

Food and Power: Addressing Monopolization in America's Food System

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This is an updated version of this report.

September 9th, 2021 - An earlier version of this report claimed that three out of four chicken farmers live below the poverty line. This figure is misleading and outdated and has been removed. This figure came from a 2001 study that found three out of four chicken farmers *whose sole source of income* was chicken farming lived below the poverty line. Today, most poultry households have off-farm income and a higher median income than the median U.S. household.

September 21st, 2021 – Market share figures for poultry, beef, pork, groceries, and global pesticides and herbicides were updated to reflect more current data.

Table of Contents

Introduction	2
Documenting Corporate Monopoly in Agriculture	2
Meat Processing	3
Chicken	3
Beef	3
Pork	4
Major Players	4
Milk and Dairy	5
Major Players	6
Farm Inputs	6
Major Players	7
Farm Equipment	8
Major Players	8
Grain Processing and Commodities Trading	8
Major Players	9
Groceries	9
Major Players	9
Food Processors	10
Major Players	10
Cafeteria Operators	11
Major Players	11
Solutions	12
Illusion of Choice	16

Introduction

Over the last forty years, economies of scale in agriculture have made it possible for most Americans to spend far less of their income on food than did previous generations.¹ Yet over the same period, the American food supply chain—from the seeds farmers plant² to the peanut butter in our neighborhood grocery stores³—has become concentrated in the hands of a shrinking number of giant multinational corporations.

This concentrated power has many negative consequences, particularly for farmers, farm workers, and for rural communities that depend on agriculture to drive their economies. For example, because of spreading agribusiness monopoly, the prices farmers pay for inputs such as seed and fertilizer continue to rise rapidly. At the same time, growing concentration among meat processors, grain traders, food processors, and retailers is responsible for driving down the prices farmers and farm workers receive for their labor. Largely because of these factors, a farm crisis is building across America on a scale not seen since the 1980s.

Monopoly also affects the quality of our food and agriculture's environmental footprint, making it a concern for both food producers and consumers, both in rural and urban areas. This brief documents the degree of concentration found in different agriculture-related sectors of the economy and lays out solutions for policymakers.

Documenting Corporate Monopoly in Agriculture

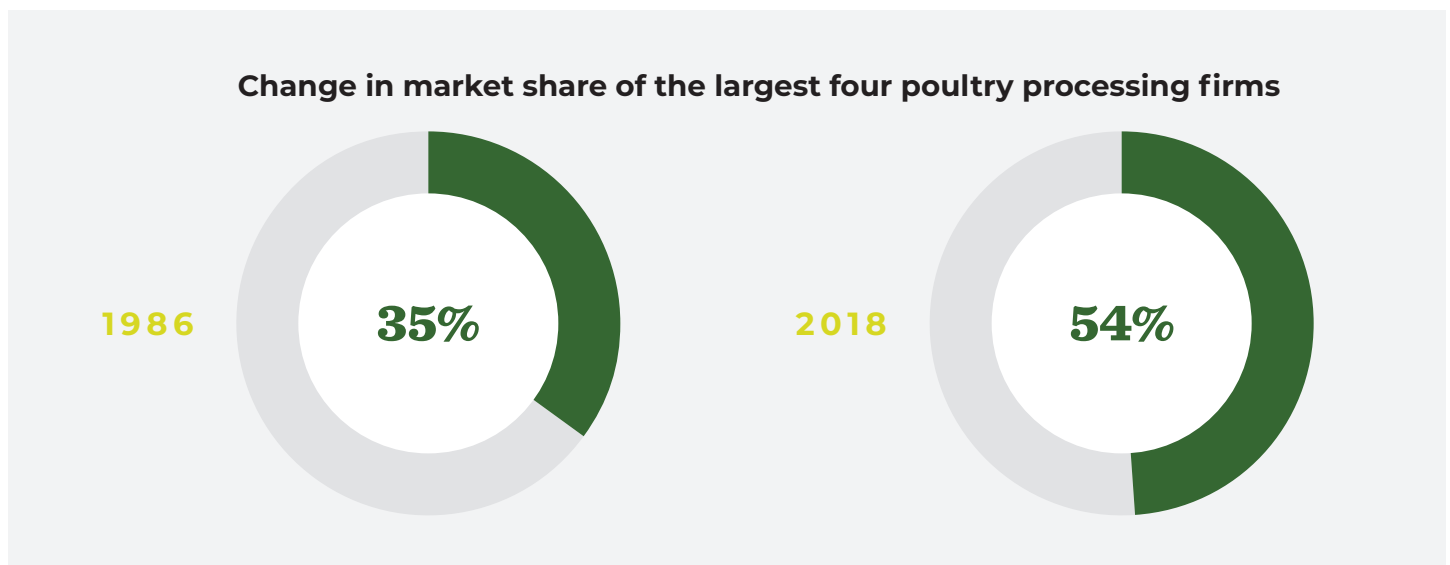
According to the USDA, agriculture and related industries contributed \$992 billion to U.S. GDP in 2015,⁴ or 5.5 percent. Farm products contributed more than \$135 billion—about 1 percent of GDP—while direct on-farm work accounted for about 2.6 million jobs, or 1.3 percent of U.S. employment. Overall, employment in agriculture, food, and related industries supports 19 million jobs.

Nearly one in five rural counties depend on agriculture as their primary income source.⁵ In Iowa, up to about 30 percent of the state's economy is tied directly to agriculture and related industries.⁶

Below, we break down how major sub-sectors of the agriculture industry are structured, provide data where available on levels of concentration, and describe the major monopolists that exert control in each market. It's important to remember that regional levels of concentration are often much more severe than national figures suggest.

Meat Processing

CHICKEN. Nine out of ten⁷ of the nearly 9 billion chickens⁸ raised annually in the U.S. are grown through “contract farming.” Under this system, poultry processors enter into contracts with farmers with specific terms, including what chicks, bird food, and medicines farmers must use and the price farmers receive once the birds are ready to be processed. Poultry processors have been known to engage in punitive behavior if farmers complain about their contracts or treatment by processors.⁹ The Small Business Administration Inspector General determined that the processing monopolies’ control is so extensive that farmers no longer qualify as independent businesses.¹⁰ Half of chicken farmers work in regions dominated by only one or two processing monopolies,¹¹ leaving them with little, if any, bargaining power for better contracts or growing terms. Over half of all broilers are raised in Georgia, Arkansas, Alabama, North Carolina, and Mississippi.¹²

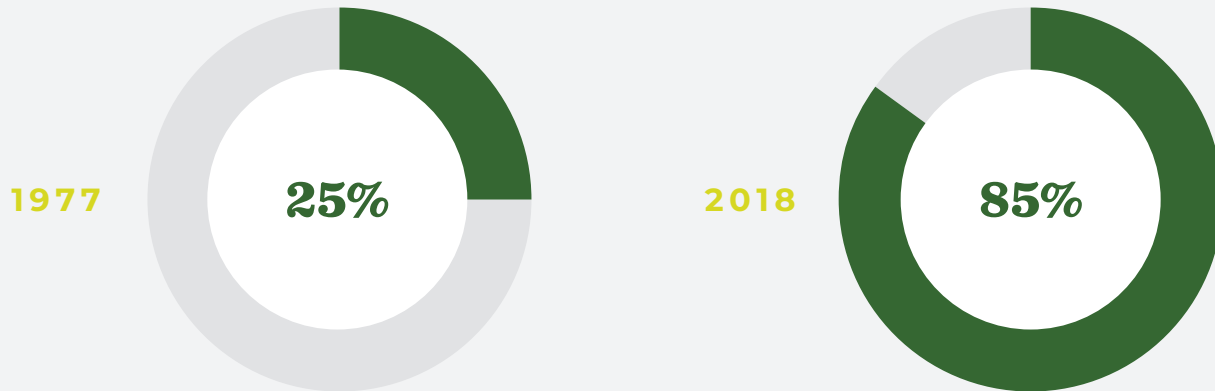


13

BEEF. The cattle industry is the single largest segment of American agriculture by value, and roughly one-third of all farms in the US raise beef cattle.¹⁴ As recently as the 1980s, the beef industry was a model of open, competitive markets. Independent ranchers bred and raised their own cattle, then sold them to independent feedlots, which fattened the cows and sold them to independent slaughterhouses. At each stage of the process, stakeholders could fetch a fair price in competitive auctions. But beginning in the 1980s, a few large slaughterhouse corporations began to consolidate their hold on all stages of the industry. Just in that decade, the number of cattle-feeding operations in the largest 13 cattle states dropped by 40 percent.¹⁵ Since 1980, an average of nearly 17,000 cattle ranchers have gone out of business every year.¹⁶ Texas, Nebraska, Kansas, California, and Oklahoma raise 38 percent of all cattle in the US,¹⁷ with Texas alone raising 13 percent.

Today, in many regions of the country, ranchers report finding as few as two buyers in a market,¹⁸ and increasingly these buyers do not compete against one another. One result of this consolidation is that the price ranchers receive continues to fall, even though the price consumers pay for beef is rising¹⁹ and beef packers are making record margins.²⁰

Change in market share of the largest four beef packing firms



21

PORK. In 1993, 87 percent of U.S. hogs were sold into competitive markets,²² but today, that figure is less than seven percent.²³ By 2001, more than 8 in 10 hogs were controlled by packer conglomerates through long-term contracts with farmers or direct ownership.²⁴ Since the mid-1990s, 70 percent of U.S. hog farmers have gone out of business,²⁵ due primarily to a decline in small farms and a rise in large concentrated feeding operations, also known as CAFOs. These CAFOs are often environmental disasters, diminishing air quality and polluting drinking water in surrounding communities. In the second largest hog producing state, North Carolina, these CAFOs are disproportionately clustered in low-income communities of color.²⁶

Change in market share of the largest four hog processing firms



27

MAJOR PLAYERS

JBS S.A. Based in Brazil, JBS S.A. is the world's largest meat packing company,²⁸ earning more than \$43 billion in revenue in 2017.²⁹ In 2007, JBS entered the U.S. market by acquiring Swift & Co., the third largest beef and pork processor at the time.³⁰ Since then, JBS has acquired Smithfield's beef business,³¹ Cargill's pork business,³² and America's second largest poultry processor,³³ Pilgrim's Pride.³⁴ JBS was found to have given over \$100 million in bribes over the last 25 years to more than 1,800 Brazilian politicians, which the corporation admits helped them secure financing from Brazil's state-owned bank in order to take over the U.S. beef market.³⁵ In 2018, USDA found JBS had ripped off U.S. cattle producers at three separate

slaughter facilities by shorting them on payments for their cattle and, although the abuses were extensive, settled the claims for only a \$50,000 penalty.³⁶ In 2017, JBS was caught exporting rotten meat worldwide.³⁷ JBS spent \$408,000 on federal lobbying in 2018.³⁸

TYSON FOODS. Arkansas-based Tyson Foods is the world's second largest meat packer,³⁹ after JBS S.A., and America's largest poultry corporation, generating \$40 billion in sales in 2018.⁴⁰ In the last two decades, Tyson has acquired dozens of smaller firms; in 2001, the Department of Justice approved its purchase of IBP, the then largest beef packer and number two pork processor in the U.S. for \$3.2 billion.⁴¹ Tyson has been implicated in numerous scandals in recent years, including limiting breaks to the extent that employees at processing plants were forced to wear diapers. The corporation also faces a class-action lawsuit that alleges Tyson and other poultry corporations engaged in a long-term price-fixing scheme that stole the equivalent of \$330 a year from the average family through inflated pricing.⁴² Tyson spent \$1.1 million on federal lobbying in 2018.⁴³

SMITHFIELD. A subsidiary of Chinese food processing conglomerate WH Group, Smithfield is the largest producer of pork in the world, slaughtering 1 in every 4 hogs raised in the United States.⁴⁴ Smithfield pioneered vertically integrated contract farming in the pork industry, expanding the use of CAFOs and putting small hog farmers out of business. Between 1990 and 2005 alone, Smithfield sales increased tenfold.⁴⁵ In 2013, Chinese food processing conglomerate WH Group purchased Smithfield for nearly \$5 billion,⁴⁶ the largest-ever Chinese acquisition of a US company at the time. WH Group posted \$22.3 billion in revenue in 2017.⁴⁷

FOOD CHAIN LABOR

In many rural communities, large meat processing plants are one of the only employers and exert this power to suppress unionization, lower or even steal wages, and force employees to work faster in unsafe environments. The Food Chain Workers Alliance reports that 65 percent of meatpacking and food processing workers have been injured on the job. Almost 60 percent of slaughterhouse workers are people of color and in 2015 nearly 30 percent were born outside the United States. Many are undocumented, making this workforce particularly vulnerable, less mobile, and more likely to experience workplace harassment.

Meanwhile, consolidated, large-scale corporate growers increasingly outsource farm labor management to contractors. These contractors act as intermediaries between farmworkers and growers, and thus provide loopholes that enable large-scale growers to avoid providing basic employee health and safety protections. More than 50 percent of agricultural workers earn a sub-minimum—below poverty—wage.

48 49 50 51 52 53

Milk and Dairy

Independent dairy farmers are in a state of crisis. In 1970, nearly 650,000 dairy farms operated in the U.S.; today roughly 40,000 remain. Since 2014, the price farmers receive for milk has fallen by 40 percent,⁵⁴ below the average farm's break-even point, as a result of oversupply and decreased demand for milk products, paired with significant discrepancies in market power within the dairy industry. For the past two decades, about 4,600 dairy farms have closed each year,⁵⁵ and that rate is accelerating. Wisconsin, one of the largest milk-producing states, has lost over 40 percent of its dairy farms since 2004 at a rate of nearly two per day in 2018 alone.⁵⁶ Like most farmers, dairy families feel pressure to lower prices from large consolidated buyers. Milk producers historically organized into co-ops to counterbalance concentrated power among buyers, but today, the largest co-ops, such as Dairy Farmers of America and Land O' Lakes, prey off of small-scale producers they're supposed to protect and strike arrangements with massive milk processors, like Dean Foods, that result in additional wealth transfers from farmers to their own executives.⁵⁷

MAJOR PLAYERS

DAIRY FARMERS OF AMERICA. Based in Kansas City, Dairy Farmers of America is a vertically-integrated milk co-operative with \$14 billion in annual revenue.⁵⁸ DFA handles 30 percent of the national raw milk supply with a far higher share in many regions,⁵⁹ leaving many dairy farmers without ways to get their milk to market without accepting DFA's terms. DFA also has vested interests across the entire dairy supply chain, owning or working closely with milk processors and marketers. These entities make more money when they pay DFA farmers less for their milk, creating a clear conflict of interest. In 2012, farmers in the Southeast received a \$140 million settlement after a class-action lawsuit alleged that DFA and Dean Foods colluded to lower prices for dairy farmers.⁶⁰ In 2014, DFA paid \$50 million to around 10,000 dairy farmers to settle a class-action lawsuit that alleged that DFA and its marketing arm, Dairy Marketing Services LLC, had conspired to monopolize the raw milk market in the Northeast.⁶¹ And in the Southeast, DFA has refused to allow dairy farmers to sell to the co-op to address regional supply shortages and to force grocery stores to import milk from the group's members in the Midwest instead.⁶² DFA spent \$1.1 million on federal lobbying in 2018.⁶³

DEAN FOODS. Based in Dallas, Texas, Dean Foods is the largest milk processor in the U.S., controlling roughly 30 percent of the market for dairy products and selling its products under dozens of different brand names.⁶⁴ The corporation, which posted \$7.8 billion in revenue in 2017,⁶⁵ also has a licensing agreement and joint partnership with Land O' Lakes, the 3rd largest U.S. dairy co-op. Dean spent \$530,000 on lobbying in 2018.⁶⁶

Farm Inputs

Today, most farmers must purchase seeds, pesticides, and herbicides from a handful of giant agribusinesses. For the past two decades, increased consolidation has coincided with the prices of farm inputs increasing faster than the prices farmers receive for their crops. Seeds are often designed to terminate—or, to fail to germinate—after one harvest, forcing farmers to purchase new seeds each season. Consolidated corporations also gain control over producers through seed and chemical product pairings that push farmers into a “pesticide treadmill,” in which they are dependent on both a corporation's evolving seeds and chemical inputs to produce a healthy crop.⁶⁷ This combined seed and chemical regime also increases farmers' costs of production, with USDA data showing that the per-acre cost of soybean and corn seed spiked dramatically between 1995 and 2014, by 351 percent and 321 percent, respectively.⁶⁸ Corn and soy yields have increased,⁶⁹ but at roughly the same rate yields had been increasing since the 1960s.⁷⁰

Change in market share of the largest four US corn seed firms



Change in market share of the largest four US soybean seed firms



72

Change in market share of the largest four global herbicide and pesticide firms



73

MAJOR PLAYERS

BAYER. German drug and chemical manufacturing conglomerate Bayer purchased St. Louis-based Monsanto, one of the world's largest seed and agrichemical corporations, for \$62 billion.⁷⁴ Monsanto has patented traits found in 80 percent of US corn and over 90 percent of US soybeans and has acquired more than sixty independent seed companies since the late 1980s.⁷⁵ Bayer's annual revenue was over \$44 billion in 2018.⁷⁶ In 2018, Bayer and Monsanto together spent \$13.4 million on federal lobbying.⁷⁷

DOWDUPONT. Headquartered in Midland, Michigan, DowDupont was formed in 2017 after the two largest U.S. chemical manufacturers combined in a \$130 billion merger.⁷⁸ In the previous ten years, the two corporations had acquired over 40 seed and agrichemical companies.⁷⁹ The conglomerate is now splitting into three corporations focused on agriculture, materials science, and specialty products, respectively, but this split will have little impact on their dominance in seeds and agrichemicals. DowDupont spent \$11.6 million on federal lobbying in 2018.⁸⁰ DowDupont's new agricultural division is called Corteva Agriscience.

SYNGENTA. Headquartered in Switzerland and owned by ChemChina, a Chinese state-owned chemical company, Syngenta is the largest manufacturer of agrichemicals in the world. In 2017, Syngenta sold nearly \$9 billion worth of pesticides alone.⁸¹ Syngenta spent \$1.6 million on federal lobbying in 2018.⁸²

BASF. German-based BASF, which brought in more than \$71 billion in annual revenue in 2018,⁸³ is the world's largest chemical company and produces a range of agricultural inputs. Bayer will \$9 billion worth of assets to BASF as a part of its Monsanto acquisition.⁸⁴ This includes Bayer's Liberty herbicide business, as well as various seed lines. BASF spent \$1.4 million on federal lobbying in 2018.⁸⁵

Farm Equipment

Today, two corporations manufacture nearly half of all tractors and other essential farm machinery in the US.⁸⁶ As farm equipment makers have grown more consolidated, they have found novel ways to extract additional wealth from farmers, including by exploiting copyright law to forbid farmers from editing tractor software, which increasingly touches every aspect of modern farm equipment. In many cases, farmers can't change engine settings, can't retrofit old equipment with new features, and can't modify their tractors to meet new environmental standards without going through the manufacturer. This not only increases farmers' costs, but also wastes critical time while farmers wait for repairs to be completed. Equipment repair is an important revenue stream for large manufacturers. They have spent millions lobbying against state-level "Right to Repair" initiatives in order to preserve this monopoly.⁸⁷

MAJOR PLAYERS

DEERE & COMPANY. More commonly known as John Deere, this Moline, Illinois-based corporation produces 32 percent of all agricultural and construction-related machinery and maintains a monopoly over its equipment repair.⁸⁸ In 2018, John Deere posted \$37.4 billion in annual revenue.⁸⁹ John Deere has vigorously opposed "Right to Repair" efforts in a number of states, going so far as to argue that farmers don't in fact own the equipment they purchase, but rather receive a "license to operate the vehicle," to maintain their monopoly on the repair market.⁹⁰ John Deere spent \$1.6 million on federal lobbying in 2018.⁹¹

Grain Processing and Commodities Trading

Just four corporations, Cargill, Archer-Daniels Midland, Bunge, and Louis Dreyfus, control close to 90 percent of the global grain trading business.⁹² Vertical integration is common, with farmers relying on the same corporation to purchase seeds and inputs, process raw materials, and manufacture products like animal feed and corn syrup. Environmental and human rights groups frequently criticize these corporations for failing to crack down on deforestation and enslavement in their supply chain, especially for controversial commodities such as soy, palm oil, and cocoa.

These four giants also have extensive trading operations on Wall Street and the Chicago Mercantile Exchange which they use to buy and sell grain futures. The original purpose of these financial instruments was to mitigate the risk of bad weather and crop failures to farmers and food processors; today, traders use them to speculate. By joining in this speculation, these corporations pull in unearned income while driving up costs to consumers. Their reach extends far beyond grains, as they trade in virtually all international food commodities. During the 2000s, commodities traders made over \$250 billion in profits.⁹³

MAJOR PLAYERS

CARGILL. Based in Minnetonka, Minnesota, Cargill is the largest privately held company in the US, with revenue of nearly \$115 billion in 2018.⁹⁴ “Middleman to the world,” Cargill is known as the world’s biggest food trading firm; its food processing and shipping network spans 70 countries⁹⁵ with a charter of 300 cargo ships,⁹⁶ handling roughly 180 billion tons of cargo a year. It is also a leading producer of animal feed, corn derivatives, ethanol, vegetable oils, and meat. As CEO David MacLennan said upon the recent acquisition of a Cedar Rapids-based animal feed producer, “We’re always in acquisition mode, there’s never a year in Cargill in which we don’t have an acquisition.” Cargill spent \$1.2 million on federal lobbying in 2018.⁹⁷

ADM. Archer Daniels Midland (ADM) runs 270 manufacturing facilities worldwide and serves over 170 countries, bringing in \$62 billion in net sales.⁹⁸ The corporation has been implicated in several price-fixing cases over the years, including colluding to increase the price of lysine (a common component of animal feed) in the 1990s. In early 2018, ADM was in advanced talks to acquire competitor Bunge (incorporated in Bermuda, headquartered in New York, with an annual revenue of \$42 billion). The agreement broke down over antitrust concerns.⁹⁹ ADM spent \$2.2 million on federal lobbying in 2018.¹⁰⁰ Bunge spent \$360,000.¹⁰¹

LOUIS DREYFUS. Based in the Netherlands, this family-owned corporation controls about 10 percent of the world’s agricultural trade flow,¹⁰² making them the third-largest food trader in the world. Louis Dreyfus made \$55.4 billion in revenue last year¹⁰³ and spent \$110,000 on federal lobbying.¹⁰⁴

Groceries

Grocery stores, like the rest of the agriculture and food sector, have becoming increasingly consolidated in recent decades, with Amazon’s recent acquisition of Whole Foods being the latest example. As recently as 1997, Americans bought 21 percent of their groceries from the then-four largest retailers.¹⁰⁵ By 2019, the top four chains sold 43 percent of all groceries,¹⁰⁶ with Walmart alone commanding a quarter of the market.¹⁰⁷ Such consolidation gives large grocery conglomerates the power to apply pressure far down the supply chain, which often lands, at the end of the day, on farmers. For instance, in 1990 ranchers received 59 cents of each dollar spent on beef while retailers received 33 cents;¹⁰⁸ today those figures are 38 cents and 51 cents, respectively.¹⁰⁹ Grocery consolidation also puts smaller grocers out of business; competition from large national chains is the most commonly cited challenge facing rural grocery stores.¹¹⁰ As consolidation has accelerated, United Food and Commercial Workers membership, the largest grocery union, has dropped by nearly 10 percent since the early 2000s, to about 1.2 million.¹¹¹ Concentrated grocery chains have also divested from low-income urban areas and communities of color, leaving corporations like Dollar General and Dollar Tree to prey upon “food deserts” and offer low-priced shelf-stable and packaged foods,¹¹² some of which cost more per ounce than similar products at a grocery store and exacerbate health and economic disparities.

MAJOR PLAYERS

WALMART. Walmart went from selling no groceries in 1990 to the largest US food retailer in 2000, a position it retains today. Walmart’s devastating drain on local retailers has been well reported.¹¹³ On average, communities lose on net 150 retail jobs after a Walmart opens.¹¹⁴ In 37 metro areas, Walmart sells half of all groceries,¹¹⁵ and in many small towns Walmart is the only retailer for miles. The corporation extracts local tax advantages and subsidies (to the tune of \$213 million since 1992¹¹⁶). Its annual global revenue topped \$500 billion dollars in 2018.¹¹⁷ Walmart spent \$6 million on lobbying in 2018.¹¹⁸

AMAZON. Just as Walmart rapidly rose from a dominant general retailer to leading grocer, Amazon's recent entry into the grocery space poses an existential threat to the industry as it is currently organized. Amazon purchased Whole Foods in 2017 and recently announced plans to open additional grocery stores under a different brand. Amazon's e-commerce and logistics dominance has sent shockwaves through the rest of the grocery industry, prompting investments in grocery delivery and defensive mergers, such as natural food distributor UNFI's recent acquisition of wholesaler, Supervalu. The head of New York supermarket Fairway has said that "competing against Amazon is like competing against the government or a military commissary."¹¹⁹ Amazon spent \$14.4 million on federal lobbying in 2018.¹²⁰

KROGER. Headquartered in Cincinnati, Ohio, Kroger is the second-largest food retailer after Walmart and the largest supermarket chain in the country,¹²¹ owning brands including Harris Teeter, Fred Meyer, King Soopers, and QFC. Kroger also owns several dozen processing facilities, including dairies, bakeries, and meat processors to support its private label brands. Kroger posted annual revenue of \$121 billion in 2018.¹²²

AHOLD-DELHAIZE. Headquartered in the Netherlands, Ahold-Delhaize's U.S. brands earned the company more than \$55 billion in revenue in 2018.¹²³ It owns supermarkets including Food Lion, Giant, Stop & Shop, Hannaford, and the grocery delivery service Peapod.

Food Processors

In recent years, processed food manufacturers have merged to exert monopoly power over a range of different food markets. To name just a handful of examples, Unilever and Kraft Heinz sell over 80 percent of mayonnaise,¹²⁴ Kraft Heinz sells 60 percent of all ketchup, PepsiCo sells nearly 60 percent of all chips,¹²⁵ McCormick sells almost half of all spices,¹²⁶ and the list goes on. Large manufacturers contract with equally large farms, cutting smaller producers out of the market. These corporations sometimes have contract farming relationships similar to the meat industry. For instance, Heinz has vertically integrated into tomato seed production and contracts growers to raise tomatoes for ketchup using Heinz seeds.¹²⁷ And these massive conglomerates have so much control over national market access that new food startups face one of two choices: limit your growth to "niche" retail, or get acquired to get onto supermarket shelves. Big Food corporations also limit competition by locking smaller firms out of grocery stores using slotting fees, or "bonuses" that food processors offer grocers to claim shelf space and national distribution. And if an independent company does manage to get into the grocery store, leading food corporations often have special privileges to decide where their competitors sit on the shelves.

^{128 129}

MAJOR PLAYERS

NESTLE. Nestle is the world's largest food and beverage corporation, with over 2000 brands and \$91.9 billion in sales in 2018.¹³⁰ The Swiss multinational corporation operates in 190 countries and houses dominant international brands including Nescafe, Gerber, Purina pet foods, Dreyer's ice cream, and several

CORPORATE DETERMINANTS OF HEALTH

In addition to controlling the marketplace, Big Food has a demonstrated interest in profit over public health, as corporations heavily advertise addictive processed products loaded with sugar, salt, and fats, while simultaneously funding nutrition research that downplays the health outcomes of these ingredients. For instance, the soda lobby has long advocated that officials focus on exercise, rather than sugar consumption, as a solution to childhood obesity. Corporations' influence over our diets has become so severe that public health scholars developed a concept to describe their power called the "corporate determinants of health."

candy brands like KitKat and Toll House.¹³¹ Nestle has come under fire for price-fixing,¹³² violating water rights in times of drought,¹³³ and aggressively marketing baby formula in developing countries.¹³⁴ Nestle spent \$1.5 million on federal lobbying in 2018.¹³⁵

PEPSICO. Based in New York state, PepsiCo is best known for drinks like Mountain Dew, Gatorade, and Naked Juice, but the corporation is also America's leading chipmaker. A 1965 merger between Frito-Lay and PepsiCo helped Frito-Lay become the first nationally distributed potato chip brand, and they have dominated chip sales since. Their brands include Tostitos, Doritos, Sun Chips, Ruffles, Stacy's pita chips, Cracker Jacks, Cheetos, Rold Gold pretzels, Sabra hummus, Quaker Oats products, Smart Food popcorn, and Grandma's Cookies.¹³⁶ PepsiCo generated \$64 billion in net revenue¹³⁷ and spent \$3.47 million in federal lobbying in 2018.¹³⁸

KRAFT HEINZ. Investors 3G Capital and Warren Buffet's Berkshire Hathaway orchestrated the merger of Kraft and Heinz in 2014,¹³⁹ creating the third largest food and beverage corporation in North America. Headquartered in Chicago, Kraft Heinz earned \$26 billion in net sales in 2018.¹⁴⁰ The conglomerate's portfolio spans Oscar Mayer, Capri Sun, Lunchables, Ore-Ida fries, Velveeta cheese, Planters nuts, and more.¹⁴¹ Over 10,000 people lost their jobs as a result of the Kraft Heinz merger,¹⁴² but four years later investors suggest "the merger has created no value," according to the Wall Street Journal.¹⁴³ Kraft Heinz spent \$920,000 on federal lobbying in 2018.¹⁴⁴

Cafeteria Operators

The food service management industry, or the business of running cafeterias and restaurants for hospitals, schools, stadiums, corporate headquarters, government offices, and other institutions, is a \$51 billion industry.¹⁴⁵ Three corporations control almost 80 percent of the market.¹⁴⁶ These corporations have massive buying power within the agriculture sector and use it in ways that close off markets to local farmers and other food providers to increase their own bottom lines. They do this by pooling the collective purchasing power of the tens of thousands of locations that they supply to strike large national contracts with equally large food processors, such as Tyson,¹⁴⁷ Kellogg's,¹⁴⁸ and PepsiCo,¹⁴⁹ who then provide "rebates" back to the management corporation. To maximize these rebates, management corporations often force their locations to purchase upwards of 80 percent of their food from approved vendors.¹⁵⁰ These "on contract" purchasing requirements fundamentally limit the ability of individual schools, hospitals, and other institutions to work with local farmers and small businesses. At worst, these rebates represent illegal overcharges to public institutions, as food service management companies may use public dollars to purchase food only to pocket the rebate for themselves.

MAJOR PLAYERS

SODEXO. Based in France and operating worldwide, Sodexo generated revenues of roughly \$24 billion in 2018.¹⁵¹ In 2010, Sodexo paid the State of New York a \$20 million settlement for illegally overcharging New York City schools.¹⁵² Sodexo spent \$300,000 on federal lobbying in 2018.¹⁵³

COMPASS GROUP. Headquartered in the United Kingdom, Compass Group posted over \$30 billion in revenue in 2018.¹⁵⁴ In 2015, the District of Columbia reached a \$19 million settlement with one of Compass Group's subsidiaries for violating their contract and purchasing from highly processed, more expensive food manufacturers to receive rebates.¹⁵⁵

ARAMARK. Headquartered in Philadelphia, Aramark earned \$15 billion in revenue in 2018.¹⁵⁶

Solutions

The largest vehicle for agricultural policy at the federal level is the Farm Bill, which is re-negotiated every four to five years. The most recent Farm Bill, which received significant support from both parties and passed into law in December 2018,¹⁵⁷ maintained the status quo. Several new pieces of legislation, including Senator Cory Booker’s “Food and Agribusiness Merger Moratorium and Antitrust Review Act” and Senator Mike Lee’s bill “Opportunities for Fairness in Farming Act” are promising moves in the right direction, but to restore the balance of power between workers, farmers, and the range of corporate entities in the agriculture industry, the change required is vast.

The Department of Agriculture, Department of Justice, and the Federal Trade Commission also have extensive authority to structure and police agriculture and food markets, but have been almost entirely derelict in recent decades—siding repeatedly with Big Agribusinesses and clearing hundreds of mergers throughout the industry, including mergers between some of the world’s largest corporations.

Restoring competitive markets in agriculture will require Congress and executive agencies to undo decades of bad policy. Below are a set of bold solutions that should be fundamental to any effort to reverse the extraordinary accumulations of monopoly power in agriculture markets:

- **Break up big agribusiness corporations.** The failure of Republicans and Democrats to enforce antitrust laws over the past 40 years has led the largest agribusinesses to consolidate extraordinary amounts of economic and political power over farmers, workers, communities, politicians, and regulators. Congress, the Department of Justice, and the Federal Trade Commission should impose an immediate moratorium on further acquisitions for corporations with dominant market positions and open investigations into the consequences of the dramatic increase in consolidation throughout the agriculture industry. The agencies should also unwind vertical integration in meatpacking, separating corporations such as Tyson and Smithfield into livestock breeders, feed lots, and processing companies. They should take a similar approach with Bayer, DowDupont, BASF, and Syngenta, separating seed and agrichemical sales.
- **Rein in monopolist meatpackers.** The 1921 Packers & Stockyards Act (P&S Act) created the USDA Packers and Stockyards Administration, known as GIPSA today, to police large meat packers for anti-competitive actions and monopolization. But adverse court rulings have gutted its protections for farmers. To make matters worse, in late 2018 the Trump Administration dissolved GIPSA as an independent agency, relegating its duties to the agribusiness-friendly Agricultural Marketing Services agency. The USDA must reinstate GIPSA as an independent agency and give teeth to the P&S Act, with Congress restoring the law to reflect its original intent as needed. GIPSA rule changes should ban packers from owning livestock, abolish abusive tournament payment systems, bring transparency to shadowy meat contracts, require packers to justify their prices, and grant farmers greater legal standing to sue meatpackers, among other reforms.
- **Return power in agricultural co-ops to their members.** Under the Capper-Volstead Act, farmers, ranchers, and other agricultural producers have an antitrust exemption to form cooperatives. Unfortunately, co-ops like Dairy Farms of America have exploited this protection and been managed not for the benefit of farmer-members. Congress should clarify that no corporations or non-farmers get the legal privileges of a co-op. Congress should also ensure that co-ops truly represent all members through democratic governance and without conflicts of interest.

• **Address consolidation through the Farm Bill.** Since the 1950s, the Farm Bill has gradually stripped away supply management policies that stabilize prices and discourage overproduction through things like grain reserves, price floors, and incentives to take land out of production. Instead, farm policies promote maximized production, often beyond demand, driving down prices and pushing farms to survive on volumes. Congress should revisit supply management tools, as well as cap subsidy payouts to the largest farms, improve whole farm revenue insurance, align crop insurance with conservation incentives, and expand USDA loan programs targeting underserved farmers and ranchers. This includes greater credit access for African American, Latino, and Native American farmers, who have faced a long history of documented racial discrimination by USDA¹⁵⁸ and inequitable distribution of agricultural supports and credit that has systematically cut off these farmers opportunities to own land.

• **Better track and investigate foreign interests acquiring U.S. agricultural lands, federal grazing allotments, or commercial fishing privileges.** Foreign entities control more than \$42 billion of agricultural land, roughly the size of Tennessee,¹⁵⁹ although the USDA has been criticized for poorly tracking the extent of foreign land ownership as required by law. Foreign ownership of farmland disadvantages independent farmers, can contribute to increased land speculation, and raises legitimate food and national security concerns. Regulations of foreign farmland ownership vary considerably state to state.¹⁶⁰ Congress must ensure that USDA is accurately tracking foreign ownership of farms, farmland, and other critical agricultural rights like grazing allotments and fishing privileges. Congress should also research a federal standard for regulating foreign farmland ownership.

• **Give farmers the freedom to repair their own equipment.** Farm equipment manufacturers, in particular John Deere, require farmers to rely on their dealers to fix equipment they purchase, prohibiting them from making repairs themselves via licensing agreements and questionable applications of copyright law as farm machinery has become increasingly computerized. Drawing on existing Supreme Court precedent that restricts monopolization and restraints of trade in such “aftermarkets,”¹⁶¹ the antitrust agencies should bring cases and, if necessary, issue rules to allow farmers to quickly and cost-effectively repair their own equipment or to rely on third-party competitors rather than just the original manufacturer.

• **Reform commodity check-off programs.** Under federal law, farmers of many common commodities like milk, wheat, beef, even potatoes and pecans, must pay mandatory fees intended to be used by the U.S. government to research and promote their products.¹⁶² However, this funding is regularly used by trade groups aligned with big agribusiness to support policies that benefit the largest players and further disadvantage independent farmers.¹⁶³ Congress should pass the Opportunities for Fairness in Farming Act to prohibit check-off funds from being used for lobbying and rein in conflicts of interest in check-off leadership. Congress should also pass the Voluntary Checkoff Act to ensure no farmer or rancher is forced to pay fees into programs that do not promote their market segment.

• **End the Fair Labor Standards Act exemptions for farm workers.** The FLSA mandates minimum wage, overtime pay eligibility, record-keeping, and child labor standards for workers in the private sector and in federal, state, and local governments.¹⁶⁴ Agricultural workers are exempt from receiving overtime pay and, for smaller operations, denied the right to a minimum wage. Congress should amend the FLSA to apply the same protections afforded to other workers to agriculture workers and increase enforcement of labor violations in agriculture. The Department of Labor also needs to crack down on labor violations in the H-2A guest worker program and farm labor contracting.¹⁶⁵ Specifically, recent legal decisions in some circuits have established that large

companies that hire workers through labor contractors are considered joint employers, and thus responsible for violating any minimum wage or health and safety laws.¹⁶⁶ Yet agricultural employers still try to shirk legal liability for hired labors' working and living conditions to labor contractors. This joint employment standard must be further strengthened and enforced.

- **Slow killing line speeds.** Currently, animal slaughter speeds are only assessed for their impact on food safety and do not take into consideration how line speeds may impact workers. The USDA should walk back recent killing line speed increases and institute new rules that require speed caps to consider workers' safety outcomes, including the likelihood of injury or chronic illness such as carpal tunnel syndrome, as determined by an independent Department of Labor board.

- **Better prosecute predatory pricing.** One way large retailers take over markets is by selling products at a loss to drive out competitors and then raising prices. This is how Amazon rose to control e-commerce; the corporation lost money during its first seven years of business¹⁶⁷ and did not post consistent profits until 2015,¹⁶⁸ but investors banked on its growing market power. This type of predatory pricing is technically illegal, but difficult to prove, because the government and other plaintiffs need to prove that a price predator will recoup losses by raising prices in the future. As Amazon enters the physical grocery space, it's essential that it not translate its predatory pricing e-commerce strategy into the grocery business. Congress should clarify that a plaintiff does not need to prove that a corporation will recoup its losses in order to sue them for predatory pricing. The FTC could also write a new Section Five rule saying that a dominant firm (with market share greater than a specified threshold) cannot engage in any below cost pricing, period.

- **Ban slotting fees, conditional kickbacks, and exclusive dealing in all food stores and food service.** Slotting fees to access grocery shelves are anti-competitive and rebates conditional on buyers purchasing a certain percentage of their products from a designated company and exclusive purchasing agreements may violate the Sherman and Clayton Acts, yet all of these practices are commonplace in the food industry. The FTC should investigate these practices throughout agriculture and food markets and enforce laws intended to protect competition and independent businesses from these types of anti-competitive activities. These practices should be "per se" or presumptively illegal in any circumstance, and not assessed under the more corporate defendant-friendly "rule of reason."

- **Show consumers where their food comes from by requiring honest country and company of origin labeling.** In 2015, meatpacking monopolies successfully lobbied the Obama Administration to roll back country of origin labeling for beef and pork, leading to a near 50 percent decline in the value of U.S. calves.¹⁶⁹ To make matters worse, a regulatory loophole allows imported meat that simply passes through a USDA-inspected plant to be labeled "Product of U.S.A.," disadvantaging independent American farmers and ranchers further. This loophole should be closed and honest country of origin labeling required so that consumers have the ability to choose to purchase meat raised in the United States. Additionally, products should be required to list their parent company on all packaging.

- **Shine a light on agribusiness' influence over land grant universities.**

Land grant universities increasingly partner with the private sector on agricultural research.¹⁷⁰ This opens the floodgates for agribusiness to influence academia, including by funding research that supports consolidated industrial food production. For instance, in 2017, Iowa legislators cut funding for the famous Leopold Center for Sustainable Agriculture at Iowa State, just as agribusiness allies

including the Iowa Farm Bureau, Iowa Pork Council, and Koch Foundation increased donations to Iowa State.¹⁷¹ Agribusiness funding at land grant institutions undermines academic freedom and limits innovation at a time when the food system needs new sustainable methodologies. To bring greater transparency into academic findings, Congress should require that land grant institutions make the funding sources of all research grants, departments, and faculty endowments public. Additionally, a portion of land grant institutional research funds should be set aside to study sustainable, biodiverse, and small-scale agriculture. Finally, Congress should increase funding for agricultural research and university extension services, to lower reliance on private donors.

Further Reading

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The Illusion of Choice in America's Food System

Listed below are brands and subsidiaries of major corporations that exert significant market power within the food system.

CARGILL

Sterling Silver
Rumba
Excel
Angus Pride
Ranchers Registry
Blackwell Angus
Angus Farms
Genuine Texas Angus Beef
Honeysuckle
Shady Brook Farms

COCA-COLA

Coca-Cola
Diet Coke
Coca-Cola Zero
Dasani
Fanta
Fairlife
Gold Peak
Honest Tea
Mellow Yellow
Minute Maid
Odwalla
Powerade
Simply
SmartWater
Sprite
Surge
Vitamin Water
Zinc

CONAGRA

ACT II
Alexia
Andy Capp's
Angie's BOOMCHICKAPOP
Armour Star
Aunt Jemima (joint venture)
Banquet
Bernstein's
Bertolli
BIGS
Birds Eye
Blake's
Blue Bonnet
Brooks
Celeste Pizza for One
Chef Boyardee
Crunch 'n Munch
DAVID Seeds
Dennison's

Duke's
Duncan Hines
Earth Balance
Egg Beaters
Erin's
EVOL
Fiddle Faddle
Fleischmann's
Frontera
Gardein
Glutino
Gulden's
H.K. Anderson
Hawaiian Snacks
Healthy Choice
Hebrew National
Hungry-Man
Hunt's
Husman's
Jiffy Pop
Kangaroo
Kid Cuisine
La Choy
Lender's
Libby's
Log Cabin
Manwich
Marie Callender's
Mrs. Butterworth's
Mrs. Paul's
Nalley
Odom's Tennessee Pride
Open Pit
Orville Redenbacher's
P.F. Chang's Home Menu
(joint venture)
PAM
Parkay
Penrose
Peter Pan
Poppycock
Ranch Style Beans
Reddi-wip
RO*TEL
Rosarita
Sandwich Bros. of Wisconsin
Slim Jim
Smart Balance
Snack Pack
Snyder of Berlin
Swiss Miss
Tim's Cascade Snacks

Udi's Gluten Free
Van Camp's
Van De Kamps
Vlasic
Wesson
Wicked Kitchen
Wish-Bone
Wolf Brand Chili

DANONE

Activia
Danimals
Dannon
DanActive
Earthbound Farm
Horizon Organic
International Delight
Left Field Farms
Light & Fit
Oikos
Silk
So Delicious
Stok
Vega
Wallaby Organic
YoCrunch
YoCream

DEAN FOODS

Alta Dena
Arctic Splash
Barbers Dairy
Barbe's
Berkeley Farms
Broughton
Brown Cow
Brown's Dairy
Chug
Country Fresh
Country Love
Creamland
DairyPure
Dean's
Fieldcrest
Friendly's
Fruit Rush
Gandy's
Garelick Farms
Hygeia
Jilbert
Knudsen (licensed brand)
Land O Lakes (licensed

brand)
Land-O-Sun & design
Lehigh Valley Dairy Farms
Louis Trauth Dairy Inc.
Mayfield
McArthur
Meadow Brook
Meadow Gold
Mile High Ice Cream
Model Dairy
Morning Glory
Nature's Pride
Nurture
Nutty Buddy
Oak Farms
Orchard Pure
Over the Moon
Pet (licensed brand)
Pog (licensed brand)
Price's
Purity
ReadyLeaf
Reiter
Robinson
Schepps
Stroh's
Swiss Dairy
Swiss Premium
TruMoo
T.G. Lee
Tuscan
Turtle Tracks
Viva
Uncle Matt's

GENERAL MILLS

Betty Crocker
Bisquick
Gold Medal
Immaculate Baking
Pillsbury
Cascadian Farm
Cheerios
Chex
Cinnamon Toast Crunch
Fiber One
Kix
Lucky Charms
Monsters
Total
Trix
Wheaties

Annie's
Green Giant
Helper
Old El Paso
Wanchai Ferry
EPIC
Food Should Taste Good
Larabar
Liberte
Mountain High
Muir Glen
Blue Buffalo
Totino's
Bugles
Fruit Snacks
Gardetto's
Nature Valley
Progresso
Yoki
Yoplait

GRUPO BIMBO

East Balt Bakeries
Bays
Bimbo
Little Bites
Takis
Artesano
Marinela
Alfaro's
Anzio & Sons
Arnold
Ball Park
Barcel
Boboli
Brownberry
Colombo
Colonial
Entenmann's
Eureka
Francisco
Freihofer's
Goldminer
Grace Baking
Heiner's
J.J.Nissen
D'Italiano
Ricolino
Lumber Jack
Maier's
Master
Mother's
Mrs Baird's
Nature's Harvest
Thomas
San Luis Sourdough
Stroehmann
Tia Rosa
Wholesome Harvest
Sara Lee

Oroweat
Old Style
Sanissimo
Rainbo

HERSHEY

5th Avenue
Almond Joy
Brookside
Cadbury
Heath
Hershey's
Kisses
Kit Kat
Reese's
Mounds
Mr. Goodbar
Krackel
Take5
Whatchamacallit
Skor
Symphony
Whoppers
York
Allan
Good & Plenty
Jolly Rancher
Pelon Pel Rico
Twizzlers
Breathsavers
Bubble Yum
Ice Breakers
Milk Duds
Payday
Rolo
Zagnut
Zero
SkinnyPop
Pirate's Booty
Smart Puffs
Original Tings
Dagoba Chocolate
Scharffen Berger
barkTHINS
Krave Jerky

HORMEL FOODS

Hormel
Applegate
Austin Blues
Bufalo Burke
Cafe H
Chi-Chi's
Premium Chicken Breast
Hormel Chili
Columbus
Cure81
Curemaster Reserve
Dan's Prize
Del Fuerte

DeLusso
Dinty Moore
Don Miguel
Dona Maria
Embasa
Evolve
Fontanini
FuseBurger
Gatherings
Herbox
Herdex
Tsang
Jennie-O
Justin's
LaVictoria
Little Sizzlers
Lloyd's
Mary Kitchen
Natural Choice
Not-So-Sloppy-Joe
Old Smokehouse
Refrigerated Entrees
Skippy
Spam
Stagg Chili
Valley Fresh
Vital Cuisin
Wholly Guacamole

JBS SA

5 Star Beef
Grass Run Farms
Showcase Premium USA
Beef
1855 Black Angus
Chef's Exclusive
Aspen Ridge
Cedar River Farms
Blue Ribbon Beef
Blue Ribbon Angus
Showcase
Swift Beef
Four Star Beef
Moyer
Pilgrim's

J. M. SMUCKER

Smucker's
Jif
Crisco
Adams
Crosse & Blackwell
Dickinson's
Knott's
Laura Scudder's
R. W. Knudsen
Sahale Snacks
Santa Cruz
Uncrustables
Truroots

Folgers
Dunkin Donuts (joint venture)
Cafe Bustelo
1850
Kava
Medaglia Doro
Pilon
Rachel Ray Nutrish
Meow Mix
Milk Bone
Natural Balance
Kibbles n Bits
9Lives
Pup-peroni
Nature's Recipe
Canine Carry Outs
Gravy Train
Milo's Kitchen
Snausages
Dad's

KELLOGG'S

Eggo
Froot Loops
Nutri-Grain
Krave
Corn Pops
Happy Inside
Pop-Tarts
Smart Start
Rice Krispies
Mini Wheats
Raisin Bran
Frosted Flakes
Cracklin' Oat Bran
Moe's Southwest Grill
Breakfast Bowls (*joint venture*)
Fruit Flavored Snacks
Crispix
Special K
All-Bran
Apple Jacks
Crunchmania
Mueslix
Kellogg's Corn Flakes
Honey Smacks
Pringles
Cheez-It
Keebler
Animals
Chips Deluxe
Club
Cones
E. L. Fudge
Fudge Shoppe
Grahams
Gripz
Ready Crust

Sandies
Simply Made
Toasted
Town House
Vanilla Wafers
Vienna Fingers
Zesta
Austin
Mother's Cookies
Morningstar
Carr's
Gardenburger
Murray
Famous-Amos
Kashi
Rxbar
Bear Naked

KRAFT HEINZ COMPANY

A.1.
Athenos
Back to Nature Meals
Bagel Bites
Bakers Chocolate
Breakstones
Capri Sun
Classico
Claussen
Cool Whip
Corn Nuts
Country Time
Cracker Barrel Cheese
Crystal Light
Delimex
Gevalia
Grey Poupon
Heinz 57 Sauce
Heinz Chili Sauce
Heinz Cocktail Sauce
Heinz Gravy
Heinz Ketchup
Heinz Vinegar
Jack Daniel's Sauces
Jell-O
Jet-Puffed
Knudsen
Kool-Aid
Kraft Barbeque Sauce
Kraft Foodservice
Kraft Mac and Cheese
Kraft Natural Cheese
Kraft Salad Dressing
Kraft Singles
Lea & Perrins
Lunchables
Maxwell House
Mio
Miracle Whip
Mr. Yoshida's

My Heinz
Nancy's
Ore-Ida
Oscar Mayer
Philadelphia
Planters
Shake N Bake
Stove Top
Sure-Jell
Tassimo
TGI Fridays
Velveeta
Weight Watchers Smart Ones
Wylers

MARS

CocoaVia
Banfield (pet healthcare)
BluePearl (pet healthcare)
Cesar
Eukanuba
Iams
Nutro
Pedigree
Pet Partners (pet healthcare)
Royal Canin
Sheba
Temptations
Waltham (pet research)
Whiskas
Whistle (pet GPS tractor)
Wisdom Panel (pet dna test)
M&M's
Wrigley's Extra
Snickers
Twix
Skittles
Dove
3 Musketeer
5 Gum
Altoids
American Heritage
Big Red
Bounty
Celebrations
Combos
Doublemint
Eclipse
Ethel M
Galaxy
GoodnessKnows
Hubba Bubba
Juicy Fruit
Life Savers
Milky Way
Orbit
Starburst
Winterfresh
Wrigley's Spearmint
Seeds of Change

Tasty Bite
Uncle Ben's

MONDELEZ

belVita
Chips Ahoy!
Dentyne
Enjoy Life Foods
Halls
Newtons
Nilla
Nutter Butter
Oreo
Premium
Ritz
Sour Patch Kids
Stride
Tang
Tate's Bake Shop
Toblerone
Nabisco
Trident
Triscuit
Wheat Thins
Cheese Nips
Teddy
Mallomars
Ginger Snaps
Green & Black's
Good Thins
Honey Maid
Certs
Terry's
Easy Cheese
Barnum's Animals
Stoned Wheat Thins
Comet
Lorna Doone
Swedish Fish

NESTLE

Nestle Toll House
Libby's Pumpkin
Carnation
La Lechera
Abuelita
Nescafe
Nespresso
Nestle Starbucks Alliance
(joint venture)
Coffee Mate
Blue Bottle
Chameleon Cold Brew
Ovaltine
Nestle Hot Cocoa
Nido
Frosty Paws
Milo
Nesquik
Gerber

Buitoni
California Pizza Kitchen
DiGiorno
Freshly
Hot Pockets
Jack's Pizza
Lean Cuisine
Outsider's Pizza
Stouffer's
Sweet Earth Foods
Tombstone Pizza
Wildscape
Dibs
Haagen-Dazs
Outshine
Skinny Cow
Edy's
Dreyer's
Drumstick
Nestle Ice Cream
Proactiv
Cetaphil
Benzac
Loceryl
Galderma (additional
dermatological treatments)
Purina
Bella
Beneful
Beyond
Busy
Purina Dog Chow
Frosty Paws
SecondNature
Waggin' Train
Purina One
Purina Pro Plan
Mighty Dog
Moist & Meaty
Just Right
Alpo
Beggan
Deli-Cat
Fancy Feast
Friskies
Kit & Kaboodle
Friskies
Muse
Scamp
Purina Cat Chow
Tidy Cats
Whisker Lickin's
Yesterday's News
Acqua Panna
Poland Spring
Perrier
Nestle Pure Life
Ozarka
Ice Mountain
Arrowhead

Deer Park
Sanpellegrino
S. Pellegrino
Zephyrhills
Boost (additional liquid
nutrition brands)

PEPSICO

Pepsi
Pure Leaf
Mountain Dew
Bubly
Gatorade
Tropicana
Naked
Soda Stream
Muscle Milk
Lipton (joint venture)
Starbucks Frappuccino (joint
venture)
Aquafina
Brisk
Kevita
Life Wtr
Sierra Must
Stubborn Soda
Izze
Propel
O.N.E. Coconut Water
AMP Energy
Sobe
Mug
Lay's
Doritos
Stacy's
Quaker Oats
Bare
Sabra
Ruffles
Smartfood
Cheetos
Tostitos
Fritos
Near East
Maker Oats
El Isleno
Imagine
Chester's
SunChips
Off The Eaten Path
Rold Gold
Miss Vickie's
Red Rock Deli
Cracker Jacks
Nut Harvest
Life
Matador
Chewy
Santitas

Funyuns
Cap'n Crunch
Pasta Roni & Pasta Roni
Maui Style
Munchies
Munchos
Grandma's
Aunt Jemima

TYSON

Tyson
JimmyDean
Hillshire Farm
Hillshire Snacking
BallPark
Tastemakers
Aidells
Golden Island
State Fair
Nature Raised Farms
Sara Lee
Wright Brand
Bosco's
Gallo Salame
Bonici
Bruss
Chairman's Reserve
IBP
Lady Aster
Mexican Original
Open Prairie Natural Meats
Star Ranch Angus
Supreme Tender Pork
Wunderbar
AdvancePierre Foods
Barber Foods
BigAz
Fast Fixin'
Hot'n'Ready
Jamwich
Landshire
Russer
Steakeze
Orginial Philly
Bryan
True Chews
TopChews
Nudges
Reuben

UNILEVER

Axe
Dove
Dove Men+Care
Hellmann's
Knorr
Lipton
Magnum
Pond's
TRESemme
Talenti

Vaseline
Ben & Jerry's
Breyers
Caress
Clear
Degree
Good Humor
Klondike
Lever2000
Nexxus
Noxzema
Popsicle
Q-Tips
Simple
St. Ives
Suave
Tigi
PGtips

WH GROUP LTD.

Smithfield
Eckrich
Nathan's
Farmland
Armour
Farmer John
Kretschmar
John Morrell
Cook's
Gwaltney
Carando
Margherita
Curly's
Healthy Ones



The Open Markets Institute is a Washington, D.C.-based non-profit that works to address threats to democracy, individual liberties, and national security from today's unprecedented levels of corporate concentration and monopoly power. Credited by the *Financial Times* as “driving the debate” around the resurgence of interest in antitrust, Open Markets uses research and journalism to expose the dangers of monopolization, identifies changes in policy and law to address them, and educates policymakers, academics, movement groups, and other influential stakeholders to re-establish the competitive markets that long formed the bedrock of American democracy.

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