



# 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: Value 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: % Value 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: Value 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

### 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 2018-2023  
Table 82 - Off-trade Sales of Energy Drinks: Value 2018-2023  
Table 83 - Off-trade Sales of Energy Drinks: % Volume Growth 2018-2023  
Table 84 - Off-trade Sales of Energy Drinks: % Value Growth 2018-2023  
Table 85 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2019-2023  
Table 86 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2020-2023  
Table 87 - NBO Company Shares of Off-trade Energy Drinks: % Value 2019-2023  
Table 88 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2020-2023  
Table 89 - Forecast Off-trade Sales of Energy Drinks: Volume 2023-2028  
Table 90 - Forecast Off-trade Sales of Energy Drinks: Value 2023-2028  
Table 91 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2023-2028  
Table 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](http://www.euromonitor.com/soft-drinks-in-kenya/report).