Stockholm School of Economics
MSc in Business and Management
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FROM *STOR STARK* TO *IPA*

MARKET DRIVING THROUGH THE REQUALIFICATION OF BEER IN SWEDEN FROM 1990-2020

Abstract

Research has begun to chart market driving strategies whose effectiveness depends on different types of market conditions. Strategies include the introduction of disruptive offerings or controlling markets through social influence in the absence of new technology. This study introduces a new dimension of market driving: how actors can alter the market conditions themselves by altering the perception of an existing product. The authors apply the concept of requalification to explore the processes by which the qualities of a product and their respective values can be altered. The study further aims to understand how small firms lacking the resources of large incumbents can succeed in driving a market without disruptive innovation, using the market-as-a-system perspective to highlight the role of actors other than the focal firm. The authors conducted 17 in-depth interviews with different types of market actors in the Swedish beer market to explore how actors have contributed to the requalification of beer from 1990 to 2020. The findings demonstrate how, through a combination of market driving and market driven behaviour, market actors can collectively alter the value uncertainty and value complexity of a product market through the processes of material development, social reclassification, objectification of characteristics, and integration.

Keywords: *Market driving, requalification, markets-as-systems, beer*

Authors
Gustav Bergquist, *41418*
Alexia Versteegh, *41416*

Supervisor
Riikka Murto

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1. Introduction

> *"Sweden has the most advanced beer market in the world." – Henok Fentie, Co-Founder of Omnipollo, Swedish craft brewery, 2015* (Mårtensson, 2015, 10th February)

The current impression of Sweden's beer market as one of the world's most progressive stands in stark contrast to that of only 30 years ago, when beer was only ever referred to as a "Stor Stark" – *a large strong*. While today the market is experimental and Swedish breweries create their own takes on India pale ales (IPA), sour beers, and wheat beers, among other styles, the "Stor Stark" was an all-encompassing label for industrially produced lager. The mid-1990s marked the beginning of the "modern beer revolution" in Sweden, when the market experienced a drastic increase in the number of breweries and varieties of beer on offer (Lindberg, 2020, 6th February). The strong expansion made brewing the fastest growing industry by number of businesses in Sweden from 2010 to 2017 (SCB, 2018). How could such a substantial shift in the beer market be accomplished?

Over the past 20 years, researchers have developed the literature on market driving to explore how firms succeed in actively shaping markets, rather than taking the conditions of structure and behaviour as a given. Previous research links the market driving approach to market orientation with successful global enterprises such as IKEA, Apple & Tesla (Humphreys & Carpenter, 2018; Kumar, Scheer & Kotler, 2000). Market driving is associated with high risk as it involves shaping customer preferences rather than dictating the offering of the firm after the existing demand in markets (Kumar et al., 2000). Yet, the reward for firms that succeed in their execution of a market driving strategy is leading roles in their respective markets (Jaworski, Kohli & Sahay, 2000; Kumar et al., 2000). Literature largely focuses on the creation of disruptive offerings as a way to shape customer preferences and drive markets (Kumar et al., 2000; Hills & Sarin, 2003; Hills & Bartkus, 2007; Neuenburg, 2010). However, the ways in which firms can drive markets by other means is less understood.

The rapid growth of the Swedish beer market is attributed to small, so-called craft breweries. Most of today's Swedish craft breweries have fewer than 5 employees and low revenues (SCB, 2018). The craft beer revolution is today considered a global movement (Garavaglia & Swinnen, 2018), the origins of which can be attributed to the 1970s US market (Carroll & Swaminathan, 2000). Many countries have experienced similar development in recent decades, as the demand for local, quality, and niche products has risen (New Nutrition Business, 2018). In Sweden, craft beer has grown its market share from 3 percent in 2013 to 10 percent in 2016, suggesting that craft beer has taken market share from industrially produced lager (Poppels, 2017). Furthermore, from 2010 to 2020, while the average volume of beer consumed per capita in Sweden decreased by 6 percent, the average revenue per capita from beer increased by over 20 percent (Statista, 2020a). Today, consumers are paying more for beer while drinking less. The increase in disposable income that Swedish consumers have enjoyed may increase their purchasing power (Statista, 2020b), but it cannot explain the shift in image that beer has experienced in Sweden since 1990. The Swedish beer market therefore presents an opportunity to expand the understanding of market driving through the investigation of how market actors can drive a market by altering the perception of an existing product category. Moreover, the question arises of how such transformation can be accomplished by small firms, such as craft breweries, lacking substantial resources.

Within economic sociology, consumer preferences are considered the outcome of complex processes of social construction (Rössel & Beckert, 2013; Dubuisson-Quellier, 2013; Karpick, 2010). Callon, Méadel, and Rabeharisoa (2002) use the term qualification to refer to the processes through which actors evaluate and form judgements of goods. Requalification occurs when consumers are disrupted from their routine purchasing patterns and prompted to reconsider their choices (Callon et al., 2002). The qualification process involves all actors in a market system that interact with the good, which is in line with the progressive perspective within marketing research of markets-as-systems, which considers value as co-created by various actors (Vargo, Koskela-Huotari, Baron, Edvardsson, Reynoso & Colurcio, 2017). The development of the Swedish beer market suggests that beer has been requalified as a product. However, the processes through which this has occurred, and the relationships between the actors involved, remains unexplored. Thus, requalification emerges as a potentially resourceful tool for studying a new dimension of market driving, namely how actors can alter product markets without disruptive or radical innovation.

1.1 Purpose and Research Question

The purpose of this thesis is to expand the understanding of market driving as a strategic approach by studying it in a mass-market product context, exploring how market actors have shaped the perception of a product. The findings hence have broader implications for market actors aspiring to drive existing product markets. We examine the case of the contemporary development of the Swedish beer market, applying literature related to market driving combined with theory on the qualification of goods. Utilising the systems-perspective of the market, we analyse the retrospective accounts of different types of actors in the Swedish beer market. Although the beer markets of the Nordic countries are closely related, we have delimited the scope of the study to the Swedish market. The scope is further delimited to the timeframe, which encompasses the recent increase and subsequent slowing down of growth. Our research question is the following:

How have market actors contributed to the requalification of beer in Sweden from 1990 to 2020?

The remaining parts of the thesis are structured as follows: in Chapter 2 we review the literature on market driving and present the synthesising concepts of markets-as-systems and qualification. In Chapter 3 we present the research approach and design, with the data collection focused on the retrospective accounts of market experts. In Chapter 4 we present our empirical findings and analysis through the lens of requalification. In Chapter 5 we relate our findings to the current academic discussion surrounding market driving. Finally, in Chapter 6, we conclude by presenting our theoretical contribution, managerial implications, and avenues for future research.

2. Theoretical Background

2.1 Market Driving

Market driving firms have the strategic ambition to alter the status-quo by actively shaping the markets in which they operate (Jaworski et. al., 2000). Successful market driving generates competitive advantage and exceptional firm performance (Baker & Nenonen, 2020; Humphreys & Carpenter, 2018; Kumar et al., 2000; Schindehutte, Morris & Kocak, 2008; Van Vuuren & Wörgötter, 2013). Market driving firms take, according to Jaworski et al. (2000), active control of the market by consciously altering the market structure and (or) the behaviour of market actors. The alternative strategy to market driving is to be market driven, which implies that firms follow the market development. A firm can both drive markets and be market driven; the approaches are complementary (Jaworski et al., 2000). Empirical data also shows firms can alternate between the approaches (Filier, 2015).

Firms that aspire to implement a market driving strategy must possess certain capabilities and characteristics in order to succeed. Carrillat, Jaramillo and Locander (2004) stress that market driving is a process that starts with transformational leadership. Transformational leadership, which is defined as influencing members of organisations by aligning their goals, values and aspirations to facilitate firm behaviour that is value-generating (Mackenzie, Podsakoff & Rich, 2001), allows firms to mobilise their internal capabilities and use them to define new opportunities for value creation (Carrillat et. al., 2004). Additionally, new entrants within an industry are more likely to successfully execute a market driving strategy. Kumar et al. (2000) argue that established market actors face obstacles in pursuing market driving because: their operations are dictated by strict processes; they are more risk-averse; they are biased against developing radical new offerings; and they often perceive that they have too much invested in status-quo to risk destroying it. Market driving is furthermore a resource intensive approach that requires large investments, which links the strategy to large firms (Dubuisson-Quellier, 2013).

Research is required to further characterise firm capabilities and market conditions that favour market driving. Jaworski and Kohli (2017) note in a follow-up of their original article that the theoretical conceptualisation of market driving is established but that the understanding of the practical process is limited. More research is required to better understand what leaders do to shape their industries and why some firms succeed in shaping whereas others fail to do so despite strong efforts. This includes how a successful execution relates to firm characteristics as well as those of the customer and competitive landscapes (Jaworski & Kohli, 2017). Nenonen, Storbacka and Windahl (2019) add to this view by arguing how market driving capabilities need further operationalisation. Research should also devote attention to how market driving activities are linked among stakeholders in the market system (Nenonen et al., 2019).

Firms can use various means to drive markets. However, Humphreys and Carpenter (2018) argue that literature predominately links the strategy with disruptive innovation. According to previous research, firms use "radical business innovation" (Kumar et al., 2000) and "radical innovation" (Nenonen et. al., 2019) to drive markets. Empirical case studies also show how firms use market driving as a strategic approach in high-tech industries (Hills & Sarin, 2003; Hills & Bartkus, 2007; Neuenburg, 2010). Humphreys and Carpenter (2018) expand the applicability of market driving by showing how winemakers drive the wine market without disruptive or radical innovation. Winemakers use status to pursue market driving, which enables them to control and form the market system and achieve enduring competitive advantage. Market driving winemakers employ the social influence of other market actors in order to drive markets, which adds a systems-element to market driving and expands the set of market driving strategies (Humphreys & Carpenter, 2018).

Humphreys and Carpenter (2018) add empirical insights to some of the calls from Jaworski and Kohli (2017). The outcome of the status game among winemakers explains why some succeed with their market driving attempts whereas others fail. However, the mechanisms of the new approach for market driving require further practical research (Humphreys & Carpenter, 2018). Previous research (Jaworski et al., 2000; Jaworski & Kohli, 2017; Nenonen et al., 2019) also addresses the need for empirical research to establish certain market conditions that favour market driving. Humphreys and Carpenter (2018) add to these calls by concluding that the success of market driving through status and social influence relies on operating within markets characterised by high value complexity and ambiguity, such as the wine market.

Recent market driving research makes valuable contributions to the current understanding of the approach by expanding the analysis from the customer-firm dyad to include other actors in the market system. By expanding the analysis, research finds that a range of market actors impact the execution of a market driving strategy, which adds the interconnections among market actors as a new element of market driving (Humphreys & Carpenter, 2018; Nenonen et al., 2019; Baker & Nenonen, 2020). Baker and Nenonen (2020) and Maciel and Fischer (2020) also show how small firms can drive markets by forming collective alliances and thereby nuance the view of market driving as a resource intensive strategy exclusive for large market actors. Future market driving research can further elaborate the understanding of the approach and capture new dimensions of it by devoting attention to relationships among firms and stakeholders in the market system (Humphreys & Carpenter, 2018; Baker & Nenonen, 2020).

2.1.1 Avenues for Further Exploration of Market Driving

In conclusion, the process of market driving offers several opportunities for further exploratory research. Research calls for more empirical evidence of how actors pursue market driving and demand that research should explore the approach further without disruptive innovation as the tool for achieving success. The investigation of market driving within the Swedish beer market enables us to elaborate the practical understanding of the strategic approach and add further insights of how firms pursue market driving without disruptive innovation.

Markets with high value ambiguity and high value complexity favour market driving through social influence, according to previous research. We will investigate whether market driving firms actively can alter the value ambiguity and value complexity of markets. Our research will thus challenge the assumption that to pursue market driving without disruptive innovation, firms must operate in markets with specific conditions. To capture the complex dynamics of the process we will apply a systems-perspective of markets to include relevant stakeholders other than the firm which will expand the emerging understanding of how relationship among market actors impacts the market driving approach.

2.2 Sensitising Concepts

To study market driving related to a change in value complexity and ambiguity of the Swedish beer market, we use the following two theoretical tools: firstly, the concept of the market as a system; and secondly, the concept of qualification. The systems-view of the market sees value as co-created by different actors in the system, and places emphasis on relationships and processes, which challenges the overly simplistic neoclassical view of value as created by firms and transferred to consumers in exchange (Vargo et al., 2017). Qualification, according to Callon et al. (2002), is how objects obtain their characteristics in the social world, the "processes through which qualities are attributed, stabilised, objectified and arranged." Qualification is informed by the underlying view that the valuation of different objects is a social process (Kjellberg & Mallard, 2013). Quality is not intrinsic to an object, and the object alone does not determine its ease of being objectively measured; rather, it is the result of specific social processes – metrological investments (Callon et al., 2002) – that quality is clear-cut in some areas, but not in others. Thus, the value uncertainty that characterises certain markets more than others emerges from processes of social construction, as opposed to some ambiguity inherent to the objects themselves. The concept of qualification connects to the idea of a market as an entity resulting from processes in which all actors take part. These two process-focused theoretical tools therefore aid in our investigation of how market actors have driven the requalification of beer.

2.2.1 Markets-as-Systems

The theoretical conceptualisation of the systems-view of markets by Vargo et al. (2017) calls for four shifts in perspective among marketing researchers: from the parts to the whole; from objects to relationships; from structures to processes; from measuring to mapping. Each of these four emerging perspectives draws upon the notion that markets must be understood as complex interlinked systems that are functions of the relationships among individual actors that together through interactions form dynamic market systems. Without emphasising these perspectives, research into markets will produce simplified insights (Vargo et al., 2017). The systems perspective is further closely related to the idea that instead of value generation being confined to within the boundaries of the firm, it is co-created by multiple actors within the market system (Tantalo & Priem, 2016; Vargo, Maglio & Akaka, 2008). Contemporary research on market driving employs the progressive view of markets (Humphreys & Carpenter, 2018; Nenonen et al., 2019; Baker & Nenonen, 2020). Researchers into market driving who empirically apply the systems-perspective note that a critical success factor is the firm understanding the value-creating system of which it is part, and the potential for resource integration with other stakeholders (Humphreys & Carpenter, 2018; Nenonen et al., 2019).

We will apply the reasoning by Vargo et al. (2017) and consider the market as a dynamic system that is the result of the relationships among its actors in the investigation of market driving within the Swedish beer market. Experts are important within complex and ambiguous markets as they guide actions of market actors by their opinion (Clauzel, Delacour & Liarte, 2018; Humphreys & Carpenter, 2018; Ali, Lecocq & Visser, 2008; McCoy, 2005). Our investigation is, therefore, similarly to Humphreys and Carpenter (2018), expanded from the customer-firm dyad to include experts, critics, and other influencers outside the value chain of beer in the Swedish market.

2.2.2 Market Driving Through Requalification

Callon et al. (2002) view the qualification of goods as central to the shaping of markets through reciprocal influences between market actors. The authors distinguish between a product, which is treated as a strategic variable and has an open list of possible qualities, and a good, where the qualities are stabilised at a moment of exchange. A product is a process, and a good is defined by its qualities, which makes it tradeable in the market. The qualities of a good are intrinsic, in that they depend on the good itself, as well as material devices such as packaging, design, advertising, and place on the shelf. Qualities are also extrinsic: "not only are the qualities shaped by the device used to test and measure the good (and therefore depend on the choice and characteristics of that device) but their formulation and explanation also generate evaluations and judgements which vary from one agent to the next" (Callon et al., 2002).

Social consensus on a good's characteristics is seldom achieved and there are often competing classification systems. The definition of the characteristics of a good requires "metrological work" that involves "heavy investments in measuring equipment" (Callon et al., 2002). Consequently, both the list of characteristics of a good that are taken into consideration, and the value given to each of the characteristics, are contested. There can be competing classification systems at the same time, as Rössel and Becket (2013) explore in the case of the German wine market. A classification system by its nature favours certain properties of an object at the expense of others. It is therefore in different actors' interests to push certain classification systems over others. Thus, markets are continually reshaped, with multiple versions of the market existing simultaneously and controversies emerging from competing efforts (Kjellberg & Helgesson, 2006). These versions "only compete or need to be reconciled in concrete situations" (Azimont & Araujo, 2007). Dubsuisson-Quellier (2010) argues that in mass consumer markets, "many definitions of product quality are produced throughout the product development and marketing processes" suggesting "there may be no need for a consensual agreement on a product's quality for exchange to take place."

> *"The causes of quality uncertainty are more fundamental. Quality uncertainty is not just an information problem, but rather reflects the elusiveness of collective definitions of quality. Quality is not external to the market process but comes into existence through the social processes of classifying products." (Beckert & Musselin, 2013)*

In some markets, products are more difficult to qualify because objective tests are more difficult to construct. In industries such as art, wine, music, and restaurants, the establishment of quality is ambiguous and complex, as collective definitions of quality are difficult to obtain (Rössel & Beckert, 2013). These industries are aesthetic, which invite people to make their own subjective evaluations based on sensations. When the experience is ambiguous, consumers struggle to make their own evaluations, and may be more directed by social influence (Humphreys & Carpenter, 2018). In markets characterised by high quality uncertainty, the social status of the supplier may be more influential for consumers' evaluations of quality (Rössel & Becket, 2013). Aspers (2009) distinguishes between two ideal types of markets (of which empirical examples exist as a blend of the two in varying degrees): "standard" and "status". Value uncertainty in markets is a result of a lack of knowledge and is lessened by either focusing on the good in question and comparing its qualities to a set of standards, or by focusing on the status of the traders to gain an indication of the value of what is being traded. There is a tipping point where markets become more one than the other. Aspers (2009) says that "status markets can be found where aesthetic judgements are common" and illustrates how the garment industry has shifted from value being focused on a production standard, to fashion. Hence, in markets where aesthetic judgements are more prevailing, market actors look to the status of the seller and buyer to understand the value of the good. They may also be more influenced by high status reviewers and critics (Humphreys & Carpenter, 2018).

Callon et al. (2002) draw upon the concept of distributed cognition (Hutchins, 1995; Mallard, 1996) to explain how consumers perceive and evaluate differences. Consumers are aided by socio-technical devices – various material devices connected to their social context – which help to situate the goods in a socio-cognitive arrangement, arranged in relation to one another by similitude and dissimilitude. They act as signals and references, each element contributing to the consumer's application of judgement. In addition, consumers are linked to their social networks, which influence collective evaluations and the formation of consumers' tastes. Karpick (2010) develops this concept by arguing that people use "calculative judgement devices" to reduce the uncertainty regarding the quality of the goods they buy. These devices are based on personal trust and impersonal trust. Personal trust is through networks of friends and relatives, or trust through someone's good reputation; impersonal trust is based on guides, labels or certificates (Becket & Musselin, 2013). Hence, consumers rely on social and material cues to inform their decision-making by reducing the uncertainty in the quality of the goods they buy.

Qualification is driven from the product supplier's side by the joint need to both *singularise* the good and make it comparable to other goods (Callon et al., 2002). Through *singularisation*, the firm differentiates the good from others to make an argument for why it should be purchased by the consumer. Doing so requires situating the good in relation to other goods to make it comparable. The second competitive force firms engage in is the *attachment* of consumers to their products. Because consumers' preferences are tied into the "apparatus" of distributed cognition, they are both "stable and reconfigurable" (Callon et al., 2002). Consumers are either driven by their routine choices or disrupted to reconsider their choices through requalification. Product markets thus evolve through the joint forces of differentiation in and convergence on qualities, where the qualities on which not only the product but its category are classified are continuously remade in a process of requalification. Attempts at requalification can be focused on the material characteristics of the product, through changes to its content or marketing devices (Fuentes & Fuentes, 2017). Requalification can also involve work in changing the category with which a product is associated (Azimont & Araujo, 2007).

Many actors are involved collectively in the continual process of qualification and requalification, including marketing professionals. "The R&D engineer, the marketing manager, the sales manager, the advertising agent, the salesperson and, finally, the consumer will all, in turn, attribute qualities to the products that are developed, sold, and consumed" (Dubuisson-Quellier, 2010). All agents that are related to the product have the opportunity to treat it as a strategic variable and will be able to affect the continuous qualification and requalification process to their specific intents (Callon et al., 2002). Market actors are able to coordinate their efforts through the socio-cognitive arrangement involving the distributed socio-technical devices. Neither the perception of qualities nor their value can be imposed upon consumers; consumers participate actively in the process and requalification occurs through reciprocal influences (Callon et al., 2002).

Yet, through various socio-technical devices, suppliers and other market actors can shape markets through the classification of goods and the value with which qualities are attributed. Suppliers can integrate qualities with their products connected to market values (Kjellberg & Helgesson, 2010). The consumer must realise the value of these qualities, which the supplier can attempt to communicate through marketing efforts (Fuentes & Fuentes, 2017). Firms must understand demand and the qualities that are valued in order to have control of the process, which corresponds to a market driven approach. However, the uncertainty of consumer preferences can also lead to the emergence of market values as they are defined by market driving companies. Dubuisson-Quellier (2013) argues that in mass consumption markets, leading companies define demand through various marketing devices, setting the value of product features, because of the uncertainty involved in understanding consumer preferences. Dubuisson-Quellier (2013) draws upon White's (1981) notion that because demand is too uncertain and difficult to assess, companies observe their main competitors to understand consumer demand and decide on their strategy. Dubuisson-Quellier (2013) argues that only incumbents with dominant market share can be market driving, because it is too costly for smaller companies. The emergence of market values results from a collective framing process when "an incumbent company succeeds in defining for itself and its competitors what consumers want and which product features meet that demand" (Dubuisson-Quellier, 2013). Hence, market values as well as consumer preferences can be socially constructed by firms.

2.3 Conclusion of Theoretical Framework

We have established that market driving is a burgeoning field that leaves several unexplored avenues for future research. The process of requalification helps to shine the light on how firms can drive markets by altering the perception of product differences and the value of those differences, and how such a process is the result of complex and reciprocal interactions between market actors. Literature on the social construction of qualities and value also highlights how the issue of uncertainty is tackled. To reduce value uncertainty, consumers may rely on comparing the goods to a set of standards, look to experts, guides, or their social network, or look to the status of the sellers and buyers. Socio-technical devices inform the consumers' judgement, which are subject to manipulation by market actors. Our investigation challenges the assumption that the effectiveness of market driving as a strategy is dependent on market conditions that are static, since we explore how market actors can alter the value uncertainty of markets. The systems-view of the market highlights the underexplored role of relationships between market actors and the influence of actors other than the focal firm in market driving.

3. Methodology

3.1 Research Approach

Due to the open-ended nature of our inquiry, we employed a qualitative research strategy with an inductive approach to the relationship between theory and research. The state of prior theory and research is found closer to the former end of the continuum between nascent and mature. Exploratory and hypothesis-testing research has been conducted on market driving. Yet, the conditions under which market driving is effective is uncertain and has been the subject of little study. The specific topic in question, of how market actors have driven the market through a change in the value complexity and ambiguity of a product, is unexplored. Qualitative data are suitable for studying phenomena that are not well understood and are useful for theory generation (Edmondson & McManus, 2007). Qualitative research is further well-suited for allowing insight into complex social processes (Eisenhardt & Graebner, 2007). In response to our open-ended research question, we provide tentative answers as to how and why, suggesting new connections among phenomena.

Our theoretical framework draws upon a constructionist ontology, taking a view of social reality as "a constantly shifting and emergent property of individuals' creation" (Bell, Bryman & Harley, 2019). Hence, we chose a qualitative research strategy as it is most appropriate for illuminating the means by which individuals interpret the social world, and the processes of social construction (Gioia, Corley & Hamilton, 2013). The exploratory nature of our research question warrants an inductive approach, in which we do not test a theory; rather, the data is interpreted for meaning in order to generate theory. The research question was initially expressed less explicitly and was adapted throughout the course of study, becoming subsequently narrowed and refined as new concepts emerged from the data. We used a "planned-systematic" approach to data collection, where we had a fair idea of the data to be collected, but which left room for new leads to be pursued based on the opportunity for learning (Bell et al., 2019).

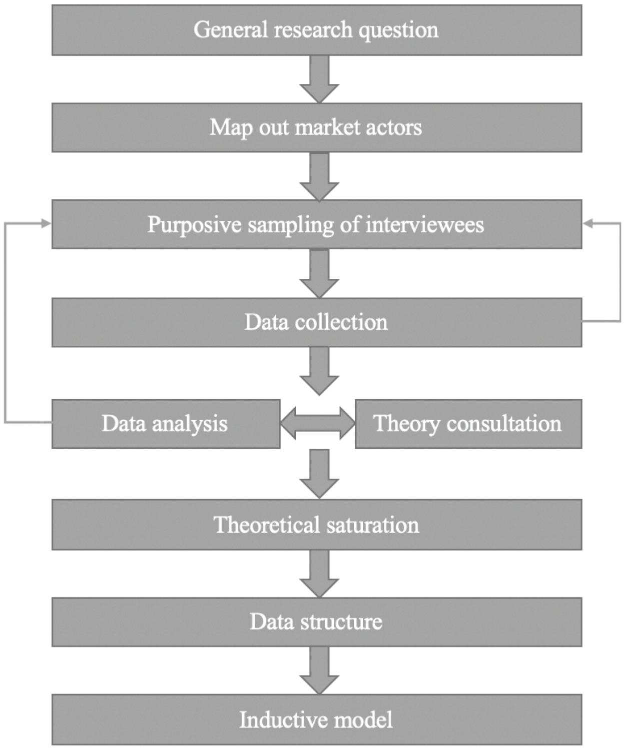
3.2 Case selection

The purpose of the research is to extend the existing theory on market driving by investigating a market system that has experienced a change in value ambiguity and complexity. A single case has the power to richly illuminate a phenomenon (Siggelkow, 2007). As the purpose of the study is to generate theory, not to test it, we theoretically sampled the single market system as the entity of study (Eisenhardt & Graebner, 2007). The Swedish beer market is a suitable case, as there are preliminary indicators such a change has occurred. As described in the Introduction, the Swedish beer market has experienced a drastic change in perception, and the case hence is unusually revelatory (Yin, 1994). The time span for the historical case spans from 1990 to 2020, which captures the change starting from the revival of the interest in craft breweries, through to the slowed growth of the Swedish beer market. The Swedish beer market further has particularly revelatory potential as it is local for the researchers and hence conducive for rich, detailed data collection. It allowed us to utilise contacts and for in-person interviews to be conducted at short notice if an opportunity arose. Multiple-case studies have been argued to be better for theory-building (Yin, 1994). Yet, by exploring an extended case study of multiple actors in the same market system, comparison between accounts is possible, which increases generalisability as only replicated relationships are the focus of analysis (Eisenhardt, 1991). This exploratory case study serves as a valuable preliminary starting point in which themes are mapped out suggesting the mechanisms at hand, which can be explored further in subsequent research.

3.3 Research Design

To answer our research question, we used in-depth semi-structured interviews with expert and influential market actors as our primary data collection method. The retrospective and real-time accounts of actors who experienced the phenomenon allow us to provide rich explanations of the mechanisms at hand (Gioia et al., 2013). Because we adopt a constructionist ontology, the focus is on the interpretations of the Swedish actors to understand how they shape and understand the market. Semi-structured interviews allowed for a flexible approach that allowed for interviewees to elaborate on topics they considered important, yet nonetheless covered the areas we deemed relevant to answer the research question. Semi-structured interviewing further allowed us to keep an open mind about what we need to know about, which is a reflection of the open-ended nature of the research question, "so that concepts and theories can emerge out of the data" (Bell et al., 2019). We used triangulation to strengthen the validity and reliability of our findings by collecting data from secondary sources (Deacon, Bryman & Fenton, 1998). It helped us to uncover conflicting meanings and interpretations and ensured we did not entirely rely on the invasive method of interviewing, in order to provide a more holistic understanding of the market system. We followed the Gioia et al. (2013) methodology, which is inspired by techniques from grounded theory developed by Strauss and Corbin (1998). Data collection, data analysis, and theory-building occurred in parallel throughout the investigation (Gioia et al., 2013; Golden-Biddle & Locke, 1997). An outline of the methodological process is outlined in Figure 1.

Figure 1: Outline of the methodological process

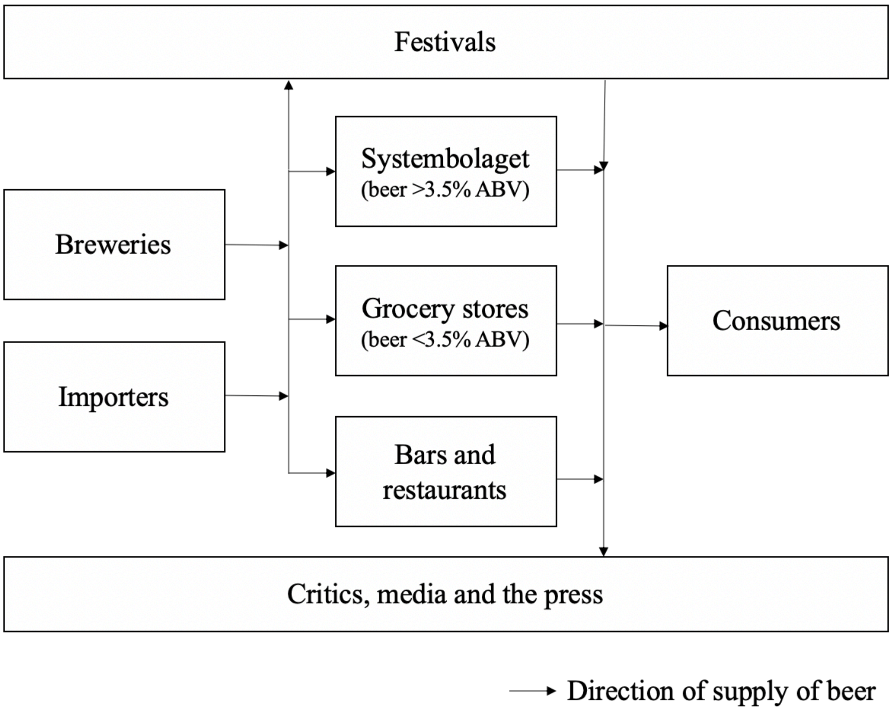


3.4 Data collection

3.4.1 Pre-study

Prior to conducting the interviews, we performed preliminary research in order to map out the Swedish beer market system and identify relevant actors. As well as desktop research, we visited the Uppsala Beer & Whiskey Festival, the Spritmuseum (The Stockholm Spirits Museum), and a beer tasting to learn about the history of beer in Sweden, general trends, and the current market. At the Uppsala Beer & Whiskey Festival we established contact with breweries who were willing to be interviewed. We categorised the actors of the market (see Figure 2), which informed our choice of who to interview as we wanted to have a representative sample with a breadth of perspectives that would inform our findings. We identified the main breweries, retailers, and writers in the press. We compiled a list of potential interviewees categorised by type of market actor. One in-depth interview was conducted in the pre-study, with Erika from Sveriges Bryggerier. This allowed for a front-loading of learning about the context and historical development of the Swedish Beer Market, and to gain a general overview that would together with the theory guide us in creating the interview guide.

Figure 2: The Swedish Beer Market System



3.4.2 Interviews

3.4.2.1 Interview sample

Due to our markets-as-systems perspective, the interview sample consisted of various types of market actors to gain a full understanding of the beer market through their accounts. We followed the suggestion by Eisenhardt and Graenber (2007) and used purposive sampling to select interviewees strategically so they would be relevant to the research question, focusing on highly knowledgeable informants and observers closely involved in the change of the Swedish beer market. For example, we consulted lists and news articles of the most influential beer actors in Sweden (e.g. BeerNews Christmas Calendar, 2019). We also found interviewees referred to us by personal contacts. We supplemented the purposive sampling with snowball sampling (Yin, 2009). All interviewees were asked if they could recommend further people to talk to, which resulted in several relevant leads. This sampling method was particularly useful, as the experts had knowledge concerning actors who had been influential, and they helped us to map out the market actors and establish the credibility of experts. In addition, there are close ties between actors in the market and we managed to interview contacts with whom it otherwise would have been difficult to establish contact. It further allowed more rapid sampling, which was crucial given the time constraint. Lastly, we used theoretical sampling as data was collected, where choice of interviewees was controlled by the emerging theory (Glaser & Strauss, 1967).

From the list created in the pre-study, we systematically reached out to the actors, with a balance between producers, retailers, bars, restaurants, and critics, media and the press. There was a preference for individuals who had been in the industry for 10+ years as we wanted to understand historical development. Ultimately, we spoke to 17 industry experts: 4 producers, 6 retailers, 1 importer, and 6 in the category critics, media and the press (see Table 1).

Table 1: *Interview sample*

Breweries

Date	Company	Name	Position	Gender	Years in Industry	Interview Setting	Length (min)
11/3-2020	Oppigårds	Sylvia Falkeström	Co-Founder	Female	25+	Physical	90
20/3-2020	Gotlands Bryggeri	Johan Spendrup	Former CEO	Male	20+	Physical	90
24/3-2020	Dugges	Mikael Engström	Founder & CEO	Male	15+	Virtual	45
2/4-2020	Nya Carnegiebryggeriet	Christina Körmendi	CEO	Female	20+	Virtual	60

Import, Systembolaget & Retailers

Date	Company	Name	Position	Gender	Years in Industry	Interview Setting	Length (min)
10/3-2020	Systembolaget, Head Quarter	Johan Ahlstedt	Head of Beer Buying	Male	10+	Physical	75
17/3-2020	Berntson Wine & Spirits (import)	Eric Berntson	CEO	Male	20+	Virtual	45
24/3-2020	Bottle Shop ("Folköl" & Non-Alcoholic Beer)	Martin Jämtlid	Co-Founder & CEO	Male	20+	Physical	70
24/3-2020	Bottle Shop ("Folköl" & Non-Alcoholic Beer)	Fredrik Glejpner	Co-Founder & CEO	Male	20+	Physical	70
26/3-2020	Systembolaget, PK-Huset	Ivar Backman	Sommelier	Male	3+	Physical	45
2/4-2020	ICA Järvastaden	Rasmus Samuelsson	Co-owner & Store Manager	Male	5+	Physical	45

Other Influential Market Actors

Date	Company	Name	Position	Gender	Years in Industry	Interview Setting	Length (min)
27/2-2020	Sveriges Bryggerier (industry association)	Erika Lillieström	Head of Communication	Female	10+	Physical	75
6/3-2020	Dagens Nyheter (newspaper)	Alf Tumble	Beer Critic (educated sommelier)	Male	15+	Physical	60
10/3-2020	Beer News (online news)	Ronny Carlsson	Founder & Writer	Male	15+	Physical	75

19/3-2020	Akkurat (bar)	Anders Ström	Head of Bar	Male	20+	Physical	60
19/3-2020	Spritmuseum	Nadja Karlsson	Arranger of Beer Tastings (experience from Systembolaget & Dagens Nyheter)	Female	25+	Virtual	45
24/3-2020	Stockholm Beer & Whiskey Festival	Marianne Wallberg	Founder & CEO	Female	25+	Virtual	75
26/3-2020	Self-Employed	Michel Jamis	Sommelier (experience from restaurant)	Male	25+	Physical	60

3.4.2.2 Interview Design

Each interview was 40-90 minutes long. 10 were conducted face-to-face, and 6 were conducted over online video call. The preferable interview form was face-to-face, as it generates richer information in terms of facial expressions, body language, and tone (Brinkmann, 2013). However, due to geographical limitations and the outbreak of COVID-19, it was not possible for all the interviews (discussed in section: 3.7 Limitations). All but two of the interviews were conducted in Swedish, which was the preferred language of most of the interviewees, in order to facilitate the flow of conversation and reduce the risk of miscommunication and misinterpretation.

For the semi-structures interviews we used a responsive interview style, using main questions, follow-up questions, and probes to allow interviewees to elaborate on their answers, provide examples, and add more depth, to gain richer data (Rubin & Rubin, 2011). An interview guide was created after the pre-study, with fairly specific topics to be covered (see example Interview Guide in Appendix A). To begin, the interviewees were asked if we could digitally record the interviews, and if they would prefer to remain anonymous. All interviewees agreed to be recorded, and none wanted to remain anonymous. We began by giving an overview of our study and explaining the purpose of the interview. We continued by asking broad questions about their background, role in their work, and experience in the beer industry. The subsequent questions covered the following main themes: the development of the beer market; the change in the perception of beer; the influence of different market actors on the beer market, and relationships between market actors. Covering the same areas ensured the data was comparable across market actors in the analysis. The research question to start with was not so specific that it would limit new areas of thought that might arise over the course of the investigation. Open-ended questions allowed the interviewees to elaborate their perspectives based on their interpretations of the questions, creating more breadth of responses (Rubin & Rubin, 2011). Tangential conversations were encouraged, to allow the conversation to focus on what the respondent considered important. The guide was adapted to fit the person and the function, to focus on the areas in which they had more expertise and knowledge.

Within 48 hours each interview was transcribed from the digital recordings. They were transcribed verbatim in their entirety with the exception of small sections deemed irrelevant to the study. The transcripts were checked by each author. This allowed us to become familiar with the data, which facilitated the data analysis process. The transcripts were emailed to the interviewees so they would have the opportunity to comment and request that certain sections not be quoted. The transcriptions were kept in the original language. Where quotes have been used, they have been translated into English. The primary data collection process was finished when theoretical saturation was reached, when interview participants were no longer illuminating the process we were investigating and hardly any new codes or theoretical insights were being generated (Strauss & Corbin, 1998). There were a total number of 167 pages of transcribed interviews.

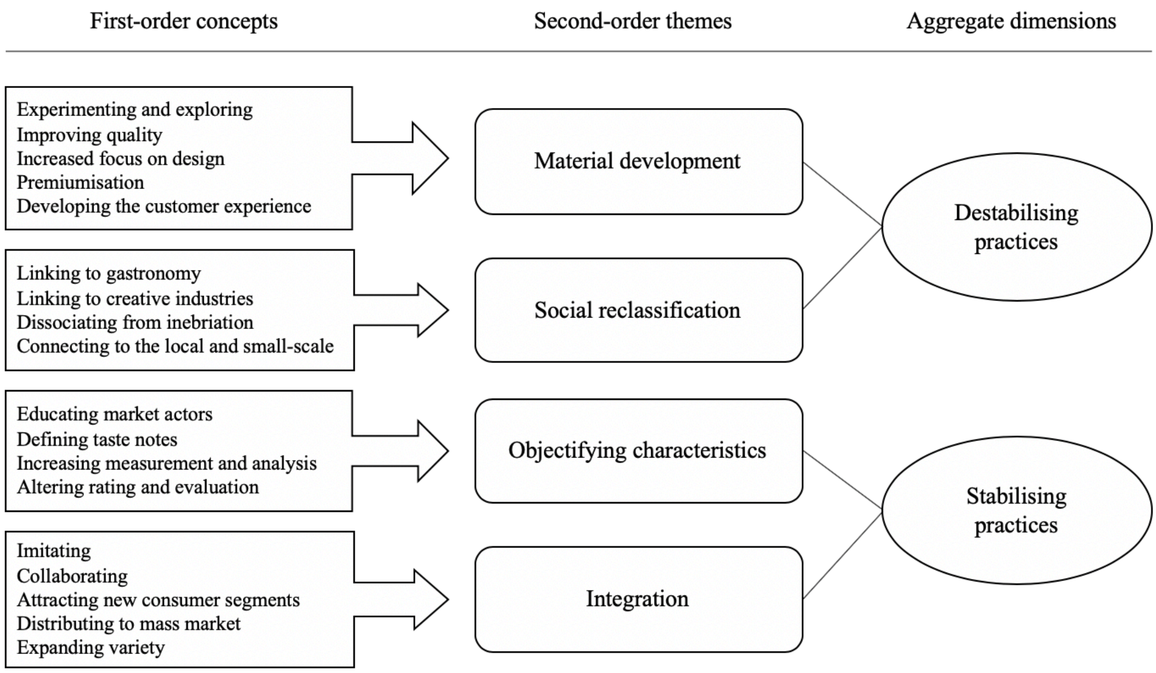
Secondary data was collected through internet and database searches. Systembolaget supplied us with supporting numerical data to illustrate the change in the Swedish beer market.

3.5 Data Analysis

The collection and analysis of data was an iterative process and occurred in parallel, the separating of which is artificial (Gioia et al., 2013; Golden-Biddle & Locke, 1997). We followed the Gioia et al. (2013) methodology, where we first generated first-order concepts from informant-centric codes, then second-order themes through the lens of the theoretical framework. As soon as the interview transcripts were completed, they were read independently by each author. Notes were made as comments in Word. Informant codes, terms and categories were recorded in Excel, as were their corresponding transcript quotes, which allowed for constant comparison (Glaser & Strauss, 1967). Ideas that emerged from the analysis informed the next steps of data collection (Glaser & Strauss, 1967). This included theoretical sampling (Strauss & Corbin, 1998), and asking interviewees more focused questions. Over the course of the data collection we searched for similarities and differences within and across interviews to find connections between the categories, similarly to axial coding (Strauss & Corbin, 1998). The categories, of which over 100 were generated, were discussed together and narrowed down until we reached agreement. The categories were given labels or phrasal descriptors to create first-order concepts (Gioia et al., 2013). We focused on data relating to the research question, which over the course of the study became narrowed to specific ways in which market actors contributed to the requalification of beer.

While we had in the initial stages of the data analysis attempted to consider the data without the influence of existing theory, in the second phase we consulted literature to raise the order of the analysis. We classified the concepts inspired by theory on qualification, creating researcher-centric second-order themes. We then distilled the themes into second-order aggregate dimensions. The data analysis is visualised graphically in the provided data structure (Figure 3). Appendix B and C contain empirical evidence for the first-order concepts. An inductive model was then generated to dynamically represent the relationships between the concepts generated from the data (presented in Chapter 5: Discussion).

Figure 3: Data Structure Based on Gioia et al. (2013) methodology, illustrating how market actors have contributed to the requalification of beer



3.6 Quality of study

To guarantee qualitative rigor, the study adhered to the criteria that Lincoln and Guba (1985) and Guba and Lincoln (1989) propose of credibility, transferability, dependability, and confirmability, which they propose comprise the trustworthiness of a qualitative study.

3.6.1 Credibility

To ensure "congruence between concepts and observations," we carried out the study "according to canons of good practice" (Bell et al., 2019). We digitally recorded the interviews and each researcher checked the transcriptions against the audio. We ensured the validity of individual accounts through respondent validation whereby each interviewee had the opportunity to comment on their transcript and check for errors, which ensured we accurately captured their views and reduced misinterpretation. In addition, investing time in attending beer-related events such as fairs and tastings allowed us to become familiar with the social setting (Korstjens & Moser, 2018). Interview data in the form of retrospective and current accounts present challenges in the form of retrospective sensemaking and impression management (Eisenhardt & Graebner, 2007). Retrospective accounts can be distorted by biases and include inaccuracies and errors, either consciously or unconsciously (Huber & Power, 1985). Thus, we used data triangulation to cross-check our findings by referring to multiple data sources (Deacon et al., 1998). We had diversity in the interview sample by age, gender, type of market actor, and size of company to test for consistency. Gathering accounts from varied informants enabled cross-checking and helped to limit bias. Secondary sources were also consulted to corroborate accounts and check facts. Only data that was corroborated by multiple interviewees or secondary data was included in the analysis.

3.6.2 Transferability

This is a qualitative study focused on an in-depth study of the Swedish beer market system. The chosen case is not an extreme example. We make theoretical inferences within the market driving literature, and many of the concepts and processes are transferable across social settings, which makes our findings relevant for a wider audience (Gioia et al., 2013; Lincoln & Guba, 1985). By providing detailed description of the accounts of actors in the Swedish beer market system and our analysis (Bell et al., 2019), we invite readers to make their own inferences about the transferability to specific settings.

3.6.3 Dependability

As LeCompte and Goetz (1982) argue, it is impossible to "freeze" a social setting, which presents a problem for replicability. For external reliability we have left an audit trail by transparently recording the phases of the research process (Korstjens & Moser, 2018). Records such as interview participants, interview guide, transcripts, and data analysis decisions are accessible. Following the Gioia et al. (2013) methodology allowed us to show explicitly in the data structure how our themes emerged from the data. Our findings are supported by illustrative quotes in the body text, with more "proof" quotes in Appendix C to increase trustworthiness (Pratt, 2008, 2009). For internal reliability we benefited from a combination of individual and collaborative work. The digital recordings were listened to and the transcripts were checked by each author. After reading each transcript, the authors came to individual initial findings before discussing with each other. As Jaworski and Kohli (2017) suggest, we took the "duplication" approach to enhance quality, where in the conceptual stage we started with independent ideation, then joint discussion, to take the best ideas of both authors. If disagreements arose regarding interpretations, the issue was discussed until agreement was reached.

3.6.4 Confirmability

Reflexivity is particularly important for qualitative research (Alvesson, Hardy & Harley, 2008). We had little prior knowledge of the Swedish, or any, beer market. There are no strong theoretical inclinations or personal values that may have swayed the research development in a particular direction. The case was chosen because of its revelatory potential of a particular phenomenon. Yet, we acknowledge our part in the knowledge-creation process, as we have directed the selection, collection, and processing of data, which are not neutral techniques (Mauthner & Doucet, 2003). Hence, we took the time to reflect on and question our explicit and implicit assumptions throughout the duration of the research process. We paid particular attention to how our emotional responses to the interviewees may have shaped our interpretations. As the research progressed, we noticed we developed a positive personal view of the Swedish beer market and its actors, which we were cognisant of in our analysis. Regular meetings with our supervisor and her outside perspective and insights increased our ability to be reflexive when we were in the midst of our research.

3.7 Limitations

We delimited the study to the analysis of the accounts of key market actors who were either influential in the shaping of the market or highly knowledgeable observers. Research has shown consumers can be an important force in market shaping when allied with firms (Maciel & Fischer, 2020). We chose not to interview consumers and instead considered them within the account of actors with whom they have close contact. Several of the interviewees interact with consumers on a daily basis, which was a way to gain insights from an expert's perspective. Given the scope of the study, it would have been difficult to gain a representative understanding by separately interviewing consumers. In addition, we did not interview any organisational informants from advertising agencies. Marketing professionals are an important part of the process of qualification (Callon et al., 2002). One of the interviewees was formerly a marketing manager at Carlsberg and thus offered a marketing perspective, but additional accounts may have offered valuable perspectives to the study.

The outbreak of COVID-19 during our study impacted our data collection. Potential informants were busier than usual and thus difficult to establish contact with, particularly small breweries. Due to social distancing recommendations and the geographical distance of some interviewees, 6 of the interviews were conducted over video conference calls. This method presented some challenges as it was difficult to achieve the same level of fluidity and rapport as face-to-face interviews. Occasionally the Internet connection was disturbed, and there were a small number of instances where a word in the audio recording could not be transcribed due to unintelligibility. Instead of assuming the word these cases were omitted.

4. Findings

The data shows that beer has undergone a requalification process whereby consumers' perception of beer's qualities and the way they value those qualities has changed (Callon et al., 2002). Beer has gone from being a "Stor Stark", where alcohol and price were the important qualities, to a more multi-dimensional product in the eyes of consumers and producers. Our findings suggest that evaluative complexity has increased, and that consumers have navigated in a market where value is increasingly ambiguous. In the following sections we analyse *how* market actors have contributed to the requalification of beer between 1990 and 2020. We demonstrate how visionary beer enthusiasts (Section 4.1) and pioneering craft breweries (Section 4.2) destabilised the qualities associated with beer. Systembolaget (Section 4.3) enabled this process, and a process of commercialisation (Section 4.4) helped to stabilise these requalification attempts through distribution to the broader market.

4.1 The Visionaries: Beer Enthusiasts

Key beer enthusiasts, enacting their vision for the Swedish beer market, have driven the market and contributed to the requalification of beer. The category "beer enthusiasts" encompasses many diverse actors, including critics, pub-owners, sommeliers, brewers, festival-organisers, and hobbyists. The visionaries saw deficiencies in the variety available to consumers and in the general knowledge concerning beer, and set out to educate market actors, thus catalysing the development of beer culture and laying the foundation for future experimentation and growth.

4.1.1 The Beer Awakening

> *"The whole beer culture we have today can be said to have been inspired by what happened in the US in the 80s." – Michel Jamis*

In 1992, Marianne Wallberg started the Stockholm Beer & Whiskey Festival, which was the first event of its kind in Sweden. Drinking fairs and tastings were illegal at the time, but Marianne found a way to obtain a temporary permit and eventually change the law in 2011. "Say something's forbidden, and I'll fix it anyway," she told us. Marianne explained how she was driven to action by the realisation that "there were hardly any different [beer] options," and that "the knowledge of the drink was so incredibly limited, both among the servers and the customers [at the restaurants]." Stockholm Beer & Whiskey Festival was influential for developing an altered beer culture because it was an arena where Swedish brewers could gain visibility, yet also gain inspiration from foreign beer styles.

> *"It's very important that a beer fair has a combination of foreign and domestic beer (...) Swedish breweries have been influenced by foreign beer styles and created their own interpretations that have developed our beer market." – Marianne*

Swedish beer enthusiasts were inspired by the developments seen in beer markets abroad, and imported products served as catalysers for the development of the Swedish beer market. In 1995, Sweden joined the EU, and was no longer allowed to discriminate between products based on the country of origin (Box, 2017). The number of beers offered at Systembolaget exploded, which made beer a more interesting category for consumers. "In this period Sweden probably went from around 30 different beers at Systembolaget, to over 500," according to Nadja Karlsson from Spritmuseum. Yet, even other actors were significant in their import practices, including the bars Oliver Twist and Akkurat. Several interviewees underscored the influence of these bars specialising in beer for the continued development of Swedish beer culture. Marianne Wallberg, founder of Stockholm Beer & Whiskey Festival, described how Oliver Twist and Akkurat were the pubs that "first brought real ale to Sweden." Anders Ström from Akkurat said:

> *"Oliver Twist and Akkurat started 25 years ago and it was at these bars that new things emerged. (...) Beer that started being served at Oliver Twist and Akkurat during that time didn't exist in other parts of the market. Akkurat was like a beer-university, where as a guest you got to taste different beers and styles and develop."*

Educational arenas – pubs, fairs, tastings and other gathering places – were a ground to share a new language concerning beer, integrating the experts' redefinitions with the consumers' as they shaped the product through qualification (Callon et al., 2002). Actors disagreed with how beer was currently being defined in Sweden, instead establishing "new rules for the game" (Callon et al., 2002). These actors objectified characteristics in beer that had previously gone unnoticed, thus destabilising the definition of the category for consumers.

> *"If we go back to before the Swedish beer revolution, then it was just light beer. We are schooled in an alcohol monopoly, so the differences were only linked to the alcohol content and price. It was light beer, medium beer and strong beer." – Michel Jamis*

Before the transformation of the market, price and alcohol content were the qualities in beer most people considered. Beer was equated with a "Stor Stark", a term which was repeated across most of the interviews to demonstrate how beer was treated as one-dimensional, by today's comparison. "There were rarely – if any – questions about taste profile or such things about the beer," according Sylvia Falkeström from Oppigårds brewery. Eric Berntson, an importer, added to this view: "[Consumers] didn't order by brands at all – people just wanted a large beer. Very boring, very uninteresting (…) People were not really proud of Swedish beer." The relatively one-dimensional view of beer in the 1990s has its historical roots. Sweden has long had a charged relationship with alcohol, and alcohol abuse was a major problem in the 19th century (Spritmuseum, 2020). The rising political influence of the Temperance Movement, a social movement against alcohol consumption, strengthened the idea that alcohol consumption required state control in order to limit the negative impact on public health (Box, 2017). The 20th century was characterised by a consolidation phase in the Swedish beer market, initiated by the Swedish government, driven through acquisitions and closures of small breweries (Sandberg, 2010). The transition was also influenced by trends of industrial concentration to increase economies of scale (Box, 2017). Out of the 240 breweries operating across Sweden in 1905, only 20 remained in 1995 (Sveriges Bryggerier, 2020). The "Stor Stark" was hence a product linked to inebriation and low variety, where price and alcohol strength were the main qualities factoring into consumers' purchasing choices.

From the mid-1990s, Sweden entered a learning phase, driven by beer enthusiasts who wanted to elevate the beer on offer and educate consumers. Michel Jamis, a sommelier, described how Stockholm Beer & Whiskey Festival was "from the start a knowledge-driving fair with a focus on teaching visitors more about beer." When Michel took over the responsibility for the educational schools at the festival, he said that he wanted to talk about "what beer is," and pass it on to the guests, because they "didn't know anything beyond a Stor Stark":

> *"I wanted people to understand what they [were drinking], and I also wanted to give them the opportunity to discover new flavours in beer, to dare to explore new beer styles (...) It was also important to me to help create an understanding of how people should serve beer, in what glasses, to what food, to what temperature."*

New qualities were attributed as actors raised awareness of other dimensions of beer such as taste profile, production process, ingredients, and country of origin. Style, for example, emerged as a new classification system rather than alcohol strength. When it concerns experience goods, critics and experts have an important role in shaping consumers' judgement (Durand, Rao & Monin, 2007; Giesler, 2012; Hsu, 2006; Wang, Wezel & Forgues, 2016). Thus, the critics and experts shaped the consumers' perception of the qualities of beer and the value associated with them. Consequently, this developed consumers' evaluative capabilities, shaping the "device" used to "test and measure the good" (Callon et al., 2002). While previously beer was a standard product, the new emphasis on taste introduced qualities where standards of comparison were less clear. The experience of consuming beer became more ambiguous and complex. This suggests parts of the beer market were beginning to be imbued with a more aesthetic element, characteristic of a status market (Aspers, 2009). Communication in media can further affect a product's legitimacy (Humphreys & Latour, 2013). Critics' and journalists' reporting about craft beer educated consumers more broadly, propagating socio-technical devices which employed the new language of beer. The growth of beer organisations and the starting of more beer fairs that spread the knowledge throughout the country further stabilised the re-definitions of beer.

> *"Because we have these beer fairs all over Sweden today, it has also resulted in the knowledge being spread across the country faster and faster. Today it is easier and more accessible to learn about beer." – Marianne Wallberg*

4.1.2 Shifting Associations

Additional practices that have affected the perception of beer included active efforts on the part of beer enthusiasts to strengthen associations with certain industries, whilst weakening some of beer's other associations. Important associations that grew in strength were the link to the food industry and comparisons to wine. Marianne Wallberg from Stockholm Beer & Whiskey Festival remarked how she has been "advocating since 1992 that beer is perfect at dinner parties, and that is something we see has increased significantly." Qualities were attributed to beer that were found in products associated with other social settings, redefining not only the product but the social identity of its consumers. By increasing beer's comparability to gastronomy and the wine industry, beer's status was affected through reference.

> *"Something I do not like is that we see that the beer in some circles has become a bit high-end (...) But beer has definitely stepped out of the living room and into the drawing room. (...) Today you can't go to a nice restaurant without having a beer menu that they are proud of." – Marianne*

Michel Jamis is a sommelier who was particularly influential in linking beer with gastronomy. Michel started off primarily interested in wine-food pairing but became increasingly interested in beer-food pairing as well. Michel systematised the beer-food link in a similar way that he had done with wine, saying that "when [he] started testing beer in the same way that [he] tested wine for food, [he] discovered that it was possible to apply the same pattern." Michel also played with people's preconceptions at his wine and beer tasting dinners:

> *"Before, when I arranged wine dinners, I always used to come in jeans and t-shirt. When I then arranged beer dinners, I came in a suit instead. I wanted to challenge the notions of each drink. I argued during these dinners that beer is fine, and wine is popular (folkligt)."*

The systematisation of the beer-food link was a metrological investment that defined new qualities and lent credibility to beer's association with gastronomy. The proliferation of such objectifications through tastings and media implied the education of yet more people, reinforcing the redefinition of beer. Challenges to the social status of beer further destabilised the social classification of people attached to the good (Callon et al., 2002), expanding the relevance of beer for new consumers and social settings.

While the association with gastronomy grew, visionaries also took active efforts to dissociate other qualities from beer. These were, among others, the association with alcoholism and inebriation.

> *"What we need to get away from is the isolated focus on the health hazards of alcohol. The whole idea of Stockholm Beer & Whiskey Festival is to teach people how to treat the beer according to their own taste, not just drink a 'Stor Stark' just as you do not eat a 'large food'. Tastings are insanely important in order to develop this particular understanding." – Marianne*

Actors such as Marianne Wallberg from Stockholm Beer & Whiskey Festival wanted to fight against beer's affiliation with alcoholism, a reputation that was tied to the "Stor Stark" in that beer was a cheap, accessible "thirst-quencher". The emphasis of certain qualities that were incompatible with this view of beer contributed to its requalification. Actors distanced craft beer from industrially produced lager through the spotlighting of distinctive beer styles and brewers. They also educated people through tastings so they would develop a greater understanding and appreciation of the non-alcohol related aspects of beer. Marianne's focus with Stockholm Beer & Whiskey Festival was that there were "experts behind each counter," and that all the exhibitors had been "trained in responsible alcohol handling." The growth in recent years of the non-alcoholic segment of beer may be in part to these actors who emphasised the importance of having good quality non-alcoholic beer. Sommeliers who attributed gastronomic qualities to beer further contributed to redefining beer as a meal-time drink one can drink purely for the taste, rather than inebriation.

4.1.3 Attracting New Consumers

Associating beer with new social settings and social identities contributed to requalification through social reclassification. Some interviewees told us how there used to be one stereotypical consumer of beer. Michel Jamis, the sommelier, described the difference between the 1990s and today:

> *"Today, a 19-year-old girl can sit down and be the biggest beer drinker (...) There are a lot of people today that you can't see are beer drinkers when compared to the stereotypical bearded man who in the 90s may have been primarily associated with beer (...) There have come so many different types of beer and different styles that you will today find a range of consumers that stretch from the street to the stock exchange CEO."*

Today, interviewees agreed, there is no stereotypical consumer. Beer has attracted a younger generation. "There's a new generation within beer-drinking (...) they are younger and more curious," said Alf Tumble from Dagens Nyheter. Beer has also attracted more women. According to Marianne Wallberg, when Stockholm Beer & Whiskey Festival started in 1992, it was around 10 percent women; today, women comprise almost 40 percent of attendees. Several interviewees were interested in – and found it very positive – that female consumption of beer has increased, although none could say for certain why this has occurred. Yet there is evidence of direct attempts to include women. Marianne described how they reached out to girls by starting a part of the fair called "taste experience," where they "brought wine, champagne and beer as well as experts in all these drinks." Marianne said: "Then the girls started to become interested in beer (...) In the beginning there was a lot of talk about girl beer, but it is something we have come away from today, there is nothing that is girl beer or boy beer, we all differ when it comes to taste preferences." Christina Körmendi from Nya Carnegiebryggeriet speculated that "a simple thing like glassware," as well as the "variety of beer," could have contributed to increased female consumption. She continued:

> *"I mean before you'd have a 'Stor Stark' in a half-litre pint. It's very male, it's not very feminine and it doesn't taste very good to drink from glassware like that. So I think that the craft beer market has also driven better glassware, better explanation of what the beer is, what the taste notes are, and it has become more interesting."*

Developing the experience of drinking beer through, for example, finer glassware, fostered a more considered approach beyond simply the affect. The requalification of beer continued through reciprocal influences as the redefinition of consumers stabilised changes in requalification through positive feedback. For example, as the glassware evolved and more women started consuming beer, it may have attracted yet more women in a representative positive feedback process. It is worth highlighting that although beer became more associated with certain characteristics of fine dining, it was in narrow social settings. Several interviewees emphasised how part of the appeal of beer is its accessibility. Imitating wine has never been the goal, and the entrenched values associated with beer of being democratic and a drink of the people sets it apart. Yet, by drawing upon frameworks from the wine industry, such as food-drink systematisation, taste notes, and presentation, visionaries have lent credibility to the elevation of beer.

4.2 The Pioneers: Swedish Craft Breweries

In 1995, Sweden had 20 breweries (Sveriges Bryggerier, 2020). 25 years later, by the end of 2019, the number had grown to almost 400, mainly due to the founding of craft breweries (SCB, 2020). The craft brewers' have contributed to the requalification process of beer by experimenting with styles, exploring the boundaries of the product, introducing new associations related to beer, and altering the image of the brewer.

4.2.1 The Exploration of Beer

The requalification of beer has been enabled by the growing awareness of different aspects of the product, together with changes to the content of the product itself. The brewers experimented with new styles and explored the boundaries of the product category in the material development process. Callon et al. (2002) describe how suppliers attempt to singularise their goods from competitors in order to satisfy a demand that other products cannot meet. As Swedish craft breweries were exploring new characteristics of beer, they were singularising their products from industrial beer. Sylvia Falkeström, co-founder of Oppigårds, Sweden's largest craft brewery, said international influence was important during the initial phase of the development process for Swedish craft beer: "We were especially inspired by what had happened in the US when we started our brewery." Sylvia explained how Oppigårds had the ambition to increase the variety in the supply of beer:

> *"The starting point for our production was that we wanted to create beer that we liked and that we could not find in the market. This was also a way for us to create our own niche and thereby enabling easier market access."*

Sylvia's reasoning illustrates how Swedish craft breweries consciously developed new types of beers with other characteristics compared to existing alternatives. As the interest in and popularity of craft beer grew, the breweries were able to experiment further within various categories. Mikael Engström, founder of craft brewery Dugges, illustrated how Swedish craft breweries more recently have expanded their sources of inspiration and that the product development now is driven by interpretation of a wide spectrum of beer styles: "We became more and more interested in sour Belgian beers. We went home and developed our interpretation of a Berliner Weisse (...) which became a big success when we launched it."

Ronny Carlsson from Beer News noted how Swedish craft breweries have altered the product boundaries:

> *"Omnipollo is an example of an actor who has been very driven by challenging the definition of beer and I think you should have all the respect for what they do. I don't think everything Omnipollo does is good, but I don't think it hurts to challenge the conception of beer."*

Ronny's example illustrates how the singularisation attempts by the craft breweries have expanded the product boundaries of beer. The traditional classification of beer has been challenged by the craft breweries' progressive vision of the product.

4.2.2 Emphasising Small Scale and Production Processes

The material development by the craft breweries introduced new types of beer in the Swedish market. The breweries have further contributed to the requalification process of beer by actively forming a new narrative surrounding their products that highlights various aspects of the production process and enables new associations to be attached to beer. Rosa, Porac, Runser-Spanjol and Saxon (1999) define product markets as "socially constructed knowledge structures" that are affected by the stories that market actors use as sensemaking devices to form conceptions of these markets. The Swedish beer market was for a long time defined by the story of beer as cheap, one-dimensional, industrial product. The novel narrative formulated by the craft breweries have altered the market stories of beer and enabled the requalification of the product.

Alf Tumble from Dagens Nyheter illustrated how craft breweries have established a new communication of their products: "Storytelling is something that is frequently used by many craft breweries." Alf noted the dimensions that are emphasised by breweries in the communication: "Specific details are described linked to the manufacturing process. It is very similar to how wine is usually presented at a restaurant." The emphasis of elements such as a product's "origin, mode of production and heritage" is a way to offer authenticity to consumers, which has been identified as an effective marketing strategy (Smith Maguire, 2013). Sylvia Falkeström from Oppigårds described how they use storytelling as a tool in the communication with consumers:

> *"On [our] website, we have published descriptions of our products that are based on the beer style and the raw materials and the process of producing the specific beer. Then we also include our thoughts and the background of why we chose to make each particular product, as there is always such a starting point in our development process."*

Ronny Carlsson from BeerNews highlighted how craft breweries have been able to link their products to broader notions in society: "Today it is likely that you have a relationship with and want to support the local craft brewery, the heart ticks a little faster. This willingness is absolutely connected to the entire trend in society with growing interest in local heritage and small-scale quality products.”

The new narrative created by the craft breweries have not only affected the market stories of beer but also attached new values to the product. Kjellberg and Helgesson (2010) describe how market actors can actively attempt to incorporate new values related to their offerings, which contributes to the formation of market values. For the attempts to succeed, firms must be able to engage other market actors with these incorporated values (Kjellberg & Helgesson, 2010). Craft breweries have been able to successfully add local context and careful production as new values for craft beer since they have been able to engage other actors in the market system, as illustrated by Ronny. The incorporated values have challenged the traditional conception of beer as an industrial product and altered the socio-cognitive arrangement among consumers.

4.2.3 Creative Associations

The requalification of beer in the Swedish market is also related to individuals that founded certain craft breweries. Such individuals have introduced new associations of craft beer by connecting the product to their backgrounds from creative industries. The beer produced by these brewers is integrated with aesthetic qualities that are valued by emerging groups of beer consumers who identify themselves with the creative associations. Consumers can use products as symbolic resources to construct their identities (Fuentes, 2014). The added creative dimension of beer has expanded the set of symbolic qualities for the product, which has generated interest among new groups of consumers. This was exemplified by Ronny Carlsson from BeerNews:

> *“It is clear that [the creative breweries] can have a different impact on a certain audience compared to many traditional breweries. When Daniel's (former drummer in the band In-Flames) brewery launched their beer, it was long-haired hard rockers who queued and bought several boxes.”*

The label design of beer has also emerged as a marketing device to signal aesthetic qualities of the products. The product label contributes to the creation of a product’s “material-semiotic composition” (Dubuisson-Quellier, 2010). Packaging as a marketing device is an important tool for requalification as it affects consumers’ socio-cognitive arrangements in the way they situate different products in relation to one another (Fuentes & Fuentes, 2017). The label design has proved to be a powerful tool among craft breweries to distinguish their products from industrial beer and form a separate identity, as described by Ronny:

> *“Karl Grandin’s (co-founder of Omnipollo and background as an artist) expression (as he designs labels or cans) has broadened how a beer can be presented. Omnipollo really stood out when they came, both with the contents of the bottles but also that you knew immediately that it was their beer you had in front of you.”*

Alf Tumble from Dagens Nyheter further noted how aesthetic label design affects the buying pattern of beer: “Today I would say that it is much more fun to go and look at the beer shelf compared to walking among the wines at Systembolaget. There are so many different cans that come with many nice designs, you really get the urge to pick one of each.” Rasmus Samuelsson from ICA Järvastaden confirmed that design today is considered a hygiene factor:

> *“There are breweries that make great beer but that do not keep high enough standard with their label design. As a result, the beer does not sell, so the label is very important, especially for the first purchase.”*

Figure 4: *Beers from Stockholm Brewing Co. (left) and Brewski (right) (Sources: www.stockholmbrewing.com; @1001birre, Instagram). Retrieved 9 May 2020.*

Figure 5: *A selection of beers from Omnipollo (Source: www.omnipollo.com). Retrieved 9 May 2020.*

The creative brewers have, in addition to introducing aesthetic elements to beer, created new forums for interacting with their audience by starting separate festivals and events. Christina Körmendi from Nya Carnegiebryggeriet described how these events have altered the beer community: “The coolest brands were not there anymore [at Stockholm Beer & Whiskey Festival]. They tend to go to much smaller, niche, more hip festivals. Often these places are for invitationals only. You have to be invited to go there and promote and show your beers.” Rinallo and Golfetto (2006) describe how leading market actors collectively use exhibitions for representational practices that enable these actors to control the market development. The new types of beer festivals can be considered to fulfil this function as the festivals enable the invited breweries to position themselves as trend setters, letting them control the development of the beer market.

The leading role of certain breweries in the development of beer in Sweden has awarded them with status in the market. Erika Lillieström from Sveriges Bryggerier noted how these categories of brewers “almost become like celebrities in the beer world.” Ronny Carlsson from BeerNews added to this view by arguing how well-recognised brewers gain the most attraction at beer-fairs and other events: “At international beer parties there is always a queue for [their] tents and they are always the breweries that have the most visitors.” The behaviour noted by Erika and Ronny indicates that customers increasingly may be looking to the status of the brewers to determine the value of the beer, rather than assessing value by comparing the product to an established set of standards. Aspers (2009) suggests that status markets are signified by subjective qualities that are hard for consumers to evaluate objectively. To use the status of a producer as a judgment device to determine the value of the product is a way for consumers to navigate in ambiguous market settings, since these markets lack stable criteria for determining quality (Rössel & Beckert, 2013). The consumer behaviour described by Erika and Ronny implies that the Swedish beer market has increasingly taken on status market characteristics.

4.2.4 Premiumisation

The exploration of new beer styles gave rise to more unconventional methods of production and increased cost of raw materials for the craft breweries. Craft breweries also have smaller batch sizes reducing the economies of scale in the production. These factors have resulted in higher prices for beer and produced a premiumisation of the beer market. The expanded price-range of beer in the Swedish beer market, together with consumers' willingness to pay increased prices, indicates that the classification systems that consumers use as judgment-devices for valuation have been modified. Sylvia Falkeström from Oppigårds exemplified how they have been able to justify higher prices for their beer with a recent product launch: “In the February [2020] release at Systembolaget we had a stout that was over SEK 60 per [33cl] bottle, which is among the most expensive we put out.” Despite the price, the product had a successful launch: “We got a very positive response from the market and we have basically sold all bottles, but it is important to note that this beer is niche and targets a specific group of consumers.” Mikael Engström from Dugges expressed similar sentiments to Sylvia as he explained his view of the production process:

> *“We have always said that when we want to make a new type of beer, it does not matter what it costs to produce it. We charge so that we cover our costs, and of course you*

have to make a profit to run the business as well. But the cost when we develop a new recipe – we completely ignore it."

Price is a measure that cannot capture all dimensions of value (Kjellberg & Mallard, 2013). Yet, the increased price for beer signals a new status for the product and also nuances the classification of beer from "Stor Stark" to more diverse categories. The increased price of beer also impacts the socio-cognitive arrangement by consumers as it makes beer more similar to other status markets such as wine, with high price discrepancies among products. Ronny Carlsson from BeerNews described how the wider price spectrum has impacted the reasoning among beer consumers: "If a specific beer is expensive and difficult to obtain, then that beer is also considered very good." Ronny further argued how expensive beer can reflect status for the consumer:

"For example, if you go to OmniPollos Hatt (restaurant in Stockholm) you know that it is very good beer but also at a more expensive price, but if you sit there you are one in the beer gang. If you instead walk 30 meters away and drink at a regular pub, it does not have the same craft beer status at all (...) Today beer to a certain extent functions as a signaller of identity in the same way that clothing from a certain brand can do for people."

Ronny's reasoning strengthens the argument that beer today can serve as a signalling device for personal characteristics of the consumer. The classification of beer among consumers can therefore be argued to have become more advanced, as certain beer styles signal certain characteristics. The altered classification of beer implies that consumers today consider more complex qualities in relation to beer as the product increasingly serves as a signal device for their personality.

4.2.5 Collegial Brewers

We were told multiple times how craft breweries have been able to develop as a result of their generosity towards each other in terms of knowledge-sharing. The increased knowledge-level has both resulted in the creation of new types of beers, as well as in the drastic rise of the number of craft breweries. Ronny Carlsson from BeerNews told us how he "doesn't think there is a single craft brewery in Gothenburg that has started over the recent years that hasn't first visited Dugges in order to learn the craft." Sylvia Falkeström from Oppigårds voiced their view on collaborations with other breweries: "The motive [for a collaboration] is that you have a relationship with the other party which is a bit deeper (…) we have probably never thought that 'this will be commercial' when we start a collaboration." Mikael Engström from Dugges explained why he thinks it is important to collaborate:

"I decided that if I start a brewery myself, then I'll treat others the same way [Nynäshamn] treated me and pass on that karma. So I think I've probably had 50 breweries with me from around the country. It has been my way of trying to contribute to development. I think it works this way: 20 breweries are not enough to bring a change. If you are to succeed in influencing the market, you have to invade Sweden."

The craft breweries have shared the common goal to explore and alter the product. The supply side contributes to the requalification process by the trial and error phase in the production, as suppliers attempt to understand what qualities are demanded by the market (Callon et al., 2002). The exploration of the emerging demand for new qualities of beer has been accelerated by the number of breweries taking part in product development. The willingness to share knowledge and collaborate in the production process has spread insights generated during tests and experiments with beer, which has fostered the material development by the craft breweries and resulted in new standards for the product. The collective action of the craft breweries has also resulted in the requalification attempt of beer being spread at a faster pace to the market system.

4.3 The Enabler: Systembolaget

In addition to the visionaries and the pioneering Swedish craft breweries, Systembolaget has played an important role in the requalification process of beer. Existing market structures can serve both as a resource and as a constraint for requalification attempts in markets (Azimont & Araujo, 2007). Since Systembolaget possesses a monopoly for selling beverages stronger than 3.5 percent alcohol by volume, the company has significant control over the market structure for beer in Sweden. Systembolaget enabled the requalification of beer by adopting a progressive view in the curation of its assortment. The emerging classification of beer as a product with gastronomic and aesthetic qualities has been spread further by the company through the arrangement of beer tastings for consumers and the internal education of its employees.

4.3.1 Boosting Development

Systembolaget's motives are different to many retailers that operate in industries with competition and are linked to its monopoly. Systembolaget aspires to care for, inspire, and provide knowledge for its customers. The company operates without any interest in profit (Systembolaget, 2020). Erika Lillieström from Sveriges Bryggerier noted how these values have contributed to the development of beer: "I believe Systembolaget has had a certain impact on this brewery boom. Their conscious work with taste profiles and styles has helped to push the development." Johan Ahlstedt, the head of beer buying at Systembolaget, explained how the ambition of Systembolaget is to build an assortment that appeals to a wide spectrum of customers:

> *"Our role is to provide products that target the entire population. So roughly my job, and thus also the function of Systembolaget, is to provide products for everyone. Not simply for the nerdiest and the most knowledgeable, nor solely for the customer who is looking for the cheapest."*

As the interest in craft beer grew, Systembolaget responded by introducing the TSLS (Temporary, Small-scale, Local) assortment in 2014. Johan explained how TSLS has facilitated craft breweries' access to Systembolaget, through providing access to the 10 Systembolaget stores closest to the breweries' production sites.

> *"The TSLS assortment is where the vast majority of new producers today will introduce their products, without having to compete with other beers in, for example, a blind tasting, which is an example of what is required to be included in the regular assortment (...) We have thus offered an easy way into the market for small producers." – Johan Ahlstedt*

TSLS has served as a catalyst for increasing the supply of beer. The assortment has contributed to the drastic increase in number of articles, segments, and price listings at Systembolaget (see Appendix D). Between 2005 and 2020, the number of beers offered at Systembolaget increased from 314 to 1893, including articles from local breweries in the TSLS assortment (Systembolaget Analysis Department, 2020). It is worth noting, however, that the majority of the craft beers reach fewer customers as they are for the most part distributed to the stores closest to the breweries, as explained by Johan. Christina Körmendi from Nya Carnegiebryggeriet offered her opinion on how it was possible for Systembolaget to establish the new assortment: "They don't care about the tail. They want diversity for the consumers." Christina continued by highlighting the importance of Systembolaget for breweries: "Beer fairs and festivals are very, very important in order to market products towards the influential beer makers and beer geeks. But these festivals will never give you the big volumes. For the volumes you have to get access into Systembolaget." Ivar Backman, a sommelier and tasting room employee at Systembolaget, thought Systembolaget's developed assortment may to some extent be self-serving to preserve the monopoly:

> *"I think that the release of TSLS at Systembolaget is just a consequence of the democratisation of the beer industry. There are so many people making it now. It's almost impossible for Systembolaget to have the role of having a monopoly on beer (...) not to be able to sell those types of beer. People are demanding those types of things."*

Ivar's and Johan's reasoning illustrates how the progression of Systembolaget's beer assortment has been impacted by an altered demand among consumers. Azimont and Araujo (2007) describe how attached consumers accept the status-quo in markets whereas detached consumers demand change. The customer demand for an improved assortment of beer therefore serves as an indication of how Swedish consumers increasingly became detached from industrial beer and its qualities. The call for an altered assortment indicates that consumers became attached to new qualities in beer and thereby rearranged the conception of the qualities of the product.

4.3.2 Spreading Knowledge

Systembolaget has also enabled a more fine-scaled classification of beer through the education of its employees and consumers. Beer tastings are frequently arranged by the company which help participants explore new aspects of beer. Nadja Karlsson, who worked at Systembolaget during the 1990s and early 2000s, described how she trained employees and consumers at Systembolaget:

> *"During [the 1990s] and even the early years of the 2000s, a lot of focus was on educating people about beer and trying to convey the knowledge that lay behind the products. At Systembolaget we had long had only wine courses, but around the turn of the millennium we also started offering beer courses. During this period, I also began to work on internal training of the staff at Systembolaget."*

The education of employees and customers by Systembolaget has been an important feature of the requalification of beer in Sweden. By educating employees about new qualities of beer, Systembolaget enabled these employees to further spread a new classification of the product when interacting with consumers. Furthermore, Systembolaget's website serves as a communication platform with a wealth of beer related information for the public. The association to gastronomy and the knowledge about previously unnoticed qualities of the product, such as taste profile, has been spread to the mass market by Systembolaget.

4.4 The Commercialisation

The craft beer revolution can be said to have taken off properly in Sweden around 2010. "All other beer then became unattractive; it was only craft beer that mattered," said Johan Spendrup. Although the small breweries have credit for driving the initial requalification process of beer, the large breweries have also had an important role in commercialising craft beer. They helped make craft beer appeal to broader consumer segments and make it mainstream.

4.4.1 Riding the Craft Beer Wave

Incumbent breweries in Sweden, such as Spendrups and Carlsberg, were not idle when the craft beer movement gained pace. As Alf Tumble from Dagens Nyheter said, "The big ones have had to adapt to the development that started in the early 2000s by paying attention to what is happening. I don't think there is anyone today who only wants Spendrups in their tavern, you want to add something else." One strategy these large companies have employed is to start up their own microbreweries. As Erika Lillieström from Sveriges Bryggerier described: "Spendrups has Gotland's Bryggerier. Carlsberg has Nya Carnegiebryggeriet. Åbro has a microbrewery in Vimmerby. And they can also ride on the craft wave."

Christina Körmendi from Nya Carnegiebryggeriet told us how the brewery started in 2014 as a joint venture between Carlsberg and Brooklyn Breweries. She described how even though normal lager is "90 percent of the total volume," and "craft beer is approximately 10 percent," "craft beer has a very interesting value proposition, because they are premium beers. They are expensive to brew, but the customers and consumers pay a lot for them." Christina continued, "Carlsberg could not launch a microbrewery themselves because firstly, the credibility was not really there, and secondly, the know-how wasn't there to really produce craft beer in a credible way." Starting their own microbreweries not only gave the large companies the advantage of "being able to sell beer under another brand, another brewer's name," but also allowed them to "start brewing smaller batches purely operationally," according to Erika Lillieström. This allows for greater experimentation and agility when it comes to reacting to new trends.

> *"Normal big breweries have lead times of up to one year before they can do new things, whereas we have 4-5 weeks (...) We are very free to operate the way we want."*
> *– Christina*

With a commercial strategy in mind, the large brewing companies adopted the values of craft brewing and embraced more creative freedom. By experimenting with new varieties of beer, they joined in exploring the definition of beer and its qualities. By retaining high price points from more expensive raw materials and production processes, it further demonstrated beer could be a premium product. The new narrative established by the pioneering craft breweries of connecting the product to local heritage, the production process, and the vision, was also picked up by the large breweries as they distinguished their craft beer by opening up the brewery under a new brand. Beyond opening up smaller craft breweries, the big companies embraced a narrative of provenance and authenticity with other products in their portfolios which marked a distancing from "big brands". Eric Berntson, an importer, told us how Spendrups removed their name from the marketplace entirely, and "all the beers are sort of in disguise, as local groovy brands called all sorts of names." Eric continued:

> *"Spendrups have launched not only micro-like products, but have taken up local interest by Mariestad, which is their biggest hit in the past 10 years. It's an old brewery that closed down 30-40 years ago. They just use the name and they create a story about Mariestad, the beautiful little city by the lake, but there hasn't been a brewery there for 40 years."*

By channelling the voices of small craft breweries and the local, small-scale, large breweries used discursive devices to shape the ongoing narrative and create the impression that even industrially produced lager is local. Hence the large breweries accepted the ways beer was being redefined, and their commercial activity contributed to the requalification of beer on a broader level in the market.

4.4.2 Entering the Restaurant

Opening up small craft breweries gave the large breweries the 'best of both worlds', as they could be more experimental and agile, yet also take advantage of their resources and distribution network. Craft beer such as IPA went from being small-scale to being sold on tap at restaurants, which meant that the range of beer styles known to the average consumer broadened. As Erika Lillieström from Sveriges Bryggerier said: "The difference is that in the past you did not know that there is this range in beer (...) What is considered well-known today, a classic, has broadened." Therefore, through distribution to the mass market, the large breweries contributed to reclassification of the product on a broader scale. The introduction of new types of beer in restaurants was a critical step in the requalification process of beer. Christina Körmendi from Nya Carnegiebryggeriet emphasised how brand-building in restaurants is essential, as it is where "consumers experience a brand." The large breweries had exclusive contracts with bars and restaurants, which made it difficult for small craft breweries to enter the scene through those sales channels. Nya Carnegiebryggeriet was able to "leverage Carlsberg's established relationships with restaurants, which is a very big difference," according to Christina.

> *“When these breweries started making their own IPA and selling on tap, then suddenly there was IPA at every restaurant that had Spendrups as their supplier (...) The beer has managed to go from small-scale to exploding, and it is very much thanks to the fact that the large breweries have had to make beer in new ways in order to compete and survive.” – Alf Tumble*

Changes were also driven in the consumer experience. By focusing on taste and presentation large breweries used their resources and network to elevate beer and emphasise new dimensions. Christina said: “We [provide] guided-tours with beer tasting (…) We also have a gastropub that we are running as a marketing and a restaurant for our beer basically, that’s the key aim.” As well as having gastropubs as marketing houses and tastings with consumers, which strengthens associations with fine-dining and emphasises the taste notes of beer, brewers have changed the consumer experience in other ways. Johan Spendrup, former CEO of Gotlands Bryggeri, described how they actively worked together with the pubs and restaurants that sold their beer in order to deliver a new type of experience for the consumer:

> *“We explained our strategy – that the presentation must be perfect; the foam crown must be there; and the experience must be premium, the entire way until the beer is served.”*

The packaging, setting and salesperson all comprise the characteristics of a good that are involved in its qualification (Callon et al., 2002). By directing the people responsible for the customer experience in restaurants, actors introduced socio-technical devices that created positive evaluations of beer. Johan said that he was inspired by the wine industry – that it was the “narrative that [they] tried to embrace” – in trying to differentiate themselves in the same way a “premium wine [is compared] to a bag-in-box.” Johan continued by describing how the perception of beer began to alter: “The public began to change their view of beer from a kind of bulk product to instead see it as a taste experience.” The category of beer suddenly became a focus of attention in restaurants, characterised by novelty, variation, and a more premium customer experience. Thus, the large breweries strengthened associations that were being made to gastronomy and fine dining.

4.4.3 Bridging the Beer Nerds and the Mainstream

In the same way that the visionaries and pioneers worked to educate consumers and inspire them to explore new styles, the large breweries also worked to make craft beer appeal to a wider customer group. They have made craft beer more accessible in terms of taste. They bridged the beer nerds, the most determined and knowledgeable consumers, and the mainstream. Christina Körmendi from Nya Carnegiebryggeriet explained their target group:

> *“If you look at the consumer pyramid, at the top of the pyramid are the real beer geeks, and then you have the influencers, and the ones who are following the influencers, and then you have the mainstreamers. I wouldn’t say we target the absolute beer geeks, but we do target the people who are really, really interested in beer – accessible beer.”*

The larger breweries have a more commercial focus. In some cases, they have lowered prices. Ronny Carlsson from BeerNews gave an example: "Brutal Brewing, which is owned by Spendrups, has a beer called A Ship Full of IPA that sells for 14.90 instead of 39.90, right when it was launched, it was just 'pang', and it was at the top of the mass sales lists."

> *"We constantly had to check how far we went, we couldn't just make extreme beers that only appealed to beer nerds, but we had to be different but still manage to be commercial. We did not become any favourites of the beer geeks, on the other hand it was not our idea, we were looking to build value for our customers." – Johan Spendrup*

The commercial forces of the large breweries have contributed to the requalification of beer on a broader scale. The pioneering craft breweries were supplying highly differentiated niche products (Dubuisson-Quellier, 2013), which was redefining bee
r on the fringes of the market. Yet for most of the population it was inaccessible, perhaps because the comparability to mass market beer was too weak, which failed to attach many consumers. The large breweries met a latent need for more interesting beer products among the broader population. Suppliers cannot know for certain what qualities are valued in advance, but progressively learn through trial and error, which concerns both the materiality of the good or its presentation (Callon et al., 2002). For example, by toning down bitter hops flavours, the barrier to experimentation among consumers was lowered, as it was closer to their existing taste preferences. Requalification occurred in the mass market, disrupting people from their existing purchasing patterns and contributing to new evaluations (Callon et al., 2002).

4.4.4 Quality

The large increase in the number of Swedish craft breweries in the 2010s greatly increased the supply. Many interviewees pointed to the toughened competition in recent years as the market has matured. Craft breweries could no longer ride the wave of easy growth of the craft beer revolution. It no longer became enough to brew an IPA to singularise their products. It has already been mentioned that design has become increasingly important for the craft breweries to differentiate themselves amidst the crowd. Another aspect that became a hygiene factor was quality. Interviewees were in agreement that quality was essentially the "absence of defects", as explained by Anders Ström from Akkurat. Previously, craft brewers could hide defects behind high alcohol levels and hops. As Erika Lillieström from Sveriges Bryggerier said: "You should know that the most difficult beer to make is a lager, because you can't hide the flavours (...) You make a bad IPA? Well just add some more hops then." Due to the increasing knowledge among both consumers and brewers, and attention to taste notes and the brewing process, brewers were forced to measure obsessively to prevent contaminations in their breweries. Mikael Engström of Dugges recounted:

> *"I learned a lot then, that's the most important thing of all: cleanliness, cleanliness, cleanliness. Measuring and analysing products all the time. The craft breweries have a reputation for being of inferior quality than the large breweries (...) The [large breweries] can brew beer, they have been doing it for a long time. Today, I [have*

employed] a microbiologist, who is responsible for quality. So we're really trying to keep track of that."

The attention paid to ensuring quality was a metrological investment that contributed to the recognition of new qualities and the classification of beer. It demonstrates an objectification of characteristics that previously were less acknowledged among the craft brewers, namely microbial and chemical composition that would result in certain defects. Competition and increasingly demanding consumers meant that brewers collectively raised the standard of beer, by being guided by market intelligence. This made quality emerge as an important quality within craft beer, not only within the mature lager segment.

"For a while, the hip-factor over-weighed the quality-factor, and then I personally felt that 'now something very wrong is going on here'. Also, it wasn't long before consumers realised that it's not the hip-factor we drink beer for, but it's for the taste and the quality. As a result, there was a clear shift that still applies – if you cannot deliver the quality you need, you will not be able to stay in the market for long." – Johan Spendrup

Metrological work has been carried out on the product in other ways. While attempts at determining quality have been increasingly carried out on the supplier's side through measurement and analysis in product development, work on objectifying quality has also been done in the market on the demand side. Interviewees noted how the evaluation systems for beer among critics and experts have developed over the years to become more systematic. Yet the more profound development has occurred in the democratisation of beer evaluations online. Several interviewees brought up how the smartphone app Untappd has transformed the market. On Untappd, ratings are calculated by averaging consumers' scores of the beer (Untappd, 2020). Consumers 'check-in' with a picture of the beer, their rating out of 5, and optional comments. Anders Ström from Akkurat told us how apps and websites such as Untappd have fuelled the demand for novel beers:

"For some guests it's just about [the beer] being a novelty and that they get to drink it early on, which shows they're in the game. They can compare on Untappd and discuss the beer there. It's a bit like bird watching – that you want to tick off as many as possible – it becomes a bit of a competition to show that you've drunk as many as possible."

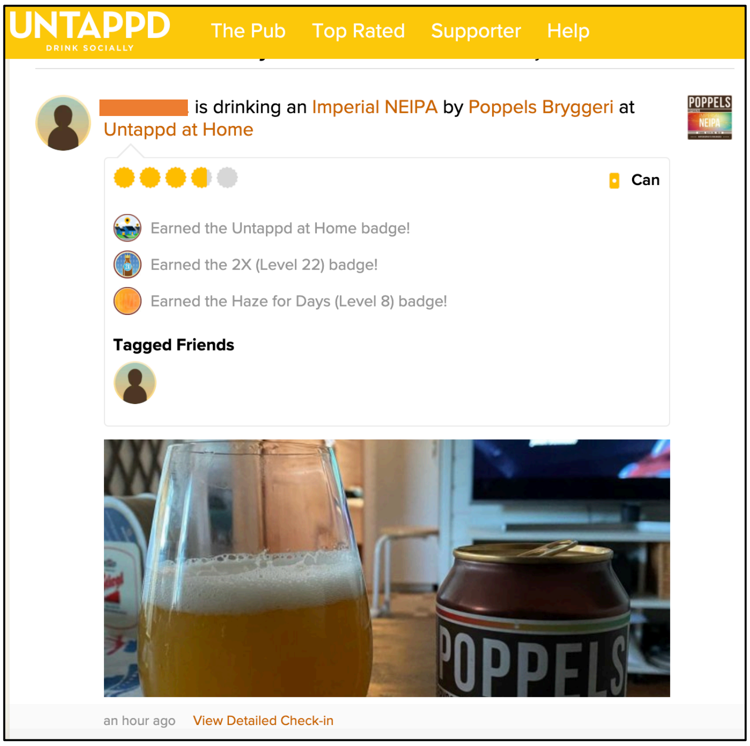


Figure 6*: Screenshot from Untappd showing user 'check-in' with a beer from Poppels brewery (Source: www.untappd.com). Retrieved 9 May 2020*

When consumers purchase a new beer, they can publish it to their personal rating page. Whereas bars like Akkurat attract a spectrum of guests, some bars are positioned as trendier, where the entire point is about drinking the newest releases within the beer market. Knowledge functions as cultural capital (Bourdieu, 1986). Showing they are with the trends lends the consumers status. Ronny Carlsson from BeerNews described how there is a "status ladder": "If you make the world's best lager beer, it will not receive the same rating as the world's best Imperial Stout, it is not the same status." Espeland and Sauder (2007) use the term reactivity to refer to the concept that people "change their behaviour in reaction to being evaluated, observed, or measured." This presents the socially constructive nature of beer ratings in a clear light. If consumers desire to attain status, they should rate beers that have higher status more highly, as it will reflect their knowledge and impact the way they are perceived in their social network. This process of reciprocal influences between consumers and producers has contributed to the requalification of beer through novelty becoming a highly valued feature.

4.4.5 The Symbiosis of Large and Small

Although large breweries have driven change on a large scale, the interview data suggests that they are followers in the market, and that small breweries have driven the market. Both Christina and Johan, from Carlsberg's Nya Carnegiebryggeriet and Spendrups' Gotland's Bryggeri respectively, gave credit to the small microbreweries. Johan said: "The development initiated by the smaller breweries has had an impact throughout the industry and definitely affects the largest breweries as well (...) Many major brewers have the impression that craft brewers are contributing to a general increase in the market regarding the interest in beer."

Johan gave special credit when it came to redefining beer by linking it to fine dining: "Beer has long had a hard time establishing itself in fine dining. It has had a kind of bulk product aura. Through the smaller breweries, beer has started to be redefined, and this can be seen in the new interest that has arisen for beer in the restaurant and culinary scene." Erika Lillieström from Sveriges Bryggerier agreed, saying: "The image of the brewery industry and the image of beer would not have been where it is today without the microbreweries." This demonstrates how although the small craft breweries lacked resources compared to the large incumbents, they managed to shape the market through beer's image.

> *"It's the brave small entrepreneurs who should have all the cred for driving this business, and taking business risk, and being persistent in trying to build new breweries. I don't think any of the big breweries should take any of the cred for doing this. I think that we are followers in the market." – Christina Körmendi*

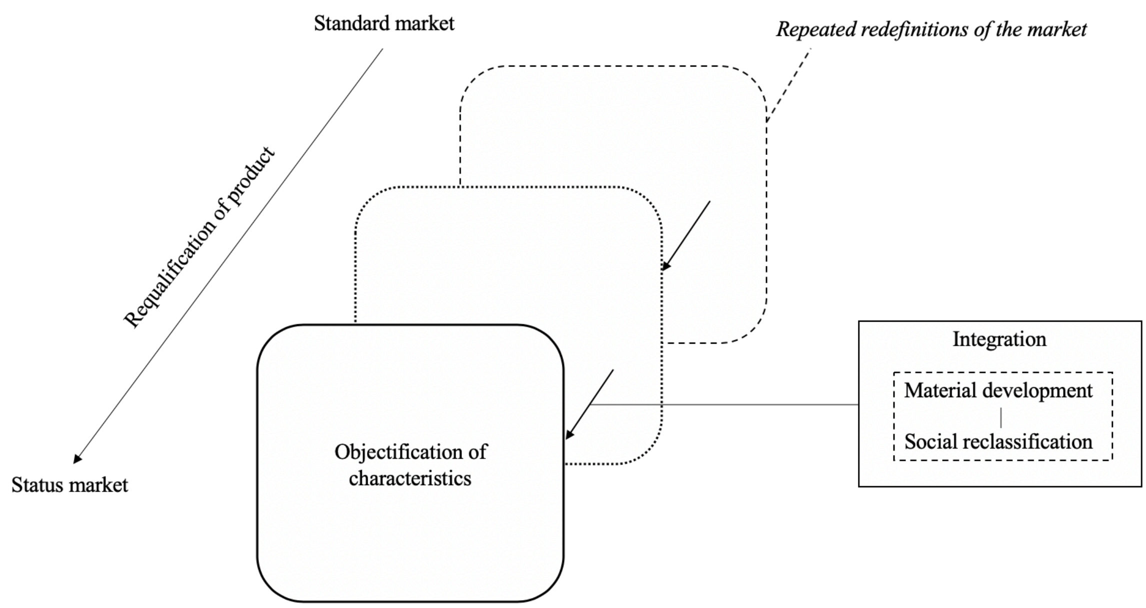
The large and small breweries have benefited each other by both contributing to the development of Swedish beer culture. While some interviewees pointed to the tension that exists between them because they have different resources, others said that they need each other and exist in a symbiosis. Johan Spendrup believed that it was the "collective effort" of large and small breweries that is "much of the explanation for the fact that [they] have actually succeeded in building beer as a whole new category that we today have much more respect for, and which is not just a bulk product." Michel Jamis, the sommelier, said that he thinks "the development and inspiration go both ways." The bigger breweries have "[looked] at what the craft breweries have done," and "invested in niche breweries," while craft breweries have learned from the "successful operations" of the large breweries. Michel gave another example for how the craft breweries have become more commercial: "Craft breweries may have reduced the level of hops in order to make their beer more light-drinkable and thus accessible to a wider audience." Michel believes "the big and small breweries will continue to benefit from each other in the future."

The interviewees demonstrated how small craft breweries had a positive effect on the image of the beer category in Sweden overall because they experimented and created excitement. By focusing on taste and links to gastronomy, they emphasised the experiential elements of beer-drinking and further raised the status of the brewer. Thus, the craft breweries drove the market through their vision. And in responding to changes in the market, large breweries helped to stabilise the new aspects that were being added to beer by these smaller, market driving actors.

5. Discussion

Previous research shows that social influence can be an effective strategy for driving markets characterised by high value complexity and ambiguity (Humphreys & Carpenter, 2018). The findings from our case study of the Swedish beer market illustrates how the effectiveness of market driving is not dependent on markets already characterised by these specific conditions. Our analysis shows how various market actors have collectively requalified beer to increase value complexity and ambiguity through *material development, social reclassification, objectifying characteristics,* and *integration*. Figure 7 illustrates how these practices interrelate in the requalification of beer, increasing evaluative complexity.

Figure 7: The Processes of Requalification that Drive a Market From a Standard to a Status Market



Through *material development*, actors have altered the intrinsic characteristics of beer. Actors have redefined beer through exploration of new beer styles and development of the customer experience. Through *social reclassification,* actors have challenged the social identity of the beer consumer and linked the product with new market values. They have done so through the assimilation of qualities associated with other markets, simultaneously dissociating beer from qualities linked to the stereotypical consumer. These two first processes have redefined beer and altered the attachment of consumers. By attributing new qualities and altering the value associated with them, actors have detached consumers from their routine purchasing patterns, thus complicating the application of judgement. By *objectifying characteristics*, actors solidify the new links created through material development and social reclassification. Actors establish new classification systems through education, which frame how people qualify beer. Investments in measurement and analysis in turn affected material development. *Integration* encompasses the efforts of market actors to consolidate their simultaneous attempts at qualification through collaboration, communication, and the distribution of the requalification attempts to the mass market through commercial activities.

The four requalification processes have gradually imbued the Swedish beer market with characteristics of a status market. We show that beer used to be the “Stor Stark”, where price and alcohol level were the main product characteristics involved in evaluation. It was a standard market, where value was relatively easily determined by comparing the good to a set of standards (Aspers, 2009). The requalification attempts of beer have increased value uncertainty because of the introduction of new evaluative parameters with less entrenched classification systems, which means consumers are less able to form independent value judgements. When knowledge through standards decreases, consumers gain alternate knowledge by looking to the status of the traders to determine value (Aspers, 2009). Thus, status has become increasingly important for value judgements in the Swedish beer market.

The four processes of re-qualification have altered the behaviour of market actors and the structure of the market, demonstrating how the market has actively been driven (Jaworski et al., 2000). While market driving activities have destabilised pre-existing behaviours and structures, market driven activity has been crucial for the stabilisation of the changes and integration in the broader market. Thus, a combination of market driving and market driven approaches have together transformed the Swedish beer market. Our findings show how small craft breweries have driven the initial development of the market, which was followed by the large incumbents. The findings shed light on previous understanding of mass markets that suggests that only large incumbents possess enough resources to drive markets through the shaping of consumer preferences, because it is too costly for smaller firms (Dubuisson-Quellier, 2013). The success of craft breweries in driving the Swedish market suggests that small firms successfully can drive markets. According to our findings, a passion for beer is a characteristic that many Swedish craft breweries have in common as their primary motive for running their breweries. The resource-intensive view of market driving may overlook the importance of passion and non-financial interests in the adoption of the strategy. Our findings support recent research published in February (Baker & Nenonen, 2020) and April (Maciel & Fischer, 2020), that illustrates the success of small companies adopting a collaborative market driving approach through collective action.

The recent attention to market driving through collaborative action highlights the importance of relationships between market actors in relation to the execution of the strategy (Baker & Neononen, 2020; Maciel & Fischer, 2020). Our findings add to the current discussion by similarly highlighting the focal role of market actors other than the firm. Our analysis shows how requalification occurs through the joint involvement of all four processes and involves reciprocal influences from market actors. Through the theoretical lens of qualification, we highlight a previously under-examined aspect of market driving, namely how market driving involves activities from consumers, experts, critics, and multiple other actors as well as the firm. Maciel and Fischer (2020) support the finding as they argue that the role of consumers has been neglected in relation to market driving, and that consumers can shape markets by supporting firms' efforts as allies in the pursuit of change. Humphreys and Carpenter (2018) have shown how social influence of experts and critics allow firms to drive markets through status. Our findings demonstrate that this category of market actor also affects the requalification process to transform market conditions. Knowledgeable individuals not only have a role in markets already characterised by high value ambiguity and complexity but can also impact individuals' evaluative capabilities of products and thereby play a crucial role in the detected requalification process for market driving.

Previous market driving literature focuses on the outcome for the focal firm through competitive advantage (Baker & Nenonen, 2020; Humphreys & Carpenter, 2018; Kumar et al., 2000; Schindehutte et al., 2008; Van Vuuren & Wörgötter, 2013). We highlight a new strategic dimension as market driving and the requalification of a product can lead to positive outcomes for the market system as a whole. In the case of the Swedish beer market, actors have been driven by their vision of reducing deficiencies in their home market. The requalification efforts that these actors have initiated have driven the market transformation and benefited the entire Swedish beer market. For consumers, it has led to more variety, better quality, an enhanced customer experience and greater understanding of what they are consuming. For producers, they have been able to justify higher price points, attract new groups of consumers, and enter new social settings for consumption.

The findings suggest that status of brewers has increasingly emerged as a tool for consumers to determine the value of beer. The behaviour emerges as a consequence of navigating in an ambiguous market (Rössel & Beckert, 2013). The shift from a standard market towards a status market has implications for firms' market orientation strategies. The findings suggest social influence would be an increasingly effective strategy for generating competitive advantage, following Humphreys and Carpenter's (2018) reasoning that high value ambiguity and complexity, noisy consumer learning, and limited consumer expertise increase the effectiveness of market driving via social influence. Given the slowed growth and increased competition of the Swedish beer market in recent years, market driving through social influence can be a compelling strategy for firms that can attain high status.

Finally, the detected market driving processes of requalification also have implications for broader markets. In the Swedish beer market, actors have modelled aspects of their efforts on the neighbouring market of wine, to introduce qualities that seemingly have increased the subjectivity of the taste experience and brought beer into new social settings. Interrelations with other markets affect market delineation as actors use market templates not only in the formation of regulated markets as shown by Kjellberg and Olson (2016), but in the adaptation of existing markets. Other markets may have the potential for development through these same requalification processes that we demonstrate can benefit a range of market actors in the market system.

6. Conclusion

6.1 Theoretical contribution

This study contributes to the limited understanding of how market driving is achieved without disruptive innovation. We employed a qualitative research strategy with an inductive approach, which allowed us to explore the complex social processes involved in the nascent field. The theoretical framework of qualification combined with the emerging view of markets-as-systems enabled us to gain a deeper understanding of the mechanisms of market driving and to expand the investigation of market actors involved in the approach, thereby developing new insights for the theory on market driving.

We show how actors through a combination of market driving and market driven behaviour can alter the value uncertainty and value complexity of a product market through the processes of material development, social reclassification, objectification of characteristics and integration. We thereby expand on recent literature arguing that market driving can be pursued without disruptive innovation (Humphreys & Carpenter, 2018; Baker & Nenonen, 2020; Maciel & Fischer, 2020). Further, we nuance Humphreys and Carpenter's (2018) argument of how market driving is an effective strategy in product markets characterised by high value ambiguity and complexity, as we show how actors can actively alter these conditions of markets. By showing how market driving firms can actively alter market conditions we are also able to answer the call from Jaworski and Kohli (2017) that demand empirical research to investigate what market conditions favour a market driving approach. Jaworski and Kohli (2017) also note the importance for future market driving research in establishing certain firm characteristics that enable a successful execution of a market driving approach. The findings of our paper highlights how a shared vision of a progressive development of the beer market has been an important determinant for the successful outcome of market driving attempts by actors in the Swedish beer market.

We illustrate how the successful execution of the requalification of the Swedish beer market involved market driving practices from multiple market actors including breweries, bars, experts and trade fairs. The four processes that have produced the requalification of beer could not be controlled nor executed solely by the breweries. The insight adds to the call by Nenonen et al. (2019) asking empirical research to further involve and acknowledge the role of other stakeholders beyond the firm in market driving. The insight additionally supports recent research highlighting the potential of a collaborative approach among firms as a means to drive markets (Baker & Nenonen, 2020; Maciel & Fischer, 2020). We can establish that relationships among actors is an important element of market driving. Such alliances formed between actors at various locations in the value chain can generate powerful outcomes for the entire market.

6.2 Managerial Implications

Our research has implications for market actors that aspire to alter market structure and behaviour in product markets. Our analysis suggests that market actors actively can drive the requalification of products and transform markets from having standard characteristics to increasingly become status markets.

Figure 8: A Requalification Approach to Market Driving

Preparation

Develop vision
- *Identify referent market*
- *Discover product potential*
- *Identify new target groups*

Identify stakeholders

Form alliances
- *Producers*
- *Retailers*
- *Critics and the press*
- *Consumers*

→

Execution

Create educational arenas (learning hubs)

Educate market actors
- *Collaboration*
- *Reporting*
- *Events*

Engage structural enablers
- *Directly (supplier lobbying)*
- *Indirectly (consumer demand)*

Material development
- *Experimentation*
- *Trial and error*

Social reclassification
- *Associations*
- *Dissociations*

Figure 8 outlines a requalification approach to market driving. We suggest that managers in order to initiate the requalification process of markets must develop a vision of the altered market. Managers should develop the vision by combining three sources of inspiration. Firstly, the manager should attempt to identify referent markets where the behaviour of market actors corresponds to some extent with the intended outcome of the requalification process. In the case of the Swedish beer market the market driving actors used international beer markets and the wine market as referent markets in order to formulate their vision of the altered market. Secondly, the manager must also detect latent product potential that corresponds with the altered version of the market. The visionaries and pioneers in the Swedish beer market realised that subjective product qualities such as taste notes and presentation were undetected in the Swedish beer market. By identifying emerging product qualities that fit the vision for the requalified market, managers can guide the requalification initiatives towards the latent qualities that have potential to transform the social conception of the product among market actors. Thirdly, managers must identify and target customer segments that will value the emerging product qualities. Once the vision is established, we suggest that the firm should identify stakeholders that can align with the vision of the requalified market and form alliances to simultaneously initiate attempts that drive the requalification of the market.

The second managerial task in the requalification approach to market driving is the execution phase. To spread the requalification attempts among actors within the market system, firms should create educational arenas where market actors can learn about the product according to its redefined qualities. Our analysis shows that education is an important tool for market actors in order to detach old product qualities and attach new qualities. Firms must also identify structural enablers in the market system in order to engage them in the requalification process. According to our findings, the engagement can either be initiated directly by firm lobbying or indirectly by using customer demand as a tool to obtain change. Customers are therefore highlighted as potentially important allies for firms attempting to drive the requalification of markets. In order to succeed with the requalification attempts, firms must use their formulated vision to guide the material development process of the good and the social reclassification process of the consumers and the attached market values.

We finally suggest that managers should attempt to identify the current state of the value ambiguity and value complexity of their markets as a tool to guide their strategic action. The requalification strategy is beneficial for managers that aspire to drive the transformation of market conditions. However, when a transformation of the conditions is achieved, managers must revaluate the appropriateness of the market driving strategies. A move further towards a status market may imply greater effectiveness of market driving via status and social influence, as Humphreys and Carpenter (2018) suggest.

6.3 Future Research

The study analyses change by gathering retrospective accounts at a single moment in time. Future longitudinal research collecting data in real-time would likely generate more accurate accounts, which can further contribute to understanding to the processes of market driving through requalification. The findings have shown consumers and advertising agencies may have significant roles in requalification attempts in markets. Therefore, research including a focus on their accounts through in-depth interviews would provide valuable insight into the processes of market driving by actors other than the focal firm. It would also further explicate consumers' reactions to requalification attempts, such as how they appropriate new products and use them in various practices.

Our study is explorative and hence our findings serve as a starting point for more practical and quantitative research. Market driven and market driving strategies have been shown to complement each other in different ways, both within and between firms. The evolution of market orientation strategies within a market warrant further exploration, as do the dynamics of how the market orientation of firms affect one another within a market. The four processes outlined of driving a market from a standard market towards a status market through requalification require further examination in different contexts. In addition, future research could focus on requalification attempts that have failed in their execution, to understand constraints that moderate the potential for change. This may help to identify the activities most central to success. Finally, as education has been highlighted as an important feature for the transformation of market conditions through requalification, future research could look at online forums and their effectiveness for change versus in-person forums. This is a particularly salient point as much of daily life has moved online due to COVID-19.

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Appendix

A. General Interview Guide

INTRODUCTION

Introduction of topic
Request to digitally record
Question of anonymity
Recording of key information (age, gender, past and current employment positions, years in industry)

BROAD QUESTIONS

Can you tell us about your background – how did you get into the beer industry? What was your role and responsibilities?

How has the Swedish beer market developed since you entered the industry?

What do you think caused this development?

Are there any specific actors who have been particularly important? If so, how have these affected the development of the market?

SPECIFIC QUESTIONS

How have customer preferences with beer changed over time? What do you think has caused this?

Who are the consumers of beer? Has this changed over time?

What aspects of beer are important for sales?

How is the quality of beer assessed? Has this changed?

How do breweries and other market actors relate to each other? What are some of your most important relationships? How have these relationships developed over time?

FINAL THOUGHTS

Is there anything you think we have forgotten to ask you, which would help to explain the shift that has occurred in the beer market?

Are there any other people who you think we should talk to?

B. First-Order Concepts / Interview

First-Order Concepts / Interviewee	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**11**	**12**	**13**	**14**	**15**	**16**	**Total**
Experimenting and exploring	x	x	x	x	x	x	x	x	x	x	x	x		x	x	x	**15**
Improving quality			x	x	x		x	x	x	x	x	x			x	x	**11**
Increased focus on design		x	x	x	x					x		x	x		x	x	**9**
Premiumisation			x	x	x		x	x	x		x		x	x	x	x	**11**
Developing the customer experience							x	x		x				x		x	**5**
Linking to gastronomy	x	x	x	x	x			x	x	x	x	x	x	x	x	x	**14**
Linking to creative industries		x			x					x					x		**4**
Dissociating from inebriation	x	x								x		x		x	x		**6**
Connecting to the local and small-scale	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	**16**
Educating market actors	x		x	x			x	x	x	x	x	x	x	x	x	x	**13**
Defining taste notes			x				x	x		x	x	x	x	x		x	**9**
Increasing measurement and analysis					x		x	x	x	x							**5**
Altering rating and evaluation			x		x		x	x		x	x	x	x	x		x	**10**
Imitating	x	x	x	x	x	x	x	x				x	x	x		x	**12**
Collaborating	x	x	x	x			x		x	x		x		x	x	x	**11**
Attracting new consumer segments		x	x	x	x		x	x	x	x	x	x	x	x	x	x	**14**
Distributing to mass market	x	x		x	x	x		x		x		x	x	x	x	x	**12**
Expanding variety	x	x	x	x	x	x		x			x	x		x		x	**11**
“Stor Stark”	x	x	x		x	x	x	x		x	x	x		x	x	x	**13**

Numeric Code for Interviewees

1 Erika Lillieström
2 Alf Tumble
3 Sylvia Falkeström
4 Johan Ahlstedt
5 Ronny Carlsson
6 Eric Berntson
7 Anders Ström
8 Johan Spendrup
9 Mikael Engström
10 Fredrik Glejpner & Martin Jämtlid
11 Nadja Karlsson
12 Marianne Wallberg
13 Ivar Backman
14 Michel Jamis
15 Rasmus Samuelsson
16 Christina Körmendi

C. Empirical Evidence for First-Order Concepts

First Order Concept	Empirical Evidence
Material Development	
Experimenting and exploring	Anders: *"There are new types of breweries coming up. In Sweden, we have had a tremendous development as many new craft breweries have started in the past seven to eight years. So there has been a huge explosion and even new types of beer are popping up all the time."* Ronny: *"What I generally believe that young Swedish breweries benefit from is that in many cases there are not so many expectations of what exactly beer is, it creates a freedom for these breweries to be creative and explore different opportunities associated with beer."* Johan A: *"If you reverse the band to four or five years ago, only a handful of producers in Europe made very experimental products. Experimental in that they turned and twisted what beer was, that products were manufactured that had similarities with art installations and molecular cooking. Today, this type of beer is much more common. Thus, the criteria for what is required of an actor to stand out changes."* Erika: *"Before, the focus was mainly on very simple, clear products. Today, breweries have wider product portfolios. There are a lot of drinks and products that are more like crossovers, where you almost do not know what they are. There is an innovative power."* Michel: *"What I think has happened lately is that you can see how some [breweries] are starting to specialise. A brewery like Brekeriet now only makes sour beer, while some other breweries only make light beer, etc. I think the breweries have matured and begun to understand what they are passionate about. It has become a little more individualistic."*
Improving quality	Anders: *"Then we also have some breweries that we have worked with a lot over the years with whom we have good contact and where we always know the products hold good quality. It is mainly the Swedish breweries that I mentioned earlier, who have never actually given us a beer of poor quality that was defective."* Christina: *"Quality has increased a lot in general. Smaller breweries can have quality issues with contaminations. But I think once it gets to the market, to Systembolaget, consumers shouldn't have to worry about the quality."* Sylvia: *"Therefore, if you think from a purely marketing point of view, I would argue that we have worked more inwardly than outwardly with regard to maintaining a sufficiently high quality in product development and ensuring a production process that is as good as possible."*
Increased focus on design	Fredrik & Martin: *"Some buy only after label design. They basically ignore the product and say 'amen this was cool.'"* Christina: *"We have a new visual identity that is more distinct, more modern, and more interesting. So yes, visual identity is super important. And I think that is one thing that is really driving the market right now"* Alf: *"Today we see a very big focus on the design of cans and labels and that the whole tonality of beer is evolving. Even the names of beers have become important for sticking out of the crowd and there are a few different styles. It should be cocky, or funny in some other way. This development I think is very fun."*

	Ivar: *"You know this anglerfish with a glowing antenna that glows and attracts smaller fish and then eats them? The beer industry is basically the same. The fancier can you have, that it looks crazy with a crazy label, the more it attracts the customers (...) if you have a successful branding of your bottle or can, that will do all the work for you."*
Premiumisation	Anders: *"Today we can sell beer that costs several hundred kronor, which costs as much as a wine bottle, which is something we could not do before. Today there is an understanding that these products are unique and often took several years to manufacture."* Christina: *"The price is not only driven by how much we want consumers to pay. The price is to a large extent a function of what kind of ingredients that are being used. It is very expensive to brew these kinds of things."* Nadja: *"Today the acceptance of paying for beer is much higher among consumers, precisely because the knowledge of beer has increased."* Ivar: "*Like now the prices are exploding. An IPA being released now costs up to 50 kr, which is quite insane. If you go to a restaurant and you want to find a similar product you can pay easily 300 kr for a can, which is absolutely insane (...) In terms of beer, a vast proportion of all the beer is your basic cheap lager, you can't even draw a comparison. So everything else we're talking about – Porter, Stout, Saison, any type of Ale actually, is such a small proportion of the actual market. So we like to talk about that. It's the same way in the wine industry, 55% of all the wine we sell at Systembolaget is sold through bag-in-box, 3L."*
Developing the customer experience	Johan S: "*We discovered that new beer drew people, there was a feeling among guests that 'oh here is a new beer, I have to try it.' Then we also helped the pubs with our strategy – that the presentation must be perfect, the foam crown must be there, and the experience must be premium when the beer is served. So we worked to convey our strategy all the way from the company to the guest through our dealers. It was a very important part of our success. This focus was largely missing in the beer market in Sweden."* Alf*: "IPA was what started the development and showed that beer could taste so much more than a 'Stor Stark', thanks to its hops."* Christina: *"Now beer is much, much more taste-driven and diversified than it used to be. If you go back at least 10 years, it was only lager, and potentially a couple of porters and stouts (...)Today I think beer is taste driven more than anything else. People want good taste. And they want to experience different kinds of taste."* Christina: *"I think the variety of beer, and a simple thing like glassware (...) I mean before you'd have a "Stor Stark" in a half-liter pint. It's very, male, it's not very feminine. It doesn't taste very good to drink from glassware like that. So I think that the craft beer market has also driven better glassware, better explanation of what the beer is, what the taste notes are, and it has become more interesting. But in general, I think beer today is what wine was 20 years ago when people started experimenting with wine – kinds of grapes, what countries to buy their wine from etc."*
Social Reclassification	
Linking to gastronomy	Alf: *"I think that the fact that we started to care more about how the beer would taste and departed from the old definition of 'Stor Stark' is very much related to the growth of the food interest. Food was previously something we also treated fairly homogeneously but for which we now have much more in-depth knowledge*

	and interest. The food development I describe probably also gained momentum around the turn of the millennium and there, well, the development of the drink has been somewhat lagging." Nadja: *"Among the last things I did for Systembolaget – I no longer work for them – was to create a beer and gourmet course focusing on how beer and food should be combined."* Marianne: *"Today you cannot go to a fine restaurant without having a beer menu that they are proud of. We have been able to follow this development closely at Stockholm Beer & Whiskey Festival because on one of the days we only invite professionals from the restaurant world and we have experienced how they went from total disinterest in participating to a fantastic interest today, but it was a process that took a long time."*
Linking to creative industries	Fredrik & Martin: *"If you look at those who have founded the breweries, they usually have some artistic connection. There are many musicians who have started brewing. Many brewers come from creative professions. There are also those who have made money from the advertising industry or the IT industry."*
Dissociating from inebriation	Alf: *"The fact that beer has managed to get into the finer taverns and been included in many beverage packages has also contributed to more dimensions of beer as a product being highlighted. Beer has managed to get far away from the associations with intoxication and alcohol percentage. The fact that beer today is seen as a meal drink and thus attributed with gastronomic qualities has probably influenced a lot of how beer is nowadays described and evaluated. (...)We have never had any Swedish drink to be proud of. We have always had French wines. But since beer started to develop and become so good, many restaurants have started to take in Swedish beer for this very reason."* Erika: *"It has been a fantastic journey to be able to go from being a thirst quencher, a 'Stor Stark', to being a meal drink, where today there is a huge range in flavours, in styles, and alcohol variation. There is a beer if you want to drink non-alcoholic, if you are going to have a dessert, if you eat sour or salty."*
Connecting to the local and small-scale	Nadja: *"That people in smaller towns in Sweden are prepared to pay so much for craft beer was not something I had expected. In some places the beer has become a bit like a successful local football team, something you are proud of and want to support."* Mikael: *"The local has become popular in all areas. You want to know where the milk comes from, you want to have products that are produced locally when it comes to lots of different things. And it happens to fit quite well when it comes to beer."* Ronny: *"It is absolutely in time with all the craft stuff and the local and I think this has spiked the development for beer as a product."* Erika: *"Every city, every region, has its own breweries. Beer is a very local product."*
Objectification of Characteristics	
Educating market actors	Mikael: *"We have many prophets in this country. We have one like 'Janko'. 'He has propagated beer and beer styles and been curious, but above all, he has educated the public in beer."* Fredrik & Martin: *"If [customers] say 'I like this kind of beer', we help them find the right products. We also have customers who come in and say, 'I'm going to eat this today what should I have for beer', then we pick out the beers that we*

	think will work for what they should be eating. We should be able to offer our customers a drink that fits almost everything that they are eating."
Defining taste notes	Christina: *"People want good taste. And they want to experience different kinds of taste. And they want to experience what kinds of food different kinds of beer go with. It's almost like it's the food and beverage markets that have been driven together. And that's also one of the reasons we have a gastro-pub."* Johan S: *"We strived to produce more interesting beers. Our starting point was that the beers we created were primarily a taste experience and not primarily about creating brands. Through Gotlands Brewery, I wanted to build a company that was a typical regional brewery, with models from the breweries that existed in the UK."*
Increasing measurement and analysis	Christina: *"We are extremely driven by hygiene standards. But we have to be that because all our beer is unfiltered and unpasteurised, which means you have to have extremely high hygiene standards."*
Altering rating and evaluation	Christina: *"Consumers will actually ask us about what kind of yeast we use now, or how has the malt been roasted. People are extremely into beer and know a lot about it. Sometimes we have beer tastings for beginners. We also have very advanced beer tastings where we only do sours,where we include beer from other breweries,"* Mikael *"If you go in on our website and click on the beer types there is kind of a template there. For each beer there is a description, the history behind the beer, why we've chosen to do it, and then there is alcohol content and a little table of contents and stuff like that. And we have this for all the beers. And that is so we hopefully can make our customers and end consumers a little more interested, much like how you get interested in different grape varieties and growing conditions for wine."* Johan S: *"If I, as a brew master, look at many of the lager beers that I, and others with me, can think are fantastic good beers, these products often had very low ratings. The beers that are at the top of these pages are usually always very dark, very bitter and with high alcoholic strength."*
Integration	
Imitating	Alf: *"I would say that many of the large Swedish breweries have been very progressive and responded well to the development compared to how, for example, Budweiser has acted in the US market."* Ronny: *"I also think many of the medium-sized breweries will focus more on the very largest breweries in order to increase their understanding and knowledge of how commercial expansion is to be carried out and how beer should be sold on a large scale."* Sylvia: *"Before us, breweries such as Slottskällan, Jämtlands and Nynäshamn were started and we were inspired by these actors. This was in the late 90s. These breweries showed us the potential."* Christina: *"I still think the majority of the influence we get is from the US market. But of course, we are interpreting it the way we want to, then we put our special twist on it to make it a Scandinavian touch."* Erika: *"The situation was changing somewhere in the late 1990s. First, there is an international, global wave, driven from the US, with microbreweries and craft breweries. It interacts with a consumer interest – that there begins to be an interest in the local, the small scale."*

	Sylvia*: "But it is also the case that we take in influences from the outside, especially other countries around us. From the beginning, it was definitely totally on our own terms."*
Collaborating	Sylvia: *"We are part of the Swedish Independent Breweries network and it is a great way to handle certain issues together with other craft breweries as there are issues that are more present for smaller players compared to larger players because of the slightly different starting points."* Mikael: *"I think the important thing is that we work together so that we have a lot of breweries in Sweden that can make good beer, with technology and ideas and such, so that we thereby achieve a high quality. Otherwise no one will buy."* Erika: *"Nobody had started a brewery in 100 years. How do you do that? Where do you find a brew master? A brewing technician? There must have been an incredible lack of such knowledge. This has required cooperation between the breweries that are starting to pop up. The breweries are looking after each other by supporting and collaborating."* Alf: *"Collaborations and tap-takeovers are another type of activity that are having a major impact on the beer industry. For example, 5 breweries have a joint event at the Carnegie brewery and bring their own barrel there. In general, there are quite a few activities around beer."* Christina: *"In general terms, we have fantastic relationships with all other breweries. We have been hosting an event every year called bryggarkonferensen, the brewers' conference, where we invite all microbrewers in Sweden to come and meet and greet. We have lots of keynote speakers. People tend to come and bring their beers."*
Attracting new consumer segments	Rasmus: *"When we started to develop our assortment of low alcoholic beer, we noticed that among many men there was an attitude that was a bit 'well, I should have strong beer' while among women there was another purchasing power for this type of beer."* Ronny: *"Along the way we noticed that we had broadened the target group and that the reading was reaching a significantly larger audience. It is similar to how the beer industry has developed in recent years. A brewery starts as something small and geeky but grows through increased demand and then reaches a larger audience."* Alf: "*I think the total amount of beer drinkers has increased, and the gender distribution within the segment has also changed, which is fun and good. Otherwise, I also think that beer has been looking upwards in social contexts. I think people who have more money today can imagine drinking beer to a different extent than before. Beer has become fine and is now okay to serve at dinner or after golf."*
Distributing to mass market	Alf: *"[Craft] beer has managed to go from small-scale to exploding, and it is very much thanks to the fact that the large breweries have had to make beer in new ways in order to compete and survive."*
Expanding variety	Johan S: *"Today these [big] breweries own many smaller brands that are not associated with the main brand. What they do then is to create a product type with a certain focus where you allow creativity to be more permissive than it may be for the main brand. Within these product groups there is also a greater exchange of products with a dense frequency. That development has already begun, and is bound to continue to move forward."*

D. Systembolaget Assortment Data

Fixed assortment at Systembolaget

Year	Number of Segments*	Number of Producers	Number of Price List Headings**	Number of Products
2005	15	102	8	314
2010	17	101	7	285
2015	17	127	8	320
2020	19	146	48	343

Fixed assortment and products from local breweries at Systembolaget

Year	Number of Segments*	Number of Producers	Number of Price List Headings**	Number of Products
2005	15	102	8	314
2010	17	101	7	285
2015	18	208	8	671
2020	23	394	64	1893

**Segments of beer divided according to style and price class*
***The price list headings are the divisions that customers see on Systembolaget's website*

Source: Systembolaget Analysis Department, 2020