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POLICY BRIEF

FACING GOLIATH:

Challenging the Impacts of Supermarket Consolidation on our Local Economies, Communities, and Food Security

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As mega-stores such as Wal-Mart have expanded into food retail, making Safeway and Albertsons seem like local groceries by comparison, the impact of consolidation on producers and consumers alike has raised new questions.

In the 1920s and '30s, a robust citizen movement to protect local economies from the impacts of chain stores swept across the nation. One ardent spokesperson, writing in a 1929 issue of *Harper's* magazine, argued that "chain stores represent a sort of absentee landlordism. On our Main Street, and on thousands of other Main Streets, there is a situation where policies are dictated and standards are set by men who have possibly never seen our town."[1] Despite strong and widespread opposition, these early chain stores won out over the proposed regulations and statutes that sought local authority over corporate behavior.[2] Since that time, the rise of chain stores has rapidly continued, with big box stores dotting the landscape as successful independent businesses disappear. Today, identical stores offer identical selections from Portland, Maine to Portland, Oregon, and with this new level of homogenization, concerns about local economic and community health have been renewed.

However, issues of control and access to food have generated little attention in the chain store debate, even though food, as a basic human need, warrants special consideration. Supermarkets have long represented the face of consolidated food retail and are considered a core aspect of the retail landscape. As mega-stores such as Wal-Mart have expanded into food retail, making Safeway and Albertsons seem like local groceries by comparison, the impact of consolidation on producers and consumers alike has raised new questions.

This Policy Brief will address critical issues pertaining to consolidation in food retail, investigating structural changes that are occurring along the supply chain and uncovering the broader socio-economic impacts of consolidation on the community. Several strategies for building strong, sustainable food economies and communities are highlighted.

FOOD RETAIL GAINS THE UPPER HAND

In recent years, the scaling up and consolidation of production, processing, and retailing firms have characterized the food economy. Once, the food system was largely regional, and to some degree, national. However, most people now participate in a truly global food economy. This system is dominated by a handful of highly integrated companies and relies on industrialized production and centralized distribution networks.

Leading U.S. firms such as Cargill and Archer Daniels Midland, who have traditionally dominated commodity trading and processing, continue to wield considerable influence over the entire food supply chain. Yet today, the balance of power in the food system is shifting from commodity giants and food manufacturers to the largest retailers, impacting both suppliers at one end and consumers at the other.

Rapid market consolidation has occurred in the hands of retailers like Wal-Mart and Kroger, which trump the leading manufacturers in terms of assets and revenues. For many decades, the top five food retail firms in the U.S. controlled less than 20 percent of the market. The recent growth of Wal-Mart has sparked a series of big mergers, starting with the purchase of American Foods by Albertsons in 1998, at that point the largest food retail merger in history. From 1997 to 2000, the top five firms increased their market share from 24 to 42 percent of all retail sales.[3] By 2003, they controlled over half of all grocery sales.[4] These companies – Wal-Mart, Kroger, Costco, Supervalu/Albertsons, and Safeway – have gained unprecedented market power.

Safeway Trucks. *Credit: John Page, ISEC*

The consolidation of the grocery sector has reached such a pitch that it has raised fears about monopoly conditions. As a rule of thumb, for a market to be considered competitive, the top four firms in any given sector must maintain less than a 40 percent market share. The food retail sector has clearly outstripped this benchmark. In 1999, the Federal Trade Commission (FTC) took steps to limit further consolidation. At that time, Albertsons was required to divest 144 stores in California, Arizona, and New Mexico after their acquisition of American Stores, and the FTC undertook several other actions involving supermarket mergers to help maintain adequate competition. Yet, since the turn of the millennium, consolidation has continued with minimal intervention. For example, Wal-Mart has grown so powerful that it is able to dictate prices and terms to its suppliers who, with no alternative, have little choice but to comply.[5]

Wal-Mart has been the single greatest catalyst of change in the grocery industry in recent years. It grew from selling no groceries in 1987 to becoming the leading food retailer shortly after 2000, now outselling second-in-line Kroger by almost a two-to-one margin in groceries alone. By some projections, Wal-Mart stands to control 35 percent of the nation's grocery market in as little as four years.[6] Wal-Mart has become notorious for its poor labor relations, stranglehold on suppliers around the world, and funneling tax dollars away from local communities.[7] The company has aggressively pursued a business structure and philosophy that undermines labor, local economies, and the interests of producers and suppliers. While Wal-Mart has undoubtedly pushed the boundaries of acceptable business practice, to some degree it is simply the most successful player in an economic system that has evolved to favor large, integrated companies over smaller-scale, independent businesses.

Food Retail Consolidation Causes Unjust Food Distribution

"Merger madness" is occurring throughout the food supply chain. At each link in the chain, from production to retail, firms are under great pressure to buy out or be bought out by their competitors. Many analysts agree that consolidation of food retail will become the single greatest driver of change in the food system.[8] Not only are food distribution and marketing affected, but the way Americans farm is being fundamentally altered. In a scramble for bargaining power, as described below, all links in the supply chain, including distribution, manufacturing, and production, are being forced to scale up.

Distribution

Consolidation in the food retail sector has led to a shift in the mechanics of food distribution. As the top retail firms have become larger, increasing their geographic reach and number of outlets, they have moved to centralize and streamline their purchasing systems. These companies have, to a large degree, integrated distribution functions into their operations, taking advantage of economies of scale to increase both profits and their ability to control the distribution of food to their stores. The importance of traditional wholesale markets, where retailers traditionally purchased their supplies, has dwindled.

Today, the majority of major food retailers are self-distributors, managing their own fleets of trucks, warehouses, and buying offices. For example, Kroger has roughly 30 distribution centers to serve its 2,500 supermarkets and other leading chains do the same to fully integrate their supply chains as a key strategy for remaining profitable. The internalization of this function by retailers and the associated decline of traditional markets have essentially privatized data on food transport, obscuring analysis of food miles and distribution patterns.

Processing and Food Manufacturing

In response to the growing power of food retailers, food processors and manufacturers are also being driven to step up their consolidation in a grab for bargaining power. Small and mid-scale processors continue to be swallowed up and a small number of giant firms now dominate. The leading 20 food manufacturers produce more than half of the nation's processed food, twice the level of the 1950s.[9] Among the 26,000 food manufacturers that remain in the U.S., the top 100 account for three quarters of all processed food sales nationwide.[10]

Despite continued consolidation among manufacturers, the leading retailers remain on top. One result has been an increase in arrangements in which suppliers pay additional fees or perform special services to retain their relationship with the retailer. These obligations include practices such as slotting fees (where suppliers pay retailers for the privilege of stocking their products on the shelves), retroactive discounts, exclusive rights, promotional expenses, and display fees. It has been estimated that such retailer fees furnish roughly 50-75 percent of the total net profit of large supermarkets.[11] Small, independent processors are often marginalized when they are unable to shoulder these added costs.

Consolidation in food retail has accelerated a flurry of mergers and acquisitions in the food manufacturing industry. In terms of the balance of power, two important trends stand out: the top retailers have firmly established themselves as the power brokers in the supply chain, and small and mid-sized firms at each level, including processors and manufacturers, distributors, and retailers are being forced out, leaving a few giants in control of the U.S. food supply. The trend to "get big or get out" has pushed food sales into new realms of competition that threaten food security, health, and economic wellbeing.

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Production

The consolidation domino effect sparked by the food retail sector has extended all the way to food production. With just a few retailers now selling the majority of food in the U.S., farmers, ranchers, and fishermen have no comparative bargaining power with respect to large manufacturers and retailers. Purchasers of raw farm products increasingly demand large quantities of each item and it is more cost-effective for their purchasing departments to meet regional or nationwide demand through one large producer than by sourcing from small, local producers across the country. Consolidation is forcing a shift toward large-scale, monocultural production, which typically demands increased mechanization and chemical inputs.

Each year, scores of small and medium farms, unable to scale up to meet buyers' needs, are forced out of business. Others turn to contractual arrangements with suppliers to ensure a market for their crops. The *LA Times* reported that "some growers said they felt they had no choice but to turn to this type of contract production, unable to compete with the clout and marketing muscle of their larger competitors."[12] As a result, these farmers are bound to the typically unfavorable terms of exclusive contracts with large food manufacturers.

Large food retail chains, the industrialization of agriculture, and the centralization of food processing and distribution are all connected.[13] Understanding these supply chain dynamics is an important precursor to addressing the many economic, social, and environmental problems in today's food system.

Consolidation Fueled by Hidden Subsidies

Many argue that a continuous scaling up of corporate activity is part of a natural evolution. However, this perspective often ignores the degree to which structural supports such as direct subsidies and economic policy favor and facilitate large-scale businesses over small, local enterprises. The highly consolidated food economy we see today is only possible because of policies that systemically favor the largest players in the game.[14] Corporate lobbyists with access to decision-making arenas such as the World Trade Organization work hard to ensure that policies, regulations, and subsidies will favor big businesses. International trade treaties are written to benefit large, transnational agribusinesses and disadvantage the small farmers that constitute the vast majority of the world's producers. The same imbalances hold true for food processors. Regulations developed to set health, safety, and environmental standards for large, industrial operations are applied across the board, resulting in mandated upgrades that small businesses cannot afford. One arena where this has been of particular concern is Codex Alimentarius, a set of international food standards that are being proposed to harmonize food safety regulations globally. Codex has been criticized as serving the trade needs of multinational corporations at the expense of public health concerns, influencing public policy governed by the Federal Drug Administration and others.[15]

> ***"Since 1984, the real price of a market basket of food has increased by 2.8 percent, while the farm value of that food has fallen by 35.7 percent."***
>
> *Economist Robert Taylor, testifying before the U.S. Senate Agriculture Committee*

Beyond economic policy and regulations, public support for big retailers can be much more immediate. Direct and indirect financial subsidies to the largest companies create unfair advantages. A 2004 study by Good Jobs First documented more than $1 billion in local and state government financing supporting Wal-Mart's U.S. expansion alone, with significant additional public funding unreported. The average Wal-Mart subsidy deal was worth $7.4 million. One deal to set up a distribution center in Illinois provided almost $49 million in public funding. These subsidies come in the form of discounted land prices, the development of infrastructure such as roads and utilities, development and property tax breaks, corporate income tax credits, sales tax rebates, low-interest financing, job training and worker recruitment grants, and economic development grants.[16]

Unraveling the Fabric of American Life

In the post-9/11 era, flag- and slogan-covered shopping bags tell us that being a good American citizen means "shopping until you drop." While the conflation of "good citizen" and "big consumer" is troubling in and of itself, it is also worth considering what kind of economy we are supporting when we spend our consumer dollars. The impacts of consolidation have had ramifications far beyond the supply chain. Local economies, labor, and food security are all deeply affected by the scaling up of food retail.

Undermining the Local Economy

The shift in a community away from local businesses to national or multinational chains has profound effects on the local economy. Large chains have a more difficult time sourcing local food than independent retailers because they deal in huge quantities and their distribution chains are highly centralized. A national retail chain with hundreds of stores across the country will stock their outlets with products from the same suppliers. Conversely, a local retailer generally has more opportunity to source locally, leading to multiplier effects that benefit the regional economy by generating downstream economic benefits.

There are positive economic effects of purchasing from locally owned and operated retail outlets. A study of several industries in the Maine economy revealed that purchasing from locally owned businesses kept three times as much money circulating in the local economy than purchasing from chain stores.[17] For every dollar spent at a chain, 14 cents were then spent by that chain in the state's economy. For every dollar spent at a local business, 53 cents were put back into Maine businesses. Local businesses were more likely to do their banking, accounting, marketing, and other business activities with local companies. In addition to a greater likelihood of purchasing goods and services from other local businesses, local stores provided higher wages and better benefits to local employees and a greater percentage of taxes to local government to improve local services. Furthermore, profits generated for local owners were more likely to be spent in the local economy than earnings by large chain stores. The organization Civic Economics similarly found that in one neighborhood of Chicago, $100 of spending at a locally owned bookstore generated $68 of local economic activity, compared with $43 for a chain bookstore.[18] Studies such as these are indicative of the "leaky bucket" effect: money spent at stores that are not owned locally leaks out of the local economy.[19]

Weakening Labor Standards

The economic impacts of the consolidated food system extend to include an erosion of labor rights throughout the food economy. When the business landscape in a community shifts from diversity of downtown shops to megastores, fewer people own their own businesses. Local canneries, distributors, bakers, butchers, dairies, produce shops, and groceries close. Jobs are drained from the community. In England, an industry study concluded that for every new chain supermarket in a community, a net average loss of 276 jobs resulted due to closure of other food-related businesses.[20]

As food retail continues to shift from local ownership to chain stores, business owners that have connections to the community are replaced with distant decision-makers. The economic bottom line is no longer balanced by human connection and care for the community. More workers are employed part-time and receive few, if any, benefits. In 2003, fierce competition among leading supermarkets in Southern California led to significant cutbacks in worker benefits that resulted in over 70,000 workers walking off the job, demanding justice. The supermarkets countered that they could not meet worker demands because of the need to compete with Wal-Mart, which was poised to enter the grocery industry in full force in California. The regeneration of local food economies will facilitate meaningful jobs, where workers – from farmers to processors to check-out clerks – enjoy a sense of fulfillment and connection in their work, as well as being more fairly paid.


A closed Albertsons supermarket in Fruitvale, Oakland

Eroding Access to Food in U.S. Communities

Roughly 12 percent of all U.S. households are considered food insecure, lacking access to sufficient food to meet their basic needs. In one third of these homes, food security is so poor that these families have been classified as hungry.[21] Supermarket chains whose owners, managers, and shareholders are not connected to the local community are notorious for closing stores in low-income communities, relocating them closer to the suburbs. The prevalence of this practice, dubbed "redlining," has created a country dotted with food deserts: low income communities with very limited access to healthy, affordable food. Redlining is driven in large part by the priority for profits among the largest chains that leads to the closure of stores with lower profit margins.[22] Locally owned and operated grocery stores, in contrast, tend to better balance profits with the needs of the communities they serve.

In addition to practices such as redlining, food retail consolidation has exacerbated food insecurity and hunger by contributing to rising poverty levels. As noted earlier, the entrance of chain stores results in a net loss of jobs in the community. Wages are lower leading to higher rates of household underemployment and poverty. A *Social Science Quarterly* study on the effects of Wal-Mart actually found that the entry of new Wal-Mart stores in U.S. counties directly *increased* county-wide family poverty levels.[23] This phenomenon underscores the fact that even when supermarket chains are able to offer lower prices, the economic benefits to the community can be offset by broader detrimental consequences to the local economy.

Finally, the big retailers' promises of lower food prices for the consumer have not always materialized. Analyses of food price trends over time offers contradictory results. Contrary to popular belief, big box stores do not always bring a decline in consumer food prices. While leading retailers get their merchandise at lower prices they typically do not pass those cost savings on to the shopper. The economist Robert Taylor testified in 1999 before the U.S. Senate Agriculture Committee that "since 1984, the real price of a market basket of food has increased by 2.8 percent, while the farm value of that food has fallen by 35.7 percent."[24] Agricultural economist Azzeddine Azzam found that increased concentration in food processing has actually resulted in food prices increasing in 24 sectors and decreasing in just four.[25] If consolidation is allowed to continue further, food prices are likely to increase in the long-term because competition among top retailers will decrease.

Redefining the Retail Revolution for Community Health

The way our food is produced, processed, and sold has never been more hidden from the average citizen. The scale and complexity of the supply chain creates disconnection and fragmentation that must be redressed by radically different approaches to feeding the population. How should advocates of healthy food systems move forward? A few possible starting points are listed below.

Reframe the Issues

In order to address key problems in the food system, from hunger and increasing food insecurity to the farm crisis, we need to first examine our food economy. Doing so can offer new strategies for change that tackle common root causes. For example, establishing effective regional distribution and retail models would keep producers on the land, reduce food miles and carbon emissions, ***and*** ensure balanced access to healthy food within a community.

Create Truly Diverse Market Options

Healthy, sustainable food systems that serve the needs of local communities across the U.S. depend on strong local and regional links. As the concept of "local food" becomes more popular, retail chains and other businesses are likely to get on board with the local food concept. On the surface, the more entities that can provide some local products, the better. But in many cases, big chains selling local food may not represent meaningful efforts to localize the food economy, nor to create real systemic change. Safeway, for example, launched "Safeway Local" stores, which posture as neighborhood groceries; others advertise produce fresh from local farms as a core value. Typically, these stores offer a tiny number of local products, with the vast majority of their offerings still sourced from far away. Economies of scale make it difficult for large chains to decentralize their purchasing to a significant degree. Locally-owned independent stores and even small regional chains are more able to source locally and offer the added benefits of keeping more money circulating in the local economy.

Models of retail stores that support the local economy are plentiful and diverse. In the U.S., some examples include the farmer-owned and -managed Centerville Market in Lincoln, Nebraska and the Root Cellar in Columbia, Missouri, stores that only market food grown and raised locally; and the New Seasons Markets in Portland, Oregon, a successful grocery store committed to supporting the regional food economy while offering affordable and healthy foods.[26] Grocery stores like these help to create strong local identity and support local producers and processors. Covered markets, farmers markets, and specialty shops offer additional retail opportunities. In most of Europe and many other parts of the world, daily covered markets abound, offering shoppers one-stop convenience, and producers and retailers market outlets. With public funding and supportive policies, these models could gain a strong foothold in the U.S. This support could include a range of initiatives such as local procurement incentives, permissive zoning laws for public markets, transportation and parking policies that facilitate downtown shopping, and increased small business start-up funding. Many smaller traditional grocery stores are finding a niche for themselves in communities across the country. Advocates of healthy food systems have available a range of highly innovative and effective models for supply chain and retail alternatives, with new models and ideas being developed continually.

Foster Access to Healthy Foods *and* Strong Local Economies in Low-Income Communities

Food access in low-income communities, in particular issues pertaining to supermarket redlining and food deserts, must be addressed. Some food security projects in low-income communities specifically promote bringing in leading supermarket chains on the grounds that they offer better prices and convenience to local residents. Clearly, getting food to food deserts is a top priority and any step toward this goal is progressive. Yet, we need to keep in mind the goal of longer-term food security and local economic health. A systemic approach to food security would not only look at establishing retail outlets, but at improving the overall economic climate in such communities

Fresh produce at the House of Produce, a local grocery store in the Laurel District, Oakland

by advocating retail models that are locally owned and operated, and source from regional producers and processors. There are many examples of local grocery stores that offer prices comparable to leading chains, and that also hold in their mission statement the goal of building the regional food economy. Creating incentives for local, independent food retailers, thereby securing better community access to direct-marketed food, will have significant multiplier effects for the local economy and will serve to rejuvenate the community more broadly.

Level the Playing Field

Building sustainable food systems is needed to address the significant power imbalances that consistently favor large retailers and the consolidated supply chain at the expense of smaller local competitors. Local policy initiatives can be successful in creating local ordinances that restrict the size or market share of retailers, local food policies that build consumer access to local foods, and initiatives that garner full accountability for public funding. Local governments are often misguided in the belief that working with supermarket chains to redirect public infrastructure away from vibrant town centers toward chain stores on the edge of towns is good for the community. The Good Jobs First study of Wal-Mart subsidies proposes additional steps to level the playing field, including limiting public assistance to retailers to areas with demonstrated food shortages, eliminating subsidies to retailers that have abandoned other retail sites in the area, only subsidizing retailers that offer living wages to their workers, and requiring disclosure of the costs and benefits of subsidies.[27] These kinds of initiatives must be coupled with new, innovative policy solutions to shift public supports away from the biggest retail chains and toward local businesses.

Build Awareness and Involvement

Reclaiming our roles as citizens – not mere consumers – is important for building community support. Public education is an essential part of any effort to mobilize communities to shift the food economy toward the local. Several organizations offer research and materials to guide such efforts, including the International Society for Ecology and Culture (www.isec.org.uk), the New Economics Foundation (www.neweconomics.org), and the Business Alliance for Local Living Economies (www.livingeconomies.org). The Institute for Local Self-Reliance (www.ilsr.org) has published a Big Box Toolkit that contains information on shifting community economics away from big box stores toward revitalized downtowns and community markets. People can work with their local authorities, chambers of commerce, community groups, and others to spread the word and offer meaningful solutions.

Mr. Kim of the House of Produce, Laurel District, Oakland

Building a Better Future

Given the rate at which food retail consolidation is happening, as well as its considerable implications for economic and social justice, an understanding of food system dynamics through the lens of food retail is critical. To support sustainable food systems, an understanding of the direct and indirect public supports that favor the top retailers and alternative retail and supply chain initiatives that lead to systemic change are also urgently needed.

The food system remains a highly dynamic and evolving sector of the economy. There is great potential for influencing the direction of change and pinpointing leverage points in the system that will lead to transformation. The identity of the United States economy is still largely predicated on successful small business, innovation, and hard work, values that are encapsulated in the American Dream. These principles are threatened by the extreme concentration of power and market share in the hands of a select few. A healthy future for communities across the country depends on strong local food economies that are diverse, equitable, and sustainable.

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