KENYA RETAIL ASSESSMENT 2026

Country Report

ATNi NUTRITION MARKETS IMPACT

KENYA RETAIL ASSESSMENT 2026

TABLE OF CONTENTS

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 work 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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DISCLAIMER

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ACRONYMS

AFD	Agence Française de Développement
ATNi	Access to Nutrition initiative
CAGR	Compound annual growth rate
DFI	Development Finance Institution (development bank)
ESG	Environmental, Social, and Governance
FAO	Food and Agriculture Organization of the United Nations
F&B	Food and beverage
FOP	Front-of-pack
GNI	Gross National Income
HFSS	High in fat, sugar, and salt
HHI	Herfindahl-Hirschman Index
HSR	Health Star Rating
IFC	International Finance Corporation (World Bank's private sector arm)
KDHS	Kenya Demographic and Health Survey
KIHBS	Kenya Integrated Household Budget Survey
KNAP	Kenya Nutrition Action Plan
MAF	Majid Al Futtaim
NNS	Non-nutritive sweeteners
NPM	Nutrient Profile Model
OeEB	Austrian Development Bank
SSB	Sugar-sweetened beverage
UNICEF	United Nations Children’s Fund
UPF	Ultra-processed food
US	United States
USD	United States Dollar
WHO	World Health Organization

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 400m², 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 2,500m² 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.

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 2,500m². 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.

SUMMARY

PURPOSE AND SCOPE

ATNi's Kenya Retail Assessment 2025–2026 evaluates how leading Kenyan food retailers influence access to nutritious and affordable foods through their policies, commitments, and actual performance. It examines what retailers state they aim to achieve through their nutrition strategies, targets, and governance, and compares this with independent assessments of how they act in practice—based on analysis of their product portfolios, promotional activities, and the pricing of 'retail' food baskets.

The findings provide a picture of how modern retailers shape food environments and highlight opportunities to enhance their role in promoting healthier and more equitable diets. For Kenya, the analysis focuses on three of the country's largest grocery retailers: Naivas (18–20% market share), Quickmart (9–11%), and Carrefour Kenya (parent company: Majid Al Futtaim) (8–10%). This piece of work complements the 2025 East Africa Market Assessment of multinational and national food manufacturers and the nutritional quality of packaged foods and beverages they sell in Kenya.

RESEARCH METHODOLOGY

The assessment applies a harmonized methodology developed by ATNi and consistently applied across six countries representing different income settings. 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—Naivas, Quickmart, and Carrefour Kenya, estimated to cover 36–42% of the modern grocery retail market in Kenya—address nutrition within their business practices, commercial strategies, and company policies. 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 took the opportunity to review the findings and provide additional evidence.

The Product Profile assesses the nutritional quality of private-label packaged foods and beverages using (inter-)nationally recognized nutrient profile models (NPMs). In addition, product promotions through flyers and affordability are analyzed 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 Kenya 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

Kenya's grocery retail market is characterized by a large traditional and informal sector, alongside a smaller but expanding modern retail sector. Between 2010 and 2019, sales from modern outlets grew at a compound annual growth rate (CAGR) of 5.2%, with the number of supermarkets increasing from 102 to 225, and hypermarkets from 9 to 39. While market penetration remains limited—at an estimated 0.4 supermarkets per 100,000 people—and modern stores are concentrated mainly urban areas, retailers such as Naivas and Quickmart have in recent years expanded their presence into smaller towns and secondary cities.

However, available evidence indicates that modern retail outlets are more likely than informal vendors to sell processed and ultra-processed foods (UPF), and less likely to serve as common sources of fresh and unprocessed foods. This mixed picture underscores the importance of aligning retail practices with public health objectives, particularly as modern retailers continue to expand their market presence.

RETAILER ASSESSMENT FINDINGS

Retailer Profile: Nutrition strategies and corporate commitments

Active efforts to create healthier food environments and improve consumer diets are largely absent among Kenya's largest grocery retailers. Based on an analysis of publicly available information, the two leading retailers—Naivas and Quickmart—show minimal recognition of this role and limited evidence of proactive measures to address it. Meanwhile, Carrefour Kenya demonstrates some promising steps, with its parent company articulating a clear commitment to addressing nutrition across its retail operations.

Retailer Profile: Marketing policies and consumer information

No evidence of responsible marketing policies or initiatives to shift in-store environments towards healthier choices was found for any of the selected retailers, which is unfortunately corroborated by findings from our flyer analysis showing that the majority of promotions are for unhealthy products. Additionally, none of the three retailers has published a codified commitment or policy on responsible marketing to children that restricts the marketing of unhealthy products.

With regards to labelling, only Carrefour Kenya was found to have an initiative in place to assist consumers in identifying healthier products through its 'Choose Better' label. However, the company has not published information on the criteria used for private-label products to qualify for the label.

Product Profile: Nutritional quality and levels of processing

Product coverage varied substantially across retailers. Despite additional in-store data collection using the Open Food Facts platform, only a small number of private-label products produced and marketed by retailers themselves could be assessed for Naivas and Quickmart, while a larger number of private-label products were available and included for Carrefour Kenya.

The nutritional quality of private-label products remains limited among the three retailers assessed in Kenya. Using the Kenya NPM, only 13% of 232 assessed products met the 'healthier' threshold. Private-label products sold in Kenya performed better than products by multinational and national food manufacturers sold in the same supermarkets and other formal and informal retail outlets throughout Kenya, as assessed in ATNi's 2025 Kenya Market Assessment. That assessment showed that out of 840 products produced by 30 different manufacturers, only 10% would pass Kenyan health standards as established by the Kenya NPM. In comparison, the findings of this supermarket assessment indicate an equally limited availability of healthier, less processed private-label options and underscore the value of using both nutrient- and processing-based NPMs to evaluate portfolios.

The average Health Star Rating (HSR) of private-label products was 2.9 (188 products), with 48% of products meeting the 'healthier' threshold (HSR ≥3.5), broadly comparable to the 41% six-country average (18,652 products) observed across the multi-country Retail Assessment.

Using a combined approach to identify products high in fat, sugar, and salt (HFSS) and/or containing markers of ultra-processing (colours/flavours/non-nutritive sweeteners (NNS)), most private-label products were classified as unhealthy (89%), indicating a similarly high level to the six-country average (86%).

Promotions

Promotional practices by the selected supermarkets in Kenya overwhelmingly favoured less healthy products. Carrefour Kenya featured the highest share of healthy promotions (23%), while Naivas (10%) and Quickmart (5%) allocated very limited promotional space to healthier foods. Across all three retailers, promotions were dominated by 'unhealthy' and 'unhealthy in excessive amount' categories, particularly refined grains, baked goods and snacks, sweets and ice cream, sugar-sweetened beverages (SSBs), juices, and sauces, dips and condiments. Overall, healthier food groups such as fruits, vegetables, and legumes were promoted infrequently and inconsistently, indicating that current promotional strategies continue to reinforce consumer exposure to less healthy, highly processed products.

Affordability of healthier and less healthy food baskets

For Kenya, pricing data were available only for Naivas, where the cost of a healthy retail food basket was considerably higher than the cost of a less healthy food basket. When calculating the cost as a percentage of daily per capita net income, healthier food baskets represented 64.6%, and less healthy baskets 48.8% of the daily net per capita income (KES 925.31 in 2024). Furthermore, when adjusted for purchasing power parity–Naivas had the most expensive healthier food basket in the overall retail assessment which included a total of nine retailers across six markets United States (US), France, South Africa, Indonesia, and the Philippines.

While these findings likely reflect that Naivas targets a higher-income segment of Kenyan consumers, and do not account for the fact that most consumers would buy products through other channels such as traditional markets, they nonetheless highlight that the retailer's products are unaffordable for the majority of consumers, and those who shop at the supermarket may be pulled towards cheaper, less healthy products.

CONCLUSION

While Kenyan supermarkets increasingly influence and shape the food environment in the country, they are not yet showing evidence of positively contributing to healthy diets through their policies and portfolio healthiness. Across their private-label portfolio, promotional practices for all products they sell, and affordability, current retail strategies largely favour less healthy, highly processed foods, limiting consumers' ability to make healthier choices within modern grocery environments.

As modern retailers expand into secondary cities and smaller towns, this growing influence presents a critical opportunity to more deliberately align retail practices with Kenya's national nutrition priorities and public health goals.

INTRODUCTION

RETAILERS AND THE FOOD ENVIRONMENT

While traditional and informal retailers continue to dominate daily food purchasing in Kenya, the modern grocery retail sector is expanding steadily, particularly in urban areas. To better understand its influence on public health, ATNi developed the Retail Assessment 2025–2026, which evaluates leading food retailers in Kenya and their commitments, policies, and practices related to nutrition and health. The assessment provides evidence to strengthen accountability and guide progress towards 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. Through decisions on product assortment—covering both own/private-label brands and the selection of (multi-)national manufacturers' brands—as well as pricing, placement, and promotion, food retailers shape the visibility, affordability, and desirability of different foods. As a growing share of household food baskets is purchased rather than produced, these retail decisions increasingly influence what foods are most accessible to Kenyan consumers.

Kenya faces a triple burden of malnutrition, with undernourishment and micronutrient deficiencies alongside rising consumption of ultra-processed foods (UPFs) and increasing rates of overweight and obesity. Against this backdrop, the expansion of modern grocery retailers—and their growing role in supplying packaged and processed foods—has important implications for the way the food environment is shaped and influences nutrition outcomes. Retailers are therefore increasingly challenged to consider whether their contribution supports healthier dietary patterns or reinforces existing nutrition challenges.

METHODOLOGY

ATNi's Retail Assessment 2025-2026 comprises tailored research components applied consistently across 18 retailers in six countries: the US, 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 Kenya, applying the methodology to three leading retailers: Naivas, Quickmart, and Carrefour Kenya. The analysis offers valuable insights into how major retailers shape food environments, though it is limited to three national modern retailers. 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 wider global perspective on food retail and nutrition.

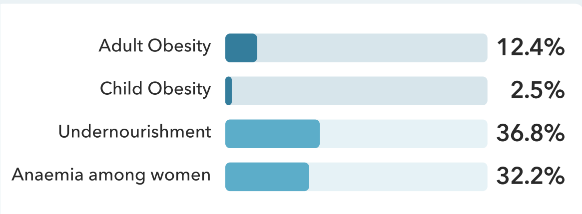
MAPPING THE RETAIL LANDSCAPE

Mapping Kenya's grocery retail environment provides essential context for interpreting the broader findings of ATNi's Retail Assessment 2025-2026. 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 food system in Kenya.

NUTRITION CONTEXT: MALNUTRITION AND DIETARY PATTERNS

The triple burden of malnutrition remains a significant public health concern in Kenya (Figure 1). Undernourishment has worsened over time, rising from 28.2% (2004–2006) to 36.8% (2021–2023), while anaemia affects 28.7% of adult women (2023).[1] Micronutrient deficiencies also remain widespread, The 2011 Kenya National Micronutrient Survey identified iron, vitamins A and B12, folate, iodine and zinc as key deficiencies, with pregnant women and young children most at risk.[2]

FIGURE 1
PREVALENCE OF MALNUTRITION IN KENYA



Source: FAO and WHO[1,3-5]

Simultaneously, adult obesity increased from 8.1% to 12.4% (2012–2022).[3,5] The burden is notably higher among women: the 2022 Kenya Demographic and Health Survey (KDHS) reports that 45% of women of reproductive age are overweight or obese, compared with 19% of men; WHO estimates suggest obesity prevalence among women is more than triple that of men.[3,5,6] Higher rates are also seen among affluent and more educated women.[6] Childhood obesity remains relatively low: only 2.5% of children and adolescents (5–19 years) were living with obesity in 2022, which is below the African regional average of 4%.[4]

These outcomes reflect shifting dietary patterns in Kenya, characterized by limited dietary diversity and rising consumption of processed and UPFs high in saturated fats, sodium, and added sugars.[6-8] Survey evidence illustrates low dietary diversity, with the 2021 Global Diet Quality Project finding that only 40% of adults consumed all five food groups typically recommended in food-based dietary guidelines.[7] National household consumption data further show insufficient intake of vegetables, fruits, pulses, nuts, and animal-source foods, alongside high intake of starchy staples, sugars, and discretionary foods—patterns that diverge substantially from the EAT-Lancet healthy reference diet.[8]

Consumption of products with limited nutritional value is also increasing. According to the 2022 KDHS, 70% of women consumed SSBs and 35% consumed other 'unhealthy' foods, with higher consumption associated with higher education levels.[6,a,b]

The Global Diet Quality Project similarly found that 22% of adults consumed soft drinks and 43% consumed deep fried foods, with higher rates among men and urban residents.[7]

This is also reflected in packaged food consumption trends (Figure 2). Packaged foods and beverages grew at a 4.2% CAGR between 2017 and 2024, reaching USD 6.51 billion (USD 115.33 per capita).[9] While UPF consumption remains relatively low, UPF categories have expanded more rapidly than the sector overall, growing at 5.5% CAGR since 2017.[9,10,c]

In 2023, UPF-category consumption was estimated at USD 36.8 per capita—only 10% of the global average and 57% of the Sub-Saharan Africa average—with UPF accounting for 31.9% of total packaged food and beverage (F&B) sales.[11]

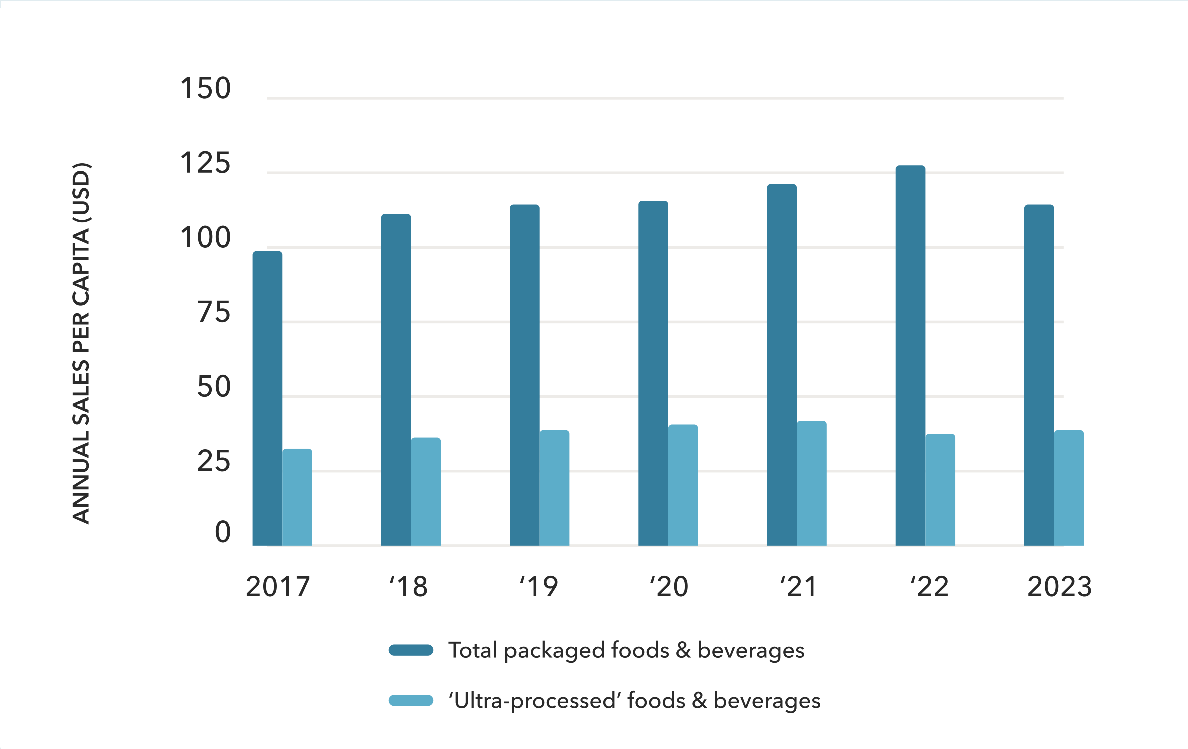
[a] Sweet beverages include fruit juice and fruit drinks, sodas drinks such as Coca-Cola, Fanta, Sprite, and energy drinks such as Red Bull, tea with sugar, coffee with sugar, Milo, cocoa, and other sweetened liquids.

[b] Unhealthy foods include sweet foods such as cakes, sweet biscuits, candies, chocolates, ice cream, or ice lollies; and fried and salty foods such as crisps, chips, ngumu, mandaazi, samosa, bhajias, or Indomie.

[c] 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."[9]

FIGURE 2

PACKAGED F&B SALES AND UPF[d] CATEGORY GROWTH IN KENYA, 2017–2023.[9]



Economic development and demographic change have accelerated Kenya's urbanization—from 17% of the population in 1990 to 30% today—shifting households towards purchasing rather than producing food.[12] In 2024, the Kenya National Bureau of Statistics estimated that urban households now purchase 98% of their food, and even in rural areas the share acquired through purchase rose from 30% (2009) to 78% (2022), increasing population-wide dependence on retail food environments.[13-15]

These shifts, combined with income instability and limited time for preparing meals at home, have contributed to greater consumption of ready-to-eat, energy-dense foods. Urban Kenyans increasingly rely on informal vendors and fast-food outlets selling fried carbohydrate-based items, alongside a growing, though still smaller, contribution from packaged foods purchased in supermarkets.[1-4] At the same time, researchers note declining access to, and preparation of, traditional vegetables, legumes, and cereals—key sources of fibre and micronutrients—for many urban households.[15-17]

BOX 1
POLICY: KENYA NUTRITION ACTION PLAN (KNAP) 2018–2022 AND 2023–2027

KNAP is a comprehensive five-year multisectoral strategy aimed at accelerating efforts to combat malnutrition across the country, led by the Ministry of Health. Although the Plan does not explicitly refer to food retailers, it recognizes the role of the broader food system and the private sector in shaping national nutrition outcomes. Retailers may therefore be indirectly affected by proposed actions related to public-private partnerships, as well as advertising, packaging, labelling, and marketing practices.

MODERN GROCERY RETAIL LANDSCAPE

The increasing availability of highly processed packaged foods in Kenya is closely linked to changes in the grocery retail environment, which shape consumer access and exposure to both healthy and less healthy products:

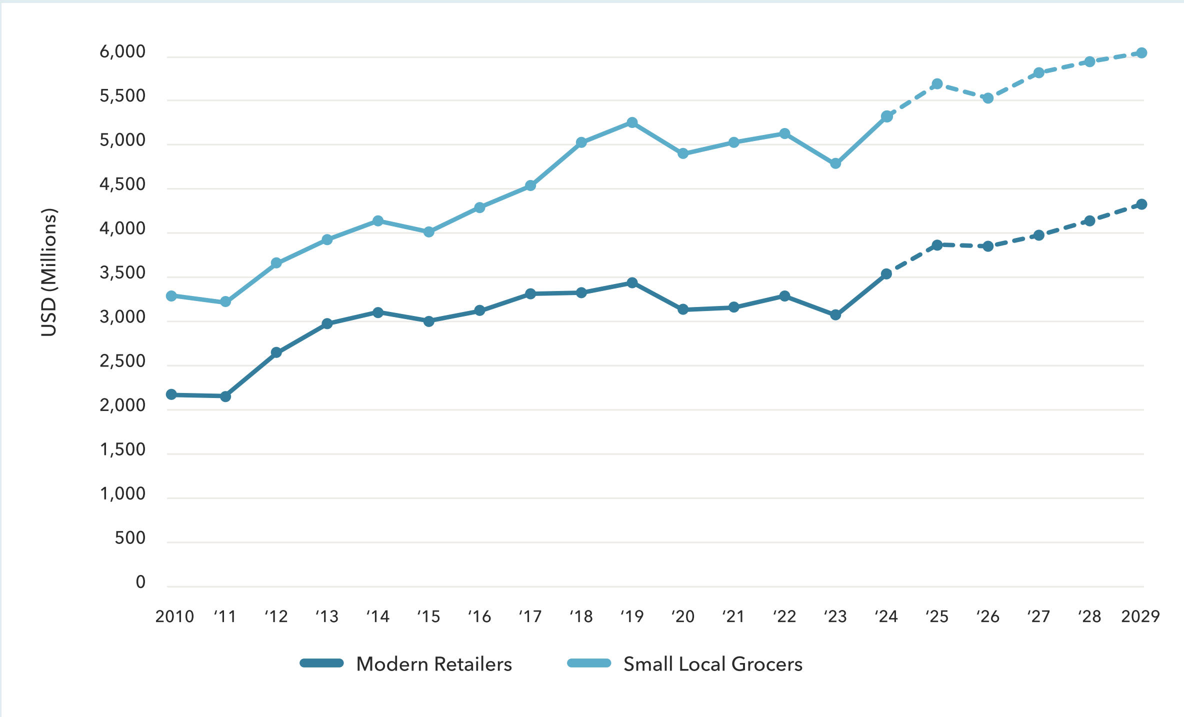
- Kenya's grocery retail sector (excluding e-commerce) is valued at USD 8.9 billion (Euromonitor, 2024), of which an estimated 40% takes place through modern retail formats.[10]
- This figure does not capture the substantial 'informal' (unregistered, non-taxpaying) traditional grocery sector—which is difficult to quantify—and includes kiosks, open-air and wet market stalls, roadside vendors (kibandas), and family-run duka stores.[18]
- Household expenditure data indicate that the true share of modern retail is substantially lower: the 2015–2016 Kenya Integrated Household Budget Survey (KIHBS) found that only 4.7% of consumer food purchases came from supermarkets, and a 2016 survey estimated the supermarket share at around 10%.[19,20]
- A 2022 Boston Consulting Group report estimates that modern retail accounts for 23% of overall retail sales in 2021, although its methodology is unclear.[21]

Despite its modest share, the modern grocery sector has expanded over the long term (Figure 3):

- Between 2010 and 2019, sales from modern outlets grew at a CAGR of 5.2%, during which the number of supermarkets rose from 102 to 225 and hypermarkets from 9 to 39.
- However, from 2014 to 2020 the sector faced significant challenges—including inflationary pressures, poor management decisions, competition from the informal sector, and COVID-19 disruptions—leading major chains such as Uchumi, Tuskys, and Nakumatt to close or exit the market.[21–24]
- As a result, the number of supermarkets fell from 226 in 2016 to 192 in 2021, and modern grocery sales contracted by 8.7% in 2020. As of early 2026 the three largest Kenyan supermarkets chains assessed by ATNi reported operating 214 modern grocery outlets:, Quickmart (66) and Carrefour Kenya (34). This indicates that the number of outlets increased substantially since 2020. While growth remained subdued immediately after the pandemic (CAGR 2.7%, 2020–2024), the modern grocery sector is projected to accelerate over the next five years with a CAGR of 4.0%, slightly outpacing the 3.3% projected for registered small local grocers.

FIGURE 3

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



Source: Euromonitor International

This anticipated growth reflects continued urbanization, rising disposable incomes, shifting preferences towards convenience and quality, and the increasingly professionalized business models of leading retailers.[21,25,26]

BOX 2
THE RISE OF MODERN GROCERY RETAIL IN KENYA

Kenya's 'supermarketization' began in the mid-1990s and expanded rapidly over the next decade and a half. In 2002, only four supermarket chains operated in the country; by 2018, this number had grown to ten.[27] By 2012, the Ministry of State for Planning identified the supermarket sector as one of the fastest growing areas of the Kenyan economy, and it is now regarded as one of the most highly developed retail sectors in Sub-Saharan Africa.[17,28] For this report, ATNi focused on the three largest modern retailers in Kenya with an estimated combined market share of 36-42%.

This growth was driven by modern retailers' ability to offer convenience, product variety, and competitive pricing that appealed to Kenya's expanding urban middle class.[29] Early supermarket success has been attributed to relatively affordable private-label ranges, the expansion of outlets into residential neighbourhoods, and the introduction of loyalty schemes.[30] Modern stores also differentiate themselves through a more formal shopping environment—featuring spacious aisles, bright lighting, and often air conditioning—compared with the strictly over-the-counter service model of kiosks.[17]

Despite this expansion, informal food retailers continue to dominate daily consumer purchasing. Their enduring importance stems from proximity, accessibility, and affordability. Kiosks, dukas, open-air stalls, and roadside vendors are located where consumers live, work, and travel, including at high-traffic transport hubs.[31-34] These outlets often offer lower prices than formal supermarkets, sell products in small, flexible quantities, and provide informal credit or barter options—features that remain essential for many low- and middle-income households.[18,29,31-34]

AVAILABILITY OF PROCESSED AND FRESH FOODS ACROSS MODERN AND TRADITIONAL RETAIL CHANNELS

Recent evidence indicates that processed and packaged foods in Kenya are more commonly sold through modern retail outlets—particularly supermarkets—than through informal vendors.[19] Fresh and unprocessed foods remain far less prominent in modern grocery retail. Fruit and vegetable products account for just 2% of supermarket shelf space—the smallest share of any category studied.[35] Consistent with this, household surveys and market analyses show that consumers typically purchase fresh fruits and vegetables, dairy, meat, fish, and other unbranded whole foods from informal retailers such as open-air markets, kiosks, and neighbourhood vendors, where these products are generally more available and affordable.[18,36-38] Informal channels therefore play a central role in supporting nutritious diets for low- and middle-income households, who depend on them for daily food purchases.[39]

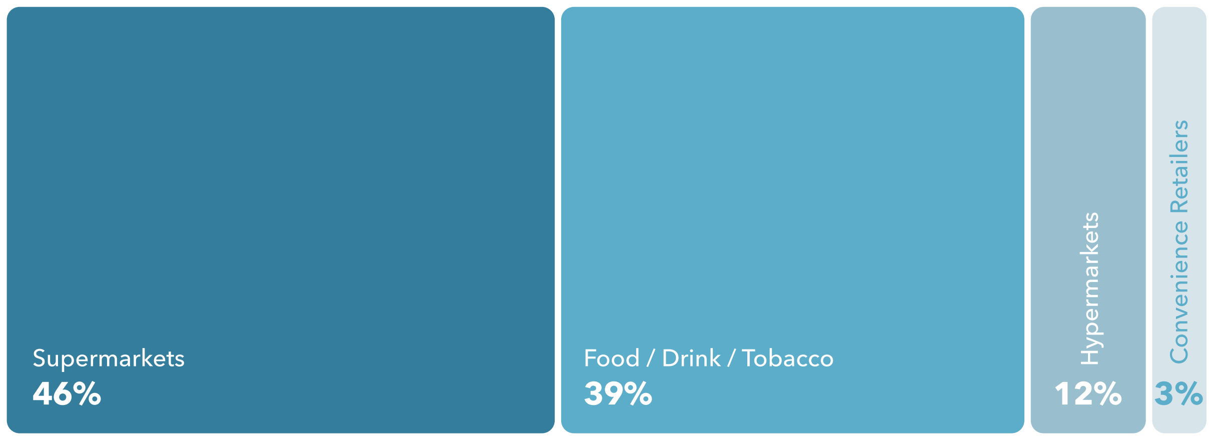
The nutritional implications of supermarket expansion are therefore mixed. Several studies have found that greater supermarket presence or purchasing is associated with higher intake of processed foods and total calories, as well as increased BMI and greater likelihood of overweight and obesity among adults—particularly women.[17,19,40,41] At the same time, other research suggests that supermarkets can improve dietary diversity by increasing access to nutrient-rich foods such as meat, fish, eggs, and fruits, contributing to reductions in childhood stunting and underweight in some areas.[42,43]

MODERN RETAIL FORMATS

As shown in Figure 4, the modern grocery retail market in Kenya consists primarily of supermarkets (46%) and Food/Drink/Tobacco Specialists (39%).[10] The proportion of hypermarkets is smaller but growing, increasing from 7% to 12% since 2017.[10] Meanwhile, convenience stores account for only 3%. Discounters and Warehouse clubs are virtually non-existent in Kenya.

The Boston Consulting Group projects that, in the coming years, grocery retailers in Kenya will continue to expand into residential areas and smaller towns, primarily through investments in smaller-format supermarkets and convenience stores.[21]

FIGURE 4
SHARE OF MODERN GROCERY MARKET BY RETAIL CHANNEL IN KENYA



Source: Euromonitor International

BOX 3
E-COMMERCE

E-commerce remains a small but rapidly expanding segment of Kenya's grocery market. Online grocery sales were valued at an estimated USD 34 million in 2024—equivalent to less than 1% of total offline grocery retail sales—but grew by 30–35% that year.[44] Online grocery purchasing was rare prior to the pandemic; however, lockdown restrictions prompted both retailers and restaurants to adopt online models and partner with delivery platforms to maintain operations.[45]

The market has continued to expand as consumers increasingly value convenience and become more familiar with digital shopping. As of 2023, an estimated 9.3% of Kenyans are ordering groceries online.[44] Looking ahead, online grocery sales are projected to grow at 19.15% annually, reaching USD 208.2 million by 2027 and involving 10.5 million consumers (16.7% of the population).[45]

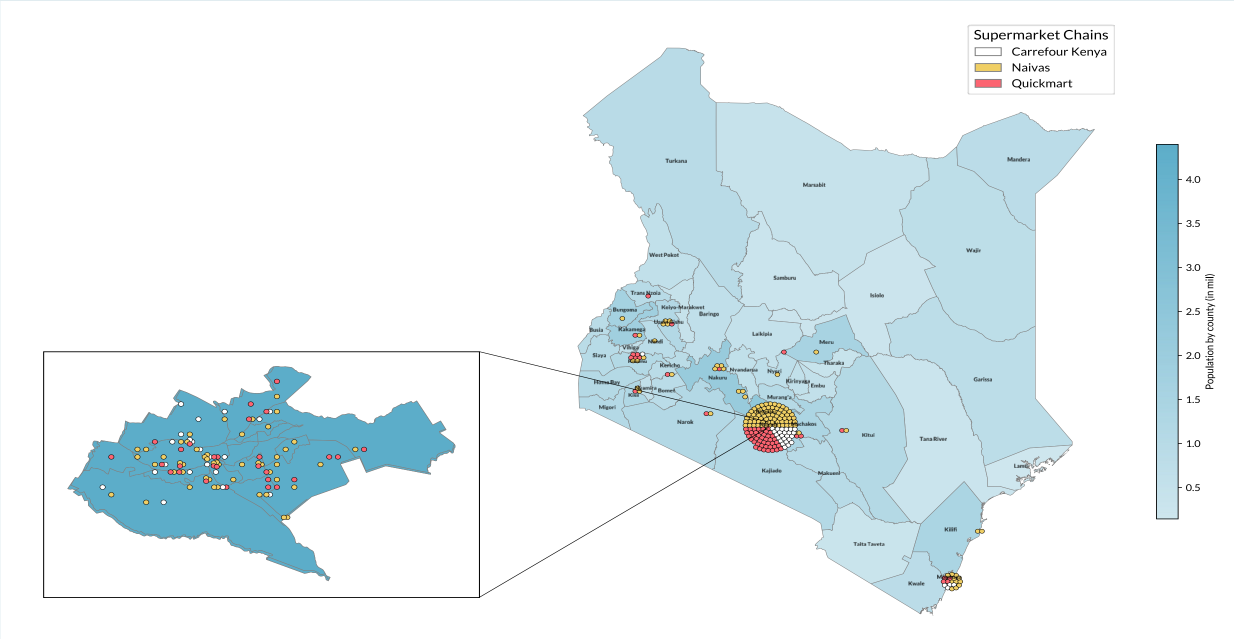
GEOGRAPHIC COVERAGE

Modern grocery retail in Kenya is highly urbanized, with supermarkets concentrated in major cities such as Nairobi, Mombasa, and Kisumu (Figure 5). Over the past decade, leading chains—notably Naivas and Quickmart—have expanded into smaller towns and secondary cities, broadening their geographic reach.[23,30,41] Despite this growth, penetration remains limited: in 2023, Kenya had an estimated 0.4 supermarkets per 100,000 people, with rural areas remaining largely underserved.[36,46] Based on the total estimated population of 55.3 million in 2023, this would amount to an estimated 221 supermarkets.

Large supermarket and hypermarket formats are typically located in shopping malls, which range in scale from small neighbourhood centres (1,900–11,600m^2) to regional destination malls (37,000–74,000m^2).[47,48] These larger malls are concentrated in major urban areas and near major transport corridors, and host chains such as Carrefour and Chandarana, which operate almost exclusively in such locations.[47] This is associated with mall footfall patterns favouring supermarkets: a 2016 online survey found that 35% of mall visitors go to the supermarket—more than any other retail category.[47]

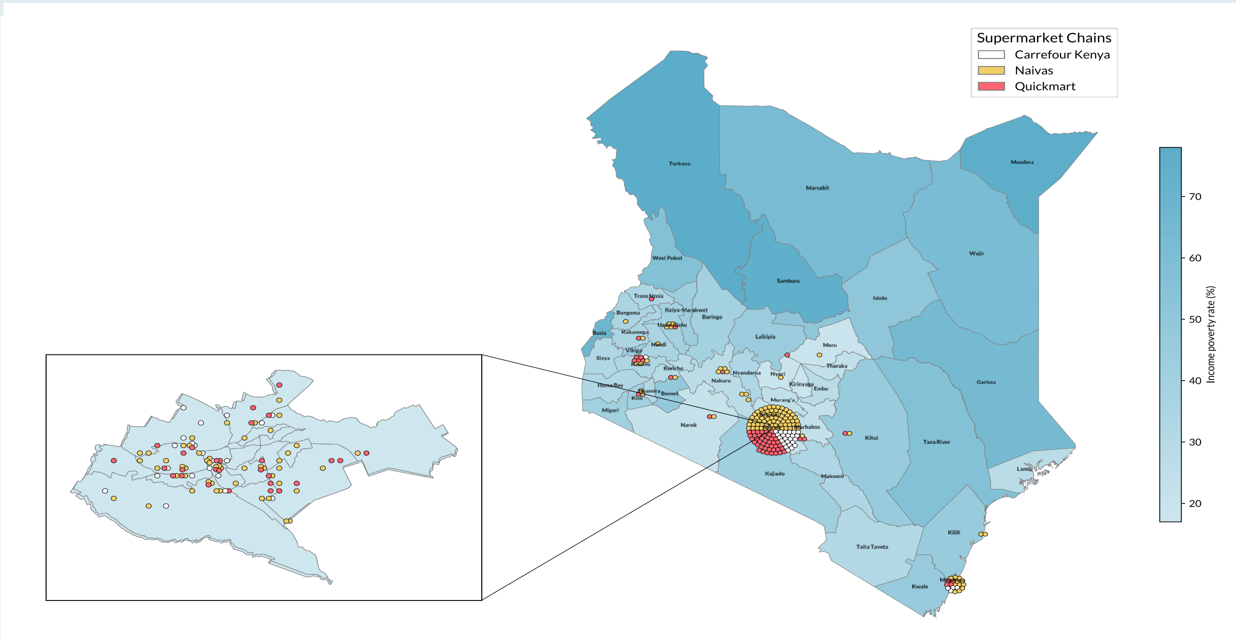
Small supermarkets are more widely distributed, commonly located along major roads, in suburban residential neighbourhoods, and in secondary cities.[23] Quickmart primarily operates in these formats, while Naivas maintains a mix of mall-based, roadside, and residential-area stores across the country.[23]

FIGURE 5
LOCATIONS OF SELECTED RETAILERS IN KENYA AND NAIROBI, OVERLAID ON A POPULATION MAP



Source: Figure compiled by ATNi; Population data sourced from UNDP GeoHub and Retailer Locations from Retailer websites and Open Street Map.

FIGURE 6
LOCATIONS OF SELECTED RETAILERS IN KENYA AND NAIROBI, OVERLAID ON A NATIONAL INCOME POVERTY MAP



Source: Figure compiled by ATNi; Poverty data sourced from UNDP GeoHub and Retailer Locations from Retailer websites and Open Street Map.

CONSUMER BEHAVIOUR AND PREFERENCES

SOCIO-ECONOMIC DIMENSIONS

There is limited recent data on the socio-economic profile of supermarket shoppers in Kenya; however, available research indicates that modern grocery retail primarily serves urban consumers with higher disposable incomes and greater mobility.[29,31,49]

SHOPPING PATTERNS AND PREFERENCES

Supermarkets are valued for their "one-stop shop" convenience, offering a wide assortment of food and non-food items, multiple brands, frozen and refrigerated products, and a range of pack sizes—features that are not typically available in informal kiosks, which offer a narrower selection and limited cold-chain capacity.[17,30] Kenya's modern grocery retailers also emphasize locally sourced products.[29,50]

Notably, supermarket visits are far less frequent than trips to informal retailers. Evidence from Kisumu (2016–2017) shows that although most consumers reported shopping at supermarkets, they typically did so only once a month, while nearly 75% sourced food from informal traders at least five days a week.[31] When consumers do visit supermarkets, they tend to make larger, periodic purchases rather than frequent small ones. A 2025 study using loyalty card data across ten supermarkets found shoppers predominantly purchase in bulk, reflecting the behaviour of higher-income consumers with the upfront resources and household storage capacity needed for larger purchases.[51]

BOX 4
THE GROWTH OF PRIVATE-LABEL BRANDS IN KENYA

Private labels played an important role in the early expansion of Kenya's supermarket sector, offering relatively affordable alternatives to national brands.[30] Recent market research indicates growing interest in private-label products among both retailers and consumers, as chains seek to differentiate themselves, strengthen customer loyalty, and compete on value.[52] Most major retailers now offer their own private-label ranges, positioned to provide lower-cost options without compromising perceived quality.[52] However, precise data on private-label sales in Kenya is not yet available.

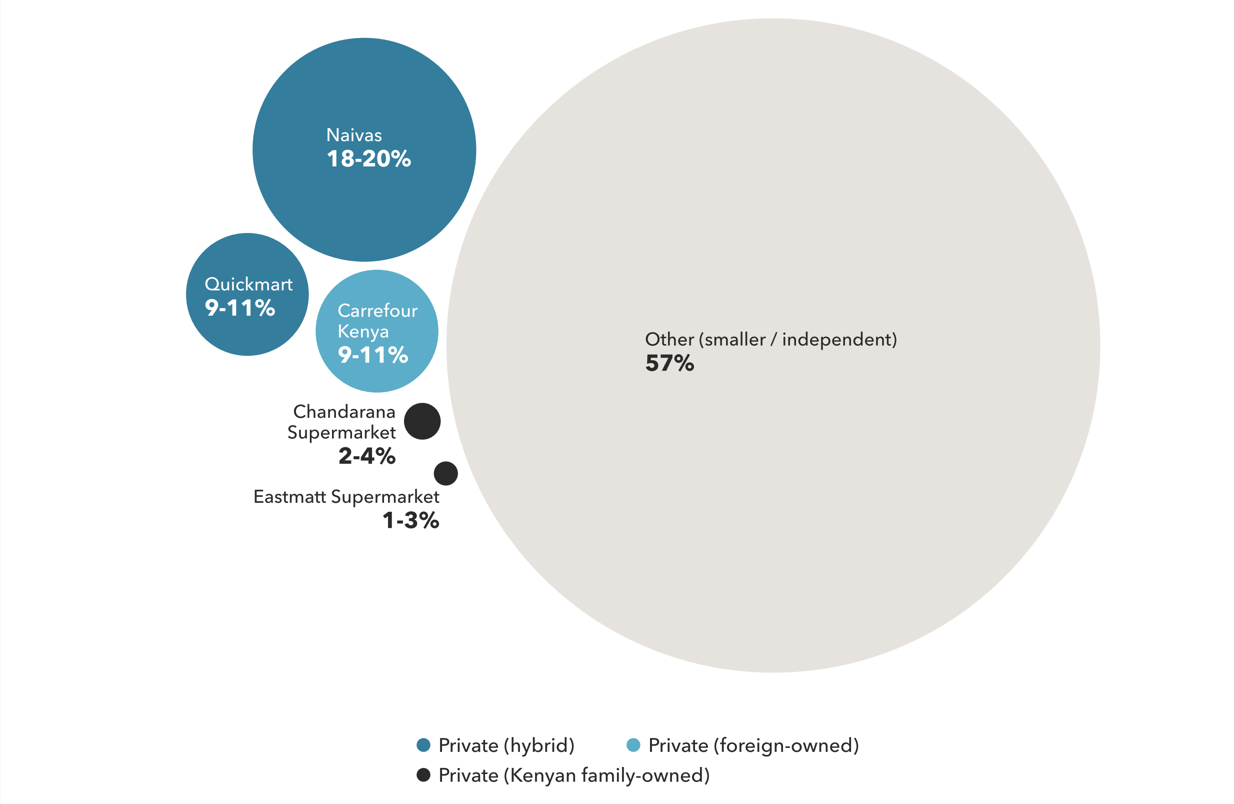
MARKET STRUCTURE & RETAILER CHARACTERISTICS

MARKET CONCENTRATION AND COMPETITION

Kenya's modern grocery retail market remains highly fragmented, with a Herfindahl-Hirschman Index (HHI) score of 571.3 (out of 10,000) in 2024.[10,d] The largest retailer, Naivas, accounts for less than 20% of modern grocery sales—despite operating more than one-third of all supermarkets in the country—while Quickmart and Carrefour each hold under 10% market share (Figure 7).[10] Euromonitor reports only two additional chains with measurable shares (Chandarana and Eastmatt, each <3%), although a 2025 study identified more than 20 supermarket chains operating nationally.[10,51] Many supermarkets are also independent or operate only a handful of outlets; collectively, these non-chain stores account for an estimated 56.7% of modern grocery sales in 2024.[10,17]

[d] 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 7
MAJOR GROCERY RETAILERS IN KENYA BY MARKET SHARE AND OWNERSHIP



Source: Euromonitor International

The competitive landscape has undergone significant shifts over the past decade. Between 2015 and 2020, six major retailers—Uchumi, Tuskys, Nakumatt, Shoprite, Game Stores, and Choppies—either exited the market or went bankrupt.[21-24,26] Their departures created substantial gaps that were rapidly filled by homegrown chains such as Naivas and Quickmart, as well as by international entrants such as Carrefour. Combined, these chains opened 72 new outlets after 2020, often taking over vacated stores from former competitors.[23,24,26,53]

Despite this expansion, the market remains unconcentrated and intensely competitive. IBL Group—Naivas's parent company—noted "increased competition from Carrefour and Quickmart" as a factor in its reduced profitability, reflecting a wider pattern in which formal retailers primarily compete with one another rather than expanding into areas dominated by traditional retail.[24]

RETAILER OWNERSHIP CHARACTERISTICS

Kenya's modern grocery retail sector is dominated by privately owned supermarket chains, with none of the major players publicly listed. In recent years, the sector has experienced a marked increase in foreign investment and ownership, primarily through private equity and development finance institutions (DFIs).

Naivas Limited illustrates this trend. Since 2020, Naivas International has attracted international investors associated with strong environmental, social, and governance (ESG) and human rights standards. However, this involvement appears to have missed an opportunity to embed a stronger focus on health and nutrition outcomes within the Kenyan operations of Naivas. In 2020, France-based private equity firm Amethis acquired a 30% minority stake alongside DEG (a subsidiary of the German KfW Group), MCB Equity Fund, and the International Finance Corporation (IFC), a member of the World Bank Group. In 2022, this stake was sold to a consortium led by the IBL Group (Mauritius) through its investment vehicle Mambo Retail, which now holds a 51% controlling stake. This acquisition was supported by Proparco, a subsidiary of Agence Française de Développement (AFD), and DEG.[54]

Quickmart has similarly undergone a shift towards foreign private equity ownership. In 2019, the Mauritius-based firm Adenia Partners became the majority owner through Sokoni Retail Kenya as part of its acquisition of Tumaimi Supermarkets, while the founding Kinuthia family retained a minority stake. Adenia positions itself as a responsible investor focused on driving positive impact alongside financial returns and is supported in this investment by the Austrian Development Bank (OeEB).[55] Public reporting by the OeEB highlights improvements in corporate governance, ESG performance, and job creation following the investment; however, no explicit reference is made to the health or nutritional impact of Quickmart's retail offer on consumers.[56]

Carrefour represents the most prominent foreign-operated chain in Kenya. Its stores are fully owned and managed by Majid Al Futtaim (MAF), a UAE-based conglomerate operating under a regional franchise agreement with Carrefour France. While Carrefour France defines global brand, quality, format, and pricing standards, MAF oversees day-to-day operations, local strategy, and financial management in the Kenyan market.

The growing role of international investment firms is widely reported to have strengthened governance, operational efficiency, and access to capital.[23,26,57] These investors provide flexible funding and impose fewer disclosure requirements than public markets, enabling rapid expansion and professionalization. Such advantages stand in contrast to the challenges faced by earlier family-run chains—such as Uchumi, Nakumatt, and Tuskys—whose governance and financial difficulties contributed to their collapse between 2015 and 2021.[24,26]

GOVERNANCE AND STORE MANAGEMENT

Supermarkets in Kenya predominantly operate under corporate ownership with centralized management structures. Store-level operations—such as inventory management, procurement, pricing, promotions, and layout—are overseen from company headquarters, enabling tight control over operational quality and consistency across branches.[58] In the case of Quickmart, the involvement of majority owner Adenia Partners has introduced a more formalized corporate governance model, strengthening internal processes and decision-making.[58]

Franchise formats are not currently used by any of the major supermarket chains, in contrast with trends observed in other markets. However, the Boston Consulting Group suggests that franchising may emerge as a future growth strategy for leading retailers as they expand their national footprints.[21]

KEY INSIGHTS FROM THE KENYA RETAIL FOOD ENVIRONMENT

Traditional retailers continue to dominate food purchasing in Kenya, but the modern grocery sector—primarily supermarkets—is expanding quickly, driven by urbanization, a growing middle class, and demand for convenience. Although still concentrated in major cities, sustained investment has enabled supermarkets to extend into secondary towns and regional centres.

Rising obesity and increased consumption of highly processed, nutrient-poor foods—especially amongst urban and higher-income households—reflect the growing influence of modern grocery retailers.

The modern retail market remains highly fragmented, although consolidation is gradually emerging. Following the exit of several major chains between 2015 and 2021, Naivas, Quickmart, and Carrefour have become the leading players, together representing an estimated 35–40% of the modern grocery market. Backed by professionalized foreign investors, including DFIs from France, Germany, Austria and the World Bank/IFC, they have driven the sector's rapid expansion.

As their footprint grows, these retailers are increasingly positioned to shape Kenya's retail food environment—both positively and negatively—by influencing product availability, pricing, and promotion, and ultimately affecting dietary choices and nutrition outcomes.

RETAILER PROFILES

Building on evidence that modern grocery retail is playing an increasingly prominent role in shaping Kenyans' diets, the Retailer Profile qualitatively assesses the extent to which the three largest modern retailers—Naivas, Quickmart, and Carrefour Kenya—engage with nutrition, embed it within their commercial practices, and take steps beyond regulatory requirements to support healthier consumer diets.

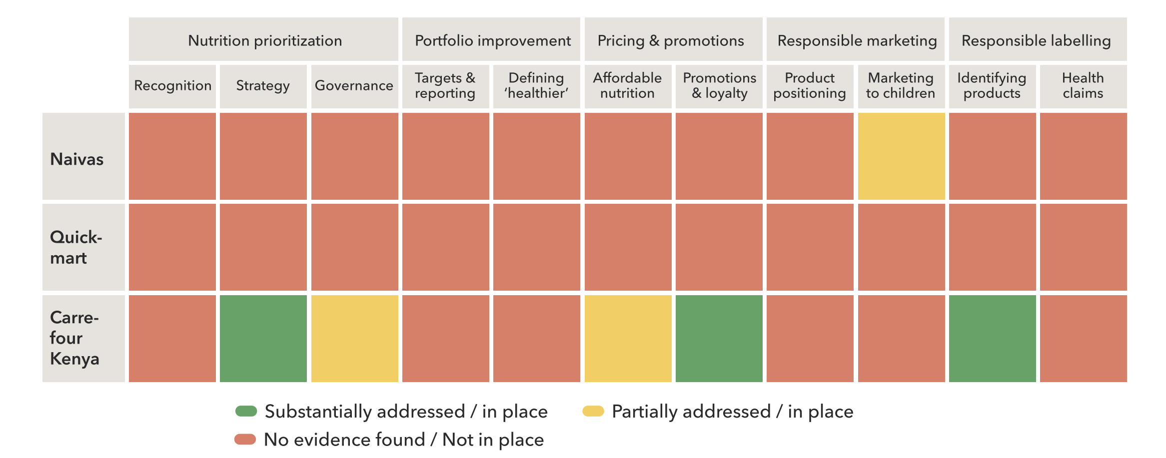
This assessment draws primarily on publicly available information; although each retailer was invited to review the findings and provide additional evidence, none took the opportunity to do so.

OVERALL FINDINGS

Active efforts to create healthier food environments and improve consumers' diets are, overall, largely absent among Kenya's largest grocery retailers (Figure 8). From the companies' publicly available information, there appears to be minimal recognition of this role and limited evidence of proactive measures being taken to address it, especially amongst the two largest retailers, Naivas and Quickmart. This is somewhat surprising given the recent involvement of international investors—IBL Group and Adenia Partners—in both companies, as these investors have stated ambitions to deliver positive societal impacts alongside financial returns and maintain links with development finance institutions, including IFC, Proparco-Groupe AFD, DEG, a subsidiary of the German KfW Group, and the OeEB.[59,60]

Encouragingly, Carrefour Kenya, the country's third largest retailer, and its parent company, UAE-based conglomerate MAF, have articulated a clear commitment to address nutrition in its retail operations and implemented several relevant initiatives, although there remain significant gaps in its efforts.

FIGURE 8
RETAILER PROFILE FINDINGS PER NUTRITION TOPIC AREA



Note: In interpreting Figure 8, 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.

The results for these retailers are consistent with findings from ATNi's 2025 Kenya Market Assessment looking at the 30 largest F&B manufacturers active in the country. It highlighted the limited but emerging efforts of F&B companies in Kenya to improve the nutritional quality of their products and to promote healthier consumer choices. Only a small number of companies were found to have published nutrition strategies, and none demonstrated comprehensive implementation in Kenya.

IN-DEPTH FINDINGS

NUTRITION PRIORITIZATION & GOVERNANCE

While only MAF and Naivas were found to have conducted a materiality or ESG-risk assessment, neither have explicitly identified consumer nutrition as a material issue. None of the companies have published a register of the risks to the company identified through its enterprise risk management process.

Nonetheless, Carrefour Kenya has recently developed an approach to address nutrition in Kenya through its 'Choose Better' campaign, launched in July 2025. The campaign aims to promote healthier and more sustainable lifestyle choices by highlighting 'healthier' products with labels and price promotions, and by providing nutrition education. The company states that it is aligned with Kenya's national priorities in public health, food security, and environmental sustainability.

The campaign sits within the 'Transforming Lives' pillar of MAF's 'Dare Today, Change Tomorrow' sustainability strategy, which aims to "promote healthy and sustainable consumer choices" through its retail product offering and marketing.

In contrast, no evidence was found that either Naivas or Quickmart prioritizes or addresses nutrition in their public disclosures and corporate strategies. Naivas publishes some information about its 'Impact Strategy' but has not included nutrition as an ESG priority area.[61] Meanwhile, Quickmart has been acknowledged by third parties for its ESG-related efforts and is reported to focus on "fresh produce, quality products, and competitive price," its motto being "Fresh & Easy."[26,62,63] However, it does not publish any specific information on its public domain about its ESG agenda or approach to nutrition.

BOX 5
POLICY: KENYA NUTRIENT PROFILE MODEL

The Kenya NPM was published in 2025, providing a clear model for assessing the healthiness of products sold in Kenya and serving as a basis for regulating food marketing, a potential health levy, and front-of-pack (FOP) labelling.[64] Retailers may choose to use the Kenya NPM to guide reformulation efforts for their private-label portfolio, as well as their FOP labelling and marketing activities.

PORTFOLIO IMPROVEMENT

None of the three retailers assessed have set public targets to increase sales of 'healthier' products or to report on the proportion of sales derived from such products. Similarly, no targets or reporting were identified among the retailers regarding the reduction of specific nutrients of concern or the increased use of encouraged ingredients in their private-label portfolios.

PRICING AND PROMOTIONS FOR HEALTHIER PRODUCTS

While both Naivas and Quickmart state that product affordability is an important element for their companies, no evidence was found of a focus on ensuring, or seeking to increase, the affordability of 'healthier' products specifically, nor of policies or initiatives to offer proportionately more price promotions or loyalty mechanisms to incentivize the purchasing of healthier products.

In contrast, Carrefour Kenya's parent company, MAF, emphasizes the importance of affordable nutrition, stating that, as a retailer, it should "remove access barriers to healthy food and increase the availability, accessibility and affordability of healthier products." It emphasizes that the Carrefour private-label offers "over 3,000 high-quality, nutritious products," although it does not state how 'nutritious products' are defined, nor how many of these are offered in Kenya. Moreover, through the 'Choose Better' initiative, the company states that it will offer customers discounts and loyalty points when purchasing products with the 'Choose Better' (healthier) logo.

The results of ATNi's independent analysis of how often retailers promote healthier versus less healthy products—in both flyers and online—is presented in the Promotions chapter, while the findings from ATNi's pricing analysis—which compares the cost and affordability of healthier and less healthy food baskets at Naivas—are presented in the Cost and Affordability chapter.

RESPONSIBLE MARKETING

No information was found indicating that any of the retailers have policies or initiatives to address in-store product placement, shelf space allocation, or promotional techniques (beyond pricing) designed to encourage healthier choices or increase fruit and vegetable sales.

Similarly, none of the three retailers have published any form of codified commitment or policy on responsible marketing to children, including explicit restrictions on marketing unhealthy products. While MAF has a Responsible Marketing Policy that includes some commitments relating to children, it does not contain any nutrition-specific provisions. Naivas' Privacy Policy states that the company "does not knowingly accept, request, or solicit information from children or knowingly market to children," but it does not define what it considers a "child" or "marketing," nor does it explain how the policy is monitored or enforced.

BOX 6
POLICY: MARKETING RESTRICTIONS FOR UNHEALTHY FOOD

In 2025, the Kenya Ministry of Health announced plans to restrict the marketing of unhealthy foods, especially those aimed at children. Proposed measures include banning such advertisements on television, digital platforms, and outdoor media during times when children are the primary audience, using the Kenya NPM.[65] While not including forms of in-store promotion, retailers may need to adjust the content of marketing campaigns to ensure compliance.

IDENTIFYING HEALTHIER PRODUCTS

Only Carrefour Kenya was found to have an initiative in place to assist consumers in identifying healthier products. As part of its 'Choose Better' campaign, the retailer has introduced 'Choose Better' labels on 'healthier' products, starting with fruits and vegetables and gradually adding private-label items. However, the company has not published information on the criteria used for private-label products to qualify for the 'Choose Better' label, such as whether a NPM is used.

No evidence was found of a policy to follow Codex Guidelines on the use of health and nutrition claims on its products, or to restrict such claims to products classified as 'healthier' according to an NPM, for any of the retailers assessed.

BOX 7
POLICY: FRONT-OF-PACK LABELLING

In 2025, the Kenya Ministry of Health proposed regulation requiring clear warning labels on packaged foods high in fat, salt and sugar, which is expected to be set as a mandatory requirement.[66] Retailers will therefore need to apply the label to their applicable private-label portfolio, and may choose to reformulate products to avoid having to display warning labels.

MISSED OPPORTUNITIES FOR NUTRITION LEADERSHIP

The findings indicate a misalignment between the growing influence of Kenya's modern grocery retailers and the extent to which nutrition is reflected in their strategies and practices. As retailers expand their footprint and shape food availability and promotion, this influence has not yet translated into a consistent or systematic approach to supporting healthier diets.

While Carrefour Kenya has taken some initial steps to address nutrition, these remain limited in scope, and there is little evidence that nutrition is being treated as a material business consideration across the retailers assessed. The absence of clear nutrition strategies, measurable targets, or policies to improve the relative availability, affordability, and promotion of healthier foods highlights a missed opportunity for retailers to demonstrate leadership and align more closely with Kenya's national nutrition priorities.

PRODUCT PROFILES

Retailers play a key role in shaping food environments through their private-label portfolio, which influences what consumers can access and afford. ATNi's Retailer Assessment 2025-2026 includes a Product Profile that objectively evaluates the nutritional quality of private-label packaged foods and non-alcoholic beverages sold by the selected grocery retailers.

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

This chapter presents the results for Kenya, focusing on the nutritional quality of the private-label portfolios of three of the largest grocery retailers: Naivas, Quickmart, and Carrefour Kenya. The results for Kenya as well as for all other countries included in the assessment can also be accessed through ATNi's interactive dashboard.

SCOPE AND METHODS

OPEN FOOD FACTS PILOT

During the Open Food Facts pilot, private-label products from Naivas, Quickmart, and Carrefour Kenya were first identified in the Innova Market Insights dataset. A Kenya-based ATNi consultant then conducted in-store validation across selected supermarkets in Nairobi to verify product availability and identify missing items. Where gaps were identified, additional products were cross-checked against the Open Food Facts product database or added to the Open Food Facts platform via the app using on-pack information, including ingredients and nutrition label information. Data quality checks were applied to ensure completeness and consistency with ATNi's nutrient profiling approach.

The pilot improved coverage of private-label products included in the Product Profile analysis and demonstrated the potential of open data platforms to strengthen product-level nutrition assessment in lower-middle-income country contexts, where commercial data sources may be incomplete.

DATA QUALITY AND AVAILABILITY

All three 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 and tea, spices, baby food, alcohol, and supplements were excluded from the analysis.

Compared with other countries included in ATNi's multi-country Retail Assessment 2025–2026, the final number of private-label packaged products available per retailer in Kenya remained small, particularly for Naivas and Quickmart, even after in-store data collection using Open Food Facts. This partly reflects differences in the scale and composition of private-label offerings. For both Naivas and Quickmart, only a limited number of private-label items were found in-store, mainly bakery and fresh products, which often do not carry on-pack nutrition information and therefore could not be included in the analysis. In addition, missing or incomplete nutrition information in the Innova Market Insights database reduced the number of eligible products. The final dataset is publicly accessible via ATNi's dedicated GitHub repository.

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

BOX 8
OVERVIEW OF NUTRIENT PROFILE MODELS AND APPROACHES

Healthiness was evaluated using four (inter-)nationally recognized NPMs and approaches:

- **Kenya NPM (2025):** The Kenya NPM assesses the healthiness of products sold in Kenya and serves as a basis for the regulation of food marketing and FOP labelling.[67] In advance of government regulatory action, retailers may choose to use the Kenya NPM to guide voluntary activities such as reformulation and reporting on the healthiness of their private-label portfolio, and restricting marketing and promotions of less healthy products.
- **Health Star Rating (HSR) (2020):** FOP labelling system developed in Australia and New Zealand that assesses nutrients of concern and positive food components per 100g or 100mL across six 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."[68]
- **Nutri-Score (2023):** A European FOP 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 both A+B and A+B+C.
- **HFSS and/or colours/flavours/NSS approach (2024):** Flags products that are high in nutrients of concern (HFSS; high in added saturated fat, sodium, and sugar) and/or that contain any of three UPF markers of, namely: colours, flavours, and/or NNS.[69]

KEY FINDINGS

This section provides an overview of the nutritional quality of private-label portfolios for the three retailers in Kenya (Table 1) and compares their results with global averages across all countries included in the Retail Assessment, as well as with manufacturer branded products in Kenya included in ATNi's 2025 Kenya Market Assessment.

TABLE 1
PRODUCT PROFILE RESULTS OF THREE KENYAN RETAILERS ACROSS FOUR NUTRIENT PROFILING APPROACHES

NPM/ Approach	Retailer Results					2025 Manufacturer Product Profile*
	Assessment criteria	Naivas	Quickmart	Carrefour Kenya	Kenya overall	
HSR	Mean HSR	4.3	5.0	2.8	2.9	2.1
	% healthier	64%	100%	46%	48%	33%
	Healthier products	9	1	80	90	246
	Total products	14	1	173	188	746
Nutri-Score	% healthier (A+B)	67%	100%	39%	41%	NA
	% healthier (A+B+C)	100%	100%	48%	51%	NA
	Healthier products (A+B)	8	1	64	73	NA
	Healthier products (A+B+C)	12	1	78	91	NA
	Total products	12	1	164	177	NA
HFSS and/or colours/ flavours/NNS	% products considered UPF	100%	NA	88%	89%	NA
	Products considered healthier	0	NA	17	17	NA
	Products considered unhealthy	4	NA	127	131	NA
	Total products	4	0	144	148	NA
Kenya NPM	% products passing Kenya NPM	14%	NA	13%	13%	10%
	Eligible products	1	NA	30	31	84
	Ineligible products	6	NA	195	201	232
	Total products	7	0	225	232	840

* Results are presented for products by 30 manufacturers assessed in ATNi's 2025 Kenya Market Assessment.

MEAN HEALTHINESS OF RETAILERS' PRIVATE-LABEL PORTFOLIOS USING HSR

The average HSR across the three Kenyan retailers was 2.9 out of 5 (188 products). Performance varied across retailers, reflecting substantial differences in portfolio size, with 14 products assessed for Naivas, one for Quickmart, and 173 for Carrefour Kenya. Compared with other countries included in the assessment, Kenyan retailers show a similarly low average HSR in line with the overall mean HSR of 2.7 (18,652 products) observed across all 18 retailers. Compared with the 2025 assessment of 746 manufacturer brand products in Kenya, the retailers' private-label products score slightly better in mean HSR and percentage of healthy products, as shown in Table 1.

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:

Kenya NPM

Overall, only 13% of products (31 out of 232) met the 'healthier' threshold under the Kenya NPM. Naivas (14%) and Carrefour Kenya (13%) showed similarly low proportions of products meeting the national NPM criteria, while no private-label products from Quickmart could be included in the analysis due to data availability. Private-label products by retailers in Kenya performed slightly better than products by multinational and national food manufacturers sold in the same supermarkets and other formal and informal retail outlets throughout Kenya, as assessed in ATNi's Kenya Market Assessment 2025. That assessment showed that out of 840 products identified from 30 different manufacturers, only 10% would pass Kenyan health standards as established by the Kenya NPM.

HSR

Across the three Kenyan retailers, 48% of assessed private-label products (90 out of 188) met the 'healthier' threshold of HSR ≥3.5. This proportion is broadly comparable to the overall average of 41% observed across all 18 retailers (7,724 out of 18,652 products) included in the assessment. However, interpretation of retailer-level differences should be approached with caution, given the substantial variation in the number of products assessed across the three Kenyan retailers.

Nutri-Score

Nutri-Score results reveal a similar pattern to HSR. Because Nutri-Score was not originally designed as a binary measure, both threshold approaches are presented for transparency: 41% for the A+B threshold and 51% for the A+B+C threshold across the three Kenyan retailers (177 products in total).

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

HFSS and/or colours/flavours/NNS approach

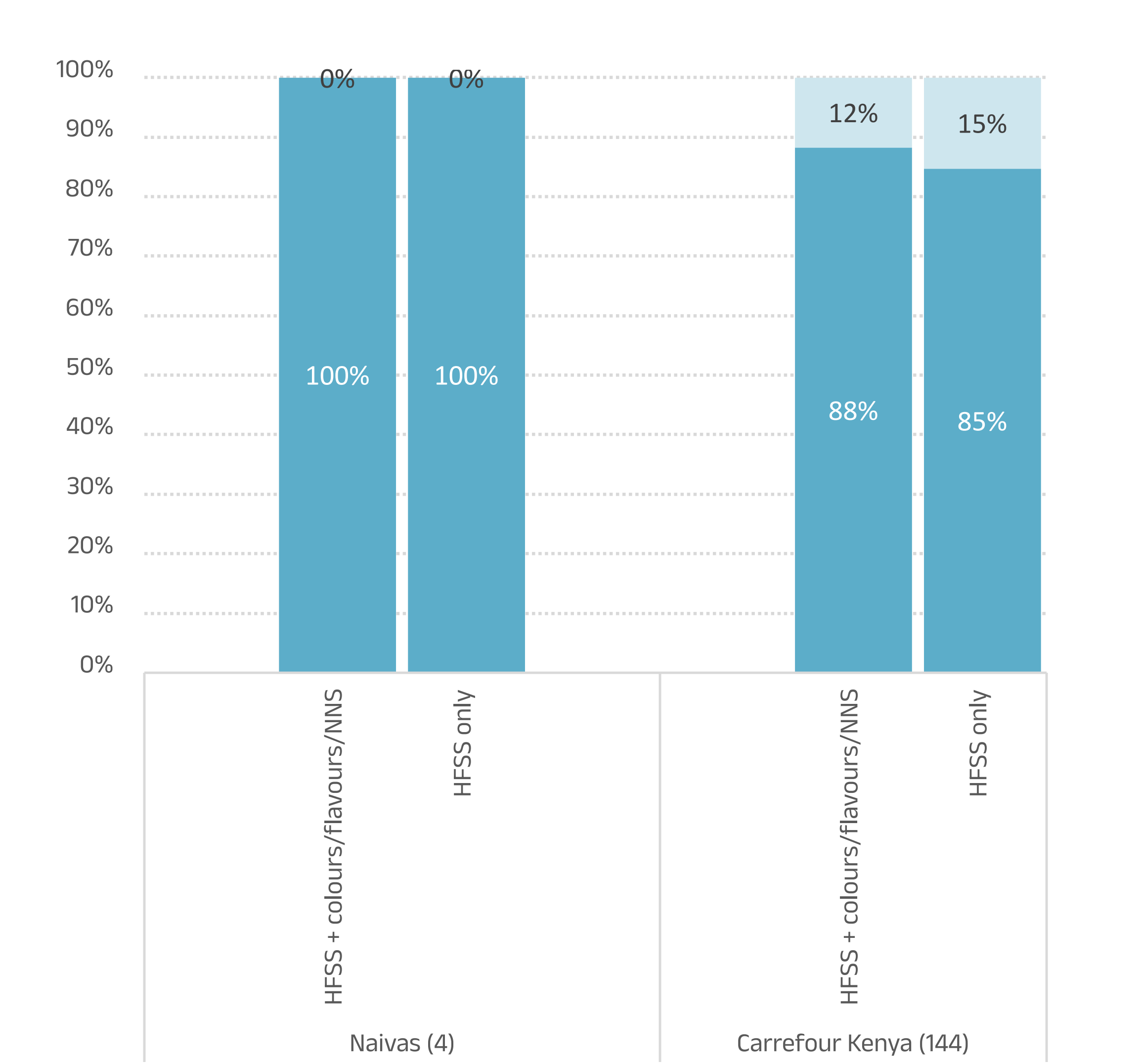
The proportion of private-label products classified as 'unhealthy' under the high in fat, sugar and sat (HFSS) approach and/or UPF markers (colours/flavours/NNS) approach was very high for both Naivas and Carrefour Kenya: 88% for Carrefour Kenya (127 out of 144 products) and 100% for Naivas (4 out of 4 products) (Figure 9).

For Naivas, this analysis could only be conducted on four products due to limitations in the data available in the Innova dataset, which were verified through targeted in-store checks. Many products—particularly ready-made baked goods—lacked nutrition labelling or complete ingredient lists, while products in other categories were excluded due to missing sodium values and/or ingredient information. In addition, insufficient data were available to include Quickmart in the analysis.

In light of these data limitations, the proportion of products classified as 'unhealthy' among the Kenyan retailers is slightly higher than the overall share of 'highly processed' products across all retailers included in the assessment (86%; 15,639 out of 18,195 products).

FIGURE 9

PROPORTION OF TOTAL PRODUCTS CONTAINING HFSS AND/OR COLOURS, FLAVOURS, NNS (MARKERS FOR UPF PRODUCTS) FOR TWO RETAILERS IN KENYA: NAIVAS (4) AND CARREFOUR KENYA (144)



BOX 9

REFORMULATION AND THE REMOVAL OF SYNTHETIC DYES

In other countries included in the assessment, such as the US, 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 does it change a product's classification under processing-based models such as the HFSS and/or UPF 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 still contain 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 persist if cosmetic additives or sweeteners remain present.

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 MANUFACTURER PORTFOLIOS USING HSR ON A PRODUCT-CATEGORY LEVEL

At an aggregate industry level, the nutritional quality of retailers' private-label portfolios in Kenya is slightly higher compared to that of leading manufacturers operating in the Kenyan market, as assessed in the 2025 Kenya Market Assessment. When directly comparing across the same product categories, the mean HSR of private-label products across Naivas, Quickmart, and Carrefour Kenya was 3.0 (181 products), compared with a substantially lower mean HSR of 2.5 across 531 packaged F&B products sold in Kenya by 29 leading manufacturers (Table 2).

This pattern is consistent with ATNi's broader Retail Assessment findings, where private-label products generally performed better than manufacturer brands across countries (mean HSR 2.7 versus 2.4). Evidence from other settings supports this pattern. For example, 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.[70] 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.[71]

TABLE 2

COMPARISON OF MEAN HSR BETWEEN PRIVATE-LABEL PRODUCTS AND MANUFACTURER PRODUCTS IN KENYA, AS ASSESSED IN ATNI'S KENYA MARKET ASSESSMENT 2025

	Kenya Retail Assessment				East Africa Market Assessment – Manufacturers*			
Category	**Mean HSR**	**% healthy products**	**Healthy products**	**Total products**	**EAMA - mean HSR**	**EAMA - % healthy products**	**EAMA - healthy products**	**EAMA - total products**
Baked Goods	3.6	75%	6	8	2.8	50%	3	6
Bottled Water	5.0	100%	2	2	5.0	100%	10	10
Breakfast Cereals	4.0	67%	4	6	4.1	83%	33	40
Concentrates	0.5	0%	0	7	0.5	0%	0	13
Confectionery	1.1	6%	1	16	1.0	9%	10	109
Dairy	3.4	71%	5	7	3.8	87%	117	135
Edible oils	1.0	0%	0	1	1.8	14%	3	21
Ice cream	1.9	7%	1	15	1.8	0%	0	23
Processed Fruit and Vegetables	4.6	96%	47	49	5.0	100%	9	9
Processed Meat and Seafood	0.5	0%	0	4	4.8	100%	3	3
Rice, pasta and noodles	3.8	74%	14	19	2.0	39%	12	31
Sauces, dips and condiments	2.8	33%	4	12	2.0	8%	1	12
Savoury snacks	1.3	0%	0	12	2.5	16%	11	68
Sweet biscuits, snack bars and fruit snacks	1.1	0%	0	6	1.7	9%	4	46
Sweet spreads	2.4	24%	4	17	2.9	40%	2	5
Total	**3.0**	**49%**	**88**	**181**	**2.5**	**41%**	**218**	**531**

* Includes products from 29 (out of 30) leading manufacturers with the highest estimated packaged F&B retail sales in Kenya in 2022, as assessed in ATNi's East Africa Market Assessment 2025, covering only product categories that overlap with those included in the retailer dataset.

FORTIFICATION

Kenya's fortification activities are guided by the Kenya National Food Fortification Strategic Plan (2018–2022), which provides a five-year roadmap for improving fortification and addressing barriers.[72] Kenya mandates the fortification of wheat flour, dry-milled maize products, edible oil, and table salt (Table 3).[73] Kenya also has moved towards including rice in national fortification—with a drafted East African Standard under review, and implementation timeline that remains unclear. In addition, Kenya has the 'Kuboresha Afya' fortification logo, which applies to maize meal, wheat flour, sugar, salt and vegetable oil products that are fortified (Table 4).[74]

Limited evidence was found of the selected retailers selling private-label versions of foods subject to mandatory fortification requirements—including wheat and maize flours, edible oil and table salt. Meanwhile, several private-label rice products were identified for the selected retailers. This represents an opportunity for retailers to take action once the voluntary rice fortification guidelines come into effect.

TABLE 3
OVERVIEW OF FORTIFICATION POLICIES IN KENYA

Food category	Voluntary/ Mandatory	Specified micronutrients
Wheat flour	Mandatory	Vitamins A, B1, B2, B3, B6, B12, folic acid, iron and zinc[75]
Milled maize products	Mandatory	Vitamins A, B1, B2, B3, B6, B12, folic acid, iron, and zinc[75]
Edible oil	Mandatory	Vitamin A[75]
Table salt	Mandatory	Iodine[75]

TABLE 4
KENYA'S FORTIFICATION LOGO

Label name	Description	Image
Kuboresha Afya	Applies to staple foods subject to mandatory fortification, including packaged maize meal, wheat flour, salt and vegetable oils and fats. In addition, the label also applies to sugar, despite not being mandatorily fortified.[74]	

PROMOTIONS

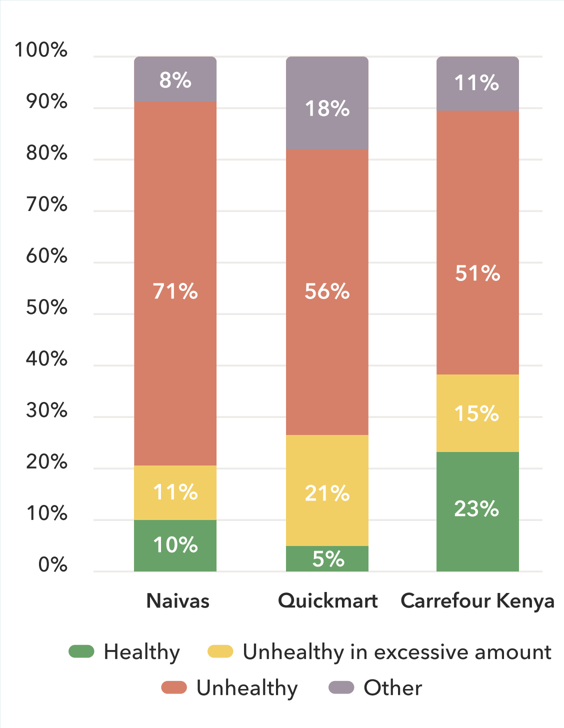
As part of ATNi's Retail Assessment 2025-2026, an independent analysis was conducted of F&B promotions featured in the flyers and e-commerce websites of the three grocery retailers assessed in Kenya.

This research component examines 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 Naivas, Quickmart, and Carrefour Kenya is provided below.

A total of 803 food products were analyzed from two flyers from Carrefour Kenya, and from promotions listed on Naivas and Quickmart's e-commerce webpage. On average, Carrefour Kenya featured 37 food products per issue, while Naivas and Quickmart's promotional webpages yielded a total of 414 and 316 food products, respectively.

Figure 10 illustrates the proportion of promoted foods categorized as healthy, unhealthy in excessive amounts, unhealthy, and other products. Overall, all retailers allocated less than one-fourth of their flyer space to the promotion of healthy foods. Among the three, Carrefour Kenya featured the highest share of healthy items (23%), followed by Naivas (10%) and Quickmart (5%).

FIGURE 10
PROPORTION OF HEALTHY, UNHEALTHY IN EXCESSIVE AMOUNTS, 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. Carrefour Kenya—which had the highest overall share of healthy foods—focused primarily on legumes (10%), followed by vegetables (6%) and fruits (2%). Naivas promoted a similar proportion of fruits (3%) but considerably lower shares of vegetables (3%) and legumes (2%). In contrast, Quickmart's healthy food promotions centred mainly on nuts and seeds (2%).

TABLE 5
MEAN PERCENT OF HEALTHY FOOD IN FLYERS

Healthy Food Group	Carrefour Kenya	Naivas	Quickmart
All fruits	2.4%	2.7%	0.0%
Citrus fruits	1.2%	0.7%	0.0%
Deep orange fruits	0.0%	0.2%	0.0%
Other fruits	1.2%	1.7%	0.0%
All vegetables	6.0%	2.9%	1.3%
Dark green leafy vegetables	0.0%	0.2%	0.0%
Cruciferous vegetables	2.4%	0.0%	0.0%
Deep orange vegetables	0.0%	0.2%	0.0%
Other vegetables	3.6%	2.4%	1.3%
Legumes	10.5%	1.7%	0.0%
Deep orange tubers	0.0%	0.0%	0.0%
Nuts and seeds	0.0%	0.2%	1.6%
Whole grains	0.0%	0.5%	0.6%
Fish and shellfish	0.0%	0.0%	0.0%
Poultry and game meat	1.2%	1.5%	0.0%
Low fat dairy	1.2%	0.0%	1.0%
Eggs	0.0%	0.7%	0.0%
Healthy ready meals	0.0%	0.0%	0.0%
Unsweetened beverages	1.6%	0.0%	0.3%

Table 6 summarizes the promotion of unhealthy food groups across the retailers. Carrefour Kenya had a lower overall proportion of unhealthy promotions, but refined grains, baked goods, and snacks (27%) featured more prominently in its flyers than in Naivas or Quickmart. For Naivas, the same category was also most frequently promoted (19%), followed by juices (13%), sweets and ice cream (12%), and SSBs (11%). In contrast, Quickmart most frequently promoted sweets and ice cream (18%), followed by refined grains, baked goods, and snacks (14%), and sauces, dips, and condiments (12%). High-fat dairy products (12%) were also more commonly promoted at Quickmart than at the other two retailers.

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

Unhealthy Food Group	Carrefour Kenya	Naivas	Quickmart
High-fat dairy*	2.4%	5.8%	11.7%
Red meat*	5.2%	0.2%	0.0%
Oils and fats*	6.8%	5.1%	9.5%
Processed meat	2.8%	2.9%	1.0%
Sauces, dips, and condiment	2.8%	10.9%	11.7%
Refined grains, baked goods, and snacks	26.8%	19.1%	13.6%
Sweets and ice cream	4.4%	12.1%	18.4%
Sugar-sweetened beverages	9.6%	11.4%	9.2%
Juice	1.2%	12.6%	0.3%
White roots and tubers	1.2%	0.0%	0.0%
Purchased deep fried foods and unhealthy ready meals	2.8%	1.9%	1.6%

* Foods that are unhealthy in excessive amounts.

BOX 10
MARKETING AND LABELLING POLICIES

In 2025, the Kenya Ministry of Health announced plans to restrict the marketing of unhealthy foods, especially those aimed at children. Proposed measures include banning such advertisements on television, digital platforms, and outdoor media during times when children represent a large share of the audience.

In addition, in 2025, the Kenya Ministry of Health proposed regulation requiring clear warning labels on packaged foods high in sugar, salt, or fat, which is expected to become a mandatory requirement.[76]

Our finding that retail food promotions in Kenya are dominated by unhealthy products aligns with previous research. A recent study assessing 115 retail outlets across urban and rural areas in Kenya reported that, among 922 food items advertised through banners, posters, and flyers, UPFs were the most frequently promoted category (60%).[34] The study also noted that higher rates of UPF promotion were associated with urban settings, areas of higher socio-economic status, and larger modern retail outlets.[34]

SSBs emerged as the most heavily promoted products, both within retail advertising and across other media platforms such as popular radio channels.[77,78] A study conducted in Ghana and Kenya found that nearly half of all F&B advertisements in retail outlets were for sweetened drinks, while promotions for healthier options were relatively limited.[78] Similarly, more than half of the food products featured in radio promotions were UPFs, the majority of which were SSBs.[77]

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 2025–2026: the US, France, Indonesia, South Africa, the Philippines, and Kenya, using a standardized food basket approach. Retail food baskets were constructed based on the EAT-Lancet Reference Diet (2019), 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.

Pricing data for Kenya were available exclusively for Naivas, as it was the only retailer included in Euromonitor International's 2022 data scraping. Quickmart and Carrefour Kenya were not covered by the data provider. The Pricing Analysis revealed a clear and consistent cost disparity between healthier and less healthy retail food baskets. At Naivas, the healthier basket was substantially more expensive (27.58 PPP-adjusted USD) than the less healthy basket 20.84 PPP-adjusted USD).

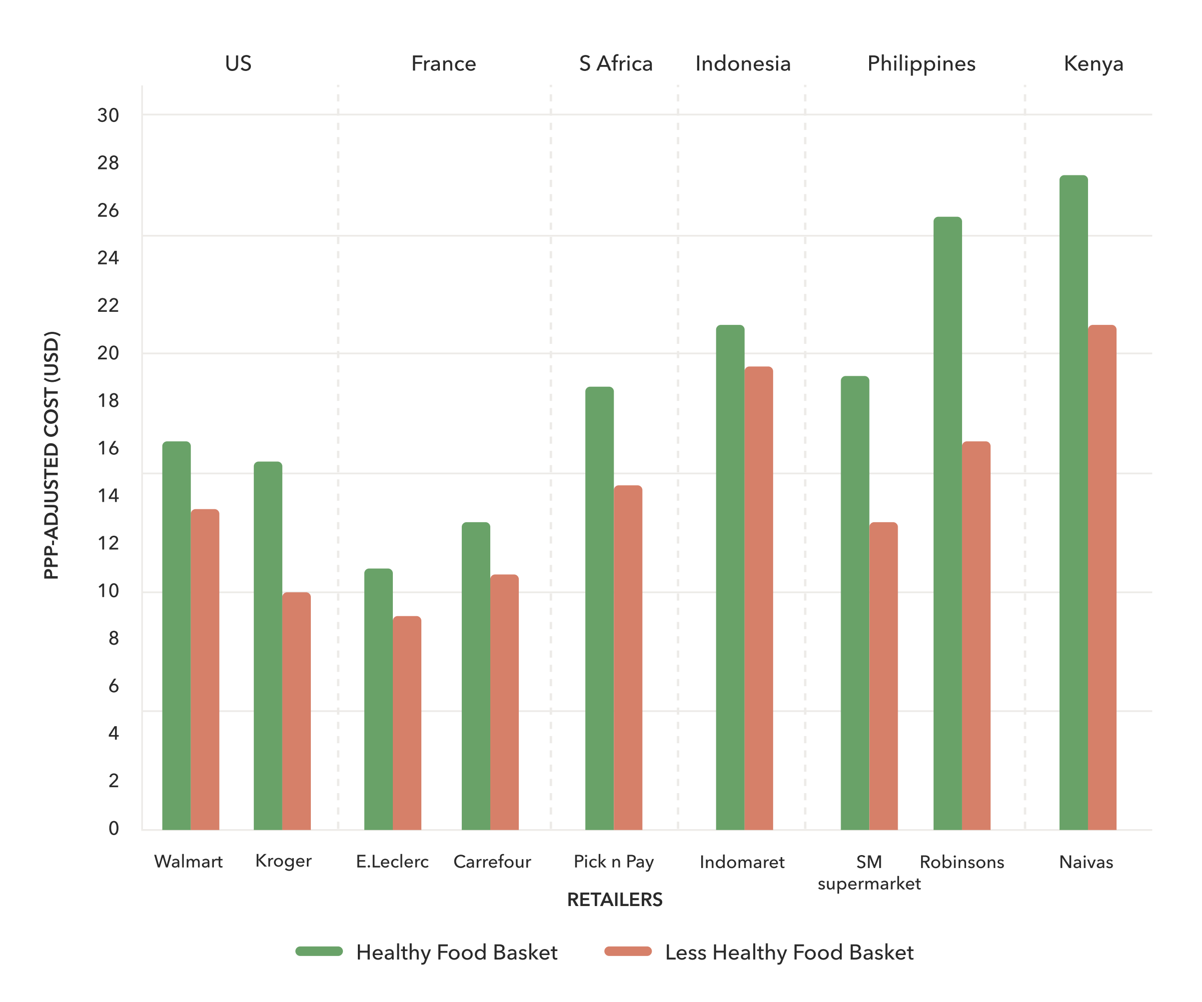
When expressed as a share of daily per capita income, the affordability gap is particularly pronounced. The healthier retail food basket accounted for 64.6% of daily per capita net income, compared with 48.8% for the less healthy basket. This indicates that even the less healthy basket represents a significant share of average disposable income, while the healthier basket is largely unaffordable for most consumers.

In absolute terms, and when adjusted for purchasing power parity, Naivas had the most expensive healthier food basket among the nine retailers assessed across the US, France, South Africa, Indonesia, and the Philippines. This finding underscores the extent to which healthier diets remain financially out of reach in lower-middle-income contexts when sourced through modern grocery retail.

These affordability gaps are likely influenced by broader market dynamics rather than retailer-specific pricing strategies alone. Naivas primarily serves higher-income urban consumers, and the analysis does not capture food purchasing through traditional markets or informal vendors, which remain important sources of fresh and minimally-processed foods for many Kenyan households.

FIGURE 11

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



Nonetheless, the findings highlight a critical limitation in the current retail food environment: within modern grocery retail, healthier food choices are consistently priced at a premium relative to less healthy alternatives. As modern retailers continue to expand their footprint in Kenya, this pricing structure risks reinforcing existing inequalities in diet quality and steering consumers toward cheaper, less nutritious options.

Addressing the affordability of healthier foods will therefore be essential if retailers are to play a meaningful role in improving diets and supporting national nutrition objectives. This will require stronger alignment between pricing strategies, private-label product development, and public health goals, alongside complementary policy measures to reduce structural barriers to affordable healthy diets.

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

BOX 11

FISCAL NUTRITION POLICIES

Since 2015, Kenya has applied an excise tax on all soft drinks, with or without sugar and sweetener content, as well as an excise tax on sugar confectionery products and chocolate since 2018.[79] The WHO recommends that SSB taxes apply to all SSB types to avoid unwanted substitutions, and proposes also taxing non-sugar-sweetened beverages due to evidence that they do not contribute to effective weight control.[80] However in the case of Kenya's taxes, due to the tax rates not being linked to nutrient content, these are understood as primarily revenue-generating taxes rather than for health promotion.[81] While proposals have been made for a health promotion levy on SSBs, these have not yet been formally enacted.[82]

An update to this analysis is pending resource availability, incorporating the EAT-Lancet 2025 Reference Diet and including two additional retailers from the overall Retail Assessment, for which data are currently being collected by EMI at ATNi's request. The full methodology, data sources, analytical framework, results, and recommendations, is available in the ATNi Retail Assessment 2025 Pricing Analysis Report.

CONCLUSION AND RECOMMENDATIONS

As Kenya's modern grocery retailers continue to expand their footprint, their influence over food availability and affordability is increasing. This assessment shows that, to date, this growing influence has not been matched by systematic efforts to integrate nutrition into retail strategies, governance, and commercial practices. The recommendations below outline priority actions for Kenyan retailers, alongside complementary actions for policymakers and investors, whose decisions and incentives play a critical role in shaping accountability, market conditions, and the pace of progress towards healthier food environments.

FOR RETAILERS

1 Strengthen nutrition governance and accountability

- Explicitly recognize consumer health and nutrition as an important material business issue incorporating it into materiality and ESG risk assessments, and identify and disclose nutrition-related risks within enterprise risk disclosures.
- Integrate nutrition considerations across commercial strategy, developing a comprehensive strategy to improving 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 and proportion of UPF products in the portfolio, 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 the Kenya NPM or other internationally recognized NPMs.
- 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 the overall product offering and private-label portfolios through product reformulation and innovation, and by demanding and selecting healthier products from suppliers of (multi-)national brand products to ensure a higher proportion of products meet 'healthier' thresholds.
- Set specific reformulation targets to reduce sodium, sugars, and saturated fat in high-volume private-label categories—particularly those identified as less healthy in the Product Profile (e.g. snacks, baked goods, sauces, and confectionery).

- Reduce the use of unnecessary additives and increase the availability of more minimally-processed options within private-label assortments and in the selection of (multi-)national brand products in the portfolio.

- 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.

- Where relevant, align private-label products with national fortification requirements and emerging voluntary fortification guidelines, particularly for staple food categories.

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 company 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 UNICEF recommendations, and assess compliance through independent third-party audits.

6 Address affordability of healthier foods

- 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 Restrict marketing and price promotions of unhealthy foods, using the Kenya NPM

- For restricting marketing of unhealthy foods to children, an age threshold of 18 should be used.
- Policymakers are recommended to review the regulation on health and nutrition claims to ensure claims may only be placed on labels of 'healthy' products as defined by the Kenya NPM.

2 Implement the proposed Kenyan FOP warning labels on a mandatory basis

- Mandatory warning labels have been shown to shift consumer behaviour towards healthier products and to drive reformulation by manufacturers, reducing nutrients of concern so that products no longer need to carry such labels.[83]

FOR INVESTORS

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

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

2 Regularly engage with retailers to encourage them to:

- Publicly set and report against time-bound targets to improve the healthiness of their product portfolios, using internationally recognized NPMs.
- Support the introduction and use of the Kenya NPM as proposed by the Government for FOP labelling, marketing to children and other applications.
- 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.
- 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.
- Foster transparent and standardized reporting by food retailers on nutrition.

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