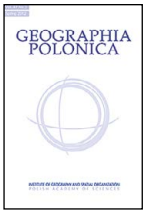

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(RE)CREATING AUTHENTICITY: LOCAL CREATIVITY AND RESOURCES IN THE PRODUCTION OF NATURAL CRAFT SODAS IN POLAND

Michał Męczyński • Ewa Kacprzak • Barbara Maćkiewicz

Faculty of Human Geography and Planning
Adam Mickiewicz University, Poznań
Bogumiła Krygowskiego 10, 61-680 Poznań: Poland
e-mails: micmec@amu.edu.pl (corresponding author) • eja@amu.edu.pl • basic@amu.edu.pl

Abstract

The market for non-alcoholic drinks is increasingly changing towards healthy craft beverages. The change is characterised by the use of high-quality natural ingredients, with no preservatives or artificial ingredients, which resonates with modern society's demanding expectations. Natural craft sodas (NCS) offer an opportunity for development for those entrepreneurs who want to make and promote high-quality products while strengthening local resources. Like all craft products, NCS are associated with authenticity. This paper outlines different perspectives on authenticity and identifies authenticity modes that Polish NCS producers create and refer to. Our study used in-depth interviews and a survey. Producers operating in the growing Polish market for NCS create and refer to all 6 modes of authenticity, but to a varying extent. The types of authenticity they emphasise most strongly is material, biographical and procedural authenticity, followed by oppositional and temporal authenticity. Contrary to expectations, geographical authenticity is less emphasised and, to a certain extent, limited to declarations. While NCS are produced based on local resources, the area of their distribution is much larger (national and international in scope).

Keywords

authenticity • modes of authenticity • craft beverages • market for craft sodas • natural craft sodas • Poland

Introduction

The changes in the food production system that took place at the turn of the millennium due to fast moving globalisation resulted in the development and diversification of the market for beverages. This was due to the increase in the number and role of producers and consumers with higher expectations regarding product quality (Oosterveer, 2003; Feldmann & Hamm, 2015). Two opposing processes took place in the market – an increasing standardisation and homogenisation of production, on the one hand, and its diversification,

on the other (Mol, 2001; Sennett, 2008; Jakob, 2013; Harris, 2014). As regards the former, the production and consumption of beverages produced by global companies became massive in scale. The latter process was more sustainable and was associated with the 'third wave' of craft, which originated at the end of the 1970s (Miller, 2017). It led to an increased interest in small-scale, authentic production among both producers and consumers (McMichael, 2000; Hart, 2019). Authenticity in its modern meaning stands in opposition to both industrial alienation and the associated issues of commercialisation, standardisation and homologation. It completely transformed the entire fields of consumption and production (Gerosa, 2024).

Authenticity became particularly popular among the owners of small businesses producing a limited number and range of food products with a high aesthetic and semiotic content (Scott, 1996), for whom it also became an expression of cultural identity and diversity. This is because for the majority of the world's population, food is not only something they consume, but also a part of culture and life (Arce & Marsden, 1993). Food links nature, human survival, livelihood and culture. Thus, people resist mass production and global consumption standards in this area (McMichael, 2000).

A fashion for authenticity based on the innovative and creative use of local supply chains and traditional local production methods has become a visible element of culture (Autio et al., 2013). A case in point is natural craft soda (NCS). Its production is associated with a local, small-scale and artisanal manufacture based on the production place, tradition, the producer's attachment to a given region, local and organic raw materials and the place of origin of human capital (Zukin, 2008; Zare et al., 2020).

Studies have shown that craft drinks, including NCS, play an increasing role in the market for beverages (Zare et al., 2020). It is difficult to estimate the sales volume of these beverages, but estimates indicate that the global and Polish markets for these drinks are growing fast. The revenue of the global market for non-alcoholic beverages in 2024 is approximately USD 990 billion. The market is projected to expand at 6.7% CAGR (Compound Annual Growth Rate) between 2024 and 2034. Thus, its estimated value in 2034 will be almost USD 1.9 billion. The revenue of the Polish market for non-alcoholic beverages in 2024 is estimated at approximately USD 6 billion, and the market is projected to expand at 4.75% CAGR between 2024 and 2028. The volume of non-alcoholic beverages in Poland in 2024 will be 9.7 billion litres (Global Cold..., 2023). An important role in developing Poland's potential in non-alcoholic beverage production is played by the country's resource base, namely its centuries-old fruit-growing tradition. In 2020, orchards occupied 356 thousand ha in Poland, accounting for 2.5% of the total agricultural area (Główny Urząd Statystyczny, 2023). With an annual yield of over 5 million tonnes, Poland ranks third in terms of the volume of fruit production in the EU (7.7%) after Spain (28.9%) and Italy (26.1%). One characteristic feature of the species structure of fruit production in Poland is that apples, considered to be a Polish national treasure, account for the majority of the fruit grown (80% of the fruit yield, wide range of varieties). Apple production in Poland is steadily growing and in recent years annual apple production has exceeded 4 million tonnes. In 2021, Poland was the largest apple producer in the EU. Given the growing demand for NCS, Poland's strong position as a producer of non-alcoholic drinks and the country's resource base for the production of such beverages, it seems important to investigate the Polish market for NCS.

The present study was carried out based on the concept of authenticity. It had two objectives. Based on a multidisciplinary approach to authenticity, we attempted to adapt the sociological typology of six modes of authenticity proposed by Thurnell-Read for the purpose of geographical research on the example of NCS production in Poland. The second objective was to determine the level of development of the market for NCS

in Poland and identify the modes of authenticity created and narrated by Polish NCS producers.

The paper has 6 sections. The first one is introductory and includes the main research hypotheses and the aim of the study. The second discusses the existing literature on authenticity, including the authenticity of craft beverages. In the third section, we characterise different modes of authenticity in the context of research on NCS with reference to the typology proposed by Thurnell-Read. We then present the methodology of the study and data sources. The fifth section presents the results of the study and provides a discussion. The final section provides conclusions.

Multitude of perspectives on authenticity; conceptualisation of research

There are different approaches to the concept of authenticity in research. In the context of philosophy, the concept of authenticity gained significant prominence thanks to Rousseau (1956), according to whom authenticity refers to something problematic, elusive, but also something that one needs to fight for, not only with a reluctant environment, but also with oneself (Żardecka-Nowak, 2012). He believed that the concept of authenticity also applies to tangible objects. This approach was further developed in sciences relating to culture and artistic activities, in which authentic objects are referred to as original or being of historical value (Zukin, 2008; Miller, 2017; Gerosa, 2024).

As regards geographical and spatial research, the issue of authenticity was discussed in studies on urban space (Cobb, 2014; Gerosa, 2024), which drew attention to tangible objects displayed in public facilities (e.g. libraries, cinemas, concert halls, restaurants), which stand out from the homogenous products of pop culture. Miller (2017; 2019) discussed the concept of authenticity in the context of evolutionary economic geography when investigating the development of craft. The author characterised three waves of craft, with a special focus on the third wave, in which authenticity is particularly important. The geographical aspect was also analysed in papers by Cobb (2014) and Boyle (2004), who discussed authenticity in the context of the local roots of undertakings based on local social capital and supply networks (e.g. Boyle, 2004). The issue of the role of space and place in creating authenticity is also discussed in the guidelines for conservation work presented by UNESCO in 1994 (Nara Document on Authenticity, 1994), stating that authenticity refers to the substance, environment, form, social and cultural function and location of the protected object. In this approach, authenticity is linked not only to the substantial features of the protected object, but also to the place where it is located. The Convention for the Safeguarding of the Intangible Cultural Heritage adopted by UNESCO in 2003 emphasises authenticity gradation and heritage type hierarchy (Lowenthal, 1995; McBryde, 1997; Holtorf & Schadla-Hall, 1999). The issue of authenticity, its gradation and the importance of place was discussed by Ray et al. (2006) in their paper on urban space. The authors note that there are several types of authenticity, including indexical authenticity, which refers to objects that are original.

Based on these approaches to authenticity, it is possible to define the authenticity of a food product. It can be inferred from a paper by Pratt (2007) that food product authenticity has two attributes, which refer to: 1) the location of food production and 2) the nature of the craft activities undertaken. These two aspects usually coexist and are largely based on local tradition, which stands in opposition to modern mass food production. With this approach, it is possible to define NCS, by first taking a broader approach towards the general definition of 'beverage'. Gallo et al. (2019) define beverages (including water) as liquids that are suitable for human consumption and are more essential for life than food. Beverages are divided into: (1) alcoholic beverages, mainly wine, beer and spirits obtained from the distillation of fermented beverages;

and (2) non-alcoholic beverages (soft drinks), which are our main interest. Non-alcoholic beverages include table, mineral and drinking water, nervine (coffee, tea, chamomile, etc.), carbonated (soda, pop) and non-carbonated beverages. Moreover, non-alcoholic beverages include craft beverages, e.g., natural (organic) beverages (others juices, lemonades and syrups) and those that are not organic due to chemical additives. The present article focuses on NCS, i.e., beverages made with water that contain only natural ingredients, including juices, with no added preservatives, artificial flavours, aromas or colourings.

Existing economic geography research dealing with food production authenticity discusses authenticity from the perspective of 1) consumers and 2) producers. The first approach is associated with consumer expectations regarding the quality of products and patterns of its consumption, i.e., so-called culture of consumption (Lim & Londob, 2018), which is influenced by the environment and the atmosphere of the meeting place (e.g., presence of family; Girard, 2016). Shaw (1992) drew attention to the tradition of producing local products and referred to so-called economics of nostalgia. It is associated with the historical character of events relating to culinary arts, for which people have an affection. When organising and participating in culinary events, they recall events from the past with nostalgia (e.g., when talking about old recipes used by previous generations). This perspective could be expanded to include the issue of authenticity of immaterial heritage as production of food does not only involve creating material goods, but is a cultural practice that can be regarded as expanding on the notion of immaterial heritage (Murzyn-Kupisz, 2010).

This area of research also relates to the slow food movement. It advocates for the consumption of authentic food products and helps increase consumer awareness of the importance of healthy local food (Slow food, 2023). Although there is no clear scientific concept behind the movement, it contributes greatly to protecting the interests of local food producers, which is associated with the second perspective on authenticity, namely the producer perspective.

The producer perspective on authenticity is associated with going against global trends and establishing one's competitive position with regard to the production of goods and services. This aligns with the concept of glocalisation (Robertson, 1995) assuming that local production resources will not be dominated by global economic processes, but will rather be used effectively in this process (Kuciński, 2011). One example of glocalisation as regards the culture of consumption is the specific treatment of a local product, e.g., craft drinks, in a given place and its introduction into the global market as a product of local culture (food product or symbol) (see Friedman, 1994; Kowalczyk, 2005). In this respect, producers of authentic food demonstrate characteristics that are consistent with the definition of entrepreneur proposed by Schumpeter, namely the ability to combine resources and resolve to introduce innovative products into the market (see Schumpeter, 1942). They can also be considered to be representatives of the so-called creative class (Florida, 2002). They are often exceptionally talented, creative and have high professional qualifications.

One of the reasons why entrepreneurs decide to produce NCS is the impact of mass food production and the health problems associated with the excessive use of chemical food colours and preservatives (Autio et al., 2013). To address this issue, producers of craft beverages have to develop a unique production chain taking into account the use of local raw materials, tradition and creativity, which, in addition to the place of production, have an impact on the authenticity of craft beverages. The existing studies on the authenticity of production are rooted in e.g., sociology (Thurnell-Reed, 2019, 2022; Thurnell-Reed et al., 2022) and most of them deal with alcoholic beverage production. Moreover, they were carried out in Western European countries, where consumption patterns and income levels are different to those in Poland.

The consumer and producer perspectives offer a glimpse into the important role played by place in shaping product authenticity. As stressed by McMichael (1994) and Castells (2002), locality and place play a special role in food production, which is strongly associated with human life. Goodman (1999) notes that food production manifests a material nature, which is also an inherent manifestation of human, authentic agricultural activity. This particularly applies to organic production (also referred to as healthy food production), which is highly socially engaging (Fine, 1998). Such an approach to the authenticity of food production was taken by e.g., Groves (2001); Pratt (2007) and Li et al. (2021). The existing research on beverages includes a number of studies on the dynamically growing market for craft beer (Acitelli 2013; Garavaglia & Swinnen 2018; Melewar & Skinner, 2020; Wojtyra et al. 2020 a,b; Sgorla, 2023;). There are also publications on other alcoholic beverages (Stryjakiewicz, 1987; Goode & Harrop, 2011; Williams et al., 2020). There are, however, few studies on craft sodas (Levy, 2017; Zare et al., 2020; Levin, 2021; Hoxtell, 2022) and no studies on NCS. The aim of this study was to fill this research gap and shed light on the developing market for these beverages.

It seems that the existing research on food production authenticity, including craft soda production, includes an insufficient number of studies investigating the perspective of entrepreneurs or the significance of the local raw material supplier networks for the manufacture of the final product (see Rachwał, 2008). This is mainly because research on craft beverage production is relatively new. Moreover, the research gap in this regard results from the rapid development of the market for craft fruit beverages as well as unforeseeable changes in the agricultural product market. Thus, the issue should be of wider interest to socioeconomic geographers, due to geographical differences in conditions affecting the market for fruit beverages (including NCS).

Modes of authenticity and their application

Given the definition of 'authentic beverage' used in this paper and based on a literature review, we assumed that it is influenced by the following types of authenticity, as identified by Thurnell-Reed (2019): 1) Procedural 2) Material, 3) Geographical, 4) Temporal, 5) Oppositional, 6) Biographical (Tab. 1). Moreover, it was assumed that authentic products should also be creative.

Ocejo (2017) noted that, in the context of manufacturing authentic craft products, procedural authenticity means full transparency of the production process. According to MacCannell (1976), this involves the possibility for outsiders to learn production details. Therefore, in order to create procedural authenticity, many enterprises organise trips and meetings with customers and people interested in production processes, during which e.g., production lines are demonstrated to visitors. Given the aim of the present study, the question arises of how and in what form Polish producers of craft beverages disseminate information about the production process among potential consumers. According to Thurnell-Read (2019), material authenticity is associated with, on the one hand, the quality of ingredients used to produce an authentic product and, on the other, the significant role of craft producers' ethos, which is associated with the ability to carefully select high-quality ingredients for the final product. Thus, the next question is whether Polish producers of craft beverages use high quality raw materials and attach great importance to the ability to select and present them appropriately.

However, from the perspective of geographical research, geographical authenticity is particularly relevant. Numerous studies (e.g. Cope, 2014; Schnell & Reese, 2014; Thurnell-Read, 2015; Ocejo, 2017) indicate that locality and place play a special role in the narratives used by the producers of authentic products. As noted by Spracklen (2011), many alcoholic beverages are considered valuable and authentic because they come

Table 1. Creative process of authentic craft beverage development

Mode of authenticity	Key aspects of authenticity – characteristics	Authors
PROCEDURAL AUTHENTICITY	• branch tours ('where the magic happens'); • transparency of the manufacturing process ('nothing to hide'); • open characteristics (well-known ingredients); • open to the public ('lovely, fun place to be');	Ocejo (2011, 2017); Luckman (2015); Thurnell-Read (2019);
MATERIAL AUTHENTICITY	• good quality ingredients with superior qualities in terms of tastes, good textures or aromas;	Thurnell-Read (2019);
GEOGRAPHICAL AUTHENTICITY	• locality and place; • value of the product associated with a particular place (e.g., areas of outstanding natural beauty, natural parks);	Zukin (2008); Cope (2014); Ocejo (2017); Thurnell-Read (2019);
TEMPORAL AUTHENTICITY	• 'timeless quality'; referring to the basic traditional process;	Cope (2014); Thurnell-Read (2019);
OPPOSITIONAL AUTHENTICITY	• contrast to the mainstream brands and mass produced products;	Ocejo (2017); Thurnell-Read (2019); Gerosa (2024);
BIOGRAPHICAL AUTHENTICITY	• expression of the maker's own taste and character and creativity; product elicits strong feelings of pride and self-worth.	Campbell (2005); Thurnell-Read (2019).

Source: Own analysis based on a study by Thurnell-Read (2019)

from e.g., Scotland (e.g., Scottish whiskey). Locality thus becomes a symbol, reflected in production based on traditional and local recipes and the sense of self-worth derived from producing a given product in a given place (Murzyn-Kupisz, 2012). Locality is also often associated with the significant natural values of the production place, including the presence of nature reserves and national parks (Thurnell-Read, 2019). Geographical authenticity also relates to the geographical proximity of actors in the local sales market. In this market, close links are forged between producers and customers based on e.g., trust built based on the quality of products. According to Thurnell-Read (2019), such links can only be forged in conditions that ensure geographical proximity and the possibility for local production.

While the above-mentioned modes of authenticity are easily visible, temporal authenticity is harder to identify (Thurnell-Read, 2019). This type of authenticity is identified based on references to time or tradition relating to the production of a given product. Thus, producers who position their products as authentic usually draw on references to the many years or even centuries of the manufacturing tradition. The attachment to tradition can be seen in the indication of the year in which the undertaking was set up. However, in the case of products intended for young consumers, a long history of operation or production is not important and may deter rather than attract consumers. Young consumers expect advanced solutions that are original and break away from the legacy of the past. Thus, one important problem in the Polish context is to determine which type of temporal authenticity plays a more important role – the one that refers to the legacy of the past or the one that is based on new ideas and modern production processes.

One of the most visible forms of authenticity is authenticity based on the contrast between a given product and other products on the market. Thurnell-Read (2019) refers to this type of authenticity as oppositional authenticity. The growth of small-scale craft firms making small profits is accompanied

by the development of large, capital-rich firms that form oligopolies and are involved in mass production. In consequence, two different types of businesses develop, following different business practices and narrating oppositional authenticity. According to Gerosa (2024), small firms seek to distinguish themselves from large companies that are hegemonic and perceive consumers as passive market participants who are satisfied with mass-produced commodities. In order to narrate the oppositional authenticity of a product, it is necessary to consider the opinions and expectations of a given group of customers rather imposing certain purchasing patterns on them. Small producers who create such authenticity have lower financial expectations compared to large firms. Firms that want to differentiate their products on the market try to give them personality and visibility. However, as noted by Thurnell-Read (2019), this strategy, may lead to an increase in production volumes and profits. This may result in the deterioration of the quality of the product, a switch to large-scale production and the loss of the product's authenticity. Thus, two questions arise: whether and to what extent the scale of NCS production is increasing in Poland and whether its potential increase will result in the loss of oppositional authenticity

The modes of authenticity discussed above are associated with the product and the place and manner of its production. The next type of authenticity mainly relates to the maker and is referred to as biographical authenticity. It is associated with the maker's individual development path. According to Campbell (2005), the product is a reflection of the maker's character and elicits feelings of pride and self-worth. Craft producers experience such emotions when e.g. they find their product in a trendy shop or restaurant or win an award at a fair or exhibition. Such satisfaction is typical of people working in the culture and creative sector, representing so-called creative class (Florida, 2002). Therefore, craftsmen who make authentic products can also be considered members of the creative class (Luckman, 2015). As noted by Beck (2000), the strong identification of craft producers with their business activity can often be expressed in the phrase "me and company". The close relationship between a craft producer and their company and product is also a manifestation of the holistic quality of craft (Korn, 2013). Craft brings together materials, ideas and the maker through the complexity of experiences, self-growth and development of entrepreneurship skills (Schumpeter, 1942). Therefore, the product is an expression of the true (often newly-discovered) nature of its maker (Frosh, 2001). Thus, skilfully displayed biographical authenticity often becomes an important element of marketing.

Methods and data

The first stage of the study involved desk research. We analysed the existing literature on authenticity and the functioning of the market for craft beverages. Following the literature review, we developed a research idea based on a multidimensional understanding of authenticity using the approach proposed by Thurnell-Read (2019). We also reviewed specialist websites, papers and material relating to the Polish market for craft fruit beverages.

In the next stage of the study, a structured in-depth interview (a 90-minute telephone conversation) with an expert – a pioneer in the production of craft fruit beverages – was a source of valuable information. In-depth interviews are often used to learn about and understand the experience of people involved in a given issue, allowing for in-depth analysis (Kvale & Brinkman, 2009; Seidman, 2019; Yeo et al., 2013).

The next step was to identify companies producing NCS in Poland. We identified 14 companies, whom we invited to participate in our survey conducted between March and June 2020. A request to take part in the survey and the survey questionnaire were sent to the persons leading the companies identified. We then contacted them by phone and once again invited them to participate

in the study. Seven (50%) companies (P1-P7) agreed to take part in the survey (Fig.1). Respondents returned the completed questionnaire or chose to answer the questions during a telephone conversation. The survey questionnaire included 48 questions (open, closed, multiple-choice). They related to the history of the company and the production process of craft fruit beverages, human resources and their importance for the development of production, the raw materials used, scale of production and the distribution and promotion of beverages. The questions related to authenticity and creativity were formulated following an extensive review of the literature. However, we primarily focused on the concept of authenticity as proposed by Ocejo (2011), Thurnell-Read (2019, 2022), and Thurnell-Read et al. (2022).

We also analysed the data and information published on the companies' websites. Furthermore, we used the case study method, which enables a detailed analysis of complex spatial, social and economic concepts. The method refers to real-world phenomena, enables generalisations based on a well-documented case and helps avoid potential research errors (Flyvbjerg, 2006; Voss et al., 2002; Yin, 2018).

In the last stage of the study, we analysed its results in relation to the research idea adopted. The procedure enabled an in-depth, multidimensional assessment of the level of development of the market for craft fruit beverages in Poland and identification of the modes of authenticity created and narrated by the companies surveyed.

Results and discussion

Polish market for NCS

The production of NCS is a new trend in the market for craft sodas in Poland, which emerged in the second decade of the 21st century. It was initiated in 2010 by two companies (P6 and P7), whose founders were inspired by the market for craft beverages in other Western European countries. Not only did they identify a market gap, but also wanted to create a new, original, high-quality natural carbonated drink.

> *"I was inspired by Berlin's alternative scene and my first contact with beverages other than Coca Cola or Pepsi"* and the result were *"exceptionally fruity and refreshing lemonades."* (P7)

> *"Trips, love of Yerba Mate, lack of alternatives to mass-produced products, very limited choice of beverages. When we visited restaurants and bars with our friends, we basically found only mass-produced products advertised on TV, which unfortunately were often of dubious quality."* (P6)

This resulted in the development of the first Polish drink based on Yerba Mate with "a hint of fruity sweetness and refreshing bubbles". While the sodas produced by the two companies were considered niche beverages, they successfully competed with the products of global players found on the shelves of trendy pubs in large cities. The Polish producers of such niche beverages were '(...) labelled as the makers of drinks for hipsters' (Dębek, 2013). Other companies started producing NCS several years later (P1 and P2 – 2016, P3 – 2020, P4 – 2014, P5 – 2017) and were mainly motivated by the desire to keep up with their competitors and make larger profits (P1-P4). Most of them increased their product range using the raw materials at their disposal (P1, P2, P4). One of the producers (P5) stated that as a fan of 'healthy lifestyle and nutrition' he had noticed that the Polish NCS marked lacked in beverages sweetened only with honey and had decided to start to produce such drinks. Our study showed that after 10 years (in 2020), there were 14 companies operating in the Polish market for NCS (7-fold increase). The market is in an initial development phase and shows certain trends that could be seen during the 'craft beer revolution' characterised by an increase in quality, understood as the diversification of the range of products offered by breweries (Garavaglia

& Swinnen, 2018; Wojtyra et al., 2020a). The growth of craft breweries in post-socialist Central European countries started to gain momentum only in the 21st century (Wojtyra et al., 2020b). The development of the market for NCS in Poland is in line with the latest trends observed in the global market for beverages. Craft sodas are becoming increasingly popular among consumers (Zare et al., 2020). Moreover, "fruit flavours aren't just for juice anymore. (...) fruit has become one of the hottest beverage trends sweeping the globe, with consumer interest in traditional and exotic fruit flavours in soda and carbonated drinks higher than ever. (...) Manufacturers are definitely picking up on this beverage trend and responding by introducing a large number of new flavoured beverages to meet consumer demand" (Feeling Fruity..., 2021). Moreover, consumers are increasingly aware of the dietetic values of beverages and look for alternatives to very sweet or artificially sweetened carbonated beverages (Harris, 2014). At the same time, governments levy taxes on sweetened drinks (Alsukaita et al., 2020; Lowery et al., 2024).

The survey showed that only three of the producers have their own production plants, while the rest outsource the production of beverages to third parties. As noted by Dicken (2011), in the age of globalisation, outsourcing is one of the most common strategies used by undertakings. It allows them to focus on those activities that are key to achieving a competitive advantage and outsource other essential activities to third parties. The volume of NCS production has continued to vary significantly (Tab. 2). With most of the firms surveyed, the production volume in the first year of their operation was small and did not exceed 50 thousand bottles. However, one producer (P2) produced 1.5 million bottles at the start of its operation. In the following years, almost all the producers increased their production volumes (except for P5). The increase varied greatly, ranging from 200% to 25,000%. While P6 did not provide relevant details, the interview with the expert and the materials we analysed showed that it increased its production volume and is one of the main producers of NCS in Poland. This was undoubtedly due to growing demand. According to the expert, the beverages were popular mainly among young people. This is consistent with the observations by Zare et al. (2020, p.2), who noted that in North America, the consumption of craft beverages "is a new, emerging trend among millennials". It seems that demand for such beverages remains strong given that most of the respondents stated that they intended to further increase their production. Only one firm plans to continue to produce 7,500 bottles a year. Fox Miller (2017) noted that those American craft breweries that try to increase production volumes are viewed with suspicion by consumers and accused of 'selling out'. However, American breweries can only be considered to be

Table 2. Production scale in the firms surveyed

Volume of production	Producers						
	P1	P2	P3	P4	P5	P6	P7
	number of bottles						
In the first year of operation	10000	1500000	3765	500	45000	-	20000
In 2019	500000	3000000	26745*	7500	22000	-	5000000
Increase/decrease (%)	5000	200	710	1500	49	-	25000
Plans	increase	increase	increase	at the 2019 level	increase	increase	increase

- no data
* 2021
Source: own compilation on the basis of survey results

craft breweries if they produce 6 million barrels a year or less (Brewers Association, 2024). None of the firms surveyed has exceeded this production volume. However, future research should take into account the impact of an increase in production on the authenticity of NCS in Poland. Indeed, findings from a study by Tregear (2005: 10) on the goals of UK artisan food producers indicate that contrary to expectations, craft producers "(...) have shown quite strong commercial ambitions and growth goals" and, according to the classification by Hornaday's (1990), they "(...) fit more naturally into the Promoter category (striving for independence, exploiting growth, striving for wealth) than into the Craft category".

Procedural authenticity

All NCS producers stressed their direct, personal involvement in the entire production process, from the development of the formula and selection of ingredients to quality control. Similarly to the producers of alcoholic craft beverages surveyed by Thurnell-Read (2019), the NCS producers of surveyed in the present study emphasised that they fully control the production process.

> *"We are actually strongly involved in the production process as we want to, and do, control every part of it, from the purchase of raw materials to the production of our bottled beverage."* (P7)

The producers also stressed the importance of the processual approach to production.

> *"We choose ingredients for our juices ourselves. Each of us prepares their own flavour composition, writing down the proportions of ingredients. Then, we carry out tests to check if the taste has not changed. It is crucial that the beverage tastes the same no matter how long you have stored it*." (P1)

According to Thurnell-Read et al. (2022: 10), "(...) authenticity is processual because the processes by which it is claimed and communicated are central to understanding its meaning, purpose and value".

In contrast to the findings by Ocejo (2017) and Thurnell-Read (2019), which showed that craft producers attach great importance to 'displaying' authenticity by purposefully giving the public an insight into the internal functioning of their production plants, Polish producers of NCS do not make their manufacturing plants available to visitors to increase the visibility and transparency of the manufacturing process. In the case of Polish producers, the Internet (virtual walks around e.g., orchards, etc.) replaced tours of production facilities. While they occasionally organise tours demonstrating the production lines to visitors, the service is not common or widely available. Information about the production process, including the ingredients used, is provided to the potential consumers of NCS using a traditional form of marketing, i.e. labels.

> *"Our sodas cannot compete in terms of price with the well-known brands of large companies. However, you only have to read the list of ingredients on the label to see the difference between our products and those offered by large firms. And this is our strength."* (P7)

Online marketing, including company websites and social networking sites, with short videos on YouTube or Facebook and vlogs by influencers, is also important. Modern telecommunication technologies are used to help customers discover traditional 'old' raw materials, e.g., gooseberries, by presenting them in a new way.

> "*We use the #StraightFromPolish Działka hashtag, which was positively received. People remind themselves about gooseberries and recall that they liked the fruit very much*." (P1)

Moreover, the producers highlighted the transparency of the production process

through participation in HORECA[1] fairs and festivals promoting high quality food products.

Material authenticity

All the producers stated that their NCS contain only high-quality, natural, carefully selected ingredients. They emphasised- that they do not use preservatives or artificial colourings. Our findings are consistent with the observation by Zare et al. (2020) that, by definition, craft beverages contain more natural ingredients.

> *We rely on simple composition. We use no preservatives and add no sugar. We believe that processed products can be naturally delicious."* (P2)

> *All the raw materials we use are organic. As a family business, we know the importance of healthy nutrition – that is why our lemonades contain no colourings or preservatives."* (P3)

> *"(...) We add no preservatives. All ingredients are natural."* (P6)

> *"Lemonade (...) is mainly made using fruit! It plays a key role in our product. Therefore, we use no preservatives or artificial colourings. Our carbonated lemonade (...) offers the taste and aroma of an orchard closed in a glass bottle."* (P7)

However, only two producers stated that their beverages contain only certified organic ingredients. Moreover, the producers drew attention to such aspects as using cane sugar and honey and emphasised that their products have a low sugar content (2-3%) or contain no sugar.

> "*We do not add any sugar. We are only interested in simple ingredients in good proportions."* (P2)

> "*We oppose everything that is sweetened with white, brown or cane sugar."* (P5)

> *"It also contains no sugar, as it is not natural. All sweetening ingredients result from the cold pressing of apples, pears and grapes."* (P6)

By emphasising the high quality and naturalness of the raw materials, the producers highlighted the authenticity of their beverages and showed that they stay true to the producer's ethos and reject the idea of using poor quality products.

> *"The quality of beverages made from natural juices is reflected in their price, which is relatively high. One retail chain offered to add our product to its offering provided that we reduce its price. When we told them that we cannot lower the price, they suggested we make a cheaper alternative. We refused. During the fairs we took part in, we had around 20 offers to use concentrates and additives, which would, of course, reduce the price of our products. We do not want to do that. It makes no sense. We will not reduce the quality of our products. We want them to have unparalleled flavour. We do not want to do something that will be short-lasting."* (P1)

The companies use Poland's fruit growing potential (Fig. 1), which is based on a centuries-old tradition (Hammond, 1996). Two producers cultivate fruit trees and bushes. Thus, they fully control the quality of the fruit used to make their beverages.

> "*We produce our pressed apple juices and drinks ourselves from our fruit and from the fruit grown by our neighbours."* (P2)

> *"First of all, we grow fruit ourselves. We have our own plantations of gooseberries, raspberries and currants."* (P1)

[1] HORECA– Hotel, Restaurant and Catering sector

All the producers choose suppliers based on the quality of the raw material they offer. Moreover, most of them underscored the production method.

> *"To create a brand of delicious drinks you have to have the right ingredients. We cooperate with the owners of orchards cultivated from generation to generation, where healthy fruit is grown. Our partners do not use any aerosols, chemicals or artificial fertilisers, so their fruit has a varied and full flavour."* (P3)

Slightly less than half of the producers cited the price of the product (3 producers) and the place where it is produced (3 producers). The vast majority of producers stated that the name of their craft lemonade refers directly to the raw material used to make it. One producer stressed that the name of their product is to draw attention not only to the raw material but also to the uniqueness of the product. Only one producer chose a completely different approach. The name of their lemonade is a word play and is completely unrelated to the ingredients of the drink. Our findings are in line with the observation by Cerstiaens (2023), who noted that the inclusion of natural

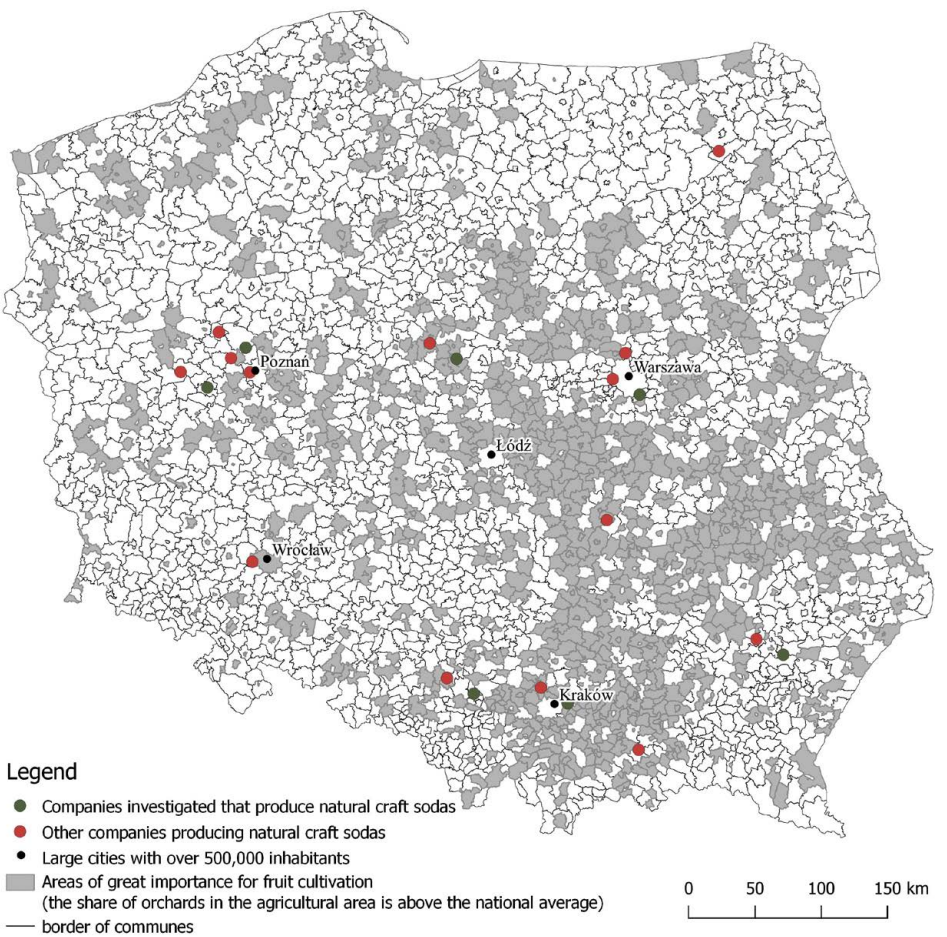

Figure 1. Companies producing NCS against the backdroph of the orchards production in 2020

fruit ingredients is not only a trend, but also a change in paradigm. It aligns with modern society's demanding expectations and has the potential to redefine the market for non-alcoholic beverages.

The producers also stressed the importance of packaging, the packaging material and the fact that it is recyclable as well as transparent information about the ingredients of the beverage, e.g., 'no sugar', 'low-calorie', '100% vegan', 'natural ingredients'. From the production perspective, packaging and its content must be consistent. Therefore, packaging, e.g., one that is biodegradable and contains a product that has an exceptional flavour and is made from high-quality raw materials, is very important. Packaging and its content are integral parts of an authentic product.

> *"(...)the raw materials used – glass, paper, as well as a short list of ingredients, information that the product contains no added sugar, information that the beverage contains cold pressed apple juice."* (P2)

> "(...) *we chose the bottles ourselves. The design is in the style of the 1950s. And when was the gooseberry popular? (laughs)."* (P1)

For the Polish producers of NCS, it was crucial to focus on the quality of raw materials, which is a characteristic feature of the third wave of craft (Fox Miller, 2017; Luckman, 2015). Commitment to quality and careful selection of ingredients is crucial in e.g., the production of craft beer (Fox Miller, 2017; Wojtyra et al., 2020a, b; Sgorla, 2023). Zara et al. (2020) note that in the NCS sector, locally produced, natural ingredients, high quality, freshness and creative flavours are appreciated by millennials.

Geographical authenticity

The vast majority of the beverages are based on local raw materials, mainly fruit (apples, pears, gooseberries and blackcurrants), rhubarb and water. It is one of the strategies used by the NCS producers to distinguish their products from those offered by well-known brands (Zare et al., 2020). However, individual beverages differed in terms of the origin of the raw materials, with only one produced using only local raw materials. Four are made using primarily raw materials purchased from Polish producers (local, regional, national), five using raw materials purchased from foreign producers, which, however, usually make up a smaller proportion of the total ingredients. In the case of only two beverages, the amount of raw materials purchased from foreign producers, mainly from southern Europe, was equal to that purchased from Polish producers. Being associated with a specific town or area is often a key means to distinguish craft beverages from national and international brands (Thurnell-Read, 2019). More than half of the producers believe that their products draw on local traditions, which is mainly manifested in the use of regional/local raw materials. Moreover, two producers stressed that the link between their products and local tradition is also manifested in the use of old recipes and production methods.

> *"For us it is very important that most of our suppliers come from Silesia. We want to support local businesses. From the very beginning, we knew that we would establish cooperation with Silesian businesses. However, to show our openness, we also cooperate with several suppliers from outside the region. (...) We strongly emphasise our attachment to the region. Information about it can even be found on the labels on our beverages. We are very proud of it."* (P7)

> *"The flavours of our lemonades are strongly related to our region. Our beverages taste like compotes made by our grandmothers. We have modernised it all – using old recipes, we created new flavours rooted in tradition. We are from here. Why should we make beverages from e.g. oranges?"* (P7)

However, despite the strong references to the region declared by the producer cited above, the labels on their NCS and their advertising on the Internet only include information that the products were produced in Poland. Undoubtedly, however, the reference to the region and its tradition declared by the producer is emphasised by the post-industrial building housing the firm's head office. A raw, industrial image lends authenticity to craft producers by recalling images of a time when production was a more central element of the landscape and by offering hope for a productive, albeit alternative, future (Fox Miller, 2017).

The association with the region can clearly be seen in the manner of development and coverage of the producers' distribution networks. Three producers have their own production facilities. The others outsource production. The distance between the head office and the production facility varies, usually not exceeding 150 km. In two cases, the head office and the production facility are located in the same place. At the very beginning, most of the companies sold their products in their immediate environment, i.e., within one province. Several producers (3) distributed their beverages themselves.

> "*We distributed the first bottles ourselves or with the help of our friends.*" (P6)

> "*We distribute our products ourselves. At the beginning, we only had one outlet. Now, there are several hundred of them.*" (P7)

Most producers developed their distribution network locally by looking for distributors, such as wholesalers, small shops, food establishments. They also stated that they participated in trade fairs to establish commercial relations. Only two producers distributed their beverages through large retail chains during the start-up phase.

> *"At first, we developed our distribution network by building partnerships with local wholesalers and distributors. Then we started to cooperate with larger ones.*" (P6)

Such an approach is typical since, as noted by Zare et al. (2020, p. 538) "craft beverages are by nature typically artisanal, locally produced and marketed, but also loyally purchased by their customers".

Currently, the distribution area for the beverages is significantly wider. Only one producer continues to distribute their products locally – within one region. Three distribute their products on a national scale. Three others also sell their products abroad, with one of them operating in as many as 14 countries.

> *"We cooperate with local distributors in the largest cities in Poland and e.g., in the HoReCa sector. (...) We have received an increasing number of enquiries from shops, distributors and individual customers.*"

> "*Today, our products are available in chain stores, retail stores and ORLEN service stations. We continue to develop our distribution, particularly in traditional distribution channels, i.e., in small non-chain stores*." (P2)

The "Pij polskie soki" (Eng. "Drink Polish juices") programme launched in 2018 by Polski Koncern Naftowy Orlen SA, under which fruit juices from Polish producers began to be sold at all Orlen's filling stations, offered an opportunity to gain access to a national distribution network. The programme was a response to the difficult situation in the soft fruit market and was aimed at supporting Polish fruit growers and local (often family) processing businesses. It also aimed to increase the product range offered to people interested in Polish products (Nowa gazeta..., 2018). Three of the producers surveyed participated in the programme. It appealed to local patriotism since greater identification with endangered local food producers increases the willingness of consumers to help them (e.g. Skallerud & Wien, 2019).

Two largest producers, whose products are distributed internationally, tend to target their products at hipster culture representatives, rather than at local consumers. The hipster label turned out to be most useful to describe the common aesthetics and taste orientation embraced by the economy, entrepreneurs and customers, all of them being centred on the experience of authenticity (Gerosa, 2024).

Temporal authenticity

The production of NCS is a response to trends similar to those observed by Thurnell-Read (2019) among the producers of craft alcoholic beverages. Producers of NCS also base their activities on tradition and, on the other hand, distance themselves from tradition, looking for something completely new that would correspond to contemporary tastes. Some of the producers clearly referred to the legacy of the past with nostalgia.

> *"A rich variety of flavours – raspberry, currant, rhubarb, we also add ginger, which goes very well with gooseberries. Flavours of childhood, rhubarb pies, first fruit of the year picked in the grandmother's garden, compotes, jams... Everyone remembers that. Our products are crazy well received*." (P1)

Other producers focus on innovative ideas and modern production methods. One of them even stated that their products drive trends rather than follow them.

> "*We have introduced a unique, innovative drink into the Polish market. Therefore, it is challenging to familiarise customers with the new product category*." (P2)

> "*We drive trends*." (P7)

All the producers emphasised such aspects as healthy lifestyle, ecology, responsibility and honesty in business.

The narratives solicited from the producers included references to the past and traditional flavours. However, they were not of primary focus. The need to meet the demands of "an internet generation, a wireless generation" in terms of tastes and dietetic properties was emphasised more strongly (Thurnell-Read, 2019: 8).

Oppositional authenticity

The oppositional authenticity of NCS is created based on contrasting two different patterns of business behaviour. As noted by Bourdieu (1984), the oppositional contrast is often based on the volume of consumption, possession and knowledge. They constitute one type of cultural capital and are imbricated in the process of differentiation, namely the reproduction and creation of social boundaries (Pratt, 2007).

Our findings seem to confirm the strong contrast between the behaviour of NCS producers and that of mass producers. Thus, they are in line with the theoretical assumptions of the concept of the dichotomous development of the economy by Braudel (1977) and the concept of the diversity of behaviour of entrepreneurs by Bourdieu (1984). The producers surveyed perceived the natural, health-beneficial composition of NCS as the most important factor distinguishing craft lemonades from mainstream beverages. The contrast aligns with the assumptions of the oppositional mode of authenticity, as defined by Thurnell-Read (2019).

> *"We will not compromise on the quality of the ingredients we use. We do not use cheaper alternatives to raw materials. We are authentic*." (P6)

> "*Our beverage is a healthy alternative to mass-produced carbonated drinks both for adults and for children*." (P2)

Moreover, one producer clearly stated that their aim was not only to introduce natural low-calorie NCS into the market, but also

to create a healthy alternative to harmful mass-produced energy drinks. This statement confirms that Polish NCS producers create authenticity by narrating that their products are beneficial to consumer health.

> "*The world is moving forward. For a long time, only high-calorie beverages were available on the Polish market. People increasingly care about their health and pay attention to what they eat and drink. We filled that niche. We created a very tasty and healthy drink*." (P7)

> "*I think that it is possible to create a drink that contains only natural ingredients, tastes great and supports a healthy lifestyle*." (P5)

Several of the producers stressed that, mainly due to the high quality of the ingredients used, their beverages are more expensive than those offered by large industrial groups and cannot compete with them in terms of price. At the same time, they firmly believe that it is necessary to oppose mass production and not to seek to maximise profits at the expense of lower product quality. While mass production would make it possible to sell beverages at a lower price, it would result in the loss of their unique character, which would disappoint their original customers, who look for high quality products. Such an attitude is also an element of oppositional authenticity (Pratt, 2007; Thurnell-Read, 2019; Geros, 2024).

Biographical authenticity

The last mode of authenticity largely refers to the character and life path of the beverage maker. Our study demonstrated that a product is often an expression of its maker's character, which is in line with the approach proposed by Campbell (2005).

> "*We have always made sure that each new product we create is authentic – our products must be directly associated with the region, our lifestyle and values and the place where it is produced*." (P4)

When asked about determinants of success in the production of NCS, most of the producers mentioned honesty, intransigence and being true to oneself. This aligns with the traditional approach to defining the authenticity of individuals as proposed by Rousseau (1956). The producers were also honest about their attitude to profits, stating that they should not be the only aim of their activities. They also tend to want to run their business from the heart, according to their own will and independently, which is in line with the definition of entrepreneur proposed by Schumpeter.

> *"I was responsible not only for each new collection but also for the brand strategy. Yes, my work was very rewarding and, in a way, fun. However, it had one drawback – it was not my company."* (P7)

> *"It is difficult to give advice. First of all – being yourself, putting your heart in everything you do rather than being profit-oriented*." (P7)

The producers' statements to a certain extent confirm the assumptions proposed by Clark and Dwight (2006) as regards the freedom of an individual to choose their lifestyle. The producers' choices were based on their life experiences and personal development.

> *"If you want to be seen as credible, you need to be truthful – our lifestyle and memories have an impact on our brain and the subsequent recall. In this case, the flavours that I remember can now be found in our NCS*." (P7)

> "*I remember the lemonade sweetened with honey my grandmother would make when I was a child*." (P5)

> *"First of all, childhood memories, but also lifestyle, because it is the first beverage based on gooseberries in Poland and it stands out."* (P1)

The character and creativity of the producers is reflected in the authenticity of their products. Many of them belong (unintentionally) to the creative class (Florida, 2002) and have experience of working in e.g., the culture sector. However, this experience was only a springboard for their dynamic development.

> *"We have an idea for ourselves and this is what matters the most. (...) we are inspired by the arts."* (P7)

> *"At the beginning, we took part in different events. They mainly included music festivals, as we are very fond of music. However, we were very selective about it. (...) When choosing the events at which to demonstrate our product we were guided by our music taste."* (P7)

Discussions on the creation of biographical authenticity largely come down to the determination of the character traits of the NCS producers. Many of them clearly define their aims and are not willing to compromise. Such an approach may result in conflicts within the company. They also have personal characteristics that are consistent with Schumpeter's definition of an entrepreneur, as well as with Beck's concept of 'me and the company' (2000).

Conclusions

We effectively adapted the typology of six authenticity modes proposed by Thurnell-Read to research on the market for NCS in Poland and demonstrated how these modes are created and narrated by the firms operating in the market. Our findings are consistent with those from a study by Thurnell-Read, which pertained to craft alcoholic beverages. The producers surveyed refer to all modes of authenticity, but to a varying extent.

Our study showed that the Polish market for NCS is at the initial stage of development, with an increasing number of producers and production scale. This is in line with the trends observed in the global market for beverages as regards the use of fruit ingredients. Moreover, the sector in Poland is developing in a similar way to the production of craft beer in Central and Eastern Europe. It can be expected that the Polish market for NCS will continue to grow in the coming years. It seems that the gradual increase in the production volume may jeopardise the craft nature of production and authenticity of NCS.

In their narratives, Polish NCS producers predominantly refer to the material, biographical and procedural modes of authenticity, followed by oppositional and temporal authenticity. Contrary to expectations, geographical authenticity is emphasised to a lesser extent and is largely limited to declarations. While the labels and advertising for the beverages do not provide the name of the production place or region, they usually include information that the product was produced in Poland. From a geographical point of view, the activity of the Polish producers of NCS has a two-fold nature. While they produce their products based on local resources, they distribute them on both a national and international scale.

Editors' note:
Unless otherwise stated, the sources of tables and figures are the authors', on the basis of their own research.

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