



Consumer Foodservice By Location in Nigeria

March 2026

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2025 DEVELOPMENTS

Non-standalone locations gain from tourism, urbanisation and convenience trends

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Lodging emerges as the most dynamic non-standalone location

Standalone outlets lose ground

Convenience-seeking consumers drive fulfilment through delivery services

WHAT'S NEXT?

Lodging expected to be the most dynamic non-standalone location

Standalone will face strong competition from other locations

Macroeconomic pressures and security risks may hinder performance in certain locations

Urbanisation and demographic shifts to support location-based growth

COMPETITIVE LANDSCAPE

Transcorp Hotels maintains robust presence in non-standalone locations

Chicken Republic retains strong position in standalone locations

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EXECUTIVE SUMMARY

Consumer foodservice is impacted by high inflation and weak purchasing power

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Inflation lifts value growth as consumers shift towards more affordable options

Third-party delivery partnerships accelerate fulfilment growth
Promotions and loyalty programmes strengthen customer retention

WHAT'S NEXT?

Foodservice faces real value contraction despite rising transaction volumes
Ongoing menu innovation set to stimulate demand
Renewable energy adoption will support cost-efficiency and operational resilience

COMPETITIVE LANDSCAPE

Food Concepts Ltd maintains leadership through popularity of chicken
Sundry Foods Ltd emerges as most dynamic player
Burger King accelerates national expansion with innovative drive-through format

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Chained operators expand footprint
Delivery app adoption expands as restaurants respond to rising demand for convenience

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