



Alcoholic Drinks in Kenya

June 2024

Table of Contents

EXECUTIVE SUMMARY

Alcoholic drinks in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

On-trade vs off-trade split

What next for alcoholic drinks?

MARKET BACKGROUND

Legislation

Legal purchasing age and legal drinking age

Drink driving.

Advertising

Smoking ban

Opening hours

On-trade establishments

TAXATION AND DUTY LEVIES

Summary 1 - Taxation and Duty Levies on Alcoholic Drinks 2023

OPERATING ENVIRONMENT

Contraband/parallel trade

Duty free

Cross-border/private imports

KEY NEW PRODUCT LAUNCHES

Kenya Breweries launches 'Tusker Ndimu' and 'Pilsner Mfalme'.

Bila Shaka enters craft beer market with the launch of Capitan Lager

KBL Launches a New Smirnoff Variant 'Pineapple Punch'

KWAL rebrands Kibao Vodka as it targets a new generation of customers

Outlook

MARKET INDICATORS

Table 1 - Retail Consumer Expenditure on Alcoholic Drinks 2018-2023

MARKET DATA

Table 2 - Sales of Alcoholic Drinks by Category: Total Volume 2018-2023

Table 3 - Sales of Alcoholic Drinks by Category: Total Value 2018-2023

Table 4 - Sales of Alcoholic Drinks by Category: % Total Volume Growth 2018-2023

Table 5 - Sales of Alcoholic Drinks by Category: % Total Value Growth 2018-2023

Table 6 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2023

Table 7 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2023

Table 8 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2023

Table 9 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2023

Table 10 - GBO Company Shares of Alcoholic Drinks: % Total Volume 2019-2023

Table 11 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2018-2023

Table 12 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2023

Table 13 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2023-2028

Table 14 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2023-2028

Table 15 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2023-2028

Table 16 - Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 2 - Research Sources

[Beer in Kenya](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Shift to cheaper alternatives as consumers face budgetary pressures

Major players push into craft beers to meet growing demand

Flavoured beers tap into needs of young adults

PROSPECTS AND OPPORTUNITIES

Lower demand for canned beers due to affordability challenges

Urbanisation and changing lifestyles to boost future growth

Consumer focus on health will spur new product developments

CATEGORY BACKGROUND

Lager price band methodology

Summary 3 - Lager by Price Band 2023

Table 17 - Number of Breweries 2018-2023

CATEGORY DATA

Table 18 - Sales of Beer by Category: Total Volume 2018-2023

Table 19 - Sales of Beer by Category: Total Value 2018-2023

Table 20 - Sales of Beer by Category: % Total Volume Growth 2018-2023

Table 21 - Sales of Beer by Category: % Total Value Growth 2018-2023

Table 22 - Sales of Beer by Off-trade vs On-trade: Volume 2018-2023

Table 23 - Sales of Beer by Off-trade vs On-trade: Value 2018-2023

Table 24 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2018-2023

Table 25 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2018-2023

Table 26 - GBO Company Shares of Beer: % Total Volume 2019-2023

Table 27 - NBO Company Shares of Beer: % Total Volume 2019-2023

Table 28 - LBN Brand Shares of Beer: % Total Volume 2019-2023

Table 29 - Forecast Sales of Beer by Category: Total Volume 2023-2028

Table 30 - Forecast Sales of Beer by Category: Total Value 2023-2028

Table 31 - Forecast Sales of Beer by Category: % Total Volume Growth 2023-2028

Table 32 - Forecast Sales of Beer by Category: % Total Value Growth 2023-2028

[Cider/Perry in Kenya](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Female and younger adult population drives growth

Health-conscious consumers to provide sales boost

Brands target consumers through brand ambassadors

PROSPECTS AND OPPORTUNITIES

Kenya's rapidly growing food and beverage industry to boost sales of cider/perry

Innovations using local flavours set to appeal to consumers

Kenya Originals cider faces challenges over toxicity claims

CATEGORY DATA

- Table 33 - Sales of Cider/Perry: Total Volume 2018-2023
- Table 34 - Sales of Cider/Perry: Total Value 2018-2023
- Table 35 - Sales of Cider/Perry: % Total Volume Growth 2018-2023
- Table 36 - Sales of Cider/Perry: % Total Value Growth 2018-2023
- Table 37 - Sales of Cider/Perry: Total Volume 2019-2023
- Table 38 - Sales of Cider/Perry: Total Value 2019-2023
- Table 39 - Sales of Cider/Perry by Off-trade vs On-trade: Volume 2018-2023
- Table 40 - Sales of Cider/Perry by Off-trade vs On-trade: Value 2018-2023
- Table 41 - Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2018-2023
- Table 42 - Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2018-2023
- Table 43 - Sales of Cider/Perry by Off-trade vs On-trade: Volume 2019-2023
- Table 44 - Sales of Cider/Perry by Off-trade vs On-trade: Value 2019-2023
- Table 45 - GBO Company Shares of Cider/Perry: % Total Volume 2019-2023
- Table 46 - NBO Company Shares of Cider/Perry: % Total Volume 2019-2023
- Table 47 - LBN Brand Shares of Cider/Perry: % Total Volume 2019-2023
- Table 48 - Forecast Sales of Cider/Perry: Total Volume 2023-2028
- Table 49 - Forecast Sales of Cider/Perry: Total Value 2023-2028
- Table 50 - Forecast Sales of Cider/Perry: % Total Volume Growth 2023-2028
- Table 51 - Forecast Sales of Cider/Perry: % Total Value Growth 2023-2028

Rtds in Kenya

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Rising preference for RTDs among young adults
- Spirit-based RTDs gain popularity among women
- Supermarkets, small retailers and e-commerce are key channels for RTDs

PROSPECTS AND OPPORTUNITIES

- Category to weather the effects of inflation in the forecast period
- Consumers drive demand for lower-calorie and functional beverages due to health awareness
- Rising disposable incomes to drive growth of RTDs

CATEGORY DATA

- Table 52 - Sales of RTDs by Category: Total Volume 2018-2023
- Table 53 - Sales of RTDs by Category: Total Value 2018-2023
- Table 54 - Sales of RTDs by Category: % Total Volume Growth 2018-2023
- Table 55 - Sales of RTDs by Category: % Total Value Growth 2018-2023
- Table 56 - Sales of RTDs by Off-trade vs On-trade: Volume 2018-2023
- Table 57 - Sales of RTDs by Off-trade vs On-trade: Value 2018-2023
- Table 58 - Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2018-2023
- Table 59 - Sales of RTDs by Off-trade vs On-trade: % Value Growth 2018-2023
- Table 60 - GBO Company Shares of RTDs: % Total Volume 2019-2023
- Table 61 - NBO Company Shares of RTDs: % Total Volume 2019-2023
- Table 62 - LBN Brand Shares of RTDs: % Total Volume 2019-2023
- Table 63 - Forecast Sales of RTDs by Category: Total Volume 2023-2028
- Table 64 - Forecast Sales of RTDs by Category: Total Value 2023-2028
- Table 65 - Forecast Sales of RTDs by Category: % Total Volume Growth 2023-2028
- Table 66 - Forecast Sales of RTDs by Category: % Total Value Growth 2023-2028

Spirits in Kenya

KEY DATA FINDINGS

2023 DEVELOPMENTS

Spirits grows by targeting younger adult generations

Kenya Wine Agencies launch new Smirnoff variant 'Pineapple Punch'

Brands leverage celebrities and social media influencers to connect with younger generations

PROSPECTS AND OPPORTUNITIES

High prices to push consumers towards cheaper/ counterfeit brands

Women poised to drive category with strong preference for gin

Increasing demand for premium alcohol due to lower spending power

CATEGORY DATA

Table 67 - Sales of Spirits by Category: Total Volume 2018-2023

Table 68 - Sales of Spirits by Category: Total Value 2018-2023

Table 69 - Sales of Spirits by Category: % Total Volume Growth 2018-2023

Table 70 - Sales of Spirits by Category: % Total Value Growth 2018-2023

Table 71 - Sales of Spirits by Off-trade vs On-trade: Volume 2018-2023

Table 72 - Sales of Spirits by Off-trade vs On-trade: Value 2018-2023

Table 73 - Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2018-2023

Table 74 - Sales of Spirits by Off-trade vs On-trade: % Value Growth 2018-2023

Table 75 - GBO Company Shares of Spirits: % Total Volume 2019-2023

Table 76 - NBO Company Shares of Spirits: % Total Volume 2019-2023

Table 77 - LBN Brand Shares of Spirits: % Total Volume 2019-2023

Table 78 - Forecast Sales of Spirits by Category: Total Volume 2023-2028

Table 79 - Forecast Sales of Spirits by Category: Total Value 2023-2028

Table 80 - Forecast Sales of Spirits by Category: % Total Volume Growth 2023-2028

Table 81 - Forecast Sales of Spirits by Category: % Total Value Growth 2023-2028

Wine in Kenya

KEY DATA FINDINGS

2023 DEVELOPMENTS

Italian producers target Kenya's emerging taste for wine

French wine producers pinpoint Kenya's burgeoning wine category

Local producers face stiff competition amid rising demand for wine

PROSPECTS AND OPPORTUNITIES

Improving lifestyles continue to drive sales growth in wine

Heavy taxation to push up prices

On-trade expansion to foster wine appreciation and knowledge

CATEGORY DATA

Table 82 - Sales of Wine by Category: Total Volume 2018-2023

Table 83 - Sales of Wine by Category: Total Value 2018-2023

Table 84 - Sales of Wine by Category: % Total Volume Growth 2018-2023

Table 85 - Sales of Wine by Category: % Total Value Growth 2018-2023

Table 86 - Sales of Wine by Off-trade vs On-trade: Volume 2018-2023

Table 87 - Sales of Wine by Off-trade vs On-trade: Value 2018-2023

Table 88 - Sales of Wine by Off-trade vs On-trade: % Volume Growth 2018-2023

Table 89 - Sales of Wine by Off-trade vs On-trade: % Value Growth 2018-2023

Table 90 - Forecast Sales of Wine by Category: Total Volume 2023-2028

Table 91 - Forecast Sales of Wine by Category: Total Value 2023-2028

Table 92 - Forecast Sales of Wine by Category: % Total Volume Growth 2023-2028

Table 93 - Forecast Sales of Wine by Category: % Total Value Growth 2023-2028

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/alcoholic-drinks-in-kenya/report.