

Alcoholic Drinks in Kenya

June 2023

Table of Contents

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 17 - Sales of Beer by Category: Total Volume 2017-2022
Table 18 - Sales of Beer by Category: Total Value 2017-2022
Table 19 - Sales of Beer by Category: % Total Volume Growth 2017-2022
Table 20 - Sales of Beer by Category: % Total Value Growth 2017-2022
Table 21 - Sales of Beer by Off-trade vs On-trade: Volume 2017-2022
Table 22 - Sales of Beer by Off-trade vs On-trade: Value 2017-2022
Table 23 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2017-2022
Table 24 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2017-2022
Table 25 - GBO Company Shares of Beer: % Total Volume 2018-2022
Table 26 - NBO Company Shares of Beer: % Total Volume 2018-2022
Table 27 - LBN Brand Shares of Beer: % Total Volume 2019-2022
Table 28 - Forecast Sales of Beer by Category: Total Volume 2022-2027
Table 29 - Forecast Sales of Beer by Category: Total Value 2022-2027
Table 30 - Forecast Sales of Beer by Category: % Total Volume Growth 2022-2027
Table 31 - Forecast Sales of Beer 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

Table 32 - Sales of Cider/Perry: Total Volume 2017-2022
Table 33 - Sales of Cider/Perry: Total Value 2017-2022
Table 34 - Sales of Cider/Perry: % Total Volume Growth 2017-2022

Table 35 - Sales of Cider/Perry: % Total Value Growth 2017-2022

Table 36 - Sales of Cider/Perry by Off-trade vs On-trade: Volume 2017-2022

Table 37 - Sales of Cider/Perry by Off-trade vs On-trade: Value 2017-2022

Table 38 - Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2017-2022

Table 39 - Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2017-2022

Table 40 - GBO Company Shares of Cider/Perry: % Total Volume 2018-2022

Table 41 - NBO Company Shares of Cider/Perry: % Total Volume 2018-2022

Table 42 - LBN Brand Shares of Cider/Perry: % Total Volume 2019-2022

Table 43 - Forecast Sales of Cider/Perry: Total Volume 2022-2027

Table 44 - Forecast Sales of Cider/Perry: Total Value 2022-2027

Table 45 - Forecast Sales of Cider/Perry: % Total Volume Growth 2022-2027

Table 46 - 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 47 - Sales of RTDs by Category: Total Volume 2017-2022

Table 48 - Sales of RTDs by Category: Total Value 2017-2022

Table 49 - Sales of RTDs by Category: % Total Volume Growth 2017-2022

Table 50 - Sales of RTDs by Category: % Total Value Growth 2017-2022

Table 51 - Sales of RTDs by Off-trade vs On-trade: Volume 2017-2022

Table 52 - Sales of RTDs by Off-trade vs On-trade: Value 2017-2022

Table 53 - Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2017-2022

Table 54 - Sales of RTDs by Off-trade vs On-trade: % Value Growth 2017-2022

Table 55 - GBO Company Shares of RTDs: % Total Volume 2018-2022

Table 56 - NBO Company Shares of RTDs: % Total Volume 2018-2022

Table 57 - LBN Brand Shares of RTDs: % Total Volume 2019-2022

Table 58 - Forecast Sales of RTDs by Category: Total Volume 2022-2027

Table 59 - Forecast Sales of RTDs by Category: Total Value 2022-2027

Table 60 - Forecast Sales of RTDs by Category: % Total Volume Growth 2022-2027

Table 61 - Forecast Sales of RTDs 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 62 - Sales of Spirits by Category: Total Volume 2017-2022
Table 63 - Sales of Spirits by Category: Total Value 2017-2022
Table 64 - Sales of Spirits by Category: % Total Volume Growth 2017-2022
Table 65 - Sales of Spirits by Category: % Total Value Growth 2017-2022
Table 66 - Sales of Spirits by Off-trade vs On-trade: Volume 2017-2022
Table 67 - Sales of Spirits by Off-trade vs On-trade: Value 2017-2022
Table 68 - Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2017-2022
Table 69 - Sales of Spirits by Off-trade vs On-trade: % Value Growth 2017-2022
Table 70 - GBO Company Shares of Spirits: % Total Volume 2018-2022
Table 71 - NBO Company Shares of Spirits: % Total Volume 2018-2022
Table 72 - LBN Brand Shares of Spirits: % Total Volume 2019-2022
Table 73 - Forecast Sales of Spirits by Category: Total Volume 2022-2027
Table 74 - Forecast Sales of Spirits by Category: Total Value 2022-2027
Table 75 - Forecast Sales of Spirits by Category: % Total Volume Growth 2022-2027
Table 76 - Forecast Sales of Spirits 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 77 - Sales of Wine by Category: Total Volume 2017-2022
Table 78 - Sales of Wine by Category: Total Value 2017-2022
Table 79 - Sales of Wine by Category: % Total Volume Growth 2017-2022
Table 80 - Sales of Wine by Category: % Total Value Growth 2017-2022
Table 81 - Sales of Wine by Off-trade vs On-trade: Volume 2017-2022
Table 82 - Sales of Wine by Off-trade vs On-trade: Value 2017-2022
Table 83 - Sales of Wine by Off-trade vs On-trade: % Volume Growth 2017-2022
Table 84 - Sales of Wine by Off-trade vs On-trade: % Value Growth 2017-2022
Table 85 - Forecast Sales of Wine by Category: Total Volume 2022-2027
Table 86 - Forecast Sales of Wine by Category: Total Value 2022-2027
Table 87 - Forecast Sales of Wine by Category: % Total Volume Growth 2022-2027
Table 88 - Forecast Sales of Wine by Category: % Total Value Growth 2022-2027

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.