

Alcoholic Drinks in Kenya

Market Direction | 2022-07-28 | 56 pages | Euromonitor

AVAILABLE LICENSES:

- Single User Licence €1750.00
- Multiple User License (1 Site) €3500.00
- Multiple User License (Global) €5250.00

Report description:

The alcoholic drinks category in Kenya made a strong recovery in retail volume sales in 2021, although overall consumption remained below pre-pandemic levels. The on-trade witnessed the strongest growth as establishments reopened after COVID-19 restrictions were eased. Consumer demand also rebounded in the off-trade following a small dip in 2020, buoyed by the return of consumer confidence as incomes improved. Kenyans have supported local manufacturers since the pandemic, opting for local brands...

Euromonitor International's Alcoholic Drinks in Kenya report offers a comprehensive guide to the size and shape of the market at a national level. It provides the latest retail sales data (2017-2021), allowing you to identify the sectors driving growth. It identifies the leading companies, the leading brands and offers strategic analysis of key factors influencing the market - be they legislative, distribution or pricing issues. Forecasts to 2026 illustrate how the market is set to change.

Product coverage: Beer, Cider/Perry, RTDs, Spirits, Wine.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

Why buy this report?

- * Get a detailed picture of the Alcoholic Drinks market;
- * Pinpoint growth sectors and identify factors driving change;
- * Understand the competitive environment, the market's major players and leading brands;
- * Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop reliable information resources to help drive informed strategic planning.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table of Contents:

Alcoholic Drinks in Kenya
Euromonitor International
July 2022

List Of Contents And Tables

ALCOHOLIC DRINKS IN KENYA

EXECUTIVE SUMMARY

Alcoholic drinks in 2021: The big picture

2021 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

Alcohol and Tobacco Companies concern over proposed 21% Excise Duty

Summary 1 Taxation and Duty Levies on Alcoholic Drinks 2021

OPERATING ENVIRONMENT

Contraband/parallel trade

Duty free

Cross-border/private imports

KEY NEW PRODUCT LAUNCHES

Outlook

MARKET INDICATORS

Table 1 Retail Consumer Expenditure on Alcoholic Drinks 2016-2021

MARKET DATA

Table 2 Sales of Alcoholic Drinks by Category: Total Volume 2016-2021

Table 3 Sales of Alcoholic Drinks by Category: Total Value 2016-2021

Table 4 Sales of Alcoholic Drinks by Category: % Total Volume Growth 2016-2021

Table 5 Sales of Alcoholic Drinks by Category: % Total Value Growth 2016-2021

Table 6 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2021

Table 7 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2021

Table 8 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2021

Table 9 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2021

Table 10 GBO Company Shares of Alcoholic Drinks: % Total Volume 2017-2021

Table 11 Distribution of Alcoholic Drinks by Format: % Off-trade Value 2016-2021

Table 12 Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2020

Table 13 Forecast Sales of Alcoholic Drinks by Category: Total Volume 2021-2026

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 14 □Forecast Sales of Alcoholic Drinks by Category: Total Value 2021-2026

Table 15 □Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2021-2026

Table 16 □Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2021-2026

DISCLAIMER

SOURCES

Summary 2 Research Sources

BEER IN KENYA

KEY DATA FINDINGS

2021 DEVELOPMENTS

Positive recovery in 2021 as Kenyan's preference for beer continues to drive category growth

Pilsner, White Cap, Tusker Malt and Tusker Lite brands suffer from pandemic squeeze on incomes

Canned drinks gain popularity in COVID-19 pandemic

PROSPECTS AND OPPORTUNITIES

Consumption of keg beer set to record stable performance post COVID-19

Players continue to recover from the effects of the pandemic, while EABL set to maintain lead

Positive recovery post-Covid-19 with the easing of restrictions and lifting of night curfew

CATEGORY BACKGROUND

Lager price band methodology

Summary 3 Lager by Price Band 2020

CATEGORY DATA

Table 17 Sales of Beer by Category: Total Volume 2016-2021

Table 18 Sales of Beer by Category: Total Value 2016-2021

Table 19 Sales of Beer by Category: % Total Volume Growth 2016-2021

Table 20 Sales of Beer by Category: % Total Value Growth 2016-2021

Table 21 Sales of Beer by Off-trade vs On-trade: Volume 2016-2021

Table 22 Sales of Beer by Off-trade vs On-trade: Value 2016-2021

Table 23 Sales of Beer by Off-trade vs On-trade: % Volume Growth 2016-2021

Table 24 Sales of Beer by Off-trade vs On-trade: % Value Growth 2016-2021

Table 25 GBO Company Shares of Beer: % Total Volume 2017-2021

Table 26 □NBO Company Shares of Beer: % Total Volume 2017-2021

Table 27 □LBN Brand Shares of Beer: % Total Volume 2018-2021

Table 28 □Forecast Sales of Beer by Category: Total Volume 2021-2026

Table 29 □Forecast Sales of Beer by Category: Total Value 2021-2026

Table 30 □Forecast Sales of Beer by Category: % Total Volume Growth 2021-2026

Table 31 □Forecast Sales of Beer by Category: % Total Value Growth 2021-2026

WINE IN KENYA

KEY DATA FINDINGS

2021 DEVELOPMENTS

Wine category makes positive recovery

Wine tasting events helping to drive wine awareness

E-commerce wine sales boosted by the pandemic

PROSPECTS AND OPPORTUNITIES

Strong growth prospects makes wine a target for investors

Improving lifestyles and the rising middle-class consumer segment will drive wine consumption

Urbanization set to boost wine category sales

CATEGORY DATA

Table 32 Sales of Wine by Category: Total Volume 2016-2021

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 33 Sales of Wine by Category: Total Value 2016-2021

Table 34 Sales of Wine by Category: % Total Volume Growth 2016-2021

Table 35 Sales of Wine by Category: % Total Value Growth 2016-2021

Table 36 Sales of Wine by Off-trade vs On-trade: Volume 2016-2021

Table 37 Sales of Wine by Off-trade vs On-trade: Value 2016-2021

Table 38 Sales of Wine by Off-trade vs On-trade: % Volume Growth 2016-2021

Table 39 Sales of Wine by Off-trade vs On-trade: % Value Growth 2016-2021

Table 40 Forecast Sales of Wine by Category: Total Volume 2021-2026

Table 41 □Forecast Sales of Wine by Category: Total Value 2021-2026

Table 42 □Forecast Sales of Wine by Category: % Total Volume Growth 2021-2026

Table 43 □Forecast Sales of Wine by Category: % Total Value Growth 2021-2026

SPIRITS IN KENYA

KEY DATA FINDINGS

2021 DEVELOPMENTS

Gin craze explodes in Kenya as spirits witnesses strong recovery

Manufacturers drive development in whiskies to reach millennials

Cream-based liqueurs outperform despite pandemic

PROSPECTS AND OPPORTUNITIES

Liqueurs, whiskies and vodka to remain the best-selling spirits due to widespread appeal

Product innovations will be ramped up to capitalise on strong category growth

Packaging, taste and flavour among key drivers that will drive growth in the forecast period

CATEGORY DATA

Table 44 Sales of Spirits by Category: Total Volume 2016-2021

Table 45 Sales of Spirits by Category: Total Value 2016-2021

Table 46 Sales of Spirits by Category: % Total Volume Growth 2016-2021

Table 47 Sales of Spirits by Category: % Total Value Growth 2016-2021

Table 48 Sales of Spirits by Off-trade vs On-trade: Volume 2016-2021

Table 49 Sales of Spirits by Off-trade vs On-trade: Value 2016-2021

Table 50 Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2016-2021

Table 51 Sales of Spirits by Off-trade vs On-trade: % Value Growth 2016-2021

Table 52 GBO Company Shares of Spirits: % Total Volume 2017-2021

Table 53 □NBO Company Shares of Spirits: % Total Volume 2017-2021

Table 54 □LBN Brand Shares of Spirits: % Total Volume 2018-2021

Table 55 □Forecast Sales of Spirits by Category: Total Volume 2021-2026

Table 56 □Forecast Sales of Spirits by Category: Total Value 2021-2026

Table 57 □Forecast Sales of Spirits by Category: % Total Volume Growth 2021-2026

Table 58 □Forecast Sales of Spirits by Category: % Total Value Growth 2021-2026

CIDER/PERRY IN KENYA

KEY DATA FINDINGS

2021 DEVELOPMENTS

Female consumers and the middle-class driving category growth

Savanna Premium Dry Cider leads the category

Local brands target millennials with new ciders

PROSPECTS AND OPPORTUNITIES

Recovery in the forecast period post slow growth COVID-19

Brands push for visibility through event sponsorships

Demand for fruit ciders on the rise

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

CATEGORY DATA

Table 59 Sales of Cider/Perry: Total Volume 2016-2021

Table 60 Sales of Cider/Perry: Total Value 2016-2021

Table 61 Sales of Cider/Perry: % Total Volume Growth 2016-2021

Table 62 Sales of Cider/Perry: % Total Value Growth 2016-2021

Table 63 Sales of Cider/Perry by Off-trade vs On-trade: Volume 2016-2021

Table 64 Sales of Cider/Perry by Off-trade vs On-trade: Value 2016-2021

Table 65 Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2016-2021

Table 66 Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2016-2021

Table 67 GBO Company Shares of Cider/Perry: % Total Volume 2017-2021

Table 68 □NBO Company Shares of Cider/Perry: % Total Volume 2017-2021

Table 69 □LBN Brand Shares of Cider/Perry: % Total Volume 2018-2021

Table 70 □Forecast Sales of Cider/Perry: Total Volume 2021-2026

Table 71 □Forecast Sales of Cider/Perry: Total Value 2021-2026

Table 72 □Forecast Sales of Cider/Perry: % Total Volume Growth 2021-2026

Table 73 □Forecast Sales of Cider/Perry: % Total Value Growth 2021-2026

RTDS IN KENYA

KEY DATA FINDINGS

2021 DEVELOPMENTS

Convenience continues to drive demand for RTDs

Spirit-based RTDs remain most popular among consumers

Packaging, taste and flavour key factors driving RTD growth

PROSPECTS AND OPPORTUNITIES

Positive recovery in 2021 following slow growth in 2020 closure of social events and gatherings

Manufacturers target social media marketing to push brand sales

Growing demand for malt-based RTDs among female consumers

CATEGORY DATA

Table 74 Sales of RTDs by Category: Total Volume 2016-2021

Table 75 Sales of RTDs by Category: Total Value 2016-2021

Table 76 Sales of RTDs by Category: % Total Volume Growth 2016-2021

Table 77 Sales of RTDs by Category: % Total Value Growth 2016-2021

Table 78 Sales of RTDs by Off-trade vs On-trade: Volume 2016-2021

Table 79 Sales of RTDs by Off-trade vs On-trade: Value 2016-2021

Table 80 Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2016-2021

Table 81 Sales of RTDs by Off-trade vs On-trade: % Value Growth 2016-2021

Table 82 GBO Company Shares of RTDs: % Total Volume 2017-2021

Table 83 □NBO Company Shares of RTDs: % Total Volume 2017-2021

Table 84 □LBN Brand Shares of RTDs: % Total Volume 2018-2021

Table 85 □Forecast Sales of RTDs by Category: Total Volume 2021-2026

Table 86 □Forecast Sales of RTDs by Category: Total Value 2021-2026

Table 87 □Forecast Sales of RTDs by Category: % Total Volume Growth 2021-2026

Table 88 □Forecast Sales of RTDs by Category: % Total Value Growth 2021-2026

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Alcoholic Drinks in Kenya

Market Direction | 2022-07-28 | 56 pages | Euromonitor

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User Licence	€1750.00
	Multiple User License (1 Site)	€3500.00
	Multiple User License (Global)	€5250.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2025-05-05"/>
		Signature	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com