



Soft Drinks in Nigeria

December 2025

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Soft Drinks in Nigeria

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

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INDUSTRY PERFORMANCE

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 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

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KEY DATA FINDINGS

2025 DEVELOPMENTS

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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

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CHANNELS

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Concentrates in Nigeria

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2025 DEVELOPMENTS

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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

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[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

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[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
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[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
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[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

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[Sports Drinks in Nigeria](#)

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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

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