



# RTD Coffee in Nigeria

December 2025

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## RTD Coffee in Nigeria - Category analysis

### 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

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

Supermarkets emerge as the most dynamic channel despite economic constraints

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