Staple Foods in Nigeria

January 2026

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Staple Foods in Nigeria

EXECUTIVE SUMMARY

Slower price increases push a rebound in demand

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Focus on essentials and affordability in a still tough economic situation
Bokku! emerges with a good quality, economy-based offer
Health concerns play a growing role in consumers’ purchasing decisions

WHAT’S NEXT?

Improving economic conditions to boost the demand for staple foods
Strong company activity to develop and grow staple foods in Nigeria
Ongoing gradual shift to modern retail channels

COMPETITIVE LANDSCAPE

Local companies dominate the competitive landscape
Local companies invest to make gains

CHANNELS

Small local grocers dominate despite increasing competition from modern retail formats
Foodservice benefits from easing inflation and a consistent customer base

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Baked Goods in Nigeria

KEY DATA FINDINGS

2025 DEVELOPMENTS

Retail volume sales rebound as prices see some stabilisation

INDUSTRY PERFORMANCE

Bread enjoys price, versatility and convenience advantages
Manufacturers try to limit prices of pastries but compromise on quality

WHAT'S NEXT?

Cakes and dessert mixes to help baked goods expand as a category in Nigeria

Convenience and variety to stimulate the demand for packaged products

Room for the growth of modern grocery retailers

COMPETITIVE LANDSCAPE

Acquisition of the leading branded player

Private label and small brands increase the competition in baked goods

CHANNELS

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Breakfast Cereals in Nigeria

KEY DATA FINDINGS

2025 DEVELOPMENTS

The demand for breakfast cereals rebounds but is subject to persistent pressures

INDUSTRY PERFORMANCE

The use of local ingredients makes "other" RTE cereals competitive

Children's breakfast cereals benefit from growing company activity

WHAT'S NEXT?

Improving economic conditions and company activity to boost the appeal and offer of breakfast cereals

Health and wellness to shape new product development

New packaging and product content and higher-quality options to pique the interest of consumers

COMPETITIVE LANDSCAPE

Golden Morn benefits from wide distribution and a developing offer

Flour Mills of Nigeria continues new product development to gain retail value share

CHANNELS

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Processed Fruit and Vegetables in Nigeria

KEY DATA FINDINGS

2025 DEVELOPMENTS

Demand remains sluggish amid signs of recovery

INDUSTRY PERFORMANCE

Shelf stable vegetables rebounds through small pack purchases and the at-home dining trend
Players tailor strategies to appeal to different consumer groups

WHAT'S NEXT?

Economic recovery to drive the demand for processed fruit and vegetables
Healthier eating and convenience trends to shape new product development
Improved distribution to push frozen processed vegetables and potatoes

COMPETITIVE LANDSCAPE

Farrows consolidates its leadership through a strong offer of shelf stable vegetables
Sun Mark gains through widening distribution and low prices

CHANNELS

Small local grocers modernise stores and assortments
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Processed Meat, Seafood and Alternatives To Meat in Nigeria

KEY DATA FINDINGS

2025 DEVELOPMENTS

Weak consumer spending power dampens the demand for non-essential products

INDUSTRY PERFORMANCE

Products become occasional consumption items in a tough economic situation

Shelf stable seafood and frozen processed poultry benefit from lower prices

WHAT'S NEXT?

Rebound in consumption anticipated as the economy recovers

Healthier options and alternatives to gain traction

The competitive and distribution landscapes are set to see changes

COMPETITIVE LANDSCAPE

Titus leads with strong reach and brand equity as the competition intensifies

Local players make gains with lower prices and strong availability

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Rice, Pasta and Noodles in Nigeria

KEY DATA FINDINGS

2025 DEVELOPMENTS

Slower unit price increases boost retail volume sales

INDUSTRY PERFORMANCE

More essential perception supports interest in packaged products

Pasta exploits room for development and growth

WHAT'S NEXT?

Packaged rice and pasta retain the scope to capture more consumers

Players to partner with innovative complements to boost the profile and appeal of their products

Push to strengthen the distribution of packaged rice

COMPETITIVE LANDSCAPE

Dufil Prima Foods leads with a strong noodles and pasta portfolio
BUA Foods leverages competitive prices and strong production capacity to perform well

CHANNELS

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Supermarkets offer wide assortments and convenience

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