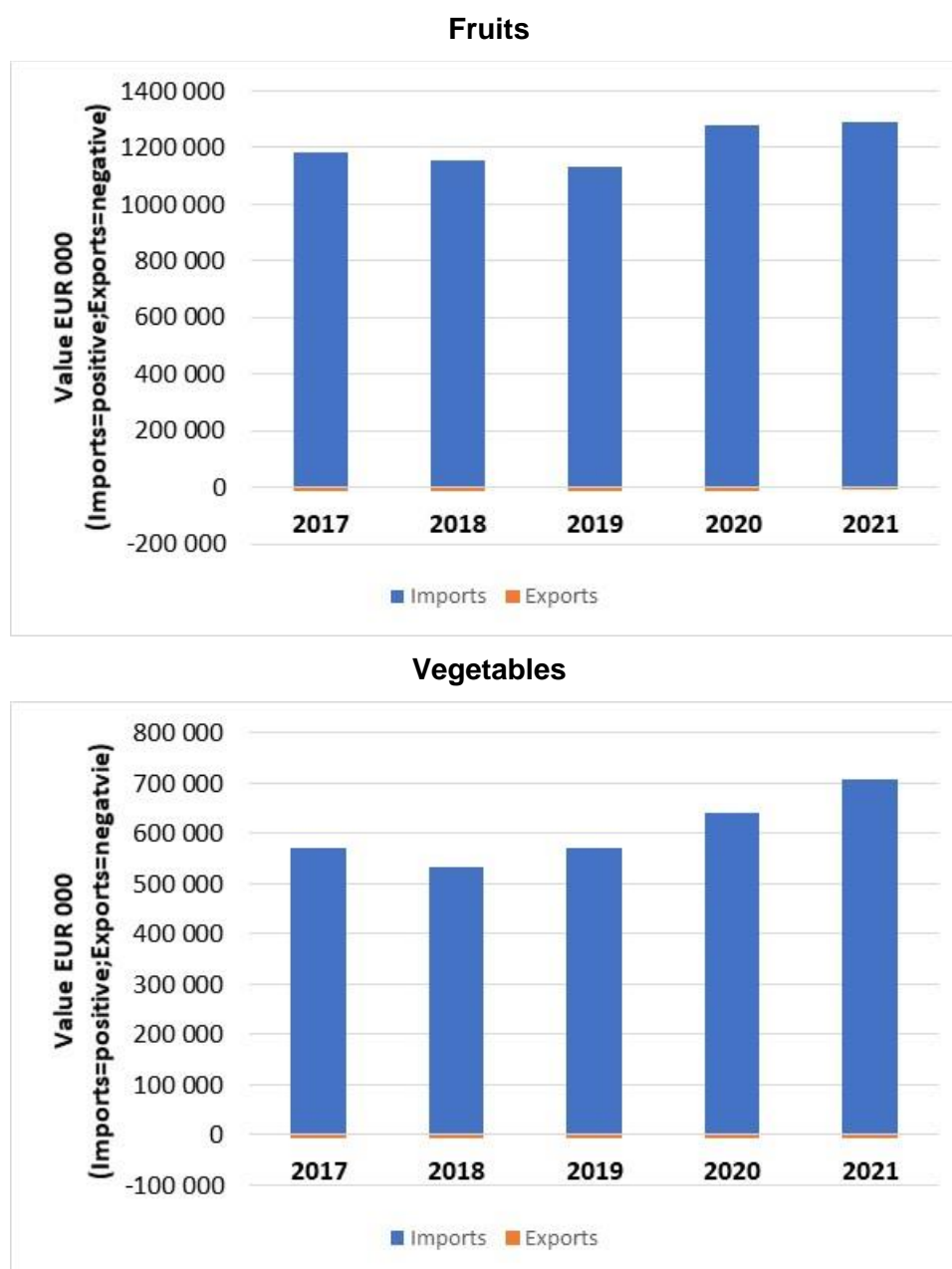
#### Imports and exports

As Figure 5-7 shows, Switzerland has a large trade deficit in both fruit and vegetable products, the country realises on imports of both these products to cater to domestic demand and also to have access to niche fruit and vegetables which are not grown to scale in Switzerland such as bananas, citrus fruits and berries. Switzerland imported roughly EUR 1.2 billion worth of fruits in 2021 which was an increase of EUR 200 million from the EUR 1 billion figure recorded in 2017. This further reflects a rise in demand for fruits in the country coupled with the lack of capacity for domestic production to cater to this demand. Vegetable imports are lower at a value of EUR 700 million in 2021, which represents a five-year high figure as total imports were recorded at EUR 575 million in 2017.

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<sup>45</sup> Swiss Farmers for You, Vegetable and fruit cultivation, Available at <https://www.swiss-farmers.ch/>

**Figure 5-7: Trade balance (imports and exports) of fruits and vegetables in Switzerland, 2016-21; value 000 EUR**



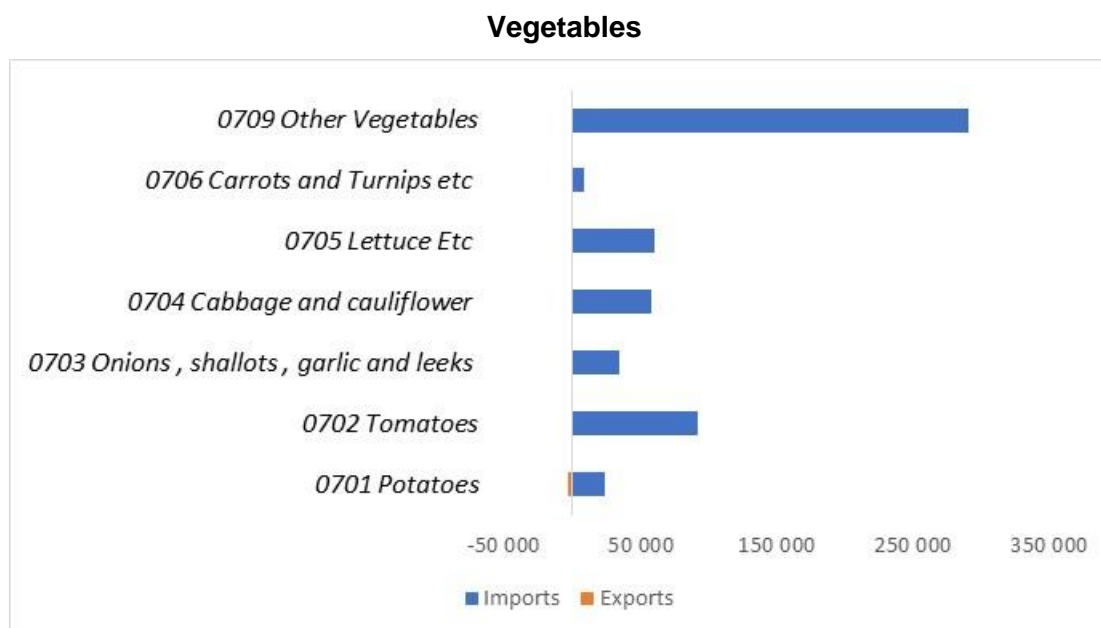
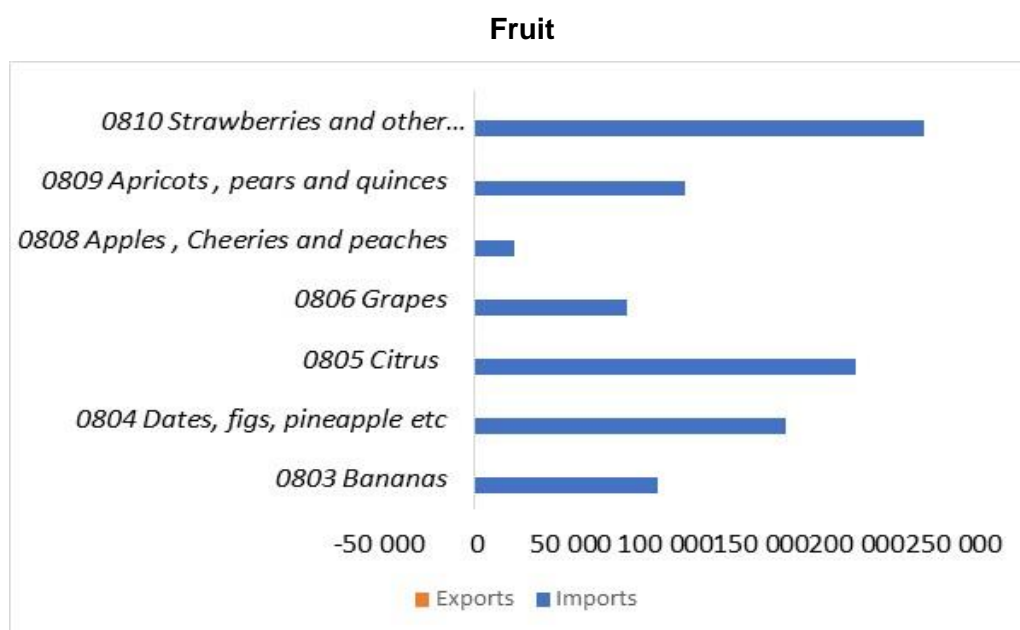
Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN codes 07 and 08.

Figure 5-8 shows which fruits are predominantly imported and exported by Switzerland. As observed, strawberries and other berries are the most imported fruit product in Switzerland with total imports coming to a value of EUR 250 million in 2021. This is followed by citrus fruits with a total import value of EUR 220 million; and dates, figs and pineapple category with a total import value of EUR 175 million. In terms of vegetable product imports and exports, the highest-valued vegetable import was the other vegetable category with an import value of EUR 300 million in

2021. Tomatoes were the second highest with an import value of EUR 100 million followed by lettuce with an import value of EUR 52 million.

**Figure 5-8: Swiss trade balance of fruit and vegetables by type, 2021 (value 000 EUR; selected types only)**



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

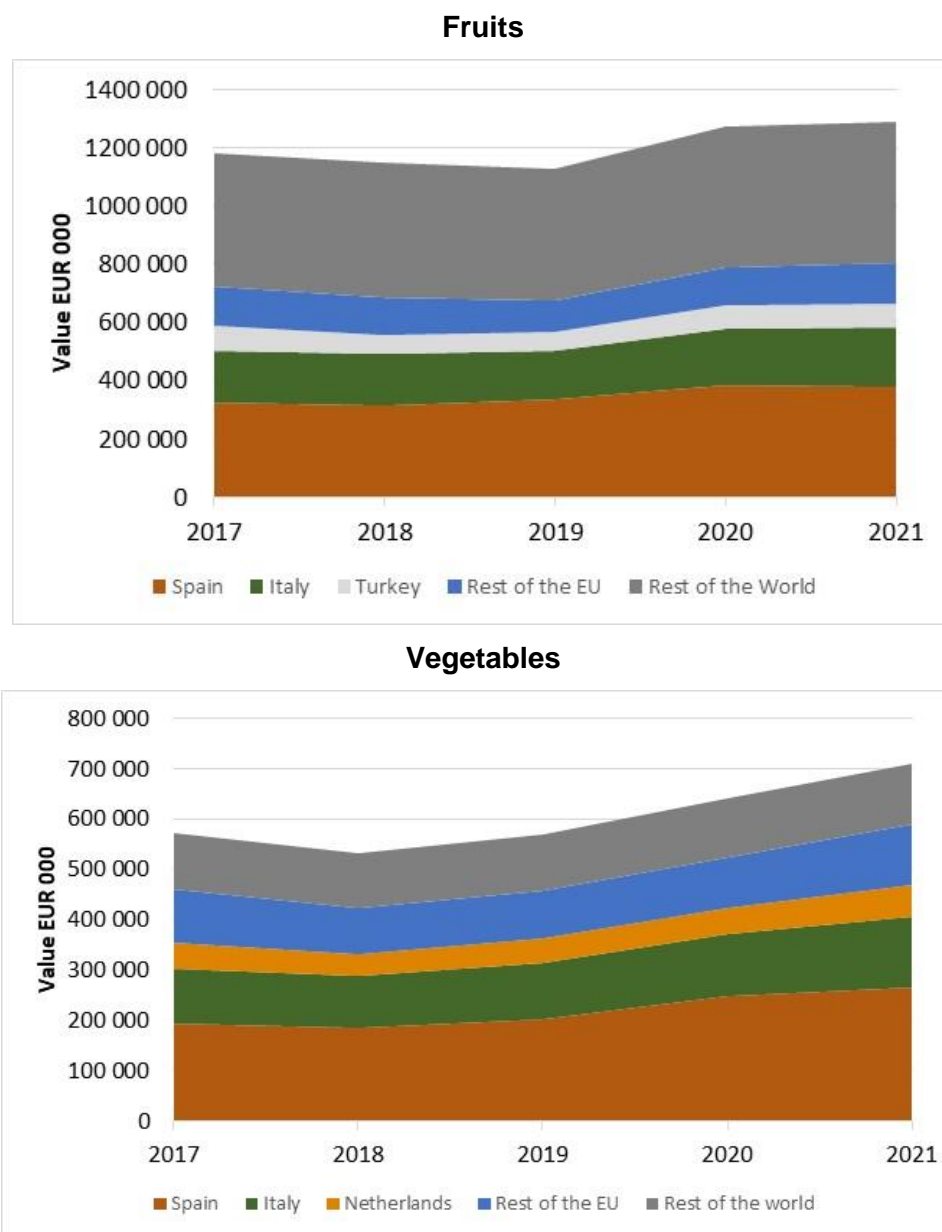
Note: names for CN codes are abbreviated in most cases.

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 Switzerland followed by Italy and Turkey. Spain sent a total of roughly EUR 400 million worth of fruit to Switzerland in 2021 with citrus fruits accounting for a large percentage of these exports. Italy exported roughly EUR 120 million with strawberries and other berries accounting for a large percentage of this.

Spain and Italy are also the largest vegetable exporters to Switzerland with the Netherlands being the third largest exporter. Overall, the EU as a whole account for roughly half of the fruit exports to Switzerland and just over three-quarters of vegetable exports to the country.

**Figure 5-9: Swiss imports of fruits and vegetables by country, 2017-21; value 000 EUR**



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

Data for CN codes 07 and 08.

## EU GI products

As noted in section 4.2.4, EU fruit and vegetable products with GI protection are further granted full protection in Switzerland.

## Main competitors

The main competition for EU fruit and vegetable products comes on one hand from a combination of certain domestically produced products such as Swiss apples, certain berries, carrots and potatoes. However, overall Switzerland remains a large net importer of fruit and vegetables; and therefore on the other hand some third countries such as Turkey also provide competition. While there is some competition e.g. from Latin American countries, the difference in seasonality means that EU imports are not in direct competition with these products.

### 5.2.4 Specific market entry requirements

#### Market Access and Entry.

Importer and exporters of many fruit and vegetable products need to be registered with the intra-European TRACES database. A phytosanitary certificate and a plant passport is generally required, as is a permit to market plants by the importer.

Import tariffs vary depending on the product and the time of year. The link below should be consulted for more details.

**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 – citrus fruit category (0805) from Spain to Switzerland***

[Results | Access2Markets \(europa.eu\)](#)

#### Standards, SPS measures; labelling

As noted in section 4.2.1, there are no SPS checks between Switzerland and the EU, as such, fruit and vegetable products can be exported or can be transited through Switzerland without any border checks. The EU and Switzerland have mutual recognition of organic products within both markets.

### 5.2.5 Distribution

The main retail channels for fruit and vegetables in Switzerland are:

- ***Supermarkets and grocery stores.*** These account for the majority of fresh fruit and vegetable distribution through retail. The key chains, Migros and Co-op account for most supermarket sales, though fresh produce can be found in other supermarket chains such as Denner, Spar, Volg, and Prodega. Urban Denner stores in particular tend to offer fresh produce at prices slightly below that of the big two chains; though small supermarkets in

rural areas (many of which belong to the Spar chain) tend to offer produce at a slight price premium.

- **Discounters**, for example Lidl and Aldi tend to sell fruit and vegetables at slightly lower prices than supermarkets but offer a narrower product range.
- **Speciality and organic stores**. These tend to either sell more specialist / exotic products and / or organic products. The quality of produce sold through this channel tends to be particularly high.
- **Farm stalls**. Some producers sell straight to the public through farm stalls. There are websites which also facilitate such direct sales (e.g. agriculture.ch and farmy.ch).
- **Food co-operatives**. Following on from the previous channel, some farmers group together in co-operatives in order to sell directly to the public.

## 5.2.6 Challenges for EU products

Overall, Switzerland is an attractive and fairly trouble-free market for EU fruit and vegetable products. The country is geographically close with a structural deficit, and Switzerland's single market integration means that products can be easily sent to the country. The main challenges EU product are likely to face are related to competition from domestically produced apples, carrots and potatoes coupled with the imports of fruit and vegetable products from third-country markets such as Morocco and Turkey.

### Market Takeaway: Fresh fruit and vegetables

**Consumption:** Consumption of fruit and vegetables is on par with European levels and is forecasted to continue growing across virtually all major fruit and vegetable categories. Swiss consumers of fruit and vegetables can come from any age group with older consumers, in particular, consuming a large amount of fruit and vegetables on average.

**Competition:** Domestic carrots, apples and potatoes are the biggest competition for EU producers, coupled with fruit and vegetables arriving from Morocco and Turkey.

**Distribution:** supermarkets and grocery stores have a strong position, though there are also some specialist stores plus direct-to-consumer selling by farmers and co-operatives.

**Challenges:** Generally an attractive and fairly trouble-free market, though competition from certain Swiss-produced fruit and vegetables and some third countries may pose challenges.

**Opportunities:** A forecasted positive growth rate across most major fruit and vegetable categories presents a market which is growing and attractive for EU producers. Organic products in particular show potential.

## 5.3 Dairy

### 5.3.1 SWOT analysis

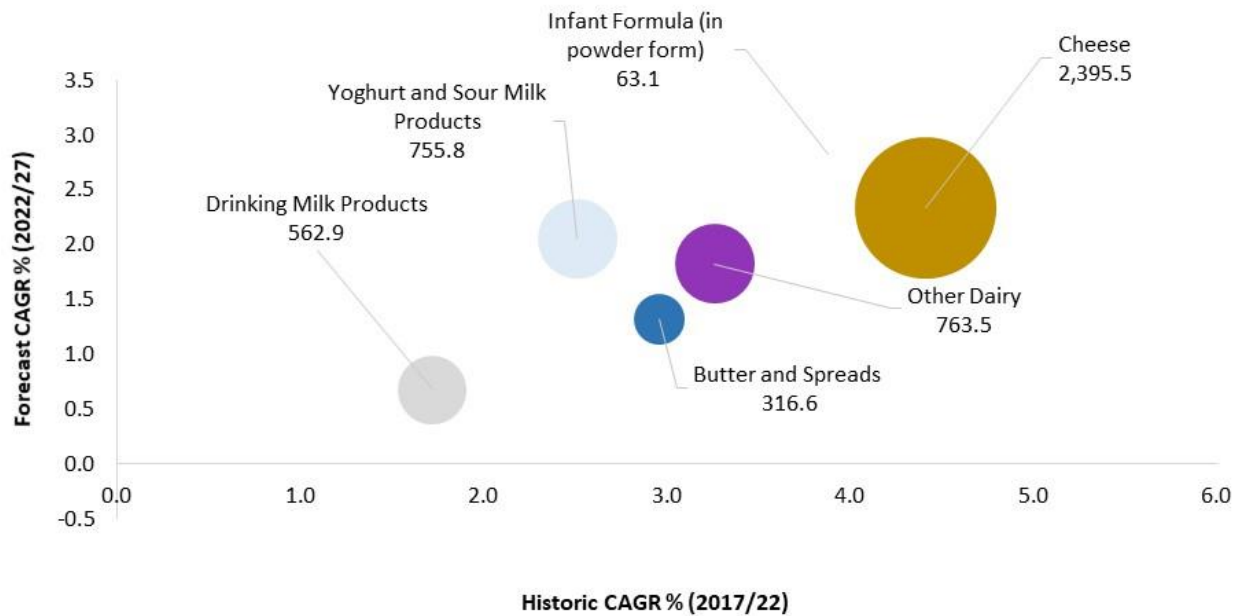
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> <li>▪ The strong culinary and social culture of producing and consuming dairy products such as cheese and milk.</li> <li>▪ The EU accounts for the majority of dairy exports to Switzerland across multiple categories including milk, cheese and yoghurt.</li> <li>▪ EU cheeses in particular are held in high regard in Switzerland and suffer less from consumer demand for Swiss-produced dairy products than cheeses of other origins.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Overwhelmingly, Swiss consumers have been shown to prefer dairy products that have been produced in Switzerland.</li> <li>▪ Switzerland is effectively more or less self-sufficient in dairy products; the markets for most products are almost in equilibrium (exports = imports), and in the case of cheese it is a major net exporter.</li> </ul>
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> <li>▪ Shortfalls in the domestic production of butter have caused the Swiss government to increase imports of this product, total imports rose from EUR 400 000 in 2018 to EUR 19.3 million in 2021 and will likely continue to grow.</li> <li>▪ Certain EU-produced cheeses suffer less from the perception of being of a lesser quality than Swiss-produced cheese which is often the case for other dairy products, as a result, EU cheeses are more readily sought out by Swiss consumers.</li> <li>▪ Organic dairy products continue to see a rise in demand as consumers increasingly become more health-conscious and have greater concerns about the environment.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Swiss production of organic dairy products continues to grow with producers in the country seeking to cater to the rising demand for organic dairy products.</li> <li>▪ The Swiss dairy farming union is strong and is quick to respond to potential threats to domestic dairy production, such as organising protests at cheese-producing factories that have even suggested using imported milk in their production practises.</li> <li>▪ A strong culture of dairy production makes it more difficult for EU dairy products to leverage their high quality in Switzerland when compared to entering other third-country markets.</li> </ul>

### 5.3.2 Consumption

#### Evolution of consumption

Figure 5-10 below shows the various retail values of markets for different dairy products in Switzerland. Cheese is the largest dairy product by retail value, with a market value of EUR 2.3 billion. Cheese grew by a CAGR of 4.4% between 2017 and 2022. However, this growth rate is expected to decline to 2.3% per year between 2022 and 2027. Other dairy products are the second-largest market by retail value at EUR 763 million. The other dairy products market is forecast to have a CAGR of between 2022 and 2027 of 1.8%. Yoghurt and sour milk products are valued at EUR 755 million with drinking milk products valued at EUR 562 million, butter and spreads at EUR 315 million and finally infant milk formula at EUR 63.1 million. All dairy products are expected to see growths in retail value between 2022 and 2027 with drinking milk products growing the slowest.

**Figure 5-10: Evolution and forecast of the dairy market (retail value, EUR millions) in Switzerland, 2017-2027**



Source: Euromonitor International: Packaged Food, 2022.

## Consumer profile and purchase criteria

### Consumers

Consumption of dairy in Switzerland is generally high across most products, even by European standards. Switzerland is amongst the higher per capita consumers of products such as milk, cheese and butter globally, below is a further breakdown of consumers types by dairy product.

- **Milk:** As stated above, milk consumption per capita in Switzerland is quite high with the figure hovering around 53.2 kg per capita. Younger consumers are exposed to fresh milk products at school via free milk programmes at school and there is an association of milk as an important product for the development of children in Switzerland. Middle-aged consumers are also large consumers of milk due to the perception of it being a healthy and high-quality product, older consumers (aged 65+) are noted as consuming slightly less milk on average.
- **Cheese:** Consumption of cheese in Switzerland is very common and constitutes a large part of the local diet and social traditions (such as having a *raclette*). Virtually all consumers of various income and age groups consume cheese in Switzerland with fondue and raclette being the typically more famous cheeses consumed in the country. Swiss consumers are accustomed to having a wide variety of both hard and soft cheese available to them which helps cater to a wide variety of consumers with different tastes and purchasing criteria. With an overarching preference for domestically-produced cheese, the main imported cheese consumers are more commonly expats or Swiss nationals with origins from EU member states. Nonetheless, some imported cheeses such as feta and mozzarella are popular among Swiss consumers more broadly due to their unique qualities and uses.

- **Butter and spreads:** Consumption of butter is overall lower than the aforementioned milk and cheese products. Nonetheless butter consumption remains common in Switzerland with consumers of all age groups and income classes consuming butter and spreads regularly, with consumption of butter per capita in Switzerland of butter being amongst the highest in Europe.
- **Yoghurt:** Consumption of plain yoghurt in Switzerland is common with consumers appreciating the versatility of this product – it is often consumed with additional ingredients such as honey or fresh fruit. Overall, in Switzerland, middle-aged (35-60) consumers are the largest consumers of yoghurt with the product complimenting the busy work lives of this consumer group in particular.
- **Other dairy:** The other dairy product appeals to consumers of coffee and other food and beverages which incorporate cream. Swiss consumers are amongst the largest consumers of coffee in the world per capita which compliments the use of some products from the other dairy category in the country.

### Drivers and method of consumption

Overarching drivers of dairy consumption that stand out are the use of dairy products in many traditional Swiss meals and social settings coupled with dairy products in the country being perceived as of a high quality. A further breakdown of drivers and methods of consumption by dairy subcategories is shown below.

- **Milk:** Cow milk is the most consumed milk in the country and has grown to become a synonymous symbol of the country with the Swiss cow being used on many infographics and advertising campaigns produced by the Swiss government. Swiss consumers had been consuming less milk overall in recent years as consumers increasingly went without consuming a breakfast meal coupled with living busier lifestyles. However, this trend was reversed during the outbreak of COVID-19 as consumers increasingly worked from home and hence had time for baking and other activities; increasingly some of these practises have been retained even after COVID-19 restrictions have been lifted which has helped to sustain milk sales in Switzerland. Swiss consumers tend to consume milk throughout the day with milk being a common drink consumed with breakfast and dinner meals.
- **Yoghurt:** Yoghurt consumption in Switzerland grew during the COVID-19 pandemic due to a combination of factors such as staying at home to work, reduced commuting and the perception of yoghurt as being a product that is healthy and nutritious. Yoghurt also benefits from its versatility concerning the incorporation of additional foods such as fresh fruit. Increasingly, Swiss consumers are looking for yoghurts with healthier ingredients and have been shown to be willing to pay the extra costs to purchase these yoghurts. Younger consumers often consume yoghurt as a breakfast or lunch snack while older consumers generally perceive it more to be a healthy desert food after dinner meals.
- **Cheese:** cheese is a compliment to many Swiss meals and social traditions and is a product that is held in high regard and a source of pride for many Swiss consumers. Swiss consumers are drawn to many cheese varieties including alpine cheeses, hard cheeses and soft cheeses. Some of the more recognisable cheeses across Europe are of Swiss origin such as Emmental cheese, Gruyere and Appenzeller; and this further acts as a source of pride for Swiss consumers. Social traditions such as cheese-making events and having fondue and a raclette during the winter months act as key drivers of cheese consumption in Switzerland.

- **Butter and spreads:** The outbreak of COVID-19 led to a direct increase in butter sales in Switzerland as consumers increasingly baked at home. Even as COVID-19 restrictions have now been lifted the trend of home baking has remained popular and has helped to sustain growth in the sales of butter in Switzerland. Swiss consumers, however, are increasingly health conscious - particularly post-COVID-19 – and this is resulting in an increasing demand for organic butters which is a key driver of total butter sales in the country. Butter and spreads are often consumed in the morning or afternoon as a compliment to breakfast and lunch meals although dinner meals such as *Rösti* (which is often considered a national dish of the country include the use of butter in the preparation process).
- **Other dairy:** Fromage frais and quark are by far the largest category within the wider other dairy category and have particularly been benefitting from the rise of working due to COVID-19. These types of products are perceived as healthy and thus align with consumers' heightened health and wellness interest in Switzerland. Swiss consumers also often use the product in the preparation of food. Cream is also popular in Switzerland and is a key compliment to coffee with is heavily consumed in Switzerland.

### Purchase criteria

In line with the general situation for dairy in Switzerland, organic status and origin (preference for Swiss) are frequent considerations for consumers of dairy products, with a strong importance placed on the grass-fed nature of Swiss cows. Looking more specifically on a product-by-product basis:

- **Milk:** Consumers in Switzerland will often seek Swiss-produced milk products as consumers appreciate the “Swissness” of their milk product which brings connotations of high quality and nutrition. The association of the dairy cow as a mascot of many aspects of the Swiss lifestyle further endears the animal and by extension domestic milk as a product. Older consumers in particular have been shown to be particularly concerned about high milk consumption in relation to cholesterol levels and as a result, will likely buy smaller cartons of milk, older consumers are also further seeking out ultra-high temperature processing (UHT) milk products in Switzerland due to the growing perception of this milk product having a high nutritional value. Increasingly organic milk is being sought out by consumers which further aids domestic producers which already have the capacity to produce organic milk to scale.
- **Yoghurt:** As with milk, the “Swissness” of yoghurt is appreciated by consumers who perceive domestically produced yoghurts to be of a high standard making it additionally difficult for imported yoghurts to stand out on the aisle of Swiss retailers. Swiss consumers further increasingly seek out yoghurts which have been made from natural ingredients and contain additional offerings such as fresh fruit.
- **Cheese:** Swiss consumers have high expectations around the quality of the cheese they are purchasing, indeed a culture of cheese consumption coupled with the production of many high-quality cheeses within the country has brought with it the perception of cheese as a high-quality product. Swiss consumers appreciate certain foreign cheeses with heritage from countries such as Greece, France, Italy and Germany which means the desire to have a domestic version of cheese is somewhat less profound compared to other

dairy product categories. Nonetheless, the grass-fed status of Swiss cows combined with high artisanal production and the use of unpasteurised milk in the production process means that there is nonetheless an overarching preference for domestic cheese; around two-thirds of Swiss residents believe cheese from Switzerland to be better than imported cheese.

- **Butter and spreads:** In recent years Swiss consumers have grown more accustomed to using and consuming imported butters as a shortage of butter in Switzerland as a result of high demand and lower production resulted in the country needing to drastically increase imports of butter in recent years. However, when available, Swiss consumers will still generally prefer to purchase domestically produced butter due to the perception of it being a high-quality product and historically it has been priced more attractively than imported butters. Swiss consumers appreciate organic butter which is seeing particularly strong growth as Swiss consumers see it as being healthier and of a higher quality. Swiss consumers are also showing strong interest in premium products with butter produced in the Swiss Alps ("*Beurre de Montagne*") being especially popular
- **Other dairy:** Consumer purchasing quark like many other dairy products will appreciate those products that are produced in Switzerland. Certain other dairy products such as cream and chilled deserts have suffered from an increasing image of being unhealthy which is resulting in increasing innovation in these two product sector areas concerning the product of products with less sugar and more natural ingredients which is increasingly important for Swiss consumers.

### Recent market trends

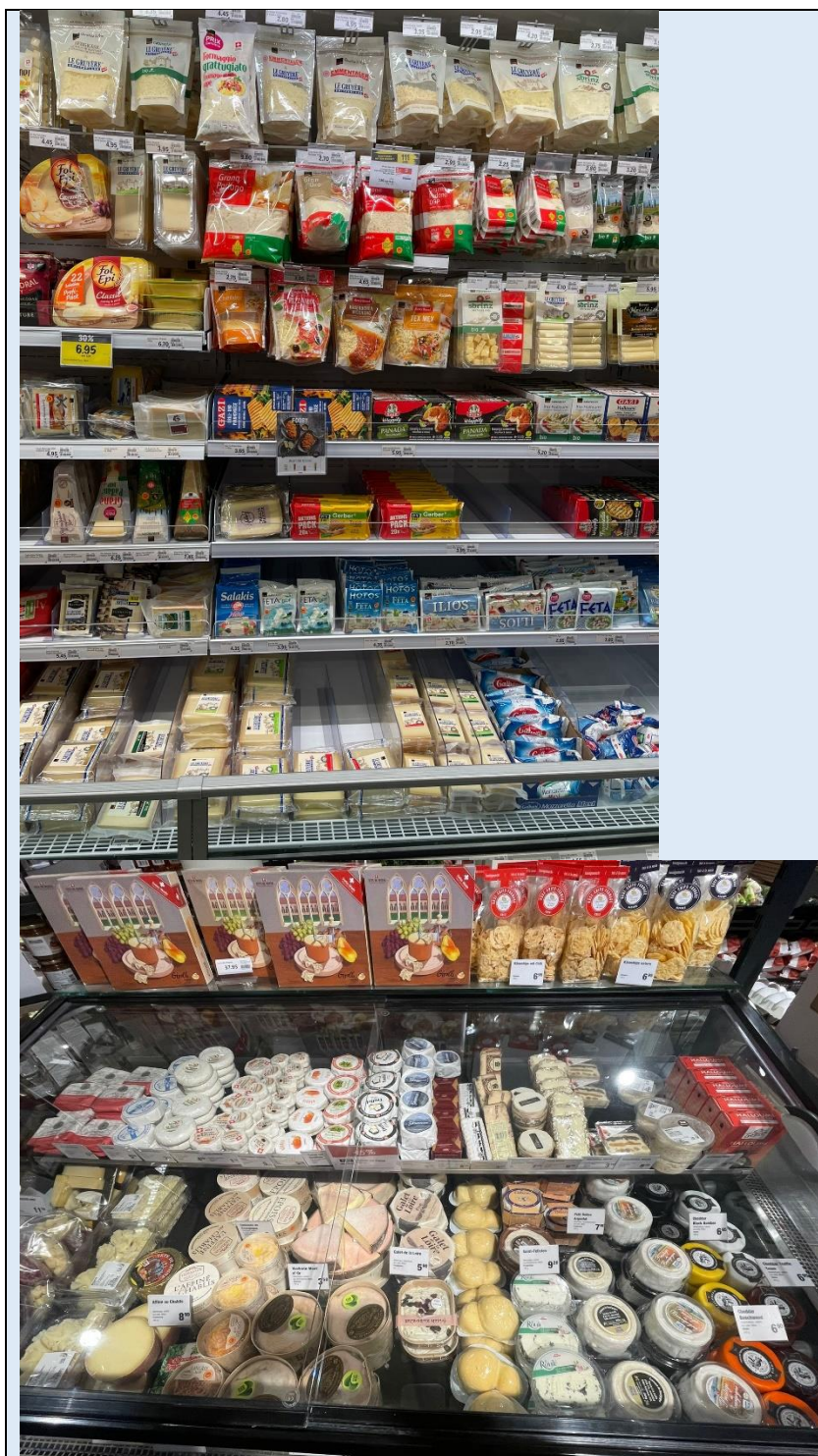
Prior to the outbreak of COVID-19 in Switzerland, there was a notable total decline in consumption of milk, yoghurt and cheese which was largely reversed as consumers spend more time in the home. During this period the use of these products in home baking grew to a level that offset many of the declines felt by the closure of the on-trade food sector. Swiss consumers who were already very health conscious before COVID-19 now increasingly seek out dairy products which have been organically produced; incorporate additional offerings (such as fresh fruit)' are niche (such as goat milk); and overall have been produced in Switzerland. Swiss perceptions of imported butter in recent years have grown positively as this product has been increasingly imported by the country to make up for shortfalls in domestic production making it insufficient to meet demand. Despite this being the case for butter and spreads and also cheeses, across other dairy products the desire to purchase domestically-produced products remains strong making it hard for imported milk, yoghurts and quark products to compete with domestic variants of these products. Going forward innovations relating to organic production practises, the use of natural ingredients and the offering of additional food items will mark the key criteria's seeking sought out by consumers.

#### Dairy products on retailers' shelves in Switzerland

Cheese prices vary depending on the cheese type, but as a very broad rule, cheese in the economy segment retails for CHF 15 per kg or less; with mid segment cheeses selling at between CHF 15 and 30 per kg. Butter generally retails at between CHF 2.50 and 4 for 250 grams.

Plastic packaging is widely used for cheese products, with stand up plastic pouches becoming increasingly popular for soft and shredded cheeses. Butter tends to come either in foil paper or rigid plastic containers. However, with sustainability on the agenda of the Swiss, consumers will pay attention to the sustainability message that packaging communicates. Packaging which can be recycled and/or packaging made from recycled materials tend to be favoured.

*Below: cheese selections in two major supermarkets. Plastic packaging is widespread, though some products are using cardboard / paper to stand out. Some products are available in multiple different pack sizes.*



Pack sizes for cheese vary. A desire for portion control coupled with an increasing number of single or two person households results in a fairly high popularity of smaller pack sizes; it is very common to find cheese in packs of between 200 and 300 grams. This trend also exists to an extent in the butter market, though 250g and 500g packets are the standard.

*Below: butter selection in a supermarket. Products with organic status have this clearly highlighted both on the packaging and next to the price (see close up on the right).*



In addition to sustainability credentials, consumers will use packaging to assess the origin of dairy products. In discounters in particular, where there are a higher number of imported products, it is common to see the Swiss flag next to products to indicate their Swiss origin. Geographical indications may be seen on some cheeses.

*Below: cheese selection in discounters. Swiss flags can be found on the boxes/packaging and next to the price in order to highlight the cheeses which are Swiss in origin.*



### 5.3.3 Offer

#### Domestic production

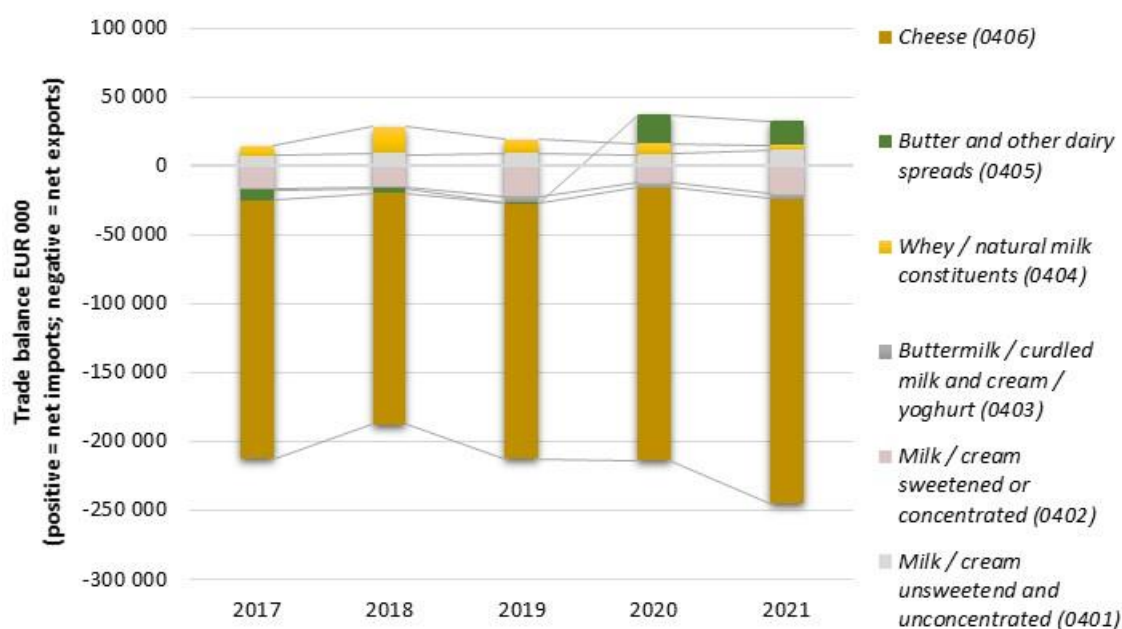
Swiss domestic production of dairy products is strong with dairy being one of the largest sectors in the Swiss agricultural production sector. In relation to milk production, there are an estimated 20 000 dairy farmers in Switzerland taking care of roughly 560 000 cows which produce 4 billion kg of milk annually. Switzerland is also home to a variety of unique breeds of dairy cows that aids production such as the Swiss Fleckvieh and Swiss Holstein; both of which produce high yields of milk. Milk produced in Switzerland also sustains the country's cheese sector with around 200 000 tonnes of cheese being produced in Switzerland in 2021. Cheese is one of the premier agricultural export products of Switzerland and is produced throughout the country with many regional varieties existing such as *Ticino Alpkase* and *Raclette du Valais*. It is estimated that some 70% of the cheese produced in the country can be classed as artisanal.

Switzerland is also a large producer of yoghurt, though a large amount of the yoghurt produced in Switzerland is consumed in the country rather than exported. Switzerland has a production shortage in butter requiring the government to step in to increase imports from abroad. This is due to a combination of factors including: a falling number of dairy farms; the majority of Swiss milk being utilised for the production of cheese rather than butter; increasing overseas demand for Swiss cheese; and butter being less economically lucrative for producers when compared to milk and cheese. As a result, butter is one of the key products in which imported dairy products can compete even if there is still a large desire among Swiss consumers to purchase Swiss dairy products.

## Imports and exports

As shown in Figure 5-11 outside of cheese and to a more limited degree butter and spreads, Switzerland is neither a large importer of exporter of most dairy products. This is a reflection of the strong domestic production and a market which is scaled to cater to domestic demand rather than for large scale export (with the exception of cheese). As stated previously, Swiss consumers appreciate the “Swissness” of dairy products and hold domestically produced dairy products in high regard which limits demand for imported dairy products such as yoghurt and milk. Butter shortages in 2019 resulted in a spike of imports largely from EU member states and continue to represent an opportunity area for EU dairy producers seeking to enter the domestically oriented Swiss dairy markets.

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



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

CN codes in brackets.

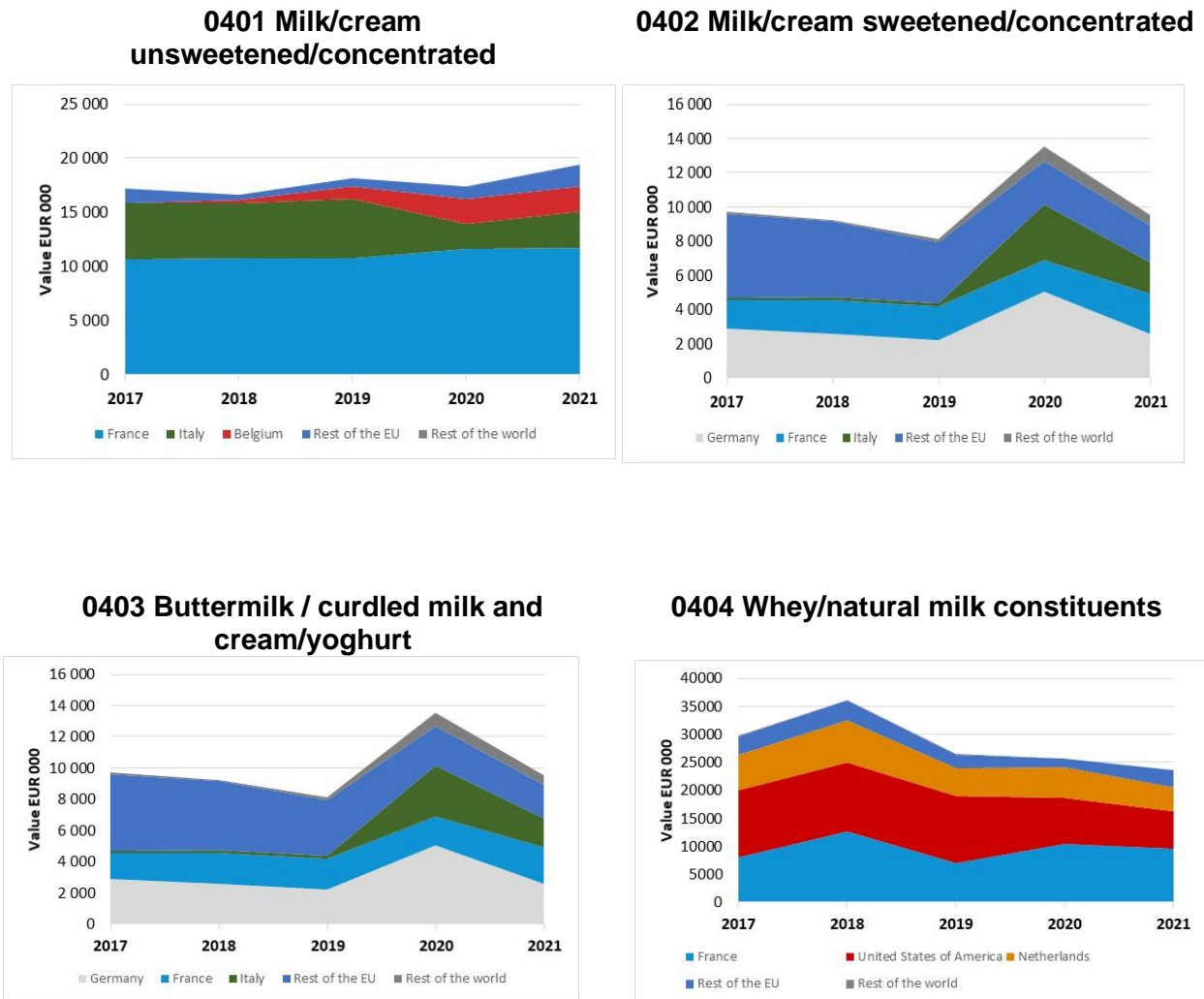
In terms of the origins of imports, the EU is an important origin of imports for multiple categories. More specifically, as shown in Figure 5-12:

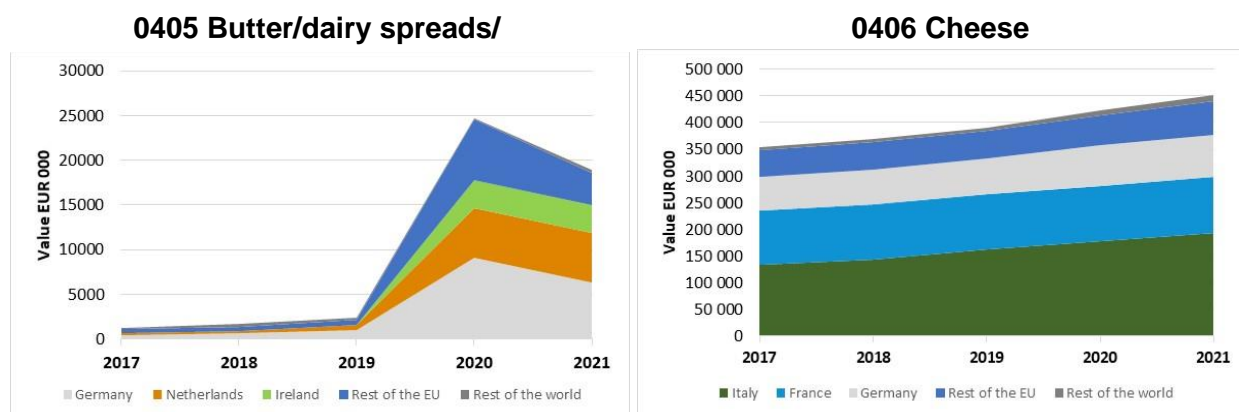
- **Sweetened/concentrated milk/cream:** The EU accounts for virtually all of the sweetened/concentrated milk/cream imported by Switzerland with France, Italy and Belgium being the largest exporters of this product to Switzerland. Total imports however are small with Switzerland importing just under EUR 20 million worth of sweetened/concentrated milk/cream in 2021.
- **Unsweetened/unconcentrated milk/cream:** Unsweetened/unconcentrated milk/cream imports are even smaller than sweetened and concentrated variants of milk and cream with a total import value of just under EUR 10 million in 2021. The EU accounts for the absolute majority of exports of this product to Switzerland.
- **Buttermilk, curdled milk and yoghurt:** The EU accounts for almost all exports of buttermilk, curdled milk and yoghurt to Switzerland although total imports are small at a

value of EUR 13.8 million the majority of which originates from Germany, Austria and Belgium.

- **Whey and natural milk constituents:** The trade of whey and natural milk constituents is more competitive than other dairy product exports with the USA being the second largest exporter of this product to Switzerland. Despite this, the EU still accounts for the majority of exports.
- **Butter/dairy spreads:** Domestic supply issues in 2019 resulted in the Swiss government proactively seeking butter from abroad to make up for production deficits in its domestic market. Germany, Netherlands and Ireland have emerged as the biggest exporters of butter and dairy spread to Switzerland with total exports growing from a figure of EUR 400 000 in 2018 to EUR 19.3 million in 2021.
- **Cheese:** The trade of cheese accounts for the absolute majority of dairy products both imported and exported by Switzerland and is the key opportunity area in the Swiss dairy market as consumer hold cheeses from countries such as Italy, France and Germany in high regard and on par with domestic cheeses. In 2021, Switzerland imported EUR 400 million worth of cheese with the EU being by far the largest exporter of cheese to the country.

**Figure 5-12: Swiss imports of different dairy categories by country, 2017-21; EUR 000**





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, EU dairy products with GI protection are further granted full protection in Switzerland.

## Main competitors

Swiss domestic producers are the largest and main competitor to EU dairy products in Switzerland. Consumers appreciate dairy products that have been produced in Switzerland which makes it additionally difficult to market imported dairy products to Swiss consumers. Swiss consumers are slowly growing to appreciate imported butter and spreads due to domestic shortages in production. The quality of EU cheeses in the EU from well-known producers such as France and Italy also helps to sustain sales of EU dairy products in Switzerland. Outside of butter and cheese, the Swiss dairy market is quite difficult to enter due to the country being a large producer of high-quality dairy products in its own right.

### 5.3.4 Specific market entry requirements

#### Market Access and Entry

Dairy establishments must be registered with the intra-European TRACES database before being exported to Switzerland. A veterinary health certificate for animal products is also needed. For dairy products which do not conform with the requirements of the TRACES system, an import permit for animal products that do not entirely satisfy the import conditions is needed.

**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 Spain to Switzerland***

[Results | Access2Markets \(europa.eu\)](#)

#### Standards, SPS measures, labelling

The EU and Switzerland share a common SPS area which results in SPS checks being abolished at the border between both markets.

Dairy products must conform to the labelling requirements for packaged foods set out in section 4.2.3.

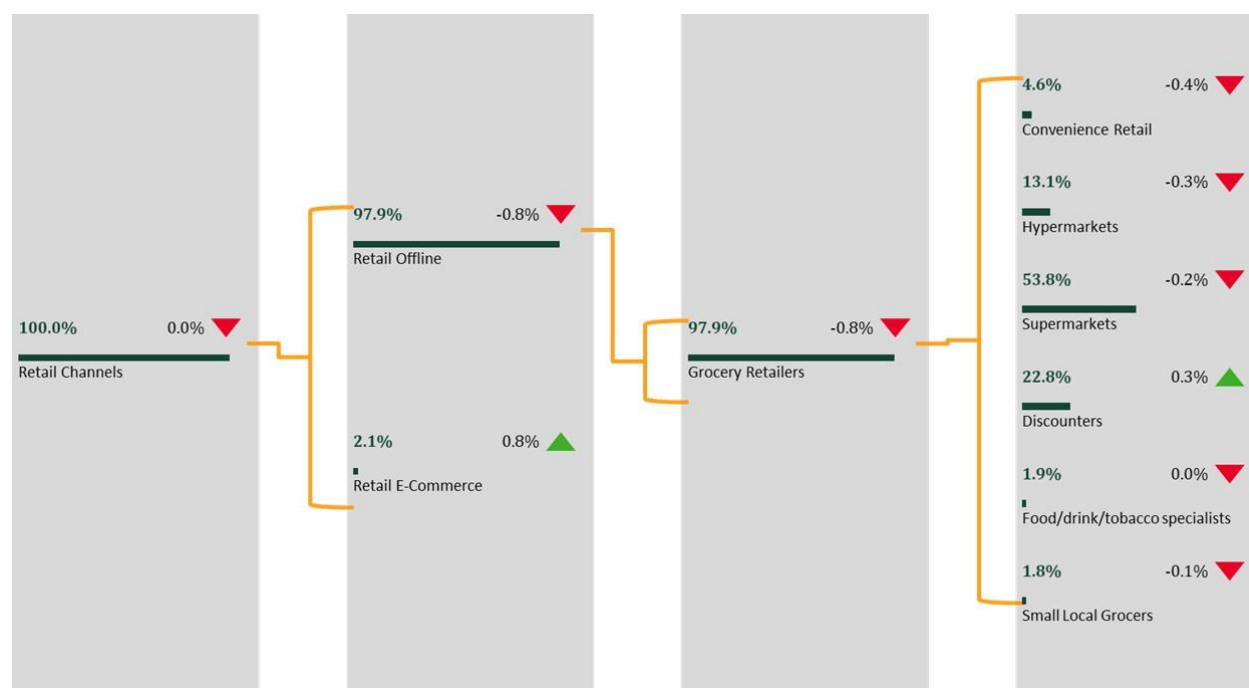
### 5.3.5 Distribution

Grocery retailers account for 97.9% of the retail distribution of dairy; with supermarket retailers accounting for just over half of sales with a share of 53.8% of sales. Discounter retailers account for just 22.8% of sales as shown below in Figure 5-13. Overall, there is little difference in distribution channels for individual products, with the share of supermarkets, discounters and hypermarkets around these levels across all product categories. The e-commerce share of cheese is slightly less than that of dairy as a whole at under 1%.

Imported dairy products of all types are much more likely to be found in modern retail channels (hypermarkets and supermarkets in particular) with notable retailers such as Migros and COOP being those that should be targeted by prospective producers seeking to enter the Swiss market. Also, gourmet groceries (particularly in larger cities) and, to some extent e-commerce channels are other notable channels that can be utilised to enter the Swiss market.

Overall, the retail channel accounts for around 80% cheese and butter distribution by volume; with food service accounting for the remaining 20%. Mozzarella is by far the most commonly-used cheese in food service channels due to its use on pizza and in salads; it accounts for almost 40% of cheese usage through food service channels.

**Figure 5-13: Distribution channel overview of dairy in Switzerland (2022); all dairy products; retail value**



Source: Euromonitor International: Packaged Food, 2022.

### 5.3.6 Challenges for EU products

Swiss consumer perception of domestically produced Swiss dairy products combined with Switzerland itself being a large producer of dairy products are the biggest challenges for EU exporters seeking to export dairy products to Switzerland. EU dairy exports are concentrated on the exports of cheeses (mainly premium high-end cheeses) and the export of butter as Switzerland has a shortfall in production.

### **Market Takeaway: Dairy**

**Consumption:** *Swiss residents are amongst the highest per capita consumers of butter, cheese and milk globally and are large consumers of other dairy products also. Swiss consumers of these products can come from any income or age bracket as the country has a strong culinary culture tied to the consumption of dairy products (cheese and milk in particular)*

**Competition:** *Domestic producers are by far the biggest competitors for EU producers seeking to enter the Swiss market. Swiss consumers hold domestically produced dairy products in high regard and many will actively seek them out and value them above imported dairy products.*

**Distribution:** *Mainly distributed from modern grocery retailers such as supermarkets and hypermarkets which account for the majority of sales for all dairy products mentioned in the above section. Discounters are another important channel of distribution however are less likely to stock imported dairy products. E-commerce is growing in popularity however total sales via this channel remain small at around 2.1% on average across all dairy products.*

**Challenges:** *Swiss consumer perception of domestically produced Swiss dairy products combined with Switzerland itself being a large producer of dairy products are the biggest challenges for EU exporters seeking to export dairy products to Switzerland.*

**Opportunities:** *Shortages in domestic production of butter combined with Swiss consumers holding certain heritage EU cheeses in high regard are the two main opportunity areas in the Swiss market. Demand for organic dairy products is growing however domestic production of organic dairy products is also largely catering to this growth in demand.*

## 5.4 Wine

### 5.4.1 SWOT analysis

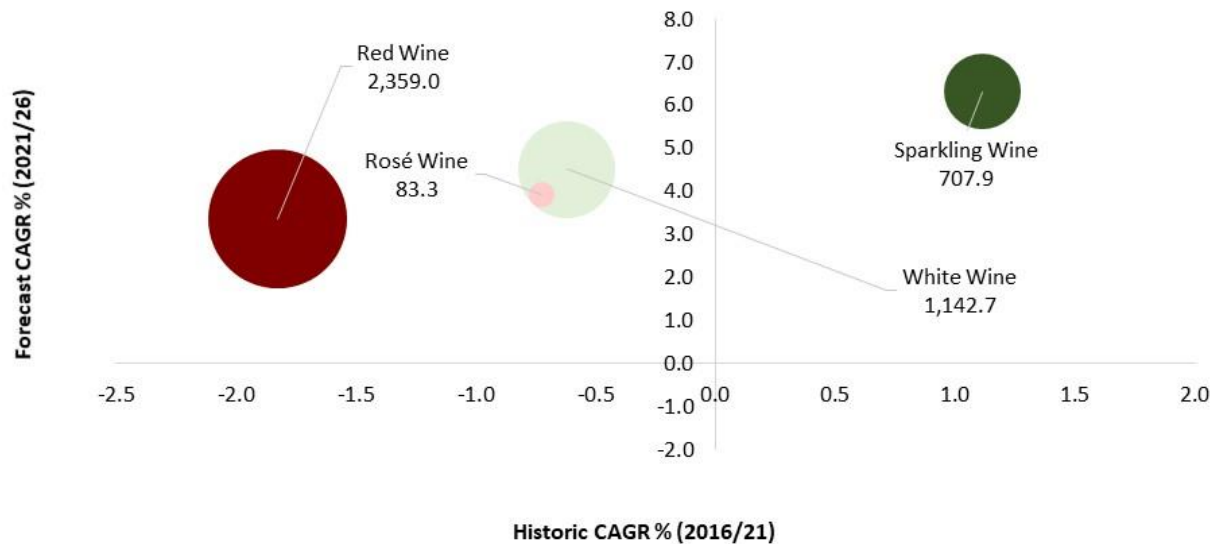
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> <li>▪ The EU is the main exporter of wines to Switzerland by a considerable distance.</li> <li>▪ Per capita consumption is high in Switzerland, only just behind large wine-producing countries such as Italy and France.</li> <li>▪ Brand and product recognition of EU wine products is high.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Perception of Swiss wine as being a more sustainably produced product.</li> <li>▪ Ban on in-store alcohol sales from the large retail chain Migros.</li> <li>▪ Lower-income earners are more likely to consume beer products in Switzerland.</li> </ul>
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> <li>▪ Re-opening of the on-trade foodservice sector.</li> <li>▪ Targeting mid-to-high-end income earners which are the largest consumers of EU wines in Switzerland; most notably with more mature wines which domestic producers struggle to produce.</li> <li>▪ Consumption of wine is slightly higher during the winter months as consumers associate social activities such as having a raclette and visiting Christmas markets with wine consumption.</li> <li>▪ Organic and non-alcoholic wines.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Swiss free trade agreements with large wine-producing countries such as Chile and South Africa.</li> <li>▪ Switzerland does not export a large amount of wine, creating a clear incentive for domestic producers to focus on the domestic market.</li> <li>▪ The Swiss government has given multiple financial aid packages to domestic wine producers to help them sustain production growth.</li> </ul>

### 5.4.2 Consumption

#### Evolution of consumption

In 2021 the total wine market size in Switzerland was worth close to EUR 4.2bn. As shown in Figure 5-14, red wine leads the market. In 2021, the red wine market was worth about EUR 2.35bn, followed by white wine at close to EUR 1.1bn. These two categories together made up around 3/4 of the total market value in 2021. The remaining quarter is made up of sparkling wine, which accounted for close to EUR 707 million and rosé wine with EUR 83m. Going forward, all wine categories are expected to see growth between 2021 and 2026 with sparkling wine being the fastest growing with a predicted CAGR of 6.3% followed by white wine with a predicted CAGR of 4.5%. Red wine will remain the most popular wine in Switzerland with a predicted CAGR of 3.4% between 2021 and 2026. Rose wine will grow at a CAGR of 3.9% however will remain the smallest wine category in Switzerland by 2026.

**Figure 5-14: Evolution and forecast of wine market (million Euros) in Switzerland, 2016-2026; total value**



Source: Euromonitor International: Alcoholic Drinks, 2021.

## Consumer profile and purchase criteria

### Consumers

Wine consumption per capita in Switzerland is high being recorded at around 35.7 litres per person per year which is only just behind large wine-producing countries such as France, Portugal and Italy.

The largest consumers of wine in Switzerland are middle-aged and older consumers of a middle income or higher, as wine is largely imported into Switzerland and costs more than beer and spirit products. The average mid-range bottle of wine costs roughly CHF 13 (EUR 13.32). Consumers in Switzerland are a little more restricted in their ability to source wine products as one of the largest retailers Migros continues to implement a ban on alcohol sales within its supermarkets (and this ban is effectively supported by the Swiss population). As a result, consumers may have to take additional steps to source wine from smaller convenience stores, discounters or other supermarket chains such as COOP (the other major supermarket retailer in Switzerland). It should however be noted that Migros does own the chain Denner which is the second-largest wine retailer and third largest supermarket chain in the country; and in some places, Denner shops are located next to Migros stores.

Wine consumption is particularly high in the west and south of Switzerland as consumers are more influenced by the wine-consuming cultures of France and Italy compared to the more beer-oriented culinary culture found in the north of the country. The west and south are also home to Switzerland wine production base encouraging consumers to try wines via wine tasting events or to purchase wines to help support the local economy. It is important to note that the absolute majority of domestically produced wine is consumed in the country making it less likely to encounter Swiss wines outside of Switzerland and this encourages wine enthusiasts to visit the country with the main purpose of sampling Swiss wine.

With Switzerland having a strong structural shortage of wine and a high level of imports coming from the EU, wine of EU origin is fairly universally consumed by Swiss wine consumers. Nonetheless, there are certain segments which tend to consume imported EU wine to a greater extent. This includes: expatriates; over 45s (who tend to appreciate the complex and mature tastes offered by many EU origin wines); wine connoisseurs; and finally in certain parts of the country, the more price-sensitive consumer who may look for cheaper wines from the EU.

### **Drivers and method of consumption**

The reopening of the food service sector is helping to alleviate some of the declines in total wine consumption in Switzerland in recent years. Swiss consumers are notably dining out slightly more than pre-COVID-19 as consumers seek to return to social activities such as dining at on-trade food establishments, which complements the consumption of wine. Swiss consumers are also increasingly appreciative of wines which have been grown sustainably although this benefits domestically produced wines in particular. Many consumers are increasingly utilising e-commerce as a channel for purchasing wines aided by the outbreak of COVID-19 and the ongoing ban on alcohol sales from the major retailer Migros. Wine is therefore a particular product which has benefited from the rise of e-commerce usage in recent years. Finally, the consumption of wine is slightly higher during the winter months as consumers associate social activities such as having a raclette and visiting Christmas markets with wine consumption.

Wine consumption patterns mirror that found in other European countries, particularly Italy and France with wine being often consumed with large meals such as lunch or dinner meals. The consumption of wine in Switzerland is often also a large social activity and it is very likely that a visitor on business in Switzerland will be offered a glass of wine at some point during recreational activities, in fact refusing a glass of wine without a valid reason can be perceived as rude or inappropriate by Swiss citizens from certain cantons with a wine-producing culture. Swiss wine drinking (and overall alcohol drinking) etiquette usually includes the clicking of glasses and staring into the eyes of the person you are drinking with until the wine is first consumed.

### **Purchase criteria**

As stated, Switzerland produces a variety of wines however these wines are rarely well known amongst the average consumer outside of Switzerland due to the country not being a large exporter of wine. Swiss consumers appreciate Swiss-produced wines for their uniqueness and conations of sustainability and authenticity. Swiss consumers of a higher income will be more likely to seek out imported wines which generally are high-end wines produced in neighbouring France, Italy and in other EU member states such as Spain and Portugal. Swiss consumers associate wine as a luxury premium product and as such will be less attracted to imported bulk wines which are likely to cost around the same as domestically produced premium wines.

Overall, product reputation, origin and production practices (including any ethical production methods) stand as the more important purchasing criteria for Swiss consumers with the origin being particularly important. This is as true for imported wines from the EU as it is for domestic ones. The most respected EU origins tend to be France, Italy and Spain. However, consumers of imported wines will not only take into account the country of origin, but also the heritage of the producer/brand and the quality of the wine (including notably the age of the wine and any aging processes used in production).

Many Swiss consumers will seek out wines produced in their local canton and will view often categories wines produced in other cantons as “imported” wines of sorts; although will continue to appreciate the Swiss quality attached to them.

## Recent market trends

Swiss consumers have increasingly sought out wines via e-commerce channels with an ongoing ban on alcohol sales from the major retailer Migros remaining in place (a decision to uphold the ban via a referendum amongst relevant stakeholders took place in 2022). Switzerland will continue to be a large consumer per capita of various wines with red wine continuing to be the most popular wine variety consumed in the country by 2026 followed by white wine, sparkling wine and finally rose wines. The growth rate of sparkling wines is forecast to be particularly strong as they benefit from the return of celebrations and events following the end of COVID-19 restrictions.

There has been increasing interest in organic wines over recent years, with women particularly interested in this category of product. An estimated 12% of Switzerland's vineyards are registered as organic and producing organic wine, demonstrating the popularity of the product. The prominent organic labels for domestically-produced wine are Vinatura, Bio Suisse and Demter.

Some consumers have also shown greater interest in more mature wine. With limited production capacity in the country, Swiss wine tends to be sold very young. However, consumers increasingly appreciate more mature wines (red in particular). With the difficulties in achieving this for local producers, it is a trend which arguably offers greater opportunities to imported wines than domestic ones.

At the more price-sensitive end of the market, there has been an increased presence of cheaper private label wines on the market – most commonly consumed by younger adults (whether pure, mixed or in cooking).

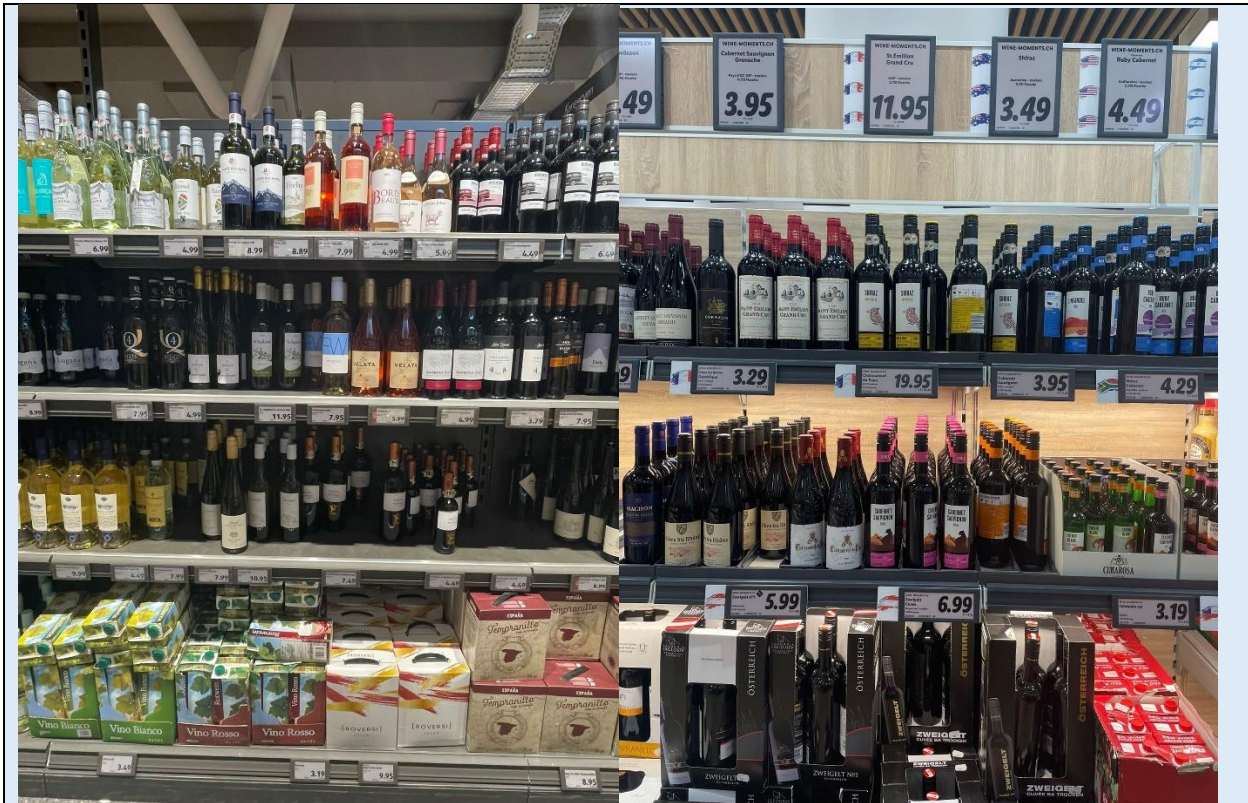
Finally, as is the case in many other European countries, there is increasing interest in no or low alcohol wines. This interest is particularly strong in the young adult (Gen Z) group. Increasing ranges of such products can be found in mainstream retailers; and while alcoholic wine is not sold in the supermarket chain Migros, non-alcoholic wine can be found in these stores.

### Wine on retailers' shelves in Switzerland

As noted above, Swiss consumers tend to prefer quality to quantity when it comes to wine. Combined with the higher cost of living in Switzerland, this means the retail prices of wine tend to skew high. More specifically, in volume terms:

- Around 10% of still wine retails for under CHF 7 per bottle. This can be considered the economy segment.
- The vast majority of wine – around 70% - retails for between CHF 7 and CHF 19 per bottle. This can be considered the mid-range segment. Different price intervals within this range show different levels of popularity depending on the wine type. The CHF 14 to 19 range is the most popular for red wine (just under 30% of all sales by volume) while for rose wine, the CHF 10 to 14 range is the most popular (30% of sales). The white wine market is more varied price-wise; over half of white wine retails for between CHF 10 and CHF 19.
- Around 15% of wine (20% in the case of sparkling wine) retail for above CHF 19 per bottle. Bottles above CHF 19 can be considered premium or higher. It is not uncommon to find a few bottles selling for above CHF 50 in mainstream retailers.

In terms of packaging, glass bottles remain the norm in Switzerland, with 98% of wine sold in this packaging and 750ml the norm. 3000ml boxed wine is something that is only really seen in the economy segment.



In terms of display, it is common for wines to be sorted by their country of origin. Some retailers will include descriptions and tasting notes for wines on the shelves next to the price label.

*Below: wine in a major supermarket. It can be seen that the wine is organised by type and by origin (aisle banner: Spain). The small red labels next to the price provide further information on the wine.*



While promotion on wines through pricing is not so common, some retailers hold wine tasting events (normally based on a theme – whether the type of wine, e.g. reds, sweet whites; or wines from a certain region). These both provide customers a chance to consume wine after tasting, and to obtain more suggestions for new wines.



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### 5.4.3 Offer

#### Domestic production

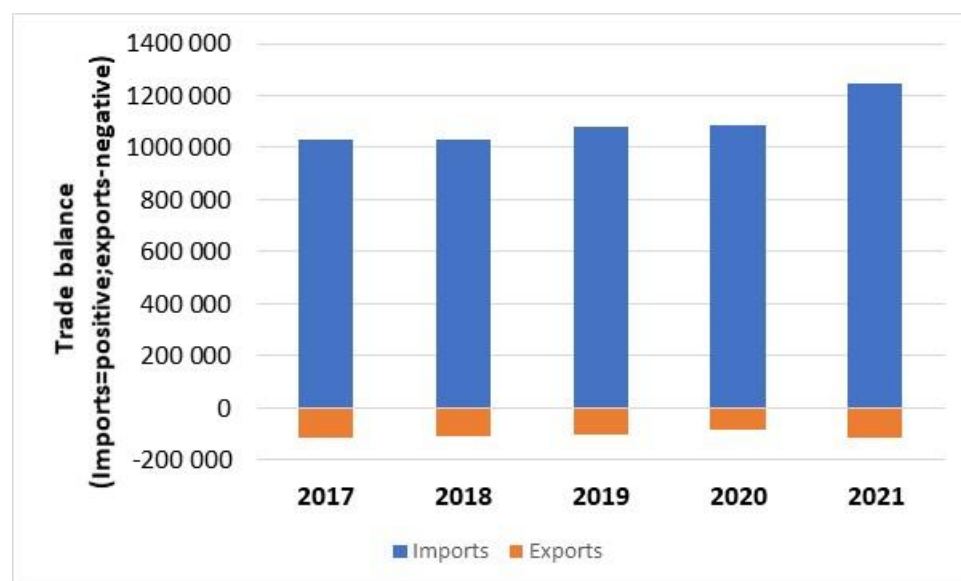
While not known internationally for its production of wine, especially when compared to France and Italy, Switzerland does produce a significant amount of wine. However it is largely consumed within the country with exports being quite small. There are six growing areas of Switzerland,

these are: Geneva, Ticino, Bern, Vaud, Valais and the three lakes region which makes up the majority of the land area of the French-speaking region of Romandie. An estimated 250 grape varieties are grown and harvested in Switzerland with the more popular variety including Chasseles (white), Gamay and Humage to name a few. It is estimated that around 15 000 hectares of Swiss land are made up of vineyards with the west and south of the country being the main regions that produce wine the country. On average, Switzerland produces around 1 million hectolitres of wine every year although only around 1-3% of this is exported to foreign markets.

## Imports and exports

As shown in Figure 5-15, Switzerland is a large net importer of wine, this is a reflection of the demand for high-quality wines (typically from the EU) amongst consumers in the country and a reflection of Switzerland being a country that does not export a lot of wine despite significant domestic production.

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

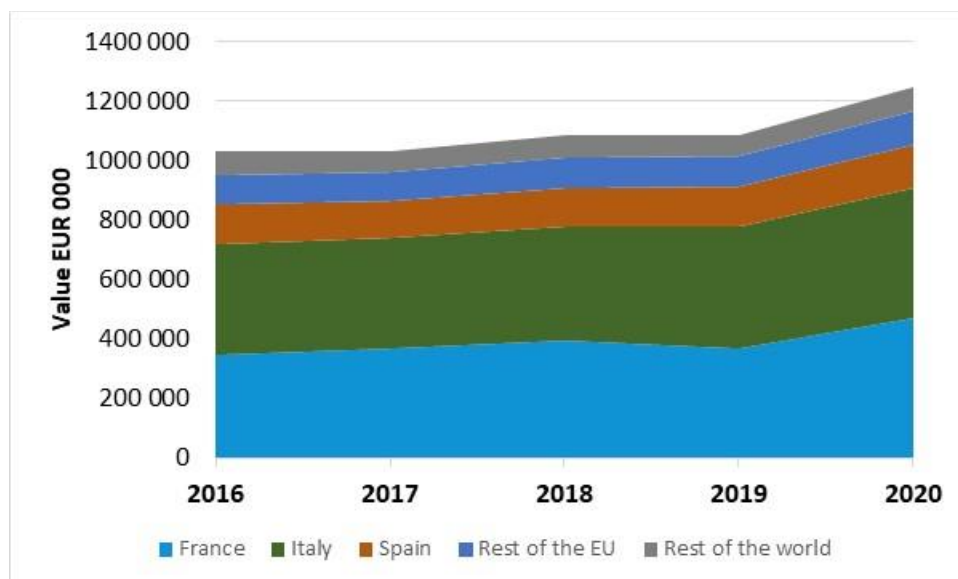


Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 2204.

In 2021, France was the main exporter of wine to Switzerland, followed by Italy and Spain (Figure 5-16). France exported wine with a value of about EUR 467m while Italy exported a total of EUR 440 m. Spain exported value in 2021 of roughly EUR 145 million. The rest of the EU exported a total value of EUR 111 million worth of wine in 2021 with Germany, Portugal and Austria being the larger EU member states exporting wine to Switzerland.

**Figure 5-16: Swiss imports of wine by country, 2016-20; EUR 000**

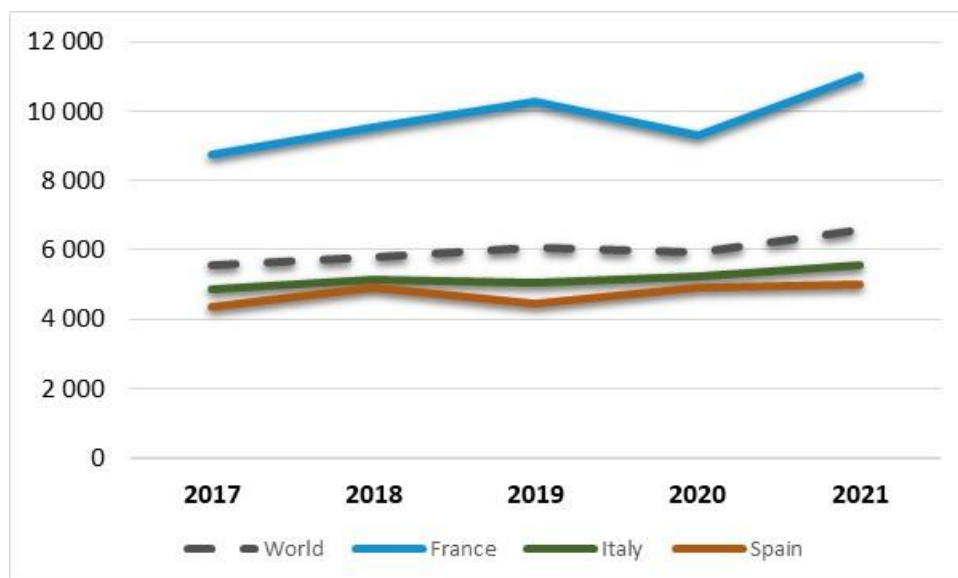


Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 2204.

The world average unit value of wine exports to Switzerland was around EUR 6 570 per tonne in 2021 as depicted in Figure 5-17. Since 2017 the world average unit value increased year by year. The unit values of main France were above the world average at EUR 10 980 per tonne; though the general importance of France skews this world average upwards. The unit value of Italian exports was just below the average at EUR 5 550 per tonne; close to that of Spain (around EUR 5 000 per tonne).

**Figure 5-17: Swiss 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, EU wine products with GI protection are further granted full protection in Switzerland

## Main competitors

Overall, Swiss domestic wines are the biggest competitor to EU wines in Switzerland as these products are appreciated by Swiss consumers and have connotations of sustainability and authenticity which resonates with Swiss consumers. The USA, Chile and Argentina are the largest non-EU exporters of wine to Switzerland however total imports from these three countries are far smaller when compared to the EU as a whole. Indeed, overall the EU accounts for around 90% of wines imported by Switzerland.

### 5.4.4 Specific market entry requirements

#### Market Access and Entry

If wine products do not meet Swiss technical standards, then a marketing authorisation for foodstuffs under the Cassie de Dijon principal document is required. Furthermore, registering with the Swiss wine trade inspector is also required for most wine categories being sent to Switzerland.

**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 wine category (2204) from Spain to Switzerland***

[Results | Access2Markets \(europa.eu\)](#)

#### Standards, Labelling

Wine must conform with the labelling requirements set out in section 4.2.3. This includes, among others:

- Minimum ethyl alcohol by volume
- Bottling date
- Classification based on sugar content
- Year of harvest
- Mandatory warning
- Place of origin

### 5.4.5 Distribution

Approximately 88.5% of wine sales by value in Switzerland were sold off-trade and the remaining 11.5% through on-trade in 2021. The percentage of wine being sold off-trade increased by about 4.5% compared to before the pandemic. Figure 5-18 shows the off-trade distribution channels. Modern grocery retailers accounted for 77.3% of sales with supermarkets further accounting for

the majority of sales with a 53.9% share of total sales. This is despite the aforementioned ban on alcohol sales by major retailer Migros. 16.3% of sales came from the traditional grocery retail market. 5.4% of all wine sales were distributed via the e-commerce channel in 2021. This latter channel has grown greatly in popularity over the last few years. While the retailer Migros does not sell wine in store, the product can be found for sale on its e-commerce platform leshop.ch. Flaschenpost is a particularly popular online specialist wine retailer in Switzerland.

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



Source: Euromonitor International: Alcoholic Drinks, 2021.

#### 5.4.6 Challenges for EU products

Wines from the EU have a good perception in Switzerland particularly those from France, Italy and Spain. Swiss consumers have been shown to spend more for imported wines from these and other larger EU wine-producing countries when seeking out luxury high-end wines. For more regular day-to-day wine drinking Swiss consumers will likely seek out domestic wines which are also perceived as high-quality products and pose the greatest challenge for EU wines. Bulk wines from wine-producing regions such as Australia pose less of a threat to EU wines when compared to certain other third-country markets. Overall, EU wines hold a strong position in the market.

### Market Takeaway: Wine

**Consumption:** The wine market was around EUR 4.2 in 2021. Overall per capita consumption in Switzerland is high ranking just below consumption levels seen in large wine-producing nations such as France and Italy.

**Competition:** Mainly from domestic producers amongst consumers seeking regular conventional wines for average day-to-day consumption. Consumers seeking high-end luxury wines will often seek out EU wines which are held in high regard in the country.

**Distribution:** 11.5% on-trade and 88.5% through off-trade channels by value. While modern retailers dominate off-trade sales, e-commerce is increasingly utilised by consumers seeking wine products; especially given the large retailer Migros continues to implement a ban on alcohol sales.

**Challenges:** Competition with domestically produced wines is the largest challenge for EU-produced wines in the Swiss market as Swiss wines benefit from the perception of being sustainably produced and a source of pride amongst consumers in certain wine-producing cantons.

**Opportunities:** Sparkling wine will be the fastest-growing wine between 2021 and 2026 with all other wine categories also expected to see a growth in consumption rates. The re-opening of the food service further acts as a key opportunity for EU wines in the Swiss market. Organic and non-alcoholic wines are growing in popularity.

## 5.5 Spirits

### 5.5.1 SWOT analysis

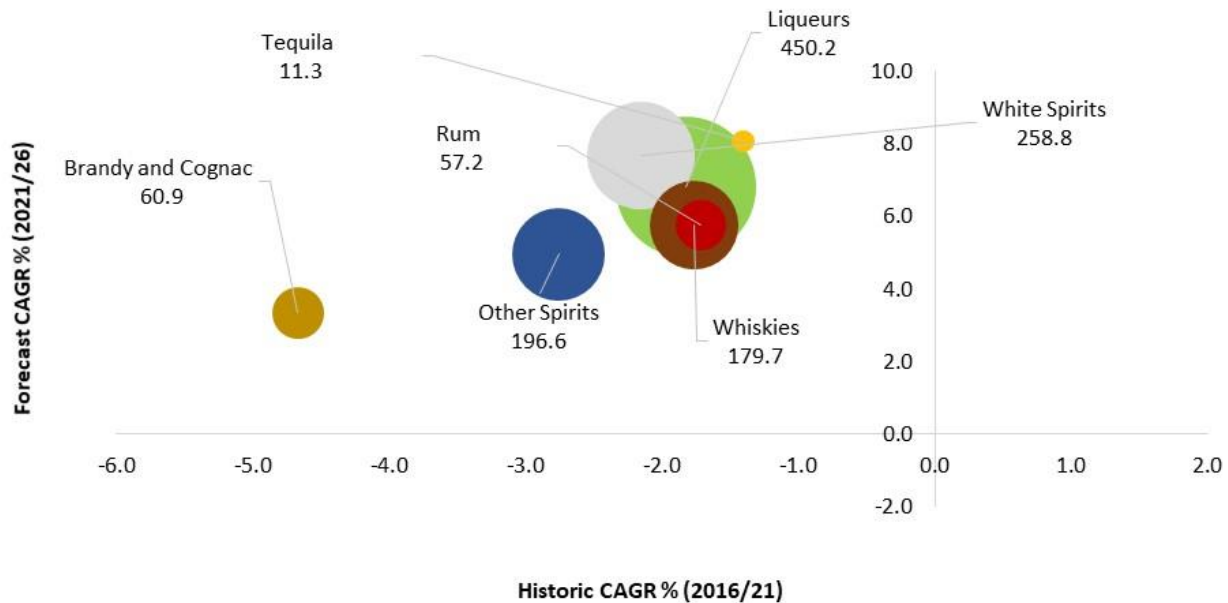
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> <li>▪ EU accounts for the majority of total exports of spirits to Switzerland and in particular, largely accounts for the exports of vodka plus liqueurs and cordials to the country.</li> <li>▪ Across all major spirit product categories, a positive CAGR is forecasted between 2021-2026.</li> <li>▪ EU spirit brand labels are well respected in Switzerland which reduces the desire for Swiss consumers to seek out domestic-only spirit products.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Swiss consumers are larger consumers of beer and wine products instead of spirits</li> <li>▪ The on-trade distribution of spirits while rebounding has yet to recover to pre-COVID-19 levels when it accounted for 20% of Swiss spirits sales.</li> <li>▪ Swiss advertising regulations for spirit products are restrictive.</li> </ul>
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> <li>▪ Demand for non-alcoholic spirits is growing rapidly in Switzerland.</li> <li>▪ Swiss consumers notably consume more spirit products during the colder winter months leading to a spike in demand around this period.</li> <li>▪ Switzerland is a net importer of spirits and has shortfalls in the production of vodka, whisky and grape spirits relative to domestic production.</li> <li>▪ Market appreciates premium products – most notably in the categories of whisky, brandy and cognac.</li> </ul>	<ul style="list-style-type: none"> <li>▪ The UK is the biggest competitor in the gin and whisky market.</li> <li>▪ The Swiss craft gin, vodka and whisky sector continues to grow.</li> <li>▪ The most popular spirit category liqueur is also one of the main spirit products domestically produced in Switzerland.</li> </ul>

### 5.5.2 Consumption

#### Evolution of consumption

As observed below in Figure 5-19, liqueurs are the most popular spirit product in Switzerland with a market value of EUR 450 million. Liqueurs are expected to see a forecasted CAGR of 6.8% between 2021 and 2026 which will see this category remain the most popular in Switzerland in the immediate term future. White spirits (including vodka) are the second most popular spirit product in Switzerland with a market value of EUR 258 million followed by other spirits (EUR 196 million), and Whisky (EUR 179 million). Spirits such as brandy, rum and tequila are all valued under EUR 100 million. Across all spirit categories in Switzerland, there is strong growth predicted with every spirit product mentioned expected to see a positive CAGR between 2021 and 2026 with tequila being the fastest growing at a CAGR of 8.1% and brandy and cognac being the slowest growing at a predicted CAGR of 3.3%

**Figure 5-19: Evolution and forecast of spirits market in Switzerland, 2016-2026; total value, EUR millions**



Source: Euromonitor International: Alcoholic Drinks, 2021.

## Consumer profile and purchase criteria

### Consumers

The consumption of spirits in Switzerland is broadly in line with the western European average at a per capita consumption rate of 1.8 litres per person per year which is roughly the same rate found in neighbouring Germany and Austria. However, this is far below consumption rates seen in other central European states such as Hungary and Poland. Overall, Spirits is the third largest alcoholic beverage category consumed in Switzerland behind both wine and beer. Below is a breakdown of particular consumer groups based on the spirit product category:

- **Vodka:** Vodka (and other white spirits) has the second largest market value in Switzerland, the product is largely imported from abroad although some smaller Swiss vodka brands are on the market. Vodka appeals largely to urbanised cosmopolitan consumers who are more likely to consume non-Swiss alcoholic beverages (and pay the extra costs attached to them). Younger consumers and middle-aged consumers are also the more likely consumers of vodka in Switzerland as older consumers generally prefer other spirit products or attach negative connotations to vodka. The key age demographic is 18 to 40 year olds.
- **Whisky** is the fourth most popular spirit product in Switzerland based on market value. The product is more popular amongst older more affluent consumers and urbanised cosmopolitan consumers with a higher amount of disposable income. Whisky is also largely imported which results in higher costs for consumers, which dissuades many lower-income earners to purchase the product regularly. Men aged over 40 are the most prominent whisky drinkers.
- **Brandy and cognac.** The market for these drinks is far smaller than larger categories

such as whiskey and white spirits. This is greatly influenced by the high costs attached to a premium brand and cognac product which results in the product being largely purchased as a luxury item or purchased as a gift rather than for regular alcohol consumption. Consumers therefore of brand and cognac are most likely to come from a higher income class or urban consumers with greater access to a wider variety of premium brands (cognac in particular). As is the case with whisky, men over the age of 40 are greater drinkers of the category in Switzerland.

- **Gin** is most likely to be consumed by younger and middle-aged urban consumers seeking niche spirit products. The versatility of gin combined with the growing craft spirit scene in Switzerland resonates with younger and middle-aged consumers seeking new tastes, while older consumers are less likely to experiment with different spirits, being more product loyal to spirits such as brandy, whiskey and cognac.
- **Liqueurs** have the largest retail value in Switzerland and a number of the more famous spirits produced in Switzerland fall into this category such as Swiss Schnapps, Absinthe and Goldschlager. These products benefit from the perceived “Swissness” of their brands which brings connotations of quality and authenticity which appeals to Swiss consumers. These products also benefit from a more traditional history of consumption in the country which results in a wider exposure of these products to Swiss consumers compared to other spirit categories. Nonetheless, there is some interest in imported liqueurs as well. Liqueur drinkers are typically aged over 30, and consumption of the product increases during colder seasons.

Total spirit consumption in Switzerland is expected to grow at an average CAGR hovering around 4.6% between 2021 and 2026. This is aided by the reopening of the food service sector of the country post-COVID-19, the burgeoning craft production scene in Switzerland and the return of tourism will further act as a key driver behind the growth of spirit consumption in Switzerland.

### Drivers and method of consumption

Drivers for the consumption of spirits in Switzerland include:

- ***Desire for non-wine or beer-based alcoholic beverages.*** Overwhelmingly, Swiss consumers have a preference for beer and wine products over spirit consumption, this is driven by both beer and wine being the traditionally preferred alcoholic beverages in Switzerland and spirits being generally more expensive. Consumers seeking niche non-wine or beer alcoholic beverages usually switch to spirits such as liqueurs or vodka.
- ***Swissness.*** Liqueurs are the highest-consumed spirit category in Switzerland and many Swiss-produced spirit products fall into this category. While not large overall consumers of spirits, it is normalised in Switzerland to have a small (44 ml) offering of spirits during get-togethers or social activities, these spirits are often domestic liqueurs or imported vodka or whisky products.
- ***Reopening of the on-trade food service sector.*** The reopening of the on-trade food service sector post-COVID-19 is helping to drive growth in the consumption of spirits in Switzerland, as discussed, all major spirit products are forecasted to see a positive CAGR between 2021 and 2026 with the reopening of the on-trade food service sector compounding this growth.

Overall, Swiss consumers are more likely to consume whiskey, cognac or brandy products at home or gift them, while other spirits are more likely to be consumed at on-trade establishments. White spirits are particularly popular in bars and clubs. Swiss consumers also often mix liqueurs into warm drinks such as coffee (in a similar fashion to popular drinks such as French or Irish

coffee), tea or hot chocolate; this is particularly common during the colder winter months. Some liqueurs are also used in cooking. Consumers of spirits in a social setting will often clink their glasses together before consuming spirits and look each other in the eyes when doing so.

### **Purchase criteria**

Swiss consumers generally regard spirit products of all varieties as luxury premium products, this is due to the influx of cheaper domestic beer and wines available on the market coupled with many (non-liqueur) spirits being imported from abroad which makes them more expensive than general alcoholic beverages. Brand labels are important for Swiss consumers who will be generally quite knowledgeable of major EU spirit labels. Efforts to highlight the uniqueness and quality of a spirit product will resonate with Swiss consumers who are accustomed to high-quality agri-food and beverage products. Often consumers seek out products which display regions of Switzerland although this is specific to domestically produced spirit products rather than imported spirits from the EU.

For categories such as cognac/brandy and whisky, quality tends to be prioritised over price, with consumers paying attention to aspects such as production process, age and origin (including geographical indications). On the other hand, consumers of white spirits are more likely to be price aware/sensitive, and may be influenced by brands. Liqueur consumers tend to favour domestic products which have been present on the market for many years and may also choose products based on their medicinal properties during the cold season. However they may be drawn to imported products on the basis of flavour.

### **Recent market trends**

The re-opening of the food service sector in Switzerland is helping to drive sales of spirits in Switzerland. Prior to COVID-19 in 2018 roughly 20% of all spirits in Switzerland were consumed through the on-trade food service sector. The rebound in consumption through this channel is coupled with the general trend of Swiss consumers seeking out on-trade food establishments to a higher level post-COVID-19 than before the pandemic.

One of the most recent innovations in the Swiss spirits sector has been the production of non-alcoholic spirits with non-alcohol gins and rums growing in consumption in the country. As consumers have grown more health-conscious post-COVID-19 it is likely that growth in the country's non and the low-alcohol market will continue to be strong and compliment the overall predicted positive CAGRs for spirits in Switzerland. There is also an ongoing strong performance of gin which is being supported by increasing interest in craft distilleries that produce mostly handcrafted speciality spirits. Even though craft spirits are not yet as widely known or as important as craft beers, their production, range and sales are expected to continue to grow rapidly in the coming years which will positively impact the Swiss spirits market. New flavours such as coriander, ginger and bitter orange are emerging as a result of this craft gin trend.

Finally, with decreases in per capita consumption of alcohol, many Swiss consumers are focusing on the quality of the alcohol they drink rather than the quantity. This is effectively leading to a greater premiumisation trend in a market which already has a high aggregate appreciation of premium products.

#### **Spirits on retailers' shelves in Switzerland**

In terms of market segmentation, most of the spirits market in Switzerland is focused on the standard segment. Well-known brands (such as Smirnoff and Gordon's) from large

multinational producers can be considered to fall in this standard segment in Switzerland. Around 65% of rum sold by volume and half of gin, whisky and vodka target this standard segment. There are nonetheless notable premium, super-premium, ultra-premium and prestige segments in Switzerland. Almost 20% of whisky and vodka and over ¼ of gin sold in Switzerland by volume is classed as premium; with around 15% of gin and whisky and 20% of vodka considered super premium or above. There is a wide price interval for the mid-range segment, with spirit type and alcohol content playing a big role. That said, most mid-range products sell for between CHF 20 and 50 for a 700ml bottle. Retail prices for the premium segment generally start at CHF 50 for a 700ml bottle.

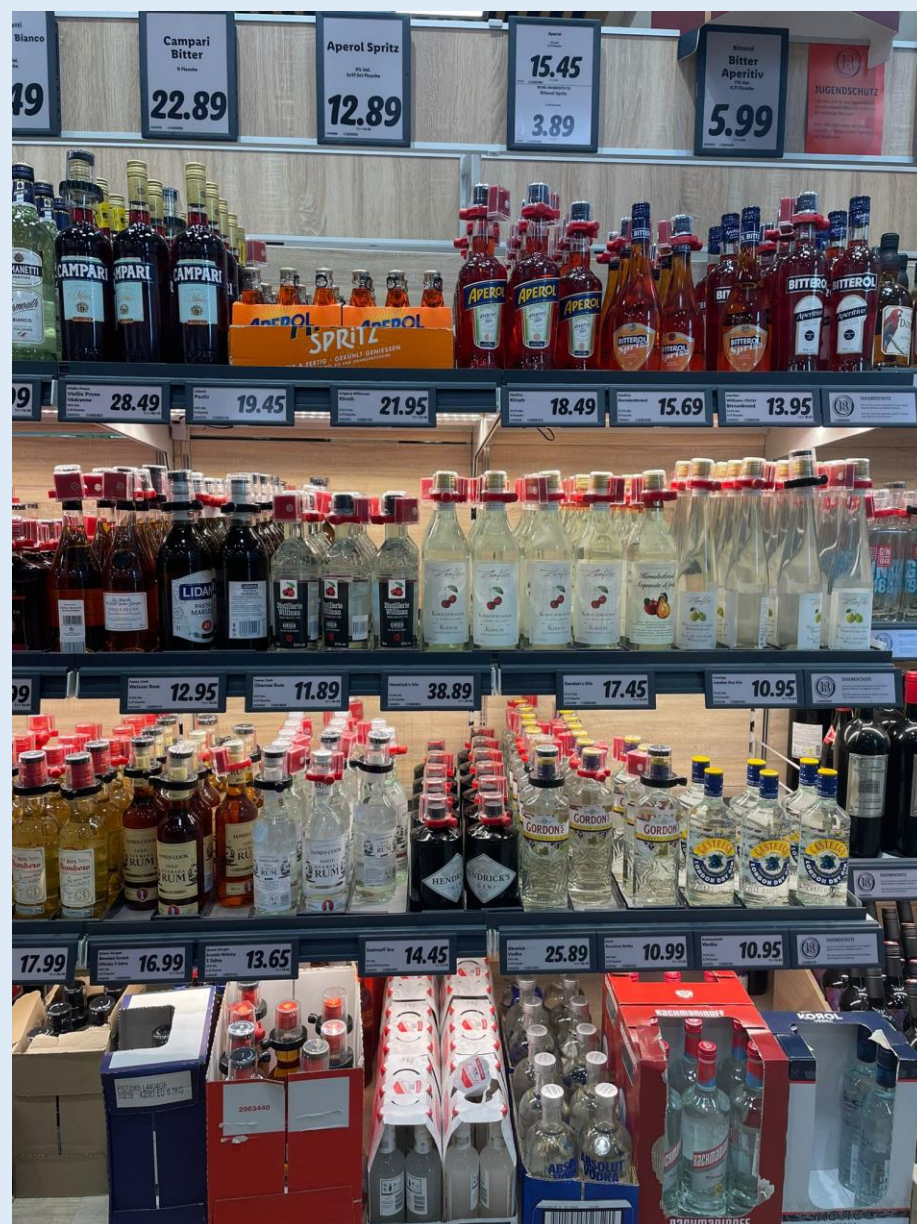
*Below: spirits displays in two large retailers. The selection is dominated by what may be considered in Switzerland as mid-range products. While most products are packaged in 700ml bottles, it is possible to see a range of packaging designs to capture consumers' attention, including cardboard boxes, tags and sleeves on bottles; as well as unique bottle designs.*





700ml glass bottles are the most popular packaging format; though a few products are sold in larger or smaller quantities (e.g. 525ml and 1000ml). Packaging is an important element for spirits. It is common to see elegant patterns plus sleek designs, materials and labels in order to emphasize the premium or unique character of the product. Craft producers are more likely to use simple designs with more focus on the product, its history or its story; and in some cases, sustainability credentials. Consistency of the label with the desired message is important.

*Below: spirits selection in a discounter. The range is dominated by the economy and standard segments.*



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### 5.5.3 Offer

#### Domestic production

Domestic production of spirits in Switzerland is focused largely on the country's production of liqueurs such as Absinthe, Schnapps and Goldschlager to name a few. Production of liqueurs in Switzerland constitute the majority of spirits produced in the country, reasons for this include the popularity of this product amongst the Swiss consumer base and the antiquity of regulations that were in place for the production of other spirits such as vodka and whisky (production of both these products was banned in Switzerland up until 1999) which resulted in the production of these major spirits being largely in its infancy in Switzerland up until recent years. Swiss vodka brands such as Xellent have established themselves in the Swiss market; however, the majority (over 3/4) of vodka consumed in the country continues to be imported from abroad. The vast majority of whisky drunk in the country is also imported – Switzerland only produces around 1 500 pure alcohol hectolitres of whisky each year. Production of brandy is greater (around 5 000 hectolitres) but still massively insufficient to meet domestic demand.

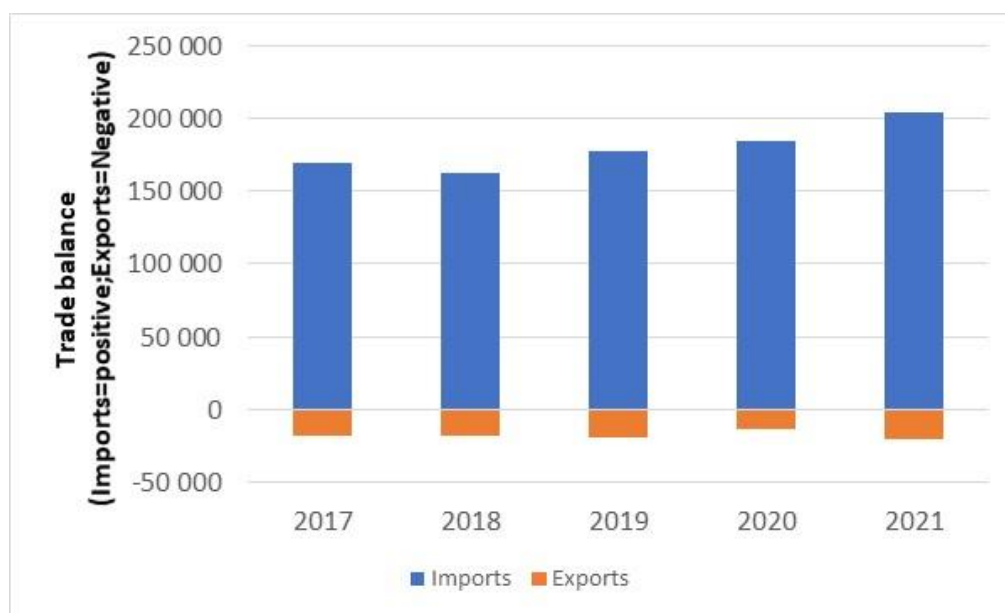
There is a burgeoning craft spirit sector in Switzerland mainly focused on the product of gin craft spirits and to a lesser extent rum and vodka, Some of the more popular craft spirits produced in Switzerland include the brand label nginius! And Falco gin. Production of gin in the country has ramped up rapidly in recent years as a result of this trend, from around 400 hectolitres of pure alcohol in 2018 to almost 1 500 hectolitres in 2021.

#### Imports and exports

As shown below in Figure 5-20, Switzerland is a net importer of spirits with the country importing EUR 203 million worth of spirits in 2021. This is a rise from the figure in 2017 of EUR 169 million.

Exports have remained fairly stable with a value of between EUR 17 million and EUR 20 million between 2017 and 2021.

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

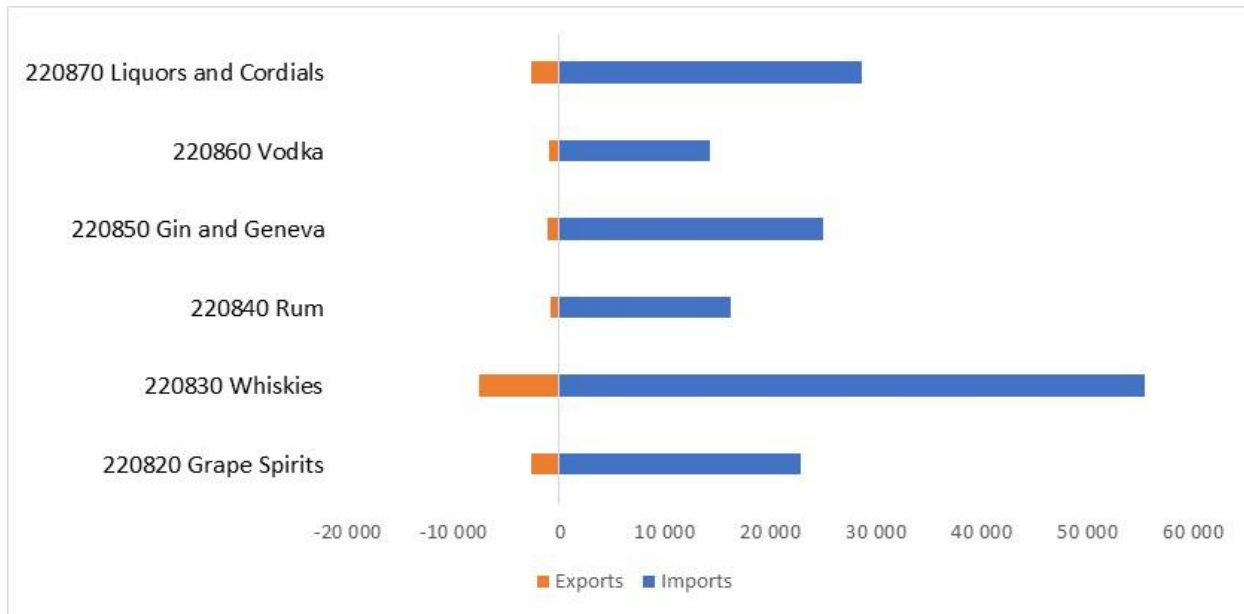


Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 2208.

As shown below in Figure 5-21, whisky is the most imported spirit product in Switzerland with the country importing EUR 55 million in 2021. This was followed by liqueurs and cordials to a value of EUR 28 million and gin and jenever at EUR 24 million.

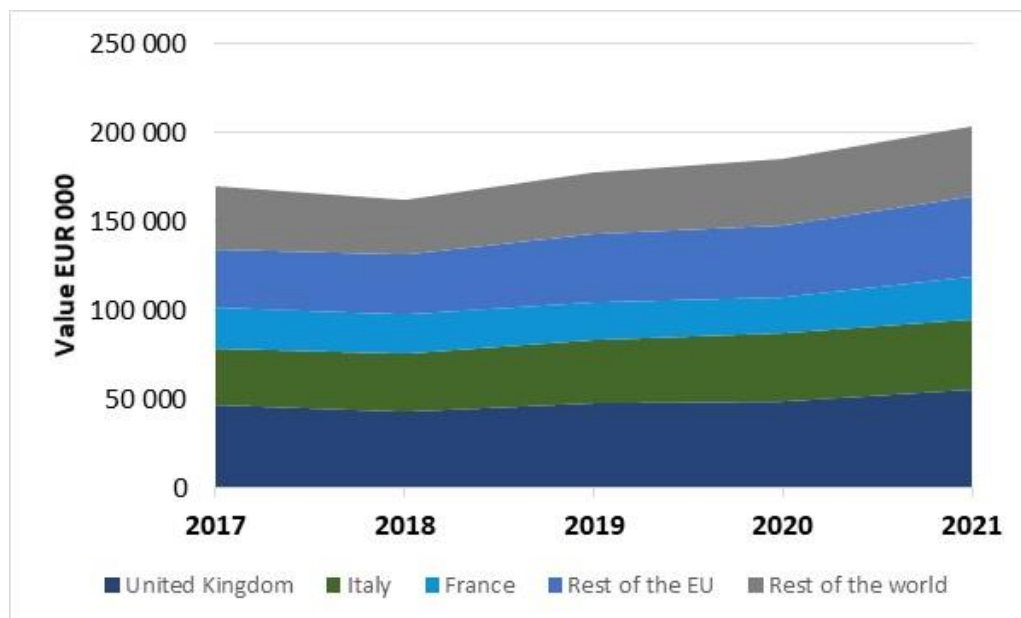
**Figure 5-21: Trade balance (imports and exports) of spirits in Switzerland, by type, 2021; EUR 000**



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

Spirit names shortened. CN codes before spirit name.

Figure 5-22 below shows the origin of Swiss spirit imports, with the UK being the largest exporter at a value of EUR 55 million due to the popularity of Scotch whisky and English gin. This is followed by Italy with a value of EUR 39 million and France at EUR 23 million. Other large EU exporters include Germany, Ireland and Sweden.

**Figure 5-22: Swiss 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, EU dairy products with GI protection are further granted full protection in Switzerland.

## Main competitors

The largest market competition for imported spirits in Switzerland comes from the UK which largely exports whisky and gin to Switzerland. This presents competition for larger EU whisky and gin producers such as Ireland. Switzerland's most consumed spirit category, however, is liqueurs and cordials. This category accounts for the majority of spirits produced by Switzerland which places limits on the exportation opportunities that exist for EU producers. Nonetheless, EU spirits enjoy a good reputation in Switzerland. The United States presents competition in the whisky market and to a degree rum market. Overall, the EU accounts for the majority of spirits exported to Switzerland.

## 5.5.4 Specific market entry requirements

### Market Access and Entry

Should the spirit product not comply with Swiss technical standards, then a marketing authorisation for foodstuffs under the Cassie de Dijon principal document is 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 – general spirits category (2208) from Spain to Switzerland***

<https://trade.ec.europa.eu/access-to-markets/en/results?product=2208&origin=ES&destination=CH>

## **Standards, Labelling**

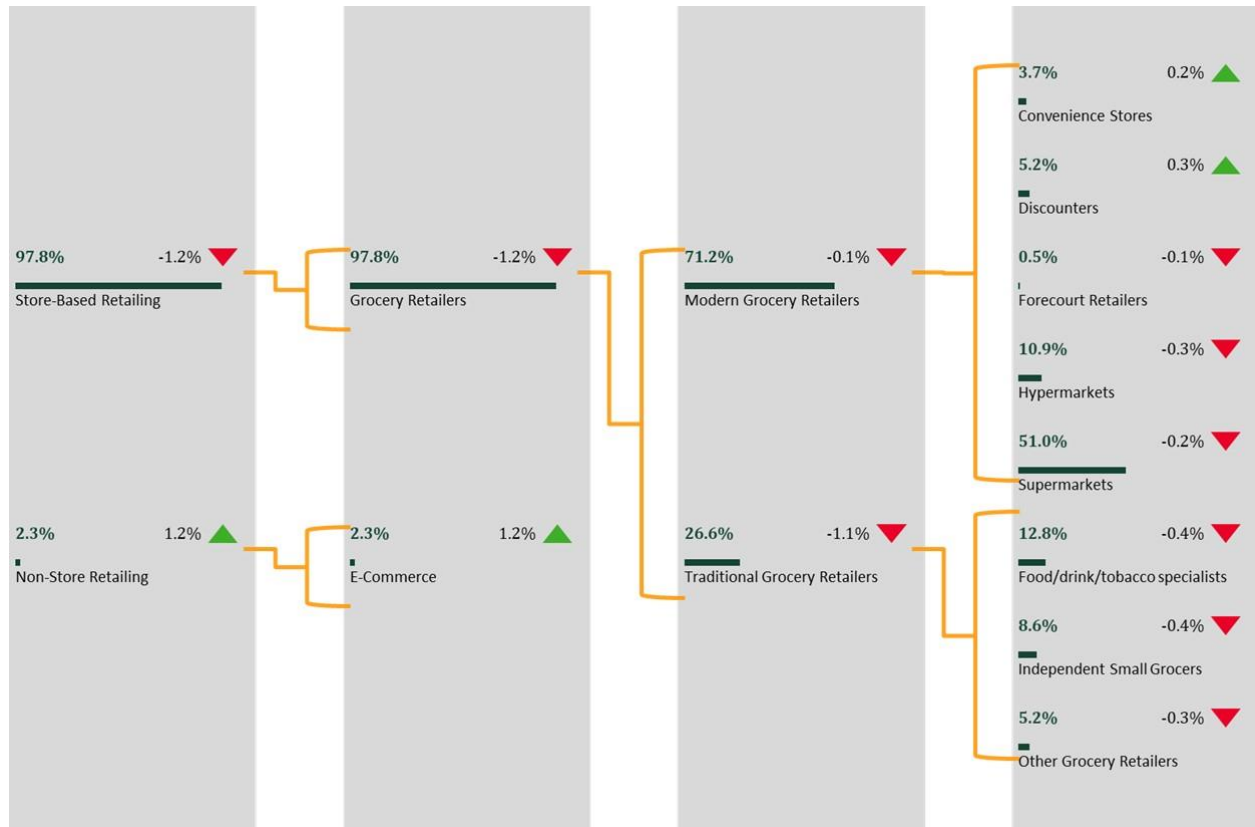
Spirits must conform with the labelling requirements set out in section 4.2.3. This includes, among others:

- Minimum ethyl alcohol by volume
- Bottling date
- Composition
- Mandatory warning
- Place of origin

## **5.5.5 Distribution**

The distribution of spirits is focused largely on modern grocery retailers which account for 71.2% of spirit sales in Switzerland with supermarkets accounting for 51% of total sales. Traditional grocery retailers account for just over a quarter of sales with food/drink/tobacco specialists accounting for 12.8% of spirit sales in Switzerland. E-commerce is growing but still somewhat limited, accounting for 2.3% of spirit sales in Switzerland. On-trade food establishments accounted for nearly 20% of sales just before the outbreak of COVID-19 with this figure declining to 16.3% in 2021 due largely to COVID-19. It can be expected that the share of on-trade food establishment sales will continue to rebound going forward as Swiss consumers have been shown to be visiting on-trade food and beverage establishments to a higher degree than before COVID-19 as restrictions have been lifted.

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



Source: Euromonitor International: Alcoholic Drinks, 2021.

### 5.5.6 Challenges for EU products

Challenges for EU products include Swiss consumers generally preferring and consuming beer and wine products instead of spirit products coupled with the more popular spirit products in Switzerland being liqueurs which are largely produced in the country. British gin and whisky products are the biggest competitors to EU whiskey and gins in the country; furthermore, there is also a burgeoning Swiss craft whiskey and gin production sector. Switzerland is a smaller producer of rum, vodka and grape spirits which presents key opportunity markets in the Swiss market even if the total consumption of these spirits is smaller than whiskey and liqueurs.

### Market Takeaway: Spirits

**Consumption:** Spirit consumption in Switzerland is broadly in line with other western European countries, with consumers in the country preferring generally to consume beer and wine instead of spirits. Despite this, certain spirits such as liqueurs are popularly consumed in the country. Across all major spirit categories, there is a forecasted positive CAGR between 2021 and 2026.

**Competition:** Swiss liqueurs are the biggest competitor as liqueurs are the most popularly consumed spirit in Switzerland. British whisky and gin also present major competition for EU variants of these products as does American whisky and to a less extent rum.

**Distribution:** On-trade sales accounted for almost 20% of the volume of spirits distribution in 2019 prior to COVID-19. By 2021 this figure had dropped to around 16% however it is expected to rebound in the near future to pre-COVID-19 levels. Off-trade distribution is mainly focused on modern grocery outlets such as supermarkets and hypermarkets, with these accounting for over 70% of distribution followed by traditional grocery outlets such as independent small grocers which account for over a quarter of sales.

**Challenges:** The most popularly consumed spirit product in Switzerland are liqueurs which are also the most produced spirit product in the country which leads to intense competition within this product sector. British and American spirit exports are also a key challenge for EU products in the market as are the tight advertising regulations for spirit products which is discussed further in section 6.2.

**Opportunities:** Vodka is a key opportunity market in Switzerland as the country does not have a large production base for the product and this product is growing in popularity in the country. The winter months in Switzerland in particular see a rise in spirit consumption as consumers seek warm drinks; spirits such as whiskey and liqueurs in particular benefit from this opportunity trend. Premium whisky, cognacs and brandies are appreciated in the country.

## 5.6 Olive oil

### 5.6.1 SWOT analysis

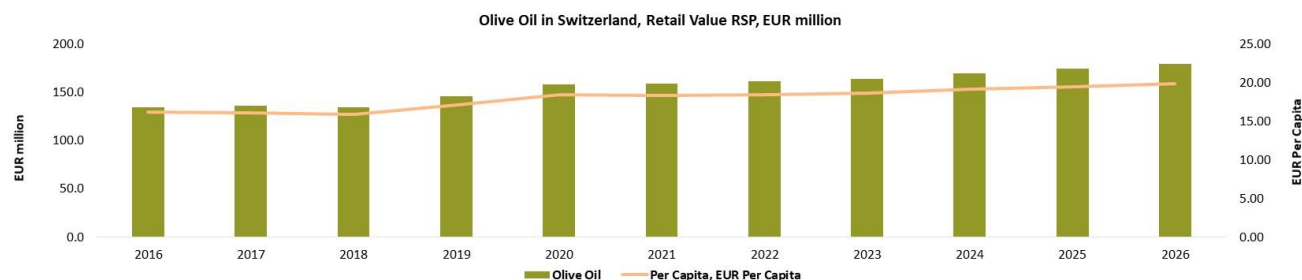
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> <li>▪ Olive oil consumption in Switzerland is quite high in per capita terms and is forecasted to continue to grow up until 2026.</li> <li>▪ EU dominates the exports of olive oil to Switzerland.</li> </ul>	<ul style="list-style-type: none"> <li>▪ The duopoly of the Swiss retail market limits opportunities outside of the major retailers of Migros and COOP, with these two supermarket retail chains accounting for over half of sales.</li> <li>▪ A lot of the olive oil products sold in the country are Swiss-bottled private label products.</li> </ul>
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> <li>▪ Marketing targeted at health-conscious consumers.</li> <li>▪ Organic olive oil demand will continue to grow and now constitutes 10% of the sales of olive oil in Switzerland. Increased interest in single origin/variety olive oils.</li> <li>▪ Supplying in bulk for the private label market.</li> </ul>	<ul style="list-style-type: none"> <li>▪ A free trade agreement with Tunisia and Turkey presents a possible future threat to EU olive oil sales; however, impacts are likely to be limited in the short-term.</li> </ul>

### 5.6.2 Consumption

#### Evolution of consumption

The market for olive oil shows a steady growth in consumption per capita with a rate of 18.3 litres per capita in 2021 which is expected to rise to 19.9 litres by 2026. (Figure 5-24). The overall market for olive oil in Switzerland was valued at EUR 158 million in 2021 and is a figure expected to rise to EUR 179 million by 2026.

**Figure 5-24: Evolution and forecast of the retail market for olive oil (value, EUR millions) and olive oil consumption per expenditure, in Switzerland; 2016-2026**



Source: Euromonitor International: Packaged Food, 2022.

Note: figures for 2021 to 2026 based on forecasts.

## Consumer profile and purchase criteria

### Consumers

Consumers in Switzerland are well accustomed to the use of olive oil as a healthy dressing and cooking product. Some of the key consumers of olive oil in Switzerland include urbanised consumers with greater access to olive oil products; consumers living in the south of Switzerland near Italy; expatriates and residents of Mediterranean origin; health-conscious consumers; and culinary enthusiasts/chefs. More specifically:

- Urbanised consumers (which account for 75% of the population) will be readily exposed to olive oil products within larger retailers such as Migros or COOP and within on-trade food establishments which are likely to use olive oil products (such as Italian or Greek restaurants).
- In the south of Switzerland, there is a notable amount of cross-border commuters arriving from Italy to work in Lugano and the wider Ticino region. As Italian consumers constitute some of the larger consumers of olive oil globally many will retain this practise while travelling or working in Switzerland which compounds sales of olive oil in the country.
- As previously noted, around ¼ of the Swiss population are foreign nationals residing in the country, and furthermore there are many Swiss nationals with overseas origins. Residents in these groups with Mediterranean origins tend to be strong users of olive oil in their traditional cuisine.
- Swiss consumers as a whole have grown ever more health conscious as a result of COVID-19, with young adults (under 40) particularly likely to be health aware. These health conscious consumer groups are more likely to consume olive oil than other oil types such as rapeseed or sunflower.
- Culinary enthusiasts and chefs in the more exotic Swiss resorts tend to prefer olive oil over other cooking fats due to its flavour and versatility.

### Drivers and method of consumption

Key drivers of olive oil consumption in Switzerland include:

- ***Influence from neighbouring cuisines and migrant communities.*** Switzerland is next to one of the largest olive oil-consuming countries in the world, Italy; and there is a part of the population with strong links to the country. There are 300 000 people of Italian citizenship and ancestry living in Switzerland with many retaining the use of olive oil in their cooking practises. Furthermore, as Italian commuters and tourists travel to Switzerland to a high degree this acts as a further driver of olive oil consumption in the country. In addition to the connections to Italy, roughly 2.5% of the Swiss population is also Portuguese coupled with a sizable number of Spanish and Greek migrants who are all individuals from a culinary background of high olive oil usage.
- ***Health consciousness.*** The desire for food items perceived as healthy has grown in Switzerland with many consumers now opting to switch to olive oil usage over other alternatives such as vegetable oil. Swiss consumers have been shown to spend more of their income on products with healthy nutritional properties which encourages the consumption of olive oil in the country.
- ***Return of the on-trade food sector.*** The reopening of the on-trade food sector will drive olive oil sales in Switzerland as Greek, Spanish and Italian restaurants reopen with these restaurants highly likely to incorporate olive oil into their dishes and food preparation practises. Swiss consumers have been noted as visiting on-trade food service sectors to

a higher degree post-COVID-19 than pre-COVID-19; and this further drives sale of olive oil in the country.

Olive oil is commonly used to enhance the flavour of foods; most commonly as a dressing for food products such as salad or pasta. Olive oil is also used by consumers who dip their bread into the product. Extra virgin olive oil is preferred for both of these applications. The use of olive oil as a cooking product is also growing in Switzerland; this includes its use in baking as an alternative to butter or other oils.

### **Purchase criteria**

The influence of “Swissness” is much less profound in the olive oil market as Switzerland produces a negligible amount of olive oil, this results in imported (mainly EU) olive oils being the preferred choice of Swiss consumers. Olive oil from Italy accounts for roughly half of all olive oil sold in Switzerland with Spain and Greece making up the majority of the remaining share. A large share of olive oil sold in Switzerland is sold under a private label of major retail chains, mainly COOP and Migros, with these retailers importing olive oil in bulk for bottling within Switzerland. That said, consumers are not overly price sensitive when it comes to olive oil. Nonetheless, products which are too cheap may be perceived as potentially of poor quality, and anything too expensive as overpriced. Most products retail in the range of CHF 10 to 30 per bottle.

Overall, extra virgin olive oil is preferred – particularly when the intended use of the oil is raw. Consumers may pay attention to the certification of the International Olive Foundation (IOF) on the product label, as it guarantees the extra virgin quality and authenticity of the product. Swiss consumers in general tend to like mild and fruity olive oils. Increasingly, consumers are seeking organic olive oil products which now account for roughly 10% of total olive oil retail sales. Consumers of these products tend to be attracted not just by the organic status but also by broader ethical issues such as the sustainability of production and fair treatment of farmers. One of the larger brands of organic olive oil in Switzerland plugs into this trend by having a commitment to plant a tree for each bottle of olive oil sold, and states it pays its farmers above average prices.<sup>46</sup>

### **Recent market trends**

The outbreak of COVID-19 in Switzerland further drove demand for agri-food products perceived to be healthy which in turn has helped to compound the growth of olive oil sales in Switzerland. The reopening of the on-trade food service sector coupled with the small rise in olive oil speciality stores in Switzerland is further helping olive oil sales in the country. The strong outlook for olive oil is further compounded by recent fluctuations in the supply of other oils such as sunflower; though it is of course noted that olive oil itself may face supply challenges in the coming year due to recent harvest challenges in some regions.

A majority of the olive oil sold in Switzerland is produced from blends of oils from different origins or varieties. However, retail chains have started to increasingly sell single-origin olive oils such as Coop's Spanish olive oils Picual Premium and Almazaras De La Subbética<sup>47</sup>.

Another recent trend is the increased popularity of flavour-infused olive oils. In addition to the long-standing garlic flavouring, truffle, chilli-garlic, basil, rosemary and lemon infused oils have

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<sup>46</sup> The European market potential for olive oil, Dutch ministry of foreign affairs, available at <https://www.cbi.eu/market-information/processed-fruit-vegetables-edible-nuts/olive-oil/market-potential>

<sup>47</sup> The European market potential for olive oil, Dutch ministry of foreign affairs, available at <https://www.cbi.eu/market-information/processed-fruit-vegetables-edible-nuts/olive-oil/market-potential>

proved popular. It is also possible to find some more exotic flavours on the market, such as pesto, curry, and smoked oil.

### Olive oil on retailers' shelves in Switzerland

In broad terms, products priced under CHF 10 per litre target the economy segment; those in the mid-range sell for between CHF 10 and 40 per litre (with many selling for between CHF 15 and 30 per litre). Premium products generally sell for above CHF 40 per litre. That said, recently the price gap between standard and premium products has somewhat narrowed.

*Below: olive oil range in a large retail chain. It can be seen that 1000ml glass bottles are popular.*



The preferred packaging format in Switzerland is a dark-coloured glass bottle. Bottle size varies. 1000ml is the most popular format in overall terms of sales by volume. However, it is also possible to find bottles in sizes of 100ml, 250ml, 500ml and 750ml. These smaller packaging sizes are particularly popular for more premium products. PET bottles are generally not well received in Switzerland, with products using this packaging seen as not being high quality. HDPE bottles are growing in popularity, though generally they are used for products towards the lower end of the market.

*Below: olive oil range in a discounter – a limited number of products offered.*



With country of origin important to many consumers, it is common for the product's packaging to clearly communicate its origin.

*Below: olive oil range in a major retailer. Some more premium products can be seen, with these generally using packaging formats smaller than 1000ml. Efforts are made to communicate origin and heritage of these product both on the label itself, and through the use of tags around the bottle's neck with extra information.*



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### 5.6.3 Offer

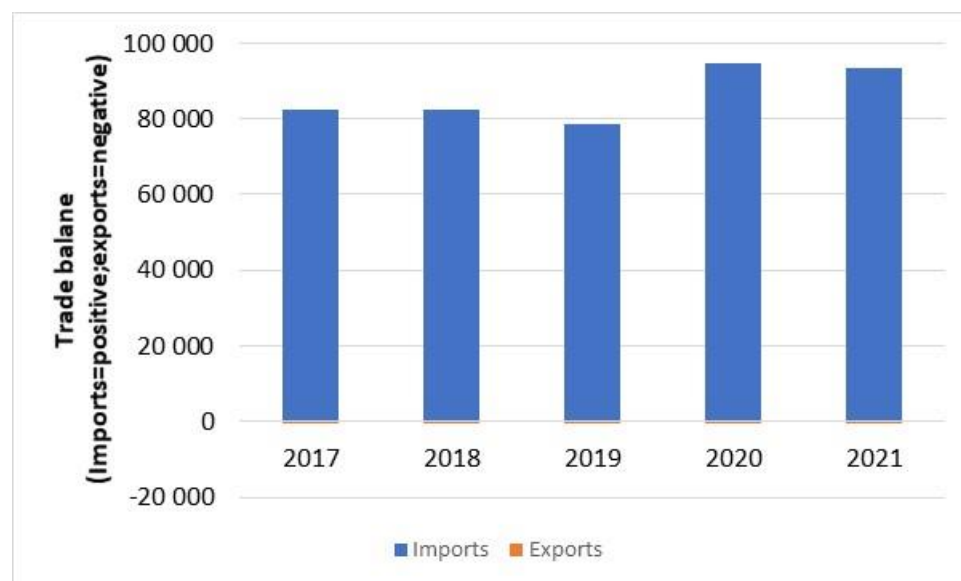
#### Domestic production

Olive oil production in Switzerland is minimal with there being only a small number of olive oil trees located in the warmer Ticino region of Switzerland. This negligible local production is focused on localised independent brands which make up a very small fraction of the market. The Swiss olive oil market is dominated by imports which further signals the small capacity to produce olive oil domestically in Switzerland.

#### Imports and exports

As can be seen in Figure 5-25, Switzerland is an absolute net importer of olive oil. The country effectively exports no olive oil (there is a very small number of re-exports). In 2021 Switzerland imported olive oil with a value of close to EUR 93m. Between 2016 and 2020 imports of olive oil steadily increased. In total, the olive oil imports grew by about EUR 11m between those years. There only was a slight import drop in 2021 compared to 2020. An estimated 60% of olive oil imported into Switzerland is transported in bulk.

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

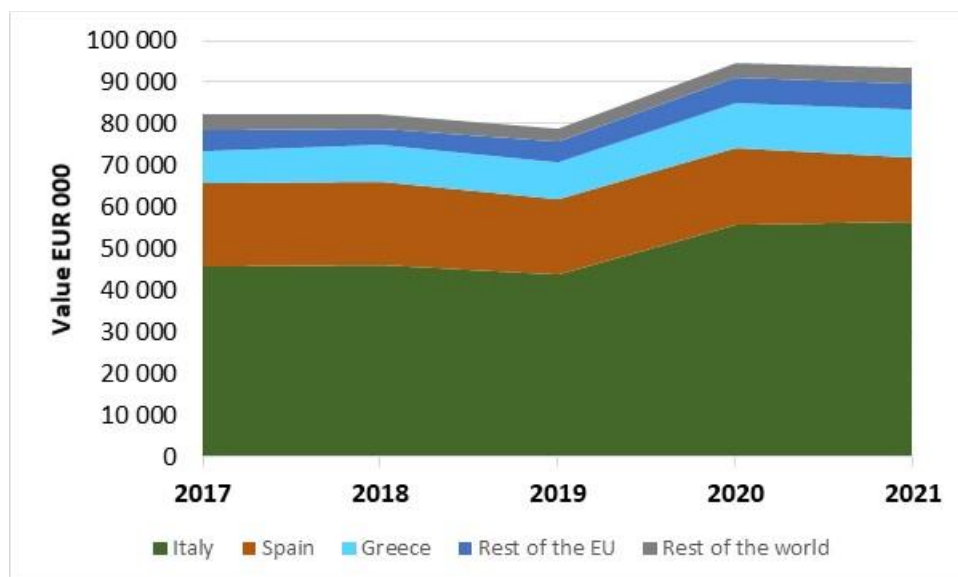


Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 1509.

The EU accounts for nearly all of the olive oil exports to Switzerland as depicted in Figure 5-26. Italy and Spain are the two main exporters to Switzerland and together account for more than 75% of the total imported value. In 2021, Italy exported olive oil valued at close to EUR 56m and Spain nearly EUR 15m. Greece ranked 3<sup>rd</sup> with about EUR 11m and Portugal 4<sup>th</sup> with approximately EUR 345 000. The biggest non-EU players are Tunisia, Turkey and Albania however total exports from these countries are negligible compared to exports from the EU.

**Figure 5-26: Swiss imports of olive oil by country, 2017-2021; EUR 000**

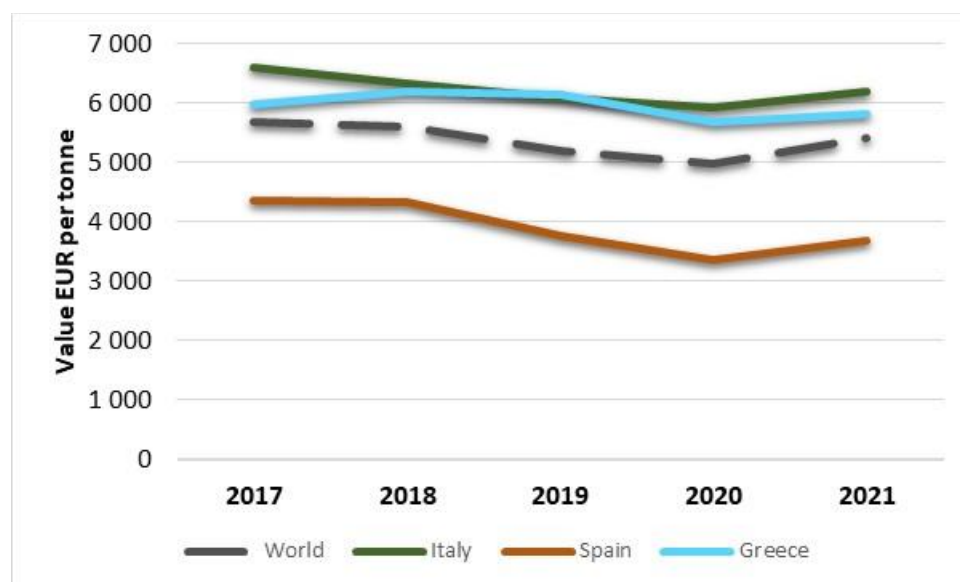


Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 1509.

In 2020, the world's average unit value per tonne of olive oil exports to Switzerland was around EUR 5 400. The unit value of Italian olive oil is higher than the world's average, at close to EUR 6 200 in 2021 as shown in Figure 5-27. The unit value of Spanish olive oil on the other hand is generally slightly lower than the world's average and was close to EUR 3 700 in 2021. It should be remembered that these two countries effectively define the global average value. The unit value of olive oil from Greece was much higher than the global average at about EUR 5 800 per tonne in 2021.

**Figure 5-27: The unit value of Swiss imports of olive oil by country, 2017-2021; EUR 000 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, EU olive oil products with GI protection are further granted full protection in Switzerland.

## Main competitors

As the EU is the main export of olive oil to Switzerland. As the country is not producing olive oil domestically to a reasonable degree there are no major domestic competitors. That said, it should be noted that a lot of olive oil is imported in bulk and subsequently bottled in Switzerland by domestic companies. Tunisia is the largest non-EU exporter of olive oil to Switzerland ranking as the 6<sup>th</sup> largest olive oil exporter; however, compared to the rest of the EU exports from Tunisia are negligible.

## 5.6.4 Specific market entry requirements

### Market Access and Entry

A general import permit for grains, fodder and foodstuffs is the main document required for clearance to export to Switzerland. The document must be completed in either German, Italian or French. A document is not required however for a consignment of less than 20kg.

**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 olive oil category (1509) from Spain to Switzerland***

[Results | Access2Markets \(europa.eu\)](#)

## **Standards, SPS measures, Labelling**

Olive oil must conform to the labelling requirements for packaged foods set out in section 4.2.3.

### **5.6.5 Distribution**

Figure 5-28 shows distribution channels by retail value for edible oils as a whole in Switzerland. With olive oil accounting for around 36% of all edible oils by volume, the data for edible oils reflects the distribution of olive oil. Modern grocery retailers account for about 92% of the total sales of edible oils with private labels from larger retailers being common. Within this category, supermarkets are the most popular channel and account for over half of the sales. Discounter retailers accounted for 22% of sales while hypermarket stores accounted for 13%. Traditional grocery retailers accounted for just 4% of edible oil sales in Switzerland while the e-commerce channels accounted for 3.2% of edible oil sales in the country.

The retail channel remains the main distribution channel for olive oil. Just under 90% of olive oil consumed in Switzerland is distributed through retail, with just over 10% passing through food service channels (mainly those offering Mediterranean cuisine).

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



Source: Euromonitor International: Packaged Food, 2022.

## 5.6.6 Challenges for EU products

The olive oil market in Switzerland is attractive for EU olive oil producers as consumers have a higher degree of disposable income coupled with a tiny production sector of olive oil leaving it reliant on foreign (mainly EU) imports. Trade agreements with Tunisia and Turkey open the possibility of an increase in olive oil exports from these countries; however, going forward the EU will continue to dominate olive oil exports. Demand for organic olive oil will also continue to grow which presents a challenge for non-organically produced EU olive oil products.

### Market Takeaway: Olive oil

**Consumption:** Consumption per capita continues to grow with a figure of 18.3 litres per capita in 2021 forecasted to rise to 19.9 litres per capita by 2026. The overall retail market for olive oil consequently will also see positive growth.

**Competition:** Nearly no competition from other exporters or Switzerland itself because it does not produce olive oil. Tunisia and Turkey present small but limited competitors.

**Distribution:** Retail dominant, with the product passing mostly through supermarkets, discounts and hypermarkets. E-commerce is also increasingly important.

**Challenges:** Adapting to increasing demand for organic olive oils coupled with partnering with one of the major retailer's COOP or Migros (which dominate the market) to ensure shelf space that will be visible to the majority of Swiss consumers.

**Opportunities:** The re-opening of the food service sector coupled with increased cross-border trade and commuting post-COVID-19 with Italy offers opportunities for increased olive oil sales in Switzerland.

## 5.7 Chocolate confectionery

### 5.7.1 SWOT analysis

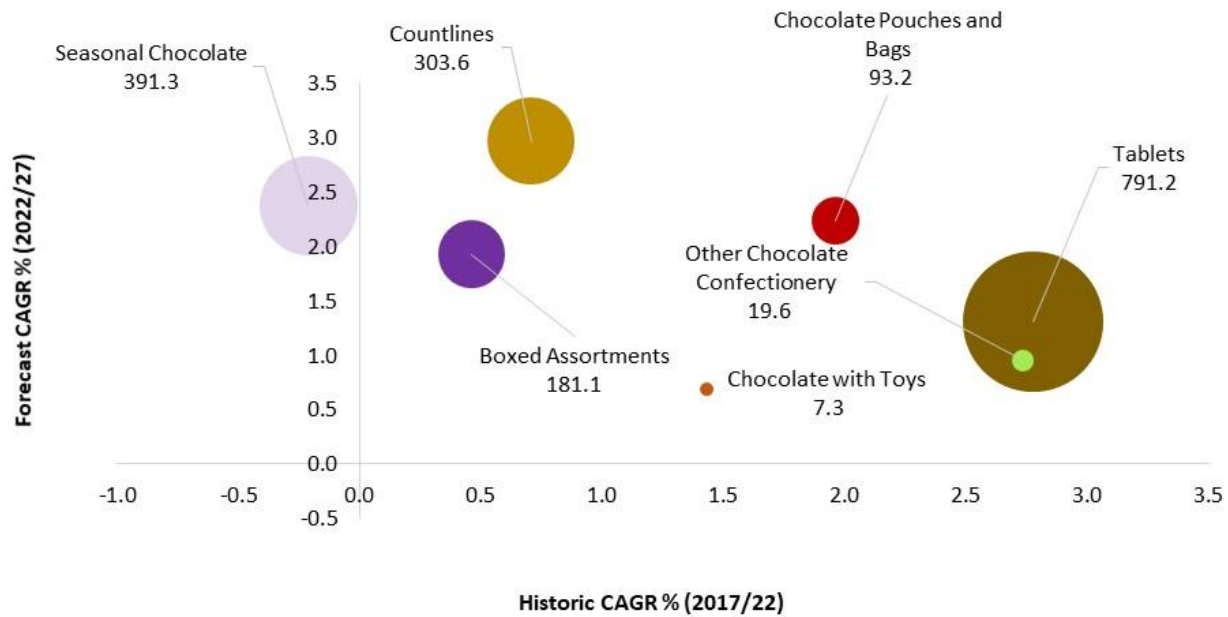
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> <li>▪ EU imports account for the majority of Chocolate confectionery imports by Switzerland.</li> <li>▪ Swiss consumers are amongst the highest consumers of chocolate per capita in the world.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Switzerland is a large producer of high-quality chocolate products.</li> <li>▪ Swiss consumers associate chocolate as a source of pride, meaning it will be additionally difficult for them to pivot to imported chocolate products.</li> </ul>
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> <li>▪ While domestically produced chocolate continues to dominate, imported products have increased their market share over the last ten years.</li> <li>▪ The rise of foreign retailers in Switzerland such as Aldi and Lidl have helped offer opportunities to imported products.</li> </ul>	<ul style="list-style-type: none"> <li>▪ UK and USA are the biggest competitors from outside of the EU.</li> <li>▪ The rise of self-scanning in major Swiss retailers impacts the key shelf space occupied by chocolate, which is typically next to the cashier to a negative degree.</li> <li>▪ Overall health concerns are negatively impacting the total consumption of chocolate products.</li> </ul>

### 5.7.2 Consumption

#### Evolution of consumption

In 2021 the total market size of the chocolate confectionery market in Switzerland was about EUR 1.7bn, which is quite high considering the population. As shown in Figure 5-29 the biggest market is the one for tablets with a size of about EUR 791 million, followed closely by seasonal chocolates with around EUR 391 million. Countlines are valued at EUR 303 million followed by boxed assortments at a value of EUR 181 million. Countlines are forecasted to be the fastest-growing chocolate product in the Swiss market with a predicted CAGR of 3% between 2021 and 2026. Seasonal chocolates are expected to be the second fastest-growing product with a forecasted CAGR of 2.4% followed by chocolate pouches and bags with a CAGR of 2.2%. All major chocolate products are expected to see positive growth albeit small hovering at a CAGR of 1-3% between 2021 and 2026.

**Figure 5-29: Evolution and forecast of chocolate confectionery market in Switzerland, 2016-2026; total retail value EUR million**



Source: Euromonitor International: Packaged Food, 2022.

## Consumer profile and purchase criteria

### Consumers

Swiss consumers consume a lot of chocolate, per capita consumption of chocolate in Switzerland is around 11.6 kg per person which is double that of consumption rates in neighbouring Germany, this ranks Switzerland as one of the highest consumers of chocolate in the world per capita. Swiss consumers benefit from a strong internal market for chocolate with notable producers of high-quality chocolate such as Lindt and Toblerone coming from Switzerland. Consumers of chocolate in Switzerland are spread out across all income and ethnic classes with the product being a source of pride for many Swiss consumers as one of the premier exports originating from the country.

With domestic products abundant and chocolate so widely-consumed, it is challenging to distinguish consumers of chocolate products imported from the EU. However, two very different consumer groups who are more likely to consume imported chocolate are price-sensitive consumers, and consumers who value variety and novelty. The first group is attracted by the fact that certain EU chocolate products tend to be cheaper than Swiss ones – most notably in the case of products sold in the cheaper foreign retailers Aldi and Lidl. The second group – consumers which value variety and novelty – tend to be drawn by flavours, sizes, characteristics and packaging options which either cannot be found among Swiss products, or are rare.

### Drivers and method of consumption

The key drivers that stand out for the consumption of chocolate confectionery products in Switzerland include:

- **High-quality domestic producers.** Swiss chocolate is world-renowned for its quality and brand image which acts as a source of pride for Swiss citizens. This coupled with a

normalised culture of chocolate consumption aids the performance of the products in the Swiss market. Some of the more popular chocolate brands in Switzerland include Villars and Toblerone. Swiss chocolate markets and shops are normal sights across the major urban centres of the country further compounding the widespread availability of the product across the country.

- **Culture.** Swiss chocolate culture is strong as chocolate is often consumed as a snack product, whether during lunch meals or by school children after school. Swiss chocolate features prominently in many advertisements aimed at promoting the country abroad and is a product that has grown to become a symbol of Switzerland. This further drives consumer to seek out and purchase (mainly domestic) chocolate products.
- **Return to normality.** Post-COVID-19, Swiss consumers are increasingly back to commuting and working from various offices and workspaces. Products such as chocolate benefits from this trend as chocolate products are small easy to carry snack food items which are enjoyed by Swiss consumers, due them being ingrained in the culture as mentioned above. Swiss consumers appreciate the many different varieties of chocolate products available to them which encourages them to diversify their chocolate consumption throughout their working week.

### Purchase criteria

Firstly, for chocolate products, it is important to note that Swiss consumers are accustomed to high-quality chocolate products with many associating chocolates with a premium luxury product. Swiss consumers further often associate chocolate as a Swiss-oriented product, that is to say, consumers rank their domestic chocolate amongst the highest quality in the world which makes it additionally difficult for imported chocolate brands to compete in the market. As Swiss consumers are accustomed also to reasonably priced chocolate of high quality, the additional price that can be attached to luxury EU chocolates in many markets across the world will be more difficult to utilise in the Swiss market.

Despite this, some Swiss consumers may look beyond the domestic production status of chocolate at other factors. Notable characteristics which these consumers may pay attention to include: ethical, sustainable and organic status of the chocolate; production methods (with artisanal and bean-to-bar production more in demand); and single-origin status of chocolate.

Many Swiss consumers will pay attention to certifications such as organic and fairtrade when purchasing chocolate products. Cocoa content is another factor that many consumers will seek out. As a general rule, it is expected that milk chocolate must contain at least 30% cocoa, while dark chocolate must contain at least 45% cocoa

### Recent market trends

The following recent market trends for chocolate confectionery stand out:

- **Reopening of the economy and the increased usage of e-commerce.** As the economy has reopened post-COVID-19 this has allowed for the reopening of chocolate speciality stores which are a common sight across many Swiss urban centres and within large Swiss public transportation hubs such as railway stations and airports. The return to more normalised foot traffic helps to sustain growth in the sale of chocolate in Switzerland, with both Swiss citizens and tourists being key consumers within these stores. While not a major channel of distribution at present, e-commerce sales of chocolate confectionery items are growing, aided by the implementation of e-commerce channels from some of

the larger retailers in Switzerland. While it was a channel that benefitted from the pandemic, it is remaining popular as the economy reopens.

- **The increased presence of foreign retailers.** While lagging far behind the presence of Migros and COOP, German retail chains Aldi and Lidl have both increased their presence in the Swiss market in recent years which aids the sale of imported chocolate in particular as these stores offer a wider variety of non-Swiss products at generally cheap prices. This further helps to explain why Germany is by far the largest exporter of chocolate to Switzerland, accounting for roughly half of exports. Indeed overall it can be recorded that Swiss consumers are increasingly consuming imported chocolates, although domestic chocolates remain preferred across the market.
- **Health consciousness.** While Swiss consumers remain high consumers of chocolate, there has been a notable slowdown in overall consumption rates in recent years with the rise of health consciousness post-COVID-19 being touted as one of the larger reasons behind this trend. Swiss consumers are increasingly seeking products with fewer added sugars or artificial ingredients. Dark chocolate is increasing in popularity largely as a result of this trend; in the French speaking part of the country, 2/3 of consumers state they prefer dark chocolate. Organic chocolate products are also increasingly in demand as are chocolate brands that can showcase the sustainability practises in their methods of production.

#### Chocolate on retailers' shelves in Switzerland

Both retail pricing and packaging vary based on the precise product. For example, boxed assortments typically use combinations of flexible plastic, folding cartons, other plastic trays, and aluminium foil; and retail prices start at CHF 5 for 100 grams. Pouches on the other hand are typically made of plastic and have zip or press closures; though it is increasingly common for products to be sold in bite-sized individual packs (often labelled as "mini"). Cartons are common for bars. For both these categories, products are generally priced in the range of CHF 1.50 to 4 per 100 grams. Paper and recyclable packaging is increasingly in popularity across all product categories due to sustainability concerns.

*Below: tablet range in a major retailer.*

*Below: seasonal (Christmas) chocolate range in a large retail chain.*

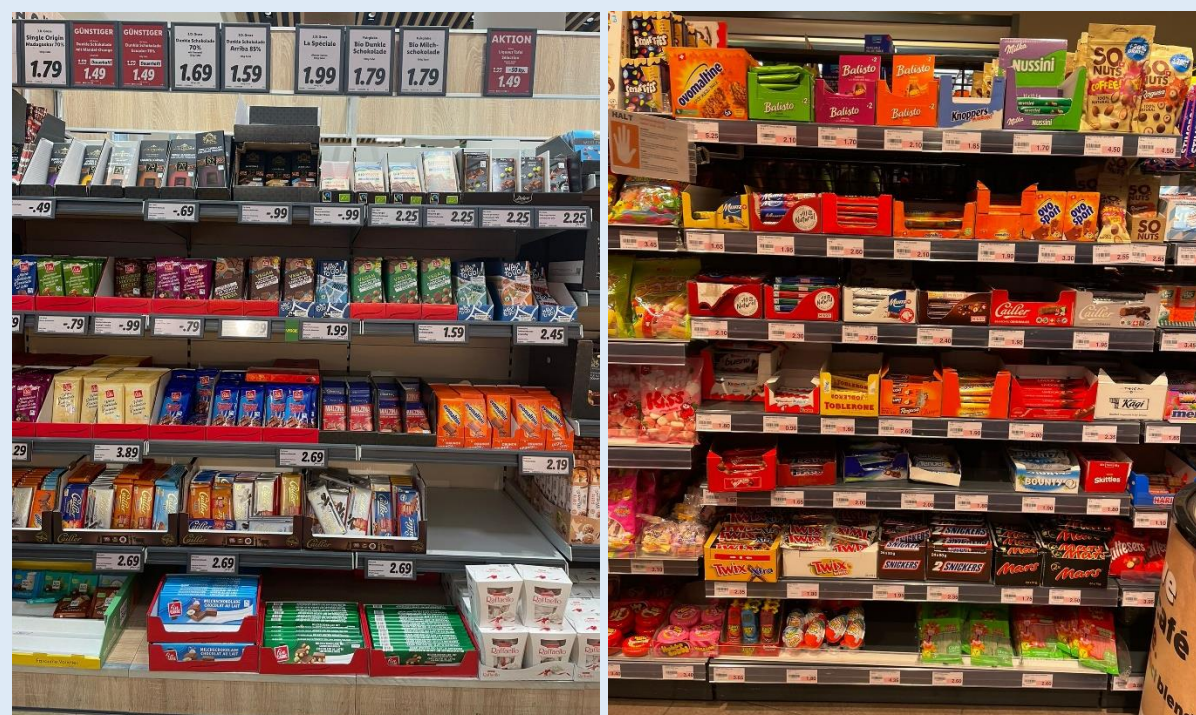


Particular attention tends to be paid to packaging on premium products, with designs, symbols and wording to communicate key attributes such as single-origin cocoa commonly used.

*Below: chocolate selection in a major retailer. Some of the premium products on the higher shelves clearly indicate their unique properties on the packaging.*



Below: left: chocolate selection in a discounter. Right: chocolate range in a smaller supermarket.



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### 5.7.3 Offer

#### Domestic production

The production of chocolate in Switzerland is a well-established industry that further acts as a source of pride for Swiss consumers as Swiss chocolate products are held in high regard both in Switzerland and globally. Some of the largest chocolate producers in the world are of Swiss origin which includes Toblerone, Lindt and multinational Nestlé to name a few. Belgian-Swiss company Barry Callebaut, which is a global leader in a wide range of cocoa and chocolate products (including key ingredients for chocolate confectionery) is also headquartered in Switzerland. While Switzerland does not produce any of the major ingredients found in chocolate such as cocoa beans and sugar it has not stopped the country in its ability to produce roughly 200 000 tonnes of chocolate per year. Manufacturing of chocolate is focused within the vicinity of larger urban centres such as Zurich and Bern.

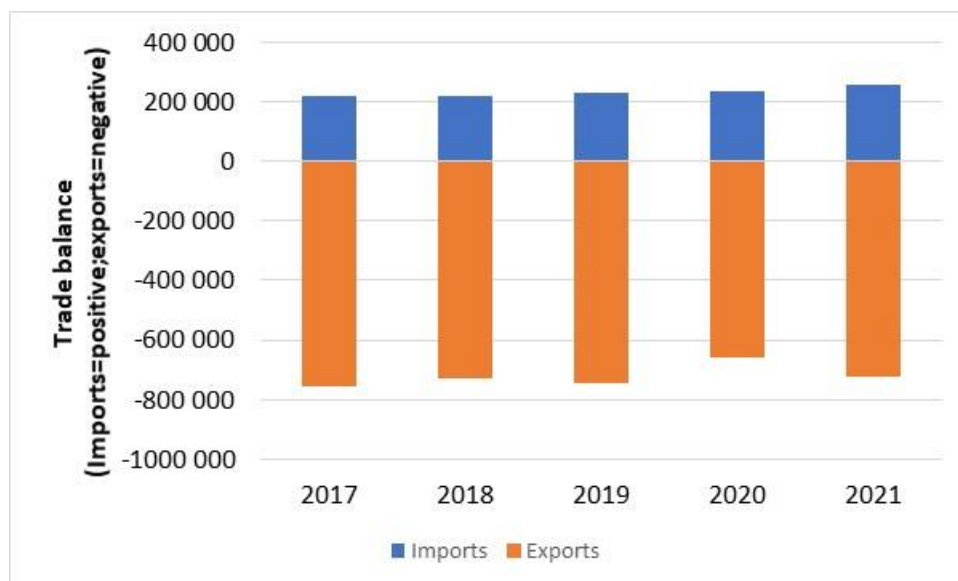
#### Imports and exports

Figure 5-30 shows that Switzerland is by a considerable distance a net exporter of chocolate, some 70% of chocolate produced in Switzerland is exported abroad.<sup>48</sup> In 2021 Switzerland

<sup>48</sup> Chocolate, The Federal Government of Switzerland, available at <https://www.eda.admin.ch/aboutswitzerland/en/home/gesellschaft/schweizer-kueche/schokolade.html>

exported EUR 722 million worth of chocolate which is a figure that has remained relatively consistent in recent years. Concerning imports, Switzerland imported EUR 258 million worth of chocolate in 2021 which represents a five-year high in value between 2017-2021. Total imports have steadily increased in recent years.

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

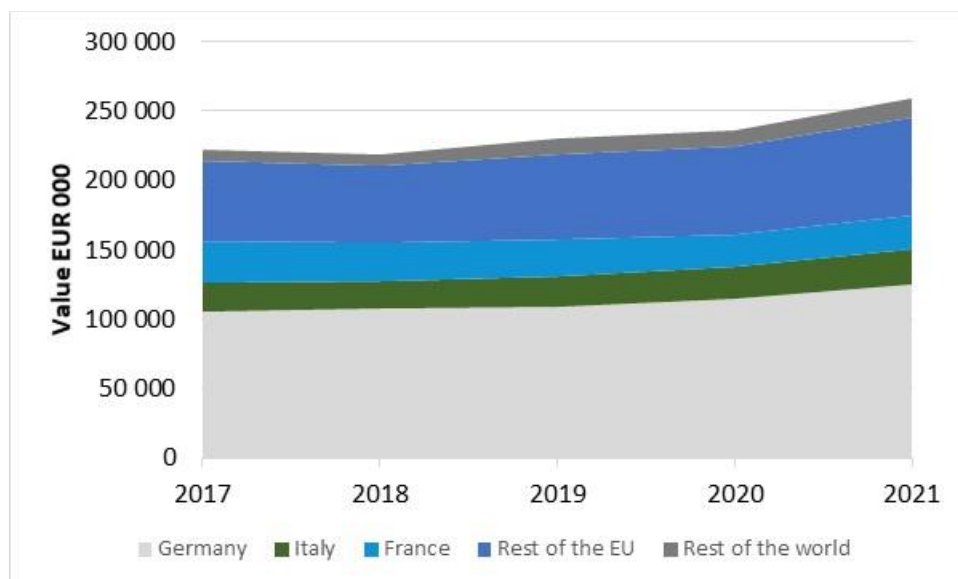


Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN codes 1806

In 2021 the three main exporters of chocolate confectionery to Switzerland were Germany, Italy and France. Germany was by far the main exporter of chocolate confectionery to Switzerland and exported chocolate worth more than EUR 124m (roughly half of all Swiss imports) as shown in Figure 5-31. Some way behind in second place, Italy exported about EUR 25m, followed closely by France with EUR 24m. Eight out of the top 10 chocolate exporters are from the European Union including Belgium, the Netherlands, Poland, Austria, Sweden and Spain.

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

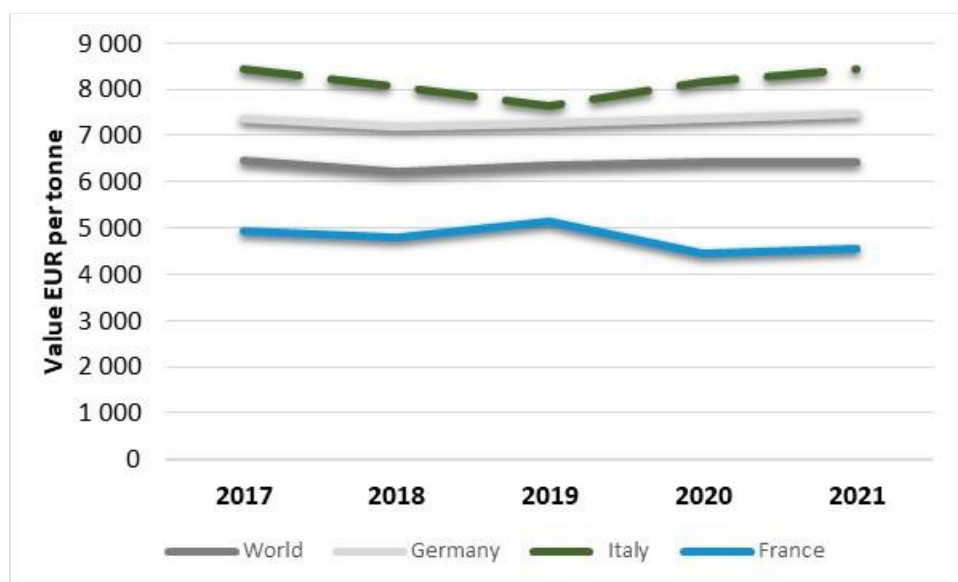


Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN codes 1806

The world's average unit value of chocolate confectionery exports to Switzerland was about 6 400 per tonne in 2021 as depicted in Figure 5-32. Most chocolate exported from the EU in 2021 had a unit price above the world's average. This is the case for example for Germany which had a unit value of about EUR 7 400 per tonne and Italy which had a unit value of EUR 8 500. The unit value of chocolate coming from France was lower than the global average at a unit value of EUR 4 600. Interestingly enough, at EUR 6 067 per tonne, the average unit value of Swiss exports of chocolate is slightly lower than that of its imports.

**Figure 5-32: Per unit value of Swiss 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 codes 1806

## EU GI products

As noted in section 4.2.4, EU chocolate and confectionery products with GI protection are further granted full protection in Switzerland.

## Main competitors

The main competitor for chocolate confectionery products are domestic Swiss producers. Swiss consumers associate their domestic chocolate products with high quality and authenticity which makes it additionally difficult for imported chocolate varieties to compete in the market.

## 5.7.4 Specific market entry requirements

### Market Access and Entry

Should the chocolate confectionery product not comply with Swiss technical standards, then a marketing authorisation for foodstuffs under the Cassie de Dijon principal document is 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 – general chocolate confectionery category (1806) from Spain to Switzerland***

[Search | Access2Markets \(europa.eu\)](#)

### **Standards, labelling**

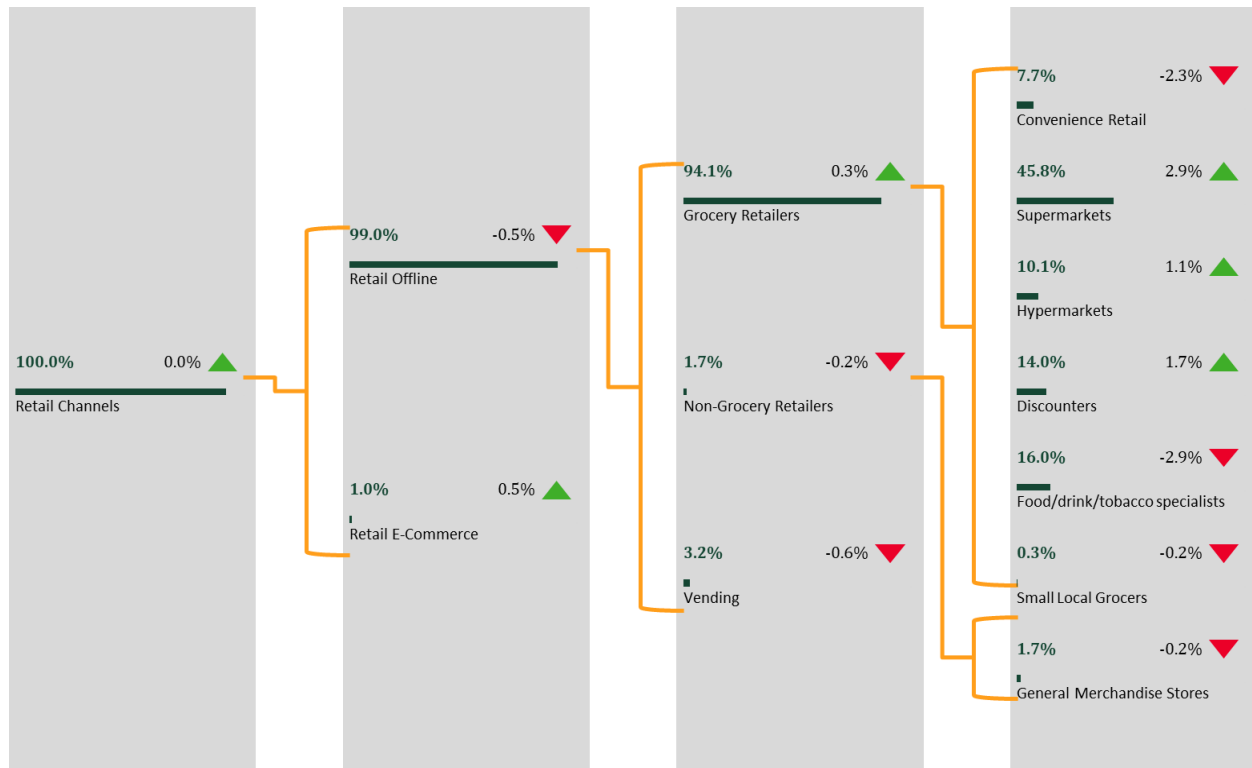
Chocolate products must conform to the labelling requirements for packaged foods set out in section 4.2.3

### **5.7.5 Distribution**

As shown in Figure 5-33 chocolate confectionery is nearly exclusively sold through store-based retailing, with a small percentage being sold via e-commerce. Even though its retail value remains very low, the importance of e-commerce is increasing. Grocery retailers accounted for 94.1% of chocolate confectionery sales in Switzerland with supermarkets accounting for 45.8% of sales. Food/drink/tobacco specialists accounted for 16% of sales followed by discounters with a 14% share and hypermarkets with a share of 10.1%. Vending machines accounted for 3.2% of total sales however this figure is declining.

The discounters Aldi and Lidl are two of the larger distributors of imported products. While these discounters generally sell private label products, in the chocolate area they have both a private label and branded offering – though the former tends to be more visible in the stores.

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



Source: Euromonitor International: Packaged Food, 2022.

### 5.7.6 Challenges for EU products

EU producers entering the Swiss chocolate market should keep in mind Switzerland in its own right is a market leader globally in chocolate production and many consumers will consider domestic chocolate brands as superior to those that have been imported from abroad. Partnering with major foreign retailers such as Aldi and Lidl provides one avenue to allow imported chocolates to stand out more when compared to Swiss chocolates although these chocolates must also be reasonably priced. Other strategies that may help imported products compete with the strong domestic competition include: utilising high quality ingredients to create unique flavours not currently on the Swiss market; emphasizing sustainability and ethical sourcing (potentially through strong branding); using artisanal production methods, single origin chocolate and/or bean to bar production methods and clearly communicating these; and providing excellent customer service in the case of direct-to-consumer sales.

**Market Takeaway: Chocolate confectionery**

**Consumption:** *Swiss consumers are amongst the largest consumers of chocolate in the world per capita, this is offset by the large domestic production base in the country for chocolate and the strong reputation that Swiss chocolate has both domestically and abroad.*

**Competition:** *Swiss chocolate is the biggest competitor for EU chocolates in the Swiss market, although there is limited competition from third countries such as the UK and USA.*

**Distribution:** *Nearly exclusively through store-based retailers such as supermarkets, discounters and convenience stores. Modern channels are gaining popularity as is the usage of e-commerce.*

**Challenges:** *Competition with well-established high-quality Swiss chocolate brands is the major challenge in this market for EU products, with many Swiss consumers proud of their domestically-produced chocolate.*

**Opportunities:** *The increased presence of foreign retailers such as Aldi and Lidl provide a new and growing channel for imported chocolate products. Opportunities may exist in the broader market for products that can differentiate themselves through a variety of factors.*

## 5.8 Beer

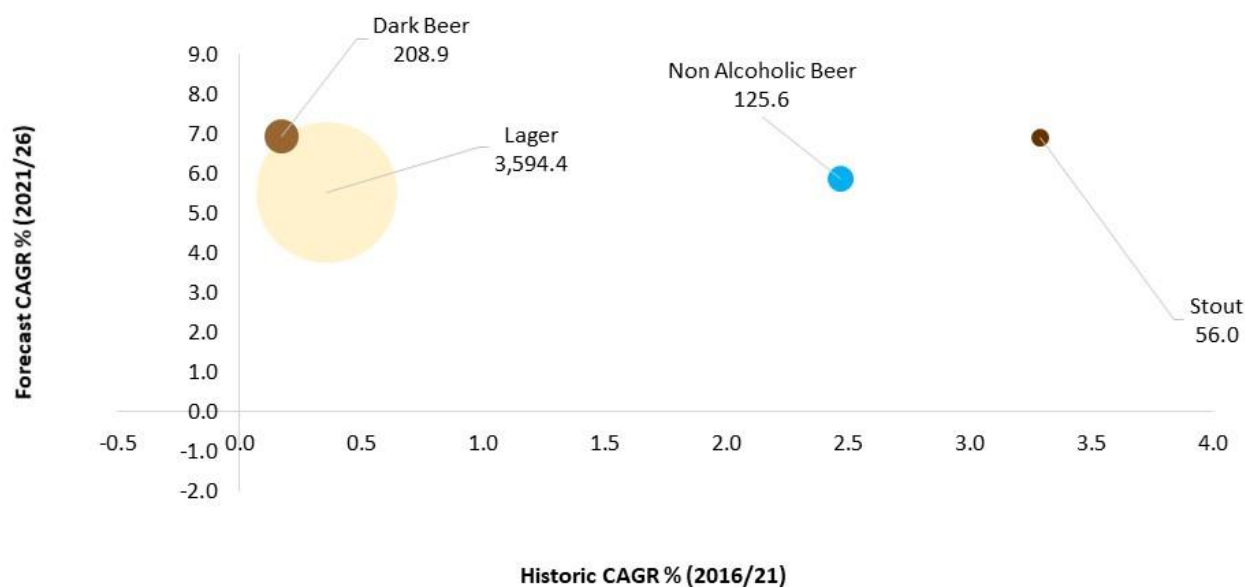
### 5.8.1 SWOT analysis

STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> <li>▪ EU imports of beer account for the absolute majority of beer imports by Switzerland.</li> <li>▪ Beer consumption in Switzerland is normalised and acceptable even in public places.</li> <li>▪ The market has opened up considerably over the last twenty to thirty years following the end of the cartel system.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Consumption is higher in German-speaking cantons with consumption lower in western French-speaking cantons.</li> <li>▪ Wine consumption is high in Switzerland and this impacts beer consumption.</li> <li>▪ Major retailer Migros (one of the two largest in the country) implements a ban on alcohol sales.</li> </ul>
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> <li>▪ Non-alcoholic beer consumption is growing quickly in the country and is forecasted to continue growing between 2021 and 2026.</li> <li>▪ Craft beer consumption is also growing with consumers seeking alternative tastes; and other niche products, including dark beer, are also gaining in popularity</li> </ul>	<ul style="list-style-type: none"> <li>▪ The UK and Mexico are the biggest threats from outside of the EU.</li> <li>▪ Domestic production is growing slowly, with craft beer production being a particular area of growth.</li> </ul>

### 5.8.2 Consumption

#### Evolution of consumption

As observed below in Figure 5-34, lager is by far the largest beer category in Switzerland by value with a value of EUR 3.5 billion. Lager is predicted to grow by a CAGR of 5.5% between 2021 and 2026. Dark beer is the second-largest beer product by value with a value of EUR 208 million. Non-alcoholic beer has a market value of EUR 125 million and is predicted to grow at a CAGR of 6.9% between 2021 and 2026, has also grown rapidly in the period up to 2021. Stout is the lowest-valued beer category with a market value of EUR 56 million and also a predicted CAGR of 6.9% between 2021 and 2026.

**Figure 5-34 the beer market in Switzerland (value, EUR million); 2016-2026**

Source: Euromonitor International: Alcoholic Drinks, 2021.

## Consumer profile and purchase criteria

### Consumers

Consumption of beer in Switzerland per capita is roughly 63 litres, which is in line with neighbouring France and Italy but considerably behind its neighbours in the north and west of Germany and Austria. This is the reflection of Switzerland being a country which straddles the border between the wine preferring western European countries and the beer-preferring central European countries, and as a result, both beer and wine are widely consumed in Switzerland. The legal age for drinking beer in Switzerland is 16 which is lower than in most European countries, this gives consumers access to beer at a much lower age resulting in consumers largely knowing which tastes they have a preference for at an early age. Consumers of beer can come from any income class or ethnicity although there is a notable increase in beer consumption within the German-speaking cantons compared to the French-speaking cantons; with German-speaking cantons accounting for around  $\frac{3}{4}$  of the country's breweries, including the largest Swiss brewery. The Italian canton of Ticino is often cited as enjoying both beer and wine equally. This further explains why most of the beer brands produced in Switzerland are located in German-speaking cantons.

### Drivers and method of consumption

Key drivers of beer consumption in Switzerland include: the desire to relax and socialise with friends; to have a non-wine or spirit-based beverage; and also the cheaper price of beer in Switzerland compared to wine and spirits. Swiss consumers also notably consume more beer products during events of national significance such as the country's participation in a global sporting event or during the 1<sup>st</sup> August, the country's national holiday. There are also several beer festivals which take place across Switzerland annually including in Zurich, Bern and Basel. Methods of consumption in Switzerland mirror that of other European countries such as the use of a pint litre glass for the majority of consumption although consumers may also purchase a 2-

litre jug of beer to be shared amongst friends. Swiss consumers generally say either *Santé* (French), *Prost* (German) or *Saluti* (Italian) with friends before consuming beer, and many parts of the country regard it as bad luck to not partake in this practise. The expression cheers are also well understood.

### **Purchase criteria**

Beer is expensive in Switzerland with the canton of Geneva being recorded as having the most expensive beer (EUR 8.20 on average for a pint of premium imported beer) compared to Thurgau (EUR 4.50 on average). This means consumers in the west of Switzerland where beer is generally more expensive will be more likely to switch to wine products compared to the centre of the country where beer is more affordable.

Consumers are well aware of imported (particularly EU) beers and hold many of the more popular brands in high regard. Typically, they will look at the quality and style of the beer when considering imported beers. More premium, complex beers are popular – as reflected to an extent by the increasing interest in craft beers. Indian Pale Ale (IPA) style beers have proven particularly in demand among Swiss consumers as well.

Consumers are increasingly seeking out non-alcoholic beer products which will continue to be an ever more important purchase criterion going forward in the country. As a result of this, multiple domestic producers such as Feldschlösschen and Brauerei Locher have introduced alcohol-free beers in recent years.

### **Recent market trends**

On-trade sales of beer were significantly impacted by the COVID-19 pandemic due to widespread closures in the spring and restrictions on capacity and consumption thereafter. Breweries also suffered heavy losses. Much as in other Western European countries, the strong contraction of on-trade sales resulted in a channel shift in favour off-trade sales. Even when cafés and restaurants were permitted to reopen in May, many consumers remained concerned about visiting busy public places. Thus, demand for beer off-trade rose significantly, although this was not enough to mitigate on-trade losses and overall volume sales declines in beer. It is expected that sales in the on-trade sector will continue to grow however during the current post-COVID period and a full return to pre-COVID-19 levels can be anticipated by 2024.

The ongoing trend toward low-alcohol and no-alcohol drinking continued to gather pace in Switzerland in 2020, and this was particularly evident in beer. In response to this, several new low/non-alcohol products emerged in retailers. Non-alcoholic beer is forecast to account for 10% of the beer market by 2026. The category is proving particularly popular among under 40s.

Craft beers have also increased greatly in popularity in recent years; and indeed this is a trend that some imported beers have taken advantage of. Scottish Brewery Brewdog and the Norwegian Lervig are two foreign craft breweries which have taken advantage of the craft trend in the country despite their overseas origins.

E-commerce continues to hold a marginal off-trade volume share in sales of beer in Switzerland, but an improvement in distribution and delivery in the country for online sales of beer boosted the performance of this channel. Moreover, e-commerce offers a wide range of products and speciality beers that cannot be found in all supermarkets or even specialist retailers.

## Beer on retailers' shelves in Switzerland

Approximate retail pricing for beer by segment in Switzerland is as follows:

- Economy – under CHF 1.30 per half litre
- Mid-range – between CHF 1.30 and 3.90 per half litre
- Premium – above CHF 3.90 per half litre

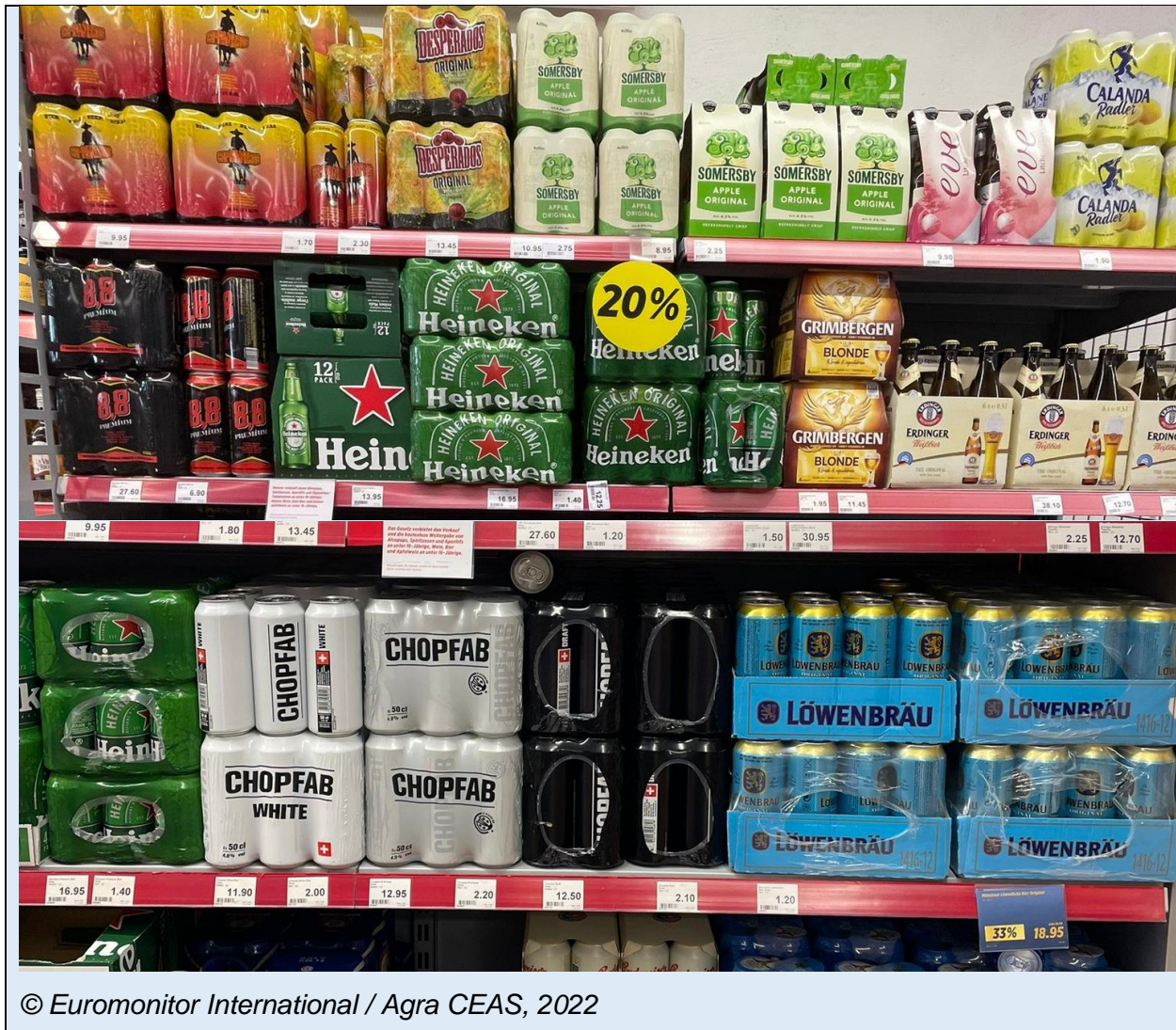
In terms of packaging, both metal cans and glass bottles are popular in roughly equal measure, with 330ml and 500ml the most common sizes. Glass in particular is seen as a good option by consumers from a sustainability point of view, even though its weight can make transportation and storage more complex. In the case of multipacks, there is increasing interest in and preferences for formats other than plastic – whether it be paper cartons or snap packs.

*Below: beers selection in a major retailer. Products are sold both individually and in multipacks.*



While beers are often sold individually, it is common for there to be price promotions on multipacks.

*Below: price promotions on multi packs in a major retailer.*



### 5.8.3 Offer

#### Domestic production

The beer market in Switzerland has suffered from the historic “cartel” which was established in the country during the period between 1935-1991. Under this system, many of Switzerland’s breweries divided the cantons into specific regions for their products and this further resulted in limited imports of beer from foreign markets. It also hampered innovation in the Swiss beer market and further explains why many of the major beer brands produced in Switzerland are not known globally, particularly when compared to e.g. beers produced in Germany and the Netherlands. The main opening up of the Swiss market took place at the beginning of the 21<sup>st</sup> century with Carlsberg and Heineken buying up some of the major producers found in Switzerland.

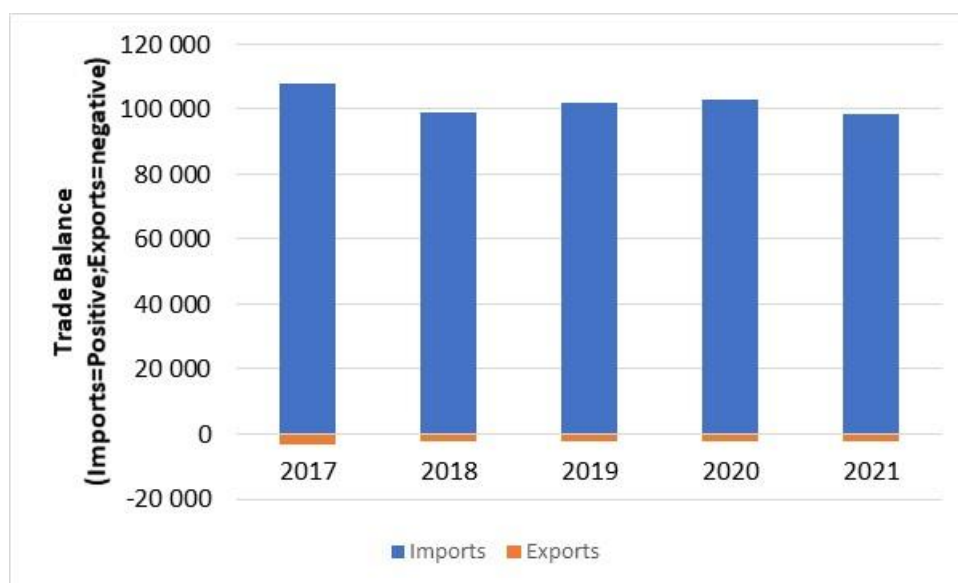
Today there are almost 1 300 breweries in Switzerland producing 3.4 million hectolitres of beer. However, around 950 of these are microbreweries which produce under 5% of the country’s beer; and upwards of 70% of the beer produced in Switzerland comes from the subsidiaries of Carlsberg and Heineken. Most of Switzerland’s beer production is focused in the centre and

northern regions of the country which coincidentally is also the biggest beer-consuming region of the country.

## Imports and exports

As shown below in Figure 5-35 imports have declined in recent years from a value of EUR 107 million in 2017 to EUR 98 million in 2021. Nonetheless, Switzerland remains a large net importer of beer with the country only exporting EUR 2.4 million worth of beer in 2021, with some of this also being a beer that has been re-exported.

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

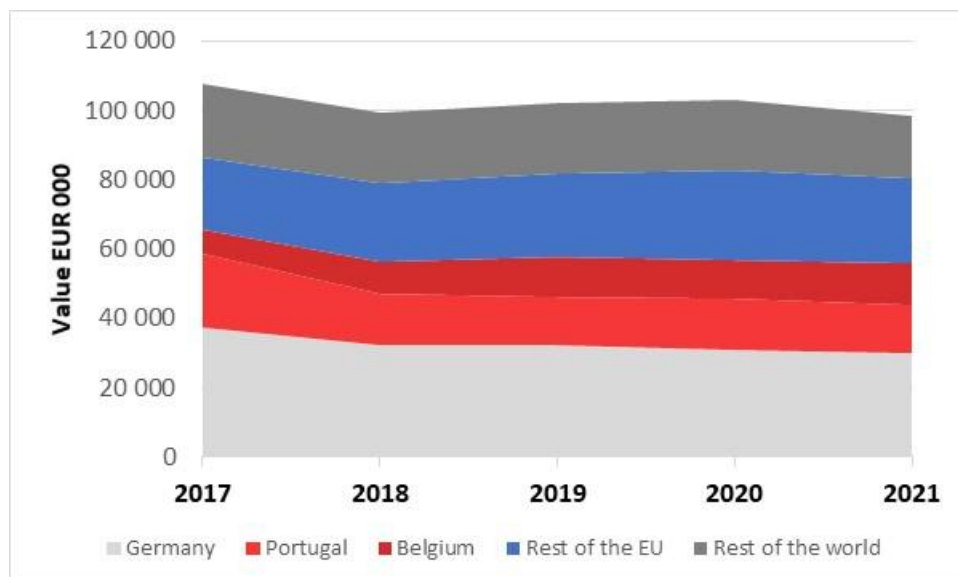


Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 2203.

Figure 5-36 shows that Germany is the largest exporter of beer to Switzerland with a total value in 2021 of EUR 29 million – around a third of total exports. Portugal is the second-largest exporter of beer with a total value of EUR 14 million followed by Belgium with a value of EUR 11 million. Other large exporters from the EU include Italy (EUR 6.2 million), France (EUR 5.6 million) and The Netherlands (EUR 5 million).

**Figure 5-36: Swiss imports of beer by country, 2017-21; EUR 000**

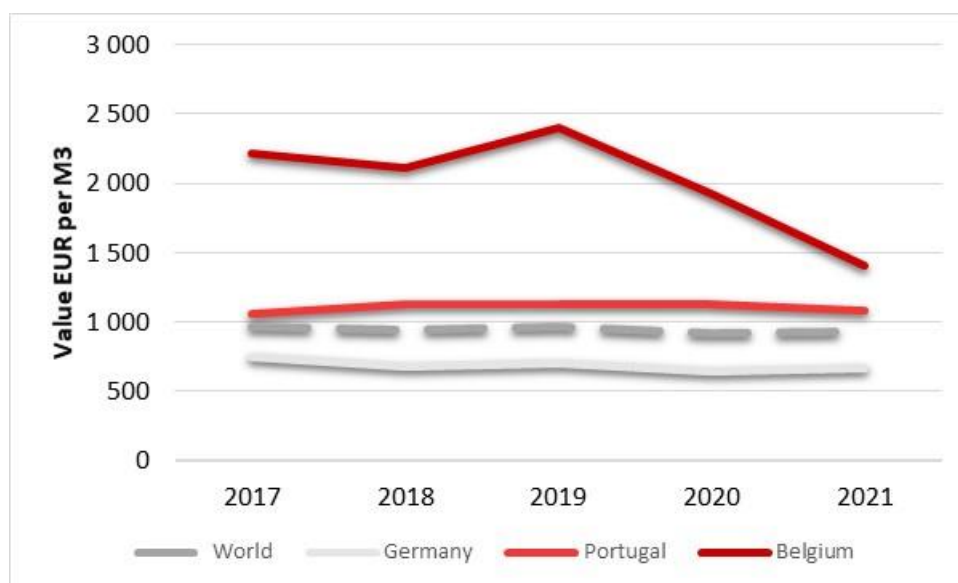


Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 2203.

Figure 5-37 shows the per-unit value of Swiss beer imports and further shows that Belgium has become the exporter with the highest unit value of EUR 1 400 per m<sup>3</sup>. Portugal had a unit value of EUR 1 100 per m<sup>3</sup> which is above the global average of EUR 930. Germany had the lowest unit value of the major exports of beer to Switzerland with a unit value of EUR 670.

**Figure 5-37: Per unit value of Swiss imports of beer for selected countries, 2017-21 (EUR per m<sup>3</sup>)**



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, EU beer products with GI protection are further granted full protection in Switzerland.

## Main competitors

The biggest competitors in the Swiss market for EU beers come from domestic production which is now largely foreign-owned by multinationals, following the opening up of the market in the 1990s and during the early 21<sup>st</sup> century. Competition from non-multinationals includes smaller independent producers such as Appenzell and Schutzengarten. These producers coupled with the small rise in craft beer producers constitute the biggest competition for EU beers in the Swiss market domestically. With regards to third-country exports, the UK, Mexico and Thailand are the biggest non-EU exports of beer to Switzerland.

## 5.8.4 Specific market entry requirements

### Market Access and Entry

Should the beer not comply with Swiss technical standards, then a marketing authorisation for foodstuffs under the Cassie de Dijon principal document is 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 – general beer category (2203) from Belgium to Switzerland***

[Results | Access2Markets \(europa.eu\)](#)

### Standards, labelling

Beer must conform with the labelling requirements set out in section 4.2.3. This includes, among others:

- Beer type
- Minimum ethyl alcohol by volume
- Bottling date
- Composition
- Mandatory warning
- Place of origin

It should be noted that non-alcoholic beer in Switzerland can contain up to 0.5% alcohol.

## 5.8.5 Distribution

The off-trade channel for beer consumption accounts for around 65% of the market by value. As shown in Figure 5-38, modern grocery retailers account for 90% of the off-trade volume of beer sold in Switzerland with supermarkets accounting for 57.1%. Hypermarkets account for 10% of

the share of beer sales in the off-trade market followed by discounters (14.2%) and convenience stores (7.5%). Overall traditional grocery retailers have a 7.4% share of the market. E-commerce remains a fairly small channel.

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



Source: Euromonitor International: Alcoholic Drinks, 2021

### 5.8.6 Challenges for EU products

Challenges for EU products within the Swiss market include competition with wine products which are preferred in certain regions of the country; strong local production; and the rise of the Swiss craft beer market coupled with a small number of independent brewers who are operating in the country. Swiss consumers further are increasingly seeking out new and non-alcohol variants of beer products, and this may impact the market for imported alcoholic beers. As a result of these factors, a lot of innovation is required by producers to resonate with Swiss consumers.

### Market Takeaway: Beer

**Consumption:** Rebounding post-COVID-19, all major beer categories are expected to see a positive CAGR between 2021 and 2026. Consumption of beer is higher in the German-speaking cantons than in the western French-speaking cantons with the Italian-speaking canton being roughly split between beer and wine consumption.

**Competition:** Small independent brewers coupled with a burgeoning craft beer scene in Switzerland present the biggest competition from domestic producers. Competition from outside of the EU mainly from the UK, Mexico and Thailand although the EU exports dominant total exports of beer to Switzerland.

**Distribution:** On-trade share of beer sales account for roughly a third of sales which is quite high compared to other neighbouring markets, and a big driver in the rebound in sales of beer in Switzerland post-COVID-19. Supermarkets are the largest distributors of beer from the off-trade sector although major retailer Migros implements a ban on alcohol sales.

**Challenges:** Competing with wine products coupled with pivoting production practised towards more sustainable and non-alcoholic beer products are the two major challenges for EU beer producers in the Swiss market.

**Opportunities:** The demand for non-alcoholic and alternative/craft beers are the two major opportunity areas in this market. The historically fragmented/regionalised domestic production and Swiss market (though now more consolidated following the entry of multinationals) provide more opportunities for imported beers in Switzerland.

## 5.9 Pasta

### 5.9.1 SWOT analysis

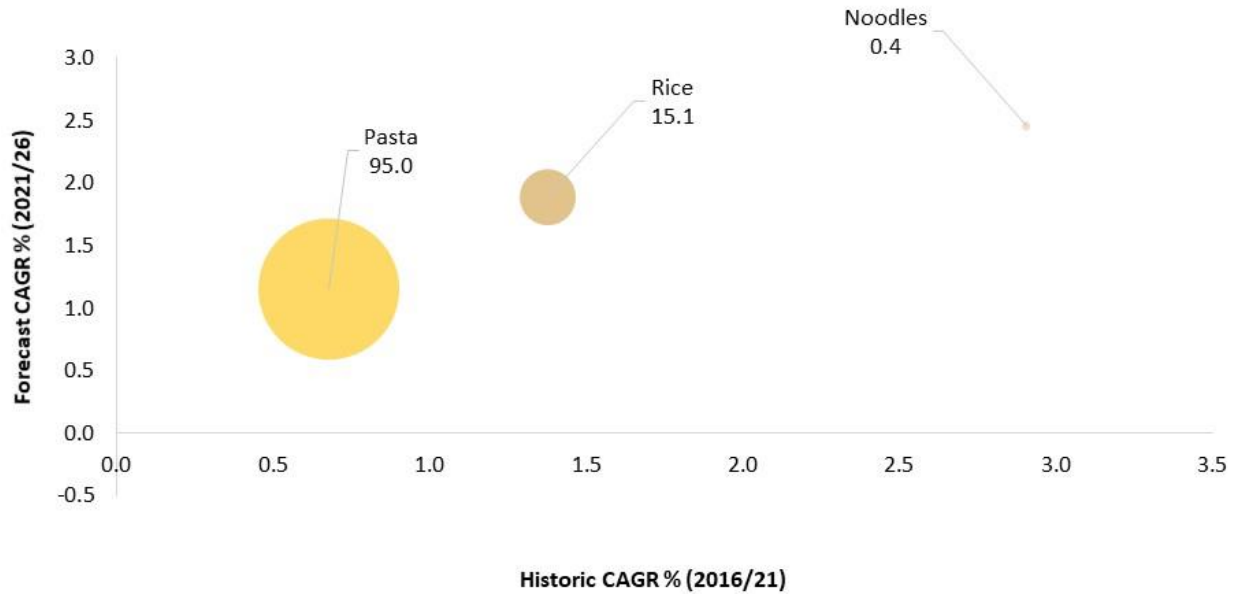
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> <li>Italy is the largest exporter of pasta to Switzerland, while the EU as a whole accounts for over 85% of total exports.</li> <li>Swiss consumers are amongst the highest per capita consumers of pasta globally.</li> </ul>	<ul style="list-style-type: none"> <li>Pasta is forecasted to grow at a slower rate than rice and noodles between 2021 and 2026.</li> <li>Rising durum prices have impacted pasta's image as a cheap nutritious food product in Switzerland.</li> </ul>
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> <li>Re-opening of the food service sector in Switzerland.</li> <li>Rising demand for organic and sustainably produced pasta products in Switzerland.</li> </ul>	<ul style="list-style-type: none"> <li>Swiss pasta producers aim mainly for the budget low-cost pasta market.</li> <li>Thailand and China are the biggest threat from outside of the EU, however total exports are minimal when compared to the EU.</li> </ul>

### 5.9.2 Consumption

#### Evolution of consumption

Figure 5-39 below shows that pasta is the most consumed staple with a volume of 90 000 tonnes in 2021, this category is forecasted to grow by a CAGR of 1.2% between 2022 and 2025. Rice is the second-largest category with a total volume tonnage of 15 000 in 2021 followed by noodles with a total tonnage of 4 000 in 2021. Noodles will be the fastest-growing staple category with a predicted CAGR of 2.5% between 2021 and 2026.

**Figure 5-39: Evolution and forecast of the pasta, noodle and rice market in Switzerland, (000 tonnes) 2015-2026**



Source: Euromonitor International: Packaged Food, 2021.

## Consumer profile and purchase criteria

### Consumers

Pasta is the most consumed product in Switzerland within the wider dry staple market of pasta, rice and noodles. Pasta is a common dish consumed in the country with Switzerland being further influenced by its domestic Italian population and the influence of Italian cooking practises within Switzerland; both of which aid pasta consumption. Consumption of pasta in Switzerland is over 11 kg per capita per year which ranks as one of the higher per capita consumption rates in Europe. Swiss consumers of all ages and ethnicities are drawn to pasta by a variety of factors including its relatively cheap price; the ability to stock pasta for a prolonged period (with Swiss consumers being particularly known for stocking several goods at all times in case of emergency); and the ability to incorporate pasta into a wide number of dishes. The latter factor in particular appeals to Swiss consumers who have higher incomes and/or a greater capacity to experiment with new dishes during their cooking practices.

### Drivers and method of consumption

Several drivers aid the sale and consumption of pasta in Switzerland, some of the larger drivers include:

- Impact of foreign culinary practises.** Culinary dishes in Switzerland are often influenced by cooking practised adopted in its larger neighbours such as Germany or Italy. The usage and consumption of pasta in Italy are the highest in the world which results in a particularly high demand for pasta within the border regions of Switzerland and cantons with a high Italian population such as Ticino. While the impact of Italian cooking and consumption habits in driving sales of pasta in Switzerland is clear (and indeed spreads beyond cantons

with an Italian connection), it is a pasta dish of German influence which stands as the most popular pasta dish of Swiss origin, this dish being *älplermagronen* (Alpine Macaroni).

- ***Desire to stock foods.*** Even before COVID-19, Swiss consumers (particularly those in more rural mountainous areas) were well accustomed to stocking foods in case of emergency (such as a road being blocked causing food delivery delays). This acts as a driver for goods such as pasta which are shelf-stable and can be stored for a prolonged period. Swiss consumers further appreciate in this regard the flexibility of pasta as it allows for a wider variety of meals and sauces to be utilised in a dinner meal without having to deviate away from the main ingredient - in this case, pasta.
- ***Pricing and quality.*** Food and beverages in Switzerland are expensive, even with a Swiss salary. Pasta is a relatively cheap and widely available product in the country which appeals to consumers of a lower income who appreciate the nutritional value of pasta as well as its durability. Swiss consumers further can avail of pasta of high quality and relatively cheap price due to the strong presence of products from Italian producers' in the country.

### Purchase criteria

Pasta in Switzerland is expected to be relatively affordable with several “budget” pasta being available in the market while more premium Italian pasta brands will cost more, albeit not by a large amount. Consumers may seek out pasta boxes which are popular amongst some of the larger retailers in Switzerland. These are boxes which contain pasta of a certain variety and one or a selection of common pasta sauces used in cooking. There is also a notable rise in demand for organic pasta products in Switzerland in line with a wider trend in rising demand for healthier products.

### Recent market trends

The outbreak of COVID-19 coupled with the rise in demand for organic products is the two bigger trends currently impacting the Swiss pasta market. COVID-19 led to a rise in total off-trade sales of pasta as consumers sought out products which could be stored for a prolonged period, coupled with products which could be stored on the shelf. Pasta saw a notable rise in sales due to this trend although the closures of on-trade restaurants which specialise in the production of pasta dishes (such as Italian restaurants) negatively impacted overall pasta sales to some extent. Recently, the rising cost of durum globally has led to rising pasta prices in Switzerland which threatens pasta's image as a cheap nutritious product amongst consumers, although total sales are expected to grow between 2022 and 2026.

### 5.9.3 Offer

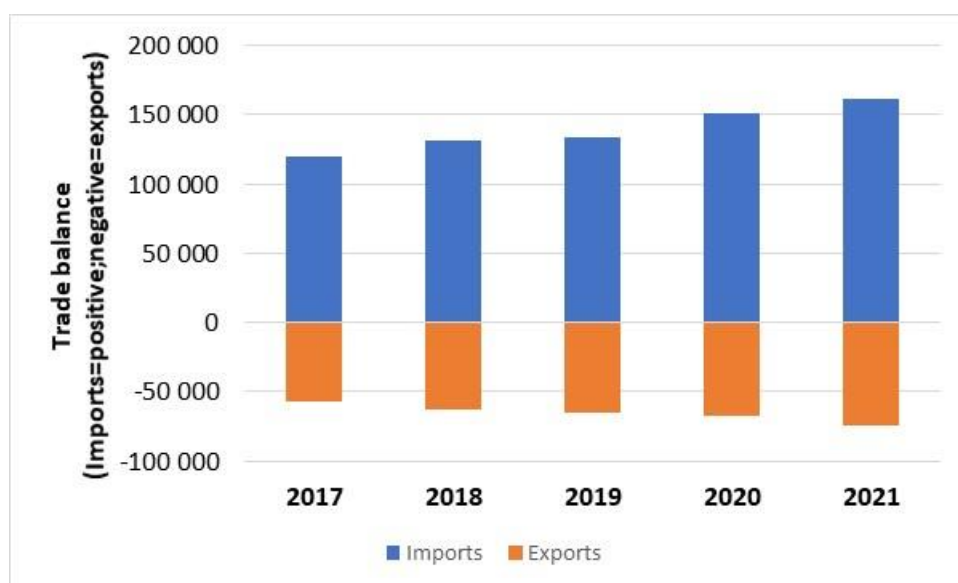
#### Domestic production

There are several smaller domestic pasta producers in Switzerland which include producers such as Kerner. Swiss pasta production was historically much higher with there being several local producers spread out across various cantons. However, improvements to transport links from neighbouring Germany and Italy have led to a wider influx of imported pasta which has resulted in a reduction in the total production of Swiss pasta. Overall, the majority of high-end premium pasta sold in Switzerland is imported, mainly from Italy while domestic pasta tends to be either sold under a private label or sold under a budget label to appeal to more cost-conscious consumers.

## Imports and exports

Figure 5-40 below shows the trade balance of Swiss pasta, noodles and couscous; and further shows that Switzerland is a net importer, with the country importing 160 000 tonnes of these products in 2021. Swiss exports came to a total volume of 73 000 tonnes in 2021.

**Figure 5-40: Trade balance (imports and exports) of pasta, noodles, and couscous in Switzerland, 2017-21; tonnes**

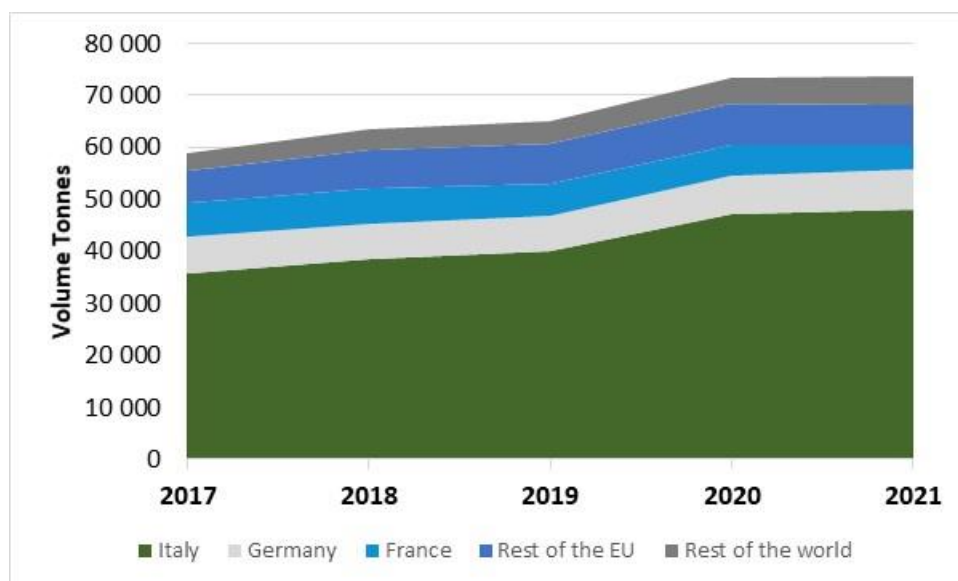


Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN codes 1902

Figure 5-41 shows that Italy is the largest exporter of pasta, noodles and couscous to Switzerland with the country exporting around 47 900 tonnes to Switzerland in 2021. Germany is the second-largest exporter followed by France. The absolute majority of imports are of EU origin.

**Figure 5-41: Swiss 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, EU pasta products with GI protection are further granted full protection in Switzerland.

## Main competitors

Main competitors in this market come from limited domestic production which mainly aims for the low-end cost competitive market for pasta. Outside of Switzerland, China and Thailand are the biggest exporters however exports from these countries are minimal compared to larger EU exports and focus on noodles rather than pasta.

## 5.9.4 Specific market entry requirements

### Market Access and Entry

Should the pasta not comply with Swiss technical standards, then a marketing authorisation for foodstuffs under the Cassie de Dijon principal document is required. If the pasta product contains any animal products (e.g. chilled stuffed pasta), then it must be registered with the intra-European TRACES database and have a veterinary health certificate for animal products.

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 Switzerland**

[Results | Access2Markets \(europa.eu\)](#)

## Standards, SPS measures, labelling

As the EU and Switzerland share a common SPS area, there are not checks at the border for pasta products arriving from the EU to Switzerland. Pasta products must conform to the labelling requirements for packaged foods set out in section 4.2.3

## 5.9.5 Distribution

Figure 5-42 outlines the main distribution channel for pasta in the Swiss market. Modern grocery retailers are the largest distribution channel accounting for 93.5% of all sales with supermarkets being the largest sub-channel with a share of 58.9%. Hypermarkets account for 15.5% of sales while traditional grocery retailers account for 2.9% of sales. The e-commerce channel accounted for 1.9% of sales in 2021.

**Figure 5-42: Distribution channel overview of pasta in Switzerland (2021); retail value**



Source: Euromonitor International: Packaged foods, 2021.

### 5.9.6 Challenges for EU products

Notable challenges in the Swiss market include competing with domestic production within the budget pasta market which is the main target of pasta produced in Switzerland. Imported pasta from the EU generally aims for the high-end market. Swiss consumers increasingly seek out organic pasta and pasta which have been produced sustainably which acts as a further challenge as some producers may need to pivot production practises and labelling to appeal to Swiss consumers.

#### **Market Takeaway: Pasta**

**Consumption:** *Pasta is the most consumed dry staple in Switzerland and overall consumption rates per capita are amongst the highest in the world. The proximity to Italy and cross-border trade further drive pasta sales in Switzerland.*

**Competition:** *Limited competition from domestic producers aiming for the budget pasta market, third country noodles offer also limited, indirect competition.*

**Distribution:** *Modern grocery retailers are the main channel of distribution for pasta with 93.5% of sales coming from this channel.*

**Challenges:** *Adapting pasta products to the changing demands of Swiss consumers relating to demand for organic and sustainably produced pasta offers a challenge for producers in the market; as is the price focus of the mass market.*

**Opportunities:** *The re-opening of the food service sector coupled with high pasta consumption per capita and limited domestic production of premium pasta are the biggest opportunities in the Swiss pasta market.*

## 5.10 Processed Meat

### 5.10.1 SWOT analysis

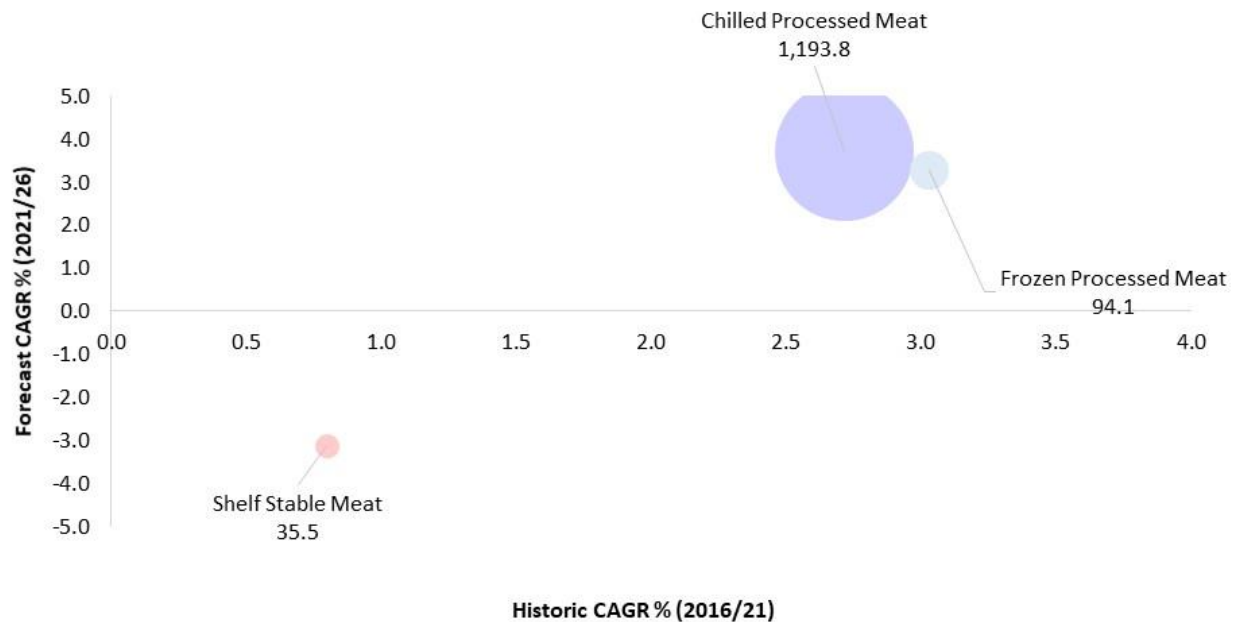
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> <li>▪ EU accounts for over half of all processed meat exports to Switzerland.</li> <li>▪ Popular Swiss processed meat products are also mass-produced within the EU (sausages, bacon etc).</li> </ul>	<ul style="list-style-type: none"> <li>▪ As is the case with fresh meat, there is a preference for processed meats of Swiss origin among consumers.</li> <li>▪ Total consumption is expected to decline as consumers make efforts to reduce meat consumption.</li> </ul>
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> <li>▪ Demand grows during the summer months as Swiss consumers engage in activities such as BBQs (<i>Brotle</i>)</li> <li>▪ Organic and sustainably produced processed meats will resonate with Swiss consumers.</li> </ul>	<ul style="list-style-type: none"> <li>▪ The influx of processed meats from the USA, Australia and Uruguay.</li> <li>▪ Increasing demand for plant-based alternative products.</li> </ul>

### 5.10.2 Consumption

#### Evolution of consumption

The chilled processed meat category has the biggest market size of the processed meat category in Switzerland as depicted in Figure 5-43. The category had a total retail value of EUR 1.19 billion in 2021 and is further expected to grow by a CAGR of 3.7% between 2021 and 2026. The chilled processed meat category essentially dominates the Swiss processed meat market as the second highest category by retail value, frozen processed meats, have a retail value of just EUR 94 million, followed by the smallest category by retail value shelf stable meat with a retail value of EUR 35 million.

**Figure 5-43: Evolution and forecast of the Processed meat market in Switzerland, 2016-2026; retail value EUR million**



Source: Euromonitor International: Packaged Food, 2021.

## Consumer profile and purchase criteria

### Consumers

Consumers in Switzerland overwhelmingly consume chilled processed meat products such as sausages, bacon or pepperoni. Consumers appreciate the convenience of these products as meats which can be prepared and consumed quickly. However, an ever-growing number of Swiss consumers are growing concerned about issues relating to animal rights and the welfare of the animal during the meat production process. Swiss consumers further are increasingly seeking out plant-based alternatives to processed meat products or reducing their total consumption of meat products in general, this is particularly seen among consumers of a younger age. Older consumers and cost-sensitive middle-aged consumers are key consumers of processed meats in Switzerland although even amongst these age groups there is a growing concern about the health impact of heavily processed meat consumption.

### Drivers and method of consumption

Due to the Covid-19 pandemic and related restrictions and lockdowns, consumers have increasingly spent time at home which aided the consumption of processed meat products which could be stocked and stored for a prolonged period compared to fresh meat products. Sausages and bacon are the two more preferred processed meat products in Switzerland these products are commonly consumed as either a breakfast or lunch meal, although consuming them for dinner is not entirely rare either. During the summer months, there is a notable rise in demand for processed meat products as Swiss consumers flock to the outdoors to partake in BBQS (*Brotle in Switzerland*) with sausages, bacon and processed poultry meat being commonly consumed at these social gatherings. Some other social gatherings encourage the consumption of processed meats such as charcuterie which are particularly popular within the Swiss alpine region. Notable

processed meats found on a Swiss-styled charcuterie board include prosciutto and Bündnerfleisch which is a Swiss processed food delicacy.<sup>49</sup>

### **Purchase criteria**

Consumers of processed meat products in Switzerland appreciate the “Swissness” of many private-label processed meat brands and will often seek these out in lieu of imported processed meat products. This criterion is particularly profound as many consumers have reservations about consuming too much-processed meat in general, the Swiss origin of processed meat helps to alleviate some fears surrounding the welfare of the animal and the overall quality of the product. As mentioned above, many Swiss consumers will associate charcuterie boards with the national processed meat cut product of Bündnerfleisch. The product is widely consumed in Switzerland and is a source of pride for consumers, particularly from the canton of Graubünden. Swiss consumers further appreciate cuts of processed meats which compliment social gatherings for example sausages for BBQs (*Brotles*) and prosciutto for Swiss charcuterie boards.

### **Recent market trends**

The outbreak of COVID-19 helped to alleviate the decline in sales for frozen and shelf-stable processed meat products in Switzerland as consumers sought out products which could be stored for a prolonged period and could be prepared and consumed quickly. Swiss consumers post-COVID-19 have returned to a wider trend of increasingly preferring to purchase fresh meat products from local establishments instead of processed meats from the larger retailers in the country. Going forward, total growth in the market is forecasted to be quite modest as consumers – particularly those of a younger age - continue to prefer to abstain from meat consumption or at least reduce their meat intake when compared to older consumers. Due to an increasing number of consumers reducing their total intake of meat products, processed meat is further being negatively impacted as consumers which rarely consume meat are more likely to seek out fresh meat products instead of processed meat products. Reductions in the level of intake of meat and processed meat may ultimately lead to greater importance being placed on quality – partly helping to explain the forecast growth in market sizes over the next years.

## **5.10.3 Offer**

### **Domestic production**

Domestic production of processed meat is focused on catering for the domestic market as total exports of processed meat from Switzerland are small and focused on exports to neighbouring countries. Micarna (Migros) is the largest producer of processed meat in Switzerland with a market share of just over 20% of the market, closely followed by Bell which also has a share of around 20%. A large amount of the processed meats sold in Switzerland are produced by subsidiaries of the two larger retailers of Migros and COOP which account for the majority of the processed meat market.

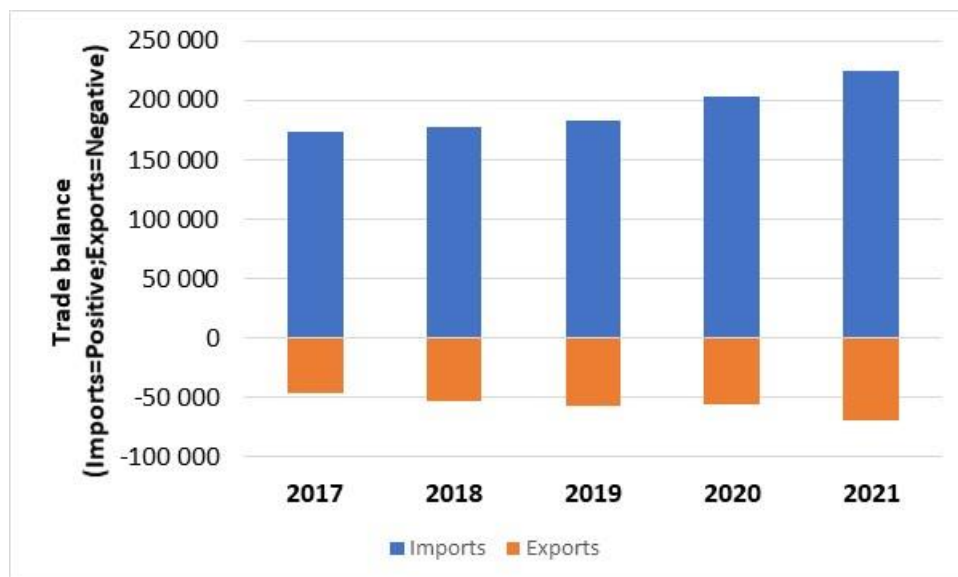
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<sup>49</sup> The Swiss delicacy you need for your next charcuterie board, Mashed, available at <https://www.mashed.com/624753/the-swiss-delicacy-you-need-for-your-next-charcuterie-board/>

## Imports and exports

Switzerland is a net-importer of processed meat as shown in Figure 5-44. In 2021, Switzerland imported a total of EUR 224 million worth of processed meat which is a significant increase from the EUR 172 million total figure which was recorded in 2017. Total exports from Switzerland in 2021 came to a value of EUR 69 million.

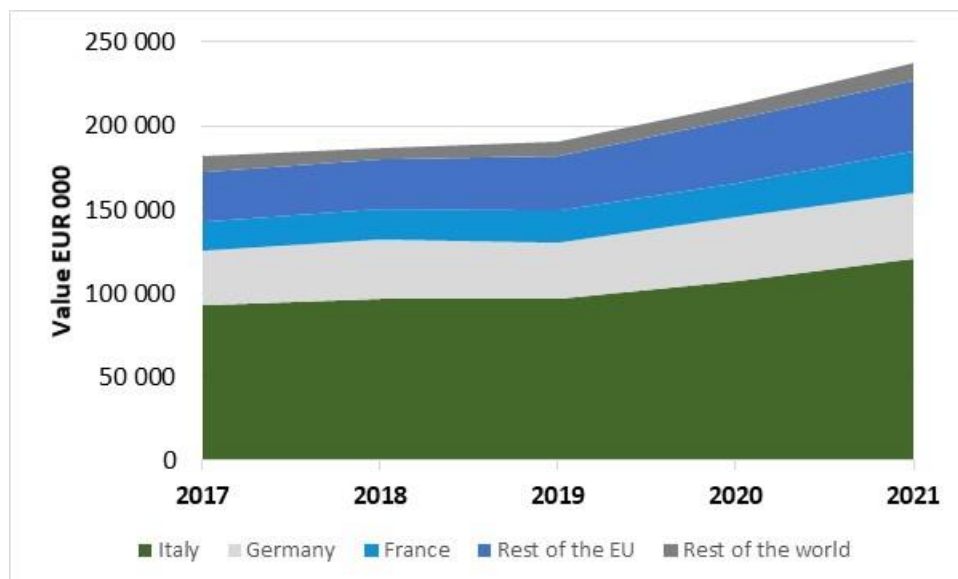
**Figure 5-44: Trade balance (imports and exports) of Processed Meat in Switzerland, 2017-21; value EUR 000**



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

Data for CN code 0210, 1601, 1602.

The largest exporter of processed meat to Switzerland is Italy which exported a total of EUR 120m worth of processed meat in 2021, followed by Germany (EUR 39m) and France (EUR 24m) (Figure 5-45). Other large EU exporters of processed meat to Switzerland include Spain, Austria and The Netherlands. although there are also many large non-EU exporters of processed meat which include Thailand, Brazil and the UK.

**Figure 5-45: Swiss imports of processed meat by country, 2017-21; EUR 000**

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

Data for CN code 0210, 1601, 1602.

## EU GI products

As noted in section 4.2.4, EU processed meat products with GI protection are further granted full protection in Switzerland.

## Main competitors

Domestic producers are the biggest competitors for EU processed meat products in the Swiss markets as these products enjoy the label of being of Swiss origin which is a key purchasing criterion for many Swiss consumers. Outside of Switzerland, the biggest competitors come from [Thailand](#), [Brazil](#) and the [UK](#) though these are all fairly minor exporters of processed meat products to Switzerland.

## 5.10.4 Specific market entry requirements

### Market Access and Entry

Importers and operators of fresh meat products exported to Switzerland must be registered within the wider EU TRACES database. The competent authority regarding animals and animal products is the Federal Food Safety and Veterinary Office (FSVO) while the authority responsible for phytosanitary control is the Federal Office for Agriculture (FOAG), Federal Plant Protection Service. The importer will also need for certain fresh meat products such as poultry and bovine meat, a general import permit for agricultural products. If you are exporting a product labelled as “high-quality beef” then a certificate of high-quality beef which meets Swiss standards must be accompanied.

For individuals carrying meat into the country, there are limits on the amount which can be brought into Switzerland duty-free. This limit is 1 kg per person, per day. The aim of this measure is to reduce the influx of cheaper meat products from entering the Swiss market.

Tariffs for imported processed meat vary based on the cut. Tariff rate quotas exist for certain volumes. Please consult the link below for full details. The classification of the product by Swiss customs will affect the tariff applied and some cases of classification into categories taxed at higher rates have been reported – attention should therefore be paid to the classification.

**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 –category (0201) from Spain to Switzerland***

[Search | Access2Markets \(europa.eu\)](#)

### **Standards, SPS measures, labelling**

The EU and Switzerland share a common SPS area, as such, SPS checks on animals arriving or transiting through Switzerland from the EU have been abolished at the border, and certain intra-EU documents such as registering with TRACES (see above) are required.

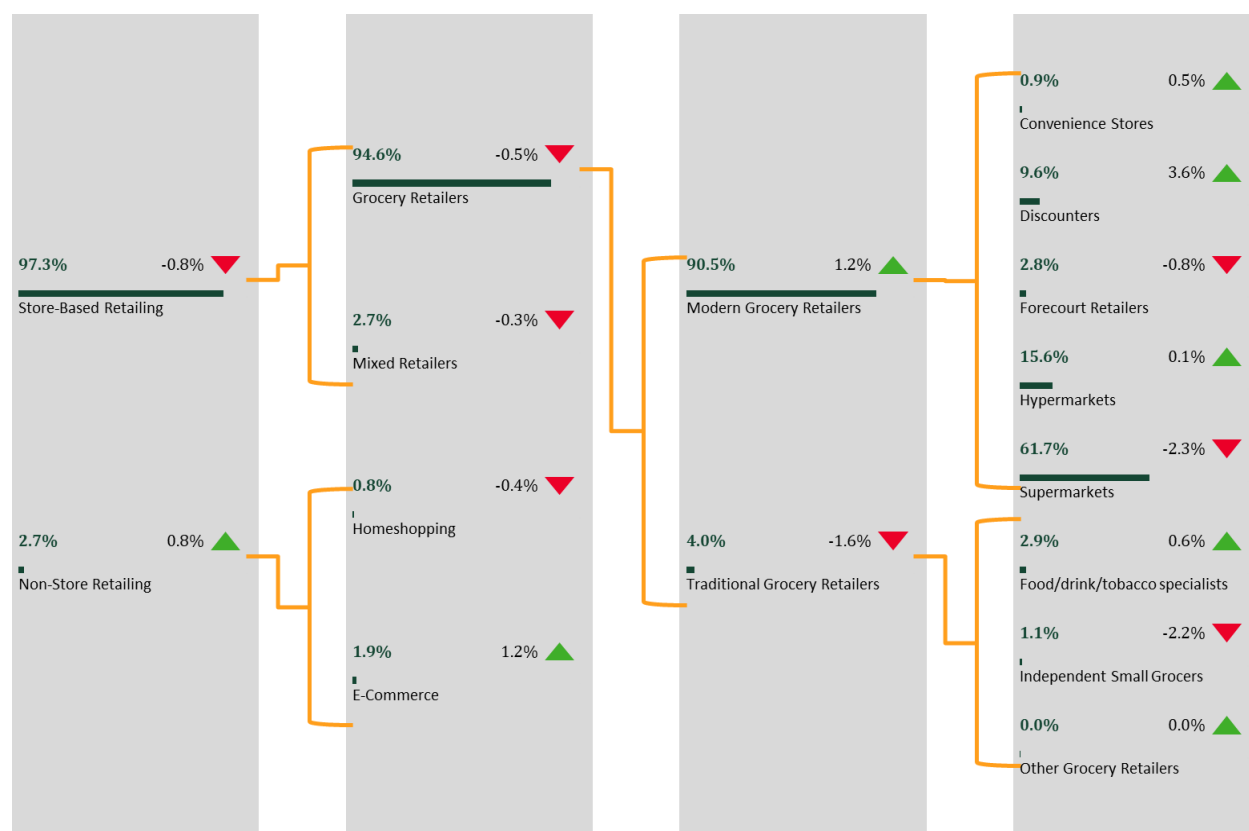
Swiss labelling requirements for meat differ slightly from the EU. The following information, if relevant, must be clearly labelled on meat products :

- meat produced using certain hormonal or non-hormonal performance-enhancing substances.
- meat from rabbits kept under conditions prohibited in Switzerland

### **5.10.5 Distribution**

As shown in Figure 5-46 modern grocery retailers make up the absolute majority of processed meat sales in Switzerland with a 90.5% share of sales. Traditional grocery retailers accounted for 4% of sales. Supermarkets accounted for 61.7% of all processed meat sales which aides in the sale of private-label processed meat products. Hypermarkets accounted for 15.6% of sales followed by discounters with a share of 9.6%.

**Figure 5-46: Distribution channel overview of processed meat in Switzerland (2021); retail value**



Source: Euromonitor International: Packaged Food, 2021.

## 5.10.6 Challenges for EU products

Challenges for EU products include competing with domestic Swiss processed meat products which benefit from the label of being of Swiss origin - an important criterion for many Swiss consumers. EU exports account for the majority of exports of processed meats to Switzerland. There is minor competition from processed meat products from countries such as Thailand, Brazil and the UK among others.

### **Market Takeaway: Processed Meats**

**Consumption:** Consumption of processed meat is high in Switzerland. However, it is declining amongst younger consumers who hold more reservations surrounding meat consumption and also environmentalist consumers further are increasingly switching to plant-based alternative products.

**Competition:** Considerable domestic production coupled with a limited amount of exports from Thailand, Brazil and the UK.

**Distribution:** Mainly sold through modern grocery retail outlets with supermarkets accounting for 61.7% of all sales. Hypermarkets and discounters are the next biggest distributors in the market.

**Challenges:** Strong competition with Swiss processed meat products combined with the influx of processed meats from third countries are a key challenge, as is the need to compete in a market which is increasingly abstaining from meat consumption.

**Opportunities:** Organically or sustainably produced processed meat products will stand out and appeal to many Swiss consumers. Demands grow during the summer months as consumers spend more time outside engaging in social activities such as BBQs (Brotle).

## 5.11 Processed fruit and vegetables

### 5.11.1 SWOT analysis

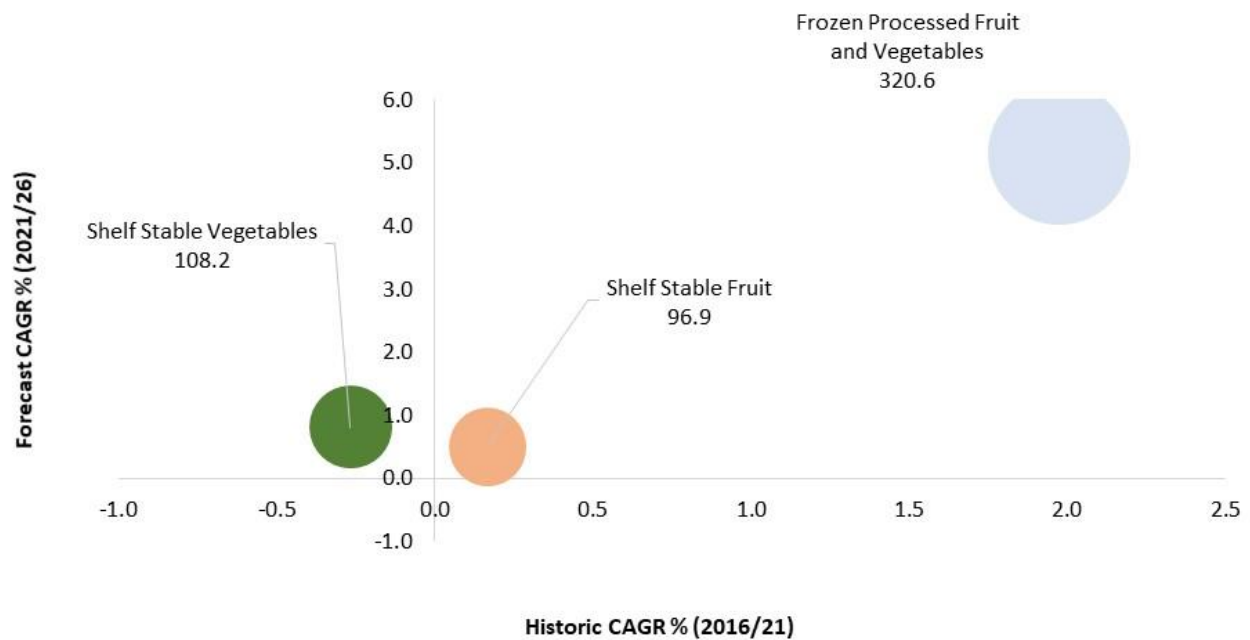
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> <li>Swiss consumers are accustomed to the practise of storing foods for a prolonged period which has aided the development of the processed fruit and vegetable market.</li> <li>The frozen processed fruit and vegetable market accounts for the majority of the market.</li> </ul>	<ul style="list-style-type: none"> <li>Consumers increasingly switching back to fresh fruit and vegetable consumption as the Swiss economy fully re-opens post-COVID-19.</li> <li>Shelf-stable fruit and vegetable products are considered unhealthy by many Swiss consumers.</li> </ul>
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> <li>Demand for alternative processed fruit and vegetable products which incorporates natural ingredients is growing and is the main opportunity area in the country.</li> <li>Labelling and showcasing the usage of natural ingredients is a growing pricing criterion in Switzerland.</li> </ul>	<ul style="list-style-type: none"> <li>Swiss retailers COOP and Migros account for the majority of the brand share of processed fruit and vegetable products in Switzerland.</li> <li>Overall consumer base continues to become ever more health conscious which is negatively impacting the total sales of certain processed fruit and vegetable products.</li> </ul>

### 5.11.2 Consumption

#### Evolution of consumption

Frozen processed fruit and vegetables have the highest retail value at EUR 320 million and are expected to grow at a CAGR of 5.1% between 2021 and 2026 which will see them consolidate their position as the largest processed fruit and vegetable category in Switzerland. Shelf stable fruit and vegetables are the second largest processed fruit and vegetable category in Switzerland with a retail value of EUR 108 million as shown below in Figure 5-47. Shelf-stable fruits have a retail value of EUR 96 million and are forecasted to remain the lowest-valued processed fruit and vegetable category by 2026.

**Figure 5-47: Evolution and forecast of the processed fruit and vegetable market in Switzerland, 2016-2026; retail value, EUR million**



Source: Euromonitor International: Packaged Food, 2021.

## Consumer profile and purchase criteria

### Consumers

Consumers of processed fruit and vegetables in Switzerland can come from any ethnic or income class as the product is widely available throughout Switzerland and is reasonably priced compared to the often-quiet expensive fresh fruit and vegetable products on offer. Swiss consumers who are health conscious have helped frozen processed fruit and vegetables to become the largest processed fruit and vegetables category in Switzerland as there is a perception that frozen processed fruit and vegetable products are healthier than shelf-stable alternatives. Consumers across Switzerland generally can store frozen fruit and vegetable products for a prolonged period via refrigerators and freezers.

### Drivers and method of consumption

Swiss consumers appreciated products which can be stored for a prolonged period even before COVID-19; this was a common practise in the country and encouraged by the government. Consumers living in mountainous regions of the country are more prone to food shortages as the result of a sudden road closure which leads to many consumers in these regions purchasing foods which can be stored for a prolonged period to a higher degree than consumers living in urban centres. Consumers in urban centres appreciate the convenience of processed fruit and vegetable products which can be prepared and consumed quickly either as a quick lunch or dinner meal or as a quick snack during their busy day-to-day activities. Some of the more popular frozen fruit and vegetable products in Switzerland include frozen mixed vegetables (peas, carrots, corn); processed (often canned) fruit incorporated in cakes; and canned fruit and vegetable products.

## **Purchase criteria**

Consumers are increasingly conscious of the health properties of their food consumption and in turn, have increasingly sought out labels that clearly define the categorisation of processed fruit and vegetable products. The role of “Swissness” also is important for many consumers with consumers trusting the quality and security of domestically produced processed fruit and vegetable products. Consumers have grown concerned about the perceived low nutritional value of processed fruit and vegetable products which has led producers to pivot to the use of more natural ingredients and also the use of sustainable production practises which helps to alleviate these concerns.

## **Recent market trends**

The outbreak of Covid-19 helped drive sales of processed fruit and vegetables in Switzerland as consumers rushed to purchase products that can be stored for a prolonged period of time. Frozen processed fruit and vegetables in particular benefited from this trend and were the fastest-growing processed fruit and vegetable product in 2021. It is however expected that Swiss consumers will switch back to purchasing more fresh fruit and vegetable products as the economy re-opens and the need to store processed fruit and vegetables begins to subside. Shelf-stable fruit and vegetables continue to suffer from an image of being unhealthy in Switzerland which explains why their total retail value is far behind that of frozen processed fruit and vegetable products. Brands in Switzerland have begun to increasingly emphasis the natural ingredients found in processed fruit and vegetable products in a bid to entice Swiss consumers to purchase their products. However, at least so far, consumers appear to prefer to spend a little bit extra in purchasing fresh fruit and vegetables.

### **5.11.3 Offer**

#### **Domestic production**

The Swiss processed fruit and vegetable market is largely dominated by the larger retailers in the country such as Migros which has just under a 50% brand share of the processed fruit and vegetable market and COOP which has just over a 20% share of the market. These two retailers offer their own processed fruit and vegetable products under private labels. Outside of the big two retailers of Switzerland, Findus and Hero are the next two biggest companies in the market with a share of 7.1% and 6.6% respectively. The larger processed fruit and vegetable products sold in the market of Swiss origin include frozen strawberries, frozen spinach and frozen raspberries.

#### **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 4.2.4, EU-processed fruit and vegetable products with GI protection are further granted full protection in Switzerland.

## Main competitors

The main competitors come from limited competition from domestic producers, especially for frozen fries and certain frozen berries. The UK and USA are also larger foreign competitors in the Swiss processed fruit and vegetable market.

### 5.11.4 Specific market entry requirements

#### Market Access and Entry; Standards, SPS measures; labelling

Importer and exporters of many fruit and vegetable products including some which may effectively fall in the scope of products covered in this product snapshot need to be registered with the intra-European TRACES database. A phytosanitary certificate and a plant passport may be required, as may be a permit to market plants by the importer.

**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 – citrus fruit category (0811) from Spain to Switzerland***

[Results | Access2Markets \(europa.eu\)](#)

#### Standards, SPS measures; labelling

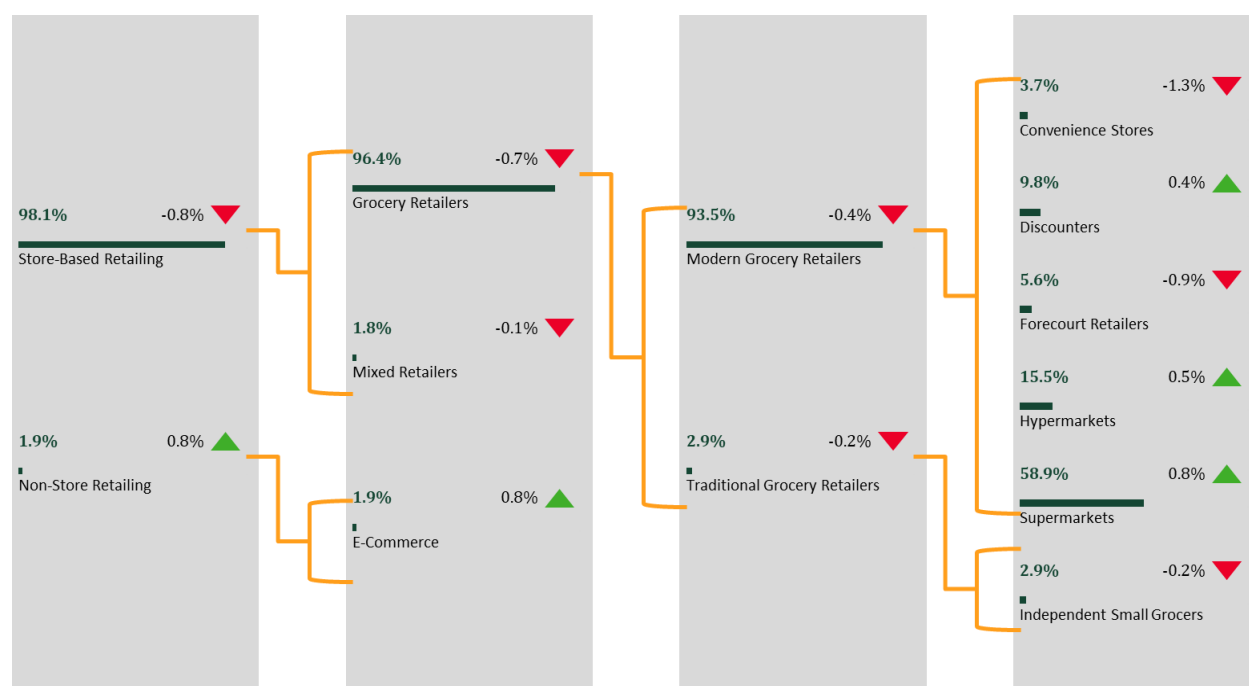
As noted in section 4.2.1, there are no SPS checks between Switzerland and the EU, as such, fruit and vegetable products can be exported or can be transited through Switzerland without any border checks. The EU and Switzerland have mutual recognition of organic products within both markets.

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 5-48, modern grocery retailers account for the majority of sales of processed fruit and vegetable products in Switzerland with a share of 93.5%. Within modern grocery retail outlets, the distributor with the largest percentage of sales are supermarkets which have a share of 58.9% of sales. Hypermarket stores have a share of 15.5% followed by discounters with a share of 9.8%. Traditional grocery retailers have a total share of 2.9% of sales while the e-commerce channel accounted for 1.9% of sales.

**Figure 5-48: Distribution channel overview of processed fruit and vegetables in Switzerland (2021); retail value**



Source: Euromonitor International: Packaged Food, 2021.

### 5.11.6 Challenges for EU products

The main challenge for EU products comes from the expected decline in total sales of processed fruit and vegetable products in Switzerland as the economy has reopened post-COVID-19 which has led to a decline in demand for foods which can be stored for a prolonged period. The image of shelf-stable fruit and vegetables as an unhealthy product is strong in Switzerland which makes it additionally difficult to market these products to the Swiss consumer base. Swiss consumers further expect to be able to see and weigh in on the nutritional ingredients found in processed fruit and vegetable products, showing an increasing preference for processed fruit and vegetables with natural organic ingredients.

### **Market Takeaway: Processed fruit and vegetables**

**Consumption:** Frozen processed fruit and vegetables are overwhelmingly preferred in the Swiss market as shelf-stable processed fruit and vegetables continue to suffer from an image of being comparatively unhealthy.

**Competition:** Largely comes from the domestic market with domestic retailers' private labels making up most of the market share.

**Distribution:** Mainly sold through modern retail channels with traditional grocery retailers' sales being minimal in comparison.

**Challenges:** The reduction in total demand for products which can be stored for a prolonged period coupled with the negative image placed on shelf-stable fruit and vegetable products as being unhealthy.

**Opportunities:** Demand for processed fruit and vegetable products which are produced using natural (i.e. less artificial) ingredients is growing in Switzerland and is a key opportunity area in the processed fruit and vegetable market.

## 5.12 Pet food

### 5.12.1 SWOT analysis

STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> <li>▪ The market has grown historically and is forecast to continue to grow.</li> <li>▪ Switzerland is a net importer of pet food and imports have been increasing in recent years.</li> <li>▪ The EU accounts for the majority of imports (85%).</li> </ul>	<ul style="list-style-type: none"> <li>▪ Exports have been increasing in recent years.</li> <li>▪ The markets for fish food, bird food and small mammal/reptile foods are rather small.</li> <li>▪ The fish and bird population are Switzerland is forecast to decline.</li> </ul>
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> <li>▪ Cat and dog food are the two biggest markets and are forecast to grow at the highest rates.</li> <li>▪ E-commerce is growing at a strong rate and already accounts for 14% of the retail value (a number that doubled in the past five years)</li> <li>▪ An ongoing premiumisation trend, demand for sustainable and healthy products, as well as specialised products.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Multinationals Nestlé (which is of Swiss origin) and Mars dominate the market.</li> <li>▪ Domestic producers are also numerous.</li> <li>▪ Other non-EU exporting countries such as China, the United Kingdom and Thailand.</li> </ul>

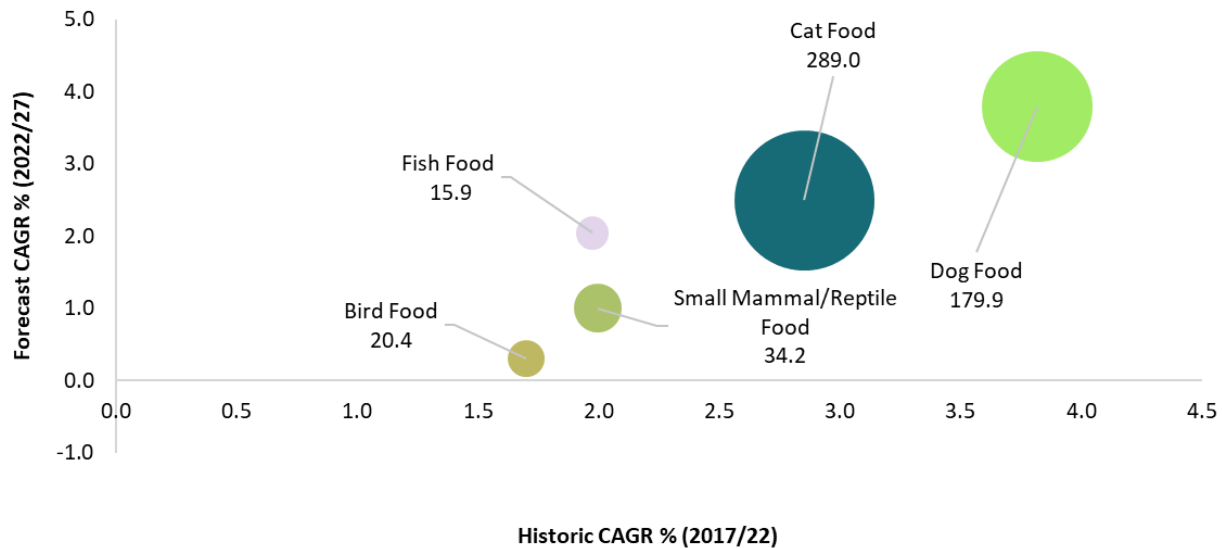
### 5.12.2 Consumption

#### Evolution of consumption

The total market size of the pet food market in Switzerland was around EUR 540 million in 2022. Figure 5-49 below illustrates that cat food had by far the biggest market size with around EUR 289 million and thus accounted for approximately half of the total pet food market value. Even though the market for dog food was smaller, it is still very important as well at EUR 180 million. The other three categories are nearly much smaller compared to the size of the cat and dog food market. Small mammal/reptile food had a market size of over EUR 34 million, followed by the bird food market with just over EUR 20 million and the fish food market with nearly 16 million.

Historically, between 2017 and 2022 all pet food markets grew. The dog food market grew the fastest at a CAGR of about 3.8%. This was followed by the cat food market with 2.9% and the small mammal/ reptile food, and the fish food market with 2.0%. The bird food market grew, albeit more slowly, at a CAGR of about 1.7%. Between 2022 and 2027 all pet food categories are forecast to grow at a slightly slower pace than before, however, dog food remains the category with the highest forecasted CAGR of around 3.8%, followed by cat food with about 2.5%. Fish food is forecast to grow at a CAGR of approximately 2.0%, followed by small mammal/reptile food with 1.0%, and bird food at the lowest CAGR of about 0.3%.

**Figure 5-49: Evolution and forecast of the market for pet food (EUR million) in Switzerland, 2017-2027**



Source: Euromonitor International: Pet Care, 2022.

### Consumer profile and purchase criteria

#### Consumers

Most Swiss pet-owners, including families with children, choose cats or dogs as a pet. Cats are the most popular pet in Switzerland, with over three in ten households owning one. Dogs rank second and are owned by over 12% of households. Swiss consumers prefer mainly small (up to 9 kg heavy) and large-sized dogs (over 23kg heavy), and fewer households own medium-sized dogs. Beyond these main two categories of pets, some Swiss households also own fish, small mammals, birds, and reptiles. During the COVID-19 pandemic, the number of households with cats and dogs increased. An increasing number of households also own small mammals and reptiles; however, fish and birds are becoming less popular pet choices. Small mammals and reptiles are viewed to be good “starter pets” for children as they require less care than cats and dogs.

Different types of consumers prioritize different aspects when it comes to feeding their pets; and often they will bear in mind the same considerations they use when purchasing food for themselves. Pet owners that humanize their pets (in particular cats and dogs) are likely to choose more premium food as they do for themselves. Health-conscious pet owners may also pay extra attention to what they feed their pets. Consumers who pay attention to the environment are more likely to choose their pet food according to its environmental footprint.

#### Drivers and method of consumption

The COVID-19 pandemic and related restrictions caused by it increased the interest of consumers in certain pets. In times of home seclusion and social distancing, consumers had more free time to fill and often felt alone which is why many decided to acquire a pet. The overall pet population

has already been growing pre-COVID-19 and is expected to continue to grow (with the exception of fish and birds).

Due to the COVI-19 pandemic, consumers pay more attention to what they feed their animals which has boosted demand for premium products as well as healthy products with added value. As pets are more and more commonly viewed to be part of the family, this further drives demand premium products as well as healthy and environmentally friendly products including organic food. The demand for treats and mixers is driven by the humanization trend as well because consumers want to treat their pets.

The ability to purchase pet food conveniently through e-commerce channels and subscription models further drives demand, in particular for specialised items that otherwise cannot be found necessarily in stores.

When it comes to dog food, dry dog food is more demanded because of its dental benefits and because it is easier to store and portion. Wet food is more popular with cat owners as cats are perceived to need more hydration. Moreover, it can stop and manage health problems such as urinary tract issues.

### **Purchase criteria**

As is often the case, one of the main purchase criteria is the price. When it comes to dog food, most consumers purchase mid-priced items, however, some also go for economy or premium items depending on their means and preferences. Most cat owners purchase cate food from the economy or mid-price range segments. Nevertheless, some consumers also choose premium food. When it comes to other pet food, such as for reptiles and birds, the price plays an even larger role as it is the most important criterion for many consumers.

The type of food is an important criterion as well. Prepared dog food is more popular than non-prepared dog food. Dry dog food has remained more popular than wet dog food, partly because of the dental benefits that it offers. In addition, it is also easier to portion and store. However, when it comes to cat food the situation is reversed. Treats and mixers are the third most popular choice in both, dog and cat food.

Many consumers also pay attention to purchasing functional and age-appropriate pet food. Adults, seniors and youngsters have different dietary needs that are best fulfilled by different kinds of food. This is the case mainly for dogs, cats and fish. A consumer with an old pet thus is more likely to choose pet food that supports certain medical needs of their pet. Pet owners look to improve their animal's quality of life and life expectancy.

For sustainable and health-conscious consumers, ingredients and where these are sourced are important as well. They are likely to choose all-natural and organic products, as well as sustainably produced products and products containing for example CBD.

### **Recent market trends**

In the last years the following trends have been in particular shaping the pet food market:

- **The humanization trend:** In particular when it comes to dogs and cats this trend is ongoing and very important as it has effects on all areas of the pet food market and its development. An increasing number of consumers view their pets to be an integral part of the family and thus much more than “just” a pet. This trend explains the development of some other trends mentioned below as consumers projects their own dietary needs and values onto their pets and thus take pet food purchase decisions accordingly. For

example, this trend drives the development of new products such as restaurant-style dishes from premium brands for cats. However, this trend does not extend to other pets such as birds, fish, small mammals and reptiles so far.

- **Premiumisation and rising health awareness:** Premium products are high in demand. When it comes to dog food, in particular, premium dog treats and mixers are being released. The situation is similar concerning cat food, and even though treats and mixers are relatively new to the market, premium products are the fastest growing product category. In particular, BARF (biologically appropriate raw food) is a popular food for cats and dogs. BARF food is very expensive in per kilogram terms, which is why it is mainly targeted at smaller dogs and cats. Cat owners are more likely than dog owners to purchase packaged BARF products because cats seemingly have more multifaceted nutritional needs as they require certain minerals to remain healthy. As the number of health-conscious pet owners is increasing the popularity of value-added pet food is increasing as well. Since the COVID-19 pandemic, some pet owners have tried to purchase immunity-boosting products or other healthy and organic products for their pets. The demand for premium and healthy pet food products is also increasing when it comes to fish. However, this trend does not affect bird, small mammal and reptile food as much because these are not commonly seen to be part of the family but rather as pets.
- **Sustainability trend:** As previously mentioned, pet food owners are transmitting their values and needs to their pets. As sustainability is important to a large number of Swiss consumers, many of them also think it is important when purchasing pet food. As a result, sustainable pet food is trending. Examples include organic, locally sourced, plant or insect-based pet food. An increasing number of pet food manufacturers are hopping on to this trend and introducing new sustainable pet food options that also often offer eco-friendly packaging, short supply chains and other sustainable features. Delibest for example introduced dog food that only uses meat produced within Switzerland. Environmentally friendly consumers might also choose insect-based pet foods as the production of these is more environmentally friendly than most meat-based products.
- **Specialisation trend:** As consumers take their pets' nutrition increasingly seriously, a wide variety of pet food is needed to cater to the different demands of different pets and different breeds. This segmentation offers wide opportunities for manufacturers to introduce new innovative products on the market to cater for different pet groups and even niches. Some brands for example already developed dog food that is targeted at different needs such as urinary, hormonal or skin problems. A specific example is Hill's Science which introduced products specifically for smaller dogs. These products are adapted to the small jaws of certain dog breeds.
- **E-commerce and subscription models:** an increasing number of consumers are switching to e-commerce when it comes to ordering pet food. The e-commerce channel is convenient in particular when it comes to purchasing large amounts of pet food that otherwise would need to be carried. Consumers currently particularly value the subscription models as they offer even more convenience. First, pet food is delivered to their homes and second, they do not need to remember to order new pet food. Younger consumers in particular are into e-commerce.

### 5.12.3 Offer

#### Domestic production

The dog and cat food market are dominated by multinational companies. However, these companies have production facilities in Switzerland; and indeed one of them – Nestlé – is headquartered in the country. The competition between these two multinationals is forecast to increase.

Mars Schweiz AG is the clear leader in the dog food market with a market share of close to 29%. The most popular dog food brands of the company are Pedigree, Royal Canin, and Cesar. Nestlé Suisse SA, with its Matzinger, and Pro Plan brands ranks second with a market share of close to 10%. The retailer Migros with its Asco brand ranks very close to Nestlé Suisse SA.

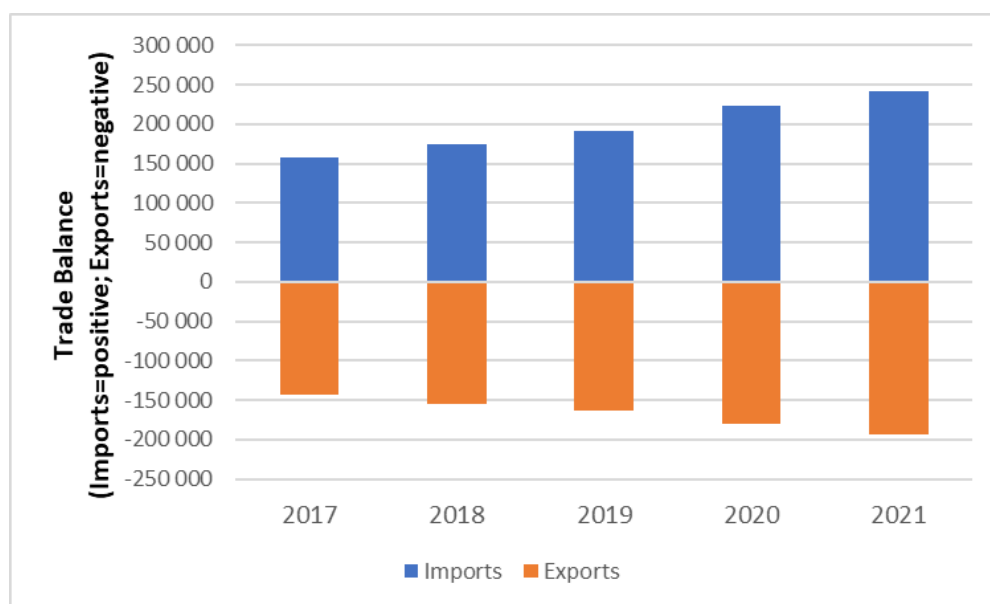
The cat food market on the other hand is dominated by Nestlé Suisse SA due to its Felix, Friskies, ONE, and Gourmet brands. The company has a market share of over 35%. Mars Schweiz ranks second partly due to its Whiskas brand. It has a market share of close to 24%. Migros also ranks third in cat food due to its private-label brands including Excelcat. The company has a market share of nearly 13%.

The domestic company Vitakraft Schweiz AG is the leader in bird food, small mammal and reptile food, whereas Tetra Werke GmbH leads the fish food sector.

#### Imports and exports

Figure 5-50 shows that Switzerland imports more pet food than it exports. In 2021 the country imported pet food with a value of EUR 241 million and exported about EUR 193 million. Since 2017, both imports and exports have been increasing year by year. Between 2017 and 2021 the value of imports increased by about EUR 83 million meaning they nearly increased by two-fifth.

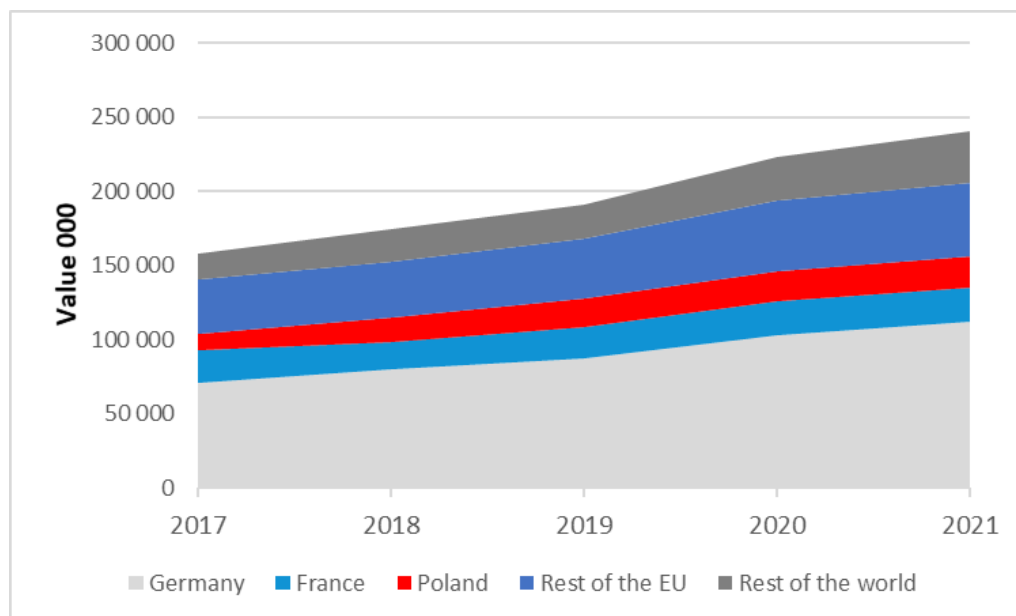
**Figure 5-50: Trade balance (imports and exports) of pet food (cat and dog) in Switzerland, 2017-21; value EUR 000**



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

Data for CN code 230910

Figure 5-51 clearly shows that Germany was the biggest exporter of cat and dog food to Switzerland in 2021. Germany exported products with a value of close to EUR 112 million. France ranked second with close to EUR 23 million, followed by Poland with nearly EUR 21 million. These three main exporters together accounted for almost 65% of all Swiss imports in 2021. In total, seven of the top ten exporters are from the EU. In addition to the first three, these are Austria, Netherlands, Italy and Hungary. In total, the EU accounted for about 85% of the market value in 2021. The main non-EU exporters were China, the United Kingdom and Thailand.

**Figure 5-51: Swiss imports of pet food (cat and dog) by country, 2017-21; value EUR 000**

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

Data for CN code 230910

### Main competitors

The domestic market for cat and dog food is dominated by two multinational companies Nestlé Suisse SA, and Mars Schweiz AG, which makes them the biggest competitors. There is also some notable private-label competition from Migros. The largest competitor in small mammals, reptiles and bird food is Vitakraft Schweiz AG. The biggest competitor in the fish food area is Tetra Werke GmbH. Besides these market leaders, there are numerous other competitors in the pet food market including many smaller domestic companies.

Other exporters of pet food to Switzerland are competitors as well, however, as the EU accounts for around 85% of all pet food imports to Switzerland, they are a smaller threat at the moment. The main non-EU exporters were China, the United Kingdom and Thailand.

## 5.12.4 Specific market entry requirements

### Market Access and Entry

In order to export pet foods to Switzerland a number of permits and documents need to be obtained. Firstly, the importer and exporter of the product must be registered with the intra-European TRACES system. There must be a general permit for grains, fodder and foodstuffs and a veterinary health certificate for animal products. Other requirements may apply, such as a notification of feed materials in certain cases. It is recommended to consult the link below.

There are tariff rate quotas for EU pet foods exported to Switzerland, with tariffs applying once the TRQ volumes are exceeded.

**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 Italy to Switzerland***

<https://trade.ec.europa.eu/access-to-markets/en/results?product=230910&origin=IT&destination=CH>

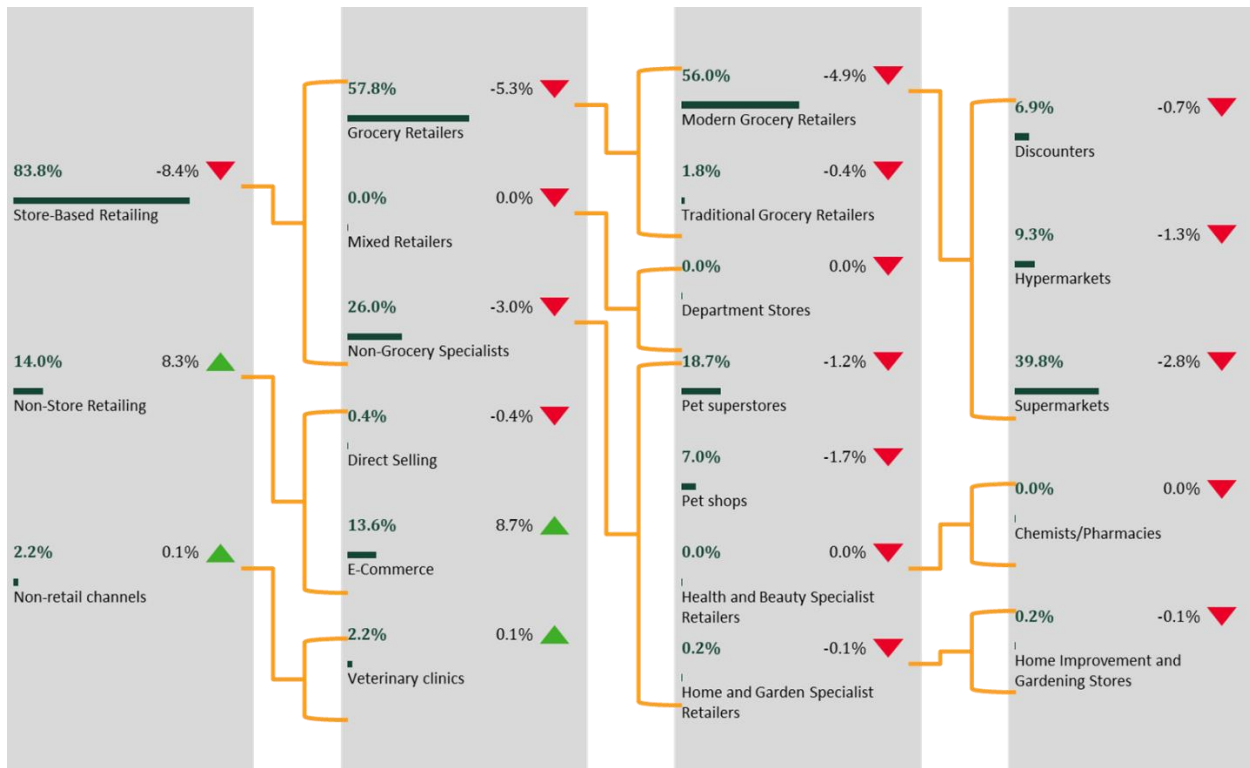
### **Standards, SPS measures, labelling**

As the EU and Switzerland share a common SPS area, there are not checks at the border for pet food products arriving from the EU to Switzerland.

### **5.12.5 Distribution**

Figure 5-52 below shows that store-based retailing is the largest distribution channel for pet food products with 83.8% of pet foods being distributed via this channel. During the last years, e-commerce retailing has been gaining a lot of popularity and in 2021 accounted for 13.6% of the retail value, while veterinary clinics accounted for 2.2%. Modern grocery retailers (56.0%) in particular supermarkets remain the most important grocery retailers with 39.8%. Another important channel in 2021 was pet superstores, which accounted for 18.7% of the total retail value.

Figure 5-52: Distribution of pet food in Switzerland (2021); retail value



Source: Euromonitor International: Pet Care, 2022.

### 5.12.6 Challenges for EU products

EU producers are facing different challenges when entering the pet food market in Switzerland. First of all, the competition is big. While Switzerland does have a trade deficit in pet food, domestic production is nonetheless important. Furthermore, other exporting countries, in particular, China, the United Kingdom and Thailand, are competitors. International brands including Mars and Nestlé, which both produce domestically, lead the market. It also is important to keep up with current trends in the pet food market in Switzerland as these evolve and might offer new opportunities or close old ones.

### **Market Takeaway: Pet food**

**Consumption:** The Swiss pet food market had a size of about EUR 539 million in 2022 and is forecast to continue to grow at good rates until 2027, albeit more slowly than in previous years.

**Competition:** Domestic production and other non-EU exporting countries such as China, the United Kingdom, and Thailand. Multinationals dominate but local companies are important as well.

**Distribution:** The main channels are modern grocery retailers such as supermarkets as well as non-grocery specialists including pet shops. The popularity of e-commerce retailing has been increasing as well and thus it has become more important.

**Challenges:** Strong competition; to compete with multinationals as well as local companies. Keeping up with evolving trends and demands.

**Opportunities:** Cat and dog food markets are the largest and forecast to grow at the highest pace, e-commerce is growing rapidly, and high-quality premium products that are deemed to be healthy and environmentally friendly, specialised products tailor-made for specific needs.

## 5.13 Biscuits / cereal bars

### 5.13.1 SWOT analysis

STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> <li>▪ The biscuits and cereal bar market is forecast to continue to grow.</li> <li>▪ Switzerland is a net importer of biscuits and cereal bars.</li> <li>▪ The EU accounts for approximately 90% of imported products to Switzerland.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Forecasted growth rates are lower than in previous years.</li> <li>▪ The largest category (filled biscuits) is forecasted to have the lowest growth rate, which even is negative.</li> <li>▪ Sugar-dense, high calory products are less in demand due to the health trend. The same is true of cheap products with low-quality ingredients because of the premiumisation trend.</li> </ul>
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> <li>▪ Snack bars and wafers are forecast to have the highest growth rates. Filled biscuits are the largest category.</li> <li>▪ Demand for healthier options and more transparency concerning ingredients.</li> <li>▪ High-quality premium products due to the importance of self-indulgence.</li> <li>▪ Products catering for consumers with food intolerances and allergies such as dairy-free products, nut-free products and gluten-free products.</li> </ul>	<ul style="list-style-type: none"> <li>▪ The Swiss market is dominated by domestic companies such as Migros (private label), Kambly SA, and Wernli AG.</li> <li>▪ Products from international companies such as Mars and Mondelez can be found all over Switzerland as well.</li> <li>▪ The main non-EU exporters of biscuit and cereal bars to Switzerland are the United Kingdom and Serbia, however, they are the smallest threat considering the import market is dominated by EU products.</li> </ul>

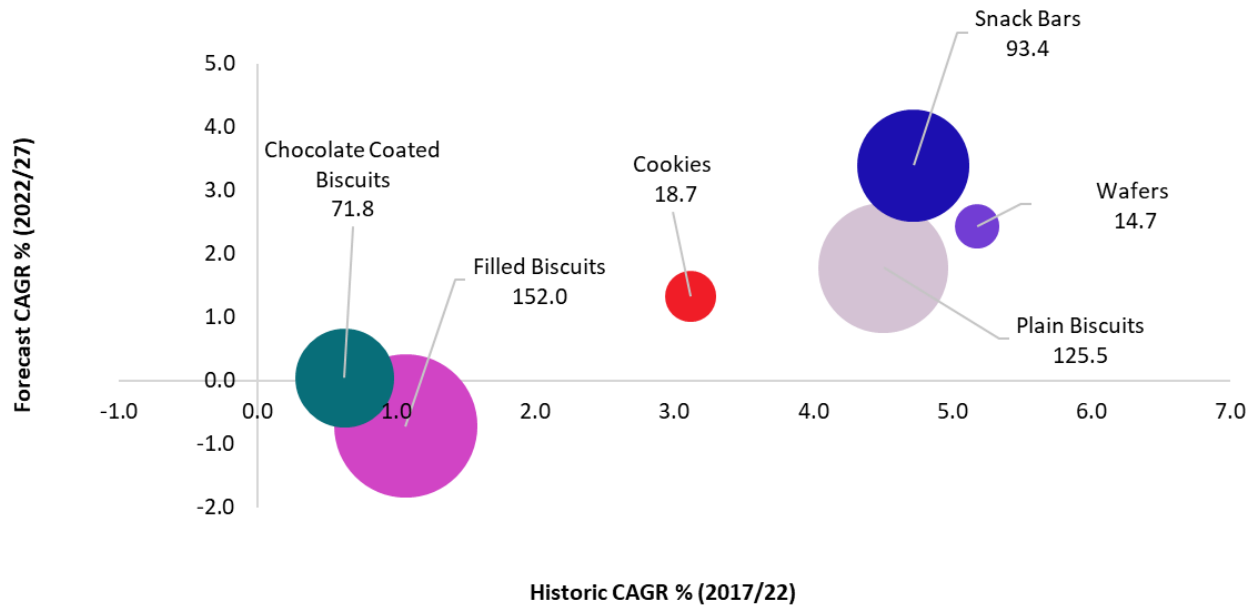
### 5.13.2 Consumption

#### Evolution of consumption

The market for biscuits and cereal bars had a total value of EUR 476 million in 2022. As shown below filled biscuits are the largest biscuit and cereal bar product category in Switzerland by value at around EUR 152 million. The second-largest biscuit and cereal bar product category are plain biscuits with a value of close to EUR 126 million followed by snack bars with a value of more than EUR 93 million, chocolate coated biscuits with a value of nearly EUR 72 million, and cookies with a value of close to EUR 19 million. Wafers are the smallest category with a value of close to EUR 15 million.

Historically, between 2017 and 2022 the market for biscuits and cereal bars has been growing at a higher rate than it is forecast to grow in the coming years up to 2027. Nonetheless, overall, the market is forecast to continue growing. The largest category-filled biscuits are forecast to have the lowest CAGR as it is expected to decline at a CAGR of -0.7% between 2022 and 2027. Snack bars are forecast to have the highest CAGR of 3.4% followed by wafers with 2.4%.

**Figure 5-53: Evolution and forecast of the market for biscuits and cereal bars in Switzerland (total value EUR m), 2017-2027**



Source: Euromonitor International: Packaged Food, 2022.

## Consumer profile and purchase criteria

### Consumers

Consumption of biscuits and cereal bars in Switzerland has been a common practice in the country for decades and as a result, some domestic biscuit varieties have emerged such as assortments from Kambly. Biscuits are fairly universally consumed. Companies offer a wide variety of products to attract different consumers such as children, vegans or people with intolerances. Snack bars have become more popular in recent years and are the fastest-growing category in this sector. In particular, health-conscious consumers enjoy snack bars because these are viewed to be generally healthier than biscuits. Consumers of biscuits and cereal bars tend to live busy lifestyles, which is why they enjoy fast and convenient snacks such as biscuits and cereal bars. Regarding age, 20-30 years old dominate the biscuit market. The 5-10 years age group usually particularly likes unhealthier options such as cream-filled and chocolate-coated biscuits.

### Drivers and method of consumption

People living busy lifestyles in particular drive demand for biscuits and cereal bars because they consume them as a bridge between two meals, or consume them as a substitute for breakfast, as a supplement to their daily diet, or as an energy boost. An increasing number of people reach out for these products either on the go, in school, on the train, at the office or while working from home.

The COVID-19 pandemic further influenced already existing trends in the consumption of biscuits and cereal bars in Switzerland. Even though Swiss consumers were health conscious before the pandemic, the pandemic increased consumer demand for healthy snack options. This drives demand for snack bars such as cereal bars and protein or energy bars but rather decreases

demand for unhealthier sugar-dense biscuit options such as chocolate-coated biscuits and filled biscuits. Plain biscuits and wafers on the other hand are perceived to be slightly healthier, which is why demand is likely to increase further. Overall, the sector is forecast to continue to grow.

The COVID-19 pandemic also increased the demand for wellness and relaxation, which is why indulgence is key for some consumers. These consumers pay less attention to the health factor of a product but rather want to enjoy eating biscuits and cereal bars. This drives demand for high-quality premium biscuits and cereal bars.

### Purchase criteria

The quality of the products they buy is important for Swiss consumers, which means many of them would pay higher prices for high-quality premium biscuits and cereal bars. The taste profile is important for consumers who look for indulgence products as they want to purchase the item that they can enjoy the most. Overall, Swiss consumers mainly purchase plain biscuits, followed by filled biscuits, chocolate-coated biscuits, and then cereal bars. In particular health-conscious consumers choose cereal bars over biscuits as they are viewed to be the healthier choice. However, health also plays a role for consumers who aim to purchase biscuits, which means they might prefer varieties that are sugar reduced and/ or include healthier ingredients such as whole wheat. Some consumers prefer to purchase branded products but this is not important to everyone and thus some also choose private-label biscuits and cereal bars. The innovation of a product might also be a purchase criterion for some as consumers like to try new flavour profiles or purchase new pack sizes.

### Recent market trends

The following market trends are currently visible:

- **Health trend:** The health trend is very strong right now, as an increasing number of consumers pay attention to what they eat. This offers opportunities for companies to release biscuits with a lower fat content, lower fat content and smaller packaging sizes which are perceived as healthier snack options by many consumers. Wernli for example introduced mini chocolate coated biscuits that contain 30% less sugar and are targeted towards children. Moreover, the Hug brand introduced its crispyPUR biscuits which contain natural fruits and spelt flour.
  - **Nutri-Score labelling:** Since 2020, some Swiss brands such as Nestlé and Danone, but also private label products from Aldi, Migros and Coop use Nutri-Score labels. It is expected to become more popular in the coming years as it helps health-conscious consumers to take more informed choices. Transparency is highly important to Swiss consumers, which makes it lucrative for companies to aim to be more transparent about ingredients as well as their sustainability.
- **Premiumisation trend:** Self-indulgence is important to Swiss consumers, which is why many of them opt for premium high-quality products. Branded biscuits and cereal bars have a better reputation, which is why the share of private-label products is currently on the lower side. The market share of private label products is forecast to decline; however, it will remain an important category at the cheaper end of the market. This development is likely to accelerate once the impact of COVID-19 on price sensitivity lowers. Private label producers are likely to introduce more premium offerings, such as Coop's Fine Food private label line in order to address the premiumisation trend.
- **Food intolerances and allergies:** Manufacturers of biscuits and cereal bars are addressing the growing demand for products suited for consumers with specific food intolerances or allergies. These include for example dairy-free products, nut-free products

and gluten-free products. This is a niche trend, but important as around one in five consumers in Switzerland have some form of food allergy or food intolerance.

### 5.13.3 Offer

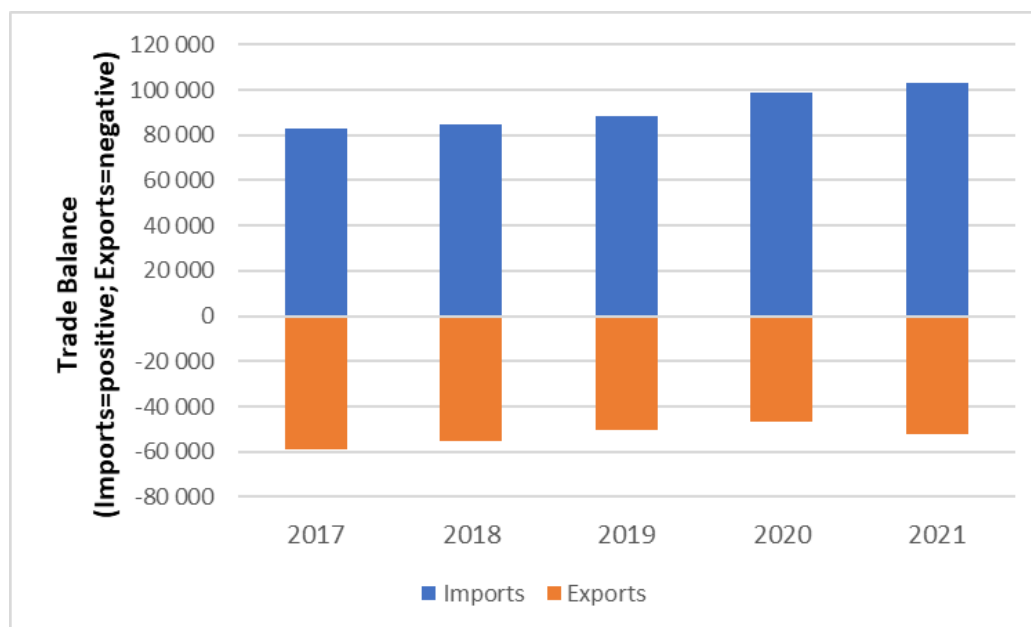
#### Domestic production

The Swiss biscuit and cereal bar market is fragmented; however, one company stands out: Migros Genossenschaftsbund eG (operator of the Migros supermarket chain), which is the market leader with a market share of 36%. The company's main biscuit and cereal bar brands are all private label brands such as Farmer, Sun Queen, and Choc Midor. Kambly SA ranks second with a market share of approximately 11%. Its most popular brand is called Kambly just like the company itself. Wernli AG follows with a market share of around 9%. The company is most known for its Petit Beurre, and Chocoly brands. The companies dominating the biscuit and cereal bar market are domestic Swiss companies. Products from international companies such as Mars and Mondelez can be found all over Switzerland as well. Domestic production of premium biscuit and cereal bar products and such of a healthier variety or specifically targeted for consumers with food intolerances or allergies has grown in line with rising demand.

#### Imports and exports

Figure 5-54 below shows that Switzerland is a net importer of biscuit and cereal bar products with the country importing to a value of EUR 103 million in 2021 compared to exports of EUR 52 million. Imports during the past five years have grown year on year, whereas exports declined overall. Between 2017 and 2021 imports grew by EUR 20 million.

**Figure 5-54: Trade balance (imports and exports) of biscuit and cereal bars in Switzerland, 2017-21; value EUR 000**

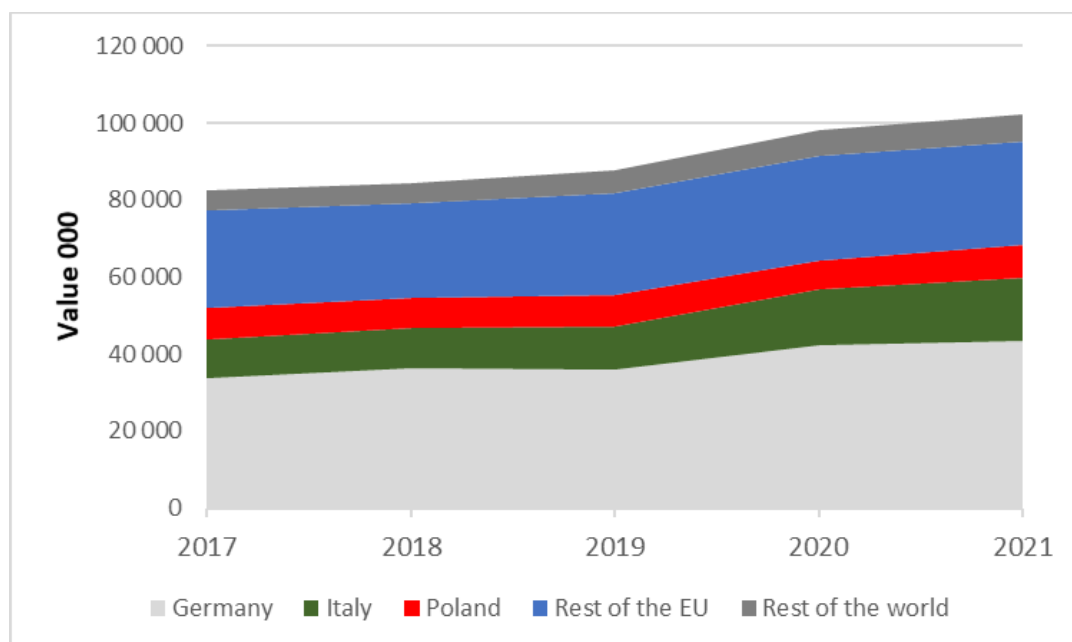


Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN codes 190531 and 190532

Figure 5-55 shows that Germany is the largest exporter of biscuit and cereal bar products to Switzerland with a total trade value in 2021 of EUR 43 million. This is followed by Italy and Poland. Other larger exporters from the EU include Netherlands, France and Belgium. Overall, the EU is highly present in the trade of biscuit and cereal bar products to Switzerland, accounting for over 90% of total imports of the product into Switzerland. The main non-EU exporters of biscuit and cereal bars to Switzerland are the United Kingdom and Serbia.

**Figure 5-55: Swiss imports of biscuit and cereal bars by country, 2017-2021; value EUR 000**



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

Data for CN codes 190531 and 190532.

## EU GI products

As noted in section 4.2.4, EU biscuit products with GI protection are further granted full protection in Switzerland.

## Main competitors

The Swiss biscuit and cereal bar market is dominated by mainly domestic companies. The clear market leader, who nearly has a two-fifth market share is Migros Genossenschaftsbund eG. Other important biscuit and cereal bar companies are Kambly SA and Wernli AG. International companies such as Mars and Mondelez are present in the Swiss market for biscuits and cereal bars as well.

Even though domestic production is important, Switzerland remains a net importer of biscuits and cereal bars. As the EU accounts for more than 90% of total imports, competition is limited in that area. Nevertheless, the two main non-EU exporters of biscuits and cereal bars to Switzerland are the United Kingdom and Serbia.

### 5.13.4 Specific market entry requirements

#### Market Access and Entry

For biscuit and cereal bars which do not meet Swiss technical standards, marketing authorisation for foodstuffs under the Cassie De Dijon principal is required. Biscuit and cereal bars containing coffee, sugar or edible oils will need to further obtain a general permit for the importation of grains, fodder and foodstuffs.

**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 baked goods category from Italy to Switzerland***

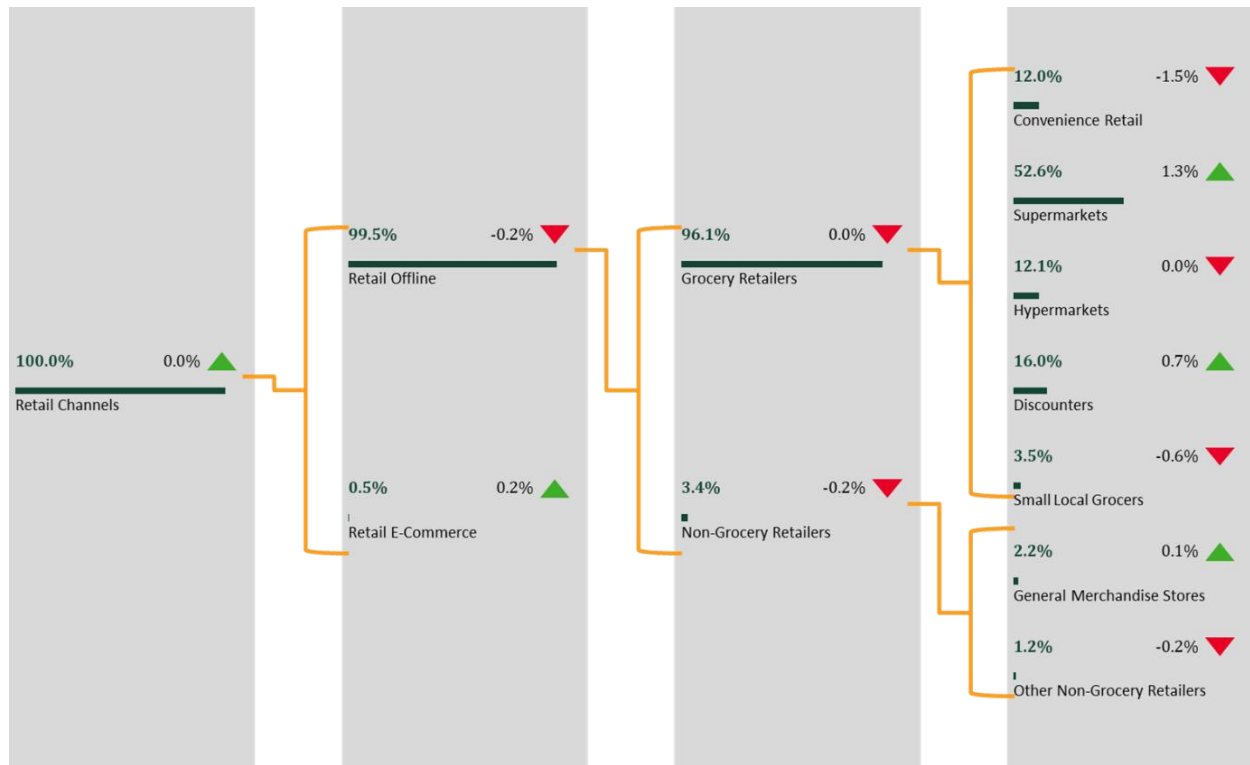
[Results | Access2Markets \(europa.eu\)](#)

#### Standards, SPS measures, labelling

Biscuit and cereal bar products must conform to the labelling requirements for packaged foods set out in section 4.2.3

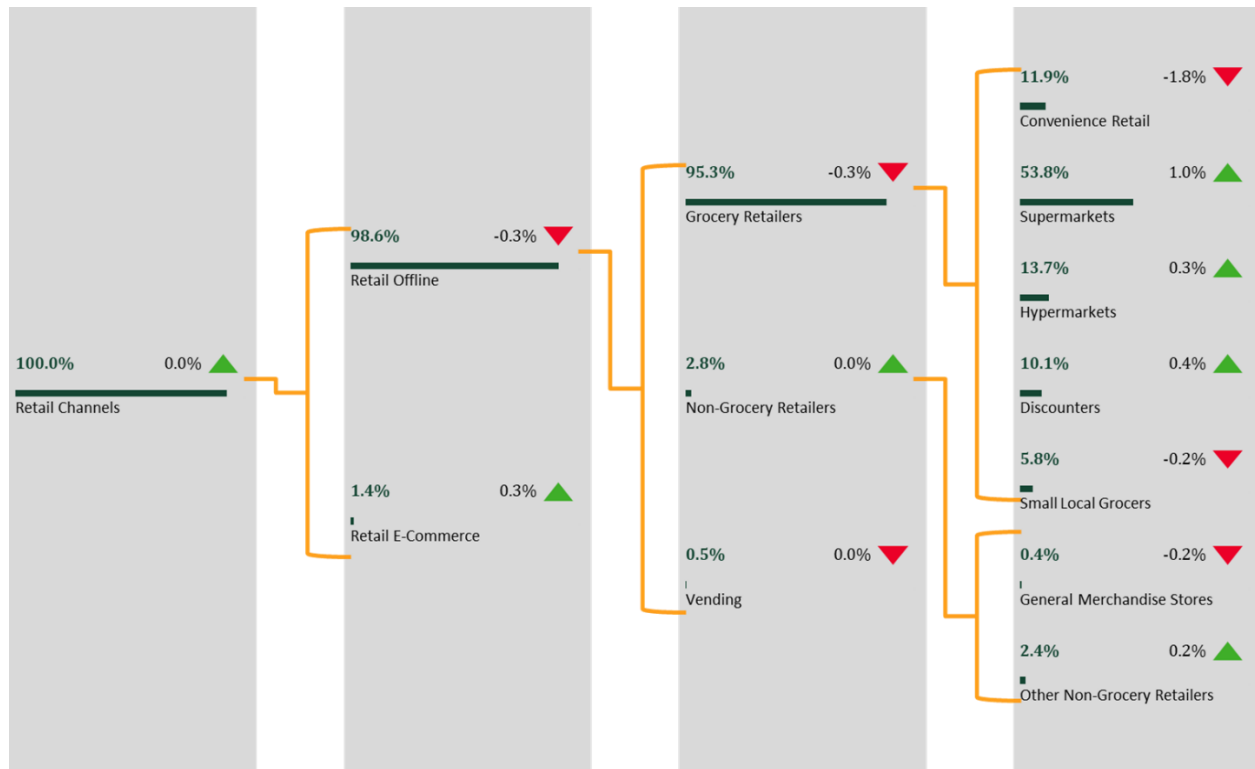
### 5.13.5 Distribution

Sweet biscuits distribution is focused mainly on grocery retailers which account for 96.1% of sales. The most important sub-channel within the grocery retailers category are supermarkets which account for 52.6% of all sales, followed by discounters with 16.0%, and hypermarkets with 12.1%. Non-grocery retailers accounted for 3.4% of sales. Sales via e-commerce are growing but still very low (Figure 5-56).

**Figure 5-56: Distribution channels of sweet biscuits in Switzerland (2021); retail value**

Source: Euromonitor International: Packaged Food, 2022.

Grocery retailers are the largest distributor of snack bars in Switzerland with a share of 95.3% of sales, with supermarkets accounting for 53.8% of sales followed by hypermarkets with 13.7% and convenience retail with 11.9%. Non-grocery retailers accounted for 2.8% of sales. E-commerce is growing, but still only accounts for 1.4% of sales (Figure 5-57).

**Figure 5-57: Distribution channels of snack bars in Switzerland (2021); retail value**

Source: Euromonitor International: Packaged Food, 2022.

### 5.13.6 Challenges for EU products

Competing with domestic Swiss production is the largest challenge for EU products. This includes production both by domestic Swiss operators and by multinationals. As Swiss consumers enjoy quality products it is important to offer such products to them. Moreover, it is a challenge for companies to be more transparent about where and what ingredients they source and how this affects the environment. A general challenge is related to the increasing health-consciousness of Swiss consumers as this makes it more complicated for more “traditional” sugar-dense products to be successful on the market. Despite these challenges, it is important to note that biscuit and cereal bar imports from the EU make up the majority of imports and the three largest exporters of biscuits and cereal bars are all EU Member States.

### **Market Takeaway: Biscuit and cereal bars**

**Consumption:** The market for biscuits and cereal bars had a total value of EUR 476 million in 2022. The market is forecast to continue to grow, although at a lower rate than in previous years.

**Competition:** Domestic products are the biggest competitor for EU products. The United Kingdom and Serbia are the biggest competitors from outside the EU however remain behind EU exporters such as Germany, Italy, and Poland.

**Distribution:** Sweet biscuits and cereal bars are largely distributed through grocery retailers, mainly supermarkets but also hypermarkets, convenience stores, and discounters. The popularity of e-commerce is growing however it is barely used as a channel at the moment.

**Challenges:** Competing with domestic production which is in touch with the local market and increasingly caters for new demands such as healthy, products, or products catering to consumers with certain food intolerances. Competing with international companies. Offering a high level of transparency.

**Opportunities:** Snack bars and wafers forecasted with the highest growth rates. Filled biscuit's largest category. Premium products, healthy (e.g. sugar reduced) products, and products for consumers with certain intolerances.

## 5.14 Baked goods

### 5.14.1 SWOT analysis

STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> <li>▪ The baked goods market has been growing in recent years and is forecast to continue to grow.</li> <li>▪ Switzerland is by far a net importer of baked goods.</li> <li>▪ EU exports account for close to 94% of total baked goods exports to Switzerland.</li> </ul>	<ul style="list-style-type: none"> <li>▪ The health consciousness of consumers decreases the consumption of baked goods that are high in sugar such as cakes and pastries.</li> <li>▪ Consumers demand transparency regarding the healthiness and sustainability of ingredients, as well as their origin.</li> <li>▪ Diverse and plentiful competition.</li> </ul>
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> <li>▪ Products with healthy ingredients to cater to the health and wellness trend.</li> <li>▪ Organic products and products with sustainable ingredients.</li> <li>▪ Bread is by far the largest category and is forecast to grow at the highest rate.</li> </ul>	<ul style="list-style-type: none"> <li>▪ The market is dominated by Swiss companies such as Migros Genossenschaftsbund eG, Coop Genossenschaft, and Aryzta Food Solutions Schweiz AG.</li> <li>▪ The many local artisanal bakeries produce high-quality and fresh products.</li> </ul>

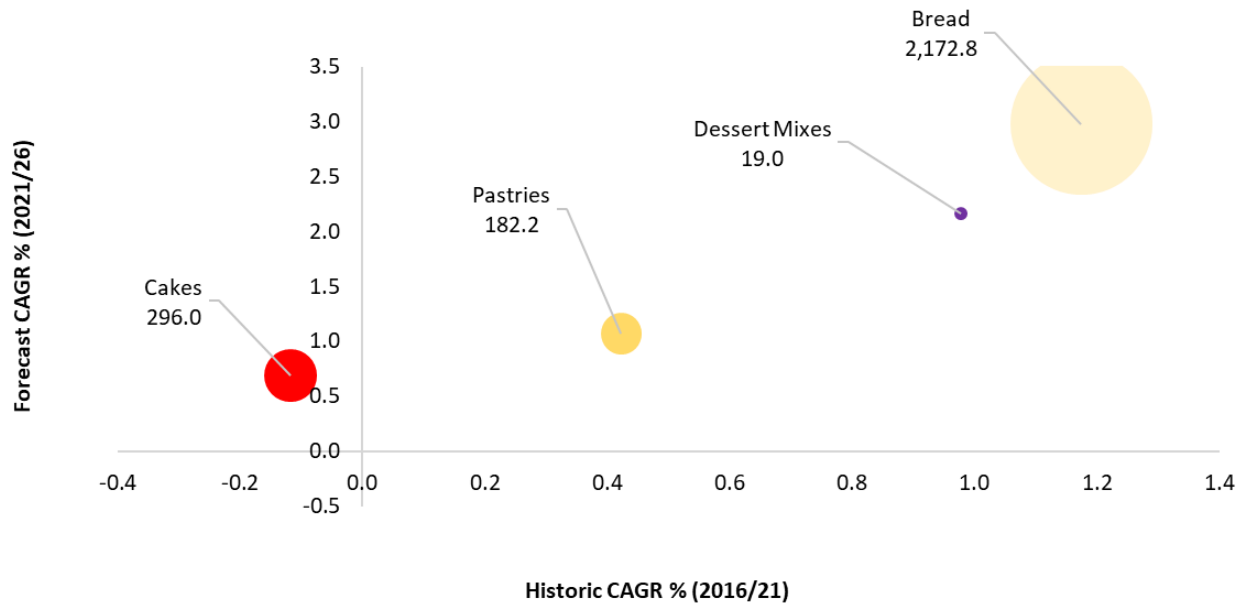
### 5.14.2 Consumption

#### Evolution of consumption

Figure 5-58 depicts the evolution of the consumption of baked goods in Switzerland. In 2021, the total market was worth around EUR 2.67 billion. Bread was the most popular category with a market value of EUR 2.17 billion. Cakes ranked second with around EUR 296 million, followed by pastries with over EUR 182 million. The market for dessert mixes had by far the smallest market size compared to the other categories at about EUR 19 million.

Historically, between 2016 and 2021 the market grew at a slow rate. The largest market segment, that of bread grew with the strongest CAGR of about 1.2%. The second biggest category, cakes, on the other hand, showed the lowest growth rate at a negative CAGR of -0.1%. The baked goods market is forecast to grow at a faster pace going forwards. All categories are forecast to have higher growth rates than historically. Bread has the highest forecast growth rate at 3.0% per year between 2021 and 2026. The dessert mixes category is forecast to grow at a CAGR of 2.2%, pastries at a CAGR of 1.1%, and cakes at 0.7%.

**Figure 5-58: Evolution and forecast of the baked goods market in Switzerland, 2016-2026; total retail value EUR m**



Source: Euromonitor International: Packaged Food, 2021.

## Consumer profile and purchase criteria

### 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. However, not all consumers purchase each type of baked good; for example, some Swiss consumers might not consume bread whereas others do not consume pastries. Health-conscious consumers are likely to not consume as great quantities of baked goods. However, they might buy products that are low in sugar or include ingredients that are perceived to be healthy such as grains. Sustainable consumers are likely to purchase products that are made locally with good ingredients. The majority of consumers are likely to just enjoy the consumption of baked goods such as families with children. Children in particular are less likely to think about the health or environmental benefits of baked goods and just choose what they enjoy the most. This is true for some adults as well.

### Drivers and method of consumption

The market for baked goods has been growing and is likely to continue to grow due to different drivers.

One driver for the increase in demand for particularly healthy and sustainable baked goods. This driver has been in place for a while but has accelerated in recent years. Health-conscious consumers drive demand for products that have reduced sugar and fat content, and the demand for products with ingredients that are perceived to be healthy such as grains or nuts.

The demand for local products has been increasing because Swiss consumers view these to be of higher quality and more sustainable. Thus, many Swiss consumers purchase baked goods at local artisanal bakeries.

Due to the COVID-19 pandemic, it is common for Swiss employees to work from home permanently for a few days per week, which drives demand for certain products that are consumed at home. Products that offer convenience and are suited for people leading busy lifestyles are increasingly in demand.<sup>50</sup>

Bread is a staple in Switzerland and is consumed throughout the day. It is usually eaten with different spreads and toppings either savoury or sweet, such as cold cuts, cheese or jam. Switzerland has a bread style for every occasion and even a special one called *Zopf* for Sundays.<sup>51</sup>

Sweet baked goods such as cakes, or pastries are consumed as snacks or desserts at home or on the go. Switzerland is known for its sweet baked goods such as *Magenbrot*, *Vermicelles*, and *Biberli*.<sup>52</sup>

### **Purchase criteria**

Value is an important purchase criterion for Swiss consumers. Many consumers aim to get the best quality for the lowest price. Thus, the quality of baked goods is highly important to most Swiss consumers, with most consumers willing to pay higher price points for high-quality products though some consumers focus on the price part of the equation as well.

The flavour plays another role, though consumers have varying preferences when it comes to taste. Bread is the most purchased baked good in Switzerland, followed by cakes, pastries and then dessert mixes. Consumers' most popular pasty choice for example is croissants. These are followed by pain au chocolat, viennoiserie and brioche. These choices show that Swiss consumers generally enjoy French-style sweet baked goods.

The origin of products is a criterion. Consumers tend to prefer local products over imported ones because they see them to be more sustainable and of high-quality. Artisanal baked goods production is highly popular in Switzerland.

For some consumers, the packaging plays a role as well. In particular sustainable consumers prefer to purchase products that are not packaged or have sustainable packaging. Unpackaged bread is the clear favourite of Swiss consumers. Only some purchase packaged bread.

Health conscious-consumers choose products according to their ingredients. They prefer baked goods that are low in sugar, high in fibre, gluten-free and/ or organic.

Some consumers also pay attention to the innovativeness of a product as they want to taste new flavours, as well as new sizes and formats.<sup>53</sup>

### **Recent market trends**

The following market trends are currently visible:

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<sup>50</sup> Euromonitor International, Packaged Food (2021)

<sup>51</sup> Swiss passion for baking (2019), <https://www.swissbake.in/blog/experience-the-swiss-passion-for-baking>

<sup>52</sup> Swiss Sweets and Pastries, <https://www.gpsmycity.com/articles/188-swiss-sweets-and-pastries.html>

<sup>53</sup> Euromonitor International, Packaged food (2021)

- **Health and wellness trend:** Health and wellness becomes increasingly important amongst Swiss consumers. Consumers are conscious of the effects food can have on their health. The tendency goes towards consuming fewer baked goods products that are perceived as unhealthy such as cakes and pastries due to their sugar content, or bread because of its calories. This trend is opening up opportunities for products that are sugar-reduced, high in fibre, organic and or/free from other ingredients that are viewed to be unhealthy. This trend also offers opportunities more specifically for:
  - **Gluten-free products:** Gluten-free baked goods are trending because of their popularity with health-conscious consumers. The demand for these products has been increasing in 2021 and is likely to continue to increase. A few years ago gluten-free baked goods were only available in specialist stores, but today they are widely distributed through different channels such as modern grocery retailers. Private-label products are being introduced to the market too.
  - **Healthy bread:** The Swiss bread market is very mature however forecast to continue to grow. Bread is a staple food in Switzerland. In particular bread with added value is trending. High-quality products and those with interesting ingredients such as nuts and seeds offer opportunities. New healthy bread variants and artisanal products are a good way to differentiate from the competition.
  - **Pesticide-free cultivation:** Many private-label brands such as Migros aim to switch to pesticide-free cultivation of bread cereals in Switzerland. The Migros bakery for example uses 85 000 tonnes of identity-preserved (IP)-Suisse grain annually. The grain is grown without the use of fungicides, insecticides or stalk shorteners. By 2023 Migros wants to use grain that is completely pesticide free. Baked goods that are produced with pesticide-free grains are trending because consumers view these products to be much healthier and environmentally friendly.
- **Local products:** In particular since the COVID-19 pandemic the demand for locally produced baked goods has been increasing. Consumers are keen to continue to support local artisanal bakeries. Overall, the number of farmers' markets has been going up in Switzerland as well, which offers a new channel of distribution for high-quality products, in particular bread. Smaller artisanal players are gaining importance and becoming a bigger competition for larger companies in Switzerland.
- **Innovation:** Baked goods companies continue to innovate and introduce new products on the Swiss market. New baked goods with new flavours are introduced. Moreover, products come in new sizes and formats. What works well usually stays on the market.<sup>54</sup>

### 5.14.3 Offer

#### Domestic production

The Swiss agricultural production is diverse but cannot meet the overall demand. In 2020, the country produced around 540 000 tonnes of wheat, part of which is used for the production of baked goods.

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<sup>54</sup> Euromonitor International, Packaged food (2021)

The first bakeries opened in Swiss monasteries in the Middle Ages. With the continuous growth of cities and the increase in the overall population of the country the demand for bread and other bakery products increased. Today, there are around 3 300 private and industrial bakeries in Switzerland.<sup>55</sup>

Local bakeries can be found in every neighbourhood or village. Locally produced bakery goods, in particular bread, are a source of pride for the Swiss. Swiss bread is known for its high-quality ingredients and crispy crust. Bread is generally similar to German bread, whereas Swiss sweet baked goods are of a rather French viennoiserie style.<sup>56</sup> Switzerland offers a variety of more than 200 traditional bread styles as well as 22 additional 22 special canton bread varieties.

Domestic Swiss companies dominate the baked goods market. The clear market leader is retailer Migros Genossenschaftsbund eG, with its private label products. The sales of the company accounted for around 13% of the total market value. Retailer Coop Genossenschaft ranked second with close to 6%. Its most popular own brands are Naturaplan, and Qualité & Prix. Aryzta Food Solutions Schweiz AG with its Hiestand brand accounted for nearly 3% of the market value. Dr Schär AG/SpA ranked fourth with 1%.<sup>57</sup>

### Imports and exports

As shown in Figure 5-59 Switzerland is by far a net importer of baked goods. The country imported close to six times more than it exported in 2021. In 2021, Switzerland imported baked goods with a value of about EUR 400 million, whereas it exported about EUR 70 million. Between 2017 and 2021 the imports of baked goods grew by about one-fifth. Overall, exports increased slightly as well, however, this increase was less steady.

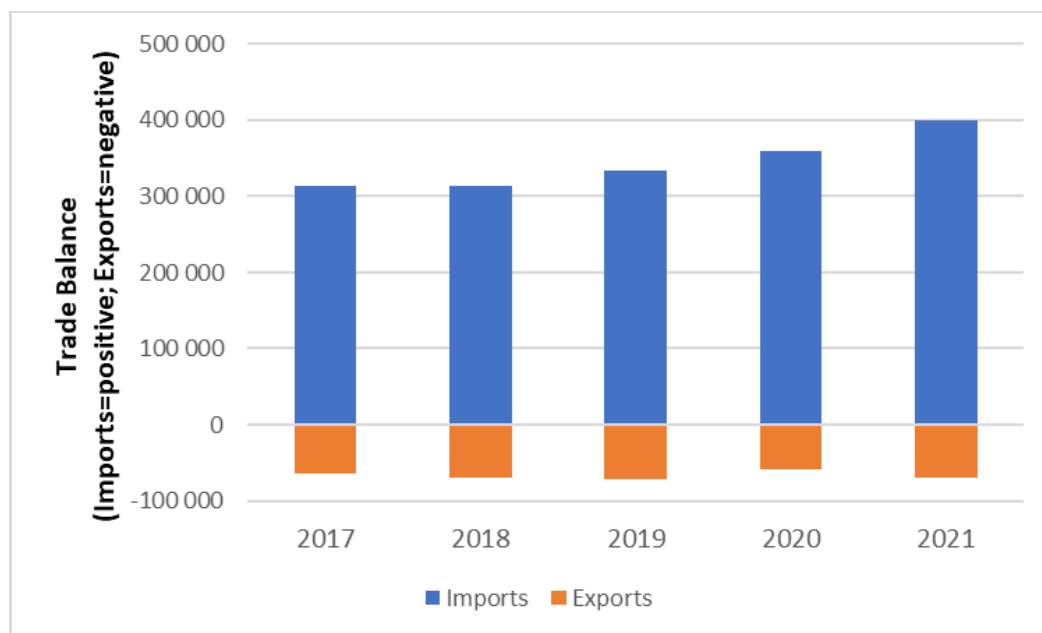
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<sup>55</sup> Is Switzerland the ultimate land of bread?!, <https://www.newlyswissed.com/switzerland-land-of-bread/>

<sup>56</sup> Swiss bread – what makes it different (2020), <https://fondue.bg/en/swiss-bread-what-makes-it-different-en/>

<sup>57</sup> Euromonitor International, Packaged food (2021)

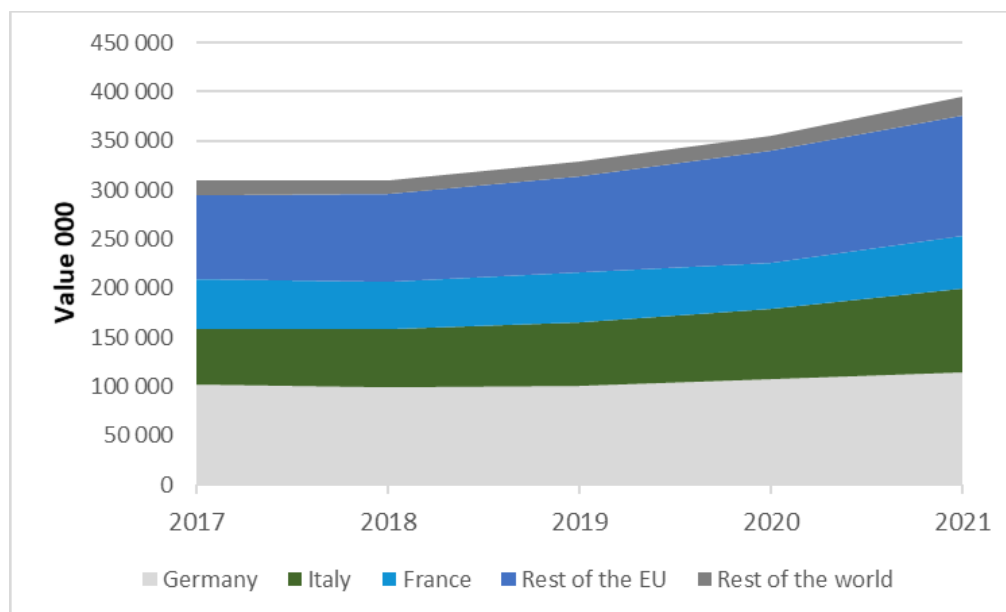
**Figure 5-59: Trade balance (imports and exports) of baked goods in Switzerland, 2017-21; value EUR 000**



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

Data for CN code 190590

The main exporter of baked goods to Switzerland in 2021 was Germany, with an exported value of around EUR 115 million. Germany was followed by Italy with around EUR 85 million and France with approximately EUR 54 million as shown in Figure 5-60. Germany alone accounted for close to 30% of the total value of baked goods exports to Switzerland in 2021. Besides these three countries, Austria, Spain, Belgium, and the Netherlands are important exporters to Switzerland as well. In total, EU exports accounted for close to 94% of total exports to Switzerland in 2021. The main non-EU exporters were Thailand and the United Kingdom.

**Figure 5-60: Swiss imports of baked goods by country, 2017-21 value 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, EU baked goods products with GI protection are further granted full protection in Switzerland.

## Main competitors

Domestic production is the main competition for products from the EU. The largest competitor is Migros Genossenschaftsbund eG, however other companies such as Coop Genossenschaft, and Aryzta Food Solutions Schweiz AG are main competitors as well. That said, the larger companies combined only hold about a quarter of the market. Other important domestic competitors, therefore, include the many small artisanal bakeries that produce high-quality and fresh products.

As the EU is by far the main exporter of baked goods to Switzerland, competition from other exporting countries is low. EU exports account for 94% of all exports. However, the top non-EU exporters of baked goods to Switzerland are Thailand and the United Kingdom.

### 5.14.4 Specific market entry requirements

#### Market Access and Entry

For biscuit and cereal bars which do not meet Swiss technical standards, marketing authorisation for foodstuffs under the Cassie De Dijon principal is required. Biscuit and cereal bars containing coffee, sugar or edible oils will need to further obtain a general permit for the importation of grains, fodder and foodstuffs.

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 baked goods category from Italy to Switzerland**

[Search | Access2Markets \(europa.eu\)](#)

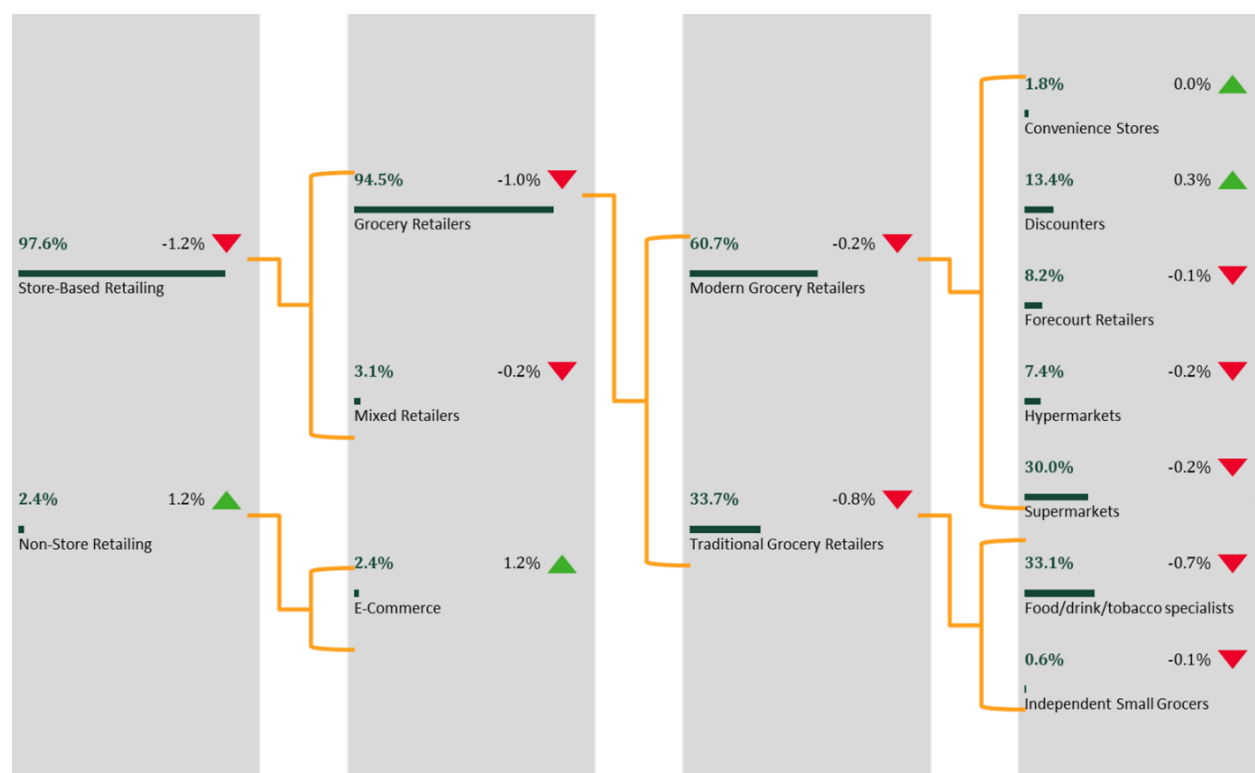
## Standards, SPS measures, labelling

Biscuit and cereal bar products must conform to the labelling requirements for packaged foods set out in section 4.2.3

### 5.14.5 Distribution

In 2021 nearly all retail value of baked goods came from store-based retailing (97.6%) as depicted in Figure 5-61. The remaining 2.4% of the retail value came from e-commerce. The popularity of e-commerce as a channel has been growing in recent years. The two main modern grocery channels are supermarkets with about 30.0% and discounters with 13.4%. Food/drink/tobacco specialists – notable bakeries - are the most popular traditional grocery retailers with 33.1%.

**Figure 5-61: Distribution channel overview of baked goods in Switzerland in 2021; retail value**



Source: Euromonitor International: Packaged Food, 2021.

### 5.14.6 Challenges for EU products

Even though the EU nearly accounts for all baked goods exports to Switzerland, there are certain challenges to be aware of. First, it is important to note that the Swiss market is dominated by Swiss baked goods companies and local Swiss bakeries that produce locally demanded products. It is not easy to compete against the plentiful local offers which largely pass through very fragmented distribution. Second, consumers demand food that is the healthy and environmentally friendly source. It is necessary to inform consumers how these demands are met when wanting to be successful in the Swiss market. It is currently less easy to sell high in sugar or fat baked goods because they are perceived to be unhealthy.

#### Market Takeaway: Baked Goods

**Consumption:** In 2021, the total market size was around EUR 2.67 billion, forecast to continue to grow at a faster pace than in previous years.

**Competition:** Mainly from domestic companies as well as from the many small artisanal bakeries. EU dominates exports as it accounts for 94% of exported value to Switzerland, however, Thailand and the United Kingdom are export competitors as well.

**Distribution:** Mainly via modern retailers such as supermarkets, and discounters, or via traditional retailers such as food/drink/tobacco specialists.

**Challenges:** Win against diverse and plentiful competition; give enough information to consumers; finding a niche.

**Opportunities:** Bread largest category with the biggest forecasted growth rate. Offering products with healthy nutritious ingredients, organic products, and gluten-free products.

## 5.15 Live plants

### 5.15.1 SWOT analysis

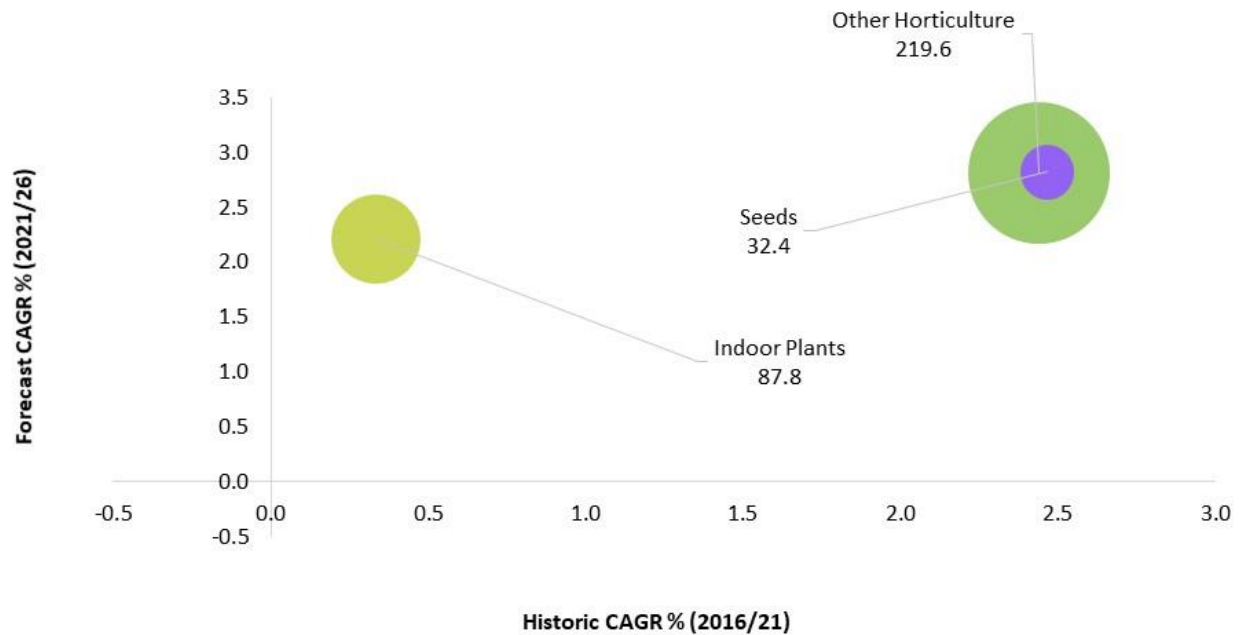
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> <li>▪ EU member states account for almost all of the live plant imports conducted by Switzerland.</li> <li>▪ EU-produced live plant products may be more varied and price attractive.</li> </ul>	<ul style="list-style-type: none"> <li>▪ The reopening of the economy has led to a decline in items being purchased to decorate the home.</li> <li>▪ Consumers are increasingly more appreciative of live plant products produced in Switzerland as the consumer base has become more environmentally conscious.</li> </ul>
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> <li>▪ Use of live plants as a gift or as a decorative item in office buildings which have reopened post-COVID-19.</li> <li>▪ Return to larger social gatherings may encourage the purchase of live plants as a gift product for visitors to give their hosts.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Increasing environmental concerns about imports of flora items from abroad within the Swiss consumer base.</li> <li>▪ Economic uncertainties going forward may impact total sales as live plants are often viewed as an indulgent (non-essential) product.</li> </ul>

### 5.15.2 Consumption

#### Evolution of consumption

As shown below in Figure 5-62 the market for horticultural products in Switzerland is valued at EUR 339 million. The market across the major horticultural categories is expected to grow at a gradual CAGR of 2.5% between 2022 and 2026.

**Figure 5-62: Evolution and forecast of the market for horticultural products in Switzerland, 2016-2026; EUR million**



Source: Euromonitor International: Home and Garden, 2021

## Consumer profile and purchase criteria

### Consumers

The market for live plants in Switzerland is quite strong for imported live plants, with Swiss consumers taking advantage of the higher value of the franc currency to import decorative plants from other markets (largely from the EU). Swiss consumers have a high appreciation for nature (complimented by the unique landscapes of the country which is a key driver of tourism) which helps to drive sales of live plants in the country. Swiss consumers living in urban areas are the key consumers of live plant products in the country due to the increased desire to decorate their homes in areas of the country less prone to natural settings. The use of live plants within offices of white-collar workers is also high in Switzerland as many workers decorate their offices to welcome colleagues and partners visiting from both within Switzerland and from abroad.

### Drivers and method of consumption

A driver of live plant sales in Switzerland in recent years has been the outbreak of COVID-19 which led to increased instances of consumers having to remain within the home, driving demand for products which can be used to decorate the home such as live plants. Consumers further appreciate live plants during the winter months to make the home more colourful during the colder and overall, more grey winter months.

### Purchase criteria

Swiss live plants enthusiast is likely to be drawn to live plants which are domestically grown to a large degree in Switzerland and may adopt several live plants to form a wider collection as a plant enthusiast. Swiss consumers further appreciate live plants which are colourful and have unique scents to be used to decorate the home.

## Recent market trends

The COVID-19 pandemic has had positive impacts on interest in plants and gardening as consumers spend more time at home and helps to explain the growth in exports of live plants to the country in recent years. Going forward this growth in demand for live plants is likely to subside as consumers spend more time outside of the home as restrictions are lifted and the economy fully reopens.

### 5.15.3 Offer

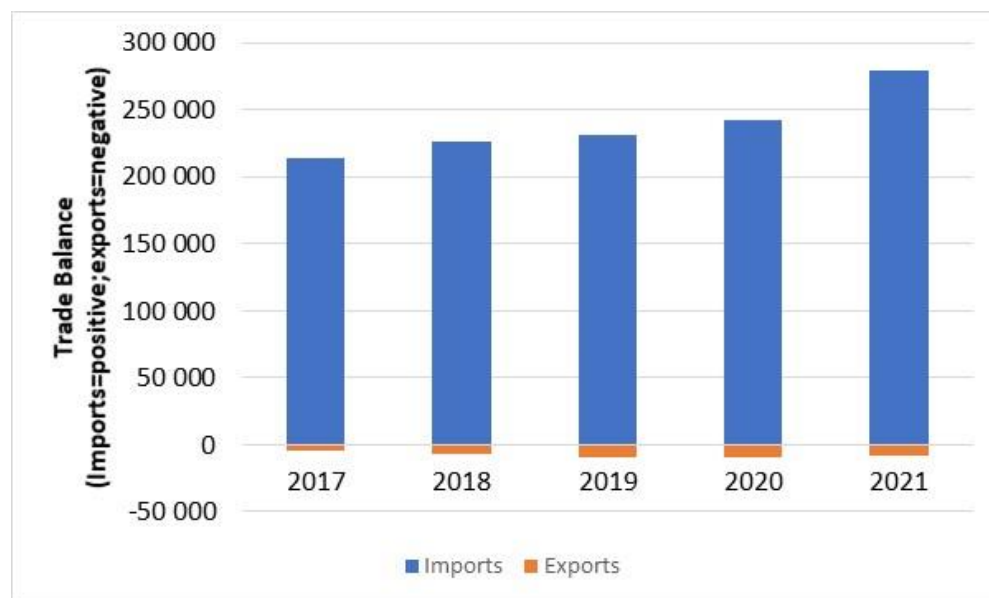
#### Domestic production

Switzerland has several native flora plants which are dotted across the country's mountainous landscape, these include the Alpine Toadflax, Alpine clematis and the Swiss androsace. Demand for these floral products in Switzerland is high however consumers of more premium live plant products will often prefer imported live plants of a wider variety which explains why the flower industry in Switzerland is smaller than in other European countries although demand for the Swiss national flower the edelweiss has grown in Switzerland due to tourism campaigns carried out by various Swiss cantons.

#### Imports and exports

As shown below in Figure 5-63, Switzerland is by far a net importer of live plant products with imports reaching a value of EUR 279 million in 2021. This is a growth from the figure of EUR 213 million recorded in 2017. Total exports are small reaching EUR 8 million in 2021.

**Figure 5-63: Trade balance (imports and exports) live plants in Switzerland 2017-21; value EUR 000**

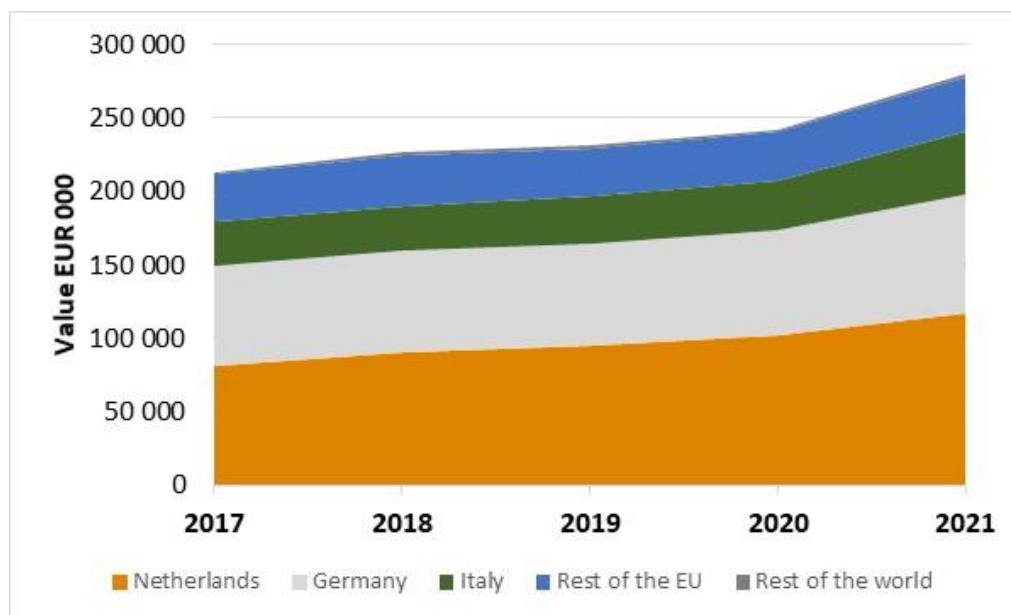


Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 0602

In terms of origin, as shown in Figure 5-64 the Netherlands is the biggest exporter of live plants to Switzerland coming to a value of EUR 116 million. This is followed by Germany at a value of EUR 80 million and Italy at EUR 43 million. EU exports make up the majority of live plant exports arriving in Switzerland exports from outside of the EU are negligible in comparison.

**Figure 5-64: Swiss imports of live plants by country, 2017-21; value EUR 000**



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

Data for CN code 0602.

### Main competitors

The main competitors come from firstly the limited amount of domestic producers' demand for imported live plants comes almost exclusively for live plants coming from the EU.

#### 5.15.4 Specific market entry requirements

##### Market Access and Entry; Standards, SPS measures; labelling

For certain live plant products (060110,060220,060290) there is a to obtain registration with the registration of commercial importers of species coming under CITES which is registered with the Federal food and safety veterinary office (FSVO). A plant passport is further required as proof of the live plant being of EU origin; and a phytosanitary certificate is required. Certain live plants may have additional requirements as well.

The EU and Switzerland share a common SPS area requiring less documentation when sending live plants to Switzerland when compared to other third countries. Nonetheless it is recommended that full requirements are checked at the link below.

**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>

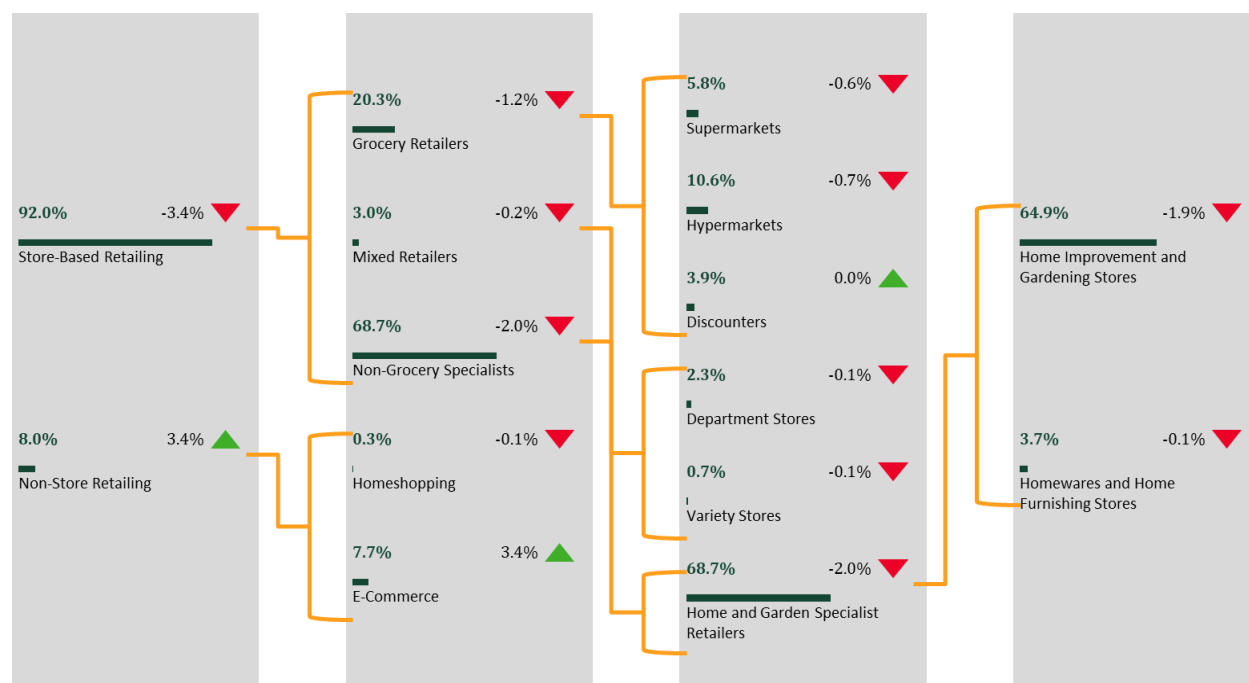
**Example link – live plants category (0602) from the Netherlands to Switzerland**

[Results | Access2Markets \(europa.eu\)](#)

### 5.15.5 Distribution

Figure 5-65 displays the distribution of gardening items as whole – including horticultural products – in Switzerland. Home and garden specialist stores accounted for 64.9% of sales in the country followed by hypermarkets which have a share of 10.6% of sales. E-commerce is rapidly growing and now accounts for 7.7% of all sales, aided by the outbreak of COVID-19. Supermarkets account for 5.8% of sales followed by discounters with a share of 3.9%.

**Figure 5-65: Distribution channel overview of garden items in Switzerland (2021); retail value**



Source: Euromonitor International: Home and garden, 2021.

### 5.15.6 Challenges for EU products

The biggest challenges for entering the Swiss market are the forecasted fall in demand for certain live plants which have been used to decorate the home, as Swiss consumers spend more time outside of the home post-COVID-19. Swiss consumers further retain environmental concerns about buying certain live plant products although this trend has only impacted the market to a very limited degree.

**Market Takeaway: Live plants.**

**Consumption:** Growth in sales in recent years, mainly aided by the outbreak of COVID-19 which resulted in consumers spending more time in the home which increased the desire to purchase decorative items.

**Competition:** Mainly from smaller domestic producers, competition from outside of the EU is very limited.

**Distribution:** Mainly sold in garden and home improvement retailers with a large percentage also coming from e-commerce channels.

**Challenges:** Competing in a market which is seeing an overall decline in demand for decorative items as consumers spend less time in the home post-COVID-19.

**Opportunities:** The use of EU live plants as a gift or as a decorative item are the two biggest opportunity areas in the Swiss live plant market.

## 6 Communication

### 6.1 Communication strategy

Companies wanting to market products and advertise in Switzerland have different channels to consider. The aim of this section is to breakdown each section of the mass media landscape in Switzerland 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.

#### ***Use of appropriate Language***

Advertising statements must be correctly understood by Swiss consumers. In this respect, translations of the advertising materials in the national languages (German, French, Italian) are required for an advertiser in Switzerland. Even if most consumers understand another language, advertising must always be in the language of the region where it is distributed.

#### 6.1.1 Online & Digital Media

Online media usage in Switzerland is very high. An estimated 98% of the population has access to the internet. Consequently, there is internet access throughout virtually all of Switzerland, including areas located without the country's mountainous alpine regions. Google is the most used search engine in the country by a considerable distance (92% of internet searches in the country are via google) this in turn makes google a key advertising channel in the country, as is the case in most European countries.

The average usage of the internet per day by an average Swiss is estimated to be 4 hours and 30 mins which is roughly in line with usage in European nations. Larger digital advertising agencies will focus on urban areas located within the Swiss central plain such as Geneva, Lausanne and Zurich which is home to the majority of the Swiss population. Digital advertisers may also specialise in the production of material in one language of Switzerland which is something that should be consulted before going into business with a potential digital marketing partner.

Digital advertising agencies may provide companies with support to develop a successful digital marketing strategy. The box below shows just an example of some larger digital advertising companies. However, as Switzerland is a unique country in the sense of governance and local advertising practises, it is important to partner with a digital advertising agency with key awareness of not only nationwide trends and practises but also trends and practises impacted local areas of the country.

**Notable Swiss Digital Advertising Agencies:<sup>58</sup>**

Enigma Swiss, <https://enigma.swiss>

Constellate Creatives <https://constellatecreatives.com/>

Z Digital Agency <https://www.zdigitalagency.com/>

R17 Ventures <https://www.r17ventures.com/>

Highway-61 <https://www.highway-61.ch/>

The Swiss Peak <https://www.theswisspeak.ch/>

Eminence <https://eminence.ch/>

### **Social media platforms**

Against the background set out above of the increasing importance of digital media in Switzerland, social media is a key marketing channel in the country. It is estimated that roughly 86.5% of the Swiss population have at least one social media account, with the social media platforms WhatsApp, YouTube and Facebook being the three most popular social media platforms in Switzerland.

Social media usage is particularly popular among younger consumers and is less associated with older consumers. The largest age group that uses social media daily are those aged 25-34 which account for roughly 27% of all total users. Some more figures relating to social media figures include:

- 98% of social media users will visit their accounts at least once a month.
- The average amount of time spent on social media comes to roughly 1 hr and 25 mins a day.
- The average internet users have roughly 6.9 social media accounts across various platforms.
- A third of social media users use their accounts for work purposes.<sup>59</sup>

### **YouTube**

YouTube is one of the most popular social media platforms amongst consumers aged 16-64, with 81% of social media users using this site at least once a month. The potential audience through using YouTube to advertise in Switzerland is 7.1 million with the Swiss YouTube audience being split roughly in half with males accounting for 52% of users and females accounting for 48% of users. The most common user is a 25–34-year-old female. Many Swiss Youtubers will produce content in English as a method of using a neutral language to communicate with Swiss audience members.

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<sup>59</sup> Digital market report – Switzerland, Hootsuite, available at <https://datareportal.com/reports/digital-2021-switzerland>

### Notable YouTube food-orientated channels in Switzerland

Love Food Dish - <https://www.youtube.com/channel/UC7Rh6c96CDzBzQ1U7aLnWHA>  
 Helvetic Kitchen [https://www.youtube.com/channel/UCzEypR\\_fqMfkMfRnkYKn2hA](https://www.youtube.com/channel/UCzEypR_fqMfkMfRnkYKn2hA)  
 Cuisine Helvetica <https://www.youtube.com/channel/UCn6Q5nllb6lXbtqbJHZ5s9A>  
 Food Freaks <https://www.youtube.com/c/FoodfreaksCh>

### Facebook

Facebook is the third most popular social media platform in Switzerland with roughly 69% of internet users in the country having a Facebook social media account. An estimated 52% of Facebook users are female with the largest age group being users aged 25-34. Facebook has emerged as a key advertising channel for food and beverage producers and retailers in recent years in Switzerland.

### LinkedIn

The social media platform LinkedIn is widely used in Switzerland, especially among professionals working in the country's banking, investment and financial sectors as a tool to network. It is estimated that 3.2 million internet users in Switzerland have a LinkedIn account with 58% of users being male and 42% of users being female. Food and beverage advertising via LinkedIn in Switzerland will likely revolve around the latest developments and innovations in the food and beverage sector in Switzerland.

### Instagram

Instagram is increasingly popular in Switzerland with Instagram being commonly used to advertise goods and services in the country, particularly among the younger generation. The role of influencers acting through Instagram has normalised in Switzerland and because of this, influencers are increasingly important for advertising in the country. Swiss Instagram users will often advertise food and beverage products alongside the unique mountainous landscape of Switzerland. Also, in Switzerland, it is more common for influencers to promote a healthier "outgoing" lifestyle rather than the promotion of unhealthy food and beverage products.

### Top Food Instagram influencers in Switzerland

Natural Kitchen <https://www.instagram.com/natuki.ch/?hl=>  
 Smart Gusto <https://www.instagram.com/smartgusto/?hl=>  
 We Love Food <https://www.instagram.com/fooby.ch/?hl=>  
 Vegans of Zuri <https://www.instagram.com/vegansofzuri/?hl=>

### Other platforms

The above four platforms are the most popular in Switzerland. However, Twitter, TikTok and Pinterest are also popular platforms each used by around a third of internet users. These platforms may additionally provide opportunities for the promotion of food and beverages in Switzerland although the total usage of these platforms is much smaller when compared to Facebook, YouTube and Instagram.

## Food blogs

Another interesting option to promote EU food products in Switzerland is to work closely together with food bloggers. There are possibilities to hire food bloggers and 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 Switzerland identified above also have blogs.

The box below contains a selection of notable food bloggers in Switzerland, though this list is not extensive and certain blogs may be particularly relevant for certain food and beverage products. The box below does include some of the owners of the YouTube and Instagram accounts previously mentioned. The sources in the footnotes may be referred to for more comprehensive lists of food bloggers.

### Selected top Switzerland Food Bloggers

We love food <https://fooby.ch/en.html>

Vegans of Zuri <https://www.newlyswissed.com/author/yolanda/>

Travel food atlas (Switzerland) <https://travelfoodatlas.com/>

Swiss Food <https://swissfood.store/>

## 6.1.2 Traditional Media

Regular transmission of television began in 1953 in Switzerland and has since grown to be one of the main channels of communication in the country. It is estimated that 65% of Swiss residents watched TV at least once a day, a figure that is slowly beginning to decline as the rise of the smart phone and mobile devices continues to impact the total usage of traditional media outlets. The Swiss media market is small and highly fragmented, subdivided into a relatively large German-language media market, a smaller French-language market in the west as well as a very small Italian-language market in the south of the country. The largest German-speaking TV channels include SRF:1, SRF ZeiW and 3sat. The larger French-speaking TV channels are RTS un, RTS Deux and TVM3. There are 3 main Italian-speaking TV channels which are RSI La 1, RSI La 2 and Tele Ticino, there is not a television channel at present that broadcasts solely in the Romansch language. Despite a decline in total viewership of TV in Switzerland in recent years, this medium remains key in the promotion of food and beverages in the country.

Radio usage in Switzerland is also highly fragmented with many radio stations likely to focus on developments in one city or within one canton. Unlike television, there is one dedicated radio channel catering to the Romansh-speaking population, RTR radio.

Newspaper usage in Switzerland, as is the case in many European countries, has declined in recent years due largely to the rise of mobile device usage and concerns about the environmental impact of mass newspaper production. The most circulated German newspaper is *20 Minuten* with a readership of around 780 000, the largest French newspaper is *Le Matin* with roughly 340 000 readers, and the largest Italian newspaper is *Corriere Del Ticino*. Smaller newspapers produced in the Romansh language include *La Quotidiana*.

### 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 and cover a broad range of sectors and are generally becoming a more attractive and sophisticated method for in-country product promotion and industry networking. Larger trade fairs and exhibitions will likely take place in Zurich or Geneva although fairs and exhibitions are common across most major urban centres in Switzerland. EU food and beverages will likely be prominently displayed and advertised at major international food and beverage fairs in Switzerland owing to cultural similarities and Switzerland being geographically surrounded by large EU food and beverage producers.

A list of selected major upcoming food-related events and fairs can be found in section 8.4. Additional comprehensive lists including more specialist and niche fairs can also be found online at websites such as:

- [Food & Beverages Trade Shows in Switzerland - Expos, Trade Fairs & Exhibitions \(10times.com\)](http://10times.com)
- [Trade Fairs Switzerland | worldwide \(tradedairdates.com\)](http://tradedairdates.com)

## 6.2 Advertising regulations

The primary law relating to the advertising of food and beverages in Switzerland is the federal act on foodstuffs and utility articles. The act covers several areas relating to food and beverages from production practised to hygiene; however, Section 4 in particular is relevant for the advertising of food and beverage products as it concerns deception concerning foodstuffs. More specifically, the section covers the following points:

1. All information relating to a foodstuff, and in particular, the properties that it is claimed to have must be true.
2. Advertising for foodstuffs and their presentation and packaging must not mislead the consumer.
3. Information about a foodstuff or its presentation is considered to be misleading if it is liable to deceive the consumer as to the manufacture, composition, properties, method of production, storage life, origin or any other particular effects.
4. Foodstuffs must not be imitated to cause deception nor be manufactured, handled, offered, presented or advertised misleadingly.

The principal regulator of this act concerning labelling is the federal council of Switzerland.

The advertising of **alcoholic beverages** is regulated by the alcohol act, there are several restrictions in place concerning the advertising of alcoholic products which include

#### **Spirits**

Prohibited:

- In places of public purpose such as train stations and government buildings
- In public transportation vehicles
- On sports fields and sporting events
- In establishments that sell pharmaceutical products
- On TV and radio

- Advertising specifically catered to minors

### **Wine/beer**

Prohibited:

- Advertising specifically catered to minors
- Advertising at events and public buildings which are mainly attended by minors

There are no restrictions relating to the bottle design, however, restrictions exist relating to lifestyle adverts (must be related to the alcoholic beverage in question) only bartenders' hands preparing the drink may be shown (i.e. other parts of their body may not be shown). No deceptions of lifestyle choices may be displayed.<sup>60</sup>

Advertising of **infant food** also has several restrictions such as

- Information on infant food products cannot claim the product to be equal to or better than breastfeeding.
- There is no point-of-sale advertising allowed and sample distribution or any other direct-to-consumer promotional practices are banned.
- Manufacturers cannot provide free or low-cost products at a discount.

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<sup>60</sup> Alcoholic advertising under Swiss Law, GALA, available at [https://www.vischer.com/fileadmin/uploads/vischer/Documents/Publications\\_Presentations/ANBE\\_Alcohol\\_advertising\\_under\\_Swiss\\_law\\_Nov\\_2019.pdf](https://www.vischer.com/fileadmin/uploads/vischer/Documents/Publications_Presentations/ANBE_Alcohol_advertising_under_Swiss_law_Nov_2019.pdf)

## 7 Swiss Etiquette

### 7.1 Quick facts

It is important to remember that Switzerland is a small but diverse country with many regions having their cultural dos and don'ts which should be researched additionally to a nationwide general do and don'ts. Switzerland is however a highly globalised country and citizens are well accustomed to encountering foreigners who may not fully understand local or national cultural etiquette which makes it less likely that any minor deviation from cultural norms in Switzerland will offend. Many cultural norms are also influenced by the country's neighbours concerning the language spoken in Switzerland; for example, cultural norms in Romandie will mirror those of France, Ticino mirrors many Italian cultural norms and Northern and central Switzerland will mirror German cultural norms. Swiss citizens however are proud of their country and will be quick to point out differences that exist in Switzerland when compared to its larger neighbours.

### 7.2 Key DOs and DON'Ts

Dos	Don'ts
<ul style="list-style-type: none"> <li>• Research the language spoken in the region you intend to travel to. German is the most spoken language of the country overall although there exist many regions where German is not spoken at all.</li> <li>• Respect the traditional Swiss greeting, which is three kisses on the cheek, although a handshake is more formal in business settings.</li> <li>• Be punctual as this is a trait appreciated by Swiss citizens. If you are running late make sure to inform your host to avoid any ill feelings.</li> <li>• While many Swiss speak English, a formal greeting in the local language will be appreciated, as will efforts to speak the local language in day-to-day activities.</li> <li>• Observe that many business meetings will bring with them the expectation of wearing formal business attire.</li> <li>• Bring a business card as this is very commonly exchanged in Switzerland.</li> </ul>	<ul style="list-style-type: none"> <li>• Avoid comparing Switzerland to its larger neighbours as the Swiss are proud of their country and won't appreciate being compared.</li> <li>• Do not discuss ongoing political issues in Switzerland.</li> <li>• Avoid calling someone by their first name, instead in the business setting use their second name.</li> <li>• Do not bring an extravagant gift to a business meeting as this is not a normal business practice and may be perceived as an attempt at bribery.</li> <li>• There is no obligation to tip in Switzerland although it will be appreciated if the service was exceptional.</li> <li>• Avoid talking too loudly as this is not normally done in Switzerland.</li> <li>• Do not ask personal questions relating to salary, religion or age as Swiss citizens highly respect personal privacy.</li> </ul>

## 8 Directory of Trade Support Projects, Organisations, and Service Providers

There are a variety of services available, both within the EU and in Switzerland, for producers wishing to export to Switzerland. These service providers include EU-funded projects, services provided by the Member States and their embassies, other organizations and service providers, as well as buyers, importers, and distributors.

- Section 8.1 contains the project profiles for EU-funded initiatives operating in Switzerland.
- Section 8.2 contains the contact information for Member State embassies within Switzerland.
- 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 Switzerland in 2022-23.
- Section 8.5 contains a database of professionals' contacts (buyers, importers, and distributors).

### 8.1 European Union Organisations

Certain EU-funded, or co-funded, projects within Switzerland offer a range of business-enabling services and information providing important insights into the Swiss market. Depending on your company profile these services can be free or fee-based; and are available for companies from any EU Member State.



#### Swiss-Central Europe chamber of commerce

The Swiss-Central Europe chamber of commerce is made up of members from Switzerland, Albania, Bosnia and Herzegovina, **Bulgaria, Croatia, Czechia, Estonia, Hungary, Latvia, Lithuania**, North Macedonia, Montenegro, **Poland, Romania**, Serbia, **Slovakia** and **Slovenia**. As several EU member states are members of the Swiss-Central Europe chamber of commerce there exists a platform for these countries to advocate their interests to relevant organisations operating in Switzerland.

#### Contacts

 Handelskammer Schweiz-Mitteleuropa (SEC)

Zurich

 (+41) 79 378 83 91


 <https://cee.swiss/>




### Swiss Baltic chamber of commerce

The Swiss Baltic chamber of commerce (SBCC) exists to facilitate the development of business relations and strategic partnerships between Switzerland and the Baltic states of Estonia, Latvia and Lithuania. This chamber of commerce provides an additional platform for businesses from the Baltic states to promote their activities in Switzerland.

#### Contacts

 Gonsiori 34-8 Tallinn Estonia

 (+372) 6 311 577


 [swisschamber@sbcc.ee](mailto:swisschamber@sbcc.ee)




### Delegation of the European Union to Switzerland

The EU delegation in Switzerland represents the common interests of the European Union in Switzerland and works on enhancing and developing trade relations between the two markets. Except for consular tasks, the delegation in Bern functions like an embassy. It is a diplomatic mission to represent the European Union in Switzerland.

#### Contacts

 Christoffelgasse 6

 (+41) 31 310 15 30



 [delegation-switzerland@eeas.europa.eu](mailto:delegation-switzerland@eeas.europa.eu)

 <http://eeas.europa.eu/delegations/switzerland>

## 8.2 Directory of EU Member State Embassies/Consulates

EU MS	Address	Contact information
<b>Austria</b> (Embassy)	Kirchenfeldstrasse 77-79 Bern	☎ (+41) 31 356 52 52 ✉ <a href="mailto:bern-ob@bmeia.gv.at">bern-ob@bmeia.gv.at</a> 💻 <a href="https://www.bmeia.gv.at/">https://www.bmeia.gv.at/</a>
<b>Belgium</b> (Embassy)	Weltpoststrasse 4 Bern	☎ (+41) 31 350 01 60 ✉ <a href="mailto:bern@diplobel.fed.be">bern@diplobel.fed.be</a> 💻 <a href="https://switzerland.diplomatie.belgium.be/">https://switzerland.diplomatie.belgium.be/</a>
<b>Bulgaria</b> (Embassy)	Benastrasse 02-04 Bern	☎ (+41) 31 351 14 55 ✉ <a href="mailto:Embassy.Bern@mfa.bg">Embassy.Bern@mfa.bg</a> 💻 <a href="https://www.mfa.bg/">https://www.mfa.bg/</a>
<b>Croatia</b> (Embassy)	Thunstrasse 45 Bern	☎ (+41) 31 352 02 36 ✉ <a href="mailto:vrhbern@mvep.hr">vrhbern@mvep.hr</a> 💻 <a href="http://www.mvep.hr/">http://www.mvep.hr/</a>
<b>Czech Republic</b> (Embassy)	Muristrasse 53 Bern	☎ (+41) 031 350 40 70 ✉ <a href="mailto:bern@embassy.mzv.cz">bern@embassy.mzv.cz</a> 💻 <a href="https://www.mzv.cz/">https://www.mzv.cz/</a>
<b>Denmark</b> (Embassy)	Thunstrasse 95 Bern	☎ (+41) 31 350 54 54 ✉ <a href="mailto:brnamb@um.dk">brnamb@um.dk</a> 💻 <a href="http://schweiz.um.dk/">http://schweiz.um.dk/</a>
<b>Estonia</b> (Honorary Consulate)	Schaffhauserstrasse 550 Zurich	☎ (+41) 44 363 67 67 ✉ <a href="mailto:admind@estonianconsulate.ch">admind@estonianconsulate.ch</a> 💻 <a href="https://vienna.mfa.ee/">https://vienna.mfa.ee/</a>
<b>Finland</b> (Embassy)	Weltpoststrasse 4 Bern	☎ (+41) 31 350 4100 ✉ <a href="mailto:info.bern@formin.fi">info.bern@formin.fi</a> 💻 <a href="https://um.fi/">https://um.fi/</a>
<b>France</b> (Embassy)	Schosshaldenstrasse 46 Bern	☎ (+41) 31 359 21 91 ✉ <a href="mailto:press@ambafrance.org">press@ambafrance.org</a> 💻 <a href="https://ch.ambafrance.org/">https://ch.ambafrance.org/</a>
<b>Germany</b> (Embassy)	Postfach 83 Bern	☎ (+41) 31 359 41 11 ✉ Contact through website 💻 <a href="https://bern.diplo.de/">https://bern.diplo.de/</a>
<b>Greece</b> (Embassy)	Weltpoststrasse 4 Bern	☎ (+41) 31 356 414 ✉ <a href="mailto:gremb.brn@mfa.gr">gremb.brn@mfa.gr</a> 💻 <a href="https://www.mfa.gr/">https://www.mfa.gr/</a>
<b>Hungary</b> (Embassy)	Eigerplatz 5 Bern	☎ (+41) 31 371 13 55 ✉ <a href="mailto:consulate.brc@mfa.gov.hu">consulate.brc@mfa.gov.hu</a> 💻 <a href="https://bern.mfa.gov.hu/">https://bern.mfa.gov.hu/</a>

EU MS	Address	Contact information
<b>Ireland</b> (Embassy)	Kirchenfeldstrasse 68 Bern	☎ (+41) 31 350 03 80 ✉ Contact through Website 💻 <a href="https://www.dfa.ie/irish-embassy/switzerland">https://www.dfa.ie/irish-embassy/switzerland</a>
<b>Italy</b> (Embassy)	Elfenstrasse 14 Bern	☎ (+41) 31 350 07 77 ✉ <a href="mailto:ambasciata.berna@esteri.it">ambasciata.berna@esteri.it</a> 💻 <a href="http://www.ambberna.esteri.it/">http://www.ambberna.esteri.it/</a>
<b>Latvia</b> (Honorary Consulate)	Feldeggstrasse 55 Zurich	☎ (+41) 43 817 65 46 ✉ <a href="mailto:lettland@granelli.ch">lettland@granelli.ch</a>
<b>Lithuania</b> (Honorary Consulate)	Camille-Vidart 15 Geneva	☎ (+41) 22 748 2488 ✉ <a href="mailto:konsulat/ch@urm.lt">konsulat/ch@urm.lt</a> 💻 <a href="https://ch.mfa.lt/">https://ch.mfa.lt/</a>
<b>Luxembourg</b> (Embassy)	Sulgenauweg 38 Bern	☎ (+41) 31 311 47 32 ✉ <a href="mailto:berne.amb@mae.etat.lu">berne.amb@mae.etat.lu</a> 💻 <a href="https://berne.mae.lu/">https://berne.mae.lu/</a>
<b>Malta</b> (Honorary Consulate)	Parc Chateau Banquet, Geneva	☎ (+41) 22 901 55 05 80 ✉ <a href="mailto:malta-un.geneva@gov.mt">malta-un.geneva@gov.mt</a> 💻 <a href="https://foreign.gov.mt/">https://foreign.gov.mt/</a>
<b>The Netherlands</b> (Embassy)	Seftigenstrasse 7 Bern	☎ (+41) 3135 08700 ✉ Contact through website 💻 <a href="https://www.netherlandsworldwide.nl">https://www.netherlandsworldwide.nl</a>
<b>Poland</b> (Embassy)	Elfenstrasse 20a, Bern	☎ (+41) 31 358 02 40 ✉ <a href="mailto:berno.amb.sekretariat@msz.gov.pl">berno.amb.sekretariat@msz.gov.pl</a> 💻 <a href="https://www.gov.pl/web/szwajcaria">https://www.gov.pl/web/szwajcaria</a>
<b>Portugal</b> (Embassy)	Weltpoststrasse 20 Bern	☎ (+41) 031 352 86 68 ✉ <a href="mailto:berna@mne.pt">berna@mne.pt</a> 💻 <a href="https://berna.embaixadaportugal.mne.gov.pt/">https://berna.embaixadaportugal.mne.gov.pt/</a>
<b>Romania</b> (Embassy)	Kirchenfeldstrasse 78 Bern	☎ (+41) 31 352 35 22 ✉ <a href="mailto:berna@mae.ro">berna@mae.ro</a> 💻 <a href="https://bern.mae.ro/">https://bern.mae.ro/</a>
<b>Slovakia</b> (Embassy)	Thunstrasse 63 Bern	☎ (+41) 31 356 39 30 ✉ <a href="mailto:emb.bern@mzv.sk">emb.bern@mzv.sk</a> 💻 <a href="http://www.mzv.sk/bern">http://www.mzv.sk/bern</a>
<b>Spain</b> (Embassy)	Kalcheggweg 24 Bern	☎ (+41) 031 350 52 52 ✉ <a href="mailto:emb.berna@maec.es">emb.berna@maec.es</a> 💻 <a href="https://www.exteriores.gob.es/">https://www.exteriores.gob.es/</a>
<b>Sweden</b>	Postfach	☎ (+41) 31 328 70 00

EU MS	Address	Contact information
(Embassy)	Bern	 <a href="mailto:Ambassaden.bern@gov.se">Ambassaden.bern@gov.se</a>  <a href="https://www.swedenabroad.se/bern">https://www.swedenabroad.se/bern</a>

## 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
<b>Belgium (Wallonia)</b> AWEX / Wallonia-Brussels, (TPO)	56, Rue de Moillebeau, 1209 Geneva, Switzerland	☎ +41 22 788 48 60 ✉ <a href="mailto:geneve@awex-wallonia.com">geneve@awex-wallonia.com</a>
<b>Cyprus</b> Trade Service of the Ministry of Energy, Commerce and Industry (TPO)	Kurfürstendamm 182 D-10707 Berlin GERMANY	☎ 0049 30 30868329 ✉ <a href="mailto:info@zypern.com">info@zypern.com</a> 💻 <a href="http://www.zypern.com">www.zypern.com</a>
<b>France</b> Business France in Switzerland (TPO)	Pfingstweidstrasse 60, 8005 Zürich, Switzerland	☎ +41 44 279 15 57 ✉ <a href="mailto:noemie.colin@businessfrance.fr">noemie.colin@businessfrance.fr</a>
<b>Greece</b> Enterprise Greece / Office of Economic and Commercial Affairs (TPO)	Office of Economic and Commercial Affairs, Embassy of Greece, Weltpoststrasse 4, Postfach 72, CH-3000 Bern 15	☎ +41 (0)31 356 14 10 ✉ <a href="mailto:ecocom-bern@mfa.gr">ecocom-bern@mfa.gr</a>
<b>Italy</b> Italian Trade Agency (TPO)	Elfenstrasse, 14 - 3006, Bern - Switzerland	☎ +41 0315550210 ✉ <a href="mailto:berna@ice.it">berna@ice.it</a> <a href="https://www.ice.it/it/mercati/svizzera/berna">https://www.ice.it/it/mercati/svizzera/berna</a>

#### Central offices inside EU Member States

EU MS	Address/location	Contact information
<b>Austria</b> Agrarmarkt Austria Marketing (APO)	Austria	💻 <a href="https://www.ama.at/Home">https://www.ama.at/Home</a>
<b>Belgium (Flanders)</b> FIT (TPO)	Belgium	✉ <a href="mailto:michele.surinx@fitagency.be">michele.surinx@fitagency.be</a> 💻 <a href="http://www.flandersinvestmentandtrade.com">www.flandersinvestmentandtrade.com</a>
<b>Belgium (Flanders)</b> Flanders' Agricultural Marketing Board (APO)	Koning Albert II-laan 35 box 50 - 1030 Brussels Belgium	☎ +32 491861700 ✉ <a href="mailto:gert.vancausenbroeck@vlam.be">gert.vancausenbroeck@vlam.be</a> ; <a href="mailto:export@vlam.be">export@vlam.be</a> 💻 <a href="https://www.vlaanderen.be/vlam/">https://www.vlaanderen.be/vlam/</a>
<b>Belgium (Wallonia)</b> AWEX / Wallonia-Brussels, (TPO)	Place Saintelette 2, Brussels, Belgium	✉ <a href="mailto:agrifood@awex.be">agrifood@awex.be</a> 💻 <a href="http://wallonia.be/fr/investir">http://wallonia.be/fr/investir</a>
<b>Belgium (Brussels)</b> (TPO)	Belgium	💻 <a href="https://hub.brussels/en/">https://hub.brussels/en/</a>
<b>Bulgaria</b>	Bulgaria	💻 <a href="https://www.sme.government.bg/en/">https://www.sme.government.bg/en/</a>

EU MS	Address/location	Contact information
Bulgarian Small and Medium Enterprises Promotion Agency (TPO)		
<b>Cyprus</b> Trade Service of the Ministry of Energy, Commerce and Industry (TPO)	6, Andreas Araouzos Street, 1421, Nicosia, Cyprus	 <a href="http://www.mcit.gov.cy/mcit/mcit.nsf/index_en/index_en">http://www.mcit.gov.cy/mcit/mcit.nsf/index_en/index_en</a>
<b>France</b> Business France	77 Boulevard Saint-Jacques, 75014 Paris, France	 <a href="mailto:agroalimentaire@businessfrance.fr">agroalimentaire@businessfrance.fr</a>  <a href="https://www.businessfrance.fr/">https://www.businessfrance.fr/</a>
<b>France</b> SOPEXA (APO)	France	 (+33) 01 55 37 50 00  <a href="mailto:mybusiness@sopexa.com">mybusiness@sopexa.com</a>
<b>Estonia</b> Enterprise Estonia (TPO)	Estonia	 (+372) 6279421  <a href="mailto:info@eas.ee">info@eas.ee</a>  <a href="https://www.eas.ee/?lang=en">https://www.eas.ee/?lang=en</a>
<b>Germany</b> Federation of German Food and Drink (APO)	Germany	 (+49) 30 200786-157  <a href="mailto:bve@bve-online.de">bve@bve-online.de</a>  <a href="https://www.bve-online.de/english">https://www.bve-online.de/english</a>
<b>Greece</b> Enterprise Greece / Office of Economic and Commercial Affairs (TPO)	Greece	 <a href="https://www.enterprisegreece.gov.gr/en/">https://www.enterprisegreece.gov.gr/en/</a>
<b>Hungary</b> Hungarian Export Promotion Agency (TPO)	Hungary	 (+36 ) 1 922 2600  <a href="mailto:info@hepa.hu">info@hepa.hu</a>  <a href="https://hepa.hu/en">https://hepa.hu/en</a>
<b>Ireland</b> Enterprise Ireland (TPO)	Ireland	 <a href="https://www.enterprise-ireland.com/en/">https://www.enterprise-ireland.com/en/</a>
<b>Ireland</b> BoardBia (APO)	Ireland	 <a href="https://www.bordbia.ie/">https://www.bordbia.ie/</a>
<b>Italy</b> Italian Trade Agency (TPO)	Via Liszt 21, Rome, Italy	 <a href="mailto:segreteria.marketing@ice.it">segreteria.marketing@ice.it</a>  <a href="https://www.ice.it/en/">https://www.ice.it/en/</a>
<b>Lithuania</b> Enterprise Lithuania (TPO)	Lithuania	 <a href="https://www.versli Lietuva.lt/en/">https://www.versli Lietuva.lt/en/</a>
<b>Malta</b> Trade Malta (TPO)	Malta	 <a href="https://www.trademalta.org/">https://www.trademalta.org/</a>
<b>Netherlands</b> Netherlands Enterprise Agency (TPO)	Netherlands	 <a href="https://english.rvo.nl/">https://english.rvo.nl/</a>
<b>Portugal</b> Portuguese Trade & Investment Agency – AICEP (TPO)	Portugal	 <a href="https://www.portugalglobal.pt/EN/Pages/Index.aspx">https://www.portugalglobal.pt/EN/Pages/Index.aspx</a>

EU MS	Address/location	Contact information
<b>Slovenia</b> Spirit Slovenia (TPO)	Slovenia	✉ <a href="mailto:sonja.demsar@spiritslovenia.si">sonja.demsar@spiritslovenia.si</a> ; <a href="mailto:info@spiritslovenia.si">info@spiritslovenia.si</a> 🌐 <a href="https://www.sloveniabusines.eu/">https://www.sloveniabusines.eu/</a>
<b>Spain</b> FIAB (APO)	Spain	☎ +34 91 411 72 11 ✉ <a href="mailto:internacionalizacion@fiab.es">internacionalizacion@fiab.es</a>
<b>Spain</b> ICEX	Paseo de la Castellana, 278 - 28046 Madrid, Spain	✉ <a href="mailto:maria.naranjo@icex.es">maria.naranjo@icex.es</a> 🌐 <a href="https://www.icex.es/icex/es/index.html">https://www.icex.es/icex/es/index.html</a>

### 8.3.2 Other service providers

Service provider	Address	Contact information
<b>SERVICES FOR AUSTRIAN COMPANIES</b>		
<b>Advantage Austria Bern/Zurich</b>	Kirchenfeldstrasse 77 Bern	☎ +41 31 356 52 52 ✉ <a href="mailto:Bern@advantageaustria.org">Bern@advantageaustria.org</a> 🌐 <a href="https://www.advantageaustria.org/ch">https://www.advantageaustria.org/ch</a>
<b>SERVICES FOR BELGIAN COMPANIES</b>		
<b>Belgium-Luxembourg chamber of commerce</b>	Avenue Louise 500, Brussels	☎ + 32 02 264 36 53 ✉ <a href="mailto:Info@blrb.org">Info@blrb.org</a> 🌐 <a href="https://www.blrb.org/">https://www.blrb.org/</a>
<b>SERVICES FOR BULGARIAN COMPANIES</b>		
<b>Bulgarian – Swiss chamber of commerce</b>	Nikola Mirchev 35, Sofia	☎ + 359 2 963 33 48 ✉ Contact through website 🌐 <a href="https://www.brcci.ne">https://www.brcci.ne</a>
<b>SERVICES FOR CROATIAN COMPANIES</b>		
<b>Croatian Chamber of Economy</b>	Rooseveltov trg 2, 10000 Zagreb, Croatia	✉ <a href="mailto:investicije@hgk.hr">investicije@hgk.hr</a> ; <a href="mailto:hgk@hgk.hr">hgk@hgk.hr</a> 🌐 <a href="http://www.investincroatia.hr">www.investincroatia.hr</a>
<b>SERVICES FOR CZECH COMPANIES</b>		
<b>Czech Chamber of Commerce and trade for CIS countries</b>	Freyova 27, Prague 9	☎ +420 266 717 811 ✉ <a href="mailto:kordacova@komora.cz">kordacova@komora.cz</a> 🌐 <a href="http://www.komorasns.cz/">http://www.komorasns.cz/</a>
<b>SERVICES FOR CYPRIOT COMPANIES</b>		
<b>Cyprus Chamber of Commerce and Industry</b>	38, Grivas Dhigenis Ave. & 3, Deligiorgis Str., P.O.Box 21455, 1509 Nicosia	☎ +357 22889800 ✉ <a href="mailto:chamber@ccci.org.cy">chamber@ccci.org.cy</a>
<b>SERVICES FOR DANISH COMPANIES</b>		
<b>Swiss-Danish chamber of commerce</b>	Florastrasse 11	☎ +41 76 313 18 92 ✉ <a href="mailto:info@dshk.ch">info@dshk.ch</a> 🌐 <a href="https://dshk.ch/">https://dshk.ch/</a>
<b>SERVICES FOR DUTCH COMPANIES</b>		

Service provider	Address	Contact information
Netherlands chamber of commerce	De Ruijterkade 5	✉ Contact through website 🌐 <a href="https://www.kvk.nl/">https://www.kvk.nl/</a>
<b>SERVICES FOR ESTONIAN COMPANIES</b>		
Estonian Chamber of Commerce & Industry	Toom-Kooli 17, 10130 Tallinn	☎ +372 604 0060 ✉ <a href="mailto:koda@koda.ee">koda@koda.ee</a>
<b>SERVICES FOR FRENCH COMPANIES</b>		
CCI France-Swiss	St Jakobsstrasse 25, Zurich	✉ Contact through website 🌐 <a href="https://www.ccifs.ch/">https://www.ccifs.ch/</a>
<b>SERVICES FOR GERMAN COMPANIES</b>		
AHK Swiss	Todistrasse 60 Zurich	☎ +41 44 283 61 61 ✉ <a href="mailto:auskunft@handelskammer.ch">auskunft@handelskammer.ch</a> 🌐 <a href="https://www.ahk.de/">https://www.ahk.de/</a>
<b>SERVICES FOR GREEK COMPANIES</b>		
Union of Hellenic chamber of commerce	6 Akadimias, Athens	☎ +210 3387 104 ✉ <a href="mailto:keeuhecci@uhc.gr">keeuhecci@uhc.gr</a> 🌐 <a href="https://www.uhc.gr/">https://www.uhc.gr/</a>
<b>SERVICES FOR HUNGARIAN COMPANIES</b>		
Hungarian chamber of commerce and industry	7 Szabadsag, Budapest	☎ +36 1 474 5100 ✉ <a href="mailto:mkik@mkik.hu">mkik@mkik.hu</a> 🌐 <a href="https://mkik.hu/">https://mkik.hu/</a>
<b>SERVICES FOR IRISH COMPANIES</b>		
Enterprise Ireland	East point business park, Dublin 3	☎ +353 1 727 2000 ✉ Contact through website 🌐 <a href="https://www.enterprise-ireland.com/">https://www.enterprise-ireland.com/</a>
<b>SERVICES FOR ITALIAN COMPANIES</b>		
Italian-Swiss chamber of commerce	Seestrass 123 Zurich	☎ +41 44 289 23 23 ✉ <a href="mailto:info@ccis.ch">info@ccis.ch</a> 🌐 <a href="http://www.ccis.ch">www.ccis.ch</a>
<b>SERVICES FOR LATVIAN COMPANIES</b>		
Latvian Chamber of commerce and industry	35 Krisjana Valdemara str., Riga, LV-1010, Latvia	☎ +371 67225592 ✉ <a href="mailto:info@chamber.lv">info@chamber.lv</a>
<b>SERVICES FOR LITHUANIAN COMPANIES</b>		
Lithuanian Chamber of commerce and industry	Vašingtono sq. 1- 63a, LT-01108 Vilnius	☎ +370 2613 102 ✉ <a href="mailto:info@chambers.lt">info@chambers.lt</a> 🌐 <a href="https://chambers.lt/en/">https://chambers.lt/en/</a>
<b>SERVICES FOR LUXEMBURG COMPANIES</b>		
Belgium-Luxembourg chamber of commerce	Avenue Louise 500, Brussels	☎ + 32 02 264 36 5/3 ✉ <a href="mailto:Info@blrb.org">Info@blrb.org</a> 🌐 <a href="https://www.blrb.org/">https://www.blrb.org/</a>
<b>SERVICES FOR MALTESE COMPANIES</b>		

Service provider	Address	Contact information
The Malta Chamber of Commerce, Enterprise and Industry	64, Republic Street, Valletta, Malta	☎ + 356 2203 2000 🌐 <a href="https://www.maltachamber.org.mt/">https://www.maltachamber.org.mt/</a>
<b>SERVICES FOR POLISH COMPANIES</b>		
Polish chamber of commerce	Ul St Marcin 80/82 Poznan	☎ + 61 851 78 48 49 ✉ <a href="mailto:izba@pcc.org.pl">izba@pcc.org.pl</a> 🌐 <a href="http://www.pcc.org.pl/">http://www.pcc.org.pl/</a>
<b>SERVICES FOR PORTUGUESE COMPANIES</b>		
Camara de comercio (Portuguese Chamber of commerce)	Rua Das portas de Santo Antao,89	☎ + 351 213 224 050 ✉ <a href="mailto:geral@ccip.pt">geral@ccip.pt</a> 🌐 <a href="https://www.ccip.pt/en/">https://www.ccip.pt/en/</a>
<b>SERVICES FOR ROMANIAN COMPANIES</b>		
Chamber of Commerce and Industry of Romania	Address: 2, Octavian Goga Blvd, sector 3, 030982 Bucharest	☎ +40 21 3117534 ✉ <a href="mailto:narcis.pirna@ccir.ro">narcis.pirna@ccir.ro</a> 🌐 <a href="http://www.ccir.ro">www.ccir.ro</a>
<b>SERVICES FOR SLOVAK COMPANIES</b>		
Slovak Chamber of Commerce & Industry	Gorkého 9, 81603 Bratislava, Slovakia	☎ +421 2 54433272
<b>SERVICES FOR SLOVENIAN COMPANIES</b>		
Chamber of Commerce and Industry of Slovenia	Dimičeva 13, SI-1504 Ljubljana	☎ +386 1 5898 000 ✉ <a href="mailto:info@gzs.si">info@gzs.si</a>
<b>SERVICES FOR SPANISH COMPANIES</b>		
ASEMPEA	Velazquez 37 Madrid	☎ +34 91 420 24 27 ✉ <a href="mailto:info@asempea.com">info@asempea.com</a> 🌐 <a href="https://www.asempea.com/">https://www.asempea.com/</a>
<b>SERVICES FOR SWEDISH COMPANIES</b>		
SweCham	Stadelhoferstrasse 40 Zurich	☎ +41 43 343 10 51 ✉ <a href="mailto:info@swecham.ch">info@swecham.ch</a> 🌐 <a href="https://swecham.ch/">https://swecham.ch/</a>

## 8.4 Calendar of trade events and exhibitions 2022-2023

Event	Date	Recurrence	Venue	Organiser Details
<b>January 2023</b>				
<b>La Tavolata Di Ascona</b>	3 <sup>rd</sup>	Annual	Lungolago Ascona	☎ (+41) 091 792 18 28 ✉ <a href="mailto:info@amascona.ch">info@amascona.ch</a> 🌐 <a href="https://www.amascona.ch/">https://www.amascona.ch/</a>
<b>International conference on food quality, safety and management</b>	16 <sup>th</sup> - 17 <sup>th</sup>	Annual	Digital conference	✉ Contact through website 🌐 <a href="https://waset.org/food-quality-safety-and-management-conference-in-january-2023-in-zurich">https://waset.org/food-quality-safety-and-management-conference-in-january-2023-in-zurich</a>
<b>March 2023</b>				
<b>Veggie World</b>	11 <sup>th</sup> -12 <sup>th</sup>	Annual	The Vegetarian fair of Zurich	✉ Contract through website 🌐 <a href="https://veggieworld.eco/">https://veggieworld.eco/</a>
<b>Schlaraffia</b>	9 <sup>th</sup> -12 <sup>th</sup>	Annual	Weinfelden	☎ (+41) 071 626 45 02 ✉ Contract through website 🌐 <a href="https://www.schlaraffia.ch/home.html">https://www.schlaraffia.ch/home.html</a>
<b>Whiskyschiff Luzern</b>	30 <sup>th</sup> -1 <sup>st</sup>	Annual	Luzern	✉ <a href="mailto:info@whiskyschiff-luzern.ch">info@whiskyschiff-luzern.ch</a> 🌐 <a href="https://whiskyschiff-luzern.ch/">https://whiskyschiff-luzern.ch/</a>
<b>May 2023</b>				
<b>Vitafoods</b>	1 <sup>st</sup> – 12 <sup>th</sup>	Annual	Palexpo, Geneva	✉ Contact via website 🌐 <a href="https://www.vitafoods.eu.com/">https://www.vitafoods.eu.com/</a>

## 8.5 Database of professionals' contacts

### 8.5.1 List of relevant buyers, importers, and distributors

Company name	Type	Area of interest	Contact information
<b>A.Pougnier</b>	Import/Distribution	Desert themed food and beverages	✉ Contact via website 🌐 <a href="https://www.pougnier-geneve.ch/">https://www.pougnier-geneve.ch/</a>
<b>Aime Pouly</b>	Import/Distribution	Food and Beverages	☎ +41 022 783 33 78 ✉ Contact via website 🌐 <a href="https://aimepouly.ch/">https://aimepouly.ch/</a>
<b>Aldi Ch</b>	Import/Distribution	Major Retailer	✉ Contact via website 🌐 <a href="https://www.aldi-suisse.ch/">https://www.aldi-suisse.ch/</a>
<b>Aligro</b>	Import/distribution	Major Retailer	✉ <a href="#">Contact via website</a> 🌐 <a href="https://www.aligro.ch/">https://www.aligro.ch/</a>
<b>Alnatura</b>	Import/Distribution	Bio-Food	✉ Contact via website 🌐 <a href="https://www.alnatura.ch/">https://www.alnatura.ch/</a>
<b>Amstein</b>	Import/Distribution	Alcoholic beverages	☎ +41 21 926 86 04 ✉ <a href="mailto:info@amstein.ch">info@amstein.ch</a> 🌐 <a href="https://www.amstein.ch/">https://www.amstein.ch/</a>
<b>Arvi</b>	Import/Distribution	Wines	☎ +41 92 649 68 88 ✉ <a href="mailto:info@arvi.com">info@arvi.com</a> 🌐 <a href="https://www.arvi.ch/">https://www.arvi.ch/</a>
<b>Au Petite cosmeticle</b>	Import/Distribution	Italian food specialist	☎ +41 022 311 62 75 ✉ Contact via website 🌐 <a href="https://aupetitcomestible.ch/">https://aupetitcomestible.ch/</a>
<b>Bataillard</b>	Import/Distribution	Wine	☎ +41 41 289 61 61 ✉ <a href="mailto:info@bataillard.ch">info@bataillard.ch</a> 🌐 <a href="https://www.bataillard.ch/">https://www.bataillard.ch/</a>
<b>Beerfarm</b>	Import/Distribution	Alcoholic beverages	☎ +41 022 776 01 04 ✉ Contact via website 🌐 <a href="https://beerfarm.ch/">https://beerfarm.ch/</a>
<b>Berg und Tal</b>	Import/Distribution	Food and beverages	☎ +41 044 271 21 61 ✉ Contact via website 🌐 <a href="https://www.berg-tal.ch/">https://www.berg-tal.ch/</a>
<b>Bianchi</b>	Import/Distribution	Fresh meat, fish	☎ +41 56 649 27 27 ✉ <a href="mailto:order@bianchi.ch">order@bianchi.ch</a> 🌐 <a href="https://www.bianchi.ch/">https://www.bianchi.ch/</a>
<b>Bio-Bergkaseri</b>	Import/Distribution	Dairy Products	☎ +41 027 973 20 80 ✉ Contact via website 🌐 <a href="https://www.biogomser.ch/">https://www.biogomser.ch/</a>

Company name	Type	Area of interest	Contact information
<b>Candy Shop Ch</b>	Import/Distribution	Confectionery Products	☎ +41 071 220 15 55 ✉ <a href="mailto:info@candyshop.ch">info@candyshop.ch</a> 🌐 <a href="https://candyshop.ch/">https://candyshop.ch/</a>
<b>Carnoglob</b>	Import/Distribution	Fresh meat	☎ +41 61 331 80 80 ✉ <a href="mailto:info@carnoglob.ch">info@carnoglob.ch</a> 🌐 <a href="http://www.carnoglob.ch">http://www.carnoglob.ch</a>
<b>Casa del vino</b>	Import/Distribution	Wine	☎ +41 44 295 90 60 ✉ <a href="mailto:mail@casadelvino.ch">mail@casadelvino.ch</a> 🌐 <a href="https://www.casadelvino.ch/">https://www.casadelvino.ch/</a>
<b>Casa Iberica</b>	Import/Distribution	Spanish/Portuguese food and beverages	☎ +41 076 341 92 62 ✉ <a href="mailto:info@casaibericaluzern.ch">info@casaibericaluzern.ch</a> 🌐 <a href="https://www.casaibericaluzern.ch/">https://www.casaibericaluzern.ch/</a>
<b>Celtic Embrace</b>	Import/Distribution	Irish food and beverages	✉ Contact via website 🌐 <a href="https://www.celticembrace.ch/">https://www.celticembrace.ch/</a>
<b>Chas Challer</b>	Import/Distribution	Dairy Products	☎ +41 44 251 38 92 ✉ <a href="mailto:hello@UrbanFoodStore.ch">hello@UrbanFoodStore.ch</a> 🌐 <a href="https://www.urbanfoodstore.ch/">https://www.urbanfoodstore.ch/</a>
<b>Chasbeub</b>	Import/Distribution	Dairy Products	☎ +41 31 311 22 71 ✉ <a href="mailto:info@chaesbueb.ch">info@chaesbueb.ch</a> 🌐 <a href="https://www.chaesbueb.ch/">https://www.chaesbueb.ch/</a>
<b>Cheese Store</b>	Import/Distribution	Dairy Products	☎ +41 041 410 21 88 ✉ Contact via website 🌐 <a href="http://www.barmettler.ch/">http://www.barmettler.ch/</a>
<b>Choco-diffusion / CD Group</b>	Import/Distribution	Chocolate and confectionery	☎ +41 32 930 09 10 ✉ Contact via website 🌐 <a href="https://www.cdgroup.ch/">https://www.cdgroup.ch/</a>
<b>Confiserie Teuscher</b>	Import/Distribution	Chocolate	☎ +41 044 211 51 53 ✉ Contact through website 🌐 <a href="https://teuscher-zurich.ch/">https://teuscher-zurich.ch/</a>
<b>COOP</b>	Import/Distribution	Major Retailer	☎ +41 0848 888 444 ✉ Contact via website 🌐 <a href="https://www.coop.ch/">https://www.coop.ch/</a>
<b>Cosmetics Granada</b>	Import/Distribution	Spanish food and beverages	☎ +41 044 242 16 90 ✉ Contact via website
<b>Covin</b>	Import/Distribution	Spanish and Portuguese food and beverages	☎ +41 44 355 52 72 ✉ <a href="mailto:info@covin.ch">info@covin.ch</a> 🌐 <a href="https://covin.ch/">https://covin.ch/</a>
<b>Declicarlie</b>	Import/Distribution	Scandinavian food and beverages	✉ Contact via website 🌐 <a href="https://www.delicarlie.ch/">https://www.delicarlie.ch/</a>








































Company name	Type	Area of interest	Contact information
<b>Delicarna</b>	Import/Distribution	Fresh meat	☎ +41 61 331 80 80 ✉ Contact via website 🌐 <a href="https://www.delicarna.ch/">https://www.delicarna.ch/</a>
<b>Denner</b>	Import/Distribution	Major Retailer	✉ Contact via website 🌐 <a href="https://www.denner.ch/">https://www.denner.ch/</a>
<b>Drinks of the world</b>	Import/Distribution	Alcoholic beverages	✉ Contact via website 🌐 <a href="https://beerworld.ch/">https://beerworld.ch/</a>
<b>Elliniko</b>	Import/Distribution	Greek food and beverages	☎ +41 44 742 23 23 ✉ <a href="mailto:info@elliniko.ch">info@elliniko.ch</a> 🌐 <a href="https://elliniko.ch/">https://elliniko.ch/</a>
<b>Elzin</b>	Import/Distribution	Olive Oil	✉ Contact via website 🌐 <a href="https://elzin.ch/">https://elzin.ch/</a>
<b>Epicentre de la Gare</b>	Import/Distribution	Major Retailer	☎ +41 78 229 89 71 ✉ <a href="mailto:epicentredelagare@gmail.com">epicentredelagare@gmail.com</a> 🌐 <a href="https://epiceriedelagare.com/">https://epiceriedelagare.com/</a>
<b>Evo O</b>	Import/Distribution	Olive Oil	☎ +41 41 558 95 35 ✉ Contact via website 🌐 <a href="https://www.evoo.expert/">https://www.evoo.expert/</a>
<b>Farmy</b>	Import/Distribution	Food and beverages	✉ Contact via website 🌐 <a href="https://www.farmy.ch">https://www.farmy.ch</a>
<b>Favorit food market</b>	Import/Distribution	Romanian food and beverages	☎ +41 076 266 57 06 ✉ <a href="mailto:info@favoritmarket.ch">info@favoritmarket.ch</a> 🌐 <a href="https://favoritmarket.ch/">https://favoritmarket.ch/</a>
<b>FinnFood</b>	Import/Distribution	Scandinavian food and beverages	☎ +41 043 477 80 40 ✉ <a href="mailto:contact@finnfood.ch">contact@finnfood.ch</a> 🌐 <a href="https://finnfood.ch/">https://finnfood.ch/</a>
<b>Fiorita</b>	Import/Distribution	Fruit and vegetables	☎ +41 76 432 33 30 ✉ <a href="mailto:info@fiorita.ch">info@fiorita.ch</a> 🌐 <a href="https://www.fiorita.ch/">https://www.fiorita.ch/</a>
<b>Forster Gruppe</b>	Import/Distribution	Various inc. fruit and vegetables, dairy	☎ + 41 62 746 93 00 ✉ <a href="mailto:info@forster-gruppe.ch">info@forster-gruppe.ch</a> 🌐 <a href="https://www.forster-gruppe.ch/">https://www.forster-gruppe.ch/</a>
<b>Fromageie Verbier</b>	Import/Distribution	Dairy Products	☎ +41 27 771 29 03 ✉ Contact via website 🌐 <a href="https://www.laiterie-verbier.ch/">https://www.laiterie-verbier.ch/</a>
<b>Fromagerie Bruand</b>	Import/Distribution	Dairy Products	☎ +41 022 736 93 50 ✉ Contact via website 🌐 <a href="https://www.fromage-bruand.ch">https://www.fromage-bruand.ch</a>

Company name	Type	Area of interest	Contact information
<b>Gaucha Delux</b>	Import/Distribution	Meat Products	☎ +41 044 321 18 18 ✉ Contact via website 🌐 <a href="https://gaucha.ch/">https://gaucha.ch/</a>
<b>Genovas</b>	Import/Distribution	Italian food specialist	☎ +41 044 242 23 23 ✉ Contact via website 🌐 <a href="https://genovas.ch/">https://genovas.ch/</a>
<b>George the Greek</b>	Import/Distribution	Greek food and beverages	☎ +41 79 570 2937 ✉ Contact via website 🌐 <a href="https://georgethegreek.ch/">https://georgethegreek.ch/</a>
<b>Giovanelli</b>	Import/Distribution	Fresh fruit and vegetables	☎ +41 52 728 09 09 ✉ Contact via website 🌐 <a href="https://www.giovanelli.ch/">https://www.giovanelli.ch/</a>
<b>Globus</b>	Import/Distribution	Wine	✉ Contact via website 🌐 <a href="https://www.globus.ch/">https://www.globus.ch/</a>
<b>Greek Gourmet</b>	Import/Distribution	Greek food and beverages	☎ +41 043 488 05 47 ✉ <a href="mailto:info@greekgourmet.ch">info@greekgourmet.ch</a> 🌐 <a href="https://www.greekgourmet.ch/">https://www.greekgourmet.ch/</a>
<b>Guidolio</b>	Import/Distribution	Olive Oil	☎ +41 378 02 00 ✉ <a href="mailto:info@guidolio.ch">info@guidolio.ch</a> 🌐 <a href="https://www.guidolio.ch/">https://www.guidolio.ch/</a>
<b>Hello Fresh</b>	Import/Distribution	Food Subscription Delivery	✉ Contact via website 🌐 <a href="https://www.hellofresh.ch/">https://www.hellofresh.ch/</a>
<b>Hopfnung</b>	Import/Distribution	Alcoholic beverages	✉ Contact via website 🌐 <a href="https://hopfnung.ch/">https://hopfnung.ch/</a>
<b>Ikea Switzerland</b>	Import/Distribution	Swedish food and beverages	✉ Contact via website 🌐 <a href="https://www.ikea.com/ch">https://www.ikea.com/ch</a>
<b>Intercosmeticles</b>	Import/Distribution	Alcoholic beverages	☎ +41 044 274 10 10 ✉ Contact via website 🌐 <a href="https://intercomeestibles.ch/">https://intercomeestibles.ch/</a>
<b>International Supermarket</b>	Import/Distribution	Food and beverages	☎ +41 043 477 80 40 🌐 <a href="https://internationalsupermarkt.business.site/">https://internationalsupermarkt.business.site/</a>
<b>Jelmoli</b>	Import/Distribution	Food and beverages	☎ +41 044 220 44 11 ✉ <a href="mailto:kundendienst@jelmoli.ch">kundendienst@jelmoli.ch</a> 🌐 <a href="https://www.jelmoli.ch/">https://www.jelmoli.ch/</a>
<b>Jims British Market</b>	Import/Distribution	Food and beverages	☎ +41 22 364 18 57 ✉ <a href="mailto:webshop@jims.ch">webshop@jims.ch</a> 🌐 <a href="https://jims.ch/">https://jims.ch/</a>

Company name	Type	Area of interest	Contact information
<b>Kiss the Ground</b>	Import/Distribution	Food and beverages	 +41 21 921 59 81  <a href="mailto:producteursuisse@gmail.com">producteursuisse@gmail.com</a>  <a href="https://www.kisstheground.ch/">https://www.kisstheground.ch/</a>
<b>Kreta</b>	Import/Distribution	Greek food and beverages	 +41 764 7076 37  <a href="mailto:Kretainzurich@gmail.com">Kretainzurich@gmail.com</a>  <a href="https://www.kretainzurich.com/">https://www.kretainzurich.com/</a>
<b>La Dula</b>	Import/Distribution	Spanish food and beverages	 +41 022 335 88 88  <a href="mailto:ladula@ladulaiberico.ch">ladula@ladulaiberico.ch</a>  <a href="https://www.ladulaiberico.ch/">https://www.ladulaiberico.ch/</a>
<b>La Maison Du Gruyere</b>	Import/Distribution	Dairy Products	 +41 026 921 84 00  Contact via website  <a href="https://www.lamaisondugruyere.ch/">https://www.lamaisondugruyere.ch/</a>
<b>La Maison Laduree</b>	Import/Distribution	French food and beverages	 Contact via website  <a href="https://www.laduree.ch/">https://www.laduree.ch/</a>
<b>La Peppina</b>	Import/Distribution	Mediterranean food and beverages	 +41 41 661 28 00  <a href="mailto:office@lapeppina.ch">office@lapeppina.ch</a>  <a href="https://www.lapeppina.ch/">https://www.lapeppina.ch/</a>
<b>La vinotec</b>	Import/Distribution	Wine	 +41 22 939 11 12  <a href="mailto:info@lavinotheque.ch">info@lavinotheque.ch</a>  <a href="https://www.la-vinotheque.ch/">https://www.la-vinotheque.ch/</a>
<b>Lackerli Huus</b>	Import/Distribution	Confectionery Products	 +41 61 264 23 23  Contact via website  <a href="https://www.laeckerli-huus.ch/">https://www.laeckerli-huus.ch/</a>
<b>Laderach</b>	Import/Distribution	Chocolate	 Contact via website  <a href="https://laderach.com/">https://laderach.com/</a>
<b>Lapa</b>	Import/Distribution	Italian food specialist	 +41 076 361 7021  <a href="mailto:lapa@lapa.ch">lapa@lapa.ch</a>  <a href="http://www.lapa.ch">www.lapa.ch</a>
<b>Le Mise en Biere</b>	Importer/Distributor	Alcoholic beverages	 +41 21 211 89 22  <a href="mailto:webshop@lamise.ch">webshop@lamise.ch</a>  <a href="https://lamise.ch/">https://lamise.ch/</a>
<b>Les pierogi</b>	Import/Distribution	Polish food specialist	 + 41 78 704 5895  Contact via website  <a href="https://lespierogi.ch/">https://lespierogi.ch/</a>
<b>Lidl Ch</b>	Import/Distribution	Major Retailer	 +41 71 588 05 10  Contact via website  <a href="https://www.lidl.ch/">https://www.lidl.ch/</a>
<b>Little Norway</b>	Import/Distribution	Scandinavian food and beverages	 Contact via website  <a href="https://www.littlenorway.ch/">https://www.littlenorway.ch/</a>

Company name	Type	Area of interest	Contact information
<b>LM Boulangerie</b>	Import/Distribution	French food and beverages	✉ Contact via website 🌐 <a href="http://www.lm.patisserie.boulangerie.com">www.lm.patisserie.boulangerie.com</a>
<b>Loeb</b>	Import/Distribution	Food and beverages	☎ +41 031 320 71 11 ✉ <a href="mailto:info@loeb.ch">info@loeb.ch</a> 🌐 <a href="https://loeb.ch/">https://loeb.ch/</a>
<b>Logam</b>	Import/Distribution	Food and beverages	☎ +41 76 337 95 59 ✉ <a href="mailto:info@lagam.ch">info@lagam.ch</a> 🌐 <a href="https://www.logam.ch/">https://www.logam.ch/</a>
<b>Luma Beef</b>	Import/Distribution	Meat Products	☎ +41 52 670 02 11 ✉ <a href="mailto:info@luma-delikatessen.ch">info@luma-delikatessen.ch</a> 🌐 <a href="https://luma-delikatessen.ch/">https://luma-delikatessen.ch/</a>
<b>Mama Jolie</b>	Import/Distribution	Italian food specialist	☎ +41 21 802 00 03 ✉ Contact via website 🌐 <a href="https://www.mamajolie.ch/">https://www.mamajolie.ch/</a>
<b>Manor</b>	Import/Distribution	Major Retailer	✉ Contact via website 🌐 <a href="https://www.manor.ch/">https://www.manor.ch/</a>
<b>Max Chocolatier</b>	Import/Distribution	Chocolate	☎ +41 41 418 70 90 ✉ <a href="mailto:info@maxchocolatier.ch">info@maxchocolatier.ch</a> 🌐 <a href="https://en.maxchocolatier.com/">https://en.maxchocolatier.com/</a>
<b>Meat Point</b>	Import/Distribution	Meat Products	☎ +41 79 249 83 29 ✉ <a href="mailto:karli@meatpoint.ch">karli@meatpoint.ch</a> 🌐 <a href="https://www.meatpoint.ch/">https://www.meatpoint.ch/</a>
<b>Meat4U</b>	Import/Distribution	Meat Products	☎ +41 056 464 63 66 ✉ <a href="mailto:info@meat4you.ch">info@meat4you.ch</a> 🌐 <a href="https://meat4you.ch/">https://meat4you.ch/</a>
<b>Meet point marketplace</b>	Import/Distribution	Food and beverages	☎ +41 022 755 6350 ✉ Contact via website 🌐 <a href="https://www.meet-point.ch/">https://www.meet-point.ch/</a>
<b>Mertgerei</b>	Import/Distribution	Meat Products	☎ +41 044 563 462 00 90 ✉ <a href="mailto:info@metzgerei-keller.ch">info@metzgerei-keller.ch</a> 🌐 <a href="https://www.metzgerei-keller.ch/">https://www.metzgerei-keller.ch/</a>
<b>Migrolino</b>	Import/Distribution	Food and beverages	✉ Contact via website 🌐 <a href="https://www.migrolino.ch/">https://www.migrolino.ch/</a>
<b>Migros</b>	Import/Distribution	Major Retailer	✉ Contact via website 🌐 <a href="https://www.migros.ch/">https://www.migros.ch/</a>
<b>Moby hicks Beer shop</b>	Import/Distribution	Alcoholic beverages	☎ +41 78 629 31 77 ✉ <a href="mailto:info@mobyhicks.ch">info@mobyhicks.ch</a> 🌐 <a href="https://mobyhicks.ch/">https://mobyhicks.ch/</a>
<b>Mugi Beer shop</b>	Import and retail	Alcoholic beverages	☎ +41 76 522 90 28

Company name	Type	Area of interest	Contact information
			✉ Contact via website 🌐 <a href="https://www.mugi.beer/">https://www.mugi.beer/</a>
<b>Mundo Ag</b>	Import/Distribution	Fruit and Vegetables	☎ +41 288 89 29 ✉ <a href="mailto:verkauf@mundoag.ch">verkauf@mundoag.ch</a> 🌐 <a href="https://www.mundoag.ch/">https://www.mundoag.ch/</a>
<b>My expat shop</b>	Import/Distribution	Food and beverages	☎ +41 22 301 1151 ✉ <a href="mailto:support@myexpatshop.com">support@myexpatshop.com</a> 🌐 <a href="https://www.myexpatshop.com/">https://www.myexpatshop.com/</a>
<b>New Roots</b>	Import/Distribution	Dairy Products	☎ +41 033 557 84 44 ✉ <a href="mailto:info@newroots.ch">info@newroots.ch</a> 🌐 <a href="https://www.newroots.ch/">https://www.newroots.ch/</a>
<b>Nordic expat shop</b>	Import/Distribution	Scandinavian food and beverages	✉ Contact via website 🌐 <a href="https://nordicexpatshop.com/">https://nordicexpatshop.com/</a>
<b>Oil and Vinegar</b>	Import/Distribution	Food and Beverages	☎ +41 31 991 01 96 ✉ <a href="mailto:info@oilvinegar.ch">info@oilvinegar.ch</a> 🌐 <a href="https://www.oilvinegar.ch/">https://www.oilvinegar.ch/</a>
<b>Oil and Vinegar</b>	Import/Distribution	Olive Oil	☎ +41 79 539 25 62 ✉ <a href="mailto:info@oilvinegar.ch">info@oilvinegar.ch</a> 🌐 <a href="https://www.oilvinegar.ch/">https://www.oilvinegar.ch/</a>
<b>Oliven</b>	Import/Distribution	Olive Oil	☎ +41 44 280 87 89 ✉ <a href="mailto:info@olivenundoel.ch">info@olivenundoel.ch</a> 🌐 <a href="https://www.olivenundoel.ch/">https://www.olivenundoel.ch/</a>
<b>Pain Fromage et</b>	Import/Distribution	French food specialist	☎ +41 052 202 21 25 ✉ <a href="mailto:pain.fromage@bluewin.ch">pain.fromage@bluewin.ch</a> 🌐 <a href="https://www.painfromage.ch/">https://www.painfromage.ch/</a>
<b>Pappazino</b>	Import/Distribution	Italian food specialist	☎ +41 041 450 04 06 ✉ <a href="mailto:info@papazziano.ch">info@papazziano.ch</a> 🌐 <a href="https://www.papazziano.ch/">https://www.papazziano.ch/</a>
<b>Pelmeni and More</b>	Import/Distribution	Food and beverages	✉ Contact via website 🌐 <a href="https://pelmeniandmore.ch/">https://pelmeniandmore.ch/</a>
<b>Piccantino</b>	Import/Distribution	Austrian Food and beverages	✉ Contact via website 🌐 <a href="https://www.piccantino.com/">https://www.piccantino.com/</a>
<b>Polish Shop</b>	Import/Distribution	Polish food and beverages	✉ <a href="mailto:info@polish-shop.ch">info@polish-shop.ch</a> 🌐 <a href="https://www.polish-shop.ch/">https://www.polish-shop.ch/</a>
<b>Say chocolate boutique</b>	Import/Distribution	Chocolate	☎ +41 044 211 66 11 ✉ <a href="mailto:pino@saychocolate.ch">pino@saychocolate.ch</a> 🌐 <a href="https://www.saychocolate.ch/">https://www.saychocolate.ch/</a>
<b>ScandiShop</b>	Import/Distribution	Danish food and beverages	☎ +41 078 211 71 45 ✉ Contact via website

Company name	Type	Area of interest	Contact information
			 <a href="https://scandishop.ch/">https://scandishop.ch/</a>
<b>Shamrock Irish Pub</b>	Import/Distribution	Irish food and beverages	 +41 410 63 25  Contact via website  <a href="https://shamrock-luzern.ch/">https://shamrock-luzern.ch/</a>
<b>Siradis</b>	Import/Distribution	Food and beverages	 Contact via website  <a href="https://www.siradis.ch/">https://www.siradis.ch/</a>
<b>Spar</b>	Import/Distribution	Major Retailer	 +41 0800 880 770  Contact via website  <a href="https://www.spar.ch/">https://www.spar.ch/</a>
<b>Springel</b>	Import/Distribution	Chocolate	 +41 44 224 46 46  <a href="mailto:bestell-service@spruengli.ch">bestell-service@spruengli.ch</a>  <a href="https://www.spruengli.ch/">https://www.spruengli.ch/</a>
<b>Swedishness</b>	Distribution	Swedish food and beverages	 +41 43 508 03 11  <a href="mailto://service@swedishness.ch">//service@swedishness.ch</a>  <a href="https://swedishness.ch/">https://swedishness.ch/</a>
<b>Sweetzerland</b>	Import/Distribution	Chocolate	 +41 022 310 49 48  <a href="mailto:chocolats@sweetzerland.net">chocolats@sweetzerland.net</a>  <a href="https://www.sweetzerland.net/">https://www.sweetzerland.net/</a>
<b>Terra Rossa</b>	Import/Distribution	Olive Oil	 <a href="mailto:INFO@TERRA-ROSSA.CH">INFO@TERRA-ROSSA.CH</a>  <a href="https://www.terra-rossa.ch/">https://www.terra-rossa.ch/</a>
<b>Thraki</b>	Import/Distribution	Greek food and beverages	 +41 43 495 03 15  <a href="mailto:info@thraki.ch">info@thraki.ch</a>  <a href="https://thraki.ch/">https://thraki.ch/</a>
<b>Tillsamman</b>	Import/Distribution	Swedish food and beverages	 +41 044 501 75 81  Contact via website  <a href="https://www.tillsamman.ch/">https://www.tillsamman.ch/</a>
<b>Tovarich Spirits</b>	Import/Distribution	Alcoholic Spirits	 +41 22 310 56 45  <a href="mailto:sales@premiumcaviar.ch">sales@premiumcaviar.ch</a>  <a href="http://premiumcaviar.ch/">http://premiumcaviar.ch/</a>
<b>Tritte Casse</b>	Import/Distribution	Dairy Products	 +41 43 366 87 88  <a href="mailto:viadukt@tritt.ch">viadukt@tritt.ch</a>  <a href="https://tritt.ch/">https://tritt.ch/</a>
<b>Ungarischen Laden</b>	Import/Distribution	Hungarian food and beverages	 +41 76 778 01 56  <a href="mailto:ungarischer-laden@shop.ch">ungarischer-laden@shop.ch</a>  <a href="https://ungarischer-laden.shop/">https://ungarischer-laden.shop/</a>
<b>Volg</b>	Import/Distribution	Major Retailer	 +41 058 635 60 13  Contact via website  <a href="https://www.volg.ch/">https://www.volg.ch/</a>
<b>Welschland</b>	Import/Distribution	Dairy Products	 +41 043 243 98 50

Company name	Type	Area of interest	Contact information
			✉ Contact via website 🌐 <a href="http://www.welschland.com/">http://www.welschland.com/</a>
<b>Williams Butchery</b>	Import/Distribution	Meat Products	☎ +41 31 320 75 20 ✉ <a href="mailto:bern@williamsbutcherstable.ch">bern@williamsbutcherstable.ch</a> 🌐 <a href="https://www.williamsbutcherstable.ch/">https://www.williamsbutcherstable.ch/</a>
<b>Wittich wine and beer</b>	Import/Distribution	Alcoholic beverages	☎ +41 062 212 32 11 ✉ <a href="mailto:info@wittich-weine.ch">info@wittich-weine.ch</a> 🌐 <a href="https://www.biershop-wittich.ch/">https://www.biershop-wittich.ch/</a>
<b>Zuger</b>	Import/Distribution	Dairy Products	☎ + 41 71 955 98 77 ✉ <a href="mailto:info@frischkaese.ch">info@frischkaese.ch</a> 🌐 <a href="https://www.frischkaese.ch/">https://www.frischkaese.ch/</a>



## GETTING IN TOUCH WITH THE EU

### In-person

All over the European Union, there are hundreds of Europe Direct information centres. You can find the address of the centre nearest you at: [https://europa.eu/european-union/contact\\_en](https://europa.eu/european-union/contact_en)

### On the phone or by email

Europe Direct is a service that answers your questions about the European Union. You can contact this service:

- by freephone: 00 800 6 7 8 9 10 11 (certain operators may charge for these calls),
- at the following standard number: +32 22999696, or
- by email via: [https://europa.eu/european-union/contact\\_en](https://europa.eu/european-union/contact_en)

## FINDING INFORMATION ABOUT THE EU

### Online

Information about the European Union in all the official languages of the EU is available on the Europa website at: [https://europa.eu/european-union/index\\_en](https://europa.eu/european-union/index_en)

### EU publications

You can download or order free and priced EU publications from: <https://op.europa.eu/en/publications>. Multiple copies of free publications may be obtained by contacting Europe Direct or your local information centre (see [https://europa.eu/european-union/contact\\_en](https://europa.eu/european-union/contact_en)).

### EU law and related documents

For access to legal information from the EU, including all EU law since 1952 in all the official language versions, go to EUR-Lex at: <http://eur-lex.europa.eu>

### Open data from the EU

The EU Open Data Portal (<http://data.europa.eu/euodp/en>) provides access to datasets from the EU. Data can be downloaded and reused for free, for both commercial and non-commercial purposes.

