Private label effect on small producer business development

A multiple-case study from a producer perspective

Handelns egna märkesvarors inverkan på små producenters affärsutveckling – En fallstudie från ett producentperspektiv

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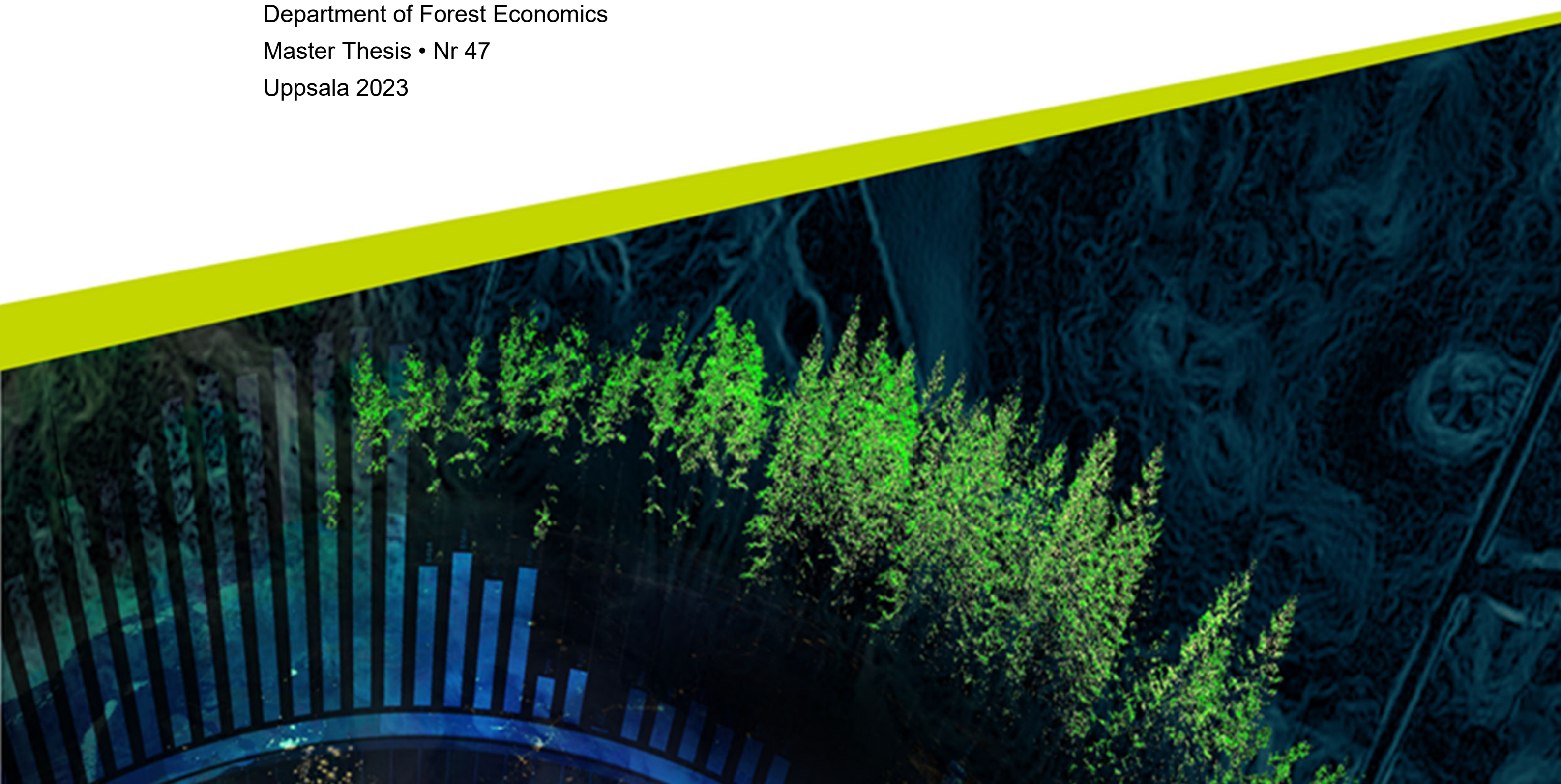

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Summary

There is an unstable environment surrounding us today with varying interest rates, increased commodity and energy prices. With price increases in many areas at the same time there has been a successively decrease in people's private budget. With less money to spend, the hunt for low-price products in food retail has increased. At the same time, private label products in food retail have increased rapidly, now being 29% of the total assortment in food retail (SCB, 2021). To help consumers in these more difficult times, representatives from food retail have mentioned that they will increase the number of private label products in store. Representatives from food producer organizations, on the other hand, say that this becomes at the expense of small food producers brand loosing shelves space and sales for their own brand products. This has shed light on Swedish food retail's high market concentration, were 89% of the market shares are owned by only three companies. The aim of this study has therefore been to describe small food producers' perception of private label effects on their business development and to identify the optimal collaboration between food retail and small food producers from a producer perspective. The research was made with a flexible design where four case companies, two in agricultural sector and two in food manufacturing sector, were interviewed using semi-structured interviews. A thematic analysis was made where the themes later was analyzed with the help of chosen theories and a conceptual framework.

The findings showed that there is a consensus amongst the interviewees regarding that the relationship with food retail needs to be developed, but how this should be made differs widely. It was notable how it was the interviewees representing agricultural companies who were worried about the long-term effects on the business development of food production in Sweden to a greater extent than the interviewees operating in the food processing industry. The interviewees from agricultural companies are also the ones who mentions the need for regulations from politics regarding how private label products should be managed in the food chain.

Keywords: Business strategy, food producer, food retail, power and dependency, primary production

Sammanfattning

Världsmarknadens instabilitet har ökat vilket tagit uttryck i ökade energikostnader, räntekostnader och råvarukostnader. Med prisökningar som sker inom flertal områden på samma gång har människors privatekonomi som ett resultat av detta successivt försämrats. Med mindre pengar i plånboken har jakten på låg-pris produkter i dagligvaruhandeln tagit fart. Samtidigt har andelen EMV-produkter i dagligvaruhandeln ökat markant. Under 2021 bestod 29% av alla produkter i handeln av just handelns egna märkesvaror (SCB, 2021), och det finns anledningar att anta andelen under 2022 vara ännu högre. Representanter för dagligvaruhandeln har sagt sig vilja hjälpa sina kunder under dessa tuffa tider genom att öka andelen EMV-produkter i sortimentet. Samtidigt säger representanter från livsmedelsföretagen att detta sker på bekostnad av mindre varumärken som då tappar plats på butikshyllan och tillika försäljning. Detta har riktat strålkastarna mot Svenska dagligvaruhandelns höga marknadskoncentration, där 89% av marknaden ägs av endast tre företag. En hög marknadskoncentration kan vara synonymt med en sämre fungerande konkurrens. Det skapar även förutsättningar för dagligvaruhandeln att till större utsträckning bestämma själva över produktpriser och sortiment. Syftet med detta projekt har därför varit att beskriva mindre livsmedelsproducenters uppfattning av EMV-produkters påverkan på deras företagsutveckling samt att identifiera det optimala samarbetet mellan dagligvaruhandeln och mindre livsmedelsproducenter från ett producentperspektiv. Studien är gjord med en flexibel design där fyra fallföretag, två inom lantbrukssektorn och två inom livsmedelsindustrin, har intervjuats med semi-strukturella intervjuer. Därefter har en tematisk analys gjorts från vilka teman har analyserats med hjälp av utvalda teorier och ett konceptuellt ramverk.

Slutsatsen har varit att det finns en samsyn mellan producenterna gällande huruvida relationen mellan dem och dagligvaruhandeln behöver utvecklas, men hur detta tar sig uttryck skiljer sig en del mellan de olika respondenterna. Vad som var noterbart var hur respondenterna från lantbrukssektorn var dem som var mest oroade över de långsiktiga effekterna på utvecklingen inom den Svenska livsmedelsproduktionen till följd av dagligvaruhandelns maktposition. Det var även dem som i större utsträckning nämnde ett behov av nya regleringar från politiskt håll kring hur EMV-produkter ska hanteras i livsmedelskedjan för att de långsiktiga effekterna inte ska vara på bekostnad av den Svenska livsmedelsproduktionen.

Nyckelord: Dagligvaruhandeln, livsmedelsproducenter, makt och beroende, primär produktion, strategi

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EU	European Commission	13
KPIF	Consumer Price Index	13
KRAV	Control Organization for Alternative Farming	14
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SCB	Statistics Sweden	13

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1 Introduction

In the first chapter an introduction to food retail and food producer development are made. The concept of private label products is presented and followed by a problem background regarding current challenges within food retail. This ends up in a problem discussion that finalizes with an aim, research questions and delimitations.

1.1 Introduction

The early 2020s in Europe were characterized by political instability and effects of a world epidemic. The Covid-19 pandemic followed by a full-scale war in Ukraine caused major effects on world economy (Arvidsson, 2023). After Ukraine was attacked by Russia in 2022, a summer of instability followed in the commodity market where political instability as well as a significant increase in energy costs influenced primary production, food producers and the food retail. Raw materials from the food sector became more difficult to obtain, and a significant price increase of commodity's as wheat and rapeseed-oil, amongst others, started to be seen (Luque, 2023). The instability also gave rise to undesired effects as inflation (Arvidsson, 2023). During 2022 the food prices increased by eighteen percent - making it one of the most extreme cost increases experienced by Swedish food industry in modern times (Swedish Food Federation, 2023, 1). The increased commodity prices and raised interest rates have successively initiated a decrease of people's private budget (Crofts, 2023), which is mentioned to be the foundation of a fundamentally change in buying behavior (Swedish Food Retail, 2023).

These changes in buying behaviour has been noted by food retail as-well. The CEO of ICA Sverige, Eric Lundberg, stated that ICA was working hard to ease their customers decreased budget by offering competitive and price worthy products. To do so, their solution is mentioned to be to invest even more in ICAs private label products (Beslic, 2023, 4-5). *Private label products* were introduced in food retail for over 30 years ago (TT, 1989; Larsson, 2002) and has been a part of the assortment ever since. Private label products are produced for a food retail company by a third-party manufacturer, but sold as food retails own brand (BigCommerce, 2023). This can be compared to *food producer owned brand*, which are the regular branded products owned by the manufacturer itself - for example *Coca-Cola*, *Heinz* and *Lay's*. The implementation of private label products has not only transformed the market dynamics (Herin, 2023) but also the buying behavior of consumers (Borgström and Josefsson, 2015).

The food retail market has developed towards larger companies that can make coordinated purchases to provide economies of scale. In Sweden today, the three companies ICA, Coop and Axfood together account for 89% of the market (DLF, 2022, 1). This makes Sweden one of the countries were market concentration in food retail is the highest (Bern *et al.,* 2018). Swedish food retail oligopoly, high food prices and a sustainable food system have been the primary topic in a discussion in media which gained momentum in the spring of 2023. The discussion has partly consisted of Sweden's finance minister expressing that it is the food retail suppliers that need price pressure (TT, 2023) while the food industry and employee organization Swedish Food Producers questions what the producers should do with their increased costs that occurred as a result of external events (Swedish Food Producers, 2023). The VAT rate is also taken up in the discussion, where the questioning partly concerns to the VAT rate on food in general, and sustainably produced food in particular. Domeij (2023) questions whether it is reasonable that the most engaged consumers should be the ones that drive the entire change of the food system towards sustainability. It is notable that the Swedish food system is exposed to many disturbances at the moment. Whether to what degree the Swedish food system is resilient against such disturbances is questionable. Högberg *et al.,* (2018) explain that there is a need to do Swedish food production more resilient against crises and extreme events, but that resilience is also difficult to achieve in such an economically stressed industry that is heavily dependent on other actors and resources.

The products in food retail comes from a broad span of producers where the buying process differs, but the main way of purchasing is through food retails own wholesale systems where orders are placed directly to the retailers' central warehouse. In addition to this, each store can also choose to buy directly from manufacturers and producers. ICA buy approximately 25% of their products directly from local food producers (ICA, 2021) while Coop buys 29% of their products from local food producers (Coop 2023a; Coop 2023b). The majority of food producer organizations in Sweden consist of small food producers with growth potential (The Swedish Food Federation, 2020, 7). The definition of a smaller food producer by European Commission (**EU**) (2019, 3) is that *micro firms* have <10 employees, *small firms* <10-49 employees. The Swedish Food Federation (2020, 7) define *small food producer* as a company with less than 10 employees. Further in this study *small food producers* will relate to firms with less than 10 employees.

1.2 Problem background

The proportion of private label products in food retail differs globally, but how the market share increase for private label products is similarly independent of country. In USA the market share for private label products was about 22% in 2019 and increasing (Gielens *et al.,* 2021), and the average for seventeen European countries was 30% in 2019, increasing as-well (Sansone *et al.,* 2021). In Sweden, Statistics Sweden (**SCB**) started to measure the amount of private label products in food retail in 2004. The proportion of private label products was 8% at the time, in 2021 the number has increased to 29% (SCB, Statistics Sweden, Food Sales 2021). The numbers for 2022 have not been published at the time of writing, but there are reasons to believe that it is higher due to how the continued rising of inflation according to consumer price index (**KPIF**) affects consumer buying behavior (SCBb, 2022) towards low price products.

There is a general pressure for small producers to join and work towards receiving private label-contracts due to their continuously increasing share of the market (Herin, 2023). The economies of scale by producing private label products may lead to increased sales, but it does not always lead to increased margins (Gielens *et al.,* 2021). The margin of the products depends on the contract that are determined by the two-parts food producer and food retail representative, including agreements of delivery and sales terms. For food retail, this gives the advantages of economies of scale while it also increases their negotiation position (Bern *et al.,* 2018; Inderst and Wey, 2007). For food producers on the other hand, the advantages followed with a private label contract are economies of scale as well –but their negotiation position is instead weakened. This is due to how private label contracts give the food retailer possibility to gain knowledge about sensitive information as product calculation and manufacturing costs (Bern *et al.,* 2018). The weakened negotiation position for small food producers is also argued to be a result of the high market concentration in the food retail sector, giving a power problem between food retail and its food producers (Bern *et al.,* 2018). One outcome of this is more competition in the shelves space between producer owned products and private label products.

”When private label products get more space on the shelves, it is at the expense of other products. But it won’t be Coca-Cola our Heinz ketchup that is removed. But it is the small food producers, with more niche brands, that are the losers here” (Herin, 2023:13).

The discussion of power problems related to weak negotiation position for producers is discussed in line with how the share of private label products has increased in food retail assortment. The on-going inflation has intensified the discussion about private label products effect on Swedish food producers. Problems regarding power concentration is also seen as decrease of product position in store shelves (Swedish Food Federation, 2023). In December 2022, the most important consumer trend is noted as low prices. Carl Eckerdal, Chief Economist at Swedish Food Federation, argue that this too occurs at the expense of Swedish food producers.

“When the hunt for low prices increases, it’s no wonder that private label products gets a boost. It is also reinforced by the fact that food retail highlights their private label products at an even greater degree in campaigns and physically in stores. Our member companies are very clear aware of the progress of private label products. Total 90 percent state that they experience tougher competition from private label products in 2022, and much suggests that private label products will take up even more space on store shelves in the future. Unfortunately, this is at the expense of Swedish food producers’ own brands, and there is a great risk that the range and variety in the stores will decrease significantly” (Swedish Food Federation, 2023:1).

It is notable that how food retail highlights their private label products tends to be at the expense of small food producers (Swedish Food Federation 2023, 1). In order for new and local products to succeed in their sales and remain on the store shelves, the collaboration between representatives of food producer owned brand and the retailer is considered to be the key (Moström, 2022). In a grocery store, it is possible to use tools as specific product advertising, store exposure or price and assortment changes to influence customer choices in favor for specific products (Röös *et al.,* 2020, 137). Adding to this, there are international research showing that food retail strategically uses these marketing tools to favor their private label products, which in turn affects the assortment width at the expense of food producer owned brands (Bern *et al.,* 2018, 137).

1.3 Problem discussion

The strategic goals presented by the Swedish Government as “The Government’s Food Targets for 2030” involves that the consumer should be able to do conscious and sustainable choices in their grocery store as *locally produced* and ecological food (Government Office, 2017, 1). The goal is also that the rules and guidelines shall support *competitive and sustainable food chains* where Swedish production increases. The strategic goals are being on-going reviewed by the representatives of the Swedish Government during the spring of 2023 (Swedish Government, 2023). The competitiveness of Swedish food chains today is questioned due to the high market concentration in Sweden. There are many ecological and sustainability certified producers in Sweden (KRAV, 2023a; Agricultural Agency, 2023), but the number of sustainability certified products in food retail do continue to decrease (KRAV, 2023b). The high market concentration gives Swedish food retail a stronger market power in comparison to food retail in other countries (Bern *et al.,* 2018). It also creates pre-conditions for food retail to make their own decisions regarding pricing and assortment to a higher extent in each grocery store (Borgström and Josefsson, 2015; Lundin, 2011, 144). Despite this, markets with high market concentration tends to be a result of less well-functioning competition (Daunfeldt *et al.*, 2017). In a less well-functioning competition greater opportunity to use market power is created (Bern *et al.,* 2018). For food retail, this market power lowers the risk to invest even more in private label brands - simply since they do not have much to lose. Adding to this, how the Swedish food system has difficulties being resilient (Högberg *et al.,* 2018) forwards the questioning regarding to what extent private label products affects making small producers more or less resilient against e.g. increasing prices of raw material or lowered margins from food retail.

The power issue of less well-functioning competition in food retail market is similar to how the dependency between actors in Swedish food value chain relies on co-operation and integrated relationships (Lundin *et al.,* 2018). Today, the co-operation and integrated relationships in food value chain is deemed to have development issues. There is a not so well-functioning co-operation which shapes defensive attitudes between actors that inhibits their actions for innovations – giving negative effects to the whole value chain (Lundin *et al.,* 2018). For this, food retail is argued to favor on food producer's business idea and development which in the long run reduce pace of innovation and development in the food chain as a whole (Bern *et al.,* 2018). Regarding innovation for food producers the discussion tends to have two sides. From the producer point of view, the increase of private label products is argued to be positive due to the increased competition giving producers incentives to develop new products (Bern *et al.,* 2018, 137). On the other side, private label products are mentioned to just be an imitation of other brands products, which instead inhibiting innovation among food producers (Bern *et al.,* 2018, 137).

The debate regarding how the increase of private label products owned by food retail removes food producer owned brand produced by small food producers from the store shelves is highly current (Swedish Food Federation 2023; Herin 2023). Despite this, the effects of food retail's market power and strengthen negotiation position are frequently discussed (Bern *et al.,* 2018; Borgström and Josefsson, 2015; Inderst and Wey, 2007). In this discussion, food retail's increased insight into the primary producer's product calculations and also superior bargaining power to lower the producer's margin is significant. Lower margins affect producer's yearly yield, which jeopardizing ability to survive in the long-term. Adding a not so well-functioning competition on the market raises question regarding how the collaboration between food producers and food retail shall continue, both in a short-term and a long-term perspective.

The food retails perspective has been reviewed several times (Beslic 2023*;* Axfood 2023; Daunfeldt 2017; Orth and Maican 2012; Cantillon *et al.,* 2005), but there is a lack of description of producer perspective of the problem. Possibly, the small food producer perspective can add new insights and be an important complement to the discussion towards developing new models for collaboration between food retail and small food producers. To not risk excluding important information the decision has been to involve food producers from both primary production and food production.

1.4 Aim and research questions

The aim of this study is to describe small food producer's perception of private label effects on their business development and to identify the optimal collaboration between food retail and small food producers from a producer perspective. The study addresses the following research questions:

I. How do Swedish food retail and their private label products affect the business development of small food producers?
II. How do small food producers want to collaborate with food retail?
III. Which factors are contributing to new ways of collaboration?

1.5 Delimitations

There is a wide range of food producers that serves as suppliers for Swedish food retail. Larger food producing companies are not the ones being assumed to be the losing part when private label increases (Herin, 2023; Swedish Food Federation 2023). Larger companies do in general possess greater capital and resources, and thereby the opportunity to be more competitive in food retail. For empirical delimitations, all companies above 10 employees have been delimited from this project.

For theoretical delimitations, a wide range of literature has been reviewed to not risk excluding relevant frameworks. Focus in this project was placed on business-to-business relationships in a **RDT**, Resource Dependent Theory, framework. A classical complementary model, Porters five forces was also selected for its usefulness to explain power relationships. However, all aspects of Porters five forces were not included. The forces *Threat of new entrants* and *threat of substitute products* were delimited from the conceptual framework. This were made to delimit the researched area to the power relationship between the actors. Despite this, delimitations in terms of economic factors that relate to legal aspects and contractual agreements are not included in the analysis. Contractual agreements are created in different ways depending on the power and dependence relationship between the actors. A finished contractual agreement is in other words a result completed by actors who are dependent on each other. Therefore, contractual agreements have been delimited from this project since they are created dependent on the relationship between actors, and not the other way around. The legal aspects have been left out as well. This is partly because law and regulations come with limitations, and limitations do often need to be overlooked when new ways of working are created (Glasbergen, 2011). The aim of this study is partly to identify the optimal collaboration between food retail and small food producers from a producer perspective, the interviewees were further asked to think of new ways of collaboration outside the frame occurring today. When new innovations are created, the legal aspects might need to change too. Therefore, legal aspects have not been included at all.

2 Method

In chapter two the selected research design is presented together with the reasoning behind the choice of method. It is also described how the work progress have ensured to take quality and ethical aspects into consideration during the whole process. This multiple-case study is based on a flexible design where semi-structured interviews is made with four small Swedish food producers.

2.1 Research design

This study involves how individuals in small food producing companies perceives to be affected by private label products, and how they want to collaborate with food retail further on. Each individual can have completely different experiences and relate these to completely different causal relationships. It is therefore important that everyone's input is noted and that the theories chosen are based on the individual's perception – and not vice versa. This allows to work with a flexible design during the study, since it provides the opportunity to adapt the theory to the empirical material (Robson and McCartan, 2016). Both food retail and small food producers act in a real-life context. Small food producers' view on collaboration with food retail is also a fairly unexplored area. When case of events in a real-life context is deemed to be unexplored, case studies are mentioned to be especially appropriate (Eisenhardt, 1989; Flyvbjerg, 2006; Yin, 2018).

In this study where small food producers' perception is central to describe, multiple units to analyze is preferable in order to fulfill the aim. A multiple-case study comes with the responsibility of using *replication*. Yin (2018, 55) mentions that the cases must be wisely chosen so that each individual case either predict comparable results (literal replication) or predict opposing results but for anticipatable reasons (theoretical replication). The number of case companies needed in order to reach literal replication in the study were four.

2.2 Unit of analysis

The number of stakeholders along a food supply chain is numerous. Food products and its raw material acts on a global market, and there is not unusual for both distributors, freight companies and intermediaries to all be involved in order for a food product to reach its end consumer. The chosen unit of analysis can therefore affect the result in very different ways dependent on limitation. The chosen unit of analysis in terms of market and case companies is therefore based on the assumption that those are the most relevant in order to reach the aim of describing small food producer's perception of private label effects on their business development and identifying the optimal collaboration between food retail and small food producers from a producer perspective.

2.2.1 Market

The trend of increasing private label brands is similar in several regions over the world (Gielens *et al*., 2021; Sansone *et al.,* 2021). In comparison with other European Countries, Sweden does have a distinctively high market concentration where 89% of the food retail consists of only three actors (DLF, 2022). In the meantime, Daunfelt *et al*., (2017) indicate that having a high market concentration over a long time can indicate on a less well-functioning market competition. There are also indicators that the power relationships between actors within Swedish food retail market are having challenges (Herin 2023;

Swedish Food Federation 2023). The unit of analysis in terms of market were therefore chosen to be limited to Swedish small food producers and its Swedish food retail customers.

2.2.2 Case companies

The unit of analysis in terms of case companies where chosen to be small producers in the food chain, which are actors in both agricultural sector and food manufacturing sector. Producers in agricultural sector are often referred to as *primary production* (Swedish Food Agency, 2023) while food manufacturers are referred to as *food producers*. The value chain differs for each individual company within these sectors. Some sell through intermediaries or wholesalers while others sell their products directly to food retail. What is similar for the case companies within both sectors is how their end-consumer buys their products in food retail. In order to not delimit a perception of either, both primary production and food production companies where chosen as case companies. To select relevant case companies a criteria map was created. This map included the criteria for being a case company, and also acted as a guideline for choosing case companies.

The criteria for selecting case companies are related to company size and selling a producer owned brand or selling private label products. A convenience sampling was made by contacting small producers that reached the study criteria and were geographically close to the author. The interviews occurred one by one until literal replication where seen after interviewing the fourth company. The case companies are presented below in Table 1.

Table 1. Case companies and which criteria they met

Company	**Small firm <10 employees**	**Primary production *or* Food manufacturer**	**Produce own brand products *or* private label products**	**Main customer is food retail**	**Products produced**
The potato chips factory	5	Food manufacturer	Own brand products	Yes	Potato chips
The farm	5	Primary producer	Private label products and intermediary owned brand	Yes	Meat products and lentils
The ice-cream factory	3	Food manufacturer	Own brand products	Yes	Ice-cream
The milk farm	2	Primary producer	Private label products and intermediary owned brand	Yes	Milk

As seen in Table 1 the chosen companies all operate in different segments of the food industry, with two companies in primary production and two companies in food production, all producing different kind of products. The private label products produced by the primary producers are made at the intermediary step in the supply chain, which is illustrated in Figure 7 and Figure 9 in chapter 4.2.

2.3 Data collection

To collect data suitable for the aim semi-structured interviews were made. An interview guide was created with general questions that were asked to all interviewees, while in-depth questions to follow up different answers from the interviewee's were asked adapted during the interview. Two of the interviews were made over telephone, while the other two interviews were made over e-mail in a text format. All interviewees received the same general questions, as presented in Appendix 1.

One of the strengths with semi-structured interviews is that it provides perceptions and attitudes from the interviewee (Yin, 2018), which is beneficial when wanting to describe small producer perceptions. On the contrary, one of the weaknesses with semi-structured interviews are biased information in the answers due to the different power dynamics between interviewer and interviewee – especially if sensitive subjects are touched (Kvale, 2006). The power relationship between Swedish food retail and its small producers are discussed in some respects that might be seen as negative from producer point of view (Swedish Food Federation, 2023; Herin 2023). It is therefore possible that some questions regarding the relationships between the producer and food retail are deemed as a sensitive subject to the interviewee. To minimize biased information Yin (2018) believes that questions considered to be of a sensitive nature should preferably be asked at the end of the interview. At that point, building trust between interviewer and interviewee has had the opportunity to take place. The questions that were considered to be of a more sensitive style were therefore moved to the later part of the interview manuscript. In Table 2 the themes of the interview guide and how they are related to research question is presented.

Table 2. How themes and questions are related to theory and research question in interview guide

Theme	Questions	Related to theory and research questions...
Business strategy	About interviewee's business strategy, if there has been changes of strategy and if these are related or not to circumstances outside the company -	**RQ1** Sustainable strategic positioning Resource Dependency Theory
Power and dependency	Perceived power and/or dependency within supply chain in food industry in general, and between case company and its customers in particular	**RQ1** Resource Dependency Theory
Relationship	General questions about relationship between producer and food retail. Who initiates negotiations? Do you work on improving your relationship in some way?	**RQ1** Resource Dependency Theory
Private Label	Questions about interviewee opinion on private label in general and its effect on business development for case company.	**RQ1** Resource Dependency Theory The Partnership Activity Ladder
Trade-offs	Value creation and how case company value offer can gain or restrain food retail companies value offer	**RQ2 + RQ3** Sustainable strategic positioning The Partnership Activity Ladder
Partnership	Questions about food producer idea of best way for food retail and small food producers to collaborate. Which factors is important in order for this to be possible?	**RQ2 + RQ3** The Partnership Activity Ladder

The themes were decided upon through the literature review made before writing chapter one, together with the literature review before writing theoretical chapter three. The entire interview guide is presented in Appendix 1.

2.4 Data analysis

To analyze the empirical material a thematic coding analysis was made. Robson and McCartan (2016) imply that thematic content analysis is a generic approach that is useful when the data is not limited to a certain level of interpretation. Codes can be made out of both specific words from the interviewee and strategies towards optionally goals (Robson and McCartan, 2016). The difficulties about coding are that researchers do often miss out on explaining the procedure of how it has been done (Robson and McCartan, 2016). The full step-by-step process of the coding procedure i therefore presented in Appendix 2. One part of the analysis process is presented in Table 3 by showing which words was repeated mostly by each case company at each theme. The case companies are all anonymized under fictitious names in Table 3 and also further in the whole study. The reason for anonymizing the case companies is later described in chapter 2.5.1.

Table 3. Most repeated words in all categories and themes by each case company

Company	**Most repeated words**
The potato chips factory	Central agreement (relevance, power) Pricing (power, margin)
The farm	KRAV (certifications, sustainability) Pricing (power) Politicians role (responsibility, involvement)
The ice cream factory	Demand (food retail, consumers, regions) Pricing (power, marketing)
The dairy farm	Regulations (power, private label) Pricing (private label) Swedish production (resilient, crisis)

As presented in Table 3 the words pricing and power are repeatedly mentioned by all case companies. This repeating is interpretated as reaching literal replication and is what lies behind the decision of not adding another case company.

2.5 Quality assurance

To remain objective during interviews is essential for making scientific contribution of good quality (Yin, 2018). One way of doing so is to use triangulation of data (Yin, 2018; Robson and McCartan, 2016). In this project it is therefore preferable to study the empirical material from different views. The primary source of empirical material are the semi-structured interviews with four case companies. An empirical background presentation is also made about the small producers in order to receive a better understanding of each companies' characteristics. This information is also based on the interviews held with each case company. In addition to this, an empirical background chapter about food retail has been made. The brief insight into food retail and their point of view gives another perspective on the current situation. The empirical background about food retail is solely made of secondary material and consist of articles together with food retail's own reports. It is possible that primary sources from food retail would strengthen the quality of the analysis further, but this have not been made due to time limitations.

To assure quality of data analysis it is also important to check for researcher effects and representativeness (Robson and McCartan, 2016). To assure this, choosing case businesses from a broad spectrum that falls within the scope of previously presented criteria were made. One risk necessary to mention regarding researcher effect is how one of the case companies is a company that the author is co-owner of. The author has been extra thoughtful of using objectivity during this specific interview in particular and has not discussed the subject at all with the interviewee before the interview were held.

After interviews were made the respondents who were interviewed over telephone received a transcript of the whole interview. This was in order for the respondents to confirm if the interviewer had perceived the interviewees perceptions and descriptions correctly. Bryman and Bell (2011) call the procedure *respondent validation* which is aimed to seek confirmation or opposite from the interviewee. The interviewees who were interviewed over e-mail was not sent a transcript since the answers was already written by themselves and did not need a transcription by the author.

The contribution to science made by case studies have often been questioned (Yin, 2018). It is therefore extra important to assure the quality of a case study. Validity and reliability applicability in qualitative research have for long been discussed (Robson and McCartan, 2016, 169). The concepts are more related to quantitative research due to how qualitative research is not aimed to be generalizable in the same manner. A concept that are argued to rather be used in qualitative research is *trustworthiness* involving objectivity, credibility, transferability and dependability (Robson and McCartan, 2016; Bryman and Bell, 2011). To assure quality in this case study a table of how trustworthiness has been taken into account is applied in Table 4 below. The "examples of relevant techniques" boxes are based on how Yin (2018) and Bryman and Bell (2011) suggest the concepts of quality to be ensured in a flexible design research case study.

Table 4. How to ensure trustworthiness in case studies and flexible design research (based on Yin, 2018:55 and Bryman and Bell, 2011:398, modified by author)

Criteria	**Examples of relevant techniques**	**How it is made in this study**
Confirmability	triangulation	using mixed methods for gathering data (interview in person, interview on e-mail) continuous literature review during whole research process
	respondent validation	sent transcripts to interviewees before starting to analyze material
	leave out research effect	been extra thoughtful of objectivity during interviews, especially with case company where author is co-owner
Credibility	do pattern matching	made in analysis and discussion chapter
	address rival explanations	made in analysis and discussion chapter
	use logic model	made in analysis and discussion chapter
Transferability	use thick descriptions	empirical background chapter presenting both case companies and food retail sector
	use replication logic	interviewed more companies until empirical saturation was reached
Dependability	keep records of all phases of the process	interview guide and coding procedure in Appendix 1 and 2

The criteria presented in Table 4 to construct credibility is made in analysis and discussion chapter. A short presentation of how each of them is made is that firstly, the headlines of each chapter in analysis where made out of the conceptual framework so that the reader should be able to make pattern matching along the reading. Secondly, in the discussion chapter the author address rival explanations by mentioning different point of views to statements made. Lastly, logic models are used through the analysis and discussion chapter by giving an attempt in providing a cause-and-effect sequence of events in the perception of the interviewees. Yin (2018) describe how the use of logic models in real-world events are very complex, and the usage in this project is therefore not made to the full extent. But in order to increase credibility, the basis of the concept *logic models* is used by only attempting to describe the perception of the interviewees in relation to the cause and effects of the problem explained in theory.

2.5.1 Ethical considerations

Ethical considerations are necessary to involve when researching people in a real-life context (Robson and McCartan, 2016). In this study, it becomes extra important due to how the research questions involve describing the perception of a relationship between companies. In social research ethical dilemmas are deemed to be context-specific (Robson and McCartan, 2016), so there is no pre-decided guide to follow. The general premise is instead to practice respect and consent to the participants independent of context. To ensure ethical considerations related to the research process all interviewees have before the interview been informed about the purpose of the study, and the real-life interviews also asked for consent of being recorded. This is to ensure that there has been an informed consent to the interview process recommended by Robson and McCartan (2016). To use anonymization of the interviewees in the final research paper is considered to be good practice by ethical research boars according to Robson and McCartan (2016). On the other hand, Yin (2018) argue that it is more desirable to show the identities in a case study, mainly due to how the whole study is easier to review and follow for the reader. Some case companies did only want to participate in the study if they were allowed to remain anonymous as they shared information that could not reach the public for various reasons. Based on this, it was chosen to anonymize all companies – but instead of disguise their name completely they instead were given fictitious names to not completely miss out on all the company specific characteristics.

3 Theory

The chosen theories that serve as a perspective and conceptual framework have their origin in strategic management. The power and dependency relationship between two business actors within same supply chain is explained through Porters Five Forces. Further, theories regarding how to develop a successful partnership between actors within a supply chain is presented to view how the power and dependency can be developed to collaboration and positive synergies. The chapter is summed up with a conceptual framework that is developed out of the above presented theories.

3.1 The context of business behavior

Pfeiffer and Slanacik (1978) state that "*to understand the behaviour of an organization you must understand the context of that behavior – that is, the ecology of the organization*". To get to know the context of within which a behaviour exist is in other words essential for understanding how organizations behave. The perspective of Pfeiffer and Slanacik's Resource Dependency Theory (**RDT**) has according to Hillman *et al*., (2009) almost reached an axiom status in strategic management when approaching interorganizational relations. RDT shares some similar statements as Network Theory (**NT**), which makes them frequently integrated (Hillman *et al*., 2009). This is partly due to how both revolve around a network with a number of actors that cooperate over time (Lee, 2015). The actors can be individuals, groups or organizations and the relationship between each of these actors are different for each single case. What differs is the relationship between actors, which within NT can be seen as a constant ongoing process that have the need for regularly attention in order to be successful (Clark, 2006). There has been critique towards NT for missing out the perspective of the existing multi-level systems of relationships within organization. NT does not consider micro-level organizations relationship with macro-level organizations. By connecting these micro- and macro-level networks it become possible to involve all level of relationships (Moliterno and Mahony, 2011). While NT do highlight the social context of firms the role of power between actors in the network is central for the RDT concept.

3.1.1 Power and dependence

The general view of power within RDT is that *Organization A* wants to reduce the power of *Organization B*, by increasing the power of *Organization A (*Hillman *et al.,* 2009*).*

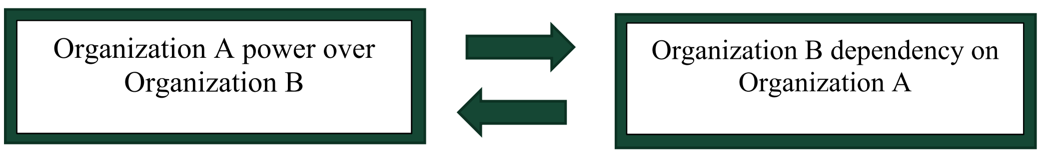

Figure 1. "Organization A's power over organization B is equal to organization B's dependence on organization A's resources" (based on findings by Casciario and Piskorski, 2005:192).

The power and dependency relationship can be adjusted with different tools. For firms to take control over interorganizational power relations, Pfeffer and Slanacik (1978) imply that there are five ways of firms to minimize external dependencies. These are *mergers or vertical integration*, *joint ventures and interorganizational relations*, *have a board of directors*, *use* *political action* and *executive succession*. Hillman *et al*., (2009) have reviewed the usability of these five ways with new research and summarize that they are continual applicable. The reason behind organizational engagement in *mergers* is primary to remove competition, which are similar to how *joint ventures* are used to gain power and access to new resources (Hillman et al, 2009). These are more likely to occur between business that are interdependent like those with a buyer and supplier relationship, where power against external dependencies is result of such actions (Hillman *et al*., 2009). Casciaro and Piskorski (2009) propose that power imbalance and mutual dependence, which are combined into the concept of interdependent in RDT, should instead be held apart due to their opposite effects on organizational ability to reduce dependencies. Drees (2010) adds that new organizational arrangement, resulting from *mergers, joint ventures and interorganizational relations*, differs regarding organizational autonomy and legitimacy. This means that when in the choice of interorganizational arrangement, businesses must consider whether their primary need is to improve autonomy or legitimacy. If the company are more considered about autonomy, less invasive non-owner-based arrangements like *interorganizational relations* are preferable. *Joint ventures* and *mergers* seem to stand in the way of autonomy improvement – while it gives positive preconditions for legitimacy (Drees, 2010, 33).

3.1.2 Porter's five forces

The power struggle between organizations can also be described through Porter's Five Forces Theory (Porter, 1980). The figure below illustrates the constant competition within an industry, but it also describes the dependency between each of the actors within the system. The strongest force or forces plays a crucial role within the market from a strategic point of view, but there are different forces that shapes competition in different markets (Porter, 1980, 31).

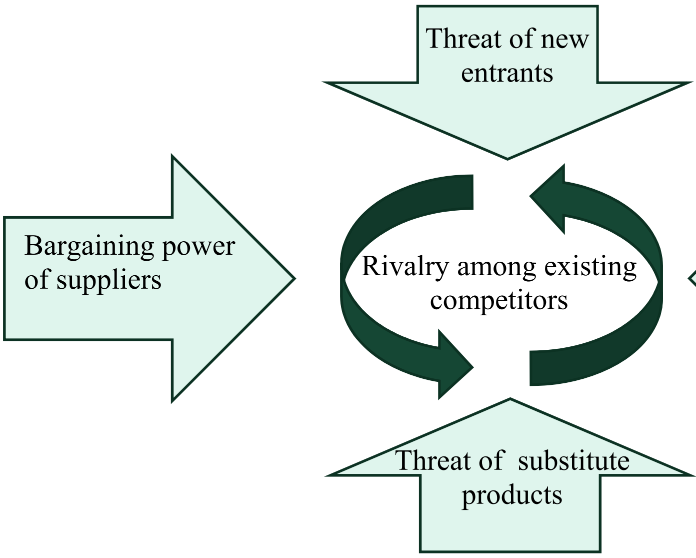

Figure 2. Porters five forces, the external threat within an industry or market (Porter, 1980:31).

From a consumer perspective, price sensitivity rises if a product that is purchased are undifferentiated or expensive relative to consumer income. This is equal to the power of wholesalers and retailers – despite that retailers can gain significant power over manufacturers if they can influence consumer purchasing decisions. At the same time, wholesalers gain power too if they can influence the decision regarding which products retailer choose to buy (Porter, 1980, 39). Porter (1980) means that these conditions are largely the inverse regarding bargaining power of suppliers. The supplier group will be able to have a higher influence on prices, quality and terms if the group are dominated by a few companies that are more concentrated than the market it sells to. On the contrary, differentiation and changing costs do increase the supplier power by minimizing the possibility for buyers to playing out one supplier against another (Porter, 1980, 40).

Suppliers and buyers depend on each other to be able to continue business as usual. Porters five force model illustrated in Figure 3 visualizes the outside threat and competition between all actors in an industry or market. For business to stay competitive in their industry the choice of strategy is deemed to be essential (Porter, 1980; Mintzberg and Wiley 1985; Lindvall 2011). Strategic management is also argued to be central when planning business development (Gielens *et al.,* 2020).

3.2 Sustainable strategic positioning

A shift for a corporation from a local to a world market affects the understanding of needs for a strategic position fundamentally. When market becomes global, barriers for competition are slowly removed (Porter, 1996). Historically, the concept of business strategy is often referred to as an analytical process with action plans for long-term goals with the aim to receive competitive advantage (Mintzberg and Wiley, 1985). How companies relate to the concept of competition in their business strategy is no longer only done by creating competitive advantages between single businesses. The businesses that create strong market positions are instead those with a sustainable strategic position (Porter, 1996). To outperform competition one must establish a difference that is preservable. This is often easier to do for new entrants with no history. However, all company's way of developing sustainable strategy must be determined by the ability to find new systems of complementary activities that make the sustainable strategy an advantage as-well (Porter, 1996).

3.2.1 Trade-offs

Porter (1996) implies that businesses that are being forced to change strategy are the once's where major structural changes have occurred in the whole industry. The decision-making process where a producer has to decide between to produce private label products for grocery retail or not, is according to Galizzi *et al*., (1997) strategically based, but to get a sustainable strategic position there need to be trade-offs with other positions. Trade-offs means that activities are contrary – more of one thing forces less of another (Porter, 1996). According to Porter (1996), trade-offs arise for three reasons. *Inconsistencies in image or reputation* – meaning that a company that is known for delivering one value can create a lack of credibility and lower reputation if it delivers another kind of value that are inconsistent with their origin value. *Trade-offs arise from activities themselves* – meaning that different positions naturally require different skills, management systems, equipment. *Trade-offs arise from limits on internal coordination and control* – to prioritize and spell out what way the company chose to compete in. If a company tries to deliver all values to all customers there is a huge risk for confusion for employees and customers. Positioning trade-offs are universal for competition and strategy since it implies what *not* to do (Porter, 1996).

3.2.2 Social perspective and governance

A decade after the presentation of the five forces, Porter and Kramer (2006) argue for an integration of a social perspective into company's strategy framework due to the lack of focus on the points of intersection between businesses and civil society. The mutual dependency between corporations and society implies that both business decisions and social rules must follow the code of *shared value*. This means that choices made must benefit both sides – if either benefit at the expense of the other, this temporary gain for one of them will undermine the long-term prosperity of them both (Porter and Kramer, 2006). There are possibilities to miss important opportunities as growth, innovation and social impact at scale if companies do not track the interdependency between social and business results (Porter *et al.*, 2012, 2). To reach a sustainable strategic position the old view that modern liberal democracies consists of state, market and civil society needs to be adjusted (Glasbergen, 2011, 1). The state, market and civil society's interdependences have been shown through a multi-actor context where each of them is imagined taking responsibility for public issues. This is referred to as *governance* (Glasbergen, 2011). This shift towards governance has influenced sustainability management. For this, Glasbergen (2011, 2) argues that partnership is the managerial response to the ethical idea of societies progress, since partnership challenge the strict separation of tasks between public and private actors. This debate around public and private responsibilities have changed the traditional hierarchical order between partners to a horizontal relationship. Glasbergen (2011) means that there is a possibility to unite public and private responsibilities to a new management strategy for sustainable development.

3.2.3 Partnership

Glasbergen (2011) presents the idea that market mechanisms can be used to address more sustainable practices through partnership. Partnerships are studied through three aspects that are taken up by three different interests. *Organizational studies* mainly address the creation and development of new practices which is translated into terms of possibility of intersectoral collaboration. This incorporates partner satisfaction, improved partner relationships and the development of shared intentions (Glasbergen, 2011). *Policy studies* do address the external effects of partnerships and focus on the interactive structure and process where the partnership operates. *Political science* has a broader view on governance and focus primary on the consequences of partnerships becoming parts of the configuration of societal decision-making structures (Glasbergen, 2011). Through his ideas, Glasbergen (2011) created the model *The Ladder of Partnership Activity* which aims to understand the partnership process, containing a gradual shift from internal- to external focus. *The Ladder of Partnership Activity* is presented below in Figure 3. The ladder consists of five core levels based on the assumption that the actors re-construct and develop their social relationships to create new managerial practices. This process is interactive where collaboration equals different partners agreeing to implement more or less made agreements to support a more sustainable future.

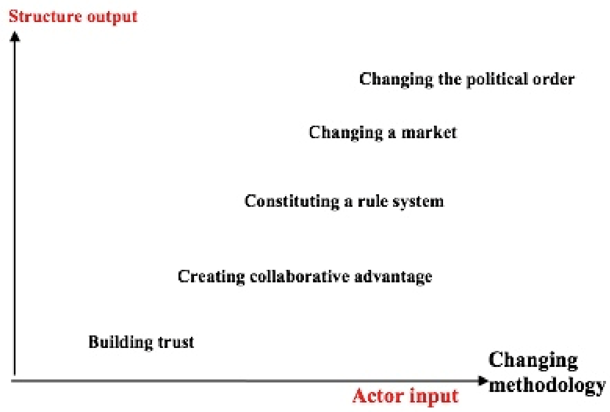

Figure 3. The ladder of Partnership Activity (Glasbergen, 2011:4).

As illustrated in Figure 3 the first level, *trust,* is an exploratory phase to investigate the pre-conditions and attitudes for each party to start a partnering process. The goal from this level is transformation from an adversarial interaction of distrust and competition to a trustworthy environment where all parts can get added value. Trust is divided between internal trust and external trust. Internal trust builds on the belief that the partner has positive intention and that their competence is valuable for the up-coming partnership. External trust refers to how the reaction from external parties, like broader networks for each party, is expected to be positive. To gain this external trust an open communication process with relevant external parties for both partners is essential (Glasbergen, 2011).

The second level, *collaborative advantage,* is a formation process where each part has to know that they can achieve something from the other that would not be possible to achieve alone. The distribution between benefits and costs is also important – the balance of how much each partner gains in terms of benefits and risks needs to be perceived as similar. If one partner finds the other one to receive greater benefits to a lower risk a sense of unfairness will damage the trust (Glasbergen, 2011).

The third level involves creating a *rule system.* At this level the collaborative outputs are formed and agreed upon. A new social contract between partners that specifies their formal rules of the partnership is made. These rules involve both internal aspects, as mutual obligations, and external aspects, as how the partnerships interact with other organizations. How the partnership deal with decision-making processes, monitoring and enforcement is also deemed to be important part of this rule system. There might be differences in how partners face the process of contracting and how some might see trust as a substitute for formal contracts needs to be taken into account. Glasbergen (2011) mean that if trust levels do substitute contracts, the contract might be less specific but are still necessary to signify the partner commitment. This step of *The Ladder of Partnership Activity* is claimed to change the process of partnership fundamentally due to the formal commitment and to what degree both parties lives up to them (Glasbergen, 2011). The fourth level, *change market*, refers to the activity of implementing the rule system in the chain. Here it is important for the parties to gain legitimacy from others within the chain. To implement the agreement to a broader scale is possible, but not mandatory. This new partnership has the possibility to create incentives for transformation from conventional chain to a sustainable chain. The value that is created is also what changes the nature of the chain – a sustainable chain focus on both economic profitability and expand the concept of value of ecological and social issues while a conventional chain only focuses on the first. This new practices within the chain are a part of the economic struggle for market power due to how they shut out some sustainable aspects while serving others. This has a high influence on the governance structure of the chain's entry barriers and value distribution (Glasbergen, 2011). The last level, *change political order*, is seen as an unintended outcome that is the consequence from well formed partnerships (Glasbergen, 2011). Here questions to be asked is if and how partnerships influence governance in the society, and if the ability to institutionalize a new way of collective accountability for sustainability issues.

Glasbergen (2011) means that *The Ladder of Partnership Activity* can be used as a model for designing partnerships (Figure 4) . For the model to be well applicable, involved partners should address following three criteria's: *significant environmental benefits, significant business benefits* and *potential to create a model that other companies could follow as-well*. It is preferable to choose partnerships within large companies, or market leaders with high purchasing power and influence to change practices of a market (Glasbergen, 2011, 11).

3.3 Conceptual framework

A conceptual framework provides a link between the theory and analysis of empirical material. This is illustrated below in Figure 4.

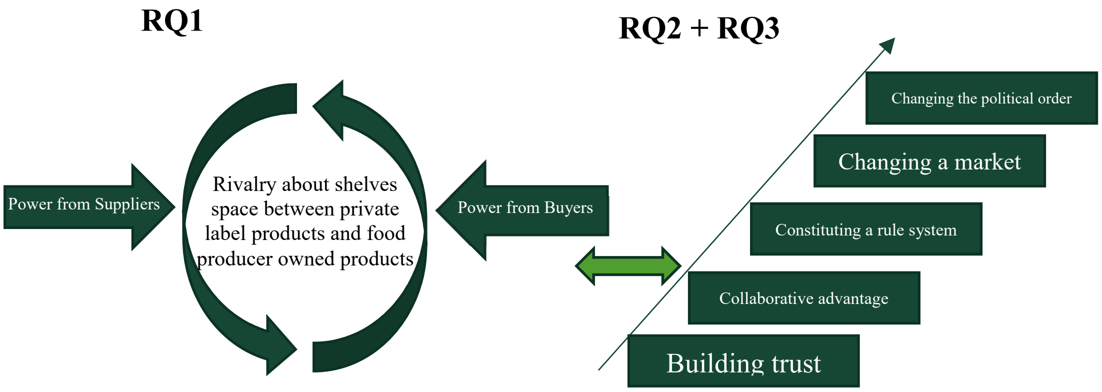

Figure 4. A conceptual framework for analyzing empirical material.

The conceptual framework provides a structure for how the empirical material was analyzed. For RQ1, with inspiration from Porters Five Forces model the power relationship between suppliers and buyers in food retail is analyzed regarding their impact on shelves space for private label products and food producer owned products. Due to the aim of this study, the *power of suppliers* and *power of buyers* will be the central and only aspects adapted from Porters five forces model further on. For RQ2 and RQ3, *The Ladder of Partnership Activity* is used. This model is originally aiming to describe an ongoing process. In this study, *the Ladder of Partnership Activity* is instead used as a general frame for presenting the producer perspective of which factors can contribute to new ways of collaboration between food retail and small food producers. At last, the connection between the two concepts were analyzed and summarized.

4 Empirical background

Chapter 4 presents background information about the empirical cases and the market in which they occur. First, a short presentation takes place of food retail and its actors. Second, the case companies and their way of doing business are presented. Each case companies supply chain is also illustrated to ease for the reader to understand how each company operate in the food chain.

4.1 Food retail

Swedish food retail is an important part of the Swedish economy with its almost 100 000 employees (Axfood, 2023a). The market concentration is significantly high with its five actors, ICA, Coop, Axfood, City Gross and LIDL, in comparison to other countries which implies being of oligopoly characteristics (Food in focus, 2023). Three of these actors account for the main part, even though the exact number of market share is not a general truth accepted by each market actor. Bern *et al.* (2018) mean that food retail ICA, Coop and Axfood account for 80-85% of total sales in the grocery sales, while Axfood (2023a) reports that the three grocery chains together has 90% of market share. Bern *et al., (*2018) explains this with that there might be strategical reasons behind how each company define and calculate their own market share. According to DLF, which is an independent organization for food retail suppliers, Ica, Coop and Axfood has 89% of the market together which is illustrated below in Figure 5 (DLF, 2022). One important aspect to add is that City Gross is co-owned by Axfood since 2021, even though they are separated in the DLF (2022) based illustration below (Axfood, 2023b).

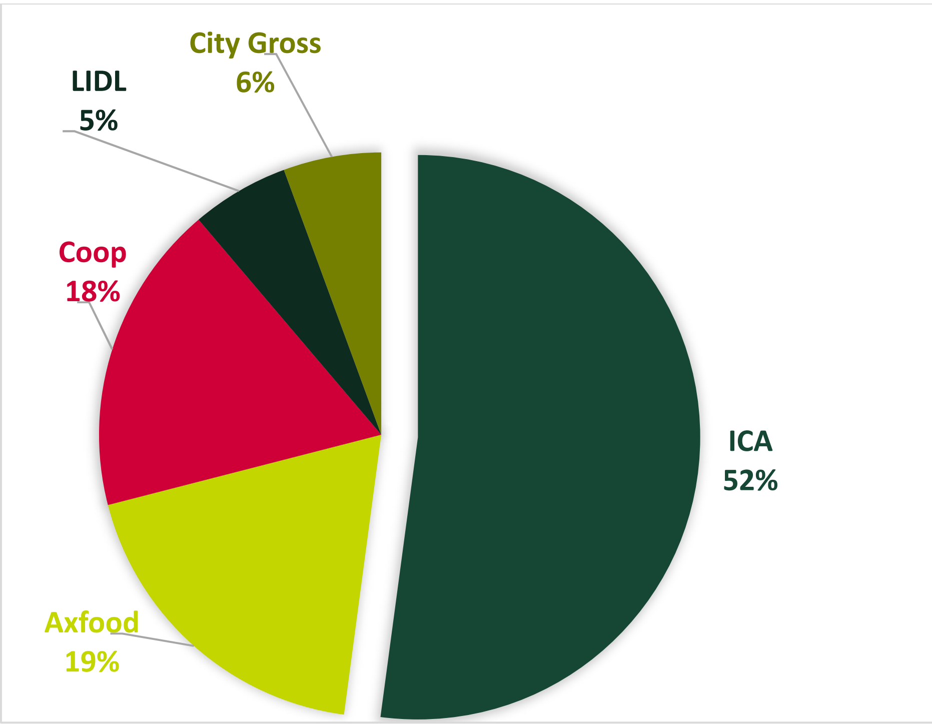

Figure 5. Distribution of market shares between actors in Swedish food retail 2021 (DLF, 2022:1).

Even though the three largest actors have the similarity of being listed on the stock market, what largely separates them is their ownership-structure. ICA Group AB has, despite their main business in food retail, also companies in bank, real estate and pharmacy sector. The business group has de-centralized their power in food retail through individual franchising companies, making every ICA retail store its own company (ICA, 2023a*)*. Axfood, on the other hand, is also a business group, owning several food retails, online services (*MatHem*), pharmacy (*ApoHem*). They do also have a company that is responsible for assortment, stock and logistics for the whole group (*Dagab*) (Axfood, 2023b). Coop differs from ICA and Axfood through its cooperative ownership structure. The cooperative is divided into 28 consumer associations through geographical regions (Coop, 2023c). In Table *5* this is presented together with each food retails private label brands and other information about their business operations.

Table 5. The three largest food retails business operations (Axfood, 2023b; 2023c, Coop, 2023c; 2023e, Ica, 2023a)

Food retail	Ownership structure	Food retails	Number of food retail stores	Other business activities	Food private label brands
Axfood	Public limited company	**Majority owner of…** Willys Hemköp Handlar'n Tempo Matöppet Eurocash **Co-owner of…** Mathem Citygross	1000	Pharmacy Restaurant Restaurant wholesaler	Garant Eldorado Premier Gastrino Redo
ICA Group AB	Private limited company	Ica Rimi Baltic	1954	Bank Real estate Pharmacy	ICAs egna varor ICA I love eco ICA gott liv ICA selection ICA Basic
Coop	Cooperative	Coop	800	none	Xtra Coop Änglamark

Despite being of different ownership structure these three food retails have in common talking about sustainability aspect of their operations and products. A short presentation of the available sustainability information for each food retail is made below.

Axfood

Inspired by the government's Food Target 2030, the management at Axfood has produced an own sustainability report where they present 110 points that according to Axfood are important for a more sustainable 2030. The suggestions revolve around the five central *areas sustainable consumption*, *strengthened added values for Swedish food*, *countryside in focus*, *a fossil-free Sweden* and *sustainable production within the planet's limits*. One suggestion is that VAT should be reduced or abolished on all sustainable food to increase incentives for producers. Another suggestion is to increase knowledge and research, which further contributes to strengthened innovation in the entire food chain. The authors of this report describe that producers have difficulties converting their added value in environmental impact, climate emissions and animal protection into real competitive advantages. At the same time, it is described that consumers' understanding of Swedish added value is crucial for competitive Swedish food production and that it is therefore also important to increase (Axfood, 2023a).

ICA
ICA Group AB do shed light on local initiatives taken by their retail owners. The initiatives arise from a perceived responsibility to take social commitment and varies from collecting money for research to enabling kids to participate in summer camps (ICA, 2023b). One of these initiatives involves the producer of the products sold in store and were made by ICA Kvantum Flygfyren in Norrtälje. Maria Folkesson, responsible for marketing at ICA Kvantum Flygfyren, arranged this to show their customers how much hard work that lies behind the locally produced food in their store. She mentions that in order to receive more small producers it is important to show an engagement in this in the close area (ICA, 2023c).

Coop
Coop is repeatedly marketed on their website as the environmental aware actor in the market which has the aim to be an active part where food, sustainability and health collaborate (Coop, 2023c). There is a wide range of activities involved in Coops sustainability documents where ecological food, vegetarian food, Swedish and locally produced meat, healthy choices and food waste are the five areas mentioned first (Coop, 2023d). Today, 87 percent of all meat sold by Coop is from Swedish producers (ibid). To sustain the Swedish and locally produced meat Coop has, among other things, sponsored twenty young farmers with the purchase of new breeding bulls. The aim is to support the long-term work of securing a Swedish production and supply of meat (ibid).

4.2 Case companies

The potato chips factory
Interviewee role in business: CEO and co-owner
The potato chips factory produces potato-chips in the southern part of Sweden. The company was founded in 2018 but sold their first bag of chips in 2020. The company has three owners and in total five employees. The company's key customer is food retail, but the largest amount is not sold directly to food retail but through wholesalers. The company has four wholesalers across Sweden but do also sell their products directly to food retail. With a fryer that runs on gotlandic biogas the production is mentioned to be 100% fossil-free. Despite that, all food waste from production is transported to a bio-gas plant and made to new biogas, creating a circular system.

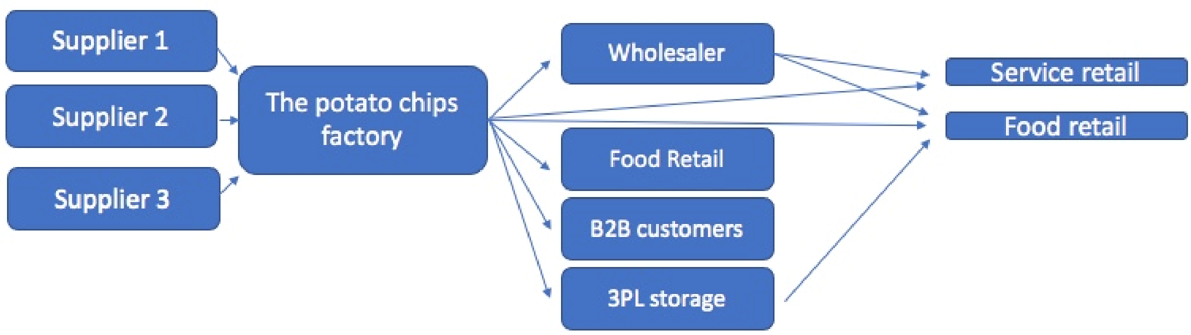

Figure 6. The potato chips factory's supply chain.

The potato chips factory has different suppliers for different materials. The main raw material, potatoes, is bought from two farmers nearby the production factory and are delivered directly from the acre to the company's warehouse, where it is stored during the main part of the year. The company has customers in both food retail and service retail, which receives the product through different intermediaries as presented in Figure 6.

The Farm

Interviewee role in business: Co-owner

In agricultural sector we find the farm, which is owned and driven by three persons, who in turn has one farm each. They have collaborated since 2009 through the company, but each one has independently been in the sector for over 15 years before the collaboration started. Through the company they stand on several legs by together having grain cultivation of lentils, oil-plants, wheat and rye as well as meat production with cow and lamb. All parts of the production are KRAV-certificated. Being a multifaceted actor in the sector the working force consist of four full-time employees. The supply chain for the company's products differ dependent on the product character.

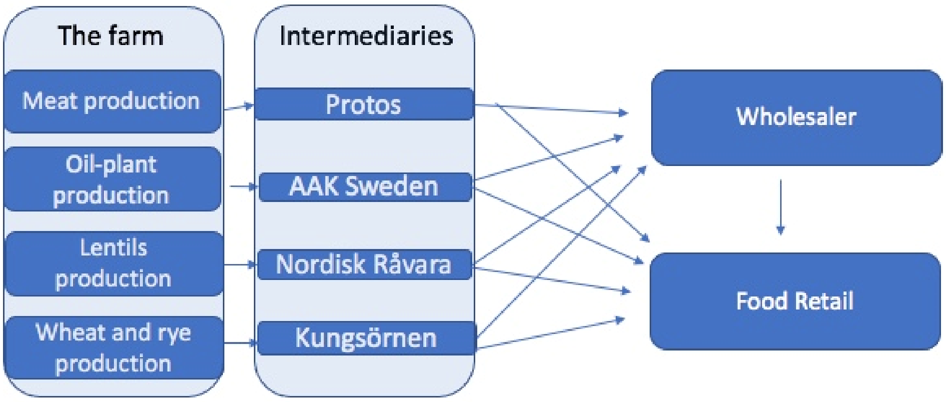

Figure 7. The farm's supply chain.

What is similar for all products is that they are forwarded to food retail through intermediaries. These intermediaries are all large businesses that has well-known labels in food retail as *Kungsörnen* and *Smak av Gotland* (Protos). Amongst the intermediaries, some of them sell both their own brands and private label brands. Protos for example, sell meat under private label brands to food retail while also selling Smak av Gotland as their own brand.

The ice-cream factory

Interviewee role in business: CEO and co-owner

The ice-cream factory has been operating since the early 1980's when two founders started to produce ice-cream. The company received new owners in 2010 who made a full rebranding of the company's trademark to a sustainable focus, where all additives from the product recipe where removed and exchanged to organic and eco-certified raw products. The product lies in the premium segment and is sold through wholesalers, directly to food retail and B2C. The company has a total of six employees and operates all year around with its peak season in the summer months.

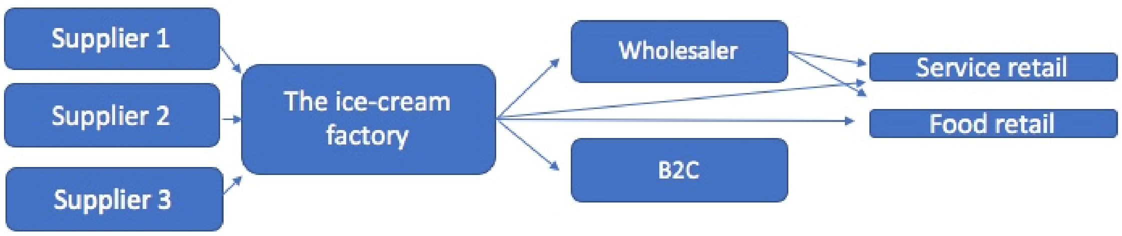

Figure 8. The ice-cream factory's supply chain.

The B2C sales as presented in Figure 8 involves two points of sale. The ice-cream factory has a store in a nearby city that is open during the summer months and also sales in direct connect to the factory. In the latter place, products that cannot be sold in food retail due to different reasons is sold to a lower "factory price".

The dairy farm
Interviewee role in business: CEO and co-owner
The dairy farm is a family business that has been passed on for three generations. The company has some land cultivation, mostly for the making of food for the cows, but the primary production are the milking cows. The dairy farm consists of about 120 cows, which are solely taken care of by the family members and also one external employee from time to time.

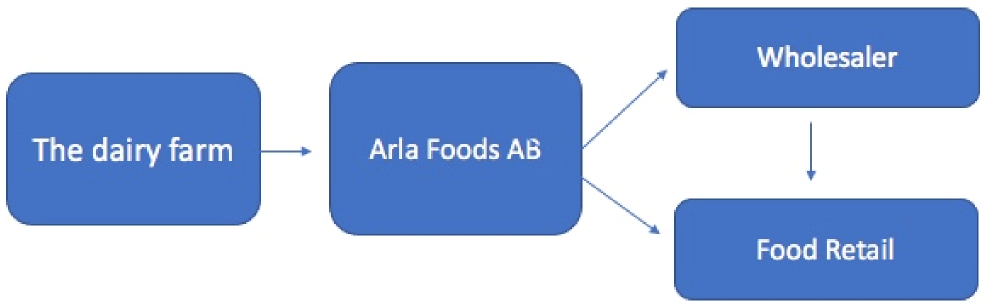

Figure 9. The dairy farm's supply chain.

The dairy farm has one intermediary in the dairy company Arla Foods AB, which after refining of the milk in their production premises sells different kinds of dairy products further to wholesalers and to food retail. These products are both of Arla Foods AB owned brands and as private label brands owned by food retail.

5 Empirical results

In chapter 5, empirical results are presented through six different themes. The themes were the foundation of the interview guide which were decided upon through an overview of the problem background, problem discussion and theory chapter.

5.1 The context of business behavior

The interviewed case companies do all have different supply chains which requires different strategies for business development. The farm and the dairy farm sell their products to intermediaries that firstly packages or refine the products before it reaches food retail. The potato chips factory and the ice-cream factory on the other hand sells their product directly to food retail, but also through wholesalers which then sells them to food retail. The interviewee from the potato chips factory explains that it is a strategic choice to involve external partners such as wholesalers to reach food retail. The plan is to operate at these preconditions until they have financial resources to conceive central agreements with food retail, which gives them the possibility to only sell their products directly to food retail warehouses. The interviewee from the ice-cream factory describes how they have also chosen to involve external partners to reach new consumers with their products, but do not explain this to be a strategic choice towards receiving central agreements but rather to easier reach a higher number of food retail stores than they have resources to do themselves. The interviewee from the farm mentions having experienced a supply chain where they sold directly to food retail as-well, but this is according to them been rationalized towards the intermediaries that pack and label their products having the sales responsibility instead. The interviewee from the dairy farm do mention their supply chain to be a matter of course due to how the milk from their cows needs to be refined before reaching the customers, and that they have not made an active choice but simply that this is how their industry works.

5.1.1 Business strategy

What is similar to all interviewees is how their businesses have changed their strategy the last year or are in an on-going process of changing their strategy right now. The interviewee from the ice-cream factory start the interview by mentioning that they are just in the middle of such a process due to a dissatisfaction with food retail.

> *"We have actually given up on the thought of a functioning collaboration with food retail and will start to withdraw our products from food retail successively with start in September this year" (the ice-cream factory).*

This change in strategy is explained to be of multiple factors which together has made them finalize in a decision of how change is necessary. Firstly, they mention having limited resources for sales work. Secondly, it is mentioned that food retails power in product exposure do negatively affect the company's products, while there is an ongoing price pressure exposure by food retail of the products at the same time. The strategy of sales has due to this changed towards a focus on other markets.

> *"We will focus on markets were premium products do not have the same price pressure, for example our own sales" (the ice-cream factory).*

The farm has also changed their business strategy, but this is according to the interviewee from the farm been due to an experienced change in demand from consumers. While earlier the largest part of production has been of grain as rye and wheat which is refined to flour, the production of lentils is now increasing. The interviewee from the farm mentions that this change is a huge choice, explaining that the production has been quite similar despite this change over the last years of operation. The interviewee from the potato chips factory, on the other hand, says that they have not changed their strategy since start but do also mention that they have noted that much of the margin goes to the wholesaler.

> *"We have noted that much of the margin disappears to wholesalers, to an extent which is not reasonable, and therefore we have started to add some own sales" (the potato chips factory).*

To start with an own salesperson who distributes the products directly is not mentioned by the interviewee from the potato chips factory to be suitable for all their markets. The geographically areas determined are therefore the ones that are profitable in terms of distance between stores and number of customers in the area for example. The interviewee from the dairy farm mention how their farm, who has been passed on for three generations now, used to consist of cows suitable for meat production. This changed for two years ago, when the owners of the company decided to change the production towards milking cows instead. The decision was not based on any external events in comparison to the other case companies, but simply due to how that sort of lifestyle that is followed with having milking cows seemed to suit them better.

5.1.2 Power and dependence

While the interviewees from the potato chips factory, the farm and the dairy farm mentions that one or a couple of their customers are extra important to them, interviewee from the ice-cream factory do refer to the end-consumer as the most important customer who also has the most power over which products are sold in food retail.

> *"... one should not forget that the end-consumer might have the largest power and they have made us realize that our premium product is not as demanded in food retail" (the ice-cream factory).*

The interviewee from the ice-cream factory then refers to their own sales to be extra important due to their target group of consumers specific buying behavior.

The interviewee from the potato chips factory explains that their primary customers are the ones ordering large volume of products referring to food retail but also one other customer which alone stands for about a third of their yearly sales. The interviewee from the dairy farm, on the other hand, do refer to the dairy intermediary as their primary customer but do mention that food retail is the most important part of their supply chain. The interviewee from the farm do in opposite refer to their intermediaries as extra important, since they are the ones presenting the food retail demand. Related to their changed business strategy towards increased cultivation of lentils the intermediary that sells the product to food retail is mentioned to be essential.

> *"If it was not for them, we would not cultivate lentils at all. It is them who is the driving force when talking about demand, and they do also help us in many ways" (the farm).*

The interviewee from the farm continues this reasoning by explaining about how they perceive the role of power and dependency with their customers.

“you can say that they (i.e. food retail) do have the power to set the price. The price must be high enough so that we can afford the cultivation, but since the harvest depends on so many aspects that we cannot control to the fullest, we are still the ones that takes the risk in the lottery… they do always know what they buy our product for – but we have not got a clue what the net value of our cultivation is before we have harvest and see what volume we have got (…) So we do always take the largest risk” (the farm).

The interviewee from the potato chips factory do tell their perception of this topic by saying that they actually do not think that they have any power against their customers. The power they have is to say how much their products cost and how much they can deliver – and the rest is up to their customers.

“I don’t even think that they (i.e. food retail) have reflected upon it since they know that it is them who decides everything in the end. It is completely their decision if they want to order our products or not – we cannot influence which products they sell at all” (the potato chips factory).

Interviewee from the ice-cream factory do explain that the large power food retail has lies mainly in how they are the ones deciding on product exposure in the stores.

“…they are the ones deciding, especially on exposure in food retail which is essential for the sales of the product” (the ice-cream factory).

The interviewees from the potato chips factory, the farm, the dairy farm and the ice-cream factory all describe being dependent on food retail for continuing their businesses as usual. The interviewee from the potato chips factory do think that the perceived dependency for producing companies are different if you have central agreements with food retail or not

“I think that those who have central agreements with food retail do perceive having less power (…) or being more dependent since it is often a large volume so therefore, they are prepared to offer a bit of their own margin than us that has more smaller agreements” (the potato chips factory).

Interviewee from the farm and the ice-cream factory, on the other hand, do not mention central agreements in relation to the perception of dependency on food retail. Neither do the interviewee from the dairy farm, who points to the dependency to lie in how the food retail is where the main part of their dairy products to be sold.

“… and then we are completely dependent on food retail since they are the dairy’s largest customer” (the dairy farm).

Similar to interviewee from the dairy farms saying of how the dependency to lie in food retail to be their intermediary’s largest customer, interviewee from the farm mention the dependency to lie in having only one buyer and the following price pressure that comes with the situation. Interviewee from the ice-cream factory do also mention price to be central when discussion dependency on food retail, and how the price pressure experienced is related to the lack of product exposure in stores too.

5.1.3 Relationship

When answering questions regarding how the relationship with food retail is, a perceived distance between the parties is mentioned to exist for the interviewee from the farm, who also mentions a wish to have a closer contact with food retail.

> *"The relationship… it is a bit far away in some ways (…). I would appreciate having a closer contact with food retail. It would be fun if it were them who called and bought our product directly. I know that this was possible a couple of years ago through producer-groups, where 25 producers delivered products together to Coop and Hemköp. This has disappeared during the last years and today we only talk with the ones who sell our products to food retail" (the farm).*

The interviewee from the potato chips factory do also perceive a certain distance but explains this with how producers that do not have a central agreement with food retail is less appreciated, since it offers more work for food retail in order to sell the specific products in their store. This extra work for food retail makes them demand a larger margin on these products than on products they buy through central agreements, creating a tougher competition due to the different presumptions. This tougher competition between products has also been noted by the interviewee from the ice-cream factory who has given up the idea of having a well-functioning collaboration with food retail. The dairy farm says that they do not have a relationship with food retail, it is the dairy's task.

> *"I would say that we do not have a relationship with food retail at all since the dairy is our customer. Our primary focus is to make the dairy satisfied with our deliveries by having healthy cows who makes "good milk"… But on the other hand we are like 100% affected by what happens in food retail" (the dairy farm).*

The interviewee from the dairy farm explain that the relationship just lies in the dependency on food retail, and that there is no other contact between the parties at all. Interviewees from all four case companies explain that there are no activities occurring that can be categorized as actively working on improving the relationship with food retail.

> *"the food retail is really disqualified in that area" (the ice-cream factory).*

> *"No, I don't think so… but well, they often ask us to demonstrate our products in store, so that might be some sort of effort to improving their relationship with us. But if you want to be harsh, that sort of activity is just something that increases the sales so…." (the potato chips factory).*

> *"I do not experience a will from food retail to do so in any way actually" (the farm).*

> *"No i have not seen any initiatives from food retail in improving the relationship with us. Like I mentioned earlier we do not have a relationship with them except being affected by everything that's happening with them" (the dairy farm).*

There is no initiative perceived from food retail by neither of the four interviewees of food retail. None of the interviewees from the case companies mention any initiatives taken by themselves to improve relationship with food retail either.

5.1.4 Private label

The interviewee from the ice-cream factory says that private label products are not so appreciated of them as producers, and even though private label products are not the only or the largest reason behind their withdrawal of products from food retail – their existence are still involved in the decision-making process of doing so. Interviewee from both the potato chips factory and the farm express's that private label products can be both positive and negative for food retail and food producer development. Interviewee from the potato chips factory mentions that it can be positive for producers who needs increased production, and also that it is positive from a sustainability point of view if the production of the products stays in Sweden. The latter opinion is also mentioned by interviewee from the farm, who involves this in a larger picture regarding product origin in general. The interviewee from the dairy farm do only discuss private label products in terms of how they pressure the price paid from the dairy, and the negative effect this has in the long-term both for farmers and for Swedens population as a whole.

> *"The increase of private label products hit us really hard. I am not sure if the consumers really understand how much the choice in store matters and what the consequences are for choosing a private label dairy product before a product with the dairy's brand. Private label brands favor food retail instead of favoring the farmers." (the dairy farm).*

The interviewee from the dairy farm means that the increase of private label products lowers the margin to the farms. When the consumer buys a private label product, often with a lower price than equal products with a brand label, the interviewee from the dairy farm means that fewer crowns per liter milk goes to the dairy. Since it is the dairy that is the primary customer who pays for the milk to the dairy farm, the dairy gets less money to pay with.

> *"I think we are the first in line to notice this development since we have a relatively short product cycle. I mean the milk do not have long expiry dates, not even dairy products that has been refined to cheese or other, and the pay we get from the dairy is directly affected by lower priced paid in store. So I think that we as dairy farmers notice this a lot earlier than meat farmers for example, like we were before. Back then we only sent cows to the slaughter for like one or two times per year. Now we sell milk every day..." (the dairy farm).*

The interviewee from the dairy farm explains how they are the ones who notice the results of the increase of private label products first due to the dairy productions short cycles and following short expiry dates of dairy products.

Private label and product origin

According to interviewee from the potato chips factory, their product category in particular, potato chips, they do not have a major concern for private label products in comparison to other food categories.

"My perception is that consumers of potato chips are a bit… more label aware and that private label product has not been big enough. (…) They are often made in the Netherlands if they have private label products of potato chips, and I think it makes it harder to compete with Swedish producers." (the potato chips factory).

Interviewee from the farm mentions the effect of private label products to depend on where the raw material comes from. If it is a Swedish raw material, the effect is not so notable in the larger picture. But if food retail increases the share of imported raw material to its products, the risk is that Swedish production in total will decrease.

"It is hard to produce agricultural products at the same terms as in Brazil or the Netherlands for example… The large risk is that the demand of Swedish food decreases in the long run. It actually scares me a bit that this is possible – is it a political choice or is it food retail who decide this?" (the farm).

The interviewee from the farm continues the discussion with how this further affects Swedish farmers, open landscapes and the importance of biological diversity in nature.

"if the politicians do not actively join this problem with the aim to keep Swedish agriculture and food producers with some sort of regional politics, then all agricultural companies will be reduced and the number of animals as-well." (the farm).

The discussion is continued with a description about how the responsible lies on food retail. But it there is a mentioned knowledge from the interviewee from the farm about how this is not crystal clear for everyone, and that some says it is the consumer who has the total power over what products food retail has in store.

"I think it is food retail. They are the ones who choose what we are eating. I think it is more like that than the consumer itself choosing. Some say that consumer has power over this, but I think if they have… it is on very specific products. My opinion is that food retail determines what we buy in store. To a large extent." (the farm).

The interviewee finalizes the reasoning about responsibility with again connecting this the politician's role, and how they can or cannot interfere in this situation. The interviewee from the dairy farm also mention the importance of Swedish production by adding the perspective of food preparedness in a crisis situation.

"We need to reconsider what we spend our money on. If we want to be able to buy Swedish food produced also in times of crisis, we need to buy that food today too." (the dairy farm).

The interviewee from the dairy farm continues the reasoning with the accuracy of Swedish food by saying that food has been too cheap in Sweden for a long time, and that there needs to be a change regarding how price in store is not correlated to the actual cost for production.

5.2 Sustainable strategic positioning

5.2.1 Trade-offs

The value that is delivered to the producers' customers are for all case companies related to sustainability. The interviewee from the potato chips factory describes their value offer to be a product that is sustainable produced with a local connection to the geographical place where it is produced. The value offers significant for the farm's products are explained by their interviewee to be connected to the product certification KRAV. KRAV is, according to the interviewee from the farm, the most sustainable production in terms of energy, artificial fertilizer, animal care and other. The interviewee also describes how there is a constant debate about who in the food chain that is going to market these value offers created by the specific sustainability label (KRAV).

"A lot of times it comes down to the idea that it is KRAV as organization who is going to market the added values by KRAV products. As a producer… I think it is quite mediocre. Because they usually respond to this by saying that food retail can market this themselves. And that never happens. So then the debate continues." (the farm).

The interviewee from the dairy farm mention that the value their milk has is a contribution to continuing of Swedish farms and Swedish food production, and all the positive outcomes that these operations has to society as a whole.

"The Swedish animal laws, countryside, nature and all…it has a value that we contribute to by having our cows and our farm. And that value can also keep on existing thanks to the products that is made out of the milk from our cows." (the dairy farm).

The sustainability aspect mentioned by the interviewee from the dairy farm lies in how their products contribute to the nature and a living countryside.

5.2.2 Shared value

The interviewee from the farm do continue with mentioning that the main value their products deliver is not the same value offer that is delivered by food retail in general.

"No it is not the same we offer. But KRAV try, we can say at least. They try to connect our products added value to a perceived value for the consumer in store. KRAV do work with that – but food retail does not work with that at all. That is my opinion at least." (the farm).

The interviewee from the ice-cream factory explains that their value offer is that their premium product is made solely by organic raw materials but continues with describing that this is not something that food retail is making any difference for in store in comparison to other products, which creates a price competition from products without the same sustainability production. The interviewee from the potato chips factory do think that their value offer benefits food retails value offer by adding a product to a category that food retail does not have themselves.

"Yes, I think we bring something among these other brands by adding another "leg" for food retail to stand on. Like…we are in a specific category that has characteristics that food retail can gain by showing off, if you understand what I mean? Our products sustainability approach looks good in the shelves and this creates an added value for food retail in the perception of their customers" (the potato chips factory).

The interviewee from the potato chips factory means that in thanks to their specific products, food retail can offer a product that both widens the category and adds a sustainable product to their offers.

The interviewee from the dairy farm is of opposite opinion, questioning how there can be a shared value between both partners' products when there is a price pressure amongst them.

"No I do not think we and food retail has some sort of shared value at all. I mean their private label products do compete with our products – pressuring the price. So I do not see any sort of shared pro's in product value at all actually." (the dairy farm).

How the private label products press down the price for the interviewee from the dairy farm's products are mentioned to be the reason for not finding any shared value between the parties and their products.

5.2.3 Partnership

To create the best way of collaboration interviewee from the farm mentions that food retail and small food producers needs to find the common cause, and that both parts need to communicate and find the common benefit from it.

"understanding, finding the common benefits… and that you… yeah I think that one new partner needs to be added – or that you are a part of each other's organizations in some way. So… more direct communication, maybe we can skip the warehouses and intermediaries? Since they have become a middle-hand that only think about themselves anyway." (the farm).

The representative of the potato chips factory discusses the best way of collaboration by comparing way of working that would be most cost-effective.

"Most cost-effective, and what everyone wants, are the central agreements (…) But also, you can sell to different levels too. I think both ICA and Coop has the possibility or that. Like only sell to Stora Coop stores or Maxi-groups… but either way it comes down to that you have to prove your products sells in order to even start to sell them. And I mean... that is quite reasonable from my point of view." (the potato chips factory).

The interviewee continues with mentioning how it is still the producer itself who needs to finance the advertising even after receiving a central agreement with food retail.

"I guess that is just the way it is… the cheapest and most cost-effective way to reach food retail with your products is through central agreements. But regarding advertising and sales, I mean you still need to have your own sales-company or hired sales employees to keep your place in the store shelves. So you still have to pay for the sales work. In that way it becomes very two-faced." (the potato chips factory).

Interviewee from the ice-cream factory do also mention how central agreements plays a central role for optimal collaboration

"it should be possible to make the collaboration work by removing the possibility for food retail do make a difference of different products and exposure of them in store. And it should not be a problem for stores to buy products from producers who do not have a central agreement. Today, you know like almost everyone is negative to take in our products only because we do not have our products at the retails central warehouse. Or I mean, everyone except those stores who lies geographically close to us. There we have a completely different collaboration." (the ice-cream factory).

Both the interviewee from the potato chips factory and from the farm do mention old attempts of developing the collaboration with smaller producers and food retail and how those have differed in outcome.

"they do try to some extent… for example local suppliers… but I don't know how that have worked out. Probably not perfect since I have not heard more about it" (the potato chips factory).

"I mean there are examples to mention that has been successful, isn't it Stora Coop in Visby who decided to only sell Swedish meat, right? Or was it only gotlandic meat? I don't remember, but they did something like that in 2018 when we had this difficult draught. I guess they had to fight on a national level within their organization to do so. I am guessing this has been done in other areas as well. What I am meaning is that this is events where you have seen a common value, and therefore kept it that way. This is what we need to download to this giant bulk and transfer to society in general" (the farm).

The role of politics and legislation in this is discussed by interviewee from the farm, who mentions that if it becomes a political question it might be easier to solve.

"if it is only food retail and the producers who are going to solve this… while market forces continue to prevail. It is really complicated. Or else it would have happened (…). It depends on if food retail feels a responsibility over their impact on society in general. I really don't know if they do so. It has started to be talking about Swedens self-sufficiency of food and that the food inventory needs to be developed so that the cities have food in case of crisis. So I mean somewhere the question has been raised politically. (…) I don't know if these questions are related, sometimes I think so. (…) And I think politics needs to involve themselves in order for the collaboration to occur on the right presumptions. I don't think we will reach a change on a large scale otherwise" (the farm).

The interviewee from the dairy farm do also mention politics when discussing what factors are important in developing the collaboration.

"I think regulations needs to be made for private label products, regulations that… yeah I mean if private label products have to be a part of food retails assortment, then there need to be regulations that makes it possible for these products to exist in store without pressuring down the price. I cannot see any positive outcomes in the long run if the price to us farmers is continually pressured down only by the existence of private label brands. This must be important for the society as a whole, but also for the politics that runs this country, that it is not possible" (the dairy farm).

Regulations that make private label products not able to affect the price paid to the milk farmers from the dairy's is what the interviewee from the dairy farm mentions as the most important factor. This is discussed further with the politics will to have a strong and solid Swedish food production.

"It should be of an absolute interest for politics to have a strong and solid food production in Sweden. I cannot understand if this should not be of high importance for them to create regulations about. At the same time, I have some questioning thoughts about why this has not happened yet – how can we be in a situation where the price paid to Swedish farms is pressured down by the price pressure from Swedish food retails private label products? I

mean this is a discussion about the pure survival of farms. But I am not sure if anyone outside our shoes do understand the serious situation" (the dairy farm).

The interviewee from the dairy farm means that new regulations is necessary and of importance to secure the survival of Swedish food production. It is also questioned if there is general knowledge of this by people outside agricultural sector. When asking which factors that are extra important for this change to be possible interviewee from the potato chips factory mentions cost-effectiveness, interviewee from the farm mentions communication and long-term, interviewee from the dairy farm mentions regulations and the interviewee from the ice-cream factory mentions the will to collaborate and equality.

5.3 Summary

The answers presented in chapter 5.1 and 5.2 are summarized below in Table 6 for each case company.

Table 6. Summarized answers with each case company sorted by theme

Theme	The potato chips factory	The Farm	The ice-cream factory	The dairy farm
Business strategy	*Changed strategy due to experienced lowered margin in value chain*	*Increased lentil cultivation after changed demand*	*Not satisfied with product exposure in general and food retail in particular, will withdraw its products from food retail starting autumn 2023*	*Changed from having meat production to dairy production. Choice made out of personal preferences*
Power and dependency	*Perceives being dependent on food retail for continuing business as usual* *Less dependent than producers having central agreements*	*Perceives being dependent on food retail for continuing business as usual* *Feels dependent on food retail due to how they are their intermediary's largest customer*	*Perceives being dependent on food retail for continuing business as usual* *Explains that food retail has all power in product exposure, largely affecting producer's sales*	*Perceives being dependent on food retail for continuing business as usual* *Dependency lies in how food retail is the only place where consumers can buy their products*
Relationship	*Relationship feels distant. Think it is because they do not have central agreements, which is something food retail do not like*	*Relationship with food retail is far away, long time ago since meeting representatives from food retail. Wants to develop this.*	*Perceives food retail to be disqualified in the area*	*Means that the relationship only lies in how they are dependent on food retail. Do not perceive any other relationship.*

Private label	*Says private label products can be both positive and negative – depends on if the production and the raw materials is from Sweden*	*Mention how private label products can be both positive and negative – depends on if they are outsourced abroad or not*	*Do not appreciate private label products*	*Perceives that private label products existence in the shelves do only pressure down the price with negative long-term effects on farmers and Swedish production as a whole.*
Trade-offs	*Relates trade-offs made to sustainability approach of their products*	*Not satisfied with how their added value products are not marketed in store. Has to sell their KRAV certified products as conventional products due to food retail arguing they cannot withdraw the added value in store.*	*Wishes that their products added value would be of interest for food retail*	*Thinks their products has an added value that is positive for society as a whole*
Shared value	*Thinks that their product is appreciated by food retail since it widens the category*	*Does not perceive food retail to deliver the same value as their KRAV certified products do*	*Describes how their product is a good certified complement in a segment that has many conventional products*	*Questioning how shared value can be created when food retail competes with producer owned brands and pressure their prices*
Partnership	*Most cost-effective to develop how central agreements* *Use what has been learnt from old attempts to develop new ways of working*	*Consensus that leads to co-operation* *Increase the understanding for each-other's difficulties* *Involve politics*	*Decrease food retail power for product exposure and make it possible for food retail to buy from producers without agreements*	*Develop regulations for private label products* *Involve politics*

The answers presented in Table 6 gives a brief overview of the interviewee's perceptions. The overview is sorted by the themes used for the interview guide, previously presented in Table 2.

6 Analysis

In this chapter the empirical results are explained through the perspectives of the theories and the thematic framework, both presented in chapter 3. The structure of the analysis chapter is created out of the structure of the thematic framework. The Ladder of Partnership Activity is used as a general frame of presenting the producer perspective of which factors can contribute to new ways of collaboration between food retail and small food producers.

6.1 Power and dependence

The potato chips factory, the farm, the dairy farm and the ice-cream factory do all have in common how power is one of the most mentioned words in terms of the relationship to food retail. As illustrated in Figure 1 (*see chapter 3.1.1*) Casciaro and Piskorski (2005) describes that the power an organization perceive having over another organization is equal to the dependence the organizations perceive the other way around. For the case companies this is illustrated in how all case companies do all mention being dependent on food retail too, but, in which situations and to which extent this is power and dependence is perceived for each company do differ. None of the representatives from the case companies mentions to believe that food retail is dependent on them as a producer in some sort of way. Porter (1980) means that buyers and suppliers always depend on each other to be able to continue business as usual. This contradiction can possibly be explained with how barriers for competitions are slowly removed when market becomes global (Porter, 1996), meaning that the new world market lowers the food retails dependency of one supplier since there is always another one to exchange them for. This is partly mentioned by interviewee from the farm in how their dependency lies in not having other buyers.

6.1.1 Changing business strategy

All case companies do mention to have made changes in their business strategy during the last year. What is similar for the farm, the potato chips factory and the ice-cream factory is how the changes are due to circumstances occurring outside their company. Porter (1996) means that businesses that are being forced to change strategy are the same businesses that experience major structural changes in the whole industry. For instance, the strategy for the potato chips factory has changed regarding its sales to go from only selling through wholesalers to selling both through wholesalers and doing own sales as-well. The change is made after experiencing the product margin being too low for the potato chips factory, while also having a wholesaler who needed a margin that caused the product to be too expensive in store for its customers. Porter (1996) means that to outperform competition one must establish a difference that is preservable. It is not clear if this change has made the potato chips factory outperform competition. What is noted is that this change in strategy managed to change their product price in store, giving them a higher margin and also their customer in food retail the possibility to lower the price for consumers. This can be seen as a preservable change for them and the other actors within the chain. The interviewee from the farm mentions having changed their strategy due to a change in demand from its customers in food retail, and the interviewee from the ice-cream factory mentions having changed their strategy by starting to remove their products from food retail. This is for the ice-cream factory due to how the company has limited resources for sales work together with the representatives of the ice-cream factory experiencing bad product exposure and price pressure in store by food retail. Instead the ice-cream factory will increase their own sales even more, which is mentioned by the interviewee from the ice-cream factory to suite their specific customer groups better either way. This action made by the ice-cream factory is similar to how Porter (1996) talks about trade-offs arising from activities themselves; meaning that different positions require different skills and management systems. The ice-cream factory is mentioned by the interviewee to not have the resources to do the sales work necessary to be competitive its food retail customers, has changed to working with skills and systems that they already have and also that their customers are more familiar with.

6.1.2 Rivalry about shelves space

While the interviewee from the farm mentions that the power of food retail lies mainly in how they determine the price of the products, the interviewee from the potato chips factory mentions that the only thing they can control is what price they can sell their products for and how much they can deliver – and the rest is up to food retail. The interviewee from the potato chips factory do also describe that if they say a price that is too high for food-retail, they do not get to sell their products to them until it is a price that both parties agree of. Both interviewees from the potato chips factory and the farm do in other words mention the same thing but from different perspectives, the interviewee from the potato chips factory describe it as what Casciaro and Piskorski (2009) explain as mutual dependency regarding pricing and the interviewee from the farm describes it as a power imbalance with food retail regarding pricing. The difference of these ways of description is explained by Casciaro and Piskorski (2009) who suggest that power imbalance and mutual dependence should be held apart due to how they affect organizational ability to reduce dependencies in opposite ways.

The respective products from all case companies reaches their end-consumer through food retail. According to Porter (1980), price sensitivity from a consumer perspective is mentioned to be rising if the product is expensive related to consumer income (Porter, 1980). Porter (1980) continues the reasoning with how this is equal to the power of wholesalers and retailers, where retailers can gain significant power over manufacturers if they can influence the buying decision of consumers. This is visualized in description by the interviewee from the ice-cream factory's of how food retails product exposure in store affects their sales largely in a negative way. The same interviewee also mentions how the price pressure in food retail is what they want to get away from by starting to sell their products themselves directly to the end-consumer. Price pressure from food retail has according to interviewee from the farm been a growing problem since the number of private label products has increased over the last years, while an experienced increased power of food retail has been perceived as-well. The interviewee from the dairy farm ´mention the same cause to the price pressure they perceive, and that the only relationship they have with food retail is how they are dependent on and affected by what is happening there. Drees (2010) means that companies that experience losing its autonomy having a buyer and supplier relationship should develop its interorganizational relations in order to get back to being in command.

All four case companies have presented their value offer, and similar for all of them is how the value offer is strongly related to sustainability. The products made by potato chips factory is produced with local raw material and in a 100% fossil-free production site, while products made by the farm and the dairy farm is mentioned by their interviewees to contribute to biological diversity and a vibrant countryside, and the products made by the ice-cream factory is 100% ecological products, and also marketed with its locally production. This is related to a trade-off made by each company, saying that they do not make products that are unsustainably produced. Porter (1980) means that it is necessary for companies to not try to deliver other values than what your customers are used to, since this risks to confuse both customers and employees. This choice of positioning is also related to how Porter and Kramer (2006) argue for how choices made within a business should benefit the society too, and if not – the temporary gain of one of them will undermine the long-term success for both of them. Choosing a value offer that benefit social aspects are an important task in order to reach a sustainable strategic position (Glasbergen, 2011, 1).

6.2 Developing new ways of collaborating

The case companies have during the interviews presented different aspects of the on-going collaboration with food retail that is not working for them in the long-term. The interviewees from the potato chips factory and the farm mentions how there is a need for inventing new ways of working with food retail without interrupting the on-going market forces. This is a good starting point for Glasbergen (2011) model The Ladder of Partnership Activity which idea is to address how to use market mechanisms to create sustainable partnerships.

6.2.1 How to build trust

The interviewee from the farm describes a wish of deepening the collaboration with food retail and develop the relationship. This is related to how Glasbergen (2011) mentions that internal trust is built on believing that the partner has positive intentions and that their competence is valuable for a partnership. The factors mentioned by the interviewee from the farm to be experienced as trust-building from a producer perspective with food retail is communication and a having long-term view. Open communication is something Glasbergen (2011) describes as being necessary to gain external trust from relevant external parties for both parties. The interviewee from the ice-cream factory mention that removing the power from food retail to affect the price and product exposure in store is something that would make them have a better attitude and positive experience of food retail. The interviewee from the dairy farm is on to similar reasoning when mentioning that regulations, which makes it impossible for private label products to affect the price paid to them by the dairy, is necessary for them to consider having a positive relationship with food retail. To have a good attitude towards the partner is something Glasbergen (2011) also mean is essential for gaining trust in this first exploratory phase of partnership.

6.2.2 How to create collaborative advantage

The interviewee from the farm describes that there is a constate debate about who's responsibility it is to market the added value KRAV certified products offer. It does often conclude in a presumption that this is something that food retail should be doing, since they are the ones selling the product. According to the same interviewee this is not happening, which further makes the products with added value being sold in food retail without its certification mark and to a price that does not cover the real costs of the product. The interviewee from the farm mentions that KRAV as an organization is working hard for the added value to be visible for the consumer in store, saying that this could benefit the food retail as well. Glasbergen (2011) means that in this part of a formation process it is important that the achievements made for the parties together is something that the other one could not achieve alone. The interviewee from the dairy farm do also bring up the topic of how they do not receive a payment for their products that covers the real cost of the production. The same interviewee also mentions that there is not possible to extract a shared value from food retail when food retail competes with producers' products, and that this is what needs to change in order to get to the point of creating collaborative values and advantages.

The interviewee from the ice-cream factory, on the other hand, discuss how it is important for them to not be negatively affected by food retail's behavior outside what they can control which is also what the interviewee from the dairy farm mentions should be regulated by laws in some way. This is an important aspect to take into account during a formation process since Glasbergen (2011) argue that if one of the partners finds the other one to receive greater benefits to a lower risk, a sense of unfairness will damage the trust.

6.2.3 How to constitute a rule system

At this level of the ladder the parties are aimed to form and agree upon collaborative outputs. This is also the point where some sort of contract is made between the actors (Glasbergen, 2011). The interviewee from both the potato chips factory and the farm mentions different lessons learned from old attempts of developing collaboration between food retail and small food producers. The interviewee from the potato chips factory mentions a project called "local suppliers" that was not a successful one from their point of view due to how the platform were difficult to use. The interviewee from the farm describes how a specific food retail store has chosen to only sell locally produced meat as a helping action during the drought in 2018. The same interviewee describes that this was a successful project due to how both the food retail store and the producers saw a common value, and therefore kept working after these rules even after the drought was over. This is one example of a collaborative output that is decided during this stage of a formation process. Glasbergen (2011) means that this is a part of the process that changes the partnership fundamentally due to a formal commitment, and that it is therefore especially important to address how the partnership deals with decision-making during the future collaboration.

6.2.4 How to change the market

Glasbergen (2011) argues that markets can be changed if the implementation of a rule system takes place in the whole chain, making this level an important step towards to gain legitimacy from other actors within the specific chain. The interviewee from the ice-cream factory describes how the food retail stores that is geographically close is much easier to cooperate with and mentions an idea that this is since their product is marketed by its sustainability values and being locally produced. This is a relevant aspect in the process according to Glasbergen's (2011) description of how a new partnership has the incentives to transform a conventional chain to a sustainable chain, and that the created value changes the nature of the chain where a sustainable chain focus on both economic profitability as well as to expand the concept of value of ecological and social issues. Glasbergen (2011) do mention that this new practice within the chain, where a market is in change, are a part of the economic struggle for market power due to how they shut out some sustainable aspects while serving others.

6.2.5 How to change the political order

The interviewees who mention involving politics while developing new ways of working for food retail and small producers is the interviewee from the farm and the dairy farm. Using political action is one of five ways that Pfeffer and Slanacik (1978) argue is useful when wanting to minimize external dependencies in relationships characterized with power imbalance. Glasbergen (2011) means that at this last part of the ladder important questions to ask is if and how partnerships influence governance in the society, and if this new way of partnership has the ability to institutionalize a new way of collective accountability for sustainability issues as-well. This is similar to how the interviewee from the farm discuss that if there is no political involvement in this transformation, then it will be hard to develop change at a large scale. The interviewee from the dairy farm also puts a lot of weight on the necessity of regulations from the politics in order for the long-term survival of farmers.

7 Discussion

In this chapter the research question presented in chapter 1.4 are discussed by using the empirical results in chapter 5, the problem background and problem discussion in chapter 1.1-1.3. The discussion chapter has the aim to discuss the research question through a contemporary perspective and give light to different perspectives of the empirical results.

7.1 Business development of small food producers

The first research question to discuss is *How do Swedish food retail and their private label products affect the business development of small food producers?* What is notable on a general level is how the representatives from three of the case companies describes a change in their business strategy due to external changes, and how the start of the process of change has begun during the last year. According to Arvidsson (2023) the world market has during the early 2020s been deeply affected by the effects of the Covid-19 pandemic followed by the still on-going war in Ukraine. These changes in the external environment are mentioned by Swedish Food Retail (2023) and Crofts (2023) to have resulted in a changed buying behavior amongst end consumers as-well. This causation is noted by the ice-cream factory, which representative mentions the change of buying behavior amongst their consumers to play an important role behind their decisions of changing business strategy. The farm instead mentions changed demand to be the reason behind their changed strategy, but by extension, the change in demand is a result of a changing buying behavior. On one hand, these change in business strategy can solely come from the changes in external environment, but on the other hand - the characteristics of food retail in Sweden is heavily important to involve in this discussion due to its specific features. Swedish food retail, where all the case companies operate, has a very high market concentration which is characteristics that according to Bern *et al.,* (2018) also increases the market power of the actors within the market. Adding that Casciaro and Piskorski (2005) means that the opposite of power within a business relationship is dependency, the case companies has been asked about both their perception of food retails power and food producer dependency and vice versa. The interviewees of all four case companies mentions being dependent on food retail for continuing business as usual, but the described reason for this dependency seems to differ. The interviewee from the potato chips factory describes what according to Casciaro and Piskorski (2005) can be seen as a mutual dependency - where they have the power of deciding the price but it is up to food retail to decide if the price is worthy enough for the product to end up on the shelves. The same interviewee also describes how food retail is the only one who decides if they should buy their products or not. This can be related to results of a high market concentration, which according to both Borgström and Josefsson (2015) and Lundin (2011) creates pre-conditions that are favorable for food retail, since it creates opportunities for them to a larger extent make their own decisions regarding price and assortment. The interviewee from the farm, on the other hand, mentions their dependency to lie in how they do not have any other buyers, since food retail in general is the only one who sells food in stores to consumers today. This can be an implication of what Daunfeldt *et al.,* (2017) means when explaining how markets with high market concentration is a result of a less well-functioning competition.

The interviewees from the potato chips factory, the farm, the dairy farm and the ice-cream factory mention the most sensitive part of the dependency to lie in how it is food retail who decides the price. The interviewee from the ice-cream factory is extra clear when connecting the pricing sensitivity to how the products are exposed in each food retail store. The same interviewee also mentions the product exposure in food retail to not work sufficiently, and that this is one of the main causes behind their lack of sale. According to both Moström (2022) and Röös *et al.,* (2020) the store exposure and assortment changes is essential when influencing customer choices for buying decisions. If adding the aspect of the external changes that has led to an on-going inflation, the exposure of product becomes an even more sensitive process for both the producer and food retail, but also for the consumer who according to Swedish Food Federation (2023) during this time has increased their hunt for low prices during this, which is directly related to the increase of private label products since they often have a price that is lower than similar products (ibid). It is also mentioned that 90 percent of their member companies experience a tougher competition from private label products in the store shelves in 2022 than earlier (ibid). On the other hand, it is important to remember that Swedish Food Federation is an organization that represent food producers in Sweden, being these member companies "largest voice" of food producers towards politics and in media. There is no implication of them having made-up claims, moreover it is important to remember their organizational aim and role in this discussion.

In comparison to Swedish Food Federation (2023) reasoning above, the interviewee from the ice-cream factory who in particular discussed the lack of product exposure, has not mentioned private label products to be the main reason behind it. The increase of private label products in store is mentioned to be disturbing to them as a producer though, but they do not think that private label products are the main cause of the difficulties with product exposure and decreased sales in food retail. The interviewee from the dairy farm, on the other hand, do argue for the effects of increasing private label products in store to be devastating for them as producers and also for the long-term food production in Sweden. The interviewee from the dairy farm means that the price pressure food retail has on producers of their private label products is the reason behind why the same producer, their intermediary, cannot pay the dairy farm the real cost of the product. Gielens *et al.,* (2021) mentions how the scale of economy by producing private label products may lead to increased sales, but that it does not always lead to increased margins. In other words, it is possible that this is what the intermediary to the dairy farm experiences. Due to the reasoning earlier by Swedish Food Federation (2023) of how consumers have increased their hunt for low prices, this raises a big concern regarding what long-term effects this has on Swedish food production as a whole by the interviewee from the dairy farm. The long-term effects on Swedish food production are also mentioned by the interviewee from the farm, but in terms of how private label is thought of dependent on if the raw material is Swedish or not. If it is, then the effect is not perceived to be negatively at al by the interviewee from the farm. This perception is similar to what is mention by the interviewee from the potato chips factory, who thinks that it can be positive for producers that gets the possibility to increase production quantity with followed increased sales due to private label contracts - if the production stays in Sweden. On the other hand, the interviewee from the farm raises a big threat if the production is not kept in Sweden due to how the rules and regulations of food production differs a lot between countries, opening up to an even higher price pressure from products produced cheaper abroad. This aspect is taken up at a governmental level in the strategic goals "The Government's Food Targets for 2030", which involves a paragraph about how consumers should be able to buy locally produced and ecological food, and that the rules and guidelines shall support competitive and sustainable food chains where Swedish production increases.

It is notable how it is the primary producers who place the greatest importance on the risk of private label products, and how the interviewees from these companies are the ones mentioning experiencing negative effects due to how there are no regulations regarding private label brands operation. The interviewee from the dairy farm mentions during the interview that they are the ones who "shout the loudest" in media right now simply because they are the one first to notice the negative effects, and that those who are later in the food chain has not noticed it as clearly yet. This point of view can partly be explained by SCB (2021) presentation of how the product group where the share of private label products has grown the most since 2004 is the product group milk, cheese and eggs – in other words where the interviewee from the dairy farm's product is involved. The increase converted into percentage change shows a growth by 1383 percent (SCB, 2021).

One aspect that was briefed in the discussion of private label products by interviewee from both the farm and the ice-cream factory is the added value of products. The interviewee from the farm describes how they have been informed by food retail claiming it is no longer possible to extract the added value in store that their KRAV certified products have. This results in that their meat products that are produced where the entire chain is KRAV certified, is sold in store as conventional products and to the same price as conventional products. The same interviewees perception is that this is a discussion solely about product volume and time management for product differentiation by food retail, not a lack of possibility for consumers to involve the value offer in their buying decision. The interviewee from the farm continues with asking if it is really the consumer that do not manage to understand the added value or if it is food retail who thinks it is just easier to sell fewer product categories. To head back to the not so well-functioning market competition explained by Daunfeldt *et al.,* (2017), Lundin *et al.,* (2018) adds that a not well-functioning market competition shapes defensive attitudes between actors. The effect of this is according to Lundin *et al.,* (2018) inhibited actions for innovation which gives negative effects to the whole chain. KRAV certified products are the most sustainable produced products (KRAV, 2023), which can be seen to have innovative characteristics when involved in the over-all discussion of how food production and consumption world-wide needs to be more sustainable.

The products made by the ice-cream factory do also contain added value through its 100% ecological raw material, but the representative of the company mentions that this is not something food retail highlights in store. The representative of the ice-cream factory describes how the lack of interest from food retail in the added value creates a price competition from products that do not have the same sustainability profile. Organic products are just as KRAV a sustainability mark that promise that no pesticides have been used during production (Agricultural Agency, 2023). KRAV is always organic, but organic products are not always KRAV. KRAV does in other words have a bit higher standard than organic products – but both of them are labels securing sustainable production (KRAV, 2023). The interviewee from the farm explains that there is a "never ending discussion" about who in the chain are responsible for marketing the added value of KRAV products, and that it often ends up in that it is food retails responsibility. When heading back to the claiming by food retail that it is no longer possible to sell the products with added value to a price involving this value, it becomes interesting in involving food retails point of view. Two of the five most important areas presented by Axfood (2023a) in their sustainability report for 2030 is *sustainable consumption* and *strengthened added values for Swedish food*. In the sustainability documents from Axfood it is described that there is a problem regarding added value products, both from a producer perspective and a consumer perspective. It is written that producers do have a problem with converting product added values to real competitive advantages and that there is of high importance to increase the consumers understandings of the added values in order to increase the Swedish food productions competitiveness (Axfood, 2023a). On Coop's website (Coop, 2023d), it is described how the company have changed their meat assortment towards having 87% of the meat coming from Swedish farmers. This choice is explained with how Swedish meat has lower emissions and lower antibiotics usage (Coop, 2023d). In ICA's sustainability document there is no description of any problem-solving activities for added value products. The activities made by ICAs stores for locally produced food has been initiatives made by the owners of single stores, not by ICA Group AB as a food retail owner. This differs from Axfood and Coop, where initiatives has come from the owner group. This can be explained by the difference in ownership structure, where every ICA store is owned by one company each – which is not the case for Axfood and Coop stores that are owned by either the business group or by its members (ICA, 2023b; Axfood 2023b, Coop 2023c). Despite these differences of ownership structure, it is notable how the different food retail stores are involved and present this problem of sustainable products and Swedish production to different extents.

For the interviewed representatives of the four case companies there is a concordant of how food retail market power and the price pressure that comes along with it is affecting their businesses. How private label products in particular affect the business development differ between the interviewees. Private label products are mentioned to be a bothering part which without regulations might have devastating long-term effects on Swedish food production and Swedish farmers. But private label products are not mentioned to be the main cause behind the price pressure in food retail by all case companies. The primary producers mention the price pressure to come from how private label products increases, while the manufacturers have other explanatory models to why they experience price pressure from food retail. Private label products are not the primary reason mentioned behind what has made the representatives of the case companies take initiatives towards changing their business strategy the last years. The reason behind the changes in business strategy lies for the interviewee from potato chips factory in experiencing a lost margin from wholesalers, for the interviewee from the farm and the ice-cream factory to lie in a changed demand from consumers. The lowered margin is what Gielens *et al.,* (2021) mentions as an effect on increased private label sales in food retail, while a change in consumer behavior is noted as an effect of the external events as pandemic and war in Europe during the early 2020s (Swedish Food Retail 2023; Crofts 2023). There is a possibility that the changes experienced by the manufacturing food producers are an effect of the increase of private label products and the market power from food retail, but on the other hand it is also possible that there is no causal relationship between the events.

For the potato chips company, the interviewee mentions how price pressure is perceived to be at different levels due to different sort of agreements with food retail, while interviewee from the farm perceives the price pressure to revolve around the difficulties for food retail to market the added value of their products – which partly is due to them having their own private label products that can be sold to a lower price. The interviewee from the dairy farm do mention the price pressure to be solely due to food retails increase of private label products. The interviewee from the ice-cream factory do connect the price pressure of their products to food retails market power and also to consumer power and is disturbed by private label products exposure in the shelves but do not think they are the main cause behind the lack of exposure for their own products.

7.2 New ways of collaborating

The second and third research question for this project is *How do small producers want to collaborate with food retail*? and *Which factors are contributing to new ways of collaboration?* As presented in chapter 6.2, Glasbergen's (2011) model The Ladder of Partnership Activity idea is to address how to use market mechanisms to create sustainable partnerships. The key concept presented by the interviewees from each case company is presented in Figure 10 below.

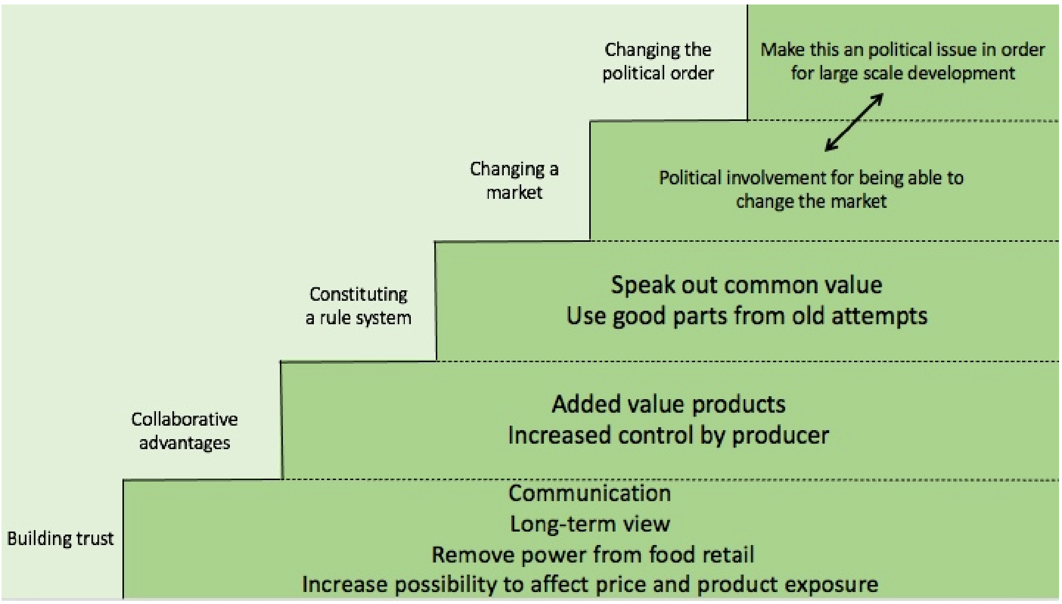

Figure 10. Illustration of factors contributing to new ways of collaborating from food producer perspective.

Figure 10 illustrate the factors mentioned by the representatives from each case companies to be important in order to create new ways of collaboration. The first step, building trust, is also the step with most factors important to involve.

7.2.1 Building trust

The interviewee from the farm mentioned communication to be one of the factors important to take into consideration. The same interviewee mentions the relationship with food retail to be far away, and that there is really no direct contact with food retail due to the food chains characteristics today. To increase the communication with food retail in general can therefore be difficult as it is today. But, the three largest food retails do, on the other hand, contain different characteristics which to different extents can ease the development of communication. For instance, on Coop website you can read how the aim to be an active part where food, sustainability and health collaborate (Coop, 2023c). At the same time, representatives at Coop has determined the chain to actively support long-term secure of Swedish production by having a relatively large quantity (87%) of meat from Swedish producers in their assortment. This decision regarding implementing an assortment at all the food retail stores can be compared to how ICA's similar initiatives comes from one retail store owner at time. On one hand the difference in to which extent sustainability initiatives are taken is understandable due to the de-centralized ownership structure of ICA (ICA, 2023a) compared to Coops cooperative ownership (Coop, 2023c). On the other hand, ICA Group AB being the largest actor in Nordic food retail market has the market shares of making an even larger impact and difference for Swedish producers if a similar decision regarding assortment would be made in ICA's retail stores that has been made in Coop's retail stores.

The interviewee from the ice-cream factory do imply that one important factor to involve in this development is to remove the power from food retail. The interviewee from the dairy farm is on the same page and believes that this should be done through regulations of private label products. To remove the power completely in a market of oligopoly characteristics (Food in focus, 2023) could be difficult, on the other hand, this could instead be thought of in terms of how to constitute a rule system (step three in the ladder) that determines how the power should be used in order for each partner to gain the same advantages of the partnership, which Glasbergen (2011) means is one important aspect at this stage. An example of how the market power is used to benefit the producer is the earlier mentioned decision by representatives of Coop (2023c) during the devastating drought in 2018, where representatives from Coop helped farmers by increasing their share of Swedish produced meat in the whole food retail chains assortment. Initiatives from food retail where the power usage benefits the producer could in other words be great examples of how to build trust between producers and food retail from a small producer perspective.

7.2.2 Collaborative advantages

According to Glasbergen (2011) it is important to make sure that both partners do receive the same number of benefits when discovering collaborative advantages created by starting a partnership. What is necessary to take into consideration is how this is transferable to a co-operation that has the characteristics of Swedish food retail with its high market concentration and followed market power. Lundin *et al.,* (2018) means that food retail already today is argued to favor on food producer's business idea and development which in the long run reduce pace of innovation and development in the food chain as a whole (Bern *et al.,* 2018). To re-write this to a partnership that gives both producers and food retail the same number of benefits can therefore be difficult. The interviewee from the farm mentions that how food retail deals with added value products is one of the most important factors for them in order to be able to create collaborative advantages. In Axfood's sustainability report added value products is mentioned to be an issue for producers due to their difficulties in converting the added value to real competitive advantages (Axfood, 2023a). In this report it is also described how consumers understanding of the added value is crucial necessary to increase. The interviewee from the farm, on the other hand, mentions have been informed by food retail representatives claiming that it is not possible to extract the added value in store from their KRAV certified products. Adding how the interviewee from the farm describes how there has been an on-going discussion for years about who's responsibility it is to market the added values of KRAV products in food retail. The same interviewee mentions that their perception is that the discussion often ends up in it being food retails responsibility – but *"food retail does not work with that at all. That is my opinion at least"*. The interviewee from the ice-cream factory do also describe how they have not seen food retail make any difference for their products that has added value to other products, and that this creates an unworthy price competition.

There is an interesting aspect in how both interviewee from the farm and the ice-cream factory describes having been told by food retail that added value products cannot obtain their added value monetarily, while, for example, Coop (2023f) argues that with their private label products under the label *Änglamark* they can choose sustainability labelled producers and through that increase their share of organic and KRAV products in their assortment. There is a contradiction in this discussion that could be important to address even further while developing new ways of collaboration between food retail and Swedish food producers with added value products. None of the other food retail chains address the issue of added value products on their website. On one side, how this is presented in Axfood sustainability report can indicate on a will to develop this to a collaborative advantage. But on the other side, the farms perception of the long-term reluctance from food retail to differentiate added value products from others and learn consumers about the meaning of the certification KRAV is noticed. This aspect of how to create collaborative advantages is important to involve, both for the food retails chains who already has pinpointed this issue – but also for the others since they have a huge opportunity in developing its sustainability profile. Another input regarding possibility for collaborative advantages is from the interviewee from the dairy farm who describe that there is not possible to collaborate with food retail if they actively compete with producer owned products. It is mentioned by the same interviewee that as long as food producer can make decisions that negatively affect the price of producer owned products it is not possible to collaborate. According to Glasbergen (2011) the next step of the ladder's most crucial part is to address how the partnership deals with decision-making during the future collaboration. There are no suggestions from neither of the three largest food retail's websites regarding how their private label products interfere the collaborative relationship with small food producers by the competition with producer owned brands. Due to the strong standpoint in the subject for the interviewee from the dairy farm, this could preferably also be considered in the discussion of creating collaborative advantages to not risk that one partner gets more advantages of the collaboration than the other.

7.2.3 Constituting a rule system

This decision-making part of the ladder could be fundamental for the on-going collaboration between producers and food-retail due to how the interviewees from all case companies mentions an experienced one-sided decision-making role in food retail. This relates to the later part of the discussion in the first step of the ladder, *building trust*, where the power of food retail was brought up in terms of positive and negative power usage. An example of positive usage of food retail market power is how one food retail chain changed their assortment of meat to 87 percent Swedish produced meat to help farmers during the drought in 2018 (Coop, 2023c). This is an example of what the interviewees from the potato chips factory and the farm describe as good examples to use lessons learned from while develop new ways of working. The interviewee from the farm mentions the initiative by representatives from Coop during the drought as, from their point of view, a successful project due to how both parties saw a common value in the initiative – and that this common value is what made the initiative become a new way of working instead of only being a short project with an ending. The interviewee from the farm and the interviewee from the dairy farm both argues that Swedens degree of self-sufficiency is necessary to involve in a creation of the future collaboration system with food retail. Light was shed on how resilient the Swedish food production is towards external crises during the drought in 2018. According to Högberg *et al.,* (2018) Swedish food production need to be more resilient but describe that due to how food production industry is being dependent on other actors and resources, it is very difficult to achieve. The other actors and resources outside food production industry that Högberg *et al*., (2018) refers to are, amongst others, climate changes in the physical environment. Primary production is on one hand extremely dependent on the natural resources in sun, rain and wind, which are factors that cannot be controlled by anyone. On the other hand, there are competition from foreign productions that can act on completely different terms, as described by interviewee from the farm saying *"…it is hard to produce* *agricultural products at the same terms as in Brazil or the Netherlands for example".* In comparison to weather and good cultivation conditions, external competition is something that can be controlled. In order for Swedish food production resilience to increase, this is something that could be taken into consideration when *constituting a rule system*.

7.2.4 Changing a market

The two finalizing steps of The Ladder of Partnership Activity are according to Glasbergen (2011) steps that involve external interactions. These two steps are to a larger extent dependent on external organizations, regulations and orders than the three previous steps. The interviewees from the farm and the dairy farm are the only ones who involves external organizations which are not food retail and food producers as solutions for developing new ways of collaboration. The interviewees do discuss regulations from the political point of view, so the answers for this step of the ladder and the last following step are in most ways interrelated due to how changing a market demands politics involvement. One example of an external action towards changing the market is presented by Domeij (2023), who argues that there should not only be the sustainability aware and engaged consumers that drive the entire change of the food system. The argument is that how food labeled with sustainability certifications should have a reduced VAT rate and that this should fasten the pace of turning the food system more sustainable. To change the VAT rate on certain food have a decision-making process that starts in the politics.

7.2.5 Changing the political order

The interviewee representing the farm believes that if it was possible for food producers and food retail to solve the issues perceived by food producers, it would already have happened. The same interviewee also raises question of how the possibility for change to occur depends on how much responsibility the representatives for food retail feels over their impact on society in general. To ask if and how the new ways of collaboration through partnership influence governance in society is what Glasbergen (2011) means is essential for this last part of the ladder. What interviewee from the farm raises as the big issue if no political involvement occur is that *"if the politicians do not actively join this problem with the aim to keep Swedish agriculture and food producers with some sort of regional politics, then all agricultural companies will be reduced and the number of animals as-well",* which gives the presumption that effects on the whole food system will be of large scale. The interviewee from the dairy farm raises the same question and mentions a perception of how this issue cannot be solved without political involvement and regulations for food retail and its private label products. In the sustainability report produced by representatives from Axfood, it is mentioned that the Swedish climate politics is weak, and that the engagement for adjustment towards sustainability is larger amongst food businesses than in the politics. What is also written is that even though food businesses have the possibility to do a lot of things, the politics is necessary in order to drive the change forward (Axfood, 2023a). The strategic goals presented by the Swedish Government Office (2017, 1) in the report "The Government's Food Targets for 2030" do shed light on how consumers should be able to do conscious and sustainable choices in locally and ecologically produced food, and how governmental rules and guidelines shall support competitive and sustainable food chains where Swedish production increases. With a strategic goal plan created over six years ago by the Swedish Government Office (2017, 1) it is notable that the interviewees from all case companies still describe a dissatisfaction with the current state of the food system. On one hand, it can be questioned why there is no change noted by the producers after six years of strategic work from Swedish Government. On the other hand, the external circumstances experienced since early 2020s has not been forecasted. These external circumstances have not only affected the food producers by increased commodity prices and raised interest rates (Crofts, 2023), but also the whole industry. These external circumstances are by Swedish food retail (2023) argued to be the foundation of fundamental changes in consumer buying behavior and described by Swedish Food Federation (2023:1) as of one of the most extreme changes in Swedish food industry in modern times. Representatives from food retail argues that there needs to be political involvement for the change to move faster (Axfood, 2023a), while the interviewees from the farm says that *"... I think the politics needs to involve themselves in order for the collaboration to occur on the right presumptions"*. Due to the external happenings in the early 2020s, The Swedish Government Office (2023) has during the writing of this project started the work with updating the Swedish Food Strategy which aim is to contribute to increasing total food production, develop the promotion of Swedish-produced goods and also to reduce our vulnerability in the event of a possible crisis. As seen in Figure 10, the last step of the ladder from a producer perspective consist of making this a political issue in order to reach change in a large scale.

8 Conclusions

The last and final Chapter 8 do reconnect to the aim of this study and summarize the key findings and present the implications. The chapter finalize with a critical reflection of methodological choices together with suggestions for future research.

The aim of this study was to describe small food producer's perception of private label effects on their business development and to identify the optimal collaboration between food retail and small producers from a producer perspective. During this project the producer perspective of four small food producer has been presented.

8.1 Practical implications

Being a small food producer in today's competitive environment comes with many difficulties. On the other hand, its existence serves a key role in the everyday life for the common man – so the incentives for overcoming difficulties are of the larger variety. The representative from the farm quoted that in order to be able to develop the collaboration between small food producers and food retail it must exist a *"consensus that leads to co-operation"(interviewee from the farm).* Meaning that the highest implication for both partners is to have a coherent picture of the problem, only then a collaboration can be developed on good terms. This description of a need of a consensus between the partners is many times visualized in the food producer perception of the environment in the food chain today, to some further extent this is therefore momentous for this project.

Even though there is a consensus amongst the food producers of how there is difficulties in the food chain, each representative has their own explanation model to how these difficulties have arisen. What is notable is how it is the interviewees representing agricultural companies who are worried about the long-term effects on the business development of food production in Sweden to a greater extent than the interviewees operating as manufacturers. The interviewees from agricultural companies are also the ones who to a greater extent mentions the need for regulations from the political side regarding how private label products should be managed in the food chain. Without political involvement and new regulations, the perception of the two interviewees in agricultural sector is that the result will be devastating for the countryside with deteriorating biological diversity, fewer farms and animals that keep nature open, fewer sustainably labeled foods and a lowered degree of self-sufficiency of food for Sweden.

What were of largest surprise was the information from The Farm regarding how their KRAV certified products on food retail command are sold as conventional products. The monetary compensation for the added value of the product did not appear either. The motivation behind this action from food retail was that consumers did not want to pay for the added value, while the producer experienced an unwillingness from food retail to market the added value. Looking to the larger picture, this is alarming in three aspects: The lack of monetary compensation which in long-term is not feasible for survival of food producers. How these sustainability certified products cannot be found by customers who wants to buy them and pay the real price for them. And third, the attitude regarding KRAV products from food retail through the aspect of how big market power they have. No one can possibly have missed how we live above earth's resources, and the adjustment towards a sustainable food production is one important part to how we can lower our imprint. To do so sustainable food products needs to be facilitated in the food chain and food retail – not the other way around.

The implication of this project is partly a contribution to the ongoing debate that revolves around the Swedish food system as a whole from a producer perspective. The complexity of the food system and Swedish food retails power role has been mentioned several times during this project. The complexity of the food system partly comes with difficulties of delimit the discussion, since many aspects of the debate correlates in different ways. In order to illustrate which factors the small food producers perceive is most necessary to involve in the further development of the food chain, a mind map is shown below in Figure 11.

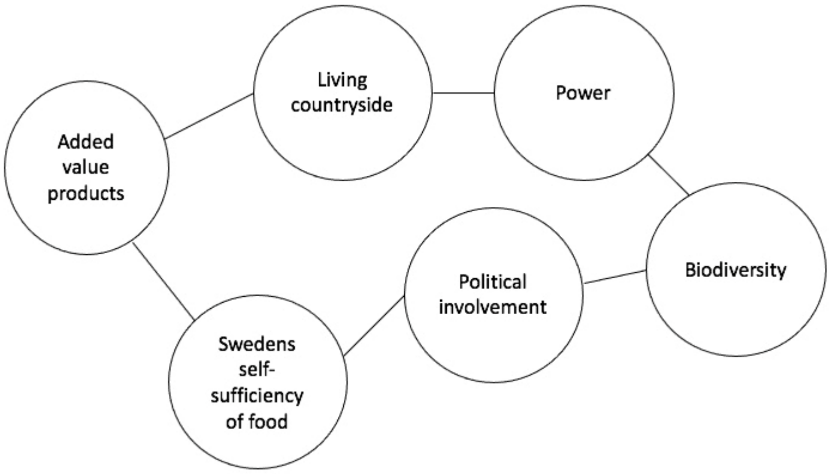

Figure 11. Mind map of the most important aspects necessary to involve in the further development of private label products and relationship with food retail from a food producer perspective.

The mind map is a merger of the aspects that were most frequently mentioned by the interviewees being important to involve in the development of the food chain from a producer perspective. There is a present will amongst the representatives from the food producer companies to solve the issues and develop the food chain further which should be a good point for starting.

8.2 Methodological reflection

During this process the case companies was chosen to be four. Although the purpose of the project was not to generalize the results, parts of the discussion and the conclusion chapter highlighted the difference and similarities in answers among primary producers and food producers. If a larger number of case companies would be included in this project, several more perceptions of the topics would be described. This, in turn, would affect the results in new directions and also add other dimensions to this. This is also the case if mixed methods would have been used, adding collecting information about the perception of small producers from a broad population through surveys, for example.

Another methodological reflection lies in how the interviews were conducted. The interviews were made over phone and e-mail, which has some delimitations regarding losing some of the personal connection during interviewing. This can result in less in-depth questions following up the answers to the general questions asked, which in turn can decrease the nuance to some of the answers made. It is also possible that the interviews conducted over e-mail would have had thicker descriptions if conducted in real life due to how conversations often are more fluent than written words. Also, one of the interviewees is co-owner of the same company as the author. Even though the author has been very careful with being objective during the whole process and not talked about this subject at all with the interviewee before the interview, it is possible that the answers and the analysis of that case's answers has been affected by this to some extent beyond the author's knowledge.

8.3 Future research

During the process of this project the discussion in media has been highly on-going regarding Swedish food retails market power, private label products and how this affect food producers. One important happening in the field is how The Governmental Office (2023) has started the work with updating the Swedish Food Strategy. The Swedish Food Strategy is mentioned in the majority of the articles and essays read during the literature review and can be assumed to be of great relevance in the field. Political involvement is also one of the most important aspects necessary to involve in the further development of the food chain from a producer perspective according to the interviewee's in this project. How the new Swedish Food Strategy is presented is therefore a very interesting piece of information that could add another dimension to the presented problem in this project.

To get a broader description of the producer perspective it would be beneficial, as reflected upon in chapter 8.2, to develop this study further by interviewing a larger number of case companies in agricultural sector and in food manufacturing sector. Also, creating more knowledge about how widespread the experience is of KRAV labeled products on food retail orders being sold as conventional products is something that after the discussion above would be important to have a better basis to facilitate the transition to a more sustainable food chain.

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Appendix 1. Interview guide

Introduction
Ask if it is OK for interviewee that the interview is recorded. Inform about GDPR, what happens after interview, that it is possible to withdraw consent anytime until publication.
Tell a little bit about the case study
Ask the interviewees to give a brief presentation about their business, how and when did you start? Who are your customers? How does your supply chain look like?

RQ 1:

Strategic management
Starting off with questions regarding business strategy and development.
How do you see your business development?
Do you have a business strategy? What is it?
If yes: Have you changed your business strategy the last years? Why/Why not?
Have these changes been because of circumstances outside the company?

Power and Dependency within supply chain (RDT)
Short presentation about power and dependency concept
Do you have customers and suppliers that are extra important to you? If yes, why? If no, why not?
What is power and dependency to you?
How do you think that power and dependency is illustrated between companies in general in food industry?
Do you think that your suppliers are dependent of you?
Do you think that your customers are dependent of you?
Are you dependent on food retail for continuing "business as usual"?
Have you perceived that customers or suppliers has power over you in some way? How?

Relationships (RDT)
How is your relationship with food retail?
Do you actively work on improving your relationship?
Who initiates negotiations, you or food retail?
Do you feel equal with food retail in negotiations?

Perception of private label
As a producer, what are your opinions about private label products in general?
Do you experience your business development being affected by the increase of private label products? How?
What do you think the effects of private label increase are in the long-term?
Who do you think are responsible for these long-term effects?

RQ 2:
Trade-offs
What main value do you deliver to your customers?
Shared value – does your value offer benefit your customers /food retails value offer?

Partnership

What do you think is the best way for food retail and small food producers to collaborate?
Which factors needs to change/be made in order for this to be possible?
How can grocery stores and smaller food producers...
… build better trust?
… create cooperative advantages i.e. create advantages through cooperation that benefit both parts equal?
... what could a new system look like for the cooperation between the grocery store and the food producer?
.. how could this system change the market? Both for the producer and for the grocery store
… do political rules and laws need to change for this to be possible?

Interview guide translated to Swedish:

Introduktion

Fråga om godkännande för att spela in intervjun. Informera om GDPR, vad som händer efter intervjun samt att det är möjligt att dra tillbaka sitt medverkande när som helst fram till publicering.
Kort presentation om projektet
Be respondenten presentera sitt företag lite kort. När och hur startade ni? Vilka är era kunder? Hur ser er leverantörskedja ut?

Strategi

Hur har ert företags utveckling sett ut senaste åren?
Har ni en företagsstrategi och vad är den i så fall?
Om ja: har ni ändrat er affärsstrategi senaste åren? Varför/Varför inte?
Har dessa förändringar varit på grund av omständigheter utanför företaget?

Makt och beroende

Har ni kunder som är extra viktiga för er? Varför/Varför inte?
Vad betyder makt för er om du sätter det i kontext till de relationer ert företag har med kunder och leverantörer?
Vad betyder beroende för er sett ur samma kontext som ovan?
Tror du att era kunder är beroende av er?
Tror du att era kunder känner en makt över er?
Är ni beroende av dagligvaruhandeln för att kunna fortsätta ”business as usual”?
Har ni upplevt att kunder har makt över er på något vis? Hur?
Hur tror du att makt och beroende utspelar sig mellan företag generellt inom just livsmedelsindustrin?

Relationer

Hur är er relation med dagligvaruhandeln?
Arbetar ni aktivt för att förbättra er relation med dagligvaruhandeln? Hur?
Vem tar initiativ till förhandlingar, ni eller dagligvaruhandeln? Varför är det så?
Upplever du att ni är jämlikar med dagligvaruhandeln i er relation?
Upplever du att ni är jämlikar med dagligvaruhandeln i förhandlingar?

Private label

Som producent, vad är era åsikter om EMV produkter generellt?

Har ni upplevt att ert företags utveckling påverkats av ökningen av EMV produkter i dagligvaruhandeln? Hur? Varför/inte?
Vad tror du är den långsiktiga effekten av ökad andel EMV produkter i dagligvaruhandeln?
Vem tycker du är ansvarig för dessa långsiktiga effekter?

Värdeskapande
Vilket värde skapar ni för era kunder?
Vad är det för värde era produkter erbjuder?
Är ert värdeerbjudande något som gynnar era kunder/dagligvaruhandelns egna värdeerbjudande?

Partnership
Detta är den avslutande frågan där du uppmanas tänka helt fritt, bortom regleringar och helt enkelt "utanför boxen" – det finns inget rätt eller fel här!

Vilket tror du är det bästa sättet för dagligvaruhandeln och mindre livsmedelsproducenter att samarbeta?
Vilka faktorer är extra viktiga för att detta samarbete ska vara möjligt?
Hur kan dagligvaruhandeln och mindre livsmedelsproducenter…
… bygga bättre tillit?
… skapa samarbetsfördelar, alltså skapa fördelar genom samarbete som gynnar bägge parter lika mycket?
… hur skulle ett nytt system kunna se ut för samarbetet mellan dagligvaruhandeln och livsmedelsproducenten?
.. hur skulle detta system kunna förändra marknaden? Både för producenten och för dagligvaruhandeln
… vilka politiska regler och lagar behöver förändras för att detta ska vara möjligt?

Appendix 2. Coding procedure

Table 7. Step of process in analyzing interviews

Thematic analysis	Step of process
1	Transcribe interview 1
2	Transcribe interview 2
3	Sorts the thematic answers to each theme, which were developed from the theory chapter when creating the interview guide, for interview 1 and 2
4	Read through mail interview 3
5	Sort thematic answers interview 3
6	Review repeated words interview 1, 2 and 3 (Table 3)
7	Read through mail interview 4
8	Sort thematic answers interview 4
9	Review repeated words interview 4

Table 8. How categories where created through coding from the interviewee's answers to each theme's questions

Theme	Questions	Category
Business strategy	1.How do you see your business development? 2.Do you have a business strategy? What is it? 3.Have you changed your business strategy the last years? Why/Why not? 4.Have these changes been because of circumstances outside the company?	Involve external partners Changed demand, consumer behavior Price pressure in chain
Power and dependency	1.Do you have customers and suppliers that are extra important to you? If yes, why? If no, why not? 2.What is power and dependency to you? 3.How do you think that power and dependency is illustrated between companies in general in food industry? 4.Do you think that your suppliers are dependent of you? 5.Do you think that your customers are dependent of you? 6.Are you dependent on food retail for continuing "business as usual"? 7.Have you perceived that customers or suppliers has power over you in some way? How?	Dependent on food retail for continuing business as usual = 4 No other buyer situation increases dependency on food retail Different customers do care about their supplier to different degrees dependent on size of customer/nr of suppliers Product exposure in food retail store
Relationship	1.How are your relationship with food retail? 2.Do you actively work on improving your relationship? 3.Who initiates negotiations, you or food retail? 4.Do you feel equal with food retail in negotiations?	Less appreciated than central agreement suppliers A "Far away" – relationship No initiative for improving relationship
Private Label	1.As a producer, what are your opinions about private label products in general? 2.Do you experience your business development being affected by the increase of private label products? How? 3.What do you think the effects of private label increase	Price pressure Damages value for sustainable products (KRAV, Eco) Politics

	are in the long-term? 4.Who do you think are responsible for these long-term effects?	Both positive and negative, depends on origin of product and production Responsible food retail: 4
Trade-offs	1.What main value do you deliver to your customers? 2.Shared value – does your value offer benefit your customers /food retails value offer?	Sustainability (production, product) Premium segment Needs improvement
Partnership	1.What do you think is the best way for food retail and small food producers to collaborate? 2.Which factors needs to change/be made in order for this to be possible? 3. How can grocery stores and smaller food producers... … build better trust? … create cooperative advantages i.e. create advantages through cooperation that benefit both parts equal? ... what could a new system look like for the cooperation between the grocery store and the food producer? .. how could this system change the market? Both for the producer and for the grocery store … do political rules and laws need to change for this to be possible?	Consensus that leads to co-operation Communication, long-term, cost-effective Regulations, politics Decrease power food retail Take use of old attempts

Appendix 3. Letter of consent

Samtyckeblankett: Personuppgiftsbehandling i studentarbeten

När du medverkar i arbetet med examensarbete ”Private label effect on small producer business development – a multiple-case study from a producer perspective” innebär det att SLU behandlar dina personuppgifter. Att ge SLU ditt samtycke är helt frivilligt, men utan behandlingen av dina personuppgifter kan inte forskningen genomföras. Denna blankett syftar till att ge dig all information som behövs för att du ska kunna ta ställning till om du vill ge ditt samtycke till att SLU hanterar dina personuppgifter eller inte.
Du har alltid rätt att ta tillbaka ditt samtycke utan att behöva ge några skäl för detta. SLU är ansvarig för behandlingen av dina personuppgifter, och du når SLUs dataskyddsombud på dataskydd@slu.se eller via 018-67 20 90.

Din kontaktperson för detta arbete är: Emelie Lundberg, eelg0003@stud.slu.se, 0707983598.
Vi samlar in följande uppgifter om dig: För- och efternamn, ljud och text från intervjutillfället, mejladress och telefonnummer.
Ändamålet med behandlingen av dina personuppgifter är att SLUs student ska kunna genomföra sitt examensarbete enligt korrekt vetenskaplig metod och bidra till forskning på handel av närproducerad mat och producentvärderingar. Examensarbetet publiceras i en öppen databas (Epsilon).
Om du vill läsa mer information om hur SLU behandlar personuppgifter och om dina rättigheter kan du hitta den informationen på www.slu.se/personuppgifter.

☐ Jag samtycker till att SLU behandlar personuppgifter om mig på det sätt som förklaras i denna text, inklusive känsliga uppgifter om jag lämnar sådana.

____

Underskrift Plats, datum

____

Namnförtydligande

Appendix 4. GDPR

2023-03-31

Sveriges lantbruksuniversitet
Swedish University of Agricultural Sciences

Institutionen för företagsekonomi

Till: Medverkande i masteruppsats
VT 2023

Personuppgiftsansvarig
Sveriges lantbruksuniversitet (SLU) är personuppgiftsansvarig för behandlingen av dina personuppgifter. Kontaktperson för denna behandling är: Emelie Lundberg, eelg0003@stud.slu.se. Du kan också kontakta handledaren, Cecilia Mark-Herbert , på mail cecilia.mark-herbert@slu.se.
Du kan nå SLUs dataskyddsombud på dataskydd@slu.se.

Ändamål
Dina personuppgifter behandlas av SLU för att Emelie Lundberg ska kunna genomföra sitt studentarbete i ekonomi med god vetenskaplig kvalitet. Dina personuppgifter kommer att ersättas av en kod för att det inte ska gå att se vem en personuppgift handlar om.

Rättslig grund
Behandlingen av dina personuppgifter är nödvändig för att SLUs studenter ska kunna utföra sina studentarbeten med hög vetenskaplig kvalitet. SLUs utbildning är reglerad i lag. Behandlingen av dina personuppgifter är därför nödvändig för att SLU ska kunna utföra en uppgift av allmänt intresse.

Överföring av personuppgifter
Inga personuppgifter kommer att överföras till organisationer eller företag utanför SLU.

Lagring
Dina personuppgifter kommer att lagras till dess studentarbetet är färdigt och betyg har satts på arbetet.

Dina rättigheter
Du har enligt lag rätt att under vissa omständigheter få dina uppgifter raderade, rättade, begränsade och att få tillgång till de personuppgifter som behandlas, samt rätten att invända mot behandlingen. För att använda dig av dina rättigheter, kontakta integritets- och dataskyddsfunktionen med kontaktuppgifterna nedan.

Synpunkter och klagomål
Om du har synpunkter på SLUs personuppgiftsbehandling kan du vända dig till integritets- och dataskyddsfunktionen på dataskydd@slu.se, 018-67 20 90.
Om du inte är nöjd med SLUs svar, kan du vända dig med klagomål på SLUs behandling av dina personuppgifter till Datainspektionen, datainspektionen@datainspektionen.se eller 08-657 61 00.
Du kan läsa mer om datainspektionens tillsyn på http://www.datainspektionen.se/

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