

# Dairy Products and Alternatives in Kenya

September 2024

**Table of Contents** 

# Dairy Products and Alternatives in Kenya

#### **EXECUTIVE SUMMARY**

Dairy products and alternatives in 2024: The big picture

Key trends in 2024

Competitive landscape

Channel developments

What next for dairy products and alternatives?

#### MARKET DATA

- Table 1 Sales of Dairy Products and Alternatives by Category: Value 2019-2024
- Table 2 Sales of Dairy Products and Alternatives by Category: % Value Growth 2019-2024
- Table 3 NBO Company Shares of Dairy Products and Alternatives: % Value 2020-2024
- Table 4 LBN Brand Shares of Dairy Products and Alternatives: % Value 2021-2024
- Table 5 Penetration of Private Label by Category: % Value 2019-2024
- Table 6 Distribution of Dairy Products and Alternatives by Format: % Value 2019-2024
- Table 7 Forecast Sales of Dairy Products and Alternatives by Category: Value 2024-2029
- Table 8 Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2024-2029

#### DISCLAIMER

#### SOURCES

Summary 1 - Research Sources

## Baby Food in Kenya

# **KEY DATA FINDINGS**

# 2024 DEVELOPMENTS

Still high inflationary pressure favours retail value over volume growth

High prices and limits on distribution restrict access and demand

Global players dominate the competitive landscape

#### PROSPECTS AND OPPORTUNITIES

Upward sales trajectory to continue amid changing lifestyles

Convenience and healthier options to stimulate interest

VAT on milk formula remains a live issue

# **CATEGORY DATA**

- Table 9 Sales of Baby Food by Category: Volume 2019-2024
- Table 10 Sales of Baby Food by Category: Value 2019-2024
- Table 11 Sales of Baby Food by Category: % Volume Growth 2019-2024
- Table 12 Sales of Baby Food by Category: % Value Growth 2019-2024
- Table 13 NBO Company Shares of Baby Food: % Value 2020-2024
- Table 14 LBN Brand Shares of Baby Food: % Value 2021-2024
- Table 15 Distribution of Baby Food by Format: % Value 2019-2024
- Table 16 Forecast Sales of Baby Food by Category: Volume 2024-2029
- Table 17 Forecast Sales of Baby Food by Category: Value 2024-2029
- Table 18 Forecast Sales of Baby Food by Category: % Volume Growth 2024-2029
- Table 19 Forecast Sales of Baby Food by Category: % Value Growth 2024-2029

# Butter and Spreads in Kenya

# **KEY DATA FINDINGS**

# 2024 DEVELOPMENTS

Price increases dampen retail volume sales

Health concerns hinder the use of butter and spreads

Price promotions to gain and retain the loyalty of consumers

#### PROSPECTS AND OPPORTUNITIES

Promotions and health and wellness to pique the interest of consumers at different ends of the market

Price rises to limit cooking fats and margarine while butter is set to make a slow recovery amid rising awareness of healthier fats

Technological advances to stimulate butter in Kenya

# **CATEGORY DATA**

- Table 20 Sales of Butter and Spreads by Category: Volume 2019-2024
- Table 21 Sales of Butter and Spreads by Category: Value 2019-2024
- Table 22 Sales of Butter and Spreads by Category: % Volume Growth 2019-2024
- Table 23 Sales of Butter and Spreads by Category: % Value Growth 2019-2024
- Table 24 NBO Company Shares of Butter and Spreads: % Value 2020-2024
- Table 25 LBN Brand Shares of Butter and Spreads: % Value 2021-2024
- Table 26 Distribution of Butter and Spreads by Format: % Value 2019-2024
- Table 27 Forecast Sales of Butter and Spreads by Category: Volume 2024-2029
- Table 28 Forecast Sales of Butter and Spreads by Category: Value 2024-2029
- Table 29 Forecast Sales of Butter and Spreads by Category: % Volume Growth 2024-2029
- Table 30 Forecast Sales of Butter and Spreads by Category: % Value Growth 2024-2029

## Cheese in Kenya

## KEY DATA FINDINGS

# 2024 DEVELOPMENTS

Price rises continue to hamper demand

Players and consumers experiment with cheese

The competitive landscape is intensifying

#### PROSPECTS AND OPPORTUNITIES

Positive outlook for cheese amid retail and foodservice developments

Higher milk production to boost local cheese manufacturing

Cheese to see technological and production advancements

### **CATEGORY DATA**

- Table 31 Sales of Cheese by Category: Volume 2019-2024
- Table 32 Sales of Cheese by Category: Value 2019-2024
- Table 33 Sales of Cheese by Category: % Volume Growth 2019-2024
- Table 34 Sales of Cheese by Category: % Value Growth 2019-2024
- Table 35 Sales of Spreadable Cheese by Type: % Value 2019-2024
- Table 36 Sales of Soft Cheese by Type: % Value 2019-2024

  Table 37 Sales of Hard Cheese by Type: % Value 2019-2024
- Table 28 NBO Common Character Chance of Chance (V. Value 2020, 2021
- Table 38 NBO Company Shares of Cheese: % Value 2020-2024
- Table 39 LBN Brand Shares of Cheese: % Value 2021-2024
- Table 40 Distribution of Cheese by Format: % Value 2019-2024
- Table 41 Forecast Sales of Cheese by Category: Volume 2024-2029
- Table 42 Forecast Sales of Cheese by Category: Value 2024-2029
- Table 43 Forecast Sales of Cheese by Category: % Volume Growth 2024-2029
- Table 44 Forecast Sales of Cheese by Category: % Value Growth 2024-2029

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Move to more formalised milk sales improves the category performance

Milk ATMS continue to threaten packaged milk sales

Taste and nutrition perceptions support fresh milk while more affluent consumers boost the demand for dairy only flavoured milk drinks

#### PROSPECTS AND OPPORTUNITIES

Increases in retail volume sales as price rises slow

Kenya Dairy Board aims to foster improvements in dairy

Health and wellness and milk safety to the fore

## **CATEGORY DATA**

- Table 45 Sales of Drinking Milk Products by Category: Volume 2019-2024
- Table 46 Sales of Drinking Milk Products by Category: Value 2019-2024
- Table 47 Sales of Drinking Milk Products by Category: % Volume Growth 2019-2024
- Table 48 Sales of Drinking Milk Products by Category: % Value Growth 2019-2024
- Table 49 NBO Company Shares of Drinking Milk Products: % Value 2020-2024
- Table 50 LBN Brand Shares of Drinking Milk Products: % Value 2021-2024
- Table 51 Distribution of Drinking Milk Products by Format: % Value 2019-2024
- Table 52 Forecast Sales of Drinking Milk Products by Category: Volume 2024-2029
- Table 53 Forecast Sales of Drinking Milk Products by Category: Value 2024-2029
- Table 54 Forecast Sales of Drinking Milk Products by Category: % Volume Growth 2024-2029
- Table 55 Forecast Sales of Drinking Milk Products by Category: % Value Growth 2024-2029

# Yoghurt and Sour Milk Products in Kenya

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Smaller packs and price promotions help to maintain demand

Price rises and the offer of a quality local offer boost retail value sales

Players respond to the consumer call for healthier options

# PROSPECTS AND OPPORTUNITIES

Positive outlook as product awareness and appreciation rise

Strong growth potential for sour milk products

Investments in technology to improve production efficiencies

# **CATEGORY DATA**

- Table 56 Sales of Yoghurt and Sour Milk Products by Category: Volume 2019-2024
- Table 57 Sales of Yoghurt and Sour Milk Products by Category: Value 2019-2024
- Table 58 Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2019-2024
- Table 59 Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2019-2024
- Table 60 Sales of Flavoured Yoghurt by Flavour: Rankings 2019-2024
- Table 61 NBO Company Shares of Yoghurt and Sour Milk Products: % Value 2020-2024
- Table 62 LBN Brand Shares of Yoghurt and Sour Milk Products: % Value 2021-2024
- Table 63 Distribution of Yoghurt and Sour Milk Products by Format: % Value 2019-2024
- Table 64 Forecast Sales of Yoghurt and Sour Milk Products by Category: Volume 2024-2029
- Table 65 Forecast Sales of Yoghurt and Sour Milk Products by Category: Value 2024-2029
- Table 66 Forecast Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2024-2029
- Table 67 Forecast Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2024-2029

## Other Dairy in Kenya

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Cream remains the only significant category in other dairy

High prices hamper the potential for cream in the market

Low awareness and knowledge of use hinder take-off of condensed milk

## PROSPECTS AND OPPORTUNITIES

Other dairy is set to remain an underdeveloped category

Wider distribution is required to strengthen other dairy's foothold

Stronger cold chain distribution systems to boost the offer of chilled other dairy

#### **CATEGORY DATA**

Table 68 - Sales of Other Dairy by Category: Volume 2019-2024

Table 69 - Sales of Other Dairy by Category: Value 2019-2024

Table 70 - Sales of Other Dairy by Category: % Volume Growth 2019-2024

Table 71 - Sales of Other Dairy by Category: % Value Growth 2019-2024

Table 72 - Sales of Cream by Type: % Value 2019-2024

Table 73 - NBO Company Shares of Other Dairy: % Value 2020-2024

Table 74 - LBN Brand Shares of Other Dairy: % Value 2021-2024

Table 75 - Distribution of Other Dairy by Format: % Value 2019-2024

Table 76 - Forecast Sales of Other Dairy by Category: Volume 2024-2029

Table 77 - Forecast Sales of Other Dairy by Category: Value 2024-2029

Table 78 - Forecast Sales of Other Dairy by Category: % Volume Growth 2024-2029

Table 79 - Forecast Sales of Other Dairy by Category: % Value Growth 2024-2029

# 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 focusing 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/dairy-products-and-alternatives-in-kenya/report.