

Soft Drinks in Kenya

February 2024

Table of Contents

Soft Drinks in Kenya

EXECUTIVE SUMMARY

Soft drinks in 2023: The big picture 2023 key trends Competitive landscape Retailing developments. Foodservice vs retail split. What next for soft drinks?

MARKET DATA

Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2018-2023 Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2018-2023 Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2018-2023 Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2018-2023 Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2023 Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2023 Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2023 Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2023 Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2018-2023 Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2018-2023 Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2018-2023 Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2018-2023 Table 13 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2019-2023 Table 14 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2023 Table 15 - NBO Company Shares of Off-trade Soft Drinks: % Value 2019-2023 Table 16 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2020-2023 Table 17 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2018-2023 Table 18 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2023 Table 19 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2023-2028 Table 20 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2023-2028 Table 21 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2023-2028 Table 22 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2023-2028 Table 23 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2023-2028 Table 24 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2023-2028 Table 25 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2023-2028 Table 26 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Bottled Water in Kenya

KEY DATA FINDINGS

2023 DEVELOPMENTS

Retail demand remains robust despite slowdown Consumption still heavily concentrated in off-trade channels Intense competition continues to fuel brand differentiation efforts

PROSPECTS AND OPPORTUNITIES

Limited access to safe drinking water will continue to buoy off-trade volume sales

More players expected to introduce flavoured and functional products Sustainability initiatives will remain focused on packaging

CATEGORY DATA

Table 27 - Off-trade Sales of Bottled Water by Category: Volume 2018-2023
Table 28 - Off-trade Sales of Bottled Water by Category: Value 2018-2023
Table 29 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2018-2023
Table 30 - Off-trade Sales of Bottled Water by Category: % Value Growth 2018-2023
Table 31 - NBO Company Shares of Off-trade Bottled Water: % Volume 2019-2023
Table 32 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2020-2023
Table 33 - NBO Company Shares of Off-trade Bottled Water: % Value 2019-2023
Table 34 - LBN Brand Shares of Off-trade Bottled Water: % Value 2020-2023
Table 35 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2023-2028
Table 36 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2023-2028
Table 37 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2023-2028
Table 38 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2023-2028

Carbonates in Kenya

KEY DATA FINDINGS

2023 DEVELOPMENTS

Favourable demographic and socioeconomic trends continue to buoy demand Coca-Cola launches Recipe For Magic prize competition Highlands expands Club Soda range with lemonade/lime variant

PROSPECTS AND OPPORTUNITIES

Maturity and changing consumer preferences expected to temper volume growth Reduced sugar and sugar-free varieties will be a focal point for innovation Further distribution gains likely for the e-commerce channel

CATEGORY DATA

Table 39 - Off-trade vs On-trade Sales of Carbonates: Volume 2018-2023 Table 40 - Off-trade vs On-trade Sales of Carbonates: Value 2018-2023 Table 41 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2018-2023 Table 42 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2018-2023 Table 43 - Off-trade Sales of Carbonates by Category: Volume 2018-2023 Table 44 - Off-trade Sales of Carbonates by Category: Value 2018-2023 Table 45 - Off-trade Sales of Carbonates by Category: % Volume Growth 2018-2023 Table 46 - Off-trade Sales of Carbonates by Category: % Value Growth 2018-2023 Table 47 - NBO Company Shares of Off-trade Carbonates: % Volume 2019-2023 Table 48 - LBN Brand Shares of Off-trade Carbonates: % Volume 2020-2023 Table 49 - NBO Company Shares of Off-trade Carbonates: % Value 2019-2023 Table 50 - LBN Brand Shares of Off-trade Carbonates: % Value 2020-2023 Table 51 - Forecast Off-trade Sales of Carbonates by Category: Volume 2023-2028 Table 52 - Forecast Off-trade Sales of Carbonates by Category: Value 2023-2028 Table 53 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2023-2028 Table 54 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2023-2028

Concentrates in Kenya

KEY DATA FINDINGS

2023 DEVELOPMENTS

Easing of the pandemic and health concerns subdue demand for liquid concentrates Appeal of powder concentrates continues to dwindle Milly launches new Picana range made with real fruit pulp

PROSPECTS AND OPPORTUNITIES

Unit volume sales of liquid concentrates set to decline steadily Manufacturers expected to focus on developing new health-oriented products Concentrates producers will continue working to improve sustainability credentials

CATEGORY DATA

Concentrates Conversions Summary 2 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format Table 55 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2018-2023 Table 56 - Off-trade Sales of Concentrates by Category: Value 2018-2023 Table 57 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2018-2023 Table 58 - Off-trade Sales of Concentrates by Category: % Value Growth 2018-2023 Table 59 - NBO Company Shares of Off-trade Concentrates (RTD): % Volume 2019-2023 Table 60 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2020-2023 Table 61 - NBO Company Shares of Off-trade Concentrates: % Value 2019-2023 Table 62 - LBN Brand Shares of Off-trade Concentrates: % Value 2020-2023 Table 63 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2019-2023 Table 64 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2020-2023 Table 65 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2023-2028 Table 66 - Forecast Off-trade Sales of Concentrates by Category: Value 2023-2028 Table 67 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2023-2028 Table 68 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2023-2028

Juice in Kenya

KEY DATA FINDINGS

2023 DEVELOPMENTS

Retail demand slows as high inflation drives up prices and erodes purchasing power Innovation helps Kevian Kenya Ltd to consolidate its leadership Coca-Cola makes its Minute Maid brand available in new Tetra Pak carton

PROSPECTS AND OPPORTUNITIES

Retail demand for 100% juice set to decline consistently Nectars (25-99% juice) expected to post strongest growth in off-trade volume sales Health and wellness trend will continue to shape new product development activity

CATEGORY DATA

Table 69 - Off-trade Sales of Juice by Category: Volume 2018-2023
Table 70 - Off-trade Sales of Juice by Category: Value 2018-2023
Table 71 - Off-trade Sales of Juice by Category: % Volume Growth 2018-2023
Table 72 - Off-trade Sales of Juice by Category: % Value Growth 2018-2023
Table 73 - NBO Company Shares of Off-trade Juice: % Volume 2019-2023
Table 74 - LBN Brand Shares of Off-trade Juice: % Volume 2020-2023
Table 75 - NBO Company Shares of Off-trade Juice: % Value 2019-2023
Table 76 - LBN Brand Shares of Off-trade Juice: % Value 2020-2023
Table 77 - Forecast Off-trade Sales of Juice by Category: Volume 2023-2028
Table 78 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2023-2028
Table 79 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2023-2028
Table 80 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2023-2028

Energy Drinks in Kenya

KEY DATA FINDINGS

2023 DEVELOPMENTS

Busier lifestyles strengthen appreciation for stimulant effect of energy drinks Young adults remain the core target demographic for promotional activities Red Bull maintains huge lead as high inflation increases appeal of cheaper brands

PROSPECTS AND OPPORTUNITIES

Robust growth in off-trade volume sales projected Reduced sugar category set to show the fastest development Producers will continue to increase investment in social media advertising

CATEGORY DATA

Table 81 - Off-trade Sales of Energy Drinks: Volume 2018-2023Table 82 - Off-trade Sales of Energy Drinks: Value 2018-2023Table 83 - Off-trade Sales of Energy Drinks: % Volume Growth 2018-2023Table 84 - Off-trade Sales of Energy Drinks: % Value Growth 2018-2023Table 85 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2019-2023Table 86 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2019-2023Table 87 - NBO Company Shares of Off-trade Energy Drinks: % Value 2019-2023Table 88 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2019-2023Table 88 - BN Brand Shares of Off-trade Energy Drinks: % Value 2020-2023Table 89 - Forecast Off-trade Sales of Energy Drinks: Volume 2023-2028Table 90 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2023-2028Table 91 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2023-2028Table 92 - Forecast Off-trade Sales of Energy Drinks: % 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/soft-drinks-in-kenya/report.