

The KANTAR logo is positioned at the top center of the page. The background is a vibrant collage of torn paper in various colors (purple, blue, yellow, orange, pink) and patterns (grid, polka dots, stripes). A large blue circle is the central focus, containing the main text. To the left, a green circle contains the words 'possibility' and 'PRESSURE'. In the bottom right corner, a woman is laughing joyfully. The overall aesthetic is modern, energetic, and celebratory.

possibility
PRESSURE

PROGRESS

Brand growth in Africa comes from the progress you build, not the promises you make.

THE NEW RULES
OF GROWTH
IN AFRICA

Kantar Sustainable Transformation Practice

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BEFORE WE BEGIN



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There's a moment most brand leaders recognise, even if it rarely gets said out loud. Someone says *sustainability strategy* in a boardroom, and the room quietly braces itself. Not because no one cares. But because it feels moral rather than commercial. Because it sounds like cost, not growth. And because when markets are complex and pressure is high, it seems impossible to translate into action that actually moves the business forward.

We know this moment. We've sat in enough of these rooms, across enough African markets, over enough years, to recognise it the second it arrives.

This whitepaper is our answer to it.

We're proposing a different way to have this conversation.

Not another framework for doing good. But a sharper lens for finding growth, built from what we've seen work when brands operate under real pressure, in markets where affordability is non-negotiable, where community is the operating system, and where progress isn't an aspiration but a daily requirement.

It starts with **pressure**. Across Africa, economic strain, access barriers, climate shocks and inequality shape everyday decisions. We don't look away from this. We start here, because credibility needs it.

But pressure is not the end of the story. Where pressure exists, so does **possibility**: agency, resilience, aspiration, and a genuine desire to move forward. This is where brands earn the right to act.

Progress is where that possibility becomes real. Affordable, practical, visible change that reduces friction in people's lives. This is where sustainability stops being abstract and starts being useful.

And here is what the old conversation often missed: when progress is done well, **profit** follows. It is the outcome – the proof that the model works.

When it works, people feel it. Pressures ease. Lives improve. Systems get better. And the **planet** benefits not because it was the starting point, but because solutions that work for **people** at scale are solutions that last.

This is the signal we've been picking up across markets, across years. It's time to follow it.

Through Kantar's strategic intelligence, we help brand leaders move from pressure to profit – with the signals, evidence and strategic clarity to act quickly and confidently. More actionable than ESG. More grounded than purpose. And built to tell you not just what consumers think, but what will make them choose you.

Consider this your invitation in.

THERE IS A 60-POINT GAP

between what people want to do and what they're actually able to do in real life.

This is where your brand's next growth chapter is hiding



93%

want to live sustainably

POSSIBILITY



37%

are actively changing their behaviour

Source: Kantar Sustainability Sector Index 2026 – Nigeria, Kenya and South Africa data combined (3,002 respondents)
Gap 57% rounded up to 60

PROGRESS IS HOW BRANDS GROW IN AFRICA

Executive summary

If your brand is in Africa, you are already operating in the **most demanding growth environment** in the world. Not the most difficult. The most instructive. Because the pressures that African consumers navigate daily – economic, environmental and social – are not unique to this continent. They are simply arriving here first.

This paper is about growth. Specifically, about the intelligence that separates brands that scale in Africa from those that stall.

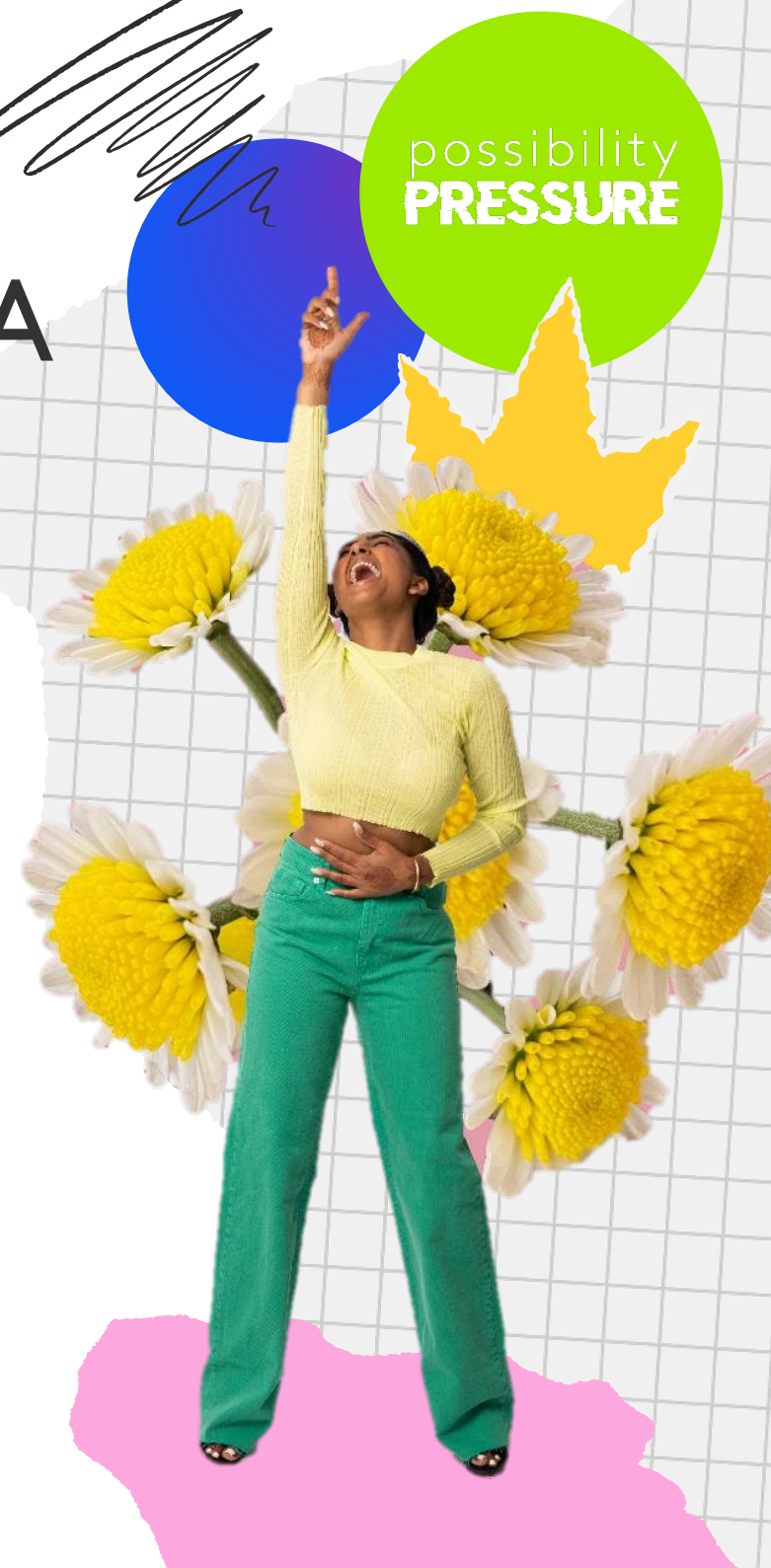
This paper shows why progress has become the most powerful growth strategy in Africa and why brands that fail to design for it will struggle to earn trust, adoption and long-term relevance.

Drawing on Kantar's strategic intelligence across Nigeria, Kenya and South Africa, it reveals:

- Why** the value-action gap is a design failure, not a consumer one
- How** affordability, trust and daily utility determine whether brands scale
- Why** every sector has a non-negotiable progress baseline, and a competitive space above it that most brands never reach
- How** brands that build progress unlock penetration, resilience and future demand

This is not a call for better intentions. It's a call for better growth strategy. Because in Africa, pressure is possibility.

And progress is how brands grow and futureproof.



THE PARADOX OF PROGRESS

Across the African continent,

pressure is part of daily life. People worry about energy access, food shortages, jobs, climate driven flooding, infrastructure failures, water scarcity, inequality and crime.

In

2026

consumers are standing at a crossroads between pressure and possibility. Pressure comes from the economic strain felt in all three major markets: Nigeria, Kenya and South Africa.

Fuel and food prices have risen sharply, and many people feel their household budgets tightening every month. Power outages and energy instability affect business operations and personal routines. Extreme weather events and infrastructure breakdowns create additional friction. At the same time, social tensions, high crime rates, domestic violence and political uncertainty contribute to a sense of threat that feels overwhelming.

Yet there is also possibility.

African consumers are resilient and pragmatic. They adapt, improvise and innovate daily, from how they manage energy access, to how they stretch household budgets, to how communities step in where systems fall short.

This paradox between pressure and possibility creates the perfect conditions for progress – for brands and for consumers. Brands can help people unlock progress in their lives. And progress for brands follows, through profit from resulting brand growth.

“In Africa, progress is not a purpose ambition. It is the operating system for growth at scale.”



THE REAL CONSUMER CONTEXT IN 2026

Concern about the pressures of everyday life remains remarkably high in Nigeria, Kenya and South Africa. In all three markets, over 85% of consumers believe action on social inequality and climate change starts with people like them. These numbers have not declined since 2025. People still care deeply about fairness, justice and environmental protection, even as they navigate widespread economic uncertainty.

What has changed is the emotional and cognitive bandwidth people have. The constant flow of crises creates issue fatigue. Many feel overwhelmed by the volume of problems demanding attention. Cognitive science explains why. Humans can only attend to a limited number of issues at one time. Prolonged exposure to the same problems creates avoidance. People do not stop caring, but they disengage from information that feels exhausting.



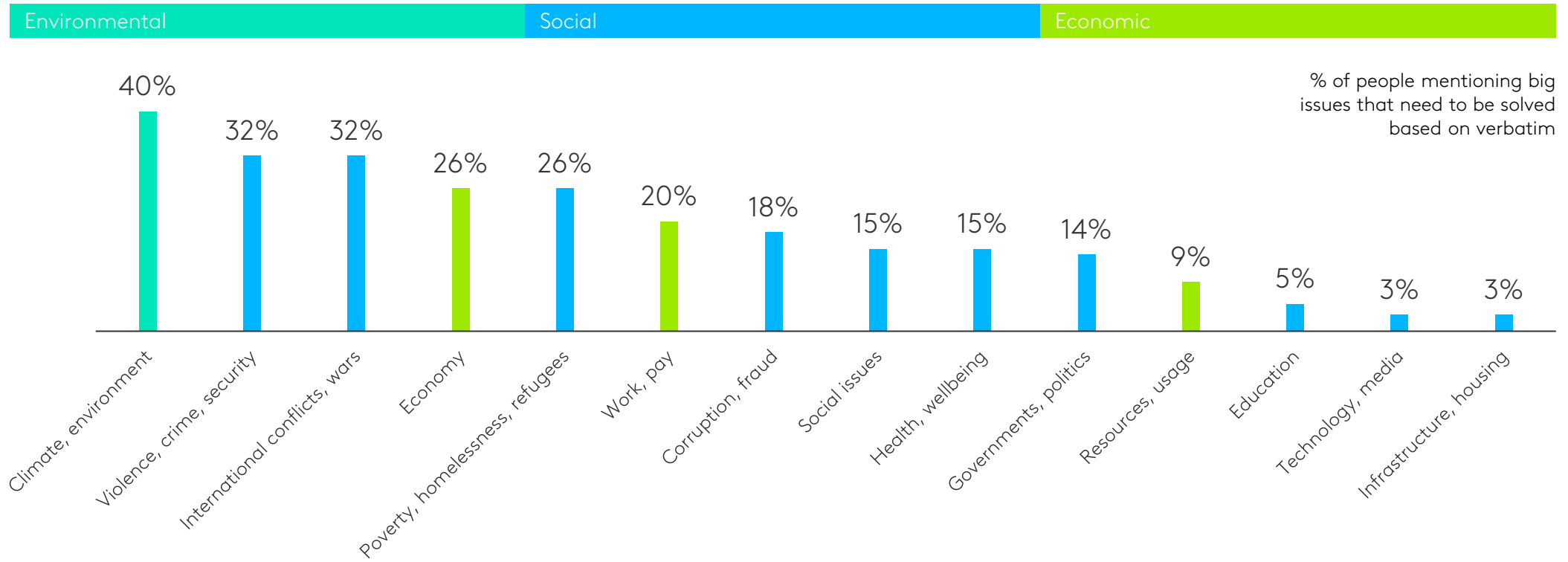
85%

of people want
solutions for
progress

“Consumers care deeply about society – but they’re overwhelmed and exhausted. In a world of overload, progress means reducing cognitive effort.”

PEOPLE ARE OVERWHELMED

Multiple crises are competing for attention



The media landscape reinforces the pressure. News coverage in 2025 across the top outlets in Nigeria, Kenya and South Africa focused on inflation, governance, crime, protests, service delivery failures and corruption.

Environmental issues often appeared indirectly as part of these topics, such as water shortages or energy failures. People see environmental pressures intertwined with everyday social and economic problems, not as a separate agenda.

For brands, this means that communication must connect to the issues people already care about. It should be framed with clarity, relevance and simplicity. And it must never assume attention. People need brands to remove cognitive effort, not add to it.

THE VALUE-ACTION GAP

What is driving it?



93%

of African consumers want to live sustainably.

37%

actually do.



A major theme in Africa's conversation about progress, is the widening value-action gap. Across Nigeria, Kenya and South Africa, 93% of consumers say they want to live sustainably, yet only 37% take consistent action. This is a sixty-point gap.

THE VALUE-ACTION GAP

There are three main reasons for this

First

Consumer exhaustion

People are navigating multiple pressures at once. Decision making becomes harder, and sustainability can feel like an optional extra unless its benefits are immediate and practical.

Second

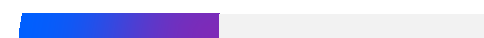
Limited innovation from brands and governments

Many consumers feel it is difficult to recognise which products or services are genuinely sustainable.



58%

say they struggle to tell what is good or bad for the environment.



42%

say they do not know where to find sustainable options.

These numbers have not improved since 2025.

Third

Affordability

This is the single biggest barrier in Africa.

80%

of consumers say they will only choose a sustainable product if it is affordable.

Not if it is worth the premium. Not if it is slightly more expensive. It must be truly affordable. If sustainable choices cost more, they exclude the majority of people who want to act.

These barriers are not signs of apathy. They are signs that brands must take responsibility for making sustainable choices simple, accessible and relevant.

In essence, people aren't failing sustainability. Sustainability has failed to become progress.

The value-action gap is actually a progress gap. Because affordability, trust, and clarity barriers will always kill good intentions.



**This completely shifts
the challenge from
persuasion to design.**

In reality, the sixty-point value-action gap is an opportunity for progress.

Consumers want solutions and they want inspiration for action. They're looking to brands to provide it. In this reality progress means products and services that are affordable, practical, visible and directly solve the pressures of daily life.

“People aren’t failing sustainability. Sustainability has failed to become progress. Progress is affordable, practical, visible and solves the pressures of daily life.”

BARRIERS TO ACTION

A deeper view

Delving deeper, each of the three reasons for the value-action gap has underlying dynamics shaping consumer behaviour.



1

Overwhelm and attention limits

People list environmental issues alongside violence, crime, economic hardship, health concerns and corruption as problems needing urgent solutions. Sustainability does not exist in a vacuum. When news cycles are dominated by social instability, sustainability messaging must work harder to stand out.

Cognitive limits explain why people struggle to engage deeply with multiple issues. Working memory can only process a small number of inputs. Issue fatigue sets in when topics are repeatedly covered without clear solutions. For brands, this means competing claims, long lists of benefits or complex scientific language will not land. What cuts through is simplicity and relevance.

BARRIERS TO ACTION

A deeper view

Delving deeper, each of the three reasons for the value-action gap has underlying dynamics shaping consumer behaviour.

2

Lack of trust and perceived inaction

Consumers believe both governments and brands carry significant responsibility to act. Yet few feel either is doing enough. Only around a quarter of consumers believe brands are taking meaningful action, a number that has fallen by a further 5% in South Africa since 2025. Trust is fragile. Greenwashing is widely perceived. Many worry that brands show up only for commercial gain, rather than to create shared value.

“Silence is not neutral. It’s interpreted negatively – half of consumers assume a silent brand is doing nothing or hiding something. Brands must communicate with proof rather than claims.”

In a world of hyper-cynicism, brands need to be precise about where and how they have a right to play to make sure they are seen to be authentic.

72% worry brands are involved just for commercial reasons.



BARRIERS TO ACTION

A deeper view

Delving deeper, each of the three reasons for the value-action gap has underlying dynamics shaping consumer behaviour.



3

Affordability and survival

In Africa, sustainability is not about values alone. It is about survival. When living costs rise, consumers prioritise price. They need sustainable options that deliver immediate utility. Brands that design from affordability unlock adoption. Those that add a green premium design for the one percent.

As a result, brands need to be very intentional about the sustainability issues they choose to champion and how they communicate if they want to be seen as authentic.

SECTOR DYNAMICS

Shields and swords

Sectors differ in the types of concerns consumers associate with them.

In Africa, waste, plastics, pollution and health related impacts dominate across sectors. These are tangible issues with visible effects that people relate to in daily life.

However, some sectors are held most accountable for certain concerns. For example, in Kenya, oil and gas, energy providers and cars are the sectors most associated with climate change. And sectors like alcoholic beverages, financial services and luxury products are the sectors most associated with poverty according to consumers.

Further, each sector faces a unique set of issues in people's minds. Tyres are associated with air pollution and waste. Dairy is associated with overpackaging and animal welfare issues. AI tools are associated with job insecurity and mental health concerns.

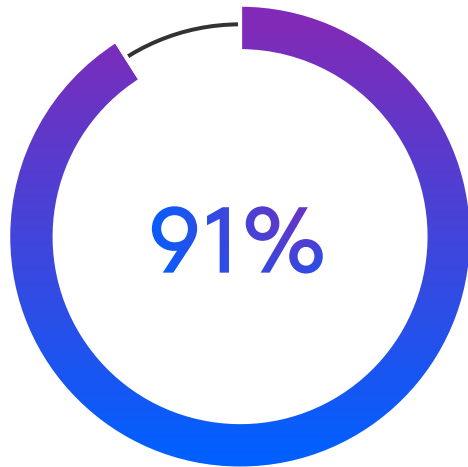
As such, sectors have native progress expectations. To build credibility, brands must begin with shields:

The issues people already link to the sector. These are baseline progress expectations. Brands must show progress here before attempting to lead conversations on broader or more aspirational sustainability themes.

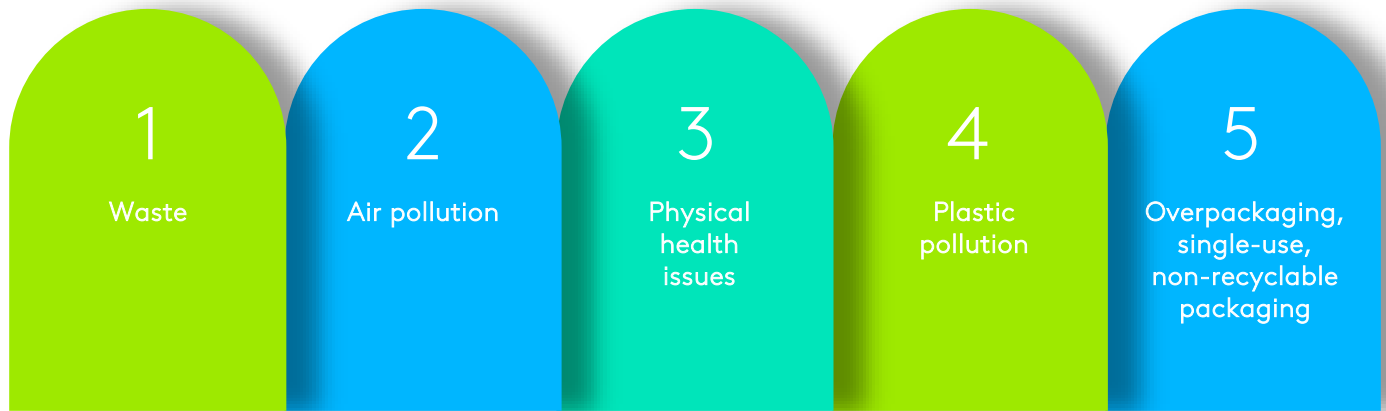
Once shields are addressed, brands can activate swords:

Differentiating spaces where the brand can lead and leapfrog competitors. The sword territory varies by sector. It may relate to community empowerment, circularity innovation, affordability solutions or something else. But the sequence always matters. Without progress on shields, swords are dismissed as inauthentic.

And in Africa, inauthenticity doesn't just stall growth; it erodes trust faster than silence.



of people in Africa attribute at least one issue to a sector. On average six issues are given.



“You cannot lead progress if you haven’t earned trust in your sector-native progress expectations. You need to turn your sector issues into progress mandates.”

SECTOR DYNAMICS

Pressure and progress

It is also important to consider where consumers see your sector in comparison with others they interact with. Here, we have two lenses to guide your focus:

First, the **Consumer Sustainability Pressure Index** which tells us which sectors' sustainability concerns are most widespread, most varied, and most intense from a consumer point of view.

Second, the **Sustainability Sector Index** which reflects how credible and progressive a sector is perceived to be. Together, they tell you how hard you need to work and where to build from.

How much consumer **pressure** is your sector under?

REACH OF CONCERN

BREADTH OF ISSUES

SEVERITY



CONSUMER SUSTAINABILITY PRESSURE INDEX

How **progressive** is your sector perceived to be?



STRATEGY



INNOVATION



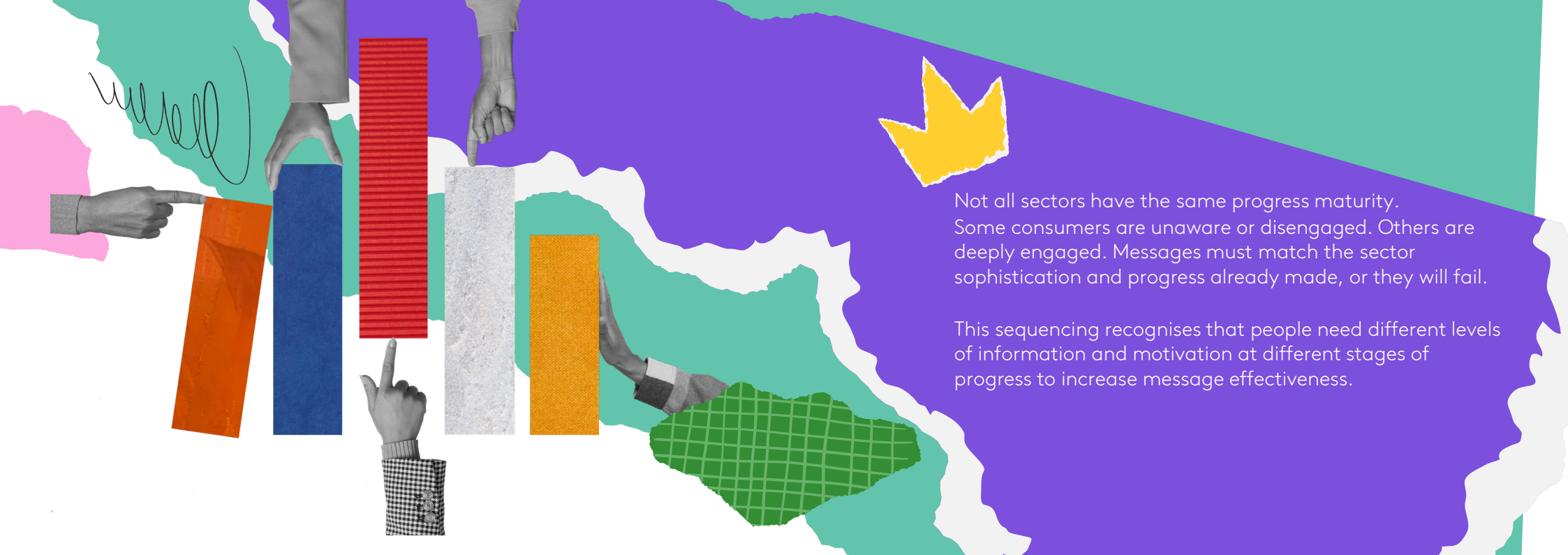
ACTIVATION



IMPACT



SUSTAINABILITY SECTOR INDEX



Not all sectors have the same progress maturity. Some consumers are unaware or disengaged. Others are deeply engaged. Messages must match the sector sophistication and progress already made, or they will fail.

This sequencing recognises that people need different levels of information and motivation at different stages of progress to increase message effectiveness.

PROGRESS MATURITY

Meeting people where they are

Are people unaware or disengaged?

In this case, the most effective approach is to make progress unskippable with one striking reframe that makes an abstract issue feel real and personal.

Are people problem engaged but don't know what to do about it?

Then show the solution towards progress and one simple way in. Reduce anxiety by presenting a doable, single first step – visualise how to start.

Are people solution engaged?

They want to act and know that solutions exist but don't know why they should choose certain products over others. In this case differentiate the how (not just the what), prove that your solution is better and show how you achieve progress.

Are people brand engaged?

People already have a go-to set of brands. In this case prove you go further to build progress through uniqueness and multi-layered benefits.

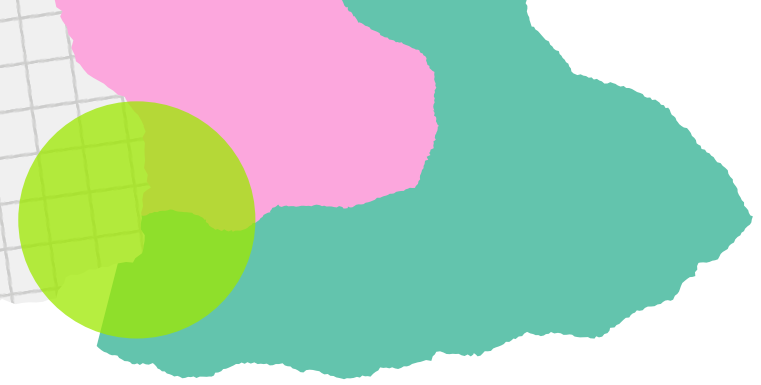
Are people behaviour engaged?

Here people are sophisticated buyers and users, so you have to build belonging, identity and rituals to keep habits and progress alive.

“Progress is a journey.
Your messaging has to be too.”

PROGRESS

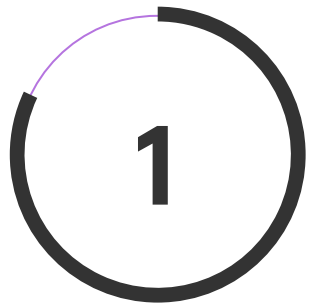
The African operating system for brand growth



What works here under pressure is what will work elsewhere under disruption.

To create progress, for people and brands, we're proposing a practical operating system based on five principles identified across African markets and validated by successful African brands. But before discussing each principle in turn, we need to start with three critical foundational truths.

Keeping these three truths in mind, we can turn our attention to the five African principles of progress for brand growth.



82%

believe businesses must make society more fair



2



73%

believe sustainable = expensive

UBUNTU: "I AM BECAUSE WE ARE"

Africans view sustainability and progress through a community lens, not individual carbon footprints.

SOCIAL + ENVIRONMENTAL PRESSURES ARE INSEPARABLE

Climate matters because it threatens food security. Water pollution matters because it affects health.

AFFORDABILITY IS NON-NEGOTIABLE

Affordability is not a nice-to-have, it's a must-have. Sustainable brands can't be premium even if they're 'worth it'.

THE 5 AFRICAN SIGNALS

of progress for brand growth

1

AUTHENTIC PROGRESS

Proof before poetry

African consumers quickly detect superficial messaging. Brands must lead with action. Proof of progress should be close to the consumer experience. Words must match behaviour. Authenticity is not about perfection. It is about consistency, transparency and humility.

2

CO-CREATED PROGRESS

Progress built with communities

Brands succeed when they work with communities and share decision making. Local expertise ensures relevance and builds trust. Examples include cooperatives, local advisory groups and participatory product design.

3

INTEGRATED PROGRESS

Social + environmental, never split

In Africa, social and environmental issues are inseparable for progress. Climate matters because it affects food, health and livelihoods. Water issues matter because they disrupt agriculture, crucial services and everyday life. Brands must frame environmental action through social relevance.

4

AFFORDABLE PROGRESS

Progress that everyone can access

Affordability is non-negotiable for progress. Brands must redesign offerings with cost in mind. This may require simplifying product lines, adopting low-cost distribution models, or rethinking pack sizes.

5

YOUTH POWERED PROGRESS

The continent's advantage

Africa's median age is nineteen. Youth are not a segment. They are the mainstream. They adopt faster, influence communities and shape future markets. They are change makers. Brands that invest in youth skills, entrepreneurship and inclusion benefit from long term loyalty.

“Affordability is non-negotiable. In Africa it is the gateway to adoption. We need affordability-first design from the start.”

PROGRESS MAKERS

Brand lessons from the markets

Are there brands in Africa that get it right? Yes, here we showcase five examples of brands which are operating under the African progress principles for brand growth.

1

HERCONOMY, NIGERIA

Progress in women's financial freedom

A fintech platform created Breastmilk Money, a savings product for nursing mothers that turns formula savings into interest bearing deposits. The interest rate reflects the scientific benefit of breastfeeding. The product empowers women financially and supports child health. It was developed with Nigerian women, not applied to them.

2

ALAFFIA, TOGO

Progress through co-creation and shared value

Built on women-led cooperatives and traditional knowledge, Alaffia integrates community welfare into its business model. Social initiatives such as tree planting, maternal care and education are owned by communities, ensuring solutions last.

3

BEYOND THE GRID FUND, 6 SUB-SAHARAN COUNTRIES

Social progress through essential services as environmental strategy

By focusing on powering clinics, schools and small businesses, the fund built a social case for clean energy. Environmental wins followed, supported by job creation and local skills.

4

CAPITEC BANK, SOUTH AFRICA

Progress through affordability

Capitec Bank simplified banking and reduced fees. It serves millions because it was built for people excluded by complexity and cost. Its model shows how affordability creates scale and how scale creates inclusion.

5

MICROSOFT, SOUTH AFRICA

Progress through youth skills

By training one million people in AI skills, Microsoft positions itself not just as a technology provider but as a facilitator of possibility and progress. It creates a skilled workforce while building relevance with young consumers.

“If it’s not improving real life, it isn’t progress. And it won’t deliver long-term growth for your brand.”



YOUR CALL TO ACTION

Africa is the fastest growing consumer market in the world. By 2050, Africa will be home to 2.5 billion people – one quarter of the world's population. Africa is the future demand engine of the world.

Sustainable choices can transform categories and create progress for people and brands – if brands remove friction, design for affordability and connect to daily reality. By embracing the progress principles for brand growth, brands can close the value-action gap and unlock shared value. In Africa, the overall projected consumer spend by 2050 is \$5 trillion. Even a 10% boost in adoption of sustainable products across Africa's

consumer markets would represent hundreds of billions of dollars in redirected and incremental spend. The brands that act now to build progress will shape how entire categories approach brand growth for decades. The possibility is a complete market transformation. Brands that fail to build progress into people's lives will not scale, will not be trusted, and will not endure. Progress is no longer a conversation topic. It is the operating

system for growth in Africa. So, the question is no longer 'should we do this?' It is 'how fast can we redesign our brand for progress?' If you are ready to move from aspiration to action, Kantar's Sustainable Transformation Practice provides the strategic intelligence, progress signals and tools to build growth that works, here and now, and for what comes next.

Africa...

The possibility:

2.5 billion

people
by 2050 *

\$5 trillion

Overall projected
consumer spend
by 2050 **

YOUR BRAND HAS A PROGRESS GAP. MOST DO.

So the question isn't whether the gap exists – it's whether you know what possibilities are hidden in it. And if you're moving fast enough to close it?

Across Africa, pressure is reshaping expectations, behaviours and choice. It's creating new possibilities for growth, but also new risks to relevance. The brands that will win are those that can read the signals clearly and act on them confidently.

Our teams work with brand leaders in Africa who are ready to stop describing the problem and start designing their future.

Using strategic intelligence, we help you identify the pressures shaping your sector, map your shields and swords, benchmark your progress and credibility, pinpoint where action will unlock adoption, trust and growth – and build the case for

investment that connects social and environmental sustainability to profit.

Because in Africa, pressure isn't the obstacle to growth. It's the blueprint for it.

We're proposing a different way to have this conversation.

Start with the signal. Use the progress checklist on the next page to see where your brand stands, where your gaps are, and where to focus next.

Then let's talk. This is the conversation we're having with senior marketing, brand and sustainability leaders across Africa right now, and your next growth chapter will depend on being part of it.

Strategic intelligence by Kantar. Because in Africa, pressure isn't the obstacle to growth. It's the blueprint for it.

in Astrid Ricketts | Sustainable Transformation Practice Lead, MEA&T, Kantar

in Ndeye Diagne | Chief Strategy & Transformation Officer, MEA&T, Kantar

CHECK YOUR PROGRESS

How are you doing?

Your brand strategy and activation will be most successful when it harnesses the African progress principles for brand growth.

You don't have to leverage all five, but the ones you choose have to be communicated consistently. We can help.

1

AUTHENTIC PROGRESS

Proof before poetry

Are you showing genuine action to consumers?

Yes, we're good

No, not really

2

CO-CREATED PROGRESS

Progress built with communities

Are you harnessing the opinions and expertise of communities?

Yes, we're good

No, not really

3

INTEGRATED PROGRESS

Social + environmental, never split

Are you framing environmental issues as social progress?

Yes, we're good

No, not really

4

AFFORDABLE PROGRESS

Progress that everyone can access

Are you integrating affordability into product design?

Yes, we're good

No, not really

5

YOUTH POWERED PROGRESS

The continent's advantage

Are you leveraging youth as change agents?

Yes, we're good

No, not really

If you answered 'no' to one or more questions, we're here to help.

SOLUTIONS

How Kantar can help

Sustainable Transformation Practice

Our practice works with brands to identify sector-native priorities, apply the progress principles and design scalable behaviour change into products and services. We turn data into activation plans and help you build internal capability.

Sustainability Sector Index 2026

The Sustainability Sector Index (SSI) provides country and sector level intelligence for Nigeria, Kenya and South Africa and other markets around the world. It identifies pressure levels, perceived progress, greenwashing risks, consumer sophistication and adoption barriers. With workshops and decision tools, the SSI helps you choose shield topics, define sword opportunities and craft messages that work.

BrandSustainability

Once you understand your market and sector, BrandSustainability helps you define the strategy and activation – specifically for your brand. It's not easy to differentiate from competitors and to speak to consumers in an authentic way that makes them choose you. BrandSustainability is designed to make you meaningfully different, so you can build progress, grow brand equity and boost commercial success.



INTELLIGENCE FOR BRAND GROWTH

Kantar's perspective

Sustainability has moved irreversibly into the C-suite. At the same time, increased transparency, regulation and AI-enabled decision environments are reshaping how brands are researched, compared and chosen.

Sustainability signals are now more visible, more comparable and more consequential, making sustainability one of the fastest-moving sources of both risk and opportunity for brands. Leaders need clarity to make confident decisions.

Our strategic intelligence approach

Our approach goes beyond diagnosing sustainability perceptions. It is designed to support decision-making, prioritisation and action, grounded in Kantar's Blueprint for Brand Growth and our proven understanding of how brands create value.

By linking sustainability to Kantar's Meaningful, Different and Salient framework, we deliver an equity-led approach to sustainability intelligence, validated against commercial outcomes. As AI increasingly influences brand discovery and recommendation, our intelligence ensures sustainability signals are credible and trusted by the systems shaping brand choice.

Proven at scale

Our strategic intelligence is built on industry-leading scale and continuity of evidence.

