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9月後半 (9/23-26)
(課員)
P29

THE RISK REPORT BY IAN BREMMER

Outsiders are shaking up Latin America's politics



GUATEMALA AND Ecuador held elections on Aug. 20; two small countries, but revealing some key trends in Latin American politics.

In Guatemala, the progressive anticorruption candidate Bernardo Arévalo won the presidential runoff in a landslide against the conservative former First Lady, Sandra Torres. In Ecuador, the right-wing populist businessman Daniel Noboa edged his way into an October runoff against former President Rafael Correa's chosen candidate, Luisa González, whom he is favored to defeat.

For starters, both Arévalo and Noboa are outsiders who were polling in the low single digits just weeks before overcoming establishment candidates in their respective first-round elections. This evinces strong voter frustration with the status quo in both countries.

Guatemala accelerated its slide toward authoritarianism when electoral authorities controlled by the ruling pact arbitrarily barred multiple change candidates from participating in the race, in an effort to protect the corrupt establishment's grip on power. That left voters with familiar faces such as three-time candidate Torres and two-time candidate Zury Ríos, the daughter of former dictator Efraín Ríos Montt. But Guatemalans rejected the government's efforts to shape the field by opting for Arévalo, the one remaining candidate with a strong antigraft message.

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Similarly, Ecuador's Noboa was able to benefit from voters' desire to break out of a polarized political climate defined by differing stances toward Correa. The former President, a left-wing strongman in the mold of Venezuela's Hugo Chávez, has loomed large over the political arena since leaving office in 2017 after 10 years in power. But nearly 46% of Ecuadoreans now believe the country should be run by someone who is

from the youth vote. In Guatemala, where 70% of the population is under the age of 35 and the average age is 26, Arévalo was able to capture significant youth support, particularly in the capital city and other urban centers where his transparency message resonated. Arévalo was also much more moderate on key social issues, offering a stark contrast to Torres' anti-gay and antiabortion platform and bolstering his appeal to younger voters. Meanwhile, in Ecuador, more than half of the electorate is under 40 and a quarter is under 30. At just 35 years old, Noboa was the youngest candidate in the field and would be the country's youngest-ever President if he wins in October.



Supporters celebrate Bernardo Arévalo's win in the presidential runoff in Guatemala City on Aug. 20

THE GROWING WEIGHT of the youth vote and simmering voter frustration with incumbents suggest that outsiders will prevail in other upcoming elections in the region like Argentina's, where libertarian anti-establishment upstart Javier Milei is in the

neither *correista* nor anti-*correista*, according to a recent survey from local pollster Comunicaliza. The shocking Aug. 9 assassination of anti-*correista* candidate Fernando Villavicencio led some voters to abandon González and look for a populist alternative. Noboa emerged as a contender because he is a political newcomer—albeit a well-known one as the son of Álvaro Noboa, a five-time presidential candidate and one of Ecuador's wealthiest men—who avoided attacking his opponents during the campaign.

Both candidates also benefited pole position to win the presidency later this year. Yet once in office, outsiders will face a steep uphill climb to actually govern. In Guatemala, the corrupt ruling pact—which controls all state institutions—is aggressively seeking to undermine Arévalo. Meanwhile, if Noboa wins, his National Democratic Action party will hold just 12 of the national assembly's 137 seats, and a challenging economic backdrop will leave him with limited resources to fulfill his promises to voters. The only certainty in Latin American politics is more uncertainty to come.

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JOHAN ORCONEZ—AFP/GETTY IMAGES

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JOHAN ORDOÑEZ - AP/GETTY IMAGES

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The View

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WORLD

THE DECAY OF IRAN

BY KARIM SADJADPOUR

This is about historical relationship between Iran and the world. That led to the today's deal (which hostage and new money deal - financial - government)
Bad economy and water mismanagement
-- no bright future the death of leader -
maybe until

The Islamic Republic of Iran has thus far proved too ideologically rigid to reform and too ruthless to collapse. As in the late stages of the Soviet Union, however, the foundations decay in plain sight. Outside their homeland, women of Iranian origin become world-class mathematicians and astronauts; inside Iran, the ruling clerics debate whether women should be allowed to ride bicycles. ▶

INSIDE

THE LESSON IN LATIN AMERICAN ELECTIONS

WHY HIS GOP RIVALS WORRY ABOUT VIVEK RAMASWAMY

SIMON SEBAG MONTEFIORE ON PUTIN AND PRIGOZHIN

One year ago this month, the regime's "morality police" detained and beat a 22-year-old woman—Mahsa Jina Amini—for allegedly showing too much hair beneath her compulsory veil. Her death in custody triggered Iran's longest antigovernment protests since the 1979 revolution that transformed the country from a U.S.-allied monarchy to an anti-American Islamist theocracy.

Supreme Leader Ali Khamenei managed these protests as he always does, by crushing dissent, dividing adversaries, and refusing to offer any concessions. Over 20,000 people were arrested and over 500 killed, including several who were executed. Compromising under pressure, Khamenei believes, only projects weakness and emboldens dissent.

For the U.S., Iran's internal political dynamics have a direct bearing on national security. Viewed from Washington, Tehran is the world's leading state sponsor of terrorism, is actively trying to assassinate former U.S. officials (to avenge the 2019 killing of Iranian general Qasem Soleimani), provides Vladimir Putin lethal drones in his war against Ukraine, and has taken more U.S. citizens hostage than any other country in the world. At least five—who have collectively spent two decades as hostages in Tehran's Evin prison—could soon be returned to the U.S., in return for the U.S. unfreezing at least \$6 billion in Iranian assets frozen in South Korea. There should be no illusions this deal will lead to a thaw in U.S.-Iran relations: senior Iranian officials—who publicly advocate hostage trading as an economic policy—have already announced the practice will continue.

A BIGGER CHALLENGE for the Biden Administration heading into election season is an advancing Iran nuclear program that could potentially trigger Israeli military action and skyrocketing oil prices. Five years after the Trump Administration withdrew from the 2015 Iran nuclear agreement signed by the Obama Administration, the CIA assesses that Tehran has the technical capacity to build nuclear weapons and is



Supreme Leader Ali Khamenei addresses Revolutionary Guards on Aug. 17

within weeks of having the fissile material to do so.

Going for a bomb, however, would be a risky move for Khamenei. Iran's nuclear sites have been thoroughly penetrated by Israel and the U.S., as evidenced by routine acts of sabotage reported at Iranian nuclear facilities and the assassination of top nuclear scientists. Khamenei's making the decision to weaponize also risks tilting the balance of power toward the Revolutionary Guards, who would likely control the nuclear codes (and aspire to control the country).

Successive U.S. administrations have sought to defuse Iran's nuclear program, and end the U.S.-Iran cold war, by either trying to engage the Iranian regime diplomatically or subjecting it to economic pressure in the hopes the regime will either capitulate or implode. None of these efforts has borne fruit. "Death to America" remains the Islamic Republic's enduring slogan.

But another pillar of the revolution is compulsory hijab. And a year after Amini's death, thousands of Iranian women defy these rules daily, despite the regime's use of Chinese facial-recognition technology to punish violations of laws of "hijab and chastity."

The country's economy is a shambles, and its former Minister of the Environment ominously warned that continued mismanagement of water resources could mean 50 million Iranians—70% of the country—"will have no choice but to leave the country." Climate scientists say parts of Iran (which this year reached temperatures of 152°F) could be the first places on earth too hot to be inhabited by humans.

After two decades of failure in Iraq and Afghanistan, and the disappointing outcomes of the 2011 Arab uprisings, the U.S. has little confidence that it can positively impact political outcomes in the Middle East. Indeed, absent a cohesive liberal opposition, an implosion of the Islamic Republic is less likely to be followed by an Iranian version of Jeffersonian democracy than by a military government.

For now, it remains a security state commanded by an octogenarian cleric who has held the title of Supreme Leader since 1989, before most Iranians were born. "Everyone is just waiting," a recent visitor from Tehran told me, "for the leader to die." ۹۰۳

Sadjadpour is a senior fellow at the Carnegie Endowment for International Peace

B6 The View includes reporting by Leslie Dickstein

IRAN SUPREME LEADER OFFICE HANDOUT/EPA EFE/SHUTTERSTOCK

ALI SAYYID, FATHER OF SIX, TRIES TO QUICKLY change direction when his children hear the sound of an ice cream truck coming down a New York City street. He can't afford it. "In Afghanistan, life was good and they were eating everything," says Sayyid, who was a civil engineer before the Taliban's 2021 takeover. He fled with his family first to Brazil and then across the southern border into the U.S., an epochal journey that landed him not only in a new land, but also in its politics.

Sayyid is among more than 100,000 migrants who have arrived in New York City over the past year. It's an influx that threatens to overwhelm the carrying capacity of a city that has made opening its arms to newcomers so fundamental to its identity (see: the Statue of Liberty) that Southern and Southwestern governors set out to test it—busing tens of thousands of newly arrived migrants from Texas, Florida, and Arizona to 42nd Street and Eighth Avenue, the Port Authority Bus Terminal.

"Never in my life have I had a problem that I did not see an ending to—I don't see an ending to this," Mayor Eric Adams told a gathering on Sept. 6. "This issue will destroy New York City."

In a nation of immigrants, New York may qualify as the capital. Almost 40% of its 8.4 million residents were born in another country. Two-thirds of the population in its five boroughs are either immigrants themselves or the children of immigrants. But the pace at which the recent migrants have arrived, deliberately intended to stress-test the safety net—and assumptions—of a Democratic stronghold, is unprecedented.

New York City's right-to-shelter law means officials cannot legally turn away anyone seeking shelter. But the city and state have been fighting in court over the best way to house the migrants: the city sued more than 30 New York counties for issuing emergency executive orders meant to ban the city from arranging asylum seekers to stay in private hotels in their jurisdictions. Sayyid is staying at the Roosevelt, which is a designated arrival center in addition to functioning as a shelter, but getting the space required waiting in line for 10 hours at a stretch for two days. He is so nervous about losing it that he asked that his name not be published; "Sayyid" is a pseudonym.

In June, as those shelters neared capacity, the city created 206 emergency shelters, including so-called respite centers in school gymnasiums and parking lots. Many are bare-bones spaces providing little more than cots and a few meals.

"The respite centers are at the bottom of the barrel,"

The Brief includes reporting by Olivia B. Waxman and Julia Zorthian

Testing a City of Immigrants (12/11/23)
By Sanya Mansook (12/3/23)
New York struggles to accommodate (accommodate) migrants from other states (2)

says Mammad Mahmoodi, co-founder of EV Loves NYC, a nonprofit focused on food insecurity. Because they are not permanent shelters, rules on cot spacing and the number of bathrooms per people can be overlooked, he says.

THEN THERE'S THE ICE CREAM TRUCK. Without jobs, the newcomers not only can't afford treats for their kids, they're also not going to be able to afford a place to live. So advocates, migrants, and New York politicians are increasingly focused on the kludgy process for getting federal work permits. Migrants need to wait 180 days, or six months, after filing for asylum to qualify for a work permit, and those requests are taking about two months to process, according to a Department of Homeland Security (DHS) official. "We need the federal government to allow asylum seekers to work, so they can provide for themselves and their families," said Adams. Governor Kathy Hochul has said something similar.

But the Biden Administration has recommended that New York improve its end of the process. The waiting period for work permits is meant to discourage misuse by those without credible asylum claims, and DHS notes that because the 180 days is written into statute, the agency does not have control over it—Congress does. Many on the other side of the issue argue that allowing migrants to work would incentivize crossing outside the legal process. Some migrants resort to working cash jobs in construction or delivery, but Sayyid says he won't; if the police found out, it could tank his asylum case. "I will not put my family at risk," he says.

A loose web of nonprofits and aid groups has developed to help migrants with everything from basic necessities like food, bedding, socks, and hygiene kits to legal advice. EV Loves NYC says it delivers about 2,000 meals across the city on Sundays. (Sayyid relies on the group for halal meals.) Power Malu, an organizer from the aid group Artists Athletes Activists, sets up every Friday at a church in midtown Manhattan, where volunteers—including city employees helping in their free time, Legal Aid attorneys, and bilingual English teachers—gather to address the gaps in caseworker and legal services.

But the issues of work and housing persist. On a recent Friday, three men from Mauritania wait at the church to connect with a volunteer attorney. Elkhilil Mohamed Selma, 24, says he has been staying at a respite center for almost two months. "The security talks with us like we are animals, says we are strangers in this country," Selma says. Every day, he and the other two men go try and find work; every day, they come back without a job. □

'The security talks with us like we are animals, says we are strangers in this country.'

—ELKHALIL MOHAMED SELMA,
MIGRANT FROM MAURITANIA



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ECONOMY

Small grocers are hurting. My buying habits don't help

BY ALANA SEMUELS

EVERY WEEK, I GO ONTO WALMART'S WEBSITE AND order a bunch of groceries to be delivered to my house, and then feel a little bit guilty.

By shopping at Walmart, I am likely contributing to the demise of the independently owned grocery store, which is disappearing across the country. But the prices make the choice easy. On a recent day, a 42-oz. tub of Quaker Oats was \$9.99 at Key Foods and \$5.68 at Walmart; a 500-ml bottle of California Olive Ranch olive oil was \$14.49 vs. \$8.37; and Rao's homemade tomato sauce was \$9.99 vs. \$6.88. These prices are one major reason Walmart captures 1 in 4 grocery dollars in America.

That may not last. These days, the U.S. government appears ready to listen to the argument that Walmart and other big chains including Dollar General, which is expanding at a rapid clip across the country, come by those prices unfairly because of their market power. There's a law on the books—1936's Robinson-Patman Act—that essentially says suppliers in any industry can't give lower prices and special deals to big chain stores if it costs the same to serve them as other stores. The law also says retailers can't bully suppliers into giving those discounts. But because Walmart and dollar stores are so huge, representing a big part of a supplier's business, they're able to extract deals and low prices from suppliers, according to Small Business Rising and the Main Street Competition Coalition, two groups of independent business owners making their case in congressional hearings and television ads. It's not just groceries; independent pharmacies, bookstores, auto-parts stores, and other types of retailers are also struggling on an uneven playing field, they say.

Walmart's leverage may seem like a good deal for consumers like me. In an era of runaway inflation, who doesn't want the lowest prices they can get? But the rise of Walmart does indeed contribute to the demise of independent stores, the grocers say. Since suppliers lose money by giving discounts to stores like Walmart, they increase the prices they charge to other stores, a phenomenon economists call the "waterbed effect." The higher-priced stores struggle, lose customers, and go out of business. Then the big-box stores, their dominance established and their competitors wiped out, raise prices. During the pandemic, that meant consumers living in lower-income areas far from big-box stores weren't able to get the groceries they needed. "Everyone deserves access to healthy foods and eating options," says Latisha Brunson, a councilwoman in Pine Bluff, Ark., where a grocery store closed in November 2022. Her ward does still have dollar stores with shelf-stable products,



A Walmart store in San Leandro, Calif., in August

but now residents can't shop for fresh food without a car.

Neither Walmart, Dollar General, nor Dollar Tree, which also owns Family Dollar, returned a request for comment.

FOR A LONG TIME, from when it was passed until the late 1960s, Robinson-Patman was "a prime enforcement priority" of the Federal Trade Commission, says John Kirkwood, an antitrust expert at Seattle University School of Law. But the field of antitrust underwent a populist revolution starting in the late 1960s and 1970s, in which academics, lawyers, and eventually judges decided it was more important to prioritize consumer welfare than small businesses. A 1969 report by Ralph Nader excoriated the FTC for protecting small businesses, arguing that doing so drove up prices for consumers.

In the wake of this populist push, the FTC and Justice Department slowed the pace of bringing Robinson-Patman cases. Those they did bring were less and less successful, until it became extremely difficult to win one, says Kirkwood, who was the lead counsel on one such case filed by the FTC, in 1988.

'There's no transparency whatsoever.'

—DAVID SMITH,
PRESIDENT, ASSOCIATED
WHOLESALE GROCERS



WHERE U.S. GROCERY DOLLARS ARE GOING

25%

Walmart

11%

Kroger

10%

Costco

7%

Albertsons

5%

Sam's Club

5%

Ahold Delhaize

5%

Publix

3%

Target

2%

Aldi

DATA SHOWN ARE FROM JUNE 2022—JUNE 2023 SOURCE: NUMERATOR

we think about what's good and bad for the U.S. shopper. For decades, the FTC and Justice Department have focused antitrust enforcement on protecting consumers from monopolies that can drive up prices, concluding that if shoppers are getting a good deal, there's no reason for the government to step in. Enforcing Robinson-Patman means the government would focus less on whether I'm getting a good deal on groceries and more on whether the fabric of my community is better off with the status quo: the biggest grocery stores and box stores aren't evenly distributed around the country—they tend to be clumped in more affluent, suburban areas, says Bedoya.

Rural and urban areas are disproportionately served by independent grocers, and they go out of business when dollar and big-box stores come in and undercut those grocers on price. A Walmart located in the suburbs, even if it's just eight or nine miles from a center city, is not a good solution for neighborhoods where people don't have cars or access to consistent public transit.

"What you're left with is some of the poorest people in the country, some of the people in the most underserved areas, are left without a place to buy fresh groceries or just groceries, period," Bedoya says.

OF COURSE, IT MAKES some sense today that Walmart would get lower prices from a cereal company or juice seller. It's ordering huge amounts of product, and that sheer volume creates efficiencies that arguably save suppliers money. But the grocers are arguing that Walmart and big boxes aren't actually creating efficiencies—while still using their size to extract deals.

Instead of waiting for the FTC to act, many independent grocers have banded together into cooperatives so they'll have more bargaining power. Those giant co-ops buy billions of dollars of groceries and have warehouses all around the country, just like Walmart does. Associated Wholesale Grocers, for instance, is a food co-op that serves 3,400 member supermarkets, representing \$24 billion in sales. By contrast, there are 4,631 Walmarts in the U.S. AWG buys goods by the truckload rather than the case, so a supplier sends a truck to its warehouse in the same way it would send a truck to Walmart, says David Smith, AWG's president and chief executive officer.

Smith, who grew up in the grocery business, says that back in the 1970s, when Robinson-Patman was enforced, suppliers would issue rate cards to tell grocery stores how much an item cost. The amount on the card depended on how much the stores bought: a case, a pallet, and a full truckload of a product would all have different rates. But after three decades of Walmart growing and gaining market power, he says, now "there's no transparency whatsoever. And what's happening is efficiency is being surpassed by leverage."

Walmart now accounts for 25% of all groceries purchased, compared with around 10% at competitors like Kroger and Costco, says Jason Goldberg, chief commerce strategy officer at Publicis Group. According to AWG, its stores average about 35,000 sq. ft.; the average Walmart is

But today, the argument that big chains need to be reined in is regaining traction with the FTC. Under Chair Lina Khan, appointed in 2021, the FTC has embarked on an aggressive path of antitrust enforcement; in March, Khan said that the agency wanted to bring more cases under the law "in short order." Meanwhile, FTC Commissioner Alvaro Bedoya has embarked on a national listening tour, meeting with independent grocery stores and pharmacy operators and talking about how Robinson-Patman enforcement could help them thrive.

"I do think that the corporate power in this country is such that slowly, folks—no matter what their politics are—are starting to say this is too much," Bedoya told a room of people in July as he visited Oasis, an independent grocery store that opened in 2021 in North Tulsa, Okla., after the city passed an ordinance limiting the proliferation of dollar stores. "My hope is that five or 10 or 15 years from now, there will be bipartisan agreement that we need to work harder to protect small businesses like Oasis."

That government officials are standing up for independent businesses represents a sea change in how



around 110,000 sq. ft., says Goldberg, so the latter inevitably buys more product overall—leading to better prices offered to the bigger buyers.

Indeed, suppliers haven't issued list prices to retailers in decades, Goldberg says; instead, they sit down with retailers and negotiate prices along with joint marketing spending and product placement. Deals are very hard to compare because they have so many moving parts, but one thing is for sure: "The retailers with the least leverage are going to pay the most," he says, "and the biggest retailers with the most leverage are going to pay the least."

The grocers say the discounts Walmart gets are not commensurate with the efficiencies the company creates. Many store owners have experiences like that of R.F. Buche, who owns 23 independent grocery, convenience, and hardware stores in South Dakota. He will sometimes walk into a Walmart and see lower prices on the shelves than he can get wholesale through AWG. In December, for instance, Walmart was selling a dozen eggs for \$2.27 when he was buying them for \$3; Walmart was selling iceberg lettuce for \$1.88 a head when he was getting it for \$4.46. "My customers just don't understand when they look at my shelf price and Walmart's shelf price," says Buche. He's had to sell three stores since 2019 because it was impossible to keep them afloat.

Suppliers' allegiance to Walmart solidified during the pandemic, say Buche and other grocers. Because Walmart makes up such a big share of a supplier's business, they could demand on-time delivery even during the pandemic, when everything was running late. In September 2020, Walmart told suppliers they needed to be making on-time and in-full shipments 98% of the time or face steep fines; as a result, suppliers shifted whatever they had available to Walmart. Buche and independent grocers, on the other hand, couldn't get the items their customers needed, and so their customers switched over to the big-box stores.

Suppliers mince no words explaining how dependent

A man climbs into the fridge for milk at a Walmart in Rosemead, Calif., last November

'Everyone deserves access to healthy foods.'

—LATISHA BRUNSON,
PINE BLUFF, ARK.,
COUNCILWOMAN

they are on Walmart; in regulatory filings, giants like Kraft Heinz and Nestlé mention Walmart by name, explaining that consolidation in grocery has led to retailers with increased purchasing power, and that those retailers can demand lower pricing and more favorable terms.

THERE ARE INDUSTRY WATCHERS who say enforcement of Robinson-Patman would result in higher prices for consumers. By enforcing the law, said former FTC Commissioner Joshua Wright at a Cato Institute event in 2022, the government would not be prioritizing consumer welfare, but would be instead just assuming that "big is bad."

That is a real question for consumers: whether the FTC's enforcement of Robinson-Patman could drive prices up. Economists are still divided; some studies show enforcement would drive up prices, others suggest it wouldn't. If the FTC can somehow prove that enforcement won't raise consumer costs, and will instead create a country with big chain stores and small independents with similar prices, it may have a fighting chance at restarting enforcement after more than 30 years. But it's going to be an uphill battle.

Any cases filed under Robinson-Patman will likely eventually end up in appeals courts and maybe even the Supreme Court, and both are likely to take a dim view of it because they are so conservative, says Kirkwood. "You'd have to go up against these judges [who think] it's the left-wing FTC trying to revive the Robinson-Patman Act," he says.

I like the idea of shopping at the independents after all, but my pocketbook vastly prefers the cheap prices at Walmart. I suppose I should be willing to pay a little more so that Americans living far from a big-box store can also get fresh groceries, but it's hard to volunteer to pay higher prices on behalf of an unknown fellow citizen. In the meantime, Walmart is gaining even more leverage when people like me decide to shop there, making the independents' fight for equal prices even harder. □