



Euromonitor
International

Soft Drinks in Nigeria

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Table of Contents

EXECUTIVE SUMMARY

Soft drinks stabilise as inflation moderates but affordability continues to define consumer behaviour

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Affordability pressures reshape consumption but functional needs continue to influence category preference

Manufacturers prioritise pack-size optimisation and distribution reach over high-risk innovation

Distribution-led competition intensifies as companies target underserved markets

WHAT'S NEXT?

Retail volume sales of soft drinks are set to rise over the forecast period

Improving macroeconomic stability will stimulate innovation and expand category breadth

Digitalisation will transform distribution efficiency and deepen reach into fragmented retail

COMPETITIVE LANDSCAPE

Coca-Cola Nigeria remains the leading company in 2025 due to strong brand equity and widespread distribution

Regional value brands drive dynamism through aggressive pricing and expanded market reach

CHANNELS

Small local grocers remain the leading distribution channel for soft drinks in 2025

Supermarkets emerge as the most dynamic channel despite economic constraints

FOODSERVICE VS RETAIL SPLIT

MARKET DATA

Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 15 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025

Table 16 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025

Table 17 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025

Table 18 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025

Table 19 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 20 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 21 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 22 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 23 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 24 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 25 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 26 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 27 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030
Table 28 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030
Table 29 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030
Table 30 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030
Table 31 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030
Table 32 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030
Table 33 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030
Table 34 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030
Table 35 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030
Table 36 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

APPENDIX

Fountain sales in Nigeria

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

[Bottled Water in Nigeria](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Bottled water maintains strong growth as an essential good despite sustained price pressures

INDUSTRY PERFORMANCE

Retail volume sales of bottled water increase in 2025 as essentiality and climate needs override affordability constraints
Still purified bottled water is the most dynamic category as consumers prioritise basic daily hydration

WHAT'S NEXT?

Retail volume sales of bottled water are expected to rise over the forecast period overall
Innovation in niche, flavoured, and functional waters supports premium development
Sustainability and added health benefits become key differentiators for premium bottled water

COMPETITIVE LANDSCAPE

Nestlé Nigeria is the leading company in 2025 in bottled water
Seven-Up Bottling Co is the most dynamic company overall in 2025

CHANNELS

Small local grocers are the leading distribution channel within bottled water in 2025
Supermarkets are the most dynamic distribution channel in 2025, with e-commerce gradually expanding and on-trade lagging

CATEGORY DATA

Table 37 - Off-trade Sales of Bottled Water by Category: Volume 2020-2025
Table 38 - Off-trade Sales of Bottled Water by Category: Value 2020-2025
Table 39 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2020-2025
Table 40 - Off-trade Sales of Bottled Water by Category: % Value Growth 2020-2025
Table 41 - NBO Company Shares of Off-trade Bottled Water: % Volume 2021-2025
Table 42 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2022-2025
Table 43 - NBO Company Shares of Off-trade Bottled Water: % Value 2021-2025
Table 44 - LBN Brand Shares of Off-trade Bottled Water: % Value 2022-2025
Table 45 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2025-2030
Table 46 - Forecast Off-trade Sales of Bottled Water by Category: Value 2025-2030
Table 47 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2025-2030

Table 48 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Carbonates in Nigeria

KEY DATA FINDINGS

2025 DEVELOPMENTS

Affordability, competition, and energy-seeking behaviours underpin strong category momentum in 2025

INDUSTRY PERFORMANCE

Retail volume sales of carbonates increased in 2025

Cola carbonates is the most dynamic category in 2025

WHAT'S NEXT?

Retail volume sales of carbonates are expected to rise over the forecast period

New packaging formats, flavour development, and digitalised distribution will shape innovation

Sugar taxation and growing health awareness may reshape category dynamics

COMPETITIVE LANDSCAPE

Coca-Cola Nigeria is the leading company in 2025 in carbonates

Mamuda Beverages Nigeria Ltd was the most dynamic company overall in 2025

CHANNELS

Small local grocers were the leading distribution channel in carbonates in 2025

Supermarkets were the most dynamic distribution channel in 2025

CATEGORY DATA

Table 49 - Off-trade vs On-trade Sales of Carbonates: Volume 2020-2025

Table 50 - Off-trade vs On-trade Sales of Carbonates: Value 2020-2025

Table 51 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2020-2025

Table 52 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2020-2025

Table 53 - Off-trade Sales of Carbonates by Category: Volume 2020-2025

Table 54 - Off-trade Sales of Carbonates by Category: Value 2020-2025

Table 55 - Off-trade Sales of Carbonates by Category: % Volume Growth 2020-2025

Table 56 - Off-trade Sales of Carbonates by Category: % Value Growth 2020-2025

Table 57 - Total Sales of Carbonates by Fountain On-trade: Volume 2020-2025

Table 58 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2020-2025

Table 59 - NBO Company Shares of Off-trade Carbonates: % Volume 2021-2025

Table 60 - LBN Brand Shares of Off-trade Carbonates: % Volume 2022-2025

Table 61 - NBO Company Shares of Off-trade Carbonates: % Value 2021-2025

Table 62 - LBN Brand Shares of Off-trade Carbonates: % Value 2022-2025

Table 63 - Forecast Off-trade Sales of Carbonates by Category: Volume 2025-2030

Table 64 - Forecast Off-trade Sales of Carbonates by Category: Value 2025-2030

Table 65 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2025-2030

Table 66 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2025-2030

Table 67 - Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2025-2030

Table 68 - Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Concentrates in Nigeria

KEY DATA FINDINGS

2025 DEVELOPMENTS

Concentrates maintains a small but resilient role as an affordable alternative to juice

INDUSTRY PERFORMANCE

Retail volume sales of concentrates increase modestly in 2025 as affordability supports demand

Powder concentrates is the most dynamic category in 2025 thanks to low cost and portability

WHAT'S NEXT?

Retail volume sales of concentrates are expected to rise over the forecast period overall

Innovation, flavour diversification and higher quality concepts can unlock new demand

Health and wellness positioning strengthens the long-term relevance of concentrates

COMPETITIVE LANDSCAPE

FMCG Distribution Ltd is the leading company in 2025 in concentrates

Foster Clark Products Ltd is the most dynamic company overall in 2025

CHANNELS

Small local grocers are the leading distribution channel within concentrates in 2025

Supermarkets is the most dynamic distribution channel in 2025 as modern retail gains relevance

Concentrates Conversions

Summary 2 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

CATEGORY DATA

Table 69 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2020-2025

Table 70 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2020-2025

Table 71 - Off-trade Sales of Concentrates by Category: Value 2020-2025

Table 72 - Off-trade Sales of Concentrates by Category: % Value Growth 2020-2025

Table 73 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2022-2025

Table 74 - NBO Company Shares of Off-trade Concentrates: % Value 2021-2025

Table 75 - LBN Brand Shares of Off-trade Concentrates: % Value 2022-2025

Table 76 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2025

Table 77 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2022-2025

Table 78 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2025

Table 79 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2022-2025

Table 80 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2025-2030

Table 81 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2025-2030

Table 82 - Forecast Off-trade Sales of Concentrates by Category: Value 2025-2030

Table 83 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Juice in Nigeria](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Juice stabilises in 2025 as consumers adapt to high prices and prioritise occasional, affordable consumption

INDUSTRY PERFORMANCE

Retail volume sales of juice increase in 2025 as consumers downtrade to smaller packs and more affordable brands

Juice drinks are the most dynamic category in 2025 as the most affordable, child-focused option

WHAT'S NEXT?

Retail volume sales of juice are expected to rise over the forecast period as incomes recover and the child population expands

Local sourcing, new formats, and niche segments shape innovation and technological progress

Health and wellness trends encourage premium, locally sourced juice propositions

COMPETITIVE LANDSCAPE

CHI Ltd is the leading company in 2025 in juice

Coca-Cola Nigeria is the most dynamic company overall in 2025

CHANNELS

Small local grocers are the leading distribution channel within juice in 2025

Supermarkets are the most dynamic distribution channel in 2025, supported by e-commerce and growing out-of-home occasions

CATEGORY DATA

Table 84 - Off-trade Sales of Juice by Category: Volume 2020-2025

Table 85 - Off-trade Sales of Juice by Category: Value 2020-2025

Table 86 - Off-trade Sales of Juice by Category: % Volume Growth 2020-2025

Table 87 - Off-trade Sales of Juice by Category: % Value Growth 2020-2025

Table 88 - NBO Company Shares of Off-trade Juice: % Volume 2021-2025

Table 89 - LBN Brand Shares of Off-trade Juice: % Volume 2022-2025

Table 90 - NBO Company Shares of Off-trade Juice: % Value 2021-2025

Table 91 - LBN Brand Shares of Off-trade Juice: % Value 2022-2025

Table 92 - Forecast Off-trade Sales of Juice by Category: Volume 2025-2030

Table 93 - Forecast Off-trade Sales of Juice by Category: Value 2025-2030

Table 94 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2025-2030

Table 95 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[RTD Coffee in Nigeria](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Rising interest in convenient, energy-boosting beverages drives strong growth despite economic pressures

INDUSTRY PERFORMANCE

A developing coffee culture and preference for creamy formats underpin strong volume growth

Lack of segmentation keeps 3-in-1 creamy RTD coffee dominant as innovation remains limited

WHAT'S NEXT?

Modern lifestyles, rising coffee awareness and demand for convenient energy support strong forecast growth

Innovation centred on flavour variety, café-style formats and functional ingredients will broaden appeal

Health-oriented positioning offers opportunity as consumers seek alternatives to sugary drinks

COMPETITIVE LANDSCAPE

Nestlé Nigeria maintains overwhelming leadership through brand equity, distribution strength and alignment with local taste preferences

Minimal competitive activity leaves Nestlé as the sole meaningful contributor to category expansion

CHANNELS

Supermarkets dominate distribution as early adopters gravitate toward modern retail environments

Independent small grocers increase share as product awareness grows and convenience becomes more critical

CATEGORY DATA

Table 96 - Off-trade Sales of RTD Coffee: Volume 2020-2025

Table 97 - Off-trade Sales of RTD Coffee: Value 2020-2025

Table 98 - Off-trade Sales of RTD Coffee: % Volume Growth 2020-2025

Table 99 - Off-trade Sales of RTD Coffee: % Value Growth 2020-2025

Table 100 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2021-2025

Table 101 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2022-2025

Table 102 - NBO Company Shares of Off-trade RTD Coffee: % Value 2021-2025

Table 103 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2022-2025

Table 104 - Forecast Off-trade Sales of RTD Coffee: Volume 2025-2030

Table 105 - Forecast Off-trade Sales of RTD Coffee: Value 2025-2030

Table 106 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2025-2030

Table 107 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

RTD Tea in Nigeria

KEY DATA FINDINGS

2025 DEVELOPMENTS

RTD tea faces another difficult year as economic pressures limit discretionary purchases

INDUSTRY PERFORMANCE

Weak consumer purchasing power shifts demand toward categories perceived to offer stronger functional value than RTD tea

Absence of reduced-sugar options reinforces the dominance of sweet, flavoured RTD tea aimed at younger consumers

WHAT'S NEXT?

Growing interest in healthier, novel beverages positions RTD tea for gradual recovery as economic conditions improve

Innovation centred on flavour diversification, functional benefits and carbonation is set to stimulate category visibility

Strengthening the health and natural positioning will be essential as consumers seek alternatives to sugary beverages

COMPETITIVE LANDSCAPE

Chi Ltd maintains leadership through strong brand recognition, product extensions and widespread distribution

Cway Food & Beverages expands rapidly through PET-based innovation and refreshed product launches

CHANNELS

Small local grocers retain dominance as affordability pressures keep consumers focused on convenient, low-cost purchasing points

Supermarkets gain momentum as modern retail expands and consumers seek variety and brand discovery

CATEGORY DATA

Table 108 - Off-trade Sales of RTD Tea by Category: Volume 2020-2025

Table 109 - Off-trade Sales of RTD Tea by Category: Value 2020-2025

Table 110 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2020-2025

Table 111 - Off-trade Sales of RTD Tea by Category: % Value Growth 2020-2025

Table 112 - Leading Flavours for Off-trade RTD Tea: % Volume 2020-2025

Table 113 - NBO Company Shares of Off-trade RTD Tea: % Volume 2021-2025

Table 114 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2022-2025

Table 115 - NBO Company Shares of Off-trade RTD Tea: % Value 2021-2025

Table 116 - LBN Brand Shares of Off-trade RTD Tea: % Value 2022-2025

Table 117 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2025-2030

Table 118 - Forecast Off-trade Sales of RTD Tea by Category: Value 2025-2030

Table 119 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2025-2030

Table 120 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Energy Drinks in Nigeria

KEY DATA FINDINGS

2025 DEVELOPMENTS

Energy drinks growth slows as health concerns rise but the category remains highly visible and competitive

INDUSTRY PERFORMANCE

Retail volume sales of energy drinks increase in 2025 but growth slows as consumers trade across categories

Regular energy drinks remains the key growth driver while affordable mass brands outperform premium offerings

WHAT'S NEXT?

Retail volume sales of energy drinks are expected to rise over the forecast period but face health and saturation headwinds

Flavour innovation, pack size segmentation and functional positioning support future category development

Health concerns, potential regulation and demand for 'natural' formulations shape future innovation

COMPETITIVE LANDSCAPE

FMCG Distribution Ltd is the leading company in 2025 in energy drinks through Lucozade

Rite Foods Ltd, Coca-Cola Nigeria and Mamuda Beverages Nigeria are among the most dynamic competitors in 2025

CHANNELS

Small local grocers are the leading distribution channel within energy drinks in 2025

Supermarkets is the most dynamic distribution channel in 2025 as modern retail and e-commerce gain relevance

CATEGORY DATA

Table 121 - Off-trade Sales of Energy Drinks: Volume 2020-2025

Table 122 - Off-trade Sales of Energy Drinks: Value 2020-2025

Table 123 - Off-trade Sales of Energy Drinks: % Volume Growth 2020-2025

Table 124 - Off-trade Sales of Energy Drinks: % Value Growth 2020-2025

Table 125 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2021-2025

Table 126 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2022-2025

Table 127 - NBO Company Shares of Off-trade Energy Drinks: % Value 2021-2025

Table 128 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2022-2025

Table 129 - Forecast Off-trade Sales of Energy Drinks: Volume 2025-2030

Table 130 - Forecast Off-trade Sales of Energy Drinks: Value 2025-2030

Table 131 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2025-2030

Table 132 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Sports Drinks in Nigeria](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sports drinks remains niche but gains visibility as exercise and wellness culture expand

INDUSTRY PERFORMANCE

Retail volume sales of sports drinks increase in 2025 but remain constrained by weak disposable income

Regular sports drinks is the most dynamic category as the market remains at an early stage of development

WHAT'S NEXT?

Retail volume sales of sports drinks are expected to rise over the forecast period overall

Product innovation and flavour diversification support category expansion among young, urban consumers

Health concerns and scrutiny of energy drinks support the positioning of sports drinks as a safer hydration option

COMPETITIVE LANDSCAPE

FMCG Distribution Ltd is the leading company in 2025 in sports drinks through Lucozade Sport

FMCG Distribution Ltd is also the most dynamic company overall in 2025 as Lucozade Sport leverages brand equity and value positioning

CHANNELS

Small local grocers are the leading distribution channel within sports drinks in 2025

Supermarkets are the most dynamic distribution channel in 2025 as modern retail gains traction

CATEGORY DATA

Table 133 - Off-trade Sales of Sports Drinks: Volume 2020-2025

Table 134 - Off-trade Sales of Sports Drinks: Value 2020-2025

Table 135 - Off-trade Sales of Sports Drinks: % Volume Growth 2020-2025

Table 136 - Off-trade Sales of Sports Drinks: % Value Growth 2020-2025

Table 137 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2021-2025

Table 138 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2022-2025

Table 139 - NBO Company Shares of Off-trade Sports Drinks: % Value 2021-2025

Table 140 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2022-2025

Table 141 - Forecast Off-trade Sales of Sports Drinks: Volume 2025-2030

Table 142 - Forecast Off-trade Sales of Sports Drinks: Value 2025-2030

Table 143 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2025-2030

Table 144 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2025-2030

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