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BEER FROM HERE: PLACE ATTACHMENT OF DUTCH MICROBREWERIES

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“The label of one of our beers depicts a revolution, a group of revolutionaries, who represent the new generation of microbreweries, that come marching from the lands in an attempt to make beer great again. In the background, there is a burning building, and that building is the Heineken brewery. This symbolizes our mentality: our resilience to monoculture, trends, the large – we focus more on the local.”

– One of the interviewed brewery founders
Three years ago, I started my Bachelor Geography, Planning and Environmental Sciences at Radboud University Nijmegen. In the following years, I learned a lot about conducting research, critical thinking and a wide variety of research fields, in which we could often study our subject of interest. The broad scope of this bachelor not only offered a welcome amount of variety, but also offered a creative outlet for me as a student and allowed me to discover which subjects interested and enthused me most, for which I am truly grateful.

In hindsight, I suppose that it was inevitable that the subject of my bachelor thesis would be in the vein of local food production, with which I developed an affinity over the course of the last three years. In my first year, I wrote an essay on urban agriculture in Havana. In the next year, I investigated the various forms of urban agriculture in Japan and made a documentary on the similarities and differences between the urban agriculture movements in Cuba and the Netherlands, which was even premiered in the LUX theater in Nijmegen. Therefore, it seemed only natural to wrap up these three years with a study in the field of local food production. To provide a little twist, I chose to study the Dutch microbrewery scene, both for the sake of closing the existing theoretical void and out of love for their product, craft beer. Lastly, since Nijmegen allegedly has the highest per capita consumption of craft beer in the Netherlands (for which I do not deny being partially responsible), it makes sense to write this thesis at what is arguably the epicenter of the craft beer wave that is shaking up the Netherlands.

First of all, I would like to thank the participants of this study for their time and hospitality, namely Léon Bemelmans, Matthias Terpstra, Herm Hegger, Boyd Keijzer, Rick Nelson, Fokke Hettinga, Dirk Heupink, Jan de Vries, Rik Schuurmans, Stefan Duurkoop, Dyann van Alderen, Frank Hendriks and Rolf Katte. During my research, I also received a lot of support from my family, friends and supervisors. First of all, I would like to thank my mother for her help with the transcription of two of the interviews and my father for driving me to some of the more remote, less accessible breweries. Second, I would like to thank my supervisors Henk Donkers and Marlies Meijer for their time, feedback and enthusiasm about my research. Third, I would like to thank everyone who took the time to read this thesis and gave their feedback in the trajectory towards the final version of this thesis. Last (but not least), I would like to thank you, the reader, for your interest. And so, without further ado, I wish you a lot of pleasure reading.
In the last decades, there has been a proliferation in the number of microbreweries in the Western world, which stopped and inverted the preceding trend of increasing consolidation in the beer market. The Netherlands has not been exempt from this global trend, and has witnessed near exponential growth in the number of small breweries from the economic crisis of 2008 onwards. In the small body of literature about the subject, the most dominant explanation for this growth is that it is an expression of neo localism: a desire of the consumer to be reconnected with the local in the wake of globalization (Flack, 1997; Schnell & Reese, 2003; Mathews & Picton, 2015). Looking on the other side of the coin, this thesis examines how, why and to what extent microbreweries are attached to place and embedded in the local. This amounted to the following research question: “How and to what extent are microbreweries attached to their place of establishment?” Using the framework of place attachment constructed by Raymond, Brown & Weber (2010), this thesis attempts to shed light on how place is absorbed into the identity of microbreweries, which location factors are deemed important by them and how local the networks of microbreweries are. Subsequently, it examines how these factors attach the breweries to place – both at the brewery and city level.

For this study, 13 interviews were held at 12 different microbreweries, namely Dorpsbrouwerij De Maar, Katjelam Brewing, Stadsbrouwerij De Hemel, Delftse Stadsbrouwerij De Koperen Kat, Oedipus Brewing, Zwolse Stadsbrouwerij Hettinga Bier, Ootmarsumer Bierbrouwerij Heupink & Co, Jonge Beer Brouwerij, Brouwerij De Markies, Brouwerij Wageningen, Dorpsbrouwerij De Pimpelmeesch and Twentse Bierbrouwerij. The collected interview data was subsequently transcribed and coded in Atlas.ti. The websites of the breweries were also used for additional data.

The first research question of this study was “how can microbreweries be defined?”, as there is currently no definition for microbreweries in the Dutch context. On the basis of the interviews, microbreweries have been defined as breweries producing between 1,000 and 10,000 hectoliters [hL] annually. In addition, breweries producing less than 1,000 hL/year can be called nanobreweries, and breweries producing more than 10,000 hL/year can be considered large breweries. Based on this definition, nine breweries included in this study are nanobreweries, and only three breweries can be considered microbreweries. However, this definition is rather tricky, as production volume of a brewery cannot always be clearly measured and the definition was not agreed upon by all the participants. Since the majority of breweries are not microbreweries, this distinction was not made in the rest of this study, and all the included breweries are referred to as ‘microbreweries’, ‘breweries’ or ‘small breweries’.

The second research question was: “How are the identities of microbreweries connected to their place of establishment?” This study found that the identity of the brewery was very dependent upon the identity of the founder(s) of the brewery. When the founder grew up in the place where the brewery was located, he or she usually identified more with that place due to the built up stocks of knowledge such as memories and feelings, and was more inclined to use place in the branding of the brewery. Other personal factors that tied the brewery to place were the partner, family, friends and historic connections to the place. As a consequence of establishing the brewery, most participants started to identify more with their place, mainly because they acquired more social contacts in their place and participated in more local activities. Hence, microbreweries are not only attached to place by the founder, but breweries can be seen as tools of local identity that shape place attachment in the brewery founders.
The majority of the breweries used references to local places and histories in the name of their brewery and products. This was not only out of personal motives, but also was an important form of marketing: they evoke feelings of belongingness in the consumer, and attach the consumer – in particular locals and tourists - to the brewery. Although this is beneficial on the local market, some brewers believed that close association with a place could also make consumers from elsewhere indifferent to their product, which led breweries that attempted to sell their products on the regional, national or international market to refrain from using explicit references to places.

In several cases, the breweries were also tied to their place or region by taste, as they had to tailor their beers to the tastes of the local market. Through participation in local festivals, conducting market research and organizing beer tastings, they could get direct feedback from the consumer, which they could subsequently use to remodel their beers.

The third sub-question of this research was “which localization factors determine the connection of microbreweries to a place?”. Based on the (neo)classical, behavioral, evolutionary and institutional location theories, it was expected that microbreweries would either settle on (a) the location with the lowest production and transport costs, (b) the location that allows for profit maximization, (c) a location near the home or workplace of the brewer, (d) a location that sufficiently satisfied the needs of the firm or (e) a location near their most important suppliers and knowledge networks of the brewery (Atzema, Van Rietbergen, Lambooy & Van Hoof, 2012; Schutjens, Mackloet & Korteweg, 2006; Jovanović, 2008). Although these points were valid to a certain extent, most interviewees stated that ‘atmosphere’ was the most important location factor for them, because this contributes to their local and artisanal identity. For this reason, almost all participants saw historic locations, such as city centers, gentrified industrial lots and farmhouses as the most optimal locations for their brewery, because these naturally convey an artisanal, historic atmosphere. However, when brewers lacked the capital to acquire these relatively expensive locations, they settled on business estates or business incubators instead, as these locations are more affordable. These locations were often seen as temporary, because they lack the atmosphere desired by most breweries. However, some were attached to sub-optimal locations because they lacked the capital to acquire a visible and accessible (historic) location, had made large investments in their current location, had no further ambitions to expand their production volume or stated that the benefits of the more optimal location were too small in relation to the higher rent or price of the building, which made it more desirable to stay.

The fourth and last sub-question was “to what extent are microbreweries embedded in local networks?”. Here, the dimension ‘networks’ was split up into five sub-dimensions: the upstream supply chain, the downstream supply chain, relations with other breweries, relations with other local initiatives and relations with the local government.

None of the breweries included in this study used exclusively raw materials (barley and hops) from their place, province and country, and only three of the 12 breweries used barley or hops from their own province. Most breweries would like to use raw materials from their place or region in order to reinforce their local image, but nearly always stated that the price and quality of the raw materials were more important to them. At the moment, commercial hop production is near absent in the Netherlands. Similarly, the Dutch malthouses are either in hands of the large breweries or cannot compete with the quality of Belgian or German malthouses. Moreover, the Netherlands has never been completely self-sufficient in its materials for beer production, as the areal of the Netherlands is too small to produce enough to meet the needs of all its breweries. Therefore, most suppliers of the breweries were never entirely local, and most breweries will probably never be able to entirely localize this part of the supply chain.
In comparison to the upstream supply chain, the downstream supply chain was very local. Almost all the breweries sold their beers near-exclusively in their own municipality or province. This was both out of necessity – as distributing their beers nationwide or internationally was often not viable or possible – and because this gives them an advantage over other breweries: it allegedly creates loyalty among locals and allows them to provide better service to their clients.

Contacts with other breweries were often informal, and mostly comprised sharing knowledge. These contacts were not limited to their own place or region, and most breweries have networked with breweries throughout the country. This relative ‘openness’ among microbreweries was caused by the fact that most breweries do not see each other as competitors, but as comrades in the process of creating awareness of the craft beer movement. However, many expect that competition will increase in the future due to saturation of the market.

The majority of the breweries also cooperated with other producers of other regional products, mostly on an informal basis. Often, they sold or promoted each other’s products, and sometimes even made products together. Not only was this type of cooperation mutually beneficial, but it also reinforced their image as a local and authentic craft businesses. For the same reason, some also cooperated with local museums and artists. Moreover, many breweries organized brewery tours and brewing master classes and presented their kettles upon entry of the brewery in order to reinforce their image as transparent, artisanal and historic centers of craftsmanship.

Most participants had a positive or neutral attitude about the municipality, stating that it encouraged the establishment of their brewery as it acknowledged that their brewery could potentially attract tourists and stimulated the local economy. However, zoning plans are often not accommodating for microbreweries, and municipalities that see the first brewery settling in their territory often did not know how to deal with them. This slows down the process of establishing a brewery, but for most this was not a serious obstacle. Only two breweries experienced serious opposition from the municipality, which they explained as being the result of a lack of knowledge and their efforts to be autonomous.

In conclusion, five factors have been identified that attach microbreweries to their village or city and inhibit relocation to another place:

1. The brewery founder(s);
2. Place branding: the usage of place in the name of the brewery and its products;
3. Outlet: selling products exclusively on the local or regional market;
4. Product types;
5. Networks with other local initiatives.

Breweries are generally not attached to place when it comes to the upstream supply chain. Although some used barley from a provincial farmer and grew some of their hops themselves, none of the breweries could entirely source their input materials from their own place, province or country and process them there. Therefore, when utilizing the definition of regional products that Streekeigen Producten Nederland uses, we cannot consider Dutch microbreweries to be producers of regional products, as most microbreweries are hubs of transnational - or even global - commodity chains. Therefore, although there were many aspects that tied microbreweries to their place of establishment, most breweries were not entirely local.
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CHAPTER 1: INTRODUCTION

PROJECT FRAMEWORK

At the end of the 1970s, the diversity of beer in the Netherlands was at an all-time low. Fierce competition and mergers resulted in domination of the beer market by a select number of beer corporations, which mostly produced Pilsner beer in massive quantities (Nederlandse Brouwers, n.d.). As a result, the country that counted 657 breweries in 1890 saw the number of breweries dipping below 20 at the start of the 1980’s (Skelton, 2014, p. 5, 8). With this pattern, the Netherlands followed the rest of the world down the path of globalization, where beer production shifted from local breweries to global beer firms. In 2012, the four largest beer concerns – Ab InBev, SABMiller, Heineken and Carlsberg – together produced more than half of the volume of beer sold globally and accounted for more than 70 percent of all revenues. If one compares this to 2005 – when the ten biggest firms produced less than half of the volume of beer sold worldwide – one could conclude that the Dutch beer market is still becoming increasingly homogeneous (Howard, 2014, p. 155). However, contrary to this trend, the number of small breweries in the Netherlands – known as microbreweries or craft breweries - has been increasing since the 1980s and has skyrocketed in the post-recession period after 2008, as seen in figure 1.

Figure 1: Number of Dutch breweries per year (Cambrinus, April 2015)

As a result, the Dutch beer market has become more open to competition and welcomed a great many new beer styles, making the Dutch beer market more diverse. Microbreweries – see text
Box 1 - produce a wide range of ‘craft beers’, which are produced in small batches and have more unique flavors than regular beers (Schnell & Reese, 2003, p. 46). The beer production process is described in text box 2. The diversification of the Dutch beer market can be seen in figure 1, which shows that the number of microbreweries in the Netherlands has grown tenfold in the last 30 years: from roughly 30 breweries in 1985 to 316 in July 2015. This number consists of 173 brewers with their own brewery, and 142 so-called ‘contract brewers’: brewers that do not own their own brewery, but use the brew installation of another brewery. (Centraal Bureau voor de Statistiek [CBS], 2015; Cambrinus, 2015)

**Text box 1: Defining microbreweries**

Coined at the end of the 1970s in the United Kingdom, the term microbrewery generally indicates a brewery that produces a limited amount of beer, usually for the local market (Oliver & Colicchio, 2011, p. 270-271). The concept of a microbrewery is quite ambiguous, as there is no universally accepted definition of its exact meaning. For example, the American Brewers Association defines a microbrewery as a brewer producing fewer than 16,500 hectoliters of beer annually (Oliver & Colicchio, 2011, p. 811), whereas Maier (2013, p. 136) sets the bar as low as 1,000 hectoliters per year. According to Maier, a brewery - in the Czech Republic - must fit the following criteria in order to be considered a microbrewery:

1. Production of no more than 1,000 hl/year;
2. Does not have its own distribution network;
3. Does not export its products;
4. Its products are not available in standard stores;
5. Most of its production is usually consumed in its own restaurant and bar premises;
6. It is not owned by a larger company, with the owner usually one person, or a legal entity made up of a small number of people;
7. The owners are not just involved economically in the sector, but are also enthusiasts;
8. The business strategy is not just dependent on economic interests;
9. Beer is rarely bottled in glass bottles; PET plastic bottles are much more commonly used.”

Some scholars use the term ‘nanobrewery’ - both as a synonym for a microbrewery and as a type of brewery even smaller than a microbrewery - which muddies the waters even further. Woodske (2012, p. 5) defines a nanobrewery as a brewery employing no more than three people operating on a brewing system with a capacity no higher than 3,5 barrels (roughly 411 liters), which usually sells its beer within a 25 mile radius of the brewery and is mostly self-financed. Kleban and Nickerson (2011, p. 35) offer a broader definition for nanobreweries: breweries that operate at a slower pace than microbreweries and have a volume output of less than 30 barrels of beer per year.

For the Netherlands, the umbrella organization ‘Nederlandse Brouwers’ (n.d.) of the eight largest brew firms in the Netherlands – who together produce 95 percent of the total volume of sold beer – regards all breweries not belonging to this organization as microbreweries. Because the definition of the term microbrewery seems to vary greatly between different authors and countries, a broader, more qualitative definition of the term will be used to avoid the possible use of insufficiently justifiable criteria. In this research, a microbrewery is defined as a brewery that primarily produces beer for the local market, which is the norm for microbrewers, as they tend to leave national and international markets to midsize and large breweries (Patterson & Pullen, 2014, p. 175, 193; Flack, 1997, p. 40-41).
Text box 2: the brewing process

Most beers are made using four basic ingredients: water, barley, hops and yeast. Water comprises 90 to 95 percent of beer. Aside from water, barley is the most important ingredient, far outweighing hops and yeast. When barley is harvested, however, it is not yet ready to be used in beer. First, it needs to be malted at a malthouse. This process consists of three steps: steeping, germination and kilning. In these three steps, the barley is first soaked in water (steeping), after which it is allowed to germinate in order to bring about desirable chemical and physical changes in the kernel. Subsequently, further growth is stopped by drying the barley (kilning). The final product is malt, which is then sent to the brewery and ready to be used for brewing. (Hardwick, 1994, p. 88; 115)

At the brewery, the malts are crushed, which allows the starches of the malts to be released. Subsequently, the crushed malts are dissolved in water and heated, causing the starches of the malts to be turned into sugar. The next step is lautering, where the malt residues are filtered from the liquid, which results in a sugary, clear grain digestate called wort. Next, the wort is boiled. In the process of boiling, hops are added to the brew in order to improve the taste and preservability of the beer (Fritschy, 2015, p. 41). Many microbreweries use different kinds of hops for different beers, as there are more than 120 hop varieties that all have their specific gustatory qualities (NRC, 2014; Hop Union, 2013). When the boiling process is finished, the conglomerated proteins and hops are filtered from the wort. Following this process, the wort is cooled to drive off undesirable chemical compounds. Subsequently, yeast is added to the liquid together with air so that the yeast can reproduce. This is the start of the fermentation process, where the yeast converts the sugars into alcohol and CO₂. After primary fermentation, the same process is repeated in the lagering phase, where the beer is aged in airtight barrels or tanks in order to carbonate and flavor the beer. Finally, the yeast is filtered from the beer, resulting in a clear liquid called beer. Alternatively, some of the heavier craft brews – such as trapist beers – are not filtered but pasteurized, leaving the yeast in the beer. Now, the beers are ready to be either kegged, canned or bottled and can be shipped to the consumer (Hardwick, 1994, p. 91-92; Fritschy, 2015, p. 41). For a visual overview of this process, see appendix A.

Remarkably, similar trends have been witnessed by scholars in other parts of the world, such as the United States, Japan, Australia, Canada and the Czech Republic (Patterson & Pullen, 2014, p. vii; Maier, 2013, p. 135). In the United States, the number of breweries increased from 89 to more than 3000 between 1979 and 2014 (Brewers Association, 2014). As figure 2 on the next page shows, the number of large breweries in the US is still dwindling as a result of increasing competition and mergers, but simultaneously there is a proliferation of microbreweries that produce craft beer.
Congruent to the influx in the number of microbreweries, consumer-demand for craft beer in the Netherlands is still increasing (Horecamakelaars Nederland, 2012). The recent surge in craft beer consumption is quite conspicuous, as the mean beer consumption per capita in the Netherlands has been decreasing in the last years, partially as a result of the economic crisis (Nederlandse Brouwers, 2013a; Nederlandse Brouwers, 2013b). This apparent resistance of the craft beer sector to the economic crisis – which seemingly has even been beneficial to the sector – has attracted the attention of large brew firms, but these have for the most part not dabbled in the craft beer market (Skelton, 2014).

Simultaneous to the increase in craft beer production and consumption, other local, small scale food production and craft work initiatives have mushroomed as well (Thurnell-Read, 2014, p. 46). One example is the urban agriculture movement, which seeks to relocate and re-embed agriculture in the urban environment, and has drastically expanded in nearly all parts of the world since the 1980s (Mougeot, 2010, p. 2). Similarly, the Slow Food movement - initiated in Italy in 1986 after an attempt to prevent the opening of a McDonald’s branch in Rome – stresses the use of locally produced ingredients and rejects globalization by favoring traditional cuisine to transnational standardized cuisine (Eriksen, 2014, 181-182). The microbrewery movement thus seems to be part of some bigger trend.
The most recurring explanation is that it is an expression of neolocalism: an increasing demand for unique and local products and places that stems from the increasing homogeneity of products and places as a result of increasing globalization (Flack, 1997, p. 38; Schnell & Reese, 2003, p. 65-66). Although global interconnectedness has been increasing in last centuries due to colonialism, mass media and cheaper and faster travel, it has been increasing at unprecedented rates in the last decades. The fall of the Soviet Union in 1989 led to a replacement of the existing global two-bloc system - the divide between communist and capitalist countries - with a one bloc system: a world with a single marketplace and geopolitical arena. In combination with the rising ubiquity of new communication technologies such as the Internet, these developments have enabled the rise of global corporations, the standardization of goods, services and places and have led to growing consciousness about the world as a whole (Eriksen, 2014, p. 3-5). In return, part of the general public has become disillusioned with these processes of globalization and corporatization that condition the modern society. Therefore, some local food movements can be seen as spatial manifestations of anti-globalization sentiments (Schnell & Reese, 2003, p. 46-47, 59, 61, 66). The consumer wants to be reconnected with the local, the place which a person finds him- or herself in, and local craft beer might just be a means to do that. According to Schnell and Reese (2014, p. 193), most microbreweries have played into this desire by using branding and marketing strategies that empathize their connection with a certain place and have for this reason consciously suppressed their geographical expansion, as practice has shown that this is an unsuccessful business strategy for most microbreweries. Indeed, when looking at efforts by larger brew firms to purchase existing successful microbreweries, there is a long list of failed attempts to upscale local microbreweries into mass-producing factories (Carroll & Swaminatan, 2000, p. 725-732; Schnell & Reese, 2014, p. 196). As Mike Foley, president of Heineken USA noted: "People are looking for something very different as part of a behavioral statement. With a micro, they're not drinking a brand at all, but an idea". This idea is the connection to a certain place (Schnell & Reese, 2003, p. 48). Only a few microbreweries have successfully expanded their market scope, and these tend to be the breweries that have no sort of place branding (Schnell & Reese, 2014, p. 193).

Now, a growing number of individuals and businesses attempt to create, recreate and improve their local ties, identities and economies in the wake of globalization (Schnell, 2013, p. 56). This establishment of local ties is no longer a result of necessity, but of choice. Microbreweries can do this by emphasizing their connection to a place through images and brand names that are based on local places, histories, heroes, folklores and myths, thus connecting consumers with the symbolic place-consciousness of the region (Hede & Watne, 2013, 210-211; Schnell, 2013, p. 57). This is known as place branding (Atzema, Van Rietbergen, Lambooy & Van Hoof, 2012, p. 131).

Inspired by the research of Flack (1997), Carroll and Swaminatan (2000) and Schnell and Reese (2003; 2014) into consumer demand for local beer, this study aims to find out how local microbreweries are. For this, I use the theory of place attachment as an anchor point, and focus on the different dimensions of place attachment: place identity, place dependence and social bonds. For a better fit with the object of study, these three dimensions have been interpreted with organizational identity formation theory, location theories and network theories respectively. This will hopefully contribute to the body of knowledge about microbreweries and their relationship with place.
1.2 RELEVANCE OF STUDY

Despite the rapid growth of the microbrewery movement in the Netherlands and beyond, only a handful of scholars has investigated microbreweries. For the Netherlands, literature about microbreweries is almost non-existent. As far as is known, only two studies have been conducted that touch upon this subject. The first study by De Jongh, Peters and Teeffelen (2014) is a quantitative study of the consumption and experience of beer by consumers, and includes a demographic analysis of consumers of local craft beer. The second study is a qualitative study of the process of identity formation by microbreweries (Kroezen & Heugens, 2012). In addition, some non-scientific publications have been made, but altogether, the body of literature remains small. In addition, the research area into broader, overarching themes such as regional products, local food production and anti-globalization movements is also still in its infancy, gaining only widespread interest of scholars in the 1990s (Schnell & Reese, 2003, p. 46; Blake, Mellor & Crane, 2010, p. 411; Eckhardt & Mahi, 2012, p. 281). In the field, no research has yet explicitly focused on place attachment of local food producers. Therefore, a study oriented at microbreweries in the Netherlands and their relation with place has a high scientific relevance: it helps to close the gap in the literature about microbreweries and it can pave the way for more research into local, sustainable food production initiatives. In addition, by applying place attachment theory to firms such as microbreweries, the elasticity of place attachment theory – which is mostly applied to individuals - can be further explored.

Next to scientific relevance, this research could also have societal relevance. Microbreweries have – especially during the economic crisis – proven to be significant stimulators of the local economy, as they create new jobs and through local production and consumption stimulate the local circulation of capital (The Brewers of Europe, 2013, p. 178; Grunde, Li & Merl, 2014, 26-29; National University System Institute for Policy Research, 2015). Therefore, more insight into the dynamics between microbreweries and their place of establishment could help policy makers to create policies that accommodate for microbreweries, thus ensuring further economic growth.

1.3 RESEARCH AIM(S)

By now, it is clear that this research is oriented more towards theory than practice: rather than developing a solution to a problem, it is meant to both give insight into microbreweries in the Netherlands and to strengthen the existing body of theory about the subject. This research will focus on microbreweries from the perspective of the brewers themselves, and will try to reveal and theorize the relationships of breweries with place. This leads to the following research aim:

The aim of this study is to gain in-depth understanding of the way in which microbreweries are attached to their localities.
1.4 RESEARCH MODEL

![Research Model Diagram]

Figure 3: Research model (own work)

(a) Using the framework of place attachment, organizational identity theory, location theories and network theories will be employed and form the input for the (b) data collection on microbreweries. Next, the data is analyzed (c), which ultimately leads to a conclusion about microbreweries and their attachment to place (d).

1.5 RESEARCH QUESTION(S)

Central question:
How and to what extent are microbreweries attached to their place of establishment?

Sub-questions:
In order to answer the central question of this study, we must first know where the boundaries of the term microbrewery lie and whether the founders of the studied microbreweries consider their own brewery to be a microbrewery. As stated earlier, there have been made several definitions of the term 'microbrewery' in other countries, but a definition has yet to be made for the Dutch context. Therefore, when studying the place attachment of Dutch microbreweries, one must first define the subject of study that is attached to place, which forms the basis for sub-question 1. Next, in order to study place attachment, a rather broad and abstract term, has to be split up in more narrow, concrete sub-dimensions. On the basis of the place identity framework provided by Raymond et al. (2010), place attachment has been split up in three sub-dimensions: place identity, location factors and networks. These dimensions formed the basis for sub-question 2, 3 and 4, and are further elaborated on in chapter 2.
1. How do brewers define microbreweries?
2. How are the identities of microbreweries connected to their place of establishment?
3. Which localization factors determine the connection of microbreweries to a place?
4. To what extent are microbreweries embedded in local networks?
CHAPTER 2: THEORY

2.1 THEORETICAL FRAMEWORK

In order to interpret the gathered data and to build further on existing social theories, relevant theories and data must be explored first. The next section will elaborate on theories, concepts, hypotheses that have been developed.

2.1.1 PLACE ATTACHMENT

In the last decades, place attachment has increasingly attracted the attention of scholars in field of environmental psychology, human geography, sociology and others. In part, this is the result of globalization, increasing mobility and environmental problems, which have made the connections of people to places more fragile. However, since the concept of place attachment has been used in such a wide range of disciplines, it has been defined and operationalized in many different ways, which puts it in danger of becoming a nebulous container term (Williams & Vaske, 2003, p. 831; Raymond, Brown & Weber, 2010, p. 422; Scannell & Gifford, 2010, p. 4).

In the field of geography, place attachment has been studied by scholars using the humanistic geography approach, which was developed by scholars such as Edward Relph (1976) and Yi-Fu Tuan (1977). In this discipline, the concept of place refers to a unique space that humans assert certain meanings to (Tuan, 1977). Place attachment – often used interchangeably with the term sense of place - not only refer to the spatial characteristics of a place that can be perceived, but also to the meanings, attitudes and feelings that people share about a locality (Knox & Marston, 2012, p. 25). These shared meanings, attitudes and feelings are part of the ‘lifeworld’: the taken-for-granted pattern and context of everyday living through which people conduct their lives. Through shared experiences and social encounters in bars, parks, shops, restaurants, schools and markets, a group of people located in space develops unique routines, dress codes, humor, gestures, vocabularies and speech. In other words, people derive shared meanings from everyday practices – known as intersubjectivity - and attach these meanings to places (Knox & Marston, 2012, p. 26).

Williams and Vaske (2003, p. 831) understand place attachment as a term consisting of two dimensions: place dependence and place identity. Place dependence refers to the functional attachment to a place: the importance of a place in providing conditions and features that support specific goals or desired activities. In contrast, place identity is an emotional attachment to a place, and refers to the symbolic importance of places as containers of relationships and emotions that give meaning and purpose to life.

In figure 4, Scannell and Gifford (2010, p. 2) have attempted to integrate the different definitions of place attachment into one framework consisting of three dimensions. The first dimension is the person dimension, which indicates the actor attached to the place. This can be an individual as well as a group or culture. Secondly, the process dimension describes the interactions between the actor and a place, and the nature of these relations (Scannel & Gifford, 2010, p. 3). In this, they identify three components that manifest themselves in place attachment.
as a process: affect, cognition and behavior. Affect refers to the feelings and emotions attached to a place by an actor. Cognition comprises the knowledge an individual has of a place in the form of memories, information and meanings concerning that place. The third aspect, behavior, refers to proximity-maintaining behavior to the attached place, how the actor reconstructs places and how the actor behaves when relocating to a new place (Scannell & Gifford, 2010, p. 4). Lastly, the place dimension points to the object of attachment and its characteristics (Scannell & Gifford, 2010, p. 2).

![Figure 4: Tripode model of place attachment (Scannell & Gifford, 2010, p. 2)](image)

Differently from Scannell and Gifford (2010), Raymond et al. (2010, p. 425-426) distinguish four dimensions of place attachment, which can be seen in figure 5. The model does not view the psychological process as a separate dimension (Raymond et al., 2010, p. 426). It separates the person dimension in place identity and place dependence. The place dimension is separated in social bonding and nature bonding. However, nature bonding might not be applicable in some studies, such as those conducted in urban and peri-urban settings, and is mostly used when studying attachment to the natural environment (Raymond et al., 2010, p. 425, 432). When studying place attachment of microbreweries in the Netherlands, which are often located in highly populated urban and peri-urban settings, this dimension is not very suitable (Zasada, Loibl, Berges, Steinocher, Köstl, Piorr & Werner, 2013, p. 61). This leaves a three-dimensional model of place attachment consisting of place identity, place dependence and social bonding; a model that has been employed by scholars such as Kyle, Graefe & Manning (2005, 155-157).
Place attachment has been studied on several levels: the home or workplace, the neighborhood, the city, the region, the country or even the planet. In other words, the places that people are attached to vary in scale, tangibility and specificity (Hidalgo & Hernandez, 2001, p. 274-275). This study will focus on the attachment of microbreweries to both the location of the brewery and to the place in which the brewery is located.

In conclusion: when studying place attachment, the scientific discipline, the place and the object of study determine how the researcher operationalizes the concept. The model of Raymond seems to be the most solid, as it – in addition to place identity and place dependence - also takes in account social bonding, which several studies have shown to be a statistically significant component of place attachment (Stedman, 2006; Mesch & Manor, 1998). In the next paragraphs, place identity, place dependence and social bonding will be further explored and operationalized.

### Figure 5: Operationalized definitions of the four dimensions of place attachment (Raymond et al., 2010, p. 426)

<table>
<thead>
<tr>
<th>Pole</th>
<th>Construct</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal</td>
<td>Place identity</td>
<td>Those dimensions of self, such as the mixture of feelings about specific physical settings and symbolic connections to place, that define who we are.</td>
</tr>
<tr>
<td></td>
<td>Place dependence</td>
<td>Functional connection based specifically on the individual physical connection to a setting; for example, it reflects the degree to which the physical setting provides conditions to support an intended use.</td>
</tr>
<tr>
<td>Community</td>
<td>Social bonding</td>
<td>Feelings of belongingness or membership to a group of people, such as friends and family, as well as the emotional connections based on shared history, interests or concerns.</td>
</tr>
<tr>
<td>Environment</td>
<td>Nature bonding</td>
<td>Implicit or explicit connection to some part of the non-human natural environment, based on history, emotional response or cognitive representation (e.g., knowledge generation).</td>
</tr>
</tbody>
</table>

2.1.2 PLACE IDENTITY

Place identity is defined as the process of interaction with a place that leads to identification with said place (Hernández, Hidalgo, Salazar-Laplace & Hess, 2007, p. 310). Over time, a person builds up an environmental past: a past of places, spaces and their properties which have served instrumentally in the person’s biological, cultural, psychological and social needs. Through this interaction, the person develops memories, feelings, values, preferences, meanings and conceptions about the place with which he or she interacts. This, in part, shapes the identity of an individual, and how he or she interacts with the surrounding environment. Hence, place identity is strongly related to residential history, and place and identity are intertwined in a symbiotic relationship (Raymond et al., 2010, p. 425; Proshansky, Fabian & Kaminoff, 1983, p. 59-60).

Given the fact that there is no single operationalization of place identity and the concept is mostly aimed at individuals and groups, I have slightly altered the concept for a better fit with organizations and firms. Here, I look at the ways in which place is reflected in the organization’s identity. In their study on organizational identity formation, Kroesen and Heugens (2012) found
that organizational identity is formed both by external forces - the organization’s environment - and organizational insiders (p. 58), as shown in figure 6. They defined organizational identity as “a set of multiple identity claims that are developed through processes of collective sense-making and sense-giving against an institutional background”. These identity claims are statements about what is central to the organization, as well as what its enduring and distinctive characteristics are (p. 11-12). Identity claims are supported by proto-identity attributes, which are the material and symbolic fundamentals of the organization and the formal and informal organizational practices, such as the business model, strategies and conventions of the firm (p. 21).

Kroezen and Heugens (2012) identified three important identity sources: ‘authoritative insider identity’, ‘audience preferences and social judgement’ and ‘organizational peer identities’. These sources continuously shape and reshape the proto-identities of organizations, which subsequently flow into the organizational identity reservoir: the set of proto-identities that an organization has (p. 21). From the identity reservoir, the organization draws identity claims, a process which they name identity enactment. This results in an enacted organizational identity, which comprises the set of identity claims that an organization employs in social interaction (p. 12). In turn, this set of identity claims determines which proto-identities are selected from the identity reservoir (p. 21).

In this study, we will look at how microbreweries enact claims related to place in their identities. For this, we look at how microbreweries employ place in their branding, such as the use of place in the name of the brewery, in the name of the products and in the story they tell. Moreover, we look at how this place identity is formed. Here, we do not only look at external factors – such as the market – but also at the personal identity of the brewery founder, as the founders of a firm can usually exercise much influence on the identity of the firm (Kroezen & Heugens, 2012, p. 43-45).
2.1.3 PLACE DEPENDENCE

The aforementioned place dependence was defined as the functional dimension of place attachment: it refers to the degree in which the place supports the goals set by the actor. For this study, place dependence is defined as the set of location factors that are deemed important by microbreweries in the process of choosing their location of establishment. In this paragraph, the literature about how and why entrepreneurs choose a location will be explored.

In economic geography, location theories are concerned with explaining why economic activity happens in a certain place, and study the locations of economic actors and the interactions that happen between them (Atzema et al., 2012, p. 11, 20). Within the discipline, there are several location theories that attempt to explain why entrepreneurial activity emerges in certain localities. These can be divided in two traditions: homogenizing and particularizing. The first tradition is the homogenizing approach, which aims to establish fixed laws of entrepreneurial location choice (Atzema et al., 2012, p. 18). This approach is based on the notion that firms choose their location rationally by using a cost-minimizing strategy, taking into account distance transaction costs and location specific factor efficiency costs. Ultimately, a firm will choose a location with an optimal mix of these location factors. The second tradition is the
particularizing approach. In contrast to the former approach, it argues that forming laws for location choice is not possible. New firm formation is context dependent: in addition to economic factors, socio-psychological and cultural variables determine new firm formation and location choice (Crevoisier, 1999; Schutjens, Mackloet & Korteweg, 2006, p. 5). In the two approaches, there are several different schools of thought.

Within the homogenizing tradition, we can differentiate between classical and neoclassical location theories. Both theories share the assumption that entrepreneurs are fully informed and rational actors – the homo economicus or economic man – who always try to maximize their profits, and therefore choose the location with both the lowest production costs and the lowest transport costs. Moreover, they have the assumption that space is isotropic, which means that spatial inequalities and barriers such as rivers, infrastructure or cultural barriers are absent (p. 27-28). It is assumed that transport costs increase linearly with the amount of transported goods and the distance to the market (Van Noort & Reijmer, 1999, p. 14). According to classical and neoclassical location theories, new enterprises seek an optimal mix of Standortfaktoren, factors that determine their location choice. These Standortfaktoren are transport costs, labor costs and location factors regarding agglomeration and deglomeration. Classical location theorists argue that firms will ultimately settle on the location that has the lowest production costs, whereas neoclassical location theorists assert that they will settle on the location that allows for profit maximization (Jovanović, 2008, p. 10).

The location theories belonging to the particularizing tradition were a reaction to the calculated approach of classical and neoclassical location theories, and do not view individuals as fully informed and rational actors. Instead, individuals act on the basis of the information that is available to them. This is what Herbert Simon (1972) called bounded rationality: individuals cannot make fully rational decisions, as this would require them to identify and rank all possible alternatives and their effects on their desirability in reaching the set goal. Due to limited time and high research costs in relation to the gained advantages, he views this as undesirable, if not impossible, to do. Rather, they are docile: people rely on information, suggestions and recommendations supplied by social contacts as the basis for their decisions.

Behavioral location theories – in contrast to (neo)classical location theories – assume that actors do not necessarily strive to maximize their profits: people are seen as satisficers instead of optimizers. This means that when a decision leads to satisfaction – even if the result is not optimal – they do not strive for further optimization (Atzema et al., 2012, p. 64). The same argument goes for location: because people are satisficers, entrepreneurs have broad margins regarding locations, and can settle in many different locations (Atzema et al., 2012, p. 98). However, entrepreneurs are often inclined to value nearby places that they are familiar with higher than distant places that are unfamiliar, a phenomenon known as the neighborhood effect. This is because they have more knowledge about their own localities than about others (Atzema et al., 2012, p. 72). Due to the fact that the founders have built up networks and have knowledge about the area, a firm usually settles near the neighborhood of the founder or the place where he or she has previously worked at the start-up phase of a firm (Schutjens, Mackloet & Korteweg, 2006, p. 5; Boschma & Lambooy, 1999, p. 414).

Closely related to the behavioral approach is the evolutionary approach, which also assumes that entrepreneurs have bounded rationality, are not always looking for the most optimal location (Atzema, 2012, p. 98-100). At the start, firms are not picky about their location. However, in addition to behavioral theories, the evolutionary approach stresses the importance of history in the locational preferences of the firm. Shock events can force a firm to take action and relocate, while past investments and networks may urge a firm to stay at its current
location. However, there is no predictable optimal location for a firm, as this is context-dependent. Location choice is dependent upon adaptation, inheritance and chance: firms initially make quite random decisions, and only find out later if this location falls within the spatial margin of profitability and have to adapt or relocate if this is not the case (Jovanović, 2008, p. 3-4).

Lastly, the institutional approach argues that locational preferences of firms are shaped by institutions: economic, social and political rules (Marinescu, 2012, p. 254). Central to this approach is the notion that transaction costs and transaction-specific investments play a crucial role in the process of choosing a location. Firms buy their input and productions factors on the market, and are also inclined to outsource marketing and distribution. In the process of engaging with the market, the entrepreneur makes transaction costs and transaction-specific investments, which they always try to reduce. However, there is always uncertainty as to whether everyone will play by the rules of the game. For this reason, enterprises seek to settle near their most important suppliers and knowledge networks. This is known as embeddedness: minimizing distances between people has positive effects on trade. With geographical proximity come relations of trust and lower transaction costs. In the institutional approach, location choice is most dependent on the strategy of the firm. The location that corresponds the most with the general strategy of the enterprise is by this assumption the most favorable location (Atzema et al., 2012, p. 89). Hence, location follows strategy.

Perhaps, location choice and place dependence can be most aptly described with the push-pull-keep paradigm. Push factors are negative aspects of a firm's location that force them to leave their localities, such as factors that limit profitability and growth. Pull factors are the positive aspects of another location that stimulate the firm to move from its current location, such as opportunities to obtain greater economic gains. Lastly, keep factors comprise the aspects that discourage the firm from leaving its current location (Schutjens, Mackloet & Korteweg, 2006, p. 8). When keep factors are lower than the push and pull factors, a firm relocates. Therefore, we can conclude that keep factors form a brewery's physical attachment to place (Schutjens, Mackloet & Kortweg, 2006, p. 9). However, keep factors are more difficult to study than push- and pull factors. They can only be studied when respondents are confronted with a hypothetical situation (Schutjens, Mackloet & Korteweg, 2006, p. 9). Therefore, the participants of this study were asked about the positive and negative aspects of their location, why they settled on their location, what other locations they were located on, why they moved and if they see their own location as permanent. In addition, they were asked where they would like to settle if they could place their brewery anywhere they liked.

### 2.1.4 SOCIAL BONDING AND NETWORKS

Empirical evidence - mainly from urban sociology - shows that social bonds form an important component of place attachment (Scannel & Gifford, 2010, p. 4). Individuals and organizations are tied to a location by formal and informal networks. In entrepreneurial organizations, the founders are often responsible for the firm’s networks (McGrath & O’Toole, 2013, p. 1143). Small firms usually have little financial resources to innovate and to export their products. Therefore, through small social-cultural distances, local networks that are built on trust emerge.

For production systems, the commodity chain forms an important component of their network (Maye, 2012, p. 475). Commodity chains are formed by nodes of production, distribution, consumption and the links between them, together with social, cultural and natural
conditions involved in commodity movements (Hartwick, 1998, p. 425). Therefore, when studying microbreweries, it is important to look at their relationships with the upstream supply links, which include farmers, malt houses and wholesalers of raw materials, and downstream supply links (Maye, 2012, p. 477-479). According to Kleban & Nickerson (2011, p. 35), these downstream supply links can take three forms:

- Brewery → Wholesaler → Retailer → Consumer
- Brewery as Wholesaler → Retailer → Consumer
- Brewery (As a Bar/On-site Tap sale) → Consumer

Next to relations with producers and consumers, one can look at the other formal and informal contacts a brewery has, and how local these are. We can look at the amount of contact with competitors (e.g. other breweries), contacts with the local government and contacts with other local companies and initiatives.

### 2.2 CONCEPTUAL MODEL

The framework by Raymond et al. (2010) in combination with the posed research aims and research questions leads to the following conceptual model:

![Figure 7: Conceptual model (Own work)](image)

In the previous paragraph, the concepts of ‘place identity’, ‘place dependence’ and ‘social bonding’ have been interpreted as the use of place in the enacted organizational identity, location factors and localness of the brewery’s networks. This was done in order to get a better fit with the object of study. Place identity has been operationalized with the indicators ‘identity of brewery founder’, ‘brewery name’, ‘product names’, ‘product types’ and ‘marketing’. Place dependence has been operationalized using ‘pull factors’, ‘push factors’ and ‘keep factors’. Lastly, the dimension social bonds or networks has been operationalized as ‘upstream supply chain’, ‘downstream supply chain’, ‘relations with other breweries’, ‘relations with other local initiatives’ and ‘relations with local government’. This operationalization can be seen in figure 8 and formed the basis for the interview guide that can be seen in appendix C.
Identity of brewery founder
Brewery name
Product names
Product types
Marketing

Place identity:
Place in enacted organizational identity

Pull factors
Push factors
Keep factors

Place dependance:
Location factors

Place attachment

Upstream supply chain
Downstream supply chain
Relation with other breweries
Relation with other local activities
Relation with local government

Social bonds:
Networks

Figure 8: adapted and operationalized conceptual model (Own work)
CHAPTER 3: METHODOLOGY

In this chapter, the ways in which the research has been conducted will be discussed. First, the research strategy will be explained, followed by an assessment of the research material that was used for the study and how the data was analyzed.

3.1 RESEARCH STRATEGY

According to Verschuren and Doorewaard (2007, p. 161), there are five types of research strategies:

1. Survey;
2. Experiment;
3. Case study;
4. Grounded theory;
5. Desk research.

When choosing a research strategy, there are three considerations that have to be made (Verschuren & Doorewaard, 2007, p. 164):

a) Is the research broad or in-depth?
b) Does the research subject require quantitative or qualitative research?
c) Does the researcher have to conduct empirical research and collect data, or is there already sufficient data available to answer the research question?

For this research, a qualitative and empirical study was conducted that is both broad and in-depth. First, a qualitative approach was chosen out of necessity, since practically no research has yet focused on the place attachment of microbreweries. According to Creswell (2007, p. 39-40), qualitative research is the more useful approach when an issue has not yet been explored by other research, as quantitative studies usually require some hypotheses and background knowledge about the subject. Secondly, the research question is partially about gaining in-depth understanding of the way in which microbreweries are attached to their localities, which makes qualitative research more suitable in the process of answering the research question. However, it also has characteristics of a broad study, as I attempt to create a general framework for place attachment of microbreweries. Lastly, little data is currently available on the subject of microbreweries and their attachment to place, making empirical research a necessity (Verschuren & Doorewaard, 2007, p. 162-164).

By now, we have excluded the survey, the experiment and desk research from the list of viable approaches. The survey and experiment are ineffective for answering the research question, as they are both primarily quantitative in their nature. Desk research is also unsuitable for this research, because there is little data available on the subject (Verschuren & Doorewaard, 2007, p. 165). Therefore, only the case study and grounded theory qualify as possible research strategies.
Arguably, a case study fits the objectives of the research better, because the goal is to gain insight into the ways in which microbreweries are attached to place by studying several microbreweries, and not necessarily to produce an abstract, analytical theory that can be a framework for further research, as is the case with grounded theory (Creswell, 2007, p. 63). Moreover, grounded theory is a very time consuming method, as it usually requires very large sample sizes and multiple steps of coding. Creswell (2007, p. 64) argues that the researcher has to conduct between 20 and 30 interviews, and Morse (1994, p. 225) even sets the bar at 30 to 50 interviews. Given the limited time-span available to conduct this study, following these requirements would be near impossible. Therefore, the case study seems to be the most usable approach.

A case study is oriented towards diagnosis or evaluation of a specific situation, where the researcher attempts to gain in-depth insight in one or several cases in a specific time and spatial setting (Wester & Peters, 2004, p. 35). Here, we attempt to explore the attachment of a type of firm – the microbrewery – to the location of establishment as well as the city in which it is located. This can be done using one of two methods. One can choose between studying a single case or multiple cases (Creswell, 2007, p. 73-74). Since the objective for this research is not only to gain in-depth insight in place attachment but also to obtain more generalizable findings, a case study involving multiple cases seems to be the best option. To maximize the generalizability of this research, I have attempted to include as many cases as possible.

Although case study research is the most usable approach for this study, there are still some problems when following this approach. First and foremost, case studies usually require the researcher to use multiple methods of data gathering (e.g. interviews, documents, questionnaires), known as methodological triangulation (Creswell, 2007, p. 73; Denzin, 1970). In this study, methodological triangulation is obstructed by the fact that information about Dutch microbreweries is near void. Where possible, I have attempted to use other forms of data – such as the websites of the breweries and official documents – but for the most part, this study relies on interviews. Data triangulation is possible by conducting multiple interviews, but the collected data cannot always be validated by other sources, which might weaken its validity (Denzin, 1970). Secondly, despite the fact that case studies can be used to generalize from one case to the other, generalization is best done when representative cases can be identified and selected for inclusion in the study (Creswell, 2007, p. 74). However, the definitional quagmire surrounding the term 'microbrewery' impedes the selection of representative cases, because their representativeness can be highly contested. Notwithstanding the aforementioned critiques, I have chosen to conduct a multiple case study as it has the best fit with the objectives of this study.

3.2 RESEARCH MATERIAL

This research has two research objects: people (microbrewery founders) and objects (breweries). The data was collected using semi-structured interviews, which were mostly conducted over the course of one month, April. The selection process started by finding out which breweries there were, where they were located, how they could be contacted, what their year production was and if the brewery's founders were still part of the firm. In order to get this information, I used the website Cambrinus.nl, which is - among others - operated by the secretary of the Klein Brouwerijen Collectief [KBC] (Dutch Brewers Collective) and the publisher
of ‘Bier! Magazine’, a quarterly beer magazine specializing in craft beer. In addition, Tim Skelton’s (2014) guidebook ‘Beer in the Netherlands’, was used for some additional information.

After collecting information about the breweries, they were contacted either by phone or by e-mail. Roughly 80 breweries were approached, of which about 20 responded. The ones that responded but did not cooperate indicated that they lacked the time to participate. This left a total of 12 participating breweries, which can be seen on a map in figure 8 on the next page. Subsequently, 13 interviews were conducted with individuals from these breweries, consisting of 12 brewery founders and one brewmaster, who together had an average age of 42 years. Due to unforeseen circumstances, the founder of Delftse Stadsbrouwerij De Koperen Kat was not available on the day of the interview, but the brewmaster who was present at the time was so kind to stand in and attempted to answer my questions. However, due to the fact that he did not know the underlying reasons for all the decisions the brewery had made in the past, I went back to the brewery in early June, and interviewed the founder of the brewery in order to acquire missing information and discuss my preliminary findings.

The interviews lasted between 37 and 143 minutes, with an average of 72 minutes. An overview of the interview schedule and the breweries can be found in appendix B. For these interviews, the framework of place attachment discussed in chapter 2 formed the basis for the interview guide in appendix C.

There were some challenges along the way. Although the Cambrinus website is regularly updated and Skelton’s book is quite recent, information about breweries can be quickly dated; new breweries can pop up every month, breweries can upscale or downscale their production and breweries can move to other locations. Moreover, some information was plain wrong or missing; which made some facts, such as Oedipus predominantly brewing at other breweries and Twentse Brouwerij producing as much as 6,500 hectoliters annually, come as quite a surprise. Yet, the biggest challenge was the process of identifying which breweries were microbreweries and which were not. Initially, I used the most conservative definition of a microbrewery: a brewery producing less than 1,000 hectoliters annually, primarily for the local market. In spite of this definition, I quickly found myself interviewing a larger brewery due to dated information about the brewery’s annual production level, and discovered that microbreweries cannot be that easily defined, as many breweries with a year production larger than 1,000 hectoliters also consider themselves to be microbreweries, and consider many smaller breweries to be nano-breweries or ‘upscaled hobbyists’.

3.3 DATA ANALYSIS

The collected primary data, consisting of .WAV audio files of the interviews, was transcribed in Atlas.ti, software for qualitative data analysis. Following this process, a within-case analysis was performed on the basis of the collected interview data and the websites of the breweries. Here, each case and its context was described (Creswell, 2007, p. 75), which formed the basis for chapter 4.

Next, the transcripts of the interviews were merged into one file and coded. First, open coding was used. This phase consists of creating annotations about the observed phenomena—memo’s—and formulating central concepts that describe what is being discussed, known as sensitizing concepts (Verschuren & Doorewaard, 2007, p. 196). Next, the codes were related to each other in the network view of Atlas.ti, which ultimately shows the interrelationships
between the concepts (Corbin & Strauss, 1990, p. 13). This stage of interrelating concepts between the cases is known as cross-case analysis, where similarities and differences between the cases are explored and interpreted (Creswell, 2007, p. 75). The outcomes of this analysis can be found in chapter 5. However, since the interviews were held in Dutch, the quotes presented in chapter 4 and 5 had to be translated to English. I have attempted to do this as literally and accurately as possible.
Figure 9: Map of visited breweries (Own work)
In the Netherlands, several terms are used for microbreweries. The most apparent distinction can be made between *brouwerijen* (breweries) and *brouwerijhuurders* (brewery hirers), also known as contract brewers. Regular microbreweries have their own brewing installations, while brouwerijhuurders do not; they pay other breweries for the use of their brewing installations, and thereby hire others' brewing installations (Kleban & Nickerson, 2011, p. 35). In comparison to the other major beer producing countries, the Netherlands has a relatively large number of brouwerijhuurders, which currently comprise roughly half of all the microbreweries in the Netherlands (Skelton, 2014, p. 38, 82). However, the terms are not mutually exclusive, as some microbreweries with their own brewery also brew at other breweries, most often due to a lack of capacity in their own brewery. Other recurring terms in the Dutch microbrewery scene are *dorpsbrouwerij* (village brewery), *stadsbrouwerij* (town or city brewery) and brewpub—where the brewery is part of a restaurant or bar and sells at least 25 percent of its beers on site (Kleban & Nickerson, 2011, p. 35). Lastly, there are what Skelton (2014, p. 38) calls ‘socially conscious breweries’, who offer social services, rehabilitation projects and work to people who are unable to find a job. Examples are ‘De Prael’, which employs people who suffer from mental disability and ‘Stadsbrouwerij Dordrecht’, which employs the socially or educationally disadvantaged. Often, these breweries are not owned by individuals, but are run by non-profit organizations.

The overarching organization that represents the interests of microbreweries in the Netherlands is the Klein Brouwerij Collectief [KBC] (Small Brewery Collective). With over 140 members, roughly half of the microbreweries in the Netherlands are members. The KBC was established in 2003 to protect the interests of the growing number of microbreweries, to promote Dutch beer culture and as a platform where small breweries can form contacts with other breweries and exchange knowledge (NL Bier, 2015). Its antithesis is the organization Nederlandse Brouwers (Dutch Brewers), which represents the interests of the eight largest brew firms in the Netherlands: Heineken, Bavaria, Alfa, Grolsch, Gulpener, InBev, Lindeboom and Budelse (Nederlandse Brouwers. n.d.).

In the following chapter, the 12 microbreweries and brewery founders that have been included in this study will be briefly described. An overview of the included breweries can be seen in table 1 on the next page. For convenience, I have categorized the breweries by their annual production volume: breweries with an annual production of less than 100 hectoliters (paragraph 4.2), breweries producing between 100 and 1,000 hectoliters (paragraph 4.3) and breweries producing more than 1,000 hectoliters on an annual basis (paragraph 4.4).
<table>
<thead>
<tr>
<th>Brewery name</th>
<th>Location of brewery</th>
<th>Year of establishment</th>
<th>Number of year-round beers</th>
<th>Year production (in hL)</th>
</tr>
</thead>
<tbody>
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<td>Den Bosch</td>
<td>2009</td>
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<td>Katjelam</td>
<td>Nijmegen</td>
<td>2014</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>Jonge Beer</td>
<td>Hoogeveen</td>
<td>2014</td>
<td>3</td>
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<td>Delftse Stadsbrouwerij De Koperen Kat</td>
<td>Delft</td>
<td>2011</td>
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<tr>
<td>Oedipus Brewing</td>
<td>Amsterdam</td>
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<td>Twentse Brouwerij</td>
<td>Hengelo</td>
<td>2008</td>
<td>7</td>
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*Table 1: Overview of cases.*
4.2 BREWERIES PRODUCING LESS THAN 100 HL ANNUALLY

4.2.1. DORPSBROUWERIJ DE MAAR (JABEEK)

Dorpsbrouwerij De Maar is situated in Jabeek, a small village of 725 inhabitants in the province of Limburg. The brewery is named after the road on which the brewery is located, Maar, and was established in 2003. In addition to a brewery, De Maar is also a Bed and Breakfast, and has a tasting room with an accompanying terrace in the summer. It is housed into an old farm that stems from 1615, and is adjacent to the Saint-Gertrudis church, which forms the core of the village. The visual properties of the location (see figure 10) are used in the brewery’s logo, which can be seen on the right.

Léon Bemelmans, both the founder and only employee of the brewery, was born in Limburg, but studied electro-technics at Eindhoven University of Technology, where he met his wife. When his wife found a new job in Limburg, they moved back to Limburg and settled in Jabeek. Until recently, Bemelmans worked at his company, Beltech, which was located in Eindhoven, and worked at his brewery in the weekends. Now, he has focused his efforts on developing a bottle-filling machine for the brewery.

Bemelmans’ interest in the beer brewing process was sparked when he went on a brewery tour in the Czech Republic together with five of his friends. This was the start of a tradition: in the next 15 years, he visited more breweries in Europe – both small and large – and started reading on beer brewing techniques, which ultimately accumulated in attempts to brew his own beer together with his friends. When he moved to Jabeek, he had enough space to set up his own brewery, and set it up in the building neighboring his house, as seen in figure 9 on the next page: “For me, a few different tracks came together: an affinity with brewing beer, a desire to have my own brewery and having enough vacant space, for which I did not need to make further financial sacrifices”. At this point, he was the only one of his group of friends who proceeded with brewing beer.

Besides brewing beer, Bemelmans gives lectures on beer brewing and organizes brewery tours. In addition, the brewery takes part in other local initiatives, such as organizing bicycle and walking tours in the area, whereby tourists can visit the brewery, together with a local museum and a castle-hotel (L. Bemelmans, interview, 29 March 2015).
The beers of the brewery are named after places in the region, and are mainly sold in the villages surrounding the brewery. Next to Jabeeks Blond, the brewery has the beers Genhouts Genot, Bengelder Bengel, Hedelfinger Kersenbier and Witte Juffer. Genhouts Genot and Bengelder Bengel are named after Genhout and Bingelrade, two villages near to Jabeek. Hedelfinger Kersenbier is specifically brewed for Gasterij Hedelfinger, a restaurant in a neighboring village. Lastly, Witte Juffer is based on a folk legend of a ghost (the Witte Juffer or White Lady) that according to local legends haunts the forests of Schinveld (Dorpsbrouwerij De Maar, 2014; Bruls, 2013).

4.2.2. DE MARKIES (DEN BOSCH)

De Markies is located in the Paleiskwartier district, in an apartment complex called De Markiezenhof (figure 11). This is quite an unusual location for a brewery, because the customs do not allow a brewing firm to be located on a private address. However, there was a loophole in the zoning law, which allowed them to stay: “When we started our brewery here, the new zoning plan had not yet been made, which formally meant that this entire neighborhood was still considered to be an industrial area. Now, the zoning plan wouldn’t allow us
to establish a brewery here, but we are protected by the transition law, which allows us to stay”.

Rik Schuurmans, co-founder of De Markies, was born and raised in Den Bosch, where he has lived all his life. After studying ‘policy oriented environmental studies’ and ‘law’ at Radboud University in Nijmegen, he started working at the Department for Land and Water Management, which was part of the Ministry of Economic Affairs. As a craft beer enthusiast, he became interested in the beer brewing process, and first started brewing beer in the summer of 2009 together with his friend Johannes Janssen. Satisfied with the results, they continued brewing beer. Soon, word started to spread about their home brewing activities, which led several local liquor shops, cafes, restaurants and regional produce shops to approach the brewery and inquire on the possibility of purchasing their beers. As a result of the growing demand, they established the brewery in 2011. However, this has remained a part-time job for both, and will likely remain that way: “We have no ambition to grow. If we were to grow, we would be more concerned with networking, marketing and sales, and then we would have to leave the primary brewing process to others. And that takes away the fun, and having fun was why we started brewing in the first place”.

The beers are sold under the brand ‘Ons Vergist’, which has a double meaning and means both ‘Our Mistake’ and ‘Our Fermentation’. It has eight year round beers: ‘Is Stout’, ‘Signature’, ‘Grand Cru’, ‘Hop d’r op en d’r Over’, ‘Rood!’, ‘ietsiepietsieanders’, ‘Patricius’ and ‘Bokhovens Blont’. Only the latter refers to a place: Bokhoven, a village in the municipality of Den Bosch where the hops for that beer are grown (R. Schuurmans, interview, April 23 2015; De Markies, n.d.).
Katjelam was founded in 2014 by two students of the Radboud University Nijmegen, Mattias Terpstra and Vincent Gerritsen, who are both currently studying physics. Terpstra – who grew up in Nijmegen – notes that he always had a passion for developing food and beverages: “Before I started brewing, I was doing a lot of gardening and cooking, all to rediscover what the basis is of the food we consume”. When two people of his student union – Marie Curie – circulated an e-mail stating that they wanted to start brewing beer, he realized that this “fit exactly with what I was doing” and joined the beer brewing club together with Gerritsen. However, after a while, the duo became dissatisfied with the progress they were making: “For us, it was a bit limiting to brew solely for the study association, because that limits the types of beers you can make. In addition, brewing with 8 to 10 people - or more - slows down the brewing process, and I wanted it to go faster”. Together, they started brewing in the kitchen of Terpstra’s parents. When they decided to brew commercially in 2014, they moved to ‘De Smeltkroes’ (see figure 12 on the next page), where the brewery is currently located. De Smeltkroes used to be part of the Honig factory, which made soups and vermicelli. However, after the factory closed down, the estate became vacant. In the following years, the premises of the former Honig factory attracted new investors and companies specializing in craftsmanship, and now – in addition to the Katjelam brewery - houses the Oersoep brewery, several workshops and entrepreneurial firms specializing in traditional food, arts, fashion, manufacturing, technology and design (Smeltkroes, n.d.).

Although the duo is satisfied with their current location, they do not view it as permanent. No plans have yet been made, but Terpstra likes the idea of moving either to the city center, or moving to a farm on the outskirts of Nijmegen and having on-site production of its raw materials, as he sees local and sustainable production of resources as central characteristics of the brewery’s identity. On the brewery’s website, it states that its goal is to achieve “a closed chain to relieve the pressure on global food production and consumption”. However, it will probably take them a few more years to move: “What mainly stops us from moving is our study, because when we start growing, you are jumping on a moving train, and that would be disastrous for our grades”.

The name of the brewery is a pun, as Terpstra notes that ‘katjelam’ (a colloquialism which means being wasted or drunk) is the opposite of the attitude of craft beer drinkers: beer should not be drunk excessively, but should be enjoyed in small quantities. When the words ‘katje’ and ‘lam’ are separated, it spells cat-lamb, which formed the basis for the brewery’s logo. The brewery sells eight different beers, which do not have references to place: ‘Pepper Rebellion’, ‘Chestnut Brown Ale’, ‘Flemish Rye’, ‘Goozie’, ‘Gräzer’, ‘London Porter’, ‘Red Velvet’ and ‘Zure Perzik’ (M. Terpstra, interview, April 3 2015; Katjelam, 2015).
Jonge Beer was established by Jan De Vries and his wife Alie in 2014. Jan de Vries started brewing in 1982 out of dissatisfaction with the variety of the beer supply. As a teenager, he traveled to Belgium and Germany, which had a wider variety of beers with tastes he had never tasted before. Disappointed by the supply of the local liquor store, which “perhaps could get him a Duvel”, he started to inquire on home brewing at the book store where he worked, and later joined ‘De Wortketel’, a local club for home brewers, of which he is still a member.

After having worked as a bookseller and pharmacist, De Vries decided to turn his hobby into his job. More than doing what he liked, he was motivated by two other reasons to start his own brewery. First, because he always had a fascination for history, he spent a lot of time studying the history of beer brewing in Hoogeveen, which he even compiled in a book: ‘De
bierbrouwers van Hoogeveen (1672-1850). As a result of his research, he grew unsatisfied with the fact that Hoogeveen did not have its own brewery anymore, and felt he “could not just stand by and leave that task to someone else”. Secondly, he wanted to improve the overall perception of the place where he grew up, as “people often think about Hoogeveen: nothing happens there, it has never been anything, it isn’t anything now and it will never become anything”. This led him and his wife to acquire a building on the former industry road of Hoogeveen, which can be seen in figure 13 below. This building is typical for the reconstruction period of the Netherlands after the Second World War, and was built in 1948 as a factory that produced wooden toys. However, when the factory closed down, the location was used by an oil trader and subsequently a cannabis plant, so when De Vries acquired the building in 2014, “the walls had all colors between blue, brown and grey”. At the time of the interview, the building was still being furnished and restored in its original state. Here, De Vries attempts to preserve as many typical historic properties of the building as possible. Having a historic building that also lies adjacent to the city center of Hoogeveen, De Vries has the location he dreamed of and does not think that he would move any time soon.

![Figure 13: Jonge beer brewery (Jonge Beer, 2014)](image)

The name of the brewery is based on a name that is widely used in the northern provinces of the Netherlands and in Scandinavia: Homme. This name is derived from the Old Norse word Humber, which can be translated as Jonge Beer (Young Bear). Currently, the brewery has four different beers: HobBlont, Humber, Wadder and Sunt Steffen. The name of the last beer, Sunt Steffen, is based on the local name for the day after Christmas, and is available in the winter season. The beer Wadder is made with smoked peat – a product that the area is widely known for. A Wadder is the 17th century term for a peat-cutter, a tool used to get the peat out of the soil. In addition, it plans to release a weizen called Witte Weyte, and weyte is local dialect for wheat.
Lastly, the brewery plans to release a beer using locally produced heath honey, as several of De Vries’ ancestors were beekeepers in the area of the Dwingelose Heide (heath of Dwingeloo). The most central aspect of these beers is Jan’s desire for uniqueness: “I won’t do any concessions to the taste I have envisioned, because if I want to create a taste that accommodates for a larger crowd, I can just go to the local liquor store, that’s a lot easier”. (Jonge Beer, 2015; J. De Vries, interview, April 22 2015)

4.3 BREWERIES PRODUCING BETWEEN 100 AND 1,000 HL ANNUALLY

4.3.1. BROUWERIJ WAGENINGEN (WAGENINGEN)

Brouwerij Wageningen is located on the Nudepark, one of the business areas of Wageningen, and was established in 2013 by Stefan Duurkoop and Dennis Lebbing. Duurkoop grew up in a small village near Rotterdam, where he started brewing at 16 using a home-brewing kit after being introduced to craft beer at a local liquor shop. In 2003, he moved to Wageningen to study bio-process engineering at Wageningen University. Ten years and two degrees later, he decided to turn his hobby into a full-time job by establishing Brouwerij Wageningen together with Dennis Lebbing, as he states “I think that starting a brewery ourselves has a lot to do with obstinacy: thinking that we can brew better beers than those already on the market”. The duo purchased a building on the Nudepark (see figure 14). However, due to lacking atmosphere, visibility and accessibility of the current location, they view the Nudepark location as temporary, and plan to move closer to the city center somewhere in the coming years.
One of the central aspects of the brewery is that it tries to localize its supply and distribution chain as much as possible. A local farmer produces most of the barley the brewery uses, the brewery cultivates some of its hops and the beers are all sold exclusively in Wageningen. With this desire for localness, naming their brewery Brouwerij Wageningen came naturally. Although the brewery carries the name of Wageningen, it was not the first microbrewery to settle there, being preceded by Onder de Linden. The logo consists of a cart wheel and the brewery's name, with 'brewing without borders' as their motto. The cart wheel is taken from the civil crest of Wageningen.

Currently, the brewery sells five different beers. Otto van Gelre II, an amber beer, is named after the man that granted Wageningen borough rights, and was brewed to celebrate the 750 year anniversary of the city, which also is the same year the brewery was established. Hermelijn, a weizen, is named after the stoat, an animal that has a white winter coat and can be found in the region of Wageningen. The Tsaar van Wageningen (Tsar of Wageningen) is an Russian imperial oatmeal stout. The Engelandvaarder (England paddler) refers to the boats that were used by the Dutch refugees in the Second World War to sail to England and join the Allied forces. Mordicus, a crossover between a doppelbock and a dunkelweizen, has no special local or historic connections (S. Duurkoop, interview, 24 April 2015; Brouwerij Wageningen, 2015).

4.3.2. ZWOLSE STADSBROUWERIJ HETTINGA BIER (ZWOLLE)

In 2007, the brewery which would later become Zwolse Stadsbrouwerij Hettinga Bier was established by Focke Hettinga. Hettinga grew up on a cattle farm in Friesland, a province in the north of the Netherlands. In this environment, he was frequently involved in food production, as many
foods were grown, processed and prepared at home. Although he started drinking regular pilsner beer as a teenager, he became interested in craft beer in his early twenties after a few visits to Belgium: “That's when I discovered real taste!”. Dissatisfied with the existing beer supply, he started brewing his own beer at the end of the 90's. In 2007, he established his own brewery, Hettinga Bier.

Initially, Hettinga wanted to name his brewery Brouwerij Zwollerkerspel, after the borough where the brewery was located at the time, but unfortunately he could not register the name. Subsequently, inspired by Freddy Heineken, he decided to also name his brewery after himself: Hettinga Bier. The brewery moved to Marslanden, an industrial estate southwest of the city center of Zwolle. However, in 2013, the brewery was moved to the Diezerpoort district due to a lack of space in Marslanden. Currently, the brewery is located on a business incubator, De Creatieve Coöperatie (Creative cooperation), as seen in figure 15.

Interestingly, it was not until this point that the name of the brewery was changed to ‘Zwolse Stadsbrouwerij Hettinga Bier’. Since the brewery was now located in a central place of the city and participated more in local events, Hettinga felt that it was right to rename his brewery as Zwolse Stadsbrouwerij Hettinga. The logo, however, yet remains unchanged, and consists of the name ‘Hettinga Bier’, with the subtitle “takes time for quality”.

The brewery attempts to get as many of its raw materials from the region as possible. At the moment, some 80 percent of the brewery's malts come from the region, and are produced by a farmer in Vroomshoop, Overijssel. On a similar note, it has planted some hops next to the building, which it hopes to be able to use starting this year.

All the names of the beers are related to Zwolle. ‘Zwolse pils’ and ‘Zwolse bok’ have the name of the city in their name. ‘IJssel Wit’ and ‘Zachte IJssel Weizen’ incorporate the name of the river that flows along the city, the IJssel. Hanze Dubbel and Hanze Tripel refer to the Hanseatic Legue of which Zwolle was a part in the Late Middle Ages. The ‘Sassenpoorter’ is named after the
Sassenpoort (Sassen gate), a gatehouse in the city wall of Zwolle, which is currently a national heritage site. Lastly, the Agnietenbier is a reference to the Agnietenklooster - a monastery that was located in Zwolle between 1398 and 1581 - and was brewed for a local festival organized by Historisch Centrum Overijssel (Historic Center Overijssel) and two local museums. (Hettinga Bier, 2014; F. Hettinga, interview, 15 April 2015)

4.3.3. DORPSBROUWERIJ DE PIMPELMEESCH (CHAAM)

Just outside of Chaam, a small village in the Southwest of the province of Brabant, Dorpsbrouwerij De Pimpelmeesch is located at a small farmhouse (figure 16), which was built around 1700. It all began 25 years ago, when Ad Kusters - a chemistry student at the time - took a brewing course out of interest for the drink he loved. Subsequently, he started brewing at home with two friends, Johan Cornelissen and Jeen Brouwer. In the following years, the local demand for their beers grew, which led to the establishment of the Pimpelmeesch foundation in 2000. This allowed them to brew commercially. However, at the time, they still did not have their own brewing installation, and brewed their beers at a brewery in Belgium. In 2010, when the brewery became a Professional Limited Liability Company [PLLC], Kusters’ two companions left the PLLC, for the reason that “they both had a family and could not afford to work part-time at the brewery”. Following these events, Ad started to look for a location to establish his own brewery, as with contract brewing they could not keep up with the demand for their beers.

It was not until February 2013 that the brewery acquired its own location. After having read in the local newspaper that De Pimpelmeesch was seeking a location to set up the brewery, the owner of a local farm approached Kusters with the offer to start the brewery in his farm together with a tasting room. Since the location could be rented for a reasonable price, had visual appeal and was located along hiking and cycle routes, Ad accepted the offer and moved the brewery to the farm.
The brewery is part of ‘Smaakverbond De Baronie’, which is a local cooperative association that brings together producers of regional produce. Besides selling their products in each others’ stores, these producers develop new products together. Together with a local winegrower, De Pimpelmeesch makes beer batter and whiskey. Similarly, the brewery supplies its beers to a local sheep farmer, who uses the beer in one of its cheeses. Lastly, it plans to cooperate with a red deer farm on products like carbonade flamande and pâté with beer. Aside from De Baronie, De Pimpelmeesch works together with a distillery in Tilburg that uses their ‘Chaamse Tripel’ to make liqueur and another cheesemaker that uses their Tripel in one of his cheeses.

The name ‘Pimpelmeesch’ can be interpreted in two ways. In Dutch, a pimpelmees is a bird, which is used in the logo of the brewery. However, in the regional Brabantine dialect, it can also mean something different: ‘meesch’ is Brabantine for man, and ‘pimpel’ means to drink. Therefore, the name pimpelmeesch can also mean ‘drinking man’. The beers of the brewery have more specific links to Chaam. Four beers of the brewery carry the name of the place: ‘Chaams Dubbel’, ‘Chaams Tripel’, ‘Chaams Tarwebier’ and ‘Chaams Winterbier’. Three other beers are connected to the region: Zilverpel, Goudpel and Baken van Breda (Beacon of Breda). Goudpel and Zilverpel refer to the plumage of the chickens held by farmers in the region, and the beer ‘Baken van Breda’ refers to the Grote Kerk of Breda, a city located near Chaam. In addition, the brewery develops and brews beers for several local cafes, restaurants and organizations. Although the Belgian border is only two kilometers away, the brewery does not export its beers. This is mainly due to the fact that they choose to prioritize the region: “Our main market is Brabant, and some of our beers are dispersed over the rest of the Netherlands”. (D. Van Alderen, interview, 28 April 2015; De Pimpelmeesch, n.d.)
Following the hobby of his father – who started brewing in 1999 – Dirk Heupink started brewing beer when he was 15. Heupink studied engineering management and mechanical engineering, after which he established Ootmarsummer Bierbrouwerij Heupink & Co together with his friend Bart Nijhuis in 2012. The duo started with a small 50 liter brewhouse, but after being “unable to drink our own beer because it was sold out”, they saw potential in making their hobby their profession, and started to upscale the brewery. This included moving the brewery to Eerste Stegge (figure 17), an industrial estate in Ootmarsum where the brewery is currently located, and constructing a bottle-filling machine. Now that the brewery is growing fast and space at the Eerste Stegge is becoming scarce, the duo plans to move the brewery into the Commanderie of Ootmarsum, which can be seen in figure 18. The Commanderie is a castle that was located in Ootmarsum between 1273 and 1811 and is currently being rebuilt in the city center. According to the current plans, the new castle will house the brewery, a cafe, a restaurant and a shop specializing in regional produce (D. Heupink, interview, 17 April 2015; Othmar, n.d.).

The beers of the brewery are all sold under the name Othmar, named after the Franconian king, King Othmar, who founded Ootmarsum and lived there in the second century. Not only was this name chosen to link the brewery to Ootmarsum, but also because the name is pronounceable to
German tourists, which frequently visit the region. At the moment, the brewery sells five different beers: Othmar Goud, Othmar Weizen, Othmar Rauchbier, Othmar Dunkelweizen and Othmar Tripel. For now, these are almost exclusively sold in Twente, but are soon to be made available throughout the Netherlands (Othmar, n.d.; D. Heupink, interview, 17 April 2015).

4.3.5. STADSBROUWERIJ DE KOPEREN KAT (DELFt)

Stadsbrouwerij De Koperen Kat (The Copper Cat) is situated on an industrial complex in the south of Delft. The brewery is housed in the factory that was previously the Nederlandsche Kabel Fabriek [NKF] (Dutch Cable Factory). This factory was established in 1914, and made high- and low-voltage cables. However, after Philips took over the company in 1970, the company abandoned NKF in 1986, and sales began to dwindle. As a consequence, the production capacity shrunk, which led large parts of the factory to become vacant (Buiter, 1994).

In the last years, the area has attracted new firms and has been renovated. Rolf Katte, founder of the brewery, first settled on the premises of the former factory in 2003 with his other company, Katte Export Packaging, which specializes in fabricating packages for export. Later, after participating in a historic tour through the city center of Delft, Katte was surprised to find out that “not Delftware, but beer made the city flourish”, as Delft used to have several widely renowned breweries, of which none had remained. Troubled by these
findings, he was set to change the status quo and founded Delftse Stadsbrouwerij De Koperen Kat in 2011, even though he had no prior brewing experience. Initially, the brewery was located in the kitchen of his own company, but as the brewery started to grow and the neighbors started to complain about the odors produced by the beer fermentation process, he moved the brewery to its current location in the Kabelfabriek, which can be seen in figure 19. Now, Boyd Keijzer - who previously worked at the beer development department of DSM in Delft - has taken over most brewing activities (Gemeente Delft, n.d.; B. Keizer, interview, 10 April 2015; R. Katte, interview, 5 June 2015).

![Figure 19: De Koperen Kat brewery on the premises of the former cable factory (Koperen Kat, 2013)](image)

The name Copper Cat is derived from the fact that brewing kettles are traditionally made of copper, and cat from Rolf's surname, Katte. The cat on the brewery's logo holds a crest, which tells the story of the brewery. In the upper left corner, the black and white city-arms of the city of Delft is portrayed, which represents the place of residence of Katte and the place where his brewery is located. In the upper right corner, the waterpolo player represents Katte's favorite sport: waterpolo. Below the waterpolo player, the arms of the city of Utrecht can be seen, Katte's place of birth. Lastly, the casket is a reference to Rolf's export packaging company (B. Keijzer, interview, 10 April 2015; Koperen Kat, n.d.).

At the moment, the brewery has 10 different beers: 'Blonde Anouk', 'Lindebier', 'Princebier', 'Balthasar', 'Delftse Donderslag', '015', 'Brrr...', 'Joie de Vivre', 'D'Oostpoort' and 'D-AL-G'. The first two beers are named after Rolfs two daughters, Anouk and Linde. Princebier, Delftse Donderslag and 015 refer to Delft: Delft was known as the 'Princedad' (Prince City), and
is also known today as 015 (the area code of Delft). Two beers have a more historic connection: ‘Balthasar’ refers to Balthasar Gerards, who murdered Prince Willem van Oranje in his residence in Delft and was also executed in the same city. ‘Delftse Donderslag’ refers to a disaster that happened in Delft in 1654, when a storage for fulminating powder exploded, wreaking havoc in the city center. D’Oostpoort, a dubbel, refers to the last remaining city gate of Delft, the Oostpoort (Koperen Kat, n.d.).

4.4 BREWERIES PRODUCING MORE THAN 1,000 HL ANNUALLY

4.4.1. OEDIPUS BREWING (AMSTERDAM)

Oedipus Brewing was established in 2012 in Amsterdam by four friends: Rick Nelson, Sander Nederveen, Alex Mager and Paul Brouwer. The group lived in Noordwijk before moving to Amsterdam, where they studied visual arts, anthropology, psychology and hydrology and became even closer friends. After visiting many beer festivals in the Netherlands and abroad, they became inspired to brew their own beers: “When we went abroad, we noticed that the beers were aimed to a different audience than in the Netherlands; we do have craft breweries, but these are mostly catered to the ‘beergeek’, the niche market. We wanted all our friends to drink craft beer, and introduce good beer to a larger audience”. Curious about their own ability to brew beers, they started brewing at home. After two years of home brewing, they founded Oedipus Brewing in 2012, and moved the brewery to a small garage. The place quickly became too small, which initiated the relocation to the Westerdok in 2013. At the Westerdok, a business incubator south of the IJ lake, they could obtain a location for a relatively low price with other creative initiatives, such as ateliers, architects, fashion designers and composers on the site. However, they found out that it was not possible to have a brewpub at that location, since a building contract from 2008 stated that no cafes, restaurants, pubs or hotels could be started on the site. In addition, some neighbors did not want to have a brewery in their area. Due to these factors, the brewery made the jump over the IJ and settled on the former STORK area (figure 20) in Amsterdam in early 2015, and was still being set up at the time of the interview. The STORK area is a business estate in Amsterdam Noord, and is also a business incubator (Oedipus, n.d.). As of June 19, the brewery has started an artist-in-residence program and opened a tap-room on the new location (Oedipus, 2015).

For the most part, Oedipus is a contract brewer, as only a small share of their beers is brewed with their own kettles. It does have its own brewing installation, however, which is mostly used to provide small batches of new experimental beers. According to Rick Nelson, the central objective of the brewery is to break away from existing stereotypes around beer: “The large brands have always communicated via ads and TV that men like football and drink Amstel with their friends, and women drink fruit beers. Now, people have started to believe these
"stereotypes, and our goal is to break these stereotypes". For this reason, they have consciously chosen not to refer to Amsterdam in their brand name, as they feel that this might confine the audience of their beers and is rather stereotypical for microbreweries. (R. Nelson, interview, 13 April 2015)

Figure 20: Oedipus brewery on the STORK area (Google street view, 2015)

The brewery currently has nine different beers, which are sold in the Netherlands and Belgium and do not have references to place: 'Mama', 'Panty', 'Rubberen Robbie' (Rubber Robbie), 'Mannenliefde' (Man love), 'Gaia', 'Thai Thai', 'Slomo' and 'Dodo'. Next to these beers, it has also made a few beers exclusively for specific occasions, namely Hollandse Gedroogdepe Cider' (Dutch Dry Hopped Cider), 'Salty Dick', 'Lekkerbek' and 'Ring Your Mother'. (Oedipus, n.d.)

4.4.2. STADSBROUWERIJ DE HEMEL (NIJMEGEN)

Stadsbrouwerij De Hemel (Heaven) was established in 1996 by Herm Hegger. It is located in the city center of Nijmegen in the ‘Commanderie van Sint-Jan’, which dates back to 1196 and is one of the oldest buildings in Nijmegen. In addition to a brewery, De Hemel is also a restaurant, bed-and-breakfast and a museum. In addition, the building houses a shop selling regional produce and other shops specializing in craft products.

Hegger became fascinated with the brewing process when he worked in a brewery as a summer job when he was 14. He studied applied home economics, and subsequently started a peanut butter factory to save up for a brewery, which requires a large investment. In 1983, he established one of the first Dutch microbreweries - 'De Raaf' (The Raven) - in Heumen, which is approximately ten kilometers from the current location. In 1991, De Raaf was consolidated by Oranjeboom, and in 1995, the brewery was closed down. Following these events, Hegger established De Hemel in 1996 in Nijmegen. Until 1999, the brewery was located in the Brouwershuis, which is also located in the city center. For Hegger, the most important aspect of
this location was the visual appeal of the building. However, the building was only available for rent, and Hegger wanted a building that he could own, because that is more favorable in the long run. For this reason, he moved the brewery to the Commanderie van Sint-Jan in 1999, as seen in figure 21. Both with De Raafl and De Hemel, Hegger lived next to the brewery, as he states “having a business is a lifestyle”. (H. Hegger, interview, 8 April 2015).

The brewery has 11 different beers: 'Luna', 'Godelief', 'Serafijn', 'Helse Engel', 'Nieuw Ligt', 'Mariken', 'Moenen', 'Rooie Tiep Top', 'Botterik', 'Grand Cru' and 'Hanenberg'. Most beers are exclusively sold in Nijmegen. The other beers are exclusive to other specific places: Hanenberg is only sold in Beek (a place near Nijmegen) and was brewed using water from Beek, Botterik is exclusively brewed for a select number of cafes in Bottendaal (a neighborhood in Nijmegen) and Rooie Tiep Top is brewed exclusively for another local cafe. Mariken and Moenen are references to Mariken van Nieumeghen (Mariken of Nijmegen), who appears in a late medieval text that tells a story of a girl (Mariken) living in Nijmegen and spends several years with the devil, who appears before her as a person called Moenen. However, these connections are not explicitly marketed by the brewery. (De Hemel, n.d.)

Figure 21: De Hemel brewery in the Commanderie van Sint-Jan (Own work).
Twentse Bierbrouwerij is located on a gentrified industrial area near the central station of Hengelo, a place located in the east of the Netherlands in the region of Twente. The site previously was a fuse box production plant of Hazemeijer, after which it was abandoned. For the next 11 years, the area was vacant and slowly deprived. However, in the following years, the lot attracted new investors. Initially, this comprised local artists, but later it started to attract more businesses in the creative sector, such as architects, graphic designers and others. Frank Hendriks, founder of the brewery, was born and raised in Hengelo. Here, he attended hotel management school, where he specialized as a chef. Subsequently, he joined the marines, after which he became head of the food department at Medisch Spectrum Twente, a hospital in Enschede, where he worked for the next 18 years. After that, he started his own catering company, which he had for five years. At one point, one of his clients, a real estate investor, invited him to settle his company on the Hazemeijer. Here a few different elements came together: not only did he know the area because his father worked at the former factory, but it also resembled the Distillery District in Toronto, which he visited during his time as a marine: “I had seen such an area during my time in Toronto, as well as the Westergasfabriek in Amsterdam, and quickly realized that there is great public support for initiatives like this”. He decided to put his culinary skills to other use, and established Twentse Bierbrouwerij on the premises of Hazemeijer in 2008 (see figure 2). Although he had no experience as a brewer, he notes: “If you can cook, you can brew beer”.

Figure 22: Twentse Bierbrouwerij (Own work).
Although many brewery founders connect their brewery's identity to local and regional histories, Hendriks does not use this in his brewery: “When you look at our logo, you can see that the direction of the Saxon Steed (the crest of Twente) is flipped around; it jumps to the right, it faces forwards. Officially, the Saxon Steed jumps to the left, backwards. We consciously chose to do this, because it refers to the fact that we are a very young business that looks forward, to the future, and not necessarily to the past”. He feels that using references to history would not be authentic for his brewery, as “storytelling is very important, but it is even more important that people feel that your story is genuine. Therefore, since my brewery does not have any historic connections, I chose not to do this”. However, he does use references to place in the name of his brewery and its beers. The name of the brewery can be translated as 'brewery of Twente'. Here, the brewery is not named after the place in which the brewery is located, but the region: Twente. This was a conscious decision, as Hendriks states that by using the name of the region instead of the place, a greater number of people can identify with the brewery and its beers, which gives him a greater market. (F. Hendriks, interview, 29 April 2015)

At the moment, the brewery has seven different beers, which all carry the name of the region, are brewed with barley grown in Twente and are also sold exclusively in Twente: ‘Twents Pils’, ‘Twents Oerpils’, ‘Twents Wit’, ‘Twents Bok’ ‘Twents Rosé’, ‘Twents Amber’ and ‘Twents Honing Tripel’, which was brewed using the honey of a local beekeepers association (Twentse Bierbrouwerij, n.d.).
CHAPTER 5: RESULTS

In this chapter, we will analyze the data collected with the interviews in an attempt to answer the research questions of this study. Paragraph 5.1 focuses on the first sub-question, and attempts to provide a definition of the term ‘microbrewery’. Subsequently, paragraph 5.2 looks at how the identity of microbreweries is related to place. Paragraph 5.3 focuses on the location factors that microbreweries deem to be important, and lastly, paragraph 5.4 focuses on the networks of breweries.

5.1: DEFINING AND CATEGORIZING MICROBREWERIES

The first sub question of this thesis is: “How do brewery founders define microbreweries?”. In this paragraph, we will first look at how the term is defined by the participants, and subsequently other typologies that the brewers made will be briefly described.

5.1.1 DEFINING MICROBREWERIES

As discussed in chapter 1, the definitions of microbreweries were unsatisfying for this research. All the breweries included in this study were unclear on what the exact definition of a microbrewery is. Most breweries did not know where the definition starts and ends, but remarkably, all brewers considered their brewery to be a microbrewery. Leon Bemelmans of Dorpsbrouwerij De Maar noted: “I think it partially boils down to the atmosphere that surrounds a brewery”. However, the ‘micro’ in microbrewery suggests that there is a certain requirement for the production scale. In addition, the notion that a focus on the local market is an essential characteristic of a microbrewery was mostly rejected, because “this is entirely dependent on the networks of the brewer”.

After discussing with several brewers about possible definitions of microbreweries, the most accepted model was the following categorization: breweries with a year production smaller than 1,000 hectoliters, breweries with a year production between 1,000 and 10,000 hectoliters and breweries with an annual production larger than 10,000 hectoliters. These can be categorized as ‘nanobreweries’, ‘microbreweries’ and ‘large breweries’ respectively. This model was proposed by the founder of one of the larger breweries, who believes that a brewery that produces less than 1,000 hectoliters annually is not viable enough to survive solely on beer sales, though most breweries are reluctant to admit that. Similarly, around an annual production of 10,000 hectoliters, a brewery becomes a serious competitor of larger breweries such as Heineken, Grolsch and Amstel. Nevertheless, these bars are still arbitrary, as there are no underpinning reasons for drawing a hard line at any of these production volumes. Therefore, these demarcations can be better thought of as transition zones instead of absolute borders, and remain controversial.
5.1.2 OTHER TYPOLOGIES

In addition to the aforementioned definition, two other typologies were proposed, although these were not necessarily related to the term microbrewery. One brewer proposed to make a distinction based on the education and skills of the brewer:

“In the brewing world, there are two strands of small brewers. On the one hand, there are small breweries which are a reflection of the knowledge, experiences and traditions of the larger breweries that have had the accompanying formal training and such. On the other hand, you have the upscaled hobbybreweries, who speak the language of pots and pans. These two worlds clash, because we do not speak the same language, and therefore we cannot communicate with each other”.

Here, the distinction is made on the basis of the amount of knowledge that the brewer possesses. Similarly, another participant grouped breweries in two categories: breweries that started with a business plan and upscaled hobbybreweries that did not start with a business plan.

5.1.3 CONCLUSION

The participants had completely different ideas on what defines a microbrewery. By asking the participants to define the concept of microbrewery and its ramifications, comparing these definitions and asking them again to give feedback on the definitions of others, microbreweries were defined as “breweries producing between 1,000 and 10,000 hectoliters annually”. This differs from the ways in which microbreweries have been defined in the first chapter.. In addition, breweries producing less than 1,000 hL/year can be called nanobreweries, and breweries producing more than 10,000 hL/year can be considered large breweries. When viewing the participating breweries in this light, nine breweries included in this study are nanobreweries and only three breweries can be considered microbreweries. Since these terms are arbitrary and by this definition both ‘nanobreweries’ and ‘microbreweries’ have been included in this study, we will for now group these together and refer to all these breweries as simply ‘breweries’, ‘small breweries’ or ‘microbreweries’ in the rest of this study.

5.2: IDENTITY AND PLACE

The second sub-question was: “How are the identities of microbreweries connected to their place of establishment?”. Here, the use of place in the enacted organizational identity is studied. This enacted organizational identity was split in five subdimensions: personal identification with place (5.2.1.), name of the brewery (5.2.2.), product names (5.2.3.), product types (5.2.4.) and marketing strategy (5.2.5.), which will be discussed in this paragraph.
5.2.1. PERSONAL IDENTIFICATION WITH PLACE

In general, the notion that the longer a person lives in a place, the more he or she feels attached to that place (Raymond et al., 2010, p. 425) was supported by the collected data. This is especially true when that person was born and raised in that place, as only one of the six brewery founders who were born in the same place as their brewery is located claimed that he felt no special connection with his place and rejected applying the demonym of his place of residence to himself. A good example of attachment to the place of birth was given by Rik Schuurmans of De Markies, who noted: “I’ve been a member of the local choir my entire life, and have been a member of the city’s monument foundation for twenty years. […] When I’ve been on a holiday and I drive into Den Bosch, I am home again. I know the church, I know every stone on the market square, and I know where everything is.” Subsequently, he stated his attachment to his place by saying: “When I can’t find a job in a place that is accessible from Den Bosch, I will go and find something else” and “I will not move. I will move once more, in a wooden coat (coffin)”. This identification with place was even more reinforced when the family of the brewery founder lived in the area for multiple generations, as one brewer noted that he felt connected to the area for the reason that “my ancestors have lived in this area for 800 years”. At the brewery level, one brewer felt nostalgic about the area because his father worked on the site of the former factory where the brewery is located.

By setting up a brewery, most of the brewers started to identify more with the place in which they lived. This was due to the fact that they started to have more social contacts and interactions with the local environment. “It’s become 100 times more extreme, because you get to know so many more people from the village, and when I go out, many people come to me and say: we love your beer! So even outside of work, you get to know a lot of people”.

All the interviewees established their brewery in their place of residence, and all still lived in that place. For most, this was mainly out of convenience, to minimize travel time, which allowed them to put this time to other use such as “spending more time with my kids”. The friends and family of the brewer formed an important connection to place. In five cases where the brewery founder was not born in the place where the brewery was established, the partner of the participant played a central role in the attachment of the brewery to the place: “My girlfriend works at the university here, so when I finished college, I stayed and set up the brewery in this place”. However, this decision was also often made on the basis of feelings of pride and belonging regarding the place. All the brewers were craft beer enthusiasts themselves, and the participants who were the first to set up a brewery in their place stated that they found it personally very important that “my city has its own brewery again” and wanted to “revive the beer culture of my place”.

Most brewers also stated that they set up their own brewery because they were not satisfied with the current supply of beers, and thought they could create products that were more unique or better than the beers of existing breweries. Lastly, the participants of two of the larger breweries included in this study also mentioned that they set up their own brewery as they yearned to have their own company out of a desire for autonomy: “I like the way of life as an independent entrepreneur in a small enterprise, because it gives me personal freedom”. Interestingly, this desire for autonomy was also reflected in their business model, as they usually had very little contact with other breweries and firms in the region. Hence, as expected on the basis of findings by Kroezen & Heugens (2012), the identity of the brewery and the identity of the brewery founder are closely intertwined.
Most of the breweries carry the name of the place or region of settlement in the name of their brewery to create attachment to their place. By doing this, several brewers stated that they hoped to cater to feelings of pride - or even chauvinism - among local residents, as it “appeals to people, both locals and tourists”. For others, the name came first, and the fact that it had some local connections only came at second thought.

Two breweries, De Markies and Dorpsbrouwerij De Maar were named after the location of the brewery. This proved to be a very strong indicator of place attachment, as it not only conditions the brewery to stay in the city or village, but also on that exact location. Neither of the brewers has considered moving their brewery, and was satisfied with their current location and scale, because that location is central to their identity. Three breweries - Brouwerij Wageningen, Zwolse Stadsbrouwerij Hettinga Bier and Ootmarssummer Bierbrouwerij Heupink & Co - use the name of their place in the name of their brewery. This is also done by three other breweries ‘Delftse Stadsbrouwerij De Koperen Kat’, ‘Stadsbrouwerij De Hemel Nijmegen’ and ‘Dorpsbrouwerij De Pimpelmeesch Chaam’, although this is done less explicitly, as these are most often marketed as 'De Hemel', 'De Koperen Kat' and 'De Pimpelmeesch'. When asked if their brewery could exist outside of their place, most noted that this was theoretically possible, but saw no advantages in moving and thought that “in the course of time, people have started to associate the brewery with this place”. Lastly, Twentse Bierbrouwerij is named after the region in which the brewery is located, as Frank Hendriks states: “The name of the brewery is crucial, and most people who start a brewery do not think this through enough. In Twente, I currently have a market of 1 million people, which is far greater than when I would call my brewery the Hengelo Brouwerij”. Apparently, when a brewery is named after a place or region, it has the advantage of binding locals to the brewery. However, the downside is that it may make people from other places and regions indifferent to its beers, as Stefan Duurkoop from Brouwerij Wageningen notes: “When we brand something as being from Wageningen, people from other places may think: so what?”.

Additionally, two breweries – Jonge Beer and De Pimpelmeesch - used other references to place: Jonge Beer, as explained earlier, is a translation of the old Norse word humber, from which the name ‘Homme’ that is frequent in the region is derived, and the name Pimpelmeesch is based on two old-Brabantine words. These references to local nomenclature and names have the same function as references to place: they reinforce the local and historic image of the brewery.

Two breweries – Oedipus and Katjelam - had no connections to their place in the name of their brewery, and a few others do not have explicit connections to local history or places in their name. Oedipus and Katjelam made no connections to the city because they do not feel that making such a claim has a legitimate basis: “We do not brand our brewery as local, because we do not yet use locally produced ingredients. Therefore, we do not feel comfortable with saying that we make a local product, because that is not true”. Moreover, Oedipus refrains from using local branding because it aims to sell its beer to the largest possible audience, which includes selling the beer beyond its own city and country. Moreover, it views place branding as a cliché for breweries, and since it sees straying away from existing clichés as central to its identity, it does not follow suit.

The logos of the breweries usually literally followed the name of the brewery, as seen in the logos of breweries like Jonge Beer, De Koperen Kat, De Pimpelmeesch and De Markies. In the case of De Maar – whose logo features the sight of the local scenery – the locality of the brewery literally becomes part of the brewery's identity and the product it sells. Lastly, Twente
Bierbrouwerij and Brouwerij Wageningen use elements of the crest of their region or city respectively.

### 5.2.3. PRODUCT NAMES

For most breweries, empathizing place in their product names is even more important than in the name of their brewery. Several breweries, such as Zwolse Stadsbrouwerij Hettinga Bier and Twentse Bierbrouwerij use the name of their city or region recurrently in the names of their beers.

Beer names are also often based on specific places or landmarks in the city or region. For example, Delftse Stadsbrouwerij De Koperen Kat has beers like D’Oostpoort, which refers to the only remaining city gate in Delft. Moreover, references to local history are often used: Ootmarsummer Bierbrouwerij Heupink & Co sells all its beers under the name Othmar, which refers to the Franconian king that ruled his kingdom from Ootmarsum in the second century. Two breweries refer to animals that live in the region: De Pimpelmeesch has the Zilverpel and Goudpel, which refer to the plumage of the chickens that are held by local farmers, and Brouwerij Wageningen has the Hermelijn, named after the stoat that is frequently encountered in the region.

Similar to the name of the brewery, the names of the beers can also exclude certain markets. Not only is this because of references to places, but also because some names can be considered offensive in some more conservative areas in the Netherlands, as Rick Nelson of Oedipus notes: “Some of the names of our beers are perhaps a bit progressive, against the grain or suggestive, so you have to be able to handle that. Therefore, I wonder if our beers would work in regions like the Achterhoek”.

However, one brewer challenged the notion that place branding influences consumers: “Although regional produce is hyped at the moment, I don’t think that craft beer drinkers care where a brewery is located; they buy on the basis of taste and the reputation of the brewery, otherwise no one would buy beers from contract brewers like Rebels”. Although this might be a valid point, most of the brewers do see added value in having a local identity.

### 5.2.4. PRODUCT TYPES

In order to sell beers, breweries often have to listen to the local demand and taste of the consumer. In part, this ‘listening’ consists of testing new experiments in beer tastings and receiving feedback from clients.

> "When we started brewing Pilsner, we did a little market research. We called 3000 men between 30 and 50 in the region, and asked them what they liked about beer and which beers they liked, and we found that Warsteiner dominated as their beer of choice. Subsequently, we analyzed the properties of Warsteiner, and found that they preferred soft, easy-to-digest, drinkable beers, so we adjusted our beers to those preferences".

Apparently, local differences in taste still exist. De Pimpelmeesch, located near the Belgian border, had to adjust its beers to a market with a preference for Belgian beers. An example is the Indian Pale Ale – an originally British beer style - which was made less bitter and renamed as
Chaamse Pale Ale. This was done because “the average consumer in Brabant is geared more towards Belgian beers, so a regular IPA would probably not be successful here”. Similarly, Othmar, which is located near the German border, predominantly offers German beer styles: a Weizen, a Rauchbier, a Dunkel-Weizen and a German style Pilsner, with a Tripel as the only exception. Although this is also done out of the personal preference of the brewers, Heupink does notice that the local taste is mainly oriented towards German beer styles. One brewery had to experience these local differences in taste the hard way. After they launched their Schwarzbier, which is a popular beer style in eastern Germany, it had to be discontinued, because the beer did not catch on: “We let us lead by our emotions instead of listening to the market”. Therefore, to a certain extent, a brewery is tied to a place by taste, as it has to take local differences in taste into account.

5.2.5. MARKETING STRATEGY

Most of the breweries practice passive marketing, a marketing strategy that helps the customer find you. Most often, this entailed word-of-mouth marketing; a process that was recurringingly described as “making the consumer an ambassador for your beer”. In general, the participants believed that through ensuring the quality of their beers, they would get loyal customers, who in turn will spread the word about the brewery’s beers to others. Another important form of passive marketing was standing out from the mass. Several participants stated that the success of their brewery was partially due to having unique labels and unique bottles. Similarly, two breweries sold some of their beers by bicycle, which – by standing out from the usual delivery vans – was described as being a “driving billboard”.

A strategy mostly based on passive marketing was mainly pursued by the breweries that did not have an ambition to drastically increase their production volume. However, many agreed that when you want to ensure further growth and move serious volume, you have to “get out there” and market more in the form of social media, beer festivals and providing service articles like coasters, posters and parasols. For this reason, larger breweries practiced active marketing for the reason that that is the way to grow. Although the opinions of the participants were divided on whether beer festivals were effective, some stated that this was helped them to get the word out about their brewery, as one brewer noted:

“When we started our brewery, beer festivals were very important to get the word out. Even when we did not have a lot of beers, we were present at many festivals, where people were introduced to us. Later, we would receive many calls and e-mails from people who met us at festivals, saying that they wanted our beers”.

Three participants who established their brewery using crowdfunding also noted that this not only helped them to fund their brewery, but turned out to be an effective marketing strategy as well: “With our crowdfunding campaign, we gained a platform to tell our story which people saw, heard and shared”. The pledgers for these campaigns were usually locals from the same city. This also tied these breweries to their places, as most felt that they were required to stay in the place where the brewery was established in order to please their supporters.

The breweries practicing active marketing strategies are a minority. Most of the breweries do not have marketing strategies because marketing is mostly done for them by their clients, such as liquor shops, restaurants and bars.
In addition to marketing place, microbreweries also market themselves as authentic, transparent, artisanal and historic. Having a brewery seems to be as much about telling a story as selling beer. Almost all the studied breweries organize brewery tours and brewing master classes. This not only forms an extra point of income, but is also a form of marketing: the business is more transparent and given a more human face. Breweries like De Pimpelmeesch and Twentse Bierbrouwerij have glass walls between the brewery and the neighboring pub, which makes the brewing installation visible to the consumer: “People want to peek into the kitchen. When people are sitting on the terrace, they can look into the brewery through a glass wall, and we have noticed that our success partially comes from having a completely open and transparent business”. Here, it is implied that the consumer desires transparency, and perhaps mistrusts the larger beer producers. “What people find most important is that you can show that only one hundred percent natural ingredients are used, and that no manipulation takes place”. This reinforces the existing notion that local food and beverage production is a reaction to the increasing consolidation in the food and beverage industry, whose production methods are perceived as lacking in transparency and sustainability by the consumer. By attempting to create a transparent, small-scale and sustainable business, microbreweries attempt to generate a link of trust between producers and consumers (Fonte, 2008, p.203-204).

5.2.6. CONCLUSION

The studied breweries used place in several ways in their enacted identities. In their names, most breweries made references to their location, place or region of establishment. Similarly, the majority of the breweries had products with names based on local history, folklore, animals and places. In some cases, the participants also noted that they were tied to their place by taste. By listening to the market through receiving feedback from their clients, from consumers at festivals and brewery tours and by conducting market research, they could adjust their beers to the local or regional tastes. This seems to indicate that differences in taste still exist and are even present at the level of the region or place.

The identity of the brewery was very much linked to the identity of the founder(s) of the brewery. When the place where the brewery was located was the place of birth and residence of the founder, he or she usually identified more with that place due to the built up stocks of knowledge such as memories and feelings, and was more inclined to use place in the branding of the brewery. Other personal factors that tied the brewery to place were the partner, family, friends and historic connections to the place. As a consequence of establishing the brewery, most participants started to identify more with their place, mainly because they acquired more social contacts in their place and participated in more local activities. Hence, microbreweries are not only attached to place by the founder, but breweries can be seen as tools of local identity that shape place attachment in the brewery founders.

Next to personal reasons, references to the local in the name of the brewery and products were also made because they were often considered to be an important form of marketing: they evoke feelings of belongingness in the consumer, and attach the consumer – in particular locals and tourists - to the brewery. Although this is beneficial on the local market, some brewers believed that close association with a place can make consumers from elsewhere indifferent to the beers. Aside from marketing place, other marketing strategies included standing out from the mass, social media, beer festivals, local crowd funding campaigns and providing service articles to their clients.
The third sub-question was: "Which localization factors determine the connection of microbreweries to a place?". In chapter two, these factors have been described as push, pull and keep factors. In this paragraph, these factors will first be illustrated with a trajectory of the locations that most breweries settle on. This trajectory is split out in initial location (5.3.1.), their secondary location (5.3.2.) and their ideal location (5.3.3.), after which a brief overview of these location factors will be given in sub-paragraph 5.3.4.

5.3.1. INITIAL LOCATION

Nine founders of the twelve breweries included in this study started brewing beer in their homes, and used their kitchens, garages, sheds or ateliers as their workplace. However, in the Netherlands, it is not legal to brew beer commercially in a residential building, which requires most brewers to relocate their brewing activities to an excise warehouse once they become a firm. In addition, the amount of space available at home is often too limited to start a brewery, which urges the brewer to find another location. Three participants started their brewery without home-brewing experience, and did not start in their homes, but directly purchased a building for their brewery.

5.3.2. SECONDARY LOCATION

When the brewery is established, it is most likely to settle on an industrial or business estate. The most important pull-factor is the price of the location: a brewery is a large investment, and industrial areas often have relatively low land prices. Most breweries cannot be picky about this location, since their financial means are often limited. However, several participants stated that they did not actively look for the most optimal location: instead, they noted that they "found this location by accident, and did not look any further". One brewery was also attracted to an industrial area because another brewery was situated there. Here, they could share knowledge with the neighboring (more seasoned) brewery, as starting a brewery not only requires the brewer to make large investments, but also to possess knowledge about the brewing process and running a business. "After we let them taste our beers, they reckoned that we had sufficient brewing skills and took us under their wing. They sold us their old brewing kettles for a paltry amount, and still help us with a lot of things".

The disadvantages of being located on a business estate are that visibility, accessibility and atmosphere of the location are low. For this reason, most participants do not see business estates as a permanent location for their brewery, but as a temporary solution. This raises the question what kind of locations are regarded as ideal, or at least as permanent. In the next subparagraph, this will be further explored.

5.3.3. IDEAL LOCATION

The ideal location for a brewery is dependent on the nature of the firm. The breweries that had no other activities than brewing beer saw business areas as the perfect location for their
breweries, as brewing is “just an industrial process”. However, most microbreweries also have or aspire to have their own brewpub with additional activities such as beer tastings and brewery tours, which requires the brewery to be visible and accessible. In addition, most brewers want a building with personality, atmosphere and historic characteristics. One brewer explained:

“With beer, experience is of great importance, and in this experience, history plays a role too. The major pilsner breweries also know this and use this in their commercials, where they pour hops in their copper kettles as if they come right off the plant, even though they throw kilos of compressed hops in there behind the screens. In another commercial, they play classical music while they show a lot of craftsmen at work - such as a violin luthier - in order to flaunt their historic, artisanal and skilled work. Therefore, I consider having a nice building that can convey this ambience as fundamental for my brewery”.

Because most breweries value atmosphere, they most often aspire to settle in the city center, as most historic buildings are located there, which “…naturally have a historic and artisanal atmosphere”. Alternatively, microbreweries like to settle in other areas with similar aesthetic and atmospheric qualities, such as gentrified industrial lots. To compensate for the lower amount of visibility and accessibility of the brewery, two participants noted that they considered opening a second location in the city center in the future.

Two brewers viewed a rural farm as the ideal location for the brewery. One of these, whose brewery is currently located on an industrial lot, stated: “At a certain point, we want to work towards having a farm-brewery: a brewery that has on-site production of ingredients of our beer”. De Pimpelmeesch, currently located on a farm, also sees being in the countryside as more desirable than in the city center, but for a different reason: the city center is very busy and has not many parking spots, which would make it difficult for the delivery vans of the suppliers and clients to reach the brewery. Moreover, a farm also has the artisanal ambience that most breweries seek.

5.3.4 LOCATION FACTORS: PUSH, PULL AND KEEP FACTORS

The participants named the following factors that pulled them towards their location: atmosphere, price, visibility, accessibility, proximity of other breweries and proximity to the clients. Price of the location was mentioned most frequently by starting breweries, but as they grow larger and acquire more capital, having atmosphere often becomes the most desired quality. Other than atmosphere, several breweries mentioned that the visibility and accessibility of their brewery was very important to them. Moreover, proximity of the clients and proximity of other breweries were also mentioned as pull factors.

Several push factors were identified. Besides a lack of space and atmosphere, some breweries experienced resistance or hostility from the neighborhood of municipality towards their brewery. “Some people in the neighborhood were against us, which did not make us feel comfortable”. A major problem here are the odors that are produced in the fermentation process, which can form a nuisance and lead to resistance from the neighborhood and municipality alike: “Our upstairs neighbors started complaining about the smell, after which I moved the brewery to this location”. Secondly, a lack of visibility was deemed to be a negative characteristic of their place. Most small breweries sell their beers exclusively on the local market, which requires them to be known by the local population. Moreover, tourists are
important clients for many breweries, which requires them to be located close to other tourist attractions, so they can both be visible and accessible for tourists. Lastly, the majority of the breweries had or wanted to have its own pub on-site, which often make breweries leave areas with a zoning plan that did not allow for this.

Some breweries could not find a better location, which made them satisfied with their current location. However, even when they saw a better location, some decided to stay anyway. Here, several keep factors were at work. Besides the fact that most desired (often historic) locations are relatively expensive, the breweries had often made large investments in their current locations which they had to recover first. Moreover, when a brewery has no further ambitions to expand its production volume, it is often not seen as necessary to find another location. Lastly, some brewers stated that the benefits of the more optimal location were too small in relation to the higher rent or price of the building, which made it more desirable to stay.

5.3.5. CONCLUSION

For nearly all breweries, the most dominant location factor was the ambience of the location: it needs to appear to the consumer as being historic, authentic and artisanal. Moreover, visibility and accessibility were deemed to be important characteristics, because many breweries organize brewery tours and sell beer on site, which required them to be known among locals and tourists and to be accessible. Since these factors are deemed to be important, most participants aspired to have a location in the city center. However, these locations were often very expensive, which forced most to locate on business estates. Although these locations are lower in price, they often lacked the atmosphere, visibility and accessibility to attract locals and tourists. For this reason, many breweries saw business estates as temporary locations (and are not attached to the place), from where they can move when the brewery grows as a firm. Alternatively, breweries settle on other historic sites with a less central location and lower price, such as industrial lots or rural farms.

5.4: NETWORKS

The last subquestion was: “To what extent are microbreweries embedded in local networks?”. First, we will look at the upstream supply chain (5.4.1.). Here, only the suppliers of barley and hops were studied, as the amount of yeast used is negligible. Next, the downstream supply chain of the microbreweries is examined in sub-paragraph 5.4.2., their relations with other breweries (5.4.3.), with other local initiatives (5.4.4.) and with the municipality (5.4.5.) are elaborated on in the following paragraphs.

5.4.1. THE UPSTREAM SUPPLY CHAIN: SUPPLIERS AND RAW MATERIALS

The foundation ‘Streekeigen producten Nederland’ (Regionally grown products Netherlands) considers a product to be a regional product when all of the product’s basic ingredients are produced and processed within the boundaries of the province (Erkend Streekproduct, 2015). According to this definition, none of the breweries included in this study produce regional
products, because in all cases the raw materials needed for beer production (barley and hops) were either sourced or processed beyond the province.

All breweries regarded using locally produced raw materials as beneficial to their brewery, because these allegedly reinforce the local, small scale and artisanal image of the brewery. However, most breweries did not use raw materials from the Netherlands, and none exclusively used ingredients from their own place, province or country. Only three of the twelve breweries included in this study used barley grown in their own province, and had to approach regional farmers in their social network and ask them to grow barley for them. Therefore, these three breweries all proudly communicate the localness of their products on their websites, even though some beers were amalgamated with non-local hops (Brouwerij Wageningen, 2015; Twentse Bierbrouwerij, n.d.; Hettinga Bier, 2014).

Similarly, three of the twelve breweries grew some of the hops they used themselves. Nevertheless, the bulk of the participating breweries bought their raw materials from wholesalers such as SBI, Brouwland, Jubbega and Brouwmarkt. In total, the breweries that did not use locally or regionally produced raw materials gave four reasons why they could not source their input materials from nearby:

1) Commercial producers and processors of barley and hops (the main ingredients of beer) are often absent in the region.
2) This process of setting up and maintaining a relationship with a local supplier requires much time and effort.
3) Using local ingredients has some risks.
4) Using local and biological ingredients drives up the price of the beer.

5.4.1.1. Commercial producers and processors of basic ingredients are often absent in the region.
None of the breweries could entirely localize their input materials. Barley could not be localized for two reasons. First, some brewers use different types of barley to get variety in beer, which makes local production difficult, as this would require a brewery to either work with several suppliers or to have a farmer grow several types of barley. Some breweries overcome this problem by teaming up and purchase barley together, but this approach is at odds with breweries that practice a more isolationist strategy and do not want to cooperate with other breweries. Secondly, even in the cases where breweries cooperated with local or regional barley farmers, they still have to transport their barley to malthouses in Germany or Belgium to malt the barley. This is because the malthouses in the Netherlands are either owned by the large breweries such as Heineken or produce a substandard quality, as “malthouses are almost always family businesses where knowledge and methods have been passed on from father to son over many generations, and these methods cannot be easily copied by Dutch malthouses”. One of the brewers also questioned the ability of small brewers to check whether the malts that they receive are in fact the locally produced barley that they have sent to the malthouse. However, this statement was contradicted by several other breweries, who argued that the origin of the malts is always registered and transparent, as this is required by the NVWA.

None of the breweries exclusively used regionally produced hops. This was due to two reasons. First, several participants stated that the only commercial hop farms in the Netherlands supply exclusively to the Gulpener brewery, one of the country’s largest breweries. Secondly, climate plays a role. There are more than 120 hop varieties (Hop Union, 2013), and almost every beer style requires its unique hops. To get variety in the beers, breweries need to use different hops. Often, these have to be imported from other countries, as some beer styles need specific
hops that can only be grown in certain climates, though some can be substituted by other hops that can grow in the region (Olson, n.d.; Olson, 2004).

World hop production for 2014 (in tonnes)

![World hop production](image)

Figure 22: World hop production (Own work, based on Deutsche Hopfenwirtschaftsverband, 2014)

<table>
<thead>
<tr>
<th>Country of origin</th>
<th>Brouwland</th>
<th>Selected Brewing Ingredients [SBI]</th>
<th>Van der Kooy Jubbega</th>
<th>Brouwmarkt</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>22</td>
<td>10</td>
<td>18</td>
<td>17</td>
<td>67</td>
</tr>
<tr>
<td>Germany</td>
<td>6</td>
<td>9</td>
<td>10</td>
<td>11</td>
<td>36</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>2</td>
<td>6</td>
<td>9</td>
<td>6</td>
<td>23</td>
</tr>
<tr>
<td>New Zealand</td>
<td>0</td>
<td>3</td>
<td>5</td>
<td>6</td>
<td>14</td>
</tr>
<tr>
<td>Slovenia</td>
<td>2</td>
<td>2</td>
<td>1</td>
<td>2</td>
<td>7</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>1</td>
<td>1</td>
<td>3</td>
<td>1</td>
<td>6</td>
</tr>
<tr>
<td>Belgium</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>France</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>37</strong></td>
<td><strong>32</strong></td>
<td><strong>46</strong></td>
<td><strong>43</strong></td>
<td><strong>158</strong></td>
</tr>
</tbody>
</table>

Table 2: Number of hops species sold by Brouwland and SBI by country of origin (Own work, based on Brouwland, 2015; SBI, 2015; Van der Kooy Jubbega, 2015; Brouwmarkt, 2015).
In Table 2, one can see that the majority of hop varieties sold by Brouwland, SBI, Jubbega originate from the United States, followed by Germany and the United Kingdom, which is roughly in line with the statistics provided by the Deutsche Hopfenwirtschaftsverband (2014) in figure 22. Unsurprisingly, none of the retailers sell Dutch hops. This reinforces the notion that most microbreweries currently do not use local hops, but instead use hops from the United States and Germany. The participants mentioned using hops from countries as diverse as New Zealand, Israel, the United Kingdom, the United States, Germany and the Czech Republic, which all have their own specific characteristics.

Moreover, since many breweries use a great variety of hops, this would require some local farmers to produce dozens of different hop species in order to be the only hop supplier of the brewery, which, as one brewer stated, “is quite a difficult task”. In other words, even when confronted with the hypothetical situation that they could contract with a hop farmer in the region, several brewers stated that they would need non-local hops anyway. Therefore, the ‘unlocalness’ of hops was less often seen as problematic than un-localness of barley, because the amount of barley needed to make beer far outweighs the amount of hops and because it is often not possible to localize hop production in its entirety.

The fact that Dutch breweries cannot use local input materials is not surprising, as they historically have never been able to completely source their raw materials from the local, as one brewer stated:

“Hops [...] have always been traded and transported throughout Europe in large quantities. [...] And the same goes for barley. Barley has – in the 17th and 18th century – always been brought in from elsewhere; the largest breadbaskets of Europe were the Baltic states and Russia, which supplied the rest of Europe with barley. This trade formed the basis for the Hanseatic League at the end of the Middle Ages, and was the main source of barley for brewing.”

Although there was some domestic barley and hop production at certain points in history, the areal of the Netherlands was nearly always too small to quench the thirst of the large number of Dutch breweries, which made it necessary to import these ingredients (Hornsey, 2003, p. 308; Janssen, 2014, p. 74, 77).

5.4.1.2. Setting up and maintaining a relationship with a local supplier requires much time and effort.

Several brewers stated that the process of setting up and maintaining a relationship with a local supplier requires much time and effort, which most brewers did not have to spare:

“You could have a hop rank here, harvest the hops and use them in your beer. However, you need to know the amount of alpha acids in the hops and you need to be able to prove that they do not contain micro-toxins. For that, you need a laboratory, which I do not have. So I sent a sample to a laboratory in Scotland to test the hops on micro-toxins, which cost me 45 euros. That’s not a lot, but you have to do it. So everyone wants local, but going local has a lot of obstacles.”

This idea that using local raw materials requires a lot of time and effort was confirmed by one of the brewers who predominantly used local hops and barley: “When you get it (hops) off the market, you can just call your supplier at any given moment and say: I want hops. Doing it yourself
requires a lot more planning, because you have your harvest in late summer, and that’s what you have to work with for the rest of the year – if you’re out of hops, you need to get them elsewhere”. Similarly, buying barley or hops from local farmers is less convenient because then raw materials need to be acquired from multiple suppliers, which also requires more effort and coordination.

5.4.1.3. Using local ingredients has some risks.
Locally produced hops are prone to more quality fluctuations, since having only a select number of suppliers from the same region inhibits balancing out differences in quality. Moreover, when the harvest of the partnered local farmer fails, “the brewery needs to refuse the grain and break contract with the local farmer, but I doubt a small brewery is able to do that”. Indeed, breweries that used barley of local farmers were less inclined to switch to another supplier than other breweries, because they had built up “investments in their relations” and formed “relationships based on mutual trust”. The costs of severing such a relationship with their supplier are what Porter (1988, p. 10) calls ‘switching costs’. Given the fact that many participants could not find local suppliers, it seems that local suppliers are relatively hard to come by. Therefore, breaking a relationship with a local supplier means that this relation of trust has to be rebuilt with another more distant supplier, and can mean that the brewery loses its local character and subsequently has to alter its organizational identity. Switching costs were significantly lower when breweries purchased their raw materials from wholesalers, mainly due to the fact that their relations with these wholesalers were often less personal. Moreover, these breweries do not use local or regional ingredients in the first place, so they cannot lose an identity built on the use of local resources. In almost all cases, quality of the ingredients is deemed to be the most important, followed by price and then the localness of the raw materials.

5.4.1.4. Using local and biological ingredients drives up the price of the beer.
Some participants from breweries that did not use local raw materials believed that using local and biological ingredients drives up the price of the beer, and the consumer is not willing to pay more for this. However, this statement was contradicted by the brewers that used local ingredients, as they noted that this was cheaper for them because they could cut out the middle man: “The barley goes straight from the farmer to me, I send it to the malthouse get it back without interference of other parties, which is an economic advantage”.

Most breweries expect that they will switch to local suppliers in the future, because they expect that “some idealists who now have a vegetable garden will probably start cultivating hops and establish hop farms”. In addition, one brewer noted that he wanted to stimulate the local economy: “I’d rather give someone from here a job than some farmer elsewhere”. However, although some breweries can in theory use exclusively local ingredients - and can possibly localize the malting process if a malthouse would be established close to the brewery in the future - this will likely remain a minority, as the Netherlands has never been completely self-sufficient in its resources for beer production and likely never will.

5.4.2. THE DOWNSTREAM SUPPLY CHAIN: OUTLET AND DISTRIBUTION

Smaller breweries most often sell their beers in the form of bottles to restaurants, cafes and liquor stores. In contrast, the larger microbreweries noted that most of their sales come from
draught beer. For two brewers, this involved placing beer taps. One participant notes: “In order to make a living and grow as a brewery, we need to sell volume. We found out that many beer taps in cafes are the property of large breweries, or borrowed from them. In order to grow and compete with the larger breweries, we also needed to place beer taps”. According to a report from SEO Economisch Onderzoek (2013, p. i), 75 percent of all beer sales in the Netherlands in the hotel and catering sector come from enterprises that are tied to breweries, which means that there is a vertical relationship between many large breweries and the hotel and catering sector. This vertical relationship mainly amounts to larger breweries installing taps at bars, restaurants and pubs in exchange for an exclusive purchasing obligation. Therefore, by placing beer taps as well, microbreweries could set foot in the regional beer market that was often dominated by the larger beer breweries.

Nearly all the breweries approached their clients (bars, restaurants, liquor stores) in person, and have frequent contact with their clients. Two breweries – which were both smaller than 100 hL/year - did not personally approach their clients, but were instead approached by all their clients.

Small breweries usually sell their beer exclusively on the local market or in the region. This is mostly out of necessity, as they often do not have a distributor and need to deliver the beer to the client themselves. Aside from the fact that most small breweries cannot afford to outsource distribution, one brewer gave another reason why he preferred self-delivery: “We consciously do not outsource distribution, because these are the first signals you receive, be they complaints or compliments, and we do not want to rely on secondary sources to receive these”. Here, self-delivery is a means for receiving feedback from the client in order to better suit the beer to the tastes of the local market. In addition, most breweries produce so little that they can sell all their beer on the local market without saturation, which lowers the distribution costs. Moreover, by focusing only on the place or region, microbreweries can provide additional service to their clients: “By selling my beer only to clients in a 100 kilometer radius, I can provide supporting service to my clients: when they have a need or problem and call me, I can be there within an hour, whereas a large brewery may take weeks to respond”. Although microbreweries cannot compete with the larger breweries on price, they can beat them by offering a wider range of beer varieties as well as more personal service, which gives them an advantage. Lastly, by selling beers only in their place or region, the beers become more exclusive, which some brewers regarded as augmenting the value of their products:

“My beers do not need to be available everywhere. They (consumers, TH) have to put in a certain amount of effort, just like I do when I am on a holiday and think: damn, I need to stop by that place and get my hands on that beer. Then, there is more value in the product than when Jopen (former microbrewery that has grown larger than 10,000 hL/year and has made deals with several national retailers, TH) is available at every supermarket in the country, because then you lose the idea of a special product; in other words, exclusivity can make niche products interesting from a commercial perspective”.

Where a brewery sells its products is also linked to the identity of the brewery. When a brewery brands itself as local, it mostly produces for the local market because “when you source your ingredients from nearby but ship your beers all over the world, you are not selling a local product anymore, and then you lose your local character”. Again, this reinforces the aforementioned notion that the identity of a brewery demarcates and determines its market: shifting the focus from the local market to the national or international market can harm the local image of a
brewery. Similarly, several breweries are also specific to whom they sell their products on the local market: “Although I cannot discriminate, I only sell my beers to businesses with a regional character. For example, I do not want to supply my beers to a kebab shop”. This is done to preserve and protect the image of a local business. “Warsteiner wanted to get a foot in the door in the Dutch market, and made a deal with the union of Chinese restaurants, and quickly after this, Warsteiner became known as beer for Chinese people, because every Chinese restaurant served Warsteiner”. In other words, doing business with clients that do not have a local character has the risk of severing ties with the original local character of the brewery.

5.4.3. OTHER BREWERIES, THE KBC AND COMPETITION

Most participants have informal contacts with brewers from other breweries, both from the Netherlands and abroad. For the most part, these contacts entail the exchange of knowledge: “you can approach other breweries and receive feedback and information on subjects on which people in other sectors would perhaps be more secretive”. In several cases, participants approached other breweries to ask them where they found their suppliers or if they “know people who work in the machine industry”. Due to this reason, six of the 12 breweries were members of the KBC (Small Brewery Collective), which describes itself as a platform for knowledge exchange and a meeting point for small brewers. However, although some brewers stated they benefitted from their membership of the KBC, most were skeptical about the organization. Several breweries felt that the KBC was not able to accomplish enough for their interests. In addition, some complained about the lack of a list of requirements to enter the KBC, as one brewer noted “more than half of the members are contract brewers, and contract brewers have completely different interests and expectations of what a trade association should be than breweries do”. Moreover, because there are no requirements to join the KBC, some breweries felt that the fact that “anyone can join” could put their own credibility at risk, because they can be grouped together with other breweries with bad reputations that they do not wish to be associated with.

In some cases, cooperation was taken to the next level. One brewery purchased its barley from a farmer in the region together with two other breweries. Similarly, some breweries purchased their raw materials from larger microbreweries when they were starting up, as this offered them “some advice and experience expertise, which helped me with forming my network, doing things or avoiding things”. Two breweries brew beers together with other breweries. Similarly, some breweries brew a part of their beer at other breweries due to a lack of capacity at their own brewery or have huurbrouwers at their own brewery. Lastly, some breweries practice a rather isolationist strategy. More than out of a desire for autonomy, the larger breweries usually do not think that they can benefit from contact or collaboration with other breweries.

In general, the interviewees did not experience a lot of competition with other breweries, and answered either “no competition”, “there is competition, but this does not affect my brewery” or “there is competition, but this is not fierce”. Here, the dominant narrative is that the demand for craft beer is so big that every brewery can sell its beer without saturating the market, and that microbreweries reinforce each other. Moreover, since every brewery tries to be unique in its products and identity, they do not sell the same product, and are therefore not competitors. Some breweries did experience competition, although this was mostly described as “subtle”. One brewer tells: “One of the breweries who long was the city’s only brewery saw other breweries,
including ours, come into the city with great disquiet. When they organized a beer festival in the city, they could not stop us from signing up and being there as well, but they subsequently tucked us away in a corner. There, you see a little competition”. Another participant experienced differences in competition in pubs and liquor stores:

“For me, there is no competition with other small breweries in the hotel, restaurant and catering business, because they do not have other microbreweries as their suppliers. On the other hand, competition in liquor stores is fierce, because you can be lined up with 200 other breweries, and the odds that your beer is chosen diminish as the variety increases. Then, you have to fight for your place on the shelf. And when you have 200 beers instead of 10, not all can be positioned at eye-level, which leads the breweries with the largest wallet to approach the store owner and buy their place on the eye-level shelf, and press the smaller breweries down to the bottom shelves. So we mostly compete with other microbreweries in liquor stores, and in the hotel and catering sector with the larger breweries such as Amstel, Heineken and Grolsch.”

However, several participants from other breweries contradicted this statement, and argue in turn that the greater the number of beers is that a liquor store sells, the more visitors it attracts, which cancels out the decreased odds that the brewery’s beer is chosen.

Although the number of microbreweries has grown near exponentially since 1985, the mortality rate of microbreweries has stayed roughly the same. This means that most new microbreweries survive, which seems to indicate that the market is not yet saturated and there is still room for new breweries. In spite of the fact that most breweries do not yet experience serious competition, many expect that this will change in the next years. In total, the participants gave four reasons why they think that the number of breweries will dwindle:

1) Saturation: The number of breweries in the Netherlands is still growing, and this will likely lead to a saturation of the market. Especially since the demand for craft beer is currently at an unprecedented peak, many brewers suspect that the general public will find another product, which will lead to a diminishing demand and drive many breweries out of business: “Pilsner was once booming business, but its consumption has been declining since the 1970s, and I fear that craft beer – which is now being hyped – will meet a similar fate”.

2) Regulations: Several new regulations, such as new requirements for the beer labels, will require breweries to modify their labels, so new investments have to be made to change the labels and conduct research, which some breweries cannot afford. Examples are mentioning the NIX18 campaign of the Dutch government and stating the amount of carbohydrates and allergens on the beer label.

3) Quality: Many breweries on the Dutch beer market are said to produce beers with a sub-standard quality. These beers are not brewed with the right techniques or hygiene, mainly as a result of a lack of knowledge. Not only does this harm the public perception of the specific brewery, but it could also damage the reputation of all small breweries (Skelton, 2014, p. 7).

4) Disillusionment: Lastly, many brewers have romantic ideas about having their own brewery, but later find out that it is often not possible to make their brewery viable enough to survive: “I expect that in two years, many microbreweries will have to close their doors, because they have made very large investments, and I don’t believe that many
of them can recoup these investments in the long run”. Thus, for most, having a brewery is what one brewer calls “a fairy tale with a not-so-happy ending”.

### 5.4.4. COLLABORATION WITH OTHER LOCAL INITIATIVES

One particular strong marketing point is cooperation with other local initiatives, which the majority of the studied breweries took part in. For the most part, these were informal relationships where members of the cooperation redirected their customers towards the other partners in the cooperation. Moreover, many sold each other’s products in their stores and organized local events together, and combined their products and services in what one brewer called a “package-deal”: “Sometimes we organize events together with a local cigar shop, a cigar lounge and a tour boat. We gather here and give the customer a beer, after which they get on the boat and they go to the city center. There, they get a cigar from the cigar shop accompanied by another beer from us, and then the boat brings them back here, where we round up the day with a barbecue”. In these events, the breweries usually co-operated with other food and beverage sellers with a local and artisanal image, such as cheese-makers, butchers and bee-keepers, as well as cultural and touristic attractions, such as art expositions and museum-, castle- and bicycle tours. Hence, together with other local players, many microbreweries ‘sell an experience of the place’ to locals and tourists alike. However, most participants who took part in such activities explicitly stated that these cooperations were not formally organized and “everybody still does their own thing”, which reflects their desire for autonomy. Instead, cooperation was seen as just a way of ‘helping each other out’ and “making each other stronger”.

More than bundling services, some breweries turn cooperation into collaboration and make products together with other producers of local, artisanal products. Several breweries work together with cheese-makers, who put their cheeses in a bath of the brewery’s beer and sell this product as beer-cheese and split the profits. Similarly, other collaborative projects included collaboration with bakeries which made bread out of used malts. Several breweries also had plans on the table such as making beer in collaboration with a coffee roastery or making meat stewed in beer together with a local butchery. Lastly, one brewery cooperated with several local art initiatives, and has plans to have a local artist working in their brewery.

### 5.4.5. LOCAL GOVERNMENT

There was a great variation in the experienced support from the local municipality. Most brewers were positive or neutral about the attitude of the municipality towards their brewery. Often, the municipality sees having a local brewery as an effective way to promote their place and attract tourists. Therefore, most brewers stated that the municipality openly expressed its support for their brewery. Here, personal contact and knowledge of the municipality were important, as one brewer explains: “According to the zoning plan, no restaurant, bar or brewery could be located in this place. However, the municipality wanted to preserve this historic building, and acknowledged the touristic and recreational function of our brewery. They already knew us very well, so adjusting the zoning plan was no problem and went very smoothly”.

However, a few breweries complained about the lack of knowledge of the municipality, which led to frustration among the brewers. A recurring point of frustration was the process of applying for an environmental license. “Following the municipalities zoning policy, I registered as
a business specializing in craft food and beverage production. In reaction, I received a reply from the municipality that this was incorrect, and that I should register as a brewery. However, this category – with the accompanying norms and directives - is geared towards large breweries”. Microbreweries have to check the box ‘beer brewery’ on the license application form instead of ‘craft food and beverage production’, but this automatically puts them in the heaviest environmental category. In cases where this occurred, municipalities often did not know what to do and had to check with the zoning plan and other municipalities, which delayed the license application process. It seems that the existing categories in environmental licenses are often not tailored towards small breweries and municipalities lack the knowledge to deal with this problem. Similar findings have been reported by De Bakker, Dagevos, Van den Ham, Van der Mil, Terluin and Van der Wielen (2013; Planbureau voor de Leefomgeving [PBL], 2013, p. 94), who state that niche initiatives often face political barriers in the form of rigid laws and regulations that are mainly focused on conventional, established industries and not suitable for application to niche initiatives.

In two cases, explicit opposition from the municipality was experienced. One participant noted that “In general, governments don’t have a clue what they are dealing with, and human nature entails that when you are not familiar with something, you are automatically against it”. Here, the participant suspected that the municipality opposed his brewery out of a lack of knowledge:

“The local officials asked many questions from which you could deduce they had no idea what they were talking about: how many lorries are we talking about? Where will you put the silos? I tried to advise them and told them to inquire at another municipality that had a small brewery, but they were not willing to admit that they had no idea what they were talking about. That process cost me a lot of negative energy”.

The other participant experienced even more extreme opposition by the municipality. He believed that the municipality favored firms that were dependent on subsidies: “The municipality has a love-hate relationship with entrepreneurs. Although it dislikes businesses, it realizes that it needs entrepreneurs, but on the other hand it prefers to have puppets, firms that are dependent on the municipality for their survival”. When asked to elaborate further on this opposition, he stated:

“[…] In an interview with the local newspaper, the previous alderman openly accused us of unfair competition, because we presumably depended on subsidies from the municipality. First of all, everyone can apply for subsidies, and second: we never received municipal subsidies. I tried to ask the alderman to rectify this, but he refused, because he heard from someone in a pub that this was indeed the case”.

He suspected that this opposition from the municipality was not only due to their lack of knowledge, but was also the result of his attempts to be as autonomous as possible. Due to this opposition, the brewer felt less attached to the place, and wanted to leave. However, he stayed due to investments that he had made in that location, a family that did not want to move and a lack of alternative locations.
5.4.6. CONCLUSION

The upstream supply chain for the interviewed breweries was transnational. Hop production in the Netherlands is near non-existent, since the climate is not suitable for most hop varieties. There is some domestic barley production, but this is insufficient to serve all breweries. Historically the Netherlands has never been completely self-sufficient in barley and hops. Malthouses in the Netherlands are either owned by the large breweries, such as Heineken, or offer insufficient quality to provide an alternative to malthouses in Belgium or Germany.

As a result, raw materials were never entirely sourced from the place, municipality or region, and most breweries did not use raw materials from their own province or place at all. Instead, these are bought from wholesalers that sell hops and barley from all over the world. Although all participants acknowledged that using local resources would be beneficial to their brand, most stated that they either could not get local ingredients or were not willing to invest a great amount of time and effort in setting up local production. The localness of the raw materials was almost always seen as subordinate to price and quality. Although most breweries think that they will shift to local suppliers eventually, their upstream supply chain has yet to be localized, and few will probably be able to completely localize all aspects of the supply chain.

The downstream supply chain of most microbreweries was very local. Many breweries sold their beers exclusively in their city and its immediately surrounding places. Others focused on the region (which often was the province), with some sporadic sales in the rest of the country and abroad, and only one brewery actively exported its beers. This was due to the fact that it was more cost-efficient to focus on the local market, since this market was often seen as not yet saturated. Moreover, small breweries have limited means for transport, and are more able to provide service to spatially proximate clients.

Most breweries had informal contacts with other breweries, mainly in the form of sharing knowledge. However, some breweries cooperate with others by joint acquisition of raw materials, brewing beers together or renting their brewing installations to others.

Through embedding themselves in local networks with producers of other regional products, microbreweries reinforced their image as a local and authentic craft business. Often there was also co-operation or collaboration with local initiatives and cultural institutions. This was usually informal, and not contract based. Moreover, many breweries organized brewery tours and brewing master classes and presented their kettles upon entry of the brewery in order to reinforce their image as transparent, artisanal and historic centers of craftsmanship.

Most participants had a positive or neutral attitude about the municipality, stating that it encouraged the establishment of their brewery. However, zoning plans are often not accommodated for microbreweries, and municipalities that see the first brewery settling in their territory often do not know how to deal with them. This slows down the process of establishing a brewery, but for most this was not a serious obstacle. Only two breweries experienced serious opposition from the municipality, which they explained as being the result of a lack of knowledge and their efforts to be autonomous.
CHAPTER 6: CONCLUSION

The central question in this study was: "How and to what extent are microbreweries attached to their place of establishment?". Most breweries tried to create a local and historic image and made as many local ties as possible, because this presumably creates local loyalty and attracts tourists. Consumers not only buy craft beers based on taste, but also because of the artisanal, small-scale, authentic and local atmosphere that surrounds microbreweries and their products. Five factors have been identified that attach microbreweries to their village or city and inhibit relocation to another place:

1. **The brewery founder(s):** in all cases, the breweries were established in the place of residence of the founder(s) of the brewery. This was due to several reasons. First, most want to minimize travel time, and saw no benefits of locating the brewery somewhere else. Second, pride of their place or even chauvinism plays a role, as all the brewers thought that their place needed its own brewery. Most brewery founders also felt personally attached to their place and identified with it, because they liked their place and were also personally attached to the place because their family lived there.

2. **Place branding:** most breweries made references to the locality, place or region where the brewery was established. Similarly, they made references to local places, history, animals and folklore in the names of their beers. When these references are made, breweries are less inclined to locate the brewery in another place, because the identity of the brewery was partially derived from the place.

3. **Outlet:** most breweries sell their products near exclusively within their own place or region, and have frequent contacts with the liquor stores, cafes, restaurants and bars they supply to.

4. **Product types:** the beers that the brewery sells are often tailored to the tastes of the local market.

5. **Networks with other local initiatives:** most breweries have synergetic relationships with other local initiatives, which include local or regional food producers and artists. These relationships strengthen the attachment to a place.

Breweries are generally not attached to place when it comes to the upstream supply chain. Although some used barley from a provincial farmer and grew some of their hops themselves, none of the breweries could entirely source their input materials from their own place, province or country. Moreover, barley was not malted in the Netherlands, because the Dutch malthouses are either owned by the large breweries or produce malts with a sub-standard quality. Therefore, when utilizing the definition of regional products that Streekeigen Producten Nederland uses, we cannot consider most Dutch microbreweries to be producers of regional products, as most microbreweries are hubs of transnational - or even global - commodity chains. Therefore, although there were many aspects that tied microbreweries to their place of establishment, most breweries were not entirely local.

These findings can be learning points for other niche food production initiatives and municipalities. Niche food production initiatives can strengthen their position on the local market by emphasizing their local ties, as the collected data indicates that the consumer is inclined to prefer local, artisanal products over non-local products. In turn, municipalities can
create policies that better accommodate for microbreweries, as they can attract tourists and therefore can be valuable assets for place marketing.
CHAPTER 7: REFLECTION

To round up this thesis, I will now critically discuss my methods and findings. First, I will review the application of the place attachment framework and the representativeness of this study, after which the findings of this study will be related to finding of other studies and recommendations for further research will be made.

Although the three-dimensional framework of place attachment consisting of place identity, place dependence and networks was useful for this study, it has several problems. After collecting the data, it seemed that these dimensions somewhat overlapped, as these different forms of attachment did not always have clear demarcations and were mutually dependent. This caused some trouble when writing the results, because I found it hard not to repeat myself and had some difficulties to show the many interrelations between the dimensions and sub-dimensions. Lastly, I experienced some difficulties with concept of place attachment, since place - to what the subject of study was attached – varied in scale between the location of the brewery, the village or city and the region. This relative inconsistent use of the term ‘place’ and the inability to accurately define ‘what’ the subject is attached to is a problem that has yet to be resolved in the place attachment literature (Hidalgo & Hernandez, 2001, p. 275; Lewicka, 2010, p. 211-212).

It was difficult to say whether the selected cases were representative for the entire microbrewery scene. Of the circa 80 breweries that were approached to participate in this study, only 12 both responded and agreed to participate. Therefore, there could possibly be a participation bias, as the breweries who felt they were attached to place could be more inclined to participate than those who felt they were not. However, an eventual bias would be nearly inevitable, as there often was little information available about most breweries, which makes it hard to evaluate the representativeness of the cases in relation to the fast changing Dutch microbrewing landscape.

Similar to the findings presented in this study, Flack (1997) and Schnell and Reese (2003, p. 59) also found that references to local places and histories were important aspects of craft beers in the context of the United States, which - as they argue - produce a sense of belonging to locals and offer a chance to share this distinctiveness with newcomers. However, these authors have mostly attributed the success of microbreweries to place branding and creating local loyalty, and have for the most part neglected other factors. In turn, I argue that we as geographers must not overstress the importance of place branding for microbreweries’ success, as nearly all of the studied breweries regard the quality, uniqueness and price of the product as more important for their success than the usage of local branding. What I derive from this is that having a local image is for most breweries a bonus, the icing on the cake, rather than a major success factor. Furthermore, if ‘localness’ was the most determining factor in the success of microbreweries, how then would one explain the rapid growth of several microbreweries that do not use explicit references to place in their enacted identities (e.g. Oedipus)? I find that place branding is very dependent on the business model that the brewery pursues: when a microbrewery is focused on the local or regional market, using local or regional elements in the branding of the brewery does indeed have added value by creating loyalty among local residents and offering tourists a chance to experience the place. Simultaneously, however, it cannot create loyalty with consumers from other markets. Therefore, when a brewery wants to operate beyond the local or regional market, it usually does not explicitly use local branding, because consumers from these places are likely indifferent towards this image. In other words, place
branding can be a beneficial marketing strategy for some microbreweries, but quite likely there are more factors at work.

For the most part, the discussed location theories in chapter two could not sufficiently explain the location preferences of the studied microbreweries. I find that for artisanal enterprises, location is more than just a point on the map with an ideal mix of location factors: it is part of the product they sell. In line with the outcomes of this study, other authors have argued that the emergence of monoliths in the food and beverage industry has in turn awakened a desire in consumer to turn away from processes associated with Modernity, such as mass-production and industrialization. Instead, they have begun to consume more craft products due to the fact that these are associated with authenticity, transparency and quality (Flack, 1997; Schnell & Reese, 2003, 2014, Thurnell-Read, 2014). More than just products with instrumental value, craft beers – and craft products in general - are experienced by the consumer and have a certain emotional value. Therefore, storytelling – the process of transmitting the experience of place - is very important for microbreweries, and in line with Mathews (2015), the results of this study indicate that location is an important part of the storytelling process. For this reason, ‘ambience’ is often deemed to be the most important location factor, which draws microbreweries to historic locations that convey this artisanal ambience, such as city centers, gentrified industrial lots and farms.

Along the line of the findings of this study, Maye (2011, p. 484) found in his study of the British microbrew scene that microbreweries see added value in using local ingredients, but at that moment sourced most their input materials from national or international suppliers. In addition to barley and hops, Maye also looked at the origin of the bottles and barrels that the breweries used, which I did not include in my research. Moreover, they also sold most of their beers on the local or regional market, and branded their product as local.

In their study of the Irish microbrewery scene, McGrath and O’Toole (2013) found that most microbreweries saw value in networking with other breweries and helped each other out, as they could collectively create greater awareness of the industry. This study had similar findings, as most breweries shared knowledge with other breweries and experienced little competition, as saw each other as co-flagbearers of the movement. In an interview with De Volkskrant (2014) - a Dutch newspaper – other microbreweries made similar observations, stating that they reinforced each other and only competed with the larger breweries such as Amstel and Heineken. This differs from Maye’s (2011, p. 484) findings, who found evidence of competition among microbreweries, but in his paper he is unclear on what the production size of the breweries he had studied was.

On a final note, I have some recommendations for further research. Based on the findings of this study, I conclude that the craft beer consumer not only buys beers based on taste, but also desires to be reconnected with the local, desires transparency of the beer production process and wants to buy unique products with an artisanal character. A quantitative study into the preferences of craft beer drinkers could further test some of these findings: does the consumer truly care whether a craft beer is local or not? Alternatively, another study could look at how and to what extent municipalities support microbreweries, and niche food production initiatives in general, as the interviewed brewers experienced varying levels of support.


Hopunion (2013). *The hop variety handbook*. Yakima: Hopunion LLC.


Planbureau voor de Leefomgeving (2013) *De macht van het menu*. Den Haag: PBL.


Figure 23: Flow chart of the beer brewing process (adapted from Encyclopædia Brittanica, 2010).
## APPENDIX B: OVERVIEW OF SCHEDULE AND PARTICIPANTS

<table>
<thead>
<tr>
<th>Date</th>
<th>Brewery name</th>
<th>Location of brewery</th>
<th>Year of establishment</th>
<th>Approximate year production for 2015 (in hL)</th>
<th>Interviewee</th>
<th>Age</th>
<th>Education</th>
</tr>
</thead>
<tbody>
<tr>
<td>29-03-2015</td>
<td>Dorpsbrouwerij De Maar</td>
<td>Jabeek</td>
<td>2003</td>
<td>50</td>
<td>Leon Bemelmans</td>
<td>56</td>
<td>Process engineering</td>
</tr>
<tr>
<td>03-04-2015</td>
<td>Katjelam</td>
<td>Nijmegen</td>
<td>2014</td>
<td>50</td>
<td>Matthias Terpstra</td>
<td>23</td>
<td>Physics</td>
</tr>
<tr>
<td>08-04-2015</td>
<td>Stadsbrouwerij De Hemel</td>
<td>Nijmegen</td>
<td>1996</td>
<td>1400</td>
<td>Herm Hegger</td>
<td>59</td>
<td>Applied home economics</td>
</tr>
<tr>
<td>10-04-2015</td>
<td>Delftse Stadsbrouwerij De Koperen Kat</td>
<td>Delft</td>
<td>2011</td>
<td>480(^b)</td>
<td>Boyd Keijzer</td>
<td>25</td>
<td>Chemistry</td>
</tr>
<tr>
<td>13-04-2015</td>
<td>Oedipus Brewing</td>
<td>Amsterdam</td>
<td>2012</td>
<td>1680(^c)</td>
<td>Rick Nelson</td>
<td>28</td>
<td>Visual arts</td>
</tr>
<tr>
<td>15-04-2015</td>
<td>Zwolse Stadsbrouwerij Hettinga Bier</td>
<td>Zwolle</td>
<td>2007</td>
<td>250</td>
<td>Fokke Hettinga</td>
<td>48</td>
<td>HAS</td>
</tr>
<tr>
<td>17-04-2015</td>
<td>Othmar: Ootmarsummer Bierbrouwerij Heupink &amp; Co.</td>
<td>Ootmarsum</td>
<td>2011</td>
<td>500(^d)</td>
<td>Dirk Heupink</td>
<td>26</td>
<td>Mechanical engineering</td>
</tr>
<tr>
<td>22-04-2015</td>
<td>Jonge Beer</td>
<td>Hoogeveen</td>
<td>2014</td>
<td>50</td>
<td>Jan de Vries</td>
<td>52</td>
<td>Entrepreneurial school, pharmacy</td>
</tr>
<tr>
<td>Date</td>
<td>Brewery name</td>
<td>Location of brewery</td>
<td>Year of establishment</td>
<td>Approximate year production for 2015 (in hL)^a</td>
<td>Interviewee</td>
<td>Age</td>
<td>Education</td>
</tr>
<tr>
<td>------------</td>
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<td>----------------------------------------</td>
</tr>
<tr>
<td>23-04-2015</td>
<td>De Markies</td>
<td>Den Bosch</td>
<td>2009</td>
<td>30</td>
<td>Rik Schuurmans</td>
<td>39</td>
<td>Law, policy oriented environmental studies</td>
</tr>
<tr>
<td>24-04-2015</td>
<td>Brouwerij Wageningen</td>
<td>Wageningen</td>
<td>2013</td>
<td>??? (estimated 100-1,000 hL)</td>
<td>Stefan Duurkoop</td>
<td>33</td>
<td>Bio-process engineering</td>
</tr>
<tr>
<td>28-04-2014</td>
<td>Dorpsbrouwerij De Pimpelmeesch</td>
<td>Chaam</td>
<td>2000</td>
<td>500</td>
<td>Dyann van Alderen</td>
<td>52</td>
<td>Medicine</td>
</tr>
<tr>
<td>29-04-2015</td>
<td>Twentse Brouwerij</td>
<td>Hengelo</td>
<td>2008</td>
<td>6500</td>
<td>Frank Hendriks</td>
<td>46</td>
<td>Hotel management school</td>
</tr>
<tr>
<td>05-06-2015</td>
<td>Delftse Stadsbrouwerij De Koperen Kat</td>
<td>Delft</td>
<td>2011</td>
<td>480^b</td>
<td>Rolf Katte</td>
<td>50</td>
<td>MBO</td>
</tr>
</tbody>
</table>

A: Note that this is a rather tricky statistic, as it can also include beer brewed for huurbrouwerijen and beer brewed at other breweries.
B: Up from approximately 200 hectoliters in the past year.
C: Based on 140 hL in January 2015, up from 20 hectoliters in January 2014.
D: Up from 400 hectoliters in 2014.
APPENDIX C: INTERVIEW GUIDE

Personal background and general information
• Wat is uw leeftijd? *What is your age?*
• Welke opleiding heeft u gehad? *What is your education?*
• Waar woont u momenteel? Sinds wanneer woont u hier? Waarom ging u hier wonen? *Where do you live? Since when do you live there? Why did you move to this place?*
• Waar werkte u voordat u uw brouwerij begon? Werkt u hier nog altijd? *Where did you work before you started the brewery? Do you still live here?*
• Wanneer begon u met bier brouwen? *When did you start brewing beer?*
• Wat waren voor u de redenen om een brouwerij te beginnen? *What reasons did you have to start your own brewery?*
• Hoeveel werknemers heeft uw brouwerij? *How many employees does the brewery have?*
• Welke functie heeft u binnen uw brouwerij? *What is your function in the firm?*
• Is uw brouwerij een bedrijf? Zo ja, is het een fulltime baan? *Is your brewery a commercial firm? If yes, is it a fulltime job?*
• Er is nog geen definitie voor microbrouwerijen in Nederland. Hoe zou u microbrouwerijen definiëren? *At the moment, there is no fixed definition of the term 'microbrewery' in the Netherlands. How would you define the term 'microbrewery'?*

Place identity
• Waarom heeft u uw brouwerij [naam van brouwerij] genoemd? *Why did you name your brewery [brewery name]?*
• Kunt u kort vertellen waar de namen van uw bieren op gebaseerd zijn? *Can you briefly explain what the names of your beers are about?*
• Zijn uw producten verbonden aan uw vestigingsplaats? Zo ja, hoe? *Are your products tied to this locality? If yes, how?*
• Met welke plaats identificeert u zich het meest? Waarom? *What place do you identify with the most?*
• Is dit gevoel veranderd sinds de oprichting van uw brouwerij? *Has this feeling changed since you established the brewery?*

Place dependance and location factors
• Is dit uw eerste vestigingslocatie? Zo nee, waar was u hiervoor gevestigd? Waarom bent u verhuisd? *Is this your first location? If not, where was the brewery located before? Why did you move?*
• Welke factoren speelden een rol bij de locatiekeuze van uw brouwerij? *Which factors were important in the process of choosing a location for your brewery?*
• Wat vind u goed aan uw locatie? *What do you like about your current location?*
• Wat zijn de eigenschappen van uw locatie waar u minder tevreden over bent? *What aspects of your current location don’t you like?*
• Ziet u deze locatie als tijdelijk of permanent voor uw brouwerij? *Do you view this location of the brewery as temporary or permanent?*
• Wat houdt u tegen om uw brouwerij elders te vestigen? *What stops you from locating your brewery somewhere else?*
• Onder welke omstandigheden zou u van locatie veranderen? *Under what circumstances would you move?*

**Networks**

• Kende u mensen die een brouwerij hadden voordat u begon met brouwen? Zo ja, in hoeverre heeft dat u geholpen met het opzetten van uw brouwerij? *Did you know people who were involved in the brewing industry before you started your brewery? If yes, to what extent has that helped you with establishing the brewery?*

• Hoe vond u toeleveranciers van grondstoffen (gerst, hop, flessen, fusten etc.) voor uw producten? Waar zijn zij gevestigd? Wat is voor u belangrijk bij de keuze voor een leverancier? Wanneer zou u switchen van leverancier? Moeten uw leveranciers lokaal zijn? *How did you find suppliers of raw materials (barley, hops, bottles, barrels etc.) for your products? Where are they located? What is most important for you when choosing a supplier? When would you switch to another supplier? Do your suppliers have to be local?*

• Hoe vond u een afzetmarkt voor uw producten? Is deze hoofdzakelijk lokaal, nationaal of internationaal? Wat is uw marketingstrategie (bijv. lokale reclame, organiseren/sponsoren evenementen, internet, mond-op-mond relame)? *How did you find a market for your products? Is this market mainly local, national or international? What marketing strategy do you follow?*

• Hoe en in hoeverre onderhoudt u relaties met consumenten van uw bier? *How and to what extent do you engage with consumers of your beer?*

• Hoe veel contacten/samenwerking heeft u met andere brouwerijen? Zijn zij in deze plaats of region gevestigd? *How much contact/cooperation is there with other breweries? Are they located in this place or region?*

• In hoeverre ervaart u concurrentie met andere kleine en grote brouwerijen op de markt? *To what extent do you experience competition with other small and large breweries on the market?*

• Bent u lid van het Klein Brouwerij Collectief? Waarom werd u lid? Zo niet, waarom niet? *Are you a member of the Klein Brouwerij Collectief? If yes, why did you join the collective? If no, why not?*

• Hoe veel contacten heeft u met andere bedrijven in uw directe omgeving? *How many contacts do you have with other firms in the neighborhood?*

• Zijn er nog andere contacten die belangrijk zijn voor uw brouwerij (lokale overheid, media, cultuurinstellingen)? *Are there other contacts that are important for your brewery (i.e. local government, media, cultural institutions)?*

**Future**

• Welke doelen heeft u voor uw brouwerij voor de komende jaren? *What goals have you envisioned for the brewery for the coming years?*