



Cigarettes in Kenya

June 2024

Table of Contents

Cigarettes in Kenya - Category analysis

KEY DATA FINDINGS

2023 DEVELOPMENTS

Cigarette sales continue to suffer due to the influx of illicit products
BAT Kenya maintains its robust lead, while net profits decline due to myriad factors
Consumers still continue to smoke cigarettes

PROSPECTS AND OPPORTUNITIES

Strategic shifts and innovations set to support baseline sales
Ongoing trend for Khat consumption may help to support cigarettes sales
E-cigarettes pose a challenge to the growth of traditional cigarettes

TAXATION AND PRICING

Taxation rates
Summary 1 - Taxation and Duty Levies 2018-2023
Average cigarette pack price breakdown
Summary 2 - Average Cigarette Pack Price Breakdown: Brand Examples

CATEGORY DATA

Table 1 - Sales of Cigarettes: Volume 2018-2023
Table 2 - Sales of Cigarettes by Category: Value 2018-2023
Table 3 - Sales of Cigarettes: % Volume Growth 2018-2023
Table 4 - Sales of Cigarettes by Category: % Value Growth 2018-2023
Table 5 - Sales of Cigarettes by Blend: % Volume 2018-2023
Table 6 - Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2018-2023
Table 7 - Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2018-2023
Table 8 - Sales of Cigarettes by Pack Size: % Volume 2018-2023
Table 9 - Sales of Cigarettes by Price Band: % Volume 2018-2023
Table 10 - NBO Company Shares of Cigarettes: % Volume 2019-2023
Table 11 - LBN Brand Shares of Cigarettes: % Volume 2020-2023
Table 12 - Sales of Cigarettes by Distribution Format: % Volume 2018-2023
Table 13 - Illicit Trade Estimate of Cigarettes: Volume 2018-2023
Table 14 - Forecast Sales of Cigarettes: Volume 2023-2028
Table 15 - Forecast Sales of Cigarettes by Category: Value 2023-2028
Table 16 - Forecast Sales of Cigarettes: % Volume Growth 2023-2028
Table 17 - Forecast Sales of Cigarettes by Category: % Value Growth 2023-2028
Table 18 - Forecast Sales of Cigarettes by Blend: % Volume 2023-2028
Table 19 - Forecast Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2023-2028
Table 20 - Forecast Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2023-2028
Table 21 - Forecast Sales of Cigarettes by Pack Size: % Volume 2023-2028
Table 22 - Forecast Sales of Cigarettes by Price Band: % Volume 2023-2028

Tobacco in Kenya - Industry Overview

EXECUTIVE SUMMARY

Tobacco in 2023: The big picture
2023 key trends
Competitive landscape
Retailing developments
What next for tobacco?

OPERATING ENVIRONMENT

Legislation

Legislative overview

Summary 3 - Legislation Summary at a Glance

Minimum legal smoking age

Smoking prevalence

Tar levels

Health warnings

Plain packaging

Advertising and sponsorship

Point-of-sale display bans

Smoking in public places

Low ignition propensity (LIP) cigarette regulation

Flavoured tobacco product ban

Reduced harm

Vapour products

PRODUCTION/IMPORTS/EXPORTS

MARKET INDICATORS

Table 23 - Number of Adult Smokers by Gender 2018-2023

MARKET DATA

Table 24 - Sales of Tobacco by Category: Volume 2018-2023

Table 25 - Sales of Tobacco by Category: Value 2018-2023

Table 26 - Sales of Tobacco by Category: % Volume Growth 2018-2023

Table 27 - Sales of Tobacco by Category: % Value Growth 2018-2023

Table 28 - Forecast Sales of Tobacco by Category: Volume 2023-2028

Table 29 - Forecast Sales of Tobacco by Category: Value 2023-2028

Table 30 - Forecast Sales of Tobacco by Category: % Volume Growth 2023-2028

Table 31 - Forecast Sales of Tobacco by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 4 - Research Sources

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/cigarettes-in-kenya/report.