THE PHILIPPINES RETAIL ASSESSMENT 2025

Country Report

ATNi
NUTRITION
MARKETS
IMPACT

THE PHILIPPINES RETAIL ASSESSMENT 2025

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ABOUT ATNi

ATNi (Access to Nutrition initiative) is a global foundation headquartered in the Netherlands that actively challenges the food industry, investors, and policymakers to shape healthier food systems. Its mission is to transform markets so that, by 2030, at least half of companies' food and beverage sales are derived from healthy products. ATNi analyzes and translates data into actionable insights, driving financing, partnerships and innovations for market transformation so that all people have access to nutritious and sustainable food. ATNi is overseen by an independent board and advised by an international academic expert group that works pro bono. The organization is funded, among others, by the Gates Foundation and the UK Foreign, Commonwealth and Development Office. More information about ATNi's governance and operating policies is available online.

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ACRONYMS

ATNi	Access to Nutrition initiative
CAGR	Compound annual growth rate
DOST-FNRI	Food and Nutrition Research Institute – Department of Science and Technology
ESG	Environmental, Social, and Governance
FAO	Food and Agriculture Organization of the United Nations
FOP	Front-of-pack
F&B	Food and beverage
GNI	Gross National Income
HFSS	High in fat, sugar, and salt
HHI	Herfindahl-Hirschman Index
HSR	Health Star Rating
NNS	Non-nutritive sweeteners
NPM	Nutrient Profile Model
PHP	Philippine Peso
PNPM	Philippine Nutrient Profile Model
PPP	Purchasing power parity
SASB	Sustainability Accounting Standards Board
SEARO	South East Asia Regional Office
UNICEF	United Nations Children's Fund
UPF	Ultra-processed food
USD	United States Dollar
WHO	World Health Organization
WPRO	Western Pacific Regional Office

GLOSSARY

Key terms are outlined below; the full glossary is available in the Retail Assessment 2025 Scope and Methodology Report.

Convenience store: Grocery retail outlets that sell a wide range of groceries and are typically characterized by extended opening hours, a selling area under $400m^2$, and a range of foodservice products such as take-away or made-to-order hot foods [Euromonitor International, Passport].

Hypermarket: Similar to supermarkets but larger, with over $2{,}500m^2$ of selling space. Hypermarkets also sell a range of non-grocery merchandise and areare frequently located on out-of-town sites or as the anchor store in a shopping centre. In the United States, these are often referred to as 'supercenters'. Cash and carry stores, warehouse clubs and mass merchandisers are excluded. [Euromonitor International, Passport].

Modern grocery retail: Aggregation of modern grocery channels such as supermarkets, hypermarkets, convenience stores, discounters, warehouse clubs, and food/drink/tobacco specialists, including independent outlets [Euromonitor International, Passport]. It is distinguished from traditional grocery retail, which includes small, independent shops, market stalls, and informal vendors. In this report, modern grocery retail is defined as total grocery sales minus those via small local retailers.

Operating brand: The retail brand name under which a retailer operates its physical or online stores. A single parent company may own and manage multiple operating brands. For example, Food Lion is an operating brand of Ahold Delhaize USA, and Intermarché is an operating brand of Les Mousquetaires. Sometimes referred to as 'grocery brands', 'trading brands', or 'retail banners'.

Private label: A product or brand made by a third-party but sold exclusively under a retailer's own proprietary brand label, with the retailer controlling all aspects. Sometimes referred to as 'own brand'.

Retail food environment: A subtype of the food environment relating to the physical and economic settings where people purchase food and beverages, such as supermarkets, convenience stores, restaurants, and vending machines. It includes the availability, affordability, quality, and marketing of food products within these outlets, which can influence consumer choices and population health.

Sari-sari: A sari-sari store is a small, usually home-based neighbourhood convenience shop common across the Philippines, operating mostly in the informal sector and selling low-cost daily essentials in small quantities.

Supermarket: Retail outlets selling groceries such as non-perishable products (e.g. rice, pasta and sauces), fruit and vegetables, beverages and household products. They usually have a selling space of between 400 and $2{,}500m^2$. Excludes discounters, convenience stores and small independent grocery stores [Euromonitor International, Passport].

Ultra-processed food (UPF): The term is used with some variation across reports and studies but is most commonly defined according to the NOVA classification. UPFs are foods made mostly from industrial ingredients and additives, with minimal or no unprocessed food content. These additives, introduced during manufacturing to enhance taste, texture, and shelf life, result in products such as sweet and savoury snacks, instant noodles, confectionery, meat substitutes, and soft drinks [Food Systems Dashboard].

SUMMARY

PURPOSE AND SCOPE

ATNi's Philippines Retail Assessment 2025 evaluates how leading food retailers in the Philippines influence access to nutritious and affordable foods. It examines what retailers state they aim to achieve through their nutrition strategies, targets, and governance, and compares this with independent assessments of their actual practices. This includes analyses of their product portfolios, promotional activities, and the pricing of 'retail' food baskets.

The findings provide a picture of how retailers shape food environments and highlight opportunities to enhance their role in promoting healthier and more equitable diets. For the Philippines, the analysis includes three of the country's largest grocery retailers: Puregold Price Club (16–18% market share), SM Markets (16–18%), and Robinsons Retail (7–9%). The performance measures—product profile, promotions and pricing analysis—focus on the operating brands Puregold, SM Supermarket, and Robinsons Supermarket.

RESEARCH METHODOLOGY

The assessment uses a harmonized methodology developed by ATNi, applied consistently across six countries representing different income levels. It integrates multiple data sources—including corporate disclosures, publicly available information, and curated third-party datasets—to construct a robust and comparable evidence base.

The Retailer Profile qualitatively assesses the extent to which the three largest retailers– Puregold Price Club, SM Markets, and Robinsons Retail—address nutrition within their business practices and commercial strategies. It evaluates whether they go beyond regulatory compliance to support healthier diets. The assessment draws primarily on publicly available information, as none of the three retailers engaged during the research process.

The Product Profile assesses the nutritional quality of private-label packaged foods and beverages using internationally recognized Nutrient Profile Models (NPMs). It also analyzes promotional practices and affordability through established international analytical frameworks aligned with global nutrition guidance, such as the 2019 EAT-Lancet reference diet.

By combining these elements, the integrated approach enables both context-specific insights for Indonesia and cross-country comparisons, providing a solid foundation for informing retailers, investors, and policymakers in their efforts to foster healthier food retail environments.

KEY FINDINGS

GROCERY RETAIL LANDSCAPE

Traditional retailers remain the primary source of grocery purchases in the Philippines, but the modern grocery retail sector—led by supermarkets and hypermarkets—is expanding rapidly, driven by urbanization, a growing middle class, and rising demand for convenience. Although grocery stores are still concentrated in major urban centres, investment in distribution and cold-chain capacity is extending access across the archipelago. Retailers are also introducing smaller convenience formats to compete more directly with sari-sari stores.

At the same time, obesity rates and the consumption of highly processed, nutrient-poor packaged foods are increasing, especially in urban and higher-income households. As modern grocery retailers become more prominent sources of these products , alongside traditional channels, their influence on the nutritional quality of the food environment is growing.
Against this backdrop, the retail market remains highly fragmented, though consolidation is gradually increasing. Three large, domestically-headquartered and publicly listed retailers—SM Markets, Puregold Price Club, and Robinsons Retail—collectively account for about 40% of modern grocery sales, reflecting rising corporate control over the packaged food and beverage (F&B) market.

RETAILER ASSESSMENT FINDINGS

Retailer Profile: Nutrition strategies and corporate commitments

Public disclosures indicate that SM Markets and Puregold—the two largest grocery retailers in the Philippines—have made limited active efforts to promote healthier food environments or improve consumer diets. This is concerning given their combined share of roughly one-third of the modern grocery retail market. In contrast, Robinsons Retail, the country's third-largest retailer, has a nutrition commitment through Robinsons Supermarket, including a partnership with the Department of Science and Technology–Food and Nutrition Research Institute (DOST-FNRI) to identify and label healthier products. However, no evidence was found of similar initiatives across Robinsons' other operating brands, which account for a substantial share of its total sales.

Overall, nutrition was not treated systematically as a core commercial or Environmental, Social, and Governance (ESG) risk across all three retailers assessed. Very few specific, time-bound targets were identified for healthier product sales, portfolio reformulation, or affordability of nutritious options.

Retailer Profile: Marketing policies and consumer information

Structured policies to promote healthier choices through in-store marketing and labelling remain limited. Robinsons Supermarket applies its 'Green Tag' logo within dedicated Health & Wellness sections and offers a 'Healthy You' private-label line; however, the underlying nutrient criteria and pricing approach are unclear. No comparable initiatives were identified for SM Supermarket or Puregold.

None of the three retailers has published commitments on responsible marketing to children, near schools, or on the marketing of breastmilk substitutes and commercially produced complementary foods in line with the Philippines Milk Code (of 1986). Overall, nutrition-related policies remain fragmented and largely voluntary, reflecting earlier ATNi findings that most commercial complementary foods are sold through modern retailers and fail to meet World Health Organization (WHO) Nutrient and Promotion Profile Model.[1, a]

Product Profile: Nutritional quality and levels of processing

The nutritional quality of private-label portfolios produced and marketed by the three assessed retailers in the Philippines was low, with an average Health Star Rating (HSR) of 2.3 out of 5 (67 products in total). Only 28% of assessed products met the 'healthier' HSR threshold of 3.5 or above—well below the 41% average across all retailers in ATNi's multi-country assessment.[b] Nutri-Score and WHO regional models were consistent, indicating that only a small proportion of private-label products qualify as 'healthier' or are eligible for marketing to children.

Under the combined approach assessing products high in fat, sugar, and salt (HFSS) and/or containing markers of ultra-processing (colours, flavours, or non-nutritive sweeteners), the majority of private-label products from Philippine retailers were classified as unhealthy—94% for SM Supermarket and 91% for Robinsons Supermarket—exceeding the overall average of 86% across all 18 retailers included in the assessment.[c]

Private-label portfolios performed similarly to those of 16 leading manufacturers active in the Philippines (mean HSR 2.1), contrasting with the broader cross-country pattern where private-labels tend to perform better. Overall, the findings point to limited availability of healthier private-label options and highlight opportunities for stronger reformulation and innovation. They also reinforce the value of assessing portfolios with complementary models that capture both nutrient composition and processing indicators.

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[a] The Nutrient and Promotion Profile Model supports appropriate promotion of food products for infants and young children 6–36 months in the WHO European Region.

[b] Excluded categories from private-label products: baby food, alcohol, and health supplements, due to incompatibility with the selected NPMs. Fresh produce and foods prepared in-store were also excluded.

[c] Puregold private-label products were not included in the analysis due to insufficient data availability.

Promotions

Promotional practices in the Philippines similarly favoured less healthy products. Across the two retailers assessed, healthy foods received limited flyer space—20% at Robinsons and 12% at SM Supermarket. Meanwhile, unhealthy products dominated, accounting for 62% of promotions at SM Supermarket.[d] Refined grains, baked goods, and snacks were the most frequently promoted categories, followed by sweets and ice cream, while fruits, vegetables, legumes, and whole grains were rarely featured, collectively accounting for less than 5% of all promotions. Overall, current promotional strategies continue to prioritize less healthy products and reinforce consumer exposure.

Affordability of healthier and less healthy food baskets

At both SM Supermarket and Robinsons, healthier retail food baskets were consistently more expensive than less healthy ones, mirroring patterns across all nine retailers in the multi-country analysis. At SM Supermarket, the healthier basket cost purchasing power parity (PPP)-adjusted USD 19.22 per person per day versus USD 13.03 for the less healthy basket, while at Robinsons the healthier basket was about 60% more expensive (USD 26.00 vs USD 16.19)—the largest gap observed.

Both baskets absorbed a significant share of income. At SM Supermarket they required roughly 50% (healthier) and 35% (less healthy) of daily per capita gross national income (GNI), rising to over 70% and 44% at Robinsons, respectively. Even in PPP terms, diets sourced from modern retail remain only marginally affordable for many households, and the consistently higher cost of healthier baskets pushes price-sensitive consumers toward cheaper, less healthy foods.

These findings should be considered within the broader food system context: the baskets reflect purchases from large formal retailers and do not capture fresh produce or foods bought in traditional or informal markets, which remain critical for many Filipino households. Nevertheless, the results underscore the challenge of making healthier diets affordable through modern retail and the need for retailers and policymakers to address pricing, promotion, and fiscal measures to narrow the cost gap between healthier and less healthy foods.

CONCLUSION

ATNi's Philippines Retail Assessment 2025 shows that, while leading grocery retailers are expanding rapidly and beginning to reference nutrition in their strategies, this has not yet translated into consistently healthier and more affordable food environments. Supermarkets' private-label portfolios are dominated by highly processed products, promotions overwhelmingly favour less healthy categories, and explicit policies to safeguard children from unhealthy food marketing are lacking.

At the same time, healthier retail food baskets are substantially more expensive and less affordable than less healthy ones, particularly at Robinsons Supermarket, where the healthier basket requires more than two-thirds of average daily per capita GNI. In this context, current retailer strategies do not sufficiently address the structural barriers that prevent healthier options from being both accessible and affordable and becoming the norm.

To foster healthier and more equitable diets, Philippine retailers will need to go beyond improving availability and commit to reshaping portfolio composition, promotional practices, and affordability strategies—supported by stronger governance, measurable targets, and transparent reporting. In parallel, policymakers can leverage strong regulatory instruments—such as nutrient profile models, front-of-pack labelling, fiscal measures, and marketing restrictions—to align retail incentives with national nutrition and health goals.

[d] Puregold was excluded from the flyer analysis, as neither PDF nor web-based promotional materials were found.

INTRODUCTION

RETAILERS AND THE FOOD ENVIRONMENT

While traditional retailers remain the primary source of grocery purchases in the Philippines, the modern grocery retail sector is expanding rapidly. To better understand its influence on public health, ATNi developed the Retail Assessment 2025, which evaluates leading food retailers in the Philippines and their commitments, policies, and practices related to nutrition and health. The assessment provides evidence to strengthen accountability and guide progress toward creating healthier food environments.

The grocery retail environment—where food is purchased for immediate or later consumption—represents a major component of the physical food environment and plays a critical role in shaping dietary patterns. Food retailers influence consumer choices through their decisions on product formulation, pricing, placement, and promotion, thereby shaping the visibility, affordability, and desirability of different foods. Their strategies can therefore either support or hinder healthier diets, depending on how they prioritize and promote nutritious products.

In the Philippines, obesity rates and the consumption of highly processed, nutrient-poor packaged foods are rising—especially in urban households. As modern grocery retailers become more prominent sources of these products (alongside traditional channels), their influence on the nutritional quality of the food environment is growing.

METHODOLOGY

ATNi's Retail Assessment 2025 comprises tailored research components applied consistently across 18 retailers in six countries: the United States, France, Indonesia, South Africa, the Philippines, and Kenya. As outlined in the full methodology, the assessment provides a transparent, evidence-based approach to evaluating how the modern grocery retail sector shapes food environments and nutrition outcomes.

The methodology was developed in consultation with experts in nutrition, public health, food policy, and retail, and reviewed by an independent advisory group to ensure scientific rigor and policy relevance.

Together, the research components offer an integrated view of how modern grocery retailers influence food environments through their policies, practices, and pricing strategies. The analysis includes corporate nutrition-related policies and disclosures, as well as independent assessments of retailers' promotional activities, private-label product portfolios, and the relative affordability of healthier versus less healthy retail food baskets. These are complemented by a review of national policy and regulatory frameworks to identify gaps and opportunities for stronger alignment between retail action and public health objectives.

Research was conducted between November 2024 and November 2025. This report presents the findings for the Philippines, applying the methodology to three leading retailers: Puregold (Puregold Price Club), SM Supermarket (SM Markets), Robinsons Supermarket (Robinsons Retail Holdings). The analysis offers valuable insights into how major retailer shape food environments, though it is limited to three national retailers and focuses primarily on packaged private-label products (where production and marketing are fully controlled by the retailers), excluding regional variation and the broader product offer. In addition, gaps in data availability meant that not all three retailers could be consistently included across all analysis of the assessment. By using a consistent set of indicators and analytical procedures across all six countries, the assessment generates detailed country-level insights and enables meaningful cross-country comparison within a broader global perspective on food retail and nutrition.

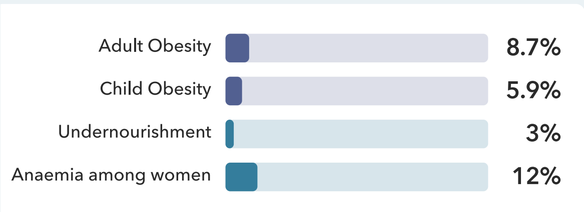
MAPPING THE RETAIL LANDSCAPE

Mapping the Philippine grocery retail environment provides essential context for interpreting the broader findings of ATNi's Retail Assessment 2025. This section offers a descriptive overview of the size, structure, and dynamics of the modern grocery retail sector, outlining key players, ownership patterns, and the consumer and policy factors shaping food retail within the broader Philippine food system.

NUTRITION CONTEXT: MALNUTRITION AND DIETARY PATTERNS

The triple burden of malnutrition remains a major public health concern in the Philippines (Figure 1), despite progress in reducing undernourishment (17.6% (2004–2006) to 3.0% (2022–2024)).[2] Rates of obesity are rising: among children and adolescents (5–19 years), obesity more than doubled from 2.8% to 5.9% (2012–2022), and among adults (>18 years) increased from 5.7% to 8.7%.2–4 The Philippine government estimates even higher rates among adults: 10.3% (WHO classification) up to 39.8% (Asia-Pacific classification), with higher rates among urban residents and higher-income groups.[3]

FIGURE 1
PREVALENCE OF MALNUTRITION IN THE PHILIPPINES



Source: FAO and WHO[2-4]

Micronutrient deficiencies also persist, though their public health significance has declined. Anaemia among women (15–49 years) fell from 18.7% to 12.0% between 2012 and 2022, with both iron and protein deficiency among pregnant and breastfeeding women identified as a major concern by Philippine health authorities.[2,5] Calcium, vitamin A, and vitamin C intake are also low across most age groups, leaving many short of daily nutrient needs.[5]

These outcomes reflect shifting dietary patterns, marked by low consumption of nutrient-dense foods (vegetables, fruits, pulses, whole grains, and animal-source foods) and high intake of refined carbohydrates, fats, and salt—especially from rice, sweet foods, salty and fried snacks, and sugar-sweetened beverages.[6-9] For example, 20-29% of women of reproductive age fail to meet minimum dietary diversity (consuming at least 5 of 10 food groups).[7,9]

While lower-income households consume proportionately more rice and vegetables, higher socioeconomic groups consume more animal-based products, potentially reflecting differences in access, according to the government's Food and Nutrition Research Institute – Department of Science and Technology (DOST-FNRI).[5]

BOX 1
POLICY: NUTRITIONAL GUIDELINES FOR FILIPINOS

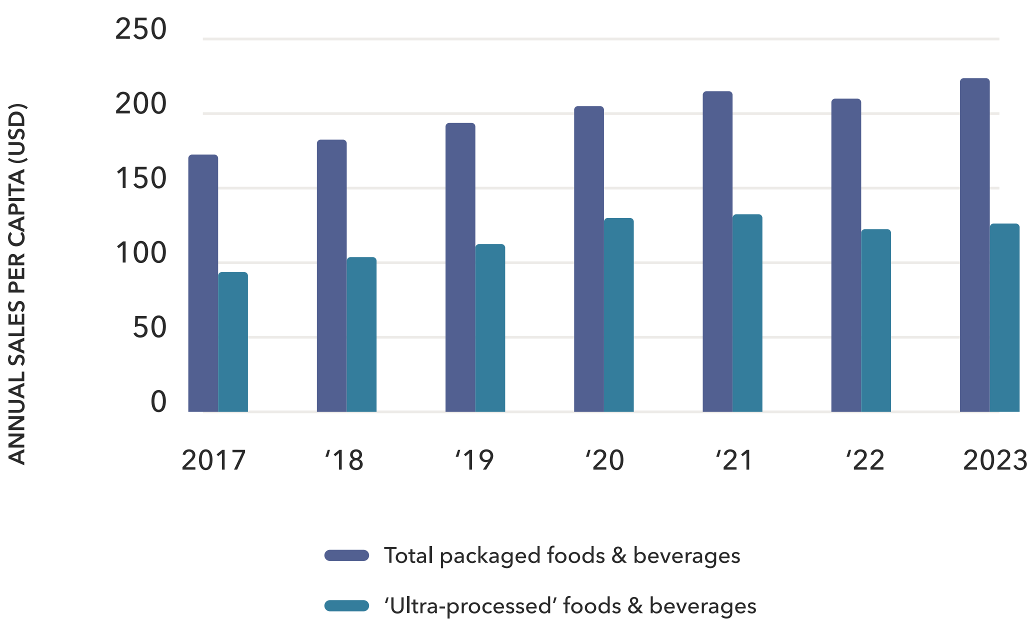
DOST-FNRI has established several food-based dietary guidelines—the Daily Nutritional Guide Pyramid, the Nutritional Guidelines for Filipinos, and the plate-based Pinggang Pinoy. These tools promote diverse, balanced dietary patterns, recommending two to three servings of fruit and three servings of vegetables daily, or roughly half a plate of fruits and vegetables at each meal.[5]

Economic and demographic changes—including rapid growth, a young and urbanizing population, and a rising middle class with greater disposable incomes—have increased demand for more varied, convenient, and Western-style foods, many of which are highly processed and energy-dense.[10-14] The modernization of the food retail sector, supported by improved cold chain and distribution systems, has further expanded the availability and affordability of such products nationwide.[14,15]

These market changes are reflected in packaged food consumption trends: packaged foods and beverages sales have grown at a 5.3% compound annual growth rate (CAGR) since 2017, reaching USD 232.5 billion in 2024. Categories dominated by ultra-processed foods (UPF) have expanded even faster (6.0% CAGR), now accounting for nearly 56% of total packaged F&B sales (Figure 2).[16,17,e] However, UPF-category consumption per capita in the Philippines (USD 125) is still below the average for South East Asia (USD 155).[16]

[e] UPF is defined as "foods made of mostly industrial ingredients and additives with minimal amounts of unprocessed foods. These additives are not naturally occurring in the food, but are added in the processing phase to increase palatability and shelf-life. Examples of UPFs include sweet and savory snacks, instant noodles, confectionery, meat substitutes, and soft drinks, among others."[16]

FIGURE 2
PACKAGED F&B SALES AND UPF CATEGORY GROWTH IN THE PHILIPPINES, 2017-2023[6,d]



BOX 2

POLICY: PHILIPPINE PLAN OF ACTION FOR NUTRITION 2023-2028

The Philippine Plan of Action for Nutrition (PPAN) serves as the government's six-year strategic framework to reduce all forms of malnutrition across life stages, and improve the food environment.[18] The PPAN outlines policy directions and defines the roles of multiple stakeholders–including the private sector–in increasing the availability, accessibility, and affordability of nutritious foods. It also calls for a range of market transformation measures such as marketing regulations on unhealthy food, taxes on HFSS foods, subsidies for fruit and vegetables, and front-of-pack labelling, which would affect the activities of both food manufacturers and retailers.[18]

In parallel, the government is scaling up social protection initiatives to reduce hunger and improve dietary quality. The Walang Gutom Programme, a national food stamp programme, provides beneficiaries with Electronic Benefit Transfer cards loaded with PHP 3,000 per month to purchase a select list of food commodities from accredited stores. The programme also incorporates nutrition development sessions, requiring participating households to attend classes on healthy eating and food preparation to support longer-term behaviour change. The Walang Gutom Programme is also being integrated with the Benteng Bigas Meron Na Program, enabling beneficiaries to access rice at PHP 20 per kilo from accredited cooperatives and micro, small, and medium enterprises, thereby supporting both nutrition and local economic activity.[19]

In June 2025, the Department of Social Welfare and Development announced the enrolment of an additional 300,000 household beneficiaries into the programme, expanding its reach to a total of 600,000 beneficiaries and increasing its potential impact on local food environments. Early evidence suggests the programme is delivering positive results, contributing to reductions in involuntary hunger among participating households.[20]

MODERN GROCERY RETAIL LANDSCAPE

The increasing prevalence of highly processed packaged foods in Philippines' diets is closely linked to the expansion of the grocery retail environment. Retail dynamics shape consumer access and exposure to both healthy and less healthy products.

The Philippines' grocery retail sector (excluding e-commerce) is valued at USD 59.8 billion in 2024.[17]

- Of this, an estimated 37.4% takes place through modern retail formats.[f]
- The majority (62.6%) continues to take place through traditional 'small local grocers,' such as wet market stalls, sari-sari stores, and street vendors.[10,17,g] There are an estimated 1.3 million sari-sari's across the country, and 87–94% of consumers across both urban and rural setting report using them.[21,22]

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[f] I.e. supermarkets, hypermarkets, convenience stores, discounters, warehouse clubs, and food/drink/tobacco specialists, including independent outlets [Euromonitor International, Passport].

[g] It is plausible that the traditional grocery sector exceeds Euromonitor's estimates, given its focus on formally registered and tax-paying entities; however, no sources providing higher estimates, including the 'informal' traditional sector, were identified.

BOX 3
ORIGINS AND GROWTH OF PHILIPPINE MODERN GROCERY RETAIL

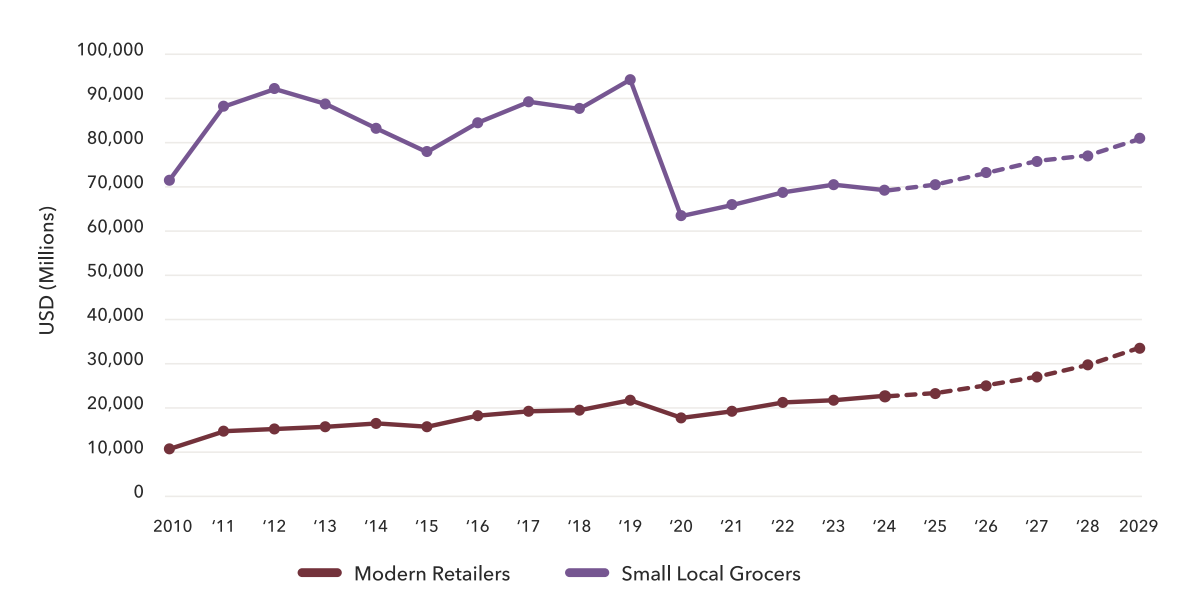
Supermarkets and department stores began arriving in the late 20th century, with Rustan's supermarket opening in 1970. SM Markets and Robinsons Retail established their first supermarkets in 1985, anchoring them in malls and quickly building a nationwide footprint.[23] The sector continued to grow throughout the 1990s with the largest players adopting modern technologies to facilitate procurement and inventory management.[24] Although the sector remained relatively small, the late 1990s saw a proliferation of formats, from mall-based and stand-alone hypermarkets and warehouse clubs, to small-scale supermarket outlets operated by smaller chains on a per-island basis.[23]

The 2000 Retail Trade Liberalization Act facilitated foreign investment into the sector and introduced new entrants, such as SHV Makro and PriceSmart, which were later absorbed by SM Markets and Robinsons Retail.[23-25] This had the combined effect of rapid expansion, with a year-on-year growth of 26% between 1999 and 2008 the sector, modernizing the sector and displacing traditional retailers.[23]

The relative importance of the modern grocery sector is increasing (Figure 3), with sales growing at 7.4% CAGR between 2010 and 2019, while traditional retailer sales declined overall.[17] Over the same period, the number of supermarkets more than doubled (+898 stores) and hypermarkets increased five-fold (+382 stores), whereas the total number of 'small local retailers' rose by only 11%.[17]

Although modern grocery retail growth slowed during and immediately after the pandemic, sales via traditional channels reportedly accelerated, according to Euromonitor, despite being disrupted by lockdowns.[17] The modern grocery sector is projected to return to faster growth again over the next five years, with a 7.2% CAGR (compared to 5.6% for traditional retail), further increasing the relative importance of modern retailers in shaping diets in the Philippines.[17]

FIGURE 3
HISTORICAL AND PROJECTED SALES GROWTH OF THE PHILIPPINES GROCERY SALES OF MODERN RETAILERS, 2010–2029



Source: Euromonitor International

MODERN VS. TRADITIONAL RETAIL CHANNELS

Recent analysis by Deakin University confirms this trend, finding that the share of processed food sold via modern grocery channels increased from approximately 59% in 2019 to 64% in 2021, with increases observed across all product categories analyzed.[10] In particular, modern retailers dominate sales of higher-value, perishable processed foods—including cheese (73%), processed meat, seafood, and meat alternatives (83%), and ready meals (91%)—which typically require cold-chain infrastructure and stricter quality control.[10]

Wet markets have traditionally been the primary source of fresh produce in the Philippines, including grains, meat, fish, chicken, and fruits and vegetables. However, this is increasingly challenged by modern retailers. For example, supermarkets such as SM's Save More, specialize in fresh produce and meat, while convenience stores offer ready-to-eat and fresh items at more accessible urban locations.[26,27] Even so, wet markets generally remain cheaper than supermarkets or convenience stores, particularly for fresh products.[28]

Traditional retailers remain the primary sources for purchases of several typically lower-priced, less healthy and often shelf-stable categories, such as baked goods (65%) and sweet biscuits, snack bars and fruit snacks (66%). However, modern retailers are also increasing their shares across these categories, now accounting for 48% of savoury snack sales (+6% percentage points, 2019–2021) and 56% of confectionery (+10 percentage points).[10]

BOX 4
MODERN RETAILERS AS WHOLESALE SUPPLIERS TO SARI-SARI STORES

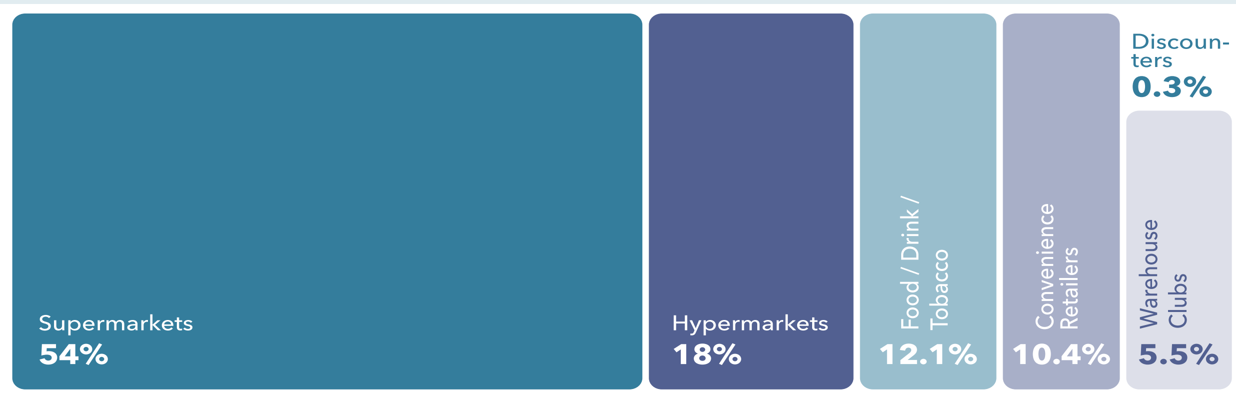
A distinctive feature of the Philippines' grocery market is that the largest modern grocery retailers supply products wholesale—including their private-label brands—to traditional retailers such as sari-sari stores. These retailers offer bulk discounts, promotions, and business support to sari-sari store owners, enabling them to purchase stock in bulk and to resell in smaller pack-sizes in local neighbourhoods.[29,30] The practice is led by Puregold Price Club's flagship programme, Tindahan ni Aling Puring , which has approximately one million members in 2025.[31]

During the COVID-19 pandemic, many traditional retailers became more reliant on these channels as manufacturers prioritized supplying larger supermarkets.[10] In addition to expanding modern retailers' distribution reach, such schemes help to cultivate brand recognition and loyalty.[31]

MODERN RETAIL FORMATS

As shown in Figure 4, the modern grocery retail market in the Philippines consists primarily of supermarkets (54%) and hypermarkets (18%).[17] Supermarkets' popularity is largely attributed to their strategic locations, typically in residential areas or inside shopping malls that consumers frequently visit for both shopping and leisure. However, although supermarket sales continue to grow in real terms, their market share has declined—falling by 3.6% since 2017 and projected to drop a further 4.8% by 2029.[17]

FIGURE 4
SHARE OF MODERN GROCERY MARKET BY RETAIL CHANNEL



Source: Euromonitor International

In contrast, convenience stores and warehouse clubs—though much smaller market share—are expanding rapidly. Since 2017, their shares have increased by 3.4% and 1.9%, respectively, and are expected to rise by a further 2.2% and 2.9% by 2029.[17]

Convenience stores have surged due to their positioning as more modern, sanitary, and convenient alternatives to traditional sari-sari's, offering accessible locations, longer opening hours, and food-to-go or dine-in options. These features make them particularly attractive to urban consumers seeking a modern retail experience.[30,33,34]

Warehouse clubs, meanwhile, are increasingly popular among middle- and upper-income consumers who—facing inflationary pressures—seek better value per unit and a wider range of imported products.[35]

BOX 5
THE GROWING ROLE OF E-COMMERCE

E-commerce remains a relatively small but rapidly expanding segment of the Philippines' grocery market, representing the equivalent to 1.6% of total physical sales—and 4.3% of modern grocery sales—in 2024, up from 0.2% in 2017.[17] In that time it has recorded a remarkable 35% CAGR, reaching a value of USD 741.4m—more than eight times its 2017 value.[17]

Major grocery retailers such as SM Markets, Puregold Price Club, and Robinsons Retail are increasingly adopting omnichannel strategies, offering mobile app-based shopping options alongside conventional physical stores.[36] While in-person shopping remains the norm, rising consumer prioritization of convenience, along with greater internet and smartphone penetration, is expected to drive e-commerce growth in the coming years.[36]

GEOGRAPHIC DISTRIBUTION AND ACCESS

Modern grocery retail in the Philippines remains highly urbanized, concentrated in large cities such as Metro Manila, Cebu, and Davao, with Metro Manila generating the largest share of revenues.[22,37,38] In recent years, major grocery retailers have expanded into mid-tier cities and rural areas, investing in smaller supermarket formats located in residential and high-traffic areas to improve accessibility.[26,27,39] Convenience stores, meanwhile, are typically located near residential areas, business centres, and commercial hubs, offering 24-hour service for both residents and night-shift workers.[25]

The country's archipelagic geography results in complex and expensive supply chains, particularly for cold-chain products, leaving many rural and remote areas underserved. In 2023, the Philippines only had 2.2 supermarkets per 10,000 people, nearly half the South East Asia average (4.0).[16] As a result, traditional retailers continue to dominate in both urban and rural regions, offering convenient locations, personalized service, and short-term credit to regular customers.[5,22,25,40]

The expansion of modern grocery retail in urban areas is closely linked to mall development. Major retailers like Robinsons Retail and SM Markets, through their subsidiaries Robinsons Malls and SM malls, use supermarkets and hypermarkets as anchor tenants to drive foot traffic. Malls' air-conditioned environments, public transport access, and varied retail and entertainment options make them key retail hubs. Puregold Price Club and other retailers without direct mall ownership also serve as anchor tenants for multiple malls across the country.

CONSUMER BEHAVIOUR AND PREFERENCES

SOCIO-ECONOMIC DIMENSIONS

There is limited recent evidence on the socio-economic profile of modern grocery shoppers in the Philippines. However, available research suggests that, given their predominantly urban and mall-based presence, these retailers are likely to skew towards consumers from higher socio-economic households, whereas low- and middle-income Filipinos continue to rely on traditional retailers.[5,22,41]

For consumers who live on or below minimum wage, sari-sari stores offer convenient options for purchasing food in small quantities and allow for buying on credit, which suits individuals with seasonal or daily income.[25]

BOX 6
THE GROWTH OF PRIVATE-LABEL SALES

To attract budget-conscious consumers, modern grocery retailers have been investing in their own private-label brands, typically priced between 20–30% lower than national brands.[29] Since 2020, private-label sales have represented 7–10% of the Philippines' grocery F&B sales, above the Asia Pacific average of 6%, with retailers aiming to grow their respective brands further.[29]

SHOPPING PATTERNS AND PREFERENCES

Consumers in the Philippines typically visit multiple grocery retail channels.[42] For example, the 2016 NielsenIQ survey found that, while almost all shoppers visit sari-sari stores (94%), the majority also visit supermarkets (71%) and wet markets (72%).[43]

A distinctive feature of shopping in the Philippines is known as tingi purchasing—buying goods in small, often single-use quantities on a frequent basis.[44] While this characterizes sari-sari shopping, given limited household refrigerator capacity, it extends to supermarkets and wet markets and has contributed to the growth of convenience stores.[24] Recent survey data found that Filipinos visit traditional retailers two to three times a week on average, compared with modern supermarkets once or twice a month.[22]

MARKET STRUCTURE & RETAILER CHARACTERISTICS

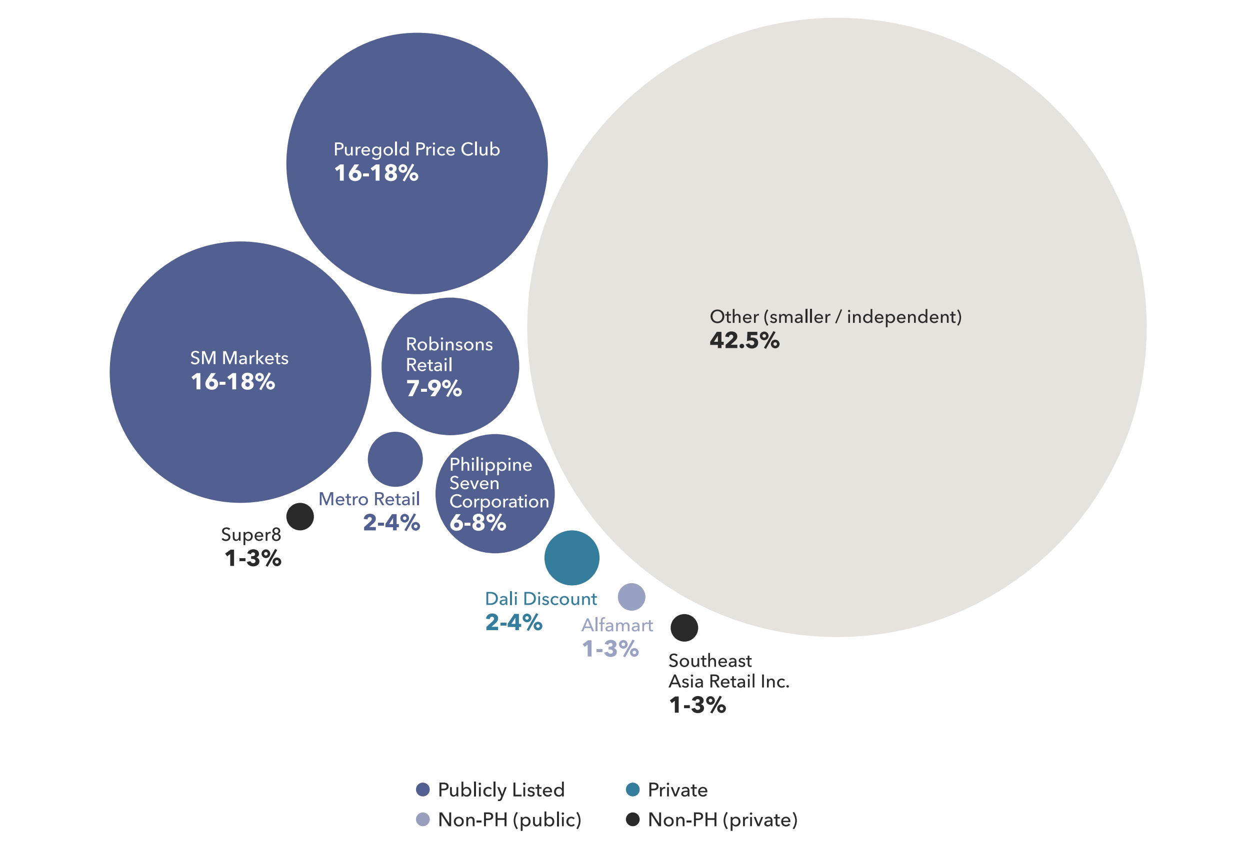
MARKET CONCENTRATION AND COMPETITION

The Philippines' modern grocery retail market has a low degree of concentration, with a Herfindahl-Hirschman Index (HHI) score of 687.2 (out of 10,000) in 2024.[17,h] Despite the three largest retailers—SM Markets, Puregold Price Club, and Robinsons Retail—accounting for a combined 41.3% market share (Figure 5), the next 13 largest retailers account for 23.4%, and independent (non-chain) modern stores make up the remaining 35.3%.[17]

However, recent acquisitions have begun to increase market concentration and expand regional footprints. Notably, in 2018, Robinsons Retail acquired the Rustan's and Shopwise chains from Hong Kong-based Dairy Farm Group and rebranded them as 'Marketplace.' In addition, in 2023, Puregold Price Club acquired DiviMart's supermarkets, extending its reach throughout Luzon island and more remote areas.[46,47] As a consequence, Puregold Price Club has significantly increased its market share over the last 2 years, now rivalling SM Markets in size.[17]

[h] The HHI is used to assess levels of market concentration. It is calculated by squaring the market share of each company competing in the market and then summing the resulting figures.

FIGURE 5
SHARE OF MODERN GROCERY MARKET BY RETAIL CHANNEL



Source: Euromonitor International

The majority of the largest grocery retailers in the Philippines are publicly listed and headquartered domestically (Figure 5), including Puregold Price Club, SM Group, and Robinsons Retail Holdings. This reflects stringent entry requirements for foreign retailers looking to break into the market (see Box 7), as well as increasing consolidation among the largest three established players.

Privately held retailers are less influential, given the challenges of competing with the economies of scale and capital investment available to publicly listed competitors. Privately owned retailers include Super8 Retail Systems, South East Asia Retail (which operates Landers Superstore), and Dali Discount (Switzerland-headquartered).

BOX 7
CHALLENGES OF MULTINATIONAL GROCERY RETAILERS IN THE PHILIPPINES

While the Retail Trade Liberalization Act (2000) opened the sector to foreign investment, encouraging several multinational retailers to enter during the 2000s, most struggled to compete with domestic requirements due to burdensome documentation, land ownership restrictions, mandatory public listing (minimum 30% equity), and limits on selling outside accredited stores.[25] Consequently, many withdrew or restructured through joint ventures with domestic retailers. For example:

- PriceSmart (United States) exited in 2005, with its stores being acquired and subsequently rebranded as S&R by Puregold Price Club.[48]
- Sumber Alfaria Trijaya (Indonesia) has operated convenience stores in the Philippines under the Alfamart banner since 2014 as a joint venture with SM Investments Corporation (owner of SM Markets).[49]

GOVERNANCE AND MANAGEMENT OF STORES

Supermarkets in the Philippines predominantly operate under corporate ownership and centralized control, although governance structures vary. While franchise models are uncommon in supermarket and hypermarket retailers, they are a common feature of convenience formats.

Leading retailers such as Puregold Price Club, SM Markets and Robinsons Retail are highly centralized, with decisions on product assortment, pricing, promotions and supplier contracts made principally at the corporate level. Meanwhile, other retailers employ multi-banner structures, allowing greater discretion at the divisional level. For example, Robinsons Retail Holdings operates across a number of banners, including Robinsons Supermarket, The Marketplace, and Shopwise, while SM Markets operates through SM Supermarket, SM Hypermarket, and Save More.

Convenience stores such as Alfamart and 7-Eleven use mixed models, combiningcorporate-owned and franchised outlets. Franchise models allow for rapid network expansion, with franchisees managing store-level operations under strict brand guidelines, while corporate teams oversee supply chain, pricing, and marketing.

KEY INSIGHTS FROM THE PHILIPPINES RETAIL FOOD ENVIRONMENT

Traditional retailers remain the primary source of grocery purchases in the Philippines, but modern grocery retail sector—led by supermarkets and hypermarkets—is expanding rapidly, driven by urbanization, a growing middle class, and rising demand for convenience. Although grocery stores are still concentrated in major urban centres, sustained corporate investment and improvements in distribution and cold-chain capacity have enabled greater access to modern grocery retailers across the archipelago. Retailers are also increasingly deploying smaller retail formats, such as convenience stores, to compete more directly with sari-sari stores.

At the same time, obesity rates and the consumption of highly processed, nutrient-poor packaged foods are rising—especially in urban and higher-income households. As modern grocery retailers become more prominent sources of these products (alongside traditional channels), their influence on the nutritional quality of the food environment is growing.

Against this backdrop, the modern grocery retail market remains highly fragmented, though consolidation is gradually increasing. Three large, domestically headquartered and publicly listed retailers—SM Markets, Puregold Price Club, and Robinsons Retail—collectively account for about 40% of sales, operating with high degrees of centralized corporate control over their different retail formats.

RETAILER PROFILES

Building on evidence that modern grocery retail is playing an increasingly prominent role in shaping Filipinos' diets, the Retailer Profile qualitatively assesses the extent to which the three largest modern retailers—Puregold Price Club, SM Markets, and Robinsons Retail—engage with nutrition, embed it within their commercial practices, and take steps beyond regulatory requirements to support healthier consumer diets.

This assessment draws primarily on publicly available information; although each retailer was invited to review the findings and provide additional evidence, none took the opportunity to do so.

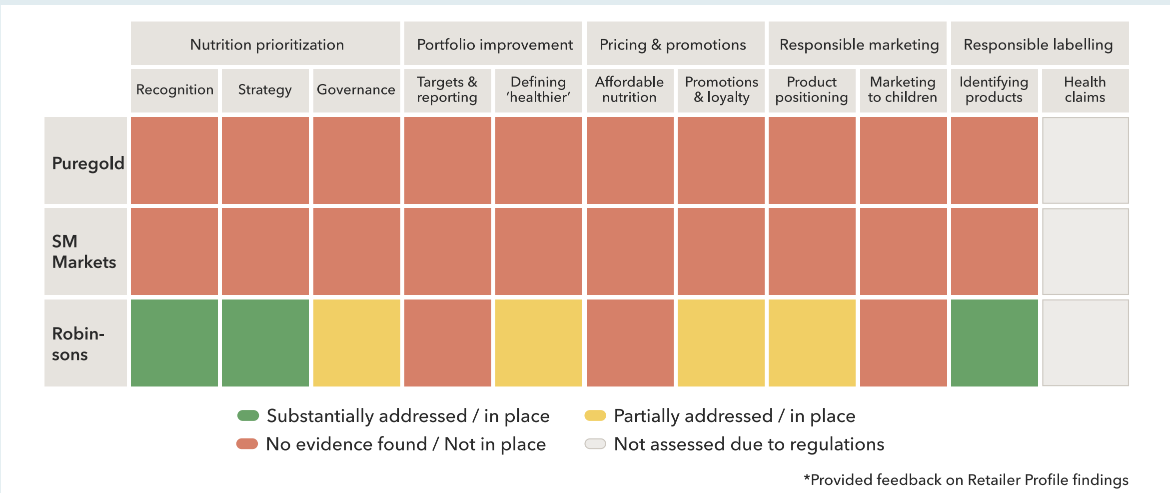
OVERALL FINDINGS

Based on their public disclosures, we conclude that active efforts to create healthier food environments and improve consumers' diets are, overall, largely absent among the Philippines' two largest grocery retailers—SM Markets and Puregold Price Club (Figure 6). This is particularly concerning, given that these retailers together account for 33.3% of the modern grocery retail market.[17]

Encouragingly, Robinsons Retail, the country's third largest retailer (7–9% market share), clearly commits to address nutrition in its retail operations and implemented several initiatives through its primary operating brand, Robinsons Supermarket, although there remain significant gaps in its efforts. In addition, no evidence was found regarding Robinsons Retail's other operating brands—Uncle John's (convenience stores), Marketplace (supermarkets), or Shopwise (hypermarkets)—which together account for almost 50% of its sales.[17]

In interpreting Figure 6, it is important to note that the green colour indicates areas that are substantially addressed or in place; however, this does not imply that performance is optimal, or that no further improvement is possible.

FIGURE 6
RETAILER PROFILE FINDINGS PER NUTRITION TOPIC AREA



IN-DEPTH FINDINGS

NUTRITION PRIORITIZATION & GOVERNANCE

Recognizing and addressing nutrition

Of the three retailers, only Robinsons Retail explicitly identifies nutrition as a material topic, featuring in the sustainability strategy of its primary operating brand, Robinsons Supermarket.[50] Of note, a commitment to consumer health also features in the Robinsons Supermarket mission and vision statements, and since 2017 the retailer has an ongoing partnership with the DOST-FNRI, a government nutrition body, to evaluate and label healthier products.[51]

While Robinsons Retail's Board of Directors oversees the development and implementation of the company's ESG approach through the Audit and Risk Oversight Committee and Corporate Governance and Sustainability Committee, it is not clear if this includes specific attention to nutrition.[50]

In contrast, no evidence was found that either SM Markets or Puregold Price Club prioritizes or addresses nutrition in their public disclosures and corporate strategies, with neither retailer identifying nutrition as a material topic in their materiality assessments nor as enterprise risks in their risk registers.

PORTFOLIO IMPROVEMENT

None of the three retailers assessed have set public targets to increase sales of 'healthier' products, or reported on the proportion of sales derived from such products.

As part of its reporting against the Sustainability Accounting Standards Board (SASB) standards, SM Markets' parent company—SM Investments—annually reports the 'Revenue from products labelled or marketed to promote health and nutrition attributes' (SASB code FB-FR-260a.1), while Robinsons Supermarket stated in its latest report (2024) that it plans to report on this metric within the next three years.[50,52] However, neither company disclosed how they define 'healthy' or 'nutritious' products as part of their reporting on this metric. The metric itself does not yet define 'healthier' using set thresholds for nutrients of concern, leaving this up to companies' discretion. ISSB's ongoing efforts to enhance the SASB Standards are expected to provide clearer guidance on how such metrics should capture product healthiness going forward.[53]

Similarly, no targets or reporting were identified among the retailers on reducing specific nutrients of concern or increasing the use of ingredients to encourage in their private-label portfolios.

BOX 8
POLICY: PHILIPPINE NUTRIENT PROFILE MODEL UNDER DEVELOPMENT

There is currently no NPM that has been formally endorsed by the Philippine government. However, since 2022, the Philippine National Nutrition Council has been developing the Philippine Nutrient Profile Model (PNPM). This is reported to be based on the PAHO Model, which was developed by the PAHO/World Health Organization (WHO) to inform front-of-pack (FOP) labelling schemes, determine which products do not sufficiently meet health standards and therefore should not be marketed to children, or, reversely, determine which foods are suitable to be included in social protection programmes or school feeding.[54]

In addition to providing a means for evaluating the healthiness of products, the model is also expected to be used as the basis for food marketing, taxation, and FOP labelling policies, all of which are likely to be applicable to retailers.[54]

PRICING AND PROMOTIONS FOR HEALTHIER PRODUCTS

Robinsons Supermarket states that it "commits to bring together healthy selections and affordable prices," while Puregold Price Club states that it "consistently offers the best prices for grocery goods," seeking to attract shoppers by offering "localized staples pricing and promo initiatives (at par or lower than benchmark competitor)."[51] However, no evidence was found for any of the retailers of specific strategies or policies in place to improve the affordability of healthier products in their offerings. The results of ATNi's independent pricing analysis, which assesses the pricing of healthier versus less healthy food baskets at SM Supermarket and Robinsons Supermarket, are presented in Chapter 7.

For example, Robinsons Retail's 'Healthy You' private-label brand has an explicit focus on 'healthier' products, including fruits and vegetables, as well as fruit snacks and powdered teas.[29] However, it is not clear if these items must comply with specific nutrient criteria, nor whether these products are priced 'affordably.'

Beyond product pricing, Robinsons Supermarket reports that it runs two promotion- and loyalty -based campaigns to incentivize purchases of healthier products: 1) "special promotions" to encourage milk consumption around World Milk Day; and 2) the "Eat the Rainbow" campaign, in which purchases of fruits and vegetables accrue extra loyalty points and donations to DOST-FNRI throughout the month of January.[50,51] However, both initiatives are temporary.[50,51]

Evidence of a permanent programme to incentivize healthier purchases was not found for any of the three retailers. The results of ATNi's independent analysis of the healthiness of the products that retailers promote—specifically, how frequently 'healthier' versus 'unhealthy' products are promoted in their flyers and on e-commerce sites—are presented in Chapter 6.

RESPONSIBLE MARKETING

Regarding in-store marketing and product positioning, only Robinsons Supermarket was found to have an initiative in place, grouping products that qualify to carry the 'Green Tag' logo (see explanation in following subsection) in a dedicated 'Health & Wellness' section in each of its stores.51 No further information was found for any of the retailers, such as policies or initiatives addressing in-store product placement, shelf-space allocation, or promotional techniques (beyond pricing) to encourage healthier choices or increase fruit and vegetable sales.

None of the three retailers have published any form of codified commitment or policy on the responsible marketing of products to children, including restrictions on marketing unhealthy products.

BOX 9
POLICY: RESTRICTIONS ON THE MARKETING OF UNHEALTHY PRODUCTS

The Philippines does not currently have national-level regulations restricting the marketing of unhealthy food and beverages. However, the Philippine Development Plan 2023-2028 proposes prohibiting the sale, promotion, marketing, or advertising of unhealthy foods or junk foods and sugar drinks within 100 meters of school premises, which may affect retail operations if implemented.[55] No other regulations or voluntary industry initiatives were identified that aim to restrict the marketing of unhealthy products to children.

RESPONSIBLE LABELLING

Only Robinsons Supermarket was found to have an initiative in place to assist consumers in identifying healthier products. In 2017, the retailer introduced the 'Green Tag Evaluation System,' developed in partnership with DOST-FNRI, to identify healthier products.[51] Products earn a 'Green Tag' if they meet at least three out of eight nutrition claims criteria according to the Codex Alimentarius, such as 'low calorie' or 'sugar free.'[56]

While this is a positive step, it should be noted that products are not required to meet maximum thresholds for each of the nutrients of concern to be classified as 'healthier,' since each nutrient threshold is optional. This means that products with high levels of specific nutrients of concern like sugar or sodium could, in theory, be advertised as 'healthy.'

The retailer's website states that this is part of a wider '4-colour tag system,' though no clear explanation on how products fall into each category was found.[51]

BOX 10

POLICY: MANDATORY AND VOLUNTARY NUTRITION LABELLING

The Philippines requires products to display a nutrition facts table on the back-of-pack, as well as energy as percentage of guideline daily amounts on a voluntary basis. However, the country does not have a mandatory FOP labelling system in place.[57] In recent years, multiple bills have been proposed, including for the introduction of a Traffic Light scheme (2022), Health Star Rating, and Warning labels (2024), although none have been adopted.[58] With the development of the PNPM, it is hoped this willserve as the foundation of a FOP labelling policy in the coming years.[54]

MISSED OPPORTUNITIES FOR NUTRITION LEADERSHIP

The limited engagement with nutrition among the Philippines' leading grocery retailers has significant implications for the country's food environment. Modern grocery retail is expanding rapidly and increasingly shaping what, where, and how consumers purchase food. As these retailers extend their reach and influence product availability, pricing, and promotion, their lack of structured commitments to nutrition risks reinforcing an environment dominated by highly processed and nutrient-poor products.

Without clear nutrition strategies, sales targets, or policies to improve the relative availability and affordability of healthier foods over less healthy products, retailers are missing a critical opportunity to demonstrate shared responsibility and contribute to national nutrition and health goals.

PRODUCT PROFILES

Retailers play a key role in shaping food environments through their private-label portfolios, which influences what consumers can access and afford. ATNi's Retailer Assessment 2025 includes a Product Profile assessment that objectively evaluates the nutritional quality of packaged private-label foods and non-alcoholic beverages sold by the selected grocery retailers.

Applied consistently across the six countries included in the wider assessment, the Product Profile uses the same internationally recognized NPMs, similar to ATNi's assessments of manufacturer brands. This approach enables comparisons and highlights opportunities for reformulation, product innovation, and diversification within national retail landscapes.

This chapter presents the results for the Philippines, focusing on the nutritional quality of the private-label portfolios of three of the largest grocery retailers: Puregold, SM Supermarket, and Robinsons Supermarket. The results for the Philippines and all other countries included in the assessment can also be found in ATNi's interactive dashboard.

SCOPE AND METHODS

The Product Profile assesses the private-label portfolios using standardized per 100g/mL nutrient data from Innova Market Insights. All companies were invited to review and verify the dataset; however, no feedback was received. Products were screened for duplicates, implausible values, and missing key nutrients. Fresh produce, plain coffee/tea, spices, baby food, alcohol, and supplements were excluded.

Compared to other countries included in the Retail Assessment, the number of private-label packaged products available per retailer in the Philippines is lower. A recent external market report cites approximately 300 products for SM Markets, 200 for Puregold Price Club, and 400 for Robinsons Retail.[29] In addition, the exclusion of categories such as condiments and spices, missing or incomplete nutritional information on product labels, and more limited data coverage in emerging retail markets captured by Innova Market Insights further reduced the number of products that could be analyzed.

Results are presented as unweighted averages, as category-specific F&B sales data for retailers were unavailable. Further details on data sources, categorization, proxy assumptions, and quality-control procedures are available in the full methodology.

BOX 11
OVERVIEW OF NUTRIENT PROFILE MODELS AND APPROACHES

Healthiness was evaluated using five internationally recognized NPMs and approaches:

- **Health Star Rating (HSR) (2020):** A front-of-pack labelling system developed in Australia and New Zealand that assesses nutrients of concern and positive food components per 100g or 100mL acrosssix categories. Scores are converted to a 5-star scale; products scoring ≥3.5 are classified as 'healthier.' The ≥3.5 threshold is based on work commissioned by the New South Wales Ministry of Health in Australia, which concluded that "healthy core foods with a HSR of ≥3.5 can be confidently promoted in public settings as healthier choices."[59]
- **Nutri-Score (2023):** A European front-of-pack labelling system that evaluates nutrients of concern and positive food components per 100g or 100mL across five product groups. Products are classified using a five-colour letter grade from A (healthiest) to E (least healthy). As no universal 'healthier' threshold exists, results are shown for products rated A+B and A+B+C.
- **WHO South East Asia Regional Office (SEARO) NPM (2016):** Developed to guide restrictions on marketing unhealthy foods to children. Includes 25 food categories, each with nutrient-based criteria and thresholds. Product must not exceed any threshold per 100g/mL basis. Results are expressed on a binary basis i.e. 'marketing permitted' or 'marketing not permitted.'
- **WHO Western Pacific Regional Office (WPRO) NPM (2016):** Similar to WHO SEARO, but with 21 food categories, and region-specific nutrient-based criteria and thresholds. It also uses the same binary classification approach as SEARO.
- **HFSS and/or colours/flavours/NSS approach (2024):** Flags products high in nutrients of concern (HFSS; high in added saturated fat, sodium, and sugar) and/or that contain any of the three UPF markers, namely: colours, flavours, and/or non-nutritive sweeteners (NNS).[60]

As currently no government-endorsed NPM exists for the Philippines, both WHO regional models were applied to support transparency and comparability. Although the Philippines falls under the WHO WPRO, the SEARO model was also included to reflect policymakers' interest.

For more detailed information on these NPMs, please see the full methodology.

KEY FINDINGS

This section provides an overview of the nutritional quality of private-label portfolios for the three retailers in the Philippines (Table 1) and compares their results with global averages across all countries included in the Retail Assessment and with manufacturer branded products in the Philippines included in ATNi's Global Index 2024.

MEAN HEALTHINESS OF RETAILERS' PRIVATE-LABEL PORTFOLIOS USING HSR

The average HSR across the three Philippine retailers (67 products) was low—2.3 out of 5 stars—with minimal variation between retailers; a mean HSR of 2.2 for SM Supermarket (15 products); and 2.4 for Robinsons Supermarket (50 products). For Puregold, only eight products were identified in the Innova database, of which two contained sufficient nutritional information to apply the NPMs. Given this limited sample, separate results for this retailer are not presented. Compared with other countries, Philippine retailers show a lower mean HSR than the overall mean HSR of 2.7 (18,652 products) across all retailers assessed in the six countries. ATNi's interactive dashboard provides a more detailed comparison of category-level results across retailers and the six countries included in the overall Retail Assessment.

PROPORTION OF PRIVATE-LABEL PORTFOLIOS CONSIDERED 'HEALTHIER' USING:

HSR

Across the three Philippine retailers, only 28% (19 out of 67 products) met the 'healthier' threshold of HSR ≥3.5, considerably lower than the overall average of 41% (7,724 out of 18,652 products) across all retailers. Robinsons had a slightly higher proportion of 'healthier' private-label products (32%) compared with SM Supermarket (20%).

Nutri-Score

Results based on Nutri-Score reveal a similar pattern for both retailers. Because Nutri-Score was not originally designed as a binary measure, both threshold approaches are presented for transparency:

- A+B threshold: 12% of SM Supermarket products and 12% of Robinsons Supermarket private label products meet this definition of 'healthier.'
- A+B+C threshold: 35% (SM Supermarket) and 35% (Robinsons Supermarket).

WHO NPMs

Overall, 22% (22 out of 101 products) were eligible for marketing to children according to the SEARO model, while this was 17% (17 out of 98) for the WPRO model. SM supermarket had slightly higher proportions with 27% (6 out of 22 products) under the SEARO model and 18% (4 out of 22 products) under the WPRO model, compared with 23% (16 out of 71) and 15% (10 out of 68) from Robinsons Supermarket, respectively.

PROPORTION OF PRIVATE-LABEL PORTFOLIO CONSIDERED 'UNHEALTHY' USING:

HFSS and/or colours/flavours/NNS approach[i]

The proportion of private-label products classified as 'unhealthy' under the HFSS and/or colours/flavours/NNS approach was very high for both Philippine retailers: 94% for SM Supermarket (17 out of 18 products), 91% for Robinsons Supermarket (43 out of 47 products).[j] This is higher than the overall proportion of unhealthy products using this metric across all retailers included in the assessment—86% (15,639 out of 18,195 products). Product categories with lower levels of processing included: baked goods, juice, other hot drinks, processed fruits and vegetables.[k] All other categories were considerable high in fat, salt or sugar and/or highly processed.

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[i] This approach flags high levels of fat, salt, sugar, and/or products that contain 'cosmetic additives' such as colours, flavours, and non-nutritive sweeteners (markers of UPF).

[j] It is important to note that the analysis covers packaged food and beverages products. Fresh fruits and vegetables were excluded from the analysis. While some retailers package fresh produce items, resulting in barcoded products included in the original dataset, these were removed. NNS; nonnutritive sweeteners.

[k] Such as bread, cakes, dessert mixes, pastries, dessert pies and tarts.

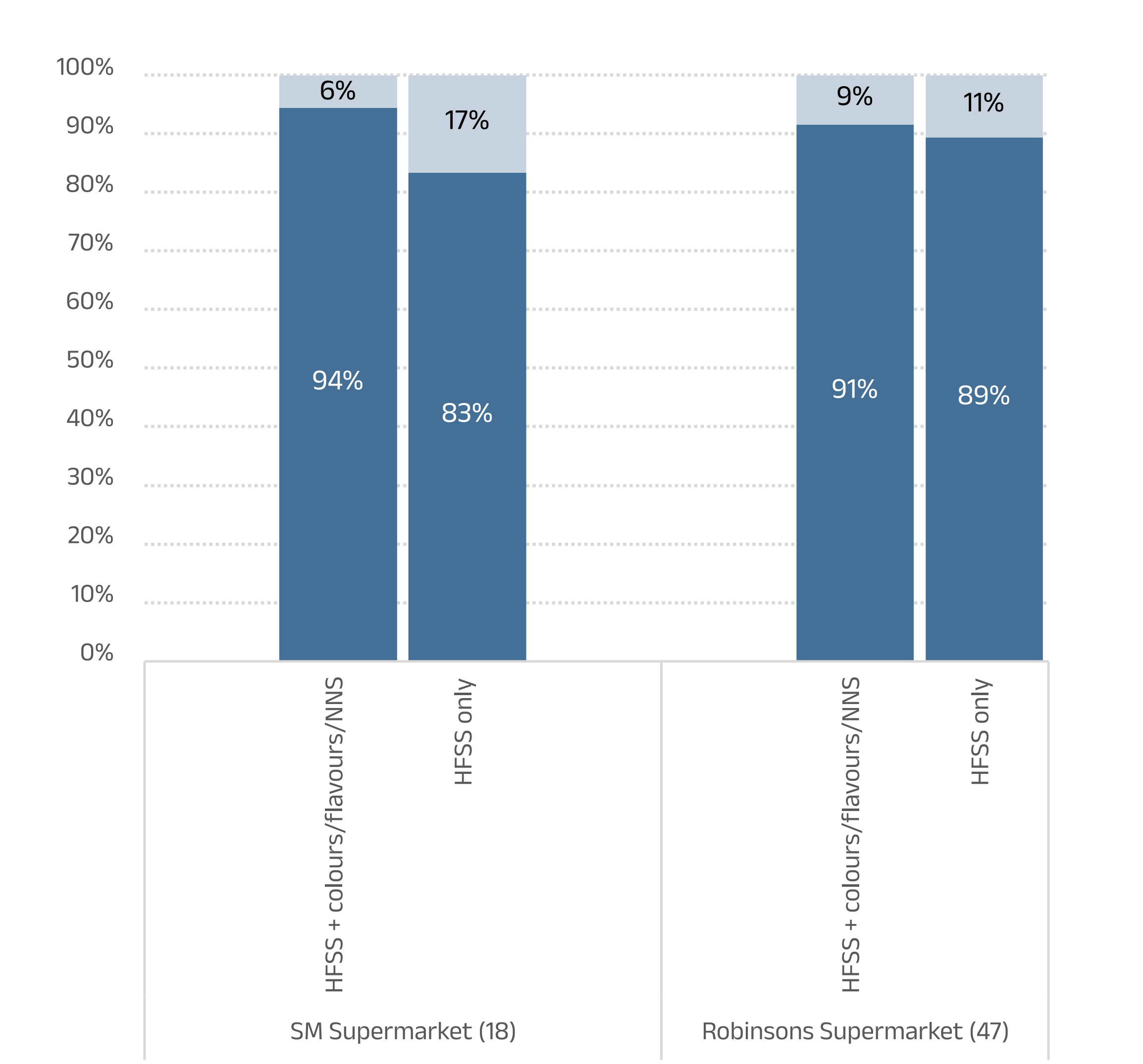
TABLE 1

PRODUCT PROFILE RESULTS ACROSS FIVE NUTRIENT PROFILING APPROACHES

	Retailer				
NPM/Approach	**Assessment criteria**	**Puregold**	**SM Supermarket**	**Robinsons Supermarket**	**The Philippines, overall**
HSR	Mean HSR	2.3	2.2	2.4	2.3
	% healthier	0%	20%	32%	28%
	Healthier products	0	3	16	19
	Total products	2	15	50	67
Nutri-Score	% healthier (A+B)	0%	12%	12%	11%
	% healthier (A+B+C)	0%	35%	35%	34%
	Healthier products (A+B)	0	2	6	8
	Healthier products (A+B+C)	0	6	18	24
	Total products	2	17	51	70
HFSS and/or colours/flavours/ NNS	% products considered unhealthy	100%	94%	91%	93%
	Unhealthy products	2	17	43	62
	Total products	2	18	47	67
WHO SEARO	% eligible products	0%	27%	23%	22%
	Eligible products	0	6	16	22
	Total products	8	22	71	101
WHO WPRO	% eligible products	38%	18%	15%	17%
	Eligible products	3	4	10	17
	Total products	8	22	68	98

FIGURE 7

PROPORTION OF TOTAL PRODUCTS CONTAINING HFSS AND/OR COLOURS, FLAVOURS, NNS (MARKERS FOR UPF PRODUCTS) FOR SM SUPERMARKET (18) AND ROBINSONS SUPERMARKET (47)



BOX 12

REFORMULATION AND THE REMOVAL OF SYNTHETIC DYES

In other countries included in the assessment, such as the United States, retailers have begun reformulating products to remove synthetic dyes amid growing awareness of their potential health impacts and their role as UPF markers. These actions reflect increasing consumer and regulatory attention to product composition and the use of cosmetic additives.

It is important to note, however, that replacing synthetic dyes with natural alternatives does not necessarily make a product healthy or healthier, nor will it change a product's classification under the HFSS and/or colours/flavours/NNS approach. This approach considers all cosmetic additives—regardless of their source (natural or synthetic)—as indicators of ultra-processing, since they modify a product's natural state without adding nutritional value. For example, low-fat yoghurts reformulated with natural colourants may score better under nutrient-based systems such as the HSR or Nutri-Score, reflecting lower energy or sugar content, yet remain classified as ultra-processed due to the continued presence of cosmetic additives and may also be classified as HFSS because of high levels of added sugar.

Together, these product profile findings highlight the importance of interpreting results across multiple models. While nutrient-based scores may improve following product reformulation, processing-based indicators will continue to account for cosmetic additives or sweeteners that remain.

COMPARING PRODUCT CATEGORIES ACROSS RETAILERS USING HSR

The analysis covers 27 product categories, revealing significant variation in nutritional quality between the categories. For example, the processed meat and seafood category had a relatively low mean HSR of 1.8 across the three retailers, while 'processed fruits and vegetables' scored higher, with a mean HSR of 3.3. Within this category, 64% of products (7 out of 11) met the 'healthier' threshold of ≥3.5 out of 5. ATNi's interactive dashboard provides a more detailed comparison of category-level results across retailers and the six countries included in the overall Retail Assessment.

COMPARING PRIVATE-LABEL WITH GLOBAL MANUFACTURER PORTFOLIOS USING HSR

At an aggregate industry level, retailers' private-label portfolios in the Philippines show a similar overall healthiness than those of leading manufacturers with a presence in the Philippines assessed in the Global Index 2024. The mean HSR for private-label portfolios across Puregold, SM Supermarket, Robinsons was 2.1 (47 products), matching the mean HSR of 2.1 (1,055 products) from 16 leading manufacturers selling F&B products in the Philippines (Table 2).

This contrasts with ATNi's overall retail assessment findings, where private-label products had a higher mean HSR (2.7) than manufacturer brands (2.4), as well as with findings from other studies. A study from New Zealand found that private-label products had a higher proportion of items with an estimated HSR ≥ 3.5 compared with branded packaged foods.[61] Similarly, an Australian study analyzing the sodium content of 15,680 private-label and branded products sold across four major supermarkets (2011–2013) reported that private-label products generally performed better than branded equivalents on sodium levels.[62]

TABLE 2

COMPARISON OF MEAN HSR BETWEEN PRIVATE-LABEL PRODUCTS AND MANUFACTURER PRODUCTS IN THE PHILIPPINES ASSESSED IN ATNi'S GLOBAL INDEX (GI) 2024

	Philippine retailers				Philippine manufacturers*			
Category	Mean HSR	% healthy products	Healthy products	Total products	GI - mean HSR	GI - % healthy products	GI- healthy products	GI - total products
Concentrates	0.7	0%	0	10	2.4	0%	0	39
Confectionery	1.8	0%	0	3	0.9	3%	7	208
Dairy	0.5	0%	0	1	3.0	59%	149	254
Edible oils	3.8	100%	2	2	1.0	0%	0	4
Ice cream	3.0	0%	0	2	2.5	4%	11	281
Juice	1.5	0%	0	4	1.9	0%	0	6
Other hot drinks	2.0	33%	1	3	1.6	0%	0	5
Rice, pasta and noodles	3.5	75%	3	4	2.8	0%	0	40
Sauces, dips and condiments	2.3	0%	0	2	1.5	12%	6	51
Savoury snacks	2.8	33%	4	12	2.2	14%	14	102
Sweet biscuits, snack bars and fruit snacks	2.2	0%	0	3	0.8	0%	0	59
Sweet spreads	4.0	100%	1	1	3.6	83%	5	6
Total	**2.1**	**23%**	**11**	**47**	**2.1**	**18%**	**192**	**1055**

* This includes 16 manufacturers featured in ATNi's Global Index 2024 that are active in the Philippines and for which the Philippines ranks among their top five markets by sales.

FORTIFICATION

Fortification in the Philippines is governed by a combination of voluntary and mandatory guidelines. Administrative Order No. 4-A s. 1995, 'Guidelines on Micronutrient Fortification of Processed Foods' encourages the fortification of widely consumed foods, particularly those consumed by at-risk populations. This includes guidance on minimum and maximum fortification levels, and labelling claims.[63]

In addition to voluntary guidelines, the Philippines also has mandatory fortification standards for: cooking oil, rice, salt, wheat flour, and refined sugar. These focus on the addition of vitamin A and iron, and the iodization of salt. An overview of mandatory fortification policies can be found in Table 3.

The Philippines also has a number of fortification logos which can be displayed on product packaging to indicate the product has been fortified (Table 4).

TABLE 3
OVERVIEW OF FORTIFICATION POLICIES IN THE PHILIPPINES

Food category	Voluntary/ Mandatory	Specified micronutrients
Cooking oil	Mandatory	Vitamin A[64]
Rice	Mandatory*	Iron[64]
Salt	Mandatory	Iodine[66]
Wheat flour	Mandatory	Iron, vitamin A[64]

* except for brown rice and local glutinous rice65

TABLE 4
OVERVIEW OF FORTIFICATION LOGOS IN THE PHILIPPINES

Label name	Description	Image
Sangkap Pinoy Seal	Applies to processed foods that are voluntarily fortified with vitamin A, iron, and iodine.	
Saktong Iodine sa Asin Seal	Applies to iodized salt products.	
Diamond Sangkap Pinoy Seal	Applies to fortified staple foods covered by mandatory fortification regulations.	

Across the three Philippine retailers, 35 private-label products were identified as applicable for fortification under national mandatory guidelines. This includes products where cooking oil, rice, salt, wheat flour, and refined sugar was either the sole ingredient, or the clearly identifiable primary ingredient. Of these, 17 eligible products were from SM Market, 16 from Robinsons Retail, and only 2 from Puregold. While the Philippines mandates fortification of all these foods, there was limited evidence on retailer and third-party websites indicating fortification for most products reviewed. As the analysis did not assess regulatory compliance and focused only on information visible on product labels or online, no firm conclusions can be drawn about whether fortification requirements were met.

In addition, many product pages did not include images of the back-of-pack, preventing the ability to check nutritional information. Products also generally did not display fortification logos on the front-of-pack. For instance, only a third of salt products were found to display the Saktong Iodine sa Asin Seal. In addition, no products were found to use the Diamond Sangkap Pinoy Seal, which applies to fortified staple foods covered by mandatory fortification regulations. While these results should be interpreted with caution due to a small sample size, these findings point to inadequate adoption of the logo, thereby limiting the visibility of fortified options in the market. Greater adoption of the logo by retailers could help raise awareness of salt iodization, as research shows that only 41% of households in the Philippines are aware of and use iodized salt.[67]

These results contribute to an under-researched area –no literature was identified online assessing the level of company adoption of the Saktong Iodine sa Asin and Diamond Sangkap Pinoy seals, while one report from 2008 identified 139 processed food products displaying the Sangkap Pinoy Seal.[65] ATNi intends to conduct larger-scale analysis on this topic in future research.

PROMOTIONS

As part of ATNi's Retail Assessment 2025, an independent analysis was conducted of F&B promotions featured in the flyers and e-commerce websites of the three grocery retailers assessed in the Philippines.

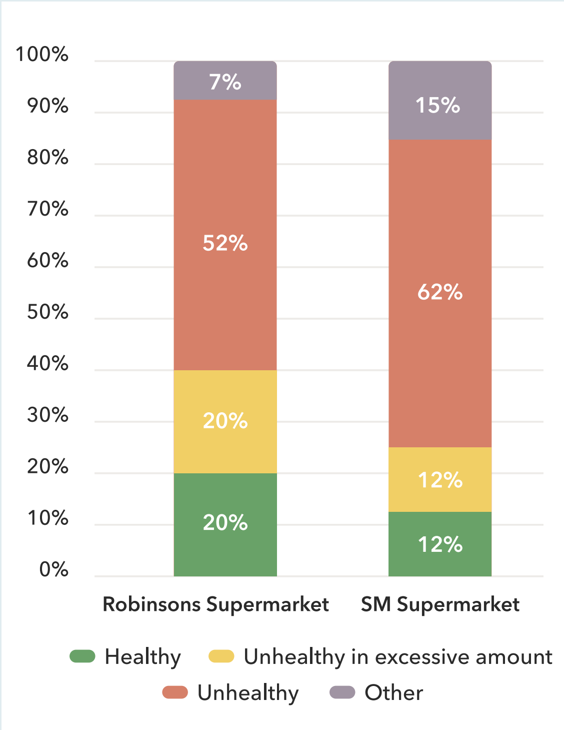
The Retailer Profile, which examined whether companies have policies or campaigns to increase the share of promotions on 'healthier' products, found that no assessed retailer has a formal, company-wide policy in place. The only notable exception was Robinsons Supermarket, which implements several time-bound promotional campaigns on healthier items at specific periods of the year.

This research component explores how frequently products classified as 'healthy,' 'unhealthy in excessive amounts', and 'unhealthy' are promoted in practice, highlighting the balance of promotional emphasis across key food categories. The categorization approach builds on the Global Diet Quality Score framework, adapted for the purposes of this assessment. Further details on the methodology and classification framework are outlined in the full methodology; a summary of the key findings for SM Supermarket and Robinsons is provided below. As neither PDF nor web-based promotional materials were available for Puregold, this retailer was excluded from the quantitative flyer analysis.

A total of 1,112 food products were analyzed from two biweekly PDFs from Robinsons and the SM Supermarket's promotional webpage. On average, Robinsons flyers featured 22 products per issue. The SM Supermarket promotional webpage yielded a total of 1068 products.

Figure 8 summarizes the proportion of promoted foods categorized as healthy, unhealthy in excessive amounts, unhealthy, and other products. Both retailers allocated one-fourth or less of their flyer space to the promotion of healthy products. Robinsons featured a higher share of healthy items (20%) than SM Supermarket (12%). In contrast, SM Supermarket promotions had a higher proportion of unhealthy foods (62%).

FIGURE 8
PROPORTION OF HEALTHY, UNHEALTHY IN EXCESSIVE AMOUNT, UNHEALTHY, AND OTHER PRODUCTS



Note: Values are rounded to the nearest point.

Table 5 presents the proportion of specific healthy food groups promoted in each flyer. Robinsons, which had a higher overall proportion of healthy foods, focused most of its healthy food promotions on fish and shellfish (11%), followed by poultry (5%), with smaller proportions of fruits (2%) and vegetables (2%). SM Supermarket displayed a similar pattern but at lower levels, e.g. fish and shellfish (6%) and vegetables (1%). Unlike Robinsons, it also promoted low-fat dairy (1%), a category absent from the Robinsons flyer during the three weeks of the assessment.

Table 6 summarizes the promotion of unhealthy food groups across the retailers. Although Robinsons had a lower overall proportion of unhealthy food promotions, it allocated a larger share to the two most promoted unhealthy categories. Refined grains, baked goods, and snacks were the most frequently promoted categories in both Robinsons (18%) and SM Supermarket (16%) flyers, followed by sweets and ice cream (12–16%). In contrast, SM Supermarket distributed its promotions more broadly across other unhealthy groups, such as processed meats (9%) and unhealthy ready meals (6%).

TABLE 5
MEAN PERCENT OF HEALTHY FOOD IN FLYERS

Healthy Food Group	SM Supermarket	Robinsons
All fruits	0.1%	2.2%
Citrus fruits	0.0%	0.0%
Deep orange fruits	0.0%	0.0%
Other fruits	0.1%	2.2%
All vegetables	1.3%	2.4%
Dark green leafy vegetables	0.0%	0.0%
Cruciferous vegetables	0.0%	0.0%
Deep orange vegetables	0.0%	0.0%
Other vegetables	1.3%	2.4%
Legumes	0.3%	0.0%
Deep orange tubers	0.0%	0.0%
Nuts and seeds	0.7%	0.0%
Whole grains	0.8%	0.0%
Fish and shellfish	6.5%	11.1%
Poultry and game meat	0.0%	4.6%
Low fat dairy	1.3%	0.0%
Eggs	0.4%	0.0%
Healthy ready meals	0.0%	0.0%
Unsweetened beverages	0.7%	0.0%

TABLE 6
MEAN PERCENT OF UNHEALTHY IN EXCESSIVE AMOUNT AND UNHEALTHY FOOD IN FLYERS

Unhealthy Food Group	SM Supermarket	Robinsons
High-fat dairy*	6.7%	11.1%
Red meat*	0.5%	4.6%
Oils and fats*	4.3%	4.6%
Processed meat	8.7%	4.8%
Sauces, dips, and condiment	8.3%	2.4%
Refined grains, baked goods, and snacks	16.3%	18.0%
Sweets and ice cream	11.8%	16.1%
Sugar-sweetened beverages	8.1%	8.9%
Juice	2.8%	2.4%
White roots and tubers	0.0%	0.0%
Purchased deep fried foods and unhealthy ready meals	5.6%	0.0%

* Foods that are unhealthy in excessive amounts.

Our findings contrast with results from a previous international study comparing the healthiness of supermarket flyers, including those from SM Supermarket, which reported no discretionary foods and classified all products as core foods.[68] This discrepancy may reflect changes over time, or differences in the categorization framework and promotional media used.

Evidence from research on other promotional strategies, such as food advertising on Philippine television, shows that exposure to unhealthy food advertisements remains higher than exposure to healthier options, particularly during children's peak viewing hours.[69] More recent surveys also indicate that supermarkets continue to be one of the main food sources for Filipino consumers, but these outlets now commonly display and sell discretionary products.[70] The top items purchased across food retail stores include bread, instant noodles, chips, and instant coffee.[70]

These patterns align with our findings, as bread, instant noodles, and chips fall under the refined grains, baked goods, and snack food groups. This suggests that supermarkets may be promoting products that are already in high demand, or conversely, that consumers are purchasing these products because they are heavily promoted by retailers.

COST AND AFFORDABILITY

The pricing analysis compares the cost and affordability of healthier versus less healthy diets across the six countries included in ATNi's Retail Assessment 2025–the US, France, Indonesia, South Africa, Kenya, and the Philippines–using a standardized food basket approach. Retail food baskets were constructed based on the EAT-Lancet Reference Diet, representing 'healthier' and 'less healthy' baskets. The full methodology, data sources, analytical framework, results, and recommendations, are available in the ATNi Retail Assessment 2025 Pricing Analysis Report**.**

For the Philippines, pricing data were available for two of the three retailers included in the overall Retail Assessment: SM Supermarket and Robinsons. Puregold, the third retailer in the country sample, could not be included because price data was not available in the VIA platform.

At both SM Supermarket and Robinsons, the healthier retail food basket was substantially more expensive than the less healthy one, mirroring the pattern observed across all nine retailers in the six assessed countries (Table 7). At SM Supermarket, the healthier basket cost PPP-adjusted USD 19.22 per person per day versus USD 13.03 for the less healthy basket, a difference of 47.5%. At Robinsons, the gap was even wider: the healthier basket cost USD 26.00 compared with USD 16.19 for the less healthy basket, meaning healthier options were 60.6% more expensive- the largest percentage difference among all retailers assessed.

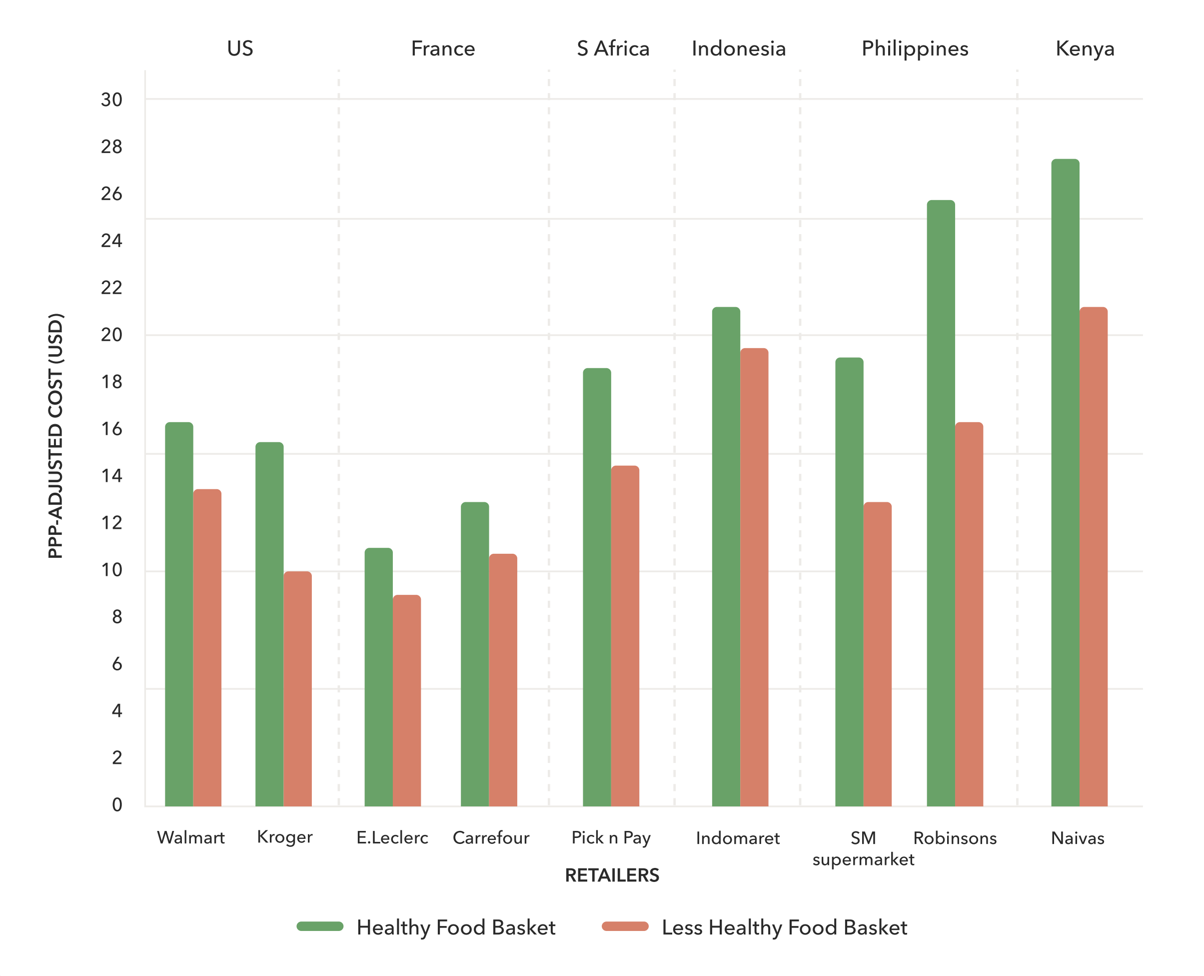
In terms of affordability, both baskets at SM Supermarket and Robinsons absorb a substantial share of average income. As a proportion of daily per capita GNI, healthier baskets required 52.6% of income at SM Supermarket and 71.2% at Robinsons, while the less healthy baskets represented 35.7% and 44.3%, respectively. When measured against daily per capita net income, the healthier baskets accounted for 31.9% (SM) and 43.2% (Robinsons), compared with 21.6% and 26.9% for the less healthy baskets.

These results show that, although the Philippines' retail baskets are less expensive in absolute PPP terms than some retailers in other lower-middle-income settings, both healthier and less healthy diets purchased through modern retail remain only marginally affordable for many households. The consistently higher cost and lower affordability of the healthier baskets point to a significant structural barrier: even where healthier products are available on supermarket shelves, they require a much greater share of household resources than their less healthy counterparts. This is likely to push price-sensitive consumers towards cheaper and less healthy options.

As in Indonesia and Kenya, the Philippine results should also be interpreted within the wider food system context. The retail baskets capture the cost of diets sourced from large formal retailers; they do not fully reflect purchasing in traditional markets and informal outlets, which remain important channels for many Filipino households. Nonetheless, the analysis underscores the scale of the challenge in making healthier diets affordable through modern retail and highlights the need for both retailers and policymakers to address pricing, promotion, and fiscal measures that can narrow the cost gap between healthier and less healthy foods.[22]

FIGURE 9

THE COST OF HEALTHIER AND LESS HEALTHY FOOD RETAIL BASKETS PER PERSON PER DAY AMONG SELECTED RETAILERS AND COUNTRIES (PPP-ADJUSTED USD, 2024)



BOX 13

POLICY: FISCAL POLICIES AFFECTING NUTRITION IN THE PHILIPPINES

The Philippines has a number of fiscal policies that influence the price of food and beverages. Most notably, since January 2018, the Philippines has a Sweetened Beverage Tax, which imposes a PHP 6 (USD 0.10) per litre tax on beverages sweetened with caloric and non-caloric sweeteners, and PHP 12 (USD 0.20) per litre on those containing high-fructose corn syrup, intending to both reduce health risks and generate revenue for health. A recent bill, introduced in September 2025 proposes increasing the tax to PHP 20 (USD 0.34) and PHP 40 (USD 0.68) respectively, and also imposing a PHP 6 (USD 0.10) tax per litre on milk (both dairy and flavoured non-dairy) and sweetened coffee products.[71]

According to Republic Act No. 9994 (The Expanded Senior Citizens Act of 2010), and the 2024 revised rules senior citizens and disabled persons are entitled to a 5% discount on the sale of basic necessities and prime commodities, including food staples such as rice, bread, flour, fresh meat, fish, vegetables, milk, eggs, cooking oil, sugar among other categories. This special discount may not amount to more than a discount of PHP 125.00 (USD 2.12) per calendar week. Registered micro businesses and cooperatives are exempted from this order.[72]

TABLE 7
AFFORDABILITY OF HEALTHIER AND LESS HEALTHY RETAIL FOOD BASKETS

Income	Country	Retailer	Healthier retail food basket		Less healthy retail food basket	
			% daily per capita GNI	% daily per capita net income	% daily per capita GNI	% daily per capita net income
Upper	US	Walmart	6.89	11.10	5.82	9.37
		Kroger	6.66	10.72	4.20	6.76
	France	E.Leclerc	6.27	8.99	5.10	7.30
		Carrefour	7.69	11.01	6.21	8.89
Upper-middle	Indonesia	Indomaret	48.90	100.10	44.16	90.38
	South Africa	Pick n pay	44.72	28.28	34.35	21.72
Lower-middle	The Philippines	SM supermarket	52.63	31.91	35.68	21.63
		Robinsons	71.19	43.16	44.32	26.87
	Kenya	Naivas	154.40	64.58	116.69	48.81

*GNI: gross national income

The findings highlight clear opportunities for retailers to address affordability gaps through more strategic pricing and promotion policies. Integrating affordability considerations into corporate nutrition strategies, setting measurable targets to narrow price differentials between healthier and less healthy products, and improving transparency in tracking progress are key priorities. Continued monitoring of cost and affordability across retailers and markets remains essential to track progress over time and inform evidence-based action. At the policy level, fiscal measures that reduce price gaps between healthier and less healthy foods remain critical to ensuring that healthier diets are accessible and affordable for all.

An update to this analysis is scheduled for early 2026, incorporating the EAT-Lancet 2025 Reference Diet and include two additional retailers from the overall Retail Assessment, for which data are currently being collected by Euromonitor International at ATNi's request.

CONCLUSION AND RECOMMENDATIONS

The Philippine Retail Assessment underscores the significant influence grocery retailers have on consumer choices and identifies clear opportunities to foster healthier, more equitable food environments. The recommendations below outline priority actions for Philippine retailers, supported by enabling measures for policymakers and investors, to accelerate progress on nutrition, transparency, and accountability across the grocery retail sector.

FOR RETAILERS

1 Strengthen nutrition governance and accountability

- Explicitly recognize consumer health and nutrition as an important material business issue within its materiality/ESG risk assessment and identify and disclose nutrition-related risks within enterprise risk disclosures.
- Integrate nutrition considerations across its commercial business, developing a comprehensive strategy to improve the retailer's impact on consumer health, with clear executive level accountability and board-level oversight.
- Link executive remuneration to measurable nutrition indicators, such as the share of private-label sales meeting 'healthier' criteria, reductions in nutrients of concern, or increases in the proportion of promotions featuring healthier products.
- Report publicly and annually on nutrition governance and progress, with disclosures disaggregated by operating brand.

2 Set measurable targets and report transparently

- Establish specific, time-bound targets to increase the share of 'healthier' private-label sales, using a government-endorsed or internationally recognized NPM—such as the WHO SEARO, WPRO model, or the HSR.
- Report annually on the share of 'healthier' private-label sales, ideally following ATNi's proposed NPM reporting guidelines.

3 Improve portfolio composition through reformulation

- Strengthen the nutritional quality of private-label portfolios through product innovation and reformulation, ensuring a higher proportion of products meet 'healthier' thresholds.
- Set specific reformulation targets for reducing sodium, sugars, and saturated fat in high-volume private-label categories—particularly those identified as less healthy in the Product Profile (e.g. savoury snacks and processed meat and seafood).
- Reduce the use of unnecessary additives and increase the availability of more minimally processed options within their private-label assortments.
- Collaborate with suppliers to improve the nutritional quality of branded products by encouraging reformulation and innovation through shared targets, incentives, and transparent monitoring of progress.

4. **Rebalance promotions toward healthier products**

- Set measurable targets to increase the share of flyer and e-commerce promotions and loyalty incentives featuring healthier products.
- Track and publicly report the annual distribution of promotions by product healthiness, ensuring clarity and transparency on definitions and methodology.
- Enhance in-store and online shopping environments to promote healthier choices through strategic product placement, shelf positioning, and distribution, ensuring healthier options are visible, accessible, and attractively presented across all store formats.

5. **Strengthen responsible marketing, particularly to children**

- Adopt a responsible marketing policy that prohibits marketing products that do not meet nutrition standards to children under 18 years across all marketing channels and techniques, in line with WHO and United Nations Children's Fund (UNICEF) recommendations, and assess compliance through independent third-party audits.

6. **Address affordability gaps**

- Integrate affordability into the company's nutrition strategy by setting measurable targets and adopting clear definitions of both 'affordability' and 'healthy', reporting on progress annually.
- Implement targeted strategies to narrow price gaps between healthier and less healthy products, including more affordable private-label options, offering discounts on produce, and designing loyalty incentives that encourage healthier purchases.

FOR POLICYMAKERS

A policy brief is published separately including more details.

1. **Finalize the national NPM, based on the PAHO NPM.**

- Use the national NPM to guide policies on food marketing, front-of-pack labelling, product reformulation, and health-related taxes.
- Set requirements for companies to report on the percentage of their portfolio that is healthy, according to the national NPM, as part of incoming sustainability reporting laws for publicly listed companies.
- For example, the UK government has Mandatory Reporting on Healthiness to require companies to report on their revenues from healthy products. Introducing similar reporting requirements can ensure companies, including retailers are held responsible for their impact on public health.

2. **Introduce mandatory front-of-pack labelling**

- While the DOST-FNRI 'green tag' system developed in partnership with Robinsons Retail is encouraging, a uniform, government-endorsed national labelling system would ensure comparability across retailers.
- The label should be interpretative (providing an evaluative judgement of healthiness, using symbols and/or colours), and either signpost less healthy products, such as warning labels, or both less healthy and healthier products, such as Traffic Light, Health Star Rating, and Nutri-Score style labels.
- For optimal effect, the label should be mandatory.

FOR INVESTORS

1 Use ATNi's data and the Investor Expectations on Nutrition, Diets and Health to integrate nutrition into sustainable investment strategies, enabling investors to

- Assess the extent to which retailers are exposed to nutrition-related risks and opportunities;
- Prioritize investments in retailers expanding access to healthy food; and
- Identify opportunities for investments in new technologies and innovations that deliver healthier foods to consumers.

2 Regularly engage with retailers to encourage them to:

- Publicly set and report against timebound targets to drive portfolio healthiness, using internationally recognized NPMs using the recently developed Reporting Guidelines, and in the near future using the government-endorsed NPM (currently under development).
- Use promotional techniques to drive sales of healthier products relative to less healthy products, and ensure only healthier products are marketed to children;
- Assign executive-level oversight and accountability for nutrition, including linking executive remuneration to nutrition Key Performance Indicators; and
- Address affordability gaps between healthy and less healthy products, particularly for low-income consumers.

3 Engage policymakers and standards-setters to create enabling environments that:

- Drive investments towards shaping healthier food environments;
- Expand healthy food retail in low-income settings; and
- Foster transparent and standardized reporting by food retailers on nutrition.

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