

# Sweden – an emerging wine country – valorising marginal lands for new types of production

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## Abstract

*This article highlights the articulation of the new rurality in Sweden, exemplified by the emergence of the wine sector. Wine production became possible as a result of climate change and Sweden's EU membership, that led to the abolishment of the production and wholesale monopoly. The case study shows that there are still important constraints against the further development of the sector, in this case due to path dependency in agricultural and alcohol policy and current Swedish alcohol regulations. Some additional obstacles are the prohibition against gate sales and the inability of farms to meet the scale demands imposed by the public retail monopoly.*

## 1. Introduction

Sweden has been a wine importing country throughout its entire modern history, but commercial wine production is a relatively new phenomenon. From pre-industrial times until the beginning of the 20<sup>th</sup> Century wine consumption was reserved for the court, the nobility, the church and the wealthy population of the main cities. But over the course of the last century, wine consumption increased dramatically as the result of increasing prosperity and a century of cultural assimilation between Swedish and foreign consumers (Rytkönen 2011).

Today there are around 330 farms engaged in grape-growing,<sup>1</sup> a dozen of them are commercial vineyards with all the official permits to produce and sell wine. Only two decades ago, such a development would have been a utopia. But when Sweden became a full member of the EU in 1995 a compromise between Sweden and the EU, four of five public alcohol monopolies were abolished and only the retail monopoly was preserved. This change of policy paved the way for a potential development of a wine sector in Sweden. This was however, not the only requirement to achieve such a development. The cold climate, lack of experience and the habit to import and consume wines from other countries can be considered as important obstacles to the development of a Swedish wine sector. However, many obstacles have been overcome and an emerging wine sector in this "vodka-country" is now a reality. The purpose of this article is to provide an overview of how Sweden has become Europe's latest "wine country". An important question to be answered is: Which are the main features of and challenges to the Swedish wine sector?

The article is divided into three sections. It starts with a short theoretical contextualization, followed by an overview of the preconditions for the development of a domestic wine sector. Finally the development of the sector is presented with an analysis of its main challenges and constraints.

## 1.2 The new rurality

Current development in agricultural and food production is characterized by a far reaching structural rationalization that caused a decline in the number of farms and firms at a global scale alongside with a sharp increase in productivity and output. This process is driven by

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<sup>1</sup> Most grape-growers make their own wine but are not allowed to sell it. Some of them contract the vinification service from the commercial vineyards, while other process themselves. The production from non commercial vineyards is for self consumption.

contemporary agro-food globalization and highly influenced by the emergence of a globalized supermarket sector, the search for quarterly profits and global sourcing strategies of global agro-food companies, the increased use of financial instruments in food trade, the increasing need to use agricultural land for the production of biofuels and not the least by changing natural conditions, such as climate change (McMichael 2007) At the consumer end of globalization, due to recurring food scandals, such as the mad cow disease and last years dioxin problems in Europe, there is an increased consumer demand for safe, local, healthy and culturally conditioned food (Bonow et. al. 2011). In Sweden, a century of structural rationalization in the quest for standardized and cheap food for the growing urban population alongside with contemporary globalization almost eradicated small-scale food production. In recent years, however the number of small-scale food producers has increased.

The trend towards “going local” through increased small scale elaboration of food is the same all over Europe. There are many different parallel processes behind this new development. One is a new wave of migrants searching for better residential conditions that equipped with economic resources and managerial and marketing skills that embark in the development of new firms. A second, migration influenced process is the wave of migrants from the north of Europe (UK, Germany, Sweden, etc) to mainly Spain, Greece, Italy and Portugal that move in search for a better climate. These migrants are increasingly still in a working age and one way to find an income in their new country is starting restaurants, hotels, and small scale food production units (Labrianidis 2004). A third is the valorization of previously marginalized areas initiated by EU policies through the adoption of quality schemes that link products and their organoleptic characteristics to the territory, guaranteeing a superior quality for consumers, at the same time that they provide protection and support for small scale food producers in rural areas. The main characteristics of these quality schemes is that they are embedded in localized agri-food systems or short food chains in which production, know-how and consumption have strong connections to the local territory and its culinary traditions. Through the establishment of product differentiation by value adding quality standards, collective brands and quality schemes countries like France, Spain and Austria have managed to protect work opportunities and promote entrepreneurship in rural areas, using small scale food production as a vehicle for increased rural tourism that yield income for rural towns and counties that are far beyond the value of food sales (London Economics 2008, Canavari et. al 2007, Bonow et. al. 2011). A fourth is the wave of short value chains that emerged by consumers demand for food safety in combination with original taste and knowledge about the origin of food. Some expressions of this phenomenon are the vast number of farmers markets around Europe and the emergence of farm stores and rural stores that sell local food (see for example Anthopoulou et al 2011). Finally, a fifth is the articulation of Community Supported Agriculture (CSA) that in some senses is related to the former, because CSA responds to consumers desire to know where their food comes from. In CSA farming becomes integrated into the community, and values, goals and risks are shared by the community and farmers (Adam 2006). In reality there are many different models, but generally, consumers subscribe to the farm before the growing season starts by paying a fee and are allowed to get a share of the farm products during the growing season (Lamb 1994). In CSA, consumers and farmers make reciprocal commitments that benefit both (Cooly and Lass 1998).

The sum of the above mentioned development is in the academic discussion denominated as the *new rurality*. The concept stands for a process in which rural and agricultural agents reinvent themselves by supplying not only products to fulfil nutritional demands, but also recreation and leisure opportunities in beautiful landscapes, secure future environmental sustainability, provide post-industrial job opportunities, promote growth, counteract depopulation of rural spaces, promote gender equality and offer regions and nations a sense of history and tradition. It is “new”,

because the emphasis of rural development was previously placed on agricultural activities, technical advances and productivity chase, but this focus has shifted and includes now many all types of activities conducted in rural areas, rural development has thus become based on pluriactivity, it is multifunctional and sometimes even part time based (Losch 2004). The new rurality has emerged as a response to changing geopolitical food and agricultural relations. that increased the level of competition in the global agro-food sector (McMichael 2007) that forces agents to seek new ways, new institutional settings at global, regional or national level (Baldock et al 2001), as well as a new socio-economic landscape that not only grasps new patterns of demand (Rytönen 2011) but also helped new (many times urban) agents to capitalize and invest in new rural ventures (Labrianidis 2004). The emphasis of the previous discussion about the new rurality has been put on socioeconomic changes. Significant changes that previously were assumed to be constant endogenous factors of the current food regime<sup>2</sup>, such as climate, have been overlooked. But it is clear that climate change can alter current relations (along with other endogenous forces) and become significant drivers behind change.

In Sweden the articulation of the new rurality has fallen behind the rest of Europe. But during the last decades it has come to include possibilities never dreamed of before. As a result of a century of structural rationalization almost all small scale food production and traditional agriculture disappeared. But in the few spatial pockets of small scale agriculture and food production that remained, an incipient process of revalorisation and “intellectual expropriation” related to farming practices and artisan food production has taken place. The transformation pressure from the agro-food sector has in this sense been that of a threat rather than that of an opportunity. Therefore, regional authorities have played a key role in this process not just solving institutional and infrastructural obstacles, but also being the visible hand of the state, as carriers of the entrepreneurial function<sup>3</sup> (Rytönen 2011). One example is the development of farm dairies in the county of Jämtland, that went from being a marginalized activity being a precursor in the articulation of the new rurality (Rytönen et al 2011).

The lag between Sweden and other European countries has mainly been caused by the degree of institutionalization and path dependency of the productivist paradigm. A wide spread mentality and the existing institutional setting - here understood as the same as the rules in society, or the restrictions set up by humans that dictate forms of cooperation in society (North 1993) - and infrastructure that is only appropriate for large scale operations are the main obstacles against the new rurality. The emergence of the wine sector in Sweden constitutes an excellent case to illustrate the essence of the new rurality.

## **2. Preconditions for the emergence of the wine sector**

Some general preconditions for the emergence of a new trade are a suitable institutional setting, availability of capital, human resources with enough knowledge to start and develop the trade, as

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<sup>2</sup> A food regime is composed by an institutional/structural power base; it has a mode of regulation and economic agents with varying degree of economic space, as well as endogenous forces of change such as geography and nature. It results in the production of certain food, a pattern of distribution and environmental effects.

<sup>3</sup> Alfred Chandler coined the expression “the visible hand” when he studied how managers in modern business enterprises have taken over some of the functions previously attributed to the markets “invisible hand”, for example the coordination of flows of goods, the allocation of funds and personnel for future production and distribution. In agriculture, it is clear that the visible hand of the state has taken over some of the functions attributed to the market. It occupies the role of coordinator of flows of goods and allocates resources, in some cases it also clearly carries the entrepreneurial function, by innovating and making strategic decisions under genuine uncertainty.

well as an entrepreneurial stock that has had the ability to perceive a future potential development before there are any successful experiences to follow. There is also a need for a demand. One specific precondition in this case is the existence of a suitable *terroir*, defined as the vine and its physical environment (soil and climate) as well as their interactions. *Terroir* is extremely important because the quality of a wine, and consequently the value it can acquire, is largely dependent on the *terroir* in which it is produced (van Leuwen et. al. 2010).

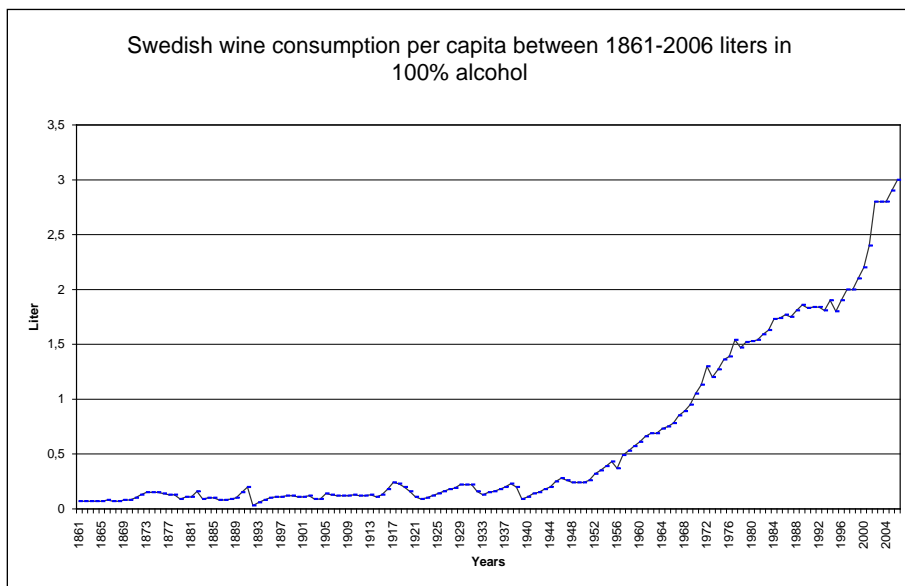
## 2.1 Terroir and climate change

Temperatures in Sweden have experienced a persistent increase since the middle of the 18<sup>th</sup> Century. These increases, especially since the 1950's are so significant that they lack parallel in history (Söderberg et al 2008). The growing season has expanded, winters are milder now by almost 2 degrees, while summers are barely warm. Annual precipitation has increased mainly during the summer, also during the winter and spring seasons while autumns have become marginally drier. These changes are all beneficial for vine-growing (Rummukainen 2007). Future forecasts predict an even warmer and wetter climate in Sweden, while traditional wine producing countries are expected to get dryer. The geological base for wine production is determined by previous glacial epochs in which the soils have been mixed and re-mineralized by ice sheets at regular intervals. The soil is relatively mineral-rich and therefore suitable for viticulture (Andrén et. al 2011).

With few exceptions vineyards are located in southern Sweden, in the counties of Skåne. Several wineries are located on the two big islands in the Baltic Sea, Öland and Gotland and the most northerly commercial vineyard is located in Södermanland, south central Sweden. All vineyards are located within the Swedish farming zone I, i.e. in the zone where conditions for farming are most favourable (Andrén et. al 2011).

## 2.2 Domestic demand

Diagram 1. Per capita consumption 1961-2006 (100% alcohol)



Sources: Statistiska Centralbyrån and the sales statistics of Systembolaget.

As can be seen above, consumption has increased dramatically over the last six decades. First and foremost this is due to the increased wealth experienced by the entire population especially during the post war period. In addition, the shift in alcohol policy from an individually based to a general alcohol control model in the 1950's, the Swedish EU membership in 1995 that led to the abolition of four of five public alcohol monopolies (production, wholesale, distribution, import/export). Only the retail monopoly remained. In order to keep the retail monopoly, the service was improved and self service stores were developed to create a "shopping experience". Moreover, the introduction of the Bag-in-Box led to an increase in the number of liters purchased per occasion. Sweden has also been influenced by changes in global consumption patterns, that favour value added and experience-oriented products. (Rytkönen 2011).

### **3. The wine sector**

Sweden is since 1999 officially classified as a wine country by the EU and has a quota of 250,000 liters of wine per annum. There is no exact knowledge about the number of vineyards, because only commercial vineyards are obliged to register their production to the Swedish Board of Agriculture (SBA). An inventory made by Skjöldebrand in 2010, estimated the number of vineyards to around 330 units, most of them produce wine on a hobby basis (Skjöldebrandt 2010:4).

The industry is still small, therefore the development of output is not monitored on a regular basis and hobby production is not monitored at all. In 2006, the total Swedish production summed up to 5617 liters (SBA 2010) and production estimates for 2011 show that production is now about 18,000 liters. Around 30 percent of all grapes used in commercial vinification are imported. The official estimates of the area under vine sum up to around 18 hectares (Wingård 2011). Figures are though just estimates. Only a dozen of the existing vineyards have permission for commercial vinification (Livsmedelsverket 2011). Production is still limited therefore investments in processing plants are therefore scarce. (Amnegård 2010).

The Swedish production is subject to EU market regulations that include production rules and types of wine, labeling, protection of names, subsidies and foreign trade. The EU regulates total production by prohibiting the planting of vines, keeping registers for harvest, production and stock inventories. (SBA 2011) Limitations concerning total output and the area under vine are already applied in other EU countries, but Sweden is exempted from limitations because the total area under vine is less than 100 hectares. (Mårtensson et al 2008).

The establishment of a vineyard requires both a great deal of knowledge and a significant amount of capital. The minimum cost for establishing a vineyard in Sweden and buy the necessary equipment for wine processing is approximately 5.340.000 crowns (583.036€ - exchange rate of 7th of October 2011) for a vineyard of five hectares. The investment is expected to begin generating revenues four years after planting, but it will take another few years before the winery can start producing at full capacity. Estimations of total potential yields in Sweden ascend to 400 to 600 liters per hectare, compared to between 8000 and 10,000 liters per hectare in other wine producing countries in Europe. The differences in yield were attributed to the climatic conditions (Mårtensson et al. 2008) At the vineyard in Klagshamn in Skåne for example, the first wines were produced five years after the winery started and the yield amounted to 2,000 bottles, that is a total of 1500 liters of wine (Dahl 2006)

Wine producers can be divided into three categories. Commercial growers, hobby growers and berry producers (on a hobby or commercial basis) that extended their activities to include grapes. The origins of the producers are quite varied. Some are retired or former owners of small business, some are firm owners or employed in completely different business (for example

doctors, computer experts, etc), and some are farmers (Svensson 2011 and Gustafsson 2011). The largest 33 vineyards are listed on the external homepage of the grape growers association, but not all of them are commercial vineyards (Svensson 2011).

Activities in the vineyards and wineries are often combined with other farm activities, tourism, conference facilities, farm stores, health activities, etc. This is one of the world wide characteristics of the "new rurality", where multi-activities and part-time farming are an important development (Losch 2004). This reflects the new role that rural spaces and small scale farming and elaboration of food occupies in the wake of a post-industrial economy. A common denominator for all the vineyards, with the possible exception of the newly planted Horns vineyard on Öland, is that they all combine activities with the tourism and hospitality industry. A rather ingenious, yet representative example is winehouse in Åhus. They sell subscriptions to rows of vines in the vineyard. The subscribing customers work on "their row" as an alternative kind of recreation (Åhus Vineyard, 2011).

According to EU-regulations, Sweden is a wine country without regions, therefore Swedish wine produced can only be labeled as table wine. But there are currently two emerging wine regions<sup>4</sup>, Skåne, and Öland. The geographical proximity of vineyards and common climatic zones, as well as new emerging forms of cooperation between the producers is paving the way for the formalization of wine regions. In Skåne, Sweden's most vineyard dense county, producers have organized a Wine Route through the internet in order to help tourists find the various wineries (The Wine Route in Skåne 2011) and producers also cooperate through "Erfa-meetings" that provide a forum for solving problems and exchange of experiences. Erfa is a short version of the Swedish word erfarenhet that means experience. (Svensson 2011). Skåne is currently trying to become recognized as wine region by the EU. Formally becoming a wine region would allow producers to sell their wines as other than table wines. This is important because production costs force producers to charge a relatively high price per bottle. An overview of the wines listed at the retail monopoly in October 2011 shows that the average per liter amounts to between 261 and 368 Swedish crowns (€28,6 to 49,4), while table wines from South Africa, Italy and Spain, the most important wine countries for Swedish consumers are sold at an average of 60 to 70 crowns (€6 to 7) (Systembolaget, 2011). Since wines are only classified as table wines, producers are prevented from adding information about medals won at the competitions that are organized on a yearly basis (Bergstrom 2008).

Collaboration at the national level is also conducted through the Association of Swedish winegrowers. They organize courses and competitions, and conduct lobbying to highlight the needs and problems affecting the growers (Swedish winegrowers association 2011).

### 3.1 Sales and institutional constraints

Due to national alcohol regulation, the monopoly store, Systembolaget, is the only place where consumers can purchase alcoholic beverages to take home<sup>5</sup>. Winery gate sales are not permitted. Systembolaget has a national coverage and its assortment contains more than 7000 different wines. The assortment is divided into the standard collection that is available in most stores, and the special collection, that is only kept in a few special stores or that can be pre-ordered. The scales of operation of Systembolaget is an important constraint for Swedish wineries, because their production is limited. Swedish wines can be sold through the special collection and thanks to

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<sup>4</sup> A wine regions is here understood as a geographically demarcated area in which the final product is differentiated into different categories, linking the characteristics of the wine to the territory

<sup>5</sup> Alcohol purchased at restaurants must according to legislation be consumed within the establishment in which it is purchased.



a political compromise they can also be sold in the standard assortment of the shop/shops that are located closest to the vineyard in question (Systembolaget Information service 2011). The number of wines available at Systembolaget varies from month to month, but in October 2011 there were 11 red and 9 white and one icewine. (Systembolaget website 2011)

Because of the comparatively high price of Swedish wines, it is important for producers to create an emotional relationship with their customers that is not based on the flavor/price relationship, but that rather leans towards a consumer/place relation. One way of doing this is of course to build up an effective story-telling. This is an established practice around the world.

Swedish vineyards work consciously to build their image using the name of the place as a vineyard name and building their story telling with a strong connection to the territory (See for example, Åhus Vineyard, Kullahalvöns Vineyard). Research about how to build successful brands shows that building a brand based on the local market is a viable option, especially for new and small enterprises (Kafperer 2002). Promoting products by connecting them to the origin can provide consumers with two stimuli, one where they feel affinity with the region and one where they feel affinity with the product (e.g. small-scale craftsmanship). Consequently, regional products can take advantage of both consumers' sense of belonging to the origin region and their involvement with the product category the product belongs, which can result in consumer loyalty and future survival for the producer (van Ittersum et al, 2003). Consequently, the prohibition against gate sales not only limits the possibility of selling at a specific moment in time, it also limits vineyards possibility to effectively build a strong brand.

In order to sell their wines some producers are forced to sell their wines to the Swedish market from abroad. Wines are sent to a foreign agent and re-imported when a customer has placed an order. Those wineries that have restaurants can serve their wines on sight but customers are now allowed to take them home (Amnegård 2010 and <http://www.hallakravin.com/> 2011).

In spite of the difficulties, producers try to sell their products through Systembolaget. This has however, not been easy. According to Göran Amnegård who has managed to sell wine through the standard collection of Systembolaget, he was asked a few years ago to replace the bar codes on the wine labels for an order that was ready for deliver. He was forced to buy new labels at a cost that far exceeded the returns on that occasion (Amnegård 2010). This exemplifies the problems caused by the contradicting structures between Systembolaget and Swedish wineries.

Wine tourism is, by international standards, an important source of revenue for vineyards and especially for small ones. It improves cash flows and reduces distribution costs. In addition, it facilitates the establishment of an experience-based emotional relationship between the consumer and the wine. In light of the limited scale of operations, wine tourism and sales on sight can be a potential alternative for Swedish vineyards. But since gate sales are not allowed, Swedish winemakers have for years conducted lobby change current legislation (Amnegård 2010).

In connection with the launching of the Government's project "Sweden a new culinary country", the state's reluctance to allow gate-sales became difficult to defend. The goal of the project is to promote rural development by strengthening the food sector and especially of small scale food production. Strategically this project is of great importance in a period under which the creation of post-industrial work opportunities is needed. A vehicle to achieve the goals is to remove all the obstacles against small scale elaboration of food and beverages.

The debate led to a government inquiry about gate-sales 2010. The outcome was in favor of gate-sales but says that sales must also include foreign operators (Nordling 2010). The results

divided political parties in two strands, the first that looks at a rural development perspective and that claims that wine and beer producers should not be treated differently than the other 700 farms that sell their elaborated products on sight. This strand is also part of the new National Strategy that aims to create 10,000 new jobs in the rural and the food sector (Ministry of Agriculture 2008). Gate sales are also seen as beneficial for the tourism industry (Motion 2010/11: So408). The second strand claims that gate-sales are negative for public health. This position can be illustrated by the Minister of Social Affairs, she expressed that *"I will not participate in anything that could threaten the existence of Systembolaget"* (SVD 2011). As a solution Systembolaget proposed that it should be possible to order the products when consumers are visiting the vineyard and that the products could be picked up at any of the 412 stores of the monopoly. This is of course not the same as gate-sales (Gergen 2009).

#### **4. Final remarks**

The emergence of the wine sector in Sweden was made possible by a change in climate in combination with the abolition of the production and wholesale monopoly after Sweden's EU accession. The development in Sweden proves a change in terroir caused by climate change. In addition, it is the result of what in theory and politics is known as the *"the new rurality"*. The concept stands for the new trends that lead to farm diversification, complemented by tourism and other activities and services, run sometimes even as part-time agricultural activities. Even though quantities produced are still kept at a low level, production in Sweden is expected to increase, not the least because temperatures are expected to continue to rise during the coming decades. The immediate survival of the wine sector is challenged by an institutional frame that was developed hundred years ago to meet the demands of a rising temperance movement. The question of whether gate-sales will be allowed by the Parliament has not yet been decided but meets important resistance. In all its dimensions, this case illustrates how lands that were totally marginalized for wine production in the past, can become valorised for such a venture as the result of climate and institutional change.

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