



Euromonitor
International

Soft Drinks in Lebanon

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EXECUTIVE SUMMARY

Soft drinks consumption recovers unevenly as dollarisation, and infrastructure constraints reshape demand

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Volume growth holds up despite uncertain context

Affordability keeps value-tier products central

Bottled water becomes a necessity as water governance weakens

Health and wellness interest returns, but is uneven by geography and gender

Product development shifts towards reduced sugar and functional positioning

Import pressure, local loyalty and brand mix shifts

Electricity and infrastructure constraints shape refrigeration, distribution and operating costs

WHAT'S NEXT?

Growth to stay mixed as essentials and on-trade seasonality drive volumes

Affordability shapes purchasing as formats shift towards value

Health-led products set to expand, with carbonated bottled water gaining relevance

COMPETITIVE LANDSCAPE

Nestlé leads while Pepsi-Cola maintains breadth and reach through a wide portfolio

Local brands gain momentum, but structural constraints limit innovation

CHANNELS

Foodservice recovers, supporting premium cues and seasonal peaks

Modern retail leads retail distribution as e-commerce expands

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CARBONATES

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2025 developments

Carbonates adapts through lower sugar formats as affordability shapes demand

Industry performance

Volume sales rise as consumption shifts towards lower sugar and smaller packs

Health consciousness grows, lifting reduced-sugar options and premium niches

Occasions sustain demand, especially where alcohol consumption was lower

Import dependence creates operational friction

What's next?

Carbonates growth set to continue as affordability and local preference shape choices

Health-led switching will accelerate shift away from carbonates

Manufacturing upgrades support quality and competitiveness despite high entry barriers

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Pepsi-Cola leads through portfolio scale and distribution reach

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Industry performance

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Fresh juice stays culturally central, while packaged options compete on convenience

Demographics and religion underpin baseline demand, with urban niches shaping premiumisation

What's next?

Steady volume growth projected with convenience trend boosting packaged juice

Health-led demand will rise as fresh competition intensifies

On-trade channel to expand as tourism strengthens seasonal demand

Competitive landscape

LibanJus leads through heritage and portfolio breadth

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Bottled water

Key data findings

2025 developments

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Industry performance

Bottled water maintains essential role as water system weaknesses persist

High prices and periodic scarcity push some consumers towards risky substitutes

Still water as firm favourite, while carbonated water drives premium cues and innovation

Packaging shifts towards PET as operating costs squeeze category

What's next?

Bottled water demand to keep rising as climate and water governance pressures intensify

A clearer split between value purified water and premium mineral options

Convenience channels and sustainability measures will gain importance

Competitive landscape

Nestlé leads through Pure Life and Sohat, bolstered by scale and distribution

Local brands strengthen their role as imported options narrow

Channels

Supermarkets and hypermarkets lead retail distribution

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Sports drinks grows from a small base in 2025 as fitness participation expands

Consumption stays tied to high-intensity exertion, keeping demand narrow

Energy drinks and protein options take more of the functional space

What's next?

Demand set to grow, but high prices will keep sports drinks niche

Powders and sachets expected to expand quickly as affordability reshapes the format mix

Clean-label innovation and social media will shape brand building, while substitutes will cap reach

Competitive landscape

Gatorade dominates through Pepsi-Cola distribution and science-led positioning

Competition stays narrow, with energy drinks as main functional alternative

Channels

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Supermarkets, hypermarkets and e-commerce gain relevance for planned purchases

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Key data findings

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Industry performance

Youth lifestyles drive 2025 growth as demand extends beyond Beirut

Nightlife and mixed-use occasions keep energy drinks highly visible

Marketing links energy drinks to performance, but regulation concerns persist

Reduced sugar energy drinks gains traction as brands broaden healthier variants

What's next?

Youth demand to keep driving growth, even as awareness rises

Digital-first marketing set to intensify as brands build identity beyond the product

Regulation risk to rise while zero-sugar innovation and tourism boost on-trade sales

Competitive landscape

Red Bull leads through brand equity, variant breadth and event-led marketing

Value brands and zero-sugar pushes increase competition, but scale remains uneven

Channels

Small local grocers drives distribution, supermarkets expands choice and value

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Industry performance

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Powder concentrates anchored in value use, liquid concentrates draws on traditional cues

Ramadan bolsters demand thanks to jallab's central role

What's next?

Retail volume growth anticipated to stays steady, with demand anchored in value options

Clean-label and functionality will gain greater relevance even as sugar concerns weigh on appeal

Digital routes to expand reach, while hospitality recovery lifts beverage occasions

Competitive landscape

Kassatly Chtaura leads liquid concentrates thanks to heritage flavours and brand equity

Darina focuses on fortified mixes and flavour breadth

Channels

Small local grocers leads, while modern grocery continues gaining ground

E-commerce grows fastest as brands expand direct access

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Rtd tea

Key data findings

2025 developments

RTD stays niche outside affluent urban consumers

Industry performance

RTD tea rise from low base, though visibility keeps sales limited

Limited competition constrains marketing and product development

RTD tea sits alongside hot tea rather than displacing other soft drinks

What's next?

Growth anticipated to remain modest as spending pressure and hot tea culture limit mainstream uptake

Functional formats as increasingly key to health-led positioning

Tourism, digital marketing and demographics to broaden reach, with Lipton staying ahead

Competitive landscape

Lipton dominates RTD tea with brand recognition, range and shelf presence

Kombucha brands build niche momentum through clean-label cues and local identity

Channels

Supermarkets leads, with convenience formats capturing impulse demand

E-commerce grows fastest, while cafés build familiarity through artisanal iced tea

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Rtd coffee

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Demand rises for cold coffee convenience

Social coffee culture limits mainstream uptake

Distribution and refrigeration constrain availability

Functional ingredients remain early-stage in RTD formats

What's next?

Moderate gains anticipated as affordability and culture keep RTD coffee niche

Product innovation will expand premiumisation and wellness positioning

Availability and price to drive outcomes as brands lean into digital-led awareness

Competitive landscape

Landessa leads brands, while Starbucks benefits from high recognition and broad range

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2025 developments

Volume sales rise in 2025 as curiosity for global flavours widens

Industry performance

Exposure expands interest in Asian speciality drinks

Bubble tea leads in 2025

Citrus twists add novelty across formats

What's next?

A niche consumer base should keep the category growing

Digital promotion widens reach and intensifies competition

Wellness positioning to strengthen interest in ingredient-led options

Competitive landscape

Mogu Mogu leads Asian speciality drinks through texture and availability

Leonard offers direct shelf alternative in nata de coco drinks

Channels

Hypermarkets dominates distribution for imported packaged drinks

Bubble tea cafés drive foodservice sales, with convenience outlets set to support impulse buys

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