# Country report: Norway

# Introduction

The current report briefly outlines the state of the food distribution sector in Norway. At the supply side, the report highlights the key characteristics of the supply chain; namely strong vertical integration, a high supplier concentration, high store concentration and low product variety. At the demand side, the report focus on consumers’ shopping patterns, food consumption, and access to stores. Lastly, the report presents recent developments attempting to establish alternative food networks through digital means.

# The food distribution sector: The supply side

By being a non EU-member, Norway and its food distribution industry must adhere to strict regulations affecting import and custom rates. Most notably, many basic agricultural products are protected by border control, such as milk, egg, meat and vegetables (Norwegian Agriculture Agency, 2018).

Since the 1970s, the food value chain has gradually developed from wholesale domination with numerous independent suppliers and retailers towards vertically integrated value chains dominated by three retail groups (NOU, 2011). The vertical integration has increased significantly throughout recent years (Oslo Economics, 2017). The increase in concentration and vertical integration makes it difficult for newcomers to penetrate many parts of the food market. Recent developments have seen an increase in efforts to establish alternative food markets. A notable example is *Bondens Marked*, or the Norwegian Farmer’s Market, which is a small-scale alternative food market with an annual turnover of 66.2 NOK in 2016. Other efforts towards establishing alternative food markets are food delivery through digital platforms – often stemming from local and organic production – such as box schemes and online grocery stores. Such initiatives have witnessed considerable attention from both consumers and investors. Despite this growing interest, the digitalization of the Norwegian food industry is coming along at a very slow speed. Innovation efforts are relatively high, but establishment seems to be difficult as the market stability is poor and many initiatives go bankrupt or are acquired by others. Thus, newcomers such as efforts to create alternative food markets may face serious establishment challenges (Oslo Economics, 2017).

The value chain of the Norwegian food sector (see figure 1) consists of three main levels; production and processing, wholesale, and retail (stores). Three main actors closely govern the wholesale and retail levels: *Coop, NorgesGruppen*, and *Rema*. Two of these (i.e., *NorgesGruppen* and *Coop*) are large retail groups with multiple retail chains. *NorgesGruppen*, for instance, as a retail group distributes food through the retail chain *Kiwi*. *Rema* are operating at both levels. These three main actors are also becoming increasingly involved at the production and processing stage.

Figure 1. The value chain of the Norwegian food sector

## **Horizontal integration**

The food distribution industry in Norway is characterized by a strong chain concentration. Particularly, branch chaining and franchising-systems both have a history within retail management (Jacobsen & Dulsrud, 1994). By employing such systems, the retail groups get comprehensive authorization of the various store units they govern. Almost all grocery stores in Norway are affiliated with a retail group, and most under one of the three dominating groups (see table 1).

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| --- | --- | --- | --- |
| **Retail group** | **Production & processing** | **Wholesale** | **Retail stores** |
| *NorgesGruppen* | Ownership interests in *Bakehuset*, *Joh. Johannson Kaffe*, *Matbørsen*, *Bama*, and *GrøstadGris* | *Asko* distributes products to the group’s chains, catering, and service trade | *Kiwi, Meny, Spar/Eurospar*, *Jacob’s, Nærbutikken* and *Joker*  Both franchise and own stores |
| *Coop* | Ownership interests in *Coop Norge Kaffe, Røra Fabrikker, Margarinfabrikken, Nord Blomst, Tradeway*, and *Gomanbakeren* | *Coop Norway* are responsible for wholesale and logistics for the group’s chains | *Obs, Extra, Coop Prix, Coop Mega, Coop Marked*, and *Matkroken*  Both franchise and own stores |
| *Rema* | Ownership interests *in Norsk Kylling, Hugaas Industrier, Stange, Kolonihagen, Grans Bryggeri, Spekeloftet, Kjelsberg Kaffe*, and *Bama* | *Rema* distributes products to the group’s chains, *Servicegrossistene*, *Kolonial.no, Reitan Convenience*, and *Circle K* | *Rema 1000*  Entirely franchise-driven |

Table 1. The value chain of the food distribution sector by the three dominating retail groups: *NorgesGruppen, Rema*, and *Coop*. Table adapted from Oslo Economics (2017) with added information from Dagligvarefasiten (2018).

As of 2017, 96% of total turnover at retail level and approximately 100% of turnover at wholesale level is achieved through the retail groups (Oslo Economics, 2017). Measured by turnover at the retail level, *NorgesGruppen* is the largest group, closely followed by *Coop* and *Rema*. Taken together, these three groups have a stable average total market share of around 80% (Oslo Economics, 2017). More specifically, in 2017 *NorgesGruppen* controlled 43.1% of the total market share, followed by *Coop* (29.7%) and *Rema* (23.4%). The fourth largest retail group *Bunnpris* only controlled 3.8% of the market share in 2017 with a turnover of 6.4 billion NOK, while other groups controlled merely 0.1% (Nielsen, 2017b).

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| --- | --- | --- | --- |
| **Retail group** | **Market share** | **Turnover (NOK)** | **Store number** |
| *NorgesGruppen* | 43.1 % | 71.6 billion | 1850 |
| *Coop* | 29.7 % | 49.8 billion | 1150 |
| *Rema* | 23.4 % | 41.3 billion | 921 |

Table 2. An overview of market share, turnover, and store number (all as of 2017) for the three dominating retail groups. Numbers retrieved from the annual reports of NorgesGruppen (2017), Rema 1000 (2017), Coop (2017), and Nielsen (2017b).

The food sector is rather profitable compared to other economically important sectors in Norway (Braadland & Hauknes, 2000). Compared to 2015, total turnover[[1]](#footnote-1) for the food sector in 2016 increased with 3.1% (Nielsen, 2017b). In 2017, however, the sector were at a low point with merely 1.1% increase, i.e., 1.9 billion NOK (Nielsen, 2018c). Thus, the sector had a total turnover of 169 billion NOK at the retail level (Nielsen, 2017b). This modest development is likely the result of several factors, but perhaps especially due to increased border shopping, and heightened competition from online food shops and “dollar stores” such as *Nille* and *Europris*. Profit of the food sector during the third quarter of 2018 has however experienced an increase of 2.9 billion NOK – a growth of 2.3% (Nielsen, 2018b). When it comes to specific food products, consumption of frozen food, beverages, and chocolate and other sugar products have witnessed the largest increase in profit. This growth of the latter two food categories is likely due to substantial raises in price resulting from governmental changes in sugar fees. Beverages and refrigerated products and oils contributes the most in terms of absolute growth and have a collected increase of 2.1 billion NOK (incl. VAT). Conversely, cleaning-, household-, health-, and beauty products stand for a collected negative development of approximately 490 billion NOK (incl. VAT). Downwards, the average annual turnover per store in Norway was approximately 50.5 billion NOK in 2015 (Oslo Economics, 2017).

## **Vertical integration**

The Norwegian food distribution sector is also distinguished by its vertical integration where retail groupings gain control over the wholesale level. As a result, there are currently no independent wholesalers in the market. Any independent retailers either has to buy products directly from suppliers or make arrangements of procurement and distribution with one of the retail groups. Historically, suppliers handled the distribution of products to the retailers, but this function is now assumed by the retail groups. Thus, the groups themselves handle the distribution of products from supplier to wholesaler, and from wholesaler to retailer. This vertical structure has contributed to reducing consumer prices, increasing food quality, and improved access to fresh products (Gabrielsen, Steen, Sørgard, & Vagstad, 2013).

The supplier level has also witnessed increased competition, particularly from the retail groups as these have increasingly stepped into the production and processing level through their own brands and products. Consequently, retail groups exert high control over suppliers, for example by threatening to remove supplier products from their assortment or by leveraging their own products in an attempt to reduce procurement prices (NOU, 2011). In 2013, governmental suggestions were put forth, outlining additional regulations as well as implementing a grocery controller board to enforce these regulations in order to increase the efficiency and trust between suppliers and retail groups (NOU, 2013).

## **Store concentration**

The number of food stores has been drastically reduced since the 1980s (Jacobsen & Dulsrud, 1994), and continue to decrease as of 2018 (Nielsen, 2018b). In 1982, there were approximately 8000 food stores, while in 1993 this number was reduced to well below 6000 (Jacobsen & Dulsrud, 1994). As of 2016, there are only 3814 food stores in Norway (Oslo Economics, 2017). During the 90’s, this reduction mostly affected smaller food stores, while the number of larger stores actually experienced a slight increase. Today, the average size of Norwegian food stores is 677 square feet (Oslo Economics, 2017). Recent developments have witnessed an increase in the number of low-cost stores relative to local stores, and super- and hypermarkets.

# Consumer behavior and food consumption patterns: The demand side

## **Shopping patterns**

Norwegian consumers are among the most frequent food shoppers globally, as they on average shop 3.4 times a week (Nielsen, 2016b). Some also use different stores depending on the time of the week. One third of consumers in 2013 said they used different stores when they shop for “everyday” food items compared to “weekend” food items (Forbrukerrådet, 2013). Furthermore, Norwegians are increasingly engaging in border shopping, i.e., travelling to neighboring countries to shop food at more affordable prices. In 2017, such border shopping amounted to 15.1 billion NOK, which is a growth of about 9% compared to 2016 (Nielsen, 2018a).

In 2016, Norwegian households had a total consumption of 1336 billion NOK – twice as much as in 2001 (Virke, 2017). The households’ food consumption, however, has stayed relatively stable at around 12% of the total consumption. An average 4-person household consisting of two adults and two children spend approximately 8149 NOK each month on food and beverages. Consumers are generally highly price aware, as over 70% check the price of food products in-store (Virke, 2017).

## **Store access and opening hours**

Generally, store location and store access are the key factors when consumers determine where they go to shop their food. A majority of consumers in 2013 (76%) named shopping distance as the most important factor of choice of store (Forbrukerrådet, 2013). However, when shopping food for the weekend, consumers where most concerned about product assortment and variety. In terms of store location, *Rema* is the most widespread retail chain in Norway in 2016 but consumers experience *Coop*-chains as closer to where they live. In 2015, there were 0.75 stores per 1000 inhabitants in Norway (Dulsrud & Alfnes, 2016). Norwegian consumers have relatively little retail chain loyalty (likely due to the geographical spread in store concentration) and shop in average in 3.6 different chains during the course of a month (Nielsen, 2016b).

Store opening hours are likely to have an impact on consumer’s food procurement practices as these are restricted by law (Lovdata, 2018), and especially affect those living in rural areas[[2]](#footnote-2). Few stores are open on Sunday’s, although recent years have seen a development towards a liberalization of opening hours equivalent to other European countries (NOU, 2017). In addition to most being closed on Sunday’s, stores also close early on Saturday’s, and have significantly restricted opening hours during national holidays (Lovdata, 2018). These limited opening hours might facilitate the establishment of an alternative food market by increasing demand for digital services such as *Foodora* that can deliver food quickly and outside traditional hours (i.e., Saturday’s, Sunday’s, and evenings).

## **Food consumption**

Two recent nationwide consumer surveys reveals some insights into the majority’s food practices. In 2018, 65% of Norwegians eat breakfast at home every day. 25% say they skip this meal, while 16% eat their breakfast on-the-go twice or more a week (Ipsos, 2018). According to a country representative diary study (*N*=1302) conducted among Norwegians in 2017, pizza is the most common meal for dinner as it is consumed by 50% of consumers at least once during a week (Ipsos, 2017).

Products distributed through the food chain come from national production (approx. 50% in 2017) and imported international brands (Norwegian Directorate of Health, 2018). The average consumer shops food through the traditional distribution channel and is not especially conscious when it comes to making food choices in-store. Norwegians are typically highly trusting towards the government and expert systems relating to food (see for example Torjusen, 2004) and tend to believe that most products are safely and locally produced. Interest in healthy foods is however growing and is currently at an all-time high, as 63% of Norwegians, according to a nationwide consumer survey, say they are very or extremely interested in healthy food (Ipsos, 2018). According to another national, representative survey on Norwegian food practices, consumers want grocery stores and eating places to focus more on sustainable, healthy, ethical, authentic, and high quality food alternatives (Bugge, 2015).

Generally, the majority of consumers focus on taste, nutrition, and price (Ipsos, 2018). A small minority of consumers are concerned with food products focusing on animal welfare, organic production, sustainability, and fair trade. As an example, only 1.8% of food sold in stores are organic (Norwegian Agriculture Agency, 2017; Virke, 2017).

When it comes to the niche market of organic and short-travelled food, consumers say these aspects are most important when it comes to milk, seafood, meat, vegetables, and fruit (Nielsen, 2016a). Sales from organic food produced in Norway increased with over 24% in 2016, comprising almost 2.5 billion.

Albeit still a very small niche market, vegetarianism is growing among Norwegian consumers. A national representative survey conducted among approximately 4000 Norwegian consumers in 2018 found that 24% want to eat less meat (Ipsos, 2018) and a minority are cutting out meat altogether. The most common reasons for this development are due to consumers’ concern for animal welfare, sustainability issues, and health aspects. There is also a generational effect to this development, as a larger share of younger consumers (15-34 years) than older generations (over 35) are willing to eat vegetarian. In 2018, meat replacement products stood for a turnover of 125 billion NOK (Virke, 2017). This vegetarian consumption trend is also reflected in store assortment. Two years ago, all available meat replacement products were frozen, while today fresh products comprise around 45% of turnover.

Yet another niche market among Norwegian consumers relates to dietary restrictions. 22% of consumers in 2017 chose to adjust their diet due to allergies or food intolerances (e.g., gluten, lactose). This is an increase of 8% from 2005 (Ipsos, 2018). Half of consumers feel that the assortment available in traditional retail stores covers their dietary needs (Virke, 2017). Although very small, the aforementioned niche markets are witnessing a steady increase and are especially salient in online shopping and alternative food networks.

## **Diagonal integration**

Enterprises across both profit and non-profit sectors are increasingly employing technologically enabled platforms to achieve more consumer-oriented services, such as the examples mentioned above. There is differentiation between internal and external platforms and how these may affect innovation (Gawer & Cusumano, 2014). Internal supply-chain platforms involve enterprises following clearly defined “guidelines to supply intermediate products or components to the platform owner” (Gawer & Cusumano, 2014:419). External platforms, however, open up to the possibility that apps of external enterprises can provide complementary innovations, induce network effects and that the platform owner does not determine the product or service in advance. This lead to high prospective possibilities for innovative efforts in complementary technological products and services (Gawer & Cusumano, 2014). Such platforms are typically referred to as two-sided or multi-sided within business literature. Digital platforms represents intermediation combining three distinct layers; () a network or community layer combining platform participants and their relationship, (2) an infrastructure layer made up of software tools, rules, apps, and services, and (3) a data layer allowing the platform to try matching supply and demand (Choudary, 2015).

# Online shopping and alternative food networks

The emergence of the platform economy as a specific type of market organization challenges the conventional Norwegian food market governed by supermarket chains and agro-food businesses. This is done by connecting suppliers and consumers in new and innovative modes of provision through digital platforms and includes both business-driven and consumer-driven platforms. There are currently several ongoing digital innovations offering an alternative to the traditional food market. Compared to large-scale retail chains, alternative food networks are differently organized markets that intend to facilitate sustainable food production and offer healthy food alternatives to consumers. The aim is thus to create a different type of market, one that encourages a closer interaction between consumers and producers and, as a result, facilitate knowledge exchange between the two (Hvitsand, 2016). Examples of establishment efforts in Norway are food provision platforms such as food box schemes delivering organic and local food (e.g., *NettMat, Proviant*), informal food networks in social media forums (e.g., *REKO-ring*), and online supermarkets (e.g., *Kolonial.no, Dagligvareexpressen.no*). Several of these provisioning platforms aim to reduce transportation distance and guarantee a certain food quality, often in terms of locally and organically produced food. Moreover, a few initiatives are solely focused on facilitating interaction between businesses, such as the two-sided B2B platform *lokalmat.no*. Finally, there are efforts to establish C2C food markets (e.g., *Oslo kooperativ*), promoting consumers to assume the role of producer and retailer where they can sell or swap their products directly in contact with other consumers through digital means (i.e., apps, websites, social media groups). Although this latter type of initiative is especially uncommon, consumer interest in C2C food markets is spreading. Most initiatives are run primarily through websites, followed by mobile apps. Most have a form of social media presence, usually across several network forums (e.g., Facebook, Instagram, Twitter etc).

Such recent innovations in the food sector have witnessed an increase in use among Norwegian consumers from 2015 to 2016 (Nielsen, 2017b). Around 11.6% of Norwegian consumers in 2017 bought groceries online – twice as many as in 2016 (Nielsen, 2017a). Around 4.2 % of consumers subscribed to a food box scheme in the second half of 2016(Virke, 2017). It is especially families with children who use such box schemes; listing time saving, low delivery costs, and fewer impulse buys as their primary motivations. These digital innovations are currently predominantly available in central urban areas. The geographical location and the widespread settlement in Norway leads to considerable higher prices of logistics and delivery to more rural and remote areas. Despite the exponential increase in sales from online stores and digital food distribution platforms, these are yet to pose a genuine threat to traditional food stores. Nevertheless, insights from other countries than Norway suggest that this is a market segment of great potential. In fact, online food shopping had a total turnover of approximately 2 billion NOK[[3]](#footnote-3) in 2017 (Dagligvarefasiten, 2018) and is expected to reach a staggering 7.5 billion in 2019 (Virke, 2017).

The various digital food channels in Norway may be divided into five main concepts; online hypermarkets (stores with a full assortment like traditional physical hypermarkets), online niche stores (specialized stores with a selected assortment), food box delivery, ready-made meals, and online schemes for food close to its expiration date (see table 3). The two largest actors in this market segment are the online supermarket *Kolonial.no* and the box delivery service *GodtLevert* (Oslo Economics, 2017). The latter buys products directly from suppliers and outsources distribution of the food boxes to third parties. In addition to these larger digital actors, there are a number of smaller niche actors such as *morgenlevering.no* and *kokkeløren.no* (Virke, 2017). These small-scale niche initiatives tend to employ the retailing strategy of long tail retail distribution (Brynjolfsson, Hu & Smith, 2006), meaning they sell uncommon goods. Niche stores typically sell a large number of special products with a relatively small quantity sold of each product combined with selling a few popular mainstream products in larger quantities.

None of the three dominant retail groups of traditional food distribution has a notable focus on online sales. *NorgesGruppen*, however, has started small-scale by selling groceries online through *meny.no, spar.no*, and *joker.no*. The same goes for *Coop*, which offers small-scale online sales of products from *Coop Obs* and *Coop Obs Bygg*. *Rema* owns the box scheme *Kolonihagen* as well as owning 8% shares of the online supermarket *Kolonial.no*, but has no online stores itself as of yet.

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| --- | --- | --- | --- | --- |
| **Channel type** | **Examples** | **Main digital presence** | **Delivery form** | **Organization type** |
| Online hypermarkets | [*Kolonial*](https://kolonial.no/)  [*Rett hjem*](https://www.retthjem.no/)  [*Engros Nett*](https://engrosnett.no/nettbutikk) | Websites  Apps  Social media | Home delivery  Click and collect | Enterprise, cooperative |
| Online niche stores | [*Spekehuset*](https://www.spekehuset.no/)  [*Fiskebilen*](http://www.fiskebilen.no/)  [*Naturbit*](https://www.naturbit.no/) | Websites | Home delivery | Enterprise |
| Box delivery | [*GodtLevert*](https://godtlevert.no/matkasse)  [*Nettmat*](https://www.nettmat.no/)  [*Proviant*](https://proviant.no/) | Websites  Social media | Home delivery  Click and collect | Enterprise |
| Ready-made meals platforms | [*Foodora*](https://www.foodora.no/)  [*Just Eat*](https://www.just-eat.no/)  [*Wolt*](https://wolt.com/) | Apps  Social media | Home delivery  Click and collect | Enterprise |
| Online schemes for expiring food | [*TooGoodToGo*](https://toogoodtogo.no/no)  [*Holdbart*](https://www.holdbart.no/)  [*Matsmart*](https://no.matsmart.com/seeyoulater/) | Apps  Websites  Social media | Click and collect  Home delivery | Informal group/network |

Table 3. Online food supply channels in Norway.

## **Potential establishment challenges**

As previously mentioned, newcomers to the Norwegian food sector are likely to face difficulty becoming integrated due to the high level of concentration. A review of food market studies both at a national and an international level, find that the number of actors that can run profitably is limited. Additionally, Norway has generally fewer actors at the supplier-, retail-, and wholesale level compared to the standard of other countries (Oslo Economics, 2017).

The most prominent establishment challenge appears to be relative gain from food volume procurement. Actors generally gain from purchasing large volumes from suppliers. This is due to margins at retail level being relatively low, as well as product costs forming a large share of total costs (Oslo Economics, 2017). These relative volume gains make it especially challenging for small and recently established actors to acquire beneficial procurement conditions, as they compete with huge retail groups and other large actors with a notably better market position. Another important challenge relates to the vertical integration of established actors, as this structure discourages independent wholesalers (Oslo Economics, 2017). However, digital innovations in the food market avoid at least one establishment challenge applicable to other newcomers, namely physical store locations as access to these are highly competitive.

Despite the aforementioned challenges to newcomers in the Norwegian food distribution industry, actors trying to implement alternative distribution forms, such as online sales and box schemes, seem to have the largest potential impact on traditional food shopping (Oslo Economics, 2017).

# Summary

The Norwegian food sector has experienced a relatively large and stable growth in recent years. The sector has experienced a significant change in terms of competition contraction between actors, as the power concentration has gradually shifted from many to few. This structural change has important implications for newcomers, as these struggle to gain market share from established actors. The traditional food market is characterized by low prices and dominated by three retail groups with multiple retail chains. Together with strict border control affecting import and customs, foreign actors face difficulties in entering the Norwegian food sector. Despite the small market share of online food shopping on the total food market, consumers are becoming increasingly interested in alternative digital food networks – a market primarily focused on niche food products promoting sustainability, ecology, animal welfare, fair trade, and mitigating food waste. Dominating incentives to engage in alternative food networks and online food shopping rather than traditional grocery shopping seem to be related to convenience and saving time and money. Thus, in spite of their contemporary low market share and establishment challenges, digital innovations as alternatives to traditional food distribution systems have optimistic outlooks.

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1. Figures include turnover for all cooperatives and privately owned stores, but excludes turnover for box schemes and online food shopping. [↑](#footnote-ref-1)
2. Larger cities and urban areas in Norway generally have better access to food (e.g., many stores that are typically closer in proximity, more stores open on Sunday’s, and extended opening hours in general) compared to smaller cities and remote areas, although this has only been the case for a short while (i.e., a few years). [↑](#footnote-ref-2)
3. This number is not exhaustive and excludes sales from for example food box schemes (Dagligvarefasiten, 2018). [↑](#footnote-ref-3)