

Alcoholic Drinks in Kenya

Market Direction | 2023-06-27 | 61 pages | Euromonitor

AVAILABLE LICENSES:

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

Report description:

In 2022, the Kenyan alcoholic beverages sector witnessed both volume and value sales expansion, riding on the coattails of a burgeoning youth demographic and a recovery phase following the stringent COVID-19 regulations that gave a much-needed boost to on-trade sales.

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 (2018-2022), 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 2027 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.

Table of Contents:

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

List Of Contents And Tables

ALCOHOLIC DRINKS IN KENYA

EXECUTIVE SUMMARY

Alcoholic drinks in 2022: The big picture

2022 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 2022

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 2017-2022

MARKET DATA

Table 2 Sales of Alcoholic Drinks by Category: Total Volume 2017-2022

Table 3 Sales of Alcoholic Drinks by Category: Total Value 2017-2022

Table 4 Sales of Alcoholic Drinks by Category: % Total Volume Growth 2017-2022

Table 5 Sales of Alcoholic Drinks by Category: % Total Value Growth 2017-2022

Table 6 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2022

Table 7 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2022

Table 8 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2022

Table 9 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2022

Table 10 GBO Company Shares of Alcoholic Drinks: % Total Volume 2018-2022

Table 11 Distribution of Alcoholic Drinks by Format: % Off-trade Value 2017-2022

Table 12 Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2022

Table 13 Forecast Sales of Alcoholic Drinks by Category: Total Volume 2022-2027

Table 14 Forecast Sales of Alcoholic Drinks by Category: Total Value 2022-2027

Table 15 Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2022-2027

Table 16 ☐Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2022-2027

DISCLAIMER

SOURCES

Summary 2 Research Sources

BEER IN KENYA

KEY DATA FINDINGS

2022 DEVELOPMENTS

Informed consumer lifestyles drive product innovation

Local brands strive to remain competitive amid international players

Rise of e-commerce accelerates sales

PROSPECTS AND OPPORTUNITIES

Younger generations to gain greater priority as target consumers of beer

Consumer lifestyle changes will continue to guide innovation

Flavoured lager to gain greater ground thanks to rising interest from younger Kenyans

CATEGORY BACKGROUND

Lager price band methodology

Summary 3 Lager by Price Band 2022

Summary 4 Number of Breweries 2017-2022

CATEGORY DATA

Table 74 Sales of Beer by Category: Total Volume 2017-2022

Table 75 Sales of Beer by Category: Total Value 2017-2022

Table 76 Sales of Beer by Category: % Total Volume Growth 2017-2022

Table 77 Sales of Beer by Category: % Total Value Growth 2017-2022

Table 78 Sales of Beer by Off-trade vs On-trade: Volume 2017-2022

Table 79 Sales of Beer by Off-trade vs On-trade: Value 2017-2022

Table 80 Sales of Beer by Off-trade vs On-trade: % Volume Growth 2017-2022

Table 81 Sales of Beer by Off-trade vs On-trade: % Value Growth 2017-2022

Table 82 GBO Company Shares of Beer: % Total Volume 2018-2022

Table 83 ☐NBO Company Shares of Beer: % Total Volume 2018-2022

Table 84 ☐LBN Brand Shares of Beer: % Total Volume 2019-2022

Table 85 ☐Forecast Sales of Beer by Category: Total Volume 2022-2027

Table 86 ☐Forecast Sales of Beer by Category: Total Value 2022-2027

Table 87 ☐Forecast Sales of Beer by Category: % Total Volume Growth 2022-2027

Table 88 ☐Forecast Sales of Beer by Category: % Total Value Growth 2022-2027

WINE IN KENYA

KEY DATA FINDINGS

2022 DEVELOPMENTS

Improved consumer education and marketing strategies support sustained growth

Expanding retail sector further fuels wine consumption

Rising hospitality industry supports overall category growth

PROSPECTS AND OPPORTUNITIES

Demand for entry-level products set to rise as players push budget-friendly varieties

Globalisation impact to continue reshaping local market dynamics

Expansion of the retail sector will support future sales

CATEGORY DATA

Table 17 Sales of Wine by Category: Total Volume 2017-2022

Table 18 Sales of Wine by Category: Total Value 2017-2022

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Table 19 Sales of Wine by Category: % Total Volume Growth 2017-2022
Table 20 Sales of Wine by Category: % Total Value Growth 2017-2022
Table 21 Sales of Wine by Off-trade vs On-trade: Volume 2017-2022
Table 22 Sales of Wine by Off-trade vs On-trade: Value 2017-2022
Table 23 Sales of Wine by Off-trade vs On-trade: % Volume Growth 2017-2022
Table 24 Sales of Wine by Off-trade vs On-trade: % Value Growth 2017-2022
Table 25 Forecast Sales of Wine by Category: Total Volume 2022-2027
Table 26 □Forecast Sales of Wine by Category: Total Value 2022-2027
Table 27 □Forecast Sales of Wine by Category: % Total Volume Growth 2022-2027
Table 28 □Forecast Sales of Wine by Category: % Total Value Growth 2022-2027

SPIRITS IN KENYA

KEY DATA FINDINGS

2022 DEVELOPMENTS

International brands galvanise spirits in Kenya in 2022
Manufacturers introduce new flavours in a bid to woo consumers
Rethinking distribution channels for broader reach

PROSPECTS AND OPPORTUNITIES

Spirits players to heighten focus on younger Kenyans
Economy brands will continue to strengthen
International brands will expand within spirits in Kenya

CATEGORY DATA

Table 29 Sales of Spirits by Category: Total Volume 2017-2022
Table 30 Sales of Spirits by Category: Total Value 2017-2022
Table 31 Sales of Spirits by Category: % Total Volume Growth 2017-2022
Table 32 Sales of Spirits by Category: % Total Value Growth 2017-2022
Table 33 Sales of Spirits by Off-trade vs On-trade: Volume 2017-2022
Table 34 Sales of Spirits by Off-trade vs On-trade: Value 2017-2022
Table 35 Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2017-2022
Table 36 Sales of Spirits by Off-trade vs On-trade: % Value Growth 2017-2022
Table 37 GBO Company Shares of Spirits: % Total Volume 2018-2022
Table 38 □NBO Company Shares of Spirits: % Total Volume 2018-2022
Table 39 □LBN Brand Shares of Spirits: % Total Volume 2019-2022
Table 40 □Forecast Sales of Spirits by Category: Total Volume 2022-2027
Table 41 □Forecast Sales of Spirits by Category: Total Value 2022-2027
Table 42 □Forecast Sales of Spirits by Category: % Total Volume Growth 2022-2027
Table 43 □Forecast Sales of Spirits by Category: % Total Value Growth 2022-2027

CIDER/PERRY IN KENYA

KEY DATA FINDINGS

2022 DEVELOPMENTS

Emergence of new players boosts further growth in cider/perry in 2022
Surge in product variety is response to evolving consumer awareness
E-commerce channel proves profitable for cider/perry

PROSPECTS AND OPPORTUNITIES

Expansion of local cider production to propel growth
Innovative flavours will bolster sales
Retail expansion to support category expansion

CATEGORY DATA

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Table 44 Sales of Cider/Perry: Total Volume 2017-2022
 Table 45 Sales of Cider/Perry: Total Value 2017-2022
 Table 46 Sales of Cider/Perry: % Total Volume Growth 2017-2022
 Table 47 Sales of Cider/Perry: % Total Value Growth 2017-2022
 Table 48 Sales of Cider/Perry by Off-trade vs On-trade: Volume 2017-2022
 Table 49 Sales of Cider/Perry by Off-trade vs On-trade: Value 2017-2022
 Table 50 Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2017-2022
 Table 51 Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2017-2022
 Table 52 GBO Company Shares of Cider/Perry: % Total Volume 2018-2022
 Table 53 □NBO Company Shares of Cider/Perry: % Total Volume 2018-2022
 Table 54 □LBN Brand Shares of Cider/Perry: % Total Volume 2019-2022
 Table 55 □Forecast Sales of Cider/Perry: Total Volume 2022-2027
 Table 56 □Forecast Sales of Cider/Perry: Total Value 2022-2027
 Table 57 □Forecast Sales of Cider/Perry: % Total Volume Growth 2022-2027
 Table 58 □Forecast Sales of Cider/Perry: % Total Value Growth 2022-2027

RTDS IN KENYA

KEY DATA FINDINGS

2022 DEVELOPMENTS

Flavoured products fuel growth in 2022
 Convenience and pricing as key sales drivers
 Expansion of distribution channels boosts product availability

PROSPECTS AND OPPORTUNITIES

Innovation to be driven by demand for flavoured products
 E-commerce platforms will increasingly drive distribution
 Continued shift towards at-home consumption

CATEGORY DATA

Table 59 Sales of RTDs by Category: Total Volume 2017-2022
 Table 60 Sales of RTDs by Category: Total Value 2017-2022
 Table 61 Sales of RTDs by Category: % Total Volume Growth 2017-2022
 Table 62 Sales of RTDs by Category: % Total Value Growth 2017-2022
 Table 63 Sales of RTDs by Off-trade vs On-trade: Volume 2017-2022
 Table 64 Sales of RTDs by Off-trade vs On-trade: Value 2017-2022
 Table 65 Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2017-2022
 Table 66 Sales of RTDs by Off-trade vs On-trade: % Value Growth 2017-2022
 Table 67 GBO Company Shares of RTDs: % Total Volume 2018-2022
 Table 68 □NBO Company Shares of RTDs: % Total Volume 2018-2022
 Table 69 □LBN Brand Shares of RTDs: % Total Volume 2019-2022
 Table 70 □Forecast Sales of RTDs by Category: Total Volume 2022-2027
 Table 71 □Forecast Sales of RTDs by Category: Total Value 2022-2027
 Table 72 □Forecast Sales of RTDs by Category: % Total Volume Growth 2022-2027
 Table 73 □Forecast Sales of RTDs by Category: % Total Value Growth 2022-2027

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 | 2023-06-27 | 61 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="2025-05-07"/>
		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