



Euromonitor
International

Nicotine in Kenya

July 2026

Table of Contents

EXECUTIVE SUMMARY

2025 Developments

KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

Chart 1 - Key Industry Trends for Nicotine

INDUSTRY PERFORMANCE

Smokers Seeking Affordability Opt for Low-Cost and Illicit Alternatives

Tightening Regulation Impacts Product Distribution

Chart 2 - Volume Sales 2020-2030

Chart 3 - Volume Sales by Category 2025

WHAT'S NEXT?

Illicit Brands and Vapes to Shift Demand as Smokers Seek Value

Chart 4 - Analyst Insight for Nicotine

Chart 5 - Forecast Volume Sales 2020-2030

Chart 6 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Bat Kenya Responds to Illicit Competition by Leveraging Distribution and Efficiency

Chart 7 - Company Shares 2025

Chart 8 - Brand Shares 2025

CHANNELS

Grocery Retailers Win Consumer Trust through Accessibility and Authenticity

Retail E-Commerce Leverages Mobile Payments to Accelerate Growth

PRODUCTS

Technology and Lifestyle Shifts Redefine Product Development

Smok and Bat Kenya Adapt Their Portfolios in Response to a Shifting Market

Portfolio Realignment and Compliance Costs Weigh on Margins but Open New Revenue Streams

OPERATING ENVIRONMENT

Legislation

Legislative Overview

Chart 9 - 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

ECONOMIC CONTEXT

Chart 10 - Economic Context for Nicotine

Chart 11 - Real GDP Growth 2020-2030

Chart 12 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 13 - Consumer Context for Nicotine

Chart 14 - Population 2020-2030

Chart 15 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Cigarettes in Kenya](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Cigarettes Summary

INDUSTRY PERFORMANCE

Regulatory Headwinds Suppress Growth Despite a Supportive Economy

Established Brands Struggle as Consumers Migrate to Informal Channels

Chart 16 - Volume Sales 2020-2030

WHAT'S NEXT?

Illicit Trade to Reshape Supply Channels as Legal Volumes Stagnate

Manufacturers to Diversify as Alternatives Grow in Appeal

Price Pressures and Shifting Demand to Alter Business Priorities

Chart 17 - Forecast Volume Sales 2020-2030

COMPETITIVE LANDSCAPE

Bat Kenya Consolidates Leadership as Illicit Trade Accelerates Share Shifts

Chart 18 - Company Shares 2025

Chart 19 - Brand Shares 2025

CHANNELS

Grocery Retailers Retain Smokers by Embedding into Daily Routines

Urban E-Commerce Attracts Digital Consumers to Alternatives, Not Cigarettes

Chart 20 - Retail Channels 2020-2025

TAXATION AND PRICING

Taxation Rates

Average Cigarette Pack Price Breakdown

Chart 21 - Cigarette Price Band Definitions

ECONOMIC CONTEXT

Chart 22 - Economic Context for Cigarettes

Chart 23 - Real GDP Growth 2020-2030

Chart 24 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 25 - Consumer Context for Cigarettes

Chart 26 - Population 2020-2030

Chart 27 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Cigars, Cigarillos and Smoking Tobacco in Kenya](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Cigars, Cigarillos and Smoking Tobacco Summary

INDUSTRY PERFORMANCE

Café Crème Leverages Affordability to Win Urban Smokers

Davidoff'S Branding Curtailed as Regulation Shifts Sales to Niche Outlets

Inflation and Tax Pressures Drive Smokers to Value Formats

Chart 28 - Volume Sales 2020-2030

Chart 29 - Volume Sales by Category 2025

WHAT'S NEXT?

Value-Driven Smokers to Embrace Kiosks as Cigarillos Expand Reach

Urban Youth to Drive Format Mixing as Premium Sales Shift to Lounges

Chart 30 - Forecast Volume Sales 2020-2030

Chart 31 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Smoke Shop Africa Ltd Sustains Leadership as Rivals Remain Distant

Chart 32 - Company Shares 2025

Chart 33 - Brand Shares 2025

CHANNELS

Kiosks and Stalls Capture Price-Driven Smokers with Flexible Sales

Social Media and Smartphones Fuel E-Commerce Discovery

ECONOMIC CONTEXT

Chart 34 - Economic Context for Cigars, Cigarillos and Smoking Tobacco

Chart 35 - Real GDP Growth 2020-2030

Chart 36 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 37 - Consumer Context for Cigars, Cigarillos and Smoking Tobacco

Chart 38 - Population 2020-2030

Chart 39 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Smokeless Tobacco, E-Vapour Products and Heated Tobacco in Kenya](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Smokeless Tobacco, E-Vapour Products and Heated Tobacco Summary

INDUSTRY PERFORMANCE

Voopoo Captures Multi-Format Demand as Regulation Shifts Retail Access

Chart 40 - Volume Sales 2020-2030

Chart 41 - Volume Sales by Category 2025

WHAT'S NEXT?

Mobile Payments and Informal Networks to Reshape Nicotine Access and Loyalty

Chart 42 - Forecast Volume Sales 2020-2030

Chart 43 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Janjar Vapes Kenya Leverages Digital Community to Maintain Strong Presence

CHANNELS

Social Platforms and Mobile Payments Drive E-Commerce Convenience

ECONOMIC CONTEXT

Chart 44 - Economic Context for Smokeless Tobacco, E-Vapour Products and Heated Tobacco

Chart 45 - Real GDP Growth 2020-2030

Chart 46 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 47 - Consumer Context for Smokeless Tobacco, E-Vapour Products and Heated Tobacco

Chart 48 - Population 2020-2030

Chart 49 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

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/nicotine-in-kenya/report.