

FMCG Insights: What Kenyans Buy, Why They Buy It, And Where

By Frankline Kibuacha

Walk into any supermarket in Nairobi on a Saturday morning or Sunday afternoon, and you can almost feel the rhythm of Kenyan consumer life. Trolleys rattle down the aisles, weighed down by, mostly, household items - fast-moving consumer goods (FMCG) products. Some milk, yoghurt, detergent, biscuits, sanitary towels, bottled water, and other beverages of choice, and many more. Beneath the mundane surface of this routine lies a complex web of decision-making that determines what ends up in that basket.

But if you have spent any time in retail, distribution, or consumer marketing, you will know that FMCG is where the real action is. It's where brand loyalty is tested, preferences shift with speed, and seemingly minor details like scent, texture, or shelf placement can make or break a product.

Depending on who you ask, FMCG purchasing is either an art or a science. (If you ask me, it is both.) Some brand managers swear by intuition, experience, and market hustle. Others, increasingly, lean on data, behavioral science, and predictive models. The truth lies somewhere in between: gut feel still matters, but it must be guided by insight.

Consumers are more empowered, more discerning, and more exposed to global trends than ever, and data has become not just helpful but essential. It tells us what Kenyan consumers are buying, why they buy it, where they buy it, and what might cause them to stop. Behind every transaction is a story, and behind every story is a signal - a clue for marketers trying to stay ahead of the curve.

This makes consumer research a critical tool, especially in the FMCG sector. Trends in this space reflect shopping habits, but they also point to economic realities, cultural shifts, gender roles, digital penetration, and brand trust. When analyzed well, they can point to emerging needs, untapped markets, and strategic blind spots.

So, what can we learn from Kenya's FMCG landscape today?

In my article on this issue, I will use my front-seat view of the research world and provide you with research insights from a study GeoPoll recently conducted, peppering in insights from other reports, that, hopefully, will be valuable to you - a playbook of sorts.

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Why Kenyans Buy What They Buy - Drivers of FMCG Purchase Decisions

One of the fundamental questions a marketer or product owner asks themselves is - why do consumers choose brand X over Y? The answer to this question then informs the strategic positioning of the product/brand to be the one chosen over competing brands.

From this study, Kenyan consumers are sending a clear and resounding message across FMCG categories: quality matters most. In eight out of nine surveyed categories, quality was identified as the top reason behind purchase decisions, beating out price, brand reputation, packaging, and convenience.

Let that sink in. This is a market where economic pressures are very real, and price sensitivity is often assumed. Yet Kenyans are saying: Give us products that work, and we'll keep buying them. From yoghurt (65%) to fresh produce (51%),

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In 2025, *M-Pesa*, *Dangote*, *MTN*, *Ethiopian Airlines* and *Brand South Africa* were inducted into the inaugural *Brand Africa | Hall of Fame* in recognition of their sustained and transformational impact in society and consistent rankings among the most admired brands in Africa in the past 15 years.

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snacks (44%), and personal care products (48%), quality consistently took the top spot. Even in traditionally price-driven segments like household cleaning items, it was clear that consumers were more interested in performance than in saving a few shillings.

This isn't to say price doesn't matter. The more I think about this finding, the more I also believe that quality preference is an indirect callout for price. Because I cannot afford to keep buying a cheaper bathing soap that finishes faster, why not spend a bit more and ultimately use less? What is emerging is a deeper appreciation for value, not just low cost. Consumers are looking at longevity, safety, effectiveness, and the overall satisfaction that a product delivers. They're willing to trade brand prestige or even convenience if the quality delivers.

There is the almost philosophical question - what is this quality? What do consumers mean when they speak about quality? As part of the study, we asked our respondents to record a video answering the question "What does quality mean to you?" Very interesting answers came through, and what stood out for me was "for me, quality means that the product can deliver its promise, which is why I bought it in the first place, and value for my money."

What's also notable is how brand recognition fared: much lower. This tells us that while strong brand equity is helpful, consumers are increasingly brand-agnostic as long as the product meets their expectations. This is both a challenge and an opportunity - for newer brands to break in, and for established ones to avoid resting on their laurels. Is this probably a call for stronger brands to start associating their brands with quality, so that their brands push the quality preference?

This pattern is even more pronounced in categories tied closely to health and family, like bottled water, baby products, toothpaste, or sanitary towels. In these spaces, quality isn't just about performance; it's about trust. And if you read my previous articles in this magazine, trust is hard-earned, but quickly lost.

The takeaway: Quality should not be the domain of premium brands alone. It must be integrated into your messaging, packaging, and performance. Back up claims with evidence and consumer proof points. In Kenya, the days of pushing sub-par products into price-sensitive segments are over.

Where Kenyans Buy What They Buy - The Retail Landscape

Another question a marketer asks themselves is - where are my consumers, and where do they buy? The answers to these seemingly simple questions have far-reaching implications. They influence product distribution, promotional strategy, packaging size, and even pricing models. It can be a make-or-break situation.

For every category in the study, GeoPoll asked the respondents where they most often bought. The standout finding is that formal retail has come of age in Kenya, with supermarkets emerging as the dominant purchase points across a majority of FMCG categories.

But why this preference for supermarkets? One reason could be perception: supermarkets offer the promise of quality, hygiene, and brand variety. Another is convenience; everything is under one roof, with discounts and loyalty programs adding to the appeal. Observing the way the supermarket space has changed in recent years, the big retailers have continually positioned themselves as destinations, not just outlets, and it seems to work. There is also the fact that now, there is a supermarket almost on every corner. A friend called it "an outbreak of Supermarket A and B."

Yet, informal retail continues to be the heartbeat of the Kenyan FMCG market, especially outside major towns. In the case of fresh produce, nearly a third of purchases are made in open-air markets or kiosks, places consumers associate with freshness, proximity, and flexibility. The 'kadogo economy' thrives here - where shoppers can buy cooking oil in a sachet, sugar in a musokoto paper twist, or even get items on credit from the neighborhood duka.

Kiosks are often the closest and most trusted points of purchase. Meanwhile, street vendors and hawkers still play a crucial role in categories like snacks and fruit, particularly for on-the-go consumption. And for construction materials or bulk purchases like cooking gas and detergents, supply stores and wholesalers often win the day.

What's clear is that buying behavior is multi-layered and highly contextual. While supermarkets attract the middle and upper income groups in urban centers, informal retailers offer reach, flexibility, and cultural familiarity that can't be matched. Kiosks offer accessibility, personalized service, and the option to buy in smaller quantities or on credit, becoming the frontline of consumer access. And in areas with lower penetration of formal retail chains, open-air markets remain dominant for their affordability and flexibility.

Takeaway: Think omnichannel, but also think local. Your retail strategy must embrace both modern trade and traditional channels. Don't just ship product, support informal retailers with display materials, training, and community-level engagement.

What this Means for your Strategy - The Takeaways

As we've explored what drives Kenyan consumers and where they make their purchases, it's worth briefly returning to the question we only touched on: what exactly are they buying? The answer, unsurprisingly, is: it depends. But if you follow the threads of quality and convenience through the research, you'll find an emerging hierarchy.

One category, many realities

The temptation in FMCG marketing is to treat all products as variations of the same problem: shelf placement, pricing, and maybe a celebrity endorsement. But GeoPoll's findings show that category-specific behavior is real and critical. For example, in snacks, quality leads (44%), price follows (25%), and brand ranks

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third (19%). But in packaged food, 36% of respondents don't buy it at all. Similarly, 42% of respondents don't consume alcohol, offering a glimpse into large but untapped (or culturally sensitive) markets.

So, there's no universal playbook. Deep category understanding is essential. Don't use a laundry detergent marketing strategy to sell yoghurt, and don't assume your product is part of everyone's lifestyle.

Loyalty lives, but it's fragile

There's a persistent belief that once consumers choose a brand, they stick with it. But the data shows that brand loyalty is heavily contingent on product consistency and value perception. Especially in segments like personal care, snacks, and soft drinks, consumers are open to switching. One slip-up, a drop in quality, a price jump, a distribution miss, and the consumer moves on.

Brand loyalty is no longer a birthright. Track your brand health continuously, not annually. Even if your share looks steady, the ground may be quietly shifting beneath your feet.

Untapped markets are where the real growth lives

There's something marketers should not overlook: non-consumption. It's a bit of a glass-half-empty, half-full scenario. In a mature category like snacks or household care, your fight is over market share. But when 36% of consumers don't buy packaged food, that's not just a gap, it's potential. Is it the price? Distribution? Perceived relevance? Packaging format? Success in these categories will come from investing in changing behavior.

Look beyond the obvious. Growth isn't always about taking share from a competitor - it's about creating new consumers through education, innovation, and localization.

So how do marketers convert all of this into action?

Start by aligning your value proposition with the Kenyan consumer's real priorities. Focus on quality in formulation and communication. Map your retail presence not just by volume, but by context - urban vs rural, formal vs informal, large pack vs small pack. Understand that brand recognition isn't enough; product performance earns loyalty.

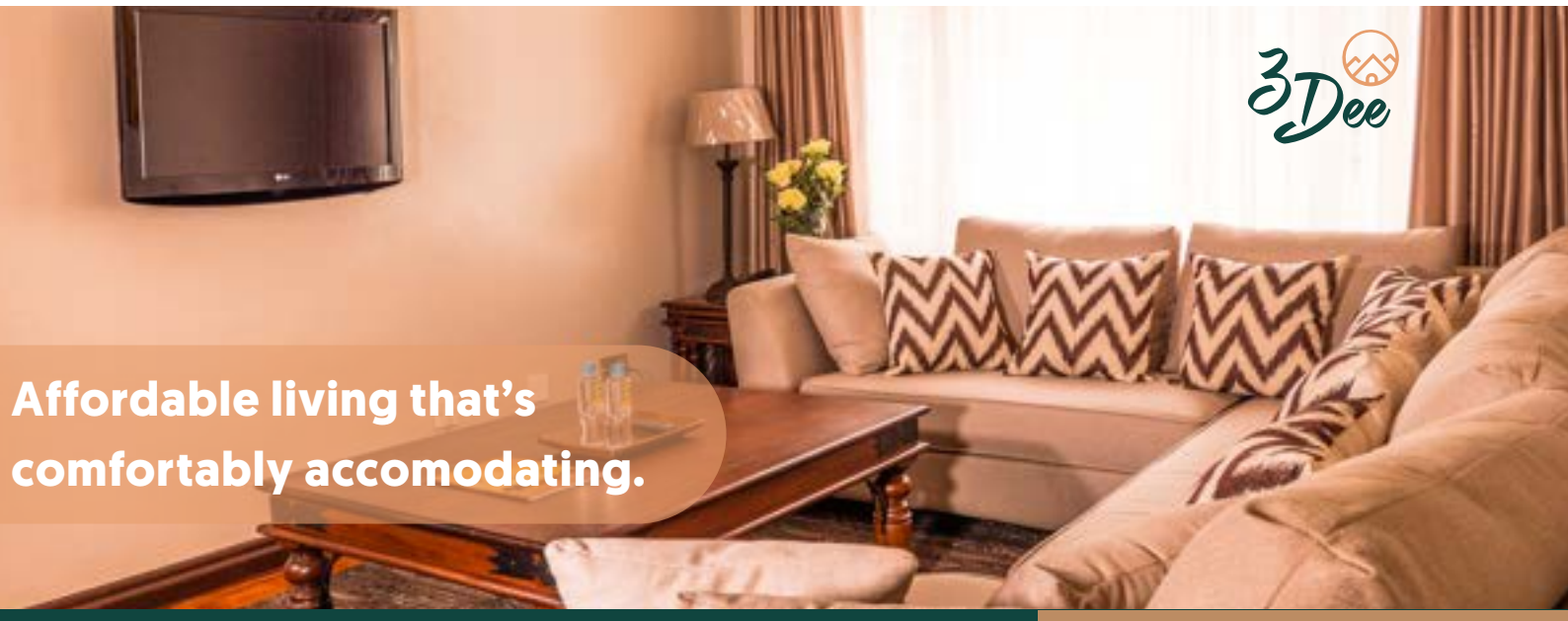
Use data not just to confirm what you already know but to challenge assumptions. If 30% of your category is being bought from kiosks, is your packaging designed to fit in that shelf? If consumers say they prioritize quality, is your product actually delivering on that promise, and how are you measuring that?

What's obvious is that Kenya's FMCG landscape is dynamic, layered, and full of opportunity. But those opportunities will only reward brands that are listening, learning, and willing to adapt.

Because at the end of the day, FMCG isn't just about fast movement on the shelf. It's about fast learning in the boardroom. And those who listen well win big.

Get the full report (conducted in Kenya, Nigeria and South Africa) on GeoPoll.com.

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