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Docente responsável: Prof. Dr. Alvaro A. Comin (548616) <alvcomin@usp.br>

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Aulas 11 & 12

- **11. Os donos do mercado: grandes cadeias de varejo (17 e 18 de maio)**
- Senauer, B. and Reardon, T. (2011) “The Global Spread of Modern Food Retailing”. In: Petrovic, M., Senauer, B., Hamilton, G. G. *The Market Makers* [Cap. 10: pp. 271-290).
- Bonacich, E. and Hamilton, G. G. (2011) “Global Logistics, Global Labor”. In: Petrovic, M., Senauer, B., Hamilton, G. G. *The Market Makers*. [Cap. 7: 211-230).
- **12. Cadeias de valor e relações centro-periferia (07 e 08 de junho)**
- Gary Gereffi (1994) “The Organization of Buyer-Driven Global Commodity Chains: How U.S. Retailers Shape Overseas Production Networks”. In: Gereffi, G. & Korzeniewicz, M. *Commodity Chains and Global Capitalism*. Praeger (Cap. 5: pp. 95-122).
- Illes, Paulo & Timóteo, Gabrielle L. S. & Fiorucci, Elaine S. (2008) “Tráfico de Pessoas para fins de exploração do trabalho na cidade de São Paulo”. *Cadernos Pagu*, n.31, p.199-217.
- Margaret May Chin (2005) *Sewing Women: Immigrants and the New York City Garment Industry*. Columbia University Press. (Cap. 2)
- Angela Hale & Jane Wills (2008) *Threads of Labour: Garment Industry Supply Chains From the Workers' Perspective*. Wiley, Cap 2.

Cadeias de comércio: um ponto cego na literatura (eles não leram o Braudel?)

“The revolution in transportation and communications technology has permitted manufacturers and retailers alike to establish international production and trade networks that cover vast geographical distances. **While considerable attention has been given to the involvement of industrial capital in international contracting, the key role played by commercial capital** (Le. , large retailers and brand-named companies that buy but don't make the goods they sell) **in the expansion of manufactured exports from developing countries has been relatively ignored**”. (Gereffi, p. 95)

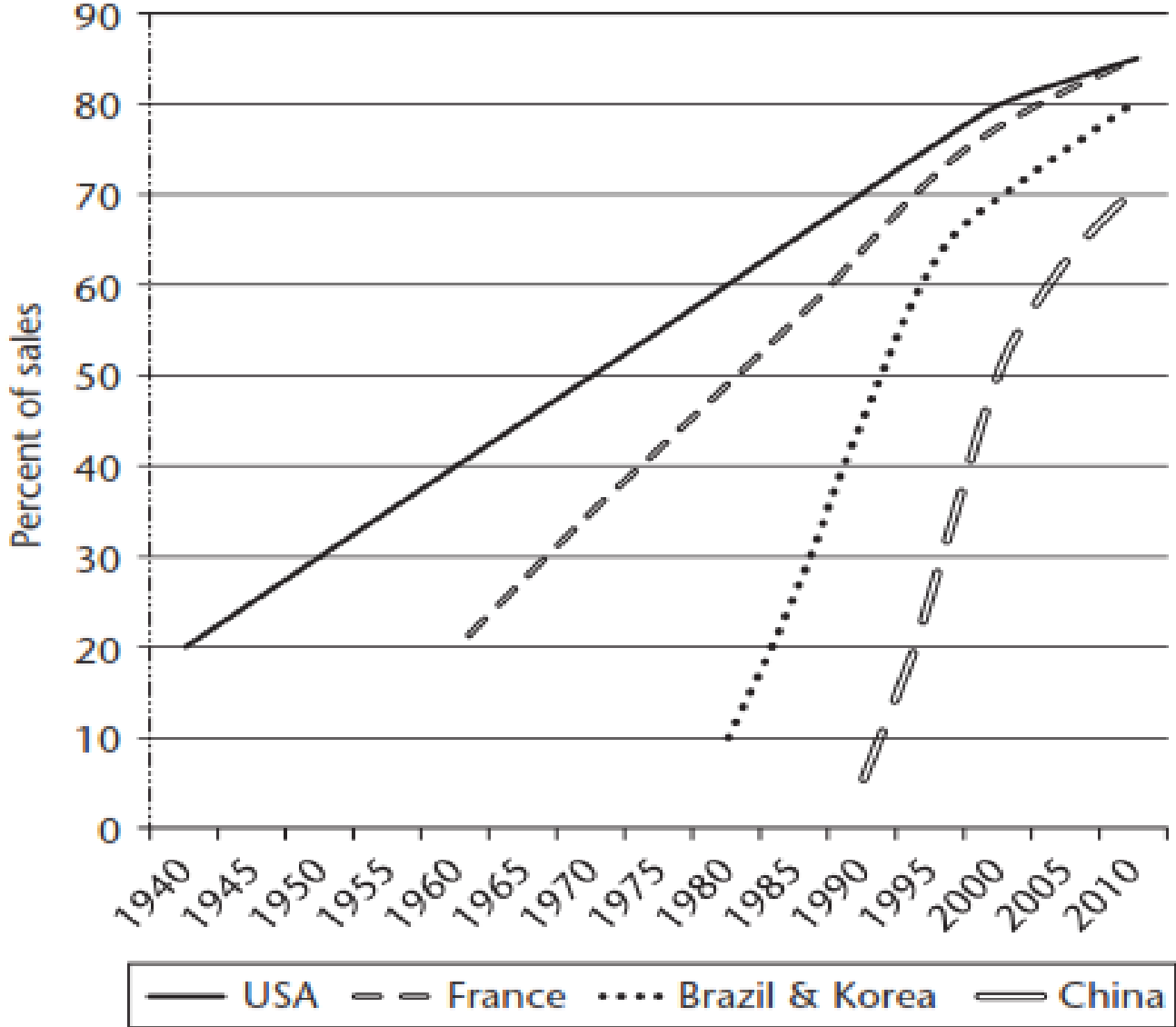
“Criando” mercados

“In a phenomenally short period (since the middle 1990s), modern food retailing has spread around the world to countries in Latin America, Asia, Eastern Europe, and even parts of Africa. **The global expansion of modern food retailing is an excellent example of the concept of market making.** Food retailers are remaking their consumer and supplier markets”.
(Senauer & Reardon; p. 271)

The *American Way of Life*... agora ao alcance de todos - e com descontos incríveis!

People in Brazil, China, South Africa, and dozens of other countries who used to shop only at open-air **public markets, street vendors, and small family-operated stores** are going to **modern supermarkets** and supercenters as well as other modern retail formats (such as chains of hard discounts, neighborhood stores, and convenience stores). They are no longer waited on personally by the shopkeeper or vendor, but, **like Americans and Western Europeans, they are walking up and down the aisle making their own selections before checking out.** (Senauer & Reardon; p. 271)

A ascensão meteórica dos Supermercados



(Senauer & Reardon; p. 280)

Figure 10.1. Supermarket share of the retail food market, 1940–2010

Convergência entre produção e no comércio

Supermarkets and the food manufacturing industry grew together in a symbiotic relationship. Supermarket chains developed their price advantage over traditional retailers by buying in bulk and thus exploiting **economies of scale**. The natural partner from whom to buy in bulk was a large-scale food manufacturer. In the same way, to establish mass brand presence, be priced competitively, and develop **economies of scope** with a diversity of products, **large food manufacturers found supermarket chains to be natural partners**, with clear advantages over **mom-and-pop shops** in all but the manufacturer's degree of bargaining power with the client. This symbiosis was as true of large food manufacturers and supermarkets in the USA in the 1940s as it is in developing countries today. Jointly, **supermarkets and large food manufacturers transformed the consumer food market.** (Senauer & Reardon; p. 272)

As grandes redes de varejo: ou os donos do mercado

“There was an imbalance of bargaining power between the food retailers and the major food manufactures, which favored the latter in the USA, as large food manufacturers had innovated with national brands in the late 1800s and early 1900s when supermarkets were in their infancy. Therefore, **well-established food manufacturers had considerable bargaining power until well into the late twentieth century, when the pendulum of market power swung toward the retailers**”. (p. Senauer & Reardon; 273)

Concentração empresarial no atacado e no varejo.

By the end of the 1990s the major food retailers had largely remade the supply chain in the USA and Western Europe. With their **control of the flow of information**, they now had the upper hand in their relationship with food manufacturers and other suppliers. The shift in power from food manufacturers to retailers in the USA (following a trend that had occurred a decade or more before in the UK) was also affected by the **waves of consolidation** that occurred in US food retailing and the growth of “**private-label**” or “**storebrand**” products, which competed directly with the national brands. (Senauer & Reardon; p. 274)

Adeus ao pequeno produtor?

- They [big retailers] want to deal with only a small number of large, reliable suppliers and not a multitude of small fragmented producers. **The retailers are imposing stringent quality standards, and are beginning to impose safety standards. Procurement contracts and “preferred” suppliers are replacing traditional wholesale markets** already in an advanced way for processed products, and in initial phases for fresh products. **Sourcing is becoming regional or even global.** The use of modern logistics practices is driving costs from the system, as was done in the United States and Europe. (p. 284)
- these higher private standards are beginning to affect produce growers and form a challenge, **especially for small farmers.** These **private standards are becoming more important in agro-food systems than the public grades and food safety standards** established by governments and international agreements (Reardon et al. 1999). **Meeting a retailer’s requirements for fresh produce may necessitate major investments in packing and cooling facilities, cold storage and shipment, and trucking capacity.** (p. 285)
- **Suppliers typically do not receive payment from supermarkets immediately upon delivery,** which is what small farmers are used to in traditional marketing channels. (Senauer & Reardon; p. 288)

Terceirizações e intermediações:

o “livre mercado”, a concentração de capitais e a redução da concorrência.

“If a supplier does not meet the retailer’s expectation, they can be “delisted,” losing a major customer. Xincheng Foods acts as the primary produce wholesaler for the two largest food retail chains in China. Xincheng **leased some 1,000** hectares (about 2,500 acres) of prime farm land, hired farm workers, invested in tractors, drip irrigation, and greenhouses to supply high-quality produce to the supermarkets and to the export market, Xincheng also contracted with some **4,500 small farmers** for additional production” (Hu et al. 2004; Reardon and Timmer 2007). (Senauer & Reardon; p. 286)

GDFERRC/2015



International
Labour
Organization

Employment relationships in retail commerce and their impact on decent work and competitiveness



Sectoral
Policies
Department

- The retail sector has been the biggest loser of jobs for the last two years in a row in the US, as thousands of stores closed as shoppers moved online. It remains one of the US's largest employers, providing 15.8m jobs, but the reordering of the retail landscape is having a profound impact on the nature of its workforce.
- Between November 2016 and November 2017, the sector fired 129,000 women (the largest loss for any industrial sector for either sex) while men gained 109,000 positions, according to an analysis by the Institute for Women's Policy Research (IWPR). In the whole labour force women gained 985,000 jobs over the year, while men gained 1.08m jobs.
- Major retailers shut shops across the US last year. A record 6,700 stores shut in 2017, according to Fung Global Retail & Technology, a retail thinktank. Macy's alone closed 68 stores and shed 10,000 jobs. Drugstore chain Walgreens closed 600 locations

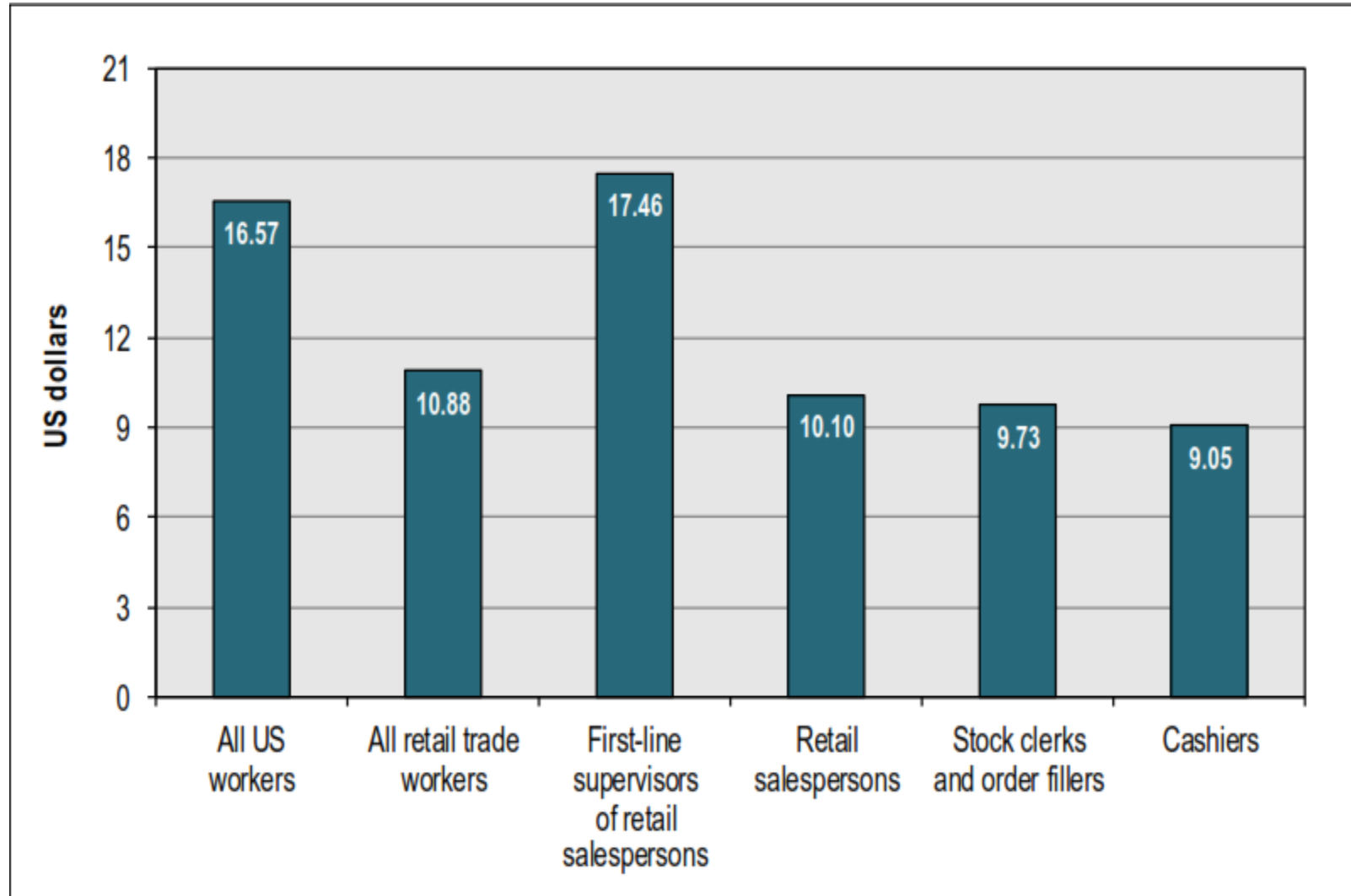
The US retail industry is hemorrhaging jobs - and it's hitting women hardest

Dominic Rushe in New York

Sat 13 Jan 2018 12:00 GMT

- New jobs are being created in shipping, handling, back office and warehousing but traditional retail is being hollowed out with the loss of checkout and sales assistant jobs. “There are still jobs being created in retail but they are jobs with different skill sets,” (...). But despite those gains “there is real job loss going on and we may not see those jobs coming back. In many cases these jobs are being lost in places where retailers are the largest employers in the area.”
- “Women lost jobs in manufacturing first. They had the easiest jobs to ship abroad – clothing, textiles – and the men had the jobs that did eventually get shipped abroad but were more difficult to move, like cars, with big transportation costs.” (...) The Amazon effect too is hurting women more than men. Alongside store closures in non-durable goods – food and clothing for example – retailers are experimenting with ways to remove checkout positions, jobs where women dominate.

Dominic Rushe, *The Guardian*, 13/01/2018.

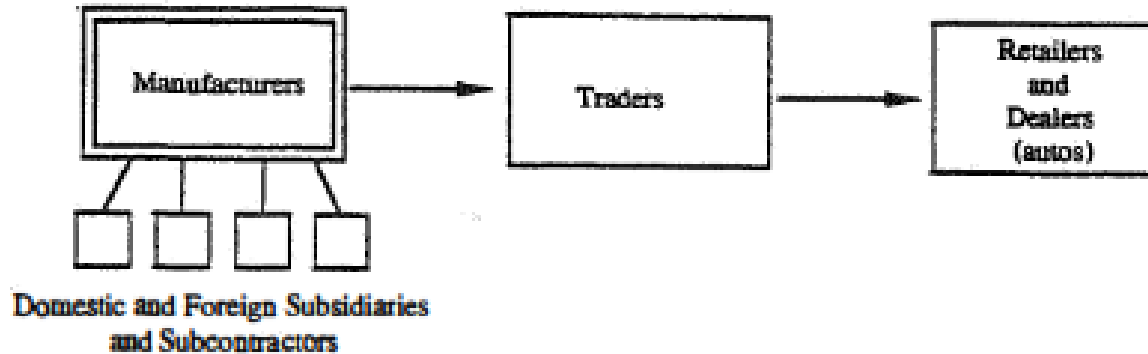


“Employment relationships in retail commerce and their impact on decent work and competitiveness”. OIT (Geneva, 22–23 April 2015).

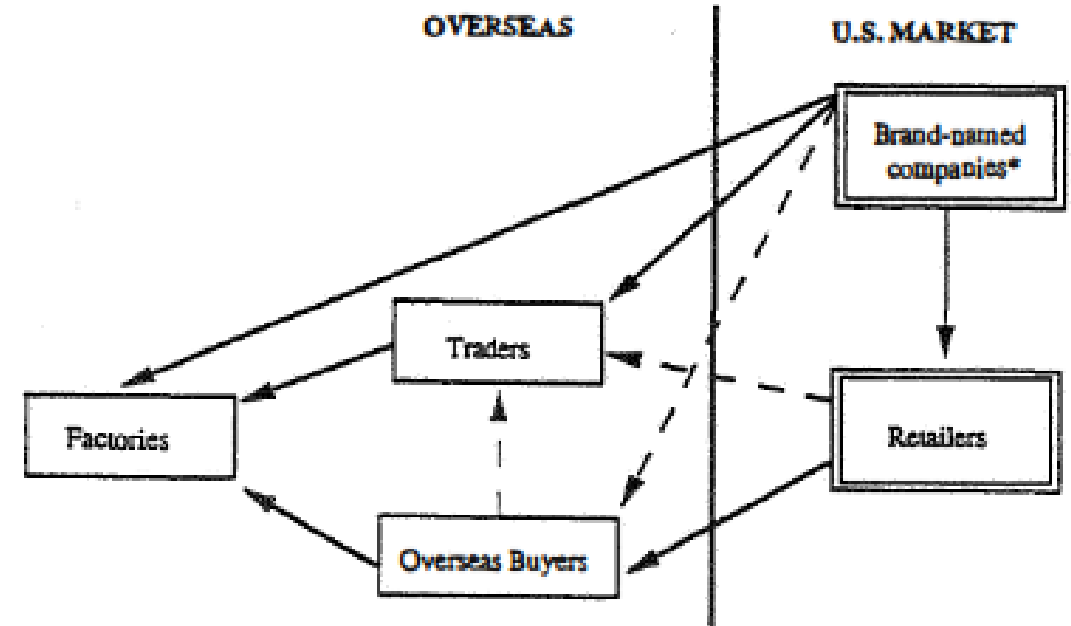
Cadeias comandadas por produtores X cadeias comandadas por varejistas e marcas

Figure 5.1
The Organization of Producer-Driven and Buyer-Driven Global Commodity Chains

1) **Producer-driven Commodity Chains**
(Industries such as automobiles, computers, aircraft, and electrical machinery)



2) **Buyer-driven Commodity Chains**
(Industries such as garments, footwear, toys, and housewares)



*These design-oriented, national brand companies, such as Nike, Reebok, Liz Claiborne, and Mattel Toys, typically own no factories. Some, like The Gap and The Limited, have their own retail outlets that only sell private label products.

Note: Solid arrows are primary relationships; dashed arrows are secondary relationships.

(Gereffi, p. 99)

“One of the main characteristics of firms that fit the buyer-driven model, including athletic footwear companies like Nike, Reebok, and L.A. Gear and fashion-oriented clothing companies like The Limited, The Gap, and Liz Claiborne, is that frequently these businesses do not own any production facilities. They are not "manufacturers" because they have no factories. Rather, these companies are "merchandisers" that design and/or market, but do not make the branded products they sell”. (Gereffi, p. 99)

The main job of the core company in buyer-driven commodity chains is to manage these production and trade networks and make sure all the pieces of the business come together as an **integrated whole**. Profits in buyer-driven chains thus derive not from scale economies and technological advances as in producer driven chains, but rather from unique combinations of high-value research, design, sales, marketing, and financial services that allow the buyers and branded merchandisers to act as strategic brokers in linking overseas factories and traders with evolving product niches in their main consumer markets.

(Gereffi, p. 99)