The uneven transformation of consumption spaces and the rise of new marginalities in Hungary

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The optimistic vision of a balanced socio-spatial development trajectory of the European economic space has been constantly challenged by the rise of new dimensions of socio-spatial inequalities and, recently, by the polarising effects of the global economic crisis. Inequalities emerged not only as income differentials but also as various forms of material deprivation, such as having limited access to basic goods, services, and housing and struggling with permanent financial difficulties. In this study, we focus on spatial processes produced by various institutional–corporate and administrative-bureaucratic–strategies that changed the 'material' conditions of consumption practices profoundly, before and after the crisis. The critical political economic concept that we employ allows us to consider consumption as a socio-spatial practice in which various (class, gender, family, etc.) social relations manifest, and, as a social act, are embedded into a 'material reality' of consumption spaces. Thus, we consider the on-going restructuring of consumption spaces and the related practices as manifestations of uneven development and the underlying (spatial) logic of capital. We seek to reveal the following: i) how localities were polarised by the influx of retail capital and the spread of new retail forms; (ii) if a shift towards a tighter control in retail and consumption enhanced or eased the unevenness of consumption landscapes; and (iii) whether the polarisation processes were accelerated by the crisis (the spatially uneven decline of retail investments and household incomes). To achieve these objectives, we rely on a combined methodology including the analysis of spatial statistics on retail restructuring and consumption in relation to corporate strategies and changing regulations. For the latter, we employ the content analysis of the relevant policy documents and media discourses as well as empirical results of fieldworks (interviews with executives) targeting various retail organisations. Our results reflect the role of retail capital–multiple territorial embedding–in driving uneven development during crisis through corporate strategies for protecting the spatially fixed assets of retailers. The retailers' spatial strategies should be understood as the manifestations of the responses to the crisis of the financialised Central and Eastern European (CEE) markets (declining demand, indebtedness, and flight of capital from peripheral markets) that differentiated consumers by income and by place of residence across Hungary. This process was also facilitated by the state through the parallel employment of an interventionist retail policy and a re-fashioned and socially selective redistributive system, which fuelled the emergence of 'deserving' and 'undeserving' consumer groups–marginalizing primarily the poor living in peripheral (mostly, rural) spaces within Hungary.

Keywords:
retail,
consumption,
uneven development,
socio-spatial polarisation,
marginality

Introduction

While the economic upturn of the early 2000s raised the optimistic vision of a balanced socio-spatial development trajectory in the European economic space, the in-depth analyses of the geographical distribution of wealth and risk across Europe suggested a more differentiated view (ESPON 2014). The enhanced flows of capital and the unfolding new spatial division of labour in the pre-crisis period produced new inequalities at the sub-national scale: household incomes and consumption became increasingly dependent on the labour market position as the welfare systems were replaced by the practices of the workfare state (TÁRKI 2009). Such processes produced a highly uneven socio-spatial 'landscape' within Europe that manifested at various scales (in metropolitan-non-metropolitan, urban-rural, regional-local inequalities) and differentiated the social spaces of the European periphery deeply and thoroughly (Ehrlich et al. 2012, Lang 2015, Stenning et al. 2011). Inequalities emerged not only as income differentials but also as various forms of material deprivation, such as having limited access to basic goods, services and housing, and struggling with permanent financial difficulties (utility bills and unexpected expenses) (OECD 2015).

The post-2008 downturn – that we interpret as a mechanism of neoliberal capitalism spreading the risks, and then the consequences of enhanced global capital flows to redistribute wealth in favour of capital at the expense of labour and poor (Hadjimichalis 2011, Harvey 2010) – polarised the highly uneven social spaces further. The crisis hit mostly the vulnerable social groups and peripheral spaces through capital extraction (debt crisis; downsizing productive capacities; devaluing household assets), enforced austerity schemes, that shrank collective consumption (Aalbers 2009, Harvey 2010, Hudson–Hadjimichalis 2014). The growing depth and scale of poverty were particularly shocking in the European periphery (in the East and the South), where an increasing pool of households was put at risk of getting even daily meals (TÁRKI 2014).

To understand how profound macroeconomic changes transformed the European periphery, in particular, how social and spatial marginality reinforced one another in context of neoliberal capitalism, we focussed on spatial processes produced by various institutional–corporate and administrative-bureaucratic–strategies that changed the 'material' conditions of consumption practices profoundly, before and after the crisis. The *critical political economic concept* that we employed allows us to consider consumption as follows: (i) a socio-spatial practice in which various (class, gender, family, etc.) social relations manifest (ii) a social act embedded into a 'material reality' of consumption spaces (Goss 2006, Miller 1999, Wrigely et al. 2005, Zukin–Maguire 2004). Thus, we consider the on-going restructuring of consumption spaces and the related practices as manifestations of uneven development and the underlying (spatial) logic of capital (Smith 1991) through which we can reveal the mechanisms of the reproduction of socio-spatial marginalities.

The above processes shall be discussed in the context of the Hungarian economy that we consider here as a laboratory of corporate strategies and regulative-bureaucratic experimentation in the European periphery (Hess 2004, Coe–Hess 2005). The profound changes in the organisation of production and distribution (capital and organisational concentration, enhanced networking, and spatial restructuring) stimulated by the liberalisation processes and the influx of retail capital (Nagy 2009b) were linked intimately to changing practices and perceptions of consumption. Purchasing goods and services was re-contextualised in the emerging capitalist society – connecting citizenship, social status/identity, and consumption – backed by the unfolding of the 'cultural industry' of global capitalism[1] and domestic discourses dominated by the principles of Neoliberalism (Szalai 2006). Consumption practices were researched intensively – particularly in sociology and marketing studies – with a strong focus on consumption as an indicator of social restructuring and a

[1] We refer here to Adorno's concept of cultural industry as a system functioning to hide the social relations of capitalist production and to control the consumers by producing and attaching meanings and values to goods (see Jameson 1974).

source of identity/self-reflection. These studies have highlighted the decisive role of social status (in our approach: class position) in consumption practices and the ongoing differentiation of the society along class and non-class (age, urban/rural context) related characteristics in Hungary (Hetesi et al. 2007, TÁRKI 2008, 2014). However, the analyses were abstracted from their material (spatial) context, and thus failed to consider the wider social context (the 'institutional field'[2] defined by relationships of the state, retailers, NGOs, and consumers) in which consumption takes place. Meanwhile, recent geographical analyses of retail and consumption were limited mostly to the spatial organisation of consumption practices and were scarcely linked to theoretical discourses on uneven development and social relations of capitalism.

In this study, we provide an overview of the spatial restructuring of consumption spaces to shed some light on the role of spatial logic of retail capital and the related regulative frameworks in the (re)production of socio-spatial marginality in a crisis-hit peripheral economy. We seek to reveal the following: (i) how localities were polarised by the influx of retail capital and the spread of new retail forms; (ii) if a shift toward a tighter control in retail and consumption enhanced or eased the unevenness of consumption landscapes; (iii) whether the polarisation processes were accelerated by the crisis (the spatially uneven decline of retail investments and household incomes). In this way, we enrich consumption studies by focussing on the institutional-spatial contexts of purchasing goods, and contribute to the political-economic concept of spatial inequalities and marginality by embracing consumption in the analysis as a set of social relation(s) and as a spatial practice.

In the following sections, we have conceptualized retail capital and consumption as spatial processes in a political economic approach to understand how they contribute to uneven development in the specific context of a peripheral economy (highly contested/an emerging regulative system) (chapter 2). The restructuring of the retail sector/concentration and centralisation processes in relation to changing regulations and global capital flows shall be discussed in chapter 3 and the spatial manifestations of such processes analysed in chapter 4. The key findings on role and relations of various market agents are summarized in chapter 5.

Uneven development and the political economy of retail and consumption – Conceptual framework

Consumption and retailing have been considered mostly as separate realms in domestic academic discourses, and conceptualizations that relate to retail restructuring and changing consumption practices as spatial processes are particularly scarce–largely due to the belated 'spatial turn' in social sciences. In the following

[2] Bourdieu, 1984.

section, we consider retailing and consumption as sets of social actions that are tied intimately, and, going beyond the self-evident relationships (e.g. retail shops as scenes to consumption acts), we interpret them as momentums of the productive process in which capitalist social relationships are manifested. This critical political economic approach–rooted in Marx's widely discussed and contested concept of commodity fetishism–puts the underlying systems of exchange and the role of retail in the circuits of capital in focus (Goss 2006, Wrigley 1996). Accordingly, the strategies of retailers, which are driven by the logic of capital (efficient use of resources, increasing productivity, etc.), should be analysed in the context of the production process (Clarke 1996, Goss 2006): retailers exploit their role as a mediator to accelerate the circulation of capital to enhance the profit rates (Dicken 2007, Wrigley et al. 2005). Their strategies rest on the extension of control over production as well as on the re-definition of the role of consumption by creating new aesthetics and institutional contexts for producing demand (Zukin–Maguire 2004) and introducing organisational and technological innovation.

In this approach, space, various social interests, activities, and interpretations are mutually constitutive. Consumption spaces, 'where everyday life meets the machinations of capitalism' (Clarke 1996: 295), are not just the products of retailers' strategies but of a wide spectrum of social relationships (regulative environments, suppliers' networks, local politics, etc.) that corporate strategies are embedded into (Wrigley et al. 2005).

To understand the mechanisms that produced a highly uneven consumption landscape within Hungary, here we focus on two powerful groups of agents as drivers of changes: (i) retailers and (ii) the state.

(i) Retailers produce 'material' conditions of consumption by organising global flows of goods and commodity chains; in addition, they act as mediators of related ideologies by constructing spaces for shopping in a rapidly changing market. Although, it is a highly diverse assemblage of various agents, retail capital has its distinctive spatial logic. Retailers are strongly dependent on their territorialized relationships–on their local consumers, on the regulative-institutional context to which they have to adapt through a permanent learning process, and on their (increasingly transnational *and* regionalised) supply networks. Moreover, retailers' assets majorly include spatially fixed elements (shops and logistic infrastructure) that make market exit a costly step. Thus, highly selective location planning and bargaining on (national/local) regulations are key elements of spatial strategies of retailers.

(ii) The state is the primary agent that controls the conditions of (retail) capital accumulation by regulating the relationships of market agents. The global expansion of retail capital challenged state institutions that responded by introducing new and tighter regulations on FDI, new retail forms, land use, competition law, and international trade (Coe–Hess 2005). Meanwhile, regulation was also rescaled in supranational/national and central/local state nexus (the consumer protection and competition law at the EU-level and the control of retail restructuring through local land use regulation unfolded across CEE). It was a contested process shaped by a series of bargaining (state/various groups of retail capital) and conflicts of various interests (state/capital; local/central state; between various groups of retailers), which was complicated further by the inner logic and internal struggles of state bureaucracy (Jessop 2004). In CEE, weak intermediaries and paternalistic relationships in the state bureaucracy led to the gradual emergence of a contradictory regulative environment and institutional practices (Hess 2004) that contributed largely to the prevailing (global) centralisation trends in retailing and in the production of consumption spaces.

The spatial logic of retail capital and the deficiencies of the regulative system produced a highly differentiated consumption landscape in Hungary. The process was embedded within the uneven development of the European economy and its emerging peripheries, stimulated by the liberalization of trade and capital flows (Hadjimichalis 2011) and manifested as a consumption gap between the European core and the Eastern periphery[3], as a debt crisis that hit Hungary, particularly from 2009[4], and as being dependent on retail transnational corporations-led (TNCs) production networks (Keller 2008, Nagy 2012, OECD 2015). However, the spatial organisation of consumption added a new–yet scarcely discussed–dimension to the on-going socio-spatial differentiation at sub-national scale: the centralisation processes in retailing (enhanced by the recent crisis) marginalized rural spaces, particularly, the low-income and immobile social groups living in those spaces.

In the following section, we endeavour to give an overview of the changing socio-spatial context of consumption in the pre-/post-crisis times to understand how uneven development and marginality 'materialise' in the conditions of everyday life in various spaces. For this, we employed a multi-tiered methodology. We relied on the analysis of macro- and regional databases of the Central Statistical Office and of GfK Hungary on consumption and retail to explore the spatial and temporal changes in and the causal relationships of consumption patterns, retail restructuring, and social macro-processes. The analysis focussed on local scale to reveal the expansion of marginalised consumption spaces in line with the centralisation and 'thinning' of the

[3] The proportion of households reporting problems to get food and deal with unexpected expenses is extremely high in CEE and in Southern European countries before the crisis (Ward et al. 2009). The recent results of a recent research project (TÁMOP-4.2.2.A-11/1/KONV-2012-0069) project focussed on Hungary suggested that rural households in marginalized spaces are in even worse situation (40% struggle to get food and 85% cannot deal with unexpected expenses).

[4] Here, we interpret debt expansion as a mechanism through which consumption is stimulated to maintain the profit rate, while, in the time of crisis, capital is withdrawn from risky/underperforming sectors and regions hitting vulnerable social groups and peripheral regions heavily (Harvey 2011).

network of retail centres in the crisis period. The discussion of the uneven post-crisis recovery rests on the regional and municipal-scale analysis of incomes, purchase power, and retail sales. The data was processed in cartograms by using RegioGraph software of GfK GeoMarketing.

To understand power relations (capital/state; national/domestic capital; labour/capital) in the retail sector that shaped the material conditions of consumption, we analysed relevant acts and policy documents as well as related news available in the electronic media and the key agents' (OKSZ, Kisosz, major retailers') websites. We focussed on the way the power relations manifested in the content–using pre-defined categories based on the relationships of market agents–and the way they were interpreted and responded to by retailers, to understand discursive context of the regulations. Changing regulations and their impact on corporate strategies have explanatory power for the reproduction of socio-spatial inequalities in consumption and its material conditions. The contextual analysis also rested on a series of empirical studies, mostly semi-structured interviews with corporate executives[5] and local retailers[6], focussing on business strategies in CEE/Hungarian retail markets, with a major emphasis on location policy, changing regulations, and corporate responses to the crisis.

Capital flows, regulation, and restructuring in the retail sector

The emerging economies of Europe have been scenes to growing retail investments as well as to corporate experimentation since the mid-1990s. CEE markets–being transformed dynamically by the privatization and restitution processes as well as by the domestic enterprising rush–were targeted by retail TNCs that accelerated centralisation processes in terms of capital, organisation, and spatial processes. Transnational corporate strategies employed in the European periphery were embedded within a global restructuring of the sector, fuelled by a sluggish demand and increasingly competitive market conditions in the core economies, to which key market agents (e.g. Safeway, Ahold, Delhaize, Tesco, Carrefour) responded by improving efficiency (IT-based reorganisation of flows), innovation (e.g. introducing new retail forms), and transnational expansion (combining organic growth and M&As) from the late 1980s. They entered the rapidly liberalised and inconsistently regulated, yet risky, CEE markets to exploit retail growth potentials and property markets that produced high yields (over 10%) in the late 1990s (Colliers International

[5] The interviews were conducted in 2004-2006 and 2008-2011 within the Bolyai postdoctoral program (Hungarian Academy of Sciences).

[6] The interview series were part of the project supported by the National Research, Development and Innovation Office grant OTKA/109296 (Institutional and individual responses to state restructuring in different geographical contexts).

2007, 2014). The latter was a key move towards improving corporate performance spoiled by sunk costs[7] in core markets and inducing spatially selective strategies with a strong urban (primarily, metropolitan) focus. The expansion of retail capital was stimulated by the financialisation of the retail sector–its increasing dependence on financial investors and the growing pressure to get high returns[8]–and household consumption through extensive lending (2000–2008) (Baud–Durand 2011).

The retail market of Hungary was transformed largely by the above processes, such as the growth and spread of investments and series of innovations that made the domestic market increasingly contested and uneven from the early 2000s (Nagy 2009a). The 2000–2008 period should be considered as the peak of retail investment and restructuring that was fed largely by global capital flows (based on cheap lending) in retail and property development as well as by the growing domestic demand. The latter was boosted by raises in the public sector and and in the minimum wage level (2002, 2003) and by extensive lending that was exploited by households to maintain the consumption level after fiscal restrictions (2004, 2006) that caused a decline in social transfers and public sector wages (Bauer et al. 2013, Szívós–Tóth 2013).

The retail investment boom stimulated profound changes in the sector and beyond. Major retail corporations' strategies stimulated a rapid concentration in terms of capital and organisation through the following:

(i) Expansion across space and various segments of retailing and related services and the efficient use of new facilities (e.g. providing logistic and IT-services to domestic retailers through buying groups, franchise systems, etc.);
(ii) Gaining control over the production process by organising and controlling supplier networks at European/CEE scale, introducing own-label goods, and building own production bases by exploiting domestic capacities (Nagy 2014a);
(iii) Adapting to the changing social context of retailing, such as tighter regulations and changing consumption patterns through market repositioning, enhancing the selection of goods, and facilitating organisational innovations.

The expansion was reflected by the growing share in investments of retailers–particularly from 2001–that reached 42% (on average) in the 2001–2008 period. The growth took place in a period when the overall capital influx was growing rapidly in the sector. This process was a topping (a) in the pre-accession years that coincided with the major retailers' expansion targeting small- and medium-sized towns across Hungary (240–260 bn HUF/year), (b) in the 2007–2008 period (350–355 bn

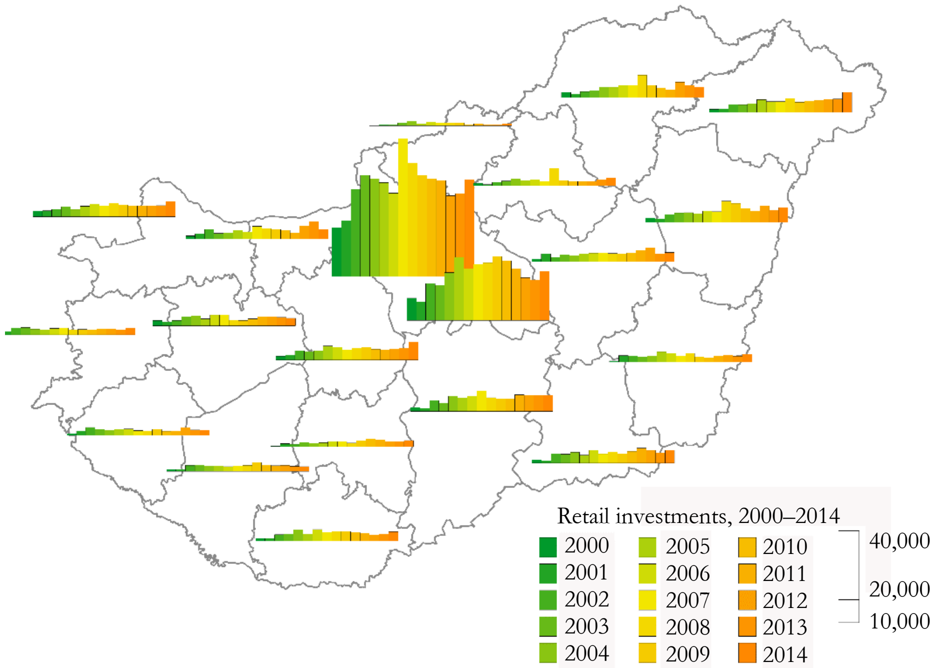
[7] Sunk costs are unrecoverable investments in case of market exit (Wrigley 1996). However, in our extended definition, crises-hit property market also produces sunk costs, as market processes are devalorising spatially fixed capital (e.g. the retail store). It is a spatially selective process.

[8] Since retail developments were linked to property market processes intimately due to its strong spatial embedding, financialisation induced aggressive expansion and raised a major concern with location choices contributing spatial (urban) concentration of investments—as it was suggested by property market reports and our interviews with retail executives.

HUF/year), when the expansion of new entrants, such as the discounters (Aldi, Lidl) in the food sector, pressed 'embedded' agents to respond through new investments and reorganisations[9] (Figure 1). By 2008, foreign capital accounted for a share of 49.4% of the total retail investments. International investors' activity followed a hierarchical and spatially centralized spatial pattern, with a persisting dominance of Budapest and Pest county, and new consumption spaces (hypermarkets, shopping malls) within non-metropolitan areas (KSH 2008).

Figure 1

The spatial distribution of investments in retail, wholesale, and repair (sector 'G')



Source: Central Statistical Office, Hungary, edited by G. Dudás.

Domestic retailers–running more than 90% of the domestic store network in 2008–were challenged and selected by market restructuring and series of innovation that transformed the ways of sourcing and selling. Despite the growing demand, the number of domestic enterprises declined by one-third (over 56,000) in the 1997–2008 period.[10] The trend hit mostly individual entrepreneurs: the number of stores run by

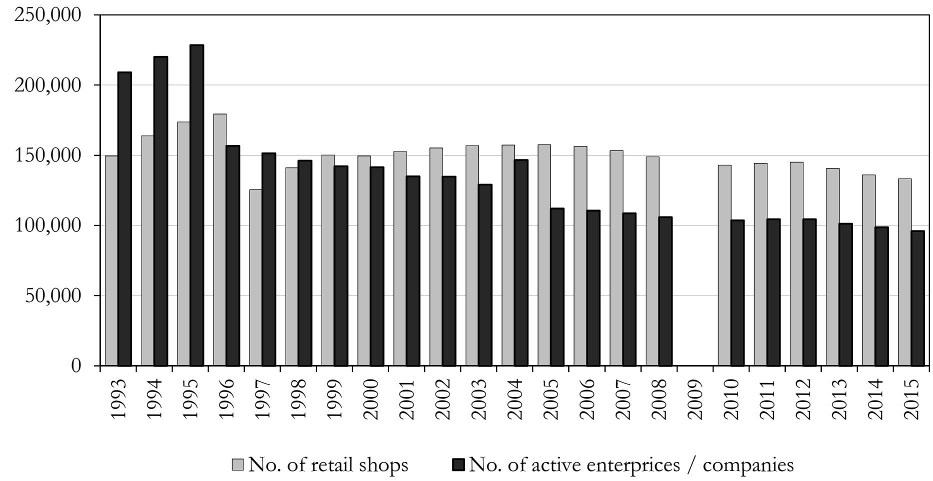
[9] For e.g. Tesco 'small hypers' and the Express shops; taking over the Tengelmann Plus network by Spar; launching the CBA 'Cent' and 'Prima' network; mushrooming of web shops, and related services in the whole sector.

[10] The year 1995 marked the peak of retail enterprising in Hungary, with over 230.000 registered enterprises in domestic market.

this group shrank by more than 18,000. Meanwhile, small- and medium-size companies that were still standing on the contested market were able to grow and expand by organising small store networks, joining buying groups, and investing in IT-systems. Thus, the centralization process that dominated the boom period manifested in terms of capital, organisation, and space, such as in the control taken by a shrinking number of corporate and partnership companies over the store network, in the constantly growing retail floor space. It also manifested in the rise and expansion of corporative organisations that aimed to gain control over market processes–while the first major market exits of TNCs occurred (e.g. Julius Meinl, Tengelmann/Kaiser's, Rewe/Billa) and the number of small family businesses was declining rapidly (Figure 2).

Figure 2

Number of shops and enterprises in retail sector (1993–2015)



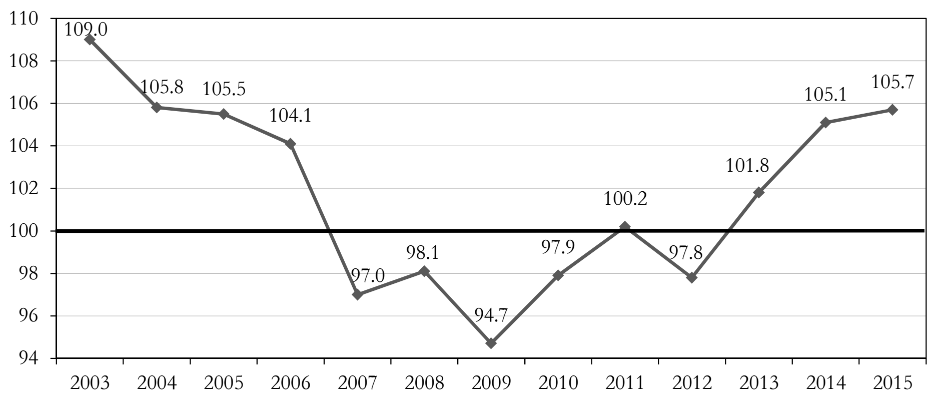
Source: Hungarian Central Statistical Office, Hungarian Statistical Yearbook, 1993–2015.
Note: Data from 2009 is missing.

Although, the above processes were perceived and problematised in professional discourses, the regulative framework remained inconsistent until 2005. In the discussed period, Hungarian governments acted as facilitators of the flows and operation of retail capital in a neoliberal manner, supporting foreign investments, liberalising trade, and delegating regulative issues to the local state. The regulation was overly bureaucratic and fragmented, and meanwhile, deficient on key issues, such as consumers' protection, market dominance, and suppliers' status. The new Act CLXIV of 2005 on Retail regulated consumer-retailer as well as supplier-retailer relations, defined the scope of state interventions, and set up a more or less consistent institutional framework for sectoral policy. Such steps reflected the priorities of the common (EU) economic policy particularly in product safety and fair market conditions. The rescaling of retail policies in the pre-crisis period–the EU safeguarding on market transactions and consumers' protection in new member states–and the national regulation produced complex and cost-raising conditions for daily operations, while the unfolding liberalisation of flows made the market increasingly contested. Thus, re-regulation contributed to the on-going centralisation processes in the domestic market[11]–favouring agents with substantial capital assets to exploit opportunities of European (global) sourcing and to adapt to changing regulations–that could not be counterbalanced by governmental (EU/national) funding that was provided for SMEs for small scale developments in the discussed period. Since regulations were focused on macro-level, the centralisation processes manifested in the rise of local and regional oligopolies/monopolies in peripheral spaces in the early 2000s.

The 2008/2013 crisis has changed the macro-context of retailing and consumption profoundly. The mechanisms of the financialised global economy drained household assets–the net financial assets of Hungarian households fell by 15% (1800 bn HUF) in 2008/2009 due to the revalorization of foreign currency-based debts (Gfk Hungary 2012)–and threw them into debt, while labour incomes were slightly declining/stagnating and the access to bank loans was strictly limited by tighter regulations and risk-reducing strategies of foreign shareholders of the banks across CEE (Bauer et al. 2013). The households responded to the crisis by paying debts, reducing consumption, and delaying investments, and it was evident in the 14% decline in retail turnover (2006–2013) and a slow consumption recovery from 2014 (Figure 3).

Figure 3

Changing level of consumption before, under, and during the crisis (2003–2015)(previous year=100)



Source: Hungarian Central Statistical Office, Hungarian Statistical Yearbook, 2003–2015.

[11] For example, in the food sector, market exits of retail TNCs rather reinforced centralization trends through chain/store takeovers, even though domestic capital benefited from the changes as the 'winners' (CBA, Coop) held oligopolistic position in the national market.

The scope of governmental policies in crisis management was limited by state debt and the austerity pressures–the consequences of earlier policy rescaling processes and the mechanisms of financialisation–the dependence of the national economy on global capital flows, and the unfolding social conflicts stemming from the debt crisis and economic decline. The enhanced regulative activity of the Hungarian central government from 2010 reflected such limits, and the strategy of the political elite to manage state debt, recover domestic consumption while getting control over market relationships–between various groups of cap forms of capital (bank/retail; national/domestic retail), consumers and retailers, and suppliers and retailers–and recast the regulatory competences within the state itself (local vs. central state). Economic growth and domestic capital accumulation was supported by the campaigns for enhancing the consumption of domestic products through bargaining processes (state/retailers) and the introduction of a complex administrative system for controlling the origin of goods; in addition, it was supported by stricter regulation of retailer-supplier relationships[12]. Such steps along with redefining market domination (2014), limiting the construction of large-scale retail facilities through strict (and non-transparent) central government control (2011), introduction of taxes (2011–2013), and new and expensive elements of administrative control[13] primarily hit the retail TNCs that–in government rhetoric–were supposed to improve the market positions of domestic retailers. Nevertheless, the enhanced state control and its costs (e.g. setting up the online cash register system), the introduction of new monopolies (e.g. in the tobacco trade), the sectoral ('crisis') tax, and the series of institutional reforms (e.g. in the cafeteria system) made the domestic market non-transparent and enhanced the costs of all retailers.

Although, the central state extended its control over flows of goods and raised tax revenues, re-regulation was a never-ending bargaining process between various groups of retailers and the state. The latter had to refashion regulations occasionally (in several cases, due to EU pressure) and make compromises–favouring capital interests at the expense of labour, as per the renewed Act on Labour in 2012, the poor (reducing state debt through cutting state transfers back), or other capital forms (producers, banks). Consequently, re-regulation selected domestic retailers rather than improving the conditions of capital accumulation for them, and this selectivity was spatially uneven due to the increased costs and polarising effects of re-regulation on business conditions in marginalised spaces.

Tighter regulation and declining demand challenged retailers in various ways. Powerful market agents responded by lobbying and bargaining for tax reduction and reducing administrative costs, and mobilising relational capital on the 'particularistic'

[12] Supporting domestic producers during the crisis period was not alien to core economies either; moreover, 'fair' retailer-supplier relations have also been in the focus of EU legislation since the last 10 years.

[13] For example, the costs of controlling the origin and trading of food; or the electronic system of following the flows of goods along with the HuGo that hit major retailers with centralised sourcing and logistics.

Hungarian market[14]; in addition, operating professional bodies facilitated transparent business conditions (OKSZ, Áfeosz). In the crisis period, corporate strategies were also re-fashioned by focusing on:

– Exploiting economies of scale by extending store networks, e.g. by franchising (Áfész, Spar);
– Economies of scope by diversifying into new retail segments (Tesco Express, Spar City, CBA Cent/Príma, etc.), combining traditional forms with enhanced e-tailing (omni-channel retailing), and introducing a highly structured offer targeting various consumer groups;
– Stronger spatial embedding–while bargaining with suppliers to share rising regulation-related costs (e.g. in quality control);
– Carefully designated development focusing on prime locations; in addition, less investment in construction and more in organisation, IT, and innovation.

Retail restructuring was also shaped by market exits involving powerful agents in all segments (Delhaize, Tengelmann, Bricostore, Electroworld, etc.), and a high number of small-scale businesses (over 10.000), mainly, in the daily goods' (FMCG) market (Figure 2). This shrinkage was associated with declining investments in the sector (−20%) and a falling share of FDI (from 49.4 to 34.6%) until 2013 (Figure 1). The performance of the sector improved from 2014 due to a slight improvement in demand and the adaptive strategies of retailers in the re-regulated market. However, likely, the growth in turnover was also generated by enhanced information on retail transactions (the introduction of the online cash register systems), which should be researched in-depth to understand the drivers of retail dynamics.

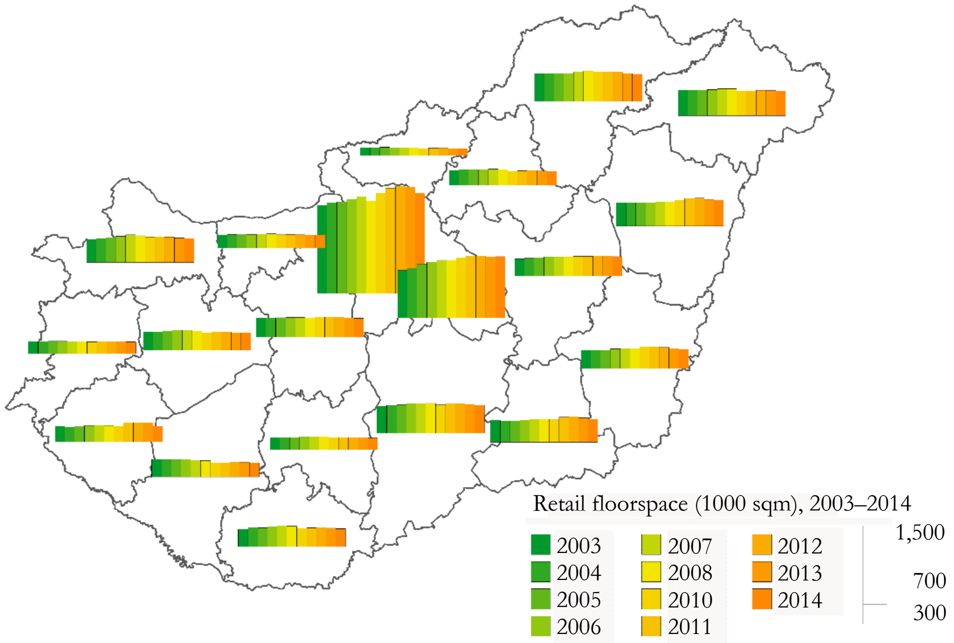
The crisis and regulative changes accelerated centralization processes and the polarisation of consumption spaces. The store network had been shrinking by 25% between 2006 and 2015, and this stock was run by a shrinking number of enterprises; the decline was fuelled not only by the failures of (over 13.000) small family businesses but also by closing down of stores run by small companies (over 2.600 shops) including local and regional store chains (mostly the ones running 2–5 shops). Capital and organisational concentration resulted in a centralisation of consumption spaces: the gross retail floor space fell to the 2005-level by 2015, while the average store space rose from 103.6m^2 to 124.4m^2 (Figure 4). New openings and takeovers that followed market exits by major retailers were spatially selective and concentrated mostly in urban spaces of high value, following the spatial logic of retail capital to minimise potential sunk costs. The process was reflected by an increasing focus on metropolitan areas, the revival of main shopping streets, and growing concentration of foreign retailers in malls and hypermarkets (Colliers International 2014, KSH

[14] Particularistic markets are characterised by weak state mechanisms to regulate market processes in a consistent and transparent way as various groups' interests, e.g. in CEE and Latin America (Hess 2004), overwrite the conditions constantly.

2008). It was also reflected through the abandonment of stores in peripheral rural spaces, including their urban centres (Picture 1), and the growing urban-rural differences in the densities of retail and related services across Hungary, as it is discussed in the following chapter in detail.

Figure 4

The spatial distribution of retail floor space at NUTS3 level



Source: Central Statistical Office, Hungary, edited by G. Dudás.

Picture 1

Closed supermarket in a peripheral region (Mezőkovácsházai járás, 2014)

Source: Erika Nagy's photography.

Socio-spatial polarisation and marginalisation in consumption:

Changing regional patterns, networks, and hierarchies

The pre-crisis period was characterised by a strong metropolitan focus (Budapest and its suburbs) of retailers' location strategies and capital flows (Nagy 2005). This spatial pattern recovered in the post-crisis time reflecting the security-seeking policy of investors for the crisis-hit CEE markets (Nagy 2009b). Retail capital targeted non-metropolitan areas between the years 2004 and 2008 in the increasingly relaxed institutional-regulative context–a contested market reflected by the declining yields of the commercial property markets in CEE metropolises (Colliers International 2007). The landscape of retail investments was highly uneven outside the Budapest region and it was shaped largely by major developments (malls, hypermarkets, DIY and discount stores, logistic centres, etc.). Northwest Hungary received major capital influx earlier, while developments in East and South Hungary took place a few years later, ending in the initial years of the crisis. It was only the more well off north-west region that recovered its status in capital flows soon after the crisis in non-metropolitan Hungary. The spatial distribution of investments had no strong correlation either with purchase power or with other socio-economic indicators at NUTS3 scale. The investments' spatiality (Figure 1.) reflected corporate location strategies that followed rather hierarchical than clear regional patterns and were shaped by local as well as by intra-firm factors (Nagy 2010).

The investment activity at county and local scale depended largely on shopping mall and hypermarket developments. Hungary entered the first phase of mall projects during the 1995–2000 period (40 new units). The primary targets were the capital city, emerging edge-cities around Budapest, and the largest regional centres. In the second phase (2001–2009), 73 new projects were completed, focussing on primary and secondary urban centres outside the Budapest region. The declining share of Budapest reflected the decentralization process: in 2000, over half of the malls were located in the Budapest regions, and its share fell to 40% by 2009. The process was stopped by the crisis and, lately, by the introduction of tighter national regulations on land use. The recent recovery was focussed on the Budapest metropolitan area, reflecting the trends of the highly contested CEE markets (Nagy 2014a).

The hypermarket network was expanding as dynamically as the malls (the number of stores rose from 44 to 170 between 2001 and 2010). The competing international chains (Tesco, Spar, Auchan, Cora) and domestic actors were seeking to get a full coverage of the market in the heyday of retail investments. The global crisis ended the expansion resulting in market exits (Delhaize/Cora). However, it has not brought major spatial restructurings in the segment. Recently, malls and hypermarkets are operating in almost one-third of the urban centres in Hungary[15], and the Budapest metropolitan area still holds its share (about 30% of the stores). The slowdown reflects the shift in corporate strategies towards security, efficiency, and organisational diversity.

The above trends reflect an on-going centralisation of retail and consumption spaces. The depth of socio-spatial polarisation and the marginalisation of various consumer groups can be tracked clearly at local (LAU2) scale. A constant and overall decrease could be observed in the number of stores in all the municipalities with non-urban status[16]: the number of retail shops per municipality fell from 15.4 (1994) to 8,0 (2013). Smaller places were affected more heavily; while the number of retail stores was increasing at macro-scale until 1999, municipalities with less than 2000 inhabitants[17] had not been targeted by any large scale developments and the number of shops per municipality declined from 8 (1994) to 5 (2014).

The shift towards an unbalanced spatial structure of consumption spaces was reflected by the increasing number of localities with no retail services as well as by emerging monopolistic and oligopolistic (2–5 shops[18]) local markets. Today, this group of settlements has a very limited supply of locally available goods, high retail prices hitting immobile social groups, and higher transportation and time costs affecting the mobile groups. The number of villages without any shops increased from 40 (2003) to 318 (2015); such places were concentrated in South- and West-Transdanubia and North-Hungary–overlapping with rural areas dominated by small villages (less than 1000 inhabitants). As a result of the constant decline, the share of such municipalities with no services rose from 42% to 51% in the discussed period. The process led to i) a spatially more compact areas of marginalised markets; ii) an increasing share of places with no or a single retail shop; iii) and a growing number of marginalised local markets in regions with higher share of urban population (Great Plain) or with higher-income level (Northwest-Hungary).

The food market was affected by similar trends and spatial patterns, apparently marginalising consumers through their daily practices in the discussed regions. Additionally, the villages around the capital city and in the Great Plain were also 'vacated'–and emerged as scenes to emerging oligopolistic markets–by the concentration of daily goods' retail floor space in major cities (Figure 5). The spatial restructuring of the non-food retail market had a similar yet more concentrated pattern that was polarised further during the crisis (2006–2014).

[15] At the beginning of 2016, there were 347 settlements with township legal status.

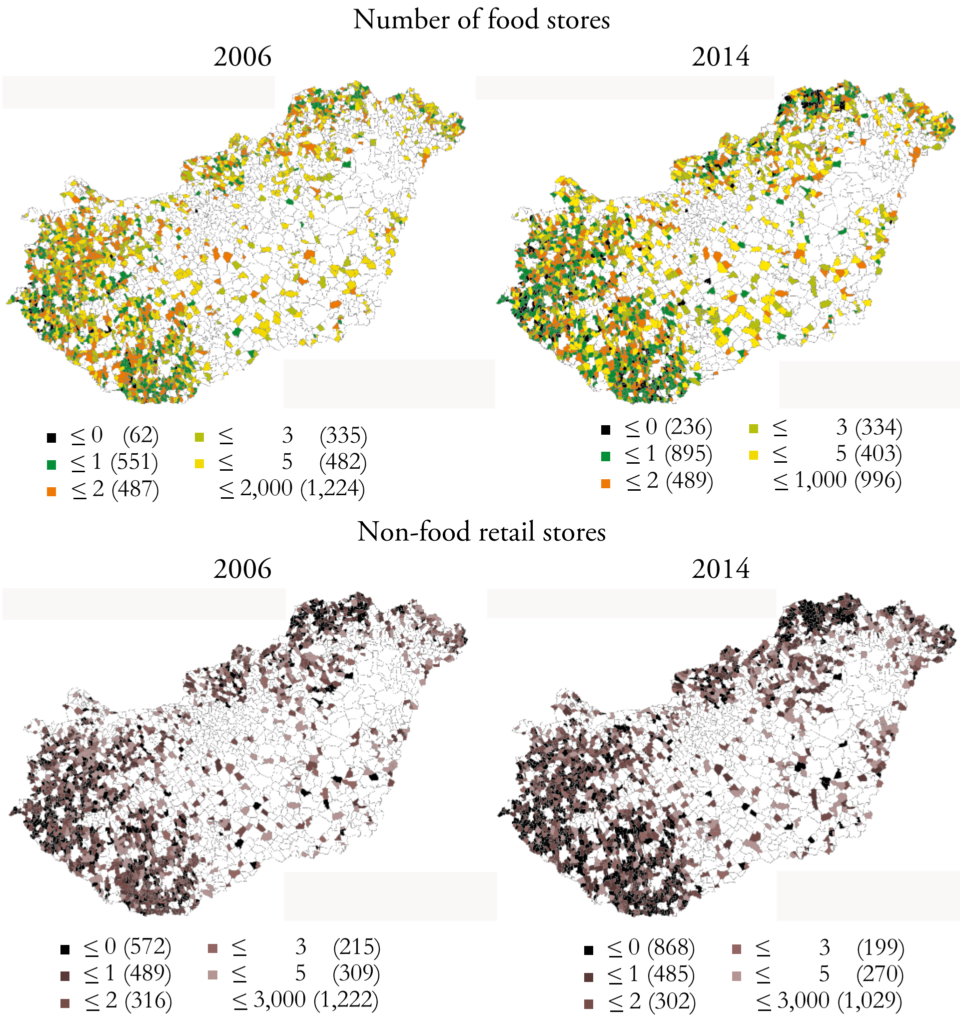
[16] The number of villages (by legal status) was 2920 in 1994 and 2809 in 2015. Many former villages got the legal status of 'town' in the investigated period; additionally, new independent municipalities were also established.

[17] The overall number of small settlements under 2000 inhabitants was shifting between 2347 (1999) and 2408 (2015), depending on the actual number of inhabitants in certain LAU2 units.

[18] Including several food shops, at least one providing clothing (often second-hand), a shop for farmers, and several general stores.

Figure 5 a); b); c) and d)

Spatial distribution of retail 'deserts', monopolistic, and oligopolistic markets in food and non-food sectors in 2006 and 2014



Source: Based on data of Hungarian Central Statistical Office County Yearbooks, 2006; 2014., edited by: G. Dudás.

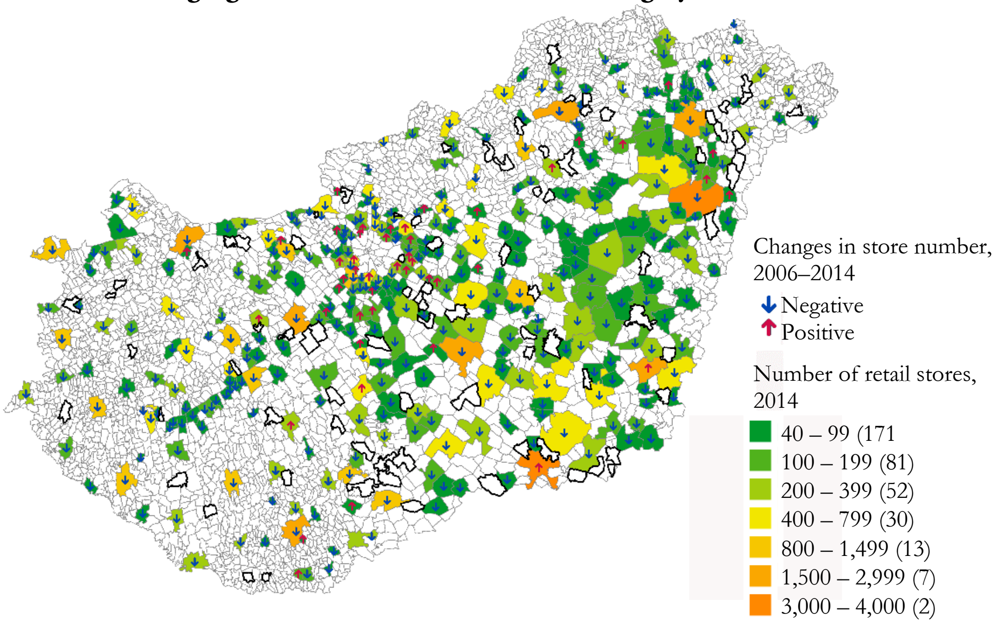
The structural changes in the retail sector redrew spatial hierarchies in consumption. In our earlier research (relying on data from 1996), we defined 40 shops per municipality as a threshold for being a central place in terms of scale and diversity (Nagy 1999).[19] We repeated the research at the peak of retail rush (2006) – keeping

[19] We refer here to Christaller's term. (Christaller 1966).

the same method and threshold for obtaining comparable results – and we identified 436 retail centres. (Nagy–Nagy 2008) However, by the end of the crisis, we found only 355 centres (dominantly, with town status) remaining. The changes within the group were substantial: there were 'newcomers' (mainly near major county towns and 10 municipalities near Budapest) benefiting from suburbanisation processes. The moderate decrease in the number of stores did not change the central role of major and medium-size county towns. Meanwhile, one-fifth of the former (2005) places were missing from the list, and the majority of smaller centres lost shops both in the food and non-food sector, which weakened their central functions. This process, along with the increasing number and spread of marginalised retail spaces, raised a major problem; the declining small retail centres were supposed to provide daily and non-daily goods for the surrounding, increasingly marginalised localities, and consumers. Thus, the scenario inevitably led to further polarisation.

Figure 6

Changing structure of retail centres in Hungary, 2006–2014



Areas bounded by bold black lines indicate the municipalities that did not reach the 40-shop threshold, and thus failed to get the consumption centre status by our definition.

Source: Based on data of Hungarian Central Statistical Office County Yearbooks, 2006; 2014., edited by: G. Dudás.

The differentiation of the retail network hit various regions differently, such as Transdanubian regions with high share of small villages–where the network had been scarce even before the crisis–and North Hungary as a whole sufferd from a thinning of consumption centres.

Explaining spatial patterns: Consumption, incomes, and poverty

The growth of consumption fuelled by rising incomes and later by bank loans stopped before the crisis and new trends emerged including a renewed focus on household consumption strategies, such as channelling declining incomes primarily into basic goods, utility fees, and paying debts (Nagy et al. 2015a). Although macro-processes largely shaped such decisions and local processes, substantial regional differences emerged in consumption patterns in the crisis period. In the pre- and the post-crisis period, the growth rate of consumption was much higher in the capital city and West Transdanubia, far exceeding the national average. In the prosperous years of the national economy, the Pest county and Central Transdanubia grew just as fast as the leading regions, but the quarterly data after 2014 suggests a widening gap between them and the two leading regions. The growth in the above regions was rooted in the increasing number of workplaces, growing wages in the private and the public sector, and in the high level of retail investments. Moreover, the average level of pensions in these regions was also higher than in the rest of Hungary that stabilised the demand.

The rate of growth in consumption was 2–3% lower in the East and South of Hungary than the national average, before and during the crisis. Moreover, while the rate of growth increased in the dynamic regions in 2015, it was slowing down in the lagging ones, generating a growing gap. Regional differences were also seen in the persisting structures of consumption in which food and utility expenses had much higher share in the East and South than in the well-off regions–while the families in the former areas spent significantly less on communication, travel, health, culture, and leisure. By adding the shrinkage of public services to these trends, we could see a much deeper gap between East-South and Northwest-Central regions of Hungary (Nagy et al. 2015b).

The post-crisis recovery seems to have deepened socio-spatial differences. In 2016, the growth of consumption in the capital city was four times higher than the national average (5%), followed by West-Transdanubia and Pest County (7–8%). Meanwhile, all other regions were still declining (by 2−5%). The growth of household incomes does not explain such a major difference in consumption as there was an increase in each NUTS2 region. The index of annual net income grew (at comparative prices) by 3–3% in 2013 and 2014 and by 4% in 2015 at macro-scale. However, spatial inequalities increased during the 2013–2015 period: in the eastern and southern regions of Hungary, the majority of counties (NUTS3 units) had no significant income growth, while in the dynamic regions' growth was above the national average. Such trends were fuelled not only by the uneven distribution of capital investments but also by hollowing out the public social care system and the resulting shrinkage in social transfers. The socio-spatial differentiation of incomes has a major explanatory power in understanding the polarisation of retail services: the areas affected mostly by the pre- and post-crisis restructuring are the poorest regions and highly dependent on state transfers, where marginality hits not only rural spaces but it also 'filters up' in the settlement hierarchy, hitting a number of small towns.

The above processes are reflected by income poverty data based on the Central Statistical Office 2005 Microcensus and the 2011 National Census. In the crisis-period, the share of the LAU1 regions hit by poverty[20] rose from 15% to 20% between 2005 and 2011, and further growth is being produced by recent austerity schemes of the government. Meanwhile, poverty grew as a spatially contagious phenomenon in East and South Hungary – and hit more LAU1 regions even in the West by 2011. The small-regions with the lowest share (<10%) of families hit by poverty concentrated in Central and Northwest Hungary in both periods; nevertheless, well off areas were shrinking and concentrated increasingly around Budapest and along the Budapest-Vienna and the Budapest-Balaton axes. These patterns mirror the uneven restructuring of the retail sector and the consumption spaces during crisis and in the following recovery period.

Conclusions

In the last two decades, retail restructuring produced an increasingly uneven landscape of consumption across CEE, contributing to socio-spatial polarisation in terms of access to goods and services to consumption practices and identities (Boros et al. 2007, Boros–Pál 2006, Eglitis 2011, Nagy 2014a, Patico–Caldwell 2002). Although the key agents – powerful retailers and the state – of such processes can be identified clearly at the national and local level, their relationships and embedding in various flows and networks shaping their strategies are highly complex. We sought to unfold this complexity in this paper:

(i) The spatial logic – the multiple territorial embedding–of retail capital was the driver of the centralisation processes in terms capital, organization, and consumption spaces in the pre-crisis neoliberal regulative context, enhancing urban-rural and metropolitan/non-metropolitan and intra-urban inequalities. The crisis made retailers focus on protecting their fixed assets and employing a highly selective location policy that deepened urban/rural gap, differentiated the urban network, and put metropolitan and intra-urban central spaces as prime targets for investments. The retailers' spatial strategies should be understood as the manifestations of the responses to the crisis of the financialised CEE markets (declining demand, indebtedness, flight of capital from peripheral markets) that differentiated consumers not only by income (Németh–Kiss 2007) but also by place of residence across Hungary. As a result, local and regional monopolies were produced/reinforced, and the population

[20] LAU1 regions where more than one-quarter of households lived in poverty.

of peripheral rural regions were marginalised, which made local households adopt new consumption practices, embrace informal activities, and accept new dependencies (e.g. the local state and personal networks controlled by powerful local agents) (Nagy 2014b).

(ii) Despite its limited scope, the state – primarily, the central government – adopted an interventionist policy in the crisis period. It rested on the stimulation of the domestic demand (reducing public utility costs and personal income taxes) that was socially selective due to the parallel steps towards shrinking and centralising social transfers and public services. As a result, deserving and undeserving consumer groups emerged, which led to 'double marginality' in peripheral spaces – produced by the spatial logic of retail capital and by state policies. Additionally, the introduction of tighter and increasingly complex regulation of retail – that did not deal with its socio-spatial consequences–stimulated market trends towards centralisation by (a) re-scaling regulative power from local to national level (on retail development, social transfers/local demand, and collective consumption), (b) rebalancing state-capital relations (enhanced administrative control over flows), (c) changing power relations between international and domestic capital, and (d) recasting state-capital-society nexus by shifting capital to finance state debt through taxation (VAT, corporate taxes) and administration. The limited transparency of re-regulation and the rising administration-related costs of operation hit mostly the small businesses in peripheral spaces–contributing to uneven development in Hungary.

The above processes were embedded into the systemic crisis of neoliberal capitalism (Harvey 2010) – the collapse of consumption growth rested largely on debts that hit CEE economies and their marginalised spaces heavily – and raised responses that enhanced the state control, caused a shift towards authoritarian schemes, and strengthened executive power, particularly in peripheral economies (Jessop 2010; Szivós–Tóth, 2013). However, the practices of policy making and the responses of local societies are shaped by national and local contexts that need further – in-depth – empirical research.

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