

Introductions



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Grocery Gap Atlas

What is it?





The Grocery Gap Atlas is a geospatial analysis tool measuring the impact of corporate consolidation of the grocery industry on food access.

In other words...





IT'S A MAP



Why did we make a map?

We had a hypothesis...

We made this map to measure how our rapidly consolidating grocery market impacts food access in inequitable ways.

This tool uses publicly available data available to:

- Visualize data on market concentration and food access
- Examine inequitable trends in the grocery industry
- Make data accessible for further research
- Advocate for solutions that lead to a more equitable food system

Data Methodology

How was this tool built?

Grocery Store Locations, Sales Estimates, & Corporate Ownership
InfoGroup Reference USA / Data Axle (1997-2023)

Residential Segregation - Index of Concentration of Extremes (ICE)
Social Determinants of Health by US Census Tract, National Health Care Delivery Research Program, National Institutes of Health (NIH) National Cancer Institute (2012)

Economic Disadvantage
HRSA Area Deprivation Index via University of Washington-Madison Neighborhood Atlas (2022)

Census Geographies and Demographic Data
2020 Census Tract Geographies, American Community Survey (ACS) 2021 5-year estimates, Census Geographic Crosswalks (1990-2020)



What Have We Learned?

42.5%

2000 CR4 Ratio

Concentration Index 2000 (With Dollar Stores)



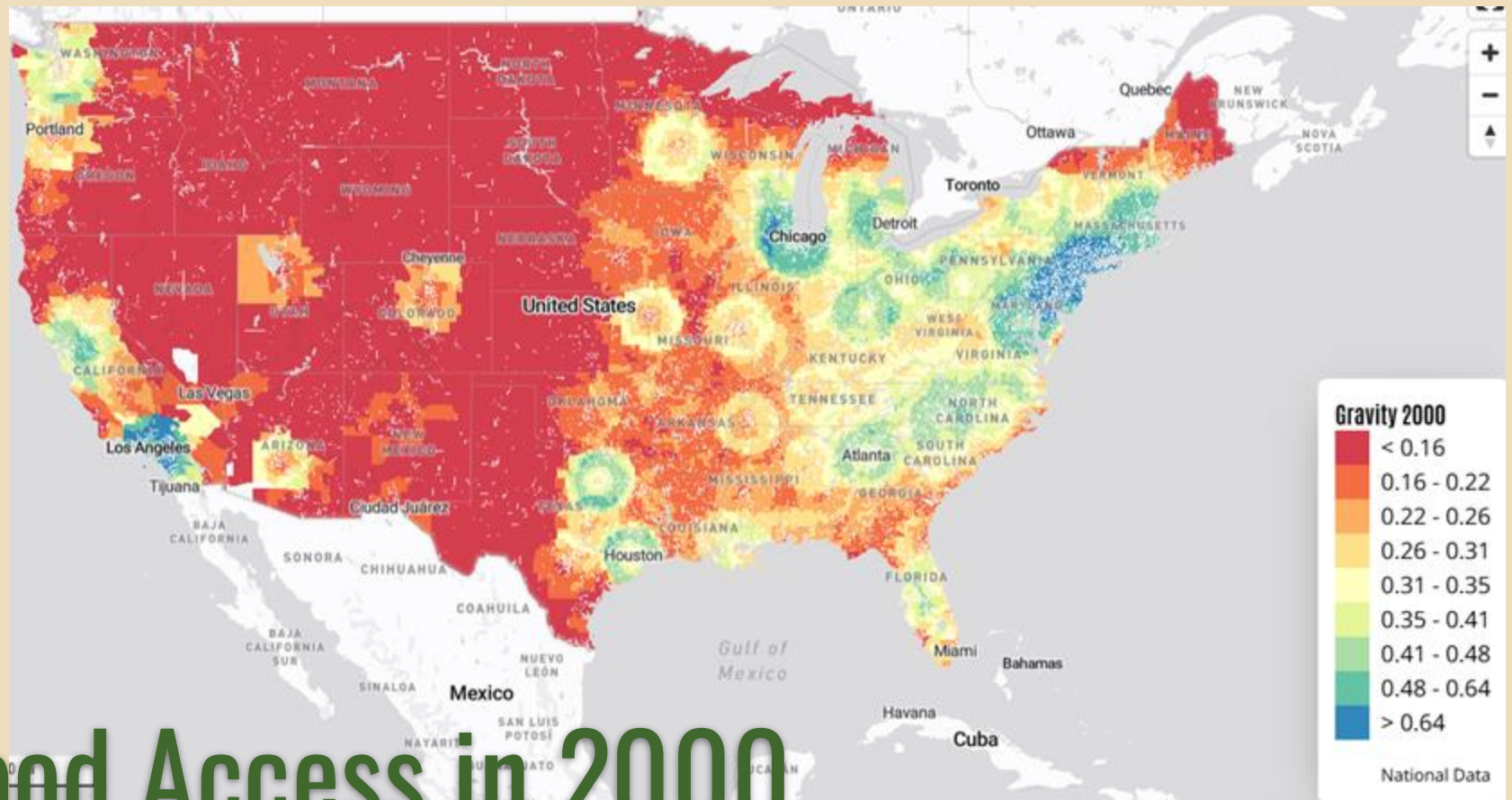
National Data

67%

2023 CR4 Ratio



300 mi

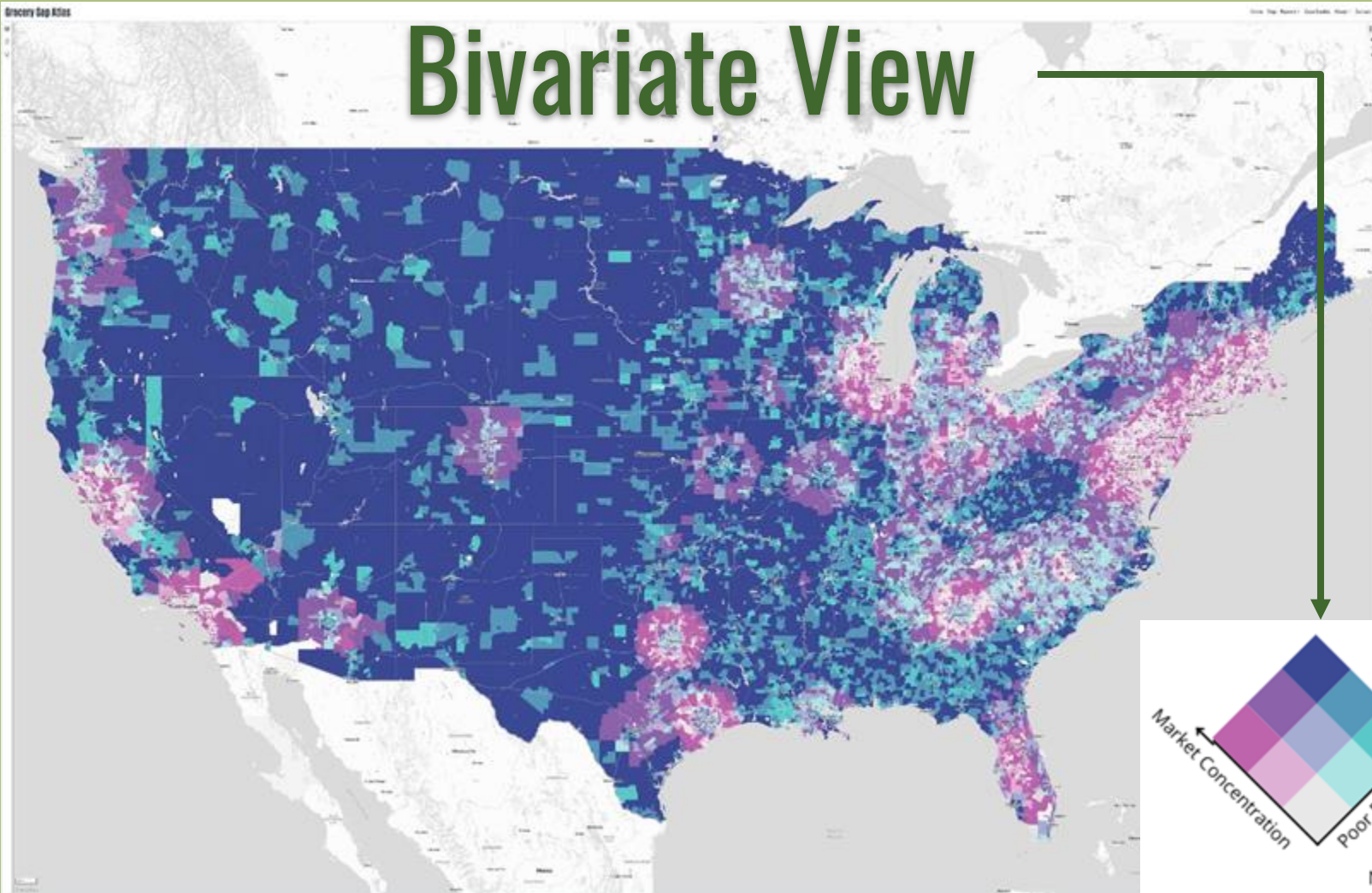


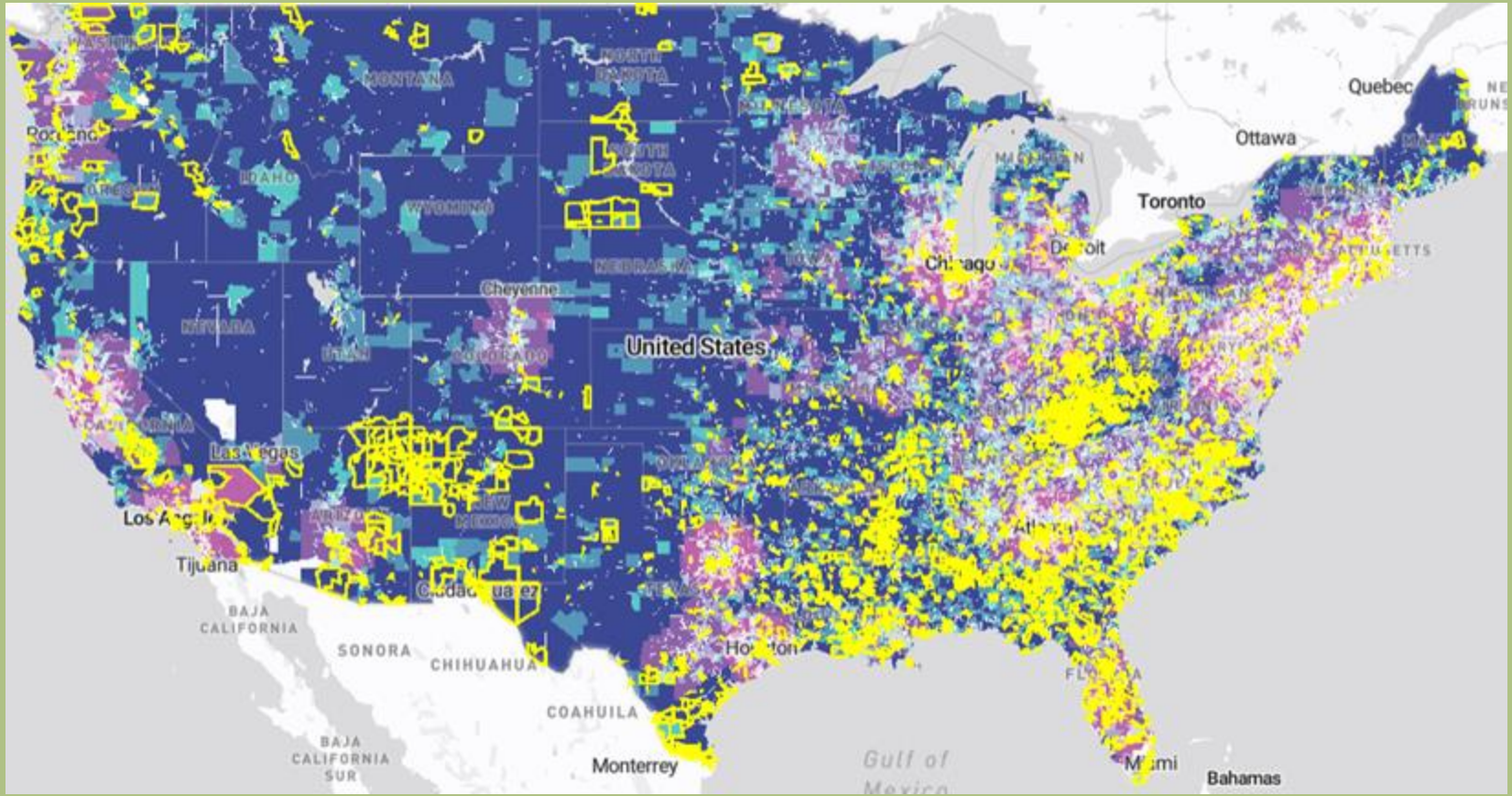
Food Access in 2000



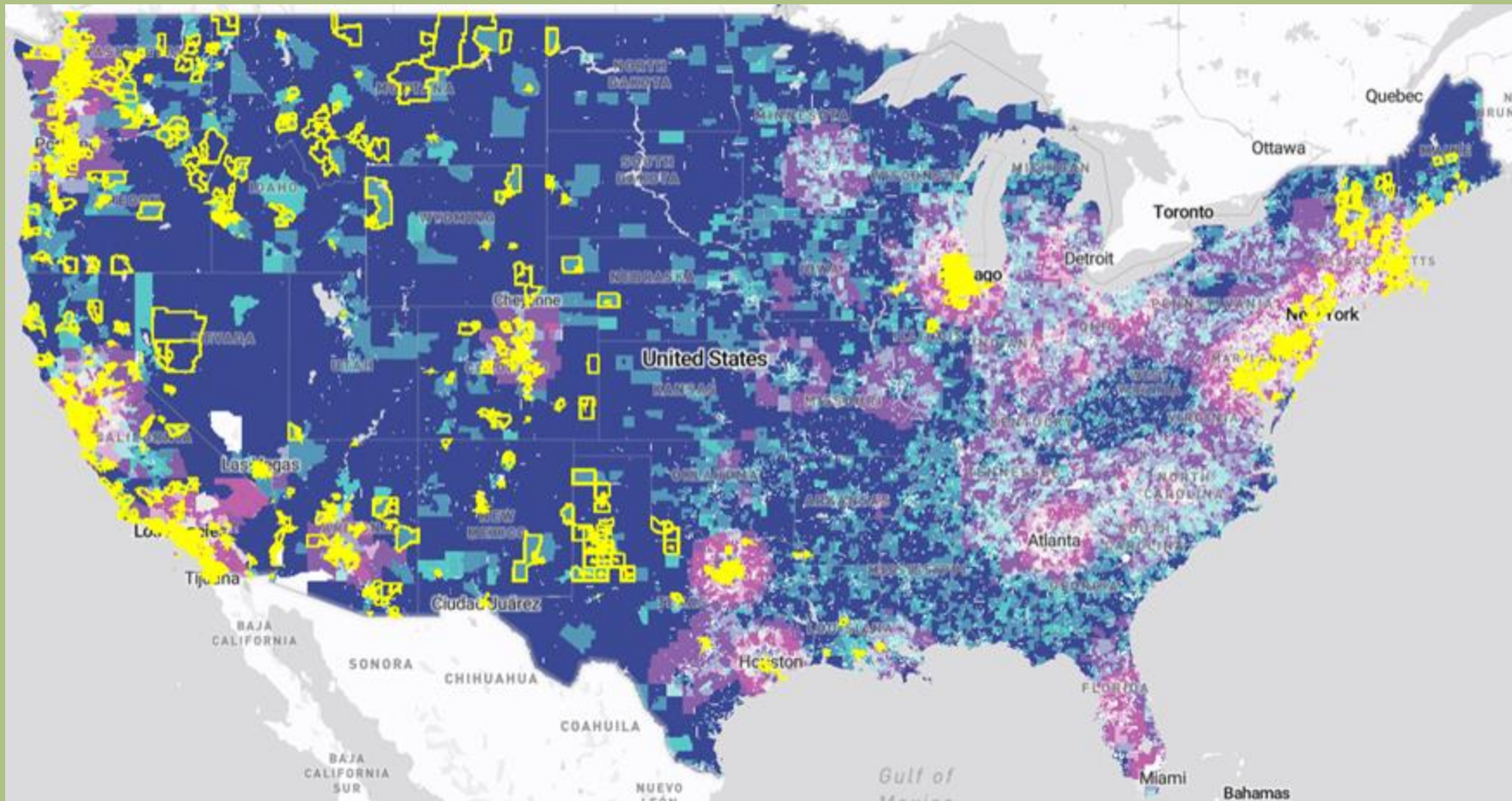
Food Access in 2020

Bivariate View

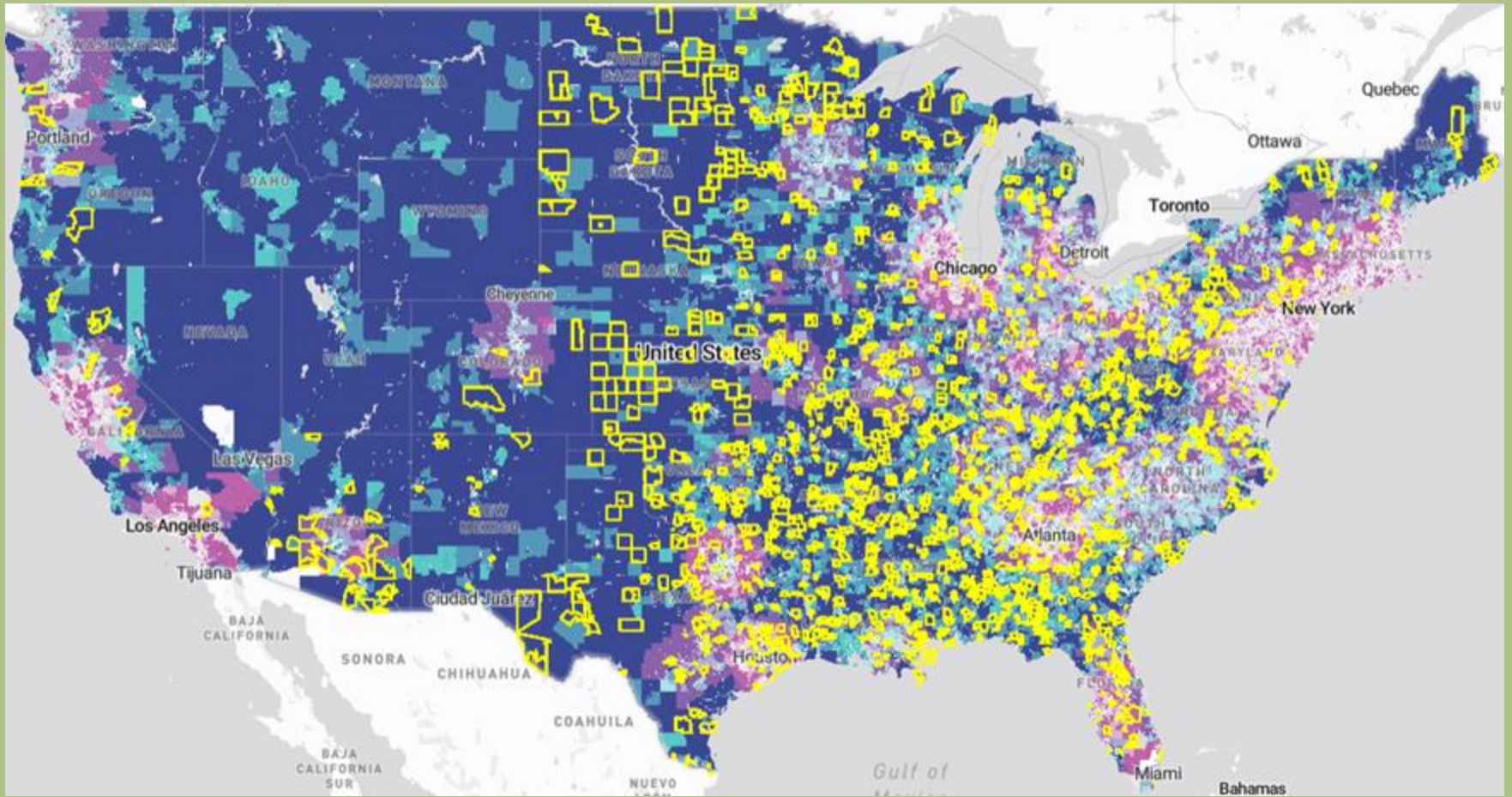




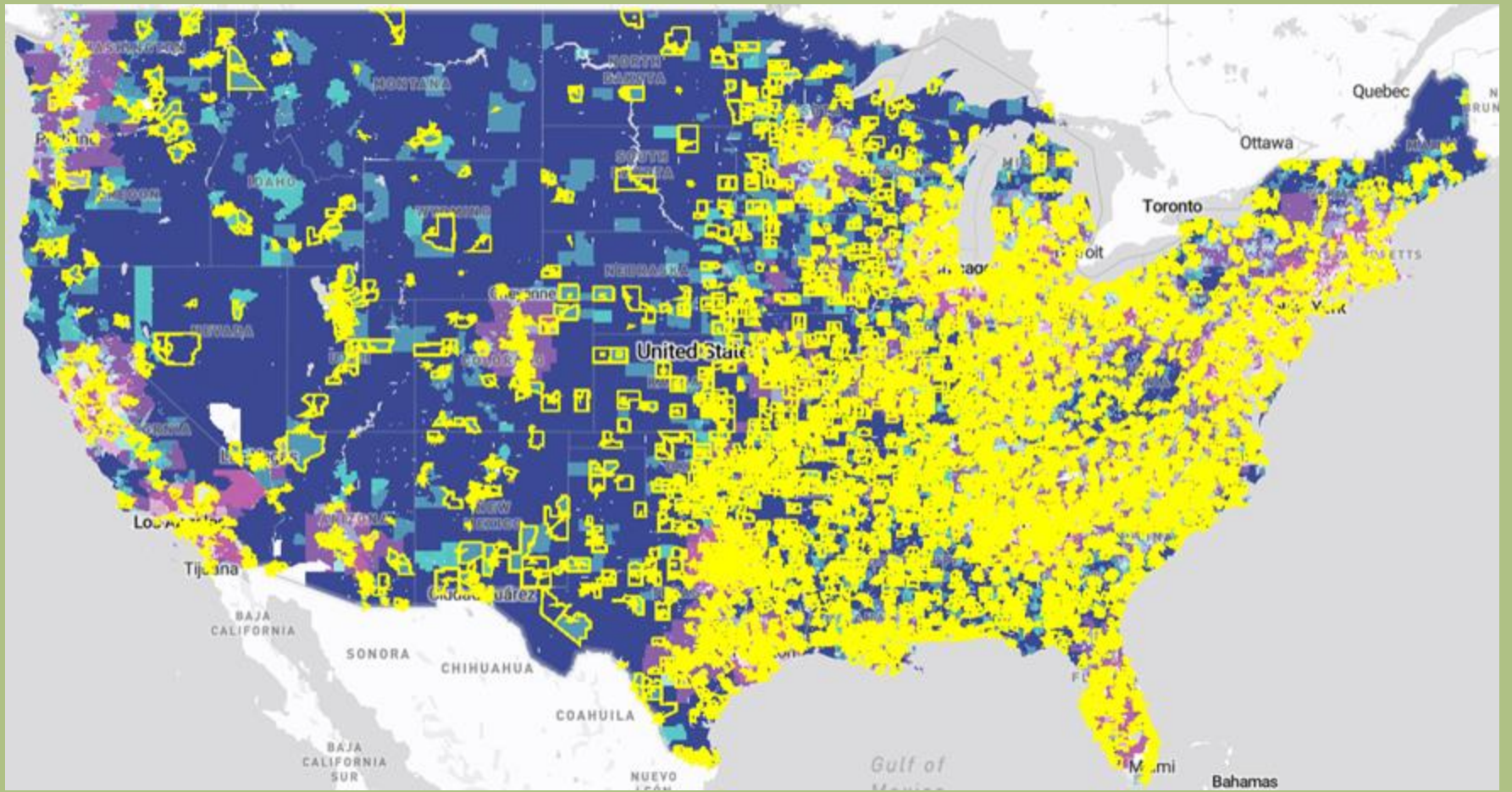
25%+ Receiving SNAP Benefits (2020)



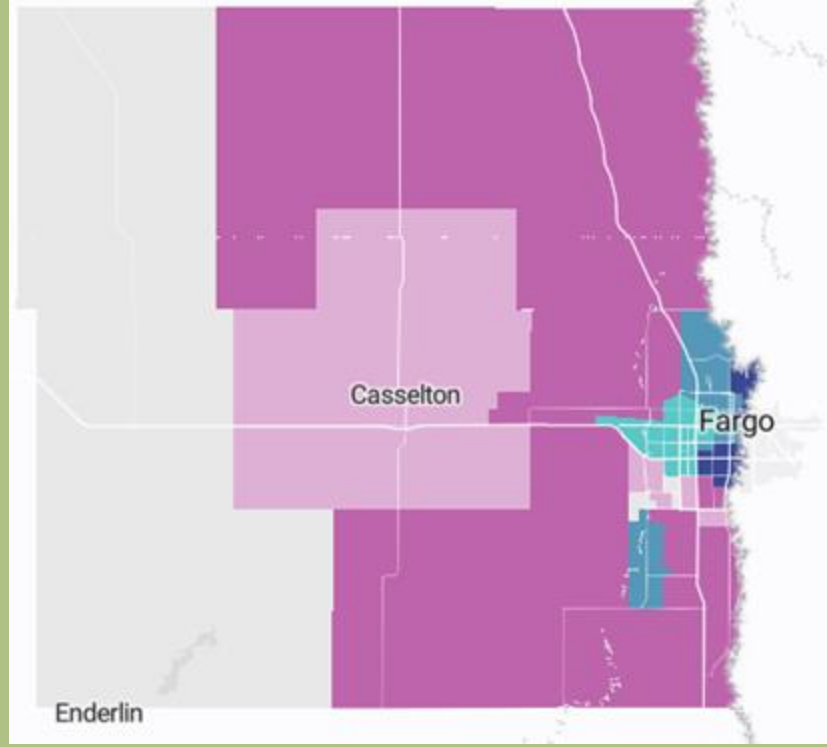
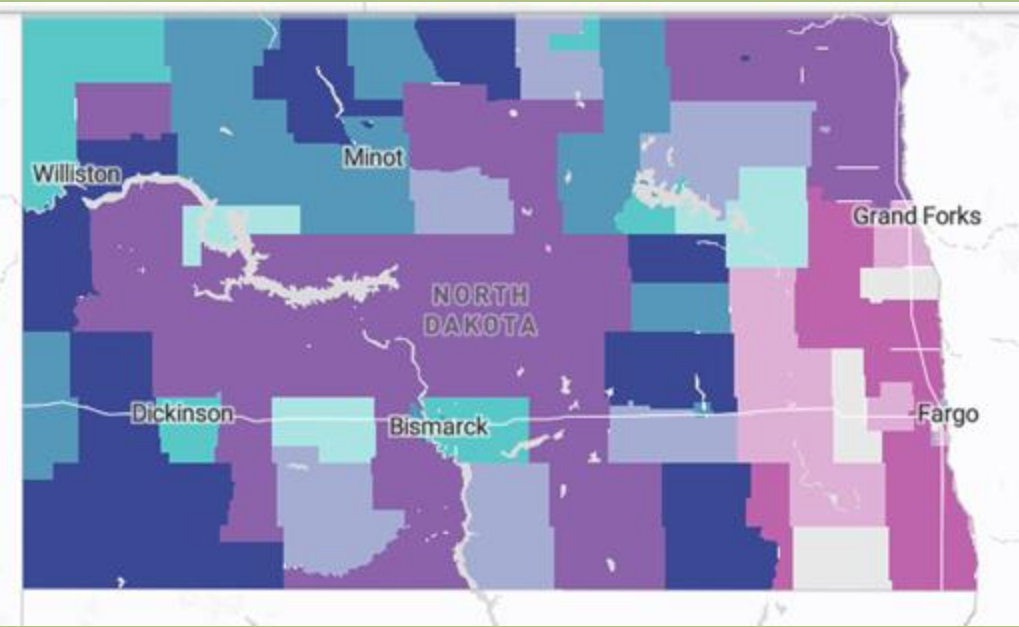
30%+ Albertsons Market Share



30%+ Dollar General Market Share



30%+ Walmart Market Share



North Dakota & Cass County

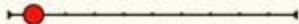
STATE REPORT

North Dakota

This report for North Dakota includes four main scores on the right. Those scores are percentiles, and they reflect how this state measures on food access, market concentration, socioeconomic disadvantage, and residential segregation relative to all other states in the country. The data for this report is primarily based on 2021 Census Data (American Community Survey 2021 5-year estimates) and market data from 2023.

Food Access

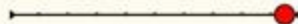
6



North Dakota has better grocery access than 6% of states. 94% of states have better food access than North Dakota.

Market Concentration

98



This state has a less concentrated grocery store market than 2% of all states. 98% of state markets are less concentrated than North Dakota.

Socioeconomic Disadvantage

53



The economic disadvantage of this state is higher than 52.7% of states. It is more advantaged than 47.3% of all states.

Residential Segregation

37

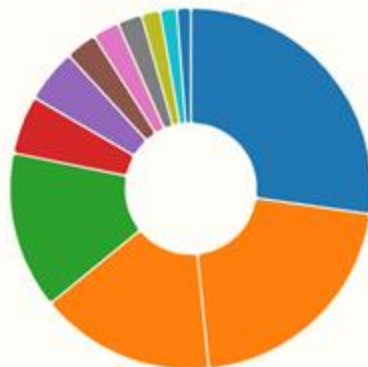


The residential segregation of this state is higher than 37% of all states in the U.S.

Report Sections

- Market Composition
- Community Information
- Race / Ethnicity
- Map
- Change Over Time
- Scatterplot

Estimated Market Share of Grocery Stores in Service Area



- Coborn's Inc (27.6%)
- Walmart Inc (21.4%)
- Spartannash Co (14.2%)
- Valley Markets Inc (5.2%)
- Leevers Foods Inc (4.7%)
- Dollar General Corp (2.7%)
- Target Corp (2.3%)
- Albertsons Co Inc (2.1%)
- Cashwise Grocery (1.6%)
- Costco Wholesale Corp (1.4%)
- Natural Grocers By Vitamin (1.1%)
- Other (15.8%)

State-level Reporting

Dairy

Why Does it Matter?

12

Ice cream
Desserts
Eggs
Margarine
Cheese
Milk
✓ Full Line
Project

When corporate concentration increases, food access decreases.

Impacted Geographies

- Rural West
- Mississippi Delta
- Appalachia
- Southwest



Impacted Populations

Who tends to experience the impacts of high concentration and low food access the most acutely?

Rural Populations

- Elders
- Farming Communities

People of Color

- Native American populations
 - Hispanic centers
-

TINA TURNER

WHAT'S **DATA** GOT
TO DO WITH IT



Advocacy Applications



Grassroots Policy Engagement

Antitrust Enforcement

Fair Prices for Small Businesses

**Corporate grocery
seeks to maximize
profit extraction,
not equitable food
access.**

- Hold corporate players accountable
 - Remove obstacles for beginning and community-backed food retail operations
 - Imagine new ways of selling food both informally and at scale
 - Make food access equitable at local and national levels
-

A photograph of a brown goat with large, floppy ears standing in a field of green plants. The goat is looking towards the camera. The background shows a cloudy sky and more greenery.

Q&A

The logo for 'rafi' is located in the bottom right corner. It features the word 'rafi' in a lowercase, green, monospace-style font. Above the letter 'i' is a small black silhouette of a goat's head.

rafi