



Euromonitor
International

Hot Drinks in Nigeria

December 2025

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EXECUTIVE SUMMARY

Hot drinks navigate affordability pressures while essentiality and adaptability sustain demand

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Manufacturers prioritise affordability through smaller pack sizes and cost-saving mixes
Weak interest in premium wellness limits innovation and favours functional, affordable nutrition
Currency pressure constrains import-heavy categories while local tea and coffee players gain traction

WHAT'S NEXT?

Hot drinks set to benefit from population growth, economic improvement, and rising workplace consumption
Innovation and brand rejuvenation to accelerate as economic stability improves
Distribution expansion, digitalisation, and modern grocery growth will reshape market reach

COMPETITIVE LANDSCAPE

Nestlé Nigeria strengthens its leadership through brand equity, distribution depth, and accessible innovation
Promasidor Nigeria emerges as the most dynamic player through aggressive affordability and flavour variety
Local players gain visibility as imported niche segments stagnate and consumers explore domestic alternatives

CHANNELS

Small local grocers remain the leading distribution channel due to proximity and strong demand for small pack sizes
Supermarkets record the strongest dynamism as assortments expand and proximity improves
E-commerce experiences gradual adoption as consumers value convenience but still prefer physical shopping

FOODSERVICE VS RETAIL SPLIT

Foodservice remains a small but steadily evolving channel as café culture expands and premium experiences gain relevance
On-trade outperforms off-trade in 2025 as affluent consumers sustain demand amid economic pressures
Retail remains the dominant channel as affordability, convenience, and daily consumption habits steer purchasing behaviour

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Coffee in Nigeria

KEY DATA FINDINGS

2025 DEVELOPMENTS

Coffee faces sustained price pressures while affordability-oriented innovation supports demand

INDUSTRY PERFORMANCE

Retail value sales of coffee increased in 2025 as stabilising inflation supported modest recovery

Instant coffee mixes was the most dynamic category in 2025 due to increased sachet availability and value-driven positioning

WHAT'S NEXT?

Retail value sales of coffee are expected to rise over the forecast period as economic stability and rising incomes support adoption

Innovation in instant mixes and flavour diversification will drive future growth opportunities

Health, wellness, and sustainability will play a niche but growing role in shaping consumer preferences

COMPETITIVE LANDSCAPE

Nestlé Nigeria Plc was the leading company in 2025 in coffee due to strong brand equity and extensive distribution

Primera Foods Nigeria Ltd was the most dynamic company overall in 2025 due to the rapid expansion of TopCafe

CHANNELS

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Tea in Nigeria

KEY DATA FINDINGS

2025 DEVELOPMENTS

Tea gains momentum as affordability, wellness appeal, and entrenched consumption habits support demand

INDUSTRY PERFORMANCE

Retail value sales of tea increased in 2025 as moderated inflation supported improved affordability

Black tea bags was the most dynamic category in 2025 due to its essential role and affordability

WHAT'S NEXT?

Retail value sales of tea are expected to rise over the forecast period as population growth and improved spending power lift demand

Innovation in flavours, formats, and instant tea will expand consumer engagement

Health-focused and natural formulations will strengthen appeal in a market shaped by wellness trends

COMPETITIVE LANDSCAPE

Lipton Teas & Infusions Plant Based Ltd was the leading company in 2025 in tea due to strong brand equity and national distribution

Richmond and Top Tea were the most dynamic companies overall in 2025 due to affordability and flavour-driven differentiation

CHANNELS

Small local grocers was the leading distribution channel within tea in 2025 due to sachet popularity and neighbourhood convenience

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Other hot drinks stabilise as consumers adapt to high prices and seek affordable nutrition

INDUSTRY PERFORMANCE

Retail value sales of other hot drinks increase in 2025 as consumers adjust behaviour and shift to affordable formats

Chocolate-based flavoured powder drinks is the most dynamic category in 2025 as affordability and novelty attract consumers

WHAT'S NEXT?

Retail value sales of other hot drinks are expected to rise as population growth and economic stabilisation support demand

Innovation will focus on combination products, flavour expansion, and increased use of local cocoa sourcing

Nutrition-focused propositions will strengthen as health-conscious consumers seek added-value benefits

COMPETITIVE LANDSCAPE

Nestlé Nigeria Plc leads other hot drinks in 2025 due to Milo's strong brand equity, visibility and distribution reach

Promasidor Nigeria Ltd is the most dynamic company in 2025 as Twisco expands rapidly across price-sensitive households

CHANNELS

Small local grocers remain the leading distribution channel due to accessibility and sachet-focused purchasing habits

Supermarkets are the most dynamic channel in 2025 as expanding chains improve access, range, and affordability

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