sociedade
& natureza

DOI: 10.14393/SN-v33-2021-59769
Received: March 11, 2021 | Accepted: July 07, 2021 | Published: September 23, 2021

Geographic Dynamics of the Supermarket Sector in Brasília (DF)

Juscelino Eudâmidas Bezerra[1]
Marcelo Ramalho Agner[2]

Keywords:
Food retail
Territorial strategies
Distrito Federal

Abstract

The commercialization of food in cities is increasingly influenced by the presence of supermarket chains, which are self-service retail establishments with a predominance of food products. The agile, efficient, and low-cost marketing model was the one that was most strengthened in the context of the urbanization of society. In Brazil, there are few studies that seek to contextualize the performance of retail capital in other urban centers located outside the southeastern region of the country. This article aims to analyze the geographic dynamics of the supermarket sector in Brasília – DF through the understanding of the multi-scale performance of chains in the territory according to their capital origin, location strategies, and establishment profiles. The methodology consisted inof the production and systematization of information about the supermarket sector through the quantitative and qualitative evolution of establishments linked to the Associação de Supermercados de Brasília (ASBRA). As a result of this research, one can to locate the world's main retail chains in Brasilia, which demonstrates the importance of the country's capital as a consumption space in the globalized economy. The selective use of the territory by the different retail chains enabled the adoption of differentiated actions, dependent on the income pattern of each administrative region of the city. The research contributed to evidence the heterogeneity of the sector and the conformation of commercial strategies adapted to the geographic reality marked by structural socio-spatial inequality.

[1] Universidade de Brasília, Brasília - UnB, Brasília, DF, Brazil. jebgeo@unb.br
[2] Universidade de Brasília, Brasília - UnB, Brasília, DF, Brazil. mark.agner@gmail.com

INTRODUCTION

The presence of supermarkets in city commerce is now a consolidated reality in Brazil, which directly affects policies of supply, marketing, distribution, and consumption of food by families. All this is part of a larger phenomenon, represented by the spread of new eating habits with direct and indirect repercussions on the daily lives of millions of people.

Since the second half of the 20th century, Brazil has seen an increase in the number of self-service commercial establishments (supermarkets). This situation helps to define a new form of commercial food transaction, with direct access to goods by consumers and the presence of checkouts.

The growth of large cities and the strengthening of the domestic market's consumption potential were driving factors for the investment of national and multinational chains in the retail food business in Brazil. The 1990s mark a turning point in retail evolution, decisive for the establishment of a periodization based on structural cycles. According to Serrentino (2015), the Brazilian retail sector can be analyzed through four cycles grouped into periods, namely: pre-liberalization/pre-Real Plan (until 1993), post-Real Plan (1994-2003), consumption boom (2004-2012), and maturity and productivity (starting in 2013).

During the first cycle, the retail sector operated in the context of a closed economy with a high degree of informality and low purchasing power, limited by chronic inflation. The year 1994 marks a second cycle for the sector in Brazil with trade liberalization and the launch of the Real Plan stabilization program, whose new currency brought inflation under control, a problem that had constrained retail expansion over a long period of time. This allowed for an increase in income through the end of the inflation tax; a change in scale of the market; and stimuli for the retail internationalization process and the development of the credit market (SERRENTINO, 2015).

In the early 2000s, the sector experienced its third cycle, which was characterized by a consumption boom in the context of a scenario of significant economic and social transformations. The focus was on expansion through the organic opening of new establishments, the creation of new formats, business diversification, entry into new markets, mergers and acquisitions, and business capitalization. The expanding level of internationalization, the entry of private equity funds, and the increasing informality and the dissemination of technology is also to be highlighted (SERRENTINO, 2015).

According to Serrentino (2015), 2013 marks the start of the fourth and final cycle, characterized by the sector's achieving maturity and productivity. Signs of an economic slowdown with negative GDP growth and a downturn in consumer spending demanded investments in productivity from the retail sector, with greater precision in investment analysis, infrastructure allocations, and refinements in-store operations.

The most current picture registered by the Brazilian Supermarket Association – ABRAS (REVISTA SUPERHIPER, 2019) indicates that the self-service retail sector, despite moments of crisis, continued to register growth in the number of stores. Thus, in 2018, there were 89,673 self-service establishments spread across all regions in the country, with revenues reaching the figure of R$ 355.7 billion, accounting for 5% of the national GDP.

Given the relevance of the self-service retail sector to understanding the urban dynamics of consumption, supermarkets as a theme have become an object of research in several areas of knowledge. Geography's analytical focus allows us, for example, to examine them as commercial establishments that exhibit a complex geographical network with multi-scale interactions; that demonstrate a predominantly urban operation, albeit with implications for the rural-urban relation; and that mobilize a range of sectors, such as agriculture, industry, transportation, logistics, distribution, and trade (PINTAUDI, 1981; SILVA, 2003; CLEPS, 2005). In other words, supermarkets institute in contemporary times a true exercise of territorial management that becomes a *sine qua non* for their existence in the flow economy, characteristic of globalization. Furthermore, they represent the most didactic way to understand the link between production and consumption materialized in the apparently simple gesture of picking a product off the shelf.

Through the most recent studies on food retail, new themes are being explored in parallel to the sector's transformations. Among the main investigations, those that stand out focus on understanding the territorial performance of supermarket companies and their internationalization process (WRIGLEY et al., 2005; COE; WRIGLEY, 2018; COE, 2004; REARDON; BERDEGUE, 2002; HUMPHREY, 2007); on the emergence of new typologies of commerce and strategies of location and competition (FARINA; NUNES; MONTEIRO, 2005; FERREIRA, 2013; MINADEOS; CARMARGOS, 2009); on the cultural practices of consumption (OOSTERVEER; GUIVANT; SPPARGAREN, 2010); and on the role of supermarkets in the governance of the agri-food sector (LAWRENCE; BURCH, 2007; OOESTERVEER; SONNENFELD, 2012; BEZERRA, 2012).

In Brazil, there is a demand for studies that contextualize the national panorama of the performance of retail capital. The city of São Paulo and its metropolitan region have historically represented the privileged spatial reference for these studies. There is, therefore, still a gap in the analyses that scrutinize the characteristics and peculiarities of the "supermarketization" process in the context of diffuse urbanization.

This article aims to analyze the geographic dynamics of the supermarket sector in Brasilia, encompassing the 33 administrative regions (RA's) of the Distrito Federal. The analysis will be conducted by means of the understanding of the multi-scalarity of the chains' operations in the territory in relation to the origins of the capital and the examination of the chains' location strategies and their various establishment profiles.

The choice of the urban setting of Brasília is linked to the fact that the city, equivalent to a municipality, is the third most populous in the country, after São Paulo and Rio de Janeiro. Brasília surpassed three million inhabitants in Brazilian Statistics Institute population estimate (IBGE,2018), which is the federal agency responsible for statistical, geographic, cartographic, geodetic and environmental information in Brazil. When the municipalities that make up its metropolitan area are included, as delimited by the Federal District Planning Company (CODEPLAN, 2020), which is responsible for elaborate studies and researches about public policies in Distrito Federal, the population exceeds four million.

In terms of income and consumption potential, Brasilia has the highest per capita household income index in the country and the third-highest consumption market potential (IPC MAPS, 2020); i.e., it is a very important location in the Brazilian urban network.

To carry out this research, the methodology consisted in the production and systematization of primary information by visiting the commercial establishments linked to the Supermarket Association of Brasília (ASBRA), which is a private association representing the most important group of supermarket chains in Brazil,and secondary data from public agencies, documents, and sector publications. From the 38 companies associated with ASBRA, 193 establishments were accounted for, which served as the research universe for subsequent verification and sorting, resulting in a total of 175 establishments effectively visited during *in loco* fieldwork.

The article is divided into two sections, besides this introduction and the final considerations. The first is dedicated to the geographical development of the supermarket sector in Brasilia, with special attention to the growth in the number of stores, their territorial performance, the presence of chains in the city, and the participation of local, national, and international capital. The second section seeks to analyze the multi-format retail strategy as the most used by supermarket chains for their expansion in the urban context in the city, from the creation of neighborhood supermarkets, conventional supermarkets, hypermarkets and, more recently, the spread of cash-and-carry wholesalers.

The supermarket sector in Brasília: evolution and characterization

The 1950s, when construction of the city of Brasília began, marks the moment when supermarkets first appear and become consolidated as an important channel of food marketing in the main cities of Brazil, especially in São Paulo (FERREIRA, 2013).

The analysis of the food retail sector in Brasilia brings particular challenges because it is a planned city built from the ground up and that emerges with self-induced demands. In the year of its inauguration, in 1960, Plano Piloto and the first urban centers had, at the time, more than 140 thousand inhabitants (PAVIANI, 2007).

Commercial spaces had a predetermined location in Lúcio Costa's urban plan and were mostly located in the commercial axis delimited by the W3 Avenue in the southern and northern sectors, as well as the commercial areas located in the residential inter-blocks. With the completion of the city's construction and the arrival of the first residents to the superblocks, who were transferred from the former capital, the constitution of the "satellite cities," and the increase in the migratory flow, the demand for regular access to goods and food increased, forcing the government to intervene.

The self-service retail in Brasilia was, at first, a state activity, as evidenced by the creation of the state-owned company Sociedade de Abastecimento de Brasília (SAB – *Brasilia Supply Company*), founded in 1962. SAB was created with the objective of supplying the urban demand for food sales during the period in which there were no private chains present in the federal capital. It also performed the role of stimulating local food production. The state-owned company had seven establishments in the administrative regions of Plano Piloto, Lago Sul, Lago Norte, and Gama.

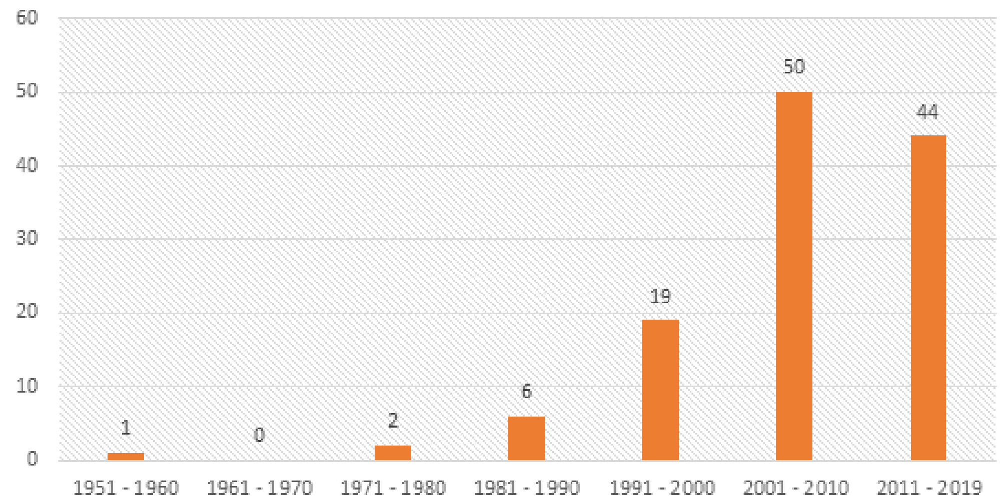
Still in the 1960s and 1970s, other supermarket chains started to operate in Brasilia besides the state-owned SAB, such as the supermarkets Casas da Banha, Supermercado Slaviero, Supermercado Planalto, Rede Somar, Minibox and Jumbo (Grupo Pão de Açúcar). The latter opened the first hypermarket in Brasilia, in 1971, in the recently opened Conjunto Nacional shopping center – the second shopping center built in Brazil –, located in the heart of the city, next to Plano Piloto's bus station.

The arrival of private chains in the retail sector contributed to the loss of SAB's competitiveness and its activities were shut down in the late 1980s. Since then, Brasília's food retail has been in effect controlled by local, national, and international chains, along with the continuing presence of supply centers, fairs, and public markets.

The dynamics of the supermarket sector over the past six decades shows that the 1990s brought Brasilia, as well as Brazil, a vertiginous growth in the number of supermarkets due to the liberalization of trade, the greater control of inflation, and the creation of a new currency (the Real). At the beginning of the 21st century, the number of new establishments was even more expressive, which helps to understand the consolidation of purchasing power as a result of economic stability, a crucial condition for the supermarket business.

Through data collected with the participating establishments (122), we arrived at the number of establishments per decade (Figure 1). Note that the information corresponds to data that was obtained from the field; i.e., it does not correspond to the actual number of all establishments that opened in Brasilia.

Figure 1 - Number of commercial establishments inaugurated per decade in Brasília (DF)



Source: Elaborated by the authors with data extracted from fieldwork (2019).

From the point of view of the location, it was possible to observe the expansion of new establishments beyond the Plano Piloto region – the first administrative region to be built in the capital – towards contiguous regions from the 1980s onwards. Thus, the greatest increase in the number of establishments between 1990 and 2000 occurred in the administrative regions with larger populations that were father from the high-income strata, such as Ceilândia, Sobradinho, Samambaia, and Gama.

As the supermarket sector in the country's capital evolved and diversified, it has become essential to be able to identify the main chains that operate in Brasilia in order to understand the links between local, national, and international capital networks, whose spatial strategies of operation occur in a multi-scale context. The geographical scale of the commercial capital's actions is a relevant piece of data to be considered, since multi-scalarity is understood as a resource to be used in territorial strategies, granting greater market power. The scale is linked, as will be shown, to the variety of types of establishment formats chosen for each territory of operation.

Due to the impracticality of investigating the universe of all self-service retail establishments in Brasilia in all its 33 administrative regions, it was necessary to adopt a strategy that could represent the supermarket sector. For such, only the supermarket chains which are members of the Supermarket Association of Brasília (ASBRA) would be analyzed through the systematization of a primary data bank obtained through fieldwork.

Of the 38 companies associated with ASBRA, 193 establishments were accounted for within the boundaries of the Distrito Federal. From investigations conducted in the context of the research project funded by the Federal District Research Foundation (FAPDF), which is the local agency responsible for the support and promote the scientific, technological and innovation development of the Distrito Federal,entitled “Supermarket chains in Brasilia: territorial dynamics and governance strategies of the agri-food sector,” in the period from 2016 to 2019, 175 establishments were visited, reaching, therefore, more than 90% of the universe of establishments linked to ASBRA.

The first factor to be observed consists in the territorial performance of the chains, that is the scale in which they manage to articulate their commercial actions. The classification for this factor was elaborated as follows:

- Companies that only have one establishment in Brasilia are considered local establishments;
- Companies that have more than one establishment whose presence is confined to Brasilia are considered local chains;
- Chains that have establishments in Brasilia and in another federative unit within the Central-West macro-region are regional chains;
- Chains that have establishments in more than one macro-region are considered national chains;
- Chains that have establishments in Brazil and in other countries are considered multinational chains.

Among the 38 companies affiliated with ASBRA, 79% (30) were identified as local establishments and chains; 11% (4), multinational; and 5%, respectively, as regional (2) and national (2) capital. Regarding the spatial distribution of supermarkets in Brasilia, the RA’s with the largest quantity of establishments were found to be: Plano Piloto (37), Taguatinga (22), Ceilândia (20), Águas Claras (15), Samambaia (13), and Guará (11).

Despite the observation that the percentage of local companies is vastly higher than the multinational capital segment, the geographic dynamics show qualitatively different participation of the chains in the territory of Brasilia.

The main multinational companies represent those that lead the ABRAS ranking (REVISTA SUPERHIPER, 2019) and operate in the five Brazilian macro-regions, such as the French companies Carrefour and GPA (belonging to the Casino group), the US’s Walmart, and the Dutch Makro, sold to the Carrefour group in February 2020, but which was still under the ownership of its group of origin during the survey.

Carrefour operates in Brasilia with several store concepts, the most prominent being the Carrefour Bairro, Hipermercados Carrefour, and Atacadão stores. GPA, on the other hand, has the banner logo Pão de Açúcar for neighborhood stores, Extra for hypermarkets, and Assaí for cash-and-carry wholesalers. Walmart (now BIG Group) has its own name-brand stores as well as the Sam’s Club franchise, while Makro uses its own name-brand cash-and-carry wholesaler.

The local segment (stores and chains) has a large number of companies and of commercial establishments. Its performance in the territory is, however, very limited, with no simultaneous operation in the different administrative regions. The exception to this more general picture are those chains that have achieved a higher degree of territorial capillarities, such as the Big Box chain, with 25 establishments and diversity of formats; Supercei, with 15 stores in several RA’s; and Dona de Casa and Superbom, with 12 establishments each.

The national and regional segments have a small presence in Brasília, thus replicating the more general trend that occurs in the country. Some national chains, such as Grupo Pereira, owner of the Comper banner, and Oba Hortifruti, have resources and establishments with privileged locations in higher-income areas. The regional capital is mixed in with the dynamics of the Metropolitan Area of Brasilia (MAB), as these chains carry quite strong influence in the municipalities of Goiás State that are part of MAB and in the nearby RA’s. Exemplifying this category, the Tatico and Dia a Dia chains are worth mentioning.

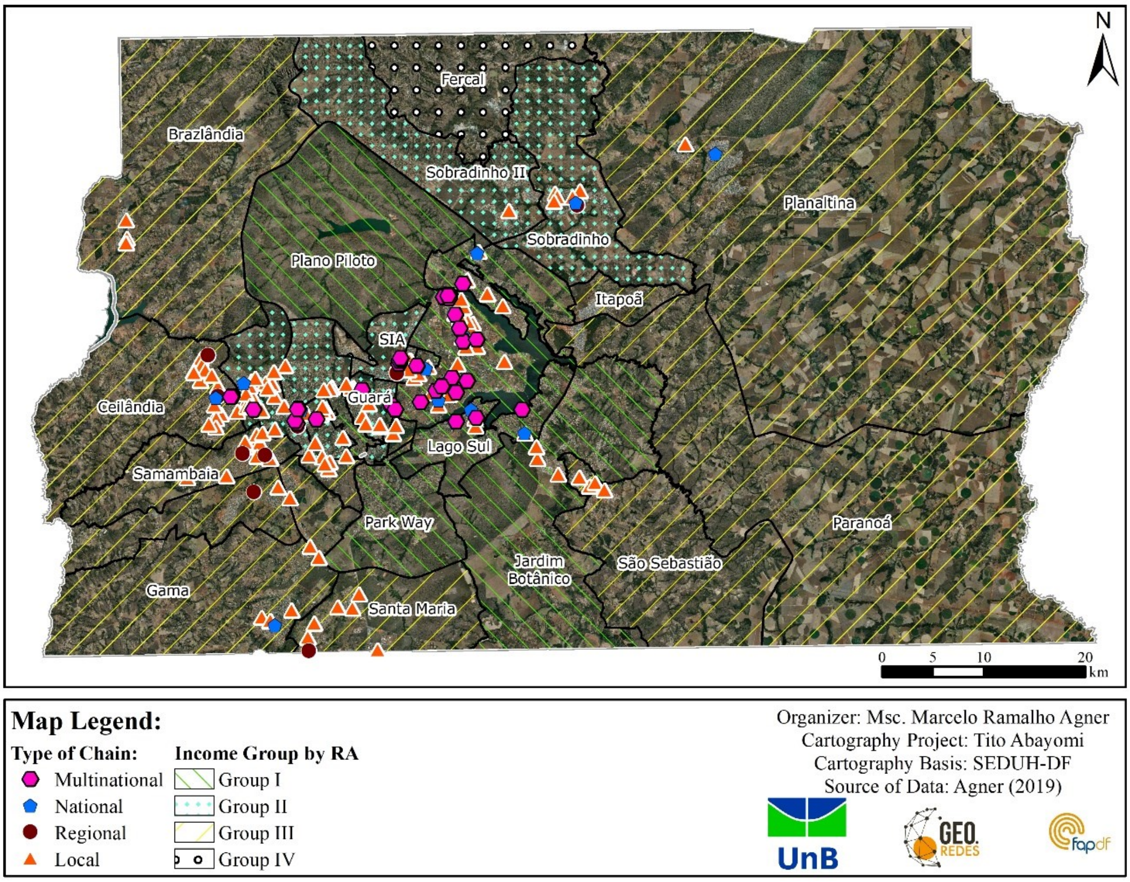
The evolution of the demographic issue in the Distrito Federal reveals that the Plano Piloto RA – Brasília concentrates the largest number of establishments, with 37 stores, followed by Taguatinga and Ceilândia, with 20 and 22 establishments, respectively. On this point, it is necessary to mention that the regions with the largest population do not necessarily concentrate the largest number of establishments. Highly populated administrative regions with more than 100,000 inhabitants according to the Population Projections for the Administrative Regions of the Federal District 2010-2020 (CODEPLAN, 2020) such as Planaltina, Recanto das Emas, Sobradinho II, Santa Maria, and Gama do not exceed the number of seven establishments.

The contrast between the population size and the concentration of establishments requires the scrutiny of a more complex relationship that allows for the analysis of the territorial dynamics of the supermarket sector in the Distrito Federal. Based on this, the household income criterion was chosen as a determining factor to examine the profile of the administrative regions and their particular level of activity in the food retail sector.

The classification of the administrative regions by average monthly household income developed by CODEPLAN (2018) divides the regions into four major groups, namely: Group I - High income: average household income of RS 15,622; Group II - Medium – High income: average household income of R$ 7,266; Group III - Medium – Low income: average household income of R$ 3,101; Group IV - Low income: average household income of R$ 2,472.

Based on the location strategy of the supermarket chains (Figure 2), one can see how the retail chains use the territory according to their social and economic characteristics in the context of the huge discrepancy inf household income. Thus, the composition of the administrative regions reveals that, in Brasília, classes with income differences around R$ 12,000 coexist, as can be witnessed in the disparity between regions of the lowest household income group, such as the Setor Complementar de Indústria e Abastecimento (SCIA) – Estrutural and the highest household income group, such as Lago Sul.

Figure 2 - Supermarket location, capital origin, and household income in Brasília (DF)



Source: elaborated by the authors (2020).

There is also a variety of situations within the groups themselves, as is the case of the medium-high income group. Regions like Águas Claras and Vicente Pires present household incomes of approximately R$ 8,500 monthly, while the two smallest in the group, Sobradinho and Núcleo Bandeirante, present around R$ 5,300. In the medium low-income group, we also identified this difference, represented by a disparity of about R$ 2,300 between the highest and the lowest average income in the group.

This division between groups was used to illustrate the consumption potential and socio-spatial inequality. Thus, despite its average income is much higher than that of the country, Brasilia presents one of the highest income inequalities according to the Gini index, reaching 0.58 according to PDAD (2018).

By analyzing location and socio-economic aspects, it is possible to verify that there is a higher density of establishments in the administrative regions with higher household disposable income and high population size. Besides the relationship between urban flows and the greater presence of commerce, it is possible to identify that the participation of the multinational chains is strongly linked to the territorial concentration of income in Brasília.

The establishments of the multinational chains were, on one hand, found in only nine of the thirty-three administrative regions of the Distrito Federal. On the other hand, in the lower-income regions, we observed just the opposite; that is, we identified not only the absence of multinational chains, but also a lower density in the number of establishments and the massive presence of local companies.

In order to better understand the expansion of supermarket chains, it is necessary to investigate the adoption of multi-format retailing, because this is the main strategy in the attempt to adapt to the consumers' profile in the different urban contexts.

The configuration of multi-format retailing: diversification as a strategy

One aspect that differentiates the dynamics of the different chains that operate in the retail sector in the city concerns the store format or model, that is, how it organizes its chain of operations by type of establishment. There are, then, numerous proposals of definitions about the different types of formats, in which the most widespread and present are the neighborhood supermarkets, the conventional supermarkets, the hypermarkets, and the cash-and-carry wholesalers.

The neighborhood supermarkets are defined, according to Borges (2001), by their location in residential neighborhoods. The dimensions vary, reaching a maximum of 700 m², an average of 7 checkouts and 4 thousand items organized into five basic sections focused exclusively on food products: grocery, butcher, fruits, legumes, vegetables, cold cuts/dairy products, and bazaar.

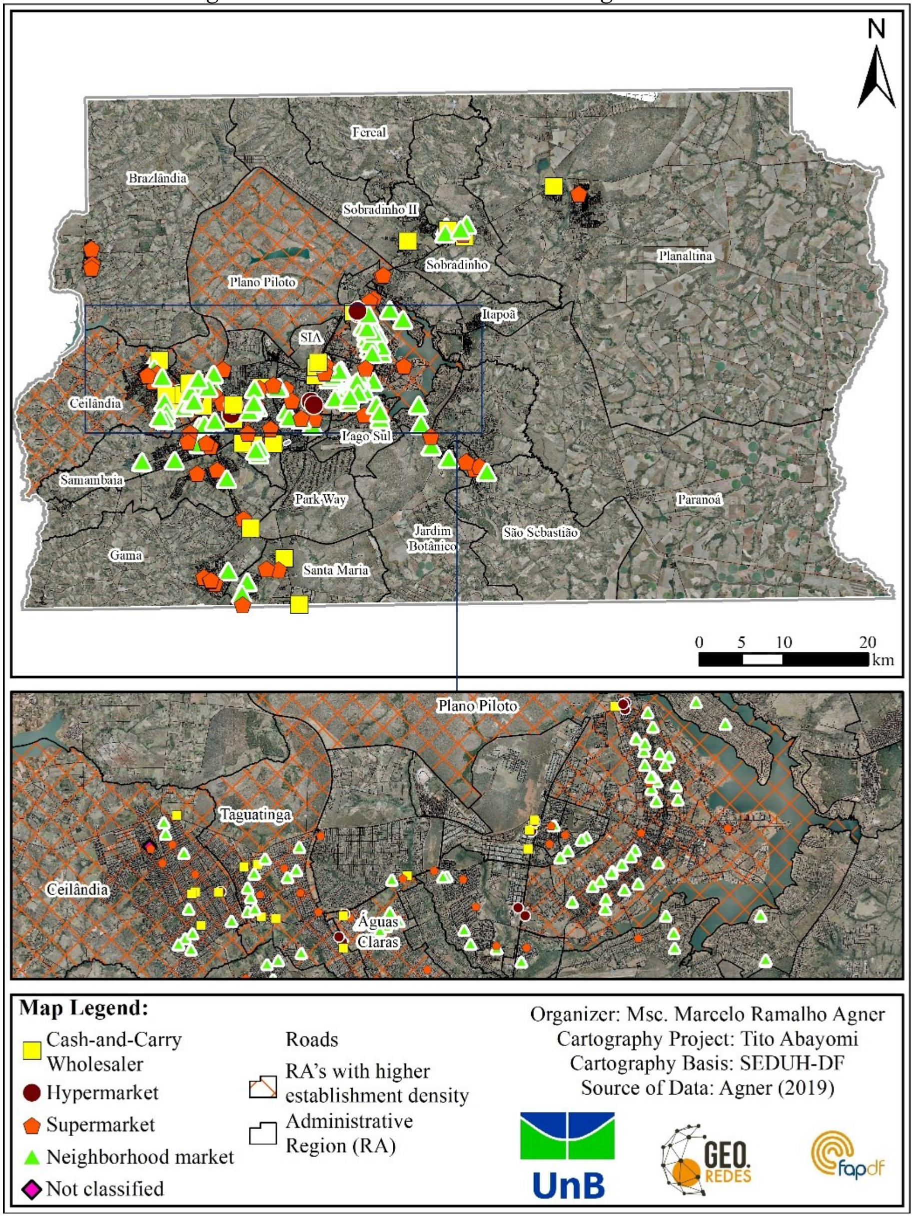
Conventional supermarkets have a larger quantity and mix of products. They have a sales area between 700 and 2,500 m², an average of 9,000 offered items, and five traditional sections (grocery, meat, fruits and vegetables, cold cuts and dairy products, non-food), and sometimes a bakery, with emphasis on hygiene and decoration products. Neighborhood supermarkets focus instead on food products and daily and weekly shopping (BORGES, 2001). Another important difference concerns the location of conventional supermarkets in malls and central avenues of commerce.

The format of hypermarkets generally has an average size of 2,500 m², but can reach up to 15,000 m² (SILVA, 2014). In these establishments, in addition to the sections found in supermarkets, there are also sections that cover electronics, bookstore items, furniture, and car products. The assortment mix is considerably larger than in conventional supermarkets, with the presence of 40 to 70 checkouts and other integrated services, such as food courts, pharmacies, etc.

The cash & carry format (*atacarejo* in Brazilian Portuguese) is characterized by the merger of wholesale (involving activities of resale or industry merchandise) with the retail self-service model. Baptista et al. (2012, p. 6) elaborate: "wholesale stores are, on average, 25% smaller than hypermarkets. The sales area of neighborhood stores is 46% that of supermarkets." The cash-and-carry format has gained great prominence in the retail sector in Brazil, with expressive numbers in terms of billing and growth in the number of commercial establishments. According to information from ABRAS (REVISTA SUPERHIPER, 2019), the cash-and-carry format was responsible for R$37.6 billion in sales in the year 2018.

After characterizing the different store formats, we proceeded to the classification of the establishments verified in the research and their location in Brasilia (Figure 3). Among the 191 establishments whose location was identified, 96 were neighborhood supermarkets; 56, conventional supermarkets; 28, cash-and-carry; and 11, hypermarkets.

Figure 3 - Establishment according to format



Source: elaborated by the authors (2020).

The number of neighborhood supermarkets is almost double that of the second-largest format – conventional supermarkets – due to the greater ease with which this format is inserted into the urban fabric considering its smaller size in terms of area and its lower rental costs, a smaller product mix, and less complex logistics. This fact, therefore, favors the participation of small local companies.

The high number of cash-and-carry wholesalers, greater than hypermarkets, helps confirm the recent trend in the retail sector of a greater participation of wholesalers as the preferred format for investments in the sector, with Brasilia following what has been occurring in other cities around the country.

However, the increase in the number of cash-and-carry wholesalers can only be understood in view of the economic crisis, since the growth of unemployment directly impacts the retraction in family consumption, with direct impacts on spending by the Brazilian population. Thus, the demand for cash-and-carry wholesalers, which occurs both in the middle class and in classes with lower purchasing power, reflects the need to reduce the weight of food expenses in the family budget.

The decrease in the cost of products through the gains from bulk sales and the lean operation format led consumers to see the cash-and-carry wholesalers as a possibility in the midst of the crisis. According to Super Hiper Magazine (2017), the cash-and-carry format was the only one that did not present a retraction in its sales in the period from 2010 to 2017.

The multinational capital sector was the one that most quickly adapted to the growting trend of cash-and-carry wholesale. Carrefour invested primarily in the Atacadão banner, acquiring 30 stores of the pioneer Dutch chain Makro. It is also relevant to point out that the Atacadão banner is the only one in the country to be present in all states and in the Distrito Federal, and is, therefore, the store with the largest territorial capillarity in food retail. GPA, in turn, seeks to expand Assaí, in addition to transforming some of the Extra-banner hypermarket establishments, as pointed out by Koike (2019). After the sale of its Walmart Brazil operations, the new controllers of the Advent group, in turn, chose to concentrate investments in the Sam's Club wholesale club stores (DESIDÉRIO, 2019).

In Brasilia, we observed this trend in the number of cash-and-carry establishments, in addition to the fact that some companies such as Dia a Dia, Super Adega, Atacadão, and Sam's Club did not operate in Brasília (or even exist) at the beginning of the last decade. This demonstrates the expansion and current importance of the format for the supermarket sector in the city.

Multinational chains' territorial capillarity is evidenced by their ownership of different banners, which operate in several formats such as neighborhood supermarkets, hypermarkets, and cash-and-carry wholesalers. Other companies, meanwhile, stick to only one type of format, either due to commercial strategy or financial limitations.

It becomes evident, therefore, that the most widespread strategy among the large chains is multi-format retailing, in which consumer service is present in establishments with different profiles integrated into the same chain. In Brazil, the chains Carrefour and Grupo Pão de Açúcar/Casino are the ones that compete for the most in all formats.

FINAL CONSIDERATIONS

One can locate the world's main retail chains in Brasilia, which demonstrates the importance of Brazil's capital as a consumer space in the globalized economy. In this sense, the research contributed to highlight the heterogeneity of the sector and the conformation of new commercial strategies adapted to the city's geographic reality, marked by structural socio-spatial inequality.

It was possible to confirm the chains' selective use of territory, especially by international capital. The power of the multinational companies is expressed not only in the number of existing establishments and their refined location strategy, but above all in their ability to offer different store formats. The regions with higher purchasing power, especially the Plano Piloto region, are the ones that register the greatest diversity of formats, such as neighborhood supermarkets, conventional supermarkets, hypermarkets and, more recently, the spread of cash-and-carry wholesalers.

Another factor that drew attention was the growth in the number of cash-and-carry wholesalers as the prioritized format in the investments made by local and multinational chains, conforming a national trend in the creation of establishments with lower operational costs, logistics efficiency, and a more aggressive final price policy consistent with the moment of economic crisis.

Research about the socio-spatial impacts of the advance of retail capital contributes, decisively, to a reflection on the importance of food commerce in the city. It is fitting to adopt a critical perspective regarding the power of commercial capital from the standpoint of both political and economic variables. Geography, in this way, offers invaluable analyses by directing its focus to the spatial strategies of market control from the urban, regional, and intra-urban contexts.

SOURCE FUNDING

Fundação de Apoio a Pesquisa do Distrito Federal – FAPDF. Edital de Demanda Espontânea

REFERENCES

AZEVEDO FILHO, G. L. S. **As grandes redes no setor supermercadista brasileiro e seus impactos na concorrência em Brasília**. 2016. 99f. Monograph (Bachelor's in Geography) – Institute of Human Sciences, University of Brasilia, Brasilia, 2016.

BAPTISTA, J. A. et al. Canais de distribuição Logístico Atacarejo: Um estudo de caso na empresa XYZ Dist. Com. Ind. Ltda. In: IX SIMPÓSIO DE EXCELÊNCIA EM GESTÃO E TECNOLOGIA, Rio de Janeiro, 2012, Anals,p.1-16.

BEZERRA, J. E.. **A fruticultura no Nordeste semiárido:** internacionalização, conflitos territoriais e a precarização do trabalho. 2012. 376p. Tese (Doutorado em Geografia) – Universidade Estadual Paulista, Presidente Prudente, 2012.

BORGES, A. R. **Marketing de Varejo**: as estratégias adotadas pelos supermercados de vizinhança para conquistar e fidelizar clientes. 2001. 155f. Dissertation (Master's in Production Engineering) – Technological Center, Federal University of Santa Catarina, Florianopolis, 2001.

CLEPS, G. D. G.. **Estratégias de reprodução do capital e as novas espacialidades urbanas**: o comércio de auto- serviço em Uberlândia – MG. Thesis (Doctorate in Geography) – Institute of Geosciences and Exact Sciences, São Paulo State University, Rio Claro, 2005.

CODEPLAN. Pesquisa Distrital por Amostra de Domicílios - PDAD. Available at: http://www.codeplan.df.gov.br/wp-content/uploads/2019/03/PDAD_DF-Grupo-de-Renda-compactado.pdf/. Accessed: 17 Apr. 2019.

CODEPLAN. Projeções Populacionais para as Regiões Administrativas do Distrito Federal 2010-2020. Available at: http://www.codeplan.df.gov.br/wp-content/uploads/2019/05/Sum%C3%A1rio-Executivo-Proje%C3%A7%C3%B5es-Populacionais.pdf. Accessed: 12 Apr. 2020

COE, N. M; WRIGLEY, Neil. Towards new economic geographies of retail globalization. In: CLARK, Gordon L., FELDMAN, Maryann P., GERTLER, Meric S., WOJCIK, Dariusz and KAISER, Angelika (eds.). **The New Oxford Handbook of Economic Geography**. Oxford: Oxford University Press, 2018. https://doi.org/10.1093/oxfordhb/9780198755609.013.37

COE, N. M. The internationalisation/globalisation of retailing: towards an economic-geographical research agenda. **Environment & Planning A**, v. 36, n. 9, p. 1571-1594, 2004. https://doi.org/10.1068/a36241

DELLOITE. **Global Powers of Retailing**, 2019. Available at: https://www2.deloitte.com/br/pt.html. Accessed: 10 Oct. 2019.

DESIDÉRIO, M. Sem Walmart, Sam's Club vira pilar do Grupo Big e ganha novas lojas. **Revista Exame**, São Paulo, set. 2019. Available at: https://exame.com/negocios/sem-walmart-sams-club-sera-pilar-para-crescimento-do-grupo-big/. Accessed: 12 Sep. 2019.

EXAME. Carrefour compra 30 lojas da rede Makro para acelerar atacadão. **Revista Exame**, São Paulo, Feb. 2020. Available at: https://exame.com/negocios/carrefour-compra-30-lojas-da-rede-makro-para-acelerar-atacadao/. Accessed: 5 Mar. 2020.

FARINA, E.; NUNES, R.; MONTEIRO, G. Supermarkets and Their Impacts on the Agrifood System of Brazil: The Competition among Retailers. **Agribusiness**, v. 21, n. 2, p. 133-47, 2005. https://doi.org/10.1002/agr.20039

FERREIRA, P. R. A. **O processo de globalização do varejo de massa e as lutas competitivas**: o caso do setor supermercadista no Brasil. 2013. 286f. Dissertation (Master's in Administration) – Instituto COPPEAD de Administração, Federal University of Rio de Janeiro, Rio de Janeiro, 2013.

HUMPHREY, J. The supermarket revolution in developing countries: tidal wave or tough competitive struggle? **Journal of Economic Geography**, v.7, n.4, p. 433–450, 2007. https://doi.org/10.1093/jeg/lbm008

Instituto Brasileiro de Geografia e Estatística (IBGE). **Projeções da população.** Rio de Janeiro: IBGE, 2018. Available at: https://www.ibge.gov.br/estatisticas/sociais/populacao/9109-projecao-da-populacao.html?=&t=resultados. Accessed: 02 nov. 2019.

KOIKE, B. Assaí ganhará 20 novas lojas em 2019 e mais três no começo de 2020. **Valor Econômico**, São Paulo, out. 2019. Available at: https://valor.globo.com/empresas/noticia/2019/10/31/assai-ganhara-11-novas-lojas-em-2019-e-mais-tres-no-comeco-de-2020.ghtml. Accessed: 05 Nov. 2019.

LAWRENCE, G.; BURCH, D. Understanding Supermarkets and Agri-food Supply chains. In: LAWRENCE, Geoffrey; BURCH, David. (Org.). **Supermarkets and Agri-food Supply Chains**: Transformations in the Production and Consumption of foods. London: Edward Elgar, 2007.

LAZZARINI, J. C. **A definição do sortimento-profundidade nos supermercados brasileiros: influência nas vendas e critérios utilizados**. 2012. 255f. Dissertation (Master's in Administration) – School of Economy, Administration and Accounting, University of São Paulo, São Paulo, 2012.

MARKETING, IPC. **IPC Maps**. São Paulo: IPC Marketing. 2012. v. 4. Available at:http://www.ipcbr.com/downpress/Release_IPCMaps_2020.pdf. Accessed: 02 Nov. 2020.

MINADEO, Ro.; CAMARGOS, M. A. Fusões e Aquisições no Varejo Alimentar: uma análise das estratégias de entrada e de crescimento do Carrefour e Wal-Mart no mercado brasileiro. **Revista de Ciências da Administração**, v. 11, p. 102-135, 2009. https://doi.org/10.5007/2175-8077.2009v11n24p102

OOESTERVEER, P.; SONNENFELD, D. A. **Food, Globalization and Sustainability**. London/New York: Earthscan, 2012.

OOSTERVEER, P.; GUIVANT, J. S.; SPPARGAREN, G. Alimentos verdes em supermercados globalizados: uma agenda teórico-metodológica. In: GUIVANT, Julia. S.; SPAARGAREN, Gert.; RIAL, Carmen. (Org.). **Novas práticas alimentares no mercado global**. Florianopolis: Editora da UFSC, 2010.

PAVIANI, A. Geografia urbana do Distrito Federal: evolução e tendências. **Espaço & Geografia**, Brasilia, v. 10, n.1, p. 1-22, 2007.

PINTAUDI, S. M. **Os supermercados na grande São Paulo**: contribuição ao estudo da transformação do comércio varejista de gêneros alimentícios nas grandes metrópoles. 1981. 105f. Dissertation (Master's in Geography) – Faculty of Philosophy, Languages and Literature, and Human Sciences, University of São Paulo, São Paulo, 1981.

REARDON, T.; BERDEGUÉ, J. A. The rapid rise of supermarkets in Latin America: challenges and opportunities for development. **Development Policy Review**,v. 20, n. 4, p. 371-388, 2002. https://doi.org/10.1111/1467-7679.00178

REVISTA SUPERHIPER. São Paulo: ABRAS. Ranking ABRAS. Maio, 2019. Available at: https://www.abras.com.br/superhiper/edicoes-anteriores/.Accessed: 10 Apr. 2019.

REVISTA SUPERHIPER. São Paulo: ABRAS. Os motores da economia voltam a funcionar. December, 2017. Available at: https://www.abras.com.br/superhiper/edicoes-anteriores/. Accessed: 10 Sep. 2019.

SERRENTINO, A. **Varejo e Brasil**: reflexões estratégicas. São Paulo: Varese, 2015.

SILVA, C. H. C. As grandes superfícies comerciais: os Hipermercados Carrefour no Brasil. **Espaço e Tempo**, São Paulo, n. 14, p. 89-106, 2003. https://doi.org/10.11606/issn.2179-0892.geousp.2003.123834

SILVA, C. H. C. Estudos sobre o comércio e o consumo na perspectiva da geografia urbana. **Geosul**, Florianopolis, v. 29, n. 58, p 149-178, Jul./Dec. 2014.

SILVA, I. V. I. **A dinâmica das redes supermercadistas em Taguatinga e sua relação com o território**. 2017. 78f. Monograph (Bachelor's in Geography) – Institute of Human Sciences/Geography Department, University of Brasilia, Brasilia, 2017.

WRIGLEY, N.; COE, N. M; CURRAH, A.. Globalizing retail: conceptualizing the distribution-based transnational corporation (TNC). **Progress in Human Geogrraphy**, v. 29, n. 4, p. 437-457, 2005. https://doi.org/10.1191/0309132505ph559oa

AUTHORS' CONTRIBUTION

Juscelino Eudâmidas Bezerra was responsible for the study design, acquisition of financial resources, supervision, methodology design, data selection and text writing. Marcelo Ramalho Agner collected and analyzed the data, carried out fieldwork, organized the cartographic material and wrote the text.