Mercator, Fortaleza, v. 24, e24029, 2025 ISSN:1984-2201

URBAN AND REGIONAL DYNAMICS OF CASH AND CARRY EXPANSION IN BRAZIL

https://doi.org/10.4215/rm2025.e24029

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Article history:
Received 16 June, 2025
Accepted 29 October, 2025
Published 10 December, 2025

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ARTICLE

Abstract

In the last two decades, the rise of the cash and carry format as the primary marketing channel in urban centers has been the most significant transformation in Brazilian food retail. Cash and carry represents a hybrid business model that combines wholesale and retail activities, serving small traders and end consumers. This research aims to analyze the expansion of this format in the country, relating it to urban and regional dynamics. The methodological approach considered the territorial topology of cash and carry networks, with data on main business groups, number of stores, and geographical distribution. The expansion of the cash-and-carry was analyzed considering the IBGE's urban hierarchy ranking, based on the Regions of Influence of Cities (REGIC) survey. The results reveal that cash and carry has consolidated as a major commercial phenomenon, with turnover exceeding R$ 300 billion in 2023. The format presents the highest penetration rate in Brazilian households (72%), with 23% growth in number of stores between 2013 and 2023. The study concludes that there is strong concentration in the opening of new stores in metropolises and regional capitals, evidencing selective spatial strategies that articulate territorial capillarity and adaptation to different urban contexts.

Keywords: Cash-and-Carry; Consumption; Commerce; Urban Space; Regionalization.

Resumo / Resumen

DINÂMICA URBANA E REGIONAL DA EXPANSÃO DOS ATACAREJOS NO BRASIL

Nas duas últimas décadas, o fortalecimento do formato atacarejo como principal canal de comercialização nos centros urbanos foi a principal transformação no varejo alimentício brasileiro. O atacarejo é um formato híbrido que concentra atividades de venda para atacadistas e varejistas, atendendo a pequenos comerciantes e ao consumidor final. O objetivo desta pesquisa é analisar a expansão desse formato no país, relacionando à dinâmica urbana e regional. A metodologia adotada considerou a topologia territorial das redes de atacarejo, com dados sobre os principais grupos empresariais, número de lojas e distribuição geográfica. A expansão do setor de atacarejo foi analisada à luz da classificação da hierarquia urbana do IBGE, a partir da pesquisa Regiões de Influência das Cidades (REGIC). Os resultados revelam que o atacarejo se consolidou como fenômeno comercial de grande relevância com faturamento superior a R$ 300 bilhões em 2023. O formato apresenta a maior taxa de penetração nos lares brasileiros (72%), com crescimento de 23% no número de lojas entre 2013 e 2023. O estudo conclui que há uma forte concentração na abertura de novas lojas nas metrópoles e capitais regionais, evidenciando estratégias espaciais seletivas que articulam capilaridade territorial e adaptação aos diferentes contextos urbanos e regionais.

Palavras-chave: Atacarejo; Consumo; Comércio; Espaço Urbano; Regionalização.

DINÁMICA URBANA Y REGIONAL DE LA EXPANSIÓN DE LOS ATACAREJOS EN BRASIL

En las dos últimas décadas, el fortalecimiento del formato cash and carry como principal canal de comercialización en los centros urbanos fue la principal transformación en el comercio minorista de alimentos brasileño. El cash and carry es un formato híbrido que concentra actividades de venta para mayoristas y minoristas, atendiendo a pequeños comerciantes y al consumidor final. El objetivo de esta investigación es analizar la expansión de este formato en el país, relacionándolo con la dinámica urbana y regional. La metodología adoptada consideró la topología territorial de las redes de cash and carry, con datos sobre los principales grupos empresariales, número de tiendas y distribución geográfica. La expansión del sector de cash and carry fue analizada a la luz de la clasificación de la jerarquía urbana del IBGE, a partir de la investigación Regiones de Influencia de las Ciudades (REGIC). Los resultados revelan que el atacarejo se consolidó como fenómeno comercial de grande relevancia, con facturación superior a R$ 300 mil millones en 2023. El formato presenta la mayor tasa de penetración en los hogares brasileños (72%), con crecimiento de 23% en el número de tiendas entre 2013 y 2023. El estudio concluye que hay una fuerte concentración en la apertura de nuevas tiendas en metrópolis y capitales regionales, evidenciando estrategias espaciales selectivas que articulan capilaridad territorial y adaptación a los diferentes contextos urbanos.

Palabras-clave: Cash and Carry; Consumo; Comercio; Espacio Urbano; Regionalización.

INTRODUCTION

The self-service food retail sector in Brazil has been undergoing several transformations, requiring special attention to the dynamics of the actors and processes involved. Understanding the relationship between trade and food consumption in contemporary society from a geographical perspective is essential for discussing agri-food systems and their relationship with the urban environment. This approach should encompass issues such as access to food (barriers, obstacles, availability, formation of food swamps and deserts), supply and marketing channels according to the urban network pattern, and city-countryside interaction based on the relationship between producers, suppliers, and consumers.

The most recent attention to self-service food retail, generically represented by supermarkets, is due to the centrality that this channel has acquired in parallel with the urbanization process of the territory (SANTOS, 2005). Our research on the geography of self-service food retail in Brazil indicates that the layout of different store formats/types is a key variable in the strategy of retail capital, especially large corporations, particularly multinationals (AGNER, 2019, 2024; IVES DA SILVA, 2023; BEZERRA, 2020, 2023).

The main purpose of this strategy is to adapt to the spatial context in which stores are located, aiming to increase profit margins in the sector. This process articulates territorial capillarity and spatial proximity to different consumer profiles, focusing on factors such as income, population distribution, consumption potential, and commercial flow patterns. Ultimately, these processes reveal how retail contributes to the production of new commercial spatialities (SALGUEIRO; CACHINHO, 2009; SOUMAGNE, 2013; PINTAUDI, 1999).

Retail dynamics can be analyzed in three dimensions: economic, spatial, and cultural. Economically, chains adjust to factors such as inflation, interest rates, fiscal policies, employment and income, operating costs, and relationships with suppliers (SERRENTINO, 2015; WRIGLEY; COE; CURRAH, 2005). In the spatial dimension, the specificity of each location, urbanization rate, land value, mobility, new centralities, and logistics development are considered (AGNER, 2019, 2024; CLEPS, 2005; COSTA DA SILVA, 2005; DICKEN, 2011; GOMES, 2022; RODRÍGUEZ, 2023; SILVA, 2022; WINTER, 2003). In the cultural dimension, changes in consumer society, eating habits, audience segmentation, and new forms of consumption are addressed (CONTRERAS; GARCIA ANAÍZ, 2011; FEATHERSTONE, 1995; LANG; HEASMAN, 2004; LIPOVETSKY, 2007; MANSVELT, 2005).The commercial synthesis of all these dimensions is materialized in the format chosen by each business group.

This article emphasizes cash and carry retail (popularly known in Brazil as "atacarejo") as an expression of a true commercial phenomenon in Brazil. The choice of format is justified by the visibility of cash and carry retail stores in the commercial landscape of cities. Between 2013 and 2023, it grew by 23% (110 stores/year) and achieved high penetration in households (72% in 2023), becoming the channel most accessed by families (NOCCHI, 2025). Originating in post-war Europe as a cash and carry model, it was introduced in Brazil in 1972 by Makro (ABAAS, 2022), evolving into a hybrid format that serves wholesalers and retailers (HSIEN; CÔNSOLI; GIULIANI, 2011; TUON; MOISÉS; MINADEO, 2011). It is characterized by prices that are 10-15% lower, reduced operating costs, logistical efficiency, and dual pricing (MATTOS, 2024).

The growth of cash and carry retail is linked to the Brazilian socioeconomic context, expanding during the 2008 crisis and the economic slowdown of 2011-2015, marked by unemployment and a decline in consumption (CARVALHO, 2018). Its low-cost and competitive pricing model responded to the needs of consumers affected by economic deterioration.

Given this context, the objective of this article is to analyze the expansion of discount stores in Brazil, relating it to urban and regional dynamics. This analysis evaluates the topology of land use by retail chains, considering the structure of the urban network and the presence of stores in metropolitan areas, regional capitals, subregional centers, zone centers, and local centers, according to the classification of City Influence Regions (REGIC).

Given the wide diversity of establishments, chains, and business groups in the supermarket sector, the research methodology focused on the ten leading cash and carry chains, based on the number of stores. This selection followed the 2024 annual ranking of the Brazilian Supermarket Association (ABRAS). Thus, the following companies were selected:

1 - Carrefour Group – Atacadão: 380 stores;

2 - Assaí Group – Assaí Atacadista: 262 stores;

3 - Mateus Group – Mix Mateus: 94 stores;

4 - Mart Minas & Dom Atacadista – Dom Atacadista: 87 stores;

5 - Cencosud – Bretas Atacarejo / Giga Atacado / Mercantil Atacado: 72 stores;

6 - Pereira Group – Fort Atacadista: 68 stores;

7 - Muffato Group – Max Atacadista: 58 stores;

8 - Kosh Group – Komprão Atacadista: 57 stores;

9 - Supermercados BH – Supermercados BH: 47 stores;

10 - DMA Atacadista – Brasil Atacarejo / Mineirão Atacarejo: 36 stores.

According to this snapshot, we found 1,159 cash and carry stores, distributed across ten chains and 13 brands operating in the country in 2024. Using this database, we analyzed how the expansion of this format became a phenomenon, transforming the supermarket sector and resulting in new business strategies in food retail.

The article is divided into three sections and final considerations. The first analyzes the topology of cash and carry retailers in Brazil, addressing the profile of stores, the main business groups, the number of stores, and their geographic distribution. The second highlights how the expansion of discount stores is linked to the characteristics of the urban network, reflecting the spatial strategies of retail capital in Brazil. The third presents a more detailed analysis of the ten largest companies, their market penetration, the origin of their capital, and their spatial occupation plans.

TOPOLOGY OF DISCOUNT STORES IN BRAZIL

Understanding the spatial dynamics of the discount store sector in Brazil requires a geographical approach that highlights the corporate use of the territory by retail capital, forming a geographical network in the sense of Corrêa (2012, p. 200) as "a set of human locations linked together." Among the dimensions suggested by the author for network analysis—organizational, temporal, and spatial—this article emphasizes the spatial dimension, particularly the topology of the networks formed by discount stores.

Topology shares with geography an interest in the study of space, offering an explanatory language of spatial properties based on relational and connection patterns, adding a qualitative perspective that goes beyond location and measurement. In Brazilian geography, in addition to the classic contributions of Corrêa (1991) on corporations in space, Santos and Silveira (2004) and Contel (2007) used this approach, albeit with limitations in exploring the fundamentals and scope of topology, as proposed by Thrift and Olds (1996). For Santos and Silveira (2004, p. 290), the term "topology" arises mainly as a descriptor of the geographical manifestation of the division of labor, where "each company, each activity needs points and areas that constitute the territorial basis of its existence (...) Seen in this way, the territory will arise as a kind of lace formed by the respective topologies."

The aim is to advance the use of the topological approach in the study of the spatial configuration of retail networks, revealing not only their geometric distribution, but also the logic of location, connections, flows, technical densities, and hierarchies that configure and reconfigure this phenomenon, creating new geographies of retail trade. Thus, it is essential to understand how retail networks are structured territorially, establishing distinct topologies, and how the modernization of retail is articulated with regional and urban specificities and socioeconomic disparities.

In practice, this analysis allows us to identify four topological elements: 1) Fixed points: store locations, areas of concentration and voids, density by geographic scale; 2) Flow lines: connections and circulation, distribution routes, logistics networks, flows of goods and information; 3) Areas: zone of influence, coverage, markets served, and territories of command; 4) Hierarchies: functional differentiation, presence of distribution centers, anchor stores, and formats differentiated by region.

The basis for studying the topology of cash and carry retailers was the 2024 ABRAS ranking, which included a total of 1,251 companies, out of a total of 414,663 stores in the country and approximately nine million direct and indirect jobs. In 2023, supermarkets accounted for 9.02% of Brazil's GDP, with revenues of R$ 1.0013 trillion, adding up all formats and distribution channels (SUPERHIPER, 2024).

Currently, discount stores account for 48.3% of the Brazilian supermarket sector's revenue, generating more than R$ 170 billion annually, according to ABRAS. Traditional supermarkets account for 39.7%, while hypermarkets contribute 6.9%, neighborhood stores 4.1%, and e-commerce 0.5%. These percentages refer only to the specific brands in each segment, while the ABRAS figure considers the total revenue of the chains, encompassing all brands and types of operation (SUPERHIPER, 2024).

According to the proposed methodology, this study covers the ten main cash and carry chains operating in Brazil listed in the ABRAS ranking, which total 13 brands, three of which belong to Cencosud and two to DMA Distribuidora. These ten companies have a total of 1,159 stores, distributed across all federal units (UFs), covering 403 municipalities. The profile of the chains is presented in Table 1.

GROUPS	BRANDS	STORES	REVENUE
Carrefour Comércio e Indústria LTDA.	Atacadão	380	115.4 billion
Assaí	Assaí	262	72.7 billion
Mateus Supermercados S.A.	Mix Mateus	94	30.2 billion
BH Supermarkets Food Trade S.A.	BH Supermarkets	47	17.3 billion
Irmãos Muffato & CIA. LTDA.	Max Atacadista	58	15.6 billion
Pereira Group	Fort Atacadista	68	13.1 billion
Cencosud Brasil Comercial LTDA.	Bretas Atacarejo	50	11.1 billion
	Giga Atacado	12	
	Mercantil Atacado	10	
Mart Minas Atacado e Varejo & Dom Atacadista	Dom Atacadista	87	9.4 billion
DMA Distribuidora S.A.	Brasil Atacarejo	5	7.9 billion
	Mineirão Atacarejo	29	
Kosh Hipermercado S.A.	Komprão Atacadista	57	7.9 billion

Table 1 - Annual revenue of chains. Source: Prepared by the authors based on data from ABRAS (SUPERHIPER, 2024).

*Revenue includes the total for the chain, not just the discount store brands.

Together, the companies that are the focus of this study had revenues exceeding R$ 300 billion in 2023. Their performance is among the highest in the country, reflecting the broad growth of the format in recent years.

The companies selected for this survey operate at the national, regional, and local levels, with stores throughout Brazil, highlighting the strength of the cash and carry sector in the country and its ability to establish different topologies in the territory. Table 2 shows the number of stores per state, specifying the number of chains and brands in each one.

An analysis of the distribution of cash and carry stores in Brazil reveals a high concentration in the Southeast. São Paulo leads with 216 stores (19% of the total) in 67 municipalities. Minas Gerais comes in second, with 164 stores in 73 cities, and Rio de Janeiro in third, with 94 stores. The region has the largest number of chains, reflecting its economic power.

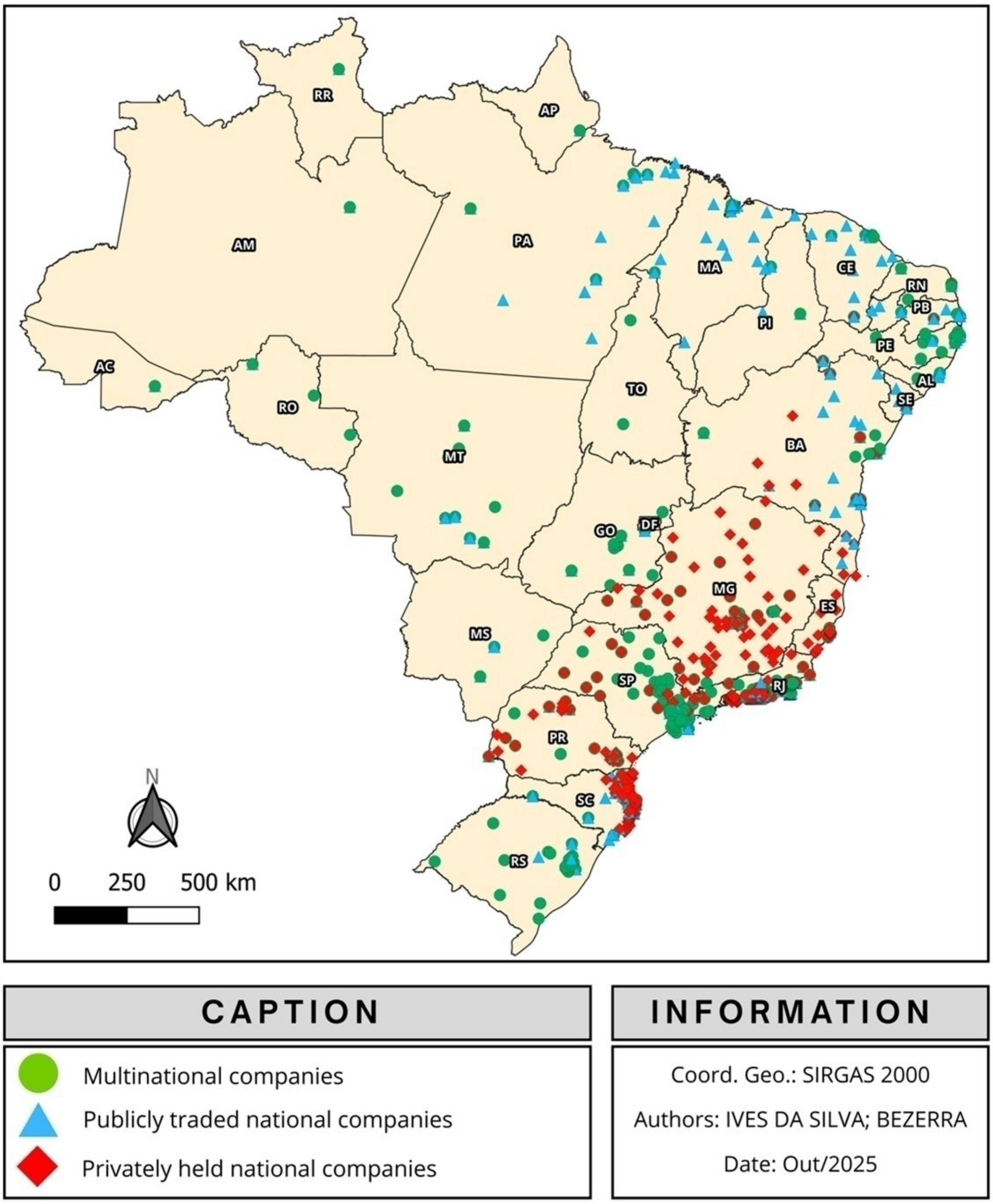
The South and Northeast have similar numbers of stores, but different patterns. Santa Catarina has 108 stores in 42 cities. Bahia, with a population twice as large (IBGE, 2022), has 90 establishments in 28 cities, leading the Northeast. Rio Grande do Sul has fewer stores, despite an economy superior to that of the northeastern states, indicating a more concentrated market.

NORTH	CITIES	STORES	CHAINS	BRANDS
Acre	1	2	2	2
Amapá	1	4	2	2
Amazon	1	9	2	2
Pará	14	37	3	3
Rondônia	3	5	2	2
Roraima	1	3	2	2
Tocantins	3	6	2	2
TOTAL	**24**	**66**	-	-
MIDWEST	**CITIES**	**STORES**	**NETWORKS**	**FLAGS**
Federal District	1	17	3	3
Goiás	10	41	4	4
Mato Grosso	9	26	3	3
Mato Grosso do Sul	3	21	3	3
TOTAL	**23**	**105**	-	-
NORTHEAST	**CITIES**	**STORES**	**NETWORKS**	**FLAGS**
Alagoas	2	13	3	3
Bahia	28	90	5	6
Ceará	14	43	4	4
Maranhão	13	28	3	3
Paraíba	9	22	4	4
Pernambuco	16	51	4	4
Piauí	4	14	3	3
Rio Grande do Norte	4	12	3	3
Sergipe	4	11	4	4
TOTAL	**94**	**284**	-	-
SOUTHEAST	**CITIES**	**STORES**	**NETWORKS**	**FLAGS**
Espírito Santo	10	19	3	3
Minas Gerais	73	164	6	6
Rio de Janeiro	25	94	4	4
São Paulo	67	216	5	5
TOTAL	**175**	**493**	-	-
SOUTH	**CITIES**	**STORES**	**NETWORKS**	**FLAGS**
Paraná	24	70	3	3
Rio Grande do Sul	21	33	2	2
Santa Catarina	42	108	3	3
TOTAL	**87**	**211**	-	-

Table 2 - Distribution of stores by Federal Units. Source: Prepared by the authors based on data from ABRAS (SUPERHIPER, 2024).

The Midwest has intermediate development, with Goiás (41 stores) and the Federal District (17 stores) standing out. The North has the lowest density, except for Pará (37 stores). Acre, Amapá, and Roraima have only one store each, in their capitals.

There is also segmentation by nature of capital (Map 1). Multinationals such as Carrefour (Atacadão) and Cencosud Brasil (Giga/Mercantil) seek national coverage. Publicly traded national companies, such as Assaí and Grupo Mateus, are expanding regionally, especially in the Northeast. Privately held companies, such as Supermercados BH and Mart Minas, operate in a concentrated manner (Southeast/South). Grupo Pereira (Fort Atacadista) and Cencosud Brasil occupy intermediate positions.



Map 1 - Spatial Distribution of Atacarejo Networks in Brazil According to the Nature of Business Capital. Source: Prepared by the authors based on data from ABRAS.

An analysis of the spatial distribution of cash and carry retail chains in Brazil reveals a territorial pattern marked by profound asymmetries related to the nature of the companies' capital. While multinationals consolidate a comprehensive national occupation strategy, reaching even regions with low population density and less economic dynamism, domestic companies have significant territorial limitations: those with public capital concentrate on gradual regionalization processes, particularly in the Northeast, while those with private capital mainly occupy more consolidated markets in the Southeast and South. This spatial configuration not only reflects the different investment capacities and economies of scale among business groups but also highlights the reproduction of regional inequalities in access to the cash and carry retail market, revealing distinct power geometries in terms of food supply operated by retail chains.

THE RELATIONSHIP BETWEEN DISCOUNT STORES AND CITIES: AN ANALYSIS BASED ON REGIC

The most classic concept of urban networks in Brazilian geographical literature is offered by Corrêa (1994, 2004, 2005), who characterizes them as a set of urban centers that are functionally interconnected. Urban networks are also a social product, historically woven by spatialized social interactions that guarantee the existence and reproduction of society in a given space. Beyond the rich theoretical discussion on the Brazilian urban network, the research and proposals for urban typologies recommended by the IBGE are important examples of how to operationalize the understanding of the urban network in a practical way, with the systematization of the Regions of Influence of Cities (REGIC) research as the main reference.

REGIC represents "an important tool for location decisions and practical applications, both for state planning and society in general," and can support, for example, decisions on where to locate businesses, health care facilities, and educational institutions (IBGE, 2020, p. 9).Its methodology assesses the attraction between cities and long-distance connections, classifying urban centers into a five-level hierarchy (Table 3).

Major Regions	Metropolis		Regional Capital		Subregional Center		Zone Center		Local Center	
	Cities	%	Cities	%	Cities	%	Cities	%	Cities	%
Brazil	15	100	97	100	352	100	398	100	4037	100
North	2	13.3	11	11.3	27	7.7	21	5.3	373	9.2
Northeast	3	20.0	21	21.7	88	25	135	33.9	1436	35.6
Southeast	5	33.3	38	39.2	120	34.1	107	26.9	1074	26.6
South	3	20.0	21	21.7	83	23.6	90	22.6	819	20.3
Midwest	2	13.3	6	6.2	34	9.7	45	11.3	335	8.3

Table 3 - Regional distribution of the five levels of urban hierarchy of REGIC. Source: IBGE (2020).

According to Moura, Nagamine, and Ferreira (2021), the main feature of Brazilian urbanization is metropolization, followed by the formation of regional capitals. As major centers, these cities structure their surroundings, drive national integration, and redefine the regional division of labor. Many of these new centralities reflect less of a hierarchical pattern and more of a configuration of urban heterarchies, which helps explain the importance of medium-sized cities (FERNANDES; CATELAN, 2023).

Scherer and Amaral (2020) found that medium-sized cities are fundamental elements of integration for understanding the network of cities. According to the authors, in the early 2000s, there was an internalization of intermediate centralities in the country, resulting in a combination of factors not only related to population, but also to the sectoral profile of the socio-occupational structure and the distance effect of medium-sized cities in relation to larger hierarchical levels, thus ensuring their space for polarization.

Attentive to the new urban centralities, corporate capital seeks to expand capitalist accumulation through commercial strategies adapted to the spatial context. Among large corporations, the relationship with space is complex, given their power to introduce activities that generate differentiations between urban centers, which, in turn, condition new actions (CORRÊA, 1994). Corrêa (2005) highlights the main characteristics of large corporations: large scale of operations, multifunctional nature, segmentation, multiple locations, and high economic and political power in competitive relations and with the state.

The expansion of discount stores on a larger scale began with the movement of multinational capital, notably the Carrefour Group's purchase of the Atacadão chain in 2007. At the time, Atacadão had only 34 stores, 17 of which were located in São Paulo. With the incorporation of a new format (then called a “discount hypermarket”) into the group, exponential growth was observed, later replicated by other companies, whose geographic dynamics we present below.

The cash and carry stores of the groups analyzed in the survey are present in the five classification levels of REGIC, which highlights their strong performance throughout the national territory. Based on this classification of the urban chain, we organized Table 4, which shows the number of stores and chains for each hierarchical stratum.

HIERARCHY	STORES		CITIES	
Large National Metropolis	137	11.82	23	5.71
National Metropolis	84	7.25	12	2.98
Metropolis	280	24.16	61	15.13
Regional Capital C	181	15.62	74	18.36
Regional Capital B	140	12.08	37	9.18
Regional Capital A	96	8.28	17	4.22
Subregional Center B	114	9.83	83	20.60
Subregional Center A	100	8.63	71	17.62
Zone Center B	4	0.35	4	0.99
Zone A Center	12	1.04%	11	2.73%
Local Center	11	0.95	10	2.48
TOTAL	**1159**	**100**	**403**	**100**

Table 4 - Number of stores and cities at each level of urban hierarchy. Source: Prepared by the authors based on data from IBGE and SuperHiper 2024 magazine.

Location is an important factor when it comes to the cash and carry segment. In this regard, Noël Prioux, former president of the Carrefour Brasil Group, when asked about the revenue of 30 new Makro stores acquired, replied: “The results of the companies we buy don't matter. We have our model. More important to us is location. Based on that, we will apply our model” (ESTADÃO CONTEÚDO, 2020, online).

A key decision in the location strategy is the degree of geographic concentration of retail units, which can be divided into geographic dispersion and concentration. Dispersion involves the distribution of units in various cities and regions, with the aim of minimizing the number of stores in the same area, in order to reduce the risks associated with excessive concentration. Geographic concentration, on the other hand, seeks to group units in a single region, aiming at advantages such as market preference and proximity to consumers (PARENTE; KATO, 2001).

An analysis of store distribution according to the REGIC hierarchical group (Graph 1) highlights the importance of metropolitan areas, which account for 43% of the total, and the discrepancy at the lowest level of the hierarchy, with zone centers and local centers, which represent only 1% each of cash and carry stores.

Analyzing the graph, we can see a marked hierarchical structure in the spatial distribution of cash and carry stores based on the REGIC classification. The majority of stores (fixed points) are concentrated mainly in metropolitan areas (43%), which function as dense retail hubs and territorial command centers, highlighting areas of high commercial density.

According to REGIC, regional capitals concentrate management activities, but with a smaller reach than metropolitan areas in terms of region of influence. They are subdivided into three strata, all of which are state capitals. However, particularly in stratum C, there are cities with a population of around 200,000 inhabitants, many of which are governed by the dynamics of medium-sized cities and are also locations of strong interest for the spatial strategies of cash and carry retail chains (MIYAZAKI; GOMES; SPOSITO, 2022).

Graph 1 - Distribution of cash and carry stores according to the REGIC IBGE 2018 hierarchical group.
Source: Prepared by the authors based on data from IBGE and SuperHiper Magazine 2024.

The dynamics of concentration in metropolises and regional capitals are contrasted by significant geographical gaps in the lower hierarchical scales, where zone centers and local centers represent only 1% each. This data may indicate two possibilities as a hypothesis: 1) the existence of a minimum threshold for the format's operation considering the population variable. We cite the example given by a manager of the Mateus Group during an interview, who reported that the group works with a threshold of 50,000 inhabitants for opening a cash and carry store; 2) the position of the city in the urban network as a criterion for opening a store based on the criterion of distance from a higher-level urban center. This is relevant information regarding the geographical reach of a cash and carry store.

The flow lines implied in this configuration reveal centralized logistics networks at the top of the urban network, with distribution and circulation routes for goods and information converging from metropolitan areas and regional capitals (34%) to the peripheries of the national urban system. This topology highlights different areas of influence: while metropolises have wide ranges of action and extensive markets, subregional centers (18%) have intermediate coverage areas, and the lower strata of the urban hierarchy remain with residual territories of command.

Finally, hierarchical functional differentiation is manifested not only in the density of stores by geographic scale, but also suggests the concentrated presence of distribution centers, anchor stores, and a diversity of retail formats at the metropolitan level, while the lower strata of the urban network are characterized by the absence or minimal presence of these facilities, configuring a selective expansion pattern that favors the main management centers of the Brazilian territory.

THE OPERATING STRATEGIES OF THE TEN LARGEST NETWORKS

The cash and carry sector in Brazil is characterized by a remarkable diversity of economic agents, from regional companies to transnational corporations, which configure new territorialities in food marketing. This heterogeneity of capital reveals different spatial rationalities and strategies for insertion into the urban network, as pointed out by Agner (2024). An analysis of the ten largest chains allows us to identify how each group articulates its expansion plans, regional specificities, and different levels of geographical concentration or dispersion (PARENTE; KATO, 2001).

The Atacadão Network, part of the Carrefour Brasil Group, is the largest cash and carry r in the country, with a national presence (IVES DA SILVA, 2023). A pioneer in the format, its aggressive model is considered a national expertise, recently exported to France (AFP, 2024). The Assaí Atacadista Network stands out for its rapid expansion and operational efficiency. After being spun off from GPA in 2021, the French group Casino sold its entire stake in the company in 2023.

The Mateus Group, with a strong presence in the North and Northeast, has a strategic pillar in the cash and carry market (under the "Mix Mateus" brand), with one of the highest growth rates in the country and a recent agreement to acquire control of the Pernambuco-based Novo Atacarejo group.

The Supermercados BH Group, the main player in Minas Gerais, has expanded its operations beyond Minas Gerais through acquisitions, such as the EPA and Mineirão chains and, more recently, the Bretas chain, whose operation is awaiting approval by CADE. The Muffato Group, operating in Paraná and São Paulo under the Max Atacadista banner, is an example of a regionally focused chain. The Pereira Group is also one of the national leaders with its Fort Atacadista banner, present in the South, Southeast, and Midwest regions.

The Cencosud Group, a Chilean multinational, is one of the largest retail conglomerates in Latin America and has expanded its presence in Brazil in the cash and carry segment with the Bretas Atacarejo, Giga Atacado, and Mercantil Atacado brands. Aimed at end consumers and small retailers, these brands offer competitive prices and a wide variety of products.

The Mart Minas Group has been consolidating its position through expansion and innovation strategies. With the acquisition of 50% of Dom Atacadista in 2022, it expanded its operations to the state of Rio de Janeiro, strengthening its position on the national scene (AMIS, 2022).

The DMA Distribuidora S.A. Group, headquartered in Contagem (MG), is another group from Minas Gerais that stands out in the cash and carry sector in Brazil, with 100% national capital. With 34 stores in seven states, it operates under the EPA Supermercados, Mineirão Atacarejo, and Brasil Atacarejo brands. Finally, the Koch Group, based in Santa Catarina, operates Komprão Atacadista, the only chain among the ten largest with operations restricted to a single state, exemplifying a commercial strategy on a state scale.

Looking at the strategies of the ten companies, the following common aspects can be observed:

1 - Hybrid model: they serve end consumers and small retailers, with prices differentiated by volume;

2 - Regional and national expansion: stores in strategic regions, especially in emerging urban areas and medium-sized cities;

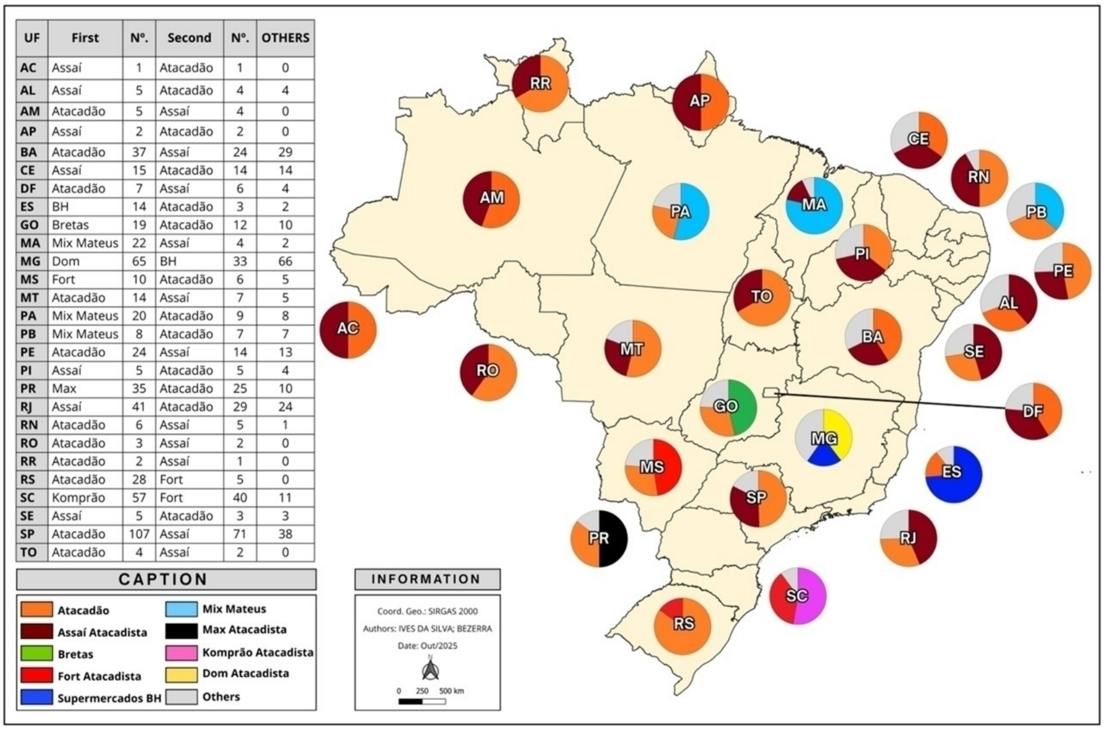
3 - Operational efficiency: simple structure, large stores, and agile logistics to keep costs low.

To identify the strength of the chains' operations in Brazil, assimilating the above strategies, Map 2 shows the geographical distribution of cash and carry chains in Brazil by state (UF). The proportional circles on the map allow you to quickly visualize the concentration and predominance of each cash and carry chain in different regions of the country.

Acre, Amapá, and Piauí show a balanced distribution between the Assaí Atacadista and Atacadão chains, with no predominance of one over the other, and are therefore classified in the "tie" category. Acre and Amapá only have stores from these chains, while Piauí also has four Mateus Group establishments, but with one store less than the other two chains.

Although it originated in the South, specifically in Santa Catarina, Fort Atacadista currently stands out for having the largest number of stores in Mato Grosso do Sul. Until 2021, it also led in its home state, where its headquarters are located, but lost its position to the Kosh Group, which operates under the Komprão Atacadista banner, with 57 stores distributed across 34 municipalities in the state of Santa Catarina.

In addition to Fort Atacadista and Komprão Atacadista, other chains stand out as predominant in only one state: Bretas, Supermercados BH, Dom Atacadista, and Max Atacadista. The DMA Atacadista group, represented by Mineirão and Brasil, does not lead in number of stores in any Brazilian state.



UF	First	Nº.	Second	Nº.	OTHERS
AC	Assaí	1	Atacadão	1	0
AL	Assaí	5	Atacadão	4	4
AM	Atacadão	5	Assaí	4	0
AP	Assaí	2	Atacadão	2	0
BA	Atacadão	37	Assaí	24	29
CE	Assaí	15	Atacadão	14	14
DF	Atacadão	7	Assaí	6	4
ES	BH	14	Atacadão	3	2
GO	Bretas	19	Atacadão	12	10
MA	Mix Mateus	22	Assaí	4	2
MG	Dom	65	BH	33	66
MS	Fort	10	Atacadão	6	5
MT	Atacadão	14	Assaí	7	5
PA	Mix Mateus	20	Atacadão	9	8
PB	Mix Mateus	8	Atacadão	7	7
PE	Atacadão	24	Assaí	14	13
PI	Assaí	5	Atacadão	5	4
PR	Max	35	Atacadão	25	10
RJ	Assaí	41	Atacadão	29	24
RN	Atacadão	6	Assaí	5	1
RO	Atacadão	3	Assaí	2	0
RR	Atacadão	2	Assaí	1	0
RS	Atacadão	28	Fort	5	0
SC	Komprão	57	Fort	40	11
SE	Assaí	5	Atacadão	3	3
SP	Atacadão	107	Assaí	71	38
TO	Atacadão	4	Assaí	2	0

Map 2 - Strength of brands in each UF. Source: Prepared by the authors based on data from ABRAS.

It is important to highlight the sudden growth of Grupo Mateus, which only entered the top ten chains in the country in 2022, but is currently the largest retail company based in the Northeast and already dominates in terms of number of stores in three states: Pará, Maranhão, and Paraíba. Another notable company is Grupo Supermercados BH, despite dominating in terms of number of stores only in Espírito Santo. The chain entered the list of the ten largest only in 2013 and currently ranks fourth in the ABRAS ranking. In addition to Espírito Santo, its stores are located in Minas Gerais, which demonstrates the strength of the state of Minas Gerais in the supermarket sector.

Companies adopt various territorial strategies to expand and consolidate their presence. The Bretas Atacarejo and Dom Atacadista chains, with stores in only one state each, influence the country's territorial expansion by operating in cities at different REGIC levels. The Atacadão and Assaí chains, which are predominant in 15 states, develop specific strategies to compete with regional or state forces in states where they are not predominant.

In this vein, the strategies of the ten largest chains, which involve intensive saturation of territories and diversification of formats to capture different income segments, materialize in the geographical space the search for economies of scale, scope, and the consolidation of their market power. Thus, deciphering these tactics is not limited to mapping points of sale, but rather to uncovering how space is instrumentalized as a central competitive element, shaping the oligopolistic structure of the sector itself.

CONCLUSION

Cash and carry is a food retail format that has represented a highly relevant economic and spatial phenomenon in the first decades of the 21st century. This research has contributed to a deeper understanding of the topic through industry data, focusing on urban and regional dimensions.

The current scenario in the sector reveals progressive growth in the number of stores, sales, market share, and presence of discount stores in cities. The expansion of stores in Brazil is linked to the country's socioeconomic situation, as this format has been the most responsive to the economic context of recent years, with a decline in employment and household purchasing power. Initially aimed at low-income classes, the sector began to attract consumers with greater purchasing power, even setting up in residential neighborhoods. This change may redefine the future of the segment and the spatial pattern of new investments, showing situations in which the profile of certain stores more closely resembles the hypermarket pattern, especially if they are located in neighborhoods with higher incomes.

It is important to consider the urban hierarchy proposed by REGIC to understand how discount stores are expanding across all strata of the urban network, demonstrating their strength in a diverse country. Although most stores are still concentrated in large cities (43%), growth in regional capitals and medium-sized cities indicates a movement toward interiorization and territorial diversification, complicating spatial strategies. This process reveals not only the adaptability of business networks, but also new consumption patterns in a society increasingly marked by socioeconomic inequality.

Finally, we highlight the ambivalence of the phenomenon studied. While on the one hand, discount stores demonstrate unquestionable strength in the corporate use of territory, with commercial power derived from high profit margins guiding investments, on the other hand, they reveal contradictions inherent in the commodification of food supply. The absence or reduction of state action in this sphere transfers decisions about food security, access, and nutritional quality to the end consumer who shops at these establishments. By focusing on the development of a low-cost channel and offering competitive prices, discount stores are betting on the aggressive marketing of ultra-processed products, thus contributing to the expansion and facilitation of access to such "foods" for the low-income population.

Future research should further analyze: i) the impacts of discount stores on small businesses and intra-urban centrality dynamics; ii) the effects of the sector's financialization on location strategies and supply diversity; iii) relationships between discount stores and agri-food systems, especially with regard to local suppliers and family farming; iv) the configuration of food deserts and swamps as a function of the spatial distribution of this format. Such investigations are fundamental for developing public policies that balance market dynamics with the right to adequate food.

ACKNOWLEDGMENTS

We would like to thank the National Council for Scientific and Technological Development (CNPq), the Federal District Research Support Foundation (FAPDF) through the Spontaneous Demand Notice, and the Dean of Research and Innovation at the University of Brasília (DPI/UnB) for the financial and institutional support that was fundamental to the completion of this work.

DATA AVAILABILITY

Not applicable.

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Editors in Charge