

## The Miracle of the Grocery Store

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In 1989, a young Russian woman [Lena Larinov] moved to North America. Born and raised in the Soviet Union, she was accustomed to shortages of all kinds. The wife of a Russian hockey player, she was stunned at the selection and quantity of available food at the local supermarket. According to the Los Angeles Times, she immediately started filling up her shopping cart with meat as she was worried that the product would soon run out. Her friend, also originally from Russia, intervened and assured her that, unlike the Soviet Union, food products are available every day.

We are all familiar with the supermarket with its endless abundance that the young Russian woman visited. The supermarket is where the consumer rules on the one hand, while the same consumer is manipulated and persuaded to buy on the other hand. The supermarket provides a peek into our collective needs and wants. “The grocery store is [not only] the keeper of our food, without which we don’t survive...these grocery stores reflect our culture.”

The grocery supermarket has evolved over generations from general stores and trading posts to neighborhood Mom and Pop stores and eventually to modern supermarkets. The journey of these grocery stores followed the trends of our times including the exodus of families moving from farms to cities to the suburbs. Retail grocery chains proliferated as modern highways were built along with the rise of automobile ownership resulting in the demise of the neighborhood grocery stores and the rise of the supermarket.

Technology powered the changes of the food delivery system along the way including the invention of the fluted corrugated cardboard box, which was originally designed to give structure to men’s hats and the development of the flat-bottomed bag, which matured after Civil War cotton shortages. These two inventions were revolutions and changed modern life in general and shopping in particular. These developments prompted the shift to packaged food, which continues to this current day

In early 20<sup>th</sup> century, neighborhood grocery stores proliferated in cities and towns. Locally, it was reported that Oshkosh had over 100 local grocery stores as recently as in the 1930s. Appleton had many grocery stores along College Avenue. Basically, every neighborhood had a grocery store, a bakery and a tavern, many along ethnic lines where the patrons could converse in their native language. The neighborhood stores supported a time when households had one car if they had an automobile. If the husband had the car for work, women shoppers would have to carry goods home. Local stores and home delivery flourished in these early times.

In 1916, Clarence Saunders had an idea, an idea inspired by the novelty of the cafeteria restaurant. He designed a grocery store where customers would walk the aisles, to touch and select the product themselves and pay on the way out. This was the start of the modern retail grocery store – consumers touching the goods – the start of self-service. It occurred to him after watching piglets run through a trough that the piglets were like his customers walking the aisles and heading to the cashier. He named his store Piggly Wiggly.

In 1930, the first true supermarket was King Kullen in Queens, coinciding with the use of refrigeration. King Kullen moved their stores off the main streets where rent was steep and where parking was scarce. Their first store was three thousand feet, which was considered large at the time.

Then came the surge of the one-stop grocery chains such as the great Atlantic and Pacific (A&P) company, who introduced fresh baked bread, health-food, fresh flowers, etc. Kroger, Safeway and many others followed, continuing with a modest store footprint compared to today. These regional and national chains simply pushed out the local neighborhood stores. Michael Ruhlman in his book *Grocery* reports that by 1956 “independent grocery was gone.” Locally, the Post-Crescent reported that regional grocer Krambo ‘merged with Kroger in 1955 and dropped the name Krambo in 1970.

Technology improvements continued. In 1928, a Columbus shopping center was built with a dedicated parking lot, which was a novel change at the time. In 1937, the shopping cart was invented. At first, shills were hired to push the carts to show reluctant users how the carts would work. In 1947, the same inventor invented the child seat. *On a side note, Pediatrics magazine reports that 24,000 children were injured in shopping cart accidents in 2006.*

In 1970, the Kroger chain (owner of local Pick n Save markets) expanded and disbanded the old (and smaller) grocery store model. They enlarged their stores off downtown, a trend that continues to this day – think Woodman’s. Kroger-surpassed the A&P company who held on to the smaller store model. A&P was slow to change and eventually went out of business.

In 1970, the same year the microwave market exploded, Trader Joe’s was started by a man named Joe Coulombe. Coulombe built his food store model based on the correlation between the increase in education (after WWII), increase in travel (air travel) and alcohol. Benjamin Lorr in his book *The Secret Life of Groceries* reports that Coulombe understood that “the correlation between education and alcohol consumption is about as perfect as one can find in marketing.” As a result, Trader Joe’s, with a smaller format, continues to be noted for their cheap wine and alcohol selection.

Furthermore, Trader Joe’s adopted hippie lingo, sold raw milk to accommodate fitness fanatics, the same demographic as his alcohol consumers. In short, his customers reflected their identity on the products they bought and became loyal following for their healthy goods and spirits. The first Trader Joe store promoted 100 brands of scotch. Kroger, Safeway, Wegmans and Costco [and other chains] all have programs built on the Trader Joe concept.

Then came Walmart and Costco, big competition for the traditional retail grocers. Walmart became the largest food grocer on the first day in food operation in 1988 and continues to be the largest grocer in the world today. In the 1960’s, Lorr reports that the supermarket “was no longer a sensation, simply an institution.”

After World War II, a shift occurred with women entering the workplace spurring the breakfast cereal boom. Although men started cooking. Julia Belluz, a NYT opinion writer, reminds us that buying and cooking food is “still shouldered overwhelmingly by women”, many who work outside the home, which results in less cooking and more of assembling our meals. In short, we have gone from cooking our meals to assembling, and now often relying on grocery stores to make the meal. We pick up the meals on our way home in the store parking lot or have the meal delivered.

Lorr says “retail is a giant reflection of society, what people are thinking and wanting. “There was a time when people mostly ate what was in season and grown locally. Today, we crave

bananas year-round, and with the use of synthetic ethylene gas, South American bananas are timed to ripen in our pantries. We buy tomatoes that bounce like a ball. We eat soggy apples in the wintertime.

Why do we buy? Michael Ruhlman, in his book *Grocery*, says the ‘consumer rules.’ Marketers learn about our habits, where we live, what cars we drive, what are our fears. Paco Underhill in his book *Why We Buy* reports that consumer tracking is an established science through loyalty programs, electronic transactions, data mining, and so on. Lindstrom reports that grocery chains including Kroger can already tell if you are near or inside a store and send you offers or coupons on your smart phone.

Furthermore, children and seniors buy the most pet treats, so the grocers place these products on the lower shelves. More expensive goods are placed at eye level. Milk is at the back of the store. Produce in the front because it makes us happy. Veggies are misted. Consumers don’t like to be ‘brushed’ so they keep the aisles wide. Music at 108 beats per minute increases sales 38.2%. Consumers spend more on counterclockwise floor plans. Supposedly it is easier to reach the food with our right hand.

Grocers know that the consumer is influenced by color. Color increases brand recognition and we prefer colorful food and colorful packaging. Consumer Good Companies (CGCs) use synthetic dyes to color our food. For example, the more yellow egg yolk appears will increase sales, so farmers add dye to chicken food to color the yolk. The grocer gets the sale.

Ruhlman quotes Rebecca Rupp from National Geographic in his book *Grocery*. Rupp writes, “Grocery shopping is a cunningly orchestrated process. Every feature of the store from the floor plan and shelf layout to the lighting, music and ladies in aprons offering free sausages on sticks is designed to lure us in and keep us there and seduce us into spending money.” For example, Target, who ranks seventh in food and beverage sales in the U.S., recently adopted a new directive mandating workers to smile and make eye contact with shoppers within 10 feet.

We obsess over health. For instance, whether eggs are good or bad for us has evolved over the years. Health trends include Paleo, fat-free, organic, grass fed, natural, gluten free, and so on. The upshot is that many of us don’t know what these terms mean. Natural, for instance, is the unregulated world. Martin Lindstrom in his book *Brandwashed* reports that “selling health (or

the illusion of health) is hugely profitable.” Why does an overweight nation demand low fat, low sugar? Why do we repeat the mantra that “breakfast is the most important meal of the day”, a marketing slogan dreamed up by Dr. John Kellogg in 1917, who wanted us to buy his “healthy” cereals. Grocers follow these trends and monitor our actions continuously.

A big change from the past is that grocers strive to carry everything to accommodate their customers- basically “endless abundance”. The biggest predictor of consumer satisfaction is availability. That is why the cashier asks if you found everything you wanted during check-out. As a result, the average supermarket has 32,000 items; the largest (think Woodman’s perhaps) has approximately 120,000 items. There are 40-plus varieties of Oreo cookies and 300 types of yogurts. There is Heinz mustard and French’s ketchup. You can buy fat-free half-and-half milk.

Of course there are problems. 42 million Americans (12.3% of U.S. residents)-receive food assistance each year at a cost of \$100 billion. CNN reports that people are buying groceries for their neighbors as food availability challenges increase. Food deserts (Menasha) exist. The EPA reports food waste to the tune of 66 million tons of food waste each year in the U.S. Milk and alcohol regulations are complicated.

On the other hand, we have come a long way economically. In 1900, families spent 40% of their family budget on food; today 10% of the home budget. Lorr reports we spend less money on food than other countries. Significantly, shopping has become less of a burden.

The current [Trump] administration is influencing changes to our food supply. For instance, Tyson has agreed to drop high-fructose corn syrup. Likewise, Walmart is removing synthetic dyes and artificial sweeteners. Kraft and Smucker’s plan to remove artificial colors. Coke is planning to use sugar in some of their soda products. In the same manner, we’ll continue to argue how best to define terms such as meat or milk and debate the merits of test-tube patties and tofu. The outcomes of these various initiatives will flow through the grocery store on the way to our homes. Keep in mind that grocers will pull any product that does not meet their sales expectations.

Food delivery will continue to increase. The combination of technologies including ride sharing, online food ordering and delivery will continue to expand. For instance, Kroger and Door Dash combine for on-demand delivery. DoorDash has also partnered with Google-backed Waymo, the

driverless vehicle company. Walmart continues to rule the food and beverage segment and recently reported that they can deliver groceries to 94% of U.S. households in three hours or less.

These future trends will be heavily influenced by Generation X, the sandwich generation. Their global collective spending power second to U.S. and twice the size of China's total spending. (\$5 T is 2025 global spending). Gen X has the financial burden of handling the finances of three households including their children and their Boomer parents. Unlike boomers who preplan, Gen Xers shop backwards and wait until they are hungry to order or buy groceries.

A likely scenario for future generations will be the consumer ordering online, a self-driving car arrives at your house, and you use your mobile phone to open the trunk and remove the groceries. In the same manner, drones will eventually be used for home food delivery.

Other trends include Amazon, who owns Whole Foods, will continue to move into the trillion-dollar U.S. food market. Amazon has a store in Pennsylvania where the aisles are stocked with "healthy" goods. The upshot is the shopper, while in the store, can use an app to order Pepsi or Twinkies and other "unhealthy" goods, which are stored in the back, and will be delivered by a robot as the consumer departs the store. The Wall Street Journal calls this the Amazonification of Whole Foods.

Technology changes include robots in the stores and electronic shelf labels (ESLs) that enable dynamic pricing, that is updating prices depending on demand. Variable electronic pricing is probably not far away for us in the Fox Valley of Wisconsin.

There is a Hy Vee grocery store in Ashwaubenon, Wisconsin. In the physical store, there is a Starbucks, a pharmacy, a food court, and a toy store. There are frequent pop-up activities depending on the season and of course holiday music. It is basically a small mall within a grocery store. As food delivery expands, grocers will continue to adopt in-store activities to engage the consumer.

The miracle of the modern supermarkets is based on "endless abundance." On the one hand, industry uses the full range of psychological tricks and traps to persuade us to buy, On the other hand, these stores reflect our culture, what we care about and what we fear and what we desire.

The modern supermarket is “no longer a sensation.” Sensation or not, we depend on these stores to feed us. We are no different than the Russian woman who wanted to buy all the meat. Like her, we also need and want our groceries.

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### **Selected References**

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## **The Miracle of the Grocery Store - Addendum**

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### **Grocery technology timeline**

1809 First food canning method invented – France

1831 Platform scale was invented

1852 Paper bag invented (due to Civil War era cotton shortage)

1865 The fluted cardboard box came about to give structure to men's hats

1887 – First retail coupon (Coke)

1890 Easy to fold boxes - connects the producer and retailer

1896 – S&H green stamps

1900 Packaged food is responsible of one-fifth of all manufacturing in the U.S.

1903 Glass bottle machine developed

1927 Refrigeration became mainstream

1930 First supermarket – King Kullen

1937 Invention of the shopping cart

1939 U.S. food stamp program begins – Rochester, NY (SNAP)

1946 Increase in processed foods (after WWII)

1970 Microwave market explodes

1970 Rapid growth and innovation in junk food market (Kroger)

1974 First use of real-life barcode technology – Ohio

1990 Start using electronic self-service kiosks

Emerging – Electronic shelf labels, delivery apps, drone delivery.

### **Top items sold at Costco:**

1 Bath tissue

2 Paper towels

3 Bottled water

4 Diapers

5 Large eggs

### **Early brands**

1780 Bakers Chocolate

1824 Cadbury

1867 Nestle

1868 Tabasco

1869 Heinz

1869 Campbell's Soup

1877 Quaker Oats

1900 Del Monte (Coffee)



