



**SOUTH AFRICA
RETAIL
ASSESSMENT
2026**

Country Report



TABLE OF CONTENTS

ACKNOWLEDGEMENTS / DISCLAIMER	3
ACRONYMS	4
GLOSSARY	5
SUMMARY	6
INTRODUCTION	9
METHODOLOGY	10
MAPPING THE RETAIL LANDSCAPE	11
RETAILER PROFILES	22
PRODUCT PROFILES	28
PROMOTIONS	35
COST AND AFFORDABILITY	38
CONCLUSION AND RECOMMENDATIONS	40
REFERENCES	43

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 analyses 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 organisation 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](#).

ACKNOWLEDGEMENTS

The assessment was developed by ATNi's project team, which includes Sameea Sheikh (Project lead), Dr. Brenda de Kok (Research lead), Will Sharp, Freddie von Kaufmann, Elwina Meylentia, Rachel Nel, Daniela Hernández Morales (Researchers), Mark Wijne, Babs Ates (Research oversight); together with Eaindra Aye, Valda Rahima (Data analysts) and Aurélie Reynier (Data oversight); and Gulden Timur, Veronica Maxey (Communications officers), and Katherine Pittore (Communications and Policy lead); with overall support from Greg Garrett (Executive director). We would also like to thank colleagues for their support in various steps of the process: Elena Schmider, Efi Chatzinikolaou (Investor engagement), Philip Eisenhart (Media and PR), and a special thanks to ATNi consultants Dr. Elizabeth Dunford (Product Profile), Kaitlyn Elavaza (Data collection), and Dr. Yinjie Zhu (Pricing).

The ATNi team drew on the expertise and advice of the ATNi Retail Assessment Advisory Group members: Prof. Adrian Cameron, Prof. Christina Vogel, Prof. Mary Story, Prof. Jessica Fanzo, Chris Holmes, and Prof. Poh Bee Koon. ATNi would also like to thank Dennis Petri for design support, WRENmedia for editing and proofreading, September Studio for web support, and 73Bit for setting up the data platform. The findings in this report do not necessarily reflect the views of the

group's members or their institutions. We extend our sincere thanks to all the individuals and organizations we interviewed for generously sharing their time and insights, which have been invaluable to the development and success of this project.

Suggested citation: ATNi. South Africa Retail Assessment 2026. Utrecht: ATNi; 2026 p. 1-46. Available from: [here](#).

DISCLAIMER

The information in this report is provided "as is", without any express or implied warranties or representations. The user of the information agrees that any use of the information is at their own risk. All implied warranties with respect to the information are expressly excluded and disclaimed, to the maximum extent permitted by applicable law.

In preparing this publication, the authors used Microsoft Copilot (Microsoft Corporation, 2025) and ChatGPT (OpenAI, 2025) to assist with language editing and improving flow. The text of this publication has been thoroughly reviewed for veracity, authority, data protection and ethical considerations.

Without limiting any of the foregoing and to the maximum extent permitted by applicable law, in no event shall the Access to Nutrition Foundation nor any of its affiliates or contributors to or included in ATNi's Retail Assessment 2025 have any liability regarding any information contained in this report for any direct, indirect, special, punitive, consequential (including lost profits), or any other damages, even if notified of the possibility of such damages.

CONFLICT OF INTEREST

ATNi is firmly and unequivocally independent from the food and beverage industry. To protect the integrity of our work and mission: ATNi does not accept any funding, gifts, sponsorships, or in-kind contributions from the food industry or any private sector actors. Additionally, ATNi does not enter into partnerships or agreements that could compromise our objectivity or create real or perceived conflicts of interest. All engagements are transparently documented, and any potential conflicts of interest are proactively identified and mitigated. Please see the [Conflict of Interest](#) policy for more details.

ACRONYMS

ARB	Advertising Regulatory Board
ATNi	Access to Nutrition initiative
CAGR	Compound Annual Growth Rate
ESG	Environmental, social and governance
F&B	Food and beverage
FBDG	Food-based dietary guidelines
FOP	Front-of-pack
GDA	Guideline Daily Amount
GDQP	Global Dietary Quality Project
GNI	Gross National Income
HFSS	High in fat, sugar, and salt
HHI	Herfindahl-Hirschman Index
HPL	Health promotion Levy
HSR	Health Star Rating
KPI	Key Performance Indicator
NCD	Non-Communicable Disease
NFNSS	South African National Food and Nutrition Security Survey
NPM	Nutrient Profile Model
PPP	Purchasing Power Parity
SASSA	South African Social Security Agency
SSB	Sugar-sweetened beverage
UPF	Ultra-processed food (NOVA-4)
WHO	World Health Organization

GLOSSARY

Key terms are outlined below; the full glossary is available in the full [methodology](#).

Convenience store: Grocery retail outlets selling a wide range of groceries, typically characterized by extended opening hours, a selling area under 400m², and a range of foodservice products such as takeaway or made-to-order hot foods [Euromonitor International, Passport].

Hypermarket: Similar to supermarkets but larger, with over 2,500m² selling space. Hypermarkets also sell a range of non-grocery merchandise and are frequently located on out-of-town sites or as anchor stores in shopping centres. In the US, they are often referred to as 'supercentres'. Excludes cash-and-carry, warehouse clubs, and mass merchandisers [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 'trading brands' or 'retail banners'.

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

Retail food environment: A component 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, including non-perishable products (e.g. rice, pasta and sauces), fruit and vegetables, beverages, and household products. Usually have a selling space between 400 and 2,500m². Excludes discounters, convenience stores, and small independent grocery stores [Euromonitor International, Passport].

Spaza: Small, often informal retail businesses in South Africa, similar in format to tuck shops or convenience stores. They operate primarily in low-income urban areas and provide a selection of basic goods including drinks, cigarettes, bread, and produce. [SME South Africa]^{1,2}

Ultra-processed food (UPF): 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 are introduced during manufacturing to enhance taste, texture, and shelf life, resulting in products such as sweet and savoury snacks, instant noodles, confectionery, meat substitutes, and soft drinks.

SUMMARY

PURPOSE AND SCOPE

ATNi's South Africa Retail Assessment 2025 evaluates how leading South African food retailers influence access to nutritious and affordable foods. It examines retailers' stated nutrition strategies, targets, and governance, and compares these with independent assessments of their practices, based on analysis of private-label portfolios, promotional activities, and the pricing of retail food baskets.

The findings provide insight into how retailers shape food environments and highlight opportunities to enhance their role in promoting healthier and more equitable diets. For South Africa, the analysis focuses on three of the country's largest grocery retailers: Shoprite Holdings Ltd (33-35% market share of modern retail; operator of Shoprite, Checkers and Usave), Pick 'n' Pay Stores Ltd (15-17%; operator of Pick n Pay and majority owner of Boxer), Internationale Spar Centrale BV (15-17%; operator of Spar).

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—Shoprite, Pick n Pay, and Spar—address nutrition within their business practices, commercial strategies, and corporate policies and evaluates whether retailers go beyond regulatory compliance to support healthier diets. The analysis draws primarily on publicly available information. All retailers were given the opportunity to review initial findings and provide additional evidence; only Pick n Pay submitted supplementary information.

The Product Profile evaluates the nutritional quality of private-label packaged food and beverages using internationally recognized nutrient profile models (NPMs). Promotional practices and affordability are analyzed using established international analytical frameworks aligned with global nutrition guidance, including the 2019 EAT-Lancet Reference Diet.

By combining these elements, the assessment generates context-specific insights for South Africa while enabling 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

South Africa has one of the most developed grocery retail markets in Sub-Saharan Africa, having reached advanced levels of modern retail development earlier than many countries in the region. Modern retail now represents 80.2% of national grocery sales, with increasing penetration into low-income urban and rural areas.

Supermarkets dominate the modern grocery sector accounting for 54.7% of the market, far exceeding independently owned stores (16.7%). These retailers are all publicly listed, reflecting the intense competition between brands, and need for capital investment. Retailers operate through a mix of corporate ownership and franchising models. Shoprite relies predominantly on corporate ownership and centralized control, while Pick n Pay and Spar rely on franchising as a strategy for expansion.

The growth of modern retail coincides with increasing availability and consumption of ultra-processed, nutrient-poor, packaged foods, which represented more than 60% of packaged food sales in 2023. Despite wider access to retail formats, access to healthier foods remains unequal across income groups.

Higher-income households shop almost exclusively at formal retailers for both daily and bulk purchases, while lower-income households rely on supermarkets for periodic bulk shopping—often aligned with social grant payments—complemented by more frequent purchases from informal outlets such as spaza shops and street vendors.

RETAILER ASSESSMENT FINDINGS

Retailer Profile: Nutrition strategies and corporate commitments

All three retailers—Shoprite, Pick n Pay, and Spar—embed nutrition within broader environmental, social, and governance (ESG) agendas. However, the depth of their nutrition commitments varies. Pick n Pay demonstrates the most comprehensive approach, including promotional incentives for fresh produce and incorporating a government-endorsed NPM into their front-of-pack (FOP) labelling system. Shoprite and Spar show more limited progress, focusing primarily on general sustainability commitments. None of the retailers link executive remuneration to nutrition-related key performance indicators (KPIs), and governance structures lack dedicated nutrition oversight. While Pick n Pay reports selected reformulation achievements (e.g. reductions in salt and sugar), none of the retailers set clear, time-bound nutrition targets or report systematically on progress.

Retailer Profile: marketing policies and consumer information

Pick n Pay leads in responsible marketing practices, implementing “healthier fair queue aisles” that limit the placement of less healthy products and expand better-for-you options at checkouts. Both Pick n Pay

and Shoprite adhere to the Advertising Regulatory Board’s (ARB) Code and, in the case of Pick n Pay, the Responsible Marketing to Children Pledge. Spar lacks documented commitments in this area.

However, these voluntary codes fall short of World Health Organization (WHO) recommendations, as they apply weak nutrient thresholds and do not fully cover digital marketing or point-of-sale techniques. Labelling practices also vary. Pick n Pay and Spar display ‘Guideline Daily Amount’ (GDA) icons, while Pick n Pay adds its ‘LiveWell Club’ logo to healthier private-label products. Shoprite provided no evidence of additional labelling beyond regulatory requirements.

Product Profile: nutritional quality and levels of processing

An analysis of 3,496 private-label products across South Africa’s leading retailers found that the majority do not meet nutritional criteria to be considered healthy. Across retailers, only 37% of assessed products met a Health Star Rating (HSR) of 3.5 or higher (out of 5) to be classified as ‘healthier’. The proportion of ‘healthier’ private-label products was broadly comparable across retailers, although the number of products included in the analysis varied considerably. Shoprite had 41% of assessed products classified as healthier (541 of 1,324 products), compared with 38% at Pick n Pay (543 of 1,412 products) and 28% at Spar (211 of 760 products).

Applying the South African NPM for front-of-pack (FOP) labelling (under Draft R3337) to 3,510 private-label products indicates that fewer than one-third (30%) would not be required to carry a warning label on-pack.

Furthermore, 87% of products were classified as unhealthy using an approach combining products high in fat, salt or sugar (HFSS) with ultra-processing food (UPF) markers, including colourants, flavours, or non-nutritive sweeteners (NNS).

Promotions

Analysis of total of 1,194 food products from two biweekly flyers from Shoprite, Pick n Pay and Spar showed that each retailer dedicated less than one-quarter of flyer space to 'healthier' products. Spar had the highest share of unhealthy items (67%), followed by Shoprite (62%) and Pick n Pay (53%).

Affordability of healthier and unhealthy food baskets

Pricing data were available for Pick n Pay only. Pricing data for Shoprite and Spar were not accessible via Euromonitor International's VIA platform at the time of publication and could therefore not be included.

At Pick n Pay, the healthier retail food basket was 30.2% more expensive than the less healthy basket. In purchasing power parity (PPP)-adjusted terms, the healthier basket cost USD 18.56 per person per day compared with USD 14.26 for the less healthy basket.

Both baskets absorbed a substantial share of income. The healthier basket represented 44.7% of daily per capita gross national income (GNI), compared with 34.4% for the less healthy basket, and 28.3% of daily per capita net income, compared with 21.7% for the less healthy basket. This persistent price gap highlights the challenge of making healthier diets financially accessible through modern retail.

CONCLUSION

The South Africa Retail Assessment 2025 highlights the significant influence of modern grocery retailers within a highly developed retail market, yet a limited translation of nutrition commitments into measurable outcomes. While Shoprite, Pick n Pay, and Spar acknowledge nutrition within broader ESG strategies, none have set clear, time-bound nutrition targets or report on sales-weighted nutrition performance.

Private-label portfolios remain largely dominated by products that do not meet national or international nutrient profile thresholds, with only around one-third classified as 'healthier'. Promotional practices further reinforce these patterns. Across all three retailers, less than one-quarter of flyer space is allocated to healthier products, while refined grains, snacks, sweets, sugar-sweetened beverages (SSB), and other less healthy categories dominate promotions. Affordability remains a structural barrier. At Pick n Pay, healthier food baskets are 30.2% more expensive than less healthy ones, reinforcing constraints on healthier choices for many households.

Taken together, these findings underscore the need for stronger governance, measurable targets, improved private-label portfolios, rebalanced promotional strategies, and alignment with emerging regulations such as Draft Regulation R3337 to ensure South Africa's retail sector more effectively supports national nutrition and public health goals.



INTRODUCTION

RETAILERS AND THE FOOD ENVIRONMENT

In contrast to other Sub-Saharan African countries, South Africa has the most advanced supermarket sector. The formal modern retail market is steadily expanding and is becoming increasingly concentrated, with the three largest retailers accounting for more than half of the market. To better understand this sector's influence on public health, ATNi developed the Retail Assessment 2025-2026, which evaluates leading food retailers in South Africa on their commitments, policies and practices related to nutrition and health. The assessment provides evidence to strengthen accountability and guide progress toward creating healthier food environments.

The grocery retail environment—where food is purchased for immediate or later consumption—represents a major component of the physical food environment and plays a critical role in shaping dietary patterns. Food retailers influence consumer choices through their decisions on product formulation, pricing, placement, and promotion, thereby shaping the visibility, affordability, and desirability of different

foods. Their strategies can either support or hinder healthier diets, depending on how they prioritize and promote nutritious products.

In South Africa, modern retailers have progressively expanded into low-income and rural areas, playing a growing role in South Africans' diets. While informal retail remains important for daily and weekly food purchases—particularly among low-income and vulnerable groups—modern channels now account for approximately 80% of food purchases nationwide.³ This expansion has increased access to a wider range of foods; however, substantial gaps in access to affordable, desirable, healthy options persist. The growing availability and consumption of ultra-processed, nutrient-poor packaged foods across all income groups highlight how retail practices can undermine diet quality. Together, these trends contribute to South Africa's triple burden of malnutrition—characterized by a high prevalence of overweight and obesity, alongside persistent undernourishment and key micronutrient deficiencies.



METHODOLOGY

ATNi's Retail Assessment 2025-2026 comprises tailored research components applied consistently across 18 retailers in six countries: the United States (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.

ATNi developed the methodology in consultation with experts in nutrition, public health, food policy, and retail, and an independent advisory group reviewed it to ensure scientific rigour 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, alongside 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 South Africa, applying the methodology to three leading retailers: Shoprite Holdings Ltd., Pick n Pay Retailers and Internationale Spar Centrale BV (ISPC). The analysis offers valuable insights into how major retailers shape food environments; however, it is limited to three national retailers and focuses primarily on private-label packaged products, excluding regional variation and the broader product offering. By applying a consistent set of indicators and analytical procedures across all six countries, the assessment generates detailed country-level insights and enables meaningful cross-country comparison within a broader global perspective on food retail and nutrition.



MAPPING THE RETAIL LANDSCAPE

Mapping South Africa’s grocery retail environment provides essential context for interpreting the broader findings of ATNi’s Retail Assessment 2025-2026. This section provides 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 South African food system.

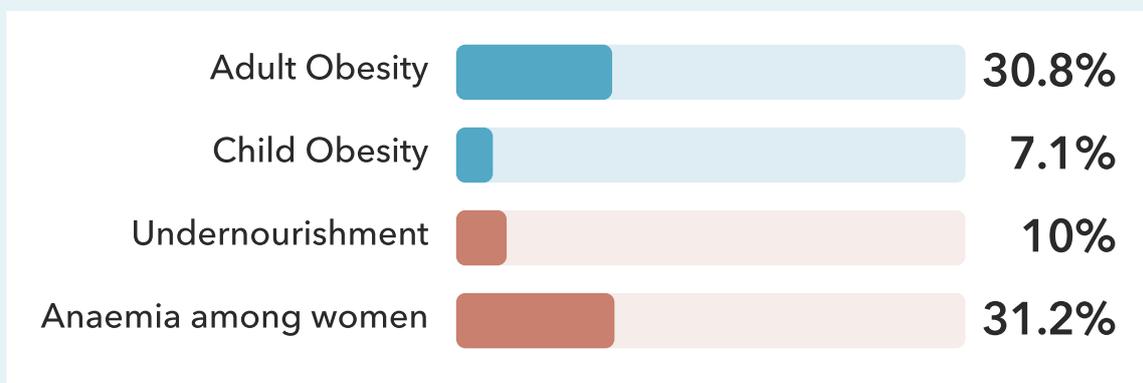
NUTRITION CONTEXT: MALNUTRITION AND DIETARY PATTERNS

The triple burden of malnutrition remains a significant public health concern in South Africa, where undernourishment persists alongside rising levels of overweight, obesity, and micronutrient deficiencies (Figure 1).⁴ Undernourishment in the general population increased from 3.3% (2004-2006) to 10.0% (2022-2024).⁵ Stunting among children under five increased from 22.1 to 24.4% between 2018 and 2024.⁶ Anaemia affected one in three women aged 15-49 years in 2023 and two-thirds of children under five in 2017.^{5,7}

At the same time, the prevalence of obesity among adults (18 years and above) increased from 28.6% to 30.8% between 2012 and 2022 and remains substantially higher than the Sub-Saharan African regional average of 11.4% (2022).^{8,10}

Women are disproportionately affected, with nearly twice as many women (67.9%) as men (38.2%) living with overweight or obesity, according to the 2023 South African National Food and Nutrition Security Survey (NFNSS).⁴ Although the prevalence of obesity among children declined slightly from 7.5% to 7.1% between 2012 and 2022, this remains higher than the African average of 4%.⁸

FIGURE 1
PREVALENCE OF DIFFERENT FORMS OF MALNUTRITION IN SOUTH AFRICA



Source: FAO and WHO ^{5,8,9}

Under- and overnutrition do not occur in isolation. Multiple studies have highlighted the double burden of malnutrition within households, where maternal obesity frequently coexists with child undernutrition.¹¹⁻¹³

Diets characterized by low fruit and vegetable consumption and increased consumption of energy-dense, nutrient-poor, processed foods have become increasingly prevalent in South Africa.^{14,15} The 2021 Global Dietary Quality Project (GDQP) survey found that only one in four (23%) adults consume all five recommended food groups.¹⁶ The NFSS 2023 similarly highlighted key gaps in the consumption of protective foods, such as vegetables and fruit.⁴ Decreased fruit and vegetable consumption has been accompanied by a sharp rise in UPF consumption since the 1990s, with notable increases in SSBs, sauces, snacks, and processed meats.^{15,a} This trend has been observed across income groups.

Among low-income groups, evidence points to reliance on low-cost processed, nutrient-poor foods and staples.¹⁷⁻¹⁹ A 2024 study of low-income adults in Cape Town found that UPFs accounted for 39.4% of total calorie intake, while only 7% met WHO recommendations for adequate fruit and vegetable consumption.¹⁷ Among higher-income households, time constraints and the employment of primary caregivers outside the home have contributed to dietary choices favouring convenience.^{20,21} As a result, higher consumption of UPF and fast or convenience foods is also observed in these groups.^{18,22}

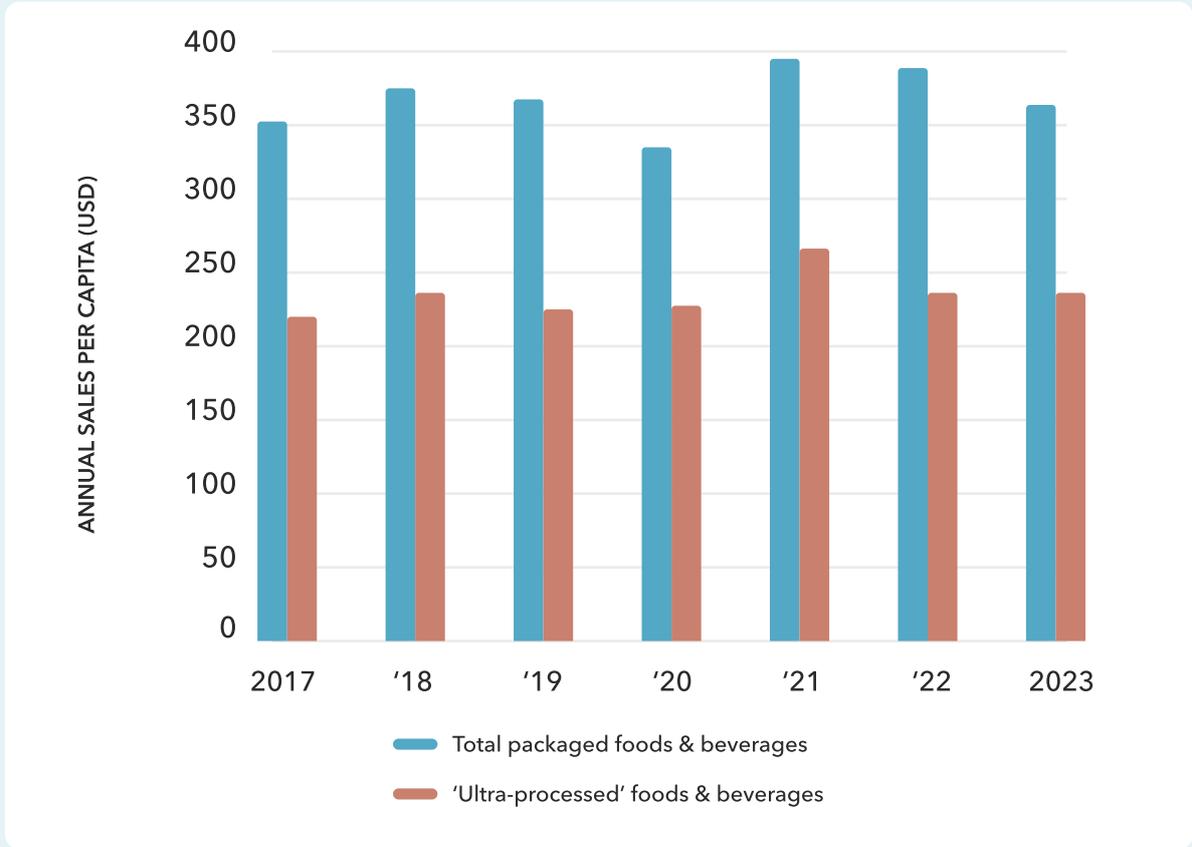
^a Defined as “foods made mostly from industrial ingredients and additives, with minimal amounts of unprocessed foods. These additives are not naturally occurring in the food but are added during processing to increase palatability and shelf life. Examples of UPFs include sweet and savoury snacks, instant noodles, confectionery, meat substitutes, and SSBs, among others.”

BOX 1 SOUTH AFRICAN GUIDELINES FOR HEALTHY EATING (2012)

First published in 2003 and updated in 2012, the South African Food-based Dietary Guidelines (FBDG) emphasize eating a variety of foods and encourage the consumption of foods lower in fat, salt, and sugar, preferably from minimally processed sources. Recommended portion sizes and guidance on the consumption of various food groups, with typical examples, are provided and form the basis of back-of-pack nutrition labelling.^{23,24} The FBDG guide the Department of Health’s nutrition communication; for example, the “South African Food Guide” serves as a visual tool to support healthier eating choices based on the FBDG.

Sales data have mirrored these trends (Figure 2). Sales of packaged foods and beverages grew at a CAGR of 2.9% between 2017 and 2024, reaching USD 25 billion, and are estimated to accelerate at a 6% CAGR until 2029. UPF consumption increased at a similar rate (2.9% CAGR) and accounted for 63.6% of total food and beverage (F&B) sales in 2023.²⁵ Average annual UPF consumption per capita in South Africa is estimated to be more than 3.5 times higher than the Sub-Saharan Africa average.²⁶

FIGURE 2
PACKAGED F&B SALES AND UPF CATEGORY GROWTH IN SOUTH AFRICA IN ANNUAL SALES PER CAPITA (USD), 2017-2023^{27,a}



BOX 2
SOUTH AFRICAN NATIONAL STRATEGIC PLAN FOR THE PREVENTION OF NON-COMMUNICABLE DISEASES, 2022-2027

This National Strategic Plan (NSP) adopts a people-centred approach to prevention and treatment of non-communicable diseases (NCDs).²⁸ The plan outlines goals to expand NCD screening and treatment, while recognizing the importance of addressing key risk factors for NCDs, including unhealthy diets, particularly among vulnerable groups such as children. The NSP identifies rising consumption of processed foods and unhealthy food environments as key contributors to the NCD burden across income groups. Proposed measures focus on improving access to healthier alternatives in key environments such as schools and workplaces. However, the plan falls short of outlining complementary policy measures, such as taxation of unhealthy foods, food labelling, and marketing regulations.

MODERN GROCERY RETAIL LANDSCAPE

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

Market overview

South Africa's modern grocery retail market is among the largest in Africa, valued at USD 42.07 billion (excluding e-commerce) (Figure 3).^{29,30} An estimated 80.2% of grocery sales take place through modern retail formats^b, in contrast to the dominance of traditional retail across Sub-Saharan Africa.

The remaining 20% of grocery sales are estimated to occur through registered, taxpaying 'small local grocers' ('traditional' formats), commonly referred to as spaza shops or kiosks.^c Actual sales through traditional channels may be higher, as some spaza shops operate informally and remain unregistered. In 2015, these outlets were estimated to number between 76,000 and 140,000.³¹⁻³³

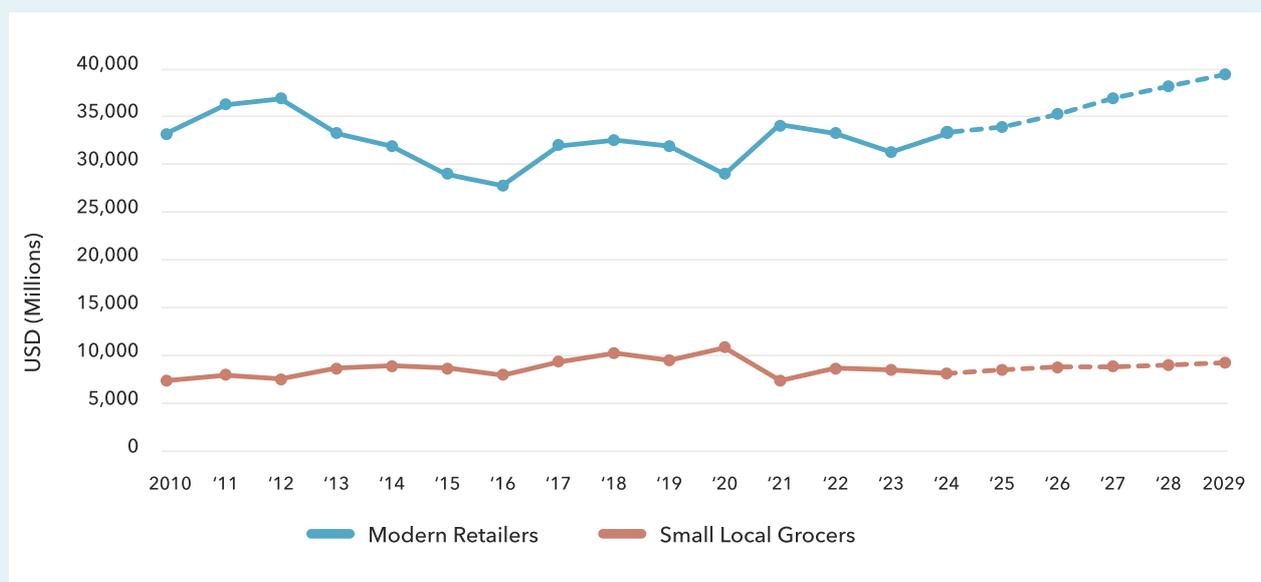
At the same time, many spazas are transitioning into the modern retail sector, both voluntarily and in response to governmental requirements.³¹ In practice, this transition can include digitization (e.g. payment methods), improved inventory management, and infrastructure upgrades, supported by initiatives such as the Spaza Support Fund and the UNDP South Africa's DIME initiative, which promotes the digitization of spaza shops.^{34,35}

The modern grocery retail sector is steadily increasing its market share, with sales projected to grow at a 3.3% CAGR between 2024 and 2029, compared to 2.2% for formally registered traditional retail (Figure 3). Since 2010, however, the modern grocery retail market has experienced significant fluctuations, largely driven by macroeconomic shocks, including slowing GDP

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

^c Spaza shops are small, typically informal retail businesses in South Africa, similar in format to tuck shops or convenience stores. They operate primarily in low-income urban areas and provide a selection of basic goods and groceries, such as drinks, cigarettes, bread and fresh produce.^{1,2}

FIGURE 3
HISTORICAL AND PROJECTED SALES GROWTH OF SOUTH AFRICA'S MODERN AND (FORMAL) TRADITIONAL GROCERY RETAIL SALES



Source: EMI data, 2010-2029

growth, currency depreciation, drought-driven food inflation, VAT increases and the COVID-19 pandemic. By contrast, the traditional grocery retail sector has shown greater resilience, with fewer fluctuations.

Retail formats

In South Africa, the supermarket channel dominates the grocery market, accounting for 55% of sales, far exceeding formats such as independently owned retailers (i.e. food, drink, and tobacco specialists) (16.7%) (Figure 4). The share of sales across modern retail channels have remained largely stable since 2017 and is expected to remain so in the coming years. Discounters are the one channel whose sales share is increasing and is expected to surpass convenience stores and hypermarkets.

- **Supermarkets:** Include chained and independent outlets with a selling space between 400 and 2,500m².³⁶ Some of the largest players are Shoprite, Spar, and Checkers (owned by Shoprite), followed by Woolworths and Pick n Pay.
- **Food/Drink/Tobacco Specialists:** Consist primarily of non-chained outlets, typically family-owned, or independently operated that are registered, tax-paying entities.
- **Convenience Retailers:** Include chained grocery outlets with extended opening hours and a selling area of less than 400m². Example brands include 7-Eleven and Spar.
- **Hypermarkets:** Typically have a selling space of over 2,500m² and focus on selling both grocery and non-grocery merchandise. Major players include Checkers (Shoprite), Pick n Pay, and Game (Walmart).
- **Discounters:** Chained retail outlets typically between 400 and 2,500m² in size, focusing on a limited product range at budget prices, often supported private-label lines. Examples include Shoprite's Usave and Pick n Pay's Boxer.

FIGURE 4
SHARE OF MODERN GROCERY MARKET BY RETAIL CHANNEL



Source: EMI data, 2024.

BOX 3 THE GROWING ROLE OF E-COMMERCE

Grocery e-commerce in South Africa has grown rapidly in recent years, with a CAGR of 47% between 2017 and 2024, reaching a value of USD 833.4 million—nearly 15 times higher than in 2017. The most pronounced expansion occurred in 2018 (76%), 2020 (87%), and 2021 (67%), with growth in the latter two years likely accelerated by COVID-19 lockdowns. Despite this rapid growth, e-commerce still represents a relatively small, but growing, share of the total grocery retail market, rising from 0.1% in 2017 to 1.9% in 2024.³⁷

This expansion has been driven by greater smartphone and internet penetration, faster and more reliable delivery services, streamlined payment processes, and heightened market competition.^{38,39} Retailers such as Checkers (Sixty60), Pick n Pay (Mr D), and Woolworths (Dash) have expanded one-hour delivery services and improved fulfilment capabilities, successfully converting customer trials into regular shopping practices.

Current users are predominantly urban residents with middle to higher incomes, aged 25–44 years, although adoption is gradually widening to other consumer groups.^{39,40}

Geographic distribution and access

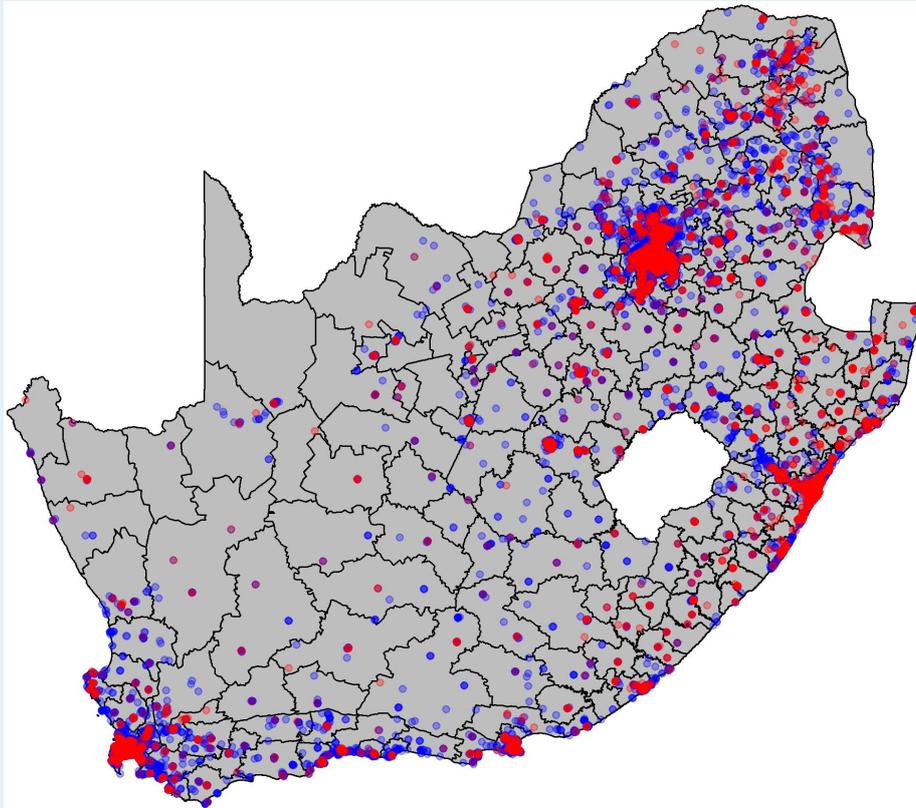
The density of supermarkets in South Africa far exceeds that of other Sub-Saharan African countries. According to Euromonitor, in 2023 there were 4.9 supermarkets per 10,000 people—almost four times the Sub-Saharan African average.⁴¹ These stores are most densely concentrated in South Africa's largest cities, particularly within high- and middle-income neighbourhoods (Figure 5).⁴²

However, since the 1990s, major retail chains, such as Shoprite and Boxer, expanded into rural and lower-income urban areas that were previously without supermarkets (Box X).^{42,43} Although retailers have become more present in lower-income neighbourhoods, the poorest parts of cities remain underserved. For example, a 2014 Cape Town mapping study of supermarkets found 2.5 times as many USave (discounter) stores per household in the second lowest-income quintile neighbourhoods compared with the lowest income quintile.⁴²

Shopping malls have facilitated this expansion, with municipalities promoting shopping malls as tools for economic upliftment in low-income areas.⁴⁴ These malls often feature major retailers and fast-food outlets as anchor tenants, increasing access to processed and fast foods, alongside healthier food options.^{44,45} In addition, higher footfall around shopping centres in lower-income areas has attracted informal fruit and vegetable traders.

Supermarkets have also become more accessible in urban settings through their location on or near main roads and transport hubs.⁴⁶ The 2014 Cape Town study found that almost three-quarters of supermarkets were within 200m of a main road, with many situated near taxi ranks, bus stops, and stations. These are important access points for low-income consumers, who are more likely to shop outside of their neighbourhoods.^{47,48}

FIGURE 5
SPATIAL DISTRIBUTION OF SUPERMARKETS AND FAST-FOOD OUTLETS IN SOUTH AFRICA



Source: Otterbach et al., 2021, without modification.³⁰

Note: red dots denote supermarkets and blue dots denote fast food outlets.

BOX 4 ORIGINS AND DEVELOPMENT OF THE SOUTH AFRICAN GROCERY RETAIL SECTOR POST-APARTHEID

The early rise in supermarket presence was rooted in apartheid-era economic planning, which supported the development of highly formalized retail structures serving primarily white urban areas.⁴⁹

Post-apartheid trade liberalization and the removal of zoning restrictions enabled established retail chains to expand into lower-income urban areas, previously served mainly by informal vendors and spaza shops. At the same time, growth in the middle class and rising disposable incomes further supported retailer expansion, while also intensifying competition between retail chains.^{43,46} In response, retailers acquired and developed new trading brands and store formats to target different consumer markets. Among upper-income consumers, this included, for example, the rise of the premium grocery chain Woolworths. Conversely, major retailers, such as Shoprite and Boxer, led expansion into urban low-income neighbourhoods, seeking to distinguish themselves from competitors.^{42,43}

CONSUMER BEHAVIOUR AND PREFERENCES

SOCIO-ECONOMIC DIMENSIONS

Geographic disparities in retail outlets mirror differences in visit frequency, purchase volumes, and preferences across socio-economic groups.

Lower-income households typically use supermarkets for weekly or bulk monthly purchases of non-perishable staples, often timed around social grant disbursements.^{42,51,52} These grants can be used at major retailers, such as Shoprite, Pick n Pay and Pick n Pay's Boxer (Box 5).^{42,53} Bulk purchases are complemented by smaller, more frequent purchases from informal outlets such as spaza shops, street vendors, or kiosks.⁵² Factors such as access to adequate storage, refrigeration, and cooking facilities also play a key role in shaping shopping patterns, as well as the consumption of convenience, or shelf-stable processed foods.⁴⁷

BOX 5 POLICY: SOUTH AFRICAN SOCIAL SECURITY AGENCY (SASSA) GRANTS

SASSA, as a national agency, provides grants to vulnerable and low-income groups through the Child Support, Disability, Older Persons, and the Social Relief of Distress (SRD) grants. These grants are disbursed monthly via the SASSA electronic benefits card.^{42,44,50} The cards allow withdrawals from SASSA-affiliated ATMs and can be used as a debit card to pay for groceries or withdraw cash at major retailers (e.g. Pick n Pay, Checkers, Shoprite, Spar, or Boxer).⁵⁴ This system represents a shift away from grant collection at community points such as post offices.

While this transition has at times improved convenience for consumers, it has also influenced retailer-led promotions. Retailers in low-income neighbourhoods promote discounted 'hampers'—typically consisting of refined white or maize flour, sugar, oil, and bread—around grant disbursement days and month-end paydays.⁵⁵

Low-income consumers source both highly processed HFSS foods and healthier items from formal retailers. A 2019 Cape Town study found that nearly all households purchased highly processed meat, sugar, and legumes from formal retailers.^{19d} While 55% sourced fruit and vegetables from formal retail, more than 30% purchased these items from mobile or fixed stalls. Sugary drinks and packaged bread were primarily purchased from informal stores, with only 15% and 26% of households, respectively, purchasing these products from formal outlets.¹⁹

Higher-income groups, by contrast, shop almost exclusively at formal retailers, such as supermarkets, for both daily shopping purchases and weekly shopping of non-perishable staples.^{46,50} Despite greater access to healthier and higher-quality options, higher-income consumers frequently purchase less healthy snacks and SSBs.⁴⁷ A 2021 study of 395 Cape Town shoppers revealed that consumers in high-income neighbourhoods purchased snacks (74.6%) and SSBs (66.2%) at rates equal to or higher than fruits and vegetables (54.9% and 66.2%, respectively). Additionally, ultra-processed and imported products may be perceived as symbols of social status, prompting purchases of more expensive, though not necessarily healthier, items.^{47,57}

^d In the 2019 Cape Town study, 'formal retail' in South Africa was defined as wholesalers/ distributors, supermarkets or general dealers, typically with a floor space of larger than 200m² and facilities for refrigeration, card payments, electronic inventory management, and often corporate ownership or branding.¹⁹

MARKET STRUCTURE & RETAILER CHARACTERISTICS

Market concentration and competition

The modern grocery retail sector in South Africa is moderately concentrated, with a Herfindahl-Hirschman Index (HHI) score of 1,766.8 (out of 10,000) in 2024.^e

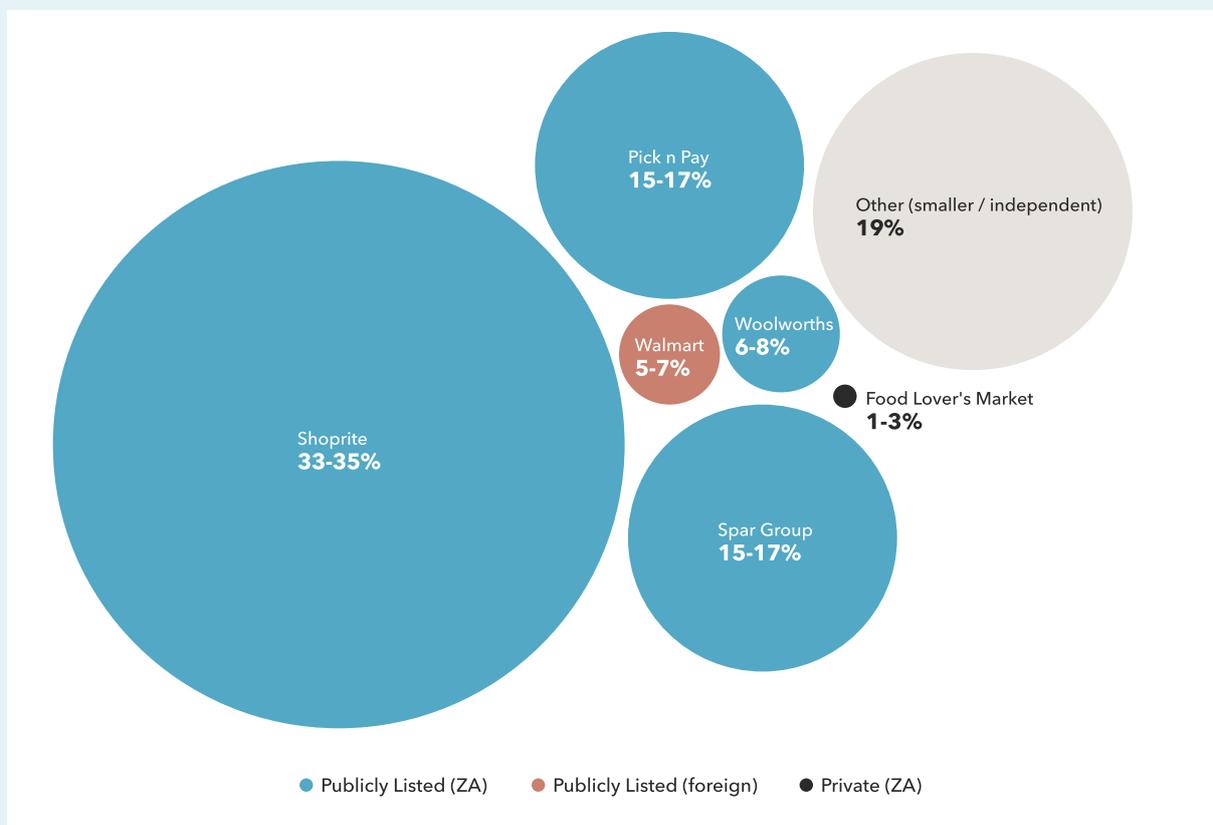
The three largest retailers—Shoprite, Pick n Pay, and Spar—account for over 66% of the market (Euromonitor International; Figure 6). Shoprite, the largest retailer, represents 33-35% of grocery sales, more than double the share of Pick n Pay and Spar. Woolworths and Massmart (50% owned by Walmart) together represent approximately 13%. A further nine companies operate modern grocery chains in South Africa, while modern independent outlets account for approximately 16% of sales.

Market concentration has steadily increased since 2015, largely due to Shoprite’s expanding market share, while Pick n Pay’s share of the supermarket segment has declined. Notably, Pick n Pay’s Boxer stores lead the growing ‘discounter’ segment, where they compete with the comparatively smaller Usave (Shoprite).

Despite substantial market concentration, the share of grocery sales made through chain stores decreased slightly from 80% to 74% between 2009 and 2023.⁵⁸ This may reflect the entry of new and non-chain retailers into the South African landscape, as well as the resilience of informal retail channels.

^e 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 values.

FIGURE 6
MAJOR SOUTH AFRICAN GROCERY RETAILERS BY MARKET SHARE AND OWNERSHIP TYPE



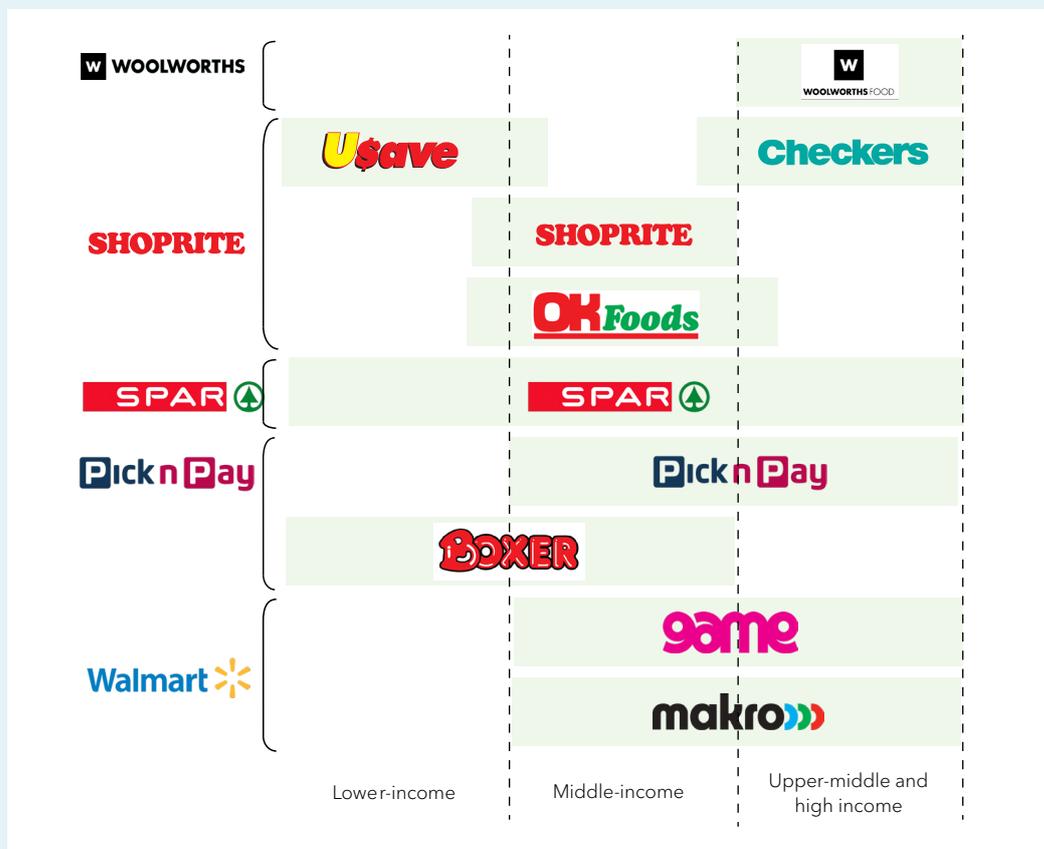
Source: EMI data, 2024

BOX 6 RETAILERS AND CONCENTRATION ACROSS THE SUPPLY CHAIN

Concentration of retailers has increased suppliers' dependence on a small number of supermarket chains. According to Trade Intelligence and the Competition Commission, national supermarket chains account for more than half of many suppliers' revenues, making them essential commercial partners.⁴⁶ However, to secure shelf space within these major retailers, suppliers must pay high rebates (basic fees). These costs are often passed on through higher selling prices, which can disadvantage smaller or independent retailers that must purchase goods at these higher prices. This practice also places smaller suppliers at a disadvantage, as many cannot afford the substantial fees required to access national retail chains, limiting their market participation and competitiveness.

As shown in Figure 7, major retailers and their trading brands compete across different income levels in South Africa. Woolworths and Checkers (owned by Shoprite) focus on the small but lucrative higher-income segment: the top 10% of earners who represent 44% of per capita expenditure, competing with Pick n Pay, Game, and Makro.^{50,59} Most retail brands target the middle-income segment, where the middle-50% of earners represent 47% of per capita expenditure.⁵⁹ Only the discounters Boxer and Usave, as well as Spar, target the lowest-income segment, where the bottom 40% of earners account for just 9.4% of per capita expenditure.⁵⁹ This group also relies on traditional spaza shops for grocery purchases.⁵⁰

FIGURE 7
RETAILERS' TRADING FORMATS TARGET DIFFERENT INCOME SEGMENTS



Source: Masojada, 2021⁵⁰

Today, the South African retail landscape remains highly competitive, and major retailers are making use of several strategies to attract customers, take advantage of consumption trends, and grow market share.^{60,61} These strategies have focused on making packaged food more available (e.g. through expanding into low-income neighbourhoods and rural areas), enhancing affordability (e.g. offering lower price points than traditional retail), and increasing product appeal (e.g. through marketing).

Retailer ownership characteristics

Most leading grocery retailers in South Africa are domestically headquartered, with notable exceptions including Spar and Massmart (50% owned by Walmart, US). This pattern of local ownership reflects the legacy of apartheid, during which international sanctions isolated South African firms' participation from global markets. Consequently, many companies channelled

surplus capital into scaling up national infrastructure and supply chains.⁶² Apartheid-era legislation and zoning policies further entrenched highly formalized retailer systems serving predominantly white urban communities. As a result, South African-based retailers faced fewer financial and logistical barriers when expanding operations within South Africa and into other African markets following the end of apartheid in 1994 and subsequent trade liberalization.⁶²

All major retailers are publicly listed. While Shoprite and Pick n Pay originated as family-owned enterprises, both transitioned to public listings to access capital for growth—a common strategy in South Africa's competitive retail sector. In some cases, such as Pick n Pay, founding families retained majority control post-listing. The Ackerman family, founders of Pick n Pay, maintained a controlling stake until 2024, when they relinquished majority ownership after a decade of weak financial performance.⁶³

BOX 7

OPPORTUNITY FOR GOVERNMENT TO INFLUENCE RETAILERS' PRACTICES

The South African government holds the largest institutional ownership stake in SPAR South Africa (22.82%) and Shoprite Holdings (19.59%), through the Public Investment Corporation Limited (PIC).^{64,65} The PIC also holds a minority stake in Pick n Pay (18%), while the founding Ackerman family retains a majority shareholding (25%).⁶⁶

In theory, this provides the government with considerable influence over retailers' policies and practices. The PIC Annual Report states a focus on health as part of its assessment of social issues and includes a requirement in its ESG strategy, including consideration of the Sustainable Development Goals such as Zero Hunger and Good Health and Well-Being.⁶⁷ The PIC also is a member of UN Principles for Responsible Investment (UNPRI) and the UN Global Compact (UNGC) that values ESG and responsible investing.⁶⁷

However, PIC's stakes in these retailers have not been combined with efforts or criteria to influence healthiness or affordability of supermarket portfolios. The government has a great opportunity to ensure retailers embed nutrition into their policies and practices, including by driving retailers to improve the healthiness of their portfolio.^{67,68}

Governance and management of stores

South Africa's major retailers operate through corporate ownership and centralized control, as well as franchise models.

Shoprite, the country's largest retailer, has focused less on franchising and more on targeting a range of income groups, operating multiple trading brands and store formats, which are supported by its advanced centralized distribution system.⁶⁹ Nonetheless, the group owns OK Franchise, which focusses on wide geographic reach.⁷⁰

However, for other prominent retailers, including Spar and Pick n Pay, franchising represents an important strategy. Franchising was pioneered in South Africa by SPAR, through its centralized model that provides franchisees with access to logistics and distribution systems, branding and marketing, and central support in areas such as finance and human resources.⁷¹ Pick n Pay has also pursued franchising, offering independent store owners access to its distribution network while requiring adherence to established brand standards and operating procedures.^{72,71}

Franchising is expected to expand further in the coming years. A survey by Boston Consulting Group found that 60% of independent retailers expressed interest in joining the modern grocery retail sector by becoming formal convenience franchises.⁷³ This trend suggests that many traditional spaza shops could transition into more formalized retail channels. These developments are supported by retailers' integrated wholesaling functions, which enable direct procurement from suppliers and distribution through their own networks of distribution centres.⁷⁴

KEY INSIGHTS SOUTH AFRICA RETAIL FOOD ENVIRONMENT

South Africa's grocery retail environment is characterized by a mature and highly formalized structure. Modern retail formats dominate, accounting for over 80% of grocery sales, with supermarkets representing the largest share. This dominance reflects early supermarket penetration and sustained investment in centralized supply chains, which enabled major retailers to expand into low-income urban and rural areas historically reliant on less formal forms of retail. Shopping malls have facilitated penetration into lower-income zones, although these environments often promote processed and fast foods alongside healthier options.

Due to this uneven expansion, significant differences in shopping patterns and access persist across income groups. Among low-income consumers, supermarkets play an important role in weekly to monthly purchases of non-perishables, with informal retail—including spazas and street vendors—playing a critical role for smaller, day-to-day purchases. High-income neighbourhoods, by contrast, exhibit denser supermarket coverage, and consumers predominantly rely on formal retail for daily purchases. Although retailers target high-income consumers through trading brands which place a stronger emphasis on 'fresh offerings', frequent purchases of convenience foods, snacks, and SSBs reflect pervasive nutrition transitions across income groups. E-commerce is growing rapidly driven by consumers' demand for convenience, but usage remains skewed toward urban, higher-income consumers.

Although the South African grocery retail market is moderately concentrated, competition between retailers remains intense. Retailers target different income segments through differentiated store formats, including discounters (e.g. Pick n Pay's Boxer) and premium chains (e.g. Shoprite's Checkers). Notably, the South African government's PIC is among the largest institutional investors in Shoprite, Spar, and Pick n Pay, highlighting opportunities for the South African government to influence retailers' nutrition policies and practices.



RETAILER PROFILES

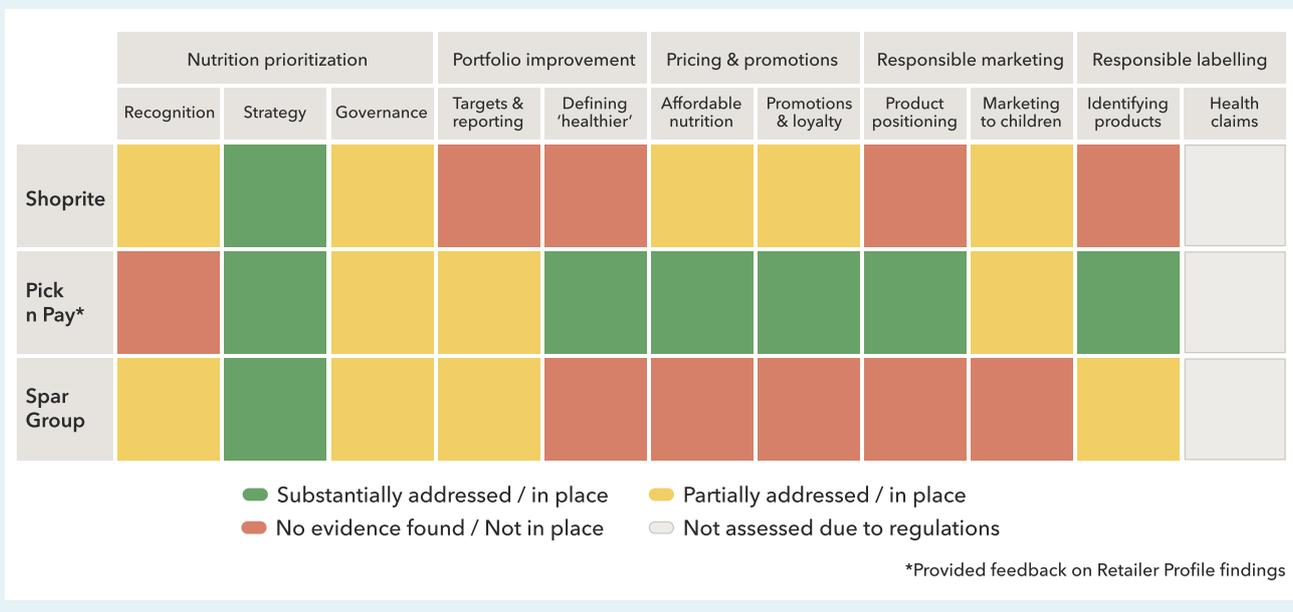
The Retailer Profile qualitatively assesses the extent to which the three selected retailers—Shoprite, Pick n Pay, and Spar Group—engage with nutrition, embed it within their commercial practices, and take steps beyond regulatory requirements to support healthier consumer diets. This assessment draws primarily on publicly available information. Although each company was invited to review the findings and provide additional evidence, only Pick n Pay chose to do so.

OVERALL FINDINGS

All three retailers incorporate nutrition within their wider ESG or sustainability strategies, though the depth and clarity of these commitments vary. As shown in Figure 8, Pick n Pay has the most developed

approach to nutrition. The retailer has strategies in place to incentivize the purchase of healthier options through pricing, promotions, loyalty mechanisms, in-store product positioning, and clear front-of-pack labelling, as well as a system for defining ‘healthier’ products.

FIGURE 8
RETAILER PROFILE FINDINGS PER NUTRITION TOPIC AREA^f



^f In interpreting Figure 8, it is important to note that the green colour indicates areas that are substantially addressed or in place; however, this classification does not imply that performance is optimal, or that no further improvement is possible.

In comparison, while Shoprite and Spar Group have introduced some relevant initiatives and commitments, their approaches remain less developed and fall short of Pick n Pay's level of breadth and implementation across these areas. Pick n Pay also has significant scope to improve its transparency across a range of nutrition-related topics.

IN-DEPTH FINDINGS

NUTRITION PRIORITIZATION & GOVERNANCE

Addressing and prioritizing nutrition

Across all three retailers, nutrition-related risks—such as the potential business impacts of changing consumer preferences, increasing health consciousness, and possible future regulatory requirements—receive limited recognition within their public enterprise risk registers. Only Shoprite explicitly identifies consumer health and nutrition as a material issue, while Spar Group specifically identifies food security in vulnerable communities in its 2024 'Double Materiality' assessment.

Despite this limited formal recognition, all three retailers position nutrition within their broader ESG agendas. Their strategies generally focus on improving the health profile of private-label ranges and expanding 'fresh' offerings, including fruits and vegetables. Pick n Pay's approach is more developed, extending beyond product reformulation and range expansion to include mechanisms that actively encourage healthier purchasing—such as promotional incentives and transparent FOP labelling.⁷⁵

Nutrition governance and accountability

All three retailers disclose the governance arrangements for their broader sustainability or ESG strategies, within which nutrition is addressed, rather than outlining governance arrangements specific to nutrition as a standalone area requiring tailored oversight. In each case, executive-level roles hold formal responsibility for implementing the sustainability or ESG agenda, with both Pick n Pay and

Spar Group's CEOs directly involved. Only Pick n Pay provided additional information to ATNi on dedicated accountability for its nutrition strategy, indicating that responsibility sits with a senior manager below executive level.

Each retailer subjects its sustainability/ESG strategy to oversight by Board subcommittees. Pick n Pay further noted that its nutrition lead provides regular progress updates to the relevant Board committee.

Nevertheless, none of the retailers currently link executive remuneration to nutrition-related KPIs, suggesting that nutrition is not yet viewed as a performance-critical area across the sector.

NUTRITION TARGETS, REPORTING & APPROACH

Nutrition targets and reporting

Despite broad commitments to improving the nutritional quality of their private-label portfolios, none of the retailers have set clear, specific, and time-bound nutrition targets. Nor do they provide consistent or transparent reporting, limiting the ability to assess progress or evaluate the scale of their commitments.

Pick n Pay reported the removal of 1,000 tonnes of salt and 2,500 tonnes of sugar from its portfolio between 2017 and 2023, suggesting some reformulation activity. However, without disclosure of a baseline, total nutrient levels over time, or clarification of how and in which products or categories these reductions were achieved, the significance of these reductions cannot be assessed. Internal policies shared with ATNi point to ongoing reformulation intentions, including requirements for private-label products to remain below benchmark nutrient levels, yet the absence of public metrics or targets limits external accountability.

The Spar Group has adopted a KPI—"% difference of SPAR Brand products vs market leader with regard to healthier recipes and made from sustainable sources"—and commits to tracking recipe changes, particularly those implemented voluntarily. Yet the KPI lacks clarity: no methodology, baseline, target value, or timeframe is provided, and the company has not yet reported progress.

Importantly, none of the three retailers have set targets to increase the proportion of sales derived from products meeting a 'healthier' threshold under a NPM, nor do they disclose sales data for such products. This omission restricts understanding of how nutrition strategies translate into measurable market outcomes.

Defining 'healthier' products

Only Pick n Pay has a system in place to classify 'healthier' products using an NPM. No evidence was found that either Shoprite or Spar Group uses such a system to guide commercial practices.

Pick n Pay classifies private-label products as 'healthier' if they qualify for its 'LiveWell Club' logo. The retailer informed ATNi that products qualify if they meet the healthy threshold of the proposed South African NPM, a version of the WHO Regional Office for Europe NPM adapted by South Africa's National Department of Health (NDoH)—but not yet formally adopted—alongside additional category-specific criteria regarding salt, sugar, and saturated fat content. These criteria are not publicly available, however. Fresh and frozen fruits and vegetables automatically qualify as 'LiveWell Club' products.

BOX 8 POLICY: DRAFT R3337 PROFILING MODELS FOR NUTRITION AND HEALTH CLAIMS AND FRONT OF PACK LABELLING (2023)

The draft NPM for Health and Nutrition Claims, released in January 2023, is designed to serve as screening criteria for the eligibility of foods to make health or nutrition claims, based on the overall healthiness of a product. The model is used to establish an overall score of the healthiness of a food, through adding points for nutrients of concern and subtracting points for positive nutrients). In addition, Draft regulation R3337 proposes nutrient cut-off values for total sugar, sodium, and saturated fatty acids, which would require companies to display FOP warning labels if surpassed, and on any products with added artificial sweeteners. According to the proposed regulation, foodstuffs that are required to carry a FOPL are prohibited from also making energy, nutrition or health claims.⁷⁶

PRICING AND PROMOTIONS FOR HEALTHIER PRODUCTS

Affordability of healthier products

All three companies position affordability as central to their commercial models—whether through discount store formats, private label ranges, or frequent promotions.

Pick n Pay stands out for more directly integrating affordability into its nutrition strategy. For example, it offers price promotions and loyalty rewards for 'LiveWell Club' products and requires all items in its low-cost No Name range to meet LiveWell criteria. Beyond this, explicit commitments by the three retailers to making 'healthier' products affordable are limited, and there is little evidence of systematic efforts or reporting in this area.

Each company also highlights efforts to reach lower-income and rural consumers through discount or convenience formats—including Boxer and the spaza partnership model (Pick n Pay), Usave (Shoprite), and rural Spar and SaveMor stores. However, none provides information on whether healthier products are intentionally included or prioritized within these channels.

Price promotions & loyalty rewards

Of the three retailers, only Pick n Pay was found to systematically use price promotions and loyalty mechanisms to incentivize healthier purchases. The retailer offers a 15% discount on most frequently purchased 'LiveWell Club'-approved products and awards customers with triple 'Smart Shopper' points as part of its loyalty program, redeemable on any item. Fresh produce and poultry are actively promoted each week, including through weekly 'Market Day' deals featuring discounted bulk deals on fresh produce.

Some evidence was also identified for Shoprite. Discovery Bank and Vitality Insurance customers can receive up to 75% cashback on healthy food purchases at Checkers and Sixty60 stores through the 'Discovery Vitality Healthy Food programme'. However, the scope of eligible products, the number of participating customers, and the duration of the initiative remain unclear.

For Spar Group, no evidence was found of a policy or initiative that systematically provides price promotions on healthier products or uses loyalty mechanisms to incentivize healthier purchases.

RESPONSIBLE MARKETING

In-store marketing & product positioning

Pick n Pay is the only retailer found to have a clear initiative to shift product positioning in favour of healthier options within its stores. No evidence was identified indicating that these initiatives extend to Pick

n Pay's Boxer trading brand. Furthermore, no comparable evidence was found for Shoprite or Spar Group.

Pick n Pay reported to ATNi that it has implemented "healthier fair queue aisles" across selected stores since 2020. These aisles limit sweets, chocolates, and SSBs to no more than 25% of checkout offerings and ensure that over half of displayed items are either healthier choices or non-food products. The company also shared internal evidence describing broader commitments to expand 'better-for-you' options in snack aisles and checkout areas.

BOX 9

INDUSTRY SELF-REGULATION OF MARKETING TO CHILDREN: CONSUMER PROTECTION ACT (2008) AND ADVERTISING REGULATORY BOARD (ARB)

The Consumer Protection Act (2008) provides the legal framework for ensuring that marketing materials do not mislead consumers. Although children are defined as a vulnerable group, the Act does not specifically prohibit the marketing of unhealthy products to children. Addressing misleading practices is largely undertaken through industry self-regulation via the ARB, which enforces the Advertising Code of Practice (2008). This voluntary code defines children as under 12 years of age and applies primarily to channels such as television and radio, excluding most digital marketing. The South African Consumer Goods Council similarly maintains a voluntary Responsible Marketing to Children Pledge (2009) with guidelines for marketing to children under 12 years.⁷⁷

Major retailers, such as Pick n Pay, F&B manufacturers, and fast food chains are among some of the primary funders of the ARB and represent some of the country's largest advertisers. MarkLives (Nielsen), an independent industry news organization, reported that Shoprite was the second-largest advertiser by spend in the first quarters of 2022 and 2023.⁷⁸ Pick n Pay ranked seventh in advertising expenditure in September 2022.⁷⁹

Responsible marketing to children

Both Pick n Pay and Shoprite have publicly committed to the ARB's Code of Advertising practice. In addition to articulating general commitments to responsible advertising, the Code includes the 'Food & Beverage' appendix containing specific restrictions relating to marketing to children (see Box X). Pick n Pay has gone further by also signing the South African Consumer Goods Council's Responsible Marketing to Children Pledge (2009).⁷⁷ No documented evidence of a comparable responsible marketing commitment was identified for Spar Group.⁷⁷

BOX 10

DRAFT R3337 AND RESTRICTIONS ON MARKETING TO CHILDREN

FOP warning labels can influence consumer purchasing behaviours. When implemented on a mandatory basis, they may also shape retailers' decisions regarding product promotion. Under Draft R3337, pre-packaged foodstuffs will be required to display a mandatory FOP warning label if they contain added saturated fat, sugar or sodium exceeding specified nutrient cut-off values. The regulation also outlines various requirements on the placement of the logo on different package sizes. Products required to display the FOP warning labels are deemed unsuitable for advertising to children and have restrictions on their advertising applied accordingly.⁷⁶ Importantly, these regulations will apply to children under 18 years of age, in line with WHO and UNICEF recommendations of marketing to children.^{80,81}

RESPONSIBLE LABELLING

Evidence indicates that some retailers are taking steps beyond regulatory requirements to help consumers identify healthier and less healthy products through labelling. Pick n Pay and Spar Group both report displaying GDA icons on food packaging for key nutrients of concern—an approach that exceeds current labelling regulations, though it remains non-interpretive.

Pick n Pay goes further by applying its LiveWell Club logo to private-label products that meet defined nutrition criteria, providing a simple, front-of-pack

signal of healthier choices across both in-store and online channels.

By contrast, no evidence was found that Shoprite uses additional labelling beyond regulatory requirements to help consumers distinguish healthier products.

MISSED OPPORTUNITIES FOR NUTRITION LEADERSHIP

Although the three leading South African retailers assessed recognize nutrition within their corporate strategies, there is limited evidence that these commitments translate into measurable nutrition outcomes. Transparency and accountability across the sector remain limited. None of the retailers have set public targets to increase healthier product sales or to reformulate their private-label portfolio, and none report on sales-weighted nutrition performance.

Despite Shoprite's significant reach—double the market share of both Spar and Pick n Pay—little evidence was found of their efforts to define healthier products using a NPM. While their Discovery Vitality programme provides discounts on healthier products—it is limited to members of Discovery Bank's Vitality insurance programme, which may primarily target higher-income consumers. No publicly available evidence was identified for similar savings programmes designed to improve access to healthier products within store formats targeting lower-income consumers.

Pick n Pay showed a more developed approach, applying their LiveWell logo to healthier private label products. This was complemented by price promotions and loyalty mechanisms, such discounts on LiveWell private label products within their Smart Shopper programme.

Commitments to responsibly marketing to children is a gap across all retailers. Although Shoprite and Pick n Pay are part of an industry self-regulatory pledge through the ARB or the South African Consumer Goods Council, these pledges fall far short of WHO recommendations.



PRODUCT PROFILE

Retailers play a key role in shaping food environments through their private-label portfolio, which influences what consumers can access and afford. ATNi's Retail 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 approach enables cross-country comparisons and highlights opportunities for product reformulation, innovation, and diversification within national retail landscapes.

This chapter presents the results for South Africa, focusing on the nutritional quality of the private-label portfolios of three of the largest grocery retailers: Shoprite (incl. the private-label products sold by Checkers and Usave), Pick n Pay, and Spar. The results for South Africa—as well as for all other countries included in the assessment—can also be accessed through [ATNi's interactive Dashboard](#).

Scope and Methods

The Product Profile assesses the private-label portfolios using standardized per 100g/mL nutrient data from Innova Market Insights, with limited company verification (i.e. only Pick n Pay provided feedback on the original dataset). 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.

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

BOX 11

OVERVIEW OF NUTRIENT PROFILE MODELS AND APPROACHES

Healthiness was evaluated using three internationally recognized NPMs, and one draft national NPM:

- HSR; products scoring ≥ 3.5 classified as 'healthier'.
- Nutri-Score (A-E); with the healthier A+B and A+B+C results reported.
- HFSS+colours/flavours/NSS approach; flags products high in nutrients of concern (HFSS; high in added saturated fat, sodium, and sugar) and those containing three types of 'cosmetic' additives considered UPF markers, namely: colourants, flavours, and NNS.⁸²
- South African NPM, a version of the Chile 2019 NPM adapted by researchers for use in South Africa.⁸³

The three international models were applied to ensure cross-country comparability.

For further details on these NPMs, see ATNi's Retail Assessment [Scope and Methodology document](#).

KEY FINDINGS

This section provides an overview of the nutritional quality of private-label portfolios across the three South African retailers (Table 1). It compares these results with global averages across all countries included in the Retail Assessment and over 1,300 (multi-)national brand products assessed in ATNi's [Global Index 2024](#), representing 13 global food manufacturers..

TABLE 1
PRODUCT PROFILE RESULTS ACROSS FOUR NPMS

NPM	Assessment criteria	Retailer			
		Shoprite	Pick n Pay	Spar	South Africa Overall
HSR	Mean HSR	2.7	2.7	2.3	2.6
	% healthier	41%	38%	28%	37%
	Total products	1324	1412	760	3496
Nutri-Score	% healthier (A+B)	23%	22%	14%	21%
	% healthier (A+B+C)	46%	46%	32%	43%
	Total products	1290	1404	759	3453
HFSS and/or colours/flavours/NNS	% products considered healthier	88%	84%	91%	87%
	Total products	1325	1423	758	3506
SANPM	% eligible	32%	32%	22%	30%
	Total products	1327	1424	759	3510

MEAN HEALTHINESS OF RETAILER'S PRIVATE-LABEL PORTFOLIOS USING:

SANPM

Using the proposed South Africa NPM, an average of 30% of products across the three retailers were classified as 'healthier': 32% for Shoprite and Pick n Pay, and 22% for Spar. Product categories with the highest proportion of healthier items included flour (92%), rice, pasta and noodles (83%), and processed fruit and vegetables (75%). Categories with the lowest proportion of healthier products included Asian specialty drinks, concentrates, energy drinks, ice cream, other hot drinks, and ready-to-drink coffee and tea, all with 0% classified as healthier.

HSR

The mean HSR across the three South African retailers (3,496 products) was low at 2.6 out of 5. The mean HSR was 2.7 for Shoprite, 2.7 for Pick n Pay, and 2.3 for Spar. Compared with [retailers in other countries included in this assessment](#), South African retailers show similar mean HSR values to those observed in the US with a mean HSR of 2.7 (7,687 products in total), France with a mean HSR of 2.7 (8,324 products), and the overall cross-country mean HSR of 2.7 (19,940 products).

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

HSR

Across the three South African retailers, 3,496 private-label products were analyzed using the HSR system. Of these, 37% (1,295 products) met the 'healthier' threshold (HSR ≥ 3.5), below the overall assessment average of 41% (8,253 out of 19,940 products). Meanwhile, 43% (1,486 products) of South African private-label products assessed scored 2 stars or below, and 14% (489 products) received the lowest rating of 0.5 stars. Shoprite had the highest proportion of 'healthier' private-label products (41%), followed by Pick n Pay (38%), and Spar (28%).

Nutri-Score

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

- A+B threshold: 22% of Pick n Pay products, 23% of Shoprite products, and 14% of Spar products meet this definition of healthier.
- A+B+C threshold: 46% of Pick n Pay products, 46% of Shoprite products, and 32% of Spar products meet this definition of healthier.

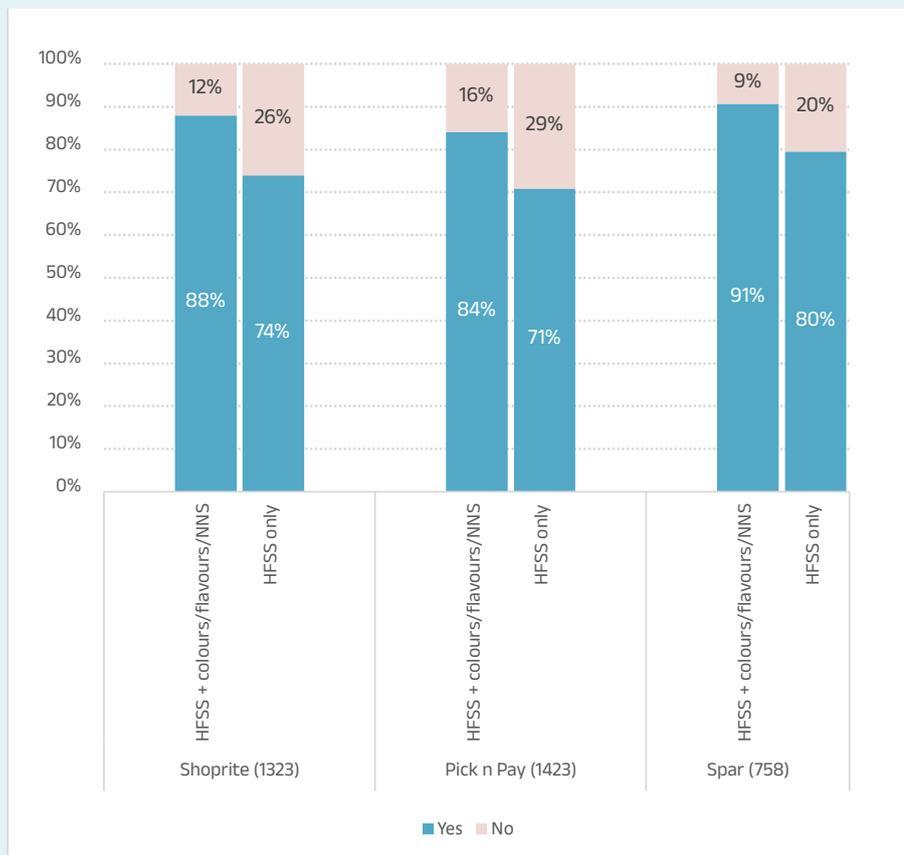
Across the Nutri-Score letter grades, Pick n Pay and Shoprite had the highest proportion of products rated 'A' (Pick n Pay 13%, Shoprite 13%, Spar 9%), while Pick n Pay has the lowest proportion of products rated 'E' (Pick n Pay 25%, Shoprite 28%, Spar 40%).

PROPORTION OF PRIVATE LABEL PORTFOLIO CONSIDERED UNHEALTHY USING:

The HFSS and/or colours/flavours/NNS approach

When assessed using a combined approach—identifying HFSS products and those with UPF markers (colourants, flavours, or NNS)—almost all private-label products were classified as ‘unhealthy’ (87%). This is in line with the six-country average (86%). Among the three retailers, the proportion classified as unhealthy was 88% for Shoprite, 84% for Pick n Pay, and 91% for Spar.

FIGURE 9
PROPORTION OF PRODUCTS CLASSIFIED AS HFSS AND/OR CONTAINING COSMETIC ADDITIVES (COLOURS, FLAVOURS, NON-NUTRITIVE SWEETENERS)



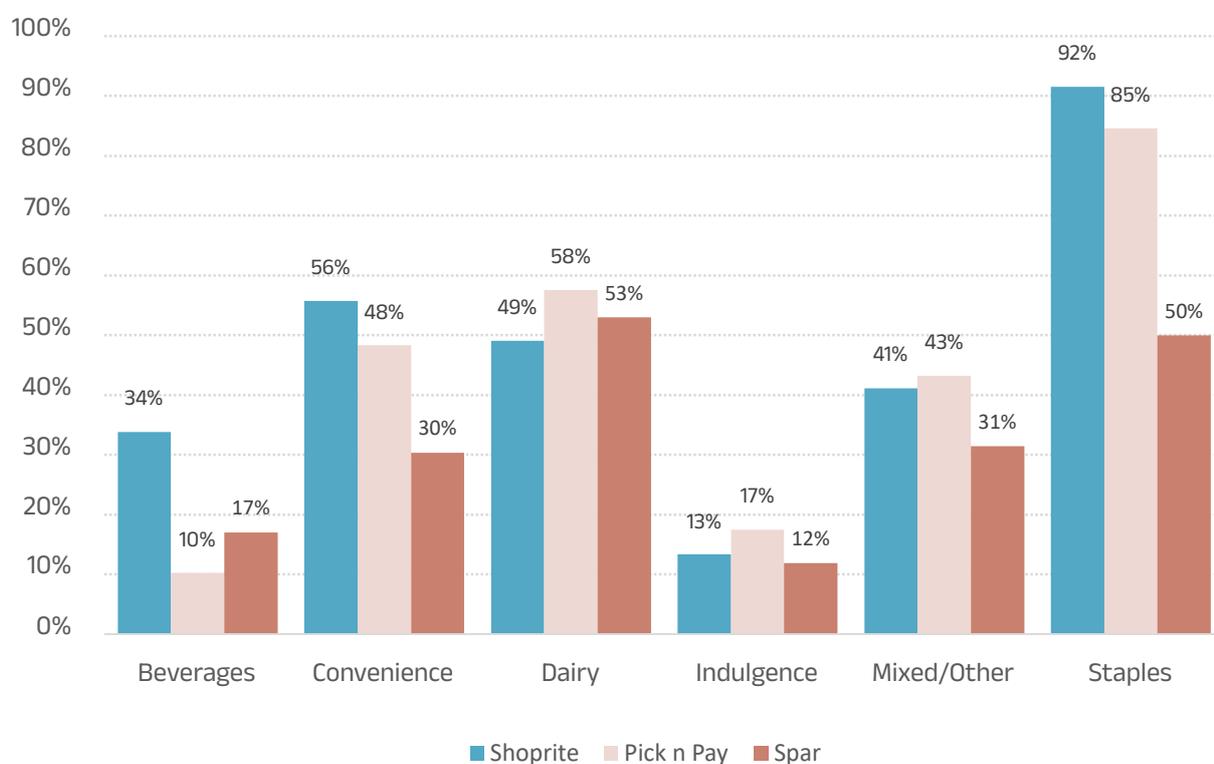
Comparing product categories across retailers using HSR

The analysis covers 25 product categories, revealing significant variation in nutritional quality. Across the three retailers, the lowest performing categories included RTD coffee and tea (0.5), Asian specialty drinks (0.5), concentrates (1.0-2.1), and other hot drinks (0.7-1.1). The highest-performing categories included flour (4.3-5), processed fruit and vegetables (4.0-4.5), rice, pasta and noodles (2.2-4.2), and dairy

(3.0-4.3). As reflected in these ranges, the mean HSR varied considerably between retailers within several categories.

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.

FIGURE 10
PROPORTION HEALTHIER PRIVATE-LABEL PRODUCTS BY CATEGORY GROUP^h
FOR THE THREE SELECTED SOUTH AFRICAN RETAILERS USING HSR



Comparing private-label with global manufacturer portfolios using HSR

At an aggregate industry level, retailers' private-label portfolios in South Africa show slightly higher overall healthiness than those of leading manufacturers assessed in the Global Index 2024.⁹ Across product categories covered in both assessments, the mean HSR across private-label portfolios from Pick n Pay, Shoprite, and Spar was 2.5 (3,496 products), compared to 2.4 (1,305 products) for 13 leading multinational manufacturers selling F&B products in South Africa (Table 2).

These findings are consistent with evidence from other markets. 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.⁸⁴ Similarly, an Australian study analysing 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.

⁹ This includes 13 manufacturers featured in ATNi's Global Index 2024 that are active in South Africa

TABLE 2
COMPARISON OF MEAN HSR BETWEEN SOUTH AFRICAN RETAILERS AND SOUTH AFRICAN MANUFACTURERS ASSESSED IN ATNI'S GLOBAL INDEX 2024

Category	Private-label products				Multinational F&B Manufacturers active in South Africa			
	Mean HSR	% healthier products	Healthier products	Total products	GI - Mean HSR	GI - % healthier products	GI - Healthier products	GI - Total products
Baked Goods	2.1	25%	84	336	2.1	33%	18	54
Bottled Water	3.7	68%	26	38	3.3	40%	4	10
Breakfast Cereals	3.7	65%	60	92	3.5	52%	38	73
Carbonates	2.1	12%	10	85	2.5	36%	12	33
Confectionery	1.2	1%	2	175	1.2	17%	41	248
Dairy	3.1	55%	184	333	3.4	66%	199	303
Energy Drinks	1.4	0%	0	6	1.4	0%	0	20
Ice Cream	2.2	11%	3	27	2.3	4%	3	69
Juice	2.7	23%	34	147	2.6	10%	13	129
Ready Meals	3.2	59%	167	281	2.6	0%	0	5
Rice, Pasta and Noodles	3.7	83%	91	109	3.7	90%	43	48
Sauces, Dips and Condiments	2.2	20%	74	375	1.7	18%	16	90
Savoury Snacks	2.5	32%	83	259	2.0	16%	20	128
Soup	2.2	33%	49	149	3.1	71%	46	65
Sweet Biscuits, Snack Bars and Fruit Snacks	1.4	6%	14	224	2.2	10%	3	30
Total	2.5	33%	881	2636	2.4	35%	456	1305

Fortification

Since 1995, South Africa has required mandatory iodization of table salt. However, salt used in the manufacture of processed foods and salt sold in bags of at least 20 kg are exempt from this legislation.⁸⁵ In addition, since 2003, South Africa has required mandatory fortification of maize meal and wheat flour, including requirements for Vitamin A, thiamine, riboflavin, niacin, pyridoxine, folic acid, iron and zinc (see Table 3).⁸⁶

18 applicable private-label wheat flour and maize meal products were identified across the three selected retailers. However, a review of product information on retailer websites found that only half (9) displayed the 'Fortified for Better Health' logo. No products were

TABLE 3
OVERVIEW OF FORTIFICATION POLICIES IN SOUTH AFRICA

Food Category	Voluntary / Mandatory	Specified Micronutrients
Maize meal and wheat flour	Mandatory	Vitamin A, thiamine, riboflavin, niacin, pyridoxine, folic acid, iron and zinc. ⁸⁶
Salt	Mandatory	Iodine (potassium iodate) ⁸⁵

identified carrying the 'Highly Fortified' logo. This indicates an area where retailers can take further action to ensure fortified products are clearly visible to consumers.

TABLE 4
OVERVIEW OF FORTIFICATION LOGOS IN SOUTH AFRICA

Label name	Description	Image
Fortified for Better Health logo	May be displayed on labels and advertising of fortified wheat flour and maize meal. While applicable products must be fortified in line with regulations, use of the logo itself is voluntary. ⁸⁷	
Highly Fortified logo	Applies specifically to 'highly fortified' maize meal, fortified at levels of at least 30% of Nutrient Reference Values for individuals older than 36 months of age ⁸⁷	

BOX 12 R214 MANDATORY TARGETS FOR SODIUM REDUCTION (2019)

Since 2013, the South African NDoH has enforced mandatory sodium reduction targets aimed at reducing national sodium intake by an estimated 0.85g per day and lowering annual cardiovascular deaths by 11%. R214 sets mandatory phased reduction targets for food manufacturers to reduce the sodium content across 13 food categories, including bread, breakfast cereals, and processed meats.⁸⁸ This phased approach included interim targets set for 2016, with stricter targets introduced in June 2019.⁸⁸

A 2024 study reported generally good compliance (75%) with the 2019 targets. Processed meat categories (particularly uncured meats and sausages) and bread were identified as the least compliant according to back-of-pack labelling and chemical analysis.⁸⁹ Importantly, a study of purchasing data from 344,161 households found that bread and bakery products (23.3%) and meat and meat products (19%) are the top two largest contributors to salt purchases.



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 South Africa.

This research component examines how frequently products classified as 'healthy', 'unhealthy in excessive amounts', and 'unhealthy' are promoted in practice. 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 overarching [Scope and Methodology Report](#). A summary of the key findings for Shoprite, Pick n Pay and Spar is provided below.

A total of 1,194 food products were analyzed from two biweekly flyers each from Shoprite, Pick n Pay, and Spar. On average, the Shoprite flyers (n = 204) featured a similar number of products to Pick n Pay (n = 203) and slightly more than Spar (n = 191).

Figure 11 summarizes the proportion of promoted foods categorized as 'healthy', 'unhealthy in excessive amounts', 'unhealthy', and 'other'. Overall, each retailers allocated less than one-quarter of flyer space to healthy products. Pick n Pay featured the highest share of healthy items (21%) and the lowest share of unhealthy items (53%). Spar and Shoprite showed lower proportions of healthy food promotions (16% and 15%, respectively) and higher proportions of unhealthy promotions (67% and 62%, respectively).

FIGURE 11
PROPORTION OF HEALTHY, UNHEALTHY IN EXCESSIVE AMOUNT, UNHEALTHY, AND OTHER PRODUCTS

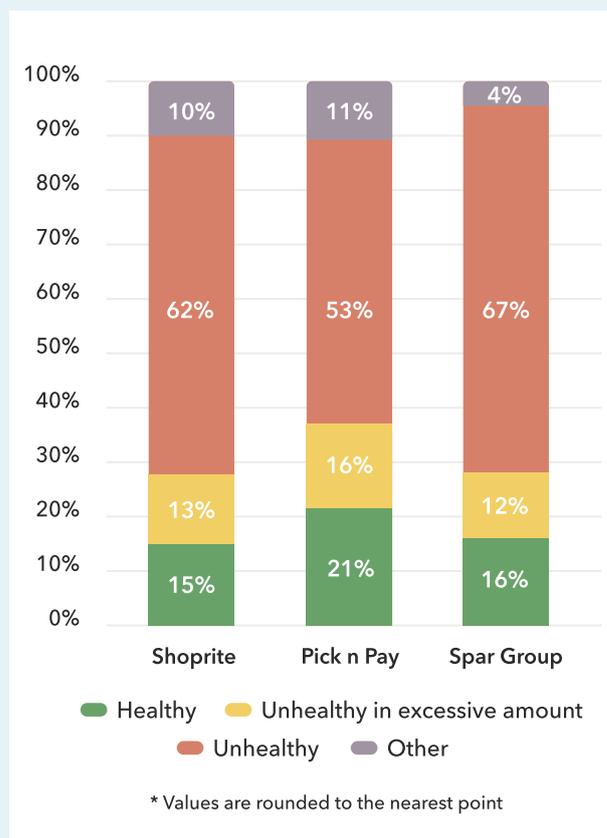


Table 5 presents the proportion of specific groups of healthy foods promoted in each flyer. Pick n Pay, which had the highest overall percentage of healthy foods, devoted most of its healthy food promotions to vegetables (5%) and poultry and game meat (5%). Spar showed a similar pattern, focusing on vegetables (5%) and poultry and game meat (2%), although at lower proportions than Pick n Pay. In contrast, Shoprite featured relatively fewer promotions for vegetables (2%), but promoted fish and shellfish (3%), whole grains (2%), and healthy ready meals (1%) slightly more frequently than the other retailers.

**TABLE 5
MEAN PERCENT OF HEALTHY
FOOD INCLUDED IN FLYERS**

Healthy Food Group	Pick n Pay	Shoprite	Spar
All fruits	3.1%	0.0%	0.5%
Citrus fruits	1.0%	0.0%	0.2%
Deep orange fruits	0.0%	0.0%	0.0%
Other fruits	2.1%	0.0%	0.2%
All vegetables	5.0%	2.2%	5.3%
Dark green leafy vegetables	0.0%	0.0%	0.0%
Cruciferous vegetables	0.0%	0.0%	0.0%
Deep orange vegetables	1.6%	0.0%	0.0%
Other vegetables	3.4%	2.2%	5.3%
Legumes	0.7%	0.5%	1.5%
Deep orange tubers	0.2%	0.0%	0.2%
Nuts and seeds	1.0%	0.8%	0.5%
Whole grains	1.1%	2.0%	1.1%
Fish and shellfish	2.9%	3.2%	1.7%
Poultry and game meat	4.8%	3.7%	2.2%
Low fat dairy	1.7%	0.5%	0.5%
Eggs	0.2%	0.2%	0.3%
Healthy ready meals	0.5%	1.5%	1.1%
Unsweetened beverages	0.6%	1.0%	1.8%

Table 6 summarizes the promotion of unhealthy food groups across the retailers. Refined grains, baked goods, and snacks (13-16%), along with sweets and ice cream (12-19%), were consistently among the most prominently featured unhealthy food products across all three retailers. SSBs were also frequently promoted, particularly by Shoprite (11%) and Spar (13%), while high-fat dairy products appeared notably often in Pick n Pay flyers (12%).

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

Unhealthy Food Group	Pick n Pay	Shoprite	Spar
High-fat dairy*	12.5%	7.2%	8.3%
Red meat*	2.1%	2.1%	0.9%
Oils and fats*	4.2%	3.6%	3.4%
Processed meat	6.4%	6.3%	4.0%
Sauces, dips, and condiment	3.0%	5.5%	4.7%
Refined grains, baked goods, and snacks	12.6%	15.1%	16.1%
Sweets and ice cream	12.2%	13.5%	18.8%
Sugar-sweetened beverages	6.4%	11.0%	13.5%
Juice	0.2%	2.7%	1.7%
White roots and tubers	0.3%	0.0%	0.0%
Purchased deep fried foods and unhealthy ready meals	7.2%	8.3%	7.8%

* Foods that are unhealthy in excessive amount

Our findings are consistent with results from a previous international study comparing the healthiness of supermarket flyers, including those from Shoprite, which also found that flyers predominantly featured discretionary items (less healthy foods) rather than core foods (healthier options).⁹⁰

Similarly, a study assessing in-store promotions across six major supermarket chains in Cape Town found that HFSS snack products were commonly displayed in checkout and high-traffic areas.⁹¹ Marketing strategies such as branded displays, special offers, and combo deals frequently featured these ready-to-eat snacks, particularly sweet baked goods, chips, chocolate, and SSBs.⁹¹ The prominence of these items in the analysed flyers mirrors in-store marketing patterns, highlighting the sector's consistent emphasis on less healthy, highly processed food.





COST AND AFFORDABILITY

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

Pricing data was available for nine of the eighteen retailers assessed. In South Africa, the analysis covers Pick n Pay only. Price data for Shoprite and Spar were not available on Euromonitor International's VIA platform at the time of publication and therefore could not be included.

At Pick n Pay, the cost of a healthier food basket was consistently higher than that of a less healthy food basket, with a price gap of 30.2% between the two baskets (Figure 12). In PPP-adjusted terms, the healthier food basket costs USD 18.56 compared with USD 14.26 for a less healthy food basket. While a healthier food basket at Pick n Pay in PPP-adjusted terms cost was higher than that at retailers in higher-income countries (France, US), it was lower than at retailers in middle and lower-income countries (Indonesia, Philippines, Kenya).

When assessed relative to income, a healthier food basket represented 44.7% of daily per capita GNI, compared with 34.3% for a less healthy basket. In terms of daily per capita net income, a healthier food basket accounted for 28.2%, while a less healthy food basket accounted for 21.7%. Among the nine retailers assessed, this corresponded to the median most costly healthier basket.

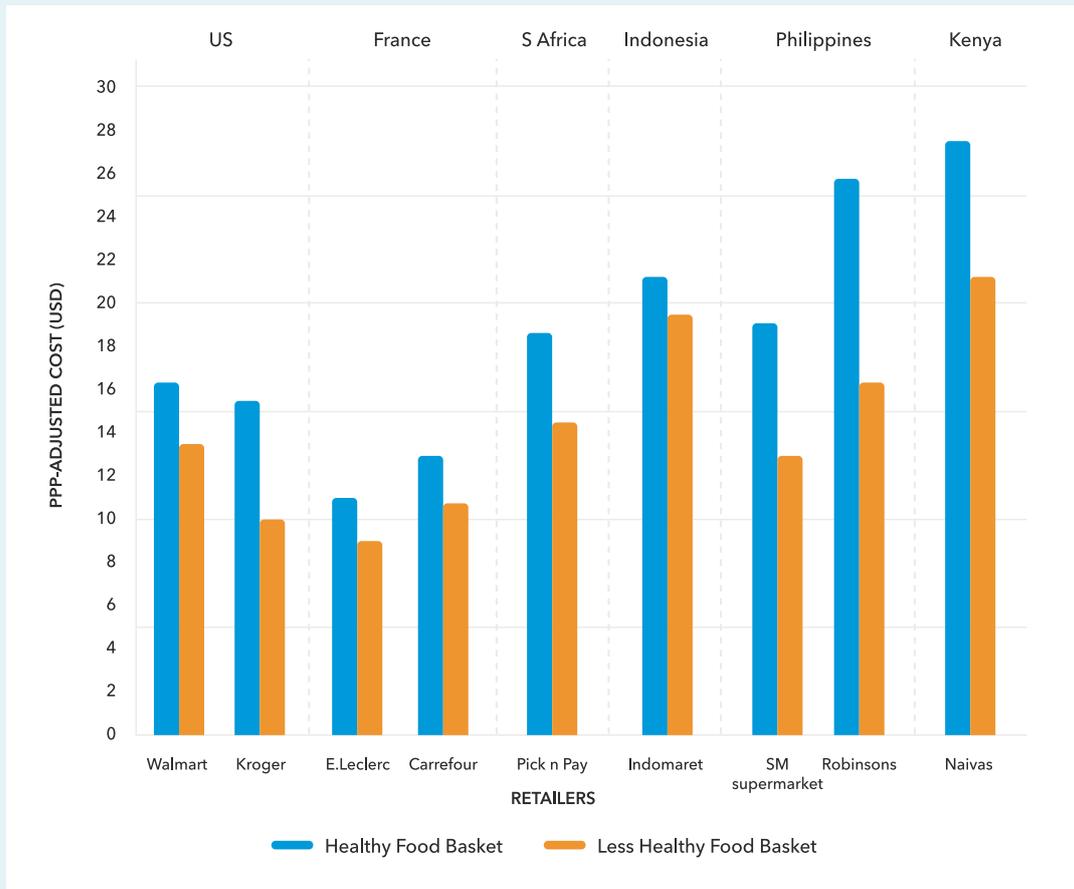
BOX 13 POLICY: HEALTH PROMOTION LEVY (HPL) (2018)

Excise taxes on commonly consumed goods can shape consumer preferences, influencing both private-label offerings and retailer stocking strategies. The HPL is an excise tax on SSBs, introduced in 2018. The levy is charged at 2.1 cents per gram of sugar exceeding the first 4g/100mL, amounting to approximately 8% of the selling price. The HPL is designed to encourage healthier diets, and generate government revenue for various health promotion efforts.⁹²

It should be noted that this falls below the WHO recommendation of a 20% excise tax on the selling price for effectively reducing the prevalence of NCDs, such as type 1 diabetes.⁹³

^h Pricing data for fruits and vegetables were largely based on frozen items, as fresh options were limited in the available dataset. In addition, the analysis reflects only modern grocery retail (Pick n Pay); in many lower- and (upper-)middle-income

FIGURE 12
THE COST OF HEALTHIER AND LESS HEALTHY RETAIL BASKETS PER PERSON PER DAY (PPP-ADJUSTED USD, 2024)





CONCLUSION AND RECOMMENDATIONS

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

FOR RETAILERS

1 Strengthen nutrition governance and accountability

- Explicitly acknowledge consumer health and nutrition as a material business issue by embedding it into materiality assessments and ESG risk evaluations and publicly disclose any nutrition-related risks.
- Integrate nutrition considerations throughout commercial strategy, establishing a comprehensive plan to improve the retailer's impact on consumer health, supported by defined executive level accountability and board oversight.
- Tie executive remuneration to specific, measurable nutrition metrics, such as the proportion of private-label sales meeting 'healthier' criteria, reductions in nutrients of concern or increases in the share of promotions featuring healthier options.
- Provide annual, publicly-available reporting on nutrition governance, progress, and performance, with disclosures disaggregated by trading brand or retail format.

2 Set measurable targets and report transparently

- Establish specific, time-bound targets to increase the share of 'healthier' private-label sales using a government-endorsed or internationally recognized NPM—such as the proposed South African NPM for Health and Nutrition Claims, or FOP labelling system.
- Report annually on the share of 'healthier' private-label sales, ideally following ATNi's proposed NPM reporting guidelines.

3 Improve portfolio composition through reformulation

- Strengthen the nutritional quality of private-label portfolios through reformulation, reducing sodium, sugar, saturated fat and unnecessary additives, while expanding the proportion of minimally processed products meeting 'healthier' thresholds.
- Set specific reformulation targets in high-volume private-label categories—particularly those not meeting the 'healthier' criteria under the South African NPM.
- Collaborate with suppliers to encourage reformulation and innovation of branded products through shared targets, incentives, and transparent monitoring of progress.

4 Rebalance promotions toward healthier products.

- Establish targets to increase the proportion of healthier products featured in flyer, e-commerce and loyalty programme promotions.
- Monitor and disclose the proportion of promotions by product healthiness, using a clear definition of 'healthier.'
- Improve in-store and online environments to encourage healthier choices through product placement and shelf positioning that make healthier options prominent, visible, and appealing.

5 Strengthen responsible marketing, particularly to children.

- Adopt a company-wide marketing policy prohibiting the marketing of products that fail to meet nutrition standards to children under 18 years across all marketing channels, in line with WHO and UNICEF recommendations.
- Assess compliance through independent third-party audits and report publicly.

6 Address affordability gaps.

- Integrate affordability into the nutrition strategy, adopting clear definitions of 'affordable' and 'healthier' products, and report progress annually.
- Implement targeted strategies to reduce price gaps between healthier and less healthy products, including more lower priced private-label options, produce discounts, and loyalty incentives that encourage healthier purchases.

FOR POLICYMAKERS

A [policy brief](#) is published separately including more details.

1 Implementation of the proposed FOP warning labelling system, as well as regulation of nutrition and health claims, and child-directed marketing (0-18 years) under Draft R3337 across all F&B categories.

- Introduce mandatory FOP warning labels to empower consumers to make healthier choices and guide retailers and F&B manufacturers in product reformulation.
- Strengthen the labelling system by considering requirements for products meeting 'healthier' thresholds, with the aim of more clearly signposting healthy options to consumers.
- Minimize delays in implementation to avoid consumer confusion.

2 Require companies to report publicly on the shares of sales derived from healthier products to encourage transparency and accountability.

- Mandate large companies to report on the share of sales derived from products meeting 'healthier' thresholds under the South African NPM.

3 Increase the Health Promotion Levy (HPL) to align with global guidelines for optimum impact.

- Tax unhealthy foods, such as SSBs, to reduce the prevalence of overweight, obesity, and type 2 diabetes.
- Consider increasing the HPL to a 20% excise tax on the retail price in line with WHO recommendations.

FOR INVESTORS

1 Integrate nutrition into sustainable investment strategies, using ATNi's data and the [Investor Expectations on Nutrition, Diets and Health](#) to enable investors to:

- Assess retailers' exposure to nutrition-related risks and opportunities.
- Prioritize investments in retailers expanding access to healthier foods.
- Identify opportunities for investments in new technologies and innovations delivering healthier foods to consumers.

2 Engage with retailers to encourage them to:

- Set and disclose time-bound targets to improve portfolio healthiness using internationally recognized NPMs, and support FOP implementation.
- Use promotions and marketing strategies to drive

sales of healthier products and ensure only healthier products are marketed to children.

- Assign executive-level oversight and linking executive remuneration to nutrition KPIs.
- Address affordability gaps, particularly for low-income consumers.

3 Engage policymakers and standards-setters to:

- Drive investments towards shaping healthier food environments.
- Expand access to healthy foods in low-income settings.
- Foster transparent, standardized nutrition reporting by retailers.

REFERENCES

- 1 Spaza Shops Health and Safety Guide [Internet]. SME South Africa. [cited 2025 Sep 10]. Available from: <https://smesouthafrica.co.za/sme-guides/spaza-shops-health-and-safety-in-south-africa-guide/>
- 2 Charman A, Bacq S, Brown K. SPATIAL DETERMINANTS OF FORMAL RETAILERS' IMPACT ON INFORMAL MICRO-ENTERPRISES IN PHILIPPI, CAPE TOWN.
- 3 Euromonitor International. Staple Foods Industry edition. 2024.
- 4 Department of Agriculture, Land Reform and Rural Development (DALRRD). National Food and Nutrition Security Survey: National Report [Internet]. Pretoria, South Africa: Human Sciences Research Council; 2023 [cited 2025 Jul 12]. Available from: <https://foodsecurity.ac.za/publications/national-food-and-nutrition-security-survey-national-report/>
- 5 FAO, IFAD, UNICEF, WFP and WHO. The State of Food Security and Nutrition in the World 2025 [Internet]. 2025 [cited 2025 Aug 6]. Available from: <https://www.fao.org/3/cd6008en/online/cd6008en.html>
- 6 UNICEF. Malnutrition in Children [Internet]. UNICEF DATA. 2025 [cited 2025 Aug 7]. Available from: <https://data.unicef.org/topic/nutrition/malnutrition/>
- 7 Winnie Sambu. Micronutrient deficiencies [Internet]. Child Count: Statistics on Children in South Africa. 2019 [cited 2025 Aug 27]. Available from: <http://childrencount.uct.ac.za/indicator.php?domain=4&indicator=97#:~:text=Iron%20deficiency%20affects%20motor%20and,children%20younger%20than%204%20years.&text=Vitamin%20A%20deficiency%20causes%20illness,increases%20the%20risk%20for%20mortality.&text=In%20South%20Africa%2C%20the%20main,A%2C%20iron%20and%20zinc%20deficiencies.>
- 8 WHO Data. Age-standardized prevalence of obesity among adults (18+ years) [Internet]. World Health Organization Data. 2025 [cited 2025 Jun 12]. Available from: <https://data.who.int/indicators/i/C6262EC/BEFA58B>
- 9 WHO Data. Prevalence of obesity among children and adolescents aged 5 to 19 years [Internet]. World Health Organization Data. 2025 [cited 2025 Jun 6]. Available from: <http://data.who.int/indicators/i/C6262EC/EF93DDB>
- 10 FAO, IFAD, UNICEF, WFP, WHO. The State of Food Security and Nutrition in the World 2024 [Internet]. FAO ; IFAD ; UNICEF ; WFP ; WHO ; 2024 [cited 2025 Jul 12]. Available from: <https://openknowledge.fao.org/handle/20.500.14283/cd1254en>
- 11 Kaldenbach S, Engebretsen IMS, Haskins L, Conolly C, Horwood C. Infant feeding, growth monitoring and the double burden of malnutrition among children aged 6 months and their mothers in KwaZulu-Natal, South Africa. *Matern Child Nutr.* 2022;18(1):e13288.
- 12 Harper A, Goudge J, Chirwa E, Rothberg A, Sambu W, Mall S. Dietary diversity, food insecurity and the double burden of malnutrition among children, adolescents and adults in South Africa: Findings from a national survey. *Front Public Health* [Internet]. 2022 Sep 23 [cited 2025 Jul 14];10. Available from: <https://www.frontiersin.org/journals/public-health/articles/10.3389/fpubh.2022.948090/full>
- 13 Senekal M, Nel JH, Eksteen G, Steyn NP. Dietary Patterns, Socio-Demographic Predictors Thereof, and Associations of Dietary Patterns with Stunting and Overweight/Obesity in 1-<10-Year-Old Children in Two Economically Active Provinces in South Africa. *Nutrients.* 2023 Sep 25;15(19):4136.
- 14 Madlala SS, Hill J, Kunneke E, Kengne AP, Peer N, Faber M. Dietary Diversity and its Association with Nutritional Status, Cardiometabolic Risk Factors and Food Choices of Adults at Risk for Type 2 Diabetes Mellitus in Cape Town, South Africa. *Nutrients.* 2022 Aug 4;14(15):3191.
- 15 Ronquest-Ross LC, Vink N, Sigge GO. Food consumption changes in South Africa since 1994. *South Afr J Sci.* 2015 Sep 25;111(9/10):12.
- 16 GDQP. South Africa: Dietary Quality Data [Internet]. dietquality.org/. 2025 [cited 2025 Aug 8]. Available from: <https://www.dietquality.org/countries/zaf>
- 17 Frank T, Ng SW, Lowery CM, Thow AM, Swart EC. Dietary intake of low-income adults in South Africa: ultra-processed food consumption a cause for concern. *Public Health Nutr.* 2024 Jan;27(1):e41.
- 18 Nglazi MD, Ataguba JE. Explaining socioeconomic inequality in food consumption patterns among households with women of childbearing age in South Africa. *PLOS Glob Public Health.* 2024 Oct 21;4(10):e0003859.
- 19 Kroll F, Swart EC, Annan RA, Thow AM, Neves D, Apprey C, et al. Mapping Obesogenic Food Environments in South Africa and Ghana: Correlations and Contradictions. *Sustainability.* 2019 Jan;11(14):3924.
- 20 Dlamini NN, Tuorila H, De Kock HL. Food choice drivers at varying income levels in an emerging economy. *Appetite.* 2023 Oct 1;189:107001.
- 21 Goetjes E, Pavlova M, Hongoro C, Groot W. Socioeconomic Inequalities and Obesity in South Africa—A Decomposition Analysis. *Int J Environ Res Public Health.* 2021 Jan;18(17):9181.
- 22 Godbharle S, Kesa H, Jeyakumar A, Shambharkar P. Socio-demographic and economic factors associated with the consumption of processed foods in South Africa - Evidence from Demographic and Health Survey VII. *Public Health.* 2024 Jan 1;226:190-8.
- 23 Department of Health. Guidelines for Healthy Eating [Internet]. 2013 [cited 2025 Sep 30]. Available from: <https://www.nutritionweek.co.za/NNW2014/docs/NNW-2013-Nutrition%20Educators%20Guideline.pdf>

- 24 South Africa [Internet]. Food and Agriculture Organization of the United Nations. [cited 2025 Oct 2]. Available from: <http://www.fao.org/nutrition/education/dietary-guidelines/regions/south-africa/en/>
- 25 GAIN, The Columbia Climate School and Cornell University College of Agriculture and Life Sciences. Kenya - Food Systems Dashboard [Internet]. The Food Systems Dashboard. 2025 [cited 2025 Mar 25]. Available from: <https://www.foodsystemsdashboard.org/countries/ken#retail-value-of-ultra-processed-food-sales-per-capita>
- 26 Food Systems Dashboard. Philippines - Food Systems Dashboard [Internet]. The Food Systems Dashboard. 2025 [cited 2025 Mar 25]. Available from: <https://www.foodsystemsdashboard.org/countries/phl>
- 27 GAIN, The Columbia Climate School, Cornell University College of Agriculture and Life Sciences. Food Systems Dashboard [Internet]. [cited 2025 Apr 22]. Available from: <https://www.foodsystemsdashboard.org/>
- 28 Department of Health. National Strategic Plan for the Prevention and Treatment of Non-communicable Diseases 2022-2027 [Internet]. Republic of South Africa; 2022 Sep [cited 2026 Jan 7]. (NDP 2023). Available from: <https://www.health.gov.za/wp-content/uploads/2025/05/NCD-NSP-FINAL-VERSION-20-SEPT-22-1.pdf>
- 29 Crush J, Frayne B. The 'supermarketization' of food supply and retail: Private sector interests and household food security. In: Food and Nutrition Security in Southern African Cities. Routledge; 2017.
- 30 Otterbach S, Oskorouchi HR, Rogan M, Qaim M. Using Google data to measure the role of Big Food and fast food in South Africa's obesity epidemic. *World Dev.* 2021 Apr 1;140:105368.
- 31 The Future of Traditional Retail in Africa [Internet]. BCG Global. 2022 [cited 2025 Aug 11]. Available from: <https://www.bcg.com/publications/2022/the-future-of-traditional-retail-in-africa>
- 32 Skinner C, Haysom G. THE INFORMAL SECTOR'S ROLE IN FOOD SECURITY: A MISSING LINK IN POLICY DEBATES?
- 33 Prinsloo E. Spaza shops growing strongly, study shows [Internet]. Supermarket & Retailer. 2017 [cited 2025 Aug 11]. Available from: <https://supermarket.co.za/index.php/research-tools/2441-spaza-shops-growing-strongly,-study-shows>
- 34 Statements M. Spaza Shops critical in bolstering township and rural economies - The Department of Trade Industry and Competition [Internet]. [cited 2026 Feb 15]. Available from: <https://www.thedtic.gov.za/spaza-shops-critical-in-bolstering-township-and-rural-economies/>
- 35 Innovation on Every Shelf: DIME's journey to safer, smarter township retail | United Nations in South Africa [Internet]. [cited 2026 Feb 16]. Available from: <https://southafrica.un.org/en/305529-innovation-every-shelf-dime%E2%80%99s-journey-safer-smarter-township-retail>
- 36 Definitions [Internet]. Euromonitor. [cited 2025 Dec 10]. Available from: <https://www.euromonitor.com/definitions>
- 37 Euromonitor International. Retail in South Africa. 2024 Feb. (Passport).
- 38 Maluleke R. General Household Survey 2023.
- 39 World Wide Worx. Online Retail in South Africa 2024 [Internet]. gadget.co.za. 2024 [cited 2025 Aug 11]. Available from: <https://gadget.co.za/wp-content/uploads/2024/05/Online-Retail-in-South-Africa-2024.pdf>
- 40 South Africa's online grocery boom signals digital shift [Internet]. Ventureburn. 2024 [cited 2025 Aug 11]. Available from: <https://ventureburn.com/2024/10/south-africas-online-grocery-boom-signals-digital-shift/>
- 41 Food Systems Dashboard. South Africa - Country Diagnostics [Internet]. Food Systems Dashboard; 2025. Available from: <https://www.foodsystemsdashboard.org/countries/zaf#anemia-in-women-15-49-years>
- 42 Battersby J, Peyton S. The Geography of Supermarkets in Cape Town: Supermarket Expansion and Food Access. *Urban Forum.* 2014 Jun;25(2):153-64.
- 43 Weatherspoon DD, Reardon T. The Rise of Supermarkets in Africa: Implications for Agrifood Systems and the Rural Poor. *Dev Policy Rev.* 2003 May;21(3):333-55.
- 44 Battersby J. Food System transformation in the Absence of Food System Planning: The Case of Supermarket and Shopping Mall Retail Expansion in Cape Town, South Africa. *Built Environ.* 2017 Sep 1;43(3):417-30.
- 45 Pheiffer CF, McGarvey ST, Ginsburg C, Harawa S, White MJ. Dietary patterns and their socio-demographic correlates in the context of migration and urbanisation demonstrate nutrition transitions in South Africa. *Glob Public Health* [Internet]. 2024 Dec 31 [cited 2025 Jul 23];19(1). Available from: <https://www.tandfonline.com/doi/full/10.1080/17441692.2024.2375541>
- 46 Competition Commission. THE GROCERY RETAIL MARKET INQUIRY - FINAL REPORT [Internet]. 2019 [cited 2025 Jul 24]. Available from: <https://www.compcom.co.za/wp-content/uploads/2019/12/GRMI-Non-Confidential-Report.pdf>
- 47 Odunitan-Wayas F, Okop K, Dover R, Alaba O, Micklesfield L, Puoane T, et al. Food Purchasing Characteristics and Perceptions of Neighborhood Food Environment of South Africans Living in Low-, Middle- and High-Socioeconomic Neighborhoods. *Sustainability.* 2018 Dec;10(12):4801.
- 48 Haysom G, Crush J, Caesar M. No. 03: The Urban Food System of Cape Town, South Africa [Internet]. Waterloo, Ontario: Hungry Cities Partnership; 2017. (Hungry Cities Report). Report No.: 3. Available from: <https://scholars.wlu.ca/cgi/viewcontent.cgi?article=1016&context=hcp>
- 49 United Nations Conference on Trade and Development. Transforming Southern Africa: Harnessing Regional Value Chains and Industrial Policy for Development [Internet]. United Nations; 2021 [cited 2025 Sep 10]. Available from: <https://www.un-ilibrary.org/content/books/9789210056212>

- 50 Masojada M. Chapter 6: The South African Retail Landscape. In: Marketing to South African Consumers [Internet]. Cape Town, South Africa. UCT Liberty Institute; 2021 [cited 2025 Jul 24]. Available from: <https://openbooks.uct.ac.za/uct/catalog/view/29/52/1576>
- 51 Odunitan-Wayas FA, Okop KJ, Dover RV, Alaba OA, Micklesfield LK, Puoane T, et al. Food purchasing behaviour of shoppers from different South African socio-economic communities: results from grocery receipts, intercept surveys and in-supermarkets audits. *Public Health Nutr.* 24(4):665–76.
- 52 Crush J, Caesar M, Haysom G. No. 12: The State of Household Food Security in Cape Town, South Africa.
- 53 Costa CS, Del-Ponte B, Assunção MCF, Santos IS. Consumption of ultra-processed foods and body fat during childhood and adolescence: a systematic review. *Public Health Nutr.* 2017/07/05 ed. 2018;21(1):148–59.
- 54 How to Withdraw Money from Your SASSA Card? [Internet]. 2023 [cited 2025 Oct 2]. Available from: <https://csrd.co.za/withdraw-sassa-grant-by-card/>
- 55 Coste M, Pereira L, Charman A, Peterson L. (PDF) ‘Hampers’ as an effective strategy to shift towards sustainable diets in South African low-income communities. *ResearchGate* [Internet]. [cited 2025 Jul 21]; Available from: https://www.researchgate.net/publication/358173804_'Hampers'_as_an_effective_strategy_to_shift_towards_sustainable_diets_in_South_African_low-income_communities
- 56 Odunitan-Wayas FA, Faber M, Mendham AE, Goedecke JH, Micklesfield LK, Brooks NE, et al. Food Security, Dietary Intake, and Foodways of Urban Low-Income Older South African Women: An Exploratory Study. *Int J Environ Res Public Health.* 2021 Jan;18(8):3973.
- 57 Brown LJ, Mannell J, Washington L, Khaula S, Gibbs A. “Something we can all share”: Exploring the social significance of food insecurity for young people in KwaZulu-Natal, South Africa. *PLOS Glob Public Health.* 2024 May 28;4(5):e0003137.
- 58 Food Retail Dashboard. *Food Retail Trends* [Internet]. [cited 2025 Jul 24]. Available from: <https://retaildashboard.shinyapps.io/foodretaildashboard/>
- 59 Stats SA. Income and Expenditure Survey 2022/23 [Internet]. Pretoria, South Africa: Department of Statistics South Africa; 2023 [cited 2026 Feb 16]. (Statistical Release). Available from: <https://www.statssa.gov.za/publications/P0100/P01002022.pdf>
- 60 Igumbor EU, Sanders D, Puoane TR, Tsolekile L, Schwarz C, Purdy C, et al. “Big Food,” the Consumer Food Environment, Health, and the Policy Response in South Africa. *PLOS Med.* 2012 Jul 3;9(7):e1001253.
- 61 Greenberg S. Corporate power in the agro-food system and the consumer food environment in South Africa. *J Peasant Stud.* 2017 Mar 4;44(2):467–96.
- 62 Briefings. *Rev Afr Polit Econ* [Internet]. 2004 Sep 1 [cited 2025 Sep 16];31(100). Available from: <https://scienceopen.com/hosted-document?doi=10.1080/0305624042000262338>
- 63 Dlodla N, Dlodla N. Ackerman family cedes control of South Africa’s Pick n Pay in revamp. *Reuters* [Internet]. 2024 May 27 [cited 2025 Jul 28]; Available from: <https://www.reuters.com/business/retail-consumer/ackerman-family-cedes-control-south-africas-pick-n-pay-revamp-2024-05-27/>
- 64 Who Owns Shoprite Holdings? SHPJ Shareholders [Internet]. *Investing.com.* 2025 [cited 2025 Dec 4]. Available from: [https://www.investing.com/equities/shoprite-holdings-ltd-\(j\)-ownership](https://www.investing.com/equities/shoprite-holdings-ltd-(j)-ownership)
- 65 Who Owns SPAR? SPPJ Shareholders - Investing.com ZA [Internet]. *Investing.com South Africa.* 2025 [cited 2025 Dec 4]. Available from: [https://za.investing.com/equities/spar-group-\(j\)-ownership](https://za.investing.com/equities/spar-group-(j)-ownership)
- 66 Pick n Pay Stores Limited: Shareholders Board Members Managers and Company Profile | ZAE000005443 | MarketScreener [Internet]. [cited 2026 Feb 16]. Available from: <https://www.marketscreener.com/quote/stock/PICK-N-PAY-STORES-LIMITED-1413401/company/>
- 67 Public Investment Corporation. PIC 2025 Integrated Annual Report [Internet]. 2025. Available from: <https://www.pic.gov.za/DocAnnualReports1/PIC%202025%20Integrated%20Annual%20Report.pdf>
- 68 Environmental, Social Governance [Internet]. [cited 2025 Dec 4]. Available from: <https://www.pic.gov.za/investment-philosophy-and-approach/environmental-social-governance>
- 69 (PDF) Growth and Strategies of Large, Lead Firms-Supermarkets. *ResearchGate* [Internet]. 2025 Aug 7 [cited 2025 Sep 15]; Available from: https://www.researchgate.net/publication/317995755_Growth_and_Strategies_of_Large_Lead_Firms-Supermarkets
- 70 Holdings S. OK Franchise Division [Internet]. [cited 2025 Sep 15]. Available from: <https://www.shopriteholdings.co.za/group/brands/ok-franchise-division.html>
- 71 Hull E. Supermarket Expansion, Informal Retail and Food Acquisition Strategies: An Example from Rural South Africa. 2016 Aug 25 [cited 2025 Sep 15]; Available from: <https://soas-repository.worktribe.com/output/388460/supermarket-expansion-informal-retail-and-food-acquisition-strategies-an-example-from-rural-south-africa>
- 72 What You Need to Bring to the Table – Pick n Pay Franchise [Internet]. [cited 2025 Sep 15]. Available from: <https://www.pnpfranchise.co.za/what-you-need-to-bring-to-the-table/>
- 73 The Future of Traditional Retail in Africa [Internet]. *BCG Global.* 2022 [cited 2025 Sep 10]. Available from: <https://www.bcg.com/publications/2022/the-future-of-traditional-retail-in-africa>
- 74 Department: Trade, Industry and Competition - Republic of South Africa. The Spaza Shop Support Fund (SSSF) – The Department of Trade Industry and Competition [Internet]. [cited 2026 Jan 16]. Available from: <https://www.thedtic.gov.za/the-spaza-shop-support-fund-sssf/>
- 75 Pick n Pay. Integrated Annual Report ‘25 [Internet]. 2025 [cited 2025 Sep 30]. Available from: <https://www.picknpayinvestor.co.za/pdf/annual-report/2025/integrated-annual-report-2025-singles.pdf>
- 76 Department of Health. R3337- REGULATIONS RELATING TO THE LABELLING AND ADVERTISING OF FOODSTUFFS. *Government Gazette.* 48460th ed. 2023 Apr 21;13–223.

- 77 Consumer Goods Council of South Africa. THE SOUTH AFRICAN MARKETING TO CHILDREN PLEDGE [Internet]. 2008. Available from: https://ifballiance.org/wp-content/uploads/2020/10/South_african_marketing_to_children_pledge.pdf
- 78 #AdTracker H1 2023: SA's top advertising spenders + retail deep dive • Article • MarkLives.com [Internet]. [cited 2025 Sep 15]. Available from: <https://www.marklives.com/article/42882-adtracker-h1-2023-sas-top-advertising-spenders-retail-deep-dive>
- 79 USDA Food and Nutrition Service. #AdTracker Sep 2022: SA's top spenders • Article • MarkLives.com [Internet]. [cited 2025 Sep 15]. Available from: <https://www.marklives.com/article/42285-adtracker-sep-2022-sas-top-spenders>
- 80 WHO. Policies to protect children from the harmful impact of food marketing: WHO guideline [Internet]. Geneva: World Health Organization; 2023. Available from: <https://iris.who.int/bitstream/handle/10665/370113/9789240075412-eng.pdf?sequence=1>
- 81 UNICEF. Marketing of unhealthy foods and non-alcoholic beverages to children [Internet]. 2021 p. 1-19. Available from: https://www.unicef.org/media/116691/file/Marketing_restrictions.pdf
- 82 Popkin BM, Miles DR, Taillie LS, Dunford EK. A policy approach to identifying food and beverage products that are ultra-processed and high in added salt, sugar and saturated fat in the United States: a cross-sectional analysis of packaged foods. *Lancet Reg Health - Am.* 2024 Apr 1;32:100713.
- 83 Frank T, Thow AM, Ng SW, Ostrowski J, Bopape M, Swart EC. A Fit-for-Purpose Nutrient Profiling Model to Underpin Food and Nutrition Policies in South Africa. *Nutrients.* 2021 Jul 28;13(8):2584.
- 84 Castro T, Mackay S, Young L, Ni Mhurchu C, Shaw G, Tawfiq E, et al. Comparison of Healthiness, Labelling, and Price between Private and Branded Label Packaged Foods in New Zealand (2015-2019). *Nutrients.* 2021 Aug 9;13(8):2731.
- 85 Charlton K, Ware LJ, Baumgartner J, Cockeran M, Schutte AE, Naidoo N, et al. How will South Africa's mandatory salt reduction policy affect its salt iodisation programme? A cross-sectional analysis from the WHO-SAGE Wave 2 Salt & Tobacco study. *BMJ Open.* 2018 Mar 1;8(3):e020404.
- 86 Food Fortification - FoodFacts [Internet]. [cited 2026 Feb 13]. Available from: <https://foodfacts.org.za/food-fortification/>
- 87 Department of Health. FOODSTUFFS, COSMETICS AND DISINFECTANTS ACT, 1972 (ACT NO. 54 OF 1972) REGULATIONS RELATING TO THE FORTIFICATION OF CERTAIN FOODSTUFFS [Internet]. 54 of 1972 Mar 3, 2016 p. 9. Available from: <https://dairystandard.co.za/wp-content/uploads/2024/02/Regulations%20-%20Relating%20To%20The%20Fortification%20Of%20Certain%20Foodstuffs%20-%20R217%20of%203%20March%202016.pdf>
- 88 Department of Health. Foodstuffs, Cosmetics and Disinfectants Act: Regulations: Reduction of sodium in certain foodstuffs and related matters: Amendment [Internet]. R214 Oct, 2017. Available from: https://www.gov.za/sites/default/files/gcis_document/201710/41164gon1071.pdf
- 89 Charlton KE, Pretorius B, Shakhane R, Naidoo P, Cimring H, Hussain K, et al. Compliance of the food industry with mandated salt target levels in South Africa: Towards development of a monitoring and surveillance framework. *J Food Compos Anal.* 2024 Feb 1;126:105908.
- 90 Charlton EL, Kähkönen LA, Sacks G, Cameron AJ. Supermarkets and unhealthy food marketing: An international comparison of the content of supermarket catalogues/circulars. *Prev Med.* 2015 Dec 1;81:168-73.
- 91 Solomon SL, Frank T, Ng SW, Swart EC. The nutritional composition and in-store marketing of processed and packaged snack foods available at supermarkets in South Africa. *Public Health Nutr.* 2024 Jan;27:e254.
- 92 Stacey N, Mudara C, Ng SW, van Walbeek C, Hofman K, Edoka I. Sugar-based beverage taxes and beverage prices: Evidence from South Africa's Health Promotion Levy. *Soc Sci Med.* 2019 Oct 1;238:112465.
- 93 WHO. Global report on the use of sugar-sweetened beverage taxes [Internet]. Geneva, Switzerland; 2023 p. 1-70. Available from: <https://iris.who.int/bitstream/handle/10665/374530/9789240084995-eng.pdf?sequence=1>