



# Staple Foods in Lebanon

February 2026

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## Staple Foods in Lebanon

### 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

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#### 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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#### COUNTRY REPORTS DISCLAIMER

#### BAKED GOODS

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2025 Developments

Baked goods evolving through innovation and diversification

Industry Performance

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

Portfolio expansion supports strong growth of Daher International

Channels

Modern grocery retailers dominate, providing convenience and brand variety

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Key Data Findings

2025 Developments

Affordability, long shelf life and ease of storage benefit shelf stable products

## 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

Hypermarkets and supermarkets appeal with their wide selection of affordable, local products

Changing consumer lifestyles and purchasing habits drive growth of e-commerce

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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

### What's Next

Marginal value decline as the currency stabilises

Processed fruit and vegetables as complementary options

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Al Wadi al Akhdar enjoys strong consumer trust

Maxim's records strong growth thanks to its wide range of canned and frozen vegetables

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#### 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

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Small local grocers benefit from their proximity and convenience

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