



# Concentrates in Nigeria

December 2025

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## Concentrates in Nigeria - Category analysis

### 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

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## Soft Drinks in Nigeria - Industry Overview

### 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

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