Soft Drinks in Lebanon

March 2026

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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

Market data