

# Sysco Food Service Distribution Company: An Analysis of Supply Chain Operational Competitive Advantage

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## ABSTRACT

This is a strategic analysis of Sysco, the largest food service distributor in the world. This study takes into consideration the impacts of external factors and challenges concerning the global hospitality industry and analyses Sysco's operations as it has evolved successfully through multiple changes in the field. The analysis is conclusive that Sysco's flexibility and innovation contribute to its competitive advantage and further growth for the company is anticipated. The analysis is useful to practitioners to study and possibly implement successful organisational and operational practices that the distributor has exhibited during the tenure of over 50 years. Further research and evaluation could be beneficial to discover possible additional operational changes after the COVID-19 pandemic.

**Keywords:** Sysco, Supply Chain Operations, Food Service Distribution, Competitive Analysis, Hospitality industry

## Introduction

Sysco Corporation, headquartered in Houston, Texas, is the largest food service distributor in the United States and the world (13 Top Food Distributors and Suppliers in the USA, 2022), and has been in existence since 1969. This article is a competitive performance analysis of this major player in the hospitality industry as a distributor of "food products, small wares, kitchen equipment, and tabletop items to restaurants, healthcare, and educational facilities" (Sysco, 2022b).

## Products and Services

Sysco provides a myriad of products and services to over 600,000 clients across the globe (Podell-Eberhardt et al., 2021). From the mom-and-pop pizzeria to major corporate health systems, Sysco supplies just about anything a service industry could need. Meat and poultry, seafood, dairy, produce, bakery and desserts, beverages, specialty and ethnic foods, pantry staples and supplies are just a fraction of the items that the company provides (Sysco Products, 2022). The hospitality industry benefits from the major footprint this company currently possesses. Their products are available in the most remote corners

of the world, as hospitality clientele needs become more challenging as competition evolves. Sysco keeps up with this demand through advances in marketing, supply chain distribution and technology (Sysco Company Profile, 2022). Even with significant challenges (MacKinnon, 2019) faced during uncertain economic times and pandemics, Sysco continues to outperform its competition, however, that battle is fierce.

## Mission and Purpose

As a company tries to become more competitive in the market, it may want to entertain developing (Grünig et al., 2022) a mission statement that encapsulates its honest approach concerning the reasons for the goods and services it provides. A mission statement is a succinct snapshot of a corporation that provides an idea of what the company stands for as well as what it provides (Bebegal-Mirabent et al., 2021). This type of dialogue has provided a positive impact on performance for those that incorporate transparent and progressive approaches to mission and vision policies (Dermol, 2012; Hitt & Ireland, 1992). Sysco developed a mission statement that effectively describes its approach to providing goods and services. "Delivering success for our customers through

industry-leading people, products, and solutions” (Sysco Company Profile, 2022) is a succinct and effective statement from this global leader in the hospitality supply industry. Sysco also provides a purpose of “connecting the world to share food and care for one another” (Sysco Purpose, 2022) which effectively describes exactly what they do.

The company continues to evolve and expand as a top performer in a global context. Its mission and purpose are being fulfilled as the institution continues healthy growth as a multinational juggernaut.

## History and Positioning

Sysco is a company that spans the planet and was founded in 1969 (Sysco Company Profile, 2022). From its humble beginnings, it has grown to become the largest and most innovative food service provider in the hospitality industry in the United States (13 Top Food Distributors and Suppliers in the USA, 2022) and globally.

## Global Positioning

The Sysco Corporation is the furthest reaching food service entity in the world. With revenues in 2021 reaching 38 billion dollars, its fiscal prowess is evident. The organisation is currently represented across 330 distribution centres and services its 600,000-plus customers in over 90 countries (Sysco, 2022b; Sysco, 2022a). Sysco’s competition in the United States comprises US Foods, McClane, Performance, Gordon and Reinhardt food service companies. Globally, Sysco’s largest competitors are Cargill and PepsiCo (Filippaios & Rama, 2008). However, Sysco, through its operational innovations (O’Leary, 2011) is by far the largest distributor in the world.

## Timeline

The Sysco Corporation began in 1969 in Houston, TX. as a small local company, Hoskings (Sysco Company History Timeline, 2022). During the 1970s the company merged with a few regional food service industries including some frozen foods and food service distributors and became Major-Hoskings. During the 1980s, Sysco as the company was known, realised exponential growth as numerous mergers and acquisitions took place and the name of the company changed to Sysco. By the 1990s, Sysco Corporation was the third largest company in Houston with over 30,000 employees (Sysco Company

History Timeline, 2022). In the 2000s, Sysco Corporation began expanding its ethnic and regionally inspired offerings and advanced its global footprint. By the 2010s and onward to today, Sysco is now the world’s largest food distribution company in the hospitality industry with over 600,000 clients in over 90 countries. Sysco continues to expand.

## Comparison

While Sysco’s growth and success have been monumental, there are other players in the industry with similar histories and successes. Sysco’s largest competitor in the United States is US Foods. US Foods began 20 years after Sysco’s foundation; however, they are expanding much in the same manner as Sysco (Akkerman et al., 2010), however, they are 20 years behind. US Foods has not expanded into the global market, but that does not mean they may aspire to eventually expand with a planetary footprint objective. US Foods continues to chip away at Sysco’s market share on the North American continent, however slowly.

Additional companies that are in consideration include Ben E. Keith, McClane and many others. Each company began in the 20<sup>th</sup> century and has expanded. However, their growth rates are not nearly as great as Sysco’s, and some do prefer to be regional distributors. With that said, food distribution is continually expanding and finding more efficient and effective ways to deliver products to consumers (Bumblauskas et al., 2020). There are major players in the game with similar histories and market goals, however, none have the global reach of Sysco, yet.

## Organisation, Structure, and Differentiation

An efficient and effective organisational structure is necessary for businesses to not only survive but to achieve competitive advantage. “A carefully designed organisational structure is a logical prerequisite for success in the 21<sup>st</sup> century business climate” (Tiller, 2012, p. 20). Stakeholders of corporations, across all disciplines, expect efficiency and effectiveness by utilising well-defined processes when selecting and implementing organisational structures and leadership (Schneider, 2002). When companies apply these concepts, they are more apt to achieve a propensity for success as efficient operating models promulgate effective outputs (Csaszar, 2013). Sysco’s organisation, even as large as the company has grown, is effective and efficient and is flexible to change as environments evolve.

Differentiation is also of primary significance in today's competitive corporate environments (Boehe & Barin Cruz, 2010) we used structural equations modelling to test our hypotheses. The results suggest that CSR product differentiation predicts export performance better than product quality differentiation and almost as well as product innovation differentiation. Multi-group analysis further revealed that the positive and significant effect of CSR product differentiation on export performance is likely to be contingent on the number and type (developing vs. developed. "Differentiation in business refers to the principle of setting your company apart from the competition through a specific element, such as your distribution network or price-point. It provides a superior level of value to your customers and helps your company to distinguish itself in the marketplace. As such, the main aim of any differentiation strategy is to increase your business's competitive advantage" (GoCardless, 2020, p. 1). This is no different in the hospitality industry and its peripheral industries (Stefanovic & Milosevic, 2012). As the world's largest food service distributor, Sysco provides customers with the fastest and most efficient delivery of hospitality products through differentiation of utilising the latest technology and big data-driven analytics.

## Organisational Structure

Achieving operational excellence is a primary goal of every entrepreneurial venture. Effective organisational structure is an important facet of this implored achievement. Sysco deploys a traditional large corporation type of organisational structure, that is headed by the chief executive officer and president, Kevin Hourican. Moving down the ladder, the structure uses multiple lines of accountability with divisions designated by geographic and functional departments. As a global entity, administrative and executive representation is found in multiple countries. The CEO and the rest of the executive team, which number seventeen members, are held accountable by a board of advisors, numbering ten members (TheOrg, 2021).

The company currently serves customers in 90 different countries from numerous facilities. The company utilises lean methodologies, based on some Six Sigma theoretical statements. "The Six Sigma approach to quality improvement has had a profound impact on the mode of operation and the profitability of the companies that have embraced it. Six Sigma is a disciplined and highly quantitative approach to improving product and process quality. The original goal, implied in the Six Sigma definition, is the reduction of defects" (Hahn et al., 2000,

p. 317). These methodologies are deployed not only in the processes of service delivery but also in the structure of the company. Efficiency, or doing more with less, is something that Sysco deploys, and it is well-rooted in Six Sigma techniques.

## Mergers and Acquisitions

Mergers and acquisitions are ways that companies may grow rapidly. "They are important modes through which firms carry out their domestic and international strategies and have been noted as the CEO's favorite strategy" (Ferreira et al., 2014, p. 2550). The 1980s and 1990s saw a plethora of mergers and acquisitions across multiple fields of endeavour. "Although the decade of the 1980s, produced 55,000 merger and acquisition transactions at a total value of \$1.3 trillion, known as "merger mania." the 1990s produced more than twice that number, at a value of approximately \$11 trillion" (Hitt et al., 2005, p. 377). The giant food distributor was part of this wave of exponential growth through these business practices.

Sysco's operating and organisational models were driven by the addition of rival companies to their catalog of services. Over three decades, Sysco brokered numerous acquisitions (Sysco Company History Timeline, 2022) and facilitated a few mergers to become the service behemoth it is today. Sysco also deploys a working model of owning and using subsidiaries that can address regional and ethnic consumer needs. They also utilise specialty seafood and meat suppliers in their subsidiary model.

## Segmentation

Sysco Corporation is the world-leading food service distributor by their financial record, by the number of customers serviced and by the number of operational unit locations. However, they are not necessarily considered a hospitality industry per se. Their primary segment is in supply chain and delivery logistics, which is the segment of the industry that deals with getting products from point A to point B as efficiently as possible (Stank et al., 2005). However, the products they supply are all necessities within the food service and hospitality industries. With that said, they are supporting a myriad of hospitality entities and customers range from all areas of the globe and in many service-based enterprises.

## Unique Characteristics

Sysco provides products to regions that require specific dietary needs. Because of this, Sysco has taken on the

stance of being a global provider while acting locally (Kefalas, 1998). They can and do offer local produce, traditional ethnic foods and special dietary requirement items based on geographic locations. Usually, regional and local food distribution companies are more in tune with specific area needs. However, Sysco has made this a priority for their operating model and can provide those requirements to the regions they may naturally reside. Customers halfway across the globe can also have access to those products, no matter where they are. How do they do all this effectively? Through supply chain data analytics, operational management science and the latest technology, Sysco uses the methods to provide numerous products at the most effective and efficient levels. These are a few differentiation approaches that Sysco uses to vault itself to the echelon of distribution systems. Other suppliers are using many of the same operating models that Sysco has developed and honed over the years. However, Sysco remains at the top of the ladder as the industry leader.

### Service Development

This successful, global distribution company has been a major player in the development of delivery services. Also, it is important to note that they are early adopters of new technologies and also through research and development have created applications that assist with service-based delivery. From analytics, inventory management and customer relationship management, to human resources and operations management, they certainly represent as inventors and leaders in developmental fields of endeavour. Service development is based on facilitating resolutions for needs that arise. Listening to customers is a great way to begin to augment, change and evolve the services you provide (Matthing et al., 2004). Sysco has been listening to their clientele as they have developed systems to provide just about any food service industry product that anyone couple possibly need. This is achieved through their stringent efforts to give the best, most efficient service anywhere in the world.

Their service development aligns with their purpose to “connect the world to share food and care for one another” (Sysco, 2022a, p. 1). As they act locally, Sysco is connecting a myriad of people through the foods they provide. One may be able to provide a truly Cajun-influenced meal in Sydney or British fish and chips in South America. Because of Sysco’s continued evolution and innovation, they can provide these specialties and connect cultures in ways that were not thinkable merely 50 years ago. This is the niche they fill better than anyone else in the history of the hospitality industry.

### Competitive Strategies

Deploying effective strategies to gain competitive advantage is a necessary approach to the sustainability and success of entrepreneurial ventures (Slater & Narver, 1996). This is no different for organisations in the global hospitality industry, and those that support them (Baumann et al., 2021; Chen et al., 2016; Maria et al., 2008). While a myriad of approaches is used to gain an advantage, one may look back at Michael Porter’s seminal work concerning the four basic types of competitive strategies (Porter, 1990) to further clarify what methodology a company deploys. Porter explains that the four basic competitive advantage strategies fall under either cost leadership, differentiation, cost focus or differentiation focus (Sharp, 1991) the confusion present in marketing and strategic management texts as to the definitions of the three strategies of low cost, differentiation and focus is noted. The idea that using price to differentiate means a firm is using a low cost strategy is dismissed and the value of a definition of focus strategy as merely some degree of extreme differentiation is questioned. New definitions of the three strategies are proposed which are based upon the idea that firms react to, and take actions which influence, the structure of the market in which they operate. They influence market structure through determining the market’s proximity level the minimum level of marketplace performance which a firm must reach in order to compete across the broad marketplace. If a firm has the ability to reach this level and go further to excel in the provision of one or more benefits, it can implement a differentiation strategy. Alternatively, it can attempt to lift the market’s proximity level or partake in imitative activity, which reduces the potential bases for differentiation in the market, a low cost strategy (only sensible for the firm with the lowest costs of production. Each of these, while different, has a certain impact on how well a company may gain a competitive advantage. While the hospitality industry is still trying to recover from pre-pandemic levels of success, Sysco continues to provide service to these entities while growing exponentially. They deploy strategies that encompass cost leadership and differentiation focus in economies of scale (Eckert et al., 2022), very effectively.

### Differentiation and Diversification

Diversification allows companies to “spread their wings” by offering different products and services that may have been different than their primary established offerings. One may think of a company such as Amazon, which

diversified from merely an online book and music retailer to a multinational provider of not only retail tangible products but numerous services (Onyusheva & Seenafasatopom, 2018). They use a diversification model to vault into the echelons of online business success. “The long-run effect of within-industry diversification is significantly positive in terms of profitability” (Park & Jang, 2013, p. 51).

Sysco Corporation has diversified from merely supplying food items to the hospitality industry. Their products now range to just about anything and everything one of these institutions could need. From paper products to services, business analytics to their niche market food items (Sysco Products, 2022), Sysco has diversified its corporation since its humble beginnings in Houston, TX. The ability to be a “one-stop-shop” for a hotel, restaurant, casino or cruise ship is an attractive offering for many businesses. They take some of the guesswork out of where your supply may come from. If one can procure from one source, at a great price, there is no need to look elsewhere. This is one reason why Sysco has become as successful as it continues to diversify its products and services.

Differentiation is offering something unique that is possibly not provided by anyone else. It can also mean using different or more advanced support services to provide operational effectiveness and efficiency. Sysco uses the latest technology and business analytics that others may not have access to or have the fiscal ability to acquire. Their support system differentiation gives them an advantage over their strongest competition, and they continue to develop better, more innovative ways to provide their products and services more effectively as challenges (Solak et al., 2014) we introduce the stop-and-drop problem (SDRP are addressed to supply and feed the masses.

### **Economies of Scale, Cost Leadership and Corporate Strategy**

Through mergers, acquisitions and strategic alliances, Sysco corporation has scaled its operations successfully. As the largest food distributor in the world continues to grow, the economies of scale this company may achieve are interesting to ponder. Scaling operations effectively has a definite impact on one’s competitive abilities and those that can successfully deploy such tactics enjoy wonderful achievement (Christensen, 2001).

The hospitality industry is growing in tandem with the increase in consumer disposable income (Beramendi &

Cusack, 2009). To keep up with demand, global supply corporations such as Sysco can provide products to places that were once thought inaccessible. Because of their size and reach, they are achieving what no other food distribution company can. However, being large is not always the best. One must still have a customer-first and employee-first (Ogbeide & Harrington, 2011; Wijekoon et al., 2021) approach, and Sysco seems to achieve this as their customer satisfaction and job satisfaction scores are constantly positive (Sysco, 2022a). Sysco also deploys the philosophy of thinking globally and acting locally, even as the company continues to expand.

Cost leadership (Datta, 2010) is also a strategic approach for an advantage that Sysco deploys. With its vast resources, advanced supply chain technologies and strategic alliances, the organisation provides its goods and services at very attractive prices. One might find it difficult to acquire the same items from other suppliers at a lower cost. Competition is fierce in this market, but Sysco can continue making profits through its efficient networks while providing a cost-effective solution for its customers.

### **External Market Forces**

The global hospitality industry certainly cannot escape the influence of external market forces as it continues to recover from the recent COVID-19 pandemic. Labour markets for the hospitality industry have taken a massive hit as many people walked away from employment during the great resignation in the wake of the pandemic (Liu-Lastres et al., 2022). The market has not recovered and many businesses are struggling to keep their doors open and provide goods and services at levels that customer’s desire. How long the labour shortage will last is hard to tell. However, it is known that the labour supply is cyclical (Choi et al., 2000) and hope is on the horizon.

The supply chain is another external market facet of the hospitality industry that is impacted by multiple forces. The supply chain is the lifeblood of any manufacturing company or service provider. Without raw materials and products, businesses come to a screeching halt and customers are not effectively and/or efficiently serviced. The COVID pandemic certainly had an impact on supply and value chains as shortages of products and transportation were evident as hospitality organisations (Santacreu & LaBelle, 2022) struggled to supply even the most basic of necessities for their customers. The environmental world also has given rise to challenges in the supply chain. From drought, floods, hurricanes

and earthquakes to unnatural disasters, the environment (Reddy et al., 2016) can speed up, slow down, or completely shut down the supply. Hospitality industries are at the whim of Mother Nature and its impact on supply chains. The impact of governmental policies also has an impact on the supply chain. This is quite evident with current energy policies (Hoang et al., 2021) moving to greener, however unsustainable and concentrations. Fuels are more expensive, hence transporting all goods and services increases in price. These costs are passed on to customers and also impact how much time it takes to move items between two places. It is a snowballing quandary as the hospitality industry has many hungry, thirsty and demanding customers who expect quality and expediency. However, it is becoming more difficult to fulfil requirements.

Because of the external factor of higher cost for products and services that are being supplied to the hospitality industry, these costs are passed onto the consumers that frequent these establishments. What does this mean for those businesses? It doesn't necessarily increase their profit margins, and the opposite is quite often the case. Because of hotels, restaurants and other service industries charging higher prices, the adoring public may begin to become more selective with how they spend their disposable income. What is causing the expedited inflation? Many researchers believe it all comes down to unsustainable recently deployed energy policies that are not feasible with current technologies (Adua et al., 2021). As inflation spirals out of control, it is one of the most significant external market influencers in recent memory. Governments have attempted to assist hospitality industries that have been impacted by COVID, however, with the new "pandemic" of global inflation, recovery with assistance from governments is questionable (Sanabria-Díaz et al., 2021).

## External Influencers Impacting Sysco

The global hospitality distribution company is not immune from the effects of external market influences. From supply chain disruption to the availability of products, Sysco has also realised numerous challenges with keeping up with global demand. Sysco has made changes to its offerings and its logistics of transportation and delivery based on the negative impacts of external market factors. The primary driver of these changes is because of supply chain disruption from COVID and inflation impacting delivery logistics and costs of products and services (Santacreu & LaBelle, 2022). The cost of energy is outside of the control of Sysco Corporation, however, they can

and do make changes to combat the negative effects of these external factors. Over time, Sysco has realised some recovery through its innovation and strategic management practices.

## Facing External Forces and Sustainability through Innovation

Sustainability, whether it is economic, social, or ecological, is possible through innovative practices (Modica et al., 2020) that help with a competitive advantage. Sysco prides itself on being a global leader of innovation in supply chain and delivery logistics that supply goods and services to multiple hospitality industries in over ninety countries. Strategic management (Konovalova et al., 2018), or the art of having long-term objectives and carrying them out to fruition, is primary for operational sustainability. Sysco continues to evolve as it stays true to objectives that are in line with corporate mission and purpose and hence is well-versed in effective strategy. To coincide with having long-term goals and keeping them at the forefront, Sysco is also flexible to change. Effective change management (Lee, 2008) and the ability to adapt as external factors push the boundaries of challenges are necessary for global success. The global industry leader has proven time and again that they are willing to "roll with the changes" and adapt to the ever-changing environment of exchange. Also, Sysco provides alternative supplies and products to combat the negative impacts of external factors.

Much of Sysco's success has been reliant on big data and the usage of data analytics. These are effective tools, especially for forecasting, which is now becoming more of a necessity as data from COVID is relatively new. By looking at historical data from times of disruption, Sysco can anticipate possible solutions to problems that arise before they come to actual fruition. Sysco has been extremely successful over time as it is currently the global leader in supplying the hospitality industry and they have and still do adapt to changes that are brought on by external market pressures effectively.

## Challenges and Opportunities

As stated previously, external forces in the hospitality industry have made significant impacts on how institutions operate. Challenges are quite evident from disruption in the supply chain to labour shortages and inflation (Horn, 2021; Ksinan Jiskrova, 2022; Liu-Lastres et al., 2022; Moosavi et al., 2022; Van Niekerk, 2021). However, these

challenges, while quite ominous, provide the industry with opportunities to improve practices and overcome the obstacles and barriers that might be diminishing their returns. Sysco is definitely in the arena combating these challenges through engagement with opportunities for success with rigor.

## Sysco's Challenges

Sysco is not immune to the challenges that are facing the hospitality industry. Inflation is a major player that Sysco must face as prices are rising and products and services become more costly. Also, because of rising prices, the company's customers are impacted and may have diminished business clientele frequenting their establishments. Because of this, Sysco could lose some business as organisations may have to cut back on production and services or close altogether. Supply chain disruption is probably the most impactful challenge that Sysco faces today. As a global leader in supply logistics, they have to make changes in how they deliver their goods and services to their global customers. Finally, labour supply is also of issue. With the lack of available workers, Sysco could be challenged to provide enough manpower to successfully fulfil customers' demands. With all these challenges presented, it does provide opportunities for growth and innovation.

## Sysco's Opportunities

Big data and analytics, something Sysco currently uses to a great extent, can drive solutions to many problems that businesses face in an operational context. Through the use of statistical analysis and data mining, Sysco can strengthen its supply chain (Jha et al., 2020) by searching for and implementing short-term and long-term solutions to disruption. Improvement in operations management is also driven by the quantitative information derived from the overabundance of data available. It has been shown that effective and more efficient operations management (Mišić & Perakis, 2020) is successful for the business and Sysco can certainly use this data to assist in its quest for operational excellence. Also, additional labour can be found and retained by using analysed historical data. Specifically, finding why employees stay and leave is critical for businesses to address. Data will certainly help in this endeavour. If you keep your effective employees, you are more inclined to achieve operational success and a healthy bottom line.

Sustainability is another area of opportunity that Sysco currently pursues and should continue. Diminishment of

waste in the food industry (Dhir et al., 2020; Eriksson et al., 2019) is an approach that could be beneficial to the company's public perceptions and financial performance. Combating inflation through smart purchasing (Vörösmarty & Dobos, 2020) is another opportunity for potential success. Making the right decisions at the right time with the procurement of the products one decides to purchase can certainly be an opportunity for financial savings. Ecological or environmental sustainability is on everyone's radar, and this includes Sysco. Utilising green methodologies for operations (Fernández-Robin et al., 2019; Sisson et al., 2021) that cut back on energy consumption, and societal impact, while improving financial gain is an approach that should assist with public perception of Sysco's approach to sustainability of the triple bottom line (Slaper, 2011). Finally, as Sysco continues to evolve its supply chain, especially during these challenging times, it is evident they are achieving some operational goals as many customers are still being serviced at an exponential rate. However, finding alternative products when there are shortages is an approach to an opportunity to expand offerings (Ghadge et al., 2021). Before challenges are presented, it could be that certain substitute products may have never been considered. However, with the introduction of these products for customer availability, Sysco could garner additional long-term returns with additional purchases and/or customers.

## Conclusion and Further Research

Sysco is a shining example of success in the hospitality industry. From its humble beginnings in Houston as a small foodservice distributor, Sysco has now become a major player in global supply chain logistics. Despite facing various challenges, especially during these difficult times, Sysco has managed to consistently evolve, overcome obstacles and achieve operational success. Their sustainable practices have contributed greatly to the growth of the hospitality industry, and the future looks bright for Sysco. As the world continues to recover from the COVID-19 pandemic, further research and analysis could be beneficial, especially when comparing Sysco's performance to other global leaders in the field.

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