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FRANCE RETAIL ASSESSMENT 2026

February 5, 2026

CGF Sustainable Retail Summit

Agenda

- **Introductions**

  ATNi; Retail Assessment Aim and Scope

- **Findings**

  From the France Retail Assessment

- **Panel discussion**

  Shaping Healthier Retail Environments

- **Audience Q&A**

- **Closing**

ATNi (Access to Nutrition initiative) in brief

Transforming markets to deliver Sustainable nutrition

Strategic Goal: Half of companies' food & beverage sales derived from healthy products by 2030 contributing to healthy diets for all. (Global baseline is 31%)

- Founded in 2013 as not-for-profit
- No funding accepted from the food industry to ensure independence
- Donors include Gates Foundation, UK FCDO, Rockefeller Foundation
- Independent Board
- Expert Groups advise on approach (pro bono)
- 22 staff plus several in-country consultants
- New strategy 2023-2027

Alliances and Partnerships to Sustain Impact

Introducing our partners on today's launch

Paris Peace Forum

- Platform for convening key decision-makers and fostering collaboration between governments, international organizations, businesses, and civil society
- Foster dialogue and incubate policy and projects ranging from AI, youth and women empowerment, agriculture and nutrition
- Nutrition for Growth (N4G) Summit with ATNi in Paris 2025

Réseau Action Climat

- Network of 27 national and 10 local associations in France committed to addressing climate change, environmental, and equitable transitions.
- Focus on climate action and equity at international and local scales across multiple sectors, e.g., energy, construction, transport and agriculture/ food

ATNi's Research and Tools

F&B manufacturers

Assessing the commitments and performance of the 30 largest food manufacturers globally

Retailers

Assessing 12 largest retailers in the UK, on commitments and performance

ATNi's first multi-country Retail Assessment

South Africa

2025-2026 Retail Assessment

Assessing the strategies and performance of the top 3 retailers in 6 selected countries with varying income levels in improving access to and the affordability of healthier foods and evaluates policies aimed at strengthening healthier food environments.

High income • US • France	Walmart Food Lion Kroger	E.Leclerc Intermarché Carrefour
Upper-middle income • South Africa • Indonesia	Shoprite SPAR Pick n Pay	Alfamart Super Indo Indomaret
Lower-middle Income • The Philippines • Kenya	Puregold Robinsons Supermarket SM	Naivas Carrefour Quickmart

1) Retail Environment Mapping

Map retail market structures, types of food retailers, their geographical distribution, consumer reach, and food retail trends in each of the selected countries

2) Retail Strategies and Performance

For the top 3 retailers in each country:

- Retailer Profile
- Product Profile
- Promotions analysis

3) Pricing and Affordability

Compare the affordability of healthier vs. less healthy retail baskets, in relation to income levels, purchasing power parity (PPP), and other economic indicators per country

4) Policy and Regulatory Gaps

Map current policies, identify gaps and best practices to encourage retailers, institutional investors and policy makers to support healthier food environments

Research Components

See methodology here:

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Findings

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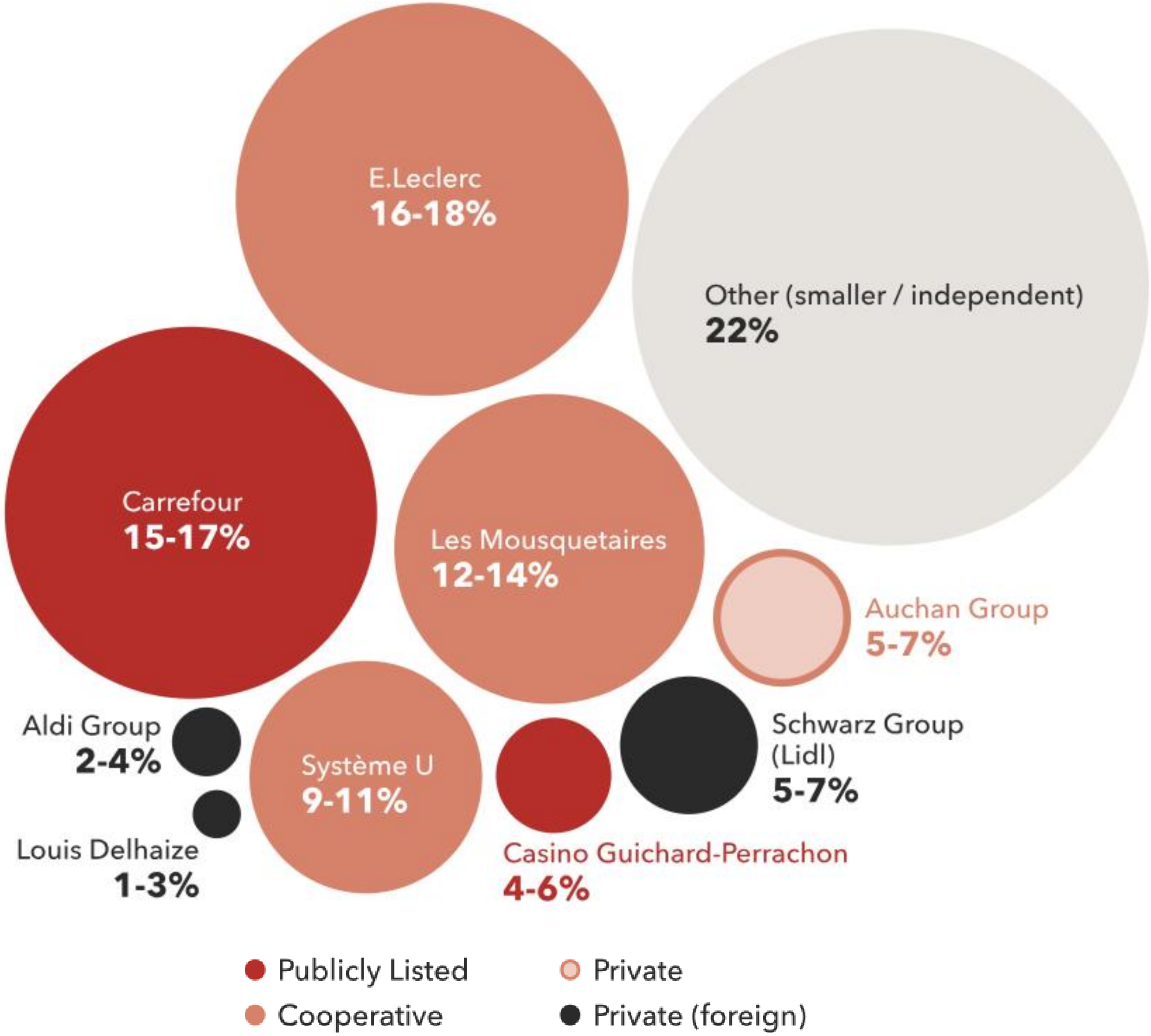
Changing dietary patterns in France

- ± 1 in 10 adults in France living with obesity (9.7%), compared with 15.8% across Western Europe.
- Diabetes rates increasing, now affecting 4 million people.
- Persistent micronutrient deficiencies linked to low consumption of fruits, vegetables, legumes and whole grains.
- Outcomes reflect shifting dietary patterns - increasing consumption of packaged and ultra-processed foods, many of which high in fat, salt and sugar.
  - UPFS: ± 36% of total energy intake (NutriNet-Santé)
  - ↑ ± 20% from 2017 to 2023

Total economic cost of overweight and obesity in France projected to reach more than **€56 billion (2.09% GDP)** by 2030

Source: WorldObesity

Leading retailers have significant influence on diets



- Together, E.Leclerc, Carrefour, and Les Mousquetaires (Intermarché) control almost half the grocery retail market.
- Other retailers, especially budget retailers also show continued growth.
- Private-labels represent a significant (± 38%), and growing share of French grocery sales.
- Beyond French regulations, significant opportunity for voluntary action by retailers.

Source: Euromonitor

Nutrition prioritization across French retailers

Substantially addressed / in place
Partially addressed / in place
No evidence found / Not in place
Not assessed due to regulations

*Provided feedback on Retailer Profile findings

Example: Increasing the visibility of healthy products

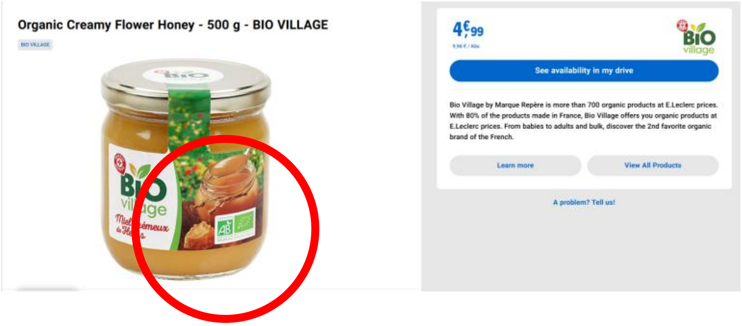
French retailers leading the way on adopting Nutri-Score

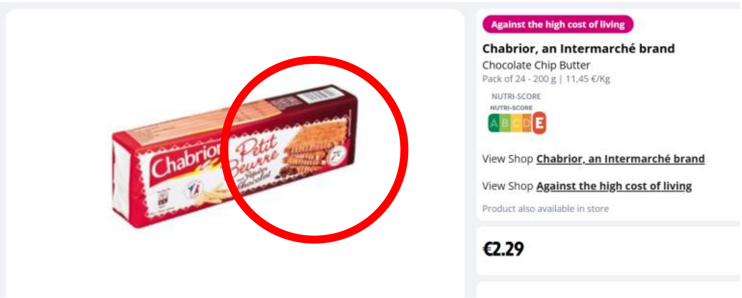
- All three retailers publicly support Nutri-Score, and have applied it to private-label products both on-pack and on e-commerce platforms.
- Efforts made to increase adoption/disclosure by national brands.

But: opportunities for improvement

- Retailers can ensure Nutri-Score is displayed on pack and online across _all_ eligible products.

- None of the three retailers have set public targets to increase the share of sales derived from ‘healthier’ products (e.g. Nutri-Score A/B or A/B/C.





Independent measurement Findings

Product Profile

Evaluate the nutritional quality of private-label packaged foods and beverages, using internationally recognized **Nutrient Profiling Models (NPMs)** to enable cross-country and cross-company comparisons.

Analysis of private-label packaged foods and beverages with **8,324** out of 18,652 (all 6 countries) products for **France:**

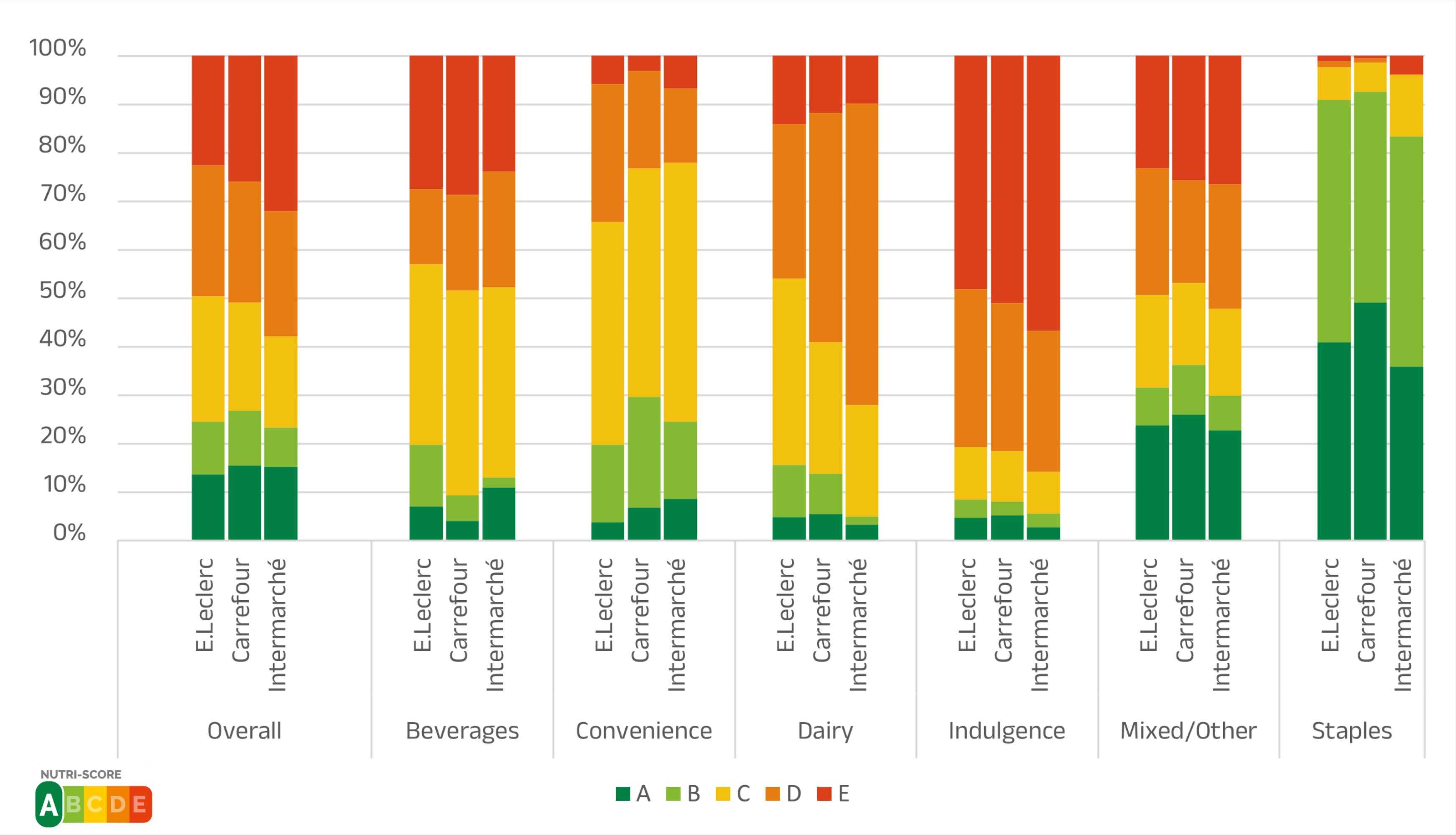
- **E.Leclerc: 2,029**
- **Carrefour: 4,496**
- **Intermarché: 1,799**

Nutrient Profiling

1. Health Star Rating (HSR)
2. Nutri-Score
3. National (South Africa, Kenya) or regional WHO models (Indonesia, the Philippines)
4. High in fat, salt, sugar (HFSS) and/or markers of ultra-processed foods (UPFs) (colors, flavors, or non-nutritive sweeteners)

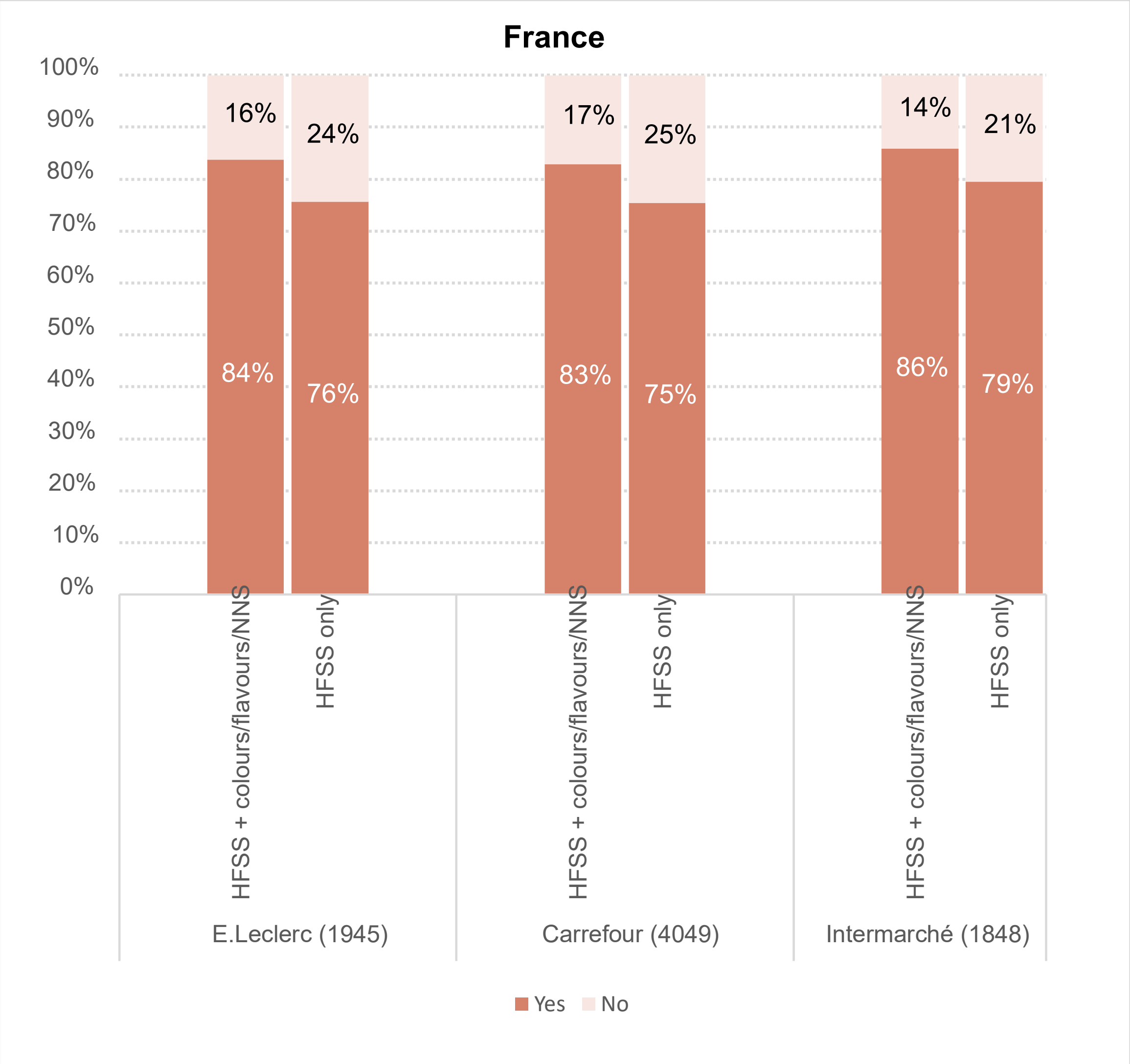
To highlight opportunities for portfolio improvement and responsible marketing

Product Profile – Average healthiness



- Few products are Nutri-Score **A or B (25%)** – in line with the overall assessment across 18 retailers (24%)
- A substantial share remains less healthy **(D or E) (52%)**
- Retailer differences are modest; category patterns dominate

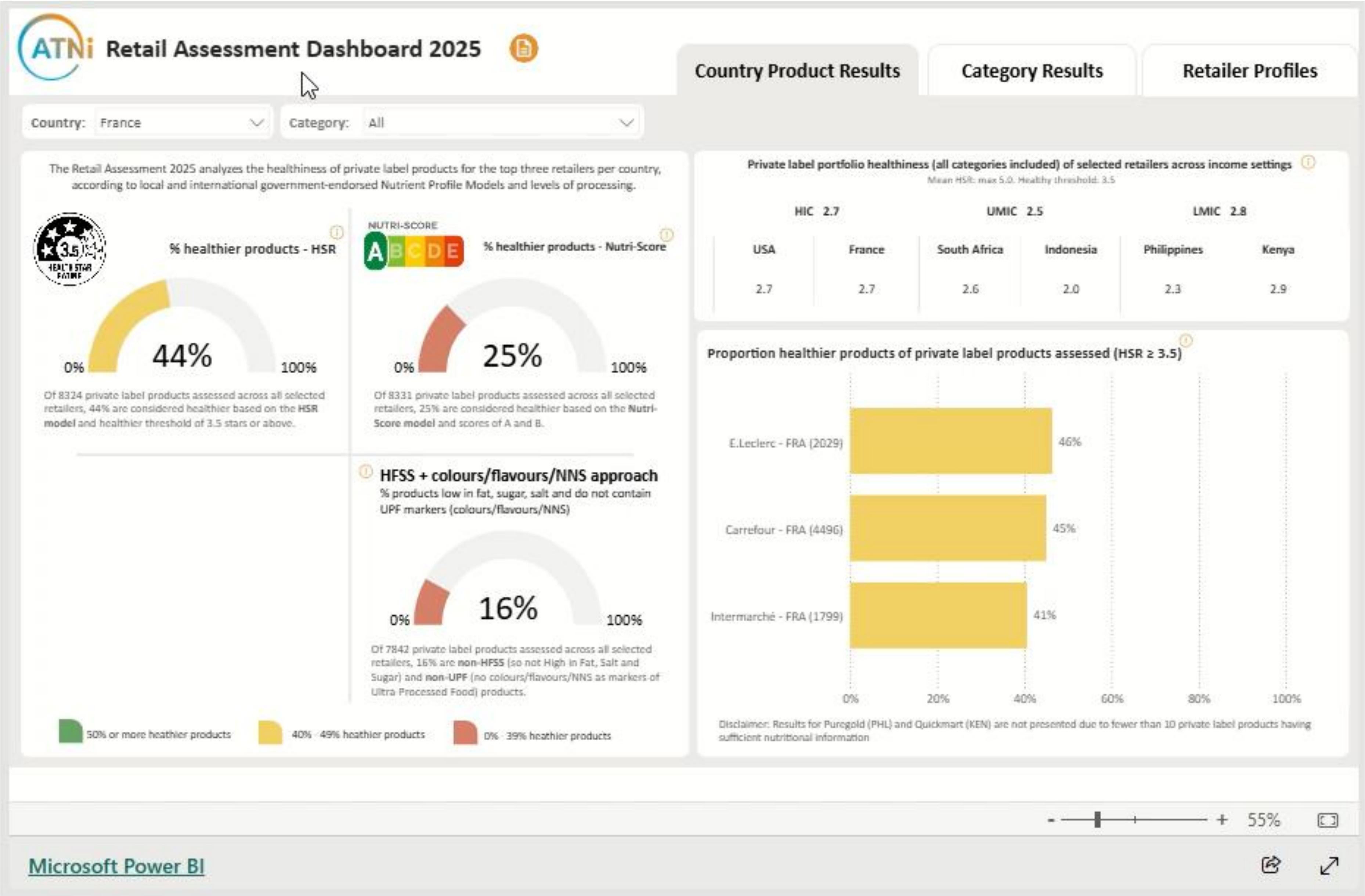
Proportion of products considered unhealthy



- **76%** of the private-label products sold by E.Leclerc, Carrefour, and Intermarché contain **too much fat, salt, and sugar (HFSS)**.
- Over **84%** are **HFSS** and/or contain artificial additives: **colors, flavors, and/or sweeteners**–markers of ultra-processed foods.

Note: the analysis covers packaged food and beverages products. Fresh fruits and vegetables were excluded from the analysis.

Product Profile – Dashboard



Promotion analysis

Objective

- Assess how often healthier vs. less healthy products are promoted in weekly flyers, a prominent marketing tool for retailers.

Global Diet Quality Score (GDQS) framework

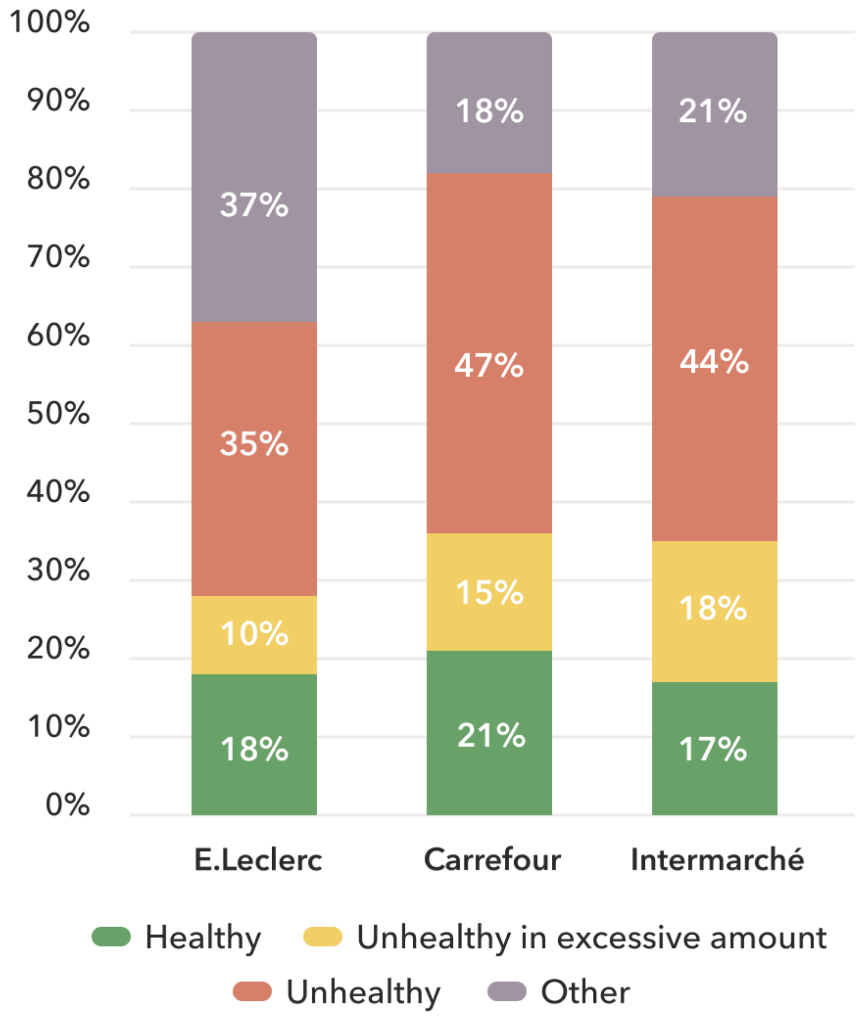
- Products are grouped as: healthy, unhealthy in excess, unhealthy, or other.
- Data collection followed a hybrid approach that combined automated extraction with manual review.

Scope (3-week period)

- In total, **1,204** food products were analyzed from two bi-weekly flyers.
  - **E.Leclerc: ± 200** products per issue
  - **Carrefour: ± 240** products per issue
  - **Intermarché: ± 163** products per issue

Promotion analysis

PERCENTAGE OF FOOD PRODUCTS in catalogues



* Values are rounded to the nearest point

- **Limited healthy promotions:** Less than 25% of flyer space promoted healthy products across all retailers.
- **Unhealthy products dominate:** Sweets and ice cream most promoted, followed by refined grains, baked goods, and snacks.
- **Retailer differences:** modest, with E.Leclerc showing fewer unhealthy food promotions, but more space allocated to items excluded from the assessment, such as alcohol.

Pricing analysis

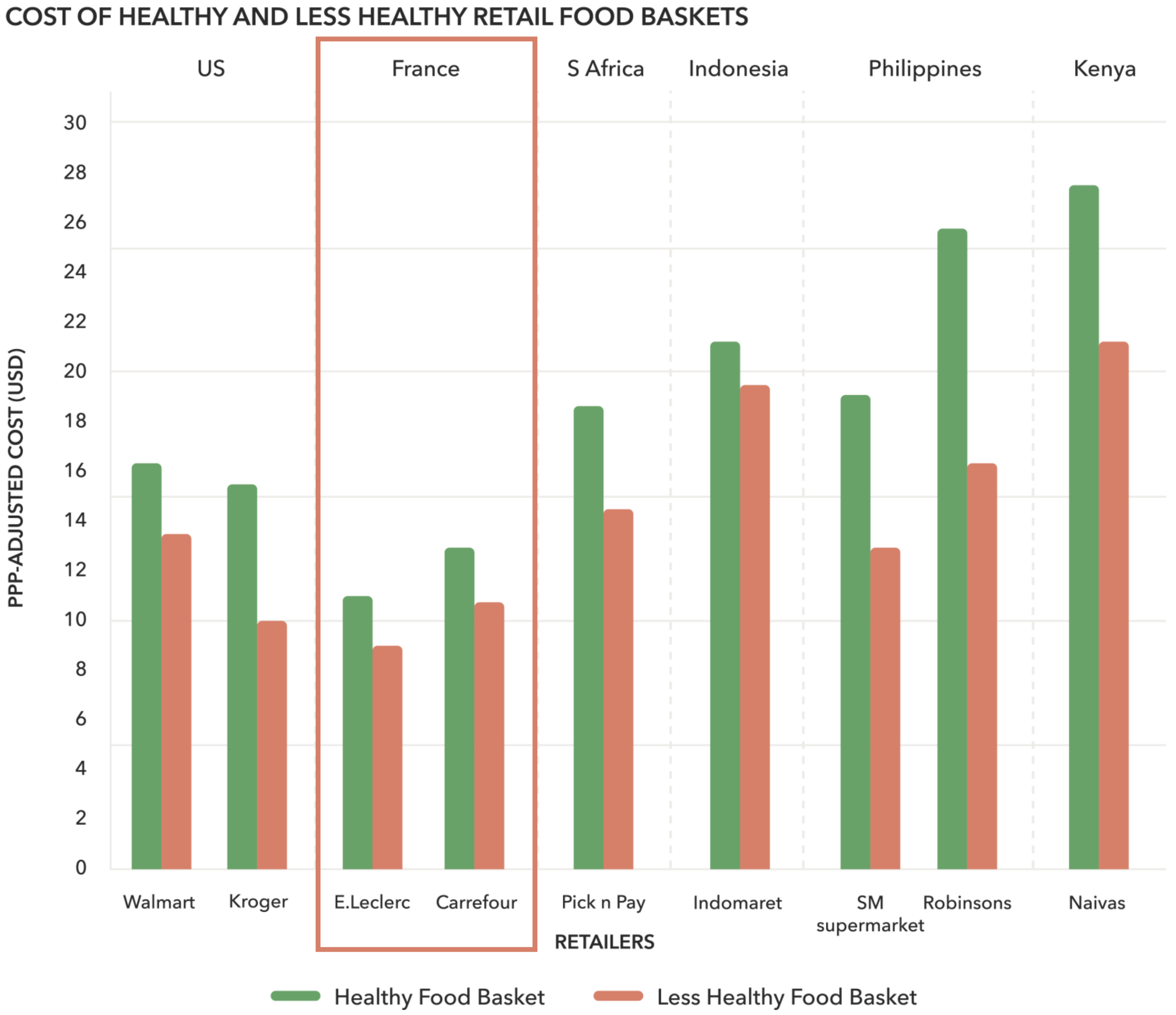
Objective
To compare the cost and affordability of healthier vs. less healthy retail baskets across income levels and countries to assess whether nutritious diets are financially accessible.

Retail Food Basket Approach
Based on the 2019 EAT-Lancet reference diet, ATNi created “healthy” and “less healthy” retail baskets based on recommended food groups and intake levels.

Scope
Pricing data (2024, Euromonitor International VIA Platform) covered 9 retailers across 6 countries, including: **E.Leclerc** and **Carrefour** for France.

Pricing data for Intermarché could not be obtained due to heavy blocking measures on its website.

Price gap



Pricing analysis compared the cost and affordability of healthy vs. less healthy retail food baskets, using the EAT-Lancet Reference Diet:

- **Healthier baskets** were among the **most affordable**, with E.Leclerc offering the lowest-cost healthier basket.
- **Healthier baskets** still require a **higher share of daily income** (9.0–11.1%) than less healthy baskets (7.3–8.9%).
- Highlights the role of **retail pricing strategies** in narrowing price gaps and improving the affordability of healthier diets, even in high-income settings.

Key recommendations

Retailers

1) **Nutrition governance:** Integrate nutrition into ESG frameworks
2) **Set measurable targets:** For sales of 'healthier' private label
3) **Improve portfolio composition:** Set reduction targets for private label products and collaborate with suppliers
4) **Rebalance promotions:** Set targets for and report promotions of 'healthier' products
5) **Responsible marketing**, especially to children
6) **Address affordability gaps**

Policymakers

1) **Introduce comprehensive restrictions on the marketing** of unhealthy food and beverages
2) **Mandate companies to report publicly** on the share of sales derived from healthier products
3) **Raise rates of the existing SSB tax** to increase retail prices of SSBs by at least 20%
4) **Consider additional health taxes** on other discretionary, nutrient-poor food categories

Investors

1) **Integrate nutrition into investment strategies,** make use of ATNi data
2) **Engage with retailers** to set targets for 'healthier' sales, improve nutrition governance, address affordability
3) **Engage with policymakers** and standard-setters

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PANEL DISCUSSION

Shaping healthier food retail environments

PARIS
PEACE
FORUM

Meet the panel

Benoit Granier

Food Lead at *Reseau Action Climat, CAN France*

Agathe Grossmith

CSR Director at *Carrefour*

Remy Medina

Senior Consultant at *International Private Label Consult (IPLC)*

Moderator:

Augustin Grandgeorge at *Paris Peace Forum*

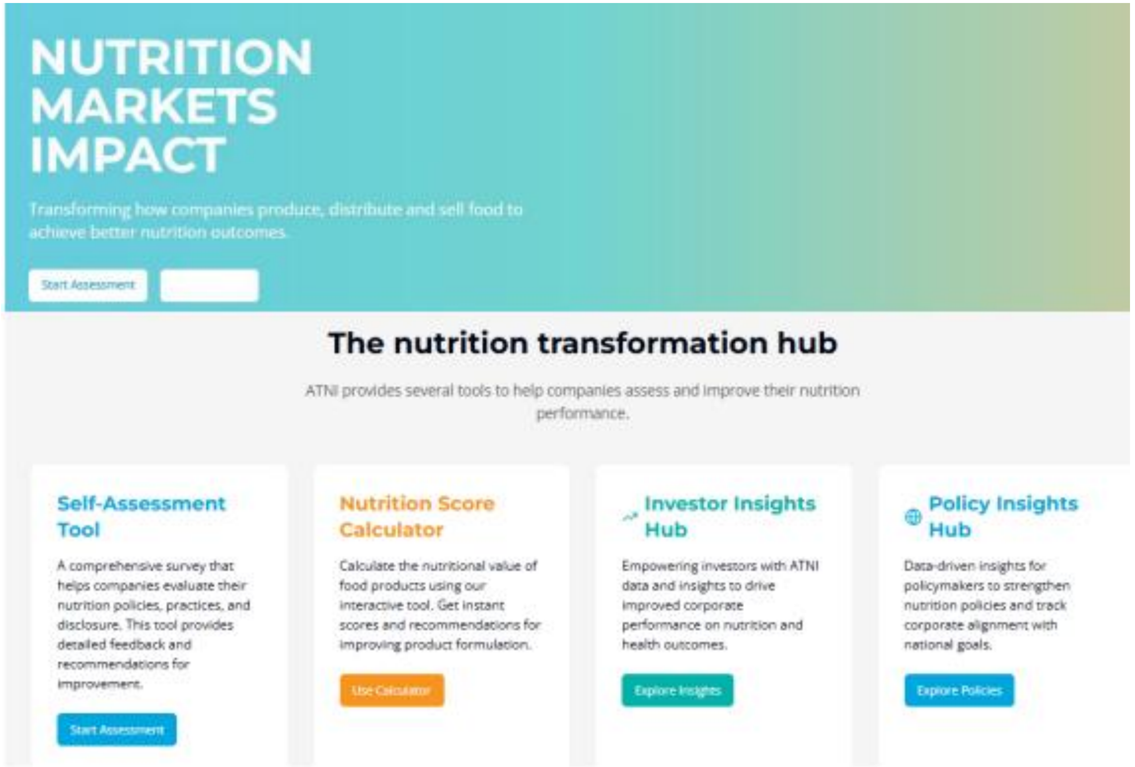
Robert-Alexandre Poujade

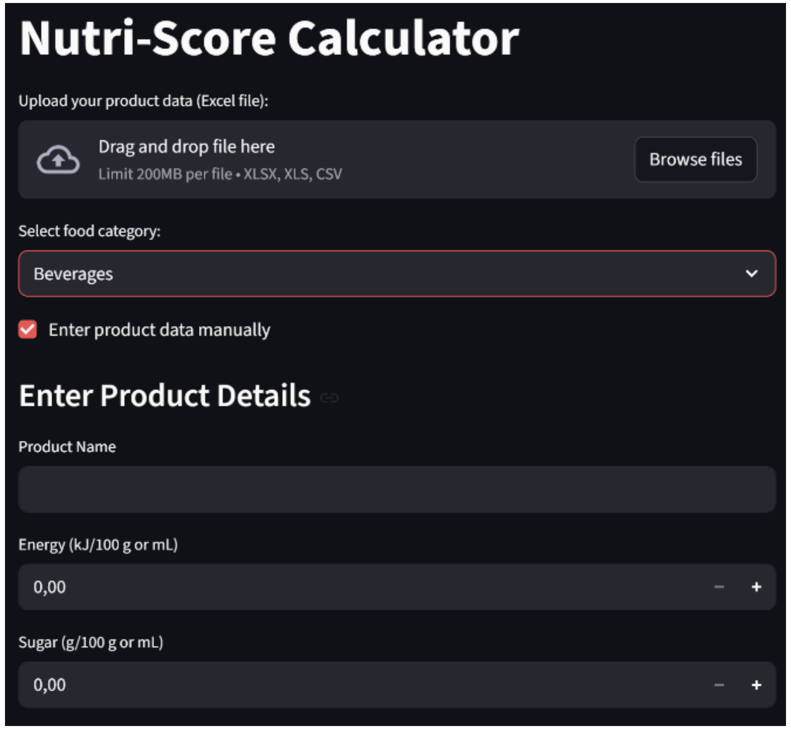
Biodiversity Lead at *BNP Paribas*

Sharon Bligh

Director of Health and Sustainability at *Consumer Goods Forum*

ATNI's Innovation: Company Self-Assessment





AI-enabled Nutrition Transformation Hub

- *Providing companies with self-assessment tools* to evaluate nutrition governance and benchmark performance using ATNi methodologies
- Offering dynamic dashboards and scenario modelling, such assessing the impact of 5% portfolio reformulation

NPM Calculator (starting with Nutri-Score)

- Enables companies to self-assess product categories and portfolio healthiness using nutrient profiling models.
- A basis for the development of calculator based on a variety of NPMs.

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