

LEVELING THE FIELD – ISSUE BRIEF #3

Power Buyers, Power Sellers:

How Supermarkets Impact Farmers, Workers and Consumers— and How We Can Build a Fairer Food System

The next time you visit the supermarket, glance down the aisle and ask yourself a question. How much choice do I have when it comes to deciding what food I buy? At first glance, it probably seems like you have quite a bit of choice. Hundreds of different products line the shelves; in some cases, you may be able to find ten or more brands of the same product. With immigrant communities growing in both urban and rural areas, it is now possible to find a variety of “international” foods alongside the traditional ones in many supermarkets. Some stores now carry organic, natural, or other specialty products as well.

But first impressions are often misleading. Try, for example, to find locally grown food in the supermarket. It will probably feel like looking for a needle in a haystack. It may be challenging, if not impossible, to find such products as grass-fed beef, meat raised in compliance with animal welfare standards, or processed food not made with genetically modified corn or soybeans. What about food from companies that pay producers and workers—both abroad and at home—a fair wage?

A look at the marquee looming above the supermarket further complicates our notion of “choice.” Today, if you glance at that sign, chances are you’ll see one of only a few names. Nearly fifty percent of U.S. retail food sales are controlled by five firms: Kroger’s (which also owns Fred Meyer and other stores); Albertson’s (which controls Shaw’s, Star Market, Acme, American Stores, and others); Safeway; Ahold USA (a subsidiary of a Dutch company and owner of Stop and Shop, Giant, the on-line grocery service Pea Pod, and others); and Wal-Mart (owner of Sam’s Club in the U.S. and supermarket giants ASDA in the UK and Mycal in Japan, among many others). If you live in a metropolitan area, the chance that your supermarket is owned by one of these five firms increases to over 70%.¹ Even abroad, a tiny number of supermarkets dominate the world market. Wal-Mart alone controls 46 supermarket chains in 14 countries, with combined sales of over \$344 billion in 2006.²

Albert Foer, the president of the American Anti-Trust Institute, refers to these mega-retailers as “Janus-like figures... [that] must be observed from two directions simultaneously: as sellers (from a local perspective) and as buyers (from a national [or international] perspective).”³ Precisely because of their dual roles as buyers and sellers, large, powerful retailers raise concerns for the people who supply food—farmers, ranchers, workers, and processors—as well as for those who consume it.⁴ And as an economic actor in the community, the decisions your supermarket makes regarding wages, benefits, working conditions, and purchasing practices will have an impact far beyond its walls, stretching out into your family’s wallet, your community, and beyond.

This issue brief is one in a series that explores **concentration**—the dominance of an ever smaller number of large, powerful companies—in our food system. As we’ll see below, concentration is a defining trend in the retail food industry today. Fortunately, there are many creative ways that communities, individuals, and organizations can take action to make the system more healthy and more fair for all of us—and this brief will show you how to join them.

Supermarkets as Buyers

The number of companies involved in the food retail business is shrinking fast. Gone are the days when mom-and-pop stores peppered bustling downtowns; in 2005, the five retailers mentioned above controlled 48% of all U.S. retail food sales. That's twice the share they controlled just 8 years earlier.⁵ Wal-Mart's international sales increased by 30% in 2006 alone.⁶

What does this trend mean for the people and businesses that supply supermarkets with food? As the retail giants become larger, they gain what is called **market power**: the ability to manipulate the price or quantity of the goods they sell by virtue of the fact that they are one of only a few players in the market. This power allows supermarkets to dictate the terms under which they will purchase products, giving preference to certain kinds of suppliers.

For example, supermarkets may give discounts to suppliers that can provide the largest quantity of goods, discriminating against smaller suppliers. They may also force suppliers to pay a fee—called a **slotting allowance**—as a condition of introducing a new product into the store. According to a 2003 Federal Trade Commission report, the slotting allowances paid by U.S. suppliers range from \$2,000 to almost \$28,000 per product, depending on the retailer and the area where the store is located.⁷

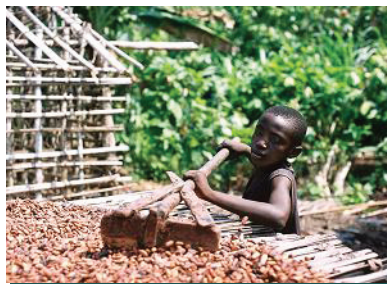
These kinds of arrangements make it hard for small suppliers to secure a space on supermarket shelves, since many cannot afford slotting allowances or provide the volume of product requested by the supermarket. As a consequence, consumers' access to products from smaller suppliers is limited.⁸ That helps explain why it's so hard to find local food in the supermarket!

It's not just suppliers who are affected when supermarkets flex their buying muscle. Further down the supply chain, farmers, ranchers and their workers feel the squeeze as well. When powerful grocery stores pressure suppliers to provide large quantities of food at a low price, suppliers in turn lower the price they pay farmers and ranchers for what they've produced.

Farmers and ranchers buy their inputs from powerful seed, fertilizer, genetics, or equipment companies that are just as concentrated as the companies to

which farmers sell their products. The result is that farmers, ranchers and farm workers are squeezed between input firms charging higher prices and processors and distributors paying lower prices. Farm income has declined as a result.⁹

Unfortunately, one of the only costs that a producer can influence at all is the price of labor—and farm workers have suffered as prices have fallen lower and lower. Their wages may drop, hours rise, or housing and other amenities be eliminated. Basic labor standards are violated at home and abroad through the hiring of child workers or undocumented laborers with no power to hold producers accountable when their rights are violated.



A child worker sorts cocoa beans in Cote D'Ivoire.

Photo courtesy ILRF

A good way to measure the effect of retail power on farmers and farm workers is to look at the portion of each dollar spent on food at the supermarket—often referred to as the **retail food dollar**—that goes back to the farm. Over the last few decades, the farm share of the retail food dollar has declined steadily, at points dropping so low that producers were forced out of business in droves. In 1998, only \$0.12 out of every dollar spent on pork in the grocery store went back to hog producers—75% less than what they received in 1970. While farmers saw their profits from hog sales drop into the red, consumers didn't benefit from the low farm prices at all: retail pork prices stayed stable.¹⁰

Hog producers' share of the retail food dollar has recovered somewhat since then, but is still below pre-1998 levels.¹¹ And the phenomenon is not limited to pork; virtually all food producers in the United States have seen their share of the retail food dollar decline recently.¹²

Supermarkets as Sellers

There is a common belief among consumers that large supermarkets like Wal-Mart are a net benefit: they use their market power to drive down prices. But in study after study, economists have found that retail concentration tends to lead to higher prices, not lower.¹³ Because of the power they exert over the market, giant retailers have no incentive to pass on savings to consumers, even as they squeeze farmers and wholesale suppliers by offering them lower and lower prices for their products.¹⁴

As the number of supermarkets selling to consumers is reduced, we'll see other negative effects. The quality of service we receive may decline when companies are not forced to compete with each other for customers.¹⁵ If only a few supermarkets dominate, there may be less

willingness or flexibility to change their practices or expand their offerings in response to consumer pressure.¹⁶

In a recent report by the non-partisan Farm Foundation, the authors find that "continued concentration of large-scale processing, food distribution and retailing [outlets] may reduce consumer choice in markets. Large retailers will offer a variety of foods... [but] their market power presents the potential to restrict consumer choices and increase prices."¹⁷

How is it that supermarkets offer variety and at the same time restrict consumers' choice? This concept is a bit confusing. But with a little research into brand ownership, we can make sense of this paradox.

"CHOICE" IN THE DAIRY CASE



In the organic dairy case at Wal-Mart, Dean products figure prominently.

Photo courtesy Cornucopia Institute

Glance at the dairy section of a supermarket. It seems like we have a lot of options for fluid milk, doesn't it? With closer examination, we'll see that the opposite is actually true. Dean, the largest U.S. dairy company, controls not just its own name brand but also such milk brands as AltaDena, Berkeley Farms, Borden, Garelick, Land O' Lakes, Lehigh Valley, Mayfield, Oak Farms, Shenandoah's Pride, Verifine, Horizon Organic, Organic Cow of Vermont, Silk soymilk, and many others. Our access to a variety of dairy (or soy) products at a reasonable price is entirely dependent on the decisions of one company. That doesn't seem like much choice at all!

Supermarkets as Economic Actors

One of the most important ways that supermarkets impact consumers, producers, and local economies is through their purchasing, labor, and wage practices. In recent years, community campaigns against the so-called "big box" retailers such as Target and Wal-Mart have focused on these aspects of the retail problem.

Studies show that overall economic benefits to the community are reduced when a local retail market is dominated by big supermarkets rather than by smaller, locally-owned businesses. The global nature of our food system means that

when supermarkets do not support fair, humane purchasing and labor standards, communities around the world—not just the communities where supermarkets are housed—are affected. Let's take a look at some of the most important ways that big supermarkets impact our economies and lives.

Big supermarkets spend less in the local economy.

In 2003, the Institute for Local Self-Reliance in Minnesota partnered with a local organization in Maine to conduct an economic analysis of Maine-owned businesses' spending practices and compare them to the practices of big box stores in the state.

They found that locally owned businesses spent \$0.53 of every dollar of revenue they earned within the state of Maine. These retailers tended to source more of their inputs and products locally, so they supported not only their own workers, but also other locally-owned businesses.

In contrast, the big box retailers spent a mere \$0.14 out of every dollar of revenue within the state. The big box stores tended to source inputs and products from suppliers outside the state—and often outside the country. Profits accrued to the companies, which were not headquartered in Maine.¹⁸

Pressure for profits drives down wages and labor standards at home. State or local governments often offer tax breaks or other perks to lure big retailers to their area. It's a reasonable tradeoff, they say, because the stores will be a source of jobs. But rather than driving economic growth, evidence suggests that big supermarkets often drive down wages while putting local companies out of business. Why? Under pressure to increase shareholders' returns, supermarkets find labor costs easier to control than the costs of energy, transport, or other inputs. They can reduce labor costs by hiring more part-time employees, keeping benefits to a minimum, holding back raises, or discouraging union organizing—and increase profits in the meantime. Wal-Mart, the nation's largest corporation, provides health care to 30% fewer workers than the average company in the S&P 500. In fact, one out of every two children of Wal-Mart workers is either uninsured or relies on public health care.¹⁹

A recent study conducted by the San Diego Taxpayers Association in estimated that an influx of big-box stores into San Diego would drive down total wages and benefits for area workers by between \$105 million and \$221 million annually, while dropping \$9 million more in public health costs on the city. Another study in Southern California found that if big box stores entered the grocery industry, wages and benefits would decline by \$2,000 to \$5,600 per worker per year, with upwards of 250,000 supermarket workers affected.²⁰

Along with pay, workers have seen workplace standards decline. A 2004 report by the Democratic Staff of the Committee on Education and the Workforce found that in the last few years, over 100 unfair labor practice charges have been lodged against Wal-Mart, with 43 charges filed in 2002 alone. The labor law violations include the intimidation and dismissal of workers who attempt to organize a union; unlawful surveillance

THE HIDDEN COSTS OF BIG RETAIL

A 2004 report by the Democratic Staff of the Committee on Education and the Workforce estimates that one 200-person Wal-Mart store costs federal taxpayers \$420,750 per year. Low wages paid by the company result in the following additional public costs being passed along to taxpayers:

- \$36,000 a year for free and reduced lunches for just 50 qualifying Wal-Mart families
- \$42,000 a year for Section 8 housing assistance, assuming 3 percent of the store employees qualify for such assistance, at \$6,700 per family
- \$125,000 a year for federal tax credits and deductions for low-income families, assuming 50 employees are heads of household with a child and 50 are married with two children
- \$100,000 a year for the additional Title I expenses, assuming 50 Wal-Mart families qualify with an average of two children each
- \$108,000 a year for the additional federal health care costs of moving into state children's health insurance programs, assuming 30 employees with an average of two children qualify
- \$9,750 a year for the additional costs for low income energy assistance.

of workers; violation of child labor laws; and the denial of breaks and overtime pay to workers as mandated by law. There is not a single Wal-Mart store in the U.S. whose employees are represented by a union.²¹

Notably, poor labor standards tend to impact women disproportionately. They make up a large share of workers in the factories that supply retailers like Wal-Mart and also take many of the service jobs in stores. Sexual harassment of female employees and the denial of promotions to women are other charges that have been leveled against Wal-Mart.²²

Global sourcing drives down wages abroad.

Trade agreements and laws that facilitate outsourcing, the growing network of global transport options, and other factors encourage companies to produce their products using a global network of suppliers. "Global sourcing" means they will seek out the cheapest options available for raw materials, labor, and other inputs—wherever they might be found. It's not unusual to find a packaged food product containing raw ingredients from several different countries; it may have been processed in yet another country before it was shipped to your local supermarket. Global sourcing presents a quandary for consumers,

who can no longer be sure of where their food comes from. The shipping, refrigeration, and packaging needed to keep food from spoiling in a global production system takes a large environmental toll.

Workers producing the raw materials or working in the processing plants struggle in this system as well. Imagine, for example, a banana plantation in a developing country. Powerful supermarkets put pressure on intermediaries or the farm owner to produce for lower and lower cost, threatening to move to another supplier. The supplier, afraid of losing the business, cuts costs by paying his workers less. One study by the UK nonprofit Banana Link found that when UK supermarket giant Tesco dropped its retail banana prices by 30% to attract customers, the wages of workers on supplying plantations declined, their work hours increased, and many were laid off. Said one banana supplier, “We—our company and our workers—are the ones paying the cost of your price wars.”²³

Responsible Purchasing, a UK coalition, finds that many developing country producers sell to brokers or exporters who refuse to give them long-term



A Colombian flower worker stands outside Wal-Mart holding flowers supplied by his company.

Photo courtesy ILRF

contracts. Most producers are given no explanation or lead time for price changes or sudden drops in demand. And if cheaper options are found elsewhere, the supermarket may stop buying from these producers altogether, leaving them and their workers holding the bag.

Now, Let's Fix It

We've gotten to a point where a very small number of stores control a whole lot of the decisions about where our food comes from, how it's produced, and whether or not consumers will have access to it. This system doesn't work for producers, workers, or consumers. But necessity is indeed the mother of invention: communities and organizations around the country and the world are responding to retail concentration in innovative, creative ways,

building food systems that meet their needs. Below, we'll review some of the ways to take action. The resources section at the end will help you get involved.

Tell the Fed: Control concentration! Communities and the organizations that support them have also focused their defensive energies on lobbying the federal government to enact and enforce anti-trust

From the Institute for Local Self-Reliance: Controlling Big Box Development in Your Community

Economic and Community Impact Reviews of Proposed Developments. When a new supermarket proposes coming into a community, the community can conduct a review of the impact the retailer will have on the local economy. It can also hold a public hearing. Communities that have already conducted reviews stretch from Massachusetts to Los Angeles to Homer, Alaska. Towns have also partnered together to form Regional Impact Review groups, which is particularly useful in cases where a large retailer like Wal-Mart will impact multiple towns at the same time. Legislation is pending in several states that would require community economic impact reviews to be conducted before big box retailers can move in.

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Local planning and zoning policies. Planning and zoning ordinances have been used successfully by many communities to the benefit of local retailers. Ordinances provide guidelines for land use and often restrict the size of businesses that locate to the area. In some cases, communities have explicitly stated their preference for local businesses above outside corporate chains. For example, the Kent County, Maryland ordinance lists two of its objectives as “support[ing] locally owned businesses” and “preventing commercial sprawl outside... existing commercial centers.” Towns have also successfully enacted moratoria on retail development while they debate and enact appropriate planning and zoning ordinances.

Big Box taxes. Legislation has been proposed in several states that would levy a tax on big box retailers. In the states where legislation is moving forward, communities have successfully argued that large retail stores impose “hidden” costs on local and state governments through their exploitative use of public services, or on communities through their purchasing practices and tendency to drive down wage rates. Proposed legislation in Maine would levy a 3% tax on big-box retail revenue and transfer the money to programs that serve small businesses and self-employed workers. In Minnesota, a proposed bill would charge a 1-2% tax on retailers that bring in over \$20 million in annual sales and that either pay employees less than a living wage, or hire more than 1/4 of their employees as part-time workers.

legislation. The two laws most relevant to the food retail sector are the Clayton Act, which outlaws mergers that “substantially lessen” competition in a market, and an amendment to that act, the Robinson-Patman Act. Robinson-Patman prohibits discriminatory purchasing and pricing by large retailers.²⁴ Federal enforcement of these laws leaves much to be desired; the Reagan Administration severely curtailed the budgets of anti-trust enforcement agencies and worked to limit their legal purview.²⁵ As a result, enforcement agencies today are understaffed and under-funded. They tend to focus their inquiries on the impact of proposed retail mergers on consumers without considering the impact on the rest of the supply chain.²⁶ That said, there are examples of the tool having been used effectively by community advocates. Following a flood of comments by consumers and others, the Federal Trade Commission denied Ahold’s bid for the Pathmark supermarket chain, as well as Kroger’s bid for the Texas chain Winn-Dixie.²⁷ That slowed consolidation and concentration in food retail. But the federal government needs more pressure to strengthen and enforce the laws.

Build retail alternatives: Farmer-to-consumer options and cooperative producer marketing.

Alternative retail outlets are another common strategy used by producers and consumers to subvert the power of large retailers. Alternative outlets are more than just farmers’ markets, though the prevalence of these markets has increased dramatically in the last ten years. Even in areas where farmers’

markets are not common, producers have found new ways to reach consumers.²⁸ Farm-to-school and farm-to-hospital arrangements have helped diversify food service options. The internet has proven a critical tool for smaller producers who now find they can increase sales through internet advertising and on-line purchasing. They have been helped by projects such as Sustainable Table’s *Eat Well Guide* or Local Harvest, which offer users searchable databases of local food providers across the country (www.eatwellguide.org and www.localharvest.org). And organizations are working to get healthy, local food into low-income urban communities by building relationships between producers and corner stores.

Small producers have also joined together to create larger pools of meat or dairy that can be marketed directly to consumers at reasonable prices. One successful example is Patchwork Family Farms in Missouri, a project of the Missouri Rural Crisis Center and area livestock producers. The marketing cooperative pays producer members an above-market price for



locally raised, antibiotic-free pork and then sells the product directly to consumers. It markets pork directly out of the office of the MRCC, offers an on-line ordering service, and has a local food subscription program to help low- and fixed-income consumers purchase the products. It also convinced a large retailer in Missouri to carry its pork in a special case because consumer demand was so high.²⁹



The Real Value of A New Food System

Research by Stacy Mitchell at the Institute for Local Self-Reliance shows that the time we put into promoting local food retailing is well worth it.³⁰ Keeping out large retailers generates local employment by maintaining demand for local goods and services. It increases the amount of money that returns to the community in the form of wages and supply-chain purchases by local retailers. It encourages creative entrepreneurship and an efficient use of natural resources, community space, and public services. It promotes community cohesion,

ensuring that important economic development decisions are made by community members rather than by outside firms. Having local options for purchasing benefits consumers by increasing competition, innovation, and choice. Local food systems help the environment by reducing “food miles,” the distance food must travel from farm to fork, and the distance consumers have to drive to do their shopping. And maintaining walkable town centers benefits our health. It’s a system that makes sense.

Resources: Learn More and Take Action!

Learning more about supermarket concentration and its effects:

- **The Agribusiness Accountability Initiative** has a wealth of resources, from issue briefs to academic reports. <http://www.agribusinessaccountability.org>.
- Additional resources are available from the **Center of Concern**, http://www.coc.org/index.fpl/1104.html?cms_campaign=3
- The UK coalition **Responsible Purchasing** looks at the reality of the retail sector and proposes ways to improve buying practices. <http://www.responsible-purchasing.org>
- **ActionAid UK's “Who Pays?”** campaign and report document how the drive for low prices and high profits put workers, particularly women, in harm’s way and offers tools for taking action. http://www.actionaid.org.uk/1486/our_campaign.html
- John Hopkins University’s **Center for a Livable Future** carries out academic research on community food security, nutrition, and access to food in low-income urban neighborhoods. http://www.jhsph.edu/clf/programs/eating/eating_sub/res_commfood.html

Taking Action:

- **The International Labor Rights Forum** (<http://www.ilrf.org>) has excellent resources on big box stores and their impact on workers.
- **Tescopoly Alliance**, a coalition of organizations concerned with the impacts of supermarket power, has research, action tools, and examples of successful community campaigns around the world. <http://www.tescopoly.org>
- **The New Rules Project** of Minnesota’s Institute for Local Self-Reliance is a great source of information on retail concentration in the United States—policy updates, community tools, and research on the effects. <http://www.newrules.org/retail/index.php>
- **The UK Food Group’s** report *Food Inc.* details the impact of buyer power on farmers and farm workers. <http://www.ukfg.org.uk/docs/UKFG-FoodInc-Nov03.pdf>
- **The Sustainable Agriculture Coalition** has all the tools you need to improve federal policies that support local food systems: <http://msawg.org>
- **Wal-Mart Watch** has resources to take action on Wal-Mart, the world’s largest retailer. <http://walmartwatch.com>

Finding local food options in your community:

- **Sustainable Table’s** *Eat Well Guide*, www.eatwellguide.org
- **Local Harvest**, www.localharvest.org

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