



KENYA MARKET ASSESSMENT **POLICY BRIEF**



ATNi's Kenya Market Assessment 2025:
Assessing Product Healthiness and Corporate
Practices of Kenya's Largest F&B Companies

PUBLIC HEALTH IMPLICATIONS OF THE GROWTH IN MODERN FOOD RETAIL

Kenya is leading the way on the continent in creating a policy environment which safeguards the health of Kenyan citizens and curbs rising health costs. However, it stands at a crossroads, with a shrinking window of opportunity to introduce policies to support all Kenyans in accessing healthy, nutritious foods. Economic development, urbanization, globalization and the rise in modern retail, have led to increased availability and consumption of processed, energy-dense foods (high in fat, salt and sugar and often micronutrient poor).

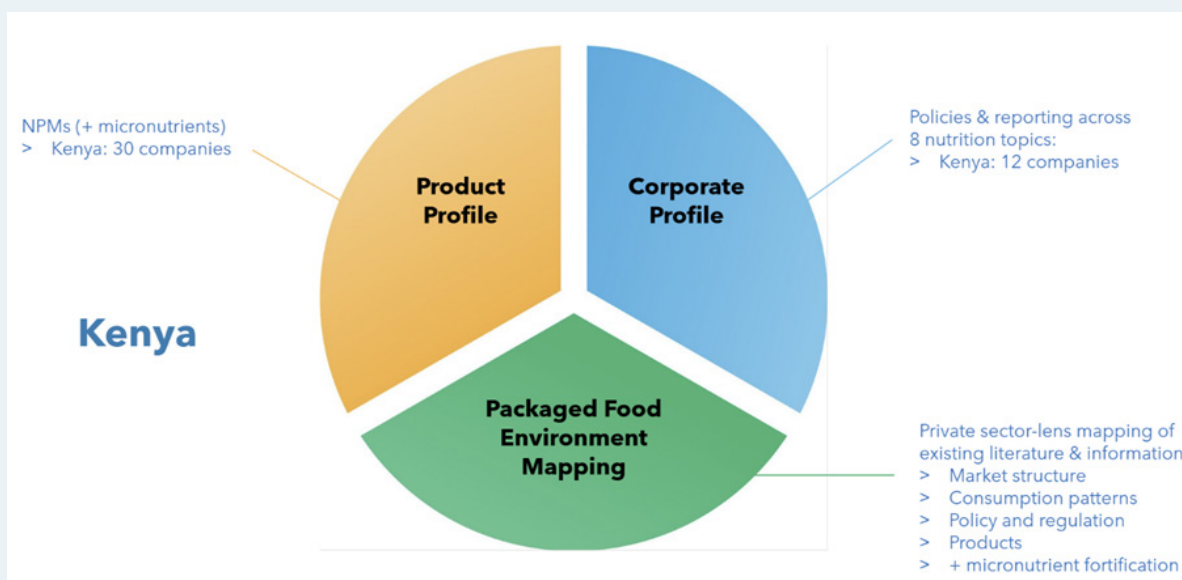
In Kenya, these trends contribute to a complex nutrition landscape characterized by the coexistence of multiple forms of malnutrition. Currently, an estimated 45% of Kenyan women are overweight or obese, 27.8% of the Kenyan population is undernourished, while 10.8% of adults are living with obesity, and micronutrient deficiencies continue to be prevalent amongst women and children.^a

METHODOLOGY AND SCOPE

The [Kenya Market Assessment](#) provides an objective snapshot of what companies are doing, and what they're not doing, to support access to affordable nutritious food for all. ANTi's assessment methodology consists of three components (Figure 1):

- 1 **Mapping Kenya's Food Environment (FEMR):** ATNi's FEMR scoped the broader literature on the food environment, including existing policies in Kenya to support access to healthy, safe and nutritious foods, with a specific focus on processed, packaged food and fortification. The report is available [here](#).
- 2 **Product Profile:** the product profile assesses the healthiness of the 30 largest processed and packaged foods covering 57% of the overall market share. Four nutrient profiling models (NPM) were used. The full report is available [here](#).
- 3 **Corporate Profile:** the corporate profile assesses nine Kenyan-based and three globally-headquartered companies on their corporate policies and practices to increase access to nutritious and affordable foods (Figure 2).

FIGURE 1
COMPONENTS OF THE KENYA MARKET ASSESSMENT



^a Kenya [Internet]. World Obesity Federation Global Obesity Observatory. [cited 2025 Mar 20]. Available from: https://data.worldobesity.org/country/kenya-113/#data_prevalence

FIGURE 2
COMPANIES ASSESSED IN THE KENYA CORPORATE PROFILE ASSESSMENT



The Corporate Profile methodology uses the [2024 ATNi Global Access to Nutrition Index methodology](#) with significant adaptations to the Kenyan context.

KEY FINDINGS

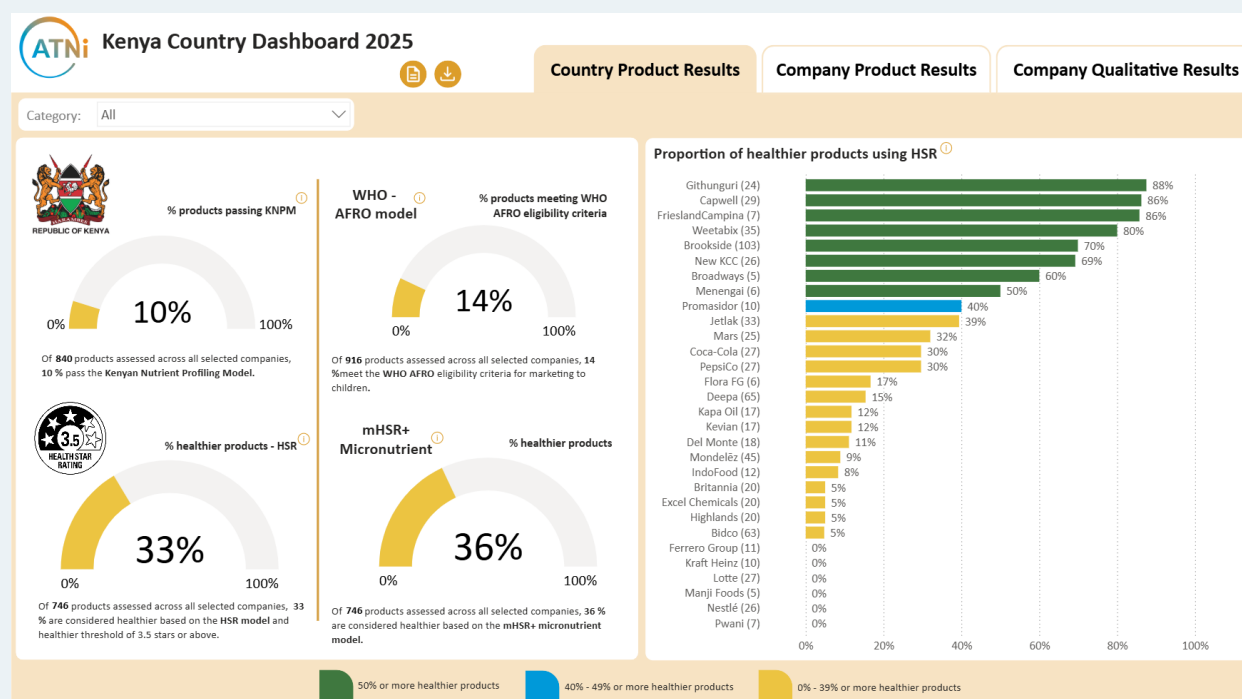
Product Profile

These findings are based on the 30 largest processed and packaged food manufactures in Kenya and assess the healthiness of products they sell in Kenya, which represent 57% of the market share in country for processed and packaged foods.

- The healthiness of the 30 food and beverage companies' portfolios in the Kenyan market is low. Using the Kenyan nutrient profile model (KNPM), only 10% of products "passed" the model's criteria (meaning that they are not high in salt, fat or sugar). This result is stricter than the other three NPMs used in ATNi's Product Profile assessment (Figure 3).
- Companies are voluntarily fortifying their processed, packaged non-staple foods in Kenya. 24 companies had at least one product for which micronutrient data was available. However, only 32% of fortified products assessed using the HSR could be considered 'healthy.'



FIGURE 3
COMPARISON OF THE HEALTHINESS OF PRODUCTS IN KENYA ACROSS DIFFERENT MODELS



Source: [ATNi's Kenya Country Dashboard](#)

Corporate Profile

These findings are based on the 12 companies that ATNi assessed based on their corporate policies and practices.

- Macronutrients and Food Components:** Only two companies (Flora FG and Nestlé) were found to have published global targets to address nutrients of concern (but did not report on specific application or progress in Kenya). None of the Kenya-headquartered companies had published reformulation strategies or targets.
- Micronutrients and Fortification:** Seven of the 12 companies assessed were found to be fortifying their products. 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 and WHO/FAO guidelines.
- Affordable Nutrition:** Affordability is a key selling point for companies in Kenya, however none of the companies have a strategy to deliver affordable nutrition. Companies need to identify appropriate price points for healthier products, particularly for low-income consumers.
- Responsible Labelling:** None of the 12 companies assessed have explicitly committed to only place nutrition and health claims on products meeting specific nutrition criteria.
- Responsible Marketing:** Three companies—Coca-Cola, Flora FG, and Nestlé, were found to have published global commitments for responsible marketing to children, although 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.

POLICY RECOMMENDATIONS

The recommendations below are from a workshop in Nairobi with a group of Kenyan policymakers from the Ministry of Health as well as other development partners including UNICEF, several civil society organizations and academics on 1 July 2025.

To improve portfolio healthiness:

1 **Mandate the use of the KNPM to improve the food environment**

- Adopt and mandate the use of the KNPM for food environment related policies, including front-of-pack labelling and the use of nutrition and health claims.
- An independent monitoring and evaluation system must be included as part of the roll out of the KNPM, with enforcement mechanisms to ensure that companies are complying and penalized if not.

2 **Product reformulation to remove nutrients of concern**

- Implement voluntary reformulation targets for nutrients of concern, with the option to make these mandatory in the event of insufficient industry progress and participation.

3 **Improving the micronutrient content of processed, packaged foods while avoiding 'health halos'**

- In addition to existing fortification regulations on staple foods, use KNPM criteria or national dietary guidelines to determine processed, packaged foods suitable for fortification.
- Mandate that any food products formulated using staple ingredients, subject to mandatory fortification regulations, must use the fortified versions of those staples.
- Mandate the disclosure of levels of inherent and added micronutrients on back-of-pack labels, and standardize measurement units.

4 **Implementing fiscal incentives to improve food environments**

- Implement additional health oriented fiscal measures such as excise taxes, that encourage reformulation of products high in nutrients of concern, namely: salt, sugar and saturated fats.
- Modify the existing SSB tax to be based on levels of sugar content and explore options for similar tax measures on other categories of public health concern.
- Subsidies or tax incentives to produce healthier products should also be considered as affordability of healthier foods is a key barrier to consumption.

To guide consumer choice:

5 **Align health and nutrition claims and front-of-pack labelling with the KNPM**

- Review existing health and nutrition claims regulation to specify that claims may only be placed on labels of 'healthy' products as defined by the KNPM.
- Implement mandatory front-of-pack nutrition warning labels as specified in the KNPM.

To limit children's exposure to harmful marketing:

6 **Base restrictions on marketing of 'unhealthy' foods to children on the KNPM**

- Use the KNPM to guide restrictions on the marketing of 'unhealthy' processed, packaged foods to children across all media channels and techniques, including online and indirect channels (e.g. influencers) and marketing in and near primary and secondary schools, and as part of the watershed period for broadcast media marketing to children under 18.
- Collaborate with other government authorities (e.g. local government, live broadcasting authorities) to ensure effective policy implementation.



**NOW IS THE
TIME TO PUSH
THESE POLICIES
FROM PAPER TO
IMPLEMENTATION**

CALL TO ACTION

Modern retail, and specifically processed, packaged foods, are increasingly part of Kenyan diets. Food manufacturers and retailers have a key role to play in ensuring that the foods available support a healthy and active life for all citizens throughout the life course; however, this study shows that they are failing to create products which support the health of all Kenyans. The government of Kenya has taken impressive steps towards improving the food environment, however, now is the time to push these policies, moving them from paper to implementation.