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The Swedish alcohol monopoly: A bottleneck for microbrewers in Sweden?

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Abstract: The evolution of the craft beer sector has been gaining traction around the world since the 1980s, developing from factors such as an increased demand for alternative and locally distinct flavours in beer, increased interest in pairing food with the right type of beer, and increased income levels. Meanwhile, the economic and political contexts for establishing and running craft breweries differ between cities, regions, and nations. This study takes its point of departure from the producer perspective of the craft beer sector in the alcohol monopoly of Sweden, where the interest in craft breweries has also developed quickly over the last decades. The main purpose of the study is to contribute to the understanding of producer perspectives on operating in an alcohol monopoly, and how this effects development opportunities. The study has an explorative, mixed methods approach and is based on a survey encompassing all Swedish craft brewers as well as qualitative data from northern Sweden, including interviews with craft beer producers, site visits, and document analysis. The conclusions provide a complex picture of the Swedish alcohol monopoly and its impact on the craft brewers, and hence the development of the craft beer sector. However, the critical dimensions are more pronounced among the producers, suggesting that the Swedish organisation favours large-scale breweries, creates uncertain market conditions, leads to quick and unexpected decisions, and creates logistical difficulties. From an international comparative dimension, this indicates that the craft beer sector in Sweden could benefit from and grow even stronger with modifications to the market conditions according to the situation in other geographical contexts.

ABOUT THE AUTHORS

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PUBLIC INTEREST STATEMENT

The craft beer sector has been rapidly growing during the last decades and is now a complement to larger, industrial breweries across the world. This means that both production and consumption patterns of the brewing sector are constantly changing, and the sector needs further understanding. In this study, the authors are adding a contribution on producer perspectives on craft beer policy from Sweden. The conclusions highlight a policy, which producers believe is mostly designed for large scale, industrial breweries, and that could be modified in order to be more oriented towards craft breweries.

Subjects: European Studies; Food and Beverage Management; Transport; Tourism Planning and Policy; Politics & Development; Regional Development; Political Economy

Keywords: Craft beer; small business; economic development; alcohol policy; Sweden

1. Introduction

The development of the brewing sector has changed dramatically over the past few decades, as a rapidly growing number of craft breweries now challenge and supplement the dominant multinational brewing giants. This change has taken place around the world, with many pinpointing the US in the 1980s as the starting point (Garaviglia & Swinnen, 2018; Michael. et al., 2016). This trend has since spread across countries in Europe (Cabras & Higgins, 2016; Danson et al., 2105; Garaviglia & Swinnen, 2018), Australia (Callejo et al., 2019), and other geographical contexts such as South America (Toro-Gonzalez, 2018) and China (Li et al., 2018).

The background of this change in the brewing sector can be traced to dimensions such as an increased demand for flavours in beer beyond the generic, mass-produced beer (Flack, 1997; Gatrell et al., 2018), a search for more locally distinct flavours in food and beverages (Kneafsey et al., 2008; Sjölander-Lindqvist et al., 2019), and new variations in packaging (Elzinga et al., 2015). It is also connected to an increased interest in pairing different types of food with the right type of beer (Bamforth & Cabras, 2016) as well as higher income, enabling the consumption of craft beer, which is often priced much higher than traditional, mass-produced beer (Garaviglia & Swinnen, 2018).

At the same time, the economic and political contexts, as well as the support systems for establishing and running craft breweries, differ between cities, regions, and nations. For example, the city of San Diego offers economic grants and loan opportunities for craft brewers in order to increase the amount of local businesses in the sector (Cabras & Higgins, 2016). In several US states and some European countries, taxation for small breweries is lower than for large-scale brewers, and regulations have often recently been modified to create better conditions for small-scale brewers to sell their products (Cappellano & Spisto, 2019; Elzinga et al., 2015; Williams, 2017). On this topic, Malone and Lusk (2016) highlight how regulatory constraints negatively impact craft breweries and the fact that the opportunity for brewers to sell directly to consumers increases the number of breweries.

The current study takes its point of departure from the specific regulatory context that sets the prerequisites for the development of the craft beer sector in Sweden, where the increase in craft breweries matches the pace of most other international craft beer contexts. Sweden is a country with a long history of strict alcohol laws and regulations, and Sweden's alcohol monopoly is one of few that still exist, with Systembolaget being the only organisation authorised to sell alcohol products above 3.5% alcohol strength outside of bars or restaurants. This study explores craft beer producer perspectives on the Swedish alcohol monopoly, thereby contributing to the nascent and developing Swedish research on this sector, and it also adds to previous policy research on the sector.

2. Methods and sampling

The study has an explorative, mixed method approach and was undertaken between 2018 and 2020. The pragmatic approach applied in choosing mixed methods was based upon the objective to respond to the study purpose in the best possible way. Here, mixed method is defined as linking qualitative and quantitative data to provide a unified understanding of the research problem. (Creswell & Garrett, 2008; Felzer, 2010) Using both qualitative and quantitative data is the most prevalent mixed method, allowing more confidence in results, and is used in order to complement contextual understanding to abstract descriptions (Jick, 1979).

The data corpus consists of a survey with questions about financing, marketing, entrepreneurship, and policy dimensions, which was sent to all registered craft brewers in Sweden that could be identified (N = 375). This survey was conducted together with colleagues working together in several craft beer research projects simultaneously, and the data is also being used to write articles on other topics related to the craft beer sector in Sweden. The main purpose of the web-based survey was to establish a broad picture of the so far relatively unstudied craft brewing sector in Sweden. Altogether, the survey consisted of 93 questions, and it had a response rate of 36% (146 of 375 breweries, whereof 136 concluded the entire survey and 210 never entered the web platform). This response rate indicates a platform that enables a credible representation of the Swedish craft beer sector.

The quantitative data was complemented by 18 semi-structured interviews with craft beer producers in rural contexts in northern Sweden, focusing on the same perspectives as the survey. The interviews were undertaken within a time span stretching from the end of 2018 until the end of 2020. This rural and peripheral area hosts a large number of craft breweries per capita in spite of the strict nature of the Swedish alcohol policy. The quantitative data was used to develop an overall descriptive picture of producer perspectives on policy, whereas the qualitative data helped establish a more contextual understanding of the sector and its businesses. The qualitative interviews took between 40 and 60 minutes each, and 12 of them were undertaken on site at the breweries. The data collection also included a seminar with brewers including feedback on presented data findings, as well as document analysis, such as craft brewer websites and reports from craft beer official organizations. All of the primary data gathering was preceded by informing the respondents of the intentions with the study, which is to establish a knowledge foundation on the craft beer sector in Sweden, and publish scientific papers on this topic.

The combined quantitative and qualitative dataset was analysed and coded, and thereafter categorized into thematic categories according to patterns identified while processing it. The coding consisted of iterative processes leading to the extraction of four themes, which best expressed the connection with the purpose and the results of the findings. (Braun & Clarke, 2006; Merriam, 1998)

3. The evolution of the craft beer sector

Some people claim that the craft beer evolution was started by Fritz Maytag as early as the 1960s with the Anchor Brewing Company in San Francisco (Callejo et al., 2019), whereas others point to the 1982 Great American Beer Festival in Boulder, Colorado as the starting point (Great American Beer Festival, 2020; Michael. et al., 2016). The implications of the growth of the sector include a variety of development opportunities, such as craft beer trails, other types of income linked to tourism (Kraftchick et al., 2014; Alonso & Sakellarios, 2017; Murray & Kline, 2015; Fletchall, 2016), and also the potential for place branding (Eberts, 2014; Gatrell et al., 2018). Studies also point out that craft breweries and concentrations thereof are important drivers of economic growth, as they contribute to the levels of place attractiveness, entrepreneurship, employment and place revitalisation, and thus contribute to local economic development (Florida, 2017; Nilsson et al., 2018; Reid, 2018). On this topic, Miller et al. (2019) studied the estimated contribution of the craft beer sector to the state of Michigan's economy, finding a sizeable contribution of almost 500 million dollars per year.

Several scholars have pointed to craft brewers as lifestyle entrepreneurs, running their businesses based largely on an inherent enthusiasm and passion for the craft itself (Reid & Gatrell, 2017; Thurnell-Read, 2014). Others point to the fact that the ambition to contribute to local community development ranks among the reasons craft brewers give for starting their business, ambitions often carried out through intense networking with other brewers as well as other businesses in the craft food sector (Reid, 2018; Skoglund & Sjölander-Lindqvist, 2019)

As the craft beer sector has been shown to offer opportunities for local and regional economic development, contextual policy dimensions have increased in relevance. On this topic, studies by, for example, Cabras and Higgins (2016), Williams (2017), and Cappellano and Spisto (2019), highlight how policy changes have been made to support entrepreneurs in the craft beer sector, thus enabling further growth in the sector. Examples of this include removing restrictions and legalising home brewing in the US in 1979, contributing to the evolving of a viable business sector (Mccullough et al., 2018; Nilsson et al., 2018). Cappellano and Spisto (2019) illustrate how a political climate friendly to the craft beer industry has triggered the US movement through tax incentives and even grants in San Diego, which has allowed the number of breweries to grow. Williams (2017) case study of North Carolina's craft beer sector shows that the sector is able to grow faster in states with less regulated distribution systems and lower taxes on craft beer. Moreover, Malone and Hall (2017) suggest that a West Virginia change of legislation, allowing sales for off premises consumption and sampling on brewery premises, would improve the regional economy for example, by increasing wages for employees in the hospitality and leisure sectors. Fastighi et al. (2015) describe how the 1995 reduction in legislative complexity led Italy to be the first European country to follow the US example in facilitating the growth of the craft beer industry. Similarly, Cabras and Higgins (2016) highlight how the craft beer markets in Germany and Spain have grown thanks to rate relief and financial grants from local governments. Other examples of policy adaptions to support the craft beer sector include several US cities, which have undertaken measures to promote the growth of the craft beer sector. In Louisville, the mayor's office identified a number of measures to grow the sector: develop a beer trail map, more tolerant alcohol beverage control laws, representation of local breweries in city events, and the development of tools to reconnect with local brewing heritage. These are measures that have been replicated in large and small communities across the US in order to simplify the establishment and operation of craft breweries. (Reid & Gatrell, 2017) Further studies on the topic include Elzinga et al. (2015), who pointed out the connection between higher taxes and reduced craft beer production, whereas Malone and Lusk (2016) conclude that there are more breweries where market access is easier and regulatory constraints fewer.

The Swedish craft beer development has to a large extent followed the path of the US, the UK, Italy, and other countries where the sector has grown rapidly during the last few decades. In Sweden, the number of breweries has increased from only 20 in 1990 to around 400 in 2018 (Sverges Bryggerier, 2020). The background of this sector's growth from a Swedish perspective is still relatively unexplored from a research position. Sandberg (2010) has described the decline of small breweries and strong consolidation of the industry from 1890 up till 1975. Box (2017) studies of business entries into the Swedish brewing industry from 1830 to 2012 points out that the decline of the number of breweries continued until the late 1980s. After that, initial moderate increases could be detected, accountable to the new craft beer phase and also the relaxation of alcohol legislation (Halkier et al., 2017). On the growth of craft beer in Sweden, studies are scarce, but producer studies have shown that entrepreneurship is driven by enthusiasm and passion for crafting more than profits, and that many of the brewers have an ambition to contribute to local development. Also, the brewers are often combinateurs, i.e., having another job on the side, they often fund their operations through different so-called bootstrapping methods, and they often work in networks in close cooperation with each other and other craft food businesses. (Sjölander-Lindqvist et al., 2019; Skoglund, 2019)

This study attempts to continue adding to the Swedish, and Scandinavian, research on craft beer. More specifically, it approaches the field from a craft producer perspective, with a particular focus on policy, where the specific characteristics of Sweden make it a particularly interesting context to study. These characteristics are centred around the fact that Sweden possesses one of the last remaining alcohol monopolies. The monopoly means that outside of direct consumption at restaurants and bars, one can only purchase alcoholic beverages at one store in the country, Systembolaget. This background creates a rather unique setting, which together with the lack of a rich research foundation into Swedish craft beer, makes exploratory studies most suitable.

The following section describes this context, laying the foundation for the mixed methods study that examines how the national policy and sales conditions in the country are viewed by the continuously growing number of craft brewers in the country.

4. Swedish alcohol policy and Systembolaget—the world's largest buyer of alcohol beverages

When it comes to alcohol, Sweden is a country with a long history of strict laws and policies. The first major regulations date back to 1638 (Nordisk familjebok, 1905) and the introduction of a tax on liquor, which at the time was produced in large amounts in each and every home. In addition to being an attempt to decrease drinking, the government needed the tax revenues as well as the potatoes used for liquor production, which could instead be used for bread and food (Johansson, 2008). Despite this tax and a large number of other laws and regulations that would be introduced in the years to come, alcohol consumption continued to rise and the home production of alcohol was finally made illegal in 1860 (Johansson, 2008). At that time, alcohol abuse was a tremendous public health problem and during the period of industrialisation, the problem became even worse. In the early 1890s, further legal interventions aiming to stop drunkenness and improve social order were introduced and several different restrictions were imposed over the following decades (Box, 2017). In 1917, the government introduced a new tool to come to terms with the ongoing problems associated with alcohol abuse—the passbook. With a personal passbook, Swedes were allowed to buy a certain amount of alcohol; healthy men with a job could purchase on average 3 l of liquor per month (Johansson, 2008). The politically and socially more liberal attitudes toward alcohol after the World War II (Box, 2017), in combination with massive critique of the passbook, led to an abandon of the passbook in 1955 which also is the same year that the new core of the Swedish alcohol monopoly, Systembolaget, was founded. Systembolaget has since been the country's only retailer of alcoholic beverages stronger than 3.5% alcohol, and is today the world's largest buyer of alcohol products from all over the world, offering a wide range of quality-assured products, from beer to wine and liquor, in around 900 stores around Sweden (Systembolaget, 2020).

The formal process for a beer brewer in Sweden, regardless if you are a craft brewer or a multinational brewer giant to reach the shelves of Systembolaget consists of several different steps. To start with, a brewer needs to have a company registered in Sweden with a licence to trade in alcohol (Sveriges Mikrobryggerier, 2020). Once this is done, a brewer can apply to become a certified Systembolaget supplier by completing different courses and by signing a number of contracts and agreements where suppliers promise to follow the directives and code of conduct of Systembolaget. If everything is correct and complete after these steps, your company can be approved to start supplying beer to Systembolaget. Note that this does not mean that Systembolaget will purchase anything, only that Systembolaget is allowed to purchase your products.

The purchasing process at the Systembolaget is formalised and includes a number of steps which can be summarised as follows: An analysis of the Swedish market is compiled and presented by Systembolaget in an annual launch strategy, which together with requests for tenders are made available for all certified beverage suppliers. Suppliers may then send in product samples to Systembolaget's tasting panel. The blind tasting panel compares the product with the tender, selects products based on quality, and sends the beer for chemical analysis at the Systembolaget laboratory. The product that has the highest quality and corresponds best to the tasting profile described in the request for tender is the product that is ultimately launched. A quality control follow-up, based on both sensory analysis and chemical analysis, is performed by Systembolaget's laboratory just prior to launch to make sure that the product delivered to the stores is identical to the product that was presented in the tender tasting. All products launched are then regularly evaluated, and the level of distribution is changed to respond to consumer demand.

The process for a beer brewer in Sweden to reach Systembolaget is hence long and complicated, and the process differs in how it affects large-scale versus small-scale brewers. This was highlighted by the EU in 2014, and after the process was subject of criticism, it was partly modified to facilitate the entry of small-scale brewers in Sweden by introducing a "small-scale alternative". This alternative selection required a beer to be a craft beer (non-industrial), produced by a small-scale business, and that the total yearly beer production amounts to less than 50,000 l. If this is the case, which it is for many micro-brewers, an alternative but limited route to Systembolaget is open. The micro-brewer still needs to follow all steps and become a certified supplier, but instead of entering Systembolaget's formal purchasing process, the micro-brewer can, if the product fulfils Systembolagets quality standards, deliver the product directly to one or a few of Systembolaget's local stores. Systembolaget decides which store the product may be delivered to and the number of stores (maximum 10). The argument for this "small scale alternative", as described by Systembolaget, is that the monopoly wants to offer their customers local alternatives and to provide smaller local brewers with an opportunity to test their products on a smaller scale. In 2018, Systembolaget sold craft beers from a total of 242 local breweries. (Systembolaget, 2020)

Other highly relevant dimensions of the Swedish context for craft brewers are pricing and marketing. The price setting process at Systembolaget, regardless if it is a craft beer or a beer from a multinational large-scale brewer, starts with the producer setting the price he or she wants to get paid per unit from Systembolaget. Added to that price is a fee from Systembolaget, a governmental alcohol tax, and VAT. So, if a producer sells a beer to Systembolaget for one euro, Systembolaget adds a fee of 40%, 33% alcohol tax, and 60% VAT. This means a consumer price of around three euros, a high price in comparison to large brewers with economies of scale possibilities. (Systembolaget, 2020) It also means one of the highest levels of taxation for beer (no 7 anno 2018) in the world (Anderson, 2019). Another factor in sales and pricing is Swedish legislation on alcohol marketing, which also has effects on the craft brewing sector, as it demands moderation. Here, the meaning of moderation includes the following: marketing may not be reaching out to consumers or encourage alcohol consumption; brewers are not allowed to beautify or glamorize the taste of their products, connect it to certain harmonious atmospheres or activities, or offer discounts (Konsumentverket, 2020).

Given the long process of getting a product on Systembolaget's shelves, it is reasonable to assume that the presence of an alcohol monopoly and Systembolaget causes craft beer producers in Sweden to face challenges that micro-brewers in other countries do not. On the one hand, the alcohol monopoly could facilitate the entry of small-scale brewers since it reduces the number of stakeholders to consider. On the other hand, the monopoly could present an obstacle, hindering the growth and development of the craft beer sector. As can be seen from the data analysis, both of these perspectives are supported in different ways.

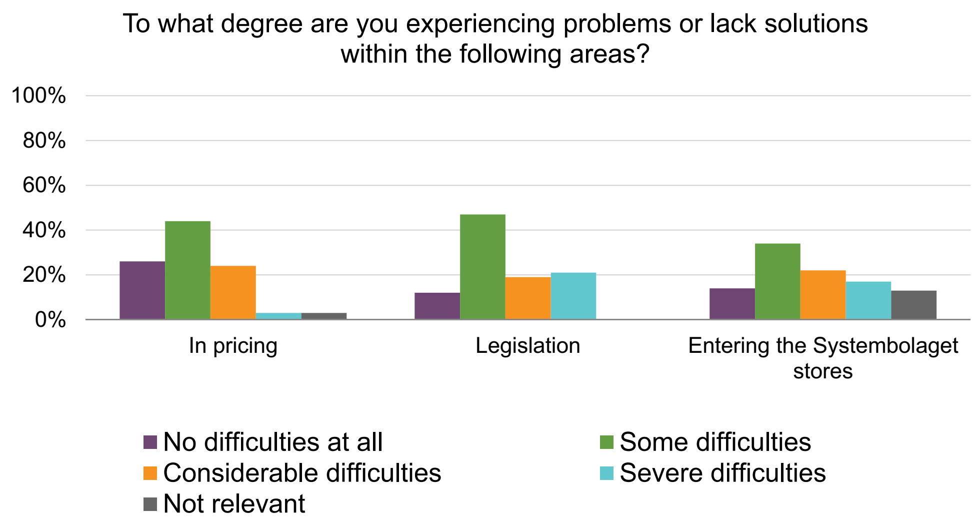
5. Empirical findings on craft brewing and policy in Sweden

To enable conclusions in line with the purpose of this study, the authors opted to employ a mixed methods approach. This approach allowed the authors to develop a broad description of the attitudes and perspectives of the craft brewers, as well as a qualitative understanding of perspectives within the craft brewing sector on Swedish alcohol policy and Systembolaget. The sections below are organized accordingly, with a descriptive summary of the quantitative survey, followed by an account of the qualitative inquiry. The analysed, coded, and categorized mixed-method results were ultimately thematised into a resulting four themes that best express the study findings.

The quantitative data collection for this study consists of a survey sent to all 375 registered craft brewers in Sweden that could be identified and resulted in 136 responses, corresponding to a 36% response rate. With 96% of the respondents having introduced their beer commercially, the relevance of the survey for the commercial craft beer sector is apparent. Also, 78% of the craft brewers sell their beer at Systembolaget, which indicates that Systembolaget is a central source of income and is by far the most relevant source of revenue for the craft beer sector. This further elevates the need to know more about how the alcohol monopoly is perceived by the sector, which is further elaborated in Figure 1.

Figure 1 illustrates that 47% of the brewers view alcohol legislation in Sweden as somewhat problematic, 19% view it as causing considerable problems, whereas 21% view it as causing severe

Figure 1. Craft brewer's experiences of Swedish alcohol policy and legislation.



difficulties for their operations. Notable is also that only 12% have no issues with the legislation. The legislative dimension of craft brewing was also integrated in the free-text questions of the survey, with one question asking for the brewers perspectives on obstacles and opportunities for developing the craft brewing sector. Out of 84 responses to this question, 31% raised the importance of allowing direct trade on brewery site as highly important for their development, and 36% view the high alcohol tax in Sweden as unfair. Many refer to other countries in Europe with better opportunities, having a differentiated tax for small brewers and allowing direct sales to consumers. The other responses mostly relate to the need for a more relaxed alcohol policy in Sweden, including a more flexible Systembolaget. These obstacles are also elevated in the free-text question related to expansion possibilities for each particular brewery, where 34% out of 83 responses point out policy and legislative dimensions as the main problem. Here, several compare to a more favourable situation in the rest of Europe regarding lower taxes, and direct sales at the brewery premises. Another issue on legislation are the limitations on marketing imposed on the sales of alcohol. On this topic, 16 responses out of 30 point out policy and Systembolaget as limiting their operations. Several of these point out how allowing direct sales would improve their connections with consumers. Some of the answers also highlight how Systembolaget is difficult to interact with in terms of often changing conditions and demands regarding the products and logistics.

Regarding the opportunity to access the product shelves of Systembolaget, Figure 1 illustrates that 34% see this as causing difficulties for their operations, whereas 22% view it as causing considerable difficulties, and 17% view it as a major problem. Only 15% of the brewers see no obstacles in accessing Systembolagets stores with their products. In the free-text question on obstacles and opportunities for developing the craft brewing sector, 18 out of the 84 responses elevate major problems in connection with Systembolaget and reaching their shelves with their products. Many of these stresses how Systembolaget is not designed for small, craft brewers, but rather for the larger industrial breweries, which can deliver large volumes of beer with competitive advantages such as economies of scale and a well-developed distribution system. One of the dimensions the brewers elevate in this context is the distribution of their products to Systembolaget's stores, where almost 90% connect this with problems for their deliveries and operations. However, several of the responses also point towards the possibility to introduce a combination of direct sales to consumers on the brewery sites with keeping Systembolaget as an institution. This means that some of the brewers don't see Systembolaget as causing major difficulties, at least if they make it into its product range.

On the pricing and the sales process for craft brewing, many view the legislation framing these dimensions, as well as Systembolaget, as contributing to big problems. Figure 1 shows that 44% see the pricing of craft beer, with taxes and fees, as problematic, 24% associate this with considerable difficulties, and 3% see it as severely troublesome. In the free text of the survey, many relate to Systembolaget on this aspect. Here, some view it as reliable and easy to handle regarding the sales process, but troublesome in terms of other rules and flexibility. Among 83 responses to the question on obstacles for expansion for each of the respondents particular brewery, over 30% raise the complicated procedures related to accessing Systembolaget as a major issue. However, the free-text answers on the question on obstacles for the development of the craft brewing sector, mostly point towards high taxation as the largest problem. Here, 46% out of 84 respondents elevate a modified taxation, for example, a lower tax for craft brewers, as crucial for the sector.

Altogether, the responses from the survey reveal that a majority of Swedish craft brewers view Systembolaget and the policy governing this organisation and alcoholic beverage sales in Sweden as highly problematic. Most of the concerns relate to difficulties reaching the shelves of Systembolaget, the need to allow and enable direct sales to consumers on the brewery sites, and the high taxes that leads to very highly priced products (that thus become hard to sell and therefore hard to make a living on).

The qualitative study enabled the authors to develop a complemented understanding of the craft brewing sector. The data show that the studied region has seen a dramatic increase in the number of breweries over the last decade. The inquired breweries are all characterised by their small scale, employing one to ten people, and they are all brewing well below the cut-off for being considered a craft brewer according to international standards (6 million barrels) (American Brewers Association, n.a.). Other general characteristics of the interviewed breweries are that they all started between the years of 1996 and 2017, indicating fairly young companies, albeit some of them have survived many start-up challenges having been around for over ten years. The brewers are often so-called combinateurs, i.e., they have other employment or business activities (often a restaurant), they are driven by their enthusiasm and passion to create different types of ales and are often inspired by American craft beer trends. The combinateur role is often the result of the hard competition, making it difficult to work solely with developing the craft beer business.

Most of the brewers have started out using so-called alternative, bootstrapping financing methods in their early years. This type of financing the business includes applying for grants, working on your spare time, financing the operations through another employment, having friends and family assist in production, as well as using private savings, or borrowing money from the social proximity in order to avoid large debts to banks or other credit institutions. The reason for using this type of funding is also partly due to the difficulty to reach production volumes, revenues, and profits that enable an entrepreneur in the craft beer to live on the his or her business operations. This kind of networking can also be seen in other parts of the sector where there are possibilities to obtain alternative and less costly alternatives. One example of this is in marketing, where brewers often have people in the social proximity, such as family or friends, helping out with branding and labelling. This enables keeping costs down, a must in order to keep the business running. Another example is that many of the brewers work together with other local or regional craft brewers in tight networks around purchasing hops or barley, transportation, beer festivals or tap takeovers. One of the reasons for this networking is to better enable competing with the large-scale breweries, since the network cooperation reduces some of the costs and also increases efficiency compared to working on your own. However, several of the brewers also mention this part of their activities as one of the dimensions making it interesting and fun to work in the sector.

> We have coordinated transportation with other breweries to reduce the costs. We also order our grains and kegs with other breweries for this reason. (Brewer 1)

This quote goes in line with what several others of the producers also elevate, the difficulty of maintaining competitive in a highly rural context, particularly in the northern part of the country. This is mostly due to logistics and transportation, having to deliver to southern Sweden if one is to expand to a higher number of Systembolaget stores.

> The shipping is the largest cost when you produce small volumes. Therefore, we cooperate with other breweries on shipping to the Systembolaget warehouse. (Brewer 2)

Several of the brewers also express that this cooperation extends cost-cutting and also involves going to beer festivals together, arranging study visits to each other, and even helping each other with developing new beer recipes.

> We have a strong cooperation with other (small breweries) and our main competitors are the mega breweries that have dominated for fifty years. (Brewer 3)

The use of this strong networking among the craft brewers is hence a way to meet the problems and obstacles that these small businesses encounter in many dimensions of their operations. Several of the main problems arise from policy and dealing with Systembolaget. Logistics and transportation are, as mentioned above, part of these troublesome dimensions, since the brewers need to deliver to the central warehouse of Systembolaget in southern Sweden.

> The breweries close to the central warehouse in the South have a competitive advantage towards the ones located in the north or the very south of Sweden. (Brewer 4)

Another issue that brings about headaches for the brewers is the limiting legislation for marketing beer. This legislation means that the brewers aren't allowed to market their products in ways that could endanger the public health of the country. Many of the brewers see this as somewhat of a paradox, since they claim the legislation and Systembolaget in many ways favour large, industrial producers that can sell their beer much cheaper to the consumers. An example of this is when one brewery wanted to sell a new beer with a skier on the label:

> We wanted a beer with a somewhat athletic touch, and put a skier on the label, but this wasn´t allowed, it was against the alcohol legislation. (Brewer 4)

Reaching more consumers and creating a larger market is also one of the reasons several of the interviewed brewers are wanting direct sales to consumers at the brewery site to be allowed. This would allow a new type of consumption and market to develop, leading to opportunities to attract tourists and visitors, a development seen in many other countries across the world.

> We´re waiting for direct sales to consumers, that this will be legalized. (Brewer 5)

The rules, regulations, and legislation around producing and selling craft beer is hence something the brewers view as problematic. This includes the volumes that a brewer is capable of delivering to Systembolaget, and some of the brewers indicate that the larger breweries have advantages in dealing with them:

> The larger volumes you brew and deliver, the better agreements you are able to get with Systembolaget. This means that they can sell their beer at a much lower price. (Brewer 6)

They also mean that the conditions they have to adapt to have a tendency to be bureaucratic and change in rather rapid ways. These changes have involved the regulations on where and how the brewers are to transport and when the brewers are to send their seasonal beers. Many times this also makes the brewers having to send their Easter ale a long time before Easter, or their Christmas beer way ahead of Christmas. It also means having to deal with making quick decisions or actions, which impact their production processes on a long-term basis.

> As I was trying to get a couple of my beers into Systembolaget, it failed because I had made a slight mistake in the digital process on their web page. (Brewer 5)

Many of the perspectives brought up by the craft brewers are quite critical of the Swedish legislation and Systembolaget, but several of the brewers also bring up positive aspects of this way of organizing. For example, some of the brewers state that the understanding is improving successively, and Systembolaget is making more space for small, craft beer producers in the stores. Some also elevate the simplicity in dealing with one customer, being Systembolaget. And, as a brewery makes it to the shelves of Systembolaget, it has reached one of the larger retailers of alcohol in the world, which for many can lead to gigantic opportunities.

> What is good with Systembolaget is that you can deliver year-round, this means you make money continuously. (Brewer 7)

> If you reach Systembolaget with your beer, the potential is enormous. (Brewer 5)

To sum up the qualitative finding, most of the interviewed producers claim that Systembolaget and the legislation in its entirety favours large-scale producers. The voices that highlight the advantages of the Swedish organization point out the simplicity of working with only one large customer.

When aggregating the responses on policy dimensions and related aspects in this study, the quantitative data are coherent with the qualitative findings. In a conjoint analysis, the data shows that the craft brewers have varying perceptions and opinions on the impact of legislation, the alcohol monopoly, and particularly the role of Systembolaget. From the various responses that surfaced around the topic, the authors constructed four main themes that encompassed and captured the topics that were discussed the most.

5. Opportunities and obstacles -four themes summing up craft beer producer perspectives on the Swedish alcohol monopoly

5.1. Logistics and information

The rules for delivering to Systembolaget changed in 2014, allowing brewers to deliver to a number of their closest stores on their own. This was done in the context of new EU directives and in order to better serve the growing number of craft brewers. But the rules changed again, whereafter the brewers could deliver to a few nearby stores on their own (if a brewery's products sell well, they may get the opportunity to sell to more of the surrounding stores), but to reach the other stores, they had to deliver to Systembolagets central warehouse in the southern Swedish city of Örebro on their own. This is something most of the producers see as very troublesome and costly and something that severely impairs their competitiveness vis-a-vis larger breweries and breweries located closer to the central warehouse than breweries in the north of Sweden. This may lead the producers to lower their production or delivery volume. A further problem is that Systembolaget, with its extensive administrative requirements, demands tremendous foresight and planning. For small-scale brewers, it is difficult and costly having to plan and produce sometimes more than half a year in advance. This theme also encompasses the fact that many producers claim that the rules and regulations are unpredictable. They also say there is a lack of communication from Systembolaget to the brewers. In other words, they receive news concerning new conditions for their business activities from sources other than those who establish these conditions, such as other brewers. This means that the small craft brewers have a possible disadvantage in comparison with the larger scale brewers, that are perceived to secure information on possible changes much earlier.

5.2. Legislation and taxation impacts on marketing and pricing

The producers often use local stories and personalities in their branding and in their marketing efforts. This includes everything from mountain tops, regional wildlife, or friends characterised as superheroes, all to signal the local character of the product. Several of the brewers also attempted to use approaches that included sailing or skiing or different types of sports on the labels, but this was not allowed according to the directives of Systembolaget. Even though this may not be a major problem for the brewers, they feel that these control mechanisms and legislative directives hinder their creativity. Also, many of the brewers highlight how difficult it is to turn a profit by selling to Systembolaget. Systembolaget adds a considerable percentage before setting the price consumers see, which means the brewer is only able to keep 1 to 1.50 euros per beer. Further, the logistics of having only one store to sell to make prices go up and profits go down. As a result of pricing levels and procedures, some of the brewers claim the best way to sell beer is to do it yourself, i.e., to have your own restaurant, thereby keeping the portion of the price Systembolaget or other bars or restaurants take for themselves. This theme also includes the dissatisfaction that many of the brewers express regarding the high levels of taxation on small craft beer products in comparison with other European countries, where some countries have lower taxes for small craft breweries.

5.3. Cooperation and networking as ways to meet the monopoly and competition

In order to deal with the hard competition from large scale, industrial brewers and the challenges posed by the Swedish monopoly and Systembolaget, a key solution and approach is cooperation. This means that the small scale, craft brewers don't view each other as competitors. Rather, they help each other to keep up with the key competitor, large-scale industrial breweries. This cooperation on operations and activities has the capacity to both lower the costs and improve quality. It includes logistical solutions, sharing purchases of grains, or even buying grains from each other when you run out, mutual participating in festivals, and even meeting up to learn from each other on aspects from technology to recipes. This cooperation extends to other local businesses in the small-scale food sector and restaurants, and also on activities such as marketing and branding. It also includes bootstrapping methods to fund operations and lower costs. These include various shapes, from having friends and family help out in the brewery to searching for financing within the personal network. At the same time as cooperation and networking are necessary and bring about benefits, many of the brewers also elevate this dimension as something that brings about a high degree of pleasure in working with the brewery. The social dimension of small-scale craft brewing is hence something which brings personal fulfilment, at the same time as it is a necessity.

5.4. The upsides of Systembolaget for craft brewers

In the data used for this study, many brewers express concern and critique towards the conditions for craft brewing in Sweden. However, there are also quite a few points made by the brewers that credited positive aspects to Systembolaget. Most other countries that allow the sale of alcohol have a plethora of potential wholesalers or vendors through which brewers may market themselves in order to reach the market. In Sweden, there is only one, which provides consumers with well-stocked stores with a wide variety of products. Consumers can also be guaranteed that a product meets a certain quality standard if it is sold at Systembolaget, where personnel are also educated on the full range of products they sell. As well, this means that consumers have the opportunity to find small scale, locally produced beer at the Systembolaget stores. It also means that there is only one set of rules, allowing the producers to concentrate on a single set of codes for their sales, which makes the market access processes simpler. The monopoly's web service, which makes it possible for consumers to purchase over the internet, is another dimension that simplifies the process for consumers as well as producers. Hence, if a beer producer makes it into Systembolaget's product range (with its around 900 stores all over Sweden), the producer is, despite a complicated process, able to reach a lot of consumers that can rely on a high-quality control in their purchase.

6. Discussion and conclusions

The data upon which this article is based were extensive and rich in complexity and variety, encompassing many perspectives on being a craft beer producer in Sweden. The above themes sum up and integrate the most dominant responses on the Swedish alcohol monopoly, focusing on Systembolaget. It is evident that most of the brewers have a rather critical view of this monopoly, and some even prefer not to sell through Systembolaget at all, since they see it as overly complicated.

Although Sweden provides a somewhat complicated market for craft brewers, the brewers use a number of tools to maintain their businesses. Perhaps the strongest tool is the tight cooperation and networking that characterises the sector. This is a tool that allows brewers to be competitive in a market with large brewers and restrictive legislation. Networking between the craft brewers is commonly used in many ways and includes ways to manage difficulties caused by the monopoly and Systembolaget. Examples include cooperating on transportation and logistics in order to cut costs, joint purchasing agreements and sharing of barley and hops and teaming up for beer fairs and festivals. This illustrates unusually high levels of cooperation and networking compared to many other business sectors, and it also provides the brewers with more inspiration and knowledge to develop their products. However, it can also be seen as a response to a cumbersome situation created by the monopoly, where the craft brewers need all the help they can get just to maintain their business activities.

The conclusions provide a mixed portrait of the Swedish alcohol monopoly and its impact on the development of the craft beer sector. However, the critical dimensions are more pronounced among the craft brewers who claim that the Swedish monopoly: favours large-scale breweries; provides uncertain market conditions due to quick administrative changes within Systembolaget; creates a lack of control as Systembolaget changes its conditions without surveying the brewers; imposes severe logistical difficulties. Most of the brewers surveyed view the Systembolaget monopoly as an impediment to their brewery's development, and hence to the Swedish craft beer sector. From an international comparative dimension, this indicates that the craft beer sector in Sweden could benefit and grow even stronger with modifications to the market conditions to match the situation in other geographical contexts. The ability to reduce legislative complexity to simplify marketing and other issues (Fastighi et al., 2015), tax breaks (Cappellano & Spisto, 2019; Elzinga et al., 2015; Malone & Lusk, 2016), local government relief, or grant opportunities (Cabras & Higgins, 2016; Williams, 2017), are all measures that have contributed to the progress of the sector in other local, regional, and national contexts. The study thus confirms previous policy findings on the sector, at the same time as they contribute to previous findings by addressing them from producers perspectives that includes both qualitative and quantitative data.

Apart from the general findings and the connection to other geographical contexts, this study has also identified other suggestions from a number of brewers. These suggestions include allowing micro-brewers to sell their products directly at the brewery, something which has been discussed several times in the policy debate over the last years. Besides the benefits offered to the brewers themselves, such legislation could also offer benefit for other aspects of society, for example, other businesses in the tourism industry, reduced unemployment, and rural identity. In Norway and Finland, who up until recently had alcohol monopolies similar to Sweden, this type of direct sale was recently made legal. The political resistance in Sweden is to a large however. By allowing brewers to sell their products direct at the brewery, the idea behind Systembolaget and their non-profit strategy is threatened. Private direct sales, it is argued, will undoubtedly lead to conflicts: should the sector continue to follow a rigorous alcohol legislation or should the small-scale brewers be enabled to expand and increase their profits? Another potential change that was suggested by a large number of the surveyed brewers is to differentiate the taxes levied on alcohol, i.e., having lower taxes for small-scale brewers than for the giants on the market. This is done in a number of other geographical areas and countries (Cappellano & Spisto, 2019). Arguments against such changes and initiatives include the concern that it could possibly harm the protective alcohol policy that has long dominated Sweden. From a public health perspective, the Swedish alcohol monopoly has been a success, and by loosening up rules and regulations, Systembolaget's official goal, to "to minimise alcohol-related problems by selling alcohol in a responsible way, without a profit", could be threatened.

While the quantitative data for this study covered breweries from the entire country of Sweden, the qualitative data was gathered in a rural northern Swedish context. Even though the study still makes a relevant contribution to the nascent research frontier on the Swedish craft beer, it means that the conclusions could have pointed towards another direction if the qualitative studies would have been made in more urban, southern regions. It also leads to suggestions on further studies on this topic. These include comparing how demographic and regional characteristics impact the operations and activities of the craft breweries, and how these contextual dimensions influence the competitiveness of breweries.

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