

ATNi NUTRITION MARKETS IMPACT

STRONGER FOUNDATIONS for nutrition

Gates Foundation

MarketFit Nutrition 2035: Guardrails And Incentives For Better Nutrition

12 NOVEMBER 2026

ATNi
NUTRITION
MARKETS
IMPACT

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Executive Director, ATNi

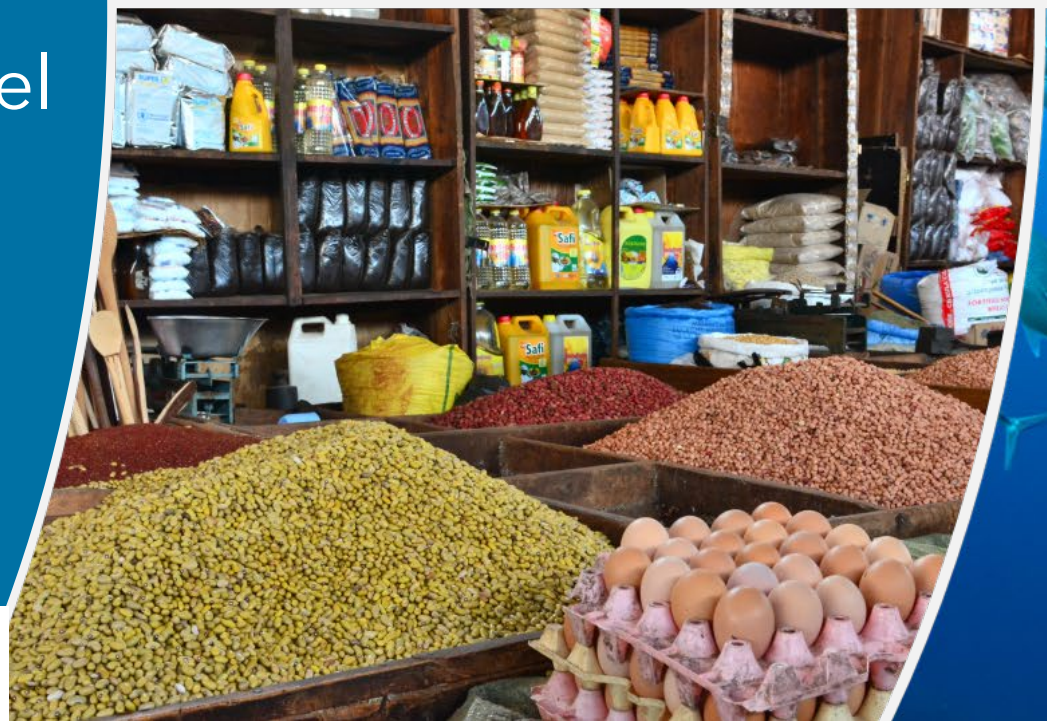


MarketFit Nutrition 2035

Healthier foods through country-level incentives and guardrails









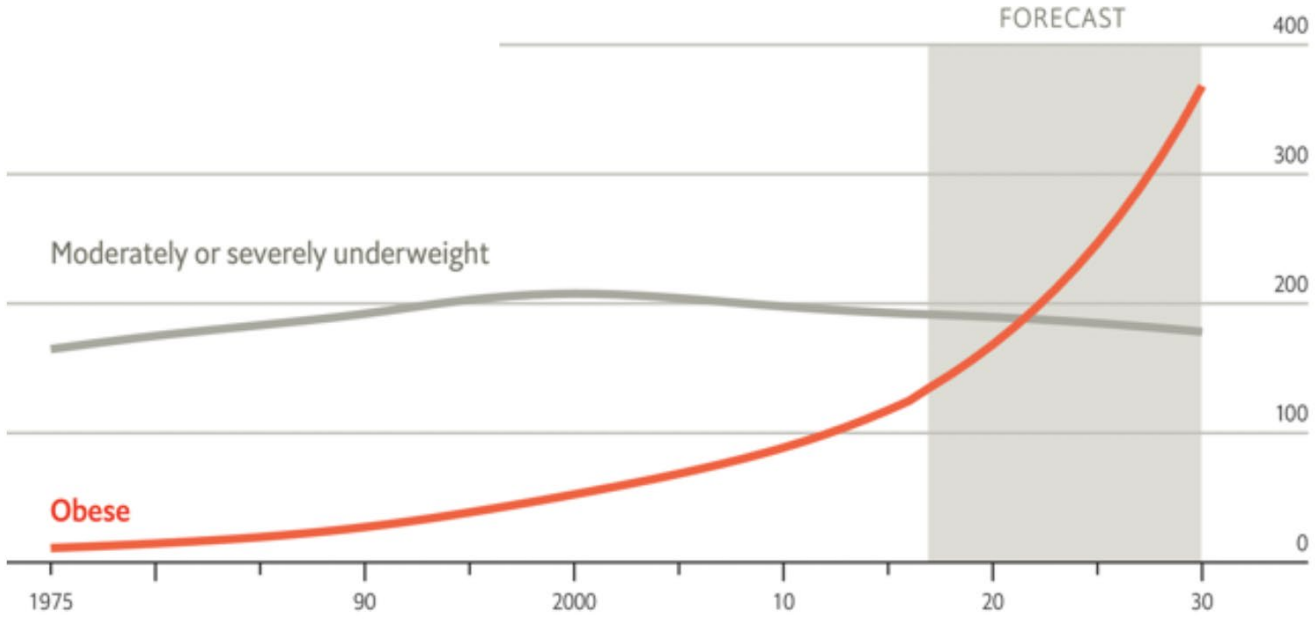
STRONGER FOUNDATIONS for nutrition

ATNi NUTRITION MARKETS IMPACT

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Problem 1: Food markets are shaping the global nutrition transition

- The prevalence of obesity among children and adolescents (9.4%) has overtaken underweight (9.2%). (UNICEF, 2025)

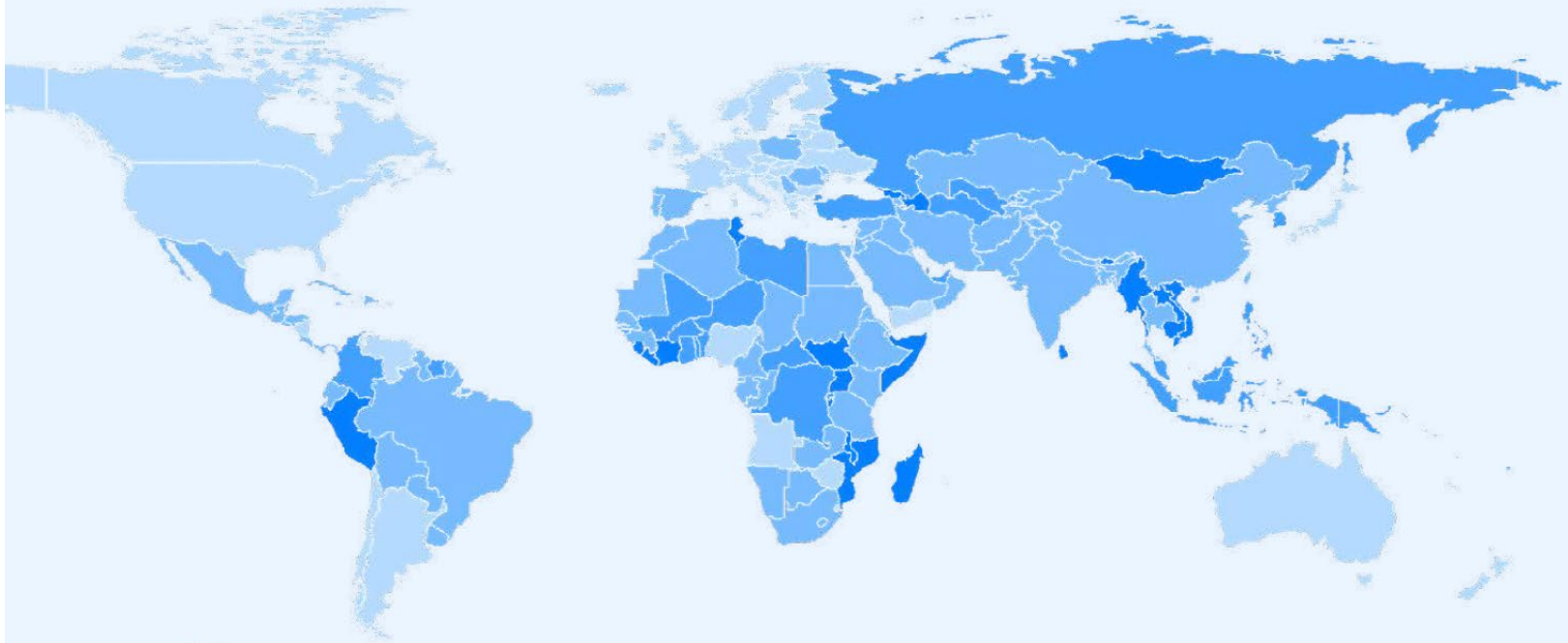




- Poor diets drive the global burden of disease and responsible for over half of non-communicable diseases. (Global Burden of Disease Study, 2023)
- Increasing consumption of unhealthy ultra-processed foods (UPFs) is a major driver of poor diets. (UPFs and Human Health Lancet Series, 2025)

Problem 2: Rapid growth of modern food retail represents risks AND opportunities

- Growth of food retail in LMICs brings food safety and convenience.
- It could also improve access to micronutrient rich foods.
- However, it currently accelerates access to unhealthy processed foods.



SOURCE: FOOD SYSTEMS DASHBOARD AUG 2022

Global growth in food retail*

-93% - 11%

11% - 41%

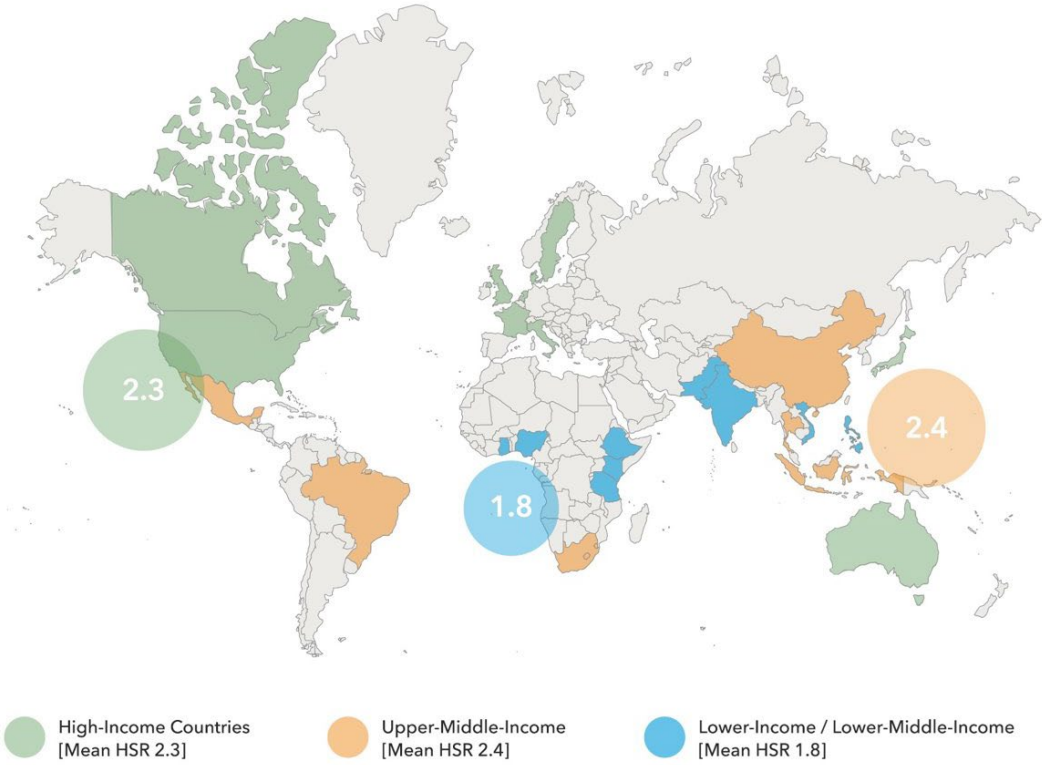
41% - 84%

84% - 379%

* Retail means 'modern grocery retailer' and that includes hypermarkets, supermarkets, discounters, forecourt retailers (grocery outlets attached to gas/ petrol stations), and convenience stores.

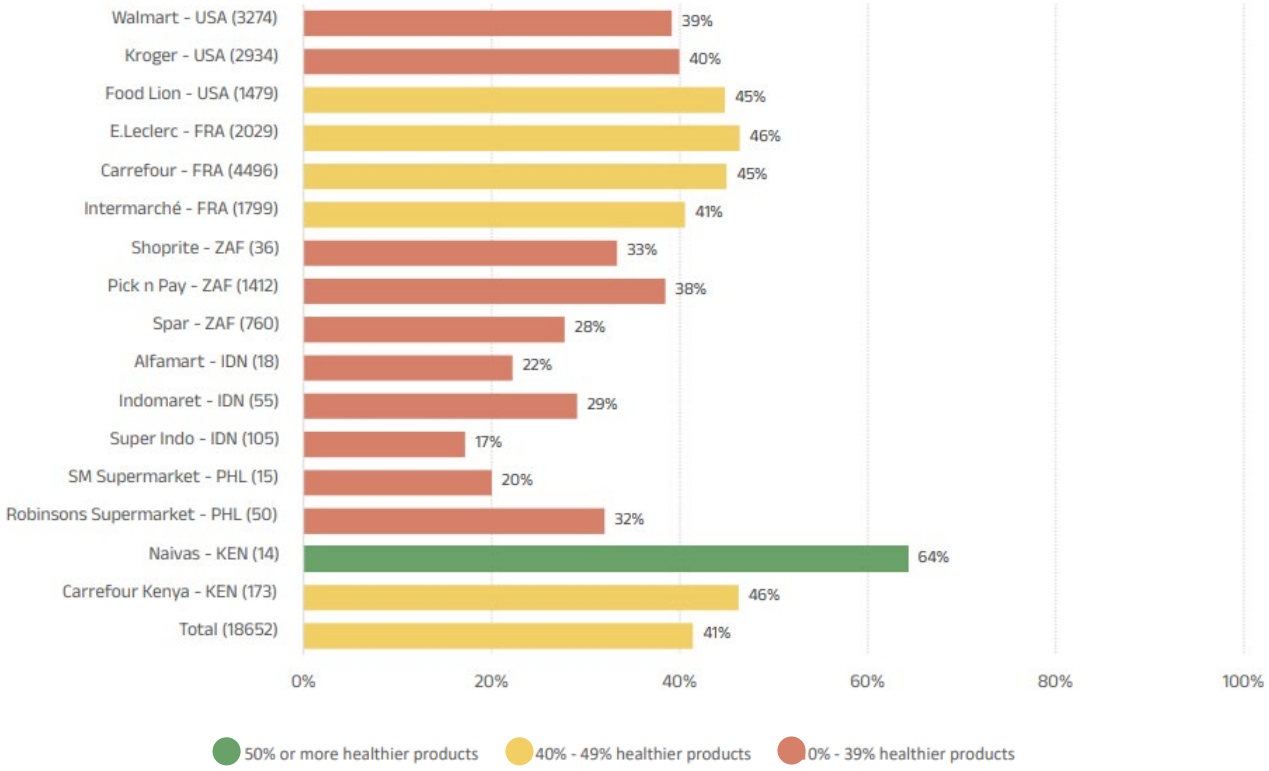
Problem 3: Product healthiness is low everywhere, for both branded and retailer's own brands

Portfolio healthiness is lowest in LMICs (Mean HSR 1.8)



Source: 2024 Global Access to Nutrition Index; 54,414 products analyzed representing 23% of global market.

Proportion of products in private-label portfolios considered 'healthier' (HSR≥3.5)



Source: 2025 Retail Assessment; Products with 3.5 or more stars out of 5 are generally considered to fit in a healthy diet.

Problem 4: marketing by multinational food companies far outspends public nutrition funding

$79B

Est. annual marketing budgets of the world's largest 30 food and beverage manufacturers

$5.1B

Coca-cola Advertising Budget 2024



Coke ad near school in Dar es Salaam, Tanzania

$4.2B

WHO (total) Budget 2026-2027

$300M

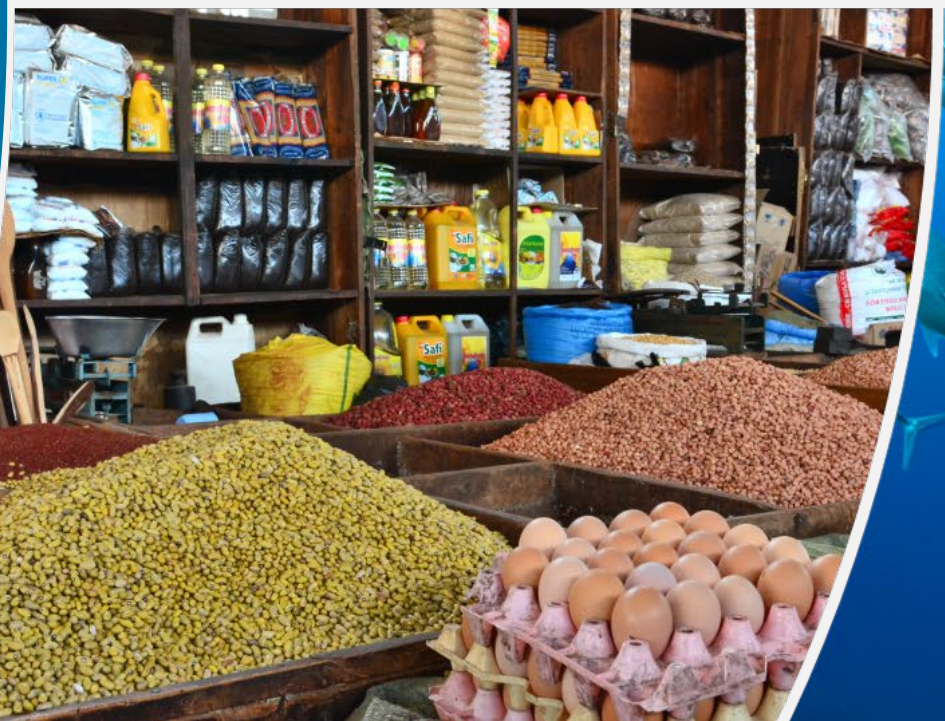
Kenya Food and Nutrition Budgets 2022

Markets follow value, not virtue

The silver lining: the emerging business case for nutrition shows that proven solutions accelerate market transformation. MarketFit Nutrition 2035 focuses on these solutions.









Bridging the micro- and macroeconomic cases for healthier, sustainable foods

Nutrition's Microeconomic Case (weak but emerging)

Nutrition's Macroeconomic Case (well-established, $23 return for $1 invested)

MarketFit Nutrition

Unhealthy food environments

Healthy food environments

Bottom up: Business, investors, consumers

Shorter term: Focus on profits, growth, price

Aspiration: Supply and demand for profitable food products

Responsible Investing/ESG standards

Accountability: Industry benchmarks & targets

Policies & regulations (e.g. fiscal, NPMs)

Pre-competitive initiatives

Blended finance and incentives

Top down: Governments, civil society

Longer term: Focus on society, economy-wide

Aspiration: Healthy, sustainable food products

Healthier foods through country-level incentives and guardrails



Time-bound, multi-country and multi-partner initiative supporting six countries to shape markets so that >50% of food sales are derived from healthier and more sustainable products by 2035.

Objectives

Implement proven approaches at the national level to:

1. Incentivize production of more affordable, healthy and more sustainable foods;
2. Establish smarter regulations
3. Measure and monitor the private sector's contribution to nutrition outcomes.

MarketFit
Innovative
Multi-year
Multistakeholder
Multi-country
Solutions-oriented
Inclusive

MarketFit Nutrition 2035



Timeline

- Phase 1: May 2026 to December 2030
- Phase 2: September 2030–2035

Private sector focus

- Primary: Medium, large and multinational food manufacturers and retailers; out-of-home; B2B, industry associations
- Secondary: micro and small enterprises; tech companies, healthcare providers, investors, insurance and re-insurance companies

Food value chains

- Fortified foods, complementary foods, dairy value chains, overall reformulation of food portfolios

Partners include

APHRC

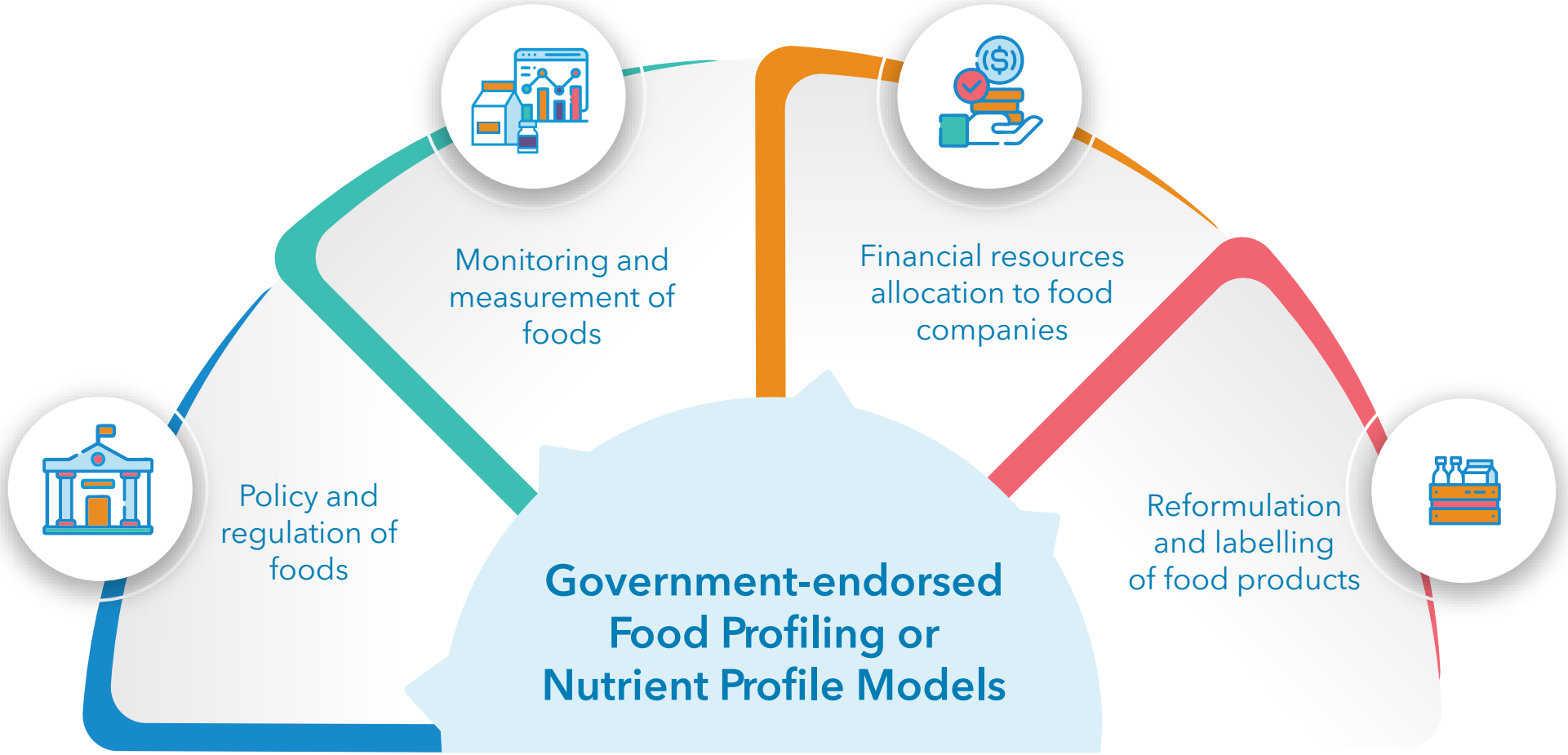
ATNi NUTRITION MARKETS IMPACT (lead)

bop inc

IMPROVED NUTRITION ADVOCACY FOUNDATION

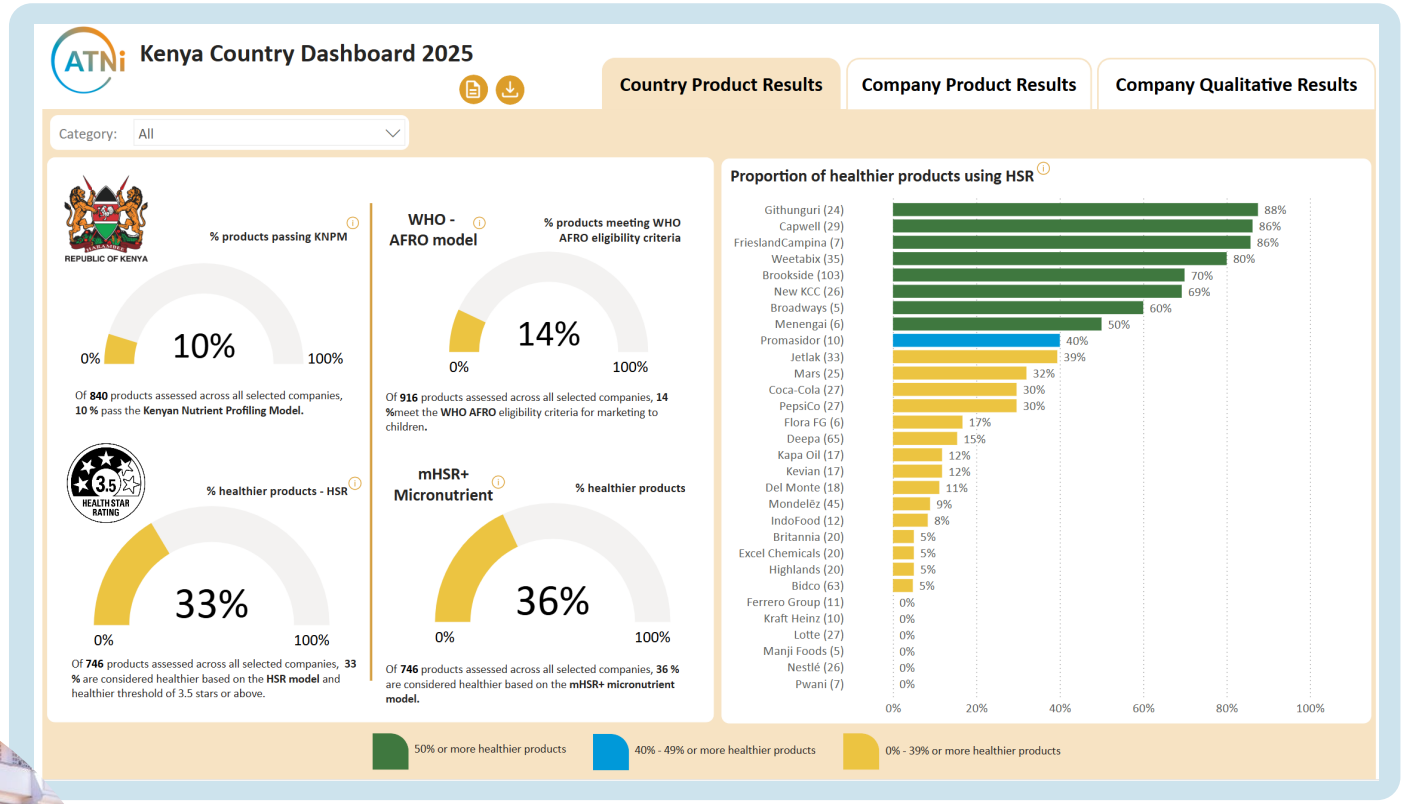
BlueOrchard Impact Investment Managers | ThirdWay Partners

Food profiling leveraged as a foundation for healthier, more sustainable food environments



MarketFit Nutrition Kenya Baseline

- First-ever assessment of modern food retail in Kenya completed in July 2025
- 90% of products do not meet Kenya health standards
- ATNi, APHRC and other stakeholders are working with government to establish local platform and actions for private sector improvements





Kenya's Cabinet Secretary requested a policy briefing from ATNi. This work has laid a foundation for a broader partnership in Kenya to enhance the country's capacity to shape healthier food environments.

MarketFit Nutrition 2035: a multi-partner, multi-country initiative towards healthier and sustainable food environments

Cross-cutting Innovation: Data Hub

I. National/Local Industry Accountability:
monitoring, tools, and knowledge transfer



II. Investments & Financing:
collaborative engagements, ESG metrics, pipeline, debt fund

IV. Policy & Regulatory Environment:
market-shaping policy support

III. Business Models & Demand Creation:
Product portfolios and precompetitive initiatives

Partners

I. ATNi Nutrition Markets Impact; Improved Nutrition Advocacy Foundation

II. BlueOrchard Impact Investment Managers; ThirdWay Partners

III. bop inc

IV. APHRC

Local partners

Progress so far

Programmatic

- MarketFit East Africa inception underway (Waterloo Foundation, Gates Foundation, SDC)
- Government buy-in in 4 target countries

Governance

- Steering Committee established with representation from each pillar partner
- Consortium agreements developed and signed with partners

Fundraising

- Design funding secured (Gates Foundation, UK FCDO); East Africa inception (Waterloo, SDC)
- Grant for MarketFit health impact modelling for two countries (with local academic partners) being secured
- Discussing MarketFit Nigeria and N774 support

MarketFit Nutrition 2035: Funding Status

Secured so far (2026-2027)

- **€1.52 million** signed
- **€2.18 million** expected by December 2026

Funding gap (until end 2028): €5.6 million

- **Nigeria:** €2.3 million (assessments and industry engagement)
- **Indonesia:** €2.1 million (assessments, policy and industry engagements)
- **Kenya and Tanzania:** €1.2 million (ongoing policy, investor and industry engagement)

Funding is shared across MarketFit Nutrition consortium partners and partners on the ground in each country.

Gates Foundation

the waterloo foundation

Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
Confederaziun svizra

Swiss Agency for Development and Cooperation SDC

UKaid
from the British people



Amos Laar

Professor of Public Health Nutrition, University of Ghana

THE GHANA DOUBLE-DUTY NUTRIENT PROFILING SYSTEM

Policy Case Study: Nutrient Profile Models in Practice – Lessons from Ghana

Professor Amos Laar
School of Public Health, University of Ghana. E- alaar@ug.edu.gh / X - @alaar

FORUM THEME: MARKETFIT NUTRITION DIALOGUE #3
Convened by: ATNi (Access to Nutrition initiative), Stronger Foundations for Nutrition, and the Gates Foundation

12 November 2026, online



01

The Ghana Double-Duty NPS



01

INTRODUCTION

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DEVELOPMENT OF THE GHANA DOUBLE-DUTY NPS

03

APPLICATION OF THE GHANA NPS



04

IMPLEMENTATION ARRANGEMENTS, MONITORING AND EVALUATION OF THE GHANA NUTRIENT PROFILING SYSTEM (NPS)

05

CAPACITY BUILDING AND COMMUNICATION

06

STRENGTHS AND LIMITATIONS OF NUTRIENT PROFILING

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GLOSSARY

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APPENDICES

Source: Ministry of Health & Food and Drugs Authority, Ghana Double-Duty NPS, 2025

One food system, multiple forms of malnutrition

Nutrition deficits persist

18% child stunting

6% child wasting

49% anaemia in children under five

41% anaemia among women

50% Overweight/obesity in WIFA

Diet-related risks rise

Food environments increasingly expose people to products high in sugars, sodium, saturated fat and industrial trans fat.

The same population can experience micronutrient inadequacy and rising overweight or NCD risk across the life course.

MOTIVATION FOR THE DOUBLE-DUTY DESIGN

Double duty philosophy

Nutrition. Markets. Impact

A double-duty action has the potential to reduce two or more forms of malnutrition through the same policy, programme or regulatory measure.

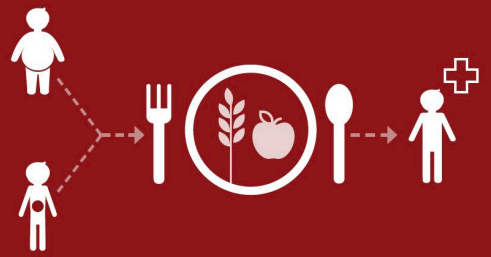
WHO/NMH/NHD/17.2

Double-duty actions for nutrition

Policy Brief

Addressing contrasting and confounding forms of malnutrition need not be a zero-sum game

Double-duty actions have the potential to improve nutrition outcomes across the spectrum of malnutrition, through integrated initiatives, policies and programmes



ig. 5. Three levels of doing double-duty



ATNi

Nutrition problems that share causes should be governed together.

Sources: WHO (2017); Hawkes et al. (2020).

Policy bundling

Nutrition. Markets. Impact

ATNi

+
OTHER APPLICABLE POLICIES

FRONT-OF-PACK LABELLING

Makes nutritional quality or lack thereof visible

MARKETING RESTRICTIONS

Reduces persuasive exposure, especially for children

GHANA'S DOUBLE-DUTY NUTRIENT PROFILE SYSTEM

FISCAL MEASURES

Change relative prices and can mobilise public-health revenue

PUBLIC FOOD PROCUREMENT

Changes the default offer in schools and public institutions through procurement

TRANS FATTY ACIDS ELIMINATION POLICY

Eliminate, replace, ban

Nine principles shaped the Ghana NPS

01

Context-specific and evidence-driven

02

Government-led

03

One nationally mandated system

04

Feasible under implementation constraints

05

Adaptive as evidence and markets change

06

Transparent, accessible and inclusive

07

Double-duty in design

08

Promote healthier diets, enhance nutrition, and support sustainability.

09

Accessible once applied to policies such as FOPL

10: Meaningful and ethical stakeholder engagement as per national laws

The Development of the Ghana NPS

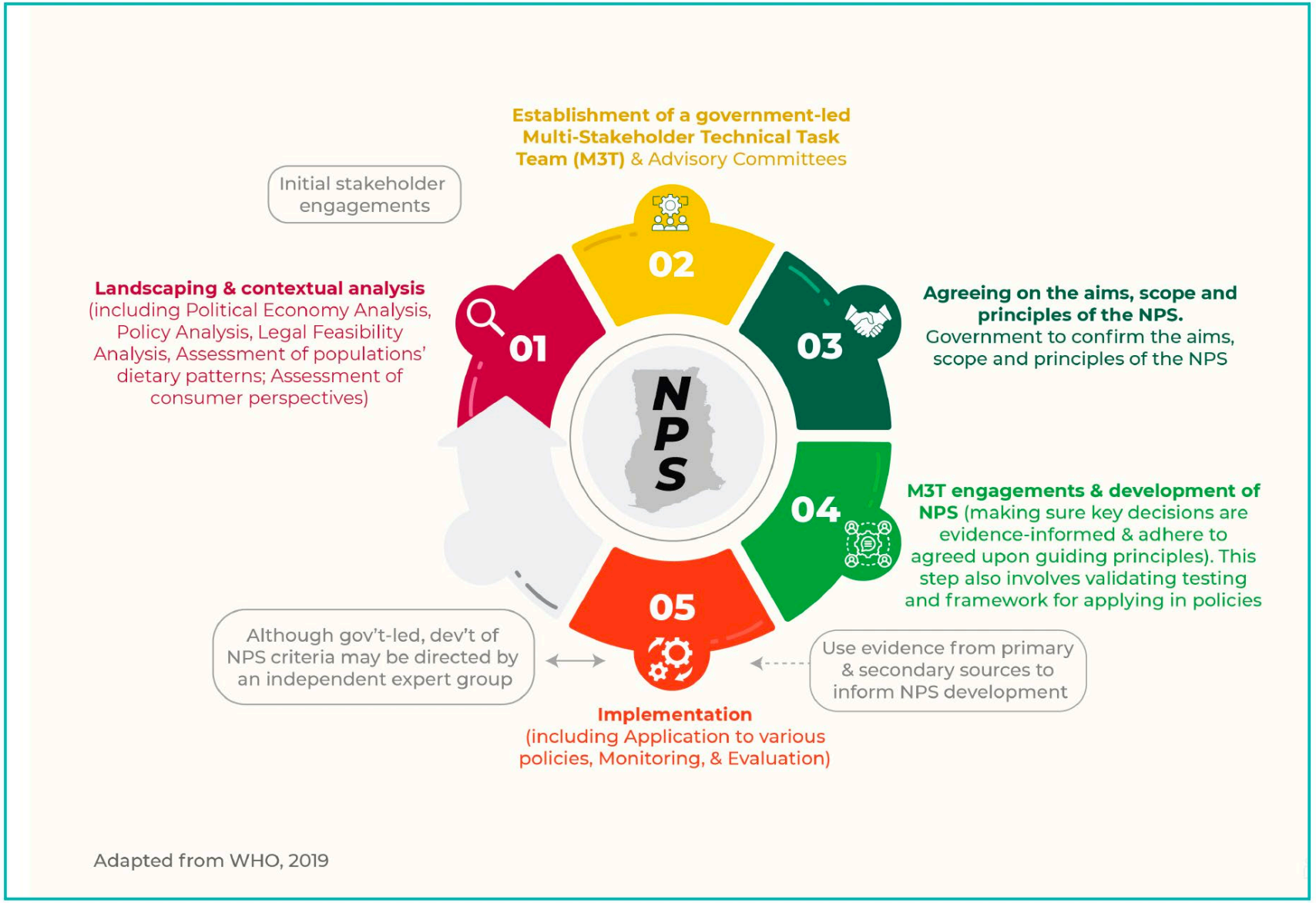


Fig1. Steps in the development and implementation of the Ghana NPS

Evidence, adaptation and Ghanaian food data

Structured model review

135 models identified

25 met double-duty criteria

16 unique models after deduplication

5 retained for comparison

2 foundational models

WHO AFRO nutrient thresholds

Food Compass holistic scoring

>10,000 foods and beverages reviewed

≈6,400 foods used in model development

A hybrid system that helps to answer different policy questions

1 Threshold or cut off points

Does the product exceed a limit for a nutrient or food component of public health concern?

- A warning or restriction follows when a threshold is exceeded
- The threshold-informed warning label takes precedence over the positive score

2 Holistic score

How health-promoting is a product that passes the threshold screen?

- The score guides promotion, subsidy and procurement priority

Thresholds protect against specific risks. Scoring recognizes overall food quality or healthfulness.

The threshold screen focuses on six concerns

TOTAL SUGARS

Category-specific

SODIUM

Category-specific

SATURATED FAT

Category-specific

iTFA / PHO

WHO-aligned product guidance

NON-SUGAR SWEETENERS

Any amount

ULTRA-PROCESSING

NOVA Group 4 flag

The Ghana NPS excludes total fat and added sugar as thresholds.
The model uses saturated fat, total sugars and processing indicators.

Holistic scoring supports positive policy choices

8 domains **49 attributes** **1–10 score**

The score considers nutrient ratios, vitamins, minerals, food ingredients, additives and processing characteristics.

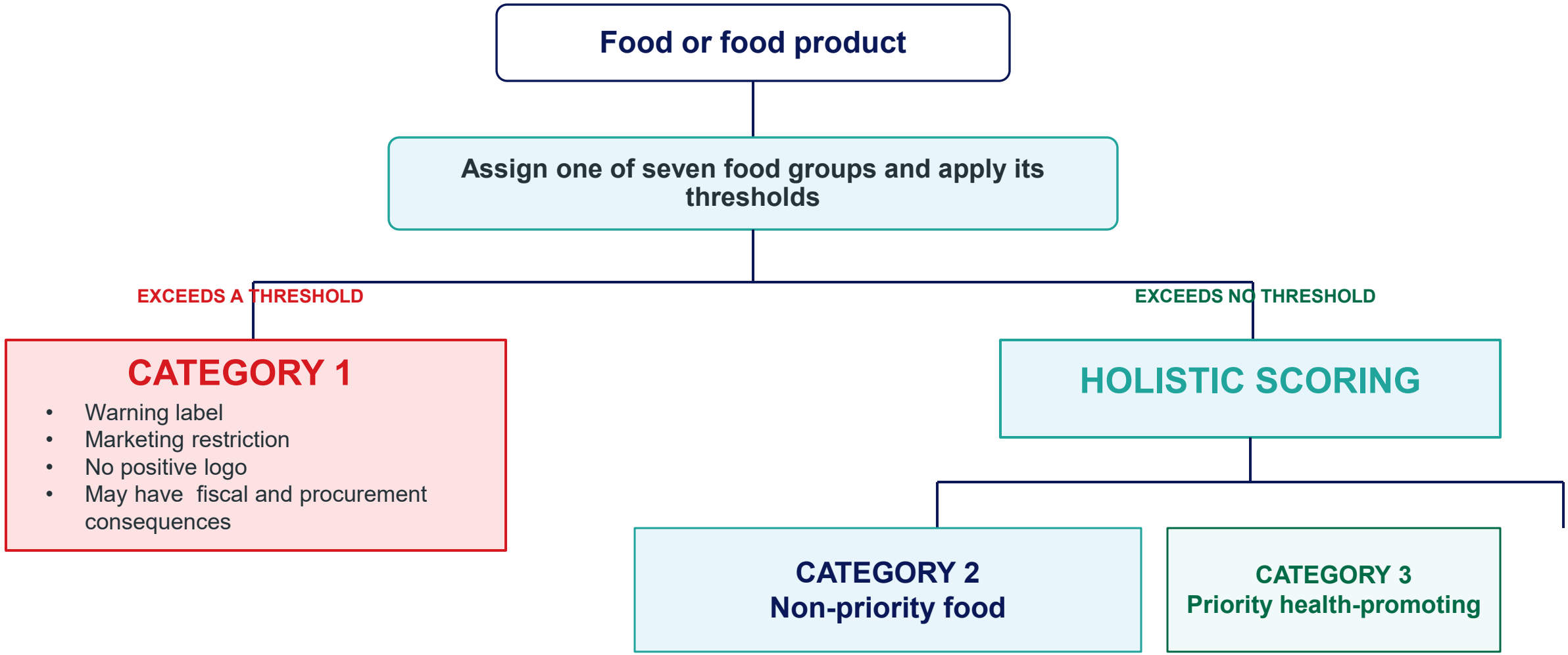
≤3.0 DISCOURAGE	3.1–6.9 CONSUME IN MODERATION	≥7.0 ENCOURAGE

Eligibility condition

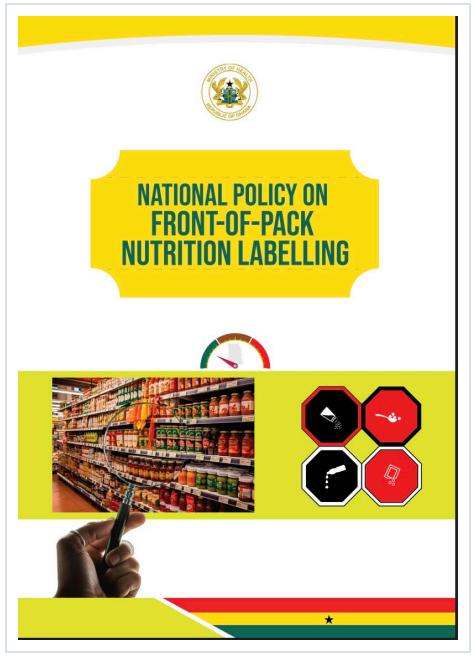
These two thresholds are NOT applied concurrently with the WHO thresholds

A score of 7 or above supports positive treatment only when the product carries no warning and exceeds no threshold.

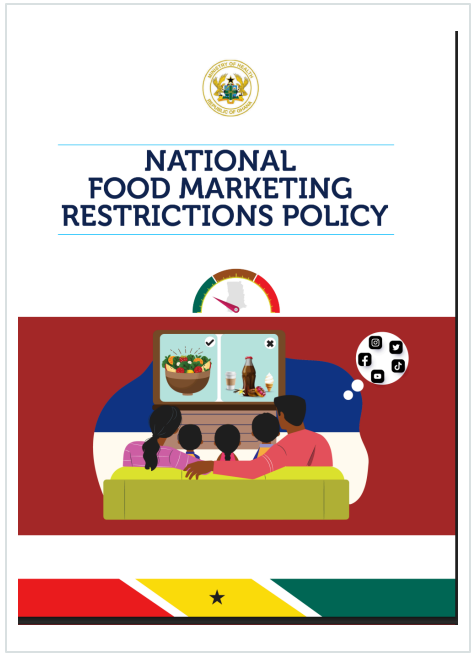
One decision pathway serves multiple policies



Four policies use the same NPS classification



Warn // promote



Restrict // promote



Tax or subsidize



Procure // deprioritize

A bundle. Consumers see it, marketers face it, fiscal policy reinforces it and public purchasing creates demand for compliant foods.

03

APPLICATION OF THE GHANA NPS



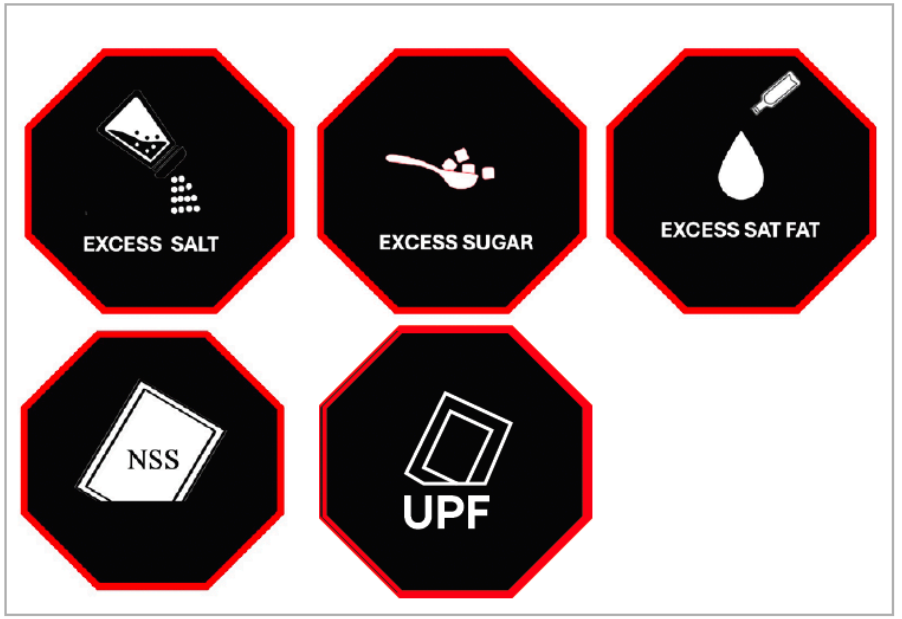


Figure 4a. Proposed FOPL Warning Labels, Ghana

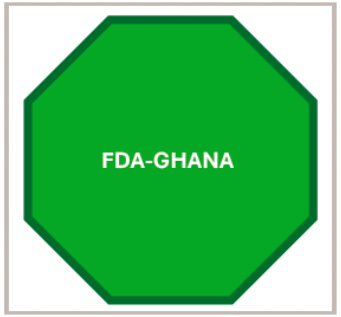


Figure 4b. Proposed FOPL Positive Label, Ghana





"If you can't fly, then run; if you can't run, then walk; if you can't walk, then crawl; but by all means, keep moving." _ Martin Luther King Jr.

Thank you + Acknowledgments

CAPHA Coalition of Actors for Public Health Advocacy
HD4HL Healthier Diets 4 Healthy Lives
World Health Organization
Tufts University
IDRC · CRDI
Canada
The Rockefeller Foundation





Uju Rochas-Anwukah

Senior Special Assistant to the President on Public Health and Focal Person on Nutrition in the Office of the Vice President of Nigeria

NIGERIA SPOTLIGHT

From dialogue to delivery

Private-sector engagement for nutrition under the Nutrition 774 (N774) Initiative

PRESENTER

Uju Rochas-Anwukah

Senior Special Assistant to the President on Public Health, Focal Person Nutrition, Office of the Vice President

EVENT

MarketFit Nutrition 2035 Dialogue #3: Guardrails and Incentives for Better Nutrition

Co-convened by the Gates Foundation and Stronger Foundations for Nutrition · 12 November 2026

NUTRITION 774 INITIATIVE

THE CHALLENGE

A triple burden of malnutrition

40%
of children under five are stunted; 8% are wasted

47%
of women of reproductive age are anaemic

79%
of Nigerians cannot afford a healthy diet

Micronutrient gaps fortification can close

35%	of young children zinc-deficient
31%	of young children vitamin A-deficient
26%	of pregnant women iron-deficient
91%	of women folate-deficient
13–30%	of women consume fortified staples

Diet risks reformulation can reduce

10g	salt a day: double WHO's 5g limit
41%	of children 6–23 months have sweet drinks
30%	of women 20–49 overweight or obese
36%	of adults 30–79 have hypertension
Rising	diet-related NCDs as diets shift

> Food inflation is pricing nutritious foods beyond vulnerable families, and value is lost when raw produce is exported and processed ingredients imported.

Sources: NDHS 2023–24 (stunting, wasting, anaemia, sweet drinks, overweight); NFCMS 2021 (micronutrients, fortified foods); FAO SOFI 2024 (healthy diet); salt and hypertension as cited in the National Policy on Food and Nutrition 2026–2035 · 2

NUTRITION 774 INITIATIVE

THE POLICY FOUNDATION

The private sector is written into national policy

National Policy on Food and Nutrition 2026–2035

Role: mobilise investment, innovation and technology for nutritious foods; support MSMEs; bring expertise in quality, supply chains and scale.

Industry is asked to

- Fortify foods with vitamin A, B vitamins, zinc, iron and calcium
- Make low-cost nutritious foods and RUTF
- Manufacture nutrition commodities locally
- Cut salt, sugar and fat through R&D

Government commits to

- A national nutrient profiling system
- Front-of-pack labelling
- Lower duties on premix and healthy foods
- Procurement incentives and PPPs

2035 targets: ≥80% of people eating fortified staples · salt ≤5g a day

National Food and Nutrition Bill

Approved by the Federal Executive Council for transmission to the National Assembly, to give nutrition policy the force of law

A seat at the table

The private sector (NESG, NACCIMA) and the Industry Minister sit on the National Council on Nutrition, chaired by the Vice President

Source: National Policy on Food and Nutrition 2026–2035, Federal Ministry of Budget and Economic Planning · 3

N774 AND THE ROUNDTABLE

A core delivery arm of N774

Moving beyond corporate social responsibility to investments that make business sense and improve nutrition across all 774 LGAs

LEADERSHIP

Nutrition 774 Initiative

Led by the Office of the Vice President across all tiers of government

→

PRIVATE-SECTOR ANCHOR

Federal Ministry of Industry, Trade and Investment

Ministerial leadership and commitment secured

→

THE MARKET

Industry, MSMEs and finance

Manufacturers, processors, associations and financiers

KEY ROUNDTABLE OUTCOMES

- Nutrition reframed as industrial competitiveness and human capital, not a cost to business
- Regulators, financiers and industry aligned behind one national agenda
- Alignment on a national framework for private-sector engagement and accountability
- From dialogue to delivery: time-bound actions with named owners

NUTRITION 774 INITIATIVE

THE OPPORTUNITY FOR THE PRIVATE SECTOR

Good for people, good for business

57%
of household spending goes on food: ₦22.7 trillion a year

36.6%
of manufacturing output is food, beverage and tobacco, the largest group

39.6m
MSMEs, the backbone of food processing and retail

US$23
returned for every US$1 invested in nutrition (World Bank)

Fortified staples and premix
Flour, sugar, oil and salt, plus local premix production

RUTF and complementary foods
Made in Nigeria for Nigerian children

Farm-to-factory value
Local peanuts, onion powder and biofortified crops replacing imports

Alternative proteins
Affordable protein for growing urban demand

774 LGA supply chains
Steady local demand through N774 programmes

A regional hub
Healthier portfolios competing across AfCFTA

Sources: NBS Consumption Expenditure Pattern 2019; NBS GDP report Q2 2026; SMEDAN/NBS MSME Survey 2021; World Bank · 5

NUTRITION 774 INITIATIVE

STANDARDS AND INCENTIVES

A level playing field that rewards healthier products

Clear standards, consistently enforced, create fair competition. Businesses that invest in healthier products should never be at a disadvantage.

Standards set the floor

- **In place:** trans-fat limit of 2g per 100g of fat or oil (NAFDAC, 2022), with a national strategy now in force
- **In place:** mandatory fortification of staples such as flour, sugar, vegetable oil and salt
- **Next:** sugar and sodium reduction targets
- **Next:** front-of-pack labelling, building on NAFDAC's rules
- **Next:** a complementary food standard and a NAFDAC-verified premix registry

Incentives reward going beyond it

- **Finance:** BOI pilot cohort; women-focused facility from ~5–7%; ₦250bn raised, ₦75bn already lent to manufacturers
- **Blended finance:** PVAC–BOI–NSIA fund (in design); JICA–BOI two-step loan
- **Technical support:** investment-readiness help for SMEs
- **Tax and tariff incentives:** for compliant premix producers and reformulation
- **Procurement and recognition:** nutrition-sensitive public buying; public promotion of top performers

Sources: NAFDAC Fats and Oils Regulations 2022; Bank of Industry presentation to the roundtable; roundtable recommendations · 6

NUTRITION 774 INITIATIVE

PARTNERSHIP IN ACTION

The agreed roadmap and what industry commits to

Ongoing

Nationwide mapping led by OVP and FMITI: anchor partners, current activity, investment opportunities, barriers

Next

Tier firms by finance, regulatory and infrastructure need

~8 months

Company Assessment: ATNi's 80+ indicators; dairy first

Next dialogue

Farmers and FMAFS join, covering the full value chain

The mapping guides how we engage businesses, link them to finance and hold them accountable for their commitments.

INDUSTRY COMMITS TO

- **Reformulate** beyond the minimum
- **Market responsibly** to children, in line with WHO
- **Report openly** through the Company Assessment
- **Link MSMEs** into supply chains
- **Co-invest** in consumer education

NUTRITION 774 INITIATIVE

THE ANCHOR

Finalising Nigeria's Nutrient Profile Model

When we call a food healthy, there must be one agreed definition, based on scientific evidence.

NPM

Advanced stage; led with FMHSW, ATNi and INAF

Manufacturers

Know exactly what to work towards before they invest in reformulation

Policy

Guides front-of-pack labelling and limits on marketing unhealthy foods to children

Incentives

Defines which products qualify for finance, tax relief and public procurement

OUR CALL TO ACTION

Industry · shape it

Join the consultation, then reformulate and report against it

Financiers · invest to it

Use NPM criteria to target concessional and blended finance

Partners · help finish it

Technical support to validate, adopt and embed it in law

NUTRITION 774
INITIATIVE

Thank you

Better Nutrition. Stronger People. A Prosperous Nigeria.

WITH THANKS TO OUR PARTNERS

Federal Ministry of Industry, Trade and Investment
Gates Foundation
Stronger Foundations for Nutrition
ATNi
GAIN
GIZ
World Bank
UK FCDO
Embassy of the Netherlands
JICA
UNICEF
WFP
FAO
BoP Innovation Center
INAF
FHSA
CS-SUNN

Uju Rochas-Anwukah · Senior Special Assistant to the President on Public Health, Focal Person Nutrition, Office of the Vice President

GB FOODS | Africa

Arthur Ramoroka

Nutrition Manager,
GBFoods



GB FOODS | Africa

GBfoods Africa Fortification Journey

12 November ‘26



Who we are: Agrolimen is today a 2.5Bn€ business, organized around Gbfoods Africa and 3 other Strategic Business Units

Nutrition. Markets. Impact

	Human food		Pet food	
	GB FOODS Europe	GB FOODS Africa	affinity	Instinct THE RAW BRAND / Ollie
Business Size	~2/3		~1/3	
Main categories	Soups, Sauces, Taste Enhancers and Noodles	Taste Enhancers, Tomato and Mayonnaise	Kibble, Wet, Freeze Dried/ Frozen Raw and Home Cooked	Kibble, Wet and Freeze Dried/ Frozen Raw
Geographies	Europe	Africa	Europe	USA, China
Employees	~1,500	~2,800 *(plus >1,000 ext.)*	~1,200	~400
Factories	12	7+1	4	1
Key Brands	Gallina Blanca, STAR, Liebig, Erasco, dl, TIGULLIO, YATEKOMO	Gino, JUMBO, linguère, BAMA, DIDI, TAMA	ultima, ADVANCE, Nature's Variety, Natural TRAINER, Natures Menu, Dogfy Diet	Instinct, WE FEED RAW PET FOOD CO.

ATNi

GBfoods Africa Impact Strategy: Three differential systemic-change levers supported by foundational core elements

Nutrition. Markets. Impact

ATNi

SOURCING LOCALLY



PROCESSING & PRODUCING LOCALLY



FORTIFYING & IMPROVING EVERYDAY DIETS



Focus of Today



EMISSIONS (INGREDIENTS, FACTORIES, PACKAGING & LOGSITICS) + **LAND & WATER USE** + **HUMAN RIGHTS**



“Our ambition is to **reduce malnutrition in Africa** by leading **category-wide meaningful fortification** on our **core categories, starting** with **bouillon cubes,** given its **large-scale consumption** and **systemic impact potential.”**

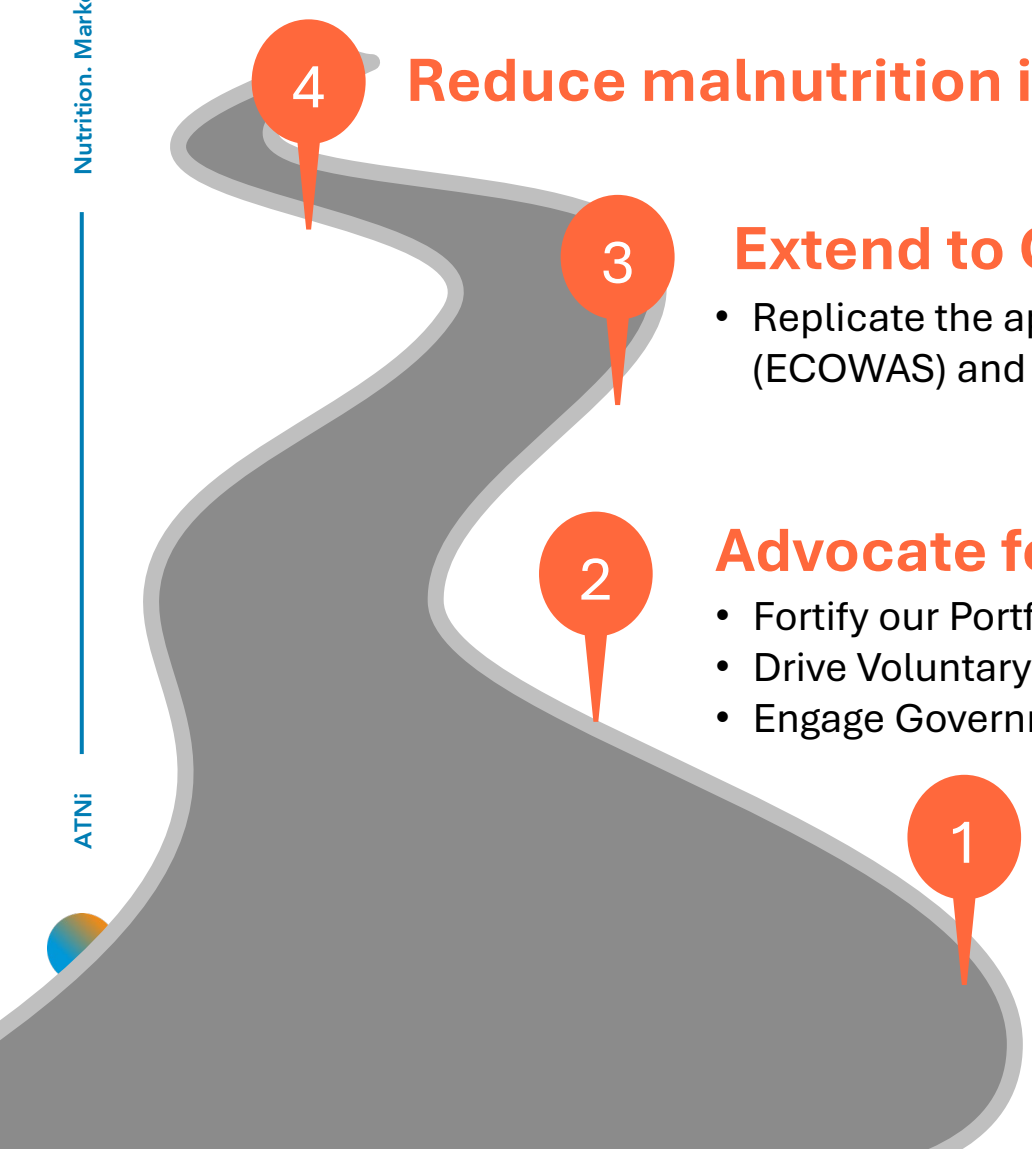
Nutrition. Markets. Impact.

ATNi

Our approach to drive Mandatory Fortification across countries & categories, together with institutions and industry players

Nutrition. Markets. Impact.

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4 Reduce malnutrition in Africa

3 Extend to Other Geographies

- Replicate the approach from one country to the others (ECOWAS) and other markets where we are present

2 Advocate for Fortification

- Fortify our Portfolio (tomato, mayo, cubes)
- Drive Voluntary Industry Fortification
- Engage Governments for Mandatory Fortification

1 Build a Coalition based on a Scientifical Approach

- Technical Assessments, Modelling, Clinical Trials (e.g. UC Davis, University of Ghana, Hellen Keller International)

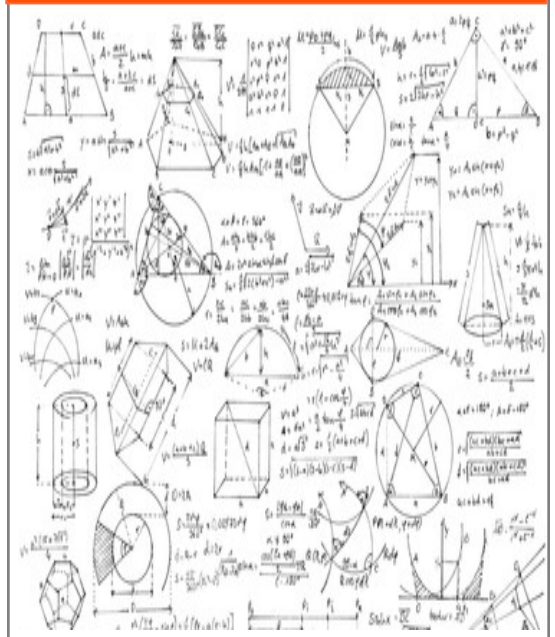
Recent milestones: we fortified our portfolio, built mathematical models, ran clinical trials and opened government talks

Nutrition. Markets. Impact.

Our Fortified Portfolio



Mathematical Models



Clinical Trials



Government Talks





>100 Million Fortified portions per day in 2026

GF · HELEN KELLER INTL · UCDAVIS · GroundWork · CSIRO · RISE · HYSTRA hybrid strategies consulting · Newcastle University · PennState · UNIVERSITY OF GHANA · GB FOODS · Industry Players

ATNi

GB FOODS | Africa



IMPROVED
NUTRITION
ADVOCACY FOUNDATION

Adedotun Owolabi

CEO, Improved Nutrition
Advocacy Foundation



ATNi

NUTRITION
MARKETS
IMPACT

Thank You.

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