MEDIOLOGY NIGERIA

STRATEGIC MARKET INTELLIGENCE · ANALYSIS SERIES

Hot Beverage Drinks Market Analysis — Nigeria

A comprehensive state and regional evaluation of Coffee, Tea and Cocoa Beverages — market prioritization, Category Development Index metrics and strategic directions across Nigeria's 36 states and the FCT.

254.5M
HOT BEVERAGE CONSUMERS

116.9M
COCOA CONSUMERS · 52.5%

92.6M
TEA CONSUMERS · 41.6%

45.0M
COFFEE CONSUMERS · 20.2%

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01 · EXECUTIVE SUMMARY

Cocoa owns the cup; coffee owns the upside

This analysis examines the hot beverage landscape across Nigeria's 36 states and the Federal Capital Territory, combining macro-economic indicators into a market prioritization framework, Category Development Index (CDI) metrics, and strategic directions for the **Coffee**, **Tea** and **Cocoa Beverage** categories.

254.5M
Total hot beverage consumers across the three categories

222.6M
Total national population — the full addressable base

44.5
South West MAI — the most attractive regional market

Cocoa dominates

116.9M consumers (52.5%) — the largest category opportunity, with universal family appeal and mass-market reach.

Tea holds strong

92.6M consumers (41.6%) — consistent across regions, culturally anchored in the North.

Coffee is the growth lane

45.0M consumers (20.2%) — concentrated in urban, economically advanced states; premium upside.

Where to play first

The **South West** leads market attractiveness — Lagos, Ogun and Oyo are Priority 1 across all categories. The **North West** offers volume through Kano and Kaduna despite lower per-capita metrics.

Priority 1 — Invest & Grow

Coffee: Lagos, Ogun, Oyo, Delta · Tea: Lagos, Oyo, Kano, Delta · Cocoa: Ogun, Oyo, Delta. These markets pair high attractiveness (MAI ≥ 40) with above-average category development (CDI ≥ 100) — warranting aggressive investment in distribution, marketing and product innovation.

02 · MARKET OVERVIEW

One in two Nigerians drinks cocoa; one in five drinks coffee

With over 222 million potential consumers across three categories, the Nigerian hot beverage market shows distinct regional preferences shaped by economic, cultural and demographic factors.

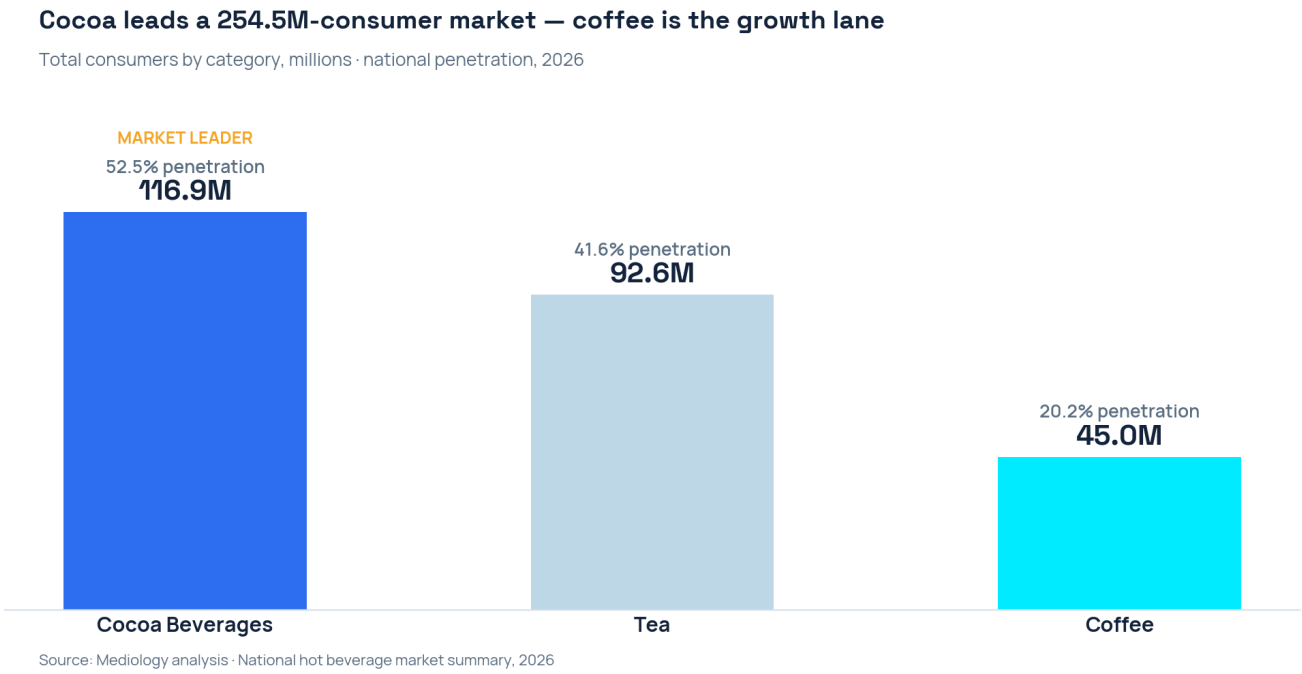


Figure 1 · Total consumers by category and national penetration, 2026

TABLE 1 · NATIONAL HOT BEVERAGE MARKET SUMMARY

CATEGORY	TOTAL CONSUMERS	NATIONAL PENETRATION	MARKET POSITION
Cocoa Beverages	116,950,172	52.5%	Market leader
Tea	92,570,719	41.6%	Strong challenger
Coffee	45,037,450	20.2%	Niche / growing

Reading the map

Penetration varies sharply by region: the **South West leads coffee (24.8%) and cocoa (55.0%)** on the back of Lagos's economic weight, the **North East leads tea (45.3%)** on cultural preference — and the **South East trails on all three**, marking it as the growth frontier.

The North West pours the most cups; the South West pours the most value

Nigeria's six geopolitical regions present distinct market characteristics driven by population distribution, economic development and infrastructure — the foundation for prioritization and resource allocation.

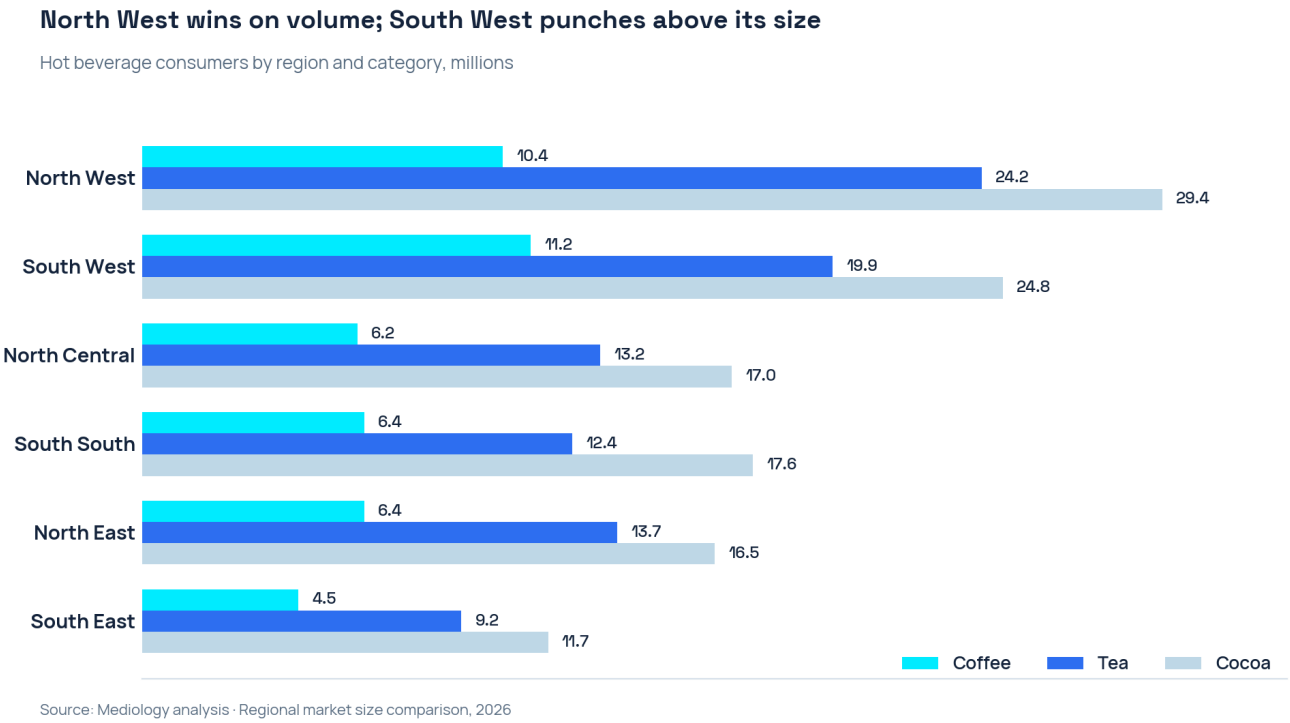


Figure 2 · Hot beverage market size by region, millions of consumers

TABLE 2 · REGIONAL MARKET SIZE COMPARISON

REGION	POPULATION	COFFEE (M)	TEA (M)	COCOA (M)	MAI SCORE
North West	56,300,000	10.4	24.2	29.4	16.5
South West	45,000,000	11.2	19.9	24.8	44.5
North Central	33,300,000	6.2	13.2	17.0	23.6
South South	32,900,000	6.4	12.4	17.6	34.3
North East	30,200,000	6.4	13.7	16.5	8.4
South East	24,900,000	4.5	9.2	11.7	28.8

03 · REGIONAL ANALYSIS

Cocoa takes nearly half the throat in every region

Share of throat reveals the competitive structure inside each region: cocoa leads everywhere, tea holds a stable second, and coffee's share rises meaningfully only in the South West.

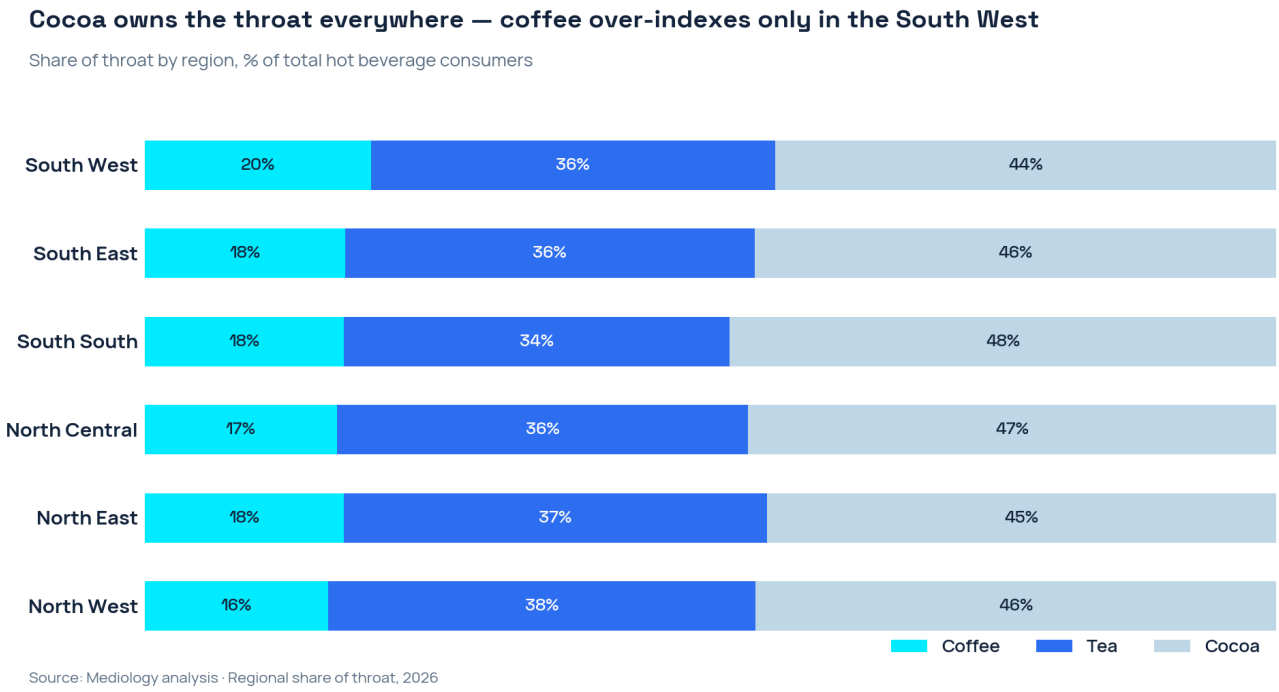


Figure 3 · Share of throat by region, % of total hot beverage consumers

TABLE 3 · REGIONAL SHARE OF THROAT (%)

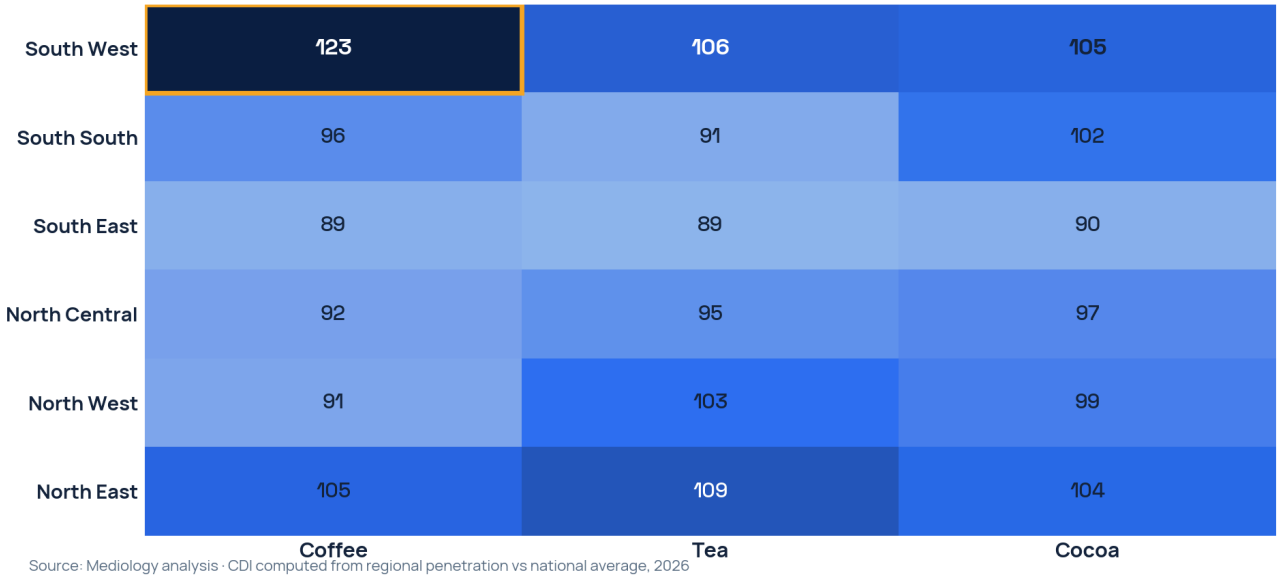
REGION	COFFEE SOT	TEA SOT	COCOA SOT	KEY INSIGHT
North Central	17.0%	36.3%	46.7%	Balanced portfolio opportunity
North East	17.6%	37.4%	45.0%	Tea-strong region
North West	16.2%	37.8%	46.0%	Volume-focused market
South East	17.7%	36.2%	46.1%	Undeveloped potential
South South	17.6%	34.1%	48.3%	Cocoa-dominant market
South West	20.0%	35.7%	44.3%	Coffee opportunity market

The development index maps exactly where each category is won

The Category Development Index measures penetration relative to the national average (CDI = 100). Above 100 signals developed demand; below 100 signals headroom.

South West is above par on every category — the South East is the open field

Category Development Index by region (100 = national average)



Source: Mediology analysis · CDI computed from regional penetration vs national average, 2026

Figure 4 · Category Development Index by region (100 = national average)

South West — developed

Above-average CDI on **all three categories** (123 coffee · 106 tea · 105 cocoa): mature demand, ready for premiumization.

North East — tea heartland

Tea CDI of **109**, the strongest in the North, reflecting deep cultural affinity for the category.

South South — cocoa edge

Highest cocoa share of throat at **48.3%**, with Delta leading the region's development.

South East — open field

Below 90 on every category — **undeveloped across the board**, the clearest long-term growth opportunity.

04 · MARKET PRIORITIZATION MATRIX

Lagos scores 100 — no other state clears 60

The Market Attractiveness Index combines six macro-economic indicators: middle-class population (25%), GDP per capita (20%), internet penetration (15%), banking access (15%), population size (15%) and real GDP growth (10%).

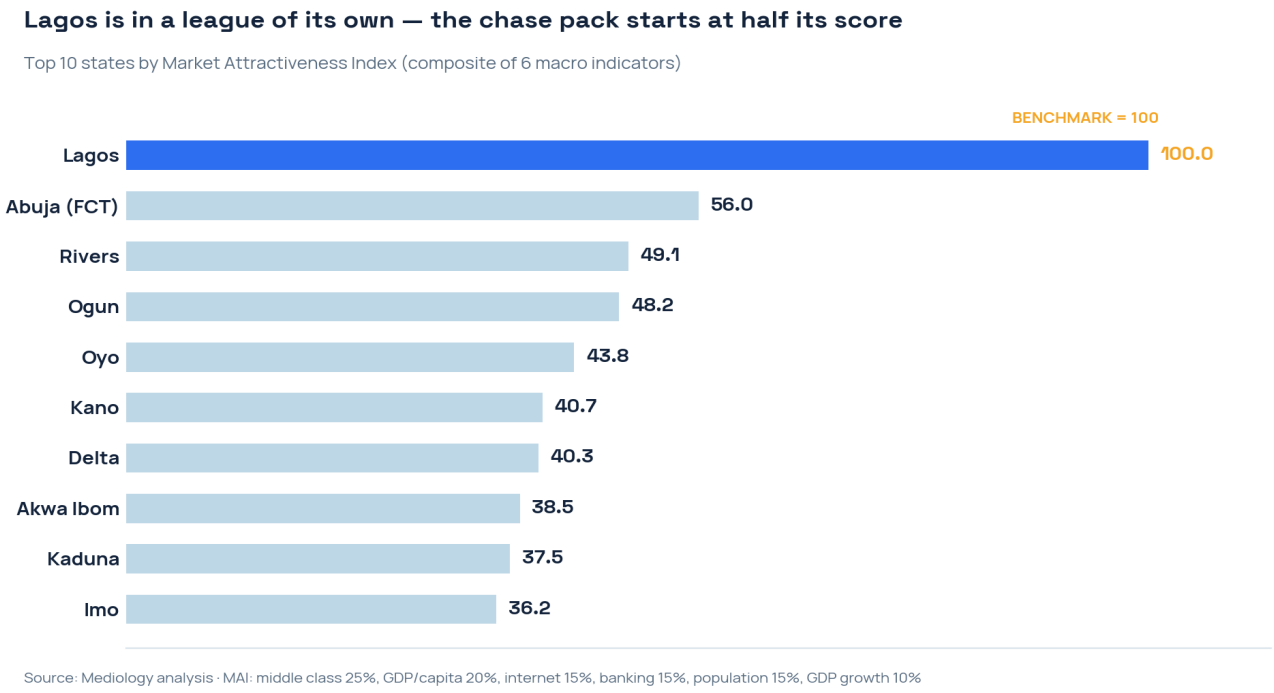


Figure 5 · Top 10 states by Market Attractiveness Index

TABLE 4 · TOP 10 STATES BY MARKET ATTRACTIVENESS INDEX

RANK	STATE	REGION	MAI SCORE	MIDDLE CLASS	GDP / CAPITA (₦)
1	**Lagos**	South West	100.0	7.9M	3,684,940
2	**Abuja (FCT)**	North Central	56.0	2.2M	2,518,812
3	**Rivers**	South South	49.1	3.5M	1,045,992
4	**Ogun**	South West	48.2	3.0M	740,795
5	**Oyo**	South West	43.8	3.2M	465,234
6	**Delta**	South South	40.3	2.6M	987,558
7	**Kano**	North West	40.7	4.2M	245,471
8	**Akwa Ibom**	South South	38.5	2.3M	1,277,961
9	**Kaduna**	North West	37.5	2.7M	492,009
10	**Imo**	South East	36.2	2.5M	1,201,878

04 · MARKET PRIORITIZATION MATRIX

MAI × CDI turns 37 markets into four clear plays

The priority classification pairs market attractiveness with category development to create actionable segments for each category.

Priority 1 · Invest & Grow

MAI ≥ 40 + CDI ≥ 100. Maximum investment — innovation hubs and brand-building platforms.

Priority 2 · Build & Develop

MAI ≥ 30 + CDI ≥ 90. Targeted investment to accelerate category development.

Priority 3 · Maintain & Optimize

MAI ≥ 20 + CDI ≥ 80. Efficient coverage; optimize the existing footprint.

Priority 4 · Monitor & Evaluate

All other markets. Watch development indicators; re-enter as conditions improve.

TABLE 5 · PRIORITY DISTRIBUTION BY CATEGORY (NUMBER OF STATES)

CATEGORY	PRIORITY 1	PRIORITY 2	PRIORITY 3	PRIORITY 4
Coffee	4 states	3 states	6 states	24 states
Tea	4 states	4 states	8 states	21 states
Cocoa	3 states	6 states	7 states	21 states

What the spread means

Only **3–4 states per category** earn full investment — focus is the strategy. The broad Priority 4 tail (21–24 states) confirms that hot beverage growth in Nigeria is a targeted game, not a blanket one.

Coffee follows the money: premium, urban, young

45 million consumers and 20.2% penetration make coffee the premium growth play. Consumption tracks economic indicators — highest where GDP per capita and middle-class populations are elevated.

Urban concentration

Consumption clusters in **Lagos, Abuja and major South West cities**.

Income correlation

r = 0.72 between GDP per capita and coffee penetration.

Youth appeal

Higher-internet states show **elevated coffee CDI** — a digital-first audience.

Premium positioning

Banking access (r = 0.65) tracks category development — café culture and premium SKUs.

TABLE 6 · COFFEE MARKET — PRIORITY 1 STATES

STATE	REGION	CONSUMERS	CDI	MAI	STRATEGIC FOCUS
Lagos	South West	4,129,651	123.7	100.0	Premium positioning, innovation hub
Ogun	South West	1,495,926	117.4	48.2	Distribution expansion, trade hub
Oyo	South West	1,642,636	100.2	43.8	Urban penetration, Ibadan focus
Delta	South South	1,459,299	116.3	40.3	Warri market development

Coffee play

Win the professional class where it lives and works: premium SKUs and café partnerships in Lagos, distribution muscle in Ogun and Oyo, and a South South anchor in Delta's Warri market.

05 · CATEGORY DEEP DIVE — TEA

Tea is the steady hand: cultural in the North, wellness in the South

Nigeria's second-largest category with 92.6 million consumers at 41.6% penetration. Tea's footprint is more uniform than coffee's — strong across regions and demographic segments.

Cultural integration

Deep presence across **Northern regions** — traditional consumption occasions.

Health positioning

Growing appeal among **health-conscious middle-class** consumers; green and herbal variants.

Value focus

Price-sensitive category — **efficient supply chain** is the margin engine.

Functional benefits

Energy and wellness positioning **resonates across segments**.

TABLE 7 · TEA MARKET — PRIORITY 1 STATES

STATE	REGION	CONSUMERS	CDI	MAI	STRATEGIC FOCUS
Lagos	South West	7,418,258	108.1	100.0	Premium variants, modern trade
Oyo	South West	3,845,442	114.2	43.8	Traditional market strength
Kano	North West	6,823,048	101.9	40.7	Northern hub, volume focus
Delta	South South	2,696,739	104.6	40.3	South South expansion

Tea play

Run a two-speed strategy: **premium and specialty** through Lagos modern trade; **volume and value packs** through Kano's northern hub and Oyo's traditional markets.

Cocoa is the family default — 117 million cups deep

The category leader at 116.9 million consumers and 52.5% penetration. Cultural affinity, family consumption occasions and availability across every retail channel power its dominance.

Universal appeal

Highest penetration across all demographic segments.

Family consumption

Strong household penetration with **multi-user occasions** — children's mornings drive purchase.

Price accessibility

Wide price-point range enables **true mass-market reach**.

Local advantage

Nigeria's **cocoa production heritage** supports authenticity and supply-chain efficiency.

TABLE 8 · COCOA BEVERAGE MARKET — PRIORITY 1 STATES

STATE	REGION	CONSUMERS	CDI	MAI	STRATEGIC FOCUS
Ogun	South West	3,360,983	101.5	48.2	Manufacturing proximity advantage
Oyo	South West	4,368,485	102.7	43.8	Volume leadership, distribution depth
Delta	South South	3,866,281	118.7	40.3	Regional anchor, trade partnerships

Cocoa play

Defend the leadership where it is strongest: anchor production and supply chain in **Ogun's manufacturing corridor**, drive volume in **Oyo**, and hold the South South through **Delta**.

Attractiveness meets development: four states earn the coffee spend

Plotting the top 10 coffee markets on CDI against MAI separates genuine investment cases from mere volume — the same lens applies to tea and cocoa prioritization.

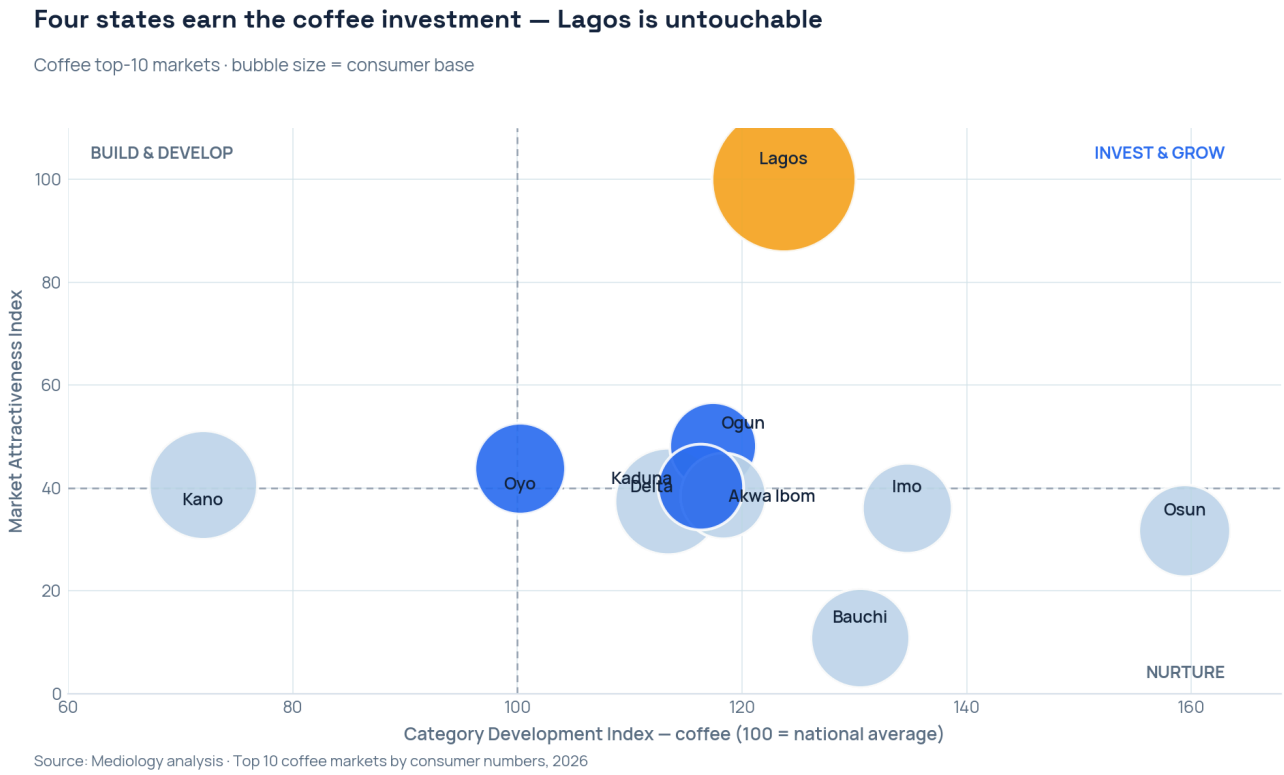


Figure 6 · Coffee top-10 markets — CDI × MAI, bubble size = consumer base

Beyond the quadrant lines

Osun (CDI 159) and **Bauchi (CDI 131)** show developed coffee demand without the economics to match — nurture them with distribution light-touch, and revisit as their MAI climbs. **Kano** is the reverse: attractive market, underdeveloped coffee culture — a build-and-develop brief.

06 · TOP 10 MARKETS BY CATEGORY

Lagos headlines all three leaderboards — the North fills the volume ranks

The top 10 markets per category, ranked by consumer numbers — the core of any national distribution strategy. CDI shown alongside to separate developed demand from raw volume.

Table 9 · Top 10 coffee markets

#	STATE	CONSUMERS	CDI
1	**Lagos**	4,129,651	123.7
2	**Kano**	2,344,605	72.0
3	**Kaduna**	2,247,783	113.4
4	**Bauchi**	1,954,192	130.5
5	**Osun**	1,677,158	159.4
6	**Oyo**	1,642,636	100.2
7	**Imo**	1,608,169	134.7
8	**Ogun**	1,495,926	117.4
9	**Akwa Ibom**	1,460,507	118.3
10	**Delta**	1,459,299	116.3

Table 10 · Top 10 tea markets

#	STATE	CONSUMERS	CDI
1	**Lagos**	7,418,258	108.1
2	**Kano**	6,823,048	101.9
3	**Kaduna**	4,414,533	108.3
4	**Katsina**	4,124,364	122.4
5	**Oyo**	3,845,442	114.2
6	**Bauchi**	3,787,843	123.1
7	**Jigawa**	3,060,987	108.2
8	**Rivers**	2,841,708	83.3
9	**Borno**	2,832,004	109.8
10	**Delta**	2,696,739	104.6

Table 11 · Top 10 cocoa markets

#	STATE	CONSUMERS	CDI
1	**Lagos**	8,546,516	98.6
2	**Kano**	6,513,472	77.0
3	**Kaduna**	5,507,361	107.0
4	**Katsina**	4,666,361	109.7
5	**Oyo**	4,368,485	102.7
6	**Bauchi**	4,204,704	108.2
7	**Rivers**	4,129,676	95.9
8	**Jigawa**	3,903,541	109.3
9	**Delta**	3,866,281	118.7
10	**Borno**	3,605,347	110.7

The pattern behind the tables

Lagos, Kano and Kaduna appear in the top three of every category — they are non-negotiable distribution anchors. Northern volume states (**Katsina, Bauchi, Jigawa, Borno**) carry developed tea and cocoa demand (CDI 108–123) at low MAI: serve them with value formats through traditional trade, not premium pushes.

Three categories, three different reasons to drink

The drivers behind each category point to different messages, channels and pack strategies.

Coffee — the professional ritual

Urbanization and modern retail pull coffee up; workplace culture (banking access r = 0.68) and premium experience-seeking sustain it. Lagos leads coffee CDI at 123.7 on 87.4% internet penetration.

Tea — wellness meets tradition

Health consciousness lifts green and herbal variants in middle-class states, while the North East holds the highest tea penetration (45.3%) on cultural continuity. Affordability keeps frequency high.

Cocoa — the family fuel

Nutritional positioning (energy, vitamins) wins family purchase decisions; children's morning occasions drive household volume. Local cocoa heritage reinforces authenticity.

TABLE 12 · MACRO-ECONOMIC CORRELATION WITH CATEGORY PENETRATION

MACRO INDICATOR	COFFEE	TEA	COCOA
GDP per capita	Strong (0.72)	Moderate (0.45)	Weak (0.28)
Internet penetration	Strong (0.68)	Moderate (0.42)	Weak (0.22)
Banking access	Strong (0.65)	Moderate (0.38)	Weak (0.18)
Middle-class population	Strong (0.70)	Moderate (0.48)	Moderate (0.35)
Population density	Moderate (0.52)	Moderate (0.55)	Strong (0.62)

Marketing implication

Coffee is a digital-first, premium message aimed at income. **Cocoa** is a mass-reach, family message aimed at density. **Tea** sits between — cultural media in the North, wellness media in the South.

Priority 1 playbooks: maximum force on few fronts

Priority 1 markets combine high attractiveness with above-average development — they warrant maximum investment as innovation hubs and brand-building platforms.

Table 13 · Coffee — Priority 1

STATE	FOCUS	INVEST
Lagos	Premium hub · café partnerships, premium SKUs, digital	Highest
Ogun	Distribution · trade hub, logistics optimization	High
Oyo	Urban penetration · Ibadan metro, modern trade	High
Delta	South South anchor · Warri development	Med-High

Table 14 · Tea — Priority 1

STATE	FOCUS	INVEST
Lagos	Premium & modern trade · specialty teas	Highest
Oyo	Traditional strength · open markets, value packs	High
Kano	Northern volume hub · cultural positioning	High
Delta	South South expansion · local partnerships	Med-High

Table 15 · Cocoa — Priority 1

STATE	FOCUS	INVEST
Ogun	Manufacturing proximity · supply chain hub	Highest
Oyo	Volume leadership · promotional intensity	High
Delta	South South anchor · trade partnerships	High

Priority 2 — Build & Develop

Coffee (3): Akwa Ibom, Imo, Kaduna — urban centres and professional segments. **Tea (4):** Akwa Ibom, Imo, Kaduna, Ogun — expand distribution, build awareness. **Cocoa (6):** Akwa Ibom, Edo, Imo, Kaduna, Lagos, Rivers — leverage existing infrastructure.

Budget follows attractiveness: 55% to the southern corridor

Regional strategies align resource allocation with each region's role in the portfolio.

TABLE 16 · REGIONAL STRATEGIC PRIORITIES

REGION	MAI SCORE	STRATEGIC PRIORITY	RESOURCE ALLOCATION
South West	44.5	Leadership & innovation	35% of budget
South South	34.3	Growth & expansion	20% of budget
South East	28.8	Market development	15% of budget
North Central	23.6	Selective investment	15% of budget
North West	16.5	Volume focus (Kano / Kaduna)	12% of budget
North East	8.4	Maintenance & monitoring	3% of budget

Regional hub model

Establish distribution and marketing hubs in Lagos (South West), Port Harcourt (South South) and Kano (North West) to optimize deployment — premium innovation flows from Lagos, volume coverage radiates from Kano.

09 · MACRO-ECONOMIC CONTEXT

A two-speed economy sets the beverage agenda

Macro indicators explain the market map: southern regions offer premium growth while northern regions offer volume at lower price points. Strategies must differ by design.

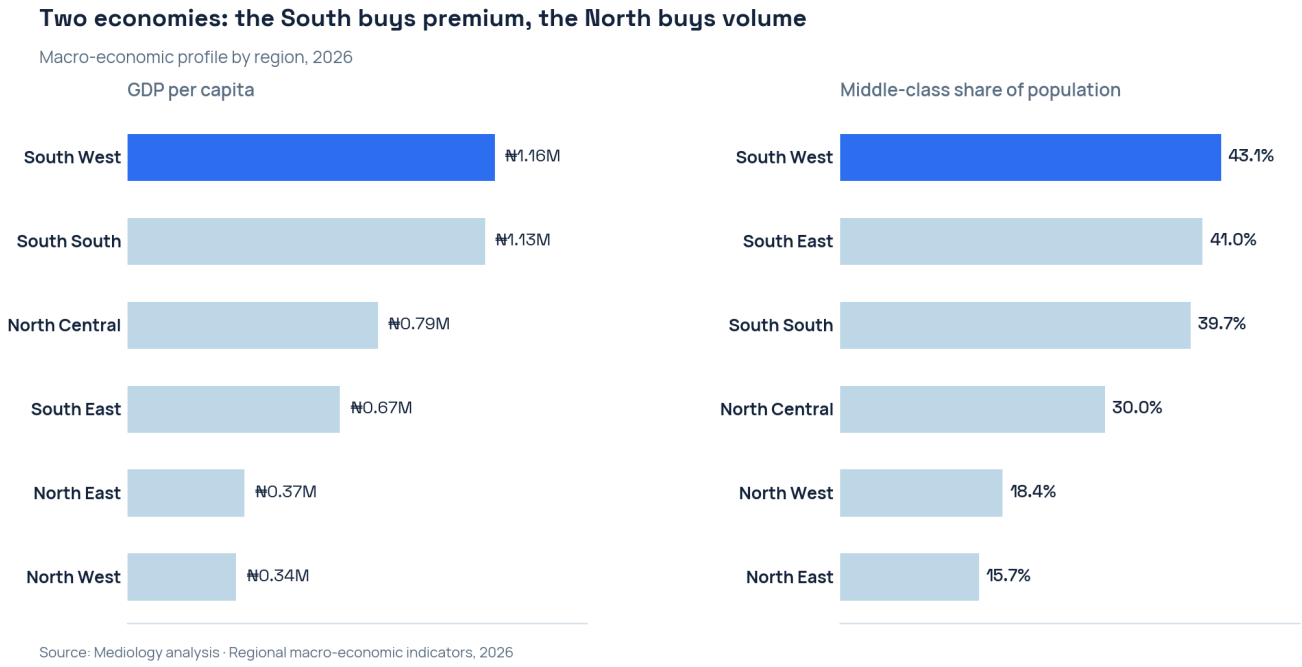


Figure 7 · GDP per capita and middle-class share by region, 2026

TABLE 17 · MACRO-ECONOMIC INDICATORS BY REGION

REGION	GDP / CAPITA (₦)	INTERNET	BANKING	UNEMPLOYMENT	GDP GROWTH	MIDDLE CLASS
South West	1,158,084	59.1%	73.8%	4.5%	3.9%	43.1%
South South	1,127,783	48.2%	69.4%	6.6%	3.7%	39.7%
South East	669,879	46.7%	67.9%	5.1%	3.4%	41.0%
North Central	789,586	47.4%	54.5%	5.5%	3.3%	30.0%
North West	341,838	34.2%	38.9%	6.8%	3.1%	18.4%
North East	368,496	29.1%	37.4%	7.3%	2.8%	15.7%

Digital divide

Internet penetration runs **29.1% → 59.1%** (North East → South West) — digital marketing and e-commerce play unevenly.

Financial inclusion gap

Banking access spans **37.4% → 73.8%** — shaping payment systems and premium accessibility.

Spending power

North East (7.3%) and North West (6.8%) unemployment **limits discretionary spend** on premium beverages.

09 · MACRO-ECONOMIC CONTEXT

Four economic tiers, four portfolio postures

Grouping states by economic profile converts macro data into portfolio decisions — differentiated products and pricing for a two-speed Nigeria.

TABLE 18 · ECONOMIC PROFILE BY MARKET TIER

TIER	STATES	ECONOMIC PROFILE	STRATEGIC APPROACH
Premium	Lagos, Abuja, Rivers	High GDP / capita, high banking access	Premium products, modern trade focus
Growth	Ogun, Oyo, Delta, Akwa Ibom	Moderate-high GDP, growing middle class	Mid-tier products, distribution expansion
Volume	Kano, Kaduna, Imo	Large population, lower GDP / capita	Value products, traditional trade
Emerging	Remaining states	Developing infrastructure	Selective presence, market development

The strategic read

The South West's leadership — **₦1.16M GDP per capita and a 43.1% middle class** — drives premium category growth, coffee above all. South West and South South lead GDP growth (3.7–3.9%), meaning purchasing power keeps expanding where the portfolio is already strongest.

Focus wins: concentrate where attractiveness and development meet

Across 254.5 million consumers, the market rewards disciplined focus: cocoa for reach, tea for resilience, coffee for premium growth — deployed state by state, not nationally by default.

7
Priority 1 markets across the three categories

13
Priority 2 markets to build and develop

21
Markets to monitor for future entry

Now · 0–6 months

Consolidate Priority 1: maximize distribution and promotional intensity in Lagos, Ogun, Oyo, Delta (all categories) and Kano (tea); prioritize Ogun manufacturing proximity for cocoa. Deploy category-specific plays and stand up the Lagos, Port Harcourt and Kano hubs.

Next · 6–18 months

Develop Priority 2: expand Kaduna, Akwa Ibom, Imo and Edo. Launch the innovation pipeline — premium coffee variants, specialty teas — from the Lagos hub outward.

Later · 18+ months

Open the frontier: invest in South East market development, build local supply-chain capability in Ogun's corridor, and optimize region-specific portfolios for the two-speed economy.

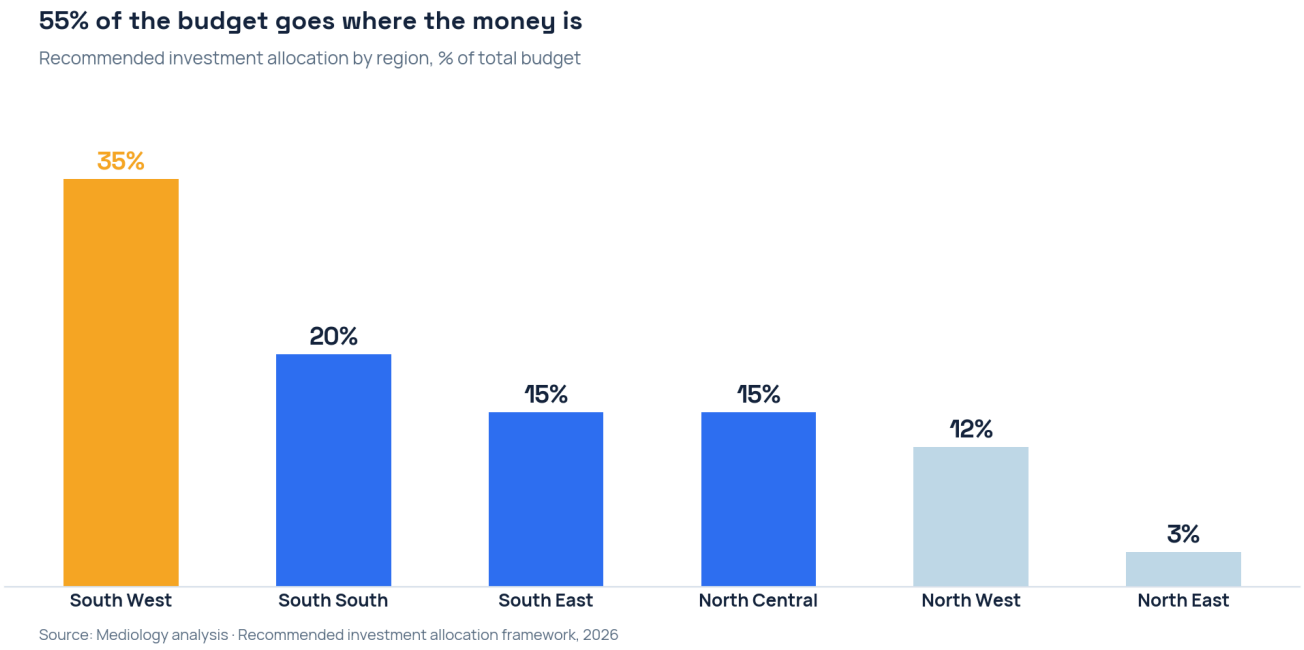


Figure 8 · Recommended investment allocation by region (Table 19)

Measure share, distribution and CDI — not just sales

Market share

Category share in Priority 1 markets — **target 25%+ within 24 months**.

Distribution

Weighted distribution in priority markets — **target 70%+ coverage**.

CDI growth

Category Development Index improvement across **Priority 2 markets**.

Revenue & margin

Year-on-year growth by region and category; **gross margin by market tier**.

TABLE 19 · RECOMMENDED INVESTMENT ALLOCATION BY REGION

REGION	ALLOCATION	FOCUS AREAS	EXPECTED ROI
South West	35%	Lagos premium, Ogun / Oyo volume	High
South South	20%	Delta anchor, Rivers expansion	High
South East	15%	Market development, Imo focus	Medium-High
North Central	15%	Abuja premium, selective expansion	Medium
North West	12%	Kano volume, Kaduna development	Medium
North East	3%	Maintenance, monitoring	Low-Medium

Final recommendation

Focus 55% of resources on the South West and South South — establishing Lagos as the innovation and brand-building hub while building volume leadership in Oyo, Ogun and Delta. Maintain selective presence in the North West through Kano and Kaduna for volume, and monitor the remaining regions for future expansion as their economics develop.

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PROFILE

Results-driven marketing communications strategist with over 15 years of experience in brand building, brand development and management. A trusted consultant to global and local brands including Samsung, Reliance HMO, Polo Swarovski, FBN Holdings, M-KOPA, Honda Nigeria, Daraju Industries and De Trans — delivering 360° marketing, communication strategies, media planning and buying, digital marketing, SEO, content strategy and marketing analytics.

EDUCATION

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CAREER HIGHLIGHTS

- Managing Consultant — Mediology Nigeria Ltd (2025–present)
- Director of Planning & Strategy — Solid Media Nigeria (2022–2025)
- Head, Media Planning & Strategy — HoiSales Nigeria (2020–2022)
- Head, Planning / Insight & Analytics — All Seasons Zenith (Publicis Groupe), Lagos (2014–2020)
- Senior Manager, Research / Planning & Innovation — All Seasons Zenith (Publicis), 2013–2014
- Manager, Data Analytics & Innovation — MediaCom (WPP), 2011–2013

MEMBERSHIPS & RECOGNITION

- Juror, Young Lions National Competition (Cannes Lions pathway) — 2024 & 2025
- Juror, Pitcher Awards — 2024
- Panelist, Social Media Week Lagos — 2019
- Fellow, Institute of Management Consultants of Nigeria (FIMC)
- Associate Member, Advertising Practitioners Council of Nigeria (APCON)
- Member, Chartered Institute of Marketing (CIM), UK

15+
YEARS IN MARKETING COMMUNICATIONS

WPP · Publicis
GLOBAL NETWORK EXPERIENCE

ALAT
LAUNCH TEAM — NIGERIA'S FIRST DIGITAL BANK

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