



# Cooking Ingredients and Meals in Lebanon

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### EXECUTIVE SUMMARY

Optimism as the economy shows signs of recovery

### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

New government brings a sense of political stability

Boost in tourism benefits foodservice sales

Improving economic conditions and a renewed focus on local products create new opportunities

Greater political stability improves the feasibility of long-term agricultural strategies

Cautious optimism as the new government's focus on economic reforms and securing international financial support is a critical step

#### WHAT'S NEXT?

Economic recovery, rising consumer purchasing power and lifestyle trends set to drive growth

Emergence of new, innovative brands

E-commerce as a key area of growth

#### COMPETITIVE LANDSCAPE

Boulos enjoys a strong brand image and distribution

Kaddoum benefits from extensive distribution and its focus on quality

Dammess' share plummets following the destruction of its processing and storage facilities

#### CHANNELS

Supermarkets and hypermarkets leverage their strong brand recognition and consistent product availability

E-commerce expands, offering a seamless shopping experience and a wide assortment of products

Retail gains ground over foodservice

#### MARKET DATA

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2025 Developments

Widespread presence of artisanal olive oil

Industry Performance

Economic recovery and a rebound in consumer spending drive growth in 2025

Olive oil is one of the most important products manufactured in Lebanon

What's Next?

Edible oils on a positive growth trajectory

Rising demand for high-quality, high-phenolic varieties

Strong e-commerce growth and increasing adoption of modern technologies

Competitive Landscape

Boulos leads with its strong reputation for quality and widespread distribution

More artisanal brands are gaining international recognition

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Modern grocery retailers lead, offering a wide selection of branded products

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2025 Developments

Growing and evolving market

Industry Performance

Transformation shaped by economic pressures and evolving consumer behaviour

What's Next?

Success of products offering affordability and convenience

Opportunities for ready meals with rising demand for convenience among younger consumers

Changing consumer purchasing patterns with growth of e-commerce

Competitive Landscape

Maggi and Knorr provide convenient ways for consumers to add flavour to home-cooked meals

Sunbulah Group records the most dynamic growth

Channels

Ongoing economic crisis accelerates the shift away from small local grocers

Consumers increasingly value the convenience of e-commerce

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Sauces, dips and condiments provide an affordable way to add flavour and variety to meals

Industry Performance

Growth fuelled by shift to home cooking

Stock cubes and powders are considered essential products in most Lebanese kitchens

What's Next?

Economic recovery and rising demand for convenience support further growth

Rising demand for cleaner foods with fewer preservatives and products offering functional benefits

Competitive Landscape

Al Wadi's strength built on heritage, quality, and a strong commitment to Lebanese cuisine

Cortas Canning & Refrigerating invests in sustainable practices

Channels

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Strong local production of honey

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Honey represents a growing and profitable category

Economic recovery and a heightened focus on health as key growth drivers

Competitive Landscape

Local brand Kaddoum benefits from a well-established reputation for quality

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Channels

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