



# How Corporate Consolidation Broke America's Grocery System: A Companion Policy Brief to ILSR's Interactive Map of Grocery Stores and Food Deserts

By Stacy Mitchell and Katy Milani

## Summary

Access to affordable, healthy food is a leading concern for American families. Grocery prices remain high, while millions of people live in communities without a nearby store selling fresh food. Food deserts have become more widespread and entrenched, even as people spend more than ever on groceries.

A core driver of these problems is the concentration of market power in the grocery industry—a shift that traces back to a critical policy decision in the 1980s, when federal regulators stopped enforcing the Robinson-Patman Act (RPA), a central pillar of antitrust law. Suspending enforcement allowed suppliers to discriminate in pricing in favor of the largest chains, tilting the playing field against independent and small-chain grocers. The result was a wave of consolidation that reshaped the grocery sector, weakened competition, pushed prices upward, and generated food deserts. Reversing these trends requires restoring fair supplier pricing by reviving enforcement of the law.

To illuminate how consolidation shapes food access, the Institute for Local Self-Reliance (ILSR) created an [interactive map](#) that shows food deserts alongside the location of grocery stores color-coded by whether they are independent, small chains, large chains, or megachains like Walmart and Kroger.<sup>[1]</sup>

This issue brief is a companion to the map. It explains how abandoning fair-pricing law led to consolidation, how that consolidation fueled both rising prices and the spread of food deserts, and the critical role independent grocers play in eradicating food deserts and building resilient local food systems. The brief also includes excerpts from the map—focused on specific cities, rural regions, and congressional districts—with commentary that shows how these dynamics have played out on the ground. It concludes with specific steps federal and state policymakers can take to reverse course and fix decades of policy failure.

Photo Credit: Dreamstime@Stevehymon

<sup>[1]</sup> These maps are presented at the Congressional district level.

**The Institute for Local Self-Reliance** is a national research and advocacy organization that partners with allies across the country to build an American economy driven by local priorities, accountable to people and the planet.

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# How Abandoning the Robinson-Patman Act Triggered Consolidation in the Grocery Industry

Congress enacted the Robinson-Patman Act in 1936 to safeguard fair competition and ensure that local, independent retailers could compete on equal footing with large chains. The law requires suppliers to offer the same pricing and terms to all retail buyers. Discounts are allowed when they reflect actual differences in a supplier's costs—for example, offering a reduced price for shipping a full truckload versus a single case—but only if those discounts are made available to all retailers on the same terms.

For decades, enforcement of this policy helped sustain a remarkably competitive grocery industry. Independent grocers thrived alongside large chains like Kroger and Safeway. Virtually every neighborhood and small town had a grocery store, and many had several.<sup>1</sup> Food deserts were rare because local people could start and sustain independent stores on a level playing field. The competitive dynamism that RPA fostered benefited consumers, workers, and local communities alike.

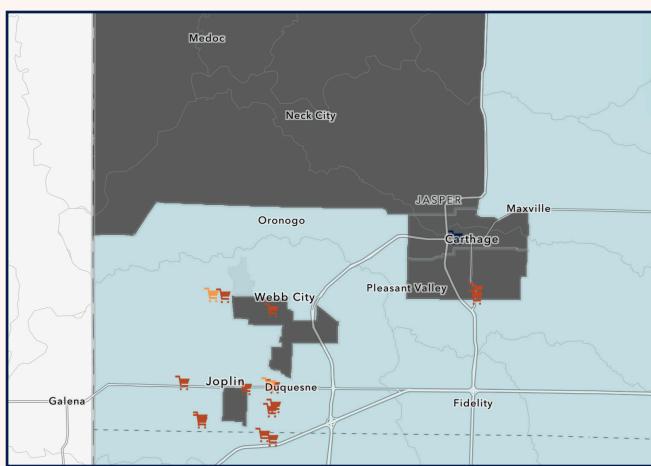
That began to change in the early 1980s, when the Federal Trade Commission effectively stopped enforcing the law as part of a broader retreat from antitrust enforcement. This shift was rooted in the belief that allowing corporations to grow larger and more powerful would benefit consumers. Instead, it triggered one of the most damaging policy failures of the past half-century.

With RPA enforcement abandoned, Walmart seized the opportunity to leverage its growing size to extract preferential prices from suppliers—deals that were unavailable to smaller grocers, who were instead charged more for the same products.<sup>2</sup> Other grocery chains sought to follow suit, triggering a wave of mergers as they tried to match Walmart's buyer power. Today, the top four grocery retailers capture nearly 60 percent of grocery spending.<sup>3</sup> Walmart alone accounts for about one-quarter.<sup>4</sup>

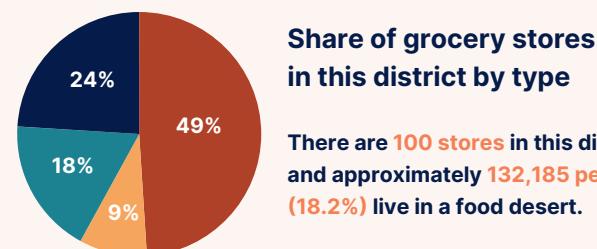
As independent grocers faced steadily higher wholesale costs, they were forced to raise their prices. Shoppers—especially in low-income and working-class neighborhoods, where people could least afford to pay more—were increasingly pushed toward the big chains. Independent grocers began to disappear rapidly. Since the early 1980s, their market share has fallen from over 50 percent to about 25 percent.<sup>5</sup>

Today, in many metro areas and smaller communities, people have few real choices about where to shop. Local grocery markets are highly concentrated, with just one or two megachains capturing the majority of sales in most places. As competition has collapsed, food deserts and higher prices have followed.

## Missouri Congressional District 7



- Independent:** Under 10 locations and privately / locally owned
- Large Chain:** More than 100 locations (excluding Megachains)
- Small Chain:** 10–100 locations (some privately / locally owned)
- Megachain:** All brands owned by the ten largest grocery retailers



Grocery consolidation is stark in Missouri's 7th Congressional District, which includes the metro areas of Joplin (about 200,000 people) and Springfield (roughly 500,000). Walmart controls more than 80 percent of grocery sales in Joplin and nearly two-thirds in Springfield, leaving the second largest grocer, Price Chopper, far behind at just 10 percent.<sup>6</sup>

Missouri ranks among the worst states for food access, with nearly one in five residents living in a food desert, including many in the Springfield and Joplin metros. In the 7th District's rural areas, the map shows that many additional food deserts would emerge if the remaining independent grocers closed.

# The Rise in Food Deserts

Food deserts are a direct result of the decision to abandon the Robinson-Patman Act.<sup>7</sup> When the law was enforced, prior to the 1980s, large grocery chains couldn't ignore rural towns and low-income neighborhoods if they wanted a chance to compete for the dollars those communities spent on food. Local grocers already served these areas and, thanks to antitrust enforcement, had access to fair supplier pricing. Chains had to open stores locally — or lose the business.

As independent grocers disappeared, that competitive pressure vanished. Large chains no longer faced locally owned rivals in many rural towns and urban neighborhoods, which meant they no longer needed to maintain local stores to capture local spending. Instead, they could rely on residents to travel to another town or neighborhood to shop at their other locations. Meanwhile, those without the means to travel were left to get by on the meager selection of processed foods available at dollar stores and gas stations.

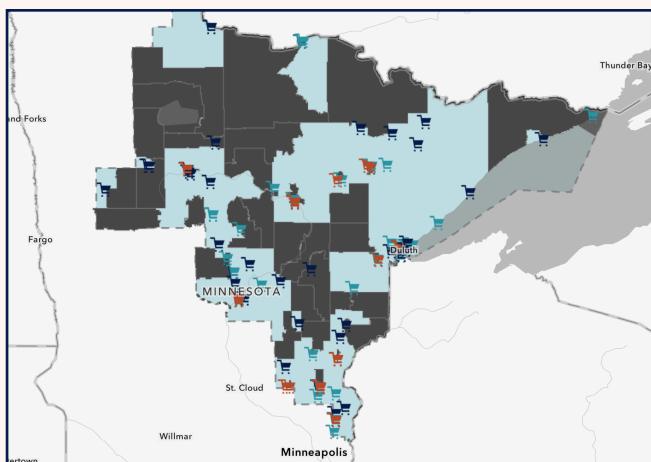
Even with clear demand for grocery stores in these communities, entrepreneurs who attempt to open new stores in underserved areas rarely succeed.<sup>8</sup> Without access to

fair supplier prices, they stand little chance of reversing the outflow of dollars to distant chain supermarkets.

Yet, despite this pattern, consolidation has rarely been recognized as the primary driver of food deserts. The prevailing explanation is that these neighborhoods can't sustain a supermarket;<sup>9</sup> they're either too poor or too sparsely populated to generate enough spending on groceries. But poverty and small towns are not new. Food deserts are. They arrived relatively recently, beginning in the late 1980s, as the suspension of RPA enforcement undermined competition and drove consolidation in the grocery sector.<sup>10</sup>

Over the last few decades, state and federal lawmakers have launched a slate of programs aimed at luring supermarkets to underserved communities, often by offering subsidies. These efforts have largely failed because they misunderstand the root of the problem.<sup>11</sup> This crisis will persist until policymakers and antitrust enforcers reverse the policy choice that allowed consolidation to hollow out local grocery markets in the first place.

## Minnesota Congressional District 8

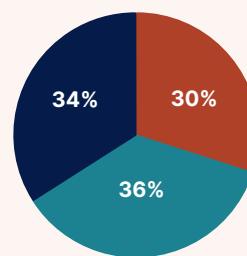


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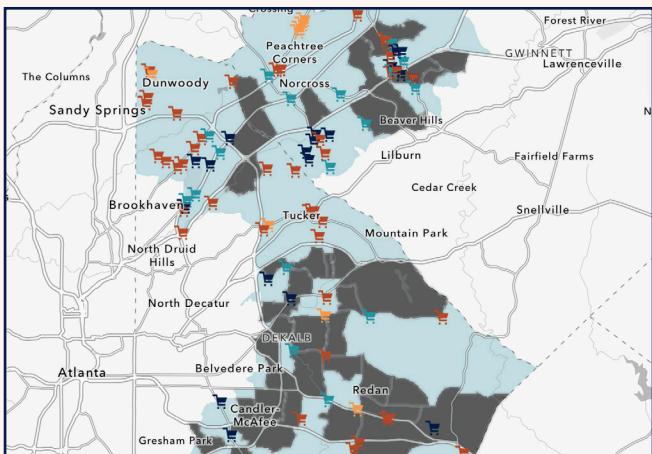
### Share of grocery stores in this district by type

There are **103 stores** in this district, and approximately **185,464 people (26.5%)** live in a food desert.

Minnesota is a cornerstone of the Midwest's breadbasket, yet Minnesota's 8th Congressional District, which spans one-third of the state, struggles with food access. Nearly 27 percent of its approximately 185,000 residents live in food deserts, including rural communities, Indigenous nations, and parts of the city of Duluth.

Local grocers warn that the situation is fragile. Almost half of Minnesota grocers are concerned that they will go out of business in the next five years.<sup>12</sup> "If I were king, we [grocers] would all pay the same [wholesale] price for goods," said one grocer surveyed by University of Minnesota Extension.<sup>13</sup> There are a host of programs designed to eradicate food deserts, but grocers' access to fair pricing is an essential solution.

## Georgia Congressional District 4

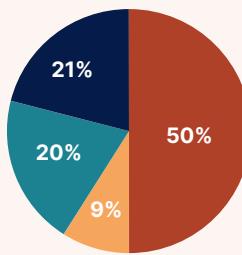


Independent: Under 10 locations and privately / locally owned

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Megachain: All brands owned by the ten largest grocery retailers



### Share of grocery stores in this district by type

There are **96 stores** in this district, and approximately **228,710 people (33.9%)** live in a food desert.

Georgia's 4th Congressional District is one of three congressional districts in Atlanta, a city where food deserts have long tracked race and income.<sup>14</sup> As independent grocers that once served these neighborhoods vanished, and megachains bypassed the city's poorer, predominantly Black neighborhoods, chain dollar stores rushed into the void.

Today, most of the metro area's more than 100 dollar stores are located in poorer and majority-Black neighborhoods.<sup>15</sup> Not only do the largest dollar store chains typically not sell fresh food, but they also benefit from discriminatory pricing by suppliers — effectively locking in their hold on communities and perpetuating food deserts.<sup>16</sup>

## A Hidden Driver of Rising Food Prices

The failure to enforce the Robinson-Patman Act has pushed grocery prices higher through two related but distinct dynamics. First, in cities and towns where one or two megachains, such as Walmart or Kroger, dominate the market, those chains have been able to raise prices and inflate their profit margins without losing business, because shoppers have few or no alternatives.<sup>17</sup>

More significantly, weak enforcement also reshaped the supply side of the grocery market. As the largest retail chains grew larger and more powerful, food and beverage manufacturers merged with one another in a bid to match the scale of their big retail customers. This wave of consolidation left just a handful of major manufacturers controlling most of the brands on supermarket shelves.

Today, these dominant suppliers face so little competition that they have been able to raise prices across the board. In recent years, major food companies — including Tyson Foods, Unilever, and PepsiCo — have increased their prices and profits without losing customers, a sign of outsized market power.<sup>18</sup>

These cost increases actually benefit the largest grocery chains, which continue to pull further ahead. That's because suppliers raise prices unevenly — charging smaller retailers more while shielding Walmart and Kroger from the full increases. This allows the largest chains to continue to undercut competitors. As a result, consolidation at both the retail and supplier levels reinforces itself, driving prices higher

while funneling still more consumer spending to the biggest chains.

A recently unsealed Federal Trade Commission complaint against PepsiCo provides a stark window into how this system works in practice.<sup>19</sup> The complaint alleges that Pepsi conspired with Walmart to push grocery prices higher, in what appears to be a blatant violation of the Robinson-Patman Act. Pepsi told investors that losing Walmart as a customer would have a materially adverse effect on its business. To keep Walmart satisfied, Pepsi executed a multi-year strategy to ensure that Walmart always enjoyed lower retail prices on Pepsi products than its competitors — a “price gap” that Pepsi actively created and enforced across the market.

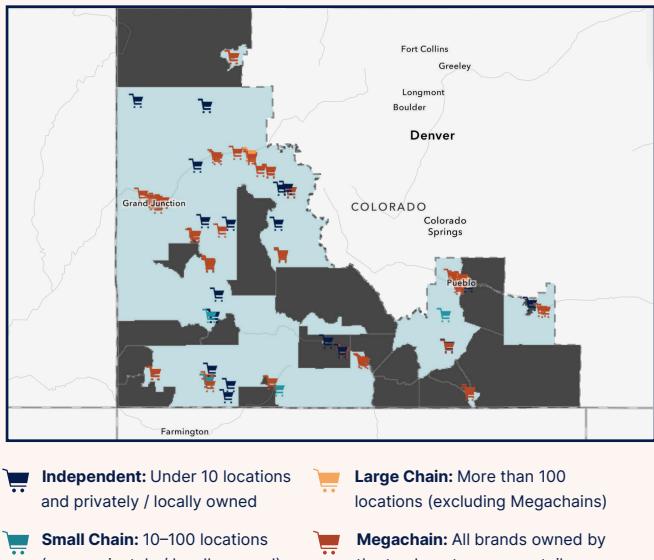
According to the complaint, Pepsi tracked prices nationwide to identify any retailer selling Pepsi products for less than Walmart. When that happened, executives moved quickly to “restore” Walmart’s price advantage, often by raising wholesale prices or cutting promotional support to the offending retailer. Internal communications described these actions explicitly as efforts to keep Walmart “advantaged” and to prevent shoppers from shifting their purchases elsewhere.

One striking example involved Food Lion, which serves many low- and middle-income communities. Pepsi labeled Food Lion the “worst offender” for pricing Pepsi products below Walmart’s levels. In response, Pepsi developed a multi-year plan to discipline the chain by raising the prices Food Lion

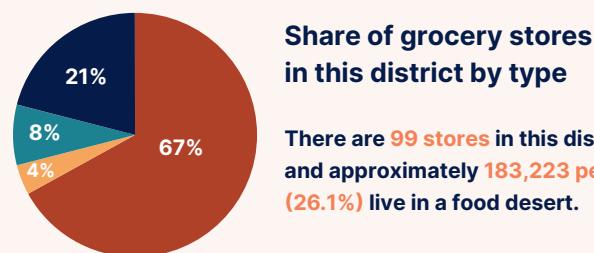
paid for Pepsi products faster than the rest of the market. The goal was to force Food Lion's shelf prices up and steer customers back to Walmart.

The FTC alleged that this arrangement between Pepsi and Walmart has persisted for more than a decade and is ongoing. But despite the detailed evidence laid out in the complaint, which was filed during the Biden administration, the Trump-appointed FTC abandoned the case in 2025.

## Colorado Congressional District 3



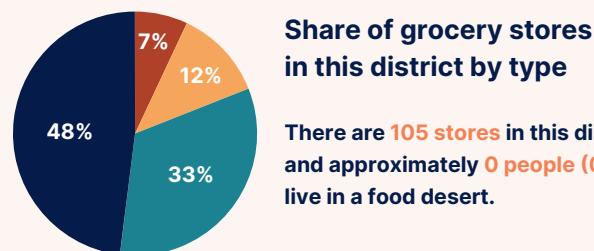
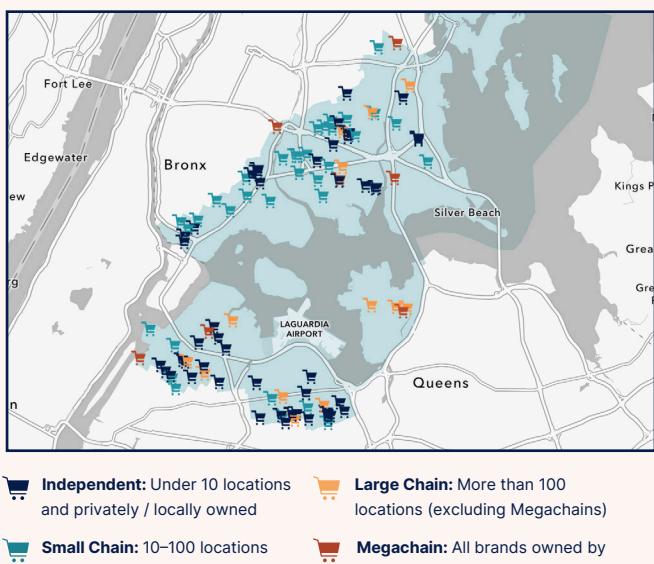
These practices are not unique to PepsiCo. The Robinson-Patman Act was enacted to prevent dominant suppliers and retailers from engineering markets in this way — suppressing competition and normalizing higher prices. What the FTC's complaint makes clear is that, in the absence of enforcement, supplier consolidation has become a powerful and largely hidden driver of rising grocery prices, regardless of where people shop.



Grocery choices are slim in Colorado's rural mountain towns and eastern plains, where mega-retailers dominate and grocery deserts stretch across large swaths of the state. That dominance came into sharp focus in 2024, when two megachains, Kroger and Albertsons, attempted to merge. Together, the two chains have over 50 percent market share in Colorado, and they are even more dominant in many local areas.<sup>20</sup>

Colorado's Attorney General Phil Weiser, along with the Federal Trade Commission, successfully blocked the merger, warning that it would result in fewer customers for farmers and higher prices for consumers. When the proposed merger went to trial, the consequences of their dominance became public. During the trial, Kroger officials admitted they were able to hike prices in multiple Colorado communities without losing customers because they faced no real competition.<sup>21</sup>

## New York Congressional District 14



New York City has a comparatively healthy grocery market, with lots of independent grocers and few consolidated chains. But New Yorkers still struggle with food access — not because of a lack of stores, but because prices are high. A key reason is the outsized buyer power of the nation's largest grocery chains. Dominant retailers demand special deals from suppliers that smaller retailers cannot access.

These discriminatory prices shape markets nationwide. Independent grocery stores in New York pay more to stock the same products and those higher costs are passed onto consumers. The result is high prices even in a city with robust retail competition — showing how concentrated buyer power at the national level can undermine food access even in places where the biggest chains operate relatively few stores.

# Independent Grocers are Trying to Hold On—and Eliminate Food Deserts in Their Communities

Independently owned grocery stores play a crucial role in both food access and competition. In rural areas and communities of color that grocery chains now bypass, local grocers are often the only places where people can buy fresh food. With access to fair supplier pricing, these stores could also create crucial competition for dominant chains—helping hold prices down and creating shelf space for smaller food manufacturers that could challenge giants like PepsiCo and General Mills.

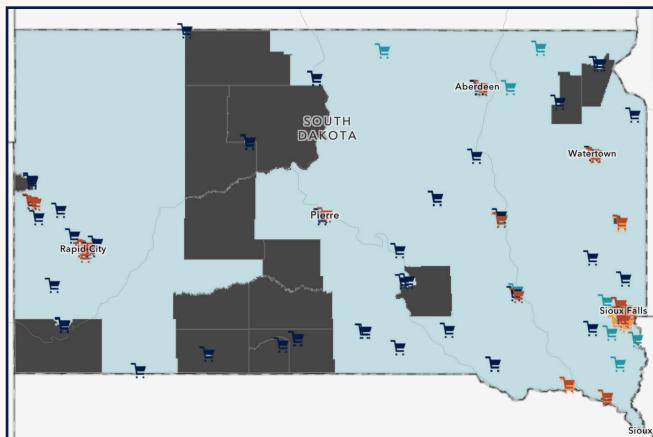
Independent grocers also deliver outsized economic benefits to their communities. In Kansas, the average grocery store in towns of under 3,000 people contributes \$644,000 to the local economy, employs 17 people, and generates 20 percent of local sales and property tax dollars.<sup>22</sup> These stores are anchors of resilient local food systems as well: compared to

big chains, they carry more locally produced foods, opening up distribution channels for local farmers and helping local food companies start and grow.

Consider Farm Fresh, a local store serving the Shockoe Bottom neighborhood in Richmond, Va. It competes on quality, service, and price wherever it can, explains co-owner Raphael Strumlauf. But there are products that he can't get or sell at competitive prices because the big chains are bullying suppliers for better deals. Strumlauf is well aware of the Robinson-Patman Act: "Simply put, if the law was enforced, we could offer lower prices."

Independent grocers are doing the work of holding food deserts at bay and sustaining local economies. What they lack is a fair playing field.

## South Dakota At-Large Congressional District

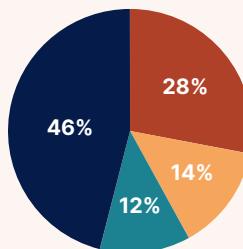


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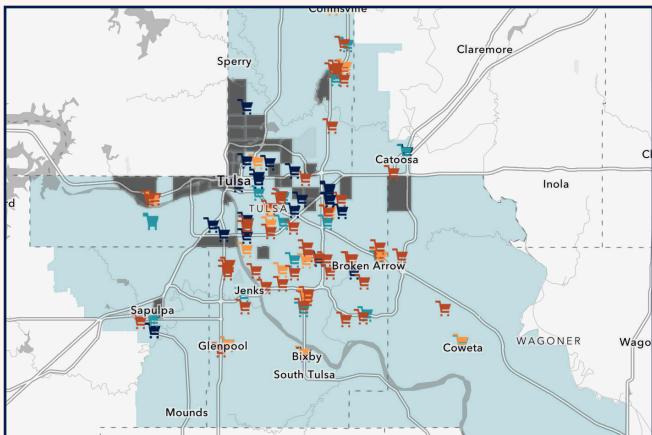
### Share of grocery stores in this district by type

There are **113 stores** in this district, and approximately **120,657 people (14.8%)** live in a food desert.

For more than a century, independent grocers have been the backbone of food access in rural South Dakota. RF Buche, who has run his family's 121-year-old grocery chain, Buche Foods, for more than 25 years, now operates 6 locations across the state—including in communities that would otherwise be food deserts. Like many independent grocers, Buche is deeply embedded in his communities and committed to ensuring residents have access to healthy food. But his stores are increasingly squeezed by unfair pricing. His wholesale prices have risen by as much as 40 percent over the last five years, depending on the item.<sup>23</sup>

Meanwhile, Walmart sells the same items for less than Buche can buy them for: a dozen eggs for \$2.27 when his wholesale cost is \$3, or iceberg lettuce for \$1.88 when he pays \$4.46.<sup>24</sup> "My customers just don't understand when they look at my shelf price and Walmart's shelf price," Buche says. Enforcing and strengthening the Robinson-Patman Act would end these practices and ensure independent grocers have a fair shot—helping ensure that rural South Dakota communities don't lose their only places to buy healthy food.

## Oklahoma Congressional District 1

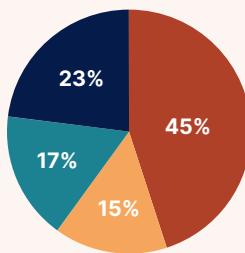


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### Share of grocery stores in this district by type

There are **106 stores** in this district, and approximately **85,337 people (12.1%)** live in a food desert.

Walmart's takeover of Tulsa, Okla., followed a familiar national pattern. As it opened dozens of supercenters and stand-alone supermarkets in the city's outer reaches and surrounding suburbs, competing grocery stores — especially small, family-owned chains and independents — closed in droves. By 2012, Walmart controlled 55 percent of the Tulsa metro's grocery market.<sup>25</sup> But its expansion bypassed Tulsa's northern and western neighborhoods, which became food deserts.

In 2017, Tulsa City Councilor Vanessa Hall-Harper began pushing back. She organized local officials to stop the spread of predatory dollar store chains and worked to support a new grocery store in North Tulsa. The result was Oasis Fresh Market, which opened in 2021. Oasis not only feeds North Tulsa locals but also attracts customers from all over the city. Despite its success, keeping Oasis financially afloat remains difficult. Because the Robinson-Patman Act is not being enforced, Oasis pays higher prices to suppliers — a reminder that local solutions can only go so far without restoring fair pricing rules nationwide.

## Reviving the Robinson-Patman Act

Reactivating the Robinson-Patman Act would stop powerful retailers from using their size and financial clout to eliminate independent businesses and dominate markets. It would help lower grocery prices for consumers, reduce food deserts over time, and compel big retailers to compete on service and efficiency rather than sheer buying power.

### What Federal and State Antitrust Enforcers Should Do

State attorneys general have the authority to investigate and prosecute violations of the Robinson-Patman Act. They should engage directly with grocery retailers and suppliers operating in their states to identify where discriminatory pricing may be occurring and where enforcement is warranted. State enforcers should also review the evidence detailed in the unsealed complaint against PepsiCo and consider bringing their own case under federal or state law.

At the federal level, the Federal Trade Commission must take seriously its responsibility to enforce the law. Its decision to abandon the PepsiCo case sent a clear signal to dominant retailers and suppliers that price discrimination would go

unchecked. While the FTC has long been the primary RPA enforcement agency, the Department of Justice's Antitrust Division also has authority to enforce the law and should do so.

### What Congress Can Do

Congress has powerful tools at its disposal to restore competition in grocery markets. Lawmakers should hold hearings to expose how consolidation and price discrimination are harming consumers, independent businesses, farmers, and communities — and to hold federal agencies accountable for enforcing the law. Congress should consider using its investigative powers to examine the grocery industry more deeply, similar to the House Judiciary Committee's investigation into the Big Tech companies in 2020.

In addition, Congress should consider strengthening the Robinson-Patman Act itself. Legislative updates could clarify statutory language and address court decisions that have weakened enforcement, including barriers that make it difficult for private plaintiffs to bring cases.

## What State Lawmakers and Enforcers Can Do

States also have a critical role to play. State lawmakers can introduce their own price discrimination laws and strengthen those already on the books. Only nine states currently have price-discrimination bans that mirror or exceed the Robinson-Patman Act. Attorneys general in states with price-discrimination laws should look for opportunities to enforce those laws in state courts.

Lawmakers in states without a price discrimination ban should introduce and pass prohibitions to ensure pricing fairness within their states' borders. As of early 2026, at least four states — Maine, Minnesota, New York, and Rhode Island — had introduced legislation that would strengthen protections against price discrimination in the grocery industry.<sup>26</sup> ■

## Further Reading



### Robinson-Patman Act — Fact Sheet

ILSR, 2025



### The Great Grocery Squeeze

*The Atlantic*, 2024



### The Policy Shift That Decimated Local Grocery Stores

ILSR, 2024

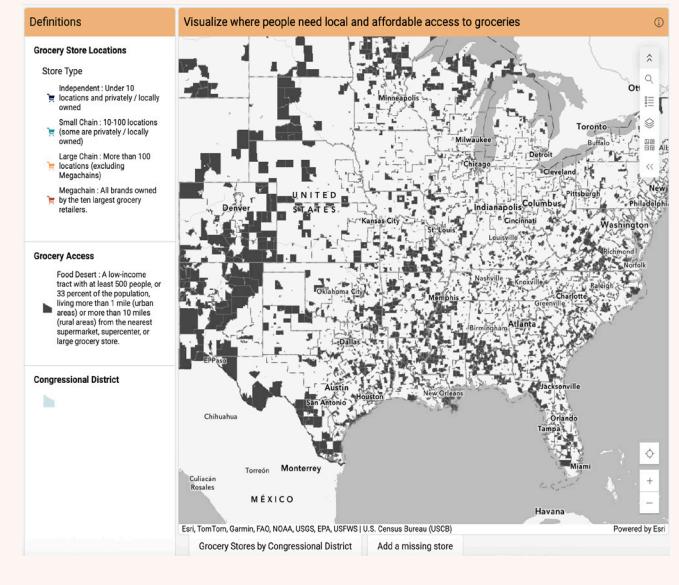


### The Dollar Store Invasion

ILSR, 2023



### Mapping Food Deserts and Grocery Store Consolidation



# Appendix 1: Map Methodology

**Data Sources:** This interactive map integrates three primary datasets to visualize grocery store access across U.S. congressional districts. This spatial integration allows users to explore grocery store distribution and food access challenges within individual congressional districts.

- **Grocery Store Locations:** Grocery store locations were obtained from the USDA Food and Nutrition Service SNAP Retailer Locator database.<sup>27</sup> This dataset includes all stores authorized as SNAP retailers. The map only includes retailers defined as a “superstore” or “supermarket.” We filtered out SNAP-authorized retailers that are not full-service grocery stores, such as convenience stores and dollar chains.
- **Food Desert Geographic Designations:** The food desert geographic areas were derived from the USDA Economic Research Service Food Access Research Atlas.<sup>28</sup> This dataset identifies census tracts that meet the criteria for low food access based on distance to supermarkets and low-income characteristics. The Atlas defines low-access areas as census tracts where a significant number or share of residents are more than one mile (urban areas) or 10 miles (rural areas) from the nearest supermarket.
- **Congressional District Boundaries:** Geographic boundaries for U.S. congressional districts were used to organize and aggregate the data, enabling analysis of grocery store access and food desert prevalence by district. The congressional district boundaries are for the 119th Congress.

**Grocery Retailer Designations:** ILSR labeled all grocery retailers under one of the following designations in order to visualize the different types of stores in a congressional district. Stores were classified into four distinct categories based on store count and ownership structure:

- **Independent:** Grocers operating fewer than 10 locations that are privately or locally owned. These represent single-store operators and small local chains that serve individual communities or regions.
- **Small Chains:** Retailers operating between 10-100 locations. This category includes both privately/locally owned regional chains and some corporate-owned operations that maintain a limited geographic footprint.
- **Large Chains:** Retailers operating more than 100 locations, excluding those owned by the ten largest grocery conglomerates. This category captures significant regional and national operators that have substantial market presence but are not among the industry’s dominant players.
- **Megachains:** All retail brands and banners owned by the ten largest grocery retailers in the US. This classification captures market concentration by grouping all stores under common corporate ownership, regardless of the brand name on the storefront.

*\*With these definitions, we may have misidentified some grocers. Please email us with any corrections. [info@ilsr.org](mailto:info@ilsr.org)*

# Notes

1. Stacy Mitchell. "The Great Grocery Squeeze: How a Federal Policy Change in the 1980s Created the Modern Food Desert." *The Atlantic*, Dec. 1, 2024, <https://www.theatlantic.com/ideas/archive/2024/12/food-deserts-robinson-patman/680765/>.
2. Stacy Mitchell, "The Policy Shift That Decimated Local Grocery Stores," *Institute for Local Self-Reliance*, November 2024, <https://ilsr.org/articles/policy-shift-local-grocery/>.
3. Ibid.
4. Chain Store Age, "Leading Grocery Stores in the United States in 2022 and 2023, by Market Share," *Statista*, March 8, 2024, <https://www.statista.com/statistics/1450393/leading-grocery-store-by-market-share-us/>.
5. Stacy Mitchell, "The Policy Shift That Decimated Local Grocery Stores," *op. cit.*
6. Chain Store Guide, *Grocery Industry Market Share Report*, 2023.
7. The USDA's definition of a food desert is a low-income census tract where the nearest grocery store is more than 10 miles away in a rural area or more than one mile away. U.S. Department of Agriculture, Economic Research Service, "Food Access Research Atlas: Documentation," accessed January 21, 2026, <https://www.ers.usda.gov/data-products/food-access-research-atlas/documentation>.
8. Molly Parker, "The Government Spends Millions to Open Grocery Stores in Food Deserts. The Real Test Is Their Survival." *ProPublica*, August 9, 2024, <https://www.propublica.org/article/food-desert-grocery-store-cairo-illinois>.
9. Stacy Mitchell. "The Great Grocery Squeeze: How a Federal Policy Change in the 1980s Created the Modern Food Desert." *op. cit.*
10. Stacy Mitchell, *ibid*; (The term *food desert* was invented in the mid-1990s by a task force studying this relatively new problem. Before that, rural places and poor communities were able to rely on having at least one grocery store, sometimes more. Steven Cummins and Sally Macintyre, "Food Deserts"—Evidence and Assumption in Health Policy Making," *BMJ* 325, no. 7361 (August 24, 2002): 436–38, <https://doi.org/10.1136/bmj.325.7361.436>.)
11. Molly Parker, *op. cit.*
12. University of Minnesota Extension Regional Sustainable Development Partnerships, "2019–2020 Minnesota Rural Grocery Survey Report," November 2020, <https://conservancy.umn.edu/items/0a2d7afa-af41-4674-86a1-869bdf7c851f>.
13. Ibid.
14. Rob Spahr, "Report Shows Majority-Black, Low-Income Neighborhoods Have Less Access to Fresh Produce," Emory University, September 19, 2023, [https://news.emory.edu/stories/2023/09/hs\\_fresh\\_produce\\_report\\_19-09-2023/story.html](https://news.emory.edu/stories/2023/09/hs_fresh_produce_report_19-09-2023/story.html).
15. Institute for Local Self-Reliance, "Maps Show Alarming Pattern of Dollar Stores' Spread in U.S. Cities," July 14, 2025, <https://ilsr.org/article/independent-business-new-maps-dollar-stores-spread/>.
16. Stacy Mitchell, Kennedy Smith, and Susan Holmberg, "Dollar Store Invasion," *The Institute for Local Self-Reliance*, 2023, <https://ilsr.org/article/independent-business-report-dollar-store-invasion/>.
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