

New Trends in Globalisation: An Examination of the Brazilian Case

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Abstract

This analysis looks at the role of Wal-Mart in Brazil by using glocalisation theory. Glocalisation refers to the strategies and practices adopted by transnational corporations to cater to local cultures and customs. In the case of Wal-Mart in Brazil, it unsuccessfully attempted to impose the US strategy of management practices, employee standards, low wages, EDLP (every-day-low pricing) for buyers, fierce pressure on suppliers, harsh anti-union policies and aggressive expansionism tendencies. In this, Wal-Mart was met with heavy resistance because it failed to glocalise. However, Wal-Mart changed tack or 'compromised' by following glocalisation principles and made deep inroads in the Brazilian market. This analysis is important for two reasons. First because it analyses the functioning of a giant corporation that ventured into uncharted territory from a theoretical perspective; an endeavour that has few scholars have hitherto undertaken. Second, in recent years, there has been scant consideration of the Brazilian market and its role in the global retailing process.

Keywords

Adaptation, Brazil, culture, globalisation, glocalisation, Wal-Mart

Introduction

This article analyses the role of Wal-Mart in Brazil, an emerging market, by using glocalisation theory. By and large, glocalisation refers to the strategies and practices adopted by transnational corporations to cater to local cultures and customs. In the case of Wal-Mart, it was met with heavy resistance when it first entered the Brazilian market in 1995. The reason for this was it failed to glocalise and unsuccessfully imposed the management practices adopted in the US namely low wages, EDLP (every-day-low pricing) for buyers, fierce pressure on suppliers, harsh anti-union policies and aggressive expansionism tendencies. However, after careful consideration, Wal-Mart followed the principles of glocalisation. This analysis begins with a perspective on globalisation. Specifically described are two globalisation trends—Wal-Martisation and glocalisation. An attempt is thereafter made to provide a brief history of Wal-Mart in Brazil—from its difficult debut to the giant it has become today. What follows is an explanation of why Wal-Mart experienced cultural clashes during its earlier days in Brazil. This lays the foundation for the centerpiece of this analysis—how Wal-Mart became successful—thanks to glocalisation. These glocalisation competencies are described through four key themes: (a) glocalisation practices: adapted brands and products, (b) glocalisation practices: adapted store lay-outs, (c) glocalisation practices: management and work procedures and (d) glocalisation practices: logistics and operational procedures. This analysis ends with a discussion section that also offers suggestions for future research.

Globalisation Perspectives

The Columbian exchange was the largest ever international exchange of humans, ideas, plants, products and in particular, food (Nicholls, 2009; Whelan & Laden, 2009). The twenty-first century has witnessed the next-biggest exchange of food, as transnational corporations (TNCs) look for new venues of products and new markets to enhance their diminishing growth (Selling to the Developing World, 2003). One of those TNCs is Wal-Mart Stores, Inc. During the fiscal year 2008, worldwide sales for Wal-Mart already represented a large percentage of its \$374.5 billion in net sales (Clark & Edelson, 2008). For more than a decade, Wal-Mart has managed to transfer two-thirds of its capital expenditures to international high-growth markets (Zimmerman, Bustillo & Lublin, 2008). In fact, Wal-Mart has stores in Brazil, another top international market for the global behemoth (Brunn, 2006; Frazier, 2007; Hays, 2004). While critics claim that the Wal-Martisation of the world is detrimental to business, society and culture, others suggest that Wal-Mart contributes to the economic prosperity of individuals, communities and even entire countries by catering to their local tastes and preferences (Welch & Welch, 2006). This section explains the value of the former statement by comparing two current trends in globalisation: Wal-Martisation and glocalisation.

Wal-Martisation

Wal-Mart's ubiquity is one reason it has forced a re-examination of the world around it (Marquard, 2006). Wal-Martisation of the world is a process that is currently happening. 'Wal-Mart International', Wal-Mart's official Website, proudly exhibits the exploits and profits of its 4,000 stores in the United States and 3,000 stores in the other parts of the world. Wal-Martisation refers to the classic method of rationalisation of consumer living and the very embodiment of the mottos 'faster, better, cheaper' and 'bigger, more global'. Wal-Mart reduces prices by half because it can (Bosshart, 2007). Other important factors that have facilitated Wal-Martisation include information technology (i.e., its sophisticated satellite system that can track cargo loads to the smallest detail), global sourcing and the growth of global consumer segments (da Rocha & Dib, 2002). Wal-Mart's pervasive business model has reached such a pinnacle that it will not only make Wal-Mart the first trillion-dollar-a-year corporation soon; it will also spread its supercenters up to every two miles (Butler, 2005).

Wal-Martisation also entails the notion of organic growth. Organic growth is the method by which a TNC expands as a result of increased output, sales or both (Blass, 2009; Steil & Hinds, 2009). Wal-Mart's organic growth is enabled through new store development within an integrated corporate framework. TNCs like to follow the strategy of replicating domestic operations in the rest of the world (Ward, 2004). Through organic growth, a corporation can preserve operational control and maintain its identity and brand awareness (Coe & Hess, 2005). Organic growth guarantees that financial and management control be kept within the premises of the parent company, while multiple branches of the corporations are operated overseas (Cole et al., 2005). Wal-Mart claims it can generate extensive organic growth by providing services to roughly 140 million consumers already flocking to its stores on a weekly basis (Bowers, 2006). Wal-Martisation is synonymous with the image of an unstoppable discount, 'big box' retailer, an image upon which Wal-Mart wants to thrive, especially with respect to its large-scale supply-chain management style (Burchman & Jones, 2005).

From all this, it seems that organic growth goes perfectly hand-in-hand with the Wal-Martisation model (Swoboda, Schwarz & Hälsig, 2007). Yet, as this analysis will point out, the Wal-Martisation of the world has not been free from problems. Many of these problems pertain to incongruity in the local cultures in which Wal-Mart Stores, Inc. operates. A primary flaw of the South American market has been its economic instability; a major culprit has been high inflation. For a long time, national economies have fluctuated between elevated levels of public debt and hyperinflation. Brazil was no exception (Alexander & de Lira e Silva, 2002). Therefore, in South America, the practice of organic growth alone was set to fail. In order to survive, Wal-Mart had to follow another globalisation strategy; it is called glocalisation.

Glocalisation

As Kotler, Fahey and Jatusripitak (1986) suggest, the entry of a corporation into a foreign market necessitates more detailed examination and imagination than it normally would if it were to compete in its own domestic market. Scholars on international retailing have highlighted the unique challenges and opportunities that companies face when operating on a global scale (Bennison & Gardner, 1995; Burt, 1991; Davies & Jones, 1993; Davies & Sanghavi, 1995; Goldman, 1981; Ho & Sin, 1987; Kaynak, 1980; Lord, Moran, Parker & Sparks, 1988; Martenson, 1987; McGoldrick & Ho, 1992; Muniz-Martinez, 1998; Sparks, 1995; Treadgold, 1991). A theoretical concept that scholars have associated with this is glocalisation. Glocalisation, a term coined by Robertson (1994), refers to the set of strategies adopted by a multinational corporation—e.g., a retailer—to sell products and services by catering to the local culture in which the corporation is located (Kraidy, 2002). In this context, rather than imposing its US blueprint of management approaches, employee practices, low wages, EDLP (every-day-low pricing) for buyers, fierce pressure on suppliers, harsh anti-union policies and aggressive expansionism tendencies, Wal-Mart has had to compromise. That is, it had to show so much flexibility that it eventually changed the core elements of its corporate image and culture (Featherstone, 2004).

For example, as explained in detail later, Wal-Mart in Brazil had to change the format of its local stores (e.g., store layout and methods of stocking goods). Glocalising on the premise of store format is a common and essential practice for many international retailers. Research has shown that different degrees of success have been achieved based on the extent of glocalising (Evans, Treadgold & Mavondo, 2000). Glocalisation deals with marketing orientation and awareness of cultural distance (Alexander & de Lira e Silva, 2002). The problem that Wal-Mart faced when entering Brazil was its inability to find its way into a South American market of which it had relatively little knowledge, a market in which its traditional organic growth strategy and its gigantic U.S. supercentres no longer attracted customers as it does in places like Denver and Jacksonville (Zimmerman, Bustillo & Lublin, 2008).

Glocalisation for Wal-Mart in Brazil was no longer an option; it became a necessity. The South American Market represented a ‘tried-and-tested’ market for a newly arrived retailer. Simply put, Wal-Mart was navigating in ‘uncharted waters’, and thus incurred greater risks (Hernandez & Biasiotto, 2001). The key was to carefully evaluate its position and strategic impact in Brazil, utilising factors not just derived from its typical corporate approach but also from the cultural environment in which the company was located. From a glocalisation standpoint, while core company competencies remain important, certain functions and roles need to be modified so that the company can compete successfully in a new marketplace (Burchman & Jones, 2005).

Description of Wal-Mart in Brazil

Wal-Mart entered the Brazilian retail industry in 1995, in the state of Sao Paulo, through a joint venture and subsequent acquisition of Lojas Americanas, one of Brazil's largest non-food retailers and a company of the Garantia group (Alexander & Doherty, 2009). Wal-Mart's founder, Sam Walton, had an ongoing friendship with Jorge Lemann, a major founder of the Garantia Group and key shareholder of Lojas Americanas. This friendship led to the formation of ties between the two retailers (Jordan, 2001). In fact, Lojas Americanas executives visited Wal-Mart to gain management expertise. Sam Walton was convinced that Brazil was an ideal market for discount operations and persuaded Lojas Americanas' managers to venture into other regions of the country (Lemann & Sicupira, 1992). When Wal-Mart's chief executives entered the Brazilian market, the alliance with Lojas Americanas was a natural development of ties that existed already. Lojas Americanas had a stake of 40 per cent in Wal-Mart Brazil but Wal-Mart USA was the one to manage the joint-venture (da Rocha & Dib, 2002).

For Wal-Mart, South America was the first geographical area where cultural habits differed sharply from those in the United States (Quelch & Deshpande, 2004). In South America, the percentage of all food expenditures spent in supermarkets skyrocketed from 15 per cent in 1990 to 60 per cent in 2000. It is still rising rapidly (Popkin, 2007). Nevertheless, in South America, while Brazil had a 75 per cent segment of supermarkets in food retail store sales, Bolivia only had, at the most, 10 per cent (Reardon, Timmer, Barrett & Berdegue, 2003). This was another reason for Wal-Mart to invest there. Wal-Mart's goal to enter the Brazilian market was to replicate the success it had in Mexico (Dolan, 2004a). Brazil was dominated by a handful of gigantic companies, including Carrefour (the market leader) and Pao de Acucar and Sendas (Roberts, 2009). According to 1995 data, Brazil's supermarket industry represented 6.6 per cent of its GNP (the equivalent of US \$43.7 billion). The 1997 data reveal that Wal-Mart's major competitors were Carrefour, CBD (Companhia Brasileira de Distribuição), Royal Ahold and Makro Atacadista (Kotabe & Helsen, 2007). Nevertheless, as early as in 1993, before Wal-Mart ventured in Brazil, its retailing industry had sales of US\$39 billion. In 1999, total sales of the Brazilian industry amounted to approximately US\$48 billion, an increase of 23 per cent in six years. During the same year, there were over 51,000 supermarket and hypermarket stores that operated there (da Rocha & Dib, 2002).

For the past few years, Wal-Mart in Brazil has come into its own. For example, in 2004, the giant retailer bought Bompreço (which translates as 'good price' in Portuguese), a 188-store supermarket chain in the northeast, for \$300 million (Benson, 2004; Borges, Hoppen & Luce, 2008; Gibbon & Ponte, 2005; Krippendorff, 2008). This Bompreço acquisition made Wal-Mart the third-largest Brazilian retailer, with \$1.6 billion in sales (whereas before it only held the sixth position) (Dolan, 2004b, Samor, 2005). During the same year, Wal-Mart also purchased the Ahold stores, the third largest Brazilian supermarket chain, which

had to leave Brazil due to international problems (Farina, Nunes & Monteiro, 2005). Even though Wal-Mart is only 50 per cent the size of CBD (Companhia Brasileira de Distribuição), the 2004 acquisitions were only the beginning of Wal-Mart's success in the most populated country of South America (Dolan, 2004b). And Wal-Mart grew quickly. In 2005 alone, Wal-Mart added another 118 stores (Kitchens, 2005). A report by the Brazilian Supermarkets' Association revealed that Wal-Mart's total annual sales exceeded \$500 million. In the same year, Wal-Mart acquired Sonae SGPS SA (a Brazilian operations of Portuguese retailer) for \$757 million (Samor, 2005). In 2006, Wal-Mart opened or acquired about 25 additional stores in Brazil and reached the same level of growth in 2007 (Fochtman, 2007; Kotabe & Helsen, 2007).

Today, Wal-Mart in Brazil has almost 350 stores and employs over 70,000 people (The Associated Press, 2008). Wal-Mart plans to increase its operations in Brazil, during the fiscal year of 2009, by investing 1.6 billion U.S. dollars and building another 80 to 90 stores. This will constitute the largest investment by Wal-Mart in Brazil since its entry in 1995. The investment was announced by Hector Nunez, the president of Wal-Mart in Brazil during a meeting in Brasilia (the capital city) with Luiz Inacio Lula da Silva, the former Brazilian President. This new investment was expected to generate more than 9,000 jobs for the country. Wal-Mart executives claim they have invested 1.85 billion U.S. dollars in Brazil between 2004 and 2008 (The Associated Press, 2008).

Despite all the aforementioned facts that can ascertain Wal-Mart's success in Brazil, the U.S. giant retailer had a difficult time adjusting to the South American shopping and corporate climate during the first few years of its Brazilian venture. In fact, in the beginning, Wal-Mart faced major cultural clashes, which are thoroughly described in the next section.

Wal-Mart in Brazil: Cultural Clashes

When Wal-Mart Stores, Inc. entered the Brazil supermarket industry in 1995, many scholars and commentators thought it would be an immediate success—Brazil being South America's largest country and market. Within a few weeks following Wal-Mart's opening of its first supercentre in Sao Paulo, Wal-Mart looked like it was thriving. The parking lot was fully occupied by 9:30 a.m. on a Saturday. Avid customers were lining up for two hours to get a roasted chicken for \$2.80, 30 per cent less than at nearby supermarkets (Dolan, 2004a). Unfortunately, things quickly turned sour for Wal-Mart. As opposed to Wal-Mart's successful experience in Mexico, where its adoption of a forceful, but courageous approach of acquisitions quickly turned the U.S. retailer into a dominant force, Wal-Mart's first years in Brazil proved largely fruitless. Within the early years of Wal-Mart's entry in Brazil, its annual performance was routinely meagre because it failed to adapt its US practices there (Quelch & Deshpande, 2004). In

its first years in Brazil, Wal-Mart had no choice but to tread cautiously. It only opened 25 stores in four of Brazil's 27 states.

Generally, new competitors are seen as either more threatening or less threatening. The level of threat depends on the extent to which new entrants defy established industry rules, they have goals that are more or less ambitious and they considerably perturb current competitors' positions (Porter, 1985). Based on Porter's classification, Wal-Mart was considered a 'bad' competitor because it refused to play by the rules of the Brazilian market. Indeed, Wal-Mart was adamant to impose, on Brazilians, its US blueprint of shopping practices, management styles, employee practices, store lay-outs and intense pressure on suppliers (Featherstone, 2004), without making any attempt to glocalise. Not only were Brazilian consumers' responses strong, but competitors' responses were strong too. Wal-Mart's resentment and persistence were instant but inefficient. Although Wal-Mart's entry was perceived as playing a major role in the modernisation of Brazilian retailing, it was also seen as clashing with Brazilian cultural values (da Rocha & Dib, 2002).

Simply put, cultural clashes were the main culprit because Wal-Mart was not adapting to local tastes and differences. Instead, it stocked its stores with brands and products that are common in the United States—e.g., golf clubs and lawn mowers—but that are insignificant to most Brazilian consumers (Benson, 2004). Products that are popular in US stores may meet strong opposition abroad. As Hays (2004) acknowledges, there was noticeable resistance to the encroachment of the US company on local businesses. Wal-Mart endured difficult years adapting to the market. It vehemently imported its Bentonville, Arkansas practices only to discover that US working practices and consumer behavior did not suit its operational approach (Alexander & de Lira e Silva, 2002). In essence, Wal-Mart executives ignored the buying habits of Brazilians and took the shortcut of assuming that they would purchase products in the American way. Besides, Wal-Mart did not consider the differences in logistics that they would encounter in Brazil. Consequently, the first attempts at establishing facilities in Brazil were failures (Fernandez & Shengjun, 2007; Stanat, West & Stanta, 2000).

Wal-Mart's strategies and retailing practices were deemed aggressive by local consumers and competitors in the Brazilian market. Its long-established notoriety for destroying small businesses in the United States, as it built new stores from one town to another (Peterson & McGee, 2000), frightened local competitors in that foreign market (da Rocha & Dib, 2002). Even scarier was Wal-Mart's unwillingness to 'bend' and take the Brazilian direction. As we can see, what was missing in Wal-Mart was a lack of complementarity that was needed to fill the gaps, to bridge misunderstandings between Wal-Mart USA and Wal-Mart Brazil. Management failed to look into strategic flexibility (Palmer, 2006). Flexibility is a vital practice for organisational survival in a foreign market. Flexibility equals glocalisation. The following section explains, in detail, the glocalisation strategies adopted by Wal-Mart in order to meet appropriate levels of cultural adjustment.

Glocalisation: Cultural Adjustment in Brazil

The failure of Wal-Mart's introduction of US-based blueprint of corporate strategies to the Brazilian market prompted executives to launch a series of structural changes in Brazilian retailing (Uusitalo, 2004). Put simply, Wal-Mart developed core glocalisation competencies within the Brazilian market at large. These glocalisation competencies are described through four key themes: (a) glocalisation practices: adapted brands and products, (b) glocalisation practices: adapted store lay-outs, (c) glocalisation practices: management and work procedures and (d) glocalisation practices: logistics and operational procedures.

Glocalisation Practices: Adapted Brands and Products

According to Chain Store Age (2000), establishing a Wal-Mart supercentre in a South American market is easy. The major obstacle is adapting the brands and products to the local culture. By and large, Wal-Mart executives disregarded the shopping habits of Brazilians and did not take into account that their consumer practices would differ sharply from those in the United States (Fernandez & Shengjun, 2007). From this vantage point, when it entered the Brazilian market, Wal-Mart was unsuccessful in exporting its cookie-cutter blueprint for success in the United States to Brazil (Stanat, West & Stanta, 2000). This shortage of cultural awareness gave Wal-Mart issues. For instance, with respect to the shopping of white goods (inexpensive, generic brands), customs in Brazil rule that they be delivered by the store, with those costs included in product prices (due to the smaller size of vehicles and city layouts). In the United States, however, tradition has it that Wal-Mart stores do not deliver at all (da Rocha & Dib, 2002).

In line with these contentions, Brazilian housewives, on a daily basis, listen to the radio when they are doing house chores. For that reason, radio advertisements would be a great outlet to reach and draw potential shoppers. Wal-Mart failed to utilise radio as a means for advertising its brands and products to its customers. Rather, the company unsuccessfully resorted to television and newspaper advertising. The percentage allocated to the total advertising campaign represents only 2 per cent of Wal-Mart's revenues. Although Wal-Mart collaborated with a Brazilian advertising agency, it did not grant the agency creative licence or freedom to blend advertising with inherently local qualities (Kotabe & Helsen, 2007).

Another problem was that the majority of Wal-Mart's brands and products were non-food items. Wal-Mart's product mix consisted too greatly of general merchandise rather than food items (Alexander & de Lira e Silva, 2002). This contrasted with the Carrefour retail chain, which dedicated less than 50 per cent to non-food items, whereas Wal-Mart allocated 70 per cent of its sales to non-food items. Wal-Mart eventually glocalised; it decreased the ratio of non-food items

from 70 per cent to 50 per cent of the total sales area (da Rocha & Dib, 2002). Even though Wal-Mart made the attempt to have a proportionate ratio of food to non-food items, the company's efforts did not initially reflect the market needs. For example, Wal-Mart's unawareness about Brazilian preferences concerning cuts of beef turned off many potential customers (Hays, 2004). According to Peck (2003), Wal-Mart decided to cater to the Brazilian masses and changed its policy with respect to cuts of beef.

Likewise, Wal-Mart realised that what is popular in Dallas, TX, does not necessarily work in Sao Paulo. Tanks of live trout have been replaced by sushi. American footballs are out; soccer balls are in. The ingredients for feijoadas, a mixture of beef and pork in black bean stew (Robinson, 2009), are available at the deli counter (Rodrigues, 2008). Wal-Mart is now aggrandising its assortment of fresh rolls in the bakery section (Dolan, 2004a). After Wal-Mart found that Brazilians frequently soak vegetables in vinegar solutions as a precautionary measure, many vinegar and lemon juice products were stocked up in shelves (Chang & Fang, 2007; Costa, Thomaz-Soccol, Paulino & Castro, 2009). This move indicates that Wal-Mart actively looks to increase its market diversity by catering to local tastes and differences.

A major effort toward glocalisation occurred when Wal-Mart changed its position toward organic food in Brazil. Originally, the Organic Consumers Association (OCA) claimed that Wal-Mart confused customers by overusing the label 'organic' on its brands and products. This left consumers perplexed as to what was 'organic' and what was not. The association was also worried that Wal-Mart was selling cheap organic food obtained from Brazil itself (a country where labour and environmental regulations are still known to be negligent) and not from the United States, where organic food regulations are more rigid. OCA also noticed that Wal-Mart was over-relying on organic milk farmed in factories at the expense of smaller, local Brazilian suppliers (Wrigley & Currah, 2003). After ten years, Wal-Mart finally concluded that organic growth was not a successful approach for growth in Brazil (Benson, 2004).

Presently, Wal-Mart is more attuned to its Brazilian consumer base by recognising the need for mainstreaming and tropicalising its product offerings. Brazil represents a southern hemisphere market where people consume less Gatorade and Minute Maid than cachaca, a kind of spirit distilled from sugarcane and the national drink of Brazil (St. Louis, Raub, Clark & Noble, 2008). Speaking of Brazil's favorite beverage, the price of a litre of cachaca is, on average, 90 centavos (about 40 cents). Wal-Mart included a great amount of cachaca on its shelves. Various spirits like whiskey and rum, two types of liquor appreciated by Brazilians, can be sampled freely in Bompreço, which, as mentioned earlier in this analysis, was acquired by Wal-Mart (Abramson et al., 2006).

Wal-Mart's glocalisation with regards to non-food items has also contributed to a wider acceptance from its Brazilian consumer base. For instance, Wal-Mart learned a valuable lesson in the fashion department. Because Brazil is in the southern hemisphere, it does not automatically follow the fashion cycles

headquartered in the northern hemisphere (Alexander & de Lira e Silva, 2002). Local stores in places like Visconde de Pirajá in Ipanema, a community in Rio de Janeiro, have the hippest boutiques, with the finest leather goods, sportswear, jewellery and other items (Marshall & Jenkins, 2008). Wal-Mart not only catered to Brazilian local practices by adding more of such chic products in its stores, but it also adjusted its prices to reflect Brazil's purchasing power. As such, a pair of jeans priced at \$19.99 in the United States is sold at \$9.99 in places like Sao Paulo (Rodrigues, 2008).

Lastly, Wal-Mart executives quickly figured out that the Brazilian working class ought to be the company's primary target group. The Brazilian working class is known to rely on credit in order to obtain certain types of products, a service that Wal-Mart did not offer. Adaptations were necessary. Consequently, Wal-Mart introduced postdated checks, a general practice in Brazilian retailing, where 46 per cent of all supermarket sales were done via postdated checks. Wal-Mart also engaged in partnership with a prominent bank for longer-term consumer financing (da Rocha & Dib, 2002).

Glocalisation Practices: Adapted Store Layouts

Wal-Mart made other mistakes in Brazil. Initially, store lay-outs were exact copies of those in the United States (Dolan, 2004a). For Brazilians, the aisles in its supermarkets were too narrow. Wal-Mart had not considered the fact that shopping in Brazil is an excursion that includes the entire family. Consequently, aisles needed to accommodate every member of the family, from the grandparents down to the little ones. Small aisles presented another problem to the shoppers whose bulk of their shopping occurs once a month on pay day (Almeida, 1995; Mayer, 2005). Wal-Mart adapted by widening the aisles (Selling to the Developing World, 2003).

Part of the globalisation of Wal-Mart was to replicate a large hypermarket format worldwide (Wrigley & Currah, 2003). Not only did the aisles need to be larger, but the entire supercenter needed to be bigger too, because of the greater number of food items bought by the typical Brazilian customer every time they visit the store. As a result, Brazilian stores today are 10 to 15 per cent larger than their US counterparts, with more room between rows of shelves to allow shopping carts to circulate more freely (da Rocha & Dib, 2002). Nevertheless, any new Wal-Mart store to be built will be smaller than supercenters in the past. Its new size will range from 140,000 square feet to 170,000 square feet. Castro-Wright said Wal-Mart has determined that smaller stores are more productive in terms of sales per square foot (Clark & Edelson, 2008). In 2008, Wal-Mart executives anticipated that they would decrease the square footage of units by about 19 per cent in 2009. This strategy aims at building more stores and, therefore, adding an additional 34 to 36 million square feet of retail space in 2009, in comparison with 42 to 43 million square feet of retail space in 2008 (Bustillo & Zimmerman, 2008).

New Wal-Mart stores in Brazil now allocate twice as much space to sell food as the US stores. As a precaution against confusion and theft, stores have one entrance, instead of two (Dolan, 2004a). In 2001, Wal-Mart opened its first *Todo Dia* store in Sapopemba, a region east of Sao Paulo. *Todo Dia*, named as such by Wal-Mart, is a low-priced neighborhood store (Kryzanek, 2008). Because Sapopemba is populated mostly by less affluent people (Caldeira, 2001), Wal-Mart realised that fewer items were needed. As opposed to a regular Wal-Mart store carrying 60,000 items, Wal-Mart's *Todo Dia* only sells 12,000 items. Because *Todo Dia* is a smaller store, its inventory is stocked directly above display shelves. Some commentators have observed Wal-Mart's capitalisation on the *Todo Dia* store format in that geographic area is a means of testing the Brazilian market for potential growth in other local and value-conscious neighborhoods (Kotabe & Helsen, 2007).

Glocalisation Practices: Management and Work Procedures

A major component of Wal-Mart's glocalisation strategy was to alter its US formula of work practices to conform to Brazilian corporate culture. For example, after identifying the need to hire local professionals, Wal-Mart is now head-hunting professionals from local competitors (Kotabe & Helsen, 2007). Recently, Wal-Mart executives hired Brazilian officials who were in high positions in other stores of the country's retailing industry. This movement has already led to an increase in retailing executives' bonuses (da Rocha & Dib, 2002). Since Brazilians are now hired in upper-management positions, recruitment of employees has been much better managed (Alexander & de Lira e Silva, 2002). This increase of managerial autonomy was advantageous for Wal-Mart in Brazil because of disparities in income and culture between US and Brazilian markets. After all, even today Wal-Mart in Brazil has not entirely grasped or implemented the concept of 'Management by Walking Around', Sam Walton's approach of getting out of his office, talking to employees and customers and even pitching in to help (Kahnweiler, 2009). An example of a bad management policy (as a result of intercultural differences) is a defective product mix and misallocation of store-space. Thus far, newly hired local managers in Brazil have performed well, based on store sales volume (Kotabe & Helsen, 2007).

Managers now have more freedom on a micro level. They fix prices below cost to simulate demand and drive up sales volume numbers. Thanks to Wal-Mart, 'price wars' are the most obvious outcome of intense competition (Kotabe & Helsen, 2007). Wal-Mart has also been triumphant in its reliance upon change agents (i.e., opinion makers or catalysts for change). There are people in Brazil who can, with their reputation, charisma, prowess, or excitement, influence the opinions of others. As we know, influence, in and of itself, does not correlate with title. Wal-Mart embodied Gladwell's (2002) tipping point, or the point in

which the momentum for transformation becomes inescapable in that Wal-Mart's primary focus was on gaining the support of Bompreço early adopters—the influential individuals, those naturally open to the Wal-Mart way. In turn, they recruited other followers: the early majority, the late majority and ultimately, the laggards. This lasted until Bompreço was ready for opting to be Wal-Mart (Krippendorff, 2008).

Another advantage for Wal-Mart to have a Brazilian upper-management system lies in the fact that employees are better able to accept beliefs that do not clash with those of their current belief system. This allows 'Wal-Mart in Brazil' to maintain a local identity. For example, going back to the Bompreço acquisition, when customers shop at various Bompreço stores, they may not even be aware that they are buying from a Wal-Mart-owned store. The only indicator of belonging to Wal-Mart is a small tag that reads 'Part of the Wal-Mart Family,' located underneath the Bompreço logo (Krippendorff, 2008). Wal-Mart in Brazil also managed to win internal networks. First, it did a study of the acquisition target's culture to gauge how similar it was to Wal-Mart's culture. Not surprisingly, it was found that prospective targets from different cultures are less likely to adopt the Wal-Mart way. Since Bompreço was already acknowledged in the Brazilian culture, it was not difficult for Wal-Mart officials to ask Bompreço employees to align with Wal-Mart's corporate culture. Therefore, what was required of them was not much of a leap (Krippendorff, 2008).

Second, Wal-Mart won internal networks by letting its employees choose accountability. Accountability refers to allowing someone to judge the actions of another person (Louis, 2006). It is most effective when enacted by the person held accountable. Wal-Mart was clever in giving its new Bompreço employees as much leeway as possible. Instead of indoctrinating them into the Bentonville, Arkansas way, Wal-Mart glocalised by spending a great length of time studying its foreign culture and eventually, inviting the new members into the fold (Krippendorff, 2008). Just like many nations in South America, Brazil has well-established trade unions (Haerpfér, Bernhagen, Inglehart & Welzel, 2009). Although Wal-Mart was reluctant to accept the existence of unions in its premises, it finally bent and reached an agreement with unions concerning specific workers' rights issues (Featherstone, 2004).

Glocalisation Practices: Logistics and Operational Procedures

As soon as it entered the Brazilian market, Wal-Mart was presented with a multitude of operational problems. For instance, the number of visitors was a problem. The quantity of people going to the store was so colossal that Wal-Mart executives resorted to regulating customers entering the store (da Rocha & Dib, 2002). Occasionally, Wal-Mart was forced to shut down its doors early due to sold-out merchandise. Along the same lines, after the opening, parking lot congestion was

typical during the initial days. In addition, in order to stall the influx of new customers to its premises, the store had to delay its advertising campaign (da Rocha & Dib, 2002).

Not only did Wal-Mart have issues with customers; it also had difficulties with respect to its relationships with suppliers. As already implied throughout this analysis, cultural differences were overlooked when standards of operations and logistics in US Wal-Mart stores were unsuccessfully applied to its Brazilian suppliers (Fernandez & Shengjun, 2007). The retailer-manufacturer relationship in Brazil is quite different from that in the United States. As such, oligopoly is what typifies the Brazilian industry; only a handful of companies control 50 per cent to 80 per cent market share of products consumed on a daily basis by the masses. This means that only those few large manufacturers hold most of the bargaining power (da Rocha & Dib, 2002). Although Wal-Mart had minimal branches, it capitalised on its 'future growth' blueprint to sway manufacturers into giving special discounts.

Wal-Mart's strategy did not work; when the store started to sell a wide range of products at a cheap price, certain manufacturers and local suppliers reacted negatively by refusing to sell to Wal-Mart and by refusing to provide discounts in exchange for delivery to its distribution centres. These manufacturers felt that Wal-Mart's practice of selling merchandise below cost was an unfair business practice and local retailers were encouraged to boycott by refusing the sale of leading brands from manufacturers that were perceived as being advantageous to Wal-Mart (da Rocha & Dib, 2002). By the same token, companies worked hard to neutralise Wal-Mart's actions. They took three major actions: (a) suppliers were pressured; (b) these supplies were threatened of legal sanctions; and (c) companies engaged in self-regulation. Overall, the result was that only 15 per cent of all merchandise (roughly 40 per cent of sales) got delivered to the distribution centre. Consequently, as much as 40 per cent of products were unavailable in the shelves at the supercenters (da Rocha & Dib, 2002). Wal-Mart also suffered an astounding 40 per cent stock-out rate in Brazil, in comparison to 5 per cent in the United States. The stock-out rate might have decreased since then, but the problem is not even close to being totally eliminated. Specifically, Brazilian suppliers are slow in using logistics technology, which makes computerised inventory management systems ineffective (Fernandez & Shengjun, 2007).

Yet another unexpected problem that Wal-Mart experienced was the reaction to the pace of execution regarding operations. Brazilian management, agitated at the pace of expansion, became frustrated with negotiations concerning local partnerships with suppliers. The traditional Brazilian expansion norms of a 'wait and see' approach to store development (Palmer, 2006) did not mesh well with the aggressive expansion pace typical for Wal-Mart stores in the United States (da Rocha & Dib, 2002). The rationale behind this notion is that Wal-Mart, not used to the patience required in a partnership venture, felt that the pace of expansion was moving too slowly rendering them with less control over the outcome of the business. This resulted in tension and altercations with business partners

(Palmer, 2006). Tensions over pace also seemed to be a problem in regards to shipping and having products stocked on time (Kotabe & Helsen, 2007). Constant traffic jams and well known accounts of bumper-to-bumper traffic on the streets of Sao Paulo prevented deliveries from reaching their final destination to both Wal-Mart stores and distribution centres in a timely and acceptable manner custom to strictures in the United States (Han, Kwon, Bae & Sung, 2002).

Despite the numerous problems that Wal-Mart faced, the franchise was successful in altering some deeply rooted Brazilian market supply practices. The company established the supply practices by increasing the volume of pallets used (90 per cent of all items are delivered on pallets) and the establishment of delivery deadlines (for a 100 per cent of all items delivered). In other areas, adaption to local supply practices was necessary to prevail (da Rocha & Dib, 2002). In a similar vein, Wal-Mart opened a new distribution centre, in a city called Barueri, in the Sao Paulo vicinity (Loiselle et al., 2003). Although Wal-Mart only had three rented distribution centres with limited capacity before acquiring the one at Barueri, this new facility boasts 35,000 square meters of storage space and is constructed on a 200,000 square metre land lot. This new distribution centre can accommodate goods or merchandise for 20 local stores at its current size. It also allows Wal-Mart to exert better control over supply lines and plan for future building expansion (Kotabe & Helsen, 2007).

Discussion and Future Directions

This analysis has demonstrated that the glocalisation of Wal-Mart in Brazil has redefined the nature of the retail structure within the region. Glocalisation has given Wal-Mart acquisition opportunities that would not be available had it pursued its aggressive Wal-Martisation strategy (e.g., organic growth). In the beginning, Wal-Mart was forcefully trying to impose its extensive gamut of US tastes and practices without taking local Brazilian consumers into account (Alexander & de Lira e Silva, 2002). From the onset (in 1995), Brazil presented particular cultural challenges. Yet, for the past few years, Wal-Mart has revamped its strategies and, consequently, achieved a sizeable share of the Brazilian market environment. Prospects for the future are optimistic for Wal-Mart in Brazil (Kotabe & Helsen, 2007).

This analysis has also shown that companies can misread things. Once a global behemoth decides to enter a foreign market, it should prepare to face resistance from the locals and from competitors in an unknown marketplace. Even with the largest financial backing at its disposal (in fact, it remains the largest in the world), Wal-Mart's path to global expansion can hardly be considered smooth. Over the course of time, Wal-Mart in Brazil has learned to adapt to the local market. Wal-Mart has grown to be 'a new organism', with new vital organs different from those of its Bentonville, AK headquarters (Krippendorff, 2008). As we have seen, the new vital organs have come to existence thanks to four competencies of glocalisation (i.e., adapted brands and products, adapted store lay-outs,

management and work procedures and logistics and operational procedures). A key argument in the glocalisation department was the importance for Wal-Mart to diversify by expanding new product-markets and moving away from certain product-markets. The broader product mix of Wal-Mart in Brazil became a major appeal to local consumers (da Rocha & Dib, 2002). Other glocalisation strategies include changes in retail practices, changes in store size and even changes in standard operational procedures (da Rocha & Dib, 2002).

Statistics have proven that glocalisation has made Wal-Mart a successful venture in Brazil. As a case in point, Wal-Mart's fiscal fourth-quarter profit increased by 4 per cent there; again, this rise happened in just three months (McWilliams, 2008). Now that Wal-Mart is triumphing in Brazil, it will dedicate a larger portion of its international budget to this nation, now widely regarded as an emerging market (Bustillo & Zimmerman, 2008). For future research, it might prove interesting to continue examining the role of glocalisation in corporations' attempt to conquer the globe. Specifically, the following questions need to be addressed: Is there a risk of trampling over what the local culture already has to offer in the quest to glocalise? Likewise, is there too much diffusion at the expense of the existing culture? And can a company like Wal-Mart be in danger of losing its identity—i.e., the one that made the company 'Wal-Mart' as we know it today—because the company increasingly modifies its strategies and practices to fit local cultures?

As Roudometof (2005) suggests, glocalisation provides a dual conception of cosmopolitanism: a situational 'openness' in a local milieu and a disconnection from local ties. It might prove useful to examine whether the latter—that is, the detachment—causes the local culture to become part of a global cultural osmosis (Quelch & Jocz, 2008) or cultural convergence (Booth, 2008). This type of research would provide a fertile ground for understanding the colossal corporate impact on local cultures—maybe to the point of somewhat eroding them—within an increasingly global environment. Conventional human relationships, groupings and identities wear down along with the progression of foreign corporate invasion (Boholm, 2003). Scholars have not yet quantified the impact of replacing traditional local markets (e.g., in a remote location) with global giants such as Wal-Mart.

The globalisation of retailing is a process that is both complex and ongoing. The venture of Wal-Mart overseas may cause a change—for good or ill—among local cultures but, as this analysis exemplifies, the company's application of glocalisation principles has improved its competitive abilities in the entire world. Truly, glocalisation provides the hope for success in the face of increasing global competition.

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