A brief history of food retail

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Abstract

Purpose – The purpose of this paper is to provide a historic perspective on the supermarket industry that has changed from the small Mom and Pop stores to major supermarket chains.

Design/methodology/approach – This study is a review of secondary information from trade literature, popular new media and academic publications.

Findings – The changes in supermarkets and food stores followed the trends in how consumers have changed and developed. As consumers around the world continue to change, so will food retailers.

Research limitations/implications – The author could have included more on the development in underdeveloped countries.

Practical implications – This paper has practical implication in that to understand that food retailers must continue to follow consumer and technology changes if they want to grow and prosper. To quote Winston Churchill, “The farther backward you can look, the farther forward you are likely to see.”

Social implications – Supermarkets must be responsive to consumer changes and as consumer become more demanding for convenience so must supermarkets must continue to provide it or disappear.

Originality/value – This study is original to the extent that it brought together the different eras in supermarket. The actual changes have been well known.

Keywords History, Supermarkets, Food retailing

Paper type General review

Introduction

We are now in the twenty-first century, and many readers may ask the question of how is knowing the history of food marketing helpful to today’s contemporary food marketers. Winston Churchill once said, “Those who fail to learn from history are doomed to repeat it” and “The farther backward you can look, the farther forward you are likely to see.” Understanding the history of food retailing can give the twenty-first century food marketer insights by drawing on what was successful as well as what went wrong. The concept of a postmortem of what was done in the past is neither an indictment of how we behaved in the past nor is it a celebration on how things were better years ago. It is simply a body of knowledge that helps make us more efficient and effective today.

An issue that needs to be resolved is how far back we should go. We know that the concept of food retailing has been around for 1,000 years or more. Ancient markets and agoras have been in place since recorded time. Food was one of the most basic commodities traded or sold in these markets. While interesting, this probably provides little information in terms of helping us understand food retailing today. Although in a later section of this paper, local farmer’s markets and wet markets in developing countries will be mentioned.

When one examines the past, it can often be broken down into specific eras. But it is important to point out that there is generally not a discrete delineation between when one era ends and the other begins. In each of the eras discussed below, there were clearly times when both types of food retailing existed. It is just that one was fading and the other was blooming.

Methodology

The methodology conforms to a historical review of the development of a process. In this case, it is the development of the grocery/supermarket channel. A secondary research
process was employed using both academic, trade and Lay publications. The historic review also includes the personal observations of an academic researcher with 50 years of study and observation of the retail food industry. The author having written over 100 peer review articles mostly using experimental and survey data recognizes that this type of methodology does not comport with more traditional journal article format. However, the objective was not to introduce innovative idea and concepts but rather to provide the history to assist in the development in new ideas and concepts. Winston Churchill is purported to have said, “The farther back you can look, the farther forward you are likely to see.” This paper is to help those who are looking forward.

The history

The corner store era. For many years in the USA and Europe, food retailers tended to be small corner stores spread throughout an urban area or village. The owners knew the customers as in many cases the travel distance to the store was only a few blocks and most people walked. The shops carried very few items, which were exactly what the store clientele wanted. These stores were generally supplied by wholesalers.

The corner stores were often referred to as dry grocers because they generally did not stock fresh products such as meats, fish, baked goods and vegetables. There were separate stores that specialized in these items such as butchers, fishmongers, bakeries and green grocers to carry these products. Consumers shopped in these stores as frequently as the dry grocer because they did not have the refrigerating conveniences that people have today. Food shopping in the corner store era involved frequent shopping trips and visits to a variety of different stores.

These corner stores or general stores were the backbone of food retailing until the mid-1800s.

Chain stores initial era. Most of the corner stores were independent and unaffiliated. They bought from a wholesaler, jobber or other middleman and paid, for the most part, the asking price. One company recognized that if they affiliated or formed a “chain” of these small corner stores, they would have more bargaining power to get better prices. When there were a few corner stores in the area, the lower price chain store would be preferred. Chain grocery retailing took off around the beginning of the twentieth century, with the Great Atlantic and Pacific Tea Company (established 1859) and other small, regional players. The Wall Street Journal is claimed to have written “if things continue as they are every food store in America will be an A&P.”

Grocery stores of this era tended to be small (generally less than 1,000 square feet) and were still considered dry grocers. This category is considered as a “sub-category” because although it became a lower price alternative, the stores themselves still looked like the corner stores. Most of the changes were logistical. There was a huge operational difference. In order to give lower prices, A&P had to find ways of money-saving innovations. It developed standardized aisles and product offerings, and because it was so big, it operated its own logistics system of warehouses and self-delivery, eliminating all the various middlemen that were commonplace in the market at that time. Another innovation of A&P was its creation of private label or store brands. The company created Ann Page brands and Eight O’Clock Coffee which lasted as long as A&P. While A&P was enormous and growing, it was still not what we think of when we think of a modern supermarket[1].

Self-service chain store era. The biggest change was the self-service concept. Up to this point, clerks stood behind the counters and collected the foods that the consumers requested. However, in the early 1900s, Clarence Saunders’ Piggly Wiggly stores introduced America to self-service shopping. This made it easier for consumers to “walk the stores” and potentially pick up products they had not thought of (impulse shopping). However, the
biggest impact was not on retailing but on food processing. This began the age of branding for the food processors, since consumers now walked around the store and made their own selections. Thus, the various food manufacturing or food processing companies needed to find ways to have consumers identify their specific products, or in other words create brands. Up to the self-service era, there was really no need to involve consumers in the product choice model. Virtually, all the efforts were made convincing the small shopkeepers to buy a specific product.

Self-service did more than simply get consumer involvement in the buying process and branded food manufacturers, it went to a more traditional view of supermarkets which might be called, “pile them high and watch them fly.”

Michael Cullen is considered the father of the modern supermarket who opened King Kullen stores, the first of which was opened in 1930. The stores were in warehouses not in the center of urban areas but on the outskirts of New York City. The stores offered many of the things we see today in supermarkets like free parking (Americans had more cars and no longer needed to walk to the store). They were fun places to go and products were sold out of the boxes (piled high!). The emphasis was on volume (watch them fly!). The volume and the no frills approach resulted in even lower prices than other chain stores.

The news of success spread quickly and many chains across the country adopted the “supermarket concept”[2].

Supermarkets were now spreading around the world as the US success was being reported across Europe. In 1960, Herman Salling opened his first supermarket store Fotex, through his company Jysk Supermarket, which was a completely new type of store for Denmark. The idea behind that store was to provide both food and textiles under one roof (Dansksupermarked, 2016). Supermarkets sprung up around all of Europe.

In the UK, self-service shopping took longer to become established. Even in 1947, there were just ten self-service shops in the country (Hamlett, 2008). In 1951, ex-US Navy Sailor Patrick Galvani, son-in-law of Express Dairies chairman, made a pitch to the board to open a chain of supermarkets across the country[3]. The UK’s first supermarket under the new Premier Supermarkets brand opened in Streatham, South London, taking ten times as much per week as the average British general store of the time (Gregory, 2010). Other chains caught on, and after Galvani lost out to Tesco’s Jack Cohen in 1960 to buy the 212 Irwin’s chain, the sector underwent a large amount of consolidation, resulting in “the big four” dominant UK of today: Tesco, Asda (owned by Wal-Mart), Sainsbury’s and Morrison’s.

The contentment era. The life of the supermarket beginning in the 1950s was reasonably quiet without major changes. As populations moved out of the city centers and as consumers became more mobile, with yet more cars, supermarkets moved to the suburbs with their consumers. Basically, the same stores, maybe slightly larger, were being built in suburbia. There is little to write about supermarkets but the food manufacturers were placing more and more emphasis on branding. Numerous companies were asking for shelf space and most supermarkets offered multiple brands in the same category.

This may also be the beginning of the creation of the “slotting allowance”[4]. A slotting fee, or slotting allowance is a fee charged to manufacturers by supermarket retailers in order to have their products placed on the shelves. The fee varies greatly depending on the product, manufacturer, and market conditions. In the early 2000s, the initial slotting fee for a new product was as high as $25,000 per item in a regional cluster of stores, and this price is likely to be much higher today (Copple, 2006). Since the original slotting fees have now been incorporated into food retailers budgets, numerous other fees were created which simply added to the prices food manufacturers charged supermarkets, and therefore restricted brands that could not afford the high front end fees from supermarket shelves.
One can also presume that the sizes of supermarkets grew during this period to accommodate more shelf space to let the supermarkets collect greater fees. However, another argument for growth (besides more shelf space to collect more fees) was that as the stores moved to the suburban areas, land was cheaper and it was more efficient to build bigger stores for a growing population.

Non-traditional supermarket era. While once the low-cost alternative to the “corner stores,” supermarkets became the primary shopping site for consumers, and this may have led to complacency with respect to price. Supermarkets viewed their competition as other supermarkets. They failed to recognize that competition was coming from many different directions, and would eventually change the food retail landscape permanently.

Because supermarkets were charging slotting fees for shelf position, manufacturers were increasing the cost/price to supermarkets by as much as 50 percent. These left supermarkets vulnerable to companies that were willing to make their profits from selling the food rather than buying the food and charging fees.

One of the first and unequivocally the most successful of the new food retailers was Walmart stores which was incorporated in 1969. Walmart started primarily as a variety store which increasingly sold more and more food. Its key to success was among other things not requiring any of the fees which were demanded by traditional supermarkets. In many cases, Walmart could buy the product from food manufacturers for as much as 50 percent less than supermarkets could buy them. These stores came to be known as supercenters[5]. The supermarket industry, represented by the Food Marketing Institute, failed to recognize Walmart as a food store. After all, it did not look like a traditional supermarket, and more importantly, it sold much more than just food. To show the transient nature of the supermarket business, by the time the Food Marketing Institute finally included Walmart in its list of grocery stores, it was the number one food retailer in America. In Europe, the Carrefour supercenters which were known in Europe as “hypermarkets” were also growing.

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The Carrefour group was the first in Europe to open a hypermarket, a large supermarket and a department store under the same roof. The company opened its first hypermarket on June 15, 1963 in Paris, France.

Although Walmart and Carrefour may have caused the biggest change, there were other low-cost food businesses also developing. Warehouse stores were developed initially as “cash and carry” stores to compete on lower prices than traditional supermarkets. By the early 1980s, dominating food retailers appeared. Costco entered the market as a warehouse club where an initial fee was paid to become a member, and prices of the products were reported to be significantly lower. Walmart also entered the “club store market” with Sam's Club with virtually the same concept as Costco.

While these were very successful, not all of the discounters were successful. For example, warehouse economy outlet (WEO) was a discount, warehouse-style supermarket concept that was developed in the 1970s by A&P, and is credited with being among the first of its kind in the industry. The first WEO quickly became a successful, profitable venture. WEO featured top-selling grocery items in their original wholesale bulk packaging at greatly reduced prices. This venture failed in part because A&P decided to try to put the WEO concept into its existing stores, but most of them in the 1950s were not large enough to accommodate all of the volume necessary to make the discount concept successful.

The club store concept went beyond the USA and France. Makro is an international brand of warehouse clubs. Originally a Dutch-based chain, the first one opened in Amsterdam in 1968. In the following years, more stores opened in the Netherlands and in several other European countries.

Attracted by the prospects of being able to offer lower prices than traditional supermarkets, a German company name Aldi entered the US market in 1976. It was called a
hard discounter. These stores were basically everything that the traditional American supermarket was not. They offered little convenience such as shopping bags, and products on the floor were still in boxes with no fancy lighting or store fixtures. Aldi has become incredibly successful in the USA while being globally one of the most successful hard discounters in the world. Also, entering the US market is the hard discounter and main competitor to Aldi, Lidl. Just as with other food retail formats, when one proves successful others follow. For example, Colruyt is a chain of supermarkets, started at Lembeek near Halle, Belgium. It is competing with hard discounters such as Aldi and Lidl in Benelux countries where it is a well-established market leader.

The main distinction of the hard discounters besides having much lower prices is that they sell primarily private label or secondary brands. You will find very few national branded products in either Aldi or Lidl. They also have a very limited assortment, have not historically stressed fresh foods and they invest minimally in technology.

It is often said that if you want the cheapest brand name products such as Heinz ketchup, go to Walmart; if you want to take a chance at finding a branded ketchup at an even lower price try Sam’s Club; however, if you just want ketchup, go to Aldi.

**The consolidation era.** While overlapping with the growth of non-traditional supermarkets, traditional supermarkets found their sales growing only by roughly the US growth population rate. That is same-store sales were not growing significantly. Since most major chains at that time were publicly owned, management needed to show shareholders that the value of the stock could in fact increase, not by getting more shoppers, but by buying other supermarkets. Other growth options were much less desirable since many of the best locations were already occupied, and prices could not really be lowered because the economic model for supermarkets could not withstand the lower prices that would be needed to compete with supercenters and hard discounters.

Consolidation became the modus operandi for growth. There were thousands of independent retailers around the USA where the chain consisted of 15-20 stores. In many cases, these stores had higher profit margins than the large chains, and had a high net present value to the independent owners. A large supermarket chain looked to increase its sales revenue simply by adding the sales of the newly acquired independent chain, and hoped to increase its profit margins in the same manner.

While there were some successes in the consolidation process, in general, it failed to live up to its promise. The reasons are varied but clearly one of the reasons includes reorganizing so that the profitable independent chain acted more like the less profitable national chain. In many cases, the small independent chains were more responsive to their local customers, while the large national chains were more interested in implementing common practices within their large chain ignoring the local populations.

One should not get the impression that there were no advantages provided by consolidation. One advantage was that the larger total sales volume gave the national chains more negotiating power to the food processors/manufacturers. They were able to negotiate lower prices and higher fees. The second advantage is that the economy of scale in producing private label products for the major chains was lower costs of production via economies of scale, but also greater sales of private label because of the brand strength of the larger national chain. Today, the success of private label in any country is highly correlated to the concentration of supermarkets in that country (Stanton, 2013).

A good example of a food retailer that has successfully managed the consolidation of smaller chains is Kroger. In addition to Kroger Stores, its banners include Cala Foods,
City Markets, Copps, Dillons, FoodsCo, Fred Meyer Stores, Fry’s, King Soopers, Mariano’s Fresh Market, Metro Market, Pick ‘n Save, Quality Food Centers (a.k.a. QFC), Ralphs, Food 4 Less, and Smith’s Food and Drug. Many of these stores banners target very different consumer segments.

Non-food store era. During this time, there were stores selling some food products and they have been around for a long time. For various reasons, they started selling more and more food. One reason is that the frequency of purchase for food was often higher than the frequency of the products sold in the non-food stores. While they always sold candy, milk, coffee and soft drinks, these stores began to get into dry groceries, lunch meats as well as other deli foods. So, while the food retail industry was focused on consolidation, competing with hard discounters, and competing with supercenters, some smaller retail stores were sneaking in the back door. A wide assortment of retailers not traditionally associated with food began the slow but continuous process of adding food to their retail stores. In fact, everyone is selling food.

Convenience stores. Just as in science, nature abhors a vacuum, and the same is true for food retailing. As the supermarket moved from urban areas to large formats outside the city, convenience stores or forecourt stores filled the gap that was left from the corner store leaving. And so, the modern convenience food store was born. It was nothing like the supermarket. They were small stores not large stores; they had limited assortment not a wide variety; they were open long hours as opposed to business hours; they were usually more expensive; and focused on convenience of location as opposed to low prices out of town. Initially, convenience stores sold cigarettes, newspapers and other sundry goods. As the convenience stores began to recognize that they were in fact “convenience stores,” they focused more on food. The first convenience store is attributed to be a Southland store in Dallas, Texas in 1927.

A very successful European convenience chain is Spar. In the UK, Spar has become known primarily as a convenience store, although in Northern Ireland Spar operates using the sub-format Eurospar as well. The company also has a large presence in the Republic of Ireland where it also uses the Eurospar sub-format.

The US convenience retailing industry has roughly doubled in size over the last three decades. At year end of 1985, the store count was 90,900 stores, at year end of 1995, the store count was 101,100 stores and at year end of 2005, the store count was 140,665 stores. The US convenience store industry, with 154,195 stores across the country (as of December 31, 2015), posted $547.8 billion in total sales in 2015. The convenience retailing industry continues to be dominated by single-store operators, which account for 63.1 percent of all convenience stores (97,359 stores in total). Convenience stores account for 34.2 percent of retail outlets in the USA (NACS, 2016). In the beginning, convenience stores were associated with gas stations, and for the most part, they still are today. However, they have become major players in food retailing. One major change that occurred over the years of convenience stores’ existence is greater emphasis on prepared foods. While these prepared foods were often simple such as chili, soups, sandwiches and salads, they were often perfect for the busy-time starved worker who wanted to stop and pick up dinner for the night without the inconvenience of going to a supermarket or cooking from scratch.

Pharmacies. Another “gap filler” is the pharmacy. While this is predominantly still a US food retailer format, globally one can see pharmacies selling more food at a much slower pace and much less volume than in the USA. Yet in the USA, this has become a slightly different version of the convenience store. Much like convenience stores, pharmacies use to sell candy, beverages and various smaller food items. Now it is common in pharmacies across the USA to sell fresh produce and frozen foods as well as dry groceries. Much like the
convenience stores, they are looking to provide “fill in” food shopping rather than the weekly grocery shopping.

Dollar stores. Another surprise competitor in the food industry is a class of stores referred to as dollar stores. Globally, they take on the name of the country’s currency – for example, 100 Yen stores, Ein-Euro-Laden stores or Todo, a 1€ store. These stores started out as variety stores selling some food but it was usually close out brands or products that were perfectly good but mislabeled, etc. In Ireland, a chain was founded in 1990 by Charlie O’Loughlin when he opened his first variety store, “PoundCity” on Moore Street in Dublin. More stores were opened throughout Ireland. In 2001, Euro General was set up and “PoundCity” was renamed “Euro 2” due to the introduction of the Euro as currency in 2002.

Dollar stores were different from supermarkets, pharmacies and convenience stores in that there was a sense of a “treasure hunt” because you never knew what food products might be available for sale in the stores. Consumers who visited a dollar store and saw a bargain had to buy the item at that time as it might never be back in the store again.

Today, food represents an important part of dollars store sales, but these stores do not try to emulate supermarkets. They generally have all brand products, still do not carry all the categories, but have included frozen and refrigerated foods and limited assortment.

Prepared food era. While the retail industry was undergoing a dramatic change by having so many new retail formats offering food, consumers around the world have been changing as well. While the purpose of this paper is not to outline how the world’s consumers have changed, one single fact has had the greatest influence on food retailers: global time famine. Consumers since the 1970s have found that they have less and less time as they are spending more time working, especially among females. Making the family meal has become more of a drudgery than ever before. The result is that consumers have relied on food retailers to make their meals simpler and faster. All of the retail outlets began to focus more on prepared foods. Food retailers were not only selling shelf stable prepared foods, but were also offering various ready-to-cook and ready-to-eat food in the deli department.

And so entered yet another player to the food retail industry. Sales in restaurants have increased every year, as consumers prefer someone else to prepare their food. Not only have various sit-down restaurant formats increased, but the restaurant prepared take-home food has had dramatic increases as well.

In the USA, more than half of all of the food sold is in various restaurant formats including sit down and take home. While some people argue that these are not really retail food stores like supermarkets or convenience stores, etc., they clearly are in competition to fill consumers’ bellies.

Targeting era. Since the very beginning of the development of supermarkets, there was very little targeting, or the development of a unique selling proposition which was a major portion of branded companies’ activities. It was said that the target market for most supermarkets was anyone with “a penny and a pulse.” However, as competition continued to become more intense both from within the supermarket industry and from all of the non-traditional stores selling food, the concept of targeting a store to a specific target market became more prominent.

The food markets had always had the low-price supplier in both Walmart for branded products and Aldi for secondary brands or private label; however, the new supermarkets were now targeting well-defined groups of consumers looking for common benefits and attributes. For example, in the USA, consumers who were more health and nutrition conscious would shop at stores like Whole Foods. Hispanics were targeted with very specific stores often characterized by very large fresh produce sections such as Presidente. Foodies, those who enjoy cooking and more exotic foods, found chains like Wegmans
perfect for their needs. Asian shoppers could go to an H Mart to find many original Asian products that were not available in traditional American supermarkets.

It has become more and more difficult for a traditional supermarket which was the pride of the 1950s and 1960s to attract new customers when they basically have nothing special to offer other than potentially a desirable location.

**Online era.** Technology has become a key and central to supermarket activities. The list of in-store and logistical technologies that make all retailer channels of distribution more efficient and effective are being developed. However, all of the various food retail channels are capable of developing new ways of satisfying the customer. Already in the USA, “no checkout stores” are being developed using RFID and other methods to allow consumers to simply pick up their products and walk out the door. New alternative methods of supply chain capabilities are appearing every day. But these technologies do not give any single retail channel an advantage as any format could adopt this technology.

However, a new channel of distribution has emerged out of the online technology explosion. The most obvious example is food companies giving consumers the ability to order foods online in your own home and either have them delivered or pick them up at either the store or a designated pickup location. The two alternatives that exist are adoption of this method by traditional grocery stores or by separate businesses that simply deliver groceries to the home such as Amazon or Peapod.

There is also an incredible shrinking retail channel in terms of market share for Europe’s traditional hypermarkets, supermarkets, as their sales could plummet to less than 50 percent by 2025 as consumers flock to value smaller stores and online (Bain, 2016).

Peapod, a company owned by a traditional supermarket chain Ahold (a Dutch company), offers home delivery. What makes the company really special is that you can actually order based on billboards placed in various areas with electronic codes to simply scan the desired items and then they will appear at your home. Tesco has a “click and collect” which allows you to order online and then go to a specific location (not necessarily a supermarket) to pick up your items. Tesco is expanding its concept of home delivery to go wherever the shopper is. Tesco is planning to build a national network of online-only stores called “Dark Stores” as it looks to cash in on the surge in popularity of internet grocery shopping. Auchan has drive-through markets, and Marche has its own home delivery trucks.

Supermarkets are quick to figure out how to get their traditional products in the consumer’s home more conveniently through online shopping, while other totally new food retail channels of distribution are being developed. These online businesses, generally subscription services, send everything that is needed to make a single meal. At whatever frequency the consumer requests, a box containing all of the ingredients to make a meal is delivered to the house at the appointed time. While there are a number of these online subscription services available in the USA and Europe, Blue Apron is a leader in the USA.

There are also various online subscription services that send specific types of ingredients directly to the home. In Europe, one can get a box of healthy, nutritious fresh foods sent from Panier Malin with any desired frequency. Graze delivers a box of nutritious snacks on a regular basis. The choices for what food can be delivered is appearing to be endless.

Ironically, as the traditional food retailing industry becomes more technologically advanced, the resurgence of farmer’s markets and street markets are similarly increasing. One of the developing consumer segments is consumers who believe that local, fresh food is tastier, is fresher and thus healthier.

**Conclusion**
The future of the retail industry in one regard is clear: there will be food retail stores. The nature of these retail stores is likely to be significantly different than the corner store of
the urban areas in the 1930s and 1940s. The industry has been dramatically matching the changes in the consumer population to the advancement of technology.

The astute food retailing student must also realize that the street markets and wet markets still not only exist but are a major type of food retail outlet. In underdeveloped and even some developing countries, wet markets are the primary retail food sources. In countries like India, modern food retailing is just developing. The developed markets of the USA and Europe are not the only way to look at food retailing.

Supermarkets in the future will probably do what supermarkets have done in the past. Change!

There is also no doubt that as the retail industry changes, there will again the voids to fill in just like in the past some business will jump in and fill the vacuum.

Notes
1. Once considered the greatest chain store in the USA, it has sadly disappeared. Ironically, the chain was created out of innovation and change, failed to change as society demanded something different from its grocery stores. The American icon ceased supermarket operations in November 2015, after 156 years in business. A number of reasons have been posited for its failure, but it frankly just failed to change.

2. Both Queen Elizabeth II and Nikita Khrushchev both asked to visit an American supermarket on their visits to the USA. Reported in the History Channel “the History of the Supermarket, TV series. Including actual footage of both the Queen and Khrushchev visiting American supermarkets.”

3. The company was founded by George Barham in 1864 as the “Express County Milk Supply Company,” (https://en.wikipedia.org/wiki/Express_Dairies#cite_note-1) named after the fact that they only used express trains to get their milk to London.

4. There is still some question as to the genesis of slotting allowances.

5. The supercenters continue to sell the general merchandise as well as food and truly represented one-stop shopping.

References

NACS (2016).

Web reference

Further reading


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