



Euromonitor
International

Coffee in Kenya

December 2025

Table of Contents

Coffee in Kenya - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Rising interest in coffee

INDUSTRY PERFORMANCE

Emerging coffee culture in Kenya supported by promotional campaigns

Instant coffee benefits from its low cost and convenience

WHAT'S NEXT?

Developing coffee culture supports future growth

Technological advancements ensure enhanced innovation

More sustainable practices anticipated

COMPETITIVE LANDSCAPE

Nestlé Foods Kenya Ltd leads thanks to its strong position in instant coffee

C Dorman has a commanding lead in fresh coffee

CHANNELS

Supermarkets retain their lead

Consumers value the convenience of e-commerce

CATEGORY DATA

Table 1 - Retail Sales of Coffee by Category: Volume 2020-2025

Table 2 - Retail Sales of Coffee by Category: Value 2020-2025

Table 3 - Retail Sales of Coffee by Category: % Volume Growth 2020-2025

Table 4 - Retail Sales of Coffee by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Coffee: % Retail Value 2021-2025

Table 6 - LBN Brand Shares of Coffee: % Retail Value 2022-2025

Table 7 - Forecast Retail Sales of Coffee by Category: Volume 2025-2030

Table 8 - Forecast Retail Sales of Coffee by Category: Value 2025-2030

Table 9 - Forecast Retail Sales of Coffee by Category: % Volume Growth 2025-2030

Table 10 - Forecast Retail Sales of Coffee by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Hot Drinks in Kenya - Industry Overview

EXECUTIVE SUMMARY

Tea remains Kenya's most popular hot drink

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Population growth and urbanisation underpin rising demand for hot drinks

Downtrading amid rising price sensitivity

New products shape market expansion

WHAT'S NEXT?

Growth fuelled by rising disposable incomes, urbanisation and population growth

Enhanced product visibility and availability via e-commerce and modernisation of the retail landscape

Promotion of green value chains and regenerative agriculture

COMPETITIVE LANDSCAPE

Kenya Tea Packers maintains its leading position in 2025

Smaller players gaining traction with innovative products and aggressive marketing strategies

CHANNELS

Consumers value the pricing and convenience of supermarkets

Growing number of e-commerce platforms drives online sales

Foodservice vs retail split

MARKET DATA

Table 11 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2020-2025

Table 12 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2020-2025

Table 13 - Retail Sales of Hot Drinks by Category: Volume 2020-2025

Table 14 - Retail Sales of Hot Drinks by Category: Value 2020-2025

Table 15 - Retail Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 16 - Retail Sales of Hot Drinks by Category: % Value Growth 2020-2025

Table 17 - Foodservice Sales of Hot Drinks by Category: Volume 2020-2025

Table 18 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 19 - Total Sales of Hot Drinks by Category: Total Volume 2020-2025

Table 20 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2020-2025

Table 21 - NBO Company Shares of Hot Drinks: % Retail Value 2021-2025

Table 22 - LBN Brand Shares of Hot Drinks: % Retail Value 2022-2025

Table 23 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2020-2025

Table 24 - Retail Distribution of Hot Drinks by Format: % Volume 2020-2025

Table 25 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2025

Table 26 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2025-2030

Table 27 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2025-2030

Table 28 - Forecast Retail Sales of Hot Drinks by Category: Volume 2025-2030

Table 29 - Forecast Retail Sales of Hot Drinks by Category: Value 2025-2030

Table 30 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 31 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2025-2030

Table 32 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2025-2030

Table 33 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 34 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2025-2030

Table 35 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - 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/coffee-in-kenya/report.