Global restructuring in retail: What impact on labor?

Chris Tilly
Department of Regional Economic and Social Development
University of Massachusetts Lowell

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The strike and protests by the Korean Confederation of Trade Unions against the E.Land retail chain in July and August 2007 brought to Korea's attention the difficult work situation of many retail employees (Lim and Wohn 2007 UNI Commerce 2007). E.Land workers went on strike when the company fired over 1,000 irregular workers just before a law protecting these workers went into effect. The strike and the ensuing protests, which mobilized thousands of unionists to block E-Land stores, reflect two important facts about retail work—one very old, the other quite new. The long-standing fact is that retail workers in South Korea are a disadvantaged group: for instance, only 28 percent of them are covered by employment insurance, compared to 37 percent of all workers and 69 percent of manufacturing workers (calculated by author from Korean Ministry of Labor 2007). Still, working conditions in retail were not a major concern for the Korean labor movement as long as the sector was dominated by small family businesses. That leads us to the new fact: the growing dominance of retail by giant corporations, often global in scale.

Big business is establishing supremacy in retail not just in Korea, but in most of the world. In this article, I start by briefly summarizing the main trends in global retail. I look at the impact on labor of these trends in the United States and Mexico, and then explore how the broader trends and the labor impacts vary across different national context. I turn to discussion of patterns in Asia, and then wrap up with brief conclusions.

I will place particular emphasis on the cases of the United States and Mexico, and the particular role of Wal-Mart—the largest retailer (and largest private corporation) in the world, and the most important one in the United States and Mexico. My research has focused on these cases, but of course they are relatively remote from Korea, where Wal-Mart withdrew in 2006 after fighting a losing competitive battle. Even so, I will argue that the lessons from these distant events have important global implications, extending to Korea as well.

Retail trends

Three big changes have swept the global retail industry in recent decades: (1) "supermarketization", (2) globalization, and (3) modern discounting. The first trend, the spread of the modern supermarket format to replace older retail forms such as the traditional marketplace or small corner stores, reached different parts of the world at different times. Supermarketization was largely complete in the United States by 1950, with the grocery chain A&P occupying the dominant position at that time (Gwynn 2007). In Western Europe and Japan, supermarkets took root as part of the growth boom after World War II. For example, France-based Carrefour, today the second largest retailer in the world, built its first supermarket in 1960 (Carrefour 2007); Japan's AEON grew out of local supermarket chains established in the 1950s (Funding Universe 2007). In other parts of the world, however, the shift to supermarkets occurred much later. In Latin America, for instance, Thomas Reardon and Julio Berdegué reported:

> Supermarkets are now dominant players in most of the agrifood economy of Latin America – having moved from a rough-estimate population-weighted average of 10-20% in 1990 to 50-60% of the retail sector in 2000. In one globalizing decade, Latin America retail made the change that the U.S. retail sector made in 50 years! (Reardon and Berdegué 2002, p.371)

Booz-Allen Hamilton (2003) pointed out that the degree of penetration of the market by large supermarkets is closely tied to a nation's income level. Based on their estimates, a country at Korea's level of GDP per capita should expect large supermarkets to claim about 70 percent of the consumer goods market. Even in Africa, the world's poorest region, South African supermarket chains as well as French retailers Casino and Carrefour have a growing footprint (Planet Retail 2007).

The second trend, globalization, is an outgrowth of consolidation and saturation of domestic retail markets in the richer countries. Local supermarket chains merged into or were acquired by national chains, radically concentrating the retail industry in many countries. For example, JUSCO, the predecessor to Japan's AEON, was formed by a 1969 merger between regional chains Okadaya, Futagi, and Shiro (Funding Universe 2007). Because of the huge territory of the United States, consolidation there lagged—but then took off in the 1990s. Between 1992 and 2000, the share of supermarket sales controlled by the top five chains jumped from 27 percent to 43 percent (Wrigley 2002). For similar reasons, U.S. chains were slower to globalize than their counterparts in other countries. Retailers in Europe in particular began globalizing early. Germany's Metro (the world's third-largest retail corporation) debuted its first store outside Germany in 1968, Carrefour opened its first store outside France in 1969, Dutch retailer Royal Ahold acquired a U.S. firm as early as 1977, and AEON set up its first store outside Japan in 1985 (Carrefour 2007, Funding Universe 2007, Hoovers.com 2007, Royal Ahold 2007). Wal-Mart, on the other hand, first ventured abroad only in 1991, by which time Carrefour was operating in seven countries as far-flung as Taiwan and Brazil (Carrefour 2007, Wal-Mart 2007). Planet Retail (2007) reported that the top ten retailers in the world controlled 18 percent of the *global* grocery market in 2005. Today Carrefour operates in 29 countries, Metro in 30, and British cosmetic retailer The Body Shop in 55 (Tilly 2007).

The third trend is modern discounting. Discounting, a retailing strategy that trades off lower prices for larger volumes sold in order to benefit from economies of scale, was pioneered in the United States by Woolworth in the late 19th century and A&P in the 1920s (Gwynn 2007, Hugill 2006). However, Wal-Mart and its global counterparts have added two new elements to this model (Lichtenstein 2005). One is the application of highly automated, computer-controlled logistical systems to reap additional scale advantages. The other is to wield their enormous buying power to wrest the dominant position in supply chains away from manufacturers, and thus to squeeze never-ending price reductions out of their suppliers. According to retail analysts IGD (2007), for a typical large French retailer, the "front margin" of selling price over the invoice cost of goods is 5 percent of the selling price, whereas the "back margin" of discounts and services provided by the supplier amounts to 25 percent. Because Wal-Mart is the largest global practitioner of this model, it is sometimes called "Wal-Martization."

Impacts on labor: The United States and Mexico

What is the impact of these new retail trends on labor? Generalizations are risky, so instead I present here two specific cases, the United States and Mexico. These two countries bracket Korea in income level: Mexico's GDP per capita is about $8,000, Korea's $19,000, and that in the U.S. $45,000. As Table 1 shows, there are striking similarities in retail work in the United States and Mexico. In both countries, retail is a large employer, with disproportionately female employment, and low wages relative to the average. In addition, Wal-Mart is the largest retailer and largest private employer in both countries.

Table 1: Similarities in retail labor in the United States and Mexico

	U.S.	*Mexico*
Retail as proportion of nonagricultural private employment	21.2%	21.0%
Women as percentage of retail workforce	52.5%	51.5%
Ratio of percentage of women employed, retail/all industries	1.11	1.44
Median retail wage as percentage of wage for all industries	68.2%	87.9%

Source: Tilly 2002. Statistics for various years 1999-2001.

However, as Table 2 reveals, there are also important differences. In the United States, part-time work is common in retail, workers are less likely to be self-employed unpaid, and retail establishments are, on average, relatively large. In Mexico, to the contrary, retail workers work extra-long hours, are more likely to be self-employed or unpaid, and business units are tiny. In part, these differences reflect the fact that supermarketization is essentially complete in the United States, whereas in Mexico small, family-run businesses in which family members work long hours continue to be important. A second source of the hours difference is that in the United States large retailers provide part-time workers with fewer fringe benefits and in many cases lower wages than full-timers; in Mexico, all workers are entitled by law to the same basic fringe benefits, and the minimum wage is defined as a *daily* rate. Thus, in Mexico, large retailers would gain no advantage by employing part-timers.

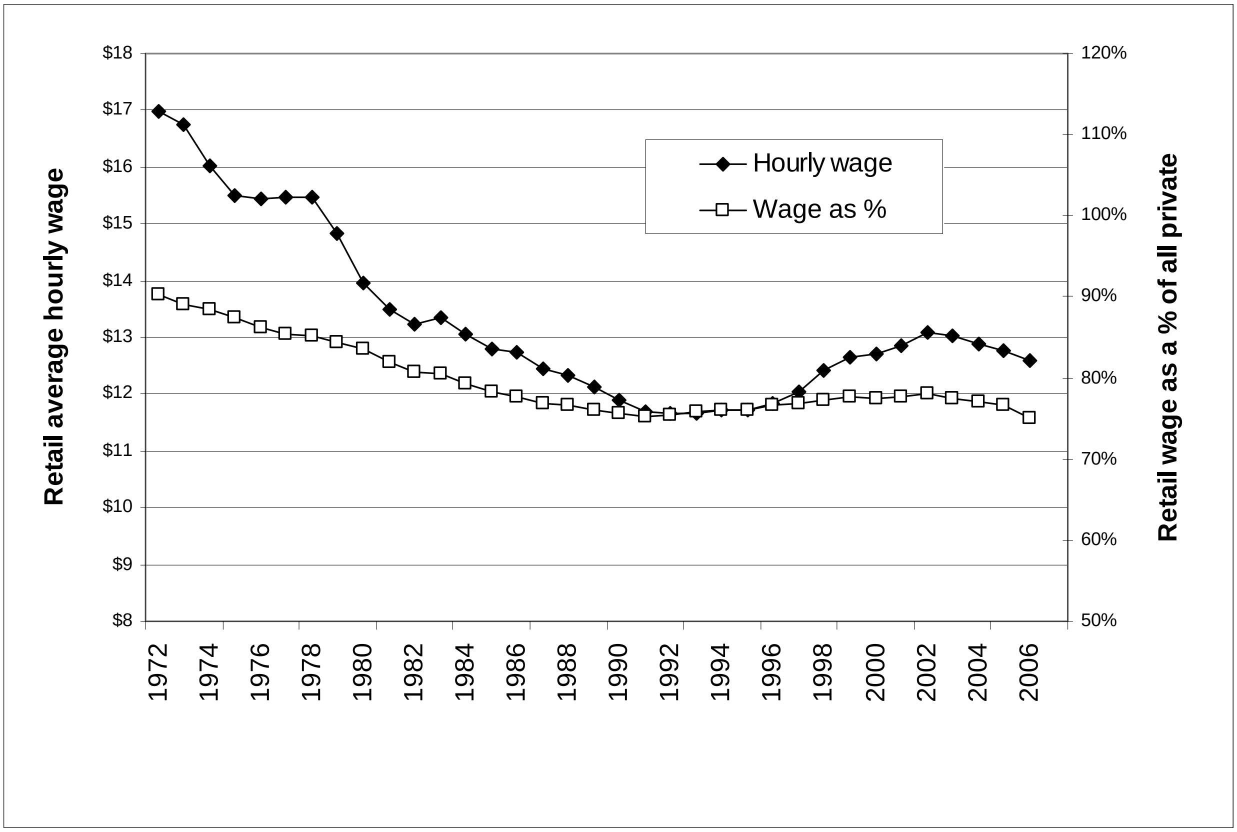
Table 2: Differences in retail labor in the United States and Mexico

	U.S.	*Mexico*
Average weekly hours in retail	28.9	50.8
Average hours as percent of average hours for all industries	84.5%	120.4%
Self-employed or unpaid as percentage of retail workforce	5.4%	55.7%
Ratio of percent self-employed or unpaid, retail/all industries	0.74	1.60
Average employment per retail establishment	14.5	2.2
Ratio of average employment per establishment, retail/all private	0.89	0.38
Average weekly hours in retail	28.9	50.8

Source: Tilly 2002. Statistics for various years 1999-2001.

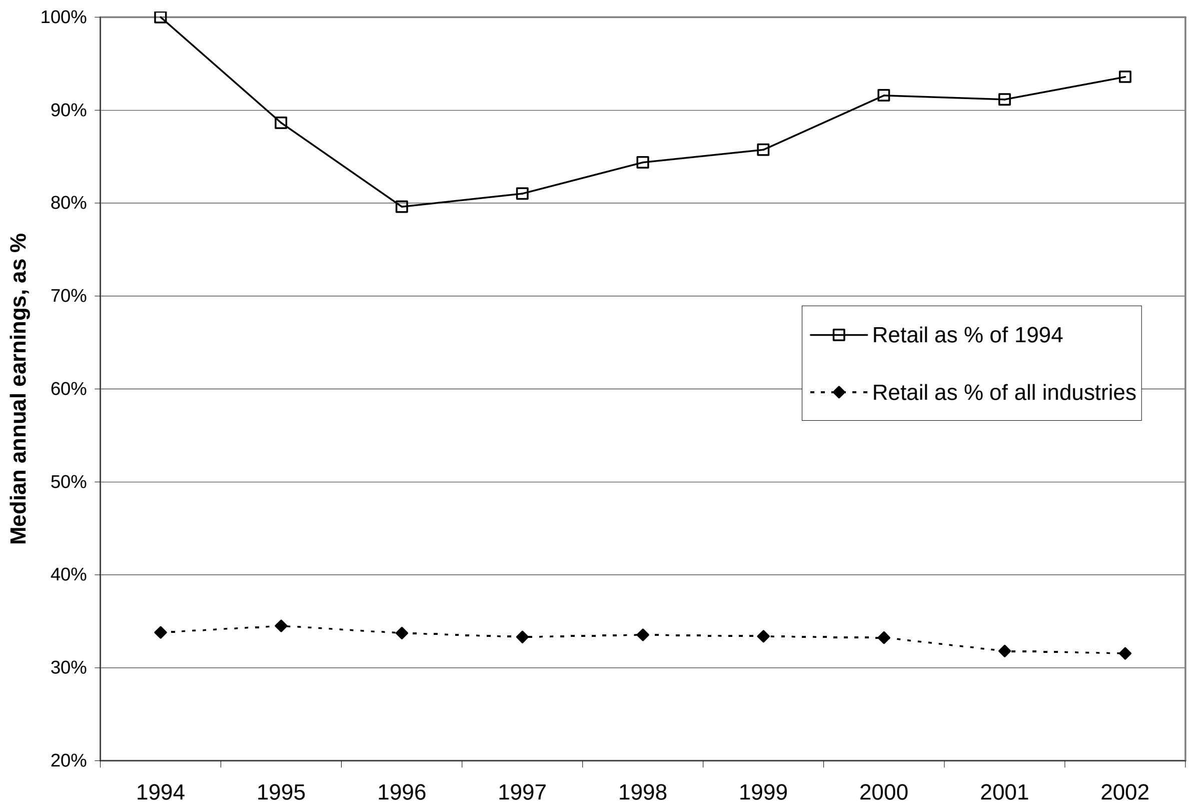
Tracing wage changes over time in the United States and Mexico (Figures 1 and 2) reveals that recent decades have not been kind to retail workers in either country. Both show a significant loss of earnings in absolute terms and relative to economy-wide wages. The major setbacks occurred in the 1970s and 1980s in the United States, and in the 1990s in Mexico (where less comprehensive data are available).

Figure 1: Median real hourly earnings of retail workers in United States and as a % of median earnings in all industries, 1972-2006



Source: U.S. Bureau of Labor Statistics, Current Employment Statistics. http://stats.bls.gov/ces/home.htm .

Figure 2: Median real annual earnings of retail workers in Mexico, as a percent of 1994 earnings and as a % of median earnings in all industries, 1994-2002



Source: Tilly and Álvarez 2006a.

Why have retail wage trends in both countries been so discouraging? In the United States, important factors were declining union coverage in the retail sector, and a falling real value of the minimum wage. But perhaps the most central cause was the spread of a low-wage, low-fringe-benefit discounting model, championed above all by Wal-Mart (Carré, Holgate, and Tilly 2006). In turn, other retailers responded to this model by seeking to cut their own costs—and labor is the main controllable cost in the retail sector. Dube, Eidlin, and Lester (2005) demonstrated a negative "Wal-Mart effect" on retail wages in urban counties three years after a Wal-Mart opened in a given county.

In Mexico, the story is quite different. In that country, Wal-Mart is a relatively high-wage retail employer, offering wages above its main competitors and comparable benefits (Tilly and Álvarez 2006b), so the growing presence of Wal-Mart was not what depressed wages. Instead, the fall in earnings was tied to an economy-wide recession and a surge in informal sector retail microenterprises (street vendors and the like)—the job of last resort for people unable to find jobs in the formal economy.

It is also important to point out that even in the United States, not all retailers responded to the low-wage discounting model by reducing their own wages and fringe benefits. Costco, a no-frills warehouse store chain very comparable to the Wal-Mart chain of Sam's Club warehouse stores, instead pays exceptionally *high* wages and fringe benefits in order to compete. According to recent reports, Costco paid its hourly workers an average of $17/hour compared to $11.52 at Sam's Club; 80 percent of Costco employees received employer-provided health insurance, as compared to 47 percent in Wal-Mart (Carré, Holgate, and Tilly 2006). Costco profits despite these pay levels by running a highly efficient operation staffed with hard-working, knowledgeable, and committed employees.

Union responses to the degradation of retail jobs in both countries have so far proven relatively ineffective. In the United States, unions have been unable to win union representation at Wal-Mart or any of the other aggressive new discount chains. Instead of developing a union organizing strategy, the United Food and Commercial Workers and the Service Employees International Union are spending $11 million per year on publicity campaigns attacking Wal-Mart. In Mexico, the large retailers such as Wal-Mart appear to almost universally have union contracts, but they are "protection contracts" that protect the company rather than the workers—in fact, in most cases workers are unaware that the union exists (Tilly and Álvarez 2006b).

Global variation in retail success and labor outcomes

As the comparison of the United States and Mexico suggests, despite common global trends, both the structure of the retail industry and outcomes for labor can differ significantly, even in neighboring countries. Wal-Mart itself can offer a useful lens for offering some generalizations about these differences across countries (Tilly 2007). On the one hand, Wal-Mart, which currently does business in fifteen countries around the world, is a single corporation with a single command structure and a core competitive strategy. On the other hand, recent research on multinationals suggests that even companies that are highly determined to apply their home-base model in other countries typically must adapt to local conditions (Ferner and Almond 2007). In general, Wal-Mart's policies and practices, and its degree of success or failure, respond to three sets of factors.

Supply. When Wal-Mart or any other retailer enters a new market, the pre-existing market structure shapes its opportunities for success Wal-Mart succeeded in Mexico by buying the largest Mexican retailer and moving rapidly to expand it, quickly consolidating its market dominance. In Germany, on the other hand, Wal-Mart was only able to acquire two relatively weak chains, and existing "hard discounters" Aldi and Lidl used their superior economies of scale and consume loyalty to drive Wal-Mart out of the market in 2006 (Christopherson 2006). Similarly, Carrefour has a leading position in Indonesia where it was the first company to build hypermarkets, but left Mexico in 2005 after being unable to expand quickly enough to match Wal-Mart. The market structure also determines which strategies may be viable. In Mexico and China, small and informal retailers who do not pay taxes and in some cases do not even have a building constitute an important part of the market; consequently, Wal-Mart's strategy in both countries has not been to offer the lowest prices (as in the United States), but rather to aim at more of a middle class market—and it is to serve this middle-class market that Wal-Mart offers better-than-average retail jobs in both countries (Lo, Wang, and Li 2006, Tilly 2007, Wang and Zhang 2006).

Demand. Yuko Aoyama and Guido Schwarz (2006, p.275) argue that because demand is so tied to local cultures and food systems, "successful retail globalization is synonymous with retail localization." In Mexico, consumers still place a great premium on freshness. In the 1990s, the average Mexican family shopped for food 11 times per week, compared to 4 times for the average U.S. family (*American Demographics* 1995, *Progressive Grocer* 1999)—in part because most families still go out to neighborhood *tortillerias* to get fresh tortillas for each mid-day meal. This emphasis on freshness keeps shopping at neighborhood stores and traditional markets that get fresh produce and meat daily, blunting the competitive power of Wal-Mart and other modern supermarkets built around economies of scale. In Korea, one interpretation of Wal-Mart's failure is that its no-frills model clashed with the high service expectations of Korean consumers (Lee 2007).

In fact, different patterns of demand mean that the E.Land conflict would be a very unlikely one in the United States. E.Land aroused the anger of its union by firing irregular workers, chiefly cashiers. The company was able to hire irregular workers as cashiers while still meeting Korean consumers' service expectations by having clerks in other parts of the store provide service. In the United States, however, consumers are accustomed to a self-service model in which clerks are scarce and typically a consumer's only contact with a worker occurs at the cash register. U.S. retailers, therefore, would be highly unlikely to hire cashiers on an irregular basis—because the cashiers are the key contact point at which shoppers evaluate a store's quality of service!

Institutions. Many institutions, such as land-use laws restricting the development of large shopping centers in France and the United Kingdom, affect competitive possibilities. But institutional differences are particularly important in structuring labor outcomes. We have already seen that Mexico's labor laws make it impractical for Mexican grocers to use part-time labor, whereas U.S. and Korean retailers depend on it. The different characteristics of unions in the United States and Mexico also play out in Wal-Mart's complete avoidance of unions in the United States, but its acceptance of union "protection contracts" in Mexico. To some extent, we can generalize about how differing labor institutions shape Wal-Mart's variable relationship with unions (Table 3). In Canada, the United States, and the United Kingdom, where union representation is not required by law and Wal-Mart confronts strong unions, the company has fiercely resisted unionization. Argentina and China end up in the same category as Mexico, where laws favor unionization but the leading retail unions are weak and compliant, and Wal-Mart has adopted "protection contracts" in all three countries. In Brazil and Germany, Wal-Mart has been reluctantly compelled to accept unions by strongly pro-union labor laws.

Table 3: International variations in Wal-Mart's relationship with unions

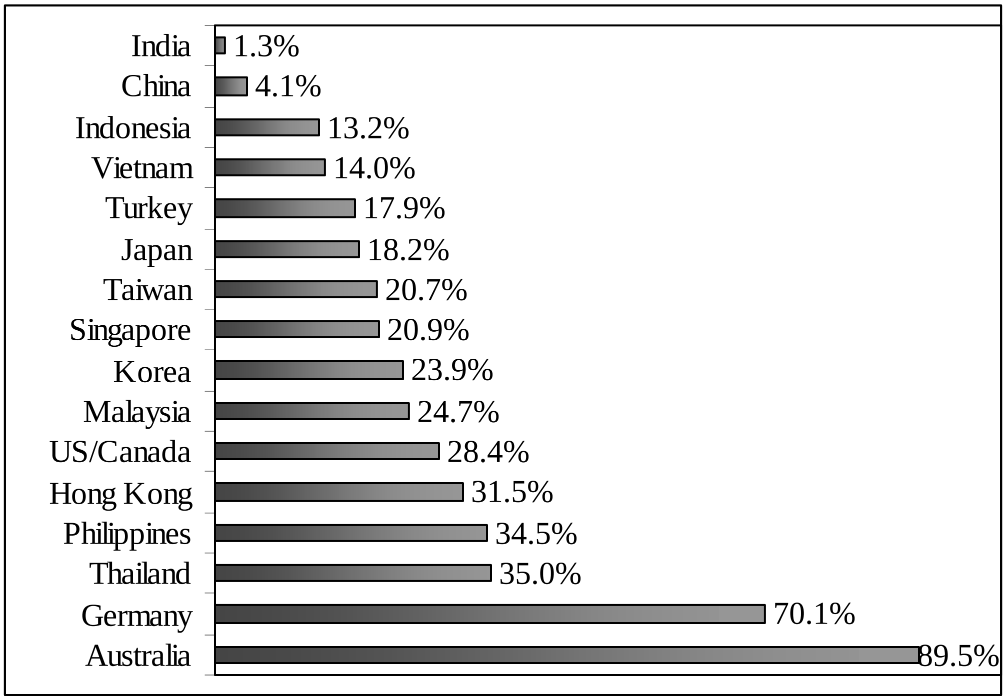
	Union contracts required or strongly encouraged by law	***Not required***
Genuine, independent unions	Brazil, Germany: *Grudging acceptance*	Canada, United States, United Kingdom: *Active resistance*
Weak, subordinate unions	Argentina, China, Mexico: *Representation via "protection contracts"*	?

Source: Tilly 2007.

What about Asia?

Asia is a huge continent with vastly varied societies and economies. Not surprisingly, then, there are widely varying retail sectors across the continent. As Figure 3 shows, the degree of retail concentration ranges from atomized India, where the top five retailers control just over 1 percent of the market, to monopolistic Australia, where the top five account for over 90 percent of sales. Korea stands somewhere in the middle, with the top five holding 24 percent of the market, only a little less than in the United States and Canada.

Figure 3: Market share of top five grocers for Asian countries, 2005 (with Germany and U.S./Canada for comparison)



Source: Planet Retail 2007.

The case of India is an interesting one. Wal-Mart recently announced plans to enter that billion-strong market through a joint venture with Indian retailer Bharti. Carrefour and Auchan (France) and Tesco (Britain) are also making plans to move into India, and Indian retailer Reliance already has 335 supermarkets in place. As India's national and state governments contemplate how much to open the retail market to global capital, 2007 saw vigorous demonstrations of small shopkeepers and their supporters *against* the spread of modern supermarket chains, and demonstrations of farmers—who see the supermarkets as important new buyers for their crops—in *favor* of the chains (Agarwal and Pokharel 2007, India Times 2007, Reuters 2007, Vorley 2007). Like farmers, consumers "are reaping a bonanza" from the new supermarkets, which offer lower prices than traditional outlets (India Times 2007). The conflict of interests is sharp.

Reflecting Asia's broader diversity is a diversity of union structures and strategies in the retail sector. Korea and Japan's retail unions are well established and robust, though enterprise-based, and are actively confronting the problem of irregular work (Sayama 2007, UNI 2006a, UNI 2004). In other Asian countries, union activism is relatively new. In Indonesia, workers at the Hero Supermarket chain, the country's largest, began organizing in 1999, after Soeharto's fall opened the way to independent unionism. Unions are now in place at Hero and Carrefour in Indonesia (International Labour Organisation 2004, UNI 2004). In Thailand, a small union recently formed at the distribution center of the Tesco Lotus supermarket chain has faced stiff opposition from management (UNI 2004, 2006b). Perhaps the biggest question mark is China.

The All-China Federation of Trade Unions has historically played a passive role subordinate to the government, but the federation surprised observers (and Wal-Mart) in 2006 by an active organizing campaign that secured union representation at all the Wal-Marts in China (Chan 2006).

Conclusions

The three major retail trends—supermarketization, globalization, and modern discounting—are making their mark all over the world. These trends bring with them implications for labor. Supermarketization brings larger enterprises and the replacement of self- and family-employment with more standard capitalist employment relations, creating both higher productivity that permits higher levels of compensation, and the potential for unionization. Globalization means that the owners and top managers of a company may be located a country or even a continent away, challenging workers to form transnational alliances to match their employers' global reach. Modern discounting brings even greater efficiencies, but in many cases (such as Wal-Mart in the United States), retailers have made low wages a key part of the discounting strategy.

Despite these commonalities, we have seen that the specific configurations of the retail market, job quality, and labor-management relations vary widely—even within the boundaries of a single global corporation like Wal-Mart. Differences in supply, demand, and institutions lead to widely differing outcomes. Although Wal-Mart offers worse jobs than other retailers in the United States, it offers better jobs in China and Mexico. Wal-Mart busts unions in the United States, accepts them reluctantly in Brazil, and embraces them in Mexico. And even in the United States, Costco, which practices the key elements of Wal-Mart's modern discounting strategy, offers high levels of compensation where Wal-Mart offers low ones. In short, the labor practices of the national and global giants that dominate retail today are malleable, and respond to changes in laws and institutions. This is cause for optimism that we can find ways to make retail jobs into better jobs all over the world.

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