KENYA RETAIL POLICY BRIEF
2026

TOWARDS HEALTHIER FOOD ENVIRONMENTS:

REGULATING KENYA'S FOOD RETAIL SECTOR

ATNi
NUTRITION
MARKETS
IMPACT

KEY MESSAGES

1. Kenya faces complex nutritional challenges, with increasing rates of both undernourishment and overweight and obesity, alongside rising diet-related non-communicable diseases (NCDs). These trends place a financial strain on affected households, the national healthcare system, and the broader economy.

2. Modern grocery retail has been one of the fastest growing sectors of the Kenyan economy over the last decade. This expansion is contributing to increased access to ultra-processed foods, which are often high in fat, salt and sugar, and low in micronutrients. According to the Kenya Nutrient Profile Model (KNPM), the majority (87%) of modern retailers' private-label products are classified as unhealthy.

3. Consumers are actively being pushed towards less healthy products. Retailers' promotions prioritize less healthy products, allocating more than three-quarters of promotional space to these items.

INTRODUCTION

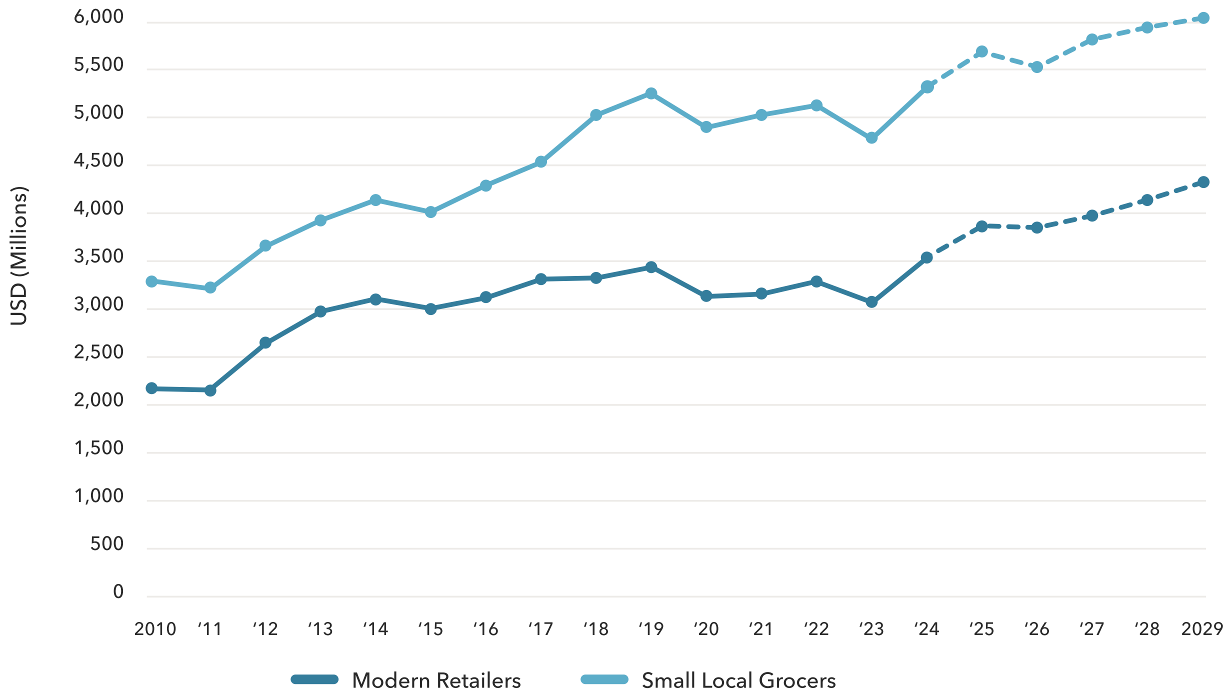
Kenya faces a complex nutritional landscape, simultaneously experiencing increasing rates of undernourishment, rising levels of overweight and obesity, and a continued prevalence of micronutrient deficiencies, especially among women and children. Most Kenyans have insufficient intake of healthier foods such as vegetables, fruits, pulses, and nuts. Traditional foods and diets are increasingly being displaced by foods of minimal nutritional value, including sugar-sweetened beverages and deep-fried foods.[1,2]

While the majority of Kenyans still purchase their food from traditional markets, modern retail formats such as supermarkets, hypermarkets, and convenience stores are projected to increase their market share, with a forecast compound annual growth rate (CAGR) of 4.0% over the next five years (Figure 1).

This trend is driven by multiple factors, including urbanization, rising disposable incomes, and consumer preferences for convenience and quality.[3,4] Although modern retail offers potential benefits, such as wider variety of goods, this expansion also comes at the cost of increased availability of ultra-processed foods (UPFs). Research indicates that modern formal retail has become a primary source of processed packaged foods, with studies suggesting that approximately half of supermarket food purchases consist of ultra-processed foods.[5,6]

The Kenyan government is playing a leading role on the African continent in advancing policies to create healthier food environments, supported by a strengthened nutrition policy framework. This includes the Kenya Nutrition Action Plan (KNAP), the Kenya Nutrient Profile Model (KNPM), and proposed policies on front-of-pack warning labels, marketing restrictions, and fiscal measures. Ensuring the timely implementation of these policies should remain a key priority.

FIGURE 1
HISTORICAL AND PROJECTED SALES GROWTH OF KENYA'S MODERN AND TRADITIONAL GROCERY RETAIL SALES.



ABOUT ATNi'S RETAIL ASSESSMENT 2025

The Kenya Retail Assessment was carried out by ATNi, a global foundation that actively challenges the food industry, investors, and policymakers to shape healthier food systems.

ATNi's Kenya Retail Assessment highlights the role of Kenya's largest modern retailers—Naivas, Quickmart, and Carrefour Kenya— which together represent an estimated 39% share of the modern grocery retail market. The assessment examines their nutrition strategies and commitments, the healthiness of their private-label products, promotional practices, and the affordability of healthy and less healthy food baskets.

For more information about ATNi, visit our website. Find more details about the research findings that this policy brief is based on here.

ATNI'S KENYAN RETAIL ASSESSMENT FINDINGS

Most private-label products sold by leading retailers will need to carry warning labels

Based on an analysis of 232 private-label products from three leading Kenyan retailers—Naivas, Quickmart and Carrefour Kenya—only 13% pass the KNPM (Figure 2). This indicates that 87% of these products would be required to display one or more warning labels, showing the product is high in saturated fat, salt and sugar. This pattern is consistent with findings from the East Africa Market Assessment 2025, which reported that only 10% of 840 products sold in Kenya by multinational and national food manufacturers pass the KNPM (Figure 3).

FIGURE 2
PERCENTAGE OF PRIVATE-LABEL PRODUCTS FROM NAIVAS, QUICKMART, AND CARREFOUR KENYA THAT PASS THE KNPM

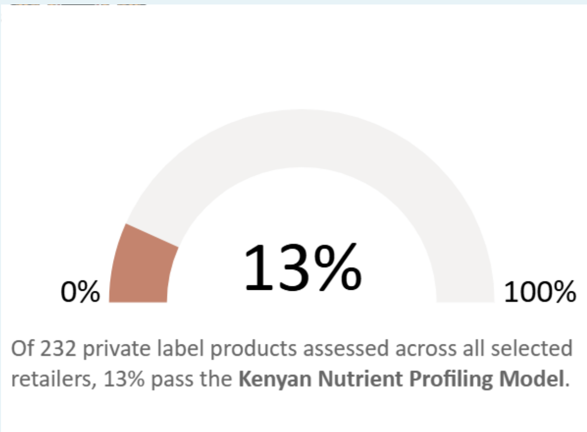
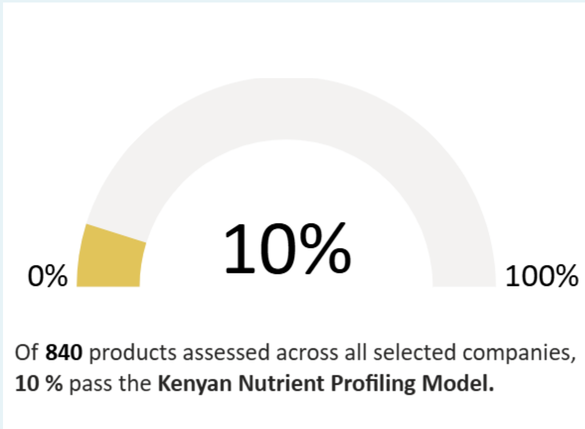


FIGURE 3
PERCENTAGE OF MANUFACTURER-BRANDED PRODUCTS THAT PASS THE KNPM

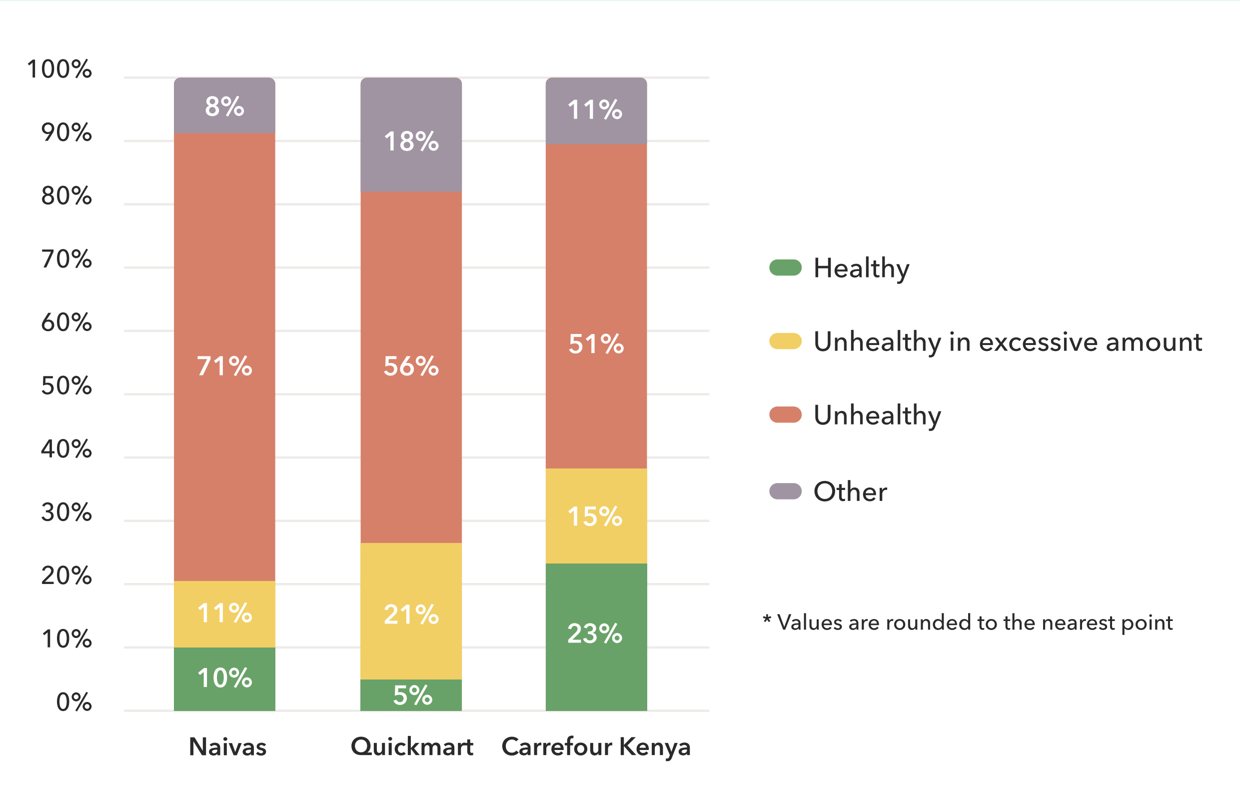


Retailers are not actively supporting healthier food choices

Retailers' promotions are substantially skewed toward less healthy options. ATNi's analysis of products featured in flyers and online promotions at the three selected retailers found that Kenyan retailers allocate less than one-quarter of their flyer space to promoting healthy products. In addition, ATNi did not find evidence that retailers had made voluntary commitments to support healthier in-store environments (e.g. limiting end-of-aisle promotions) or to restrict children's exposure to the marketing of unhealthy foods.

FIGURE 4

PROPORTION OF FLYER SPACE GIVEN TO PROMOTION OF HEALTHY, UNHEALTHY IN EXCESSIVE AMOUNTS AND OTHER PRODUCTS



RECOMMENDATIONS TO POLICYMAKERS

Kenya is well placed to address current nutrition challenges and is a frontrunner on the African continent in developing policies to create healthier food environments. The country has a robust nutrition policy framework guided by the KNAP. Recent progress includes the release of the KNPM, alongside proposed plans for mandatory front-of-pack warning labels and marketing regulations limiting children's exposure to the marketing of unhealthy foods.

However, further action is needed. Tackling these challenges will require coordinated efforts across key government stakeholders, including the Ministry of Health (MoH), Ministry of Agriculture and Livestock Development (MoALD), the National Treasury, the Ministry of Trade (MoT), and the Kenya Bureau of Standards (KEBS). Regional trade bodies, such as the East African Community, may also play an important role, particularly in supporting regional harmonization of measures such as front-of-pack warning labels.

PRIORITY ASKS

1. **Restrict marketing and price promotions of unhealthy foods.** Identify unhealthy foods using the KNPM. Define children as persons under 18 years of age, in line with WHO and UNICEF recommendations. Regulations should cover all advertising formats, including television, digital platforms, and outdoor media.

2. **Enact and implement mandatory front-of-pack warning labels.** Evidence shows that mandatory warning labels can shift consumer behaviour and incentivise manufacturers to reformulate products to reduce nutrients of concern.
In Chile, the introduction of mandatory warning labels was associated with reductions in the purchase of products high in sugar (-37%), sodium (-22%) and saturated fat (-22%). Studies also found no overall increase in food prices or loss of wages, as companies reformulated products and consumers prioritized purchasing healthier options.[7]

During implementation, review existing regulations to ensure alignment between warning labels and 'healthy' labels with the KNPM. For example, products carrying a warning label should not be eligible to display a healthy claim.

CALL TO ACTION

Malnutrition is a complex challenge requiring a multifaceted government response, including restrictions on the marketing of unhealthy foods and mandatory front-of-pack labelling. These measures can help ensure that unhealthy options are less heavily promoted, more clearly signposted, and less appealing to consumers.
Taking action would represent a win-win for both public health and the economy. Halting the rise of overweight and obesity could save an estimated USD 755 million in healthcare costs by 2044, equivalent to approximately 16% of Kenya's annual healthcare expenditure.[8]

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