

Impact of food retail market power on small food producers in Sweden: Challenges and opportunities

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ABSTRACT

The increasing market concentration in the food retail industry poses challenges to sustainable development by amplifying power imbalances within the supply chain. This study examines the dynamics between small food producers and large retailers, investigating the constraints that market concentration may impose on equitable collaboration. Adopting a qualitative approach, the research analyzes three case companies in Sweden to explore the role of shared understanding and trust for fostering sustainable sourcing practices. Findings underscore the importance of flexible partnership models and political market regulation to address systemic barriers. Key conditions for success include collaborative frameworks prioritizing mutual benefits, improved marketing of local and value-added products, and government intervention to sustain domestic production amidst rising private-label competition. By highlighting strategies to balance power dynamics, this research offers actionable insights for fostering a more resilient food system. These findings offer globally relevant strategies for promoting fairness and sustainability in food supply chains.

1. Understanding power, resilience, and collaboration in contemporary food systems

1.1. Food system resilience and the role of small producers

The current political situation, marked by rising geopolitical tensions and trade uncertainties, has sparked discussions on food security, raising concerns about the resilience of food systems in the face of external shocks (Rimhanen et al., 2023). Interestingly, the weaknesses of international food supply systems are rooted in what were once considered strengths, such as scale of economy and the bilateral trade agreements that have replaced the need for stockpiling critical agricultural inputs like diesel and fertilizers. However, in an unstable political situation they can become elements of 'trade wars' where the tension between transnational agri-food corporations and domestic political food security objectives are in conflict (Eriksson et al., 2020). Food system resilience is here defined in line with Wood et al. (2023, 22) as "the capacity to respond, adapt and transform in the face of a disturbance while still retaining the same core identity". Recent food system debates in the

wake of the Covid-19 pandemic and the war in Ukraine on strategies to foster resilience has been unnecessary polarized, often framing resilience strategies as a choice between strengthening global supply chains or re-localizing food systems (Reardon and Vos, 2021; Wood et al., 2023). Instead, there is a need for diverse solutions across scales and sustainability dimensions. The continued existence of small-scale producers can be argued to be a particularly important priority given current trends of market consolidation, from farm to retail level (The Swedish Board of Agriculture, 2021; Clapp et al., 2025), and the importance of managed connectivity and diversity for fostering general (food system) resilience (Biggs et al., 2015). The consequences of insufficient producer diversity and abundance are evident in value-chain disruptions, such as the case of the national egg shortage in 2023 caused by a salmonella outbreak among the largest producer in Sweden (Cedergren, 2023; Kappes et al., 2023). Ensuring domestic, and local, production in food hubs (Berti and Mulligan, 2016) may therefore very well be a strategy to ensure availability for food products (Larsson, 2021). These objectives are supported by strategies for ensuring work opportunities through social sustainability. Political objectives of

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maintaining a sustainable food system require long time perspectives and understandings of the needs for different kinds of collaboration (Berti and Mulligan, 2016; Rimhanen et al., 2023), in line with what is outlined in SDG 17. Sustainability challenges in food systems are universal, integrative and call for transformations. A lack of cooperation and integration within the food value chain can lead to defensive postures and hinder innovation, ultimately weakening the entire system (Lundin et al., 2018).

1.2. Retail power and small producer challenges

One critical actor in this system is the food retail sector, which plays a central role in shaping both supply and demand. As providers of necessities, food retailers control product portfolios that directly influence consumer choices. While offering a wide variety of products, they also constrain consumer decisions on what is available on their shelves. This dual role positions food retailers as both sales channels for producers and gatekeepers of consumption patterns—granting them significant influence in driving sustainable transitions (Mont et al., 2015).

The concentration of power in the food retail industry has increased over time. Between 2004 and 2012, market concentration increased in 22 of the 26 EU member states (Eriksson et al., 2016, 9). Similar trends have been observed in Canada (Karst, 2023), the US (Fitzpatrick and Davis, 2023) Middle East and parts of Asia (Nielsen Report, 2022). Such consolidation can amplify food retailers' influence but also risks marginalizing small-scale producers, particularly in systems already strained by external shocks, jeopardizing economic sustainability in food industry.

Recent research has identified several key challenges in the relationship between food producers and food retailers, particularly in the context of sustainable development and food system resilience (Table 1). Major issues include the lack of a centralized strategy for local food retailing, which limits the ability to meet rising consumer demand for local products (Zwart and Wertheim-Heck, 2021) and limited support for innovations in local food systems (Braun et al., 2023). Moreover, retailers can face legitimacy challenges when integrating local food into their offerings. Building trust with consumers and aligning sustainability messaging are increasingly important for maintaining market relevance (Odou et al., 2023). Meanwhile, efforts to build resilient short supply chains are often hindered by regulatory barriers, infrastructure gaps, market volatility (Herin, 2023), and persistent information asymmetries (Jia et al., 2024). These challenges highlight the need for more transparent, cooperative approaches. For example, improving efficiency through blockchain technologies demands long-term, trust-based relationships between producers and retailers (Ekinci et al., 2024).

Table 1
Key challenges in the relationship between food producers and food retailers in the context of sustainable development and resilience.

Problem in focus	Key challenges in food sector	Author, year
A lack of a centralized strategy for local food retailing	Strategies for re-localization to increase local food to meet consumer demand	Zwart and Wertheim-Heck (2021); Sciortino et al. (2025) Braun et al., 2023
Lack of support for innovation in local food systems through facilitation	Importance of shared understanding, reducing separation between inter-organizational relations	
Local food's impact on perceived legitimacy of retailer	Strategies for retailers in promoting sustainability	Odou et al. (2023)
Challenges for small producers in short supply chains	Information asymmetry, lack of infrastructure, regulatory barriers and market dynamic as hindering factors	Jia et al. (2024)
Efficiency in the retail industry	Block chain technology requires close long-term relationships	Ekinci et al. (2024)

1.3. Private labels and market imbalances

Markets dominated by a few powerful actors often suffer from weak competition (Daunfeldt et al., 2017), which can create opportunities for abuse of market power (Bern et al., 2018).

Critical voices of high market concentration in food retail point to the use of private label products (products manufactured by one company and sold under retailer's own brand) as symptoms of power imbalance (*Ibid.*). These products can marginalize smaller producers and reinforce retail dominance over both supply and demand. In the US, the market share for private label products was about 22 % in 2019, with a continuing upward trend (Gielens et al., 2021, 1). A similar situation was reported across seventeen European countries, where private label products made up an average of 44,8 % of the market in 2019, also showing signs of growth (Sansone et al., 2021, 1).

For food producers, supplying or manufacturing private label products can increase the production volume, but it rarely contributes to positive brand development or increased profit margins (Gielens et al., 2021). Through this, the food producer's economic sustainability becomes weakened. Profitability in such arrangements largely depends on the terms of the contract negotiated between the producer and the food retail representative, including delivery conditions and sales agreements. From the food retailer perspective, private label products offer advantages, for instance the economies of scale and significantly enhance their bargaining power in the supply chain (Bern et al., 2018; Inderst and Wey, 2007). This strengthened negotiating position for retailers often comes at the expense of the producers, further weakening their influence and autonomy within the market. Critical voices from small producers claims that the cost of selling products in food retail tend to transcend the profit (Thörn, 2025), reflecting a food system with clear imbalances.

This imbalance becomes particularly challenging for producers of local food, a category often associated with higher perceived quality among consumers (Augère-Granier, 2016:1, Dunne et al., 2011:9). However, the divergence in understandings of what 'local' refers to among producers and consumers can lead to confusion and potentially hinder sales (Abatekassa and Peterson, 2011:72; Dunne et al., 2011:5). Moreover, lack of transparency and limited communication throughout the food system regarding sourcing practices compounds these challenges, reducing trust and making it difficult for local producers to differentiate themselves in a market dominated by powerful retailers (Jia et al., 2024).

1.4. The Swedish food retail landscape

The structural disadvantages are particularly evident in the Swedish food retail system, where market power is concentrated among three dominant actors, ICA (with 50,8 % market share), Coop (19,4 % market share) and Axfood (16,4 % market share) forming an oligopoly (Swedish Food Federation, 2023, 277). In such a concentrated market, suppliers have limited power in negotiation processes. Profitability in the food industry has been severely impacted by significant cost increases at the supplier level, leading to negative profit margins for food producers between 2021 and 2023 (Statistics Sweden, 2024). This situation has prompted calls for political action. In terms of use of private labels, the current use in Sweden is moderate (about 25 %) which is lower than many other European countries (Switzerland 34 %, Spain and the UK 41 %) (*Ibid.*, 278). As private labels grow and large retailers gain even more control over product portfolios, the opportunities for producers to communicate the value offer of their products is thus limited. Gaining a place on retailers' sourcing lists, securing favorable shelf positioning, and achieving price points that support sustainable production has become increasingly difficult for small and medium-sized producers operating within these market conditions. Addressing these challenges requires fostering stronger collaboration between food producers and retailers, particularly if Sweden aims to support more sustainable

consumption and production.

In Sweden, the high market concentration in the food retail industry poses significant challenges for small food producers (Bern et al., 2018). Promoting sustainable consumption and production requires fostering collaboration between food producers and retailers. Such partnerships can enhance the accessibility of food from small producers, sometimes locally produced, for consumers while supporting the growth and development of small food producers' businesses. When studying the value chain of the Swedish food retail industry, it is therefore crucial to understand the dynamics between small food producers and retailers.

1.5. Aim and research questions

The aim of this project was to identify conditions for collaboration between food retail and small food producers. This study takes a food system perspective, recognizing the importance of a transition toward more sustainable practices from the viewpoint of small producers. The definition of small producers is < 10 employees (see Appendix 1). At the core of this investigation is the identification of the key factors that enable successful collaboration. To guide the research, the following two questions are central.

- I. How do small food producers want to collaborate with food retailers?
- II. Which factors are contributing to new ways of establishing collaboration?

This research is motivated by the need to identify pathways toward a more inclusive and sustainable food system, where small (and sometimes more local) producers can play a stronger role in shaping consumer offerings. By examining the structural, relational, and strategic barriers that influence cooperation between producers and retailers, the study seeks to reveal how such relationships can contribute to food systems characterized by shorter supply chains and more transparent production processes. Furthermore, insights from this investigation can inform policy initiatives and business strategies aimed at increasing the competitiveness of small and local producers, enhancing market diversity, and supporting the transition to a more circular and resource-efficient food economy.

2. Method

Based on the research aim and question, a qualitative approach was chosen due to its usefulness in understanding complex relationships between stakeholders, in this case (Yin, 2018) producers and retailers. A flexible design has been used to enable adaptation between the research objectives, the theory and the empirical material as suggested by Robson and McCartan (2016).

2.1. Case selection

In selecting case companies for this study, the Swedish definition of small food producers was applied (further explained in Appendix1). To explore the conditions for collaboration between small food producers and retailers, a context-specific approach was adopted. The study focused on a geographically localized setting — Gotland, an island situated east of mainland Sweden. The natural geographical delimitations are motivated by providing a similar context for the case studies and the fact that Gotland has a high market concentration of small food producers (DLF, 2022; Swedish Food Federation, 2023). The selection of case companies were based on the criteria of having less than ten employees, acting as primary producer or food manufacturer, produce own brand products and/or private label products and having food retail as main customer. This ensures that the chosen companies represent the challenges faced by small-scale producers. By examining producers' experiences and strategies, valuable lessons can be learned for improving collaboration and promoting sustainability in the food chain.

Three case companies were selected out of the ten that were contacted and willing to contribute to the project; two primary producers and one secondary producer. All three produce products with a sustainability profile and are further in this text named after what they manufacture as *the farm*, *the ice-cream factory* and *the dairy farm*. Data from these case companies were collected in terms of secondary data (web pages and corporate documentation) as well as primary data through interviews. Semi structured interviews were carried out following methodological procedures recommended by Yin (2018) as well as ethical guidelines by the university (covering GDPR).

2.2. Data collection

The interview themes (Table 2) strongly correlate with the conceptual framework (conditions for collaboration and shared value, presented in the subsequent section). The interview guide is available in Appendix 2.

A thematic coding process (Robson and McCartan, 2016) was carried out, based on the interview transcripts using the conceptual framework presented in section 3.2. The coding procedures are further explained in Appendix 3.

3. A conceptual framework for creating shared value

3.1. Strategic positioning

Strategic management provides a solid foundation and a well-established vocabulary for discussing business strategy (Porter, 1996). However, the classical interpretations of strategy were concerned with the financial bottom line, where strategy was an analytical process with action plans for long-term goals with the aim to receive competitive advantage (Mintzberg and Waters, 1985). The competitive advantage meant a strong market position in terms of negotiation power and financial resources. Much of the contemporary institutional settings reflected in contemporary legislation has its foundations in strategic management. However, the dated understandings offered by Porter in 1996, where a market is explained in terms of five competitive forces has been complemented with more sustainability-oriented understandings (Porter and Kramer, 2006) where needs to collaborate is given an important role in business models (Bocken et al., 2014).

In this project, the product portfolio offered by the food retailer is viewed as the strategic arena. From the food producer's perspective, this influences strategic decisions—particularly whether to engage in manufacturing private label products for grocery retailers or not (Galizzi et al., 1997). A contemporary understanding of the strategic options for creating a position, on the other hand is based on relationship marketing and shared value creation (Porter and Kramer, 2006).

3.2. Governance and partnership

Porter and Kramer (2006) emphasize an integration of social

Table 2
Relation between interview themes, research questions and conceptual framework.

Theme	Contribution to the research questions	Connection to conceptual framework
Shared value	Food producer's perceived value offer that can gain or restrain food retail companies value offer	Sustainable strategic positioning The Partnership Activity Ladder
Partnership	Enabling conditions for collaboration between food producer idea of best way for food retail and small food producers to collaborate.	The Partnership Activity Ladder

perspective into a company's strategy framework, mainly due to the lack of focus on 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 codes of shared value. There is a risk that companies miss important opportunities as growth, innovation and social impact at scale if they do not track the interdependency between social and business results (Porter and Kramer, 2006, 2). According to Glasbergen (2011), market mechanisms can be utilized to promote sustainable practices through collaborative partnerships. Through this, Glasbergen (2011) expands on the notion of co-creation of value, looking at governance that builds on the idea that the state, market and civil society's interdependences occur in a multi-actor context where each actor individually takes responsibility for public issues.

Looking at co-creation of value as a process, the Ladder of Partnership Activity (Fig. 1) provides a useful conceptual model that visualizes a gradual shift from internal to external focus. 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.

Glasbergen (2011) argues that the Ladder of Partnership Activity can be used as a model for designing governance structures in accordance with principles of partnerships. For the model to be well applicable, involved partners should address the following three criteria: delivering significant environmental benefits, generating significant business value, and creating a model that other companies can adopt.

4. Results

To establish conditions for collaboration for shared value from a food producer perspective, the first step was to compile which areas that are of most importance. Pricing, organic certifications (KRAV) and Swedish production (resilience) were identified as common themes among the interviewees. The key themes are further used as the foundation for the case-specific empirical data analysis presented in this section.

4.1. Creating value in primary food production

The value offer that is delivered to the producer's customers related to food and environmental sustainability is presented in Table 3. This table also presents lacking shared values between food retail and food producers. Table 4 offers an overview of grounds for shared values from the food producer's perspective.

Value dimensions and value offer for each of these cases are unique.

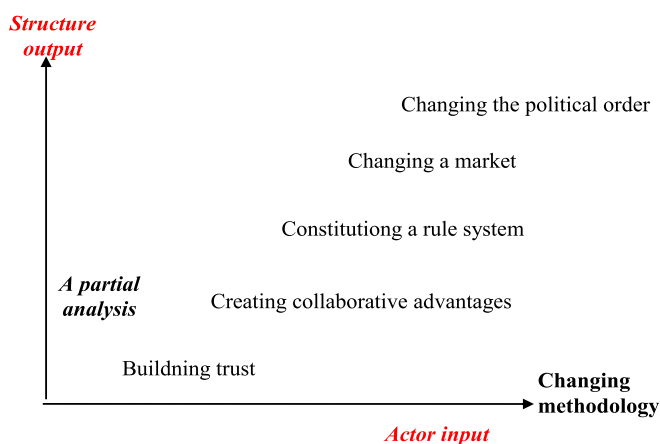


Fig. 1. The ladder of partnership activity (Glasbergen, 2011:4 with minor modifications).

Table 3

The value offer and experience of lack of shared value by each case company.

Company	Value offer	Experience of lack of shared value with food retail
A The Farm	Produce products certified as organic	Perceives food retail to not share their value offer due to a reluctance in marketing of their products' added value
B The Ice-cream factory	Products made of only organic ingredients	Experience unwillingness from food retail to market producers' value offer. Unfair price pressure arise since products are not differentiated from lower quality products in food retail shelves
C The Dairy farm	Benefits biodiversity and continuing of Swedish food production	Do not find any shared value as long as food retails private label products price pressure delimit the growing potential for their own branded products

Table 4

Summary of lack of shared value and how to expand partnership by each case.

Theme	The farm (A)	The ice-cream factory (B)	The dairy farm (C)
Shared Value	Does not perceive food retail to share the same appreciation for their added value products. They notice food retail sell their value added products at the same price as conventional products claiming additional compensation from customers for the added value is not possible to receive.	Product is a complement in a category persisting of mostly conventional products – but do not perceive that food retail acknowledges this in communication or product placement.	Questions about creating shared value when the food retail has a strong market position based on unfair competition and price pressure with their private label products.
Partnership	Points to how it is necessary for food retail and food producers to increase understanding for each other's businesses and through this, find a consensus that leads to better co-operation. Do argue that it is necessary to involve policymakers and regulation to succeed.	Would like to decrease food retail power for product exposure in store for a more equal power distribution between food retail and food producer.	Call for increased political engagement in order to develop regulations surrounding the development and marketing of private label products.

The experience of lack of shared value with food retail varies among the case companies as well. None of the case companies mentioned perceiving shared value with food retail.

4.2. Expand partnership between primary food producer and food retail

All interviewees expressed a desire for food retail to develop a more comprehensive understanding of the role small food producers play in the food system. Finding a common purpose was deemed as central for a partnership to enable improved collaboration. The interviewee from the Farm (A) highlighted a need for both parties to enhance communication and identify mutual benefits through collaboration.

“understanding, finding the common benefits (.) more direct

communication, maybe we can skip the warehouses and intermediaries?" (the Farm).

Previous efforts to foster collaboration between small food producers and food retailers were examined, highlighting variations in their outcomes. One appreciated approach, due to the closer contact with food retail, was producing groups, i.e. merger of producers who engage in joint negotiation and cooperation as a group instead of individuals.

"I know that this (a closer relationship with food retail) was possible a couple of years ago through producer groups, where 25 producers delivered products together to Coop and Hemköp. This has disappeared" (the Farm).

Another example highlighted as successful was when a food retail store, Stora Coop Visby, decided to only sell Swedish meat to support the farmers during the difficulties of the drought in 2018.

"... this is an event 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 interviewees underscored the significant influence of politics and legislation, emphasizing that effective solutions could emerge if the development of such collaborations were prioritized as part of a political agenda. Each of the interviewees questioned how the sales and development of food retailers' private label products are not regulated, and they also expressed concern over increased imports aimed at lowering prices, which they feared comes at the expense of domestic food production. In response, they called for greater political involvement in support of more resilient Swedish food production.

"It should be of an absolute interest for politics to have a strong and solid food production in Sweden (the Dairy Farm).

4.3. Summary results

From a food producer perspective, added-value products are not always recognized as such by food retailers. This misalignment is unfortunate, as the basis for the collaborative value lies in the concept of shared value. The interviewees promote development of partnership both internally through increased communication and understanding for the other partner, but also externally by a desire for stricter regulation developed by policymakers applying to all actors within the partnership.

The discussion of both internal and external actions to expand and strengthen partnerships emphasizes the multifaceted nature of the contemporary challenges for sustainable development within the Swedish food retail system.

5. Discussion

Small food businesses can play a vital role in promoting sustainability within the food system, from a societal and sometimes also ecological and environmental perspective. The link between farm/producer size and environmental performance is however not straightforward. Work by Ebel (2020) argues that the commonly held assumption of the environmental superiority of small-scale primary producers may stem from the fact that farmers who apply agroecological principles are more likely to operate at a smaller scale. In this view, environmental impacts are determined primarily by management practices rather than by farm or producer size alone. Other work has, however, emphasized the benefits of short transport distances (Sciortino et al., 2025) and improved food literacy (Boucher et al., 2017) in localized food systems, often implying small-scale production practices. On the other side, food miles tend to account for a minor portion of the environmental footprint of a food product (Weber and Matthews, 2008), suggesting that the distance between production and consumption should not be overemphasized.

While the environmental benefits of small-scale food production remain uncertain and context-dependent, its contributions to social sustainability and food system resilience are more clearly established.

Small food businesses often support local economies by creating job opportunities, especially in rural and underserved communities, thereby strengthening social structures and improving social sustainability (Reardon and Vos, 2021). These businesses can also foster closer connections between producers and consumers, which can help increase public awareness and knowledge about food production, sourcing, and seasonality. Moreover, by offering diverse and often locally adapted food products, small food businesses can contribute to resilience in the food system, especially when they maintain balanced connections to other actors and resources, avoiding overreliance on inputs like feed and fertilizer (Wood et al., 2023). Small producers can help reduce dependency on large-scale, centralized supply chains, making local communities more adaptable to environmental and economic disruptions. Conditions for food system resilience and food retail legitimacy are discussed in terms of conditions for collaboration and needs for new food system business models.

5.1. Conditions for collaboration

This study examines the landscape of potential partnerships and perceived shared value opportunities between small food producers and retailers in Sweden. Food producers report resistance from retailers in recognizing the added value of their products. Producers cite issues like price pressure from private-label products, poor product placement, and the belief among retailers that consumers are unwilling to pay for value-added products. These factors create barriers to establishing shared value. The highly concentrated structure of the Swedish food retail market, as noted by Borgström and Josefsson (2015) and Lundin et al. (2018), reinforces conditions favorable to large retailers, enabling them to exert greater control over pricing and product selection.

For small producers, the retailers' treatment of the added value in their products could determine their business survival. Recent industry data (Statistics Sweden, 2024) indicate profitability challenges, partly due to rising supplier costs. Without fair compensation from retailers for the added value, producers risk going out of business. Two of the producers (A and C) describe similar experiences in having a product which widens the product category through its added value of having products with sustainable attribute in food retail – but do not perceive that food retail takes advantage of this added value that the product brings to both the store and the consumer. Odou et al. (2023) suggests that food retail has the ideal position in the supply chain to offer more sustainable products to consumers. A successful collaboration is when both parties get something positive out of the relationship. Retailers that offer added value products are considered more genuine from a consumer perspective (Odou et al., 2023), meaning that doing so could benefit both food producers and food retail.

A key finding is a disconnect between producers and retailers of their awareness and understanding about value added dimensions of a product. It may refer to the production method or what is locally produced. Producer B noted that their KRAV-certified products, which is an organic certification in Sweden, are sometimes sold as conventional items, as retailers argue that consumers are unwilling to pay the price premium. Additionally, confusion persists over who is responsible for marketing the added value—whether it be the producer, the retailer, or the KRAV organization itself. This confusion aligns with previous findings on the impact of varying perceptions of "local food" (Dunne et al., 2011). The confusion of responsibility for marketing the added value can create information asymmetry for the consumer and damage consumer trust (Jia et al., 2024). Initiatives to reduce this asymmetry may foster growth and resilience in the food system while it also can enhance transparency in pricing and market dynamics (Jia et al., 2024), which is demanded by several of the food producers. Addressing this divergence is also crucial for promoting sustainable consumption and production (Abatekassa and Peterson, 2011).

Several producers expressed concern over the long-term effects of private-label products on Swedish food production, especially regarding

their ability to sustain local production using Swedish raw materials. This concern has been articulated several times in earlier research of private label products' effect on the resilience of Swedish food producers (Swedish Food Federation, 2023; Lundin et al., 2018; Bern et al., 2018).

5.2. Exploring new collaborative models

Developing new collaborative approaches in the food supply chain should focus not on creating a one-size-fits-all solution, but on establishing a flexible model that can be adapted to diverse contexts. Glasbergen (2011) suggests that partnerships are inherently flexible, offering potential as adaptable models for others to emulate. The suggestions from the case companies in this study align well with the steps in the Ladder of Partnership Activity, providing a structured pathway for developing collaborative partnerships.

Identified factors in this project that influence conditions for collaboration are illustrated in Fig. 2. The figure is created by combining Glasbergen's (2011) Partnership Activity Ladder with the key conditions identified by the case companies.

Factors presented in Fig. 2 relate to Glasbergen's (2011) understandings of conditions for collaboration where trust-building is the initial step toward partnership. However, the power imbalance in Sweden's concentrated food retail market (Daunfeldt et al., 2017) can create conditions that enable power misuse (Bern et al., 2018) and hamper trust-building processes. Achieving a balanced, horizontal relationship is essential to fostering trust in a partnership, where traditional hierarchies are replaced with equality (Glasbergen, 2011). The interviewees stressed a need for more direct communication to strengthen the foundation of trust between the partners. There is a desire to regain some control and influence from food retail over how products are displayed in store shelves. If food producers perceive a more equal power distribution in the partnership the initial step of trust building can be established.

Creating collaborative advantages, meaning creating mutual benefits from collaboration, requires careful consideration of cost-effectiveness for both partners across all interactions. A partnership where both parties benefit ensures long-term stability, while one-sided advantages undermine mutual prosperity (Glasbergen, 2011). The second step of the ladder warrants further attention, particularly given the high market concentration in Swedish food retail. As Lundin et al. (2018) argue, this concentration tends to favor the interests of food retailers over those of producers, leading to a one-sided advantage that can hinder producers' business development and innovation. To shift the current one-sided dynamic towards a more mutually beneficial partnership, it is important make sure that both partners do receive an equitable share of the benefits (Glasbergen, 2011). In order to do so, merging the second and third steps of the ladder could be effective. Establishing a system of rules

(the third step) based on mutual understanding can prevent conflicts that arise from differing perspectives. Interviewees emphasized the importance of a shared understanding of the added value of their food products as the foundation for successful partnerships. To adapt Glasbergen's (2011) Ladder of Partnership Activity to Swedish food retail and food producer relationship challenges, using a combination of step 2 and step 3 in partnership development could be a useful approach in partnership development.

Although transforming a market may seem daunting, leveraging insights from past initiatives can make progress achievable. As food retailers play a critical role in promoting sustainable consumption and production (Odou et al., 2024; Mont et al., 2015), collaboration within the Ladder of Partnership Activity offers a pathway for positive change within the food chain, with potential spillover effects into other industries. One example mentioned by the interviewees as a past initiative to reconsider are producing groups, a local initiative used to strengthen the bargaining power and position. This aspires for a merger of step 4 and 5 as-well, since Braun et al. (2023) describe how local initiatives and politicians is crucial to set course for a re-localization of the food systems in municipalities or micro-regions. This is particularly relevant given that several producers expressed a desire for increased governmental support to ensure the resilience of Swedish food production. Concerns about private-label products, exacerbated by limited regulation, were consistently raised, particularly in terms of power imbalances (Bern et al., 2018). Revisiting the first step of the partnership ladder, addressing the power imbalance, suggests that increased political engagement could be instrumental in balancing power dynamics and fostering trust. However, private partnership should not be an object applicable to be governed completely by political guidelines. While interviewees call for support from policymakers to rebalance the power-structure between actors in the food system and regulations of private label products, it is essential to strike a balance. Politics should play a role in shaping the market and industry for the better, but without allowing government control of private partnerships.

Private-label products tend to benefit retailers more than producers, yielding economies of scale and strengthening retailers' bargaining positions (Bern et al., 2018; Inderst and Wey, 2007). Although the requests for private-label regulation from interviewees may not reflect a producer consensus, they highlight an area warranting attention in countries beyond Sweden. With private-label market shares rising in the U.S. and across 17 European nations (Gielens et al., 2021; Sansone et al., 2021), examining Sweden's approach to food chain dynamics could benefit stakeholders in other regions as well.

6. Conclusions

The findings emphasize that small food producers face distinct

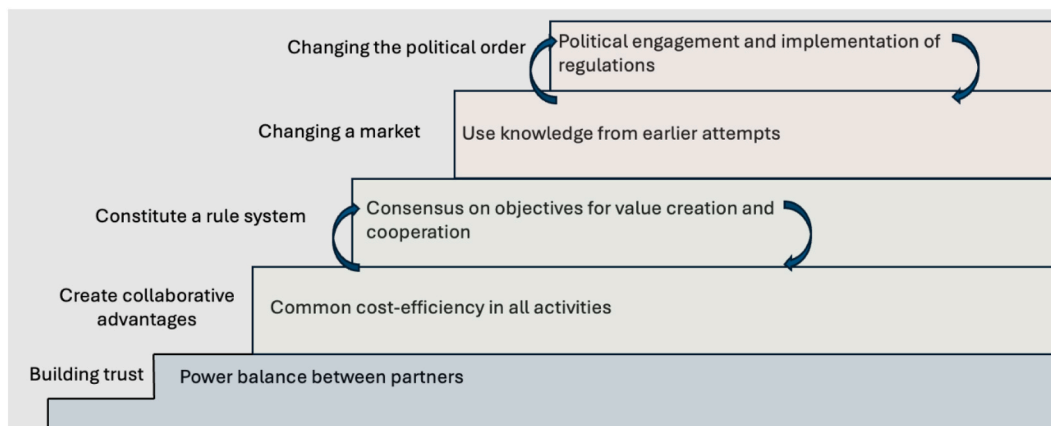


Fig. 2. Factors contributing to develop collaboration between small food producers and food retail according to case companies.

challenges when negotiating with large retailers, where size directly impacts bargaining power (Swedish Food Federation, 2023). Small producers are often limited in resources but have advantages like shorter supply chains and local production methods, allowing them to market products as “local” or “sustainably produced” (Kneafsey et al., 2013). Yet, with the oligopolistic nature of Sweden’s food retail sector profitability for small producers is increasingly strained (Statistics Sweden, 2024).

This study underscores the complex dynamics between food producers and retailers in Sweden, highlighting significant barriers to collaboration that hinder the realization of shared value. The findings reveal a critical disconnect between producers’ efforts to market their value-added products and retailers’ perceptions of consumer willingness to pay for them. The concentrated nature of the retail market exacerbates these issues, enabling larger retailers to impose price pressures and limiting opportunities for small producers. As demonstrated, the lack of clarity regarding responsibility for marketing added value can lead to consumer confusion and erode trust, thus stalling potential collaborations.

To overcome these challenges, developing adaptable, flexible partnership models that prioritize mutual benefits is essential. Building trust and addressing power imbalances in the retail sector are foundational steps that can facilitate more equitable relationships between producers and retailers. Furthermore, political engagement is vital for supporting these collaborations and ensuring that domestic production is sustained amidst rising private-label competition.

Implications of this project relate to organizational aspects of resilience of the food system.

Ultimately, fostering a more resilient food system in Sweden requires a concerted effort from all stakeholders, including local initiatives, government support, and the willingness of retailers to source products from a range of producers, including small business. The insights gleaned from this study not only serve as a guide for Swedish stakeholders but may also provide valuable lessons for similar contexts globally, advocating for a more equitable and sustainable food supply chain. This article contributes with insights into how collaboration could create shared benefits for both retailers and small producers and presents several factors possible to consider while hands on working to improve the relationship between small food producers and food retail.

Future research should explore the effectiveness of various collaborative models between food producers and retailers, focusing on case studies that demonstrate successful partnerships. Investigating consumer perceptions of local and value-added products can provide

insights into marketing strategies that bridge the gap between producer offerings and consumer demand. Additionally, examining the role of government policies in facilitating equitable relationships within the food supply chain is essential. Lastly, further studies could assess the long-term impacts of private-label products on small producers and local economies, contributing to a nuanced understanding of market dynamics.

CRediT authorship contribution statement

Emelie Lundberg: Writing – original draft, Project administration, Methodology, Formal analysis, Data curation. **Malin Jonell:** Writing – review & editing, Writing – original draft, Project administration. **Cecilia Mark-Herbert:** Writing – review & editing, Writing – original draft, Visualization, Supervision, Resources, Methodology, Conceptualization.

Declaration of generative AI and AI-assisted technologies in the writing process

During the preparation of this work, the authors used ChatGPT to improve the clarity of some of the written content. After using this tool, the authors reviewed and edited the content as needed and take full responsibility for the content of the published article.

Declaration of competing interest

The authors declare the following financial interests/personal relationships which may be considered as potential competing interests: The lead author, Emilia Lundberg, is the founder of a small food company. This affiliation is disclosed in the interest of transparency. The company was not involved in the design, execution, or funding of the research presented in this manuscript, and no commercial interests have influenced the study’s findings or conclusions.

The remaining authors declare no competing interests.

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Appendix 1. An Overview of Definitions of Small Company

The definition of small company, in this case food producer, varies depending on where in the world the study is carried out. Table (A) offers an overview of regionally established definitions.

Table A
Definition of small food producer per region in number of employees (Government of Canada - Innovation, 2017; China Briefing, 2011; Turner and Ledwith, 2016; European Commission, 2019; Swedish Food Federation, 2023)

Region	No. of employees
Canada	5–99
China	10–49
USA	20–100
EU	10–49
Sweden	<10

In this project, the selected case studies are all small food producers in accordance with the Swedish definition.

Appendix 2. 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?

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?

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 smalle 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?

Appendix 3. Coding Procedures

Table B and C present the coding procedures in terms of steps in the process (Table B) and creation of categories in the analysis process (Table C).

Table B
Step of process in analyzing interviews in a thematic analysis

Step	Procedure in each step of the 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 C
How categories were 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?	Involve external partners
	2. Do you have a business strategy? What is it?	Changed demand, consumer behavior
	3. Have you changed your business strategy the last years? Why/Why not?	Price pressure in chain
	4. Have these changes been because of circumstances outside the company?	
Power and dependency	1. Do you have customers and suppliers that are extra important to you? If yes, why? If no, why not?	Dependent on food retail for continuing business as usual = 4
	2. What is power and dependency to you?	No other buyer situation increases dependency on food retail
	3. How do you think that power and dependency is illustrated between companies in general in food industry?	Different customers do care about their supplier to different degrees
	4. Do you think that your suppliers are dependent of you?	dependent on size of customer/nr of suppliers
	5. Do you think that your customers are dependent of you?	Product exposure in food retail store
	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?	
Relationship	1. How are your relationship with food retail?	Less appreciated than central agreement suppliers
	2. Do you actively work on improving your relationship?	A "Far away" – relationship
	3. Who initiates negotiations, you or food retail?	No initiative for improving relationship
	4. Do you feel equal with food retail in negotiations?	
Private Label	1. As a producer, what are your opinions about private label products in general?	Price pressure
	2. Do you experience your business development being affected by the increase of private label products? How?	Damages value for sustainable products (KRAV, Eco)
	3. What do you think the effects of private label increase are in the long-term?	Politics
	4. Who do you think are responsible for these long-term effects?	Both positive and negative, depends on origin of product and production
Trade-offs	1. What main value do you deliver to your customers?	Responsible food retail: 4
	2. Shared value – does your value offer benefit your customers/food retailers value offer?	
Partnership	1. What do you think is the best way for food retail and small food producers to collaborate?	Sustainability (production, product)
	2. Which factors needs to change/be made in order for this to be possible?	Premium segment
	3. How can grocery stores and smaller food producers ... build better trust?	Needs improvement
	... create cooperative advantages i.e. create advantages through cooperation that benefit both parts equal?	Consensus that leads to co-operation
	... what could a new system look like for the cooperation between the grocery store and the food producer?	Communication, long-term, cost-effective
	. how could this system change the market? Both for the producer and for the grocery store	Regulations, politics
	... do political rules and laws need to change for this to be possible?	Decrease power food retail
		Take use of old attempts

Data availability

Data will be made available on request.

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