ATNi
NUTRITION
MARKETS
IMPACT

# ATNI RETAIL ASSESSMENT 2025-2026

FEBRUARY 4, 2026

# ATNi (Access to Nutrition initiative)

*Transforming markets to deliver Sustainable nutrition*

## Research and Tools

### F&B manufacturers

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

### Retailers

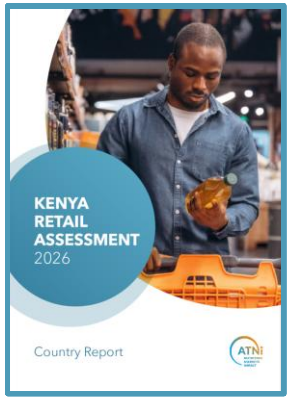
Assessing 12 largest retailers in the UK, on commitments and performance



ATNi's first multi-country Retail Assessment








19-02-2026

South Africa

24-02-2026

# Research aim and scope

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**<br>• US<br>• France | Walmart<br>Food Lion<br>Kroger | E.Leclerc<br>Intermarché<br>Carrefour |
| **Upper-middle income**<br>• South Africa<br>• Indonesia | Shoprite<br>SPAR<br>Pick n Pay | Alfamart<br>Super Indo<br>Indomaret |
| **Lower-middle Income**<br>• The Philippines<br>• Kenya | Puregold<br>Robinsons Supermarket<br>SM | Naivas saves you money<br>Carrefour<br>Quickmart Fresh & Easy |

# Research Components

### 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
- Marketing analysis

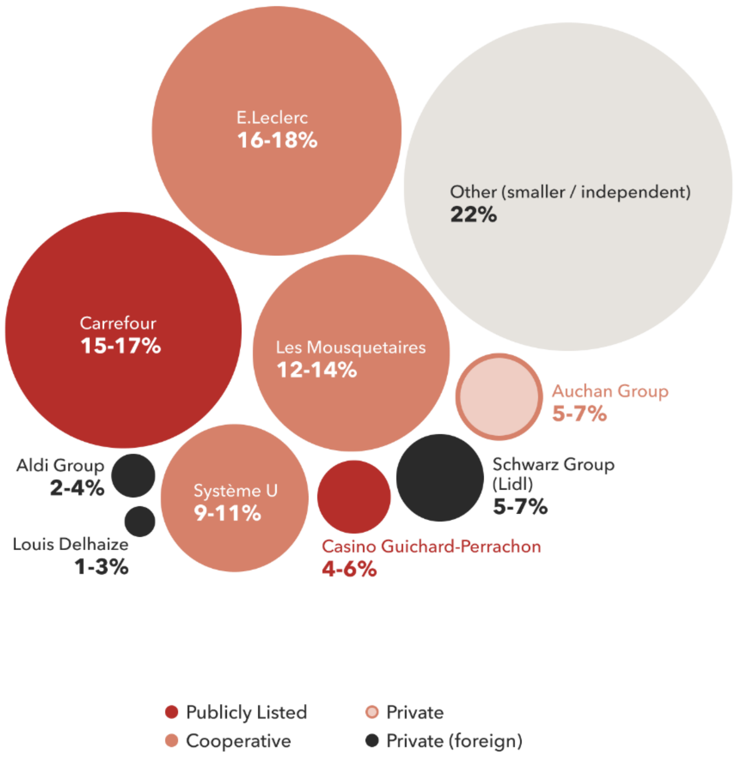
### 3) Pricing and Affordability

Compare the affordability of healthier vs. less healthy products, in relation to income levels, purchasing power parity, 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.

# France's retail food environment: High reach with rising nutrition challenges




*Major grocery retailers in France by market share and ownership type (EMI data, 2024)*

## France today: a strong baseline

- **Obesity remains a public health concern:**
  ± 1 in 10 adults living with obesity (9.7%), compared with 15.8% across Western Europe
- **Strong food culture and (voluntary) policy framework:**
  National programmes (PNAN, PNNS, PNNA); voluntary front-of-pack labeling (Nutri-Score); taxes on sugar-sweetened beverages (SSBs)

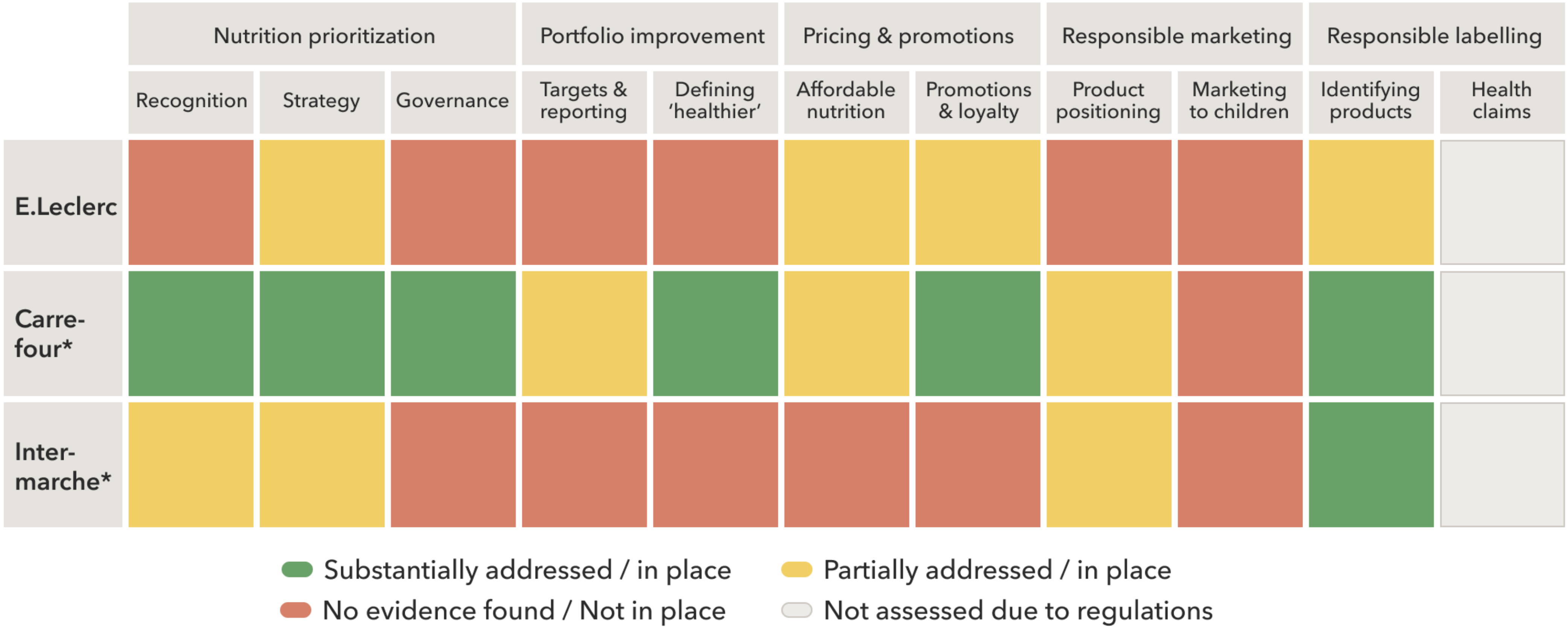
## What is shifting?

- **Ultra-processed foods (UPFs) rising despite good diets:**
  UPFs: ± 36% of total energy intake (NutriNet-Santé); UPF sales (EMI), ↑ ± 20% from 2017 to 2023
- **Changing retail market dynamics** with consolidation and price pressure:
  Top 3 retailers ≈ half the market; discounters growing

## Why retail strategy matters now?

- Governance models matter: Cooperative vs corporate = different **levers for nutrition action**
- **Private label** as a critical lever: ± 38% of grocery sales, and growing
- **Pricing and promotions** remain influential, even in a regulated context as gaps remain

# Nutrition prioritization across French retailers




*Provided feedback on Retailer Profile 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**

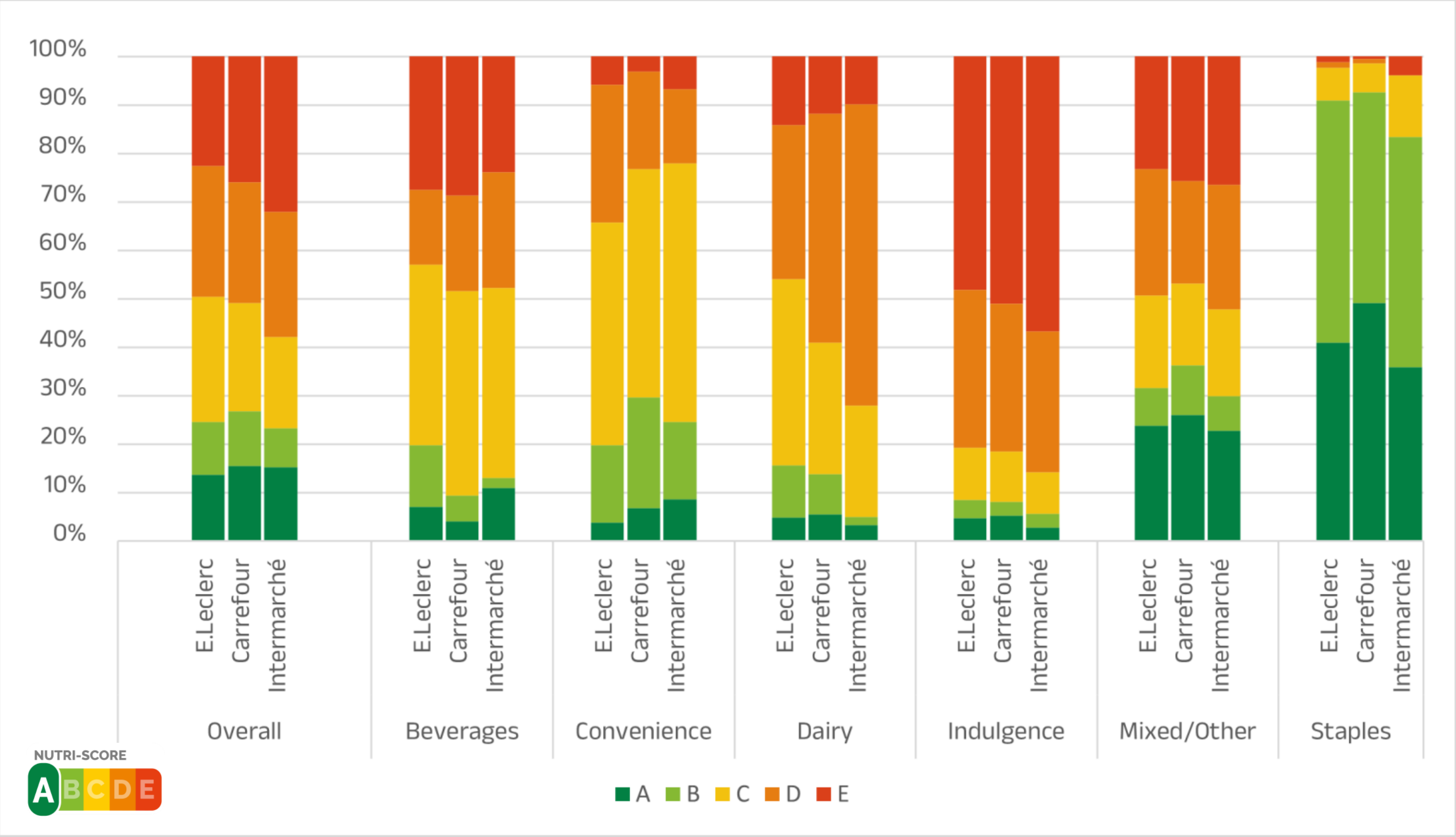
**Nutrient Profiling**

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)

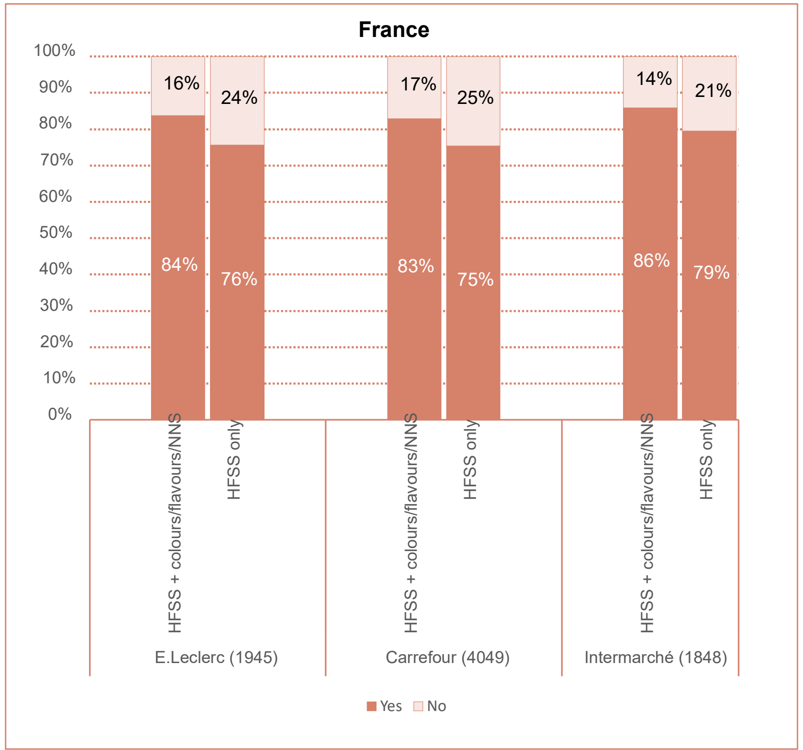
To highlight opportunities for portfolio improvement and responsible marketing

# 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

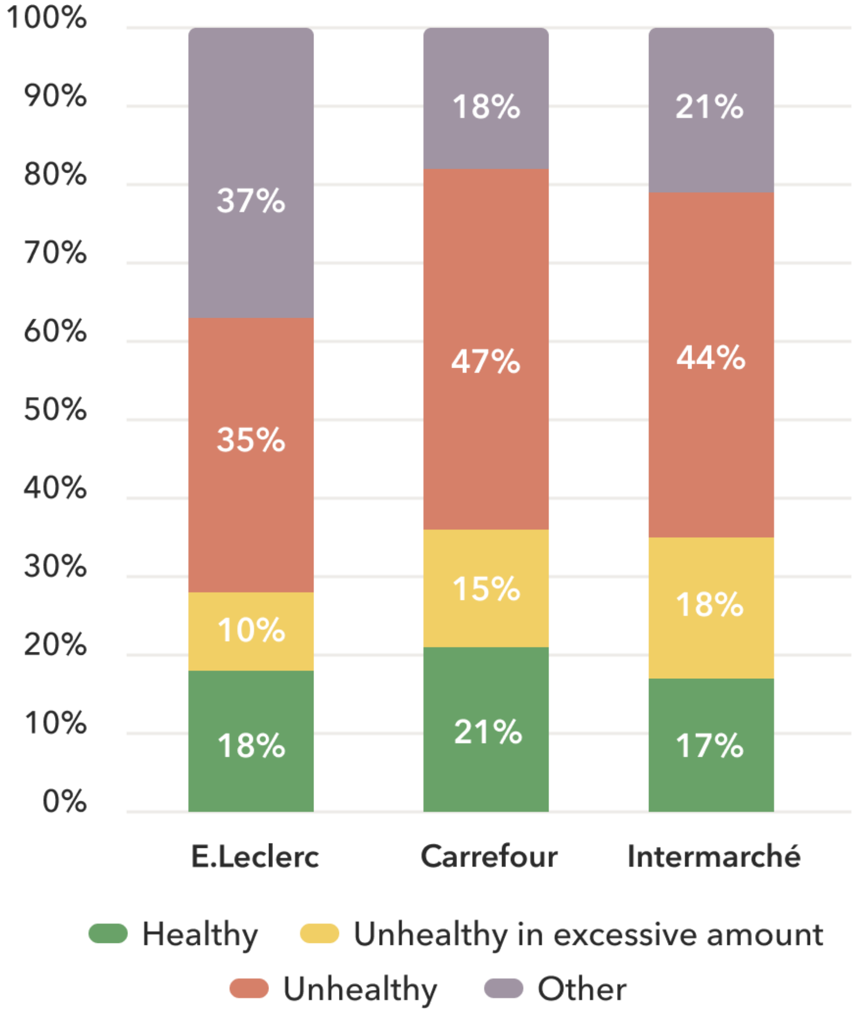



Over **84%** are HFSS and/or contain artificial additives: colors, flavors, and/or sweeteners—markers of ultra-processed foods



# Promotion analysis

PERCENTAGE OF FOOD PRODUCTS




* Values are rounded to the nearest point

**Promotion analysis assessed 1,204 food products** from biweekly retailer flyers over a 3-week period, using the Global Diet Quality Score framework to classify promoted foods:

- **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 items excluded from the assessment, such as alcohol
- **Overall imbalance:** Unhealthy products consistently receive greater promotional visibility than healthier options



# 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) **SSB Tax:** 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