

Changing the food system: **with or without large retailers?**

EXECUTIVE SUMMARY

iles de paix



humundi
SOS FAIM

The food system that feeds us has been built on a centralized model dominated by a few major retailers. Although low prices and abundance made its strength, the social and ecological damage it outsources is becoming increasingly difficult to ignore. Calls for change crystallize around two poles: reforming existing mass retail from within or breaking away to establish an alternative ecosystem. Based on a series of accounts, interviews, and a literature review, we have modeled the rationalities that shape this debate to gain a deeper understanding. Our analysis ultimately reveals a third approach: reconfiguring the system by the coexistence and hybridization of different models.

Rise and Crisis of Mass Retail

For centuries in Europe, food retail relied on a dense network of **family-run shops** where people bought often and in small quantities, since refrigeration was not available. In the 19th century, demographic and technological shifts fostered new retail formats to emerge – from chain stores cutting costs by centralizing warehouses and standardizing offer, to consumer co-operatives.

Inspired by the Rochdale model (England, 1844), **cooperatives** offered an alternative that gave the working-class more control over the economy: collective ownership, democratic governance, and capped returns on capital. They extended their action beyond the store by organizing supply chains, cultural and union spaces, and mutual-aid systems, eventually becoming major players in industrial regions.

THE POSTWAR RETAIL REVOLUTION

Across the Atlantic, in the United States, self-service (1916) ushered in the era of mass marketing, where product display becomes central. Then, in 1930, the first modern **supermarket** – combining self-service, large floor space, parking, and rapid inventory turnover – launched the era of low prices through a “low margins, high volumes” formula. Before World War II, however, these formats remained marginal elsewhere.

In Europe, it was only in postwar that what economist Philippe Moati calls a “**retail revolution**” truly took shape. Far from inevitable, it resulted from the initiative of some retail entrepreneurs, rising purchasing power, and – above all – public action that, as with agricultural land consolidation, saw it as a lever for modernization. Roads, parking, suburban planning, equipment subsidies, and new sanitary and technical standards laid thus its foundations.

Although this shift met resistance, the supermarket (and later the hypermarket) gradually became the infrastructure of a **Fordist compromise** linking mass consumption to mass produc-

tion. Family shops declined, while co-operatives followed diverging paths: consolidation into large groups at the cost of a weakened political project (e.g., Italy), or a downward spiral ending in disappearance (e.g., Belgium).

PRESENT CHALLENGES

Today, large-scale retail’s dominance plays out on three fronts:

- Economic:** it controls market access, aggregates volume, and strengthens its bargaining power through transnational purchasing alliances.
- Cultural:** it shapes shopping routines and normalizes price-based trade-offs, supported by granular consumer data.
- Political:** these resources make it an unavoidable interlocutor able to influence agendas and offer “turnkey” solutions to policymakers.

This power is built in part on shifting costs and risks onto labor (upstream and in-store), as well as on shopping environments that make less healthy and less sustainable options the easiest.

Since the 2000s, however, signs of systemic **crisis** have multiplied. Store expansion is hitting saturation, price wars are intensifying, and specialist retailers and e-commerce are encroaching market shares. The generalist supermarket is losing customers both “from below” and “from above” as expectations and purchasing power become increasingly diverse. Showing strong adaptive capacities, retailers are reinventing themselves (proximity, digitalization, sustainability), but the historical model appears to be running out of steam. A collapse is unlikely, yet the trajectory is uncertain.

Since the 2000s, signs of systemic crisis have multiplied and the trajectory of the historical mass-retail model now appears uncertain.

With or without Large-Scale Retail? Two Poles in the Debate

CHANGE THROUGH LARGE-SCALE RETAIL

The “self-reform” perspective bets on a transition of the dominant system “from within.” Aware of climate, geopolitical, and competitive risks threatening their viability, retailers would have an interest in making eco-efficiency a core performance driver. Leveraging digital tools, they can improve results and reputation through more efficient transport, better-calibrated assortments, and reduced losses.

In this view, large-scale retail takes on the role of a system “integrator”, using its power to direct demand towards more sustainable choices and to transmit consumption signals upstream through specifications and contractual terms that reward more responsible actors. The State is invited to play a “soft” guidance role rather than impose constraints; civil society stimulates progress through benchmarking and litigation; alternative initiatives serve as prototypes that can be adapted for mass distribution.

CHANGING AGAINST LARGE-SCALE RETAIL

The “rupture” perspective argues that the heart of the problem lies in the power relations structuring the dominant system. The commodification of food, the concentration of actors, and the public policies that have supported them, produce structural injustice. From this standpoint, collaborating with large-scale retailers will have the effect of neutralizing change.

A transformative horizon therefore combines two levels. At the micro level, the task is to strengthen a **counter-system** made up of cooperatives, short supply chains, and food commons capable of offering a real alternative. At the macro level, it means

refounding **public action** around investments in collective infrastructure and binding rules that curb concentration, margins, and unfair practices.

THE BLIND SPOTS OF SELF-REFORM AND RUPTURE

Developed from the work of Frank W. Geels and now one of the key tools when studying change, the **Multi-Level Perspective (MLP)** – which views transitions as rearrangements among regimes, niches, and landscape, distinguishing several possible pathways – helps situate these two models within a broader analytical frame.

Self-reform resembles a “**transformation**” pathway driven by dominant actors under landscape pressure, but it largely sidelines territorial, social, and democratic dimensions, and seems to underestimate the likelihood that rebound effects will cancel out efficiency gains. Rupture aligns rather with a “**substitution**” or a “**de-alignment/re-alignment**” pathway, but it overestimates both the current robustness of niches and the State’s capacity to act as an architect when it itself is an assemblage of components influenced by the regime.

Building Robustness through Reconfiguration

This double mismatch points to the need to explore another path, starting from a simple observation: day to day, large-scale retail still structures access to food, while alternatives must contend with its infrastructures, norms, and routines. Rather than choosing between idealism and fatalism, the challenge becomes using what exists as a lever while setting safeguards.

In MLP terms, this corresponds to a “**reconfiguration**” pathway in which coexistence and hybridization among different models can open spaces for change within a weakened regime. This pluralism and cross-fertilization can widen household options, diversify agricultural outlets, and increase system robustness. These interfaces are arenas of controversy, where issues long taken for granted (margins, quality, working conditions) can become negotiable. Midway between short and long supply chains, “**intermediate food systems**” (*systèmes alimentaires du milieu*, SyAM) – which envision partnerships among heterogeneous actors at the scale of a foodshed – offer a fitting framework for such approaches.

Mechanisms such as food policy councils and food belts, or the « Manger Demain » unit in Wallonia, can serve as conductors of these arenas and help prevent them from becoming mere window dressing. Nevertheless, without enforceable **safeguards**, hybridization can devolve into co-optation, adjustments can be pushed upstream or onto shelf prices, and asymmetries can reproduce a dynamic where the best-resourced actors set the pace and the agenda. The criteria proposed by Agroecology in Action, based on the 13 agroecology principles of the HLPE, provide a useful foundation here – but they only matter if they are secured. Hence the need for a “**partner State**”: neither a mere market facilitator nor a single master planner, but a guarantor of stable arrangements and a steward of key commons (public health, land, infrastructure, data).

HYBRID ACTION PATHWAYS

On this basis, three pieces for a re-configuration puzzle of food distribution in Belgium can be envisioned.

- Upstream, **producer cooperatives** – such as Farm For Good, Biomilk, FairBel, En direct de mon Élevage – enable farmers to structure supply, pool risks and investments, and negotiate contract terms on a less unequal footing.
- On the retail side, **participatory supermarkets**, which adopt the codes of conventional formats while reversing ownership, labor, and governance relations, as well as **bio-local supermarkets**, which compete in the sustainable-products segment, offer significant outlets on more favorable terms.
- At the macro-institutional level, proposals for a “**Social Security for Food**” (*Sécurité sociale de l'alimentation*) and a “**Consumption Pact**” (*Pacte à la consommation*) open an opportunity for convergence between different ideological worlds. Whether through an allowance paired with democratic accreditation, or through dedicated vouchers financed via a bonus–malus-type tax scheme, these approaches make the conditions for market-access negotiable. A gradual rollout building on existing instruments such as meal vouchers could create both the demand and the rules that allow SyAM to absorb growing volumes without diluting their criteria.

Conclusion

To change the food system, should we bet on self-reform by large retailers or on a break with the alternative ecosystem? This study has shown us that, in reality, it is probably coexistence and hybridization at the regional level that will offer realistic levers capable of meeting today’s challenges. This form of reconfiguration now appears to be the most promising and spontaneous path for consumers, yet the most neglected by those involved in proposing alternatives.

In this complex context, greater dialogue between the proponents of different models is needed, driven by governments and supported by regional food governance structures.



The Phosphore Collection is a collaboration between the NGOs Autre Terre, Humundi and Iles de Paix.

Author

Naïke Alberti.

Coordination

Olivier Genard et Anaïs Henry.

Steering

Naïke Alberti, Pierre Coopman, François Grenade, Laura Deflandre, Jonas Jaccard, Anaïs Henry, Olivier Genard, Magali Verstraeten.

Production

<https://www.marmelade.be>

Photo

Cover 1: Oleksii S on Unsplash

Cover 4: Gabrielle Ribeiro on Unsplash

All rights reserved

Printed on recycled paper.

Responsible

Marie Wuestenberghs,
rue du marché 37 - 4500 Huy

With the support of

Wallonia-Brussels Federation



FÉDÉRATION
WALLONIE-BRUXELLES

And the Directorate-general for
Development Cooperation and
Humanitarian Aid (DGD)



Belgique
partenaire du développement

The Phosphore collection is a series of studies launched by the SIA collective (Humundi, Iles de Paix, Autre Terre) on the challenges of food systems. It is characterised by the analysis of contested issues that drive the decision-making arenas of food systems. It seeks to understand the reading grids that underlie political discourses, the competing arguments and their scientific validity. Each issue is intended to provide an overview of a debate, and aims to equip readers in the controversy.

iles de paix



humundi
SOS FAIM