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Service logics and strategies of Swedish forestry in the structural shifts of forest ownership: challenging the “old” and shaping the “new”

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ABSTRACT
Sweden is one of the most forested countries in Europe, and it has one of the highest shares of productive forest. Production in forestry is largely reliant on the private non-industrial forest owners, who own half of the forest land. As in many countries, however, forest ownership is changing towards a higher extent of urban, female or non-forestry-background owners. This poses a challenge for the forestry services sector, mainly forest owners’ associations and companies, but also broadly the sector at large. By exploring the sales and marketing processes, this paper analyses the service logics and strategies of Swedish forestry under changing forest ownership, drawing on an interview study covering all the large actors in the Swedish forestry sector. The study illustrates an increased focus of forestry organizations on services from a strategic and managerial perspective, in customer-oriented relationship development and in value creation and sales processes, specifically in order to manage “new” forest owners and the demand of forest industries. The results highlight the domination of service logics associated with timber production and the challenges for the service market and the provision of diversified services to forest owners.

Introduction
Sweden is one of the most forested countries in Europe, and has one of the highest proportions of productive forest (SFA 2014). Half its forest is owned by private individuals, which makes them the largest group of owners in Sweden. A large share of the remaining forest is owned and managed by either private or state-owned companies (39%) (SFA 2014). The majority of these companies also own forest industries. Together with the main four forest owners’ associations (Södra, Mellanskog, Norrskog, and Norra), these organizations constitute the backbone of the Swedish forestry model (Beland Lindahl et al. 2017) that has maintained a high level of forestry activity in Sweden and made a substantial forest-related contribution to the country’s GDP (SFA 2014). Not least, the services provided by forest owners’ associations and industry, including management measures, planning, educations etc., support individual forest owners in their ownership at the same time as it also contribute to the socialisation of them into the sector (Keskitalo 2017).

Nevertheless, the increasing heterogeneity and shifting characteristics of forest ownership in recent decades have been identified as a challenge to the traditional processes by which these timber purchasing organizations mobilize the forest resources (e.g. Lidestav and Arvidsson 2012; Hujala et al. 2013; Mattila and Roos 2014; Häyrinen et al. 2015), not only in Sweden but also in other cases such as Finland and Norway. These changes result from, amongst other things, processes of diversification, urbanization, economic restructuring, and declining economic dependence on forestry (Lidestav and Nordfjell 2005; Berlin et al. 2006; Inge- marson et al. 2006; Nordlund and Westin 2011; Haugen et al. 2016; Keskitalo 2017). From a management perspective, the specific conceptions and understandings of the “new” forest owners also constitute an opportunity in relation to the organization and implementation of new practices and systems. For instance, whereas outreach has traditionally focused on direct contact with forest owners in the specific locality, organizations may now need to consider how to reach an increasingly urbanized population, often with a more limited forestry background (Keskitalo 2017).

These processes are often seen to have resulted in a growing distance between the forestry sector and forest owners (Westin et al. 2017), which has implications on, e.g. the dispersed forest governance systems and their ability to reach and govern forest owners. Forestry in Sweden is largely deregulated, with forestry uses allocated “freedom under responsibility”, with great diversity in practices possible as long as specific aims are reached. This means that the Swedish forest governance systems rely to a great extent on shared social regulatory practices (e.g. shared rationales) amongst forest owners, forest owner organizations, industry, and other players in the sector (Törnqvist 1995; Appelstrand 2012). As owners residing in urban areas are now less
practically involved in the management of their forest (e.g. Follo et al. 2006; Mattila and Roos 2014), they increasingly need to purchase forestry services, for which they are dependent on the counsel and advice of timber purchasing organizations (Haugen et al. 2016). These shared timber production-oriented rationales and logics (Andersson and Keskitalo 2018), over time, lead to an increasing focus on industrial forestry (Mattila and Roos 2014) at the same time as options, for instance towards increasing environmental protection, targeting measures towards amenity values or the like, may not be similarly presented.

At the same time, forestry organizations are faced with having to re-design information and advice services towards groups that, from their perspective, “don’t speak forestry”: who may not be schooled in silvicultural terminology but still need to gain information and knowledge to make decisions about their forests, and who remain legislatively responsible for the management actions undertaken on their properties (Follo 2011; Andersson and Liedestav 2016). This shift in the characteristics of forest owners has been discussed in literature in different countries, referring to changes in various characteristics, in terms of a need to understand the “new” forest owner (e.g. Keskitalo 2017). However, as has been noted in the general discussion of the conception of “new” forest owners (e.g. Hogl et al. 2005; Haugen et al. 2016; Follo et al. 2017; Weiss et al. 2019), the specific and practical implications and effect of these shifting characteristics remain unclear (Keskitalo 2017).

While the role of service in developing business in the Nordic forest sector has been recognized and explored over the last decade (e.g. Toivonen and Hansen 2003; Mattila et al. 2013; Mattila and Roos 2014; Räty et al. 2016; Pelli et al. 2017; Berghäll 2018), most of this research and study remains focused on the forest (processing) industry and its products. Less attention has been given to services in forestry, and many of the studies that do exist have focused on roundwood (e.g. Favada et al. 2009; Erlandsson 2013; Häyrinen et al. 2015; Erlandsson et al. 2017). Research has also shown that benefits which are not purely financial are covered less by forestry service organizations (Häyrinen et al. 2015).

This potentially highlights the effect of the dominant rationales and service logics of forestry organizations, which are mainly focused on providing services, in various ways, to support timber production (Mattila et al. 2013; Mattila and Roos 2014). In the Swedish context, the dominant position of the larger forestry organizations constitutes a major challenge to the development of new, service-oriented enterprises outside the present timber-focused logics (Mattila and Roos 2014). The latest developments in forest-related services have mainly been driven by market-oriented strategies (Hansen et al. 2006; Toppinen et al. 2014) and recognize the importance of increasing numbers of urban owners, and a larger share of female as well as older forest owners (e.g. Karpinen 1998; Ingemarson et al. 2006; Haugen et al. 2016; Keskitalo 2017). This broad diversity and heterogeneity of forest owners and their wide variety of needs (Hujala et al. 2013; Mattila and Roos 2014; Häyrinen et al. 2015; Berghäll 2018) create a demand for a greater range of services (Nordlund and Westin 2011) and types of information and advice (Toivonen et al. 2005). However, as Mattila et al. (2013) stress in the Finnish context, the main challenges might not be on the customer side of services but instead on the supply side.

Recent literature on forest-related services is dominated by the Service-Dominant Logic (SDL) framework (Mattila et al. 2013; Mattila and Roos 2014; Häyrinen et al. 2015; Matthies et al. 2016; Berghäll 2018), which emphasizes both services as the primary component of all exchanges/markets and the co-creation of value within exchange. However, the normalization of “value” as a general positive outcome of exchange both downplays any economic, social or political dimensions of exchange/markets and neglects inequalities and how they are reproduced within this setting (e.g. Marx 1976). Although these issues have partly been raised, the context of exchange is often perceived as “given” and little attention is placed on the “value creation context”, the “joint value sphere” and its relations, or managerial implications (e.g. Grönroos and Voima 2013). Similar to other marketing literature, SDL has the tendency to overstate consumer demand as a driver of what is consumed (Fine 2013). The idea of mutual processes of co-creation absorbs consumers into the processes of capital reproduction and blurs the distinction between marketer/seller and consumer – within this context, the forest owners. This contributes to commodity exchange being mystified and masking both the use value and the social relations behind production – with the consequence that labour disappears within the framework (cf. Harvey 2014).

Previous scholars have thus highlighted the insufficient accounting for consumers and consumption in terms of cultural, societal, and political considerations within SDL (e.g. Flint 2006; Peñaloza and Venkatesh 2006; Arnould 2013). The conception of value emphasizes that the SDL framework is not really focused on theorizing services as market offerings, but instead constructs all acts of consumption as constitutive of service provision (Hietanen et al. 2017).

On this basis, it is thus relevant to critically examine the meaning-making, relationship-management, and sales processes of forestry organizations in relation to the shifting forest owner basis and their adaptations in sales, communications, and services to changing forest owner characteristics (cf. Morgan 1992; cf. Sturdy and Knights 1996; Hudgson 2001).

Based in the understanding of consumers/forest owners, their needs and desires, as both constituted in and of the sale process/marketing, this study scrutinizes the conceptions of the “new” forest owner in forestry organizations, focusing on the adaptation of the specific service logics and strategies of the dominant organizations in forestry. This is done through a critical exploration and analysis of the sales and marketing processes and practices of forestry organizations, on a strategic and managerial level, in relation to service provision/offering, and by theorizing sales, consumption, and service in forestry from a critical management and consumer perspective. The general objective is to better understand the power relations and processes of subjectification, logics and agency within Swedish forestry and the potential implications for the development of both the forestry organizations and forest ownership in particular, and Swedish forestry in general. This means that, in this study, the concept of “new” forest owners, as well as other normative phrases (e.g. good, bad, right and wrong), is based on the perspective,
articulation, and meaning-making of the interviewees and their organizations in order to understand how they construct their understanding and valuation of for instance various forms of sale, consumption, and service offerings.

**Conceptual framework**

In forestry, the tangible and intangible dimensions of forest-based products and service have become increasingly inseparable, especially with the emphasis on environmental responsibility, climate change mitigation, and adaptation within the bioeconomy (Pütlz et al. 2014; Pelli et al. 2017). The shifts in the characteristics of forest ownership in Sweden – e.g. increasing distance and variation in economic dependence on the property and motivations for ownership (Keskitalo 2017) – pose new challenges to the sales relationships, processes, and communications of forestry organizations (cf. Salmon et al. 2006). This partly alters the traditional organization, and calls for the development of more effective means of control in sales. In this context, marketing constitutes a powerful tool that is increasingly being used (Cohen and Kozak 2002).

In other areas, the transition from product-led marketing (Morgan and Sturdy 2000) to the marketing of consumers’ “needs” (Knights et al. 1994, p. 44) is well documented. Despite its late adaptation in relation to other sectors (Cohen and Kozak 2002), this type of change mainly been documented with regard to forest products (e.g. Hansen et al. 2006; Toppinen et al. 2014). With increased customer engagement, marketing presents itself as responding to “needs” (e.g. Marcuse 1966; Baudrillard 1981). It has been suggested that marketing “allow[s]…us to construct, sustain and remodel the self” (Knights and Sturdy 1997, p. 168), but also produces identities through the construction of needs. As a result, communications can contribute to the articulation of higher user value in relation to the construction of needs. In forestry, this struggle over value can be seen in, e.g. the different values to ecosystems that can be, and are being, produced (e.g. Matthies et al. 2016). Understanding the struggle over value and value creation in this way constitutes a significant departure from an SDL framework that takes the processes problematized here as more for granted, and that does not see them as a result of processes involving varying power and interest structures.

In the more critical perspective, however, the transition from system-oriented to person-oriented service development is seen to drive a requirement to have the ability and will to understand but also continuously co-create customers’ needs to be able to fulfil them (Ritzer and Stillman 2001). Streamlining sales processes, market segmentation, and target marketing have been important tools in making the service production and communications more effective. However, partly because they rely on a relatively high degree of homogeneity within segments/target groups to be effective (Kotler 1996), these tools and practices themselves impact the market and form requirements. They thus not only reflect, but also shape, the reality of forest ownership and forestry organization by producing specific subject positions (cf. Knights and Sturdy 1997). These types of practices/tools constitute the basis for relationship marketing, for instance, whereby sales and service development are focused on, e.g. groups of specific “lifestyles” (Desmond 1998). However, it has also been noted that “no matter how sophisticated and scientific the segmentation and market research, consumers may resist or fail to comply with the consumer behaviour expected […] because subjectivity can never be wholly captured and thereby controlled” (Knights and Sturdy 1997, p. 179). This emphasizes both the specific implications of various forms of control in the selling process and the space of resistance that may develop to sales pitches that are not suited to the intended customer.

Service production is mainly characterized by the increased involvement of the “new” third party to the traditional employer-employee relationship that changes the theories and practice of control (Sturdy et al. 2001). In forestry, this third party is the customer (based on consumption), who is simultaneously the private forest supplier (in relation to ensuring raw material supply to the industry). The sales processes of forestry service organizations, such as forest management or logging, are thus not only motivated by selling the service but also by the control of raw material for industry. The two different identities allow the impact of various forms of subjectivity and increasingly affect the relations between the forest owner and the forestry organizations, and the content and value of the sales process. Due to the dominant position of these organizations, the relationships as well as the control over the process thereby disincentivize increased focus on the protection or conservation of forest, whilst highlighting the economic effects of forestry resulting from maximal production. Alternative focuses and markets are thus marginalized in relation to the hegemonic production-oriented logics (Mattila and Roos 2014; Andersson and Keskitalo 2018).

Thus, in the attempt to control the sales process, the control of the subjectivity of forest owners becomes an integral part. This need to accommodate the consumer whilst gaining a desired outcome (a sale or, here, both sale and access to resources) has been observed more widely in relation to sales processes. Given that customers are conceived of with regard to sales as a focus for their identity and self-imagination, “enchantment” is seen to have a functional role (Korczynski 2005; Ritzer 2010). To handle the contradictory relations of sales interactions, sales workers/timber purchasers may promote the enchantment of the myth of customer sovereignty through forms of consumption within the sales interaction; e.g. information, services, and advice. The acceptance of a sense of sovereignty provides an opportunity for the professional to influence the behaviour and decisions of customers (Korczynski 2005). This process is thereby both deferential and authoritative, by developing and practising routines to make it difficult for someone to decline to buy (Leidner 1993) but avoiding the customer being made to feel controlled in order to uphold the myth of customer sovereignty (Korczynski 2005). Schuster and Danes (1986) highlight the challenge of this customer experience, emphasizing that “while customers may want a sales-person to offer knowledgeable advice, they apparently do not want to be told what to do” (Schuster and Danes 1986, p. 24). This
means that “salespeople need to offer information and advice in a way which allows the customer to maintain control over making the decision” (Schuster and Danes 1986, p. 26). Assumptive closes “[allow] agents to limit the customers’ options without seeming to do so, to let prospects believe that they were making decisions while the agent remained in control of the interaction” (Leidner 1993, p. 204).

For encouraging consumption within the sales interaction, enchantment constitutes a central practice in the production of pleasurable dreams and fantasies (Bryman 1999). However, “enchantment cannot work with a passive audience” (Korczyński 2005, p. 81) – it requires the consumer’s participation. One way for consumers to resist is to avoid engagement and reject the opening of a sales interaction (Jobber and Lancaster 2012). Meanwhile, disclosing or masking the opening of a sales interaction, e.g. by making it hard to distinguish between the service and sales interaction, is one potential way of getting the consumer to participate willingly and thereby limit their resistance.

**Material and methods**

Sweden has a forestry sector that is strongly dominated by production-oriented rationales and logics (Andersson and Keskitalo 2018). This has contributed to it today being one of Europe’s largest forestry sectors in terms of area and contribution to GDP as well as export value (2.2%) (SFA 2014), and being the world’s third largest exporter of sawn goods and fourth largest exporter of pulp and paper (SFIF 2017). Although half the forest is owned by some 330,000 private individuals within small-scale or family forestry, the forest industry holds a strong position within the sector, in terms of forest ownership, advice, the raw material market, and services. The reduction in resources of the Swedish Forest Agency in recent decades (Appelstrand 2007; Lidskog and Sjödin 2015) has cemented the dominant and influential position of the forestry organizations, including forest companies, forest owners’ associations, timber purchasing organizations, etc., for example through advisory and commercial services and in the decision-making of forest owners (Follo 2011; Keskitalo and Liljenfeldt 2014; Lönstedt 2014; Andersson and Keskitalo 2018), as well as in service development (Mattila and Roos 2014). The main forestry organizations, including the forest owners’ associations and the large and midsize timber purchasing companies, make up the majority of the forest-related service market in Sweden supplying services (mainly through subcontracted entrepreneurs) to individual private forest owners, often through timber sales. Other players, such as smaller sawmills, forest management companies, and individual entrepreneurs, operate mainly on a local level and have smaller resources for development and for influencing the forest-related service market (Mattila and Roos 2014). The Swedish case is thus not typical of any broader transformation amongst forest owners (which have been argued to vary greatly across countries and perhaps do not even allow typical cases to be identified), but is instead rather a stand-out case with regard to the well institutionalized role of forestry in the country (Keskitalo 2017). This characteristic in particular, however, makes it a relevant case to understand the ways in which constructions of service practices are shifted and resisted, given both the strong and internally integrated forestry sector and its reliance on, amongst other things, small-scale forest owner products; i.e. the fact that it requires a continued construction of sales, consumption, and service practices to continue in its present form.

To examine the organizational understanding and strategies of forest-related service development and production, semi-structured interviews were conducted with all the main forestry organizations in Swedish forestry, in what constituted a full study of the major players in this sector. A total of 16 organizations were represented by 17 interviewees, covering all major categories in the sector: 1) large national and multi-national forest companies (LFC) that own forest resources and forest industries and buy timber from private, non-industrial forest owners to complement the timber supply from their own resources; 2) midsize forest industries (MFI) that rely mainly on procuring timber from private, non-industrial forest owners and have their own timber procurement organization; 3) forest owners’ associations (FOA), i.e. cooperative organizations owned by the forest owners themselves that sell their members’ timber to both self-owned and external forest industries; and 4) forest management organizations (FMO) without any industries of their own that provide total management of the forest property, including administrative services, to both private and public forest owners. Due to their limited organizational sizes and geographical cover, this last category had a smaller representation than the others.

All these organizations provide advisory or other services to individual private forest owners, and thereby have an influence on forest management and operations. The majority of the organizations combine the delivery of services with timber purchases. The organizations represented by the interviewees are evenly distributed over the whole of Sweden, but with less representation in southern Sweden due to its smaller area of forest cover. The participating interviewees had leading positions, and were responsible for strategic planning in relation to sales and marketing to forest owners within the organizations. The interviewees were selected by the organizations. For one organization, two interviews were conducted due to a divided responsibility between two persons. The interview guide covered broad themes of trends, strategies, and developments in marketing, customer-relations/management, and the organization of sales transactions based on their perceptions and understanding of the shifts in various aspects of the group of forest owners. The guide was developed to cover main themes in the theoretical framework, focusing on the conception of forest owners, services, the sale process, and organization. All interviews were conducted at the end of 2016 and the beginning of 2017, face-to-face, and in Swedish. The interviews, which lasted about 90 min each, were transcribed verbatim and deductively coded in accordance with the theoretical framework, with a focus on meaning-making and constituting articulations and practices. Additional themes were highlighted in a second round of inductive coding based on common themes. The results are presented based on three main themes: Forestry organizations’
perceptions and management of challenges related to the “new” forest owner, which examines the organizational and strategic understanding of the structural shifts in forest ownership; Service logics and business relations, which analyses the relation between services, logics, and the sale process through the three subthemes of relationships, knowledge, and services; and The service organization and challenges of redirection, which deals with the specific organizational challenges of Swedish forestry. All quotations presented here were analysed in Swedish and translated by the first author in the final stage, with the translation checked by the second author.

Results

Forestry organizations’ perceptions and management of challenges related to the “new” forest owner

All interviewees described, to varying extents, different shifts among forest owners in Sweden and agreed that these shifts had, to some degree, also affected their organizations and sales processes. In relation to how the interviewees perceived these shifting characteristics, the extent and depth of the implications varied between the different organizations. Connecting specific characteristics, some perceived them as “new” or “modern” forest owners, while others tried to play down the fundamental nature and implications of the changes. Central to many interviewees’ perceptions and understanding, the shift in forest ownership was mainly associated with urbanization and the spatio-temporal situation of forest owners (e.g. absentee ownership). Distance constitutes a key factor, according to the interviewees, in the shifting relations of forest owners – to both their properties and the organizations. Geographical distance, often categorized as having one’s property in one place while residing in another (often further away), contributes to the decrease in forest owners’ engagement with and experience of their property. However, a number of the interviewees underline that geographical distance does not always determine the level of engagement; other factors such as time or interest can also be contributing factors. One of the key factors emphasized by the interviewees was the economic aspect of forestry and the fact that forest owners, mainly in urban areas, are less dependent on income from the forest. In a number of ways this has major implications, according to the interviewees, on the behaviour of these groups of “new” forest owners. For instance, from a more strategic perspective, one of the interviewees describes that:

New forest owners seldom need their forest as a source of income in the same way as previous ones have. It means that you can use the forest to earn time. This is a typical communication that we play on. In the older groups of customers, it’s more about quality and economy. With the younger ones it might also be quality but perhaps in a different way, and also about the possibilities for other things. We can, for instance, help you to manage your forest to uphold an inheritance. It’s more about the emotional aspect. (LFC)

Motivation and the perception of value, e.g. within the sales interaction, is thus also seen as having shifted. In relation to services, one interviewee describes that:

It’s not that important to get the last krona in their wallets, because they don’t need it anyway. They have a good salary. (LFC)

At the same time, the other economic factor that is perceived as having implications on the behaviour of forest owners, and the structure of forest ownership, is the increasing value of forest properties. As one interviewee emphasizes, “a forest property has a different value than it had ten years ago” (FMO). Many of the interviewees witness how this factor has contributed to increased activity on the property market. From their perspectives, it has become more common for people to buy forest property, or expand their current property, as an investment – something that drives a new form of business-oriented forestry that is dependent on continuous revenue from their properties. One of the interviewees emphasize the dual behavioural effects of this economic shift:

It’s a tough situation if you’ve taken over, and even tougher if (you) may have had to buy out a brother or sister. Then you might have to harvest more heavily. Then the perception of the forest is shifting for those who own forest with a higher debt. In the last ten years, property prices have gone through the roof. There we can see that there are those who have to minimize the costs and focus on harvest incomes. At the same time, there are those who go in the total opposite direction and are not in need of any income from the forest at all. (FOA)

Another implication of this aspect, highlighted by a number of interviewees, is that increased property prices have contributed to a larger acceptance of putting the property on the market instead of leaving it as an inheritance from parents or relatives. This has opened up the possibility both for less motivated forest owners to sell and for those who are more interested to buy, as the number of properties on the market increases. One interviewee describes this:

It might be more that parents nowadays tend to accept that there’s no one who’s interested in taking over (the property) and that it might be better to sell (…) they don’t want to fob it on the children. They accept that it’s like this and that they’ll get access to money instead. It would be a different thing if the prices of the properties had been lower, but nowadays it quite quickly becomes quite a lot of money. (MF)

Another effect of the shifting spatio-temporal nature of forest ownership is that groups of forest owners, mainly in urban and metropolitan areas, have less direct relation to and experience of their property and forestry. All the interviewees emphasize that this situation has drastically decreased the general level of knowledge about forest ownership and forestry among these groups. Two interviewees describe the shift:

We see that (forest owners) who don’t live off their property have a greater need of knowledge. There are fewer who have a background in forestry and there are more of them who are forest owners from other perspectives. (…) This results in a greater need for advisory and forestry competence. (LFC)

The perception of the forest owner has been very traditional. It’s a 58-year-old man in … rubber boots with plenty of forestry knowledge. It’s not that this perception is false – it’s been very true – but now it’s starting to change, and we also need to change our selection of services. (FOA)

The urbanization and geographical distance also pose the risk, according to some interviewees, that some more interested and informed forest owners do not always possess “the right knowledge” and that this distance and competing
information make it harder for forestry organizations to control the social nature of forest ownership. One of the interviewees describes this as follows:

Then there are those who have knowledge – there are a lot of things to know, so sometimes it’s the wrong knowledge. It’s not everyone who knows that the timber gets thick and the prices drop if you let the forest stand. (MFI)

In relation to services, for example, the lack of experience in forestry also presents challenges to the forestry organizations since forest owners may have other, and sometimes “wrong”, expectations. Many interviewees highlight communication as a crucial tool for addressing the “correct” expectations of the customer, e.g. the distinction between traces and damages from forestry machines and what the results of final felling look like. Many of the interviewees also describe how the urbanization of forest ownership has contributed to a shift from a supplier identity towards a consumer identity, and behaviour that is more associated with the “urban lifestyle”. Digitalization and forest owners’ additional sources of knowledge and information also add to these characteristics. Interviewees stress how this gives rise to decreased loyalty and increased price comparison, with the forestry services and products treated more like other consumed services and products. The combination of these multiple factors – economic, identity, spatio-temporal, etc. – both changes and differentiates the behaviour of forest owners and opens up for the demand for new services and products to address these factors. An interviewee sums this up as follows:

There’s a difference between the forest owners who live in rural areas, those who have stayed, and those who have moved to the metropolitan areas. They demand different things. The ones who are city-forest owners, or what you would call them in the metropolitan areas, demand more advice, more services, and more clearly packaged services. They’re service consumers in another way than those in rural areas, who are more experienced in being self-active, and have a more traditional understanding of forest ownership. (FOA)

Service logics and business relations

The majority of the organizations have adopted the strategic aim of increasing the share of timber supplied by private forest owners. This is mainly based on the objective of increasing flexibility and control over the supply line and, in some cases, decreasing the pressure on the organization’s own forests:

The balance between the purchased (wood) and one’s own forest becomes more equal. The purchased (wood) will eventually bypass (that of) our own forest. That’s our goal. (…) It’s easier to control when the raw material comes from the forest (of forest owners), when it’s harvested and handled in the right way. (LFC)

The central suppliers have not increased their delivered volume at the same pace as the demand from the industry has increased. (…) All the timber purchasing organisations have increased their own purchasing (from forest owners) to handle this. (MFI)

The shifting characteristics of forest owners, the increased competition, and the demand from industry for timber and pulp have pushed many of the organizations to revise their old marketing and sales strategies to secure the supply and sales relations. According to some interviewees, a great deal of attention had previously been given to product development further down the production line/stream, e.g. at the sawmills. In recent years, however, the focus has shifted towards the forest and its relationships. Despite this increased commodification of services, the majority of the interviewees highlight the intimate relationship between timber sales and services:

To be frank, the goal of this business is to supply the industry (with timber). That’s our task. The reason why we have this whole package is connected to the fact that we experience that it strengthens our relations and we think we make better deals with those with whom we have recurring deals and dialog. (LFC)

Our primary goal is to buy timber, but to buy timber you have to offer all services. (MFI)

In our case it’s not about making money on services but to, in the end, get hold of the timber. (MFI)

With the primary focus on timber sales, many of the interviewees emphasize that there has to be a balance in the relationship and a clearer and more articulated value given to the forest owners. To buy timber, the forestry organizations “have to give something back to the private forest owners in term of service” (FMO). In many cases, service production is described as an integrated product that is consumed within the sales interaction – often to facilitate timber sale. Therefore, the consumption of services is often seen as a tool for controlling the sales interaction:

We have a lot of peripheral services that we create and build relations through. So it’s partly to be able to give as good as possible service to the forest owners – the other reason is we need to have control over our costs. (MFI)

However, the sense of relationship is dependent on the sense of the forest owner’s sovereignty. An overly one-sided focus on timber sales would risk transgressing the myth of consumer sovereignty and undermine the value of the sales interaction for the forest owner:

Since we’re timber purchasers, in most cases we want there to be a decision about a felling. However, we’re not so stupid that we don’t know that it affects our credibility in advisory. The landowners know this, so it’s a bit of give and take. (MFI)

In a similar way, the complex and contradictory relation of the sales interaction in these organizational settings also highlights the timber purchasers’ balance between institutional empathy and the capitalist motive. One of the interviewees stresses this balance:

You have to find the balance. You can’t be too much of an advisor, but you can’t be too conceited about your volume. (LFC)

With the increased competition and demand from industry, the significance of marketing has also increased. Within this, the organizations aim to find new ways to increase the value of their products. The dominant strategies for this have mainly been to increase the range of products and services, find and develop new markets (geographical expansion), and increase the productivity and quality of the organization (through rationalization). Previously, many of the organizations had focused primarily on the last strategy,
but also on the second one. However, the development based on these strategies, geographical expansion and rationalization, has been partly exhausted or shown signs of limited potential. This has led to a strategy of intensification and expansion, in terms of products and markets. The shift in strategy has given rise to the increasing contribution of services to overall production and turnover. Services have, to an increasing degree, become an integral part of the organizations and their “deals”:

We define the deal in three parts: the timber sale, the service sale, and the advisory. We believe that within ten years these three parts will make an equal contribution to the turnover – that’s our objective. (FOA)

Relationships

Many of the interviewees underline how the majority of their sales are based on relationships, and that the number of forest owners making contact for the first time is steadily decreasing. This is described both as an effect of the shifting characteristics/structure of forest ownership and as the result of an organizational shift in the nature and organization of the sales interaction. At least on the strategic and managerial level, the long-term focus on relationship management emphasizes that “the relations are more important than the separate deal”. The strategic focus on relationship management highlights the emphasis on long-term control and the nature of the sales interaction. Through the emphasis on “win-win”, trust, and reciprocity, the forestry organizations try to articulate the sales interaction in terms of a relationship, which masks the distinction between different forms of consumption and the sales interaction. This managerial and strategic alignment should be understood in relation to what the interviewees perceive as the increased focus of forest owners on being “good consumers”; e.g. by comparing processes and checking for the best deal. Through this, when it comes to forest-related consumption and products they behave and relate in a way that is similar to that of other, non-forest related consumers. An interviewee describes this shift as follows:

In society in general, customers are more flexible. We’ve been taught to browse the Internet, to find more information, and to challenge a bit more. We check [a price comparison site] if we’re going to buy a bicycle – who has the best offer. There’s this trend in society that we’re less loyal. (LFC)

This is seen by many of the interviewees as both problematic and a major challenge to their sales work, in which the long-term responsibility to the property and the timber market is emphasized. One of the ways to control the sales interaction is to limit the space for resistance by getting forest owners to fully engage, with the aim of ultimately closing the sale. “Enchanting” the relationship shifts the focus from the outcome of the sales interaction towards trust as a tool for managing long-term sales interactions. One of the interviewees expresses this as follows: “It’s not the deal but the trust. He should come to us of his own accord next time.” (FOA). Personalized offers and a sense of exclusivity – e.g. special deals, offers and discounts, invitations to events etc., being a “gold-customer”, or the offer “to own forest in their own way” – are also strategies used to limit resistance during relationship management. All these strategies mainly aim at limiting the space for resistance, e.g. by promoting other forms of consumption and avoiding one of the key aspects of the sales interaction: price. The relationship is emphasized as the primary criterion, while price is not treated as an aspect of competition.

In this respect, relations, including the consumption of services, are perceived as the key to a good deal and the closing of the sales interaction (at least for the time being):

Price is rarely a good means of competition since there can always be someone who can overbid you and the supply (to the industry) becomes less secure. (MFI)

It’s a journey, if we’re going to compete with others instead of just competing with money. It’s clear that money is a really strong means of competition, but it won’t be sustainable in the long run to just compete with money. We have to offer services. (LFC)

You can put a timber purchaser in an office, publish flashy ads in the paper saying you pay the best, and then wait for the phone to ring and the comparative binding (...). We stay away from that part of the market. We want to initiate the sale ourselves based on our customer relations. (MFI)

Relationship management is also seen as key in handling mistakes or misunderstandings in order to, e.g. avoid customer turnover. One interviewee stresses “having a good relation from the beginning so you’re able to solve it anyway” (FOA), while another one emphasizes the importance in relationships of “keeping what we promise and not promising things we can’t keep. (...) If we promise too much, we create expectations we can’t live up to” (LFC). As new groups of forest owners often lack any prior relations to forest organizations, this both opens up opportunities for new relationships because “they might not have decided whom to work with – if they haven’t inherited an opinion” (LFC), and calls for new strategies for establishing and sustaining relationships. One of these strategies that a number of interviewees have adopted entails, instead of targeting the individual forest owner, also including the family, for instance in planning activities and events. An interviewee explains that they are trying to:

Create meetings and activities where we can meet the whole family. If you’ve been with your family and met your family’s forest ranger multiple times, then it becomes more natural (to continue in forestry) when your father or mother passes away. (FOA)

Some of the interviewees emphasize that trust is dependent not only on the direct relations of the sales interaction, but also on the company’s brand, whether or not the organization owns forest themselves, their networks, and the size of the organization and its resources. Other factors that can support trust in the relationship are the quality of the product and the relations with and skills of the entrepreneurs. The individual relationship with the timber purchaser is only one of those on which relationship management is focused. All these other, interrelated relationships can be seen as the total relationship. However, some of these are harder to control or manage, especially those that go beyond the organization. As many of the interviewees emphasize, trust can also be supported through the consumption of services within the sales interaction. However, consumption, e.g. of information, needs to be controlled, in order to ensure both
correct content and that the forest owner forms the intended perception. This is preferably done within the sales interaction, either in the dialogue with the timber purchaser or through the technologies of government and marketing, such as forest management plans, personalized forest websites, or targeted marketing. As one of the interviewees describes the function and value of the forest management plan in the sales interaction:

We’ve become better at seeing where we make good deals and what it is that upholds relations (…) we’ve seen that where we have a forest management plan, we for instance have better relations and make better deals more often. (…) If we tie our suppliers to us through a forest management plan or through certification, then this strengthens us in our next dialogue about felling or fining. (LFC)

Relationship management, and the various strategies for limiting resistance within the sales interaction, are dependent on the participation of the forest owner. In relation to services, a number of interviewees explain that they are more than happy to sell full-management contracts, but that they prefer to have an active relationship with the forest owner. One interviewee explains how consumption and activity also support sales:

Generally, activities create frequency in the management (of the forest) too. We believe in management and in active decisions. We see quite quickly that more initiated forest owners are more interested and are initiating (management actions). The more frequency they have in their management, the easier it is to communicate with (them). (FMO)

Knowledge
All the interviewees describe how the decreasing forest-related knowledge and understanding, mainly in relation to industrial forestry and timber production, gives rise to new services and demands for information and education – often in the form of advice/consultations. The interviewees describe how advice/consultation has increased as a result of forest owners’ decreasing knowledge and know-how, and how the sales models of the organizations are shifting further towards increased implementation of relationship management. One of the interviewees highlights the function of advice in the sales interaction:

We need more and more to be advisors. (…) For us, the issue of advice has been highlighted more as a result of the fact that we make deals in another way than because any knowledge with the forest owner is lower. (MFI)

In a situation of declining forest-related/forestry knowledge, the value of forest expertise increases as the potential demand grows. Supported by the articulation of value by the forestry organization, this opens for an increased commodification of advice as a service – a formalization that transforms it into a product that can be sold and traded both within the sales relations and interactions as well as separately. However, this is dependent on the articulation of the use value of the product in relation to the “need” of the forest owner:

It requires that the owner has a need for our professional consultancy (…) and is prepared to pay for those services. (FMO)

We both have to dare and should charge for services as well as our role as forest experts. (MFI)

However, the general decrease in forest-related knowledge and understanding about forestry also creates risk in the sales interaction and relationship. Besides limiting the basis for communication, the interviewees mainly describe the risk, or “dangerous factor”, of forest owners having the “wrong expectations” regarding their relationships, services, or products. This complex relationship is emphasized by one of the interviewees as having to manage:

More and more demanding consumers at the same time as we have less and less knowledge about forestry – which is very knowledge-intense. (FMO)

For many of the interviewees, this comes down to trying to “secure expectations” and to “working with the understanding of that some measures cost money” (LFC). The two main strategies practised are increasing the consumption of information, both within and in relation to the sales interaction (e.g. through courses or educational events), and increasing the commodification of advice by articulating its value and defining it as a service.

The service organization and challenges of redirection
To summarize, the first part of the analysis shows that the main aims and logics of services developed and offered by the forestry organizations are to support the active management of forests, build relationships, and create value for the consumer/forest owner. All services are directly or indirectly focused on timber production. Those that are more indirect in their focus are mainly aimed at acknowledging and sustaining relationships by supplying personalized services that cater to the specialized interests or demands of specific groups of forest owners, e.g. forest management for hunting, growing mushrooms, or recreation/aesthetics. Besides an increased formalization and commodification of services, services are also strategically used as part of the consumption within the sales interaction to help promote the relationship, partly through the articulation of user value, and to conceal the opening of the sales interaction. All these shifts have organizational and managerial effects and consequences which are acknowledged, understood, and implemented in different ways.

With the shifting characteristics of forest ownership and increased emphasis on services, according to many of the interviewees there is a greater demand for full-service organizations that can provide a great variety of service to the forest owner, including e.g. full-management services/management contracts and various forms of legal and economic services. The focus on what one of the interviewees calls “one-stop shopping” encourages a growing range of services. In relation to new groups of forest owners, this can also entail adaptively communicating or repackaging “old services”. One of the interviewees discusses this as follows:

We need to address different groups (of forest owners) in different ways, but we still have the same offer as a basis (…) we talk about old services in a new way, package it in a new way. (…) Instead of talking about soil scarification, plants, regeneration control, planning – we talk about new forest. (FOA)
In order to provide and sell more services, the managerial strategies adopted are also focused on the formalization, and increased commodification, of services that had previously been personalized, e.g. by “informal management assignments” based on individual timber purchasers’ relationships. These services, for instance property oversight for distant forest owners, are formalized and integrated within different service packages as, e.g. “free support”. Part of this process also involves the targeting or personalization of service packages, often based on customer segments, to increase the attractiveness of the deal – which often, according to one interviewee, “puts pressure on (the timber purchaser) to personalize the services so they’re not overly standardized” (FOA). Services such as forest management plans, certifications, or longer contracts (often 3–5 years) also help to sustain relations and activity on the basis of the yearly revisions and structured plans.

The main service provided by the organizations can be separated into four different categories: 1) traditional forest management services, 2) valuing and inventory services, 3) planning and advisory services (including forest management plans and certification), and 4) legal and economic services. All the organizations offered variations of these services. A fifth category, comprised of a number of different categories, is service packages focused on supporting a change in the generations running the property. A great number of the organizations, to different extents, developed this type of service package to “ease” the transition between different generations in the process of inheritance. A number of the interviewees also underlined the function that this service played in establishing relationships with the upcoming new owners of the property – often the children of the current ones.

All the interviewees describe that this increased focus on services and relationship management pose various challenges to both forestry organizations and traditional forms of sales work. In many cases, this has increased the organizations’ complexity, which has required not only new external but also internal communication strategies. One of the interviewees emphasizes these challenges:

> It effects the organization greatly when there suddenly comes a new selection of services. They need to be understood, as well as the whole chain. (FOA)

These strategic changes have also partly shifted the skills and competences associated with sales work within some of these organizations. The shift in the characteristics of forest owners, combined with the greater focus on relationships, highlights the requirements for “other types of competences” than those which are purely forest-related. This includes a variety of social and relational skills, for instance the ability to identify “what this person wants and is expecting in order to make the right offer” (LFC). It also includes an increased ability to see and understand other perspectives on forests and forestry. One of the interviewees describes this challenge as follows:

> We in forestry are very much drilled in money, costs, results, and pace, while this type of forest owner doesn’t find the last krona important (…) – it’s a challenge for us to rethink this. (MFI)

In the formalization and commodification of various services, the need for specific competences is significant for ensuring the quality of the services and the sale. One of the interviewees argues that “in order to charge for something, we need more formal competences concerning the things we’re selling” – stressing one of the key organizational challenges involving service development in these organizations. This transition has highlighted how service is partly dependent on the organization’s characteristics (e.g. size and resources) – determining whether the organization needs to go beyond its traditions (competence, etc.) or to collaborate with other organizations in order to supplement its competence or the services it offers. For both strategic and other reasons, organizations have chosen various strategies for managing and adapting to these shifts and demands. Some have incorporated these competences, partly to maintain the control over and size of their organization: “We could become a sole timber purchaser with just a third of our organization” (MFI), while others have focused on networking and collaboration with other players. One interviewee stresses that: “We can’t keep that within our own house” (MFI), while another highlights their key reasons for going beyond their own organization:

> We’re not so big that we don’t have space to specialize (…); then its better that those specialities exist in other companies. (…) To provide full service, we need to be a considerably bigger organization. (MFI)

However, despite their more limited resources, one of the interviewees stresses that they may have a benefit in relation to larger organizations, e.g. due to their institutionalized nature: “We’re perceived (to be) more flexible than other (larger) actors” (MFI).

The shift towards the formalization of specific services also poses a potential challenge to the sales work of timber purchasers, as well as the organization, due to their close relationships and prearranged “deals” with forest owners. Within this process of managerial change to sales work, this potentially poses a conflict as “the brand of the timber purchaser is considerably bigger than (the organization)” (MFI) – as one of the interviewees puts it. In many organizations, the increased focus on services and relationship management highlights a need to change how sales work is organized and performed:

> Previously, we put in 95% before the contract was signed and a maximum of 5% after. (FOA)

The various technological developments, e.g. digital forest management plans or personalized forest webpages and apps, are emphasized as one of the key bases for sustaining and managing relationships, especially at a distance. This also includes certification, such as Forest Stewardship Certification (FSC), a voluntary market-based tool with wide adoption that supports long-term relationships through yearly revisions and updates. The various technologies have become increasingly integrated in sales work, partly because the timber purchaser in the sale “can always go back to the plan”. This is one of the main reasons that these technologies are seen as “a very good tool for buying (timber)”, which helps to enable “participation, albeit at a distance”. The web-based solutions decrease...
the need for the direct communication of information by “increasing the accessibility of information”. Supporting self-service, the forestry organizations are “not having to send out so much information, but the forest owner can instead go in and check” (LFC). During certain periods of the year, one of the interviewees underlines, the flow of timber to the industry is high. In these periods, services that do not directly produce timber can therefore also “slow down the machines” and both supply the entrepreneurs with work and produce value without producing timber.

Discussion

The results of this study show how service has increasingly become an integrated aspect of consumption in the sales interaction of forestry organizations, and has contributed to a shift in the organization of sales work. From a strategic and managerial perspective, services are gradually coming to be associated with the heightened focus on relationship management. The shifting characteristics of forest ownership, documented in a number of previous studies (e.g. Berlin et al. 2006; Ingemarson et al. 2006; Nordlund and Westin 2011; Haugen et al. 2016; Aguilar et al. 2017; Butler et al. 2017; Keskitalo 2017), constitute one of the vital drivers in this transition. Both distance and knowledge are emphasized as the main challenges, but the increasingly changing behaviour and heterogeneity of forest owners also contributes to reshaping the sales interaction and the integration of services. The heightened emphasis by the organizations on the decreasing knowledge among groups of forest owners provides opportunities for a number of services with the main focus on advisory services, but with the main aim of securing forest resources to industry. However, the interviewees’ emphasis on the “right” knowledge stresses both the constituting relations of knowledge, e.g. in sales and the commodification of services, and the specific logics and rationales of the forestry organization. While this says nothing about the actual knowledge of forest owners, it is highlighted as a central node in their meaning-making and the conception of the “new” forest owner – which structures the relations of not only sales and the service supply but also the potential co-creation of value (cf. Mattila et al. 2013; Häyrinen et al. 2015).

This strategic position and development can be regarded as processes of adaptation both to the changing needs of forest owners (market orientation) (cf. Hansen et al. 2006) and to the particular constructions of forest ownership and their potential “needs”, e.g. in relation to different segments of forest owners (Ficko et al. 2019). In the material, the creation and construction of needs is closely associated with the production and construction of (use) value, with the majority of the interviewees highlighting the increased commoditization, e.g. through more adapted communications (cf. Salmon et al. 2006), of more traditional services and the increased emphasis on their role as forest experts (cf. Mattila and Roos 2014; Lidskog and Sjödin 2015). Although decreased forest-related knowledge and levels of self-activity are documented (e.g. Lindroos et al. 2005; Ingemarson et al. 2006; Keskitalo and Liljenfeldt 2014), this emphasis, e.g. through marketing, can also be understood as a concrete way to construct both use value and groups/segments of forest owners in relation to one of the key resources of the forestry organizations: forestry knowledge. Through this, they can produce and shape not only the specific needs and subject positions but also the realities of Swedish forestry (cf. Knights and Sturdy 1997; Stanley et al. 2005).

Despite the increased focus on providing new services, e.g. various legal and economic ones, the study shows a service logic that is strongly timber-oriented (cf. Mattila and Roos 2014). The great majority of the services produced are directly or indirectly focused on timber production. Those that are more indirect in their focus are mainly aimed at relationship management or supporting and producing the business identity of the forest owner. As in previous studies (e.g. Andersson and Keskitalo 2018), this highlights both the strong logics and rationales behind the strategic and organizational challenges, barriers, and incentives when it comes to developing new service ideas that go beyond the dominating logics of timber production and sales. With this focus on service and relations, industry has become associated with commodity production while knowledge and education are linked to the production of services. This situation contributes to concealing the restructuring of industrial production and forestry, which has meant that activities previously defined as industrial, as a consequence of outsourcing, are today defined as service production (Isacson and Morell 2002; Ager 2014). The content and organization of service work involve an extension rather than an erosion of traditional production-oriented labour processes. The person-oriented sales processes – individual treatment and face-to-face relationships – require both an ability and a willingness to understand forest owners’ needs and to fulfil these needs (Ritzer and Stillman 2001).

Thus, the material illustrates an increased shift of operations towards services (cf. Oliva and Kallenberg 2003), while the increased integration of services into the sales interaction (timber) demonstrates the extension of production into services (cf. Warhurst and Thompson 1998; Lloyd and Payne 2003). As in previous studies, the results show an increase in diversity and all-inclusive full-service packages across all the organizations (cf. Mattila and Roos 2014). With the focus on both the control of the sales interaction and relationship management many of the organizations, especially the larger ones, emphasize the importance of providing the full-service package/“one-stop-shopping”, by either the organization itself or its networks and corporate partners (cf. Toppen et al. 2011). As number of the interviewees emphasize, this poses specific organizational challenges for smaller- and midsize service-providing businesses (cf. Hansen et al. 2002). Despite the potential for innovation, the organizational requirement and production of specific needs and services, highlighted in the material, could potentially reinforce both the power of dominant forestry organizations and the inequalities and segregation (cf. Follo 2011; Keskitalo and Liljenfeldt 2014; Häyrinen et al. 2015; Andersson and Lidenstav 2016) within the forest-related service market (cf. Mattila et al. 2013) that contribute to an exclusive tailoring of services to a specific type of forest owner (cf. Sturdy and Korczynski 2005).
The focus on relationship management makes it harder to distinguish between tangible and intangible dimensions/products (e.g. Levitt 1981) and aspects of service (e.g. environmental considerations) (Toivonen and Hansen 2003), as well as the separation between service and sales interactions, and highlights the challenges of the “joint value sphere” and co-creation within the forestry service relations (cf. Mattila et al. 2013; Mattila and Roos 2014; Matthies et al. 2016; Berghäll 2018). The drive towards relationship management and personalization has been emphasized by increased competition (cf. Hansen et al. 2006; Toppinen et al. 2014), but also by the opportunity to use the relationship to control the sales interaction, e.g. to enable the management of mistakes in the service production, to cut the costs of customer turnover and marketing (cf. DeSouza 1992; Fitchett and McDonagh 2001), to open up communication both ways (cf. Turban 2000), and to offer self-service (e.g. personalized forest websites and apps) (cf. Sturdy and Knights 1996). However, on the basis of relationship management, this mainly focuses on the sense of personalization (cf. Smith 1956) to limit costs and support the rhetoric of social relationships in organization-consumer interaction (Baudrillard 1998). In many of the cases in this study, this personalized approach could be categorized as systematized/standardized personalization based on the practice of market segmentation. However, in a time of increasing heterogeneity of forest ownership, segmentation could become problematic as it relies on a relatively high degree of homogeneity within the segments — which should be identifiable, measurable, actionable and substantial, as well as profitable, based on this specific business model (Kotler 1996). It potentially also clouds any deeper understanding of the reasons for similarities and differences among forest owners that could be crucial to both policy and service developments (cf. Butler et al. 2017).

The study provides examples of how various forms of consumption, of for instance advice/information and various services, is used to control the sales interaction and limit the space available for resistance — e.g. by concealing the opening of the sales interaction (cf. Korczynski 2005; Jobber and Lancaster 2012). The emphasis on activity and relationships also highlights the significance of not “working” with a passive audience”, by using “enchanted” and consumption to control the (customer) behaviour of forest owners (cf. Korczynski 2005). With regard to relationship management, the crucial organizational challenge and vital question is whether the forest owner, the customer, really wants a personalization of not 

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In relation to the dominant position of the organizations studied in the forest-related service market, the results thus offer important insight into the dominance of service logics and power relations in Swedish forestry. To understand the direct and practical implications of these types of logics for management and development, future studies may be expanded to reach both further players and comparative cases. By emphasizing the social relations and work of sales and service provision, this study also highlights the need for a critical perspective on sales and the implications of the theoretical and ontological shortcomings of the SDL framework to truly theorize the services as market offerings in a forestry context (cf. Mattila et al. 2013; Mattila and Roos 2014; Matthies et al. 2016; Berghäll 2018). The interviewed organizations constitute the main forestry organizations, based on their size and dominant position, but do not cover all aspects of the market for forest-related services, such as smaller entrepreneurial organizations (Lidskog and Sjödin 2014; Lodin et al. 2017; Andersson and Keskitalo 2018). It may therefore be particularly relevant to understand whether these service logics extend to other players as well, and also how these results compare with service changes in other countries, such as in the fairly structurally similar Finnish forestry. As Follo (2011, p. 391) poses, a central perception, in terms of both the sales work of the forestry organizations and forest governance in general, is that urban forest owners “may live happily with their forest without any forestry activity: It is not the forest that they move away from, but forestry”. However, as we have seen in this paper, forestry has an interest in sticking with the established categories.


