

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

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*This is an updated version of this report.*

**September 9<sup>th</sup>, 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 This figure is misleading and outdated and has been removed.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 21<sup>st</sup>, 2021** – Market share figures for poultry, beef, pork, groceries, and global pesticides and herbicides were updated to reflect more current data.

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# Introduction

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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.<sup>1</sup> Yet over the same period, the American food supply chain—from the seeds farmers plant<sup>2</sup> to the peanut butter in our neighborhood grocery stores<sup>3</sup>—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

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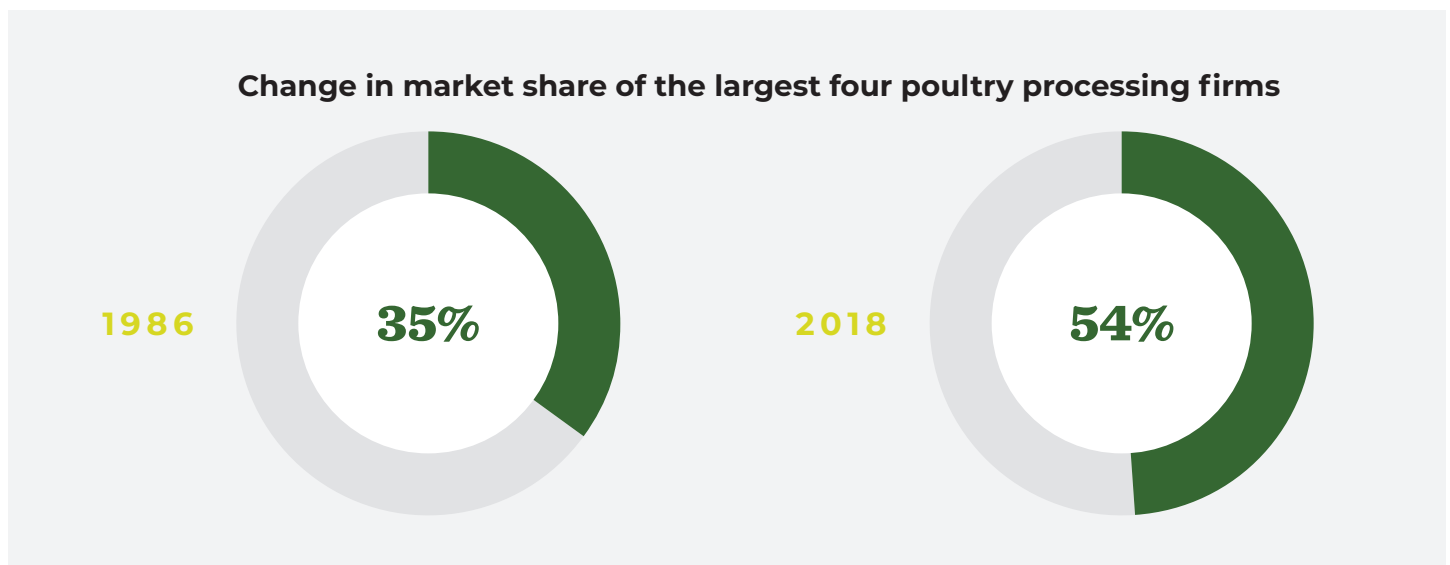
According to the USDA, agriculture and related industries contributed \$992 billion to U.S. GDP in 2015,<sup>4</sup> or 5.5 percent. Farm products contributed more than \$135 billion—about 1 percent of GDP—while direct on-farm work accounted for about 2.6 million jobs, or 1.3 percent of U.S. employment. 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.<sup>5</sup> In Iowa, up to about 30 percent of the state's economy is tied directly to agriculture and related industries.<sup>6</sup>

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 ten<sup>7</sup> of the nearly 9 billion chickens<sup>8</sup> 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.<sup>9</sup> The Small Business Administration Inspector General determined that the processing monopolies’ control is so extensive that farmers no longer qualify as independent businesses.<sup>10</sup> Half of chicken farmers work in regions dominated by only one or two processing monopolies,<sup>11</sup> 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.<sup>12</sup>

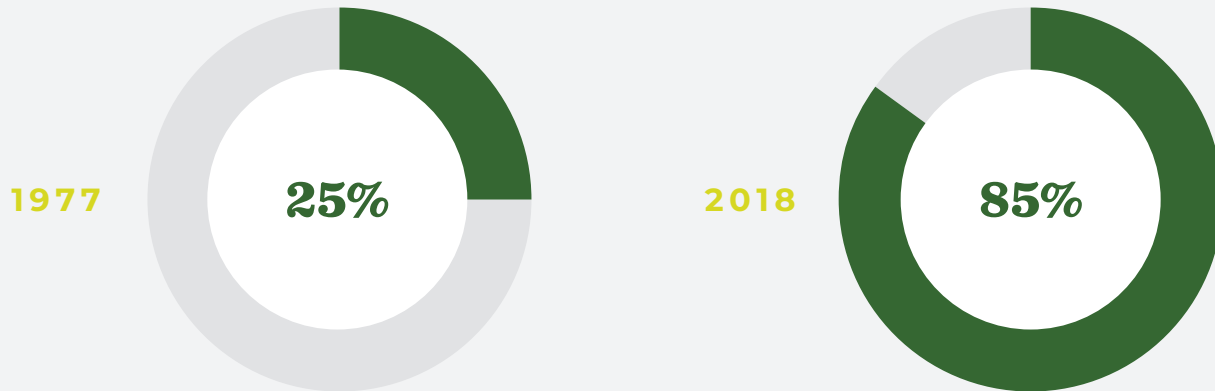


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**BEEF.** The cattle industry is the single largest segment of American agriculture by value, and roughly one-third of all farms in the US raise beef cattle.<sup>14</sup> As recently as the 1980s, the beef industry was a model of open, competitive 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.<sup>15</sup> Since 1980, an average of nearly 17,000 cattle ranchers have gone out of business every year.<sup>16</sup> Texas, Nebraska, Kansas, California, and Oklahoma raise 38 percent of all cattle in the US,<sup>17</sup> with Texas alone raising 13 percent.

Today, in many regions of the country, ranchers report finding as few as two buyers in a market,<sup>18</sup> 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 rising<sup>19</sup> and beef packers are making record margins.<sup>20</sup>

### Change in market share of the largest four beef packing firms



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**PORK.** In 1993, 87 percent of U.S. hogs were sold into competitive markets,<sup>22</sup> but today, that figure is less than seven percent.<sup>23</sup> By 2001, more than 8 in 10 hogs were controlled by packer conglomerates through long-term contracts with farmers or direct ownership.<sup>24</sup> Since the mid-1990s, 70 percent of U.S. hog farmers have gone out of business,<sup>25</sup> 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.<sup>26</sup>

### Change in market share of the largest four hog processing firms



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## MAJOR PLAYERS

**JBS S.A.** Based in Brazil, JBS S.A. is the world's largest meat packing company,<sup>28</sup> earning more than \$43 billion in revenue in 2017.<sup>29</sup> In 2007, JBS entered the U.S. market by acquiring Swift & Co., the third largest beef and pork processor at the time.<sup>30</sup> Since then, JBS has acquired Smithfield's beef business,<sup>31</sup> Cargill's pork business,<sup>32</sup> and America's second largest poultry processor,<sup>33</sup> Pilgrim's Pride.<sup>34</sup> 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.<sup>35</sup> 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.<sup>36</sup> In 2017, JBS was caught exporting rotten meat worldwide.<sup>37</sup> JBS spent \$408,000 on federal lobbying in 2018.<sup>38</sup>

**TYSON FOODS.** Arkansas-based Tyson Foods is the world's second largest meat packer,<sup>39</sup> after JBS S.A., and America's largest poultry corporation, generating \$40 billion in sales in 2018.<sup>40</sup> 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.<sup>41</sup> 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.<sup>42</sup> Tyson spent \$1.1 million on federal lobbying in 2018.<sup>43</sup>

**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.<sup>44</sup> 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.<sup>45</sup> In 2013, Chinese food processing conglomerate WH Group purchased Smithfield for nearly \$5 billion,<sup>46</sup> the largest-ever Chinese acquisition of a US company at the time. WH Group posted \$22.3 billion in revenue in 2017.<sup>47</sup>

## 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.

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## 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,<sup>54</sup> 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,<sup>55</sup> 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.<sup>56</sup> 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.<sup>57</sup>

## 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.<sup>58</sup> DFA handles 30 percent of the national raw milk supply with a far higher share in many regions,<sup>59</sup> 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.<sup>60</sup> 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.<sup>61</sup> 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.<sup>62</sup> DFA spent \$1.1 million on federal lobbying in 2018.<sup>63</sup>

**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.<sup>64</sup> The corporation, which posted \$7.8 billion in revenue in 2017,<sup>65</sup> 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.<sup>66</sup>

## 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.<sup>67</sup> 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.<sup>68</sup> Corn and soy yields have increased,<sup>69</sup> but at roughly the same rate yields had been increasing since the 1960s.<sup>70</sup>

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





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



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



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## 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.<sup>74</sup> 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.<sup>75</sup> Bayer's annual revenue was over \$44 billion in 2018.<sup>76</sup> In 2018, Bayer and Monsanto together spent \$13.4 million on federal lobbying.<sup>77</sup>

**DOWDUPONT.** Headquartered in Midland, Michigan, DowDupont was formed in 2017 after the two largest U.S. chemical manufacturers combined in a \$130 billion merger.<sup>78</sup> In the previous ten years, the two corporations had acquired over 40 seed and agrichemical companies.<sup>79</sup> 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.<sup>80</sup> 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.<sup>81</sup> Syngenta spent \$1.6 million on federal lobbying in 2018.<sup>82</sup>

**BASF.** German-based BASF, which brought in more than \$71 billion in annual revenue in 2018,<sup>83</sup> 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.<sup>84</sup> This includes Bayer's Liberty herbicide business, as well as various seed lines. BASF spent \$1.4 million on federal lobbying in 2018.<sup>85</sup>

## Farm Equipment

Today, two corporations manufacture nearly half of all tractors and other essential farm machinery in the US.<sup>86</sup> 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.<sup>87</sup>

### 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.<sup>88</sup> In 2018, John Deere posted \$37.4 billion in annual revenue.<sup>89</sup> 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.<sup>90</sup> John Deere spent \$1.6 million on federal lobbying in 2018.<sup>91</sup>

## 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.<sup>92</sup> 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.<sup>93</sup>

## 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.<sup>94</sup> “Middleman to the world,” Cargill is known as the world’s biggest food trading firm; its food processing and shipping network spans 70 countries<sup>95</sup> with a charter of 300 cargo ships,<sup>96</sup> 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.<sup>97</sup>

**ADM.** Archer Daniels Midland (ADM) runs 270 manufacturing facilities worldwide and serves over 170 countries, bringing in \$62 billion in net sales.<sup>98</sup> 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.<sup>99</sup> ADM spent \$2.2 million on federal lobbying in 2018.<sup>100</sup> Bunge spent \$360,000.<sup>101</sup>

**LOUIS DREYFUS.** Based in the Netherlands, this family-owned corporation controls about 10 percent of the world’s agricultural trade flow,<sup>102</sup> making them the third-largest food trader in the world. Louis Dreyfus made \$55.4 billion in revenue last year<sup>103</sup> and spent \$110,000 on federal lobbying.<sup>104</sup>

## 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.<sup>105</sup> By 2019, the top four chains sold 43 percent of all groceries,<sup>106</sup> with Walmart alone commanding a quarter of the market.<sup>107</sup> 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;<sup>108</sup> today those figures are 38 cents and 51 cents, respectively.<sup>109</sup> Grocery consolidation also puts smaller grocers out of business; competition from large national chains is the most commonly cited challenge facing rural grocery stores.<sup>110</sup> 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.<sup>111</sup> 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,<sup>112</sup> 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.<sup>113</sup> On average, communities lose on net 150 retail jobs after a Walmart opens.<sup>114</sup> In 37 metro areas, Walmart sells half of all groceries,<sup>115</sup> 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 1992<sup>116</sup>). Its annual global revenue topped \$500 billion dollars in 2018.<sup>117</sup> Walmart spent \$6 million on lobbying in 2018.<sup>118</sup>

**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."<sup>119</sup> Amazon spent \$14.4 million on federal lobbying in 2018.<sup>120</sup>

**KROGER.** Headquartered in Cincinnati, Ohio, Kroger is the second-largest food retailer after Walmart and the largest supermarket chain in the country,<sup>121</sup> 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.<sup>122</sup>

**AHOLD-DELHAIZE.** Headquartered in the Netherlands, Ahold-Delhaize's U.S. brands earned the company more than \$55 billion in revenue in 2018.<sup>123</sup> 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,<sup>124</sup> Kraft Heinz sells 60 percent of all ketchup, PepsiCo sells nearly 60 percent of all chips,<sup>125</sup> McCormick sells almost half of all spices,<sup>126</sup> 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.<sup>127</sup> 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.

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## 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.<sup>130</sup> 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.<sup>131</sup> Nestle has come under fire for price-fixing,<sup>132</sup> violating water rights in times of drought,<sup>133</sup> and aggressively marketing baby formula in developing countries.<sup>134</sup> Nestle spent \$1.5 million on federal lobbying in 2018.<sup>135</sup>

**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.<sup>136</sup> PepsiCo generated \$64 billion in net revenue<sup>137</sup> and spent \$3.47 million in federal lobbying in 2018.<sup>138</sup>

**KRAFT HEINZ.** Investors 3G Capital and Warren Buffet's Berkshire Hathaway orchestrated the merger of Kraft and Heinz in 2014,<sup>139</sup> creating the third largest food and beverage corporation in North America. Headquartered in Chicago, Kraft Heinz earned \$26 billion in net sales in 2018.<sup>140</sup> The conglomerate's portfolio spans Oscar Mayer, Capri Sun, Lunchables, Ore-Ida fries, Velveeta cheese, Planters nuts, and more.<sup>141</sup> Over 10,000 people lost their jobs as a result of the Kraft Heinz merger,<sup>142</sup> but four years later investors suggest "the merger has created no value," according to the Wall Street Journal.<sup>143</sup> Kraft Heinz spent \$920,000 on federal lobbying in 2018.<sup>144</sup>

## 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.<sup>145</sup> Three corporations control almost 80 percent of the market.<sup>146</sup> 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,<sup>147</sup> Kellogg's,<sup>148</sup> and PepsiCo,<sup>149</sup> 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.<sup>150</sup> 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.<sup>151</sup> In 2010, Sodexo paid the State of New York a \$20 million settlement for illegally overcharging New York City schools.<sup>152</sup> Sodexo spent \$300,000 on federal lobbying in 2018.<sup>153</sup>

**COMPASS GROUP.** Headquartered in the United Kingdom, Compass Group posted over \$30 billion in revenue in 2018.<sup>154</sup> 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.<sup>155</sup>

**ARAMARK.** Headquartered in Philadelphia, Aramark earned \$15 billion in revenue in 2018.<sup>156</sup>

# Solutions

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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,<sup>157</sup> 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 USDA<sup>158</sup> 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,<sup>159</sup> 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.<sup>160</sup> 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,”<sup>161</sup> 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.<sup>162</sup> 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.<sup>163</sup> 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.<sup>164</sup> 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.<sup>165</sup> 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.<sup>166</sup> 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 business<sup>167</sup> and did not post consistent profits until 2015,<sup>168</sup> 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.<sup>169</sup> 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.<sup>170</sup> 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.<sup>171</sup> 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

Open Markets' [Food & Power](#) Newsletters

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*Portions of this brief are excerpted from Food & Power, a publication of the Open Markets Institute.  
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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



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