



Euromonitor
International

Tobacco in Kenya

July 2025

Table of Contents

EXECUTIVE SUMMARY

- Tobacco in 2024: The big picture
- 2024 key trends
- Competitive landscape
- Retail developments
- What next for tobacco?

OPERATING ENVIRONMENT

- Legislation
- Legislative overview
- Summary 1 - 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 1 - Number of Adult Smokers by Gender 2019-2024

MARKET DATA

- Table 2 - Sales of Tobacco by Category: Volume 2019-2024
- Table 3 - Sales of Tobacco by Category: Value 2019-2024
- Table 4 - Sales of Tobacco by Category: % Volume Growth 2019-2024
- Table 5 - Sales of Tobacco by Category: % Value Growth 2019-2024
- Table 6 - Forecast Sales of Tobacco by Category: Volume 2024-2029
- Table 7 - Forecast Sales of Tobacco by Category: Value 2024-2029
- Table 8 - Forecast Sales of Tobacco by Category: % Volume Growth 2024-2029
- Table 9 - Forecast Sales of Tobacco by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

- Summary 2 - Research Sources

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Regulatory pressure and social shifts contribute to ongoing decline in smoking
- Established brands lose share as new players expand through innovation and diversification
- Expansion of physical retail supports dominance of grocery retailers

PROSPECTS AND OPPORTUNITIES

Consumer shifts continue to drive down cigarette volumes
Illicit trade on the rise while legal cigarette sales struggle to recover
Innovation set to shape the future of tobacco in Kenya

TAXATION AND PRICING

Average cigarette pack price breakdown
Summary 3 - Average Cigarette Pack Price Breakdown: Brand Examples

CATEGORY DATA

- Table 10 - Sales of Cigarettes: Volume 2019-2024
- Table 11 - Sales of Cigarettes by Category: Value 2019-2024
- Table 12 - Sales of Cigarettes: % Volume Growth 2019-2024
- Table 13 - Sales of Cigarettes by Category: % Value Growth 2019-2024
- Table 14 - Sales of Cigarettes by Blend: % Volume 2019-2024
- Table 15 - Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2019-2024
- Table 16 - Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2019-2024
- Table 17 - Sales of Cigarettes by Pack Size: % Volume 2019-2024
- Table 18 - Sales of Cigarettes by Price Band: % Volume 2019-2024
- Table 19 - NBO Company Shares of Cigarettes: % Volume 2020-2024
- Table 20 - LBN Brand Shares of Cigarettes: % Volume 2021-2024
- Table 21 - Sales of Cigarettes by Distribution Format: % Volume 2019-2024
- Table 22 - Illicit Trade Estimate of Cigarettes: Volume 2019-2024
- Table 23 - Forecast Sales of Cigarettes: Volume 2024-2029
- Table 24 - Forecast Sales of Cigarettes by Category: Value 2024-2029
- Table 25 - Forecast Sales of Cigarettes: % Volume Growth 2024-2029
- Table 26 - Forecast Sales of Cigarettes by Category: % Value Growth 2024-2029
- Table 27 - Forecast Sales of Cigarettes by Blend: % Volume 2024-2029
- Table 28 - Forecast Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2024-2029
- Table 29 - Forecast Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2024-2029
- Table 30 - Forecast Sales of Cigarettes by Pack Size: % Volume 2024-2029
- Table 31 - Forecast Sales of Cigarettes by Price Band: % Volume 2024-2029

Cigars, Cigarillos and Smoking Tobacco in Kenya

KEY DATA FINDINGS

2024 DEVELOPMENTS

Social repositioning and product experiences help cigars gain traction
Smoke Shop Africa remains dominant despite rising alternatives
Retail e-commerce expands despite offline retail dominance

PROSPECTS AND OPPORTUNITIES

Gradual growth anticipated as population and tobacco use expand
Premiumisation and mass market strategies to support category dynamism
Innovation and consumer focus to shape future product development

CATEGORY DATA

- Table 32 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2019-2024
- Table 33 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2019-2024
- Table 34 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2019-2024
- Table 35 - Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2019-2024
- Table 36 - Sales of Cigars by Size: % Volume 2019-2024

Table 37 - Sales of Cigarillos by Price Platform 2019-2024
Table 38 - NBO Company Shares of Cigars and Cigarillos: % Volume 2020-2024
Table 39 - LBN Brand Shares of Cigars and Cigarillos: % Volume 2021-2024
Table 40 - NBO Company Shares of Cigars: % Volume 2020-2024
Table 41 - LBN Brand Shares of Cigars: % Volume 2021-2024
Table 42 - NBO Company Shares of Cigarillos: % Volume 2020-2024
Table 43 - LBN Brand Shares of Cigarillos: % Volume 2021-2024
Table 44 - NBO Company Shares of Smoking Tobacco: % Volume 2020-2024
Table 45 - LBN Brand Shares of Smoking Tobacco: % Volume 2021-2024
Table 46 - NBO Company Shares of Pipe Tobacco: % Volume 2020-2024
Table 47 - LBN Brand Shares of Pipe Tobacco: % Volume 2021-2024
Table 48 - NBO Company Shares of Fine Cut Tobacco: % Volume 2020-2024
Table 49 - LBN Brand Shares of Fine Cut Tobacco: % Volume 2021-2024
Table 50 - Distribution of Cigars and Cigarillos by Format: % Volume 2019-2024
Table 51 - Distribution of Smoking Tobacco by Format: % Volume 2019-2024
Table 52 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2024-2029
Table 53 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2024-2029
Table 54 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2024-2029
Table 55 - Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2024-2029

Smokeless Tobacco, E-Vapour Products and Heated Tobacco in Kenya

KEY DATA FINDINGS

2024 DEVELOPMENTS

Consumer preferences continue to shift as socioeconomic and behavioural factors shape demand
Market leaders consolidate share through diversification and digital engagement
Distribution landscape continues to evolve as digital access reshapes purchasing patterns

PROSPECTS AND OPPORTUNITIES

Category growth expected to benefit from innovation and digital expansion
Retail landscape will evolve as modern trade and digital platforms grow in prominence
Technology-driven innovation to reshape product access and brand engagement

CATEGORY INDICATORS

Table 56 - Number of Adult Vapers 2019-2024

CATEGORY DATA

Table 57 - Sales of Smokeless Tobacco by Category: Volume 2019-2024
Table 58 - Sales of Smokeless Tobacco by Category: % Volume Growth 2019-2024
Table 59 - Sales of E-Vapour Products by Category: Volume 2019-2024
Table 60 - Sales of E-Vapour Products by Category: % Volume Growth 2019-2024
Table 61 - Sales of Tobacco Heating Devices: Volume 2019-2024
Table 62 - Sales of Tobacco Heating Devices: % Volume Growth 2019-2024
Table 63 - Sales of Heated Tobacco: Volume 2019-2024
Table 64 - Sales of Heated Tobacco: % Volume Growth 2019-2024
Table 65 - Sales of Tobacco Free Oral Nicotine: Volume 2019-2024
Table 66 - Sales of Tobacco Free Oral Nicotine: % Volume Growth 2019-2024
Table 67 - Sales of Tobacco Free Oral Nicotine by Category: Value 2019-2024
Table 68 - Sales of Tobacco Free Oral Nicotine: % Value Growth 2019-2024
Table 69 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2019-2024
Table 70 - Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2019-2024
Table 71 - Sales of E-Liquids by Nicotine Strength: % Value 2021-2024
Table 72 - NBO Company Shares of Smokeless Tobacco: % Volume 2020-2024

Table 73 - LBN Brand Shares of Smokeless Tobacco: % Volume 2021-2024

Table 74 - NBO Company Shares of E-Vapour Products: % Value 2020-2024

Table 75 - LBN Brand Shares of E-Vapour Products: % Value 2021-2024

Table 76 - NBO Company Shares of Tobacco Heating Devices: % Volume 2020-2024

Table 77 - LBN Brand Shares of Tobacco Heating Devices: % Volume 2021-2024

Table 78 - NBO Company Shares of Heated Tobacco: % Volume 2020-2024

Table 79 - LBN Brand Shares of Heated Tobacco: % Volume 2021-2024

Table 80 - NBO Company Shares of Tobacco Free Oral Nicotine: % Volume 2020-2024

Table 81 - LBN Brand Shares of Tobacco Free Oral Nicotine: % Volume 2021-2024

Table 82 - Distribution of Smokeless Tobacco by Format: % Volume 2019-2024

Table 83 - Distribution of E-Vapour Products by Format: % Value 2019-2024

Table 84 - Distribution of Tobacco Heating Devices by Format: % Volume 2019-2024

Table 85 - Distribution of Heated Tobacco by Format: % Volume 2019-2024

Table 86 - Forecast Sales of Smokeless Tobacco by Category: Volume 2024-2029

Table 87 - Forecast Sales of Smokeless Tobacco by Category: % Volume Growth 2024-2029

Table 88 - Forecast Sales of E-Vapour Products by Category: Volume 2024-2029

Table 89 - Forecast Sales of E-Vapour Products by Category: % Volume Growth 2024-2029

Table 90 - Forecast Sales of Tobacco Heating Devices: Volume 2024-2029

Table 91 - Forecast Sales of Tobacco Heating Devices: % Volume Growth 2024-2029

Table 92 - Forecast Sales of Heated Tobacco: Volume 2024-2029

Table 93 - Forecast Sales of Heated Tobacco: % Volume Growth 2024-2029

Table 94 - Forecast Sales of Tobacco Free Oral Nicotine: Volume 2024-2029

Table 95 - Forecast Sales of Tobacco Free Oral Nicotine: % Volume Growth 2024-2029

Table 96 - Forecast Sales of Tobacco Free Oral Nicotine by Category: Value 2024-2029

Table 97 - Forecast Sales of Tobacco Free Oral Nicotine by Category: % Value Growth 2024-2029

Table 98 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2024-2029

Table 99 - Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco 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 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/tobacco-in-kenya/report.