

EXECUTIVE SUMMARY

PREFACE

Kenya is experiencing an increase in the proliferation of modern food retail outlets, the consumption of unhealthy processed foods, the prevalence of obesity and overweight, and ongoing micronutrient deficiencies in the country. As a result, Kenya's food industry stands at a pivotal crossroads. Embracing nutrition is no longer an option but essential.

This first-ever independent assessment of Kenya's food and beverage (F&B) manufacturing sector analyzes the healthiness of products offered by 30 of the largest producers of packaged F&B. Together, these companies represent approximately 57% of the formal packaged F&B market in Kenya. Amongst the 746 F&B products analyzed, only 33% meet defined 'healthy' thresholds—while the remaining 67% do not.

This report provides important data and analysis to support a range of stakeholders: policymakers to shape markets and design policies that improve food environments; responsible investors to allocate capital wisely within the food sector; the food industry to reformulate products to improve health outcomes; and civil society and consumers to ensure their voice is leveraged for the improvement of products they consume.

CONTEXT

Kenya is undergoing a rapid nutrition transition. While fresh and minimally processed staple foods remain central to Kenyan diets, the consumption of (ultra-) processed packaged foods—including products high in fats, salt, and sugar—such as sugary beverages, is rapidly increasing. For example, the sales of (ultra-) processed, packaged foods grew by 16% between 2017-2023.¹ This shift is driven by urbanisation, a growing middle class, and expanding formal and informal retail markets.

These dietary changes are contributing to rising rates of overweight, obesity, and diet-related non-communicable diseases (NCDs). Adult obesity has tripled since 2000, and NCDs now account for 39% of all deaths in Kenya, over 50% of hospital admissions, and 11% of health expenditure. In 2022, 45% of women of reproductive age and 19% of men were overweight or obese. At the same time, undernutrition and micronutrient deficiencies persist—especially amongst low-income populations—with 79% of Kenyans unable to afford a healthy diet.

Improving food and nutrition security in Kenya requires coordinated, multisectoral efforts that promote access to affordable, safe, and nutritious foods while mitigating the negative impacts of a rapidly changing food system.

The Government of Kenya has implemented several regulatory and policy measures. The fortification of staple foods—including edible oils, wheat and maize flour, and salt—is mandatory. Furthermore, in a recent public statement, the government has committed itself to prioritising healthy diets, including implementing mandatory front-of-pack (FOP) nutrition warning labels based on the recently released Kenya Nutrient Profiling Model (KNPM).

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- a. Ultra-processed foods from the Food Systems Dashboard are defined as foods made of mostly industrial ingredients and additives with minimal amounts of unprocessed foods, mainly used to increase palatability and shelf-life.

The F&B industry plays a critical role in shaping food environments, with large multinationals and micro-, small- and medium-sized enterprises driving the availability and marketing of both nutritious and unhealthy products. Monitoring the nutritional quality of products on the market and strengthening accountability and regulatory oversight of the industry is essential to ensure progress towards national nutrition goals.

PURPOSE AND SCOPE

To support national policymaking processes, ATNi (Access to Nutrition initiative) conducted **the first independent assessment of the healthiness of products offered by 30 of the largest producers of packaged foods and beverages operating in Kenya. Together, these companies represent an estimated 57% of the formal packaged F&B market in the country.**

30

COMPANIES INCLUDED
IN THE KENYA PRODUCT
PROFILE

which accounted for

57%

of the total sales of packaged foods in Kenya in 2022



This assessment provides insight into the relative 'healthiness' of products sold on the Kenyan market, having analyzed 746 packaged F&B products. Four nutrient profiling models (NPMs) were used: the Health Star Rating (HSR); the modified HSR+ micronutrients (mHSR+) to include inherent or added micronutrients; the World Health Organization Africa Regional Office's (WHO AFRO) model to determine whether products are eligible to be marketed to children; and the recently adopted KNPM.

In addition, the [Kenya Corporate Profile methodology](#) evaluated the nutrition-related policies and practices for 12 of the largest companies in terms of estimated sales (Bidco, Brookside, Capwell, Coca-Cola, Excel Chemicals, Flora, Highlands, Kapa Oil, Kevian, Mini Bakeries, Nestlé, New KCC) to better understand the

food industry's potential impact on food environments and healthy food choices.

The [ATNi Global Index 2024 methodology](#) served as the foundation for developing the framework for the Kenya Corporate Profile assessment. The framework was substantially revised to reflect the Kenyan nutrition context, and to ensure applicability for the selected companies. The revision process was informed by one-on-one consultations with relevant stakeholders and experts; insights from the Kenya Food Environment Mapping Report (2025) that included a comprehensive overview of existing government regulations and policies relevant for the food environment; additional literature reviews; and the latest guidance from authoritative public health bodies. Lessons from previous ATNi Index iterations were incorporated where relevant.

The assessment methodology comprises 22 indicators, evaluating companies across three themes and eight categories: 1. Product healthiness (product profile, portfolio improvement, reporting on healthiness, and micronutrients and fortification); 2. Influencing consumers (labelling, marketing and affordability); and 3. Corporate governance (nutrition governance and workforce nutrition).

The purpose of these assessments is to provide independent data to inform the food policy debates in Kenya, help companies understand how they compare to their peers, and guide investors on the performance of the companies they own or support in relation to nutrition and health. The report also provides tailored recommendations to government, industry and investors.

KEY FINDINGS

The level of engagement varied across the evaluated companies, which included both Kenya-headquartered and global-headquartered manufacturers. Four companies—three global (Coca-Cola, Flora Food Group, and Nestle), and one Kenya-headquartered (Kapa Oil)—engaged in the data collection process for the assessment of the company's nutrition-related policies and practices (Corporate Profile assessment).

ATNi's research found that while nutrition and health are increasingly appearing on the agenda of the 12

largest F&B companies in Kenya, the companies still have considerable progress to make to show how they contribute to food and nutrition security in Kenya. Global-headquartered companies may have stronger global policies and commitments, but they could improve transparency regarding how their global practices are implemented in Kenya. Meanwhile, for Kenya-headquartered companies, no published information on nutrition strategies and activities they may have in place was found. Kenya-Headquartered companies are therefore encouraged to improve both their transparency and reporting in this area.

Product Healthiness

Product Profile: The overall healthiness of the 30 Kenyan companies' portfolios is low, with substantial variation between companies. **Results from the HSR calculation showed that just 33% of products met the 'healthy' cut-off of 3.5 out of 5.0 stars,¹** which increased to 38% when results were weighted by company sales—a considerable shift.

When micronutrient data were included using the **mHSR+ model**, these figures rose to 36% and 42% with sales weighting. Lower results under the **WHO AFRO model** (14%; 23% sales-weighted) and **KNPM** (10%; 15% sales-weighted) reflect the more stringent criteria applied by WHO for eligibility to market F&B products to children, and by the KNPM.

When comparing the mean HSR of the 11 largest global-headquartered companies included in the Kenya Product Profile (1.4 stars out of 5, n=223) with their overall mean in the ATNi Global Index 2024 (1.7, n=21.617), it is evident that eight out of these 11 companies have a lower average HSR score in Kenya than their global average.

Portfolio Improvement: Macronutrients and Food Components: Only two globally head-quartered companies—Flora FG and Nestlé—were found to have published global targets to address nutrients of concern. Kenya-headquartered companies had not published reformulation strategies or targets, although Kapa Oil shared evidence of product testing for nutrient content in 2020.

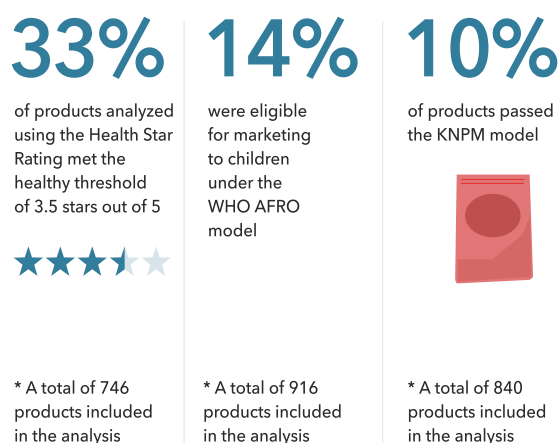
Portfolio Improvement: Micronutrients and Fortification

Seven of the 12 largest companies assessed were found to be fortifying their products. Bidco and Kapa Oil were found to fortify edible oil with vitamins A and D, and Capwell was found to fortify maize and wheat flour, in line with Kenyan regulations. Only Flora FG was found to have a public global commitment to only fortify 'healthy' products based on their own criteria and to fortify in line with Codex Alimentarius and WHO/Food and Agriculture Organization of the United Nations (FAO) guidelines.

Product profile: ATNi's assessment found that 140 products (19% of the total 746 products considered) across 24 companies were fortified, including 120 (11%) that were voluntarily fortified. Only 32% of fortified products assessed by HSR were found to meet the 'healthier' threshold.

Reporting on Healthiness: Only Flora FG and Nestlé were found to have published information on using a NPM to assess product healthiness, though not specifically for Kenya. Kenya-headquartered companies had not published information on whether they used an NPM or planned to adopt the KNPM once available for this purpose.

COMPARISON OF THE HEALTHINESS OF PRODUCTS IN KENYA ACROSS DIFFERENT MODELS



Influencing Consumers

Responsible Labelling: BOP labelling is regulated in Kenya and is therefore not evaluated in this assessment, which aims to evaluate companies' labelling commitments beyond regulatory compliance. No company was found to explicitly commit to FOP labelling or placing health and nutrition claims only on products meeting specific nutrition criteria (e.g. passing an NPM), meaning that companies may be using health and nutrition claims on products of low nutritional quality in Kenya. However, the Kenyan Ministry of Health (MoH) has recently released a government-endorsed NPM, the KNPM, which provides criteria for a FOP warning label and is designed to inform other food policies.

Product profile: ATNi's product profile assessment found that 90% of products analyzed with the KNPM did not pass the model and would require an FOP warning label as proposed in the KNPM.

Responsible Marketing: Three globally-headquartered companies—Coca-Cola, Flora FG, and Nestlé—were found to have published global commitments for responsible marketing to children. However, none reported on the implementation of these policies in Kenya. Kenya-headquartered companies included in the assessment had not published commitments to restrict marketing of all—or 'less healthy'—products to children.

Product profile: ATNi's Product Profile report assessed the eligibility of 30 companies' products to be marketed to children applying the WHO AFRO model and found that just 14% of products were eligible.

Affordable Nutrition: Three Kenya-headquartered companies—Bidco, New KCC, and Capwell—were found to market their products as affordable and healthy or nutritious on their websites but had not published a nutrition strategy outlining specific criteria for defining affordability or healthiness. Kapa Oil shared evidence of tracking product prices relative to competitors in Kenyan supermarkets. Flora FG measured affordability by tracking household penetration of its products amongst lower socio-economic groups in Kenya.

Corporate Governance

Nutrition Governance: Three Kenya-headquartered companies—Brookside, Capwell, and Kevian—referenced their role in providing access to nutritious or healthy foods on their websites. Other companies, such as Bidco, were found to market some of their products as healthy. Three global-headquartered companies—Coca-Cola, Flora FG, and Nestlé—publish global nutrition strategies, though none reported comprehensively on the implementation of all aspects of their strategy in the Kenyan market.

Workforce Nutrition: Five of the 12 companies assessed—Coca-Cola, Flora FG, Kapa Oil, Kevian and Nestlé—shared information on the practices they have in place for at least one of the workforce nutrition pillars: healthy food at work, nutrition-focused health checks, nutrition education, and breastfeeding support (including parental leave). Certain elements of these pillars are regulated in Kenya, including parental leave and the right for employees to be properly fed.

CONCLUSION

This assessment highlights the limited but emerging efforts of F&B companies in Kenya to improve the nutritional quality of their products and influence healthier consumer choices. While some global headquartered companies show progress in setting nutrition-related targets and commitments at corporate level, information on their implementation in the Kenyan market is largely undocumented. Kenya-headquartered companies, meanwhile, had not yet published information on the nutrition strategies and activities they may have in place.

The overall healthiness of packaged food products was found to be low, with most products failing to meet established NPM thresholds. Although some companies have taken steps to fortify products or promote affordability, these efforts were not consistently linked to clear nutrition criteria or supported by robust monitoring systems. Reformulation strategies, where present, were rarely backed by public targets or evidence of local application.

Information on consumer-facing practices—such as responsible labelling and marketing—was also found to be limited. No company was found to apply NPMs to guide their health claims. Responsible marketing of F&B products to children remains relatively unregulated in Kenya, and little attention is paid by industry to this topic.

Overall, few companies align with international standards or reporting on the implementation of their responsible marketing commitments in Kenya.

In terms of governance, only a handful of companies were found to have published nutrition strategies, but none demonstrated comprehensive implementation in Kenya. Reporting on workforce nutrition policies was minimal, with little evidence of practices exceeding legal requirements or addressing broader employee health needs in the workplace in Kenya.

To create a healthier food environment in Kenya, stronger regulatory enforcement, greater corporate transparency, and more ambitious industry action are needed. This assessment provides a foundation for policymakers, companies, investors and civil society to collaborate in ensuring that nutritious, affordable, and safe food becomes the standard—not the exception—for all Kenyans.

RECOMMENDATIONS

Manufacturers

1 Assess Product Healthiness, Marketing to Children, and Affordability in Line with National Commitments

F&B companies operating in Kenya should assess their product portfolios using the KNPM and align their practices with national nutrition goals. This includes:

- Identifying which products qualify as 'healthier' under the KNPM and, for global companies, ensuring these products are equally available in the Kenyan market.
- Avoiding the marketing of 'less healthy' products to children by applying the **WHO AFRO NPM** standards.
- Measuring the affordability and accessibility of healthier options, particularly for **low-income and vulnerable populations**.

2 Set Clear Targets for Healthier, Affordable Products and Responsible Marketing

Companies should adopt and publicly disclose measurable targets to:

- Increase the availability and sales of healthier, affordable, and fortified products, especially those aligned with national fortification mandates.
- Assign executive-level accountability for nutrition, such as CEO oversight or regular board reviews.
- Fully align marketing practices with WHO and UNICEF standards, defining children as under 18 and restricting marketing of unhealthy products across all media platforms.

3 Improve Transparency on Nutrition Policies, Progress, and Quality Controls

To build trust and accountability, companies should:

- Publicly report on nutrition-related policies, including progress on reformulation, sales of healthier products, and responsible marketing and labelling.
- Disclose fortification practices and ensure that fortified products meet health standards through **robust quality control systems**.
- Include standardized micronutrient content on **back-of-pack labels**, in line with Kenya's regulatory requirements.

Government and Policymakers

The Government of Kenya has demonstrated strong leadership on nutrition through revising the **Kenya National Action Plan (KNAP) 2023-2027** and developing the KNPM. To accelerate progress:

- **Mandate the use of the KNPM** and the recommended FOP nutrition warning labelling to drive healthier offerings by food companies and help consumers make informed choices.
- **Enact and enforce regulations** to protect children from exposure to unhealthy food and beverage marketing, in line with WHO and UNICEF recommendations.
- Consider other **fiscal policy measures** that make healthy and sustainable products the easiest and affordable options, thereby supporting a healthy food environment, including taxing unhealthy food or reducing taxes on healthy foods, and implementing public procurement criteria.
- **Integrate workplace nutrition interventions** into national health strategies to support employee well-being and productivity.
- Consider adopting **ESG guidance which includes nutrition metrics** for public food companies listed on the Nairobi Stock Exchange.

Investors

- Investors should **prioritize investment in companies that demonstrate transparency** in their nutrition-related policies; responsible marketing practices; and workforce nutrition initiatives. They should support investees that align with national and international nutrition standards (such as Codex Alimentarius and WHO/FAO guidelines) and back businesses that offer healthier product portfolios and actively contribute to Kenya's public health goals.
- Investors can leverage tools, such as [ATNi's Investor Expectations on Nutrition, Diets, and Health](#), to evaluate company actions on nutrition and guide them towards progress on nutrition and health.
- Investors should help drive progress by demanding that multi-national companies operating in the region apply **the same or better nutrition and health standards** in emerging and frontier markets as they do in more mature markets.
- Investors should leverage their influence by **integrating nutrition into their own reporting standards**.