



Euromonitor
International

Staple Foods in Lebanon

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EXECUTIVE SUMMARY

Greater optimism in 2025 as signs of recovery begin to emerge

KEY FINDINGS

INDUSTRY PERFORMANCE

Recovery from the dramatic decline that began in 2019

Bifurcation of the market

Market continues to face challenges as any further escalation of the conflict could reverse the fragile gains of 2024-2025

Stark divergence between a resilient private sector and a decaying public sector

Stable periods punctuated by conflict-driven spikes

WHAT'S NEXT

Outlook defined by continued uncertainty

Period of stabilisation and cautious growth

Opportunity for local companies with more affordable and authentic products

Evolving distribution landscape with the rise of e-commerce

COMPETITIVE LANDSCAPE

Leading Chamsine Bakeries capitalises on the consumer shift towards local products

Leading Chamsine Bakeries capitalises on the consumer shift towards local products

CHANNELS

Hypermarkets lead, offering a wider product range

Food, drink, and tobacco specialists' growth driven by upper-income consumers and a switch to Lebanese products

E-commerce continues to make inroads

Dual-market dynamic

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BAKED GOODS

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2025 Developments

Baked goods evolving through innovation and diversification

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Modest recovery after a period of significant volatility

Innovation catering to a rising, health-conscious consumer segment

What's Next

Sharp price increases less likely in a more stable economic environment
Flourishing pastries market
Companies responding to meet the demands of health-conscious consumers
Competitive Landscape
Chamsine Bakeries leads with its wide product variety
Chamsine capitalises on the consumer shift towards local products
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Breakfast cereals market remains small and constrained

Industry Performance

Volume stagnation due to high prices and a lack of cultural resonance

Traditional Lebanese breakfast options continue to dominate

What's Next

Sales to remain low and dependent on higher-income local consumers, tourists and expatriates

Local brands offering affordability to capture sales

Competitive Landscape

Leading Poppins offers a broad range of competitively priced RTE cereals

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Key Data Findings

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Industry Performance

Demand for shelf stable products supported by infrastructure challenges

Beef- and poultry-based products, and canned tuna remain popular

What's Next

Further growth with the introduction of healthier options

Competitively priced local products to record strongest growth

Alternatives market expected to remain niche despite growth

Competitive Landscape

Halwany Consumer Products Sal retains its top spot, offering a wide product range and competitive pricing

Two-tiered consumer dynamic

Channels

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Key Data Findings

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Fresh produce continues to be widely preferred

Lebanon's favourable climate ensures the availability of a wide range of fruit and vegetables

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Processed fruit and vegetables as complementary options

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Key Data Findings

2025 Developments

Stable volume sales of a mature market

Industry Performance

Rice and noodles remain essential staples

Highly competitive market

What's Next

Impact of maturity and budget constraints

Companies will need to focus on product innovation to drive growth

Strong preference for local products

Competitive Landscape

Aoun's longstanding presence, brand recognition, and extensive product line contribute to its lead

Strong performance of Maxim's thanks to its wide range

Channels

Modern grocery retailers offer convenience and a wide range of both international and local brands

Small local grocers benefit from their proximity and convenience

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