



SCHOOL OF
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How Do Firms Strategically Navigate Competing Sustainability Demands Under Conditions of Systemic Uncertainty?

by

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Abstract

Sustainability-oriented firms increasingly operate under conditions of systemic uncertainty, where ecological, commercial, and legitimacy-related pressures converge simultaneously and resist singular strategic resolution. Despite growing scholarly interest in sustainability-oriented Business Model Innovation (BMI), existing research has devoted limited attention to how firms navigate competing sustainability demands under such conditions and how consumer-level dynamics shape responses to sustainability-oriented BMI.

This study addresses this gap through a convergent mixed methods design centred on Oatly AB, a Swedish plant-based food company operating in the German and Swedish markets. Six semi-structured expert interviews and a consumer survey (n = 168) examine firm-level sustainability tensions and demand-side purchasing dynamics. Both strands were integrated through a joint display analysis to generate metainferential conclusions.

The findings indicate that sustainability tensions are structurally persistent and increasingly shaped by institutional adversity, referring to a condition in which regulatory complexity expands while political commitment to sustainability transition simultaneously weakens. At the firm level, sustainability-oriented BMI operates through strategic layering, governance-level institutionalisation, and enabling conditions supporting long-term adaptation. At the consumer level, sustainable PB emerges as conditional upon functional product performance rather than environmental concern. Regression analysis establishes taste as the primary predictor of purchase frequency, followed by brand trust, while sustainability attitudes exhibit secondary influence. Convenience and health did not predict outcomes.

The study contributes to the BMI, paradox theory, and consumer behaviour literatures by identifying strategic layering, governance-level BMI, legitimacy asymmetry, institutional adversity, and communicative uncertainty as theoretical extensions. Collectively, the findings position invisible sustainability, defined as the structural embedding of sustainability commitments without continuous rhetorical foregrounding, as the strategic direction most consistent with conditions of systemic uncertainty and sustainability normalisation. Rather than resolving sustainability tensions, firms appear to navigate them by embedding sustainability into governance structures and functionally superior products that generate consumer trust, sustaining both commercial viability and long-term sustainability commitment.

Keywords: Business Model Innovation; Sustainability; Systemic Uncertainty; Paradox Theory; Consumer Behaviour; Sustainable Consumption; Attitude-Behaviour Gap; Mixed Methods; Theory of Planned Behaviour

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List of Abbreviations

AI	-	Artificial Intelligence
BM	-	Business Model
BMI	-	Business Model Innovation
CO ₂	-	Carbon Dioxide
CSR	-	Corporate Social Responsibility
ESG	-	Environmental, Social & Governance
EU	-	European Union
PB	-	Purchasing Behaviour
PF	-	Preliminary Framework
PSM	-	Price Sensitivity Meter
RQ	-	Research Question
SA	-	Sustainability Attitudes
SD	-	Standard Deviation
SDG	-	Sustainable Development Goals
SRQ	-	Sub-Research Question
TPB	-	Theory of Planned Behaviour
UN	-	United Nations
VUCA	-	Volatility, Uncertainty, Complexity, & Ambiguity

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1 Introduction

The past decade has produced a paradox at the heart of business strategy. Sustainability has never been more institutionally demanded, and yet the commercial conditions for delivering it have rarely been more uncertain.

1.1 Background

Sustainability has become one of the defining strategic imperatives of the contemporary business environment. Across industries and geographies, firms are under growing pressure to demonstrate that economic returns are pursued in ways that are ecologically responsible, socially legitimate, and consistent with the values of an increasingly scrutinising set of stakeholders. Regulatory frameworks are tightening, investor expectations are shifting, and consumers in many markets are expressing stronger preferences for products and firms that align with their environmental and social concerns. For firms that have chosen to position sustainability at the core of their strategy, these developments represent both an opportunity and a profound challenge (Chandler, 2021).

For much of the twentieth century, the dominant view held that firms carried precisely one social responsibility, to increase their profits (Friedman, 1970). Shareholder primacy was not merely an academic position but a governing logic that shaped corporate strategy, executive incentives, and investment decisions. The commercial imperative itself remains unchanged. A shift has occurred in the environment in which firms pursue their objectives and in the range of obligations these objectives now entail (Porter & Kramer, 2011).

The shift began with the emergence of corporate social responsibility (CSR) as a serious field of inquiry. Bowen (1953) first argued that firms bear obligations to society that extend beyond profit, and Carroll (1979, 1991) refined this into a framework of simultaneous economic, legal, ethical, and philanthropic responsibilities. However, for much of the following decades, CSR remained a largely voluntary and reputationally driven practice, peripheral to core strategy and entirely consistent with Friedman's view (1970) that social engagement was permissible only insofar as it served the bottom line.

The landscape shifted materially with the emergence of Environmental, Social, and Governance (ESG) frameworks in the early 2000s. The United Nations (UN) introduced ESG into mainstream financial discourse, arguing that firms with strong ESG practices were better positioned for long-term value creation (UN Global Compact, 2004). ESG transformed sustainability from a reputational concern into an investment criterion, bringing institutional

capital markets into direct alignment with sustainability expectations. The growth of ESG-linked assets under management, estimated to exceed 30-trillion US dollars globally by the mid-2020s (PwC, 2022), reflects the degree to which sustainability has been institutionalised within capital allocation processes, making Friedman's sharp separation between shareholder value and social responsibility increasingly untenable in practice.

The adoption of the UN Sustainable Development Goals (SDG) in 2015 added a further dimension to this landscape. The SDGs established a global normative framework of seventeen goals through which governments, civil society, and increasingly the private sector are invited to orient their activities toward shared planetary and social objectives (United Nations, 2015). For firms, the SDGs have functioned both as a legitimacy framework and as a source of strategic pressure, as investors, regulators, and customers have increasingly expected demonstrable alignment with specific goal areas. The Paris Agreement of the same year reinforced this by establishing binding national commitments to emissions reduction (UNFCCC, 2015), creating the regulatory context within which firm-level sustainability decisions are made and evaluated.

However, these developments have not produced a stable or predictable strategic environment. The cumulative effect of tightening regulation, growing ESG scrutiny, evolving SDG expectations, and shifting consumer preferences has been to create an operating environment characterised by what strategic management scholars describe through the concept of VUCA: volatility, uncertainty, complexity, and ambiguity (Bennett & Lemoine, 2014). The recent history illustrates each of these dimensions. The COVID-19 pandemic exposed the volatility of global supply chains and triggered a sudden regression toward conventional consumption as economic anxiety displaced sustainability as a consumer priority (Hobbs, 2020). The war in Ukraine and escalating instability across the Middle East demonstrated the uncertainty that geopolitical shocks introduce into input costs, sourcing decisions, and the competitive price differential between conventional and plant-based alternatives (FAO, 2023; Noguez et al., 2026). The inflationary wave that followed added a layer of complexity by compressing household purchasing power across the Eurozone precisely among the consumer segments most likely to pay sustainability premiums, creating conditions in which sustainability attitudes (SA) and purchasing behaviour (PB) diverged sharply (Eurostat, 2026). Additionally, the ambiguity inherent in this environment is reflected in the inconsistency of regulatory frameworks across markets, the contested translation of scientific findings into strategic imperatives, and the multiplicity of stakeholder claims about what responsible firm behaviour requires. The result is creating a strategic environment where firms must act despite uncertain future conditions.

Many firms have made genuine and far-reaching sustainability commitments. The deeper difficulty lies in the coordination problem that follows. Sustainability encompasses a multidimensional set of demands spanning ecological boundaries, social responsibilities, and commercial viability simultaneously. A firm committed to reducing its carbon footprint may face sourcing decisions that create tensions with fair labour standards. The practice of pricing products to reflect the true environmental cost of production may result in the exclusion of consumer segments whose adoption would otherwise maximise the firm's systemic impact. Furthermore, a firm that builds its brand on radical sustainability credentials may find that the consistency requirements of that positioning constrain its strategic flexibility in ways that undermine commercial resilience. These tensions are structural features of the strategic landscape within which sustainability-oriented firms operate. Navigating them demands an ongoing, system-level balancing act conducted under conditions of legal, political, market, and institutional uncertainty.

Nowhere are these structural tensions more visible than in the global food and agriculture system, which stands among the most consequential contributors to the environmental crisis of the twenty-first century. Accounting for approximately one third of total global greenhouse gas emissions, the food system simultaneously drives land use change, biodiversity loss, freshwater depletion, and soil degradation at a scale that no other single economic sector matches (Crippa et al., 2021; Poore & Nemecek, 2018). Yet, the sustainability challenge in food and agriculture extends well beyond its ecological footprint. The sector has been implicated in a range of social sustainability failures, including child labour and exploitative working conditions in commodity supply chains, the displacement of smallholder farmers by industrial agriculture, and the structural inequities that determine who bears the costs of sustainable production and who benefits from it (Willoughby & Gore, 2018). Agriculture alone accounts for 70.9% of all child labour globally among children aged five to seventeen, making it the sector with the highest incidence of child labour worldwide (ILO, 2017). The food system thus represents a multi-dimensional sustainability challenge in which ecological, social, and commercial imperatives intersect, compete, and at times directly contradict one another.

For companies that Koch (2020) describes as “citizen activists”, those that mobilise consumers around systemic change in food production and consumption as opposed to only selling a sustainable product, systemic uncertainty becomes a structural consequence of the positioning itself rather than merely an external condition to be managed. These companies are challenging existing ideas, asking for policy changes like making Carbon dioxide (CO₂) labelling

mandatory, and using their brand identity to back up sustainability claims. By doing this, they go beyond traditional market logic and operate in a world with more regulatory and social uncertainty. A variety of stakeholders are continually verifying that the company is acting properly. These stakeholders span investors, regulators, consumers, and civil society, each with competing demands and verification logics (Freeman, 1984). For these companies, systemic uncertainty becomes constitutive of the strategy they have chosen to follow.

1.2 Problematization and Research Question

The concept that runs through these developments and that gives the VUCA conditions their distinctive character in the sustainability context is what this thesis terms systemic uncertainty (Bennett & Lemoine, 2014). As employed in this thesis, systemic uncertainty refers to a structural condition that is fundamentally distinct from ordinary business risk, which can be quantified, hedged, or managed through conventional planning instruments. At the regulatory level, it takes the form of evolving and often inconsistent policy frameworks governing emissions, packaging, supply chain transparency, and sustainability reporting, leaving firms to invest in long-term strategic commitments without reliable knowledge of which standards will apply or how they will be enforced. Ecologically, it reflects the complexity of environmental systems and the contested translation of scientific findings into strategic imperatives, where the relationship between firm-level decisions and ecological outcomes is rarely linear or predictable. In market terms, it surfaces in the volatility of consumer behaviour, the unpredictability of input costs, the competitive pressure of private-label substitution, and the difficulty of anticipating at what price point and under what conditions sustainability-oriented products will achieve mainstream commercial viability. Finally, at the social level, it emerges in the multiplicity of competing stakeholder claims about what responsible firm behaviour requires, generating legitimacy risks that no single strategic choice can fully resolve (Bennett & Lemoine, 2014; Chandler, 2021).

The significance of this condition lies in what it implies for strategic decision-making. Firms operating under conditions of systemic uncertainty cannot rely on static business model (BM) configurations to sustain competitive advantage. The capacity to recognise shifting sustainability demands and reconfigure the value creation, delivery, and capture logic of the BM accordingly constitutes an ongoing organisational necessity rather than a periodic strategic exercise, and one that becomes particularly demanding when the sources of pressure are simultaneously ecological, social, and commercial in character (Teece, 2010). Hahn et al. (2015) add a further and equally important dimension, demonstrating through the lens of

paradox theory that the tensions sustainability introduces into firm strategy are not temporary problems that resolve once the right decision has been made, but persistent paradoxes that resurface in new forms as conditions evolve and that require continuous organisational navigation rather than one-time structural solutions. Taken together, these propositions establish the core motivation of this thesis. Sustainability-oriented firms must develop the capacity to reconfigure their BM effectively under conditions they cannot fully control, and that the tensions they face in doing so are irreducible features of the strategic landscape rather than correctable inefficiencies. It is this intersection of dynamic pressure and persistent tension that the central research question (RQ) of this thesis addresses.

This empirical reality has received insufficient theoretical attention. The existing literature on business model innovation (BMI) provides a valuable foundation for understanding how firms reconfigure their value creation, delivery, and capture logic in response to changing competitive conditions. Yet this literature has developed primarily in contexts shaped by technological disruption, market entry, and competitive repositioning. Foss and Saebi (2017), in one of the most comprehensive reviews of the BMI literature to date, acknowledge that definitional fragmentation and a lack of cumulative theoretical development remain persistent limitations of the field. It is fragmented in ways that limit its analytical purchase on the specific and demanding form of pressure that sustainability introduces. In addition, Boons and Lüdeke-Freund (2013) further identify the application of BMI frameworks to sustainability contexts as a comparatively underdeveloped strand of the literature, calling for theoretical approaches capable of accounting for the systemic and normative character of sustainability demands. The tensions that sustainability generates are persistent, multidimensional, and ethically charged in ways that render conventional optimisation logic inadequate. They cannot be treated as additional inputs to an otherwise tractable BM optimisation problem. A firm cannot simply trade off ecological integrity against commercial viability as it might trade off product breadth against cost efficiency. Sustainability, as Crane et al. (2014) argue, introduces genuine tensions that resist resolution through reframing alone, and that require ongoing organisational navigation rather than one-time structural solutions.

The theoretical gap is therefore not merely one of coverage but of analytical adequacy. BMI theory, as currently developed, does not adequately account for the conditions under which sustainability becomes a constitutive rather than a contextual feature of the BM, nor for the paradoxical tensions that this entails. Understanding how firms manage their BMs as they embark on sustainability strategies therefore requires a theoretical lens capable of holding

together the systemic, the paradoxical, and the commercial dimensions of the challenge simultaneously.

This thesis addresses this gap through an integrated examination of firm-level strategy and consumer-level behaviour. The central RQ is as follows:

How do firms strategically navigate competing sustainability demands under conditions of systemic uncertainty?

This question is addressed through three sub-research questions (SRQ) that together structure the empirical and analytical logic of the study:

SRQ1: What competing sustainability demands and tensions are most salient for a sustainability-oriented business?

SRQ2: How do firms respond to these tensions through business model innovation?

SRQ3: What consumer factors drive purchasing decisions of a sustainability-oriented firm?

Together, the three sub-questions address the main RQ from complementary angles, investigating the tensions firms face, the strategic responses they deploy, and the consumer-level conditions that determine whether those responses generate commercially viable outcomes.

The empirical context for the study is the plant-based food industry, a sector in which the tensions between sustainability ambition and commercial viability are particularly acute and well-documented. Within this context, the study focuses on a single sustainability-positioned firm operating across two European national markets, Sweden and Germany, enabling both depth of firm-level analysis and cross-national comparison of consumer-level dynamics. The combination of qualitative interviews with firm insiders and external industry experts, and a quantitative consumer survey conducted across two national markets, provides the empirical basis for addressing all three sub-questions within a coherent and integrated analytical framework.

1.3 Purpose and Contribution

This thesis makes contributions at both the theoretical and practical level, advancing understanding of how sustainability-oriented firms navigate competing demands under conditions of systemic uncertainty.

1.3.1 Academic Contribution

This thesis contributes to the academic literature in two principal ways. The first contribution is theoretical. By applying the lens of BMI to the specific challenge of sustainability-related tensions, the study extends the BMI literature into a domain it has not yet systematically addressed. Existing BMI research has examined how firms reconfigure their BMs in response to technological disruption, market entry, and competitive pressure (Foss and Saebi, 2017). Furthermore, this thesis argues that sustainability introduces a qualitatively different form of pressure, one that is simultaneously ecological, social, and commercial in character, and that requires a correspondingly more complex analytical treatment. The integration of paradox theory and stakeholder theory into the BMI framework, as developed in Chapter 2, provides a more adequate theoretical foundation for understanding sustainability-oriented BMI than existing accounts have offered.

The second contribution is empirical, specifically a convergent mixed methods examination of both the firm-level strategic logic and the consumer-level commercial conditions of sustainability-oriented BMI. Such studies remain rare in the existing literature. By combining qualitative examination of firm-level responses with quantitative analysis of consumer PB across two national market contexts, this thesis generates empirical insights that are directly relevant to the theoretical framework and that illuminate dimensions of the RQ that neither strand could address in isolation. The cross-national comparative dimension adds further empirical value, enabling the study to assess the extent to which consumer-level conditions are shaped by national market context and to identify the boundary conditions of sustainability-oriented BM strategies.

1.3.2 Practical Contribution

This study also carries practical implications for firms navigating the strategic challenges of sustainability. The findings identify a repertoire of sustainability navigation strategies that practitioners can draw on when designing and adapting sustainability-oriented BMs under conditions of systemic uncertainty. These include temporal positioning, narrative management and structural solutions to the attitude-behaviour gap. The cross-national findings further provide market-specific guidance on how price sensitivity, brand trust, and SA vary across different institutional and cultural contexts, with direct implications for the design and adaptation of sustainability-oriented value propositions in international markets.

1.4 Outline of the Thesis

The thesis is structured as follows: Chapter 2 develops the theoretical framework, reviewing the literature on BMI, sustainability-related tensions, enabling conditions, and consumer behaviour, and synthesising these strands into a preliminary framework (PF) that guides the empirical study. Chapter 3 presents the methodology, detailing the research design, case selection, data collection procedures, analytical approach, and quality criteria. Chapter 4 presents the empirical findings from both the qualitative and quantitative strands. Chapter 5 discusses the integrated findings in relation to the theoretical framework and the existing literature. Chapter 6 concludes by reflecting on the contributions, limitations, and implications of the study for research and practice.

2 Literature Review

This chapter develops the theoretical foundations of the empirical analysis across two interconnected analytical strands. The first strand concerns the firm, examining how BMs function as architectures of value creation, delivery, and capture, how and why firms innovate them in response to environmental change, and what specific pressures, tensions, and enabling conditions characterise sustainability-oriented BMI. The second strand concerns the consumer, examining how purchasing decisions are formed and what demand-side factors determine the commercial viability of sustainability-oriented value propositions. Together, these two strands provide the conceptual basis for the empirical analysis conducted in Chapter 3 and 4.

2.1 Business Models as a Lens for Firm Adaptation

Understanding how firms navigate competing sustainability demands requires an analytical starting point capable of capturing the full architecture of firm behaviour, rather than isolating individual decisions or resources. This section establishes the BM as the starting point, by defining the BM concept and situating it within the broader strategy literature, before examining the internal structure and interdependencies that give it analytical power. The objective is to identify and explicate the specific attributes of the concept that are instrumental to this thesis. These include its system-level character, its configurational logic, and its capacity to encompass the multiple dimensions of firm activity that are concurrently influenced by sustainability pressures.

2.1.1 Defining the Business Model

At its core, the BM describes the design or architecture through which a firm creates, delivers, and captures value (Teece, 2010). What distinguishes this concept from narrower strategic frameworks is its system-level character, directing attention to the logic that ties them together into a coherent whole rather than to individual decisions or resources in isolation. Zott et al. (2011) confirm this in a comprehensive review of the literature, finding that despite persistent definitional variation, a growing consensus has formed around the BM as a distinct unit of analysis, one that explains how firms “do business” in an integrated, holistic sense. This integrative quality is foundational rather than incidental. Sustainability-related pressures tend to affect multiple dimensions of firm activity simultaneously, making an analytical lens capable of capturing their systemic implications necessary.

2.1.2 Core Components and Interdependencies

The analytical power of the BM becomes more concrete when its internal structure is examined. Osterwalder and Pigneur (2010) offer one of the most widely adopted conceptualisations,

organising the BM into nine interrelated building blocks that together span the full logic of how value is proposed, created, and monetised encompassing the value proposition and customer-facing elements on one side, and the underlying resource, activity, and financial architecture on the other. While the precise taxonomy of components varies across frameworks, the more important insight is structural. The BM is not a collection of independent decisions but a configuration of mutually reinforcing elements. Hedman and Kalling (2003) reinforce this by situating the BM within the broader strategic and competitive context of the firm, emphasising that its components do not operate in isolation but are embedded in a wider web of resources, relationships, and market conditions. Morris et al. (2005) extend this further, arguing that the BM simultaneously integrates economic, operational, and strategic dimensions making it one of the few analytical constructs capable of representing the firm as a coherent whole rather than as a set of discrete functions.

This configurational logic carries important implications for the present thesis, because BM elements are interdependent, change rarely stays contained. A shift in the value proposition may cascade into adjustments in supply relationships, resource commitments, pricing structures, or customer communication. Teece (2010) and Zott et al. (2011) both highlight this systemic quality as being central to the BM's analytical relevance in strategy and innovation research. This relevance is particularly acute in the context of sustainability, where pressures rarely originate at a single point in the value chain but surface across multiple dimensions simultaneously. An analytical framework that can hold these dimensions together, rather than treating them in isolation, is therefore necessary. The BM, understood as an interdependent system of value creation, delivery, and capture, provides exactly that. Because BMs are not static configurations but evolving systems, the next step is to examine how and why firms innovate them over time.

2.2 Business Model Innovation

If the BM represents the logic through which a firm creates, delivers, and captures value, then BMI describes the deliberate reconfiguration of that logic in response to changing conditions, opportunities, or strategic imperatives. The concept has attracted growing scholarly attention precisely because competitive advantage increasingly depends not only on what firms offer, but on the originality and resilience of the underlying model through which they operate. To innovate a BM is therefore not simply to introduce a new product or enter a new market. It means fundamentally rethinking the architecture through which value is organised and appropriated at the firm level.

2.2.1 Why and When Business Models Need to Change

Johnson et al. (2008) are among the first to systematise this insight, arguing that transformative industry change is often driven not by product or technology innovation alone, but by the introduction of fundamentally different BM architectures, which redefine how value is created and captured at a systemic level. The analytical significance of this contribution argues that the most substantial form of innovation is frequently imperceptible at the product level and only becomes evident when the complete logic of the BM is examined. Firms that successfully innovate their BMs do not merely offer something new, they reorganise the system through which value flows, often in ways that are difficult for competitors to imitate precisely because the advantage resides in the configuration rather than in any single component (Barney, 1991).

A central distinction in this regard concerns the scope and depth of change involved. However, not all BMI are of equal significance, with some modifications being incremental, refining existing configurations without altering their fundamental logic, while others are more fundamental in scope, displacing the core architecture through which the firm operates (Foss and Saebi, 2017; Johnson et al., 2008). Foss and Saebi (2017) distinguish between modular BMI, which modifies individual components with contained strategic risk, and architectural BMI, which reconfigures the relationships between components and carries greater transformative potential alongside greater organisational complexity. As Zott et al. (2011) demonstrate, the systemic interdependence of BM elements is a key factor in this regard. The mutual interdependence of components leads to the production of non-linear effects that tend to spread across the model, making them difficult to predict or control.

2.2.2 Business Model Innovation as a Response to Environmental Change

Understanding why firms pursue BMI requires attention to the external conditions that make change necessary. Teece (2010) situates BMI within a broader theory of dynamic firm behaviour, arguing that in environments of rapid change and deep uncertainty, the capacity to design and refine the BMI is an ongoing strategic capability rather than an exceptional managerial task, one that depends on managerial cognition and dynamic capabilities to recognise and act on the need for change effectively. Foss and Saebi (2017) further establish the concept as a distinct field of inquiry while acknowledging that definitional fragmentation remains a persistent challenge, with scholars differing on whether BMI refers to changes in individual components, shifts in the overall model architecture, or entirely new model configurations. This fragmentation reflects the relative youth of the field and the breadth of empirical contexts in which BMI has been studied from technology startups to incumbent industrial firms, from market disruption to regulatory adaptation. For the purposes of this thesis,

BMI is understood as the intentional modification of one or more core elements of the BM, whether in the value proposition, the activity system, or the underlying revenue and cost logic with the aim of improving firm performance, responding to environmental shifts, or securing long-term strategic positioning.

While the BMI literature provides a valuable conceptual foundation for understanding how and why firms reconfigure their BMs, firms pursuing deep sustainability ambitions face a more specific and demanding form of BM pressure, a form of pressure that requires dedicated analytical attention.

2.3 Business Model Innovation under Sustainability Pressure

Sustainability introduces a qualitatively different form of strategic pressure than conventional competitive or technological disruption. Unlike market entry threats or technological obsolescence, sustainability pressure is simultaneously ecological, social, and commercial in character. The resulting demands are characterised by their complexity and structural incompatibility. Consequently, firms may encounter strain in one dimension due to progress in another, and a single reconfiguration of the BM may not suffice to address the tension in a permanent manner. This section looks at the challenges of sustainable BMI, including tensions in BMI decisions and how firms respond.

2.3.1 Why Sustainability Creates a Special Form of Business Model Pressure

The growing recognition that firms bear responsibility not only toward shareholders but toward a broader set of stakeholders and societal concerns has fundamentally reshaped the strategic landscape in which BMs operate (Freeman, 1984). Sustainability is no longer a peripheral concern managed at the margins of firm strategy. It has become a core dimension of how firms define their purpose, organise their activities, and compete for legitimacy and resources. Chandler (2021) argues that strategic management must be reoriented around a systems-level understanding of value creation that accounts for the firm's embeddedness in social and ecological systems, requiring instead that sustainability be embedded within the firm's core logic of value creation. This framing represents a significant departure from shareholder-centric views of the firm and implies that the BM itself must therefore be reconceived accordingly.

Porter and Kramer (2006, 2011) approach this shift through the lens of shared value, arguing that the competitive advantage of firms in the long run is increasingly tied to their ability to generate value for society alongside economic returns. Their framework challenges the assumption that social and environmental responsibility are inherently in tension with profitability, proposing instead that firms which embed sustainability into their core strategy,

instead of treating it as corporate philanthropy or risk management, are better positioned to identify new markets, strengthen their value chains, and build durable competitive positions. While this view has been influential, it has also attracted significant critical scrutiny. Crane et al. (2014) argue that the shared value framework underestimates the structural tensions between commercial logic and genuine sustainability commitments, presenting what are often difficult and politically contested trade-offs as though they were managerial optimisation problems. This critique is analytically important, suggesting that sustainability does not simply expand the strategic opportunity set, but introduces genuine tensions into the BM that cannot be dissolved through reframing alone.

The stakeholder literature provides an additional and complementary lens for understanding why sustainability creates a distinctive and particularly demanding form of BM pressure. Freeman (1984) establishes the foundational argument that firms must attend to the interests of all parties who affect or are affected by their activities if they are to sustain legitimacy and long-term performance. Building on this, Mitchell et al. (1997) refine this framework by developing a typology of stakeholder salience based on the attributes of power, legitimacy, and urgency, providing a basis for understanding why some sustainability-related demands receive greater managerial attention than others. The normative dimension of this argument was extended by Donaldson and Preston (1995), who argue that attending to stakeholder interests is not merely instrumentally advantageous but morally required. By contrast, Jensen (2002), cautions against unrestricted stakeholder pluralism, arguing that without a clear objective function, firms risk becoming strategically incoherent, a concern that becomes particularly acute when multiple stakeholder groups make competing sustainability demands. Taken together, these perspectives suggest that sustainability pressure is not a unified force, but rather a complex, multi-directional set of demands originating from customers, investors, regulators, civil society, and supply chain partners. Simultaneously, these demands must be navigated by firms with strategic intentionality.

This complexity is further intensified by what might be called the consistency and credibility challenge. Sustainability-oriented firms are evaluated not only on what they claim, but on whether those claims are coherently aligned with their broader operational and strategic reality. A strong environmental value proposition may lose legitimacy if it is contradicted by sourcing controversies, labour conditions, pricing decisions, or broader inconsistencies across the BM. Crane et al. (2014) are particularly important here because they warn against assuming that social and economic goals naturally align, underscoring that sustainability not only creates strategic opportunities but also generates persistent risks of inconsistency, contestation, and

legitimacy loss. It is precisely this combination of multidimensional pressure, competing stakeholder expectations, and the requirement for strategic coherence across the full BM that makes sustainability a qualitatively different form of BM pressure than conventional competitive or technological disruption.

2.3.2 Sustainability-Related Tensions in Business Model Decisions

The pressure described above does not translate into simple one-dimensional trade-offs. Rather, the corporate sustainability literature suggests that sustainability-related demands are often persistent, overlapping, and difficult to reconcile fully. Hahn et al. (2010) argue that trade-offs in corporate sustainability are not exceptional but pervasive. Frequently, firms face situations in which economic, environmental, and social objectives cannot all be maximised simultaneously, and where improvement in one area may create strain in another.

Hahn et al. (2015) develop this argument further by drawing on paradox theory to reframe sustainability tensions not as problems to be solved but as persistent paradoxes to be managed, a distinction which is introduced in Chapter 1. The objective is not to eradicate the tension, but rather to cultivate the organisational capacity to manage it productively. Applied to the BM context, this implies that firms facing sustainability pressures cannot simply redesign their models to achieve a stable equilibrium between social, environmental, and economic objectives. Instead, they must develop ongoing capabilities for navigating tensions that will continue to resurface as market conditions, stakeholder expectations, and regulatory environments evolve.

These tensions matter specifically at the BM level because they affect several interdependent elements at once. A stronger sustainability commitment may influence how the value proposition is framed, which customer segments can be reached, how products are priced, how supplier relationships are organised, and how margins are maintained. More responsible sourcing, for example, may strengthen legitimacy while increasing costs. Greater affordability may support market accessibility while putting pressure on the economic conditions required to sustain premium sustainability standards. Scaling the business may improve reach and market impact while exposing the firm to doubts about authenticity or operational consistency. The BM is therefore the relevant level of analysis because sustainability-related pressures cut across the full architecture of value creation, delivery, and capture simultaneously.

Smith and Lewis (2011) provide a broader theoretical foundation for this perspective, identifying persistent organisational tensions as inherent rather than constitutive features of firms that pursue multiple interdependent goals. Their argument implies that the tensions documented above are not symptoms of poor strategic design but structural features of any

organisation that simultaneously pursues objectives that cannot be fully reconciled. Lewis (2000) similarly argues that such tensions become particularly acute during periods of innovation and transformation, when emerging imperatives surface latent contradictions within existing business logic. Furthermore, Jay (2013) extends this to hybrid organisations pursuing both commercial and social missions simultaneously, showing that competing institutional logics generate tensions requiring ongoing organisational strategies rather than one-time solutions. Together, these perspectives suggest that sustainability-related tensions in BM decisions are best understood as balancing challenges rather than bounded trade-offs.

2.3.3 Sustainability-Oriented Business Model Innovation

The recognition that sustainability introduces persistent tensions into firm strategy naturally raises the question of how firms respond at the level of the BM. Sustainability-oriented BMI has emerged as a distinct strand of the broader BMI literature, concerned specifically with how firms reconfigure their value creation, delivery, and capture logic in ways that integrate environmental and social objectives alongside economic ones. This literature is united by the premise that sustainability cannot be adequately addressed through isolated product innovations, philanthropic initiatives, or incremental process improvements.

Boons and Lüdeke-Freund (2013) provide one of the foundational contributions to this literature, arguing that sustainable BMI requires changes across all core elements of the BM simultaneously. The value proposition must reflect genuine social and environmental commitments, the supply chain must operate within ecological boundaries, the customer interface must promote sustainable consumption, and the financial model must distribute value equitably across stakeholders. Critically, Boons and Lüdeke-Freund (2013) argue that these requirements are interdependent. Sustainability-oriented changes in one element of the BM create pressures and constraints for others, meaning that fragmentary or modular approaches to sustainable BMI are unlikely to be sufficient. This systemic perspective reinforces the analytical logic developed in Section 2.1 and underscores the importance of examining sustainability-oriented adaptation at the level of the full BM architecture.

Bocken et al. (2014) complement this by developing a typology of sustainable BM archetypes, ranging from models that maximise material and energy efficiency, to those that create value from waste to those that pursue sufficiency or deliver functionality rather than ownership. Their typology illustrates the breadth of strategic responses available to firms pursuing sustainability-oriented BMI, and the extent to which different archetypes imply fundamentally different configurations of value creation, delivery, and capture. Furthermore, Geissdoerfer et al. (2018)

extend this perspective by situating sustainable BMI within the broader context of sustainability transitions, arguing that the most consequential forms of sustainable BMI are those that contribute not only to firm-level competitive advantage but to systemic change in the industries and value chains within which firms operate. This systems-level ambition introduces additional strategic complexity, as firms must navigate not only their own internal reconfiguration but also the institutional, market, and stakeholder dynamics that shape the broader transition context.

As outlined in Chapter 1, Koch (2020) advances the notion of the “citizen activist” brand concept, which signifies a firm that is restructuring its entire BM to mobilise consumers towards systemic transformation in food production and consumption, as opposed to merely providing a sustainable product. For such firms, sustainability is not a peripheral feature of the value proposition, but its constitutive logic is embedded simultaneously in the brand narrative, the pricing strategy, the communication architecture, and the supply chain design. Koch's case study exemplifies that a sustainability-oriented BMI, operating at its most ambitious level, does not merely optimise a single component of the BM, but rather engages in a comprehensive system-wide restructuring, centred on a normative purpose. In the process, it introduces the consistency requirements, legitimacy pressures, and strategic constraints that the paradox literature identifies as structural features of sustainability-oriented firm strategy.

Lüdeke-Freund et al. (2018, 2020) further develop the theoretical foundations of sustainable BMI, examining the patterns and principles through which firms successfully integrate sustainability into their BM logic. Their work highlights that sustainable BMI is rarely a linear or fully planned process, it typically involves experimentation, iteration, and the navigation of significant internal and external resistance. Matos and Silvestre (2013) reinforce this by examining the role of stakeholder collaboration in enabling sustainable BMI, finding that firms which successfully develop sustainability-oriented BMs tend to engage actively with a broader range of stakeholders than those pursuing conventional BMI.

Importantly, the sustainable BMI literature also offers a critical corrective to overly optimistic accounts of sustainability as a straightforward source of competitive advantage. Not all sustainability pressures translate into win-win outcomes, and not all attempts at sustainable BMI succeed in reconciling environmental or social ambitions with commercial viability. The tensions identified in Section 2.3.2 do not disappear at the BM level, they are, in many cases, most acutely felt precisely there. Despite these contributions, the sustainable BMI literature has developed primarily in contexts shaped by technological disruption and resource innovation. The specific challenge facing firms that have positioned sustainability as constitutive of their

brand identity, rather than as an operational or technical improvement, has received comparatively little systematic attention. The extant literature does not adequately theorise how such firms navigate the legitimacy tensions, communication constraints, and commercial pressures that arise precisely because of their sustainability positioning. The present study aims to address this gap in the literature.

2.4 Organisational Capacities for Sustainability Navigation

Navigating the tensions described in Section 2.3 requires not only strategic intent but organisational capacity. The strategic management literature identifies three conditions: dynamic capabilities, absorptive capacity and organisational ambidexterity. Collectively, these three conditions form a cohesive set of organisational prerequisites. A firm may possess dynamic sensing capability yet lack the absorptive capacity to translate external sustainability knowledge into coherent strategic responses, or it may develop both without the ambidextrous capacity to pursue change without undermining its existing commercial foundation. The following sub-sections examine each condition in turn, with particular attention to the aspects most directly relevant to sustainability-oriented BM navigation.

2.4.1 Dynamic Capabilities

Teece et al. (1997) introduce the concept of dynamic capabilities to explain why some firms can adapt successfully to rapidly changing environments while others are not. They define dynamic capabilities as the firm's ability to integrate, build, and reconfigure internal and external competences in response to rapidly shifting conditions. This distinguishes them from ordinary operational capabilities, which enable firms to perform existing activities efficiently and positions them as the source of sustained competitive advantage in dynamic contexts.

For the purposes of this thesis, the most analytically relevant dimension of Teece et al.'s (1997) framework is its tripartite structure of sensing, seizing, and reconfiguring. In the sustainability context, sensing refers to the capacity to identify and interpret signals of change in the external environment, shifts in stakeholder expectations, regulatory developments, and emerging ecological pressures, before they become acute. Seizing refers to the ability to mobilise resources and commit to new strategic directions in response to those signals. Reconfiguring refers to the capacity to transform existing assets, routines, and BM configurations to align with new strategic imperatives.

For sustainability-oriented firms specifically, this tripartite capacity is particularly demanding because the signals to be sensed are multidirectional and often contradictory, ecological pressures may point in one direction while commercial conditions point in another. Firms that

develop the capacity to sense these tensions early, commit to strategic responses before competitors, and reconfigure their BMs accordingly are better positioned to pursue sustainability-oriented BMI effectively. Eisenhardt and Martin (2000) offer a complementary perspective, arguing that dynamic capabilities are not individual and firm-specific but exhibit common features across firms implying that they can, to some extent, be deliberately developed and managed rather than merely inherited.

2.4.2 Absorptive Capacity

Cohen and Levinthal (1990) introduce the concept of absorptive capacity to explain why firms differ in their ability to benefit from external knowledge sources, arguing that the capacity to exploit new information is largely a function of the firm's existing knowledge base. Firms with higher absorptive capacity are better able to identify relevant knowledge in their environment, integrate it with existing competences, and apply it to commercial ends. In the context of sustainability-oriented BMI, this concept carries direct analytical relevance. The knowledge required to reconfigure a BM around sustainability objectives is rarely generated entirely within the firm. It draws on scientific understanding of ecological systems, evolving regulatory frameworks, stakeholder expectations, and emerging market developments. Firms that lack the internal knowledge structures to absorb and integrate these external inputs are likely to struggle to translate sustainability pressures into coherent BM responses, regardless of their strategic intent. Cohen and Levinthal's framework also highlights the cumulative and path-dependent nature of absorptive capacity, such that firms that have invested in relevant knowledge domains over time are better positioned to absorb new developments in those domains than those approaching them from scratch. For a firm operating at the intersection of ecological ambition and commercial pressure, this implies that the ability to absorb and apply sustainability knowledge is not a static condition but a capability that must be actively developed and maintained as the sustainability landscape evolves.

2.4.3 Ambidexterity

O'Reilly and Tushman (2008) conceptualise organisational ambidexterity as the firm's capacity to simultaneously exploit its existing BM and explore new configuration, a challenge that is particularly acute for sustainability-oriented firms. Firms pursuing sustainability ambitions cannot simply abandon their existing BM, they must continue to operate commercially while gradually or more radically reconfiguring the logic through which they create, deliver, and capture value. O'Reilly and Tushman (2008) argue that ambidextrous organisations that manage this tension through structural, cultural, or temporal separation of exploitative and explorative

activities are significantly better positioned to navigate periods of strategic transition than those that allow one imperative to crowd out the other.

For sustainability-oriented BMI specifically, ambidexterity implies the capacity to maintain commercial viability in the short-term while simultaneously investing in the deeper reconfigurations that sustainability demands require over longer time horizons. Firms that lack this capacity risk one of two failure modes. Either they preserve short-term performance at the expense of necessary long-term adaptation, or they pursue sustainability-driven transformation at a pace that undermines the commercial foundations on which that transformation depends. The concept of ambidexterity provides an important organisational lens for understanding both the enabling conditions for sustainable BMI and the constraints that firms face in pursuing it.

2.5 Consumer Behaviour and Commercial Viability

A sustainability-oriented BM can only succeed if consumers accept its value proposition at a price point compatible with its cost structure. BMI, therefore, requires not only changes in value creation and delivery, but also a clear understanding of the demand-side conditions under which those changes become commercially viable. In the context of sustainable consumption, this requirement introduces a fundamental analytical challenge, given that while many consumers express positive attitudes towards environmentally friendly products, these attitudes do not consistently translate into PB. BMs that rely solely on stated consumer preferences consequently risk remaining strategically speculative, anchoring their commercial logic in intentions that structural conditions may prevent from being acted upon. This section addresses that gap by reviewing the key theories of consumer behaviour that explain how purchasing decisions are formed and under which conditions pro-environmental intentions lead to actual behaviour. Building on the Theory of Planned Behaviour (TPB), these dimensions specify the consumer-facing conditions that enable or constrain the commercial viability of sustainability-oriented BMs, establishing the empirical boundary conditions within which the analysis of SRQ3 is situated.

2.5.1 Theory of Planned Behaviour

Understanding why consumers fail to act on their sustainability preferences is as important as understanding how those preferences are formed. The TPB, originally formulated by Ajzen (1985) and elaborated in Ajzen (1991), provides the foundational framework for analysing the determinants of consumer action. TPB proposes that actual behaviour is the proximate outcome of behavioural intention, which is itself shaped by three antecedent constructs. Attitude toward the behaviour captures the individual's positive or negative evaluation of performing it.

Subjective norms reflect the perceived social pressure from significant others to perform or refrain from the behaviour. Perceived behavioural control refers to the individual's belief in their capacity to perform the behaviour given available resources and anticipated obstacles (see Figure 1).

A key contribution of the TPB is the inclusion of perceived behavioural control as a direct predictor of both intention and behaviour, extending earlier models such as the Theory of Reasoned Action (Ajzen & Fishbein, 1980; Fishbein & Ajzen, 1975). This extension is particularly analytically relevant in the context of sustainable consumption, where external constraints frequently prevent consumers from acting in line with their preferences. In food purchasing contexts, perceived behavioural control is shaped by structural factors such as price premiums, limited product availability, and the effort required to integrate new products into existing routines, all of which can prevent consumers from acting on positive attitudes even when intentions are present.

From a BM perspective, this reframes the strategic challenge. Instead of assuming that insufficient demand reflects inadequate consumer awareness, firms must consider whether their value proposition enables consumers to act on preferences they already hold. Consumer behaviour, in this sense, is not only a matter of individual choice but a function of how well a BM aligns with the practical conditions of everyday consumption. This insight carries direct implications for BM design and provides the theoretical basis for the demand-side framework dimensions.

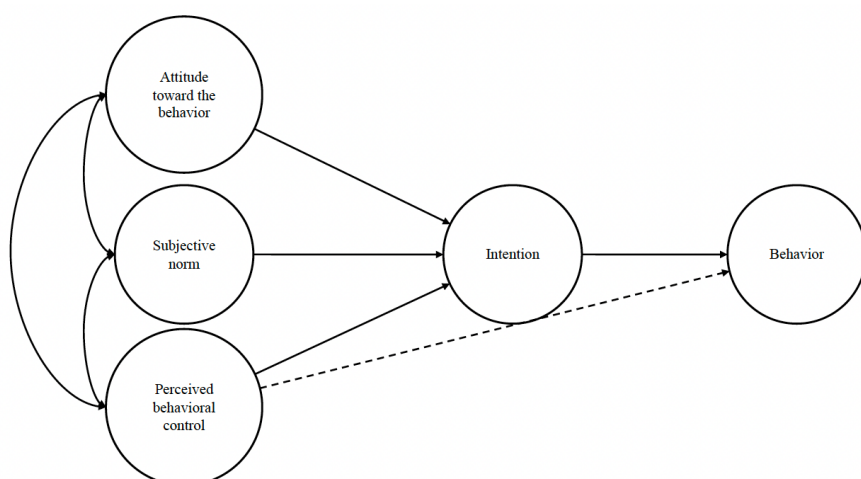


Figure 1: Theory of Planned Behaviour. Adapted from Ajzen (1991).

2.5.2 Values as Foundation of Sustainable Behaviour

Values provide the underlying foundation of attitudes and are therefore a critical starting point for understanding the origins of sustainable consumption. Schwartz (1992) conceptualises values as stable guiding principles that shape individual preferences and evaluations across contexts, identifying systematic tensions between value types. Most notably, these tensions arise between self-enhancement values, such as power and achievement, and self-transcendent values, such as universalism, which is most closely associated with pro-environmental concern (see Figure 2).

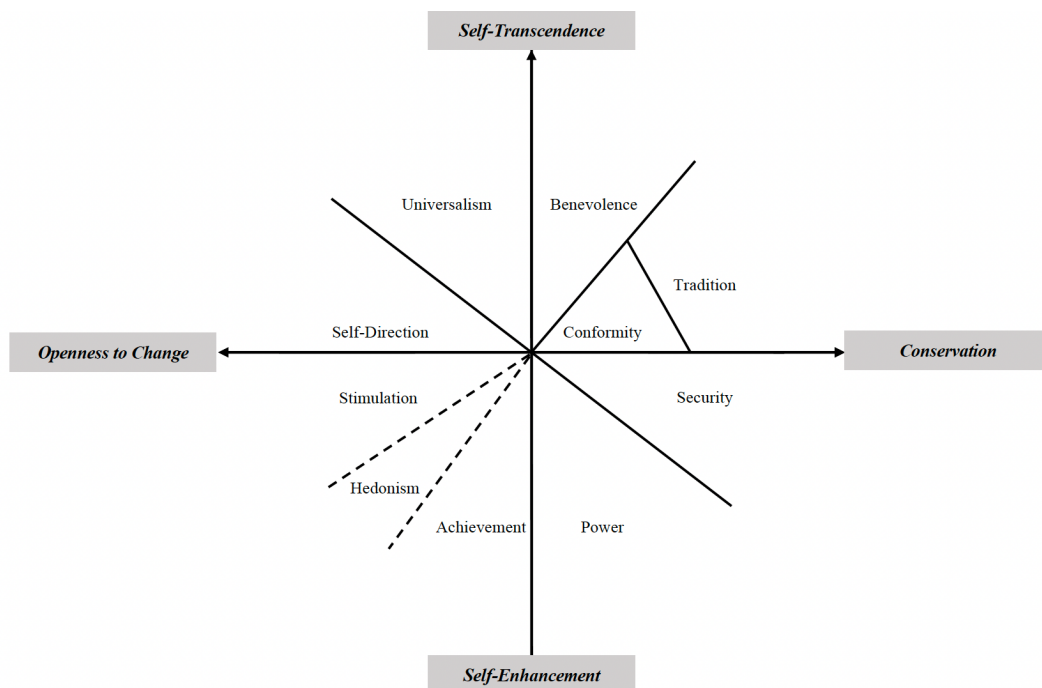


Figure 2: Relationship among Motivational Types of Values, Higher-Order Value Types and Bipolar Value Dimensions. Adapted from Schwartz (1992).

Yet the stability of sustainability-oriented values does not automatically translate into corresponding behaviour. Values provide the motivational foundation for sustainable consumption, but their expression in behaviour is contingent on the structural conditions that either enable or constrain action. The observed discrepancy between stated values and real behaviour can be attributed to the existence of external constraints that restrict individuals' capacity to act in accordance with their stated convictions (Kollmuss & Agyeman, 2002). This pattern is theoretically significant as it implies that the primary strategic challenge is not the absence of sustainability-oriented values but the difficulty of translating those values into purchasing action.

From a BM perspective, firms may create competitive advantage not by attempting to reshape consumer values, but by enabling value-consistent behaviour through accessible and practically integrated offerings.

2.5.3 The Attitude-Behaviour Gap in Sustainable Consumption

Despite the strong theoretical foundations provided by the TPB, the relationship between sustainable attitudes and actual PB remains empirically inconsistent. This discrepancy is commonly referred to as the attitude-behaviour gap. Kollmuss and Agyeman (2002) provide an influential analysis of this phenomenon, demonstrating that even when attitudes, norms, and perceived control are aligned, sustainable behaviour does not necessarily follow. The framework under consideration identifies a range of intervening factors that systematically weaken the link between intention and action. These factors can be categorised into two distinct groups, namely internal and external. The internal factors include habits, emotions and value conflicts. The external factors include infrastructure limitations, product unavailability, and price barriers. Critically, Kollmuss and Agyeman (2002) argue that this gap is not a temporary phenomenon that will diminish as environmental awareness increases, but rather a structural feature arising from the persistent mismatch between cognitive motivations and the material conditions of consumption.

Collins et al. (2007) provide the most direct empirical evidence of structural constraints in sustainability-related food purchasing, showing that environmental concern explains only a limited share of variance in sustainable PB, while factors such as price and convenience play a substantially larger role. Within the TPB framework, these factors operate as constraints on perceived behavioural control. Taken together, this body of literature suggests that the attitude-behaviour gap is not primarily a problem of insufficient motivation but a consequence of structural barriers that prevent consumers from acting on preferences they already hold. From a BM perspective, this shift in focus is towards reducing those barriers to adoption, such as improving price accessibility, ensuring product availability, and minimising the effort required to integrate products into existing routines. This is a more effective driver of adoption than further investment in environmental communication.

The attitude-behaviour gap documented in consumer behaviour literature is, therefore, partly a consequence of the sustainability tensions examined at the firm level. The premium pricing that sustainability-oriented production frequently necessitates exerts a direct constraint on consumer perceived behavioural control. The legitimacy pressures that sustainability-positioned firms face hinder their ability to communicate sustainability credentials in a coherent and trustworthy

manner. Moreover, the sustainability trade-offs that firms must navigate internally have a direct impact on the very product compromises that are made externally, in terms of taste, convenience, and price, and which in turn suppress consumer adoption.

2.5.4 Commercial Viability and Demand-Side Validation

The commercial viability of a sustainability-oriented BM depends on whether its value proposition meets the minimum thresholds across the attributes that dominate consumer purchasing decisions, a demand-side validation requirement that specifies the boundary conditions within which BMI must operate.

Lusk and Briggeman (2009) provide a domain-specific operationalisation of the attitudinal component of the TPB in food purchasing contexts. Their framework comprises eleven food values: taste, price, safety, nutrition, convenience, naturalness, animal welfare, environmental impact, appearance, origin, and fairness, arranged in a consistent hierarchy in which taste, price, and safety emerge as primary decision criteria, while environmental impact and animal welfare rank as secondary considerations. This hierarchy does not imply that sustainability attributes are irrelevant, but rather that they function as secondary rather than primary decision drivers, shaping but not independently determining consumer choice. They influence purchasing decisions only when core expectations concerning taste and price are already satisfied. For sustainability-oriented BM design, this implies that environmental credentials alone are insufficient as a primary value proposition for mainstream consumers.

Beyond taste, three further constructs from the Lusk and Briggeman hierarchy carry analytical relevance for the present study. Convenience constitutes a primary dimension of perceived behavioural control (Ajzen, 1991), encompassing both physical product availability and the ease with which products can be integrated into existing consumption routines. Reducing convenience barriers can substantially increase adoption rates, and Thøgersen and Ølander (2003) suggest that initial adoption may further generate spillover effects, increasing the likelihood of subsequent sustainable PBs. Health and nutritional value represent a third commercially significant purchase driver. Beacom et al. (2021) demonstrate that the most prominent motivations for plant-based consumption are taste and health, followed by environmental impact and animal welfare, confirming that personal motivations dominate over pro-social or environmental considerations even among consumers with a general sustainability orientation. Within the Lusk and Briggeman (2009) hierarchy, nutrition is prioritised above environmental impact but below taste and price, suggesting that health positioning can serve as

an accessible entry point for mainstream consumers not primarily motivated by environmental credentials.

The hierarchical structure delineated by Lusk and Briggeman (2009) serves as the fundamental organising principle for the demand-side framework of this thesis. Its application to a sustainability-oriented branded food product requires a strategic reduction in scope: of the eleven food values, five carry direct analytical relevance. Taste and sensory acceptability, health and nutritional value, convenience, and environmental impact are retained as core constructs, reflecting their established roles as primary and secondary purchase drivers. The values, safety, appearance, naturalness, origin, animal welfare, and fairness, are either analytically subsumed within these four constructs or insufficiently differentiated in a branded, processed food context to warrant independent operationalisation. The rationale for these decisions is elaborated in the instrument design section of Chapter 3.

Two constructs receive extended analytical treatment given their structural relevance to commercial viability. Price, while central to the Lusk and Briggeman (2009) hierarchy as a primary decision criterion, is treated as a structurally distinct variable rather than one purchase driver among many. It functions as a threshold constraint on perceived behavioural control within the TPB framework, when price levels exceed what consumers consider acceptable, behavioural intentions do not translate into action regardless of attitude strength (Ajzen, 1991; Collins et al., 2007). Accordingly, it is operationalised separately through Van Westendorp's (1976) Price Sensitivity Meter (PSM), which identifies acceptable price ranges by mapping consumer thresholds rather than measuring price as a scalar importance rating. Addressing price barriers directly is therefore essential if demand is to be expanded beyond highly committed consumer segments, whether through cost reductions enabled by scale, operational efficiency, or pricing strategies that reduce the perceived premium associated with sustainable products.

The second construct receiving extended treatment is brand trust, which does not appear in the Lusk and Briggeman (2009) typology, which is concerned with the content of purchasing priorities rather than the cognitive processes through which decisions are made. Its inclusion draws on Petty and Cacioppo's (1986) Elaboration Likelihood Model, which distinguishes between a central route of attitude formation, involving deep cognitive evaluation of product attributes, and a peripheral route that relies on heuristic cues such as brand recognition, packaging aesthetics, and peer endorsement, which operate independently of detailed information processing. In everyday consumption contexts where time and cognitive effort are

limited, the peripheral route typically dominates. Conversely, sustainability claims require effortful evaluation and are therefore predominantly processed through the central route, which limits their effectiveness among mainstream consumers who lack the time or inclination to engage with detailed environmental information. Brand trust functions as a peripheral-route heuristic that provides an immediate signal of quality and credibility without requiring such engagement. Firms that invest primarily in substantive environmental communication, like detailed carbon footprint data, supply chain transparency or certifications, are effectively targeting consumers already likely to purchase through the central route. Investment in brand consistency, product quality, and recognisability, by contrast, enables consumers to act on preferences they already hold without deep sustainability claim evaluation. Collins et al. (2007) provide empirical support for this mechanism, demonstrating that brand-related variables influence PB independently of environmental concern. The integration of brand trust as a sixth construct thus enables the framework to account not only for what consumers prioritise, but also for how those priorities are processed and converted into purchasing action, which is a distinction with direct implications for sustainability-oriented value proposition design.

2.5.5 Cross-National Perspective

Consumer behaviour is fundamentally shaped by its broader social and institutional context. Thøgersen (2011) demonstrates that subjective norms within the TPB vary systematically across national contexts, reflecting differences in how deeply sustainability is embedded in social expectations and institutional structures. In markets where sustainability norms are well established, consumers are more likely to perceive sustainable behaviour as socially expected, increasing the probability that intentions translate into action. Where such norms are less institutionalised, purchasing decisions are more strongly governed by individual-level constraints such as price and convenience, a pattern that carries significant implications for BM design in cross-national contexts.

This pattern is thoroughly documented in the specific national markets examined in this thesis. Grunert et al. (2014) conducted a cross-national study encompassing six European countries, including Germany and Sweden, finding that although consumers expressed medium to high levels of general concern about sustainability, this concern did not invariably translate into actual food PB. Additionally, the study demonstrates that understanding and use of sustainability labels remains limited even among consumers with positive sustainability orientations, thus reinforcing the argument that the attitude-behaviour gap is not primarily a

problem of insufficient environmental awareness but of structural conditions that vary systematically across markets.

Thøgersen and Ølander (2003) extend this by demonstrating that sustainable behaviour can generate spillover effects, with positive experiences of one pro-environmental action increasing the likelihood of engaging in others. Critically, this effect occurs only when the initial behaviour is intrinsically rewarding rather than externally imposed, underscoring the importance of internal motivation for sustained behavioural change. Together, these findings establish that both normative influence and behavioural reinforcement are context-dependent, varying systematically across national markets in ways that carry direct implications for BM design. Acceptable price premiums, effective communication strategies, and suitable distribution channels differ meaningfully between markets with strong institutionalised sustainability norms and those where such norms remain emergent. Consequently, scalable sustainability-oriented BMs require contextual adaptation rather than uniform implementation, a consideration that is relevant across countries.

Collectively, these analytical dimensions reframe consumer behaviour not as an independent area of inquiry but as the empirical specification of the boundary conditions within which BMI must succeed. The consumer-side analysis of SRQ3 is therefore to be interpreted as producing design constraints, informing directly the discussion in Chapter 5 regarding which forms of BMI are most likely to generate commercially viable sustainability value propositions.

2.6 Synthesis: An Integrated Analytical Framework

The preceding sections establish that sustainability-oriented BMI operates simultaneously at two analytically distinct but empirically interdependent levels. At the firm level, sustainability introduces persistent paradoxical tensions that resist resolution through one-time reconfiguration and require sustained organisational capacities, specifically dynamic capabilities, absorptive capacity, and ambidexterity, to navigate effectively. At the consumer level, the commercial viability of sustainability-oriented value propositions is determined by structural conditions that either enable or prevent those attitudes from being expressed in PB.

The central argument that emerges from the literature is that sustainability-oriented BMI is neither a straightforward strategic opportunity nor a discrete managerial problem. It represents an ongoing navigational challenge. Firms that pursue deep sustainability ambitions must simultaneously manage competing stakeholder demands, reconcile social and environmental objectives with commercial viability, and develop the internal capabilities required to pursue architectural rather than merely modular BM change. The tensions introduced by sustainability

into the BM do not resolve themselves through reconfiguration but persist across the value proposition, activity system, and financial logic of the firm. Effective navigation of these tensions, therefore, requires not a one-time redesign but a sustained organisational capacity. This capacity is grounded in the dynamic capabilities, absorptive capacity, and ambidexterity examined in Section 2.4.

At the same time, the demand-side analysis developed in Section 2.5 establishes that firm-level reconfiguration is necessary but not sufficient. A sustainability-oriented BM can only function as a viable architecture of value creation and capture if its value proposition translates into durable consumer demand. The TPB identifies the structural conditions under which this translation is most likely to occur, as well as the barriers that prevent it, even among consumers with positive sustainability orientations. The attitude-behaviour gap, the hierarchical structure of food values, the mediating role of brand trust, and the limits imposed by consumer price sensitivity together define the demand-side conditions shaping the commercial viability of sustainability-oriented BMI. These constraints are not peripheral to the BM. Rather, they are constitutive of it, shaping the boundaries within which the value proposition, pricing logic, and go-to-market approach must operate.

The integrated framework that emerges from this review therefore operates on two levels simultaneously, as illustrated in Figure 3. At the firm level, it asks how sustainability-oriented BMI is pursued, what tensions it surfaces, and what organisational conditions enable firms to navigate those tensions over time. In addition, at the consumer level, it asks whether the resulting value proposition generates the demand-side conditions required for commercial viability, and what specific factors mediate or constrain that outcome. These two levels are analytically distinct but empirically interdependent. The value proposition that consumers encounter is shaped by firm-level reconfiguration, while the commercial viability of that proposition is determined by consumer behaviour.

This two-level framework directly informs the structure of the empirical analysis and provides the basis for answering the central RQ: *How do firms strategically navigate competing sustainability demands under conditions of systemic uncertainty?* The framework integrates the three SRQ into a coherent analytical logic across two parallel strands. Systemic uncertainty functions as the overarching contextual condition within which competing sustainability demands emerge and strategic navigation becomes necessary.

The firm-level strand addresses SRQ1 and SRQ2. Competing sustainability demands and tensions function as the independent variable, examined through qualitative interviews. These

tensions trigger BMI responses as the mediating variable, which in turn determine commercial viability as the firm-level outcome. The consumer-level strand addresses SRQ3. Demand-side conditions are the independent variable, measured through a quantitative survey. These conditions shape consumer behaviour through the attitude-behaviour gap as theorised by the TPB, producing purchase behaviour as the consumer-level outcome.

The national market context functions as a moderating variable on the consumer strand, reflecting the insight that subjective norms and structural purchasing conditions vary systematically across national markets. Firm-level BM responses shape the value proposition that consumers encounter, while consumer-side outcomes determine whether that proposition is commercially viability. Integration across the two strands occurs at the level of meta-inference, where findings from both are interpreted jointly to address the main RQ.

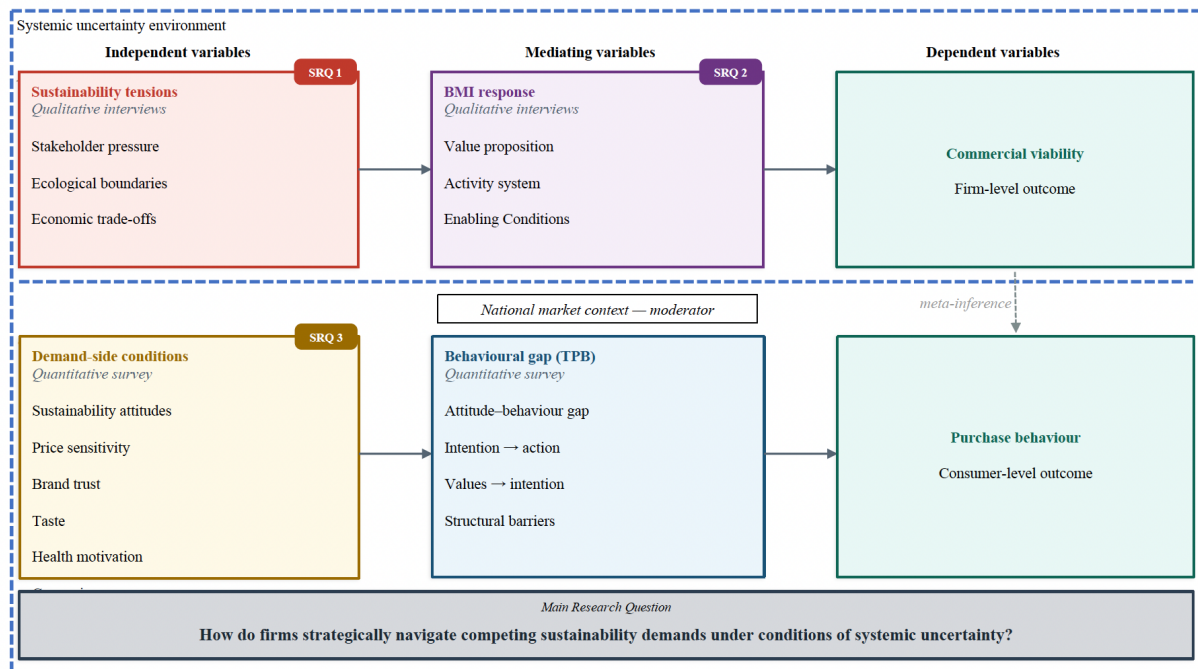


Figure 3: Preliminary Analytical Framework.

3 Methodology

This chapter presents the methodological framework adopted to address the RQ, accomplish the empirical objectives of the study, and generate findings that can be interpreted in relation to the theoretical framework developed in Chapter 2. The chapter is structured as follows: it covers the research approach and design (3.1), case selection (3.2), data collection (3.3), instrument development (3.4), data analysis and integration (3.5), validity and reliability (3.6), and ethical considerations (3.7).

3.1 Research Approach & Design

A research design constitutes a plan for connecting the initial RQ to the empirical data collected and the analytical procedures applied to interpret it (Creswell & Creswell, 2023; Yin, 2018). The selection of an appropriate design is therefore not merely a technical decision but a reflection of the nature of the RQ itself. As Alvesson and Sköldbberg (2018) argue, the epistemological assumptions embedded in a RQ must be made explicit before methodological choices can be adequately justified.

To address the complexity of the RQ, this study employs a convergent mixed methods design, following the methodological principles outlined by Creswell and Plano Clark (2018). In this design, a qualitative strand and a quantitative strand are conducted in parallel and independently, before being brought together in the integration phase to produce a theoretically grounded and empirically comprehensive account of the central RQ.

The qualitative phase operationalises the supply-side dimensions of the analytical framework, namely sustainability tensions and BMI, by examining how a sustainability-oriented firm perceives competing demands and responds through the reconfiguration of its value proposition, activity system, and revenue logic. The quantitative phase operationalises the demand-side dimension, namely consumer behaviour and commercial viability, by establishing empirical patterns in PB across two national market contexts. The integration phase evaluates whether the two strands of evidence converge, diverge, or complement each other, with the aim of generating a more comprehensive understanding of the commercial viability of sustainability-oriented BMI than either strand could produce alone (see Figure 4).

The epistemological foundation of the design is pragmatic (Morgan, 2007). Rather than committing to a single theoretical standpoint, pragmatism evaluates methodological choices by their capacity to generate answers to the specific RQ at hand. This makes it particularly appropriate for mixed methods research in which qualitative depth and quantitative breadth

generate complementary forms of analytical leverage, and in which the abductive movement between theory and data operates across both strands simultaneously.

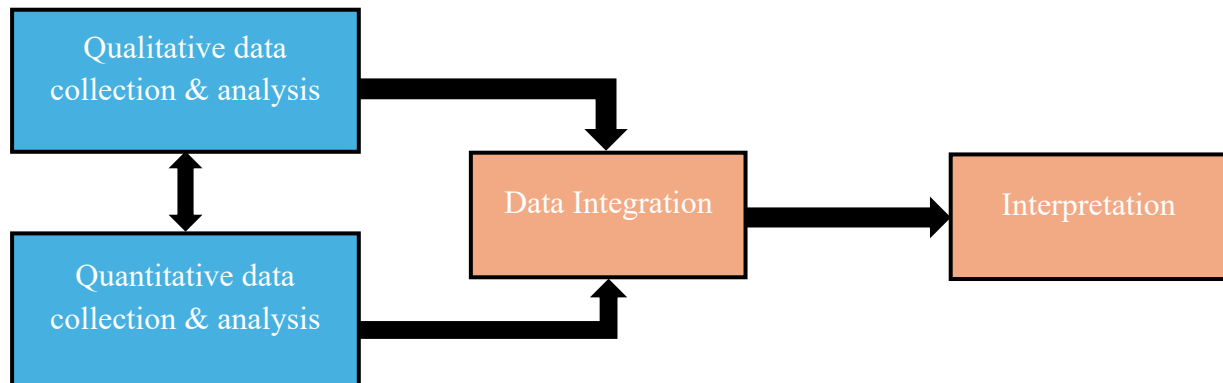


Figure 4: Convergent Mixed Methods Design. Based on Creswell and Plano Clark (2018).

This study adopts an abductive reasoning logic as its overarching epistemological stance. Rather than proceeding deductively from fixed hypotheses to confirmatory testing, or inductively from raw data to theory in the absence of prior conceptual orientation, abductive reasoning moves iteratively between theoretical frameworks and empirical findings (Dubois & Gadde, 2002; Lukka & Modell, 2010). The theoretical framework developed in Chapter 2, centring on BMI under sustainability pressure and the demand-side conditions shaped by the TPB, provides the initial analytical lens through which the empirical material is approached. However, this framework is treated not as a fixed set of propositions to be confirmed or rejected, but as a conceptual framework that the empirical findings may refine, challenge, or extend.

This approach is particularly appropriate for a study of this kind for two reasons. First, the RQ concerns a phenomenon, that is empirically underexplored at the firm level, making purely deductive testing premature. Second, the consumer-level dimension of the study, while theoretically grounded in established constructs, is examined in a specific cross-national and product-category context that may produce patterns not fully anticipated by existing theory. Abductive reasoning, therefore, enables the study to maintain theoretical rigour while remaining open to empirical surprise.

3.1.1 Qualitative Interviews

The qualitative phase of the study examines how a sustainability-oriented firm perceives, interprets, and responds to competing sustainability demands at the organisational level. Semi-structured interviews were selected as the primary qualitative instrument because they enable systematic exploration of theoretically relevant themes while preserving the flexibility required to follow emergent lines of inquiry that may not have been anticipated at the design stage (Kvale

& Brinkmann, 2015; Rubin & Rubin, 2005). This combination of structure and openness is particularly well-suited to an abductive research logic, in which the theoretical framework provides an initial orienting lens while the empirical material retains the capacity to challenge or extend it.

The qualitative strand comprises six semi-structured interviews with internal and external experts representing two complementary groups. These interviews provide direct insight into how firms interpret sustainability-related tensions, prioritise competing stakeholder demands, and make strategic decisions about the reconfiguration of their BM under conditions of systemic uncertainty. The qualitative strand captures firm-level dimensions of the RQ that fall outside the analytical scope of the quantitative strand by design. Together they provide the complementary evidence base required for the metainferential conclusions.

3.1.2 Quantitative Survey

The quantitative phase of the study operationalises the demand-side dimension of the analytical framework developed in Chapter 2, examining the consumer-level conditions that determine whether a sustainability-oriented BM generates commercially viable PB. The instrument is a structured online survey administered across two national market contexts, Sweden and Germany, through the researchers' networks, targeting approximately 180 respondents. A survey was selected as the quantitative method because it enables the collection of standardised, comparable data from a large and geographically diverse sample, making it particularly well-suited to detecting statistically meaningful patterns in consumer PB and cross-national variation (Creswell & Creswell, 2023). The standardised format further ensures that the same constructs are measured consistently across both markets, enabling direct comparison of consumer attitudes, PB, and price sensitivity at the national level.

3.1.3 Data Integration

The final phase of the convergent mixed methods design integrates qualitative and quantitative findings through a joint display analysis (Creswell & Plano Clark, 2018). Each strand is collected and analysed independently before being brought together at the interpretation stage, where the extent to which findings converge, diverge, or complement each other in addressing the central RQ is assessed. Where findings converge, the metainference identifies the most robustly supported conclusions. Where they diverge, the divergence becomes analytically productive, prompting reflection on the conditions under which firm-level strategic intentions and consumer-level behavioural realities align or come apart. Where strands are complementary, the metainference articulates how each addresses a distinct dimension of the

RQ. This produces a higher-order interpretation that neither strand could generate in isolation and that constitutes the primary analytical contribution of the mixed methods approach.

The integration process is structured around the four analytical dimensions of the PF developed in Chapter 2: sustainability tensions, BMI response, attitude-behaviour gap, and cross-national variation, as illustrated in Figure 5. Cross-national variation occupies a distinct position spanning both strands, reflecting its function as a moderating variable rather than an independent analytical dimension. For each dimension, qualitative findings derived from thematic codes and interview extracts are placed alongside quantitative results derived from construct rankings, regression coefficients, and the Van Westendorp analysis. This ensures that integration is theoretically grounded rather than impressionistic. Commercial viability constitutes the dependent outcome of interest across both strands and the empirical basis for addressing the main RQ.

	Qualitative Strand <i>Qualitative Interviews</i>	Quantitative Strand <i>Quantitative Survey</i>	Integration Phase <i>Data Integration</i>
Sustainability Tensions	Stakeholder pressure Ecological boundaries Economic trade-offs Legitimacy requirements	Sustainability attitudes Environmental concern Willingness to pay premium	Insights
BMI Response	Prioritisation of tensions Market positioning Value proposition Communication strategy Governance mechanisms	Brand trust Price sensitivity Purchasing decision factors	Insights
Attitude–Behaviour Gap	Firm-level perception of consumer barriers	Price vs. Brand vs. Sustainability vs. Taste vs. Convenience vs. Health	Insights
Cross-National Variation	Sweden & Germany as theoretically contrasting market contexts Home market vs. competitive international market		Insights

Figure 5: Research Design Overview. *Convergent Mixed Methods Design as Applied in the Present Study. Based on Creswell and Plano Clark (2018).*

Three constructs central to the analytical framework require explicit clarification regarding their empirical operationalisation. Commercial viability is not measured as a single financial metric but is operationalised across both strands of the study. In the qualitative strand it emerges through informant accounts of the conditions under which sustainability-oriented BM responses generate or undermine market traction. In the quantitative strand it is approximated through purchase frequency as the primary behavioural outcome variable and through the Van Westendorp PSM as an indicator of the price boundaries within which commercial viability is

achievable. Purchase behaviour is operationalised directly through the quantitative strand, with oat milk purchase frequency measured on a six-point ordinal scale serving as the dependent variable in the regression analysis and as the primary empirical referent for the attitude-behaviour gap examined in relation to SRQ3. Systemic uncertainty, as employed in this thesis, is not an empirically measured variable but a contextual condition that frames the entire study.

3.2 Case Selection

The selection of an appropriate empirical case is a foundational methodological decision that shapes the analytical scope, depth, and transferability of the research. In qualitative and mixed methods research, case selection is not driven by the logic of statistical representativeness but by the capacity of the case to illuminate the phenomenon under investigation with clarity and depth (Yin, 2018). The following sections present and motivate the selection of Oatly AB as the primary empirical focus of the study, and the selection of Sweden and Germany as the two national market contexts for the consumer survey.

3.2.1 Oatly AB

The empirical focus of this study centres on Oatly AB, a Swedish sustainability-positioned company operating in the plant-based food sector, specializing in oat-based food products. Founded in Lund in 1994, the company was established based on advanced enzymatic oat-processing technology developed at Lund University (Oatly, 2021). Oatly currently operates in more than 40 countries worldwide. Its mission is to make it easy for people to eat better and live healthier lives without recklessly taxing the planet's resources (Oatly, 2021). Oatly constitutes what Yin (2018) terms a revelatory case, as it offers unique access to a phenomenon that has not been investigated in depth before. This phenomenon is the strategic navigation of competing sustainability demands in a sustainability-positioned food firm. As a firm navigating the specific conditions of the contemporary plant-based food landscape, including mainstream market entry across multiple national contexts and the competing pressures that sustainability positioning generates for commercial strategy, Oatly offers direct empirical access to the phenomenon under investigation. Furthermore, as a firm whose funding mission explicitly integrates ecological, health and commercial objectives, Oatly embodies the both/and logic that Hahn et al. (2015) identify as characteristic of sustainability paradox, while simultaneously illustrating the structural tension that motivate the RQ. As a citizen activist brand in the sense developed by Koch (2020), it has repositioned sustainability not as a reputational add-on but as the constitutive logic of its entire BM, making it a particularly instructive case for examining how such positioning interacts with the commercial and legitimacy pressures that sustainability

introduces. The motivation for this case is further supported by the depth and accessibility of publicly available strategic documentation, and direct collaboration, which enables contextual grounding of the interview data and supports the credibility of the qualitative strand.

3.2.2 Market Selection Sweden and Germany

The selection of Sweden and Germany as the two national market contexts for the consumer survey was equally theoretically motivated, chosen for their complementary analytical value rather than for reasons of convenience or proximity.

Sweden represents Oatly's home market and the cultural and regulatory environment within which the firm's sustainability mission and brand identity were originally developed (Oatly, 2021). Furthermore, the Swedish market for milk substitutes has experienced modest growth, driven by increasing health awareness, the convenience of digital health services, and broader adoption of digital technologies. Consumer demand for plant-based milk substitutes is increasing, supported by a growing health and wellness trend, growing concern for animal welfare, environmental sustainability, and the prevalence of lactose intolerance and dairy alternatives (Statista, 2026). Moreover, the rising interest among the Swedish population in vegetarian and vegan diets has also contributed to the growing popularity of milk substitutes, with almond, oat, and soy milk being the most consumed options. This trend is predicted to endure as an increasing number of individuals prioritize ethical and sustainable food choices (Statista, 2026).

The Swedish plant-based food retail market reached a value of 2.22 billion kronor between 2020 and 2022, with a growth rate of 0.3 percent indicating broad market stabilisation rather than active expansion. (GFI Europe, 2023). During the macroeconomic shifts of 2022, plant-based milk sales uniquely increased, growing to 975.5 million kronor, which is equivalent to approximately 86.1 million Euro. Swedish consumers maintain the highest per capita consumption rate of plant-based milk in Europe and rank third overall for plant-based food consumption on the continent (GFI Europe, 2023). Sweden's incorporation of controls for home-market brand trust effects is a notable feature, as it facilitates the assessment of cross-national generalizability.

In contrast, Germany provides a mature and highly competitive European market, offering a valuable point of comparison. Evidence suggests that in sustainability-oriented markets such as Germany, Sweden, and the UK, consumers' willingness to pay a green premium has declined by five percentage points, possibly reflecting a shift in which sustainability is no longer perceived as a premium attribute but rather as a baseline expectation (Malby et al., 2025).

Germany is of strategic importance to Oatly in the context of its international business operations in continental Europe. It is the largest plant-based market in Europe, valued at 1.68 billion Euro in 2024, with the highest per capita expenditure on plant-based foods of the six countries, including Germany, France, Italy, the Netherlands, Spain, and the United Kingdom, in 2024, at 19.92 Euro per person per year (GFI Europe, 2025). In 2024, the German annual revenue generated by the sale of plant-based milk and milk-based beverages amounted to 595 million Euro, representing a 3.6% increase in comparison with the preceding year. Unit sales data reveals a 15.2% increase between 2022 and 2024 (GFI Europe, 2025). Private-label products have been shown to play an important role in the German market for plant-based milk. Their market share of total sales volume exhibited an increase from 48.4% in 2022 to 59.1% in 2024 (GFI Europe, 2025). Additionally, plant-based milk and beverages have become comparatively more affordable in relation to conventional milk, particularly within the private-label sector. This is likely to be a contributing factor to the ongoing growth in sales volume within the category, which has already achieved a high level of market penetration. Germany's plant-based retail infrastructure is well-developed, with extensive distribution across major supermarket chains and discounters. This ensures that plant-based products are accessible to mainstream consumers. In terms of sales volume, oat milk had the largest market share in 2024, at 69.6%. Furthermore, 37% of households bought plant-based milk at least once in 2024 (GFI Europe, 2025). The two-market design method is employed to examine the impact of national sustainability culture, institutional support, price sensitivity, and brand familiarity on purchasing decisions for sustainability-positioned products.

3.3 Data Collection

The collection of data for both strands of the study proceeded in parallel during April and May 2026. Conducting both phases simultaneously ensured that neither strand informed nor influenced the other before the integration phase, preserving the analytical independence that the convergent design requires (Creswell & Plano Clark, 2018). The following sections describe the data collection procedures applied to each strand in turn, detailing the sampling strategy, recruitment approach, and practical conduct of both the semi-structured interviews and the online survey.

3.3.1 Semi-Structured Interviews

The qualitative phase of the study comprised six semi-structured interviews with experts from the food industry, based in Sweden and Germany. The participants were divided into two groups. The initial group consisted of experts from Oatly, specialising in strategy, public affairs, and sales. The second group consists of external experts with substantive experience in the

sustainable food industry, providing an independent and comparative perspective on the competitive and institutional dynamics within which Oatly operates. The convergence of internal and external perspectives serves to contextualise firm-level accounts within broader industry conditions, thereby strengthening the analytical depth and interpretive range of the qualitative findings.

The semi-structured interviews were conducted virtually via Microsoft Teams, with an approximate duration of 45 minutes each. During data collection, both researchers were present during each interview. One individual was responsible for the formulation of questions, while the second assumed the role of an observer, taking careful notes and posing supplementary questions when deemed necessary. Interviews were recorded with explicit participant consent and transcribed word-for-word to ensure the highest degree of accuracy. In instances wherein the transcription of an interview was not obtained, detailed notes were taken during the interview. Recordings were transcribed using MAXQDA. Transcripts were reviewed and corrected by both researchers to ensure accuracy before analysis, with any identifying details removed at this stage in accordance with the anonymisation procedures described in Section 3.7.

The sampling strategy prioritised purposive selection, targeting individuals with specialised knowledge and direct professional experience relevant to the RQs (Patton, 2015). While most participants are based in Sweden, several occupy senior positions in sustainability-oriented organisations with operations across multiple European markets, ensuring that the perspectives gathered reflect both home-market and cross-national experience. Table 1 presents the professional profiles of all interviewees.

Interviewee	Oatly Employee	Residence	Department	Duration in Minutes
1	Yes	Sweden	Legal	49
2	No	Sweden	Innovation	39
3	No	Sweden	Innovation	40
4	Yes	Germany	Sales	46
5	No	Sweden	Innovation/Research	32
6	Yes	Sweden	Public Affairs	35

Table 1: Interviewee Participants.

The number of interviews was not determined in advance as a fixed target but was guided by the principle of theoretical saturation. Saturation is reached at the point in the data collection

process at which additional interviews cease to generate new themes, categories, or substantively significant insights (Lincoln & Guba, 1985). As Creswell (2018) notes, the sufficiency of qualitative data should be evaluated according to this criterion rather than by reference to a predetermined sample size, ensuring that analytical conclusions are grounded in the full range of relevant perspectives the empirical context can yield. In practice, saturation was monitored iteratively across the course of data collection. Following each interview, both researchers reviewed the emerging codebook and assessed whether new patterns continued to surface. Once successive interviews consistently confirmed existing themes without introducing new categories or extending existing ones in substantively significant ways, data collection was considered complete.

3.3.2 Survey

The quantitative data were collected through an online survey administered via Microsoft Forms and distributed to respondents through the researchers' networks. Data collection took place in parallel with the qualitative interviews during April and May 2026, in accordance with the convergent mixed methods design (Creswell and Plano Clark, 2018). The target sample of approximately 350 respondents was distributed across Sweden and Germany to ensure sufficient representation from each national market context for cross-national comparison. Eligibility was determined through two screening criteria administered at the outset of the survey.

All responses were anonymous, and no personally identifiable information was collected at any stage of the survey. Participants were informed of the voluntary nature of their participation and their right to withdraw at any time through a consent screen presented at the outset of the instrument.

3.4 Instrument Development

Both empirical instruments were developed iteratively and piloted prior to full deployment to assess clarity and practical feasibility. The following sections describe the development process for each instrument in turn.

3.4.1 Qualitative Instrument

The qualitative instrument consists of two semi-structured interview guides, one developed for Oatly employees and one for external industry experts. Although each guide is tailored to the specific professional profile and domain of expertise of the respective participant group, both share a common structural logic and thematic orientation, ensuring consistency of analytical focus across the full set of interviews. Both guides were designed with questions to

operationalise the supply-side dimensions of the analytical framework, namely sustainability tensions, strategic responses, and the BM reconfiguration through which firms navigate competing demands.

The guides were developed in accordance with established principles for semi-structured interview design in qualitative management research, prioritising open-ended question formulation to encourage elaboration and reflection rather than closed or confirmatory responses (Kvale & Brinkmann, 2015; Rubin & Rubin, 2005). Before each interview, the participant's professional background, organisational role, and geographic scope of experience were reviewed to enable targeted adaptation of question emphasis within the shared structural framework, ensuring that each interview drew most productively on the specific knowledge and perspective of the individual participant (Patton, 2015).

Each guide is organised around five thematic areas that correspond to the key analytical dimensions of the study. The first area comprises opening questions designed to establish professional context and situate the participant's perspective within the broader industry landscape. The second area invites reflection on sustainability tensions encountered in the participant's professional experience, exploring the nature, frequency, and perceived severity of competing demands across ecological, social, and commercial dimensions. The third area examines strategic responses, exploring the organisational capabilities and decision-making processes through which firms have prioritised and navigated competing sustainability demands. The fourth area addresses product, market, and consumer perspectives, exploring how firms experience and respond to consumer-side pressure in a business-to-consumer context and how they assess the commercial viability of their sustainability-oriented value propositions. The fifth and final area invites broader personal reflection on the phenomenon under study, offering participants the opportunity to surface insights or perspectives that the structured questions may not have caused.

Both guides were piloted with one participant from each group prior to full deployment, with minor wording adjustments made based on pilot feedback to improve clarity and question flow. The finalised guides are included in the appendix (see Appendix A and Appendix B).

3.4.2 Quantitative Instrument

The quantitative instrument was developed to operationalise the demand-side dimensions of the analytical framework established in Chapter 2, translating theoretically grounded constructs into measurable survey items that reflect the specific product category context of oat milk as a sustainability-positioned consumer product. The development process followed established

principles for survey instrument design in consumer behaviour research, including a review of validated scales where available, iterative item refinement, and pre-distribution piloting to assess clarity and internal consistency (Creswell & Creswell, 2023; Saunders et al., 2019). The instrument is structured into seven thematic sections covering screening and demographics, SA, oat milk consumption behaviour, drivers of oat milk purchasing, perception of the Oatly brand, price sensitivity and willingness to pay (see Appendix C).

The instrument opens with a screening and demographics section. Respondents were first asked to confirm their country of residence and their age, with those outside Sweden and Germany or under the age of 18 automatically redirected to a closing screen. Demographic items collected age as an open numeric entry, gender across four categories, and approximate annual household income across three bracketed ranges presented in both EUR and SEK to ensure cross-national comparability. Dietary profile was assessed through a five-category item distinguishing omnivore, flexitarian, vegetarian, vegan, and other respondents. Purchase frequency for both oat milk and conventional dairy milk was recorded on a six-point ordinal scale ranging from never to more than once a week. These items provide the demographic and behavioural covariates required for subgroup analysis and criterion validity assessment.

The first substantive construct, SA, operationalises the attitudinal component of the TPB as applied to sustainable food consumption, drawing on the framework established in Section 2.5.1. Five items were measured on a seven-point Likert scale covering environmental concern in food purchasing, personal commitment to reducing dietary footprint, willingness to pay a sustainability premium, active sustainability information-seeking, and sustainability as a dimension of personal identity. A sixth item embedded within this section functioned as an attention check, instructing respondents to select option four. Respondents who failed this check were flagged for exclusion prior to analysis. Willingness to pay a sustainability premium was additionally operationalised through a dedicated item in which respondents indicated the maximum percentage premium above the price of conventional dairy milk they would accept for sustainably certified oat milk, with response options ranging from no premium through increments of ten percentage points up to fifty percent and above. A reference price for conventional dairy milk of approximately 1.00 EUR or 11 SEK per litre was provided to anchor respondents' evaluations.

Price sensitivity was operationalised separately using Van Westendorp's (1976) PSM, which was selected in preference to a standard Likert-based willingness to pay item because of its

capacity to generate a richer and more behaviourally grounded picture of price constraint. Respondents were asked to evaluate prices for a standard one-litre carton of oat milk purchased in a supermarket across four open-ended threshold questions to ascertain the price at which oat milk would be considered so cheap as to raise quality concerns, the price at which it would represent a bargain, the price at which it would be considered expensive but still worth purchasing, and the price at which it would be so expensive as to preclude purchase under any circumstances. Respondents were instructed that their four responses should follow an ascending order. From these thresholds, two analytically relevant ranges are derived: the acceptable price range, bounded by the cheap and expensive thresholds, identifying the interval within which most respondents would consider purchase. The range of marginal buyers, bounded by the indifference price and the point of marginal cheapness, identifying the narrower interval within which conversion from consideration to actual purchase is most likely. The cross-national comparison of these ranges between Swedish and German respondents provides a direct empirical basis for examining how national market context moderates price sensitivity as a structural barrier to purchase.

Brand trust was operationalised through two items. A binary familiarity question first established whether respondents had prior awareness of the Oatly brand. Respondents who confirmed familiarity were then presented with five items on a seven-point Likert scale covering perceived sustainability credibility, pricing fairness relative to sustainability credentials, trust in sustainability claims, and the perceived authenticity and consistency of the brand's communications and practices. This operationalisation reflects the role of brand heuristics in peripheral route processing as discussed in Section 2.5.4, capturing both cognitive trust and affective brand perception dimensions.

Taste and sensory acceptability were measured through five items on a seven-point Likert scale covering the general importance of taste in food purchasing, the role of taste expectations in oat-based dairy decisions specifically, and a comparative assessment of oat-based alternatives against conventional dairy products on sensory performance. These items reflect the primacy of taste in the food values hierarchy established by Lusk and Briggeman (2009) and discussed in Section 2.5.4. Purchase frequency for oat milk was recorded separately on a six-point ordinal scale ranging from never to more than once a week, providing the primary behavioural outcome variable for the regression analysis described in Section 3.5.2.

Health motivation was captured through three items on a seven-point Likert scale covering the importance of health benefits in oat-based dairy purchasing decisions, the influence of nutritional content on product choice, and an overall perception of oat milk as a healthy alternative to conventional dairy milk. These items operationalise the secondary but commercially significant health purchase driver identified in Section 2.5.4 (Beacom et al., 2021).

Convenience was assessed through three items on a seven-point Likert scale covering product availability in regular supermarkets, ease of product preparation and consumption, and fit with existing daily habits and consumption routines. These items operationalise the perceived behavioural control dimension of the TPB, reflecting the extent to which structural accessibility enables or constrains consumers from acting on purchase intentions they already hold.

To facilitate cross-construct comparison, a single forced-choice item asked respondents to identify the one factor that most influences their oat milk purchasing decision from among price, taste, health, environmental impact, brand trust, and convenience. This item provides a direct-ranking complement to the importance scales and enables identification of the dominant purchase driver at the individual respondent level. Safety, naturalness, origin, animal welfare, appearance, and fairness were excluded from the instrument on grounds detailed in the instrument design rationale presented in Section 3.4.

Of the eleven food values identified by Lusk and Briggeman (2009), six were excluded from the survey instrument on theoretically grounded grounds. Safety, which ranks as the third most influential food value in their hierarchy, was excluded on the grounds that in branded, regulated food markets such as Sweden and Germany, consumers operate under an implicit assumption of baseline food safety established through regulatory oversight and brand reputation rather than actively evaluating it at the point of purchase. In this context, safety functions as a hygiene factor rather than a differentiating purchase driver, rendering it analytically indistinct from general product quality and unlikely to generate meaningful variance in responses across the sample. Naturalness and origin were excluded because, in the context of a branded, processed food product such as oat milk, these values are either not salient to consumers in the same way they are for fresh or unprocessed food categories, or are already captured within the broader SA construct through items addressing environmental impact and food sourcing concern. Animal welfare, while conceptually distinct from environmental impact, is analytically subsumed within the SA construct in the plant-based food context, where the decision to choose a plant-

based alternative over dairy inherently reflects a general sustainability orientation that encompasses animal welfare considerations. Appearance and fairness were excluded on the grounds that they are insufficiently differentiated in the context of a standardised, shelf-stable product category to generate the construct-level variance required for meaningful inferential analysis. The complete rationale for these exclusion decisions and their implications for construct coverage is further addressed in the limitations Section of Chapter 6.

3.5 Data Analysis

The analysis of empirical data followed procedures appropriate to the nature of each strand, with the qualitative and quantitative analyses conducted independently before being brought together in the integration phase. This sequential independence is a defining feature of the convergent mixed methods design and ensures that the findings generated by each strand reflect the internal logic of its respective analytical approach rather than being shaped by premature cross-strand comparison (Creswell & Plano Clark, 2018). Throughout both analytical processes, the abductive reasoning logic guided the movement between the theoretical framework and the empirical material, allowing findings to refine, challenge, or extend the conceptual expectations established in Chapter 2.

3.5.1 Qualitative Data Analysis

The qualitative data were analysed through a two-stage process that reflects the abductive reasoning logic governing the study. The first stage employed template analysis as described by King (2012), and the second stage employed thematic analysis as developed by Braun and Clarke (2006, 2019, 2022). The decision to combine these two approaches was driven by two analytically distinct objectives that a single method could not simultaneously serve. The first objective was to apply the theoretical framework developed in Chapter 2 systematically to the empirical material, ensuring that the analysis remained anchored in the conceptual foundations of the study. The second objective was to remain genuinely open to participant-driven patterns that extend or challenge that framework, patterns that a purely deductive analysis would risk overlooking. Template analysis serves the first objective through its structured, hierarchically organised coding template. Thematic analysis serves the second through its interpretive flexibility and its capacity to generate themes from the data rather than solely from prior theory. Although the two approaches carry different philosophical orientations, template analysis prioritises consistency and cross-case comparability, while thematic analysis foregrounds the researcher's interpretive agency, they are not incompatible when deployed sequentially within an abductive design. In such a design, the template functions as the theoretical entry point into

the data, while the thematic analysis pass functions as the corrective that prevents the template from foreclosing empirical surprise. Together, they operationalise the abductive movement between theory and data that characterises the study's epistemological orientation (Lukka & Modell, 2010).

The first stage of the analysis employed template analysis as described by King (2012), a flexible qualitative technique involving the development of a hierarchically organised coding template that is refined iteratively as analysis proceeds. Unlike grounded theory (Glaser & Strauss, 1967), which requires the researcher to begin without theoretical preconceptions, template analysis explicitly draws on existing theoretical concepts as a starting point, a logic consistent with the abductive orientation of this study. Unlike purely inductive forms of thematic analysis, it provides a hierarchically structured template particularly well-suited to the comparative dimension of the research design, as the same template can be applied systematically across both participant groups and both national market contexts. The initial coding template was constructed directly from the analytical framework developed in Chapter 2, organised around three primary dimensions: sustainability-related tensions (SRQ1), BMI responses and enabling conditions (SRQ2). The analytical procedure followed the stages outlined by King (2012), adapted to the specific requirements of this study. In the first stage, researchers read all transcripts in full and recorded initial observations in analytical memos. In the second stage, first-order codes were assigned by researchers, remaining close to the language and terminology of participants. In the third stage, first-order codes were clustered into second-order themes grounded in the theoretical framework. In the fourth stage, this initial template was applied systematically across all transcripts using MAXQDA, with the Code Matrix Browser facilitating pattern recognition across transcripts and systematic comparison between participant groups (see Appendix D). In the fifth stage, the template was refined, themes were merged, subdivided, or newly added as emerging patterns warranted, with all changes documented in the codebook change log (see Appendix E). Codes were organised into aggregated dimensions corresponding to the overarching analytical categories presented in the findings chapter, structured as a three-level abstraction from first-order concepts to second-order themes to aggregated dimensions.

Where participant-driven patterns emerged beyond the boundaries of the template, the analysis shifted to a thematic sensibility (Braun & Clarke, 2006), attending to meanings arising from participants' own framings and conceptual vocabularies rather than from the prior framework. This inductive pass followed an iterative process of generating initial codes, collating related

codes into candidate themes, reviewing these against both the coded extracts and the full dataset, and defining each theme in terms of the analytical claim it makes about the data rather than merely as a descriptive label. Themes generated through this process represent emergent analytical constructs not anticipated by the template, and where inductive codes did not map onto existing template categories, they were added and documented in the codebook change log (see Appendix E). Analysis throughout was conducted at a latent rather than purely manifest level, interpreting implicit meanings and underlying assumptions present in participants' accounts rather than restricting attention to surface-level statements (Braun and Clarke, 2022). Its capacity to accommodate both inductive and deductive analytical orientations suits the exploratory character of this strand of the study.

The integration of both stages follows an abductive logic in which neither stage is treated as superior or primary, but both contribute iteratively to the production of analytical understanding (see Figure 6). Template codes informed the reading of emergent themes, and emergent themes prompted retrospective review of template-coded material. For instance, the inductive identification of sustainability innovation shelving was not anticipated by the PF and prompted a retrospective review of earlier transcripts. This concept, referring to the deliberate deferral of sustainability solution commercialisation until market conditions align, had previously been coded under dynamic capabilities without capturing its temporally staged logic. In line with Yin's (2018) recommendation to apply pattern matching as an analytical technique in case study research, the empirical findings are systematically compared against the theoretical propositions derived from the analytical framework. Pattern matching involves assessing the extent to which observed empirical patterns correspond to theoretically anticipated ones, and where divergences occur, using these as the basis for theoretical refinement. This procedure structures the movement from empirical findings to analytical discussion, with qualitative findings presented in Section 4.1 and quantitative findings in Section 4.2, before both strands are integrated through the joint display approach in Section 4.3 to generate metainferential conclusions that inform the discussion in Chapter 5.

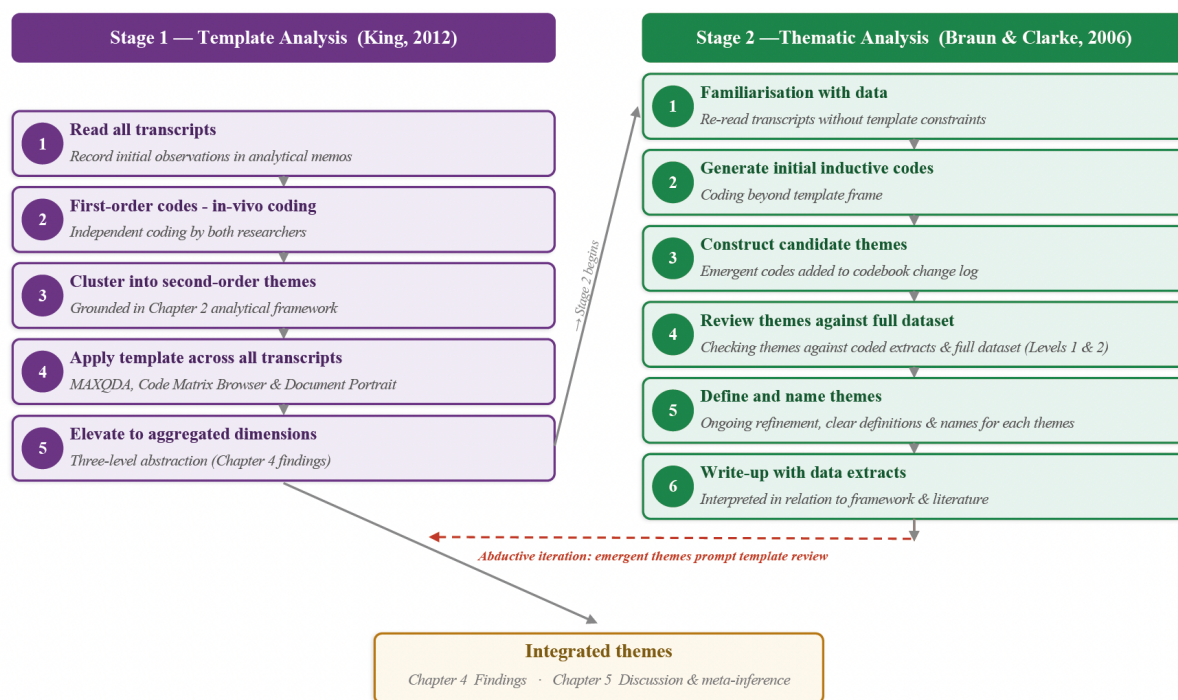


Figure 6: Qualitative Data Analysis Process. Based on King (2012) and Braun and Clarke (2006).

3.5.2 Quantitative Data Analysis

The quantitative data were analysed using R, following a structured analytical sequence designed to move from data preparation and descriptive overview through to inferential testing and cross-national comparison. The analytical approach was guided by the demand-side dimensions of the framework established in Chapter 2, with each analytical stage directly addressing one or more of the consumer-level questions raised by SRQ3.

Prior to analysis, the dataset was screened in two steps to ensure data quality. Respondents who selected a country of residence other than Sweden or Germany were automatically excluded through the survey's built-in screening logic and did not proceed beyond the first section. The remaining dataset was then screened for attention check failures and implausible response patterns, with respondents who failed the embedded attention check item or produced response patterns indicative of straight lining excluded from the final analytical sample. For the Van Westendorp PSM, all four price threshold entries were verified to contain numeric values in ascending order. No entries required exclusion on these grounds. Descriptive checks were conducted on demographic distributions across the Swedish and German subsamples to assess the comparability of the two groups and to identify any substantial imbalances in age, gender, income, or dietary profile that might confound cross-national comparisons.

Descriptive statistics were computed for all construct items and composite scales, including means, standard deviations (SD), and frequency distributions. For the purchase decision factor

constructs, mean importance ratings were calculated and ranked within each national subsample to establish the relative salience of price, taste, health, environmental concern, and convenience as drivers of oat milk purchasing decisions.

The internal consistency of each multi-item construct scale was assessed using Cronbach's alpha, with a threshold of 0.70 applied as the minimum acceptable level of reliability (Nunnally, 1978). Where reliability fell below this threshold, individual item-total correlations were examined to identify poorly performing items for potential exclusion or refinement. Construct validity was assessed through confirmatory factor analysis, examining whether the hypothesised factor structure across the six purchasing constructs was supported by the data. The pattern of correlations between SA, dietary preferences, income level, and willingness to pay a premium was examined as an additional check on criterion validity.

The primary inferential analyses examined the relationships between the six purchasing constructs and oat milk purchasing frequency, operationalised as the dependent variable of interest. Multiple regression analysis was used to assess the independent and relative contributions of price sensitivity, SA, brand trust, health motivation, taste, and convenience to purchasing frequency, enabling a direct empirical test of the relative predictive weight of each construct.

Independent samples t-tests and Mann-Whitney U tests were used to assess cross-national differences in construct means and purchasing frequency distributions between Swedish and German respondents, with effect sizes reported alongside significance values to contextualise the practical magnitude of observed differences.

The Van Westendorp PSM data were analysed by plotting the four cumulative price threshold distributions for the full sample and for each national subsample separately. The intersection points of these distributions were used to identify the acceptable price range and the range of marginal buyers for oat milk in each market. The acceptable price ranges derived from Swedish and German respondents were compared directly at both threshold endpoints to assess whether national market context produces meaningfully different price boundaries, providing an empirical basis for examining the cross-national moderating role of price sensitivity as a structural barrier to purchase.

The findings from the quantitative analysis were structured thematically in preparation for integration with the qualitative findings in the integration phase. For each of the six construct domains, the key quantitative patterns, including construct rankings, regression coefficients,

cross-national differences, and price threshold comparisons, were summarised in a format compatible with the joint display approach described in Section 3.1.3. This preparation ensured that the quantitative strand could be systematically compared with the thematic findings from the qualitative analysis, enabling the metainferential interpretation that constitutes the final stage of the convergent mixed methods design.

3.5.3 Data Integration and Metainference Analysis

The integration of qualitative and quantitative findings follows the joint display approach outlined in Section 3.1.3, moving from strand-level findings to a metainferential interpretation that addresses the central RQ and its constituent sub-questions. Whereas sections 3.5.1 and 3.5.2 describe the analytical procedures applied independently within each strand, this section describes the procedures through which the two bodies of evidence are brought together and interpreted in relation to one another.

The joint display was constructed around the key thematic dimensions of the analytical framework developed in Chapter 2, with each dimension represented by a row that presents qualitative findings, quantitative findings, and an integrated interpretation side by side. The qualitative findings entered the display were drawn from the finalised thematic codes with representative interview extracts selected to illustrate each theme. The quantitative findings entered the display were drawn from the regression outputs, construct rankings, cross-national comparisons, and price sensitivity analyses described in Section 3.5.2. For each dimension, the integrated interpretation column identifies whether the two strands converge, diverge, or complement each other, and articulates what this relationship implies for understanding the commercial viability of sustainability-oriented BMI.

The metainference was generated through a structured interpretive process in which the integrated findings across all four dimensions were examined collectively to assess what they reveal about the central RQ. This process followed the abductive reasoning logic described in Section 3.1, moving iteratively between the theoretical framework and the integrated empirical findings to identify patterns, tensions, and insights that neither strand could have produced alone. In instances where convergence was observed, the metainference identifies the conclusions most robustly supported. The observed divergence is examined through the lens of analytical insight, exploring the conditions that facilitate or impede the alignment between firm-level intentions and consumer-level realities. Conversely, where the strands are complementary, the metainference articulates how each addresses a distinct dimension of the RQ.

3.6 Validity & Reliability

This study employs a convergent mixed methods design, requiring rigorous attention to validity and reliability across both the quantitative and qualitative strands. The criteria applied to each strand reflect the epistemological commitments appropriate to the nature of the data and the analytical procedures involved, while three overarching strategies were applied across both strands to strengthen the overall quality of the research design (Creswell & Plano Clark, 2018).

In the qualitative strand, transferability was supported through the provision of thick descriptions of the research context and participant characteristics (Guba, 1981), enabling readers to assess the degree of fittingness between this study and comparable contexts to which transfer might be contemplated. Dependability was documented through an audit trail maintained in analytical memos throughout the project, recording the key analytical decisions and their rationale. Confirmability is ensured through reflexive memo writing that traces the researchers' evolving preconceptions and their influence on interpretation, reducing the risk of unacknowledged bias shaping the analytical conclusions (Guba, 1981).

Internal validity in the quantitative strand was strengthened through cross-national sampling and a standardised single-wave questionnaire administered consistently across both markets. Construct validity was supported through validated scales where available and expert review of purpose-developed items. Criterion validity was confirmed through the expected pattern of correlations between SA, dietary preferences, income level, and willingness to pay a premium, consistent with theoretical expectations. Internal consistency was verified through Cronbach's alpha across all multi-item scales, with all constructs meeting the 0.70 threshold except for the health construct (Nunnally, 1978).

External validity is constrained by the geographic scope of the study and the online recruitment method, both of which may result in an over-representation of digitally active and sustainability-oriented consumers relative to the broader population. This limitation is acknowledged and addressed in Chapter 6.

Three overarching strategies were applied across both strands to strengthen the overall validity of the research design. First, methodological triangulation was employed by integrating quantitative and qualitative findings, with both data streams cross-referenced to substantiate emerging patterns and identify areas of convergence and divergence. Second, conflicting evidence was actively sought throughout the analytical process to reduce overconfidence and encourage alternative interpretations (Eisenhardt, 1989). Third, credibility was established through sustained engagement with contextual and documentary data and peer debriefing

conducted at multiple stages of the research process with fellow students and the thesis supervisor, providing external validation of key analytical and interpretive decisions (Guba, 1981).

Convergence of findings between quantitative patterns and qualitative accounts was used to support causal plausibility (Creswell & Plano Clark, 2018). Where divergences were observed, these were treated as analytically productive entry points that refined rather than undermined the overall interpretation, consistent with the abductive reasoning logic described in Section 3.1.

In the quantitative phase, consistent survey procedures, harmonised demographic categories across the two national subsamples, and documented analytical procedures were employed to ensure that the analytical process could be traced and replicated.

3.7 Ethical Considerations

Ethical considerations were systematically incorporated at all stages of the research process, guided by the principles outlined by Creswell and Creswell (2023) and Saunders et al. (2019). These principles emphasise that acting ethically extends beyond merely obtaining consent and encompasses the full range of decisions made throughout the design, data collection, analysis, and reporting phases of a study. The research was conducted in accordance with the Guidelines for the Processing of Personal Data in Student Projects at Lund University School of Economics and Management (LUSEM, 2023), and was informed throughout by three core principles, namely the avoidance of harm, the principle of informed consent, and respect for privacy (Bell et al., 2019).

To avoid any potential negative consequences for participants, participation in the study was entirely voluntary and no form of pressure was applied when seeking access to potential interviewees or survey respondents. All participants were informed that they were at liberty to withdraw at any point and to decline to answer any question without consequence. The scheduling of interviews was adapted to suit the availability of each participant, with a view to minimising disruption to their professional commitments (Creswell & Creswell, 2023).

Informed consent was obtained from all participants prior to data collection. For the survey, consent was obtained digitally through a consent screen presented at the outset of the instrument, which outlined the study's purpose, the voluntary nature of participation, and the conditions under which data would be stored and used. Participants in the qualitative interviews

were provided with a comprehensive explanation of the study's objectives, scope, and their rights before confirming consent verbally at the commencement of each session

To protect the privacy of participants, interviewees are referenced by interview number throughout the study preventing identification while enabling consistent referencing, and all identifying details were systematically removed from transcripts prior to analysis (Saunders et al., 2019). No personally identifiable information was collected through the survey, and measures were implemented to ensure that individuals could not be identified either directly or indirectly through the data. All data were securely stored and accessible only to the research team.

3.7.1 Use of Artificial Intelligence Tools

To support the refinement of language and the execution of technical tasks throughout the research process, a range of artificial intelligence (AI) tools was utilised. ChatGPT-4o, Claude, Grammarly, and DeepL were used to enhance the grammar, clarity, and academic tone of written sections, and to assist with basic coding queries in R. Claude was additionally used to support the formulation of interview questions and the structuring of the survey instrument, ensuring that both were clearly worded and accessible to respondents (Lund University, 2025).

The protection of participant privacy was ensured throughout by excluding all empirical data, including interview transcripts and survey responses, from AI platforms at every stage of the research process. AI tools were used exclusively for writing enhancement and technical guidance, and played no role in data analysis, interpretation, or content generation. This approach is consistent with the ethical commitments outlined above and ensures compliance with applicable data protection regulations. A full account of AI tool usage is provided in Appendix F.

4 Empirical Data

This chapter presents the empirical findings from both strands of the convergent mixed methods design. Section 4.1 reports the qualitative findings through a two-stage combination. Section 4.2 reports the quantitative findings from a consumer survey across Sweden and Germany, examined through descriptive statistics, Van Westendorp price sensitivity modelling, and multiple regression analysis. In accordance with the convergent design logic (Creswell & Plano Clark, 2018), both strands are presented independently before being integrated in Section 4.3 through a joint display and metainferential discussion.

4.1 Qualitative Results

The qualitative strand of this study draws on six semi-structured expert interviews. Interviews are analysed, applying the template analysis and supplemented by the thematic analysis (Braun & Clarke, 2006; King, 2012). The resulting coding structure is organised across four thematic clusters: sustainability tensions, strategic BMI responses and organisational enabling conditions, emergent markets and consumer dynamics, and emergent codes capturing broader contextual and conceptual themes.

Across all six interviews, using both interview transcripts and detailed written notes from interviews that were not audio-recorded, a total of over 700 individual code applications were recorded. The highest coding density was concentrated within the sustainability tensions cluster. The analysis proceeded in two stages. First, deductively derived codes grounded in the PF developed in Chapter 2 were applied through template analysis. Second, inductively emergent codes were generated through a subsequent thematic analysis pass, reflecting the abductive movement between theory and data that characterises the study's analytical logic. Together, this process produced a codebook of fifty-two codes across five analytical clusters, thirty-seven of which were derived deductively from the PF and fifteen of which emerged inductively from the data. The distribution of code frequencies across interviews is visualised through the Code Matrix Browser in Appendix D: and provides the empirical basis for the coding density patterns reported throughout this chapter. In addition, a word frequency analysis of the interview transcripts is provided in Appendix G, and further reflects the thematic priorities of the dataset, with sustainability, consumer, and taste ranking as the three most frequently occurring substantive terms across all six interviews. A cross-interview document comparison, visualised through the Document Comparison Diagram, is presented in Appendix H.

The following sub-sections present the key findings organised around these clusters, moving from observations about the shifting sustainability landscape to the firm-level strategic responses, consumer-facing dynamics, and forward-looking tensions.

4.1.1 Sustainability Tension

The first SRQ asked which competing sustainability demands and tensions are most salient for a sustainability-oriented firm. Drawing on Hahn et al. (2015) and Crane et al. (2014), the PF anticipated persistent, overlapping, and multidimensional tensions spanning ecological, social, commercial, and legitimacy domains. Critically, these tensions were expected to resist one-time resolution, requiring ongoing organisational navigation rather than strategic elimination. The empirical material both confirms and extends this expectation.

Before examining the specific tensions identified in the data, one overarching contextual finding warrants attention. Across all interviews, a consistent pattern emerges concerning the trajectory of sustainability as a strategic and communicative force: what the analysis codes as the normalisation of sustainability. During the interviews, a clear shift was described in the manner in which sustainability has moved from being a foregrounded, differentiating claim in corporate communication to an embedded baseline expectation. This expectation is present in operational practice, although it no longer commands the same communicative prominence it once did. This shift is attributed to a confluence of macroeconomic disruptions, most notably post-pandemic inflation and the economic consequences of the war in Ukraine, which redirected consumer and corporate attention toward more immediate material concerns. Crucially, interviewees were consistent in distinguishing this normalisation from a genuine erosion of sustainability values: attitudinal commitment to sustainability has remained broadly stable, while behavioural engagement and communicative intensity have declined. This normalisation pattern provides the essential backdrop against which the specific tensions, strategic responses, and consumer dynamics documented in the following sections are to be interpreted.

The sustainability tension cluster emerged as the most frequently coded thematic area across the interview dataset, with the sub-code “multi-dimensional sustainability pressure” accounting for more than 35 code applications. Participants consistently described sustainability as extending beyond environmental considerations alone and encompassing a broad range of interconnected ecological, social, nutritional, commercial, and geopolitical dimensions. One external expert summarised this perspective as follows:

“Sustainability is so much more than CO2 emissions. It is the cultural aspect, nutritional aspect, the environment and biodiversity. And the geopolitical situation is affecting the agenda of companies.” (Interview 2)

The data also revealed an emergent dimension not captured by the framework, which the analysis terms “intra-sustainability prioritisation”. This code emerged and is defined as the strategic necessity of ranking competing sustainability objectives when simultaneous optimisation across all dimensions is not feasible.

The tension between profitability and sustainability investment is the most frequently coded sub-category in the dataset, appearing prominently across all interviews. Interviewees converged on a shared understanding that sustainability initiatives generating direct cost savings through material reduction, energy efficiency, or supply chain optimisation face few internal obstacles, as they align commercial and sustainability objectives simultaneously. Friction intensifies when sustainability investment imposes net costs, demands long-term payback horizons, or requires trade-offs with product accessibility. The interviewee concludes with the following statement:

“The tension always there is money. Because in the end, someone needs to pay for your sustainability initiatives. And very often it costs more money than it generates value.” (Interview 2)

This structural dynamic is confirmed by an interviewee from the energy technology sector, who noted that sustainability initiatives without a realistic business case are often stopped, even if they are good for the environment, and that this dynamic constitutes a structural feature of corporate decision-making rather than an exceptional circumstance. The most quotable single formulation to emerge from the qualitative data captures what this analysis codes as financial constraint as sustainability moderator:

“You are as sustainable as you can afford. And that goes for individuals as well.” (Interview 1)

The convergence of these observations across four informants from different organisational positions indicates that financial considerations were consistently associated with sustainability-related decision-making at both the organisational and consumer level.

Interviewees repeatedly described financial capacity as influencing the extent to which sustainability initiatives could be pursued.

Across all interviews, legitimacy tension emerges as one of the most consistently documented sustainability challenges. The discrepancy between firms' claims and their practices, and the difficulty of maintaining credibility with multiple stakeholder groups, constitutes a dimension of sustainability tension. This tension is most vividly illustrated by the accounts of Oatly insiders, who described the difficulty of reconciling the company's historically vocal political and sustainability positioning with the commercial logic of entering certain markets. One interviewee candidly reflected on the difficulty of maintaining a coherent ethical framework when market entry decisions are made on a case-by-case basis without an overarching ethical strategy to provide consistency. Another interviewee reinforced this observation, noting that the same actions go unnoticed in companies with limited sustainability ambitions, but attract significant criticism when performed by companies whose brand is built on sustainability leadership. Those companies are monitored by consumers and media for any perceived inconsistency or failure (Interviewee 4).

An internal informant with direct exposure to European Union (EU) legislative processes described a situation in which expectations regarding corporate sustainability performance remained high despite a perceived weakening of broader institutional support for sustainability investment:

“The expectations on companies on doing good and doing better are all the same, very high. It's just that the industry is slowing down.” (Interview 6)

In addition, supply chain tensions formed a third distinct dimension. Interviewees highlighted the environmental footprint of product transportation as one of the most intractable sustainability challenges, given that geographical distribution is a non-negotiable commercial requirement. For companies like Oatly with a global market presence, the tension between the sustainability profile of the product itself and the emissions associated with distributing it at scale is described as a persistent and largely unresolvable gap, a tension that can be managed but not eliminated. This structural lock-in is confirmed with operational precision in Interview 6, who acknowledged without defensiveness that global distribution is constitutively necessary for the BM to function at scale:

“We have five factories and we are present on 60 markets. That's easy math to do that. We are transporting products globally.” (Interview 6)

The local sourcing strategy, namely the procurement of Swedish oats for the Swedish factory and the sourcing of locally sourced oats for the Dutch factory, is characterised as an explicit strategy that effectively manages this tension rather than eliminating it.

Separately, regulatory tensions are noted, particularly around the complexity of sustainability reporting frameworks, the inconsistency of government policy signals on packaging and taxation, and the competitive asymmetry created by the continued subsidisation of conventional dairy products relative to plant-based alternatives. The full analytical implications of this institutional reversal, including the political retrenchment around the conventional food system and the strategic uncertainty it generates for sustainability-oriented firms, are examined in Section 4.1.4.

A further sub-dimension of tension that emerged deductively from the framework through the template analysis stage concerns what is coded as the consumer belief versus operational reality gap. Across several interviews, respondents described a discrepancy between consumer perceptions of sustainability and the sustainability practices implemented within firms' operations. Interviewees suggested that consumers often have limited visibility into the complexity of sustainability investments across supply chains and production systems, while at the same time relying on simplified understandings of sustainability performance. One interviewee with extensive dairy industry experience summarised this perspective as follows:

“It's not the cow. It's the how.” (Interview 2)

The data further reveals an academic-practitioner sustainability gap: practitioners consistently articulate a richer and more holistic conception of sustainability than what is typically operationalised in corporate discourse. The sixth interview provides the most expansive illustration of this, describing a four-area sustainability definition encompassing climate, nature, people, and nutrition, and explicitly including public health, while noting that the external world may apply a narrower definition (Oatly, 2026).

The tensions documented above do not remain unaddressed. The analysis now turns to the strategic responses and organisational enabling conditions through which firms seek to navigate competing sustainability demands, examining both the deliberate reconfiguration of

communication and governance structures and the structural factors that determine whether such responses can be sustained over time.

4.1.2 Strategic BMI Responses & Organisational Enabling Conditions

The second SRQ asked how sustainability-oriented firms strategically respond to competing sustainability demands. The strategic responses documented in this section operationalise the mediating variable in the upper strand of the analytical framework. The most analytically significant strategic responses identified across the interview sample concern communication repositioning, organisational governance adaption, and the cultivation of organisational enabling conditions that determine whether such responses can be effectively sustained over time.

Across all three Oatly interviewees, a consistent and analytically precise account of communication repositioning has emerged. The firm has deliberately shifted from what informants described as aggressive or challenger brand sustainability messaging toward a strategy centred on penetration, quality, and embedded sustainability storytelling. One interviewee acknowledged that Oatly has deliberately stepped back from its formerly vocal sustainability communication, given that consumer receptiveness to such messaging has declined, while expressing confidence that this represents a temporary shift rather than a permanent one, as the underlying environmental problems continue to intensify (Interviewee 4). The most historically precise account of this repositioning is provided with an explicit before-and-after distinction:

“Before, when we did not have the tensions in sustainability, we won the fights only on sustainability credits. But now we need something more. Now we have the taste strategy to really convince people through the very best tasty products. We still have the sustainability credits intact. We have the nutrition credits intact.” (Interview 6)

This formulation captures the repositioning logic with the greatest analytical precision in the dataset. The taste strategy adds a new primary competitive dimension without replacing sustainability legitimacy, representing a strategic layering response to the consumer attention trough rather than a retreat from the sustainability mission.

This communication shift maps onto what this analysis codes as normalisation of sustainability, the trajectory through which sustainability moves from a foregrounded claim in the external

narrative to an embedded operational standard. The normalisation pattern is illustrated across six interviews spanning different organisations and sectors, making it one of the most robust cross-interview patterns in the qualitative dataset. An external expert with experience across multiple food companies described the structural shift in parallel terms:

“Now they go much more hand in hand than they did. It is not so much of a conflict of interest anymore because people can make money with sustainable solutions.” (Interview 5)

The data provided extensive empirical support for narrative management as a strategic BMI response. The most analytically precise account is provided by an informant who distinguished between two orientations toward communication:

“You have to be thoughtful. It is not like you can be vocal in one channel and think that will not travel to another channel in a second.” (Interview 1)

A further dimension of narrative management identified in Interview 6 concerns the handprint versus footprint framing, the deliberate reorientation of the sustainability accountability unit from the firm's own operational emissions to the systemic displacement effect of its products:

“Every sold litre of oat drink is one litre of milk that is not sold. So that has a positive handprint instead. It's just: where should the emissions come from, what part of the food system?” (Interview 6)

Interviewees also described the management of sustainability-related tensions as occurring largely on a case-by-case basis rather than through a formalised ethical decision-making framework. One informant explained:

“I know there is no strategy around it to handle all these kinds of tensions. It is rather a question of case-by-case handling. You probably should start at some sort of internal discussion about ethics - but we have not had that.” (Interview 1)

The capacity to implement these responses effectively is, however, contingent on a set of organisational enabling conditions that determine whether sustainability-oriented strategic responses can be sustained over time. The enabling conditions identified in this section are explicitly represented within the BMI response variable of the PF, alongside value proposition

and activity system reconfiguration. The interview data identifies three such conditions with consistency across the sample.

Ownership structure emerges as an underappreciated enabling condition, raised explicitly by one interviewee from a firm operating under long-term private family ownership. The argument advanced is that shareholder-driven governance imposes short-term financial pressures that systematically disadvantage sustainability investment:

“We can afford to be a bit more long term. I think this initiative would never have happened in a stock market company.” (Interview 5)

The governance architecture enabling proactive sustainability leadership extends beyond ownership structure to encompass the formal integration of public affairs into sustainability planning. A senior Oatly informant described a newly launched sustainability plan (Oatly, 2026) built around the concept of spheres of influence, extending accountability beyond the firm's direct operational control into policy advocacy, supply chain transformation, and public health:

“We have also a concept that is called spheres of influence. So there we look at how we can do our best to influence policy. And we have integrated our public affairs efforts into our sustainability plan - that is quite unique globally.” (Interview 6)

The concurrent launch of the climate solutions company certification, requiring that 90-95% of revenue derives from products with a demonstrably lower climate footprint than comparable alternatives, converts this expansive internal sustainability definition into an independently audited legitimacy claim. Taken together, the spheres of influence architecture and the climate solutions company certification operationalise what the analysis codes as Proactive Sustainability Leadership, the deliberate pursuit of sustainability ambition above and beyond regulatory compliance requirements. This code, which emerged deductively from the PF, is confirmed across all three Oatly interviewees and receives its most institutionally precise articulation in Interview 6, where the informant explicitly distinguished between what the firm must do and what it chooses to do:

“Our ambition is much higher than only what we have to do.” (Interview 6)

Beyond proactive leadership, organisational agility and sensing capabilities are identified as enabling conditions of growing importance in the current period of systemic uncertainty. Interviewees described how the speed and unpredictability of macroeconomic, geopolitical, and technological change have made long-term sustainability planning increasingly difficult to anchor in fixed targets. Sensing, the active scanning of market trends, generational shifts, and emerging technology, was accordingly described not merely as a useful complement to strategy but as a prerequisite for it. Firms that develop this capacity are better positioned to recognise when sustainability tensions are shifting in nature and to adjust their responses before those shifts become acute.

Finally, narrative consistency constitutes the third enabling condition and is analytically distinct from narrative management as a strategic response. Whereas narrative management concerns the active decisions firms make about how to communicate sustainability, narrative consistency concerns the structural prerequisite that those decisions be coherent across channels, geographies, and time. One interviewee reflected that Oatly's case-by-case approach to sensitive commercial decisions, in the absence of an explicit ethical strategy, had created precisely the kind of narrative inconsistency that undermines legitimacy, suggesting that Narrative consistency is not merely a communications consideration but a governance one. Together, these three enabling conditions, ownership structure, organisational agility, and narrative consistency, determine the degree to which the strategic responses documented above can be implemented effectively and sustained under conditions of systemic uncertainty.

Having examined how firms navigate sustainability tensions at the organisational level, the analysis now shifts to the demand side, examining the consumer dynamics and national market conditions that shape the commercial viability of those responses.

4.1.3 Consumer Dynamics & National Market Context

The PF draws on the TPB (Ajzen, 1991) and the food values hierarchy of Lusk and Briggeman (2009) to hypothesise that demand-side conditions are structured hierarchically. The hypothesis is that taste and price function as primary purchase drivers, with sustainability as a secondary consideration. The central mechanism preventing positive SA from translating into consistent PB is the attitude-behaviour gap.

The emergent markets and consumer cluster is the second most densely coded thematic area, with customer preferences and price generating the highest individual code frequencies. The findings in this cluster are directly relevant to the study's second research strand which positions demand-side conditions as the independent variable shaping consumer purchase behaviour

through the mediating mechanism of the attitude-behaviour gap. In addition, the qualitative baseline is outlined in more detail in Section 4.2.

Price sensitivity is the dominant consumer-level finding, with all six interviewees identifying affordability as the primary determinant of purchase decisions for plant-based and sustainability-positioned food products. This finding is expressed with force in relation to the post-inflationary environment, where consumers across socioeconomic segments have recalibrated their spending behaviour in ways that systematically disadvantage premium-priced products. As the interviewee concluded,

“people tend to like sustainable things and try new things, but it cannot cost [more].” (Interview 5)

A recurrent pattern across the interview data concerned a discrepancy between consumers stated sustainability concerns and their PB. Interviewees consistently observed that consumers often expressed positive attitudes towards sustainability while prioritising other considerations, such as Price, Taste, or Convenience, at the point of purchase. This pattern was described across multiple interviews as a recurring challenge for sustainability-oriented firms. One interviewee described this as the defining tension of the current consumer landscape, noting that the generation most vocal about sustainability is also the generation most likely to purchase based on price alone, a contradiction that can be explained not by hypocrisy but by the structural economic constraints that this cohort faces (Interview 4).

One of the most consistent emergent findings of the qualitative strand is consumer attention fatigue, an emergent code describing the structural displacement of sustainability as a purchase motivation by competing personal and societal concerns, without underlying values change. The phenomenon of consumer attention fatigue is analytically distinct from the attitude-behaviour gap, yet it constitutes one of its primary empirical mechanisms. Moreover, it provides a rationale for the existence of the gap and explains its persistence even among consumers who hold genuine sustainability values. This pattern is independently confirmed across all six coded interviews, with each informant providing a different mechanistic explanation that collectively constitutes one comprehensive explanation. The cognitive bandwidth mechanism is articulated earliest and most memorably:

“People have a hard time to keep two thoughts in their heads at the same time. It is just how it is.” (Interview 1)

In addition, one interviewee employed Maslow's needs hierarchy as a theoretical framework, contending that the preceding period of economic stability had enabled consumers to allocate their focus to external concerns such as sustainability. The subsequent inflationary shock, however, compelled a reallocation of resources towards more immediate material objectives. Nonetheless, this did not result in the abandonment of the underlying belief in the significance of sustainability.

Taste is consistently identified as the second non-negotiable consumer requirement, with interviewees expressing consensus that no level of sustainability credibility can compensate for an inferior sensory experience. The directness with which this is articulated in one interview is notable:

“Taste. Taste, taste.” (Interview 5)

This finding has been confirmed with analytical precision, demonstrating that taste is the primary driver of the global oat milk boom. Furthermore, the firm's communication strategy has been described as explicitly taste-centred:

“In the end it is taste and price. That is the global golden rule.” (Interview 6)

The same interviewee notes a temporal dimension to this hierarchy. Sustainability was a primary trend driver a decade ago but has since been displaced by functional attributes. This provides the most historically grounded single-sentence confirmation of consumer attention fatigue as a cyclical rather than linear phenomenon.

Beyond taste and price, health and convenience emerge as secondary but commercially significant purchase drivers, confirming the food values hierarchy of Lusk and Briggeman (2009). Health motivation is particularly salient in the post-inflationary environment: as one interviewee observed, the same product previously purchased for environmental reasons is now purchased for health reasons, suggesting health positioning provides a commercially durable alternative entry point (Interview 4). This is confirmed at the institutional level in Interview 6, which notes that health has overtaken sustainability as the dominant policy priority:

“Policy developments today are super centred around health and public health issues.” (Interview 6)

The firm's four-area sustainability definition, encompassing climate, nature, people, and nutrition, is not merely a philosophical choice but rather a strategic alignment with this evolving

policy landscape. Convenience constitutes a third structural enabler, with one informant describing the firm's core strategy as minimising switching friction:

“It's an easy shift that you don't even really notice because our products are easily interchangeable and taste good.” (Interview 6)

The concept of flexible identity consumption emerged inductively through the thematic analysis stage as a participant-driven framing which is not present in the theoretical framework. One interviewee described a shift in how consumers relate to their dietary identities, stating that earlier waves of plant-based adoption are driven by consumers who strongly identified as vegan or environmentally committed. However, more recent growth is characterised by flexitarian consumers who move fluidly between plant-based and conventional products without anchoring their Identity in either.

The institutional channel targeting strategy, which involves the strategic placement of plant-based products in settings where consumer choice is partially constrained, such as school canteens and workplace cafeterias, has been proposed as a complementary strategy for normalising plant-based consumption. Its strategic significance is grounded in two complementary accounts of how taste norms are formed and sustained. At the individual level, an informant described the thirty-year personal dairy consumption trajectory that makes switching behaviourally costly even for consumers with genuine sustainability values (Interview 4). At the institutional level, an Oatly informant traced this inertia to its structural origin:

“We have been exposed to the EU school milk programme since we were little kids. That programme is made to cement the taste norms in kids for life.” (Interview 6)

Together these two accounts reveal that taste norm inertia is simultaneously a product of public policy and personal biography. This observation reveals that the habit formation barrier documented across the dataset is not merely a natural consumer psychology phenomenon but the intended outcome of publicly funded institutional design operating for decades. Consequently, the targeting of institutional channels extends beyond conventional distribution logic, positioning plant-based alternatives within the same institutional contexts through which conventional dairy consumption norms have historically been reinforced.

Beyond the tensions and consumer dynamics that characterise the current landscape, interviewees consistently addressed the trajectory of sustainability pressure, identifying a set of emerging tensions expected to intensify in the coming years.

4.1.4 Emerging & Future Tensions

The PF situates all firm-level and consumer-level dynamics within a systemic uncertainty environment characterised by VUCA conditions. This final cluster examines the forward-looking dimension of that environment: the emerging tensions that interviewees anticipate will intensify the navigational challenge facing sustainability-oriented firms.

Geopolitical disruptions to global supply chains are identified as the single most significant emerging tension. Two interviewees independently cited fertiliser supply disruptions as an illustration of how geopolitical instability reshapes the parameters within which sustainability strategy must be formulated. Several interviewees noted that the concept of supply chain resilience, which involves sourcing closer to home and diversifying supplier bases, is rapidly becoming a strategic imperative that runs in partial tension with sustainability objectives. The reason for this is that shorter supply chains do not always produce better environmental outcomes. One interviewee described this as a condition in which firms must navigate not only the sustainability-profitability trade-off but also an emerging sustainability-resilience trade-off.

The regulatory dimension of the emerging tensions picture proved significantly more complex than the PF anticipated. Rather than a stable trajectory of tightening sustainability mandates, the data reveals a period of active institutional retreat at the EU level. Most concretely, the withdrawal of the EU's sustainable food systems framework, a policy pillar in which sector actors had heavily invested strategic compliance structures, illustrates this reversal. Interview 6 described a political shift toward protecting existing food system structures, with investments, subsidies, and political attention flowing toward the animal-intensive food system rather than sustainable transition. Explicitly acknowledging this disconnect, the same informant noted that the firm does not know how to argue against an institutional environment in which scientific evidence supporting plant-based dietary shifts is increasingly dominated by political considerations. Notably, this is the only moment in the dataset where a senior informant acknowledges a strategic challenge without a clear answer, and it constitutes the most institutionally grounded expression of systemic uncertainty in the qualitative material. The navigational challenge facing sustainability-oriented firms thus extends beyond managing

competing demands within a given institutional framework to operating within one that is actively moving against sustainable transition.

Regulatory intensification is anticipated by all interviewees as a certainty, with particular attention to water regulation, packaging sustainability requirements, and the continued evolution of EU sustainability reporting mandates. Several interviewees noted that the current regulatory environment already imposes significant compliance burdens, and that the trajectory of policy development points towards more rather than less stringent requirements.

The health dimension introduces an additional layer of complexity to the regulatory landscape. An informant has observed that health has overtaken sustainability as the prevailing policy priority. This suggests that regulatory developments are now more likely to favour health-oriented products over those focused-on sustainability. The firm's four-area sustainability definition, which formally incorporates nutrition and public health through the spheres-of-influence architecture, positions it to benefit from advancing health policy while maintaining its sustainability credentials. This alignment is the most explicitly institutionalised in the dataset.

Finally, interviewees converged on a vision of a future in which sustainability becomes truly invisible, embedded in operational and strategic practice so thoroughly that it no longer requires explicit external articulation. As one interviewee articulated,

“what you will see going forward is what you can already see in many other companies that are driving a very strong sustainability agenda - but you don't see it, you don't hear it. It just happens.” (Interview 1)

The AI usage policy outlined in Interview 6 offers the most concrete illustration of this invisible sustainability trajectory, whereby Sustainability is applied automatically to individual operational decisions without external visibility, regulatory requirement, or commercial motivation.

4.2 Quantitative Results

This section presents the findings from the quantitative strand of the study, which examined the demand-side conditions influencing PB for sustainability-oriented oat milk products across the German and Swedish markets through a structured online survey. Addressing SRQ3, the analysis explores how different consumer-related factors shape oat milk PB and evaluates the

relative importance of sustainability, price, health perceptions, taste, convenience, and brand-related considerations. All quantitative analyses reported in this chapter were conducted in R.

The section begins with an overview of the sample characteristics and descriptive statistics. Then, it examines the central consumer constructs and their relative importance within the sample. This is followed by the price sensitivity analysis, combining Van Westendorp price thresholds with willingness to pay findings to assess perceived acceptable price ranges across both markets. The subsequent regression analysis evaluates which constructs significantly predict oat milk purchase frequency. Finally, cross-national differences between German and Swedish respondents are examined across the key analytical dimensions.

4.2.1 Sample Characteristics

The final analytical sample comprised 168 valid responses following the application of two screening criteria. Respondents residing outside Sweden and Germany were automatically excluded through the survey branching procedure. Four respondents failed the embedded attention check item and were removed prior to analysis, resulting in a final sample of $n = 168$. Of the valid respondents, 123 (73.2%) were residents of Germany and 45 (26.8%) resided in Sweden. The unequal distribution between both national subsamples reflects differences in survey reach across the two markets and represents a limitation discussed further in Chapter 6.

The sample demonstrates a relatively youthful demographic profile, with a mean age of 28.0 years ($SD = 9.2$, range 19-65) and a median age of 25 years. This indicates a moderate overrepresentation of students and early-career individuals relative to the broader adult consumer population. Gender distribution consisted of 103 women (61.3%), 64 men (38.1%), and one respondent (0.6%) who preferred not to disclose their gender. Household income was distributed across three main brackets. A total of 79 respondents (47.0%) reported annual household income below 30,000 EUR / 325,000 SEK, 39 respondents (23.2%) reported income between 30,000 and 60,000 EUR / 325,000–650,000 SEK, and 39 respondents (23.2%) reported income above 60,000 EUR / 650,000 SEK. Eleven respondents (6.5%) preferred not to say.

Dietary profile distribution further highlights the heterogeneous composition of the sample. Overall, 93 respondents (55.4%) identified as omnivore, 40 respondents (23.8%) as flexitarian, 28 respondents (16.7%) as vegetarian, and 7 respondents (4.2%) as vegan. Consequently, flexitarian, vegetarian, and vegan respondents together represented 44.6% of the achieved sample. This distribution suggests that the dataset captures both mainstream consumers and respondents with stronger plant-based dietary orientations, reflecting the increasingly hybrid

consumption patterns characteristic of Northern European food markets. Table 2 presents the demographic breakdown across both national subsamples.

Metric	Germany	Sweden
Mean Age	28.1	27.7
Standard Deviation	9.4	8.6
Female	61.0%	62.2%
Male	38.2%	37.8%
Prefer not to say	0.8%	0%
Income < 30,000 EUR / 325,000 SEK	45.5%	51.1%
Income 30,000 - 60,000 EUR / 325,000 - 650,000 SEK	23.6%	22.2%
Income > 60,000 EUR / 650,000 SEK	24.4%	20.0%
Omnivore	49.6%	71.1%
Flexitarian	28.5%	11.1%
Vegetarian	17.1%	15.6%
Vegan	4.9%	2.2%

Table 2: Demographic Characteristics of the German and Swedish Subsamples.

Oat milk purchase frequency across the full sample was distributed across six ordinal categories. 35 respondents (20.8%) reported never purchasing oat milk, while 28 respondents (16.7%) purchased oat milk less than once a month. Twenty respondents (11.9%) reported purchasing oat milk about once a month, 21 respondents (12.5%) about twice a month, 42 respondents (25.0%) about once a week, and 22 respondents (13.1%) more than once a week. The overall mean purchase frequency score was 3.43 (SD = 1.77) on the six-point ordinal scale, corresponding approximately to the range between “about once a month” and “about twice a month”. This variable served as the primary dependent variable in the subsequent regression analysis presented in Section 4.2.5 and operationalises commercial viability at the consumer level within the analytical framework developed in Chapter 2.

Dairy milk purchase frequency provides an additional perspective on the consumption profile of the sample. Among the 168 valid respondents, 38 respondents (22.6%) reported never purchasing dairy milk. The remaining respondents reported varying degrees of regular dairy milk consumption, including 28 respondents (16.7%) purchasing dairy milk less than once a month, 18 respondents (10.7%) about once a month, 32 respondents (19.0%) about twice a month, 35 respondents (20.8%) about once a week, and 17 respondents (10.1%) more than once a week. The coexistence of regular dairy milk and oat milk PB across a substantial share of the

sample aligns closely with the strong presence of flexitarian consumption patterns identified within the dietary profile distribution. This suggests that oat milk consumption within the sample reflects fluid movement between plant-based and conventional dairy products rather than a categorical commitment to either category.

4.2.2 Descriptive Statistics and Construct Overview

Internal consistency was assessed for each multi-item construct using Cronbach's alpha, with 0.70 applied as the threshold for acceptable reliability (Nunnally, 1978). Composite construct scores were calculated as the mean of the corresponding survey items for all constructs included in the analysis.

SA demonstrated strong internal consistency across five items ($\alpha = 0.847$), with a sample mean of 4.14 (SD = 1.09). Therefore, the construct reflects moderately positive sustainability orientations within the sample, although sustainability considerations remained less strongly evaluated than more functional product-related dimensions.

Taste and sensory acceptability produced acceptable reliability levels ($\alpha = 0.746$) and one of the highest constructs means in the dataset (M = 5.68, SD = 0.98). Similarly, convenience demonstrated acceptable internal consistency ($\alpha = 0.788$) and emerged as the highest-rated construct overall (M = 5.87, SD = 0.98). These findings indicate that functional and experiential product characteristics represent central considerations in oat milk PB within the sample.

Brand trust also demonstrated acceptable reliability ($\alpha = 0.743$) and produced a moderately positive mean score (M = 4.65, SD = 1.01), suggesting relatively favourable perceptions of Oatly's credibility and sustainability positioning. In contrast, the health construct demonstrated comparatively limited internal consistency ($\alpha = 0.554$), falling below the commonly accepted reliability threshold. While the construct was retained for exploratory purposes, findings related to health perceptions should therefore be interpreted with caution. Table 3 summarises the reliability estimates and descriptive statistics for all examined constructs.

Construct	Items	α	Mean	SD	Interpretation
Sustainability Attitudes	5	0.847	4.14	1.09	Good reliability
Taste	5	0.746	5.68	0.98	Acceptable reliability
Convenience	3	0.788	5.87	0.98	Acceptable reliability
Brand Trust	5	0.743	4.65	1.01	Acceptable reliability
Health	3	0.554	4.39	1.15	Below recommended threshold

Table 3: Construct Reliability and Descriptive Statistics.

The overall construct pattern suggests that consumers within the sample placed greater emphasis on practical product characteristics such as convenience and taste than on broader sustainability-related considerations. At the same time, the comparatively positive evaluation of brand trust indicates that perceived authenticity and credibility remain relevant dimensions within sustainability-oriented food PB.

The pattern of correlations between sustainability attitude scores and dietary profile provides a criterion validity check consistent with theoretical expectations. Respondents identifying as vegan or vegetarian reported substantially higher sustainability attitude scores than omnivores, and higher declared income showed a modest positive association with willingness to pay a sustainability premium, both directionally consistent with the theoretical framework established in Section 2.6.

4.2.3 Purchasing Drivers

The descriptive analysis reveals noticeable differences across the examined consumer constructs. As illustrated in Figure 7, convenience emerged as the highest-rated construct with a mean score of 5.87, followed closely by taste with a mean of 5.68. These findings suggest that practical and experiential product characteristics play a central role in consumers' evaluations of oat milk products.

Brand trust showed a moderately positive evaluation with a mean score of 4.65. Health perceptions and SA received comparatively lower scores, with mean values of 4.39 and 4.14 respectively. While respondents generally expressed positive attitudes towards sustainability-related food consumption, the comparatively lower mean indicates that sustainability considerations alone may not be the dominant driver of PB within the sample.

The results therefore point towards a stronger importance of functional product characteristics such as convenience and taste compared to broader ethical or environmental considerations. At the same time, the relatively positive evaluation of brand trust suggests that perceived credibility and authenticity remain relevant within the oat milk category. The placement of environmental impact at the base of the importance hierarchy, with a rating lower than all functional and commercial attributes, provides direct empirical confirmation of the theoretical proposition that sustainability functions as a secondary rather than primary purchase driver in oat milk purchasing decisions.

These descriptive findings provide an initial indication of consumer priorities and form the basis for the subsequent inferential analyses examining which constructs significantly predict oat milk purchase frequency.

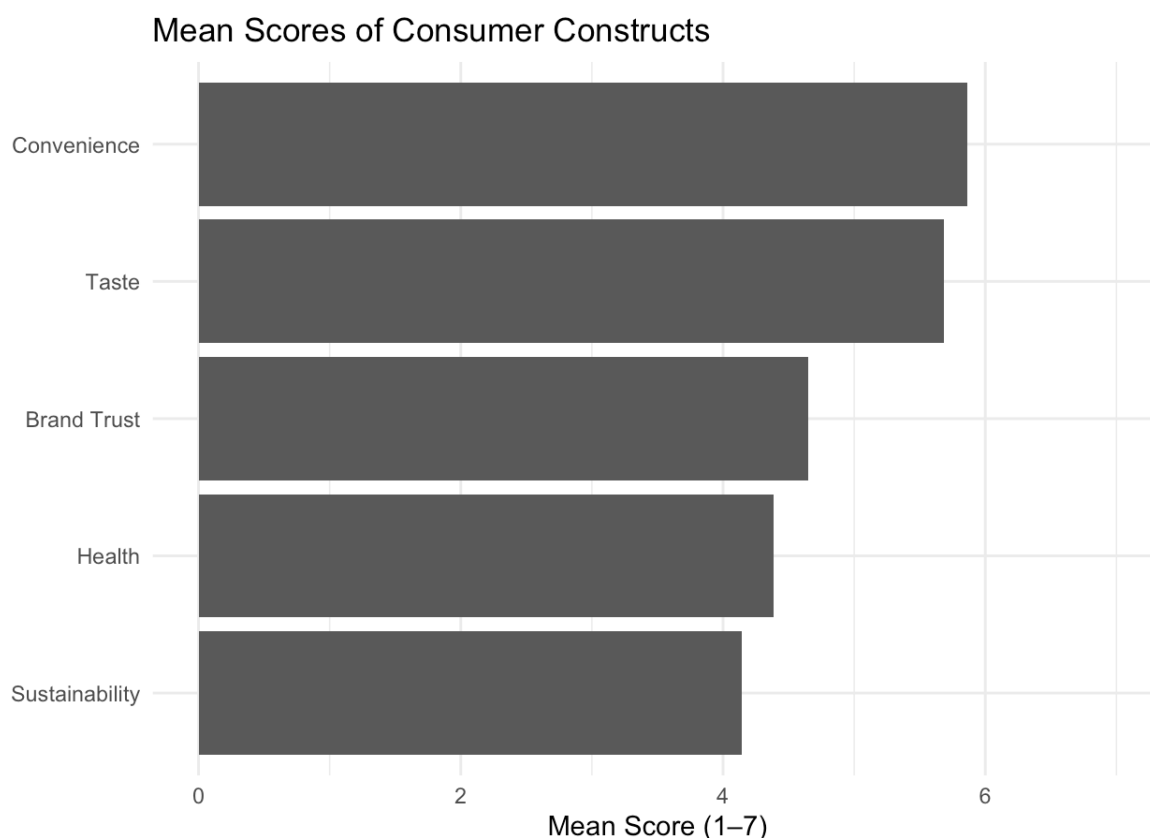


Figure 7: Mean Scores of Consumer Constructs on a Seven-Point Scale ($n = 168$).

The forced-choice single-item question, which asked respondents to identify the one factor most influencing their oat milk purchasing decision, reinforces this hierarchy with clarity. Taste was selected by 105 respondents (62.5%), making it by a substantial margin the most cited primary driver. Health was selected by 25 respondents (14.9%), price by 19 (11.3%), environmental impact by 12 (7.1%), convenience by 4 (2.4%), and brand trust by 3 (1.8%). The findings indicate that taste functions as a dominant behavioural purchase criterion rather than merely one attribute among several competing considerations.

The SA construct produced a moderate mean score of 4.14, positioning the sample above the scale midpoint but below strongly sustainability-oriented levels. Item-level variation was evident within the construct. Willingness to pay more for environmentally superior food was rated comparatively highly ($M = 4.60$), whereas sustainability as personal identity received substantially lower agreement ($M = 3.52$).

4.2.4 Price Sensitivity Analysis: Van PSM and Willingness to Pay Premium

Price sensitivity was examined through two complementary approaches. First, Van Westendorp's (1976) PSM was used to identify perceived acceptable price thresholds for oat milk across the Swedish and German samples. Second, a categorical willingness to pay premium item examined the extent to which respondents were willing to accept price premiums relative to conventional dairy milk.

The Van Westendorp analysis included all respondents who provided valid numerical entries across the four price threshold questions that satisfied the required ascending price order constraint (too cheap < bargain < expensive < too expensive). Swedish responses recorded in SEK were converted into EUR using the 11 SEK per EUR conversion rate provided within the survey instrument to ensure comparability across the two national samples. Figure 8 illustrates the median Van Westendorp thresholds for both markets.

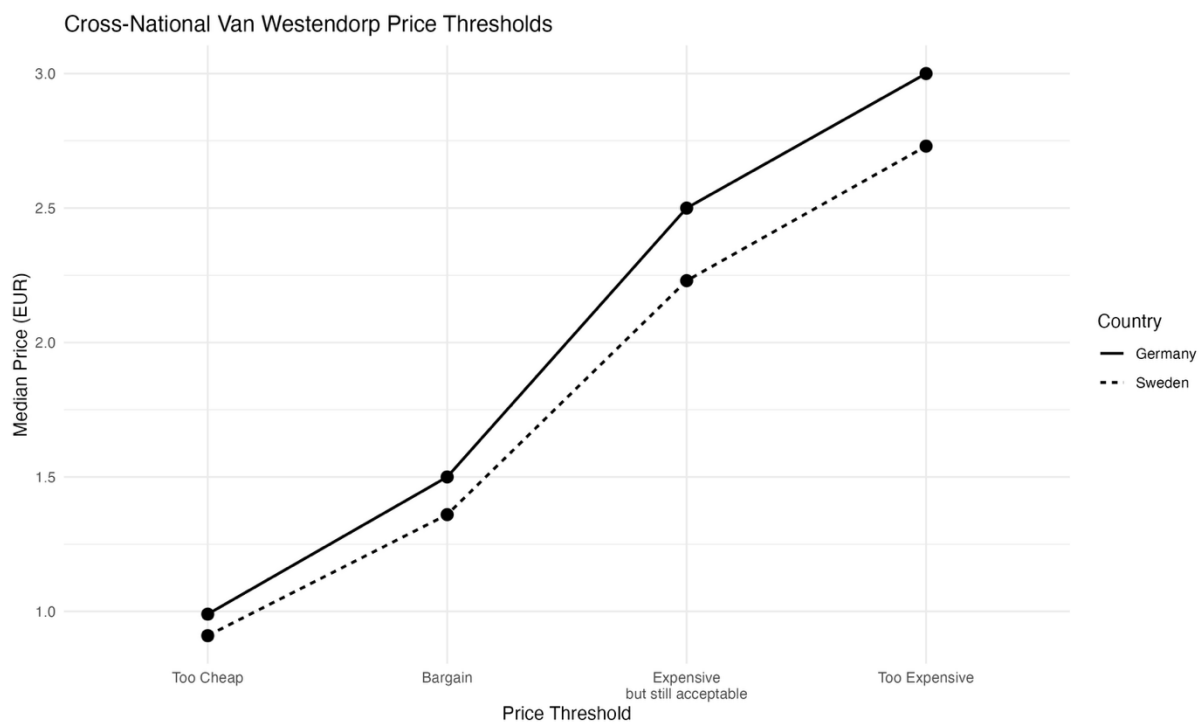


Figure 8: Median Price Thresholds by Country Based on the Van Westendorp PSM (EUR). Based on Van Westendorp (1976).

The results indicate broadly comparable but systematically higher price thresholds among German respondents across all four dimensions. German respondents reported a median “too cheap” threshold of EUR 0.99, compared to EUR 0.91 in Sweden. The corresponding “bargain” thresholds were EUR 1.50 in Germany and EUR 1.36 in Sweden. The “expensive but still acceptable” threshold reached EUR 2.50 among German respondents compared to EUR 2.23

among Swedish respondents, while the “too expensive” threshold was EUR 3.00 in Germany and EUR 2.73 in Sweden.

Threshold	Sweden (EUR equivalent)	Germany (EUR)	Difference
Too Cheap	0.91	0.99	+0.08
Bargain (Lower Bound)	1.36	1.50	+0.14
Expensive but Acceptable (Upper Bound)	2.23	2.50	+0.27
Too Expensive	2.73	3.00	+0.27
Acceptable Price Range	1.36 - 2.23 (15-25SEK)	1.50 - 2.50	-

Table 4: Median Price Thresholds by National Subsample Based on the Van Westendorp PSM (EUR).

The acceptable price range therefore spans approximately EUR 1.50 to EUR 2.50 in Germany and EUR 1.36 to EUR 2.23 in Sweden. In both markets, the current retail pricing of oat milk remains located within the acceptable range identified by respondents. The average retail price for oat milk in Germany was approximately EUR 1.52 per litre in 2024 (GFI Europe, 2025), positioning it within the lower portion of the acceptable range but closer to the bargain threshold than the expensive threshold. However, the consistently higher German thresholds suggest a somewhat greater normalization of oat milk price premiums within the German market context.

This pattern is analytically consistent with the broader findings of the study. German respondents not only reported slightly higher purchase frequency but also demonstrated systematically higher acceptable price thresholds across all four Van Westendorp dimensions. Taken together, these findings suggest that oat milk may be more strongly integrated into mainstream consumption patterns in Germany than in Sweden, despite the absence of substantial attitudinal differences between the two markets.

The willingness to pay premium item further reinforces this interpretation. While a minority of respondents indicated that they would only purchase oat milk at the same price as conventional dairy milk, most respondents reported at least some willingness to accept moderate sustainability-related price premiums. The largest share of respondents accepted premiums of up to 10% above conventional dairy milk prices, while progressively fewer respondents accepted larger premiums. This indicates that sustainability-related consumption is not necessarily constrained by the existence of a price premium itself, but rather by whether that premium remains within a range perceived as reasonable and normalized within everyday purchasing contexts.

4.2.5 Regression Analysis

A multiple linear regression analysis was conducted to examine which consumer-level factors predict oat milk purchase frequency. Oat milk purchase frequency served as the dependent variable, while SA, taste perceptions, convenience, brand trust, and health motivation were included as independent variables. Country was additionally included as a control variable to account for potential cross-national differences between Sweden and Germany.

Predictor	B	SE	P	Significant
Taste	0.441	0.167	0.009	**
Brand Trust	0.415	0.134	0.002	**
Sustainability Attitudes	0.281	0.121	0.021	*
Convenience	0.030	0.140	0.832	Not significant
Health	-0.066	0.114	0.563	Not significant
Country (Sweden)	-0.487	0.281	0.085	Not significant

Table 5: Multiple Regression - Predictors of Oat Milk Purchase Frequency.
*Note: $R^2 = .221$, $Adj. R^2 = .190$, $F(6,152) = 7.19$, $p < .001$. ** $p < .01$, * $p < .05$*

The overall regression model was statistically significant and explained approximately 22% of the variance in oat milk purchase frequency ($R^2 = .221$, adjusted $R^2 = .190$). This indicates a moderate level of explanatory power, which is considered acceptable for consumer behaviour research based on self-reported survey data. While the explained variance is moderate, it is consistent with the theoretical expectation that purchase frequency in a real-world product category is determined by many factors beyond the attitudinal constructs measured here, and the R^2 value compares favourably with comparable consumer behaviour studies in sustainable food contexts.

Three variables emerged as statistically significant positive predictors of oat milk purchase frequency. Taste showed a significant positive relationship with purchase frequency ($B = .441$, $p = .009$), indicating that respondents who evaluated oat milk more positively in terms of taste and sensory acceptability reported purchasing it more frequently. This finding reinforces the earlier descriptive results in Section 4.2.3, where taste emerged as the strongest individual purchase driver across the sample.

Brand trust produced the strongest positive effect in the model ($B = .415$, $p = .002$). Respondents who expressed higher trust in Oatly as a brand reported significantly higher purchase frequency. This suggests that PB is shaped not only by SA or functional product characteristics, but also by perceived brand credibility and trustworthiness.

SA also showed a significant positive relationship with purchase frequency ($B = .281, p = .021$). Respondents with stronger sustainability orientations reported purchasing oat milk more frequently, supporting the theoretical expectation that pro-environmental attitudes contribute to sustainable consumption behaviour. However, the comparatively stronger effects of taste and brand trust suggest that sustainability alone is insufficient to explain frequent PB. Instead, sustainability appears to operate alongside functional product experience and brand legitimacy rather than independently of them.

By contrast, convenience and health motivation did not emerge as significant predictors within the regression model. While both constructs produced relatively high mean scores in the descriptive analysis, neither explained meaningful variation in purchase frequency once the remaining variables were considered simultaneously. This suggests that convenience may function more as a baseline expectation than as a differentiating purchase driver, while health-related perceptions appear less central to repeated oat milk PB than commonly assumed in parts of the plant-based consumption literature.

The country variable showed a weak negative effect for Sweden relative to Germany ($B = -.487, p = .085$), indicating a directional tendency toward lower oat milk purchase frequency among Swedish respondents even after controlling for the attitudinal constructs included in the model. While this effect does not reach conventional significance levels, it is broadly consistent with the cross-national patterns identified in Section 4.2.6 and may reflect differences in market structure, retail penetration, or category normalisation between the two national contexts.

4.2.6 Cross-National Comparison: Sweden vs. Germany

To examine potential differences between the Swedish and German samples, independent samples Welch t-tests and Mann–Whitney U tests were conducted across the main attitudinal constructs and behavioural variables. In addition, Cohen's d effect sizes were calculated to assess the magnitude of observed differences between both national groups (see Table 6).

Overall, the results indicate that attitudinal profiles across the two markets remain broadly similar. Differences in SA, taste perceptions, convenience, health motivation, and brand trust were generally small and statistically weak. Effect sizes across these constructs ranged from negligible to small, suggesting that respondents in both countries evaluate oat milk in relatively comparable ways at the attitudinal level.

The clearest cross-national difference emerged in relation to actual oat milk purchase frequency. German respondents reported a higher average purchase frequency ($M = 3.59$) than Swedish

respondents ($M = 3.00$). The Welch t-test indicated a statistically significant difference between both groups ($p = .047$), while the Mann–Whitney U test remained marginally above conventional significance thresholds ($p = .070$). Cohen’s d indicated a small effect size ($d = .34$), suggesting a modest behavioural difference between the two national contexts.

Importantly, this behavioural divergence emerged despite the absence of major attitudinal differences between the two samples. German respondents did not report substantially stronger SA, taste evaluations, or health motivations than Swedish respondents. Instead, the findings suggest that behavioural differences may arise less from fundamentally different consumer beliefs and more from differences in market integration, purchasing routines, and the normalization of oat milk consumption within everyday retail environments. Figure 9 illustrates the higher average oat milk purchase frequency reported among German respondents relative to Swedish respondents.

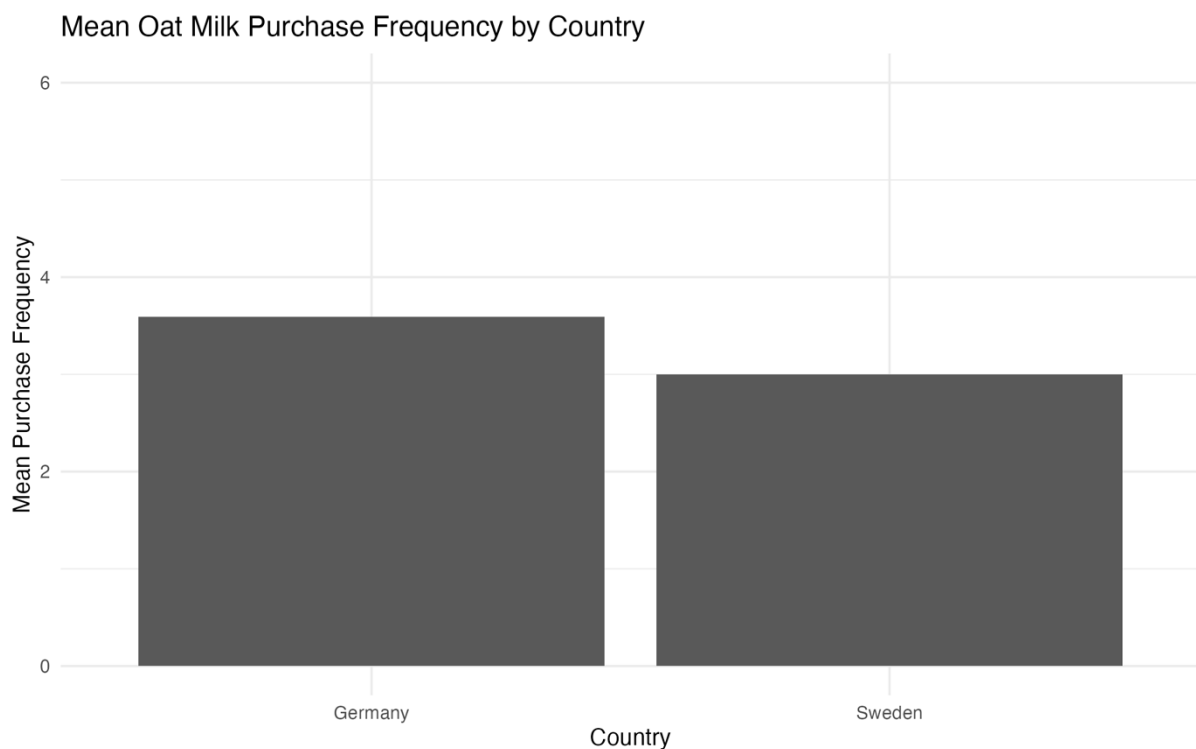


Figure 9: Mean Oat Milk Purchase Frequency by Country (Sweden $n = 45$, Germany $n = 123$).
Note: Purchase frequency measured on a six-point ordinal scale (1 = Never, 6 = More than once a week).
 Difference approaches but does not reach statistical significance ($t = -1.94$, $p = .047$, Cohen's $d = -0.34$).

This interpretation is broadly consistent with the findings of the Van Westendorp analysis presented in Section 4.2.4. German respondents reported systematically higher acceptable price thresholds across all four price sensitivity dimensions, indicating somewhat greater acceptance of sustainability-linked price premiums within the German market. Combined with the higher

reported purchase frequency, these findings suggest that oat milk may currently occupy a more normalized and behaviourally integrated position within the German consumer market despite Sweden's stronger international association with sustainability and plant-based innovation.

Taken together, the cross-national findings suggest relatively limited attitudinal differences between the two markets despite differing historical associations with sustainability and plant-based consumption. While German respondents reported marginally higher purchase frequency and price acceptance levels, effect sizes remained small and most differences did not reach statistical significance.

Construct	Sweden Mean (SD)	Germany Mean (SD)	t	p(t)	Mann– Whitney U	p(U)	Cohen's d
Sustainability Attitudes	3.96 (1.09)	4.21 (1.08)	-1.33	.189	2392	.179	0.23
Taste	5.61 (0.95)	5.71 (0.99)	-0.56	.576	2535	.405	0.10
Health	4.37 (1.05)	4.39 (1.19)	-0.11	.910	2666	.715	0.02
Convenience	5.90 (0.96)	5.85 (0.99)	0.25	.803	2835	.808	0.04
Brand Trust	4.52 (1.13)	4.71 (0.96)	-1.08	.282	2352	.415	0.19
Oat Milk Freq. (ordinal)	3.00 (1.65)	3.59 (1.79)	-1.94	.047	2270	.070	0.34

Table 6: Cross-National Comparison of Construct Means and Purchase Frequency (Sweden $n = 45$, Germany $n = 123$).

Note: t = independent samples t -test. U = Mann–Whitney U test. Cohen's d interpreted as negligible ($< .20$) or small ($.20$ – $.49$). All constructs measured on 7-point scales except Oat Milk Frequency (6-point ordinal scale).

4.3 Data Integration and Metainference

This section integrates the qualitative and quantitative findings through the joint display approach described in Section 3.5.3. The integration moves from strand-level evidence to a metainferential interpretation that addresses the central RQ and its constituent SRQ. The four analytical dimensions identified in Figure 5 are examined in turn, with qualitative and quantitative findings, and an integrated interpretation, structured according to three relational categories: convergence, where both strands support the same conclusion. Divergence, where findings differ or challenge theoretical expectations. Complementarity, where the strands address different dimensions of the same question in ways that together produce a more complete understanding. Section 4.3.2 draws on these overarching patterns to articulate what the integrated findings reveal about the strategic navigation of competing sustainability demands under conditions of systemic uncertainty (Creswell and Plano Clark, 2018).

4.3.1 Joint Display Analysis

	Qualitative Strand	Quantitative Strand	Integration Phase
	Qualitative Interviews	Quantitative Survey	Data Integration
Sustainability Tension	- Sustainability tensions confirmed as persistent and irresolvable across all six interviews - Financial capacity as structural ceiling on sustainability ambition at firm and consumer level - Legitimacy tensions intensified for citizen-activist brands - Intra-sustainability prioritisation identified inductively as sustainability-versus-sustainability tension - EU institutional regression introducing directional adversity rather than mere uncertainty	SA moderate ($M = 4.14$, $\alpha = 0.847$). SA emerged as the lowest rated of the examined consumer constructs and remained a statistically significant but comparatively weaker predictor of purchase frequency ($\beta = 0.297$, $p = .016$).	Convergence: Both strands indicate that sustainability remains important but is secondary to functional and commercial considerations in decision-making. Divergence: Qual. findings indicate a more complex institutional environment than initially anticipated, characterised by simultaneous increases in reporting requirements and weakening political support for sustainability transition. Complementarity: Qual. provides mechanism (EU framework withdrawal, political retrenchment) that explains why regulatory tension is qualitatively different from prior periods; quant. confirms consumer-level parallel through SA subordination to functional drivers.
BMI Response	- Taste-first strategic repositioning: sustainability credentials intact, taste as new primary competitive dimension - Spheres of influence governance architecture - Climate solutions company certification - Absence of ethical strategy as critical structural vulnerability	Taste strongest predictor ($\beta = 0.441$, $p = .009$). Brand Trust second strongest ($\beta = 0.415$, $p = .002$). SA significant but comparatively weaker ($\beta = 0.281$, $p = .021$).	Convergence: Firm-level repositioning toward taste and brand credibility is empirically validated by consumer data. The strategic pivot is supported by both qualitative and quantitative findings. Divergence: Interviewees described the management of ethical tensions as largely case-specific rather than guided by a formalised ethical framework. Complementarity: Quant. shows brand trust drives PB; qual. explains why governance-level investment builds the credibility that generates brand trust. The two strands close the explanatory loop.
Attitude-Behaviour Gap	Consumer attention fatigue as primary mechanism: cognitive bandwidth displacement and Maslow-mediated reallocation under inflationary pressure	SA significant ($\beta = 0.281$, $p = .021$) but weaker than taste ($\beta = 0.441$) and brand trust ($\beta = 0.415$). Health and convenience not significant. Price	Convergence: Both strands point toward price operating as a threshold condition rather than an active differentiator. The qual. strand documents price as a universal adoption barrier

	• Flexible identity consumption among the flexitarian majority • EU school milk programme as institutional driver of taste norm formation • Health overtaking sustainability as dominant policy priority	sensitivity functions as a behavioural threshold rather than a direct purchase frequency driver. PSM range: EUR 1.36–2.23 (Sweden), EUR 1.50–2.50 (Germany).	while the quant. strand shows price importance as non-significant once threshold conditions are met. Divergence: Contrary to expectations, convenience and price sensitivity did not emerge as significant predictors of purchase frequency, while brand trust displayed a comparatively strong association with PB. Convenience and price sensitivity did not emerge as significant predictors. Complementarity: Regression establishes the magnitude of the gap; qual. provides the explanatory architecture (fatigue, institutional design, identity fluidity) that regression cannot reveal.
Cross National Variation	• Health overtaking sustainability as dominant EU policy priority • EU school milk programme as institutional taste norm mechanism • Germany as most mature EU plant-based market • Sweden as home market with historically stronger sustainability culture • Both markets subject to the same EU institutional regression	Purchase frequency differences reached statistical significance in the parametric comparison ($p = .047$, $d = .34$), while the non-parametric comparison remained above the conventional significance threshold ($p = .070$), suggesting only modest evidence for a behavioural difference between the two national contexts.	Convergence: Both strands suggest that observed cross-national differences may be related to structural market conditions rather than attitudinal differences. Divergence: The qual. strand anticipated stronger sustainability-oriented consumption patterns in Sweden based on its established sustainability reputation and home-market status. However, the quant. results provide only modest evidence for behavioural differences in purchase frequency. Complementarity: Qual. findings provide potential explanations for the observed behavioural differences, including market maturity and differing consumption contexts.

Table 7: Joint Display of Qualitative and Quantitative Findings Across Four Analytical Dimensions. Based on Creswell and Plano Clark (2018).

The integration of empirical streams yields a highly convergent baseline regarding the commercial subordination of sustainability attributes. Across both empirical strands, the findings suggest that sustainability commitments at the firm and consumer level remain conditional upon economic realities and commercial viability. This pattern is reflected in the

quantitative regression, in which SA emerge as the weakest of the three significant predictors of purchase frequency.

The institutional environment dimension reveals a pattern of divergence between the PF's assumptions and the empirical material across both strands. The qualitative strand documents a dual dynamic in which administrative reporting requirements have expanded while strategic political support for systemic food transition has actively retreated at the EU level, a pattern characterised not merely by uncertainty but by directional inconsistency. The quantitative strand complements this picture through the subordination of SA to functional purchase drivers, suggesting that the institutional conditions documented at the firm level find a parallel in consumer behavioural patterns. Together, the two strands document an institutional environment characterised by directional inconsistency rather than stable background uncertainty.

In the domain of BM adaptation, convergence across both strands is strong. The qualitative strand documents a deliberate strategic pivot toward taste-first positioning, while the quantitative strand shows taste as the single most powerful predictor of purchase frequency, with the two strands independently pointing toward the same commercial logic. Complementarity is most analytically productive around brand trust. The quantitative strand establishes brand trust as the second strongest predictor of purchase frequency, while the qualitative strand provides the organisational mechanism that explains its origins through governance structures including the spheres-of-influence framework and climate solutions certification, which build organisational credibility that consumers subsequently process as a heuristic signal at the point of purchase. Neither strand could establish this connection independently.

The quantitative strand shows that price and convenience do not reach significance as predictors of purchase frequency, functioning as baseline conditions rather than active differentiators once threshold expectations are met. The qualitative strand complements this picture by providing the structural mechanism that explains why the attitude-behaviour gap persists despite positive sustainability orientations, tracing it to decades of institutionalised taste norm formation through mechanisms such as the EU school milk programme. Together the two strands indicate that the attitude-behaviour gap operates not solely at the level of individual psychology but is rooted in structural and institutional conditions that shaped consumer taste preferences over time.

4.3.2 Metainference Analysis

The joint display reveals three overarching patterns across the four analytical dimensions. Convergence is the prevailing relational type, with both strands independently confirming the subordination of sustainability to functional purchase drivers and the commercial validity of taste-first repositioning. Complementarity is most evident in the attitude-behaviour gap dimension, where the quantitative strand establishes the magnitude of the gap and the qualitative strand provides the explanatory mechanism that regression alone cannot reveal. Partial divergence emerges in two dimensions, namely the cross-national comparison, where the theoretical expectation of higher SA in Sweden is not confirmed, and the regulatory dimension, where the assumption of progressive linear tightening is directly contradicted by empirical evidence of EU institutional fragmentation and political retrenchment.

The tensions surrounding sustainability are both authentic and widespread, and their severity is increasing over time. Both strands point toward sustainability tensions as persistent and commercially significant features of the business environment. The qualitative strand documents financial constraint, legitimacy pressure, and institutional adversity as structurally enduring conditions, while the quantitative strand shows SA as significant but commercially subordinate to functional drivers.

Brand trust is the critical link between governance-level sustainability investment and commercial PB. The regression analysis identifies brand trust as a strong predictor of purchase frequency, only slightly below taste in magnitude ($B = 0.415$ vs. $B = 0.441$), and stronger than SA, health, and convenience. The qualitative strand provides the mechanism: the climate solutions company certification, the spheres of influence governance architecture, and sustained sustainability commitment through the consumer attention trough collectively build brand credibility that consumers process as a heuristic signal at the point of purchase. The qualitative strand thus provides the organisational mechanism that explains the brand trust effect established quantitatively, a connection that neither strand could produce in isolation.

Both strands reveal a consistent pattern across their respective analytical routes. The qualitative strand documents a strategic shift toward embedding sustainability structurally into governance and operations while foregrounding functional attributes such as taste and health in consumer-facing communication. The quantitative strand indicates that functional attributes dominate purchase decisions and that brand trust predicts purchase frequency more strongly than SA. The integrated interpretation of these patterns is developed in the discussion in Chapter 5.

5 Discussion

This chapter discusses the empirical findings presented in Chapter 4 in relation to the PF developed in Chapter 2 which is based on the broader theoretical literature. The discussion is structured around the three SRQ before addressing the central RQ and concluding with a set of refinements to the PF. Each section examines the extent to which the findings confirm, extend, or challenge the theoretical assumptions advanced in Chapter 2 and considers the implications for the BMI, paradox theory, and consumer behaviour literatures. The overarching aim is to move beyond empirical description toward theoretical contribution by articulating what the integrated findings reveal about how firms strategically navigate competing sustainability demands under conditions of systemic uncertainty.

5.1 Sustainability Tension: Confirming Paradox, Extending the Framework (SRQ1)

The first SRQ examined which competing sustainability demands and tensions are most salient for a sustainability-oriented firm. The PF, drawing primarily on Hahn et al. (2015) and Crane et al. (2014), anticipated persistent and multidimensional tensions spanning ecological, commercial, legitimacy-related, and operational domains. These tensions were conceptualised as structurally enduring rather than resolvable through singular strategic interventions. The findings strongly support this assumption while simultaneously extending the PF in several theoretically important ways.

The empirical material confirms the paradoxical character of sustainability-oriented business environments described within paradox theory. Sustainability tensions emerged not as isolated trade-offs but as interconnected pressures operating simultaneously across financial, supply chain, legitimacy, and organisational domains. In particular, the financial constraint tension illustrates the structural coexistence of sustainability ambition and economic limitation with clarity. The recurring observation that firms and consumers are only as sustainable as they can afford suggests that financial capacity functions as a structural sustainability constraint at both the organisational and consumer level simultaneously (Interview 1). This finding extends the paradox theory beyond the organisationally internal framing of Hahn et al. (2015), demonstrating that sustainability tensions are structurally embedded within broader economic conditions that simultaneously shape production and consumption behaviour. Two further extensions to the PF emerge from this observation.

A first refinement to the PF concerns the concept of intra-sustainability prioritisation. While Hahn et al. (2015) conceptualise sustainability tensions primarily as conflicts between commercial and sustainability objectives, the present findings suggest that sustainability-

oriented firms also face internal competition between sustainability objectives themselves. Therefore, sustainability-oriented firms navigate not only tensions between sustainability and profit, but also sustainability versus sustainability tensions, a distinction that has not yet been sufficiently theorised in the extant literature. The qualitative material further reveals an academic-practitioner sustainability gap, in which sustainability is understood more holistically in practice than it is typically operationalised in corporate discourse, illustrated by a four-area internal definition spanning climate, nature, people, and nutrition that extends well beyond the ecological framing dominant in the external literature.

A second extension concerns the legitimacy dimension. In contrast to the PF, which anticipated reputational risks when sustainability claims become contested, the findings reveal a more structurally asymmetric condition. Firms with strong sustainability reputations appear to face disproportionately severe consequences for perceived inconsistencies, reducing strategic flexibility once sustainability credibility has been established. This observation aligns with Crane et al. (2014), who argue that sustainability positioning generates escalating consistency requirements. However, the present findings extend this argument by suggesting that legitimacy asymmetry intensifies over time as sustainability-oriented firms become increasingly associated with elevated ethical expectations. This dynamic is particularly acute for what Koch (2020) terms citizen-activist brands, in which the firm's competitive identity is defined by sustainability and, as a result, its commercial decisions are subject to heightened scrutiny precisely because sustainability has become its constitutive logic. The absence of an ethical strategy, the most significant abductive finding of the qualitative strand, reveals a structural vulnerability that the existing literature does not adequately theorise. This finding suggests that even the most sustainability-committed firms navigate ethical tensions reactively rather than through principled governance structures.

A third extension concerns the institutional environment. Moving beyond the PF's assumption of a linear regulatory trajectory, the empirical data documents a condition of institutional adversity. A dual institutional pressure arises in which administrative reporting requirements continue to expand while broader political support for systemic food transition simultaneously weakens. The withdrawal of the EU sustainable food systems framework, which had already occurred prior to the data collection period and was documented through the interview material, illustrates this contradiction clearly. Rather than a progressively tightening sustainability mandate, the institutional environment increasingly confronts firms with contradictory strategic signals in which regulatory complexity grows while political commitment to sustainability transition retreats. The VUCA framework provides a partial theoretical basis for this

observation but does not capture the directional character of the reversal, as the empirical material reveals a shift that is averse rather than merely uncertain.

Finally, the findings reveal a consumer belief versus operational reality gap, referring to the discrepancy between consumer sustainability perceptions and the operational complexity of firm-level sustainability investment. As sustainability transitions from a differentiating claim to an embedded baseline expectation, commercial returns on sustainability investment become constrained not only by willingness to pay, but also by the communicative conditions under which sustainability efforts can be rendered visible. This challenge intensifies precisely as normalisation advances.

Collectively, the findings suggest that the tension landscape surrounding sustainability-oriented BMI is considerably more complex and adversarial than the PF initially anticipated. Institutional fragmentation, legitimacy asymmetry, communicative invisibility, and intra-sustainability prioritisation require greater theoretical attention within sustainability-oriented BMI research under conditions of systemic uncertainty (Hahn et al., 2015). SRQ1 can therefore be answered as follows: the most salient sustainability tensions for a sustainability-oriented firm are multidimensional, structurally persistent, and increasingly shaped by institutional adversity. These tensions operate simultaneously across the financial, legitimacy, supply chain, and intra-sustainability dimensions, and are mediated structurally by financial capacity as a ceiling on sustainability ambition.

5.2 BMI Responses and Strategic Layering (SRQ2)

The second SRQ examined how sustainability-oriented firms respond to competing sustainability demands through BMI. The PF, drawing on Teece et al. (1997) and Foss and Saebi (2017), anticipated that firms would deploy dynamic capabilities to translate sustainability tensions into deliberate changes to their value propositions, activity systems, BM reconfiguration and organisational structures. It further assumed that firms with deeply embedded sustainability identities would possess correspondingly explicit frameworks for navigating ethical trade-offs. The findings strongly support the dynamic capabilities framing while extending the PF in several theoretically important directions and revealing substantial divergence.

The most consistently documented strategic response across the qualitative strand is what this study terms strategic layering: the deliberate addition of a new primary competitive dimension without displacing the existing sustainability positioning. Oatly's repositioning toward taste-first communication while maintaining sustainability commitments intact exemplifies this

logic. Rather than retreating from sustainability under conditions of consumer attention fatigue and increasing market normalisation, the firm added taste as a parallel legitimacy claim while preserving sustainability as a foundational but no longer foregrounded attribute. This finding extends the BMI literature by demonstrating that sustainability-oriented value proposition reconfiguration does not necessarily involve replacing sustainability positioning with commercially stronger attributes. Instead, sustainability may become operationally embedded while functional attributes are foregrounded within consumer-facing communication. Under conditions of sustainability normalisation, additive repositioning may therefore represent a more commercially viable and legitimacy-preserving response than either sustainability amplification or strategic retreat from sustainability positioning altogether.

Closely related to this repositioning logic is the deliberate reconfiguration of how sustainability is framed rather than merely what is delivered operationally. The qualitative strand documents a fundamental reframing of sustainability accountability, in which the firm repositions itself not as a source of emissions to be minimised but as a systemic displacement mechanism that reduces overall emissions by substituting conventional dairy products. Rather than merely embedding sustainability within the value proposition as anticipated by Boons and Lüdeke-Freund (2013), this approach redefines the unit of sustainability accountability from the firm's own operational emissions to the systemic displacement effect of its products. This extends narrative management from communication framing into sustainability accounting logic itself, and in doing so expands the sustainable BMI typology of Bocken et al. (2014) beyond the boundaries of product and activity system reconfiguration.

Sustainability normalisation, documented across all six interviews, reflects a broader structural shift in the competitive environment rather than a firm-specific adjustment. As plant-based consumption becomes increasingly mainstream, sustainability appears to function less as a differentiating market position and more as an expected baseline condition. This observation extends Bocken et al.'s (2014) sustainable BM archetypes by suggesting that sustainability normalisation operates not as a static configuration but as a dynamic adaptive process through which sustainability-oriented firms continuously recalibrate the visibility and communicative role of sustainability within their BM.

A further and analytically distinct extension concerns governance-level BMI. The PF conceptualised BMI responses primarily at the level of the value proposition and activity system. The empirical material reveals an additional and analytically distinct level of

reconfiguration, namely the governance architecture through which sustainability commitments are institutionalised, monitored, and communicated. Oatly's spheres of influence framework, which extends responsibility beyond operational control into policy advocacy, supply chain transformation, and public health engagement, illustrates this development particularly clearly. The concurrent climate solutions company certification, with its 90-95% revenue requirement, further institutionalises this commitment through external audit and verification mechanisms, addressing the consistency and credibility challenge identified by Crane et al. (2014) through governance-level rather than communication-level mechanisms. Together, these elements represent a form of governance innovation not explicitly captured within existing BMI typologies.

The findings therefore suggest that BMI under conditions of systemic uncertainty increasingly involves reconfiguring not only what firms offer and how products are produced, but also the institutional architecture through which sustainability ambition is rendered credible, verifiable, and organisationally durable. Governance-level sustainability architecture consequently emerges not merely as a supporting mechanism for BMI, but as an increasingly central component of sustainability-oriented competitive positioning itself. Geissdoerfer et al. (2018) argue that the most consequential sustainable BMI contributes to systemic change rather than merely firm-level advantage. The spheres of influence architecture operationalise this ambition, translating the citizen-activist positioning described by Koch (2020) into a governance structure with explicit policy advocacy as a strategic objective.

The most significant divergence from theoretical expectation concerns the absence of formalised ethical strategy. The PF assumed that firms with deeply embedded sustainability identities would possess correspondingly explicit ethical decision-making structures for navigating tensions and trade-offs. The empirical material challenges this assumption. Even within Oatly, a firm whose entire BM is fundamentally sustainability-oriented, strategic decisions involving ethical tensions were largely navigated on a case-by-case basis without a formalised ethical governance architecture (Interview 1). This finding reveals a gap within existing BMI research, which has extensively theorised how sustainability-oriented firms reconfigure value propositions and operational systems but has devoted comparatively limited attention to the absence of explicit ethical decision structures as a potential organisational vulnerability. The findings therefore suggest that sustainability commitment and ethical strategic architecture represent empirically separable organisational conditions rather than automatically corresponding organisational capabilities.

The empirical material further identifies three enabling conditions that shape whether BMI responses can be sustained under conditions of systemic uncertainty: ownership structure, organisational agility, and narrative consistency. These conditions function less as strategic responses themselves than as structural preconditions that determine the stability and adaptability of sustainability-oriented BMI over time. Ownership structure, particularly long-term private ownership, appears to moderate the firm's ability to sustain sustainability investment under commercial pressure, consistent with the ambidexterity logic of O'Reilly and Tushman (2008), in which long-term structural separation of exploitative and explorative activities enables firms to pursue transformation without undermining commercial foundations. Organisational agility operationalises the sensing dimension of dynamic capabilities theory through the capacity to recognise and respond to shifting sustainability expectations before tensions become strategically acute and reflects the absorptive capacity conditions identified by Cohen and Levinthal (1990) as prerequisites for translating external sustainability knowledge into coherent strategic responses. Narrative consistency emerged as particularly important given the legitimacy asymmetry identified in Section 5.1, requiring sustainability communication to remain coherent across markets, organisational levels, and time horizons.

Finally, the integration of qualitative and quantitative findings helps explain the role of brand trust. While the regression analysis identified brand trust as the second strongest predictor of oat milk purchase frequency, the qualitative findings suggest that this effect is rooted in governance-level sustainability investments such as spheres of influence architectures and external certification mechanisms. These mechanisms appear to strengthen organisational credibility, which consumers then process as a trust signal at the point of purchase. SRQ2 can be answered as follows: sustainability-oriented firms respond to competing demands through strategic layering at the value proposition level, governance architecture innovation at the institutional level, and narrative management at the accountability level. Brand trust emerges as the commercially measurable dividend of governance-level sustainability investment providing the demand-side validation mechanism through which firm-level BMI translates into the commercial viability outcome posited in the PF.

5.3 Consumer Purchasing Drivers (SRQ3)

The third SRQ examined which consumer factors drive purchasing decisions for a sustainability-oriented firm. The PF drew on the TPB (Ajzen, 1991) and the food values hierarchy proposed by Lusk and Briggeman (2009) to suggest that demand-side conditions are structured hierarchically, with taste and price functioning as primary purchase drivers and

sustainability operating as a secondary consideration. The attitude-behaviour gap was positioned as the central mediating mechanism preventing positive sustainability orientations from translating into consistent PB. Both propositions receive strong empirical support, while the framework requires extension in several directions not originally anticipated.

Across both empirical strands, taste emerged as the dominant purchase driver and sustainability as a structurally subordinate consideration, consistent with the food values hierarchy proposed by Lusk and Briggeman (2009). The health construct demonstrated limited internal consistency and is therefore excluded from strong inferential claims. The consistency of this pattern confirms the food values hierarchy as a robust organising principle for sustainability-oriented food PB, extending its applicability to a cross-national plant-based food context.

The most theoretically consequential finding concerns the conditional character of sustainable consumption. While the regression results demonstrate a positive association between SA and purchase frequency, these attitudes remain substantially weaker predictors than taste and brand trust. Consequently, this finding suggests that sustainable consumption appears to remain conditional upon functional product performance rather than being driven primarily by environmental concern itself. Sustainability therefore functions less as an independent purchase motivation and more as a legitimating attribute that becomes commercially effective only when embedded within a product experience capable of satisfying primary functional expectations. This represents an important qualification of the attitude-behaviour relationship as conceptualised within the TPB, which positions attitudinal strength as a primary determinant of behavioural intention without fully accounting for the hierarchical structure of product evaluation within which SA operate. This qualification is consistent with Kollmuss and Agyeman's (2002) characterisation of the attitude-behaviour gap as a structural feature rather than a measurement artefact, as even when sustainability attitudes predict behaviour, they do so less strongly than functional and heuristic cues. A related and equally significant extension concerns the role of brand trust. The regression analysis identified brand trust as the second strongest predictor of oat milk purchase frequency, outperforming SA, health motivation, and convenience. Theoretically, this finding is important because brand trust does not explicitly feature within the TPB's three-component structure of attitudes, subjective norms, and perceived behavioural control. Its predictive strength suggests that heuristic and identity-based evaluative mechanisms operate alongside, and in this category at times more strongly than, the deliberative attitude-to-intention pathway emphasised within the TPB framework, consistent with Petty and Cacioppo's (1986) Elaboration Likelihood Model, which predicts that peripheral

route processing dominates in everyday consumption contexts where cognitive effort is limited. Considered together with the primacy of taste, the findings suggest that sustainable consumption depends not solely on pro-environmental attitudes, but on the successful integration of sustainability into trusted, pleasurable, and mainstream consumer experiences.

A further extension concerns the role of convenience and price sensitivity. Both constructs produced comparatively high descriptive means, yet neither emerged as a statistically significant predictor of purchase frequency within the regression model. This pattern is consistent with a threshold interpretation in which convenience and acceptable pricing function as necessary baseline conditions for purchase rather than as active differentiators of repeat PB once those conditions are satisfied. This finding qualifies the PF's positioning of perceived behavioural control as a direct predictor of sustainable PB and instead suggests that accessibility and affordability operate as structural threshold conditions within the category.

The Van Westendorp results reinforce this threshold interpretation. Current retail prices in both markets fall within the acceptable range, suggesting that price as a structural barrier is already largely neutralised. The commercial opportunity therefore lies in strengthening the functional and brand attributes that drive purchase frequency within the existing price range, rather than in further price reduction.

The qualitative strand further extends the framework's account of the attitude-behaviour gap through two mechanisms not explicitly anticipated within the PF. The first mechanism concerns consumer attention fatigue, referring to the displacement of sustainability as a purchasing priority by competing personal and societal concerns under conditions of inflationary and economic pressure without requiring a corresponding decline in underlying sustainability values. As one interviewee framed it through Maslow's (1943) hierarchy of needs, the inflationary shock compelled a reallocation of consumer attention toward more immediate material objectives without abandoning underlying sustainability values. This finding extends the attitude-behaviour gap literature documented by Kollmuss and Agyeman (2002) by situating the gap not solely within individual psychology but within broader macroeconomic conditions that shape consumer attention and behavioural prioritisation. The second mechanism concerns flexible identity consumption, challenging the PF's implicit assumption that sustainability-oriented consumers constitute a stable and identity-committed segment. Instead, the findings suggest that the commercially most significant consumer segment operates through flexible and situational purchasing logics rather than through categorical lifestyle commitment.

The quantitative evidence of regular co-occurrence between dairy milk and oat milk purchasing confirms the fluid rather than categorical character of mainstream plant-based consumption. More fundamentally, the institutional grounding of the taste norm barrier in the EU school milk programme reveals that the attitude-behaviour gap is not solely a psychological phenomenon but the intended outcome of publicly funded institutional design operating over decades, a structural dimension of consumer behaviour that communication-led sustainability strategies cannot easily overcome (Interview 6).

The cross-national comparison introduces a final and theoretically important refinement. The theoretical expectation derived from Thøgersen (2011) and Grunert et al. (2014), that Swedish respondents would demonstrate higher SA and stronger attitude-behaviour translation given Sweden's more institutionalised sustainability norms, is not confirmed by the data. A comparative analysis indicates limited evidence of cross-national variation in the frequency of oat milk purchases, with German respondents reporting somewhat higher purchase frequency overall. Attitudinal constructs remained largely comparable across both contexts. Although attitudinal profiles remained largely comparable across both markets, higher reported purchase frequency among German respondents suggests that PB is shaped not only by sustainability beliefs but also by structural conditions such as market maturity, retail penetration, and category normalisation. These conditions are acknowledged by Thøgersen (2011) and Grunert et al. (2014) as important contextual influences but are not fully theorised as independent drivers of purchasing frequency. Furthermore, the findings qualify the TPB's emphasis on attitude as the primary behavioural determinant and support the interpretation that the commercial viability of sustainability-oriented products depends on both favourable consumer attitudes and the extent to which sustainable products become structurally integrated into mainstream consumption contexts.

Taken together, the findings suggest that the commercial viability of sustainability-oriented BMs depends less on the absolute strength of consumer SA than on the successful functional integration of sustainability into trusted, pleasurable, and routinised consumption experiences. This represents a theoretically significant extension of the TPB and the food values hierarchy by suggesting that attitude-based models of sustainable consumption may require supplementation through heuristic, structural, and market normalisation dimensions to more adequately explain the behavioural conditions under which sustainability-oriented value propositions achieve mainstream commercial viability. SRQ3 can be answered as follows: the primary consumer factors driving purchasing decisions are taste and brand trust, with SA

operating as a significant but structurally subordinate predictor. This confirms that sustainable consumption remains conditional upon functional product performance and brand credibility rather than being driven primarily by environmental concern itself.

5.4 Strategic Navigation Under Systemic Uncertainty (RQ)

The integrated findings suggest that strategic navigation under conditions of systemic uncertainty does not follow a linear logic in which tensions are identified, resolved, and subsequently stabilised through strategic intervention. Rather, the tensions surrounding sustainability-oriented BMs appear to constitute enduring structural conditions that intensify, evolve, and reconfigure over time. Firms do not solve sustainability tensions in any permanent sense, but instead continuously navigate shifting combinations of commercial, legitimacy-related, institutional, and consumer-level pressures. The PF's positioning of systemic uncertainty as the overarching environmental condition surrounding sustainability-oriented BMI is therefore strongly supported. However, the empirical findings indicate that the character of this uncertainty requires important refinement.

Within this context of enduring navigational complexity, commercial viability emerges as a critical boundary condition across both empirical strands. At the firm level, financial constraints influence the extent to which sustainability investments can be pursued and maintained over time. At the consumer level, PB determines whether sustainability-oriented value propositions achieve sufficient market acceptance to remain economically viable. Therefore, commercial viability appears as a structural condition that determines the extent to which sustainability ambitions can be realised and sustained.

The conditions shaping this boundary constraint extend beyond market volatility and regulatory unpredictability into two analytically distinct dimensions of systemic uncertainty. The first is institutional adversity, referring to the increasingly fragmented and directionally inconsistent environment within which sustainability-oriented firms operate. Rather than providing progressively coherent transition conditions, the institutional environment increasingly confronts sustainability-oriented firms with contradictory strategic signals. The second dimension concerns communicative uncertainty. The findings indicate that sustainability investments do not automatically translate into commercial legitimacy because consumers operate under conditions of attention fatigue, inflationary pressure, and functional prioritisation that constrain the visibility and behavioural influence of sustainability communication. Sustainability-oriented firms navigate uncertainty concerning the extent to which sustainability commitments can be rendered commercially meaningful within mainstream consumer contexts.

Within this environment, the findings identify a coherent navigational logic operating across three interconnected organisational levels. At the value proposition level, strategic layering enables firms to maintain sustainability as an organisational foundation while foregrounding functional attributes in consumer-facing communication, extending Bocken et al.'s (2014) static BM archetypes by demonstrating that sustainability positioning is not fixed but continuously recalibrated as market conditions evolve.

At the governance level, the institutionalisation of sustainability commitments into formal architecture generates externally verifiable credibility, addressing the legitimacy asymmetry identified in Section 5.1 through governance-level rather than communication-level mechanisms, consistent with Crane et al. (2014).

At the enabling conditions level, long-term ownership structures, organisational agility, and narrative consistency function as structural preconditions that determine whether sustainability-oriented BMI can be sustained over time, operationalising the ambidexterity logic of O'Reilly and Tushman (2008) and the absorptive capacity conditions of Cohen and Levinthal (1990) at the organisational level.

Integration of the qualitative and quantitative findings indicates an interconnectedness of these three navigational levels through the mechanism of brand trust. Governance-level sustainability architecture builds organisational credibility, which consumers subsequently process as a heuristic signal at the point of purchase. The regression findings demonstrate that brand trust predicts oat milk purchase frequency more strongly than SA themselves, while the qualitative strand explains the organisational mechanisms through which such trust is generated. This leads to the suggestion that sustainability investment alone is insufficient to secure commercial viability unless translated into forms of organisational credibility that consumers perceive as trustworthy and behaviourally relevant. Sustainability commitments may consequently be organisationally substantive while remaining commercially underperforming if they are not successfully integrated into consumer-relevant evaluative mechanisms.

The integrated findings across all three SRQ converge on the following answer for the central RQ: sustainability-oriented firms navigate competing demands by maintaining sustainability as a constitutive operational and governance standard while continuously repositioning its commercial expression away from explicit sustainability claims toward functional attributes, brand credibility, and structural invisibility. Navigation is not a singular strategic act but an ongoing organisational process that operates simultaneously at the value proposition level through strategic layering, at the governance level through institutional architecture innovation,

and at the enabling conditions level through ownership structure, agility, and narrative consistency. The commercial viability of this navigational logic depends on embedding sustainability so thoroughly into trusted and pleasurable product experiences that it no longer requires explicit communication to generate commercial returns.

A critical qualification to this integrated answer is that the absence of formalised ethical governance represents a significant navigational vulnerability. Firms facing intensified legitimacy expectations, institutional adversity, and increasing public scrutiny may become increasingly exposed when ethical tensions are managed reactively on a case-by-case basis rather than through explicit ethical governance structures. Strategic navigation under systemic uncertainty therefore appears to require not only operational adaptability and governance credibility, but also organisational mechanisms capable of stabilising ethical decision-making under conditions of persistent tension and heightened scrutiny.

Taken together, the findings also indicate that invisible sustainability may represent the strategic direction most consistent with the conditions identified across both empirical strands. As sustainability becomes increasingly normalised, consumer attention becomes fragmented, and institutional conditions become more adverse, sustainability-oriented firms appear to derive greater strategic value from embedding sustainability within products, governance systems, and organisational routines than from foregrounding it rhetorically. The quantitative findings demonstrate that taste and brand trust exert substantially stronger behavioural influence than explicit SA, while the qualitative findings indicate that sustainability-oriented firms increasingly seek to minimise behavioural friction rather than amplify sustainability messaging itself. Effective strategic navigation therefore appears to depend upon making sustainability structurally undeniable rather than communicatively dominant. Under conditions of institutional adversity, communicative uncertainty, financial constraint, and consumer attention fatigue, firms that successfully operationalise this navigational logic appear better positioned to sustain both commercial viability and long-term sustainability commitment simultaneously.

5.5 Refinements to the Preliminary Framework

The empirical findings presented across sections 5.1 through 5.4 broadly confirm the overall architecture of the PF while necessitating several refinements, as visualised in the revised framework (Figure 10). The revised framework introduces three primary refinements. First, the sustainability tension landscape is expanded through intra-sustainability prioritisation, legitimacy asymmetry, financial capacity, and institutional adversity, as developed in Section 5.1. Second, the BMI response dimension is extended through governance-level BMI and the

ethical governance gap, as developed in Section 5.2. Third, the consumer strand is refined through the inclusion of brand trust, threshold conditions, and structural market influences, as developed in Section 5.3. Bold entries in the figure denote empirical additions to the original framework.

Systemic uncertainty requires expansion through two empirically grounded dimensions visible in the revised framework header. Institutional adversity captures the directionally contradictory institutional environment in which regulatory complexity and political commitment to sustainability transition move simultaneously in opposing directions. Communicative uncertainty captures the constrained ability of sustainability investments to translate automatically into commercial legitimacy under conditions of attention fatigue and functional consumer prioritisation.

Overall, these refinements suggest that the PF underestimated both the adversarial character of the institutional environment and the structural conditions that prevent sustainability investment from translating automatically into commercial legitimacy and PB. The refinements collectively converge on a broader insight. Sustainability-oriented firms derive greater strategic value from embedding sustainability structurally than from foregrounding it rhetorically.

The revised framework positions invisible sustainability as the navigational direction most consistent with the conditions identified across both empirical strands. Invisible sustainability is understood as the structural embedding of sustainability commitments into product design, governance architecture, and operational practice without rhetorical foregrounding. Rather than representing a communication strategy, it emerges as a broader organisational response to systemic uncertainty, allowing firms to maintain sustainability commitments while simultaneously preserving commercial viability and consumer relevance.

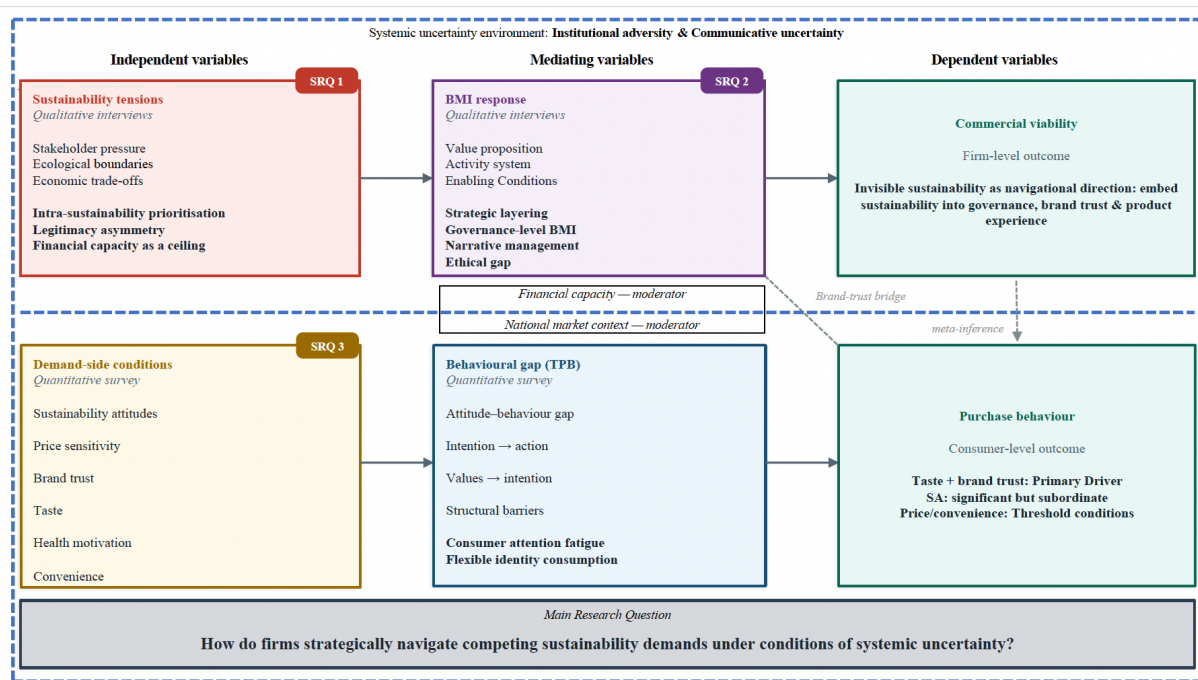


Figure 10: Revised Preliminary Analytical Framework.

6 Conclusion

This chapter synthesises the central contributions of the study and situates them within the broader context of sustainability-oriented strategy research. Building on the integrated findings presented in Chapters 4 and 5, the chapter outlines the study's theoretical contributions to the BMI, paradox theory, and consumer behaviour literatures before discussing the practical implications for firms navigating competing sustainability demands under conditions of systemic uncertainty. The chapter then considers the broader generalizability of the findings and concludes by reflecting on the study's limitations and identifying avenues for future research.

This research was guided by the following RQ:

How do firms strategically navigate competing sustainability demands under conditions of systemic uncertainty?

Through a convergent mixed methods design, centred on Oatly AB, this question was examined from both the firm perspective, drawing on six semi-structured expert interviews, and the consumer perspective, drawing on a quantitative survey administered across Sweden and Germany. The findings demonstrate that strategic navigation under conditions of systemic uncertainty does not follow a linear logic of tension resolution but constitutes an ongoing organisational process operating simultaneously at the value proposition, governance, and enabling conditions levels. Commercial viability emerges not as a function of sustainability communication intensity, but of the successful structural integration of sustainability into trusted, functionally superior, and routinised consumer experiences.

However, the strength is shaped by broader structural conditions, including the degree of financial capacity available to sustain sustainability investment, the maturity and retail penetration of the relevant product category and the directional character of the institutional environment within which firms operate. This underscores the importance of examining sustainability-oriented BMI not merely as a firm-level strategic phenomenon but as one embedded within and shaped by macroeconomic, institutional, and consumer-behavioural conditions that sustainability strategy research has not yet sufficiently theorised.

6.1 Theoretical Implications

This study contributes to three interconnected bodies of literature: sustainability-oriented BMI, paradox theory, and consumer behaviour research. Taken together, the findings extend existing

understandings of how sustainability-oriented firms navigate competing demands under conditions of systemic uncertainty and sustainability normalisation.

Within the BMI literature, the study extends existing frameworks in two principal ways. First, it introduces strategic layering as a distinct form of sustainability-oriented value proposition reconfiguration in which sustainability is preserved as an operational baseline while functional attributes are foregrounded within consumer-facing communication. This finding adds a conceptually distinct navigational logic to the BMI literature that complements, but differs from, existing typologies of incremental and architectural innovation. Firms appear to embed sustainability structurally while recalibrating the visibility of sustainability within market-facing communication.

Second, the study identifies governance-level BMI as an insufficiently theorised dimension of sustainability-oriented firm adaptation. Governance architecture, through mechanisms such as external certification, accountability structures, and institutionalised sustainability commitments, generates commercially relevant brand trust effects that shape consumer PB. This establishes a direct conceptual bridge between organisational sustainability investment and market performance that existing BMI frameworks have not previously theorised explicitly.

Within paradox theory, the study extends the foundational contributions of Hahn et al. (2015) and Crane et al. (2014) by demonstrating that sustainability-oriented firms navigate not only sustainability-versus-profit paradoxes but also sustainability-versus-sustainability paradoxes requiring active intra-sustainability prioritisation. The findings further refine the legitimacy dimension through the concept of legitimacy asymmetry, suggesting that sustainability credibility functions as an increasingly constraining and cumulative organisational condition rather than purely as a strategic asset. Additionally, the finding that financial constraint operates as a systemic moderator at both firm and consumer level simultaneously extends paradox theory beyond its predominantly organisational framing into the domain of broader structural economic conditions.

The study further contributes to the conceptualisation of systemic uncertainty by extending it beyond regulatory unpredictability and market volatility. The findings suggest that sustainability-oriented firms increasingly operate under conditions of institutional adversity, characterised by contradictory institutional signals in which regulatory complexity expands while political commitment to sustainability transition weakens simultaneously. In parallel, communicative uncertainty emerges as an additional dimension of systemic uncertainty, reflecting the difficulty of translating sustainability investments into commercially meaningful

consumer legitimacy under conditions of consumer attention fatigue, inflationary pressure, and functional prioritisation.

Within the consumer behaviour literature, the study qualifies the TPB's emphasis on attitudinal strength as the primary determinant of sustainable PB. The findings demonstrate that sustainable consumption remains conditional upon functional product performance rather than being driven primarily by SA themselves. Sustainability, therefore functions less as an independent behavioural driver and more as a legitimating attribute that becomes commercially effective once primary functional requirements are satisfied.

Furthermore, the findings show that brand trust operates as a heuristic predictor of PB outside the TPB's traditional three-component structure of attitudes, subjective norms, and perceived behavioural control. Convenience and price similarly function as threshold conditions that enable rather than actively differentiate purchasing frequency once minimum expectations are met. The emergent mechanisms of consumer attention fatigue and flexible identity consumption further extend the attitude-behaviour gap literature by situating the gap within broader macroeconomic and identity-structural conditions rather than treating it as a purely individual psychological phenomenon.

Taken together, these contributions show that sustainability-oriented BMI is best understood as a multi-level process in which organisational responses, institutional conditions, and consumer-level dynamics jointly shape the commercial viability of sustainability-oriented value creation.

6.2 Practical Implications

The findings, drawn from Oatly AB's navigational approach across the German and Swedish markets, carry practical implications for sustainability-oriented firms, brand managers, and strategic decision-makers operating within mainstream consumer markets.

First, the findings suggest that the strategic priority under conditions of consumer attention fatigue and sustainability normalisation is functional integration rather than sustainability amplification. Firms that invest in genuine product quality, mainstream usability, and consumer experience while embedding sustainability structurally into products and operations appear better positioned for long-term commercial viability than firms relying primarily on sustainability-focused communication. The strategic layering logic identified in this study provides a practical navigational approach through which firms preserve sustainability as a foundational organisational commitment while foregrounding functional attributes such as taste, convenience, and product quality within consumer-facing communication.

Second, the findings highlight governance-level sustainability investment as an underutilised commercial source of brand trust. The quantitative findings demonstrate that brand trust predicts PB more strongly than explicit SA, while the qualitative strand identifies governance architecture as a key mechanism underlying this trust formation. Investments in external certification, accountability structures, and institutionalised sustainability commitments may therefore generate commercially relevant returns beyond their direct operational or compliance-related value. Firms that treat sustainability governance not merely as a reporting obligation but as a credibility-building mechanism may consequently strengthen long-term consumer trust and PB.

Third, the findings indicate that the absence of explicit ethical governance structures represents a strategic vulnerability for sustainability-oriented firms operating under conditions of heightened scrutiny and legitimacy asymmetry. Developing formalised ethical decision-making frameworks capable of guiding strategic responses to ethical tensions may reduce organisational exposure to legitimacy crises that reactive, case-by-case management cannot adequately prevent.

Finally, the findings suggest that commercial performance within sustainability-oriented product categories depends less on changing consumer sustainability beliefs and more on the structural integration of sustainable products into everyday consumption routines. The cross-national comparison indicates that differences in PB may emerge despite broadly comparable SA, suggesting that factors such as retail penetration, accessibility, product availability, and consumption normalisation are commercially consequential. Firms expanding across markets may therefore achieve stronger commercial outcomes by investing in structural market integration and mainstream usability rather than relying primarily on market-specific sustainability communication strategies.

6.3 Generalisability

The findings of this study are not intended to provide statistical generalisation to a broader population of sustainability-oriented firms. The single-case research design, centred on Oatly as a revelatory case, together with the two-market consumer survey restricted to Sweden and Germany, imposes clear boundaries on broader empirical representativeness. The qualitative strand reflects the strategic logic, governance architecture, and navigational responses of a specific firm operating within a particular sectoral and institutional context. Similarly, the quantitative strand captures consumer behaviour within two European markets that, while

theoretically motivated, do not represent the full diversity of national environments in which sustainability-oriented firms operate.

Nevertheless, the study pursues theoretical rather than statistical generalisation in line with Yin's (2018) case study approach. The analytical framework, the navigational mechanisms identified across the findings and discussion, and the refinements to the PF are therefore not presented as descriptions of Oatly specifically, but as theoretically transferable propositions concerning how sustainability-oriented firms navigate competing demands under conditions of systemic uncertainty.

The concepts of strategic layering, governance-level BMI, legitimacy asymmetry, institutional adversity, and invisible sustainability are consequently offered as analytically generalisable constructs that may extend beyond the immediate study context. These concepts are likely to be particularly relevant for firms characterised by deep sustainability positioning, mainstream consumer market exposure, and operational embeddedness within institutionally fragmented environments.

Transferability of the findings is strongest for sustainability-oriented firms operating within fast-moving consumer goods sectors where sustainability normalisation, consumer attention fatigue, and the attitude-behaviour gap create comparable strategic and commercial conditions. Future research employing comparative case designs or larger-scale cross-market survey studies across multiple firms and national contexts would strengthen the empirical basis for broader theoretical transferability and conceptual refinement.

6.4 Limitations & Future Research

This study offers valuable firm-level and consumer-level insights into how sustainability-oriented firms navigate competing demands under conditions of systemic uncertainty. Nevertheless, several limitations warrant consideration when interpreting the findings.

First, the geographic scope of the consumer survey is deliberately restricted to Sweden and Germany. While the two-market design enabled a theoretically motivated cross-national comparison and reflected strategically relevant markets for Oatly, the findings cannot be generalised beyond these national contexts. Institutional, cultural, and regulatory conditions shaping plant-based consumption vary considerably across markets, meaning that countries characterised by different sustainability norms, subsidy structures, or levels of plant-based market maturity may produce meaningfully different consumer and firm-level dynamics. Future research should extend the consumer-level analysis to markets with different sustainability

norm profiles, subsidy structures, and levels of plant-based market maturity to assess the transferability of the demand-side findings.

Second, two related limitations concern the quantitative sample. The imbalance between national subsamples, with Swedish respondents representing 26.8% ($n = 45$) compared to 73.2% for Germany ($n = 123$), reduces the statistical robustness of cross-national comparisons and may have introduced a directional bias toward German consumer patterns. Findings specific to the Swedish subsample should therefore be interpreted with additional caution. Additionally, the cross-sectional design limits the ability to draw causal conclusions regarding the relationship between sustainability attitudes, purchasing intentions, and PB. The regression analyses establish associations between constructs but cannot determine causal directionality. Assessing whether repeated plant-based purchasing reinforces sustainability attitudes over time, or whether pre-existing sustainability orientations primarily drive behavioural adoption, would require a long-term research design.

Third, the sample's demographic profile, with a mean age of 28 years and recruitment primarily through online channels, is broadly comparable to convenience samples of younger, educated consumers with moderate to high sustainability orientations. Findings may therefore not fully capture the attitudes and behaviours of older or less digitally active consumer segments, potentially overstating the prevalence of sustainability-oriented purchasing intentions relative to the broader consumer population.

Fourth, while the quantitative instrument operationalised key attitudinal and perceived behavioural control dimensions of the TPB, it did not include a direct item-level measure of subjective norms. This design choice reflected the study's analytical focus on structural purchasing barriers such as price sensitivity, convenience, and functional product performance rather than immediate interpersonal influence. To partially address this deficit, a cross-national comparative design was employed as a structural proxy for broader macro-normative conditions, consistent with Thøgersen's (2011) argument that sustainability norms vary systematically across national contexts. Nevertheless, the relative influence of immediate social pressures and interpersonal normative expectations on plant-based PB remains insufficiently captured within the present design and therefore constitutes an important avenue for future research.

Fifth, the health construct demonstrated comparatively low internal consistency ($\alpha = 0.554$), indicating that the included items may not have fully captured a single coherent underlying

dimension. While the construct was retained for exploratory purposes, findings related to health perceptions and motivations should therefore be interpreted with caution, and no strong conclusions are drawn regarding the role of health within the regression model. The development of a more psychometrically robust operationalisation of health motivation in plant-based food contexts is recommended for future research, with a view to clarifying its role as a purchase driver.

Sixth, the qualitative strand draws on a specific sample of experts concentrated primarily within the food and food technology sector, with particular emphasis on Oatly insiders and sustainability-oriented industry practitioners. While appropriate for the firm-level RQ addressed in the qualitative strand, this focus means that perspectives from other actors within the broader plant-based ecosystem, including retail buyers, policymakers, and consumer advocacy organisations, remain comparatively underrepresented. The enabling conditions and strategic response patterns identified in this study may therefore be more characteristic of sustainability-positioned food brands than of the broader sustainability-oriented business landscape.

Finally, a further limitation concerns researcher positionality. Both researchers are embedded within a European academic context with personal familiarity with plant-based consumption and sustainability discourse. This shared orientation may have introduced interpretive sensitivities into the qualitative coding and thematic analysis that cannot be fully neutralised through methodological safeguards alone. While the abductive analytical logic and collaborative codebook development partially mitigate this risk, findings should be interpreted with awareness that a research team with different ideological orientations toward sustainability might have weighted emergent themes differently.

Beyond the limitations identified above, the invisible sustainability concept and the ethical governance gap introduced in this study remain empirically underexplored and would benefit from dedicated theoretical development and cross-sectoral empirical testing in future research.

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Appendix

Appendix A Internal Oatly Interview Guide

Thank you very much for taking the time to participate in this interview. This interview is part of a master's thesis at Lund University on how firms navigate competing sustainability demands under conditions of systemic uncertainty, with Oatly as the focal case. The interview will take approximately 45-60 minutes. With your permission, the conversation will be recorded and fully anonymised. You may decline to answer any question and may stop the interview at any time. Do you have any questions before we begin?

Introduction (Role & Context)

1. Could you briefly describe your role and your main areas of responsibility?
 - What are your main tasks and decision areas?
 - How does your role connect to broader strategic or operational decisions?
2. To what extent does your role involve sustainability-related issues, either directly or indirectly?
 - In which situations do sustainability-related considerations become relevant in your work?
 - Which sustainability topics are most visible from your position?
3. From your perspective, how has Oatly's sustainability agenda evolved in recent years?
 - Have external pressures or expectations changed?
 - Are there areas that have become more contested or more important?

Salient Sustainability Tensions at Oatly

4. Which tensions between sustainability expectations and the company's actual practices or outcomes are currently most relevant for Oatly?
 - Which tensions arise most frequently in practice and in which areas (e.g. pricing, sourcing, communication, product development or market expansion)
 - Are there particular trade-offs that stand out?
5. Can you describe one or two concrete examples where sustainability ambitions came into tension with commercial or organisational realities?
 - Which priorities or stakeholders were involved?

- Are there tensions that can only be managed, but not fully solved? (persistent rather than temporary)

Strategic Responses

6. (How has Oatly responded to these tensions in practice?)
 - What kinds of responses have been used?
 - Have there been clear patterns in how tensions are handled?)
7. How are such trade-offs typically discussed and prioritised internally?
 - Who is usually involved in these discussions?
 - Are there recurring decision-making processes or routines?
 - How are competing priorities weighed against each other?
8. Have these tensions led to changes in Oatly's business model, product strategy, market positioning, or communication?
 - Have they influenced value creation, product portfolio or pricing logic?
 - Have they changed how Oatly presents itself in the market?
9. Are there specific processes, governance mechanisms, KPIs, or decision criteria that help Oatly navigate these tensions?
 - Are there formal structures that support these decisions?
 - Do certain metrics or frameworks play an important role?
10. Have there been situations where Oatly deliberately accepted a trade-off in one area to protect another strategic priority?
 - What was prioritised, and why? (And what were the consequences?)
 - How was that decision justified internally?

Product, Market and Customer Perspective

11. From Oatly's perspective, what factors most strongly influence customer purchasing decisions for sustainability-positioned oat-based products?
 - Which factors tend to matter most in practice?
 - Are there clear differences between customer groups or markets?

12. How do factors such as price, taste, health perceptions, convenience, sustainability concerns, and brand trust interact in shaping demand?
- Do customers accept trade-offs between these factors?
 - Is there a combination of factors that is especially important?
13. Where do you see the main barriers to broader or more frequent consumer adoption of Oatly products?
- Is price the main barrier, or are other issues equally important?
 - Are there barriers that are underestimated from a company perspective?
14. To what extent do these consumer and market realities shape Oatly's strategic choices?
- Do they shape innovation or communication priorities?
 - Do they influence pricing and positioning decisions?
 - How strongly do they affect long-term strategic direction?

Reflection & Outlook

15. Looking ahead, which sustainability-related tensions do you expect to become more important for Oatly?
- Are there tensions that are likely to intensify?
 - Are there emerging market, regulatory, or supply-side pressures?
16. Is there anything important we have not covered that you believe is essential for understanding how Oatly navigates competing sustainability demands?
- Is there anything that is often misunderstood from the outside?
 - Are there any final reflections you would add?

Closing

Thank you very much for your time and insights. Your input is highly valuable for our research.

Appendix B External Interview Guide

Thank you very much for taking the time to participate in this interview. This interview is part of a master's thesis at Lund University examining how sustainability-positioned firms navigate competing sustainability demands under conditions of systemic uncertainty. The interview will take approximately 45-60 minutes. With your permission, the conversation will be recorded and fully anonymized. You may decline to answer any question and may stop the interview at any time. Do you have any questions before we begin?

Introduction (Role & Context)

1. Could you briefly describe your role and your main areas of responsibility?
 - What are your main tasks and decision areas?
 - How does your role connect to broader strategic or operational decisions?
2. To what extent does your role involve sustainability-related issues, either directly or indirectly?
 - In which situations do sustainability-related considerations become relevant in your work?
 - Which sustainability topics are most visible from your position?
3. From your perspective, how have firms' sustainability agendas evolved in recent years?
 - Have external pressures or expectations changed?
 - Are there areas that have become more contested or more important?

Relevant Sustainability Tensions

4. From your experience, which tensions between sustainability expectations and actual business practices are currently most relevant for firms with strong sustainability ambitions?
 - Which tensions arise most frequently in practice and in which areas (e.g. pricing, sourcing, communication, product development or market expansion)
 - Are there particular trade-offs that stand out?
5. Can you describe one or two concrete examples where sustainability ambitions came into tension with commercial or organisational realities?
 - Which priorities or stakeholders were involved?
 - Are there tensions that can only be managed, but not fully solved?
(persistent rather than temporary)

Strategic Responses

6. Based on your experience, how do firms typically respond to these tensions in practice?
 - What kinds of responses have been used?
 - Have there been clear patterns in how tensions are handled?
7. From your perspective, how are such trade-offs typically discussed and prioritised?
 - Who is usually involved in these discussions?
 - How are competing priorities weighed against each other?
8. In your experience, have these tensions led firms to adjust their business models, market positioning, communication, or value creation logic?
 - Have they influenced value creation, product portfolio or pricing logic?
 - Have they changed how firms present themselves in the market?
9. Are there specific processes, governance mechanisms, KPIs, or decision criteria that you have seen organisations use to navigate these tensions?
 - Are there formal structures that support these decisions?
 - Do certain metrics or frameworks play an important role?
10. Have you observed situations where firms deliberately accepted a trade-off in one area in order to protect another strategic priority?
 - What was prioritised, and why? (And what were the consequences?)
 - How were such decisions typically justified?

Product, Market and Customer Perspective

11. From your perspective, what factors most strongly influence customer decision-making for sustainability-positioned products or offerings?
 - Which factors tend to matter most in practice?
 - Are there clear differences between customer groups or markets?
12. How do factors such as price, product attributes (e.g. taste and health), convenience, sustainability concerns, and brand trust interact in shaping customer demand?
 - Do customers accept trade-offs between these factors?
 - Is there an especially important combination of factors?
13. Where do you see the main barriers to broader customer adoption of sustainability-positioned products or business offerings?
 - Is price the main barrier, or are other issues equally important?

- Are there barriers that are underestimated from a company perspective?

14. To what extent do these customer and market realities shape firms' strategic choices?

- Do they shape innovation or communication priorities?
- Do they influence pricing and positioning decisions?
- How strongly do they affect long-term strategic direction?

Reflection & Outlook

15. Looking ahead, which sustainability-related tensions do you expect to become more important for firms with strong sustainability ambitions?

- Are there tensions that are likely to intensify?
- Are there emerging market, regulatory, or supply-side pressures?

16. Is there anything important we have not covered that you believe is essential for understanding how firms navigate competing sustainability demands?

- Is there anything that is often misunderstood from the outside?
- Are there any final reflections you would add?

Closing

Thank you very much for your time and insights. Your input is highly valuable for our research.

Appendix C Survey Questions & Answer Options

Oat Milk Purchasing Drivers

Consumer Survey | Lund University Master's Thesis

This survey is part of a master's thesis research project at Lund University investigating how consumers make decisions about oat milk and oat-based dairy alternatives. Your participation is voluntary and anonymous. All responses will be treated confidentially and used for academic research purposes only. You may withdraw at any time without consequence.

By proceeding, you confirm that you are 18 years of age or older and consent to participate.

SECTION 1: Screening & Demographics

These questions help us understand who is participating. All information is anonymous.

What country do you currently live in? *

Note: Only residents of Sweden or Germany are eligible to participate.

- ☐ Sweden
- ☐ Germany
- ☐ Other country (survey will end here - thank you for your time)

What is your age? *

[Open numeric entry]

What is your gender? *

- ☐ Woman
- ☐ Man
- ☐ Non-binary / gender diverse
- ☐ Prefer not to say

What is your approximate annual household income? (EUR per year / SEK per year) *

Please select the range that best applies to you.

- ☐ Below 30,000 EUR / 325,000 SEK
- ☐ 30,000 - 60,000 EUR / 325,000 - 650,000 SEK
- ☐ Above 60,000 EUR / 650,000 SEK
- ☐ Prefer not to say

Which of the following best describes your current diet? *

- ☐ Omnivore (I eat all types of food including meat and dairy)
- ☐ Flexitarian (I mostly eat plant-based but occasionally eat meat / dairy)
- ☐ Vegetarian (I do not eat meat but may consume dairy / eggs)

- ☐ Vegan (I do not consume any animal products)
- ☐ Other / Prefer not to say

How often do you purchase dairy milk? *

- ☐ Never
- ☐ Less than once a month
- ☐ About once a month
- ☐ About twice a month
- ☐ About once a week
- ☐ More than once a week

SECTION 2: Sustainability Attitudes

Please indicate how much you agree or disagree with the following statements about food and the environment.

Scale: 1 = Strongly disagree | 4 = Neither agree nor disagree | 7 = Strongly agree

Statement	1 Strongly disagree	2	3	4	5	6	7 Strongly agree
I consider the environmental impact of food when making purchasing decisions.	☐	☐	☐	☐	☐	☐	☐
Reducing my diet's environmental footprint is personally important to me.	☐	☐	☐	☐	☐	☐	☐
I am willing to pay more for food products that are better for the environment.	☐	☐	☐	☐	☐	☐	☐
I actively seek out information about the sustainability of food products I buy.	☐	☐	☐	☐	☐	☐	☐
Sustainable food consumption is part of my personal identity.	☐	☐	☐	☐	☐	☐	☐

Statement	1 Strongly disagree	2	3	4	5	6	7 Strongly agree
Please select option 4 for this question. [Attention check]	O	O	O	O	O	O	O

SECTION 3: Oat Milk Consumption Behaviour

These questions are about your experience purchasing oat milk and oat-based dairy alternatives.

Scale: 1 = Strongly disagree | 4 = Neither agree nor disagree | 7 = Strongly agree

Taste

Statement	1 Strongly disagree	2	3	4	5	6	7 Strongly agree
Taste plays an important role in my purchase decisions for food and beverages.	O	O	O	O	O	O	O
I am more likely to buy oat-based dairy alternatives when I expect them to taste good.	O	O	O	O	O	O	O
A good taste experience is essential for me when choosing oat-based dairy alternatives.	O	O	O	O	O	O	O
Even sustainable products are unattractive to me if the taste does not meet my expectations.	O	O	O	O	O	O	O
Compared to conventional dairy products, oat-based alternatives offer a satisfying taste.	O	O	O	O	O	O	O

How often do you purchase oat milk? *

- ☐ Never
 - ☐ Less than once a month
 - ☐ About once a month
 - ☐ About twice a month
 - ☐ About once a week
 - ☐ More than once a week
-

SECTION 4: Oat Milk Purchasing Drivers

These questions explore what drives your decisions when purchasing oat milk.

Purchasing Drivers

How important are the following factors when you decide to buy oat milk?

Scale: 1 = Not at all important | 4 = Neutral | 7 = Extremely important

Factor	1 Not at all important	2	3	4 Neutral	5	6	7 Extremely important
The price is affordable compared to other options.	☐	☐	☐	☐	☐	☐	☐
It tastes good and meets my expectations.	☐	☐	☐	☐	☐	☐	☐
It is a healthy choice for me.	☐	☐	☐	☐	☐	☐	☐
It has a lower environmental impact than dairy milk.	☐	☐	☐	☐	☐	☐	☐
I trust the brand that makes it.	☐	☐	☐	☐	☐	☐	☐
It is easy to find in my usual shop.	☐	☐	☐	☐	☐	☐	☐

If you had to choose only ONE factor that most influences your oat milk purchasing decision, what would it be? *

- ☐ Price
- ☐ Taste

- ☐ Health
- ☐ Environmental impact
- ☐ Brand trust
- ☐ Convenience / Availability

Health Perceptions

Scale: 1 = Strongly disagree | 4 = Neither agree nor disagree | 7 = Strongly agree

Statement	1 Strongly disagree	2	3	4	5	6	7 Strongly agree
Health benefits are an important factor when I choose oat-based dairy alternatives.	☐	☐	☐	☐	☐	☐	☐
Nutritional content influences my purchasing decisions for oat-based products.	☐	☐	☐	☐	☐	☐	☐
I consider oat milk to be a healthy alternative to dairy milk overall.	☐	☐	☐	☐	☐	☐	☐

Convenience

Scale: 1 = Strongly disagree | 4 = Neither agree nor disagree | 7 = Strongly agree

Statement	1 Strongly disagree	2	3	4	5	6	7 Strongly agree
Availability: I am more likely to buy a product if it is available in my regular supermarket.	☐	☐	☐	☐	☐	☐	☐
Ease of Use: I prefer products that are easy to prepare or consume.	☐	☐	☐	☐	☐	☐	☐
Fit with Routine: A product is more attractive to me when it fits smoothly into my daily habits.	☐	☐	☐	☐	☐	☐	☐

SECTION 5: Oatly Brand Perception

These questions are specifically about the brand Oatly.

Are you familiar with the brand Oatly? *

- ☐ Yes - I know this brand
- ☐ No - I have never heard of this brand

The following questions are shown only to respondents who are familiar with Oatly.

Oatly Brand Perception

Scale: 1 = Strongly disagree | 4 = Neither agree nor disagree | 7 = Strongly agree

Statement	1 Strongly disagree	2	3	4	5	6	7 Strongly agree
Oatly is a credible sustainability brand.	☐	☐	☐	☐	☐	☐	☐
Oatly's products are priced fairly given their sustainability credentials.	☐	☐	☐	☐	☐	☐	☐
I would purchase Oatly more frequently if it were more affordable.	☐	☐	☐	☐	☐	☐	☐
I trust Oatly's sustainability claims.	☐	☐	☐	☐	☐	☐	☐
Oatly's marketing feels authentic and consistent with its actual practices.	☐	☐	☐	☐	☐	☐	☐

SECTION 6: Price Sensitivity

The following questions are about the price of oat milk. Please think about a standard 1-litre carton purchased in a supermarket.

Important: Please answer all four questions below. Your answers should follow this logic:
Answer 1 < Answer 2 < Answer 3 < Answer 4.

At what price would oat milk be SO CHEAP that you would question its quality? (EUR / SEK) *

[Numeric entry]

At what price would oat milk be a BARGAIN - good value for money? (EUR / SEK) *

[Numeric entry]

At what price would oat milk be EXPENSIVE but you would still consider buying it? (EUR / SEK) *

[Numeric entry]

At what price would oat milk be SO EXPENSIVE that you would NOT buy it? (EUR / SEK) *

[Numeric entry]

SECTION 7: Willingness to Pay Premium

These questions ask about the price premium you would accept for sustainably certified oat milk.

For reference: Conventional dairy milk typically costs approximately 1.00 EUR / 11 SEK per litre in supermarkets.

What is the maximum premium above the price of conventional dairy milk that you would be willing to pay for sustainably certified oat milk? *

- ☐ No premium - I would only buy it at the same price as dairy milk
- ☐ Up to 10% more (e.g. 1.10 EUR / 12 SEK per litre)
- ☐ Up to 20% more (e.g. 1.20 EUR / 13 SEK per litre)
- ☐ Up to 30% more (e.g. 1.30 EUR / 14 SEK per litre)
- ☐ Up to 40% more (e.g. 1.40 EUR / 15 SEK per litre)
- ☐ Up to 50% more (e.g. 1.50 EUR / 16 SEK per litre)
- ☐ More than 50%

Thank you for participating in this survey.

Your responses contribute to academic research on sustainable consumer behaviour and oat milk purchasing decisions. All data is treated anonymously and confidentially.

Appendix D MAXQDA Code Matrix Browser

Codesystem	Interv...	Interv...	Interv...	Interv...	Interv...	Interv...
▼ Emergent Codes						
Research			2	3	1	1
Covid-19		3		1		
Needs Pyramid				1		
Ethics	1			2	3	1
▼ Emergent Markets & Consumer						
Flexible Identity Consumption					7	1
Taste	2			3	5	6
Consumer Attention Fatigue	1			2	4	3
Price	2		4	6	5	4
Customer Preferences	3		6	8	10	4
Nutrition	1		2	2		
Identity	3	1	2	1	2	
Milk Consumption		1	1	4		2
Cultural Differences	3	2		2		1
Quality	1	5		3	1	
Brand Trust	2			3		
Health				1		
Convenience					1	4
▼ Enabling Conditions						
Sustainability Innovation Shelving					2	
Reconfiguring Capability	2		1	2	4	2
Agility		3		1	1	1
Resources	2	2	3	6	2	1
Sensing	1	1	2	2	3	
Resilience	1	2			1	1
National Market Context	3	3	1	2	2	
Consistency	1			1		
▼ Sustainability Tension						
Legitimacy Tension	5		1	5	1	2
Stakeholder Pressure	1			4	5	
CO2		4	2			
Market Pressure	2	1	2	3	4	
Geopolitical Tensions	3	4	2	2	1	
Future Tensions	1	4	3	3	4	1
Future Thinking		4	4	4	2	3
Consumer belief vs. operational rec	3	1	1	3	3	1
Profitability vs. sustainability invest	5	7	4	5	7	3
Supply Chain Tension	5	4	1	2	3	2
Uncertainty	1	5	4	3	1	3
Multi-dimensional sustainability pro	6	10	7	6	7	2
Regulations	1	4	1	2	1	6
Proactive Sustainability Leadership		1		2	1	4
Academic-Practitioner Sustainability	1		3			
CSR (Sustainability as a Whole)	1	1	2		4	1
Normalization of Sustainability	1		2	2	5	2
▼ Business Model Response						
Institutional Channel Targeting					3	1
Ownership Structure as Sustainabil					2	
Sustainability	2			7	11	3
Strategy	3			6	7	7
Absence of ethical strategy	5	1	1	1		
Intra Sustainability Prioritization	3	2	1	1	1	1
Communication	5			8	4	4
Product portfolio	2		1	3		
Circular Economy	1		1			
Sustainability Reporting		4	5		2	1
Narrative	10	3		8	8	8
Sustainable Repositioning	3	5	2	8	2	2
Organic		1				
Cost Reduction Through Sustainab		2				
Sustainability Agenda	4	6	2	1	2	4
Product Innovation	1		1	7	8	

Figure 11: MAXQDA Code-Matrix-Browser.

Appendix E Codebook & Codebook Change Log

#	Code Name	Definition	Anchor Example	Stage
Dimension 1: Sustainability Tension (SRQ1)				
A1	Stakeholder Pressure	Competing demands from investors, retailers, regulators, and civil society that pull the firm in incompatible strategic directions simultaneously.	I, you know, then moving maybe away from, moving away from environment and taking, you know, (...) taking this from a sort of a different part of sustainability. Of course you can. I don't know how much the tension, but of course, at least subject for discussion. (Interview 1, Pos. 31)	1
A2	Legitimacy Tension	Credibility risk arising when sustainability claims are publicly contested, contradicted by strategic decisions, or insufficiently evidenced.	It's not like you can be quite vocal in one channel and think that that's not going to travel to another channel. These days, it travels in a second. So we said, well, wait a minute. You just said, oh, shit, we said something different. So you have to, you have, you have to be, it's not like you have to be careful. You just have to be thoughtful. (Interview 1, Pos. 48)	1
A3	Supply Chain Tension	Conflict between sustainability commitments in sourcing and the cost, availability, or reliability of sustainable inputs.	Largest gap, I think, is I think I think that will be transportation. Okay. So I, I think that that is, that is the largest gap, you know, in the, in other areas, we are delivering quite well on, on our sustainability goals. (Interview 1, Pos. 22)	1
A4	Profitability vs. sustainability investment	Direct tension between allocating financial resources to sustainability initiatives and maintaining commercial viability.	It's when it costs money, you have to make trade offs and then you need to take the decision at the very top right. If you want to make a product that you can potentially lose money on. (Interview 2, Pos. 75)	1
A5	Market Pressure	External competitive and market dynamics that pressure the firm to adapt or compromise its sustainability strategy.	So I mean, the consumer pressure is kind of indirect to us, but of course, we need to follow the trends from the consumer. (...) I mean, it's, I think like when you look into the sustainability, it's, I mean, we always have an advantage in that way compared. (Interview 3, Pos. 72)	1
A6	Regulations	Impact of existing or emerging regulatory frameworks on the firm's sustainability strategy and operations.	There will always be more and more regulations, at least if we see where the world is going now. So there will be new water regulations by 2030. So then water will play a big role in in sustainability, water has been an abundant, abundant source, or has come from abundant sources for many years, at least up here in the Nordics. (Interview 2, Pos. 133)	1
A7	Consumer belief vs. operational reality gap	Tension between simplified consumer perceptions of sustainability and the complex operational	So there is a tension between what the consumer believes and, and the actual truth and the practices in the farming versus another practice in farming. So	1

		realities of sustainable production and sourcing.	there is not so black and white. It's not about the weight of the material. It's like super complex, like how is biodiversity and you know, the pasture managed, etc.. (Interview 2, Pos. 45)	
A8	Multi-dimensional sustainability pressure	Recognition that sustainability obligations extend beyond environmental concerns like CO2 to encompass biodiversity, water, soil, animal welfare, social like nutrition, and cultural dimensions as well as economical simultaneously	I think we need to define sustainability. And often people think that it's like, only CO2 emissions and reductions that we're talking about, but it's a broad array of, of things, right? So is the CO2 emission is also the environment where biodiversity and, how we treat our land. Right? Yeah, water is super important and part of that land management. Nutrition is super important and part of sustainability as well. Everybody needs to have access to good nutrition in order to live sustainably. And the cultural aspect is also part of sustainability. (Interview 2, Pos. 19)	1
A9	Geopolitical Tensions	Macro-level political instability, trade conflicts, or contested market presence creating ethical and operational sustainability tensions.	Is it okay to source from China? Is it okay to source from Iran? Is it okay to source from. And you put any kind of country because the political tensions are growing by the day. Right? And, and these geopolitical, happenings is affecting companies and their credibility. (Interview 2, Pos. 123)	1
A10	Uncertainty	Explicit articulations of strategic, market, or epistemic uncertainty, including VUCA conditions and the difficulty of long-term planning.	It's, it's, I mean, as the word is now, it's really hard to speculate what will be important if ideas. I think that's, that's what we are struggling with to kind of be able to see the future. It was much easier seven, eight years back to, to set the five years plan. It's, that's not so easy. For the moment. Are we able to get crops out? Are we able to get, like, fertilizing, for the fields, things like that. (Interview 3, Pos. 103-104)	1
A11	Future Tensions	Anticipation of sustainability-related pressures expected to intensify, including sourcing ethics, water regulation, and geopolitical instability.	I think it's I, I. (...) I think that. (4) I don't I don't know if if there is any particular, let's say, area within sustainability that would be more or less important in relation to, let's say, commercial decisions. I think that my guess and I don't know this. So so you have to bear with me. It's a guess, but I think that the the tension going forward would will be a stronger, let's say, between commercial and sustainability. (Interview 1, Pos. 105)	1
A12	Future Thinking	Forward-looking strategic orientation, planning and positioning around	But of course, we are also looking into how to use AI in the best way. But I would say that there is a big consciousness around the,	1

		anticipated future consumer, regulatory, and market conditions.	the climate impact and energy use in AI. And that is something that we are constantly like adhering to and, and discussing internally. Okay, how should we, how should we use AI? (Interview 6 , Pos. 29)	
A13	Normalization of Sustainability	Trajectory by which sustainability moves from visible differentiator to embedded operational norm, less prominent in narrative, more deeply integrated in practice.	So, so what you will see going forward, I think would be, what you can see in many other companies that are, driving a very strong, sustainability agenda. But you don't see it, you don't hear it. (Interview 1 , Pos. 111-112)	2
A14	Academic-Practitioner Sustainability Gap	The gap between academically sophisticated sustainability conceptions and corporate practice, including contested research as a basis for strategy.	The fact that you don't pollute doesn't mean that you are sustainable, if you ask me. That's not how I would define it. I said, sure, you don't pollute, that's great for you, but you know you're still not sustainable. Yeah, if you ask me. So, so, so, there are, and that's a discussion that you have only in the academics. This is a discussion you don't have in any company. (Interview 1 , Pos. 122-123)	2
A15	CSR (Sustainability as a Whole)	References to sustainability in its broadest sense, encompassing ecological, social, cultural, nutritional, and ethical dimensions simultaneously.	[...] sustainability is so much more than CO2 emissions. It's, the cultural aspect of it. Nutritional aspect is also about the environment and the biodiversity, etc. so it's a huge play of things that you need to take into consideration. And that's why it's so complex. (Interview 2, Pos. 139)	2
A16	Proactive Sustainability Leadership	It refers to the proactive pursuit of ambitions that exceed regulatory compliance requirements and current market expectations. Firms demonstrating this pattern do not merely respond to external sustainability pressures but actively design governance structures, certifications, and strategic frameworks that position sustainability as a foundational organisational standard. This is sustained even when commercial or institutional conditions make it costly or	I think it was launched together with this plan, but we are also the world's first, climate solutions company. (Interview 6 , Pos. 56)	

		communicatively unrewarding to do so.		
Dimension 2: BMI Responses (SRQ2)				
B1	Sustainable Repositioning	Deliberate strategic shift in how the firm frames its sustainability credentials, often from environment-first to health- or quality-first messaging.	I mean, the. Not really, I think it's an evolving thing and you take steps in a direction. I mean, the company change their a narrative during those nine years I was there. You know, they had to evolve and show that they were doing more about, you know, the environment and they were doing. (Interview 2, Pos. 61)	1
B2	Narrative	Strategic use of storytelling and communication to build brand identity, convey sustainability values, and manage legitimacy with stakeholder audiences.	It's not like you can be quite vocal in one channel and think that that's not going to travel to another channel. These days, it travels in a second. So we said, well, wait a minute. You just said, oh, shit, we said something different. So you have to, you have, you have to be, it's not like you have to be careful. You just have to be thoughtful. (Interview 1, Pos. 48)	1
B3	Cost Reduction Through Sustainability	Cases where sustainability-oriented changes simultaneously reduce costs, material efficiency, waste reduction, or process innovation.	So if you reduce the amount of steel that you use in the component, you save money because you, you use less material and you save CO2 because the material is emitting CO2 when it's produced. And you, you consume less CO2 during transportation because the weight is less. (Interview 2, Pos. 37)	1
B4	Sustainability Reporting	Practices around measuring, documenting, and communicating sustainability performance.	So those numbers have been recalculated and resubmitted and reapproved. So it's not a static area. It's a very dynamic area that moves, a lot. So. So having one firm sustainability agenda with firm numbers is very difficult because it changes all the time. (Interview 2, Pos. 55)	1
B5	Product Innovation	New product or process developments, including side stream utilisation, barista formats, and portfolio extensions, as BMI responses to sustainability tensions.	And now we have just recently, I mean, we launched a product which is called foam, which is a barista product. Okay. But, you know, you can you shake it and you get foam. (Interview 1, Pos. 75-76)	1
B6	Circular Economy	Business model reconfigurations applying circular principles, waste reduction, material recovery, closed-loop production, to sustainability strategy.	I mean, as I said, I, I work with the side stream and it's, it's very like almost circular to, to, I mean, because, I don't know if you imagine that you have the oats and then you press out some of the nutrients to get the, the drink and then you still have like a porridge left where you have a lot, a lot of, nutrition left, in this porridge. And it's really, really a waste, both economical, but also,	1

			of course sustainable, to just throw that away. So I mean, that that's a really, main driving force to, to make this as food to, to take not having like a leftover, but using the whole crop that we actually are, having from the beginning. (Interview 3 , Pos. 32)	
B7	Product Portfolio	Portfolio-level strategic decisions, diversification, tiering, side stream utilisation, as BMI responses to sustainability and commercial tensions.	Kind of a small kind of a small niche. We, we as a company don't have the whole dairy section. We don't. I mean, we have cream, we have ice cream. We don't have a creme fraiche, for example, as the dairy. So the there need to be some change in food, pattern, that could change, change our business. But the changing food habits is, is a very, that's a long term change. (Interview 3 , Pos. 95)	1
B8	Strategy	The presence or absence of formalised strategic frameworks for navigating sustainability tensions, including long-term planning and ethical decision-making structures.	Oh yeah. So the market realities shape yeah. They shape the strategy quite a lot. I mean, now we're talking about not sustainability, the, the sustainability strategy. (Interview 1 , Pos. 94)	1
B9	Communication	Strategic communication management across channels and markets, including the careful/thoughtful distinction and cross-channel consistency requirements.	No. Yeah. Well so so the external pressure to, to, to adjust the communication is as I said, not as far as I'm concerned, not the lack of interest. (Interview 1 , Pos. 15-16)	1
B11	Absence of ethical strategy	The explicit absence of a formalised ethical framework for navigating sustainability tensions, resulting in ad hoc case-by-case decision-making.	And, and, I'm not sure really how the argument goes. But, and I would be. I'm probably one of those. It would be most interested to hear how the, how that line of reasoning looks like because to me, I mean, honestly, (..) They are, they should be treated equally the same. (Interview 1 , Pos. 35-36)	2
B12	Intra-sustainability prioritisation	The strategic process of prioritising specific sustainability dimensions over others when full simultaneous progress is not feasible.	But sometimes you have to change the material altogether to a more greener material that is more expensive to, to purchase. (Interview 2, Pos. 39)	2
B13	Ownership structure as sustainability enabler	The degree to which a firm's ownership structure, private, family, publicly listed, or state-owned, shapes its capacity for long-term sustainability investment by determining the time horizon of financial	It's a private owned company. And then you can afford to be quite. Look long term ahead and you don't need to make the money. You know, the next day. (Interview 5, Pos. 16)	2

		performance expectations and the degree of quarterly earnings pressure that constrains strategic flexibility.		
B14	Institutional channel targeting	The deliberate targeting of institutional food channels, school canteens, elderly care homes, hospital catering, public procurement, where collective food decisions are made by institutional gatekeepers rather than individual consumers, enabling plant-based products to reach habit-forming stages of life or constrained-choice contexts without requiring individual sustainability motivation.	I think also it's good to target like public procurement, you know, go to school canteens, elderly homes, you know, where they cannot choose so much. (Interview 5, Pos. 73)	2
Dimension 3: Enabling Conditions (SRQ2)				
C1	Sensing	Capacity to identify and interpret sustainability-related signals from the external environment, including regulatory, market, and stakeholder developments.	Of course, you you take the opinion, from a local level, to say, okay, how. What's the, what's the temperature? What is, what is cooking on, on a local level? Then you also take this on a management level and say, okay, this is, this is what? What's going to happen? This is what we're going to do, or this is what we're going to communicate. Yeah. And, and then you have, different sort of competencies. So you have commercial, you have sustainability, legal, regulatory and all. (Interview 1, Pos. 50)	1
C2	Reconfiguring Capability	Capacity to transform existing assets, routines, and business model configurations in response to sustainability imperatives.	You need to work on the factory, you need to work on the culture, you need to work on how you communicate it. You need to take it into account when you are, you do your, you need to take it into account how you, report it (Interview 3, Pos. 80)	1
C3	Resilience	Capacity to absorb disruptions, ecological, regulatory, or market-driven, and maintain strategic continuity.	I think, resilience. [...] Being able to navigate the these changes is so important. And a lot of it's not only about sustainability, but a lot of companies are bringing things closer to themselves. (Interview 2, Pos. 27-29)	1
C4	Agility	Capacity to respond quickly and flexibly to shifting sustainability demands, market changes, or stakeholder expectations.	You need to be very agile and flexible because, things are happening from one day to another. (Interview 2, Pos. 21)	1

C5	Resources	Financial, human, and organisational resources available for sustainability-oriented business model innovation.	I mean, if you can spend money, you have a lot to spend. The financials are intact, strong and all that. It's easy to take all kind of decisions. Well, you're a little bit, you know, it's a little bit squeezed. You need to, you need to at times you need to, to, take, you know, let's say wealth maximization decisions. (Interview 1 , Pos. 64)	1
C6	National Market Context	The degree to which national institutional environment, consumer culture, and regulatory setting shapes the commercial viability of sustainability strategies.	If there are transporting barriers in the world that, you, you won't be able to import coffee in Sweden anymore or in, in, Scandinavia. I mean, that that could happen, but in a more culture way. I think, our product is, (..) I mean, most of our product is, is, you drink with coffee, so there need to be some change in coffee, coffee habits. (Interview 3 , Pos. 95)	1
C7	Consistency	Mechanisms ensuring coherent sustainability commitments across channels, markets, and strategic decisions.	I mean, not only, of course, for compliance reasons, but also to see that, we are consistent as, because as consistent as possible, because we cannot, we cannot shift and we cannot say two different things. Not so much for, you know, try to avoid confusion, but to avoid a situation where we suddenly find ourselves in a corner where we have some said something and now now we just can't, you know, we can't regret or back out of it. (Interview 1 , Pos. 56)	1
C8	Sustainability innovation shelving	The practice of developing sustainability-oriented innovations ahead of market readiness and deliberately deferring their commercialisation until regulatory, consumer, or resource price conditions create sufficient market pull, maintaining a shelf of ready solutions rather than abandoning or forcing premature market entry.	You would, put them in a, on the shelf and see, you know, when is the trend there and the environment there to sell them before you put even more money into develop new sustainable stuff? (Interview 5, Pos. 20)	2
Dimension 4: Emergent Markets & Consumer (SRQ3)				
E1	Price	Price as a primary structural barrier or enabler of sustainable purchasing decisions, including premium pricing dynamics and affordability thresholds.	I mean, it's, and also like, for, for like, plant based dairy, for example, is also more like political, like subsidization that milk is subsidized, the meat is to subsidize but not plant based. And how should we be able to get it into school when we're when	1

			we have a price that is so much higher because we are not subsidized, compared to cow milk (Interview 3 , Pos. 56)	
E2	Taste	The role of flavour, texture, and sensory quality as primary purchase drivers, ranked above environmental concern in consumer decision-making.	But, but the overall strategy is the same. Like we now we have for 26, one of, one of the, one of the strategic objectives is to go for, taste (Interview 1 , Pos. 100)	1
E3	Brand Trust	Consumer familiarity and credibility as a heuristic purchase driver, brand recognition reducing cognitive effort at the point of purchase.	So, so, then of course, you can also look at the, let's say the, not the brand only as such. I mean, how the packaging looks like it looks fancy and trendy and all that. (Interview 1 , Pos. 71)	1
E4	Customer Preferences	Consumer attitudes, habits, and preferences shaping demand for sustainability-positioned products, including cultural and demographic variation.	I mean, there are many reasons, but I think that the main reason, as we speak is that, sustainability is no longer on everybody's agenda, especially consumers, they have moved on to something else. (Interview 1 , Pos. 13)	1
E5	Milk Consumption	Patterns of dairy and plant-based milk consumption, market trends, cultural habits, and category dynamics including COVID effects.	Because it's not trendy to drink milk. People think he's unhealthy and there are a million other choices. So today I want to drink kombucha, tomorrow tea. And then maybe on Wednesday I will drink milk. But not every day. (Interview 2, Pos. 113)	1
E6	Cultural Differences	Variation in consumer values, quality perception, and sustainability awareness across national markets moderating the transferability of sustainability strategies.	I mean, if you go from Sweden to Denmark to, to Germany, for example, you travel from north to south. Quality means different things (Interview 2, Pos. 95)	1
E7	Quality	Perceived product quality, taste, texture, nutritional profile, durability, as a brand positioning dimension and purchase driver.	So emphasis is very much, delivering high quality products. And that is like their brand, their brand is built on quality. (Interview 2, Pos. 91)	1
E8	Nutrition	Nutritional properties of plant-based products as a driver of consumer adoption and health positioning.	So you have nutrition. That's one and that's still quite strong. (Interview 1 , Pos. 67)	1
E9	Identity	The role of sustainability-related self-concept in consumer purchasing decisions, the degree to which consumers define themselves through their consumption choices	I think it's, it's price, but it's also an identity. I think it's, is, is it's not, like, as I said, in like six years ago, the identity was very hard that I, I want to be sustainable. I want to be a vegan. And now it's it's more I don't want an identity anymore. (Interview 3 , Pos. 92)	1

		(vegan, flexitarian, sustainability champion) and how the erosion or flexibility of that identity affects willingness to pay a premium for sustainability-positioned products.		
E10	Consumer Attention Fatigue	Cyclical decline in consumer sustainability engagement during periods of competing personal or societal crises, not due to lost values but cognitive bandwidth limits.	You know, more to their own, private circumstances to, to, to, to ensure that, you know, they are intact. They are looking at. So what would be the next, the next, step or phase in sustainability, or the other other means to address it. You have, of course, a, everybody's talking about it so suddenly that's the theme of the day. That doesn't necessarily mean that they have lost interest. It's just that this is more this is the trend. (Interview 1 , Pos. 19)	2
E11	Flexible identity consumption	Someone who does not want a fixed sustainability identity but is willing to make more sustainable choices on a situational basis.	And that is, you know, people that usually could think of trade offs, you know, together. (Interview 5, Pos. 65)	2
Dimension 5: Emergent Codes				
D1	Covid-19	References to how the pandemic disrupted sustainability agendas, supply chains, and consumer behaviour.	And everybody was, home and they went back to basics. Yeah. So when Corona hit, there was a huge downturn or downtrend in sustainability and products. (Interview 2, Pos. 115)	2
D2	Research	Role of internal or external research, scientific, market, regulatory, in informing sustainability strategy and business model decisions.	[...] we need more research on what's actually, most beneficial to put your energy into or to, to, to take action on, I would say in the long term around not only short term, but long term, what's, what's actually having an effect. (Interview 3 , Pos. 45)	2
D3	Ethics	The distinction between moral responsibility (accountability when wrong) and ethical organisation (processes enabling ethical reflection).	That's an interesting discussion. But are you ethical in the first place? Because, as much as you want to do this externally, you need to do it internally. So quite often, I find sustainability to become a subject of, you know, sustainability goals and, and, CO2 and, and yeah, extremely important things, of course, but to me, to me, sustainability is much more. (Interview 1 , Pos. 120-121)	2
D4	Needs Pyramid	The structural displacement of sustainability as a purchase motivation by more immediate physiological and safety needs during periods of economic	One interviewee suggested that prior to the Covid-19 pandemic and the subsequent inflationary period, consumers operated from a position of economic security, in which foundational needs were largely met (Interview 4)	2

		stress, where sustainability values remain present but are outcompeted in the motivational hierarchy by base needs such as food security, rent, and financial stability, consistent with Maslow's (1943) hierarchy of needs.		
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Table 8: Qualitative Codebook Including Deductive and Inductive Codes Across Five Analytical Clusters.

Note: Deductive codes derived from the PF through template analysis. Inductive codes generated through subsequent thematic analysis. Code frequencies reflect total applications across all six interviews as recorded in MAXQDA.

Version	Date	Change made	Reason	Interview	Code Affected	By
V1.0	27 April 2026	Initial template created	Derived deductively from Chapter 2 framework	None	All codes	Both
V1.1	29 April 2026	Revised template Sustainability Regulations & Regulations	Merged codes together as they are too similar to make two different categories.	1	Change	Both
V1.2	06 May 2026	Added Absence of ethical strategy	Emerged inductively: even sustainability-committed firms navigate tensions without formalised ethical frameworks, not anticipated by preliminary framework.	1	New	Both
V1.3	06 May 2026	Added Consumer Attention Fatigue	Emerged inductively: participants described structural displacement of sustainability as purchase motivation by competing concerns, not captured by attitude-behaviour gap alone.	1	New	Both
V1.4	06 May 2026	Added Intra-sustainability prioritisation	Emerged inductively: participants described necessity of ranking competing sustainability	2	New	Both

			objectives internally when simultaneous optimisation is not feasible.			
V1.5	06 May 2026	Added Covid-19	Emerged inductively: participants referenced pandemic as contextual disruption shaping and shifting sustainability strategy and consumer behaviour.	2	New	Both
V1.6	06 May 2026	Added Research	Research Emerged inductively: participants referenced internal and external research processes as input to sustainability decision-making.	3	New	Both
V1.7	06 May 2026	Added Ethics	Emerged inductively: participants raised ethical considerations as distinct from regulatory or commercial sustainability pressures.	1	New	Both
V1.8	06 May 2026	Added Normalization of Sustainability	Emerged inductively: participants consistently described shift from sustainability as foregrounded brand claim to embedded operational standard.	1	New	Both
V1.9	06 May 2026	Added Academic-Practitioner Sustainability Gap	Emerged inductively: practitioners articulated richer conception of sustainability than what corporate discourse operationalises.	3	New	Both

V1.10	06 May 2026	Added CSR (Sustainability as a whole)	Emerged inductively: participants referenced CSR as broader organisational framing beyond specific sustainability initiatives.	3	New	Both
V1.11	06 May 2026	Added Need Pyramid	Emerged inductively: participant employed Maslow's hierarchy to explain reallocation of consumer attention away from sustainability during inflationary period.	4	New	Both
V1.12	06 April 2026	Added Ownership structure as sustainability enabler	External view how sustainability tensions can be looked at differently depending on ownership structures and it is not anticipated in template.	4	New	Both
V1.13	06 May 2026	Added Flexible identity consumption	Emerged inductively: participants described shift from identity-committed vegan consumers to flexitarian consumers, not captured by existing consumer behaviour codes.	4	New	Both
V1.14	08 May 2026	Added Institutional channel targeting	Emerged inductively: participants proposed strategic placement of plant-based products in constrained-choice settings as normalisation strategy.	5	New	Both

V1.15	08 May 2026	Added Sustainability innovation shelving	Emergent inductively: participants described systematic discontinuation of sustainability initiatives lacking viable business case.	5	New	Both
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Table 9: Codebook Development Log Documenting Iterative Revisions Across Analytical Stages.

Note: The change log documents the abductive movement between deductive template codes and inductively emergent codes throughout the analytical process, reflecting the iterative refinement of the coding structure in response to the empirical material.

Appendix F AI Usage

- Check this section for grammar or spelling mistakes.
- Can you suggest a clearer formulation of this sentence?
- Identify redundancies or repetitive wording in this section.
- Does this section flow logically and coherently?
- Can you provide feedback on the structure and readability of this section?
- Adapt this interview question from an internal stakeholder perspective to an external stakeholder perspective.
- Can you suggest alternative wording for this interview question?
- Does this interview guide adequately cover the dimensions of the preliminary framework?
- Does this survey question appear clear and understandable for respondents?
- Can you suggest a logical order for these survey questions?
- Review this R script and identify potential coding errors.
- Provide examples of R functions suitable for regression analysis and data visualisation.
- Convert the content of this PDF into an editable Word-compatible format.

Appendix G Word Count of Interview Transcripts

Word	#	%	Rank	Document %
sustainability	249	1,58	6	100,00
consumer	61	0,39	49	100,00
taste	52	0,33	59	100,00
price	41	0,26	74	100,00
trade	39	0,25	75	100,00
world	39	0,25	75	100,00
time	38	0,24	77	100,00
Oatly	36	0,23	79	100,00
money	31	0,20	91	100,00
oat	27	0,17	102	66,67
communication	26	0,17	104	100,00
grow	26	0,17	104	100,00
milk	26	0,17	104	66,67

Table 10: Most Frequently Occurring Words Across Interview Transcripts.

Appendix H Code Matching Interviewees

Document	1	2	3	4	5	6	7	8	9	10	11	12		
Interview 1	0	0	0	0	0	0	0	0	0	0	0	0		
Interview 2	0	0	0	0	0	0	0	0	0	0	0	0		
Interview 3	0	0	0	0	0	0	0	0	0	0	0	0		
Interview 4	0	0	5	0	6	0	7	0	0	0	0	0		
Interview 5	0	0	0	0	0	5	0	1	0	1	0	2		
Interview 6	0	0	0	0	0	0	0	0	0	0	0	2		
28	29	30	31	32	33	34	35	36	37	38	39	40	41	42
2	0	0	1	0	1	0	5	0	1	0	2	0	0	2
0	3	0	1	0	1	0	0	0	3	0	4	0	0	0
0	0	0	0	4	0	0	4	0	0	0	0	0	0	0
2	0	5	0	2	0	7	0	0	0	10	0	4	0	0
0	2	0	0	0	3	0	6	0	2	0	0	7	0	1
0	4	0	0	0	0	2	0	0	0	0	0	0	0	5
43	44	45	46	47	48	49	50	51	52	53	54	55	56	57
0	3	0	0	0	3	0	3	0	0	4	0	0	4	0
1	0	2	0	0	0	0	0	0	0	2	0	2	0	2
9	0	2	0	0	0	0	0	0	0	0	0	0	5	0
3	0	4	0	9	0	0	6	0	5	0	9	0	3	0
0	2	0	3	0	2	1	0	0	2	0	0	0	0	1
0	0	0	0	0	3	0	0	0	2	0	3	0	3	0

58	59	60	61	62	63	64	65	66	67	68	69	70	71	72
2	0	2	0	3	0	2	0	0	4	0	1	0	5	0
0	0	0	4	0	2	0	2	0	0	0	0	0	2	0
0	0	2	0	0	0	0	0	3	0	0	0	2	0	6
7	0	5	0	2	0	7	0	0	7	0	1	0	3	0
0	2	0	4	0	2	0	6	0	0	3	0	0	2	0
3	0	0	0	4	0	0	0	0	7	0	0	0	0	6

73	74	75	76	77	78	79	80	81	82	83	84	85	86	87
1	0	3	0	1	0	2	0	0	0	2	0	4	0	0
1	0	1	0	0	0	0	0	1	0	2	0	2	0	0
0	5	0	0	0	2	0	2	0	2	0	0	0	2	0
1	0	9	0	0	0	0	0	0	0	0	0	0	0	0
6	0	3	0	1	0	5	0	0	2	0	0	6	0	0
0	0	0	0	4	0	7	0	7	0	0	0	6	0	0

88	89	90	91	92	93	94	95	96	97	98	99	100	101	102
0	1	0	0	0	0	2	0	2	0	1	0	3	0	2
0	1	0	1	0	0	0	1	0	3	0	0	0	1	0
5	0	0	0	4	0	0	5	0	3	0	3	0	4	0
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	1	0	0	2	0	3	0	2
0	8	0	0	0	0	2	0	0	0	0	0	0	0	0

103	104	105	106	107	108	109	110	111	112	113	114	115	116	117
0	0	2	0	0	0	3	0	2	0	0	0	0	1	0
3	0	1	0	1	0	2	0	3	0	3	0	1	0	2
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0	2	0	0	0	0	0	3	0	0	0	1	0	2	0
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

118	119	120	121	122	123	124	125	126	127	128	129	130	131	132
2	0	3	0	2	0	0	0	1	0	0	0	0	0	0
0	3	0	1	0	5	0	3	0	2	0	3	2	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0	7	0	6	0	1	0	4	0	2	0	0	0	0	2
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

133	134	135	136	137	138	139	140	141	142	143
0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	2	0	2	0	1	0	1
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
0	0	0	5	0	1	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0

Table 11: Document Comparison Chart of Coding.