



Coffee in Nigeria

December 2025

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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

Small local grocers was the leading distribution channel within coffee in 2025 due to affordability and widespread access
Supermarkets was the most dynamic distribution channel in 2025 as expansion and assortment depth strengthened relevance

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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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