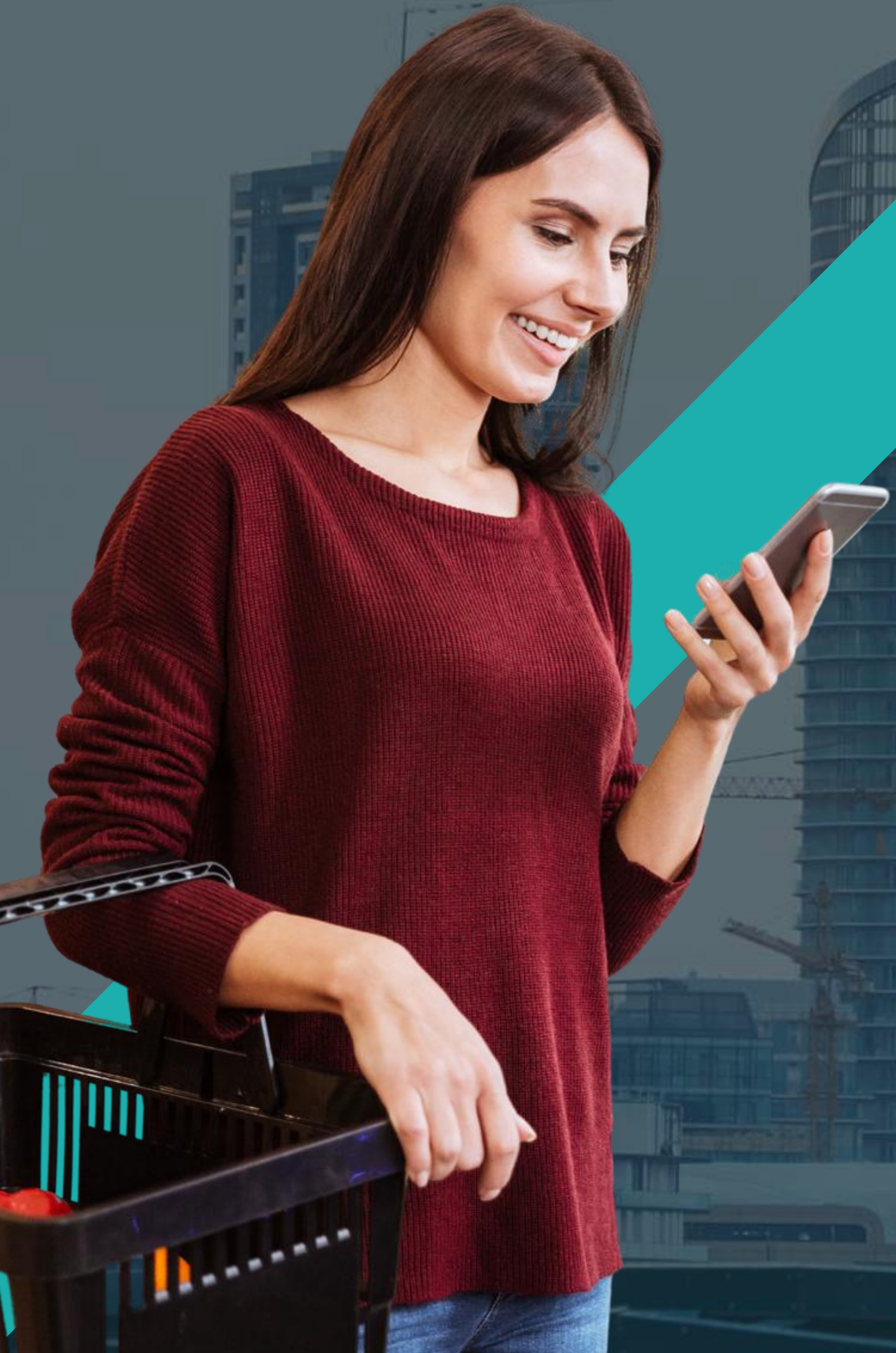


MADE IN LEBANON

Public Sentiments towards Lebanese Products

May 2025

Sample & Methodology

Sample size
1,000 respondents

Sample criteria
General public, purchase decision makers
Representative of the population across gender and age (13+)

Methodology
The survey was conducted via computer aided telephone interviews (CATI)

Geographical coverage
Conducted in Lebanon
with a nationwide coverage

Glossary

Gen Z
Generation Z refers to people born between 1997 and 2012 – currently aged 13 - 28 years old

Millennials
Millennials refers to people born between 1981 and 1996 – currently aged 29 - 44 years old

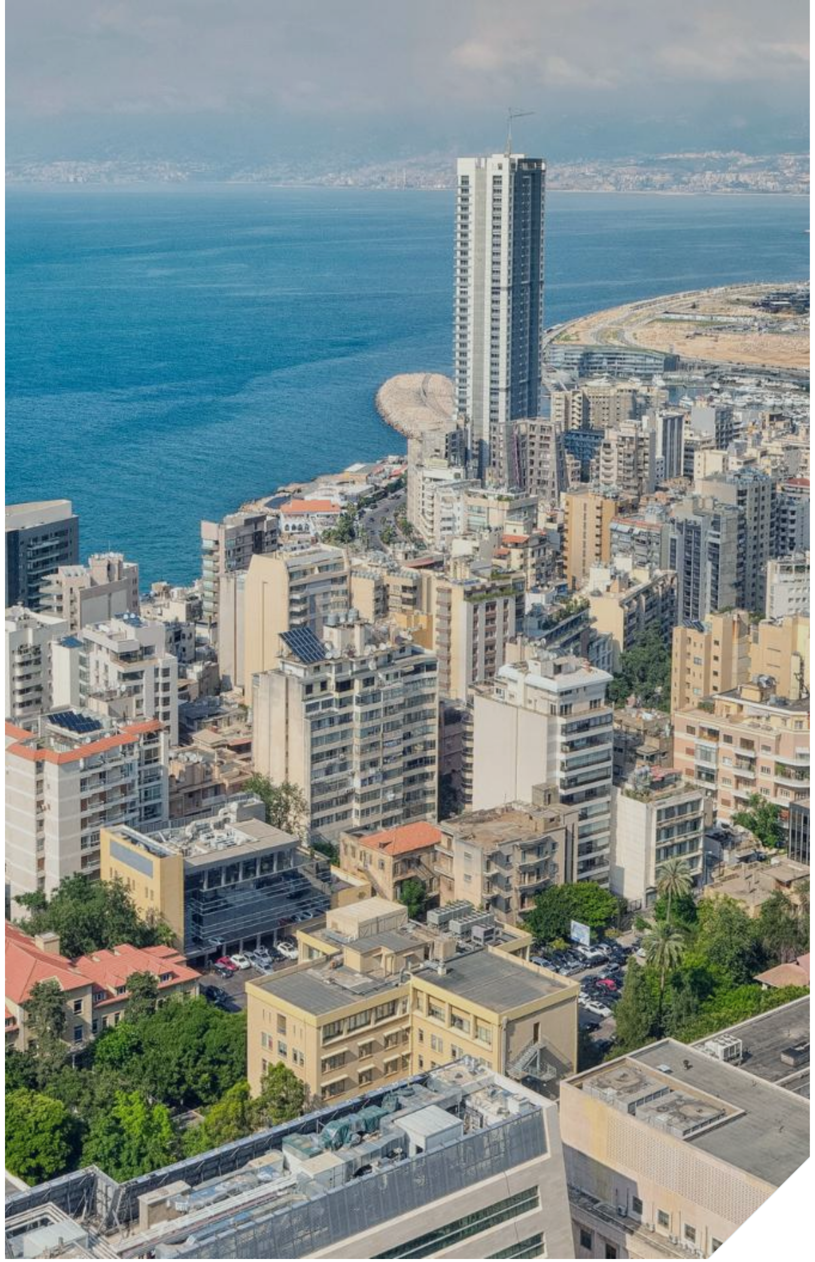
Gen X
Generation X refers to people born between 1965 and 1980 – currently aged 45 - 60 years old

Boomers
Boomers refers to people born between 1946 and 1964 –currently aged 61 - 79 years old

Table of Content

Awareness & Perceptions of Lebanese-made Products

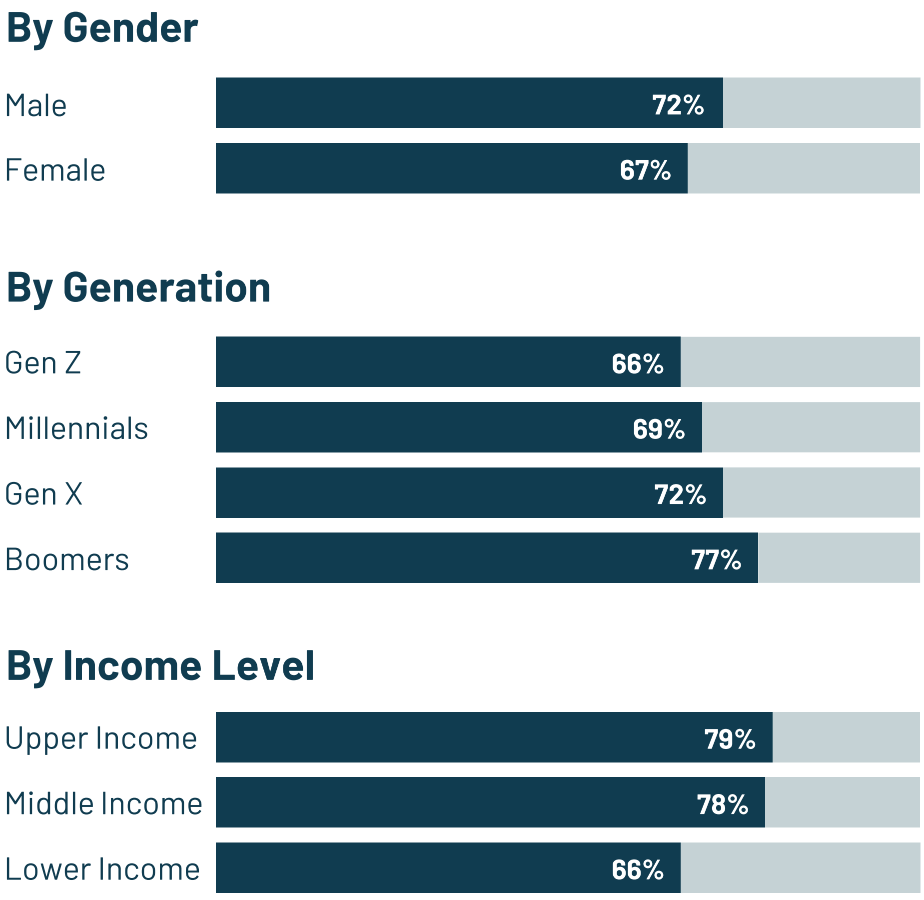
01



Awareness is high among Lebanese consumers regarding the local or foreign origin of products available in the country.

69%

Are aware of whether a product is locally made in Lebanon or imported



When it comes to locally-sourced products, people's descriptions span from good and excellent to evolving and in need of improvements.

But one thing is clear, the majority share a positive sentiment towards these products among the population.

68%

Perceive Lebanese-made products positively

By Gender

Male	69%
Female	68%

By Generation

Gen Z	67%
Millennials	66%
Gen X	73%
Boomers	68%

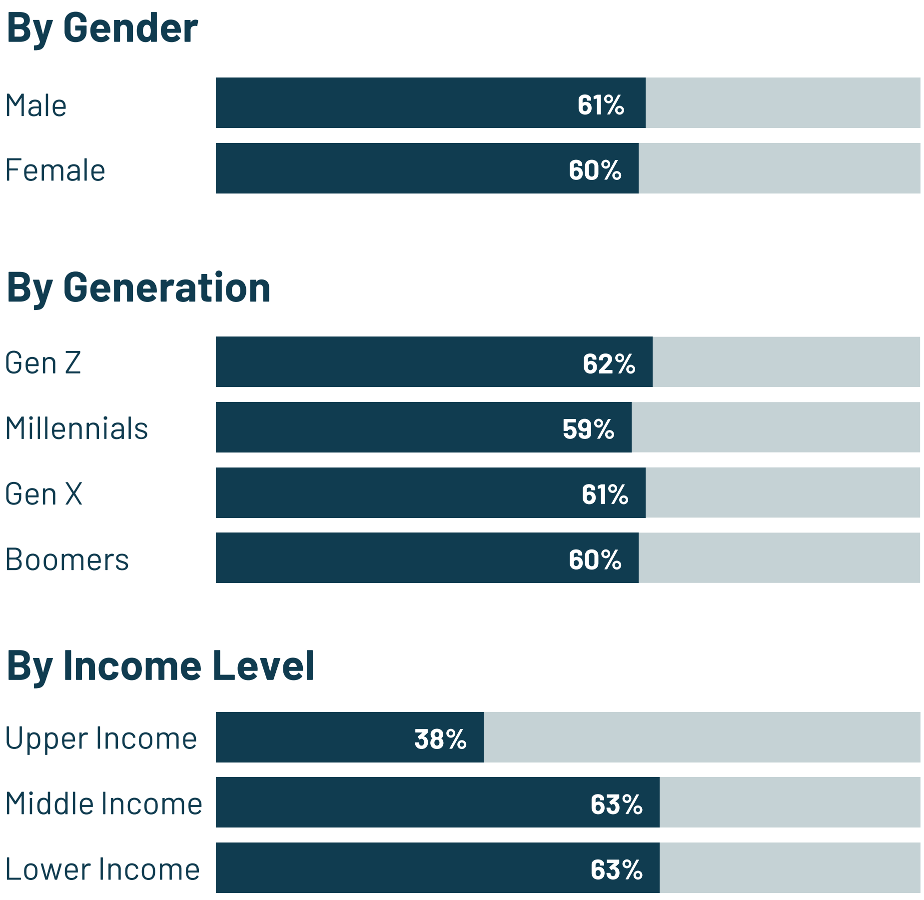
By Income Level

Upper Income	59%
Middle Income	70%
Lower Income	70%

Many even believe Lebanese-made products are on par with international quality standards.

61%

Believe that Lebanese-made products match international quality standards



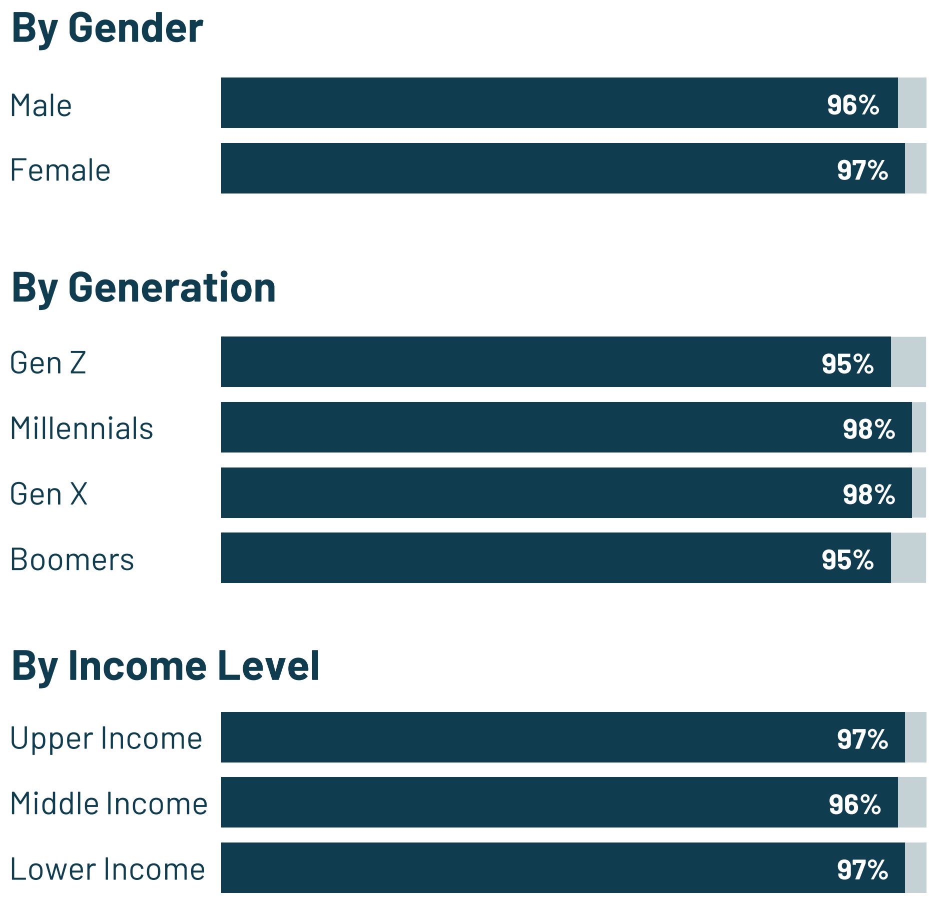
Lebanese-made Products’ Usage

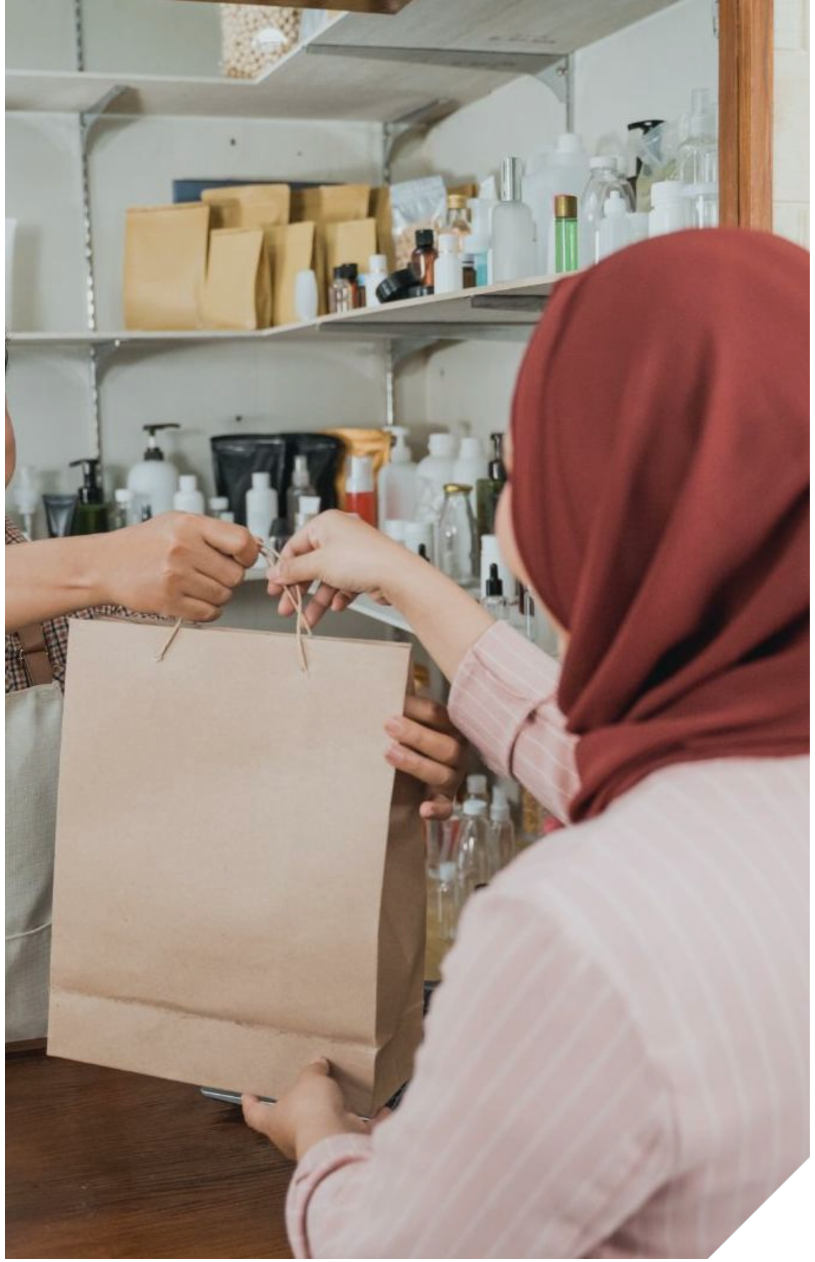
02

Lebanese consumers exhibit a strong sense of pride in supporting locally made products.

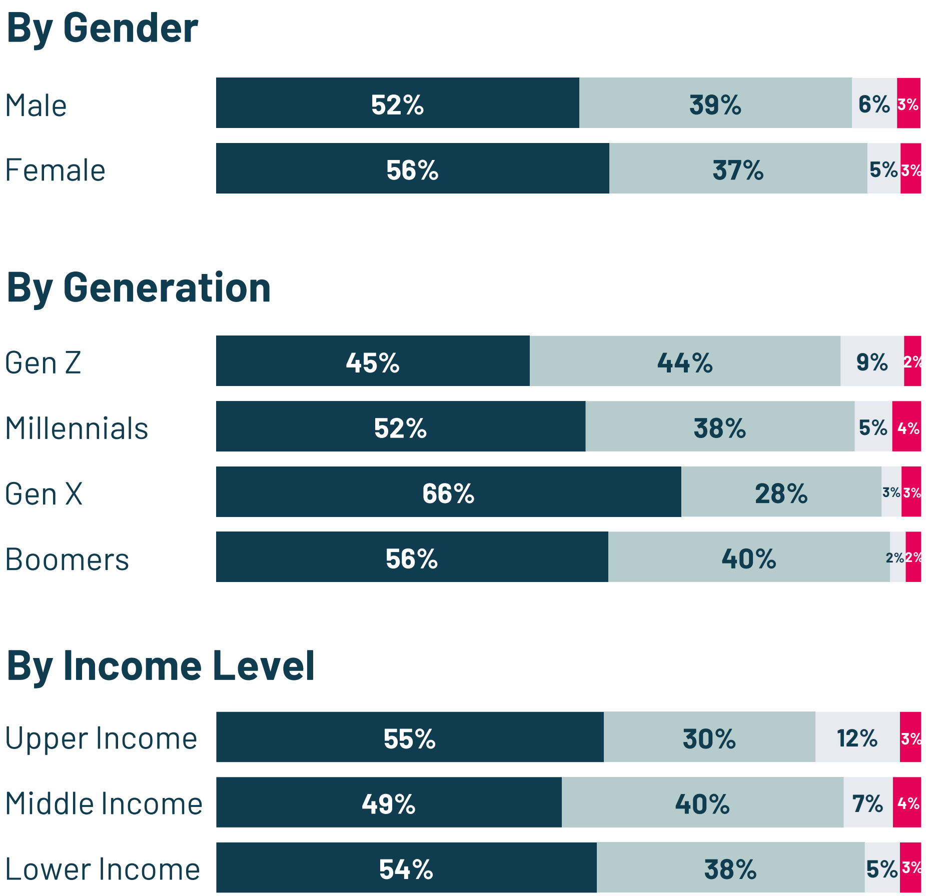
97%

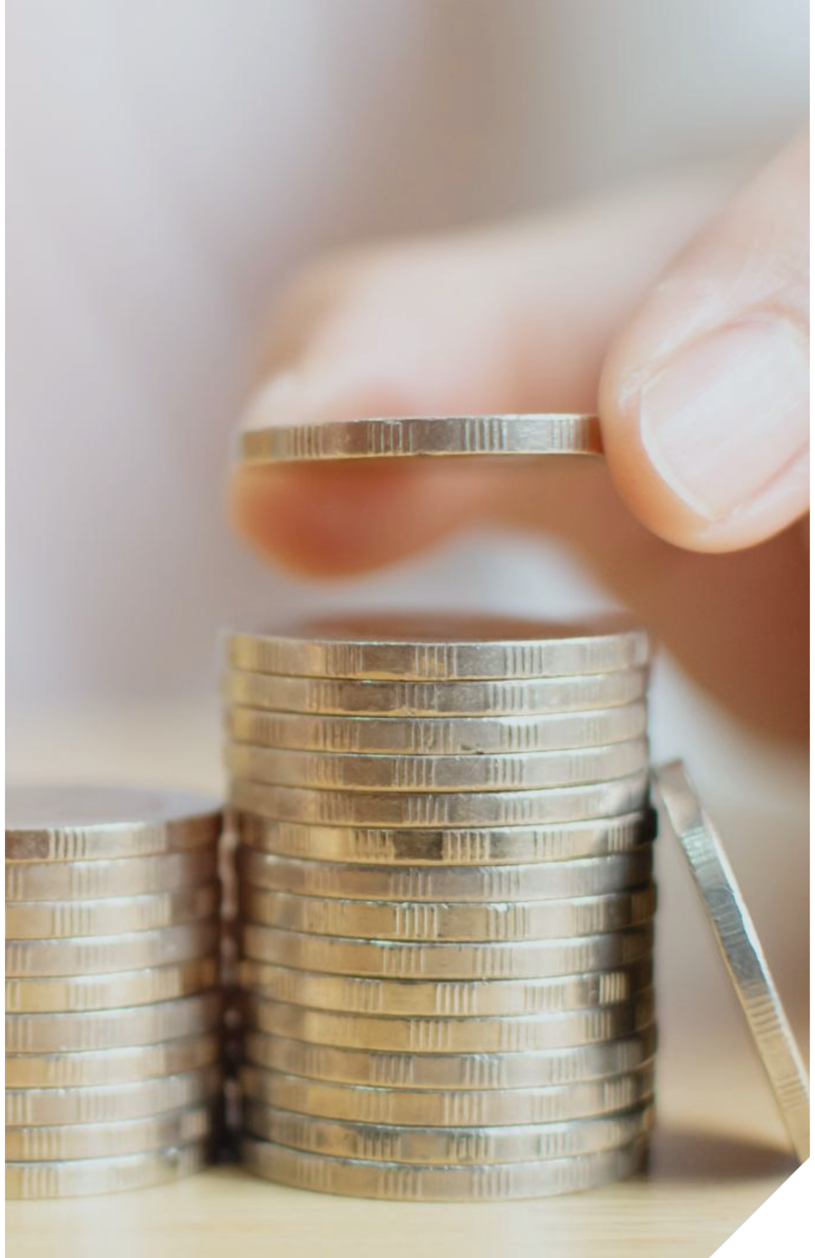
Are proud to support Lebanese-made products





In fact, many actively promote local products through their conversations and recommendations.

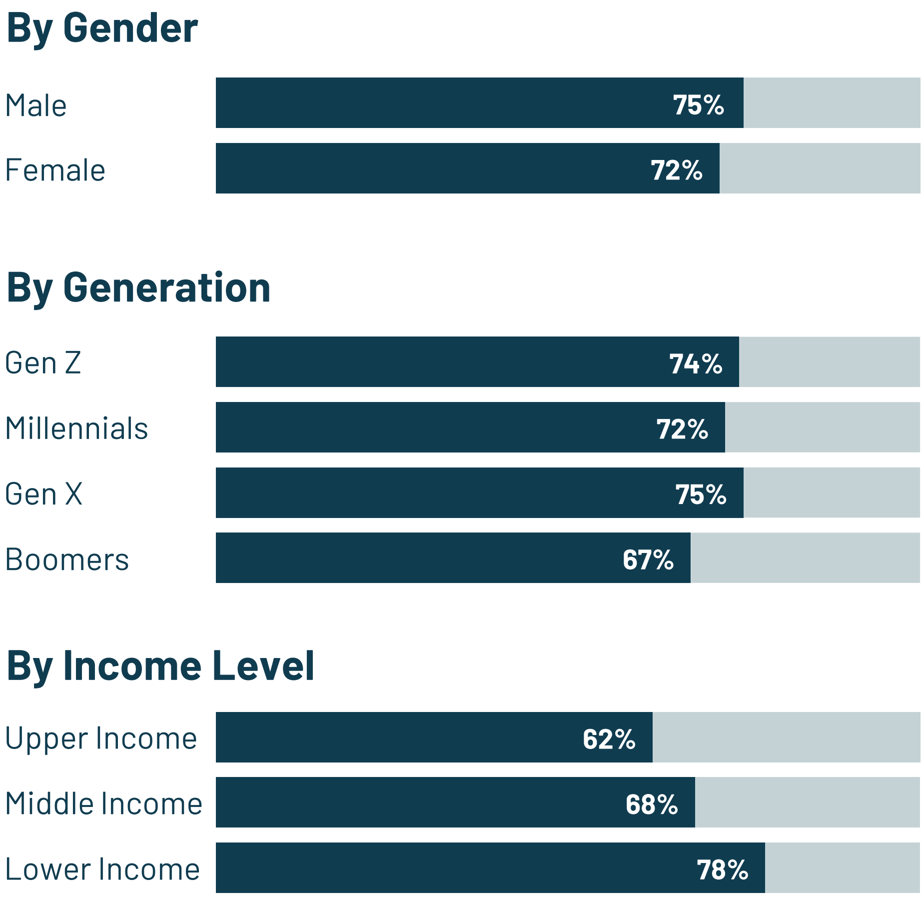




Moreover, economic difficulties over the past five years have pushed Lebanese consumers to turn towards local products.

73%

Have started using more local products over the past 5 years due to the economic crisis



Where the emphasis on supporting local businesses and finding affordable options illustrates how economic pressures have led them towards local brands.

Reasons for Choosing Local Products (Top 10)

- 43% To support local businesses
- 38% Affordability
- 22% To help the local economy
- 20% Quality & craftsmanship
- 12% Pride in Lebanese products
- 10% Good value for money
- 8% Accessibility/ availability
- 8% Trust in local brands
- 6% Convenience of finding products in small shops
- 4% More adapted to local tastes and needs

Since the economic crisis began, consumers have particularly increased their local product consumption in food, with rises also seen in beverages and personal care items.

Categories with Increased Local Product Usage Over the Past 5 Years

79%
Food

40%
Beverages

39%
Hair Care

37%
Body Care

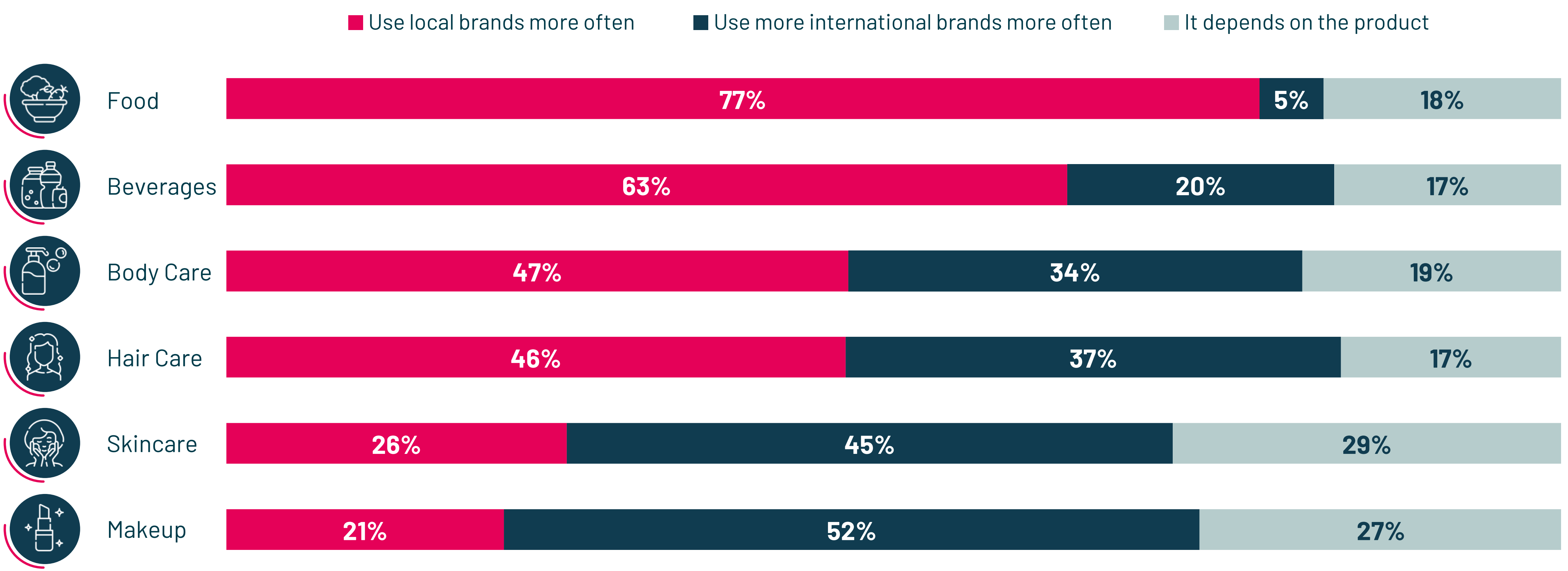
24%
Skincare

12%
Makeup

% out of people who have started using more local products over the past 5 years due to the economic crisis

In terms of share of wallet, local brands are more frequently selected in the food and beverage sector, whereas international brands hold a greater share in makeup and skincare.

Comparison of Local vs. International Brand Usage Across Categories



Share of Local Brand Usage

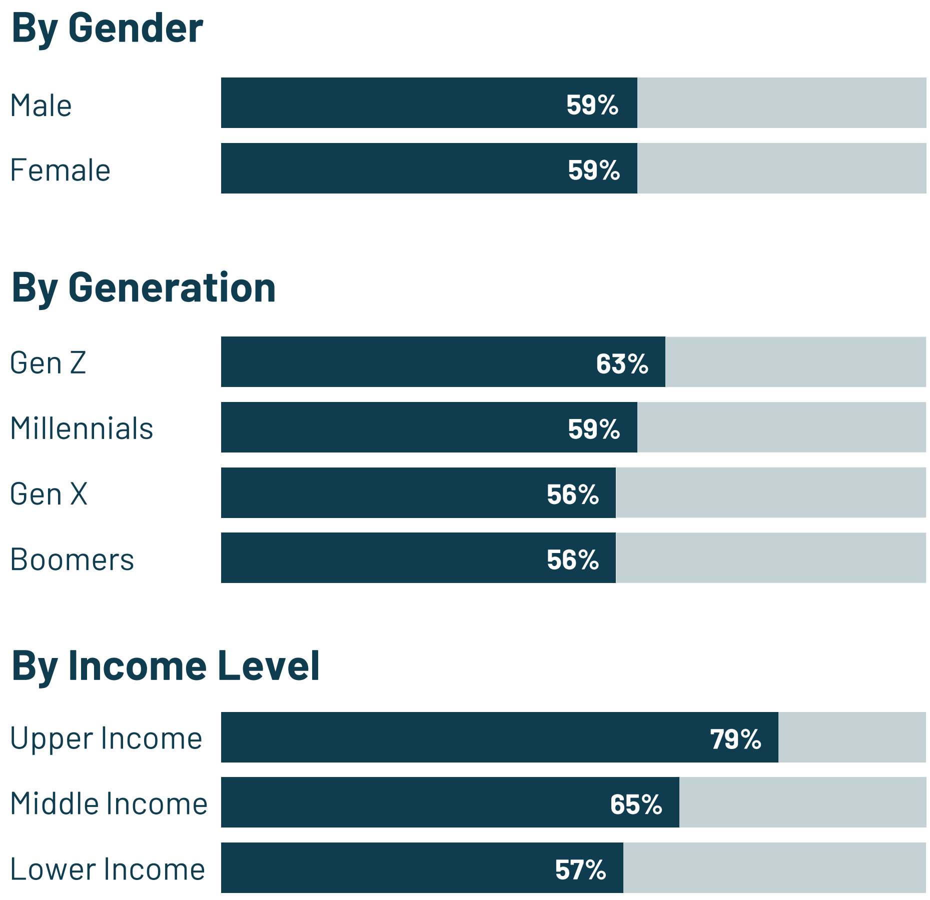
% Use more local products per category - by demographics

	Food	Beverages	Body Care	Hair Care	Skincare	Makeup
	77%	63%	47%	46%	26%	21%
Male	78%	60%	46%	44%	25%	-
Female	77%	66%	48%	48%	26%	21%
Gen Z	75%	55%	39%	40%	21%	14%
Millennials	75%	63%	43%	42%	25%	22%
Gen X	80%	67%	56%	55%	28%	25%
Boomers	85%	76%	57%	58%	36%	22%
Upper Income	71%	50%	32%	38%	6%	-
Middle Income	81%	69%	51%	45%	22%	15%
Lower Income	78%	63%	44%	47%	29%	26%

This disparity is due to a perceived lack of local cosmetics that cater to diverse preferences, a view highly shared by the youth and the more affluent.

59%

Believe there is a lack of local cosmetic products that cater to a variety of preferences



When it comes to future purchases, key motivators for buying more Lebanese products include ensuring high product quality and offering competitive pricing.

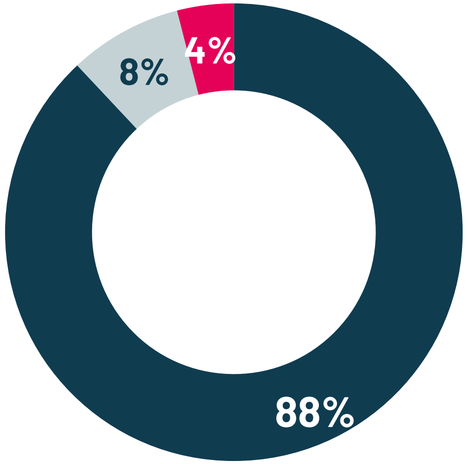
Motivators To Purchase More Local Products In The Future (Top 8)

47%	If the products' quality is high
45%	If the price is competitive/ product has high value for money
39%	Knowing that the purchase will support the local community
20%	If the products are more available and accessible
7%	If the products are trusted
6%	If there are more advertising campaigns
5%	If the product information and labeling are clear
4%	If the brand uses sustainable practices

Deep Dive: Exploring Dietary Needs in Lebanon's Food Sector

03

A review of dietary habits in Lebanon indicates that the vast majority are omnivores, while only a small number follow flexitarian or alternative diets.



Omnivore

Flexitarian

Others (e.g., vegetarian, pescatarian...etc.)

By Gender

	Omnivore	Flexitarian	Others
Male	89%	8%	3%
Female	87%	8%	5%

By Generation

	Omnivore	Flexitarian	Others
Gen Z	88%	8%	5%
Millennials	88%	8%	4%
Gen X	87%	10%	4%
Boomers	91%	5%	4%

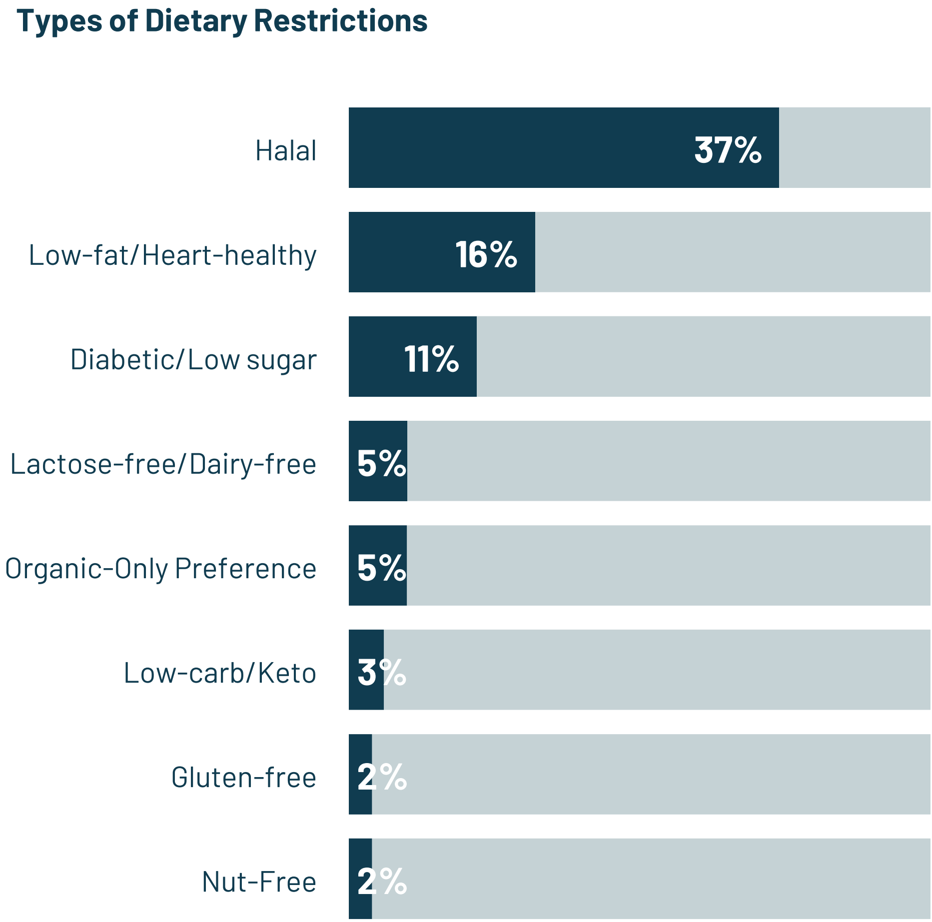
By Income Level

	Omnivore	Flexitarian	Others
Upper Income	88%	6%	6%
Middle Income	86%	10%	4%
Lower Income	88%	9%	4%

Despite that, many follow dietary restrictions, most prominently in accordance with halal requirements.

56%

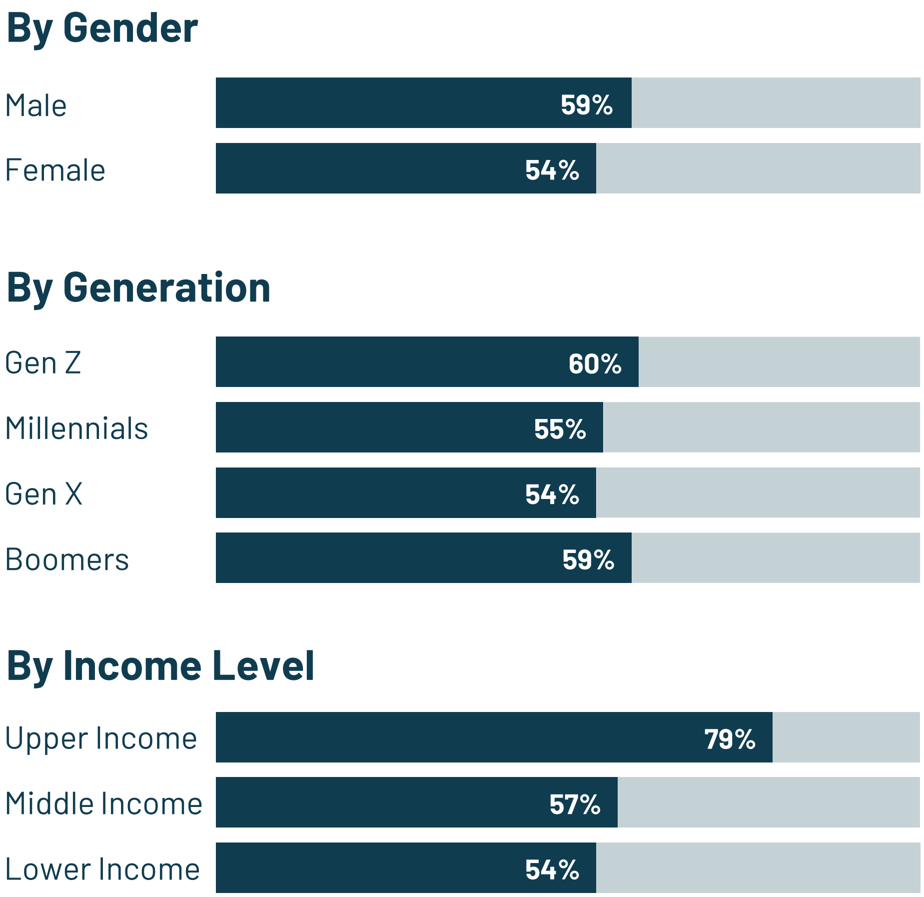
Following a specific dietary restrictions



With that in mind, most consumers believe local products fall short in meeting diverse dietary needs and preferences.

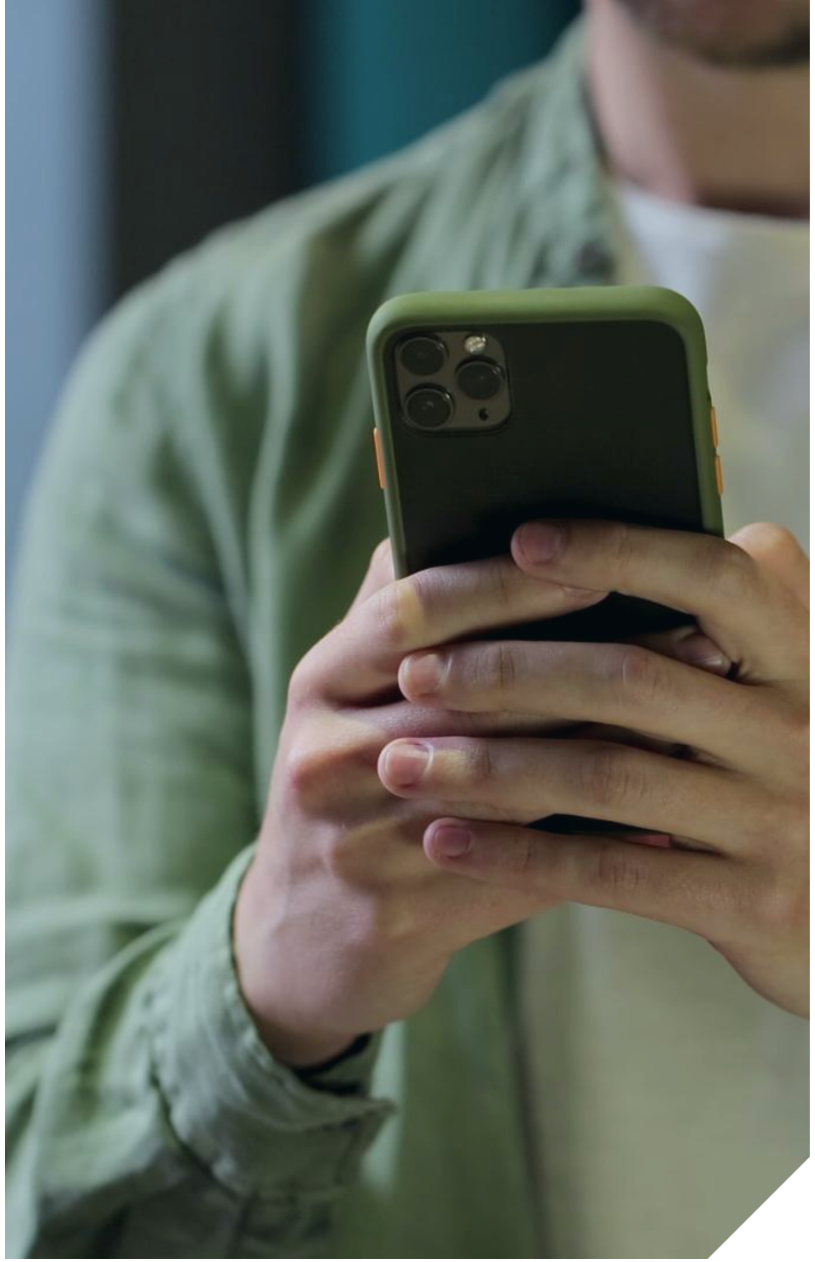
56%

Believe there is a shortage of local products that cater to a variety of dietary lifestyles or preferences

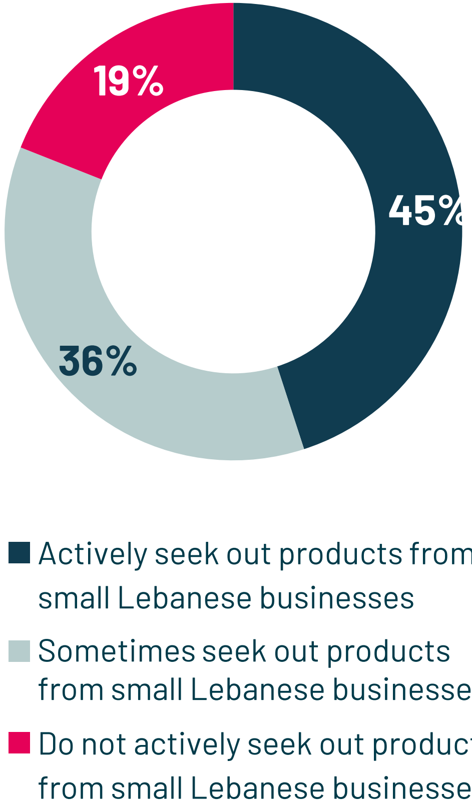


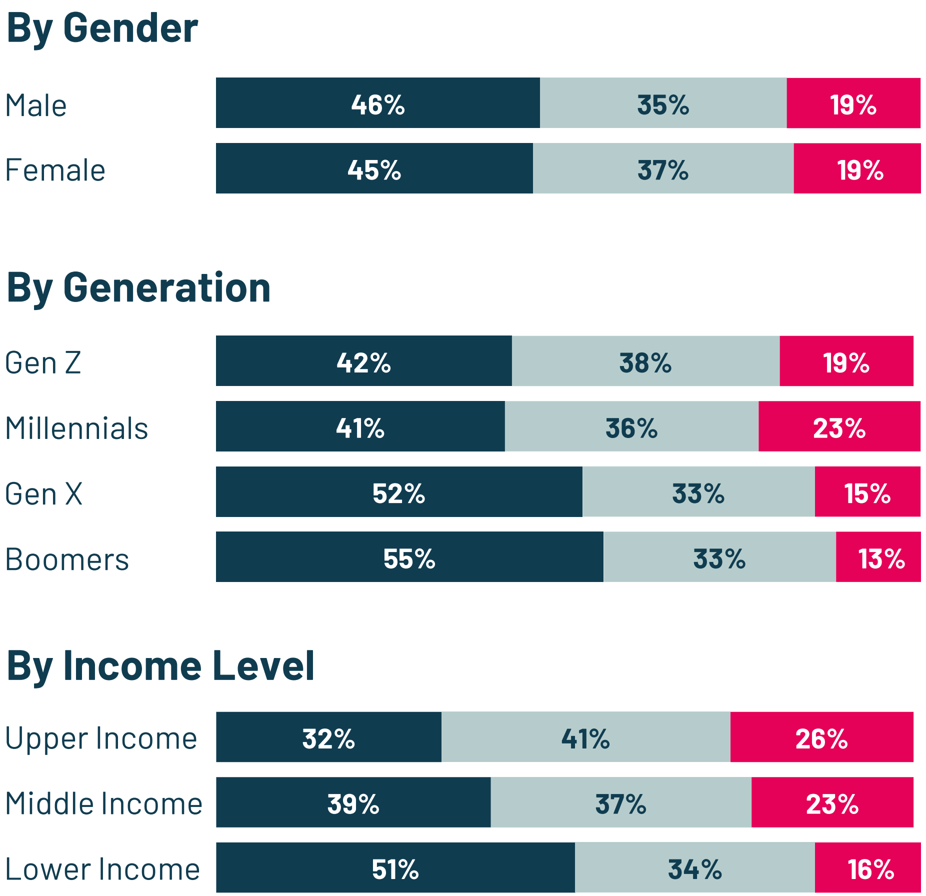
Views on Local Small Businesses

04



Half of the population actively supports small Lebanese businesses, with older generations and individuals in the lower income bracket more likely to do so.





However, perceived low quality and lack of trust are major factors that discourage purchases from small local businesses.

Barriers Preventing Purchases from Small Local Businesses (Top 6)

Barrier	%
Lower perceived quality	33%
Not trusted	26%
High prices	18%
Difficult to find	14%
Limited variety or stock	10%
Lack of awareness	10%

In terms of supporting small local businesses, people believe there should be greater awareness and more government initiatives, among other measures.

Ways The Public Believes Small Local Businesses Can Be Supported

61%
Improve the visibility/ awareness of small local businesses

27%
Through governmental initiatives

13%
Individual support (purchasing more from them)

12%
Financial support (investment and funding)

10%
Research and product development

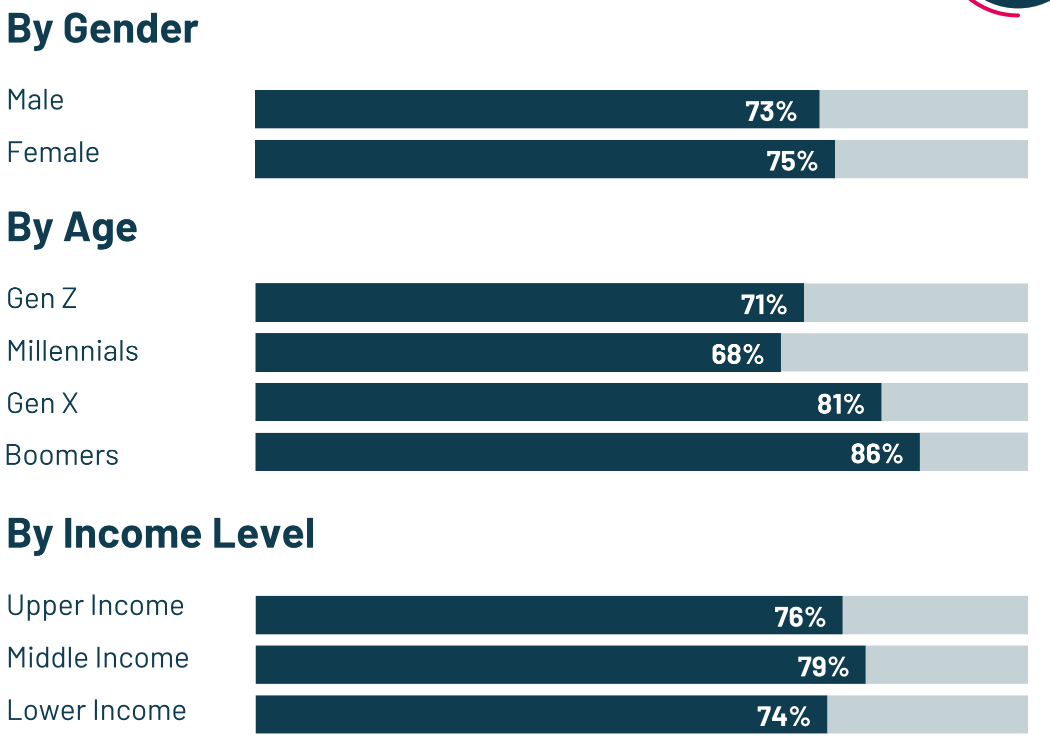
5%
Collaborations with local institutions

Media Habits

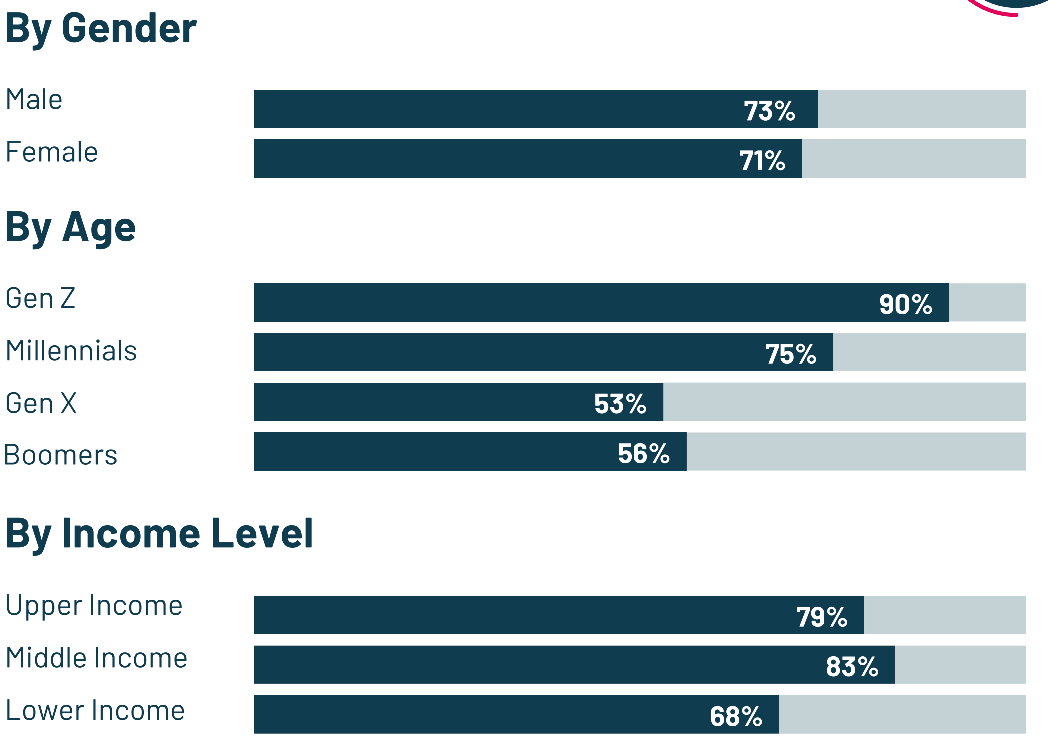
05

Lebanese consumers utilize both online and offline sources almost equally to gather product information, though the younger and more affluent individuals show a stronger inclination towards online channels.

74% Use offline sources to obtain information about products before buying them

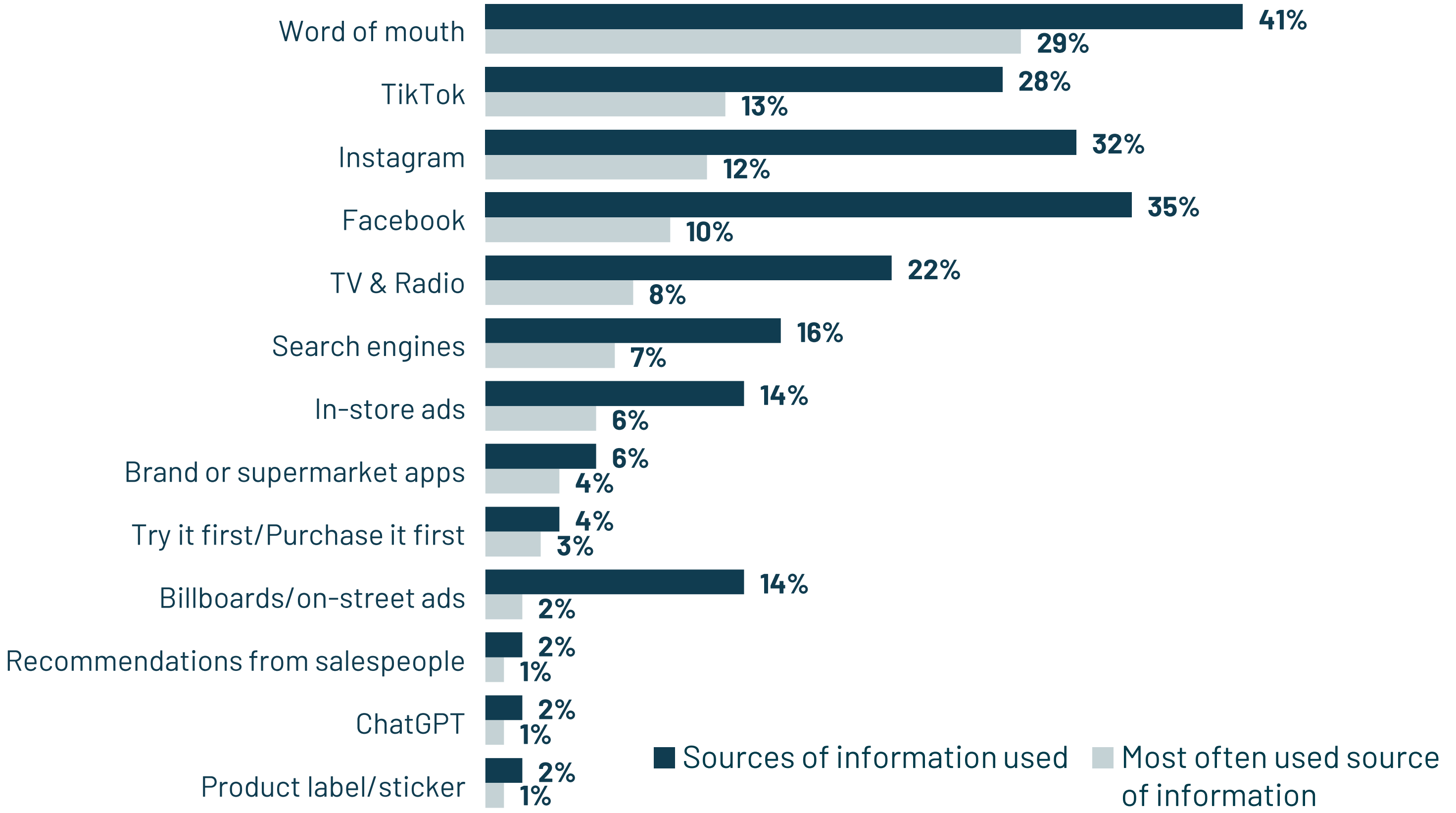


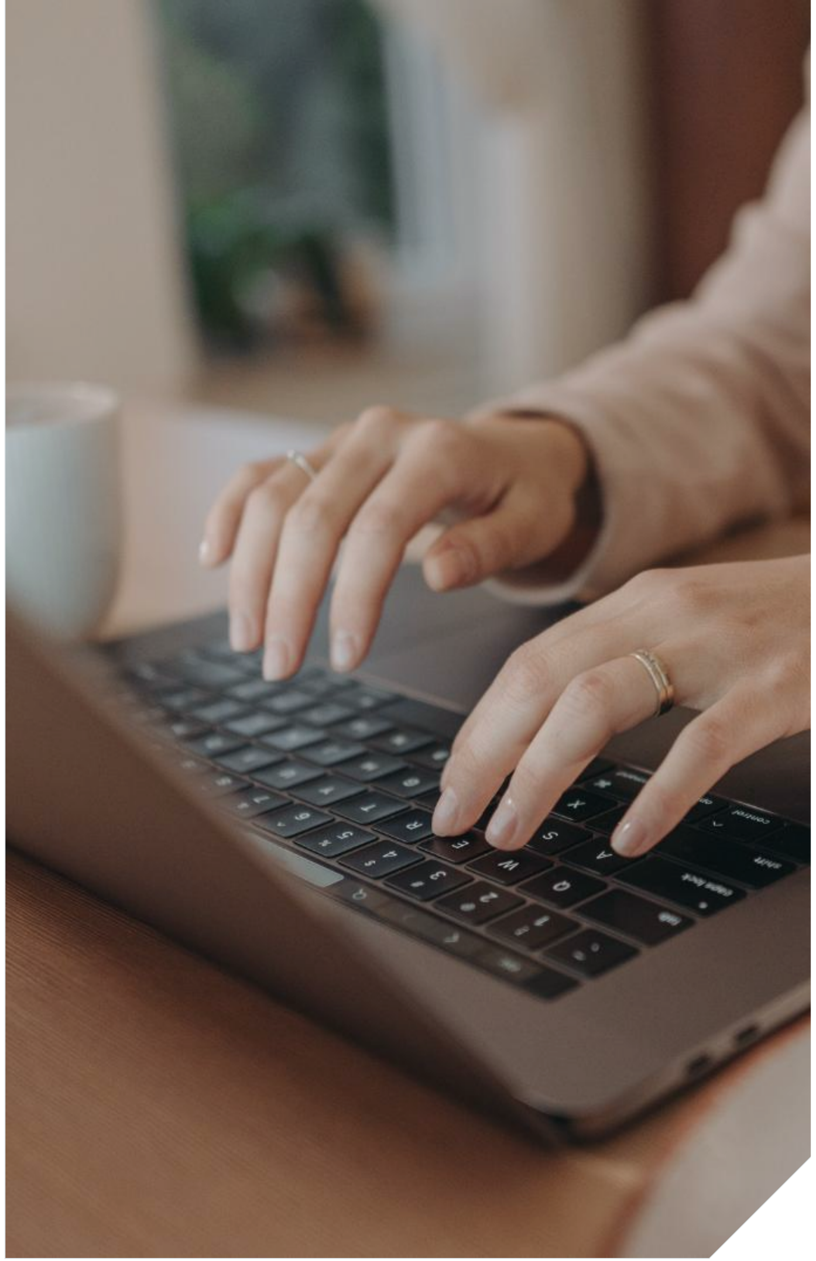
72% Use online sources to obtain information about products before buying them

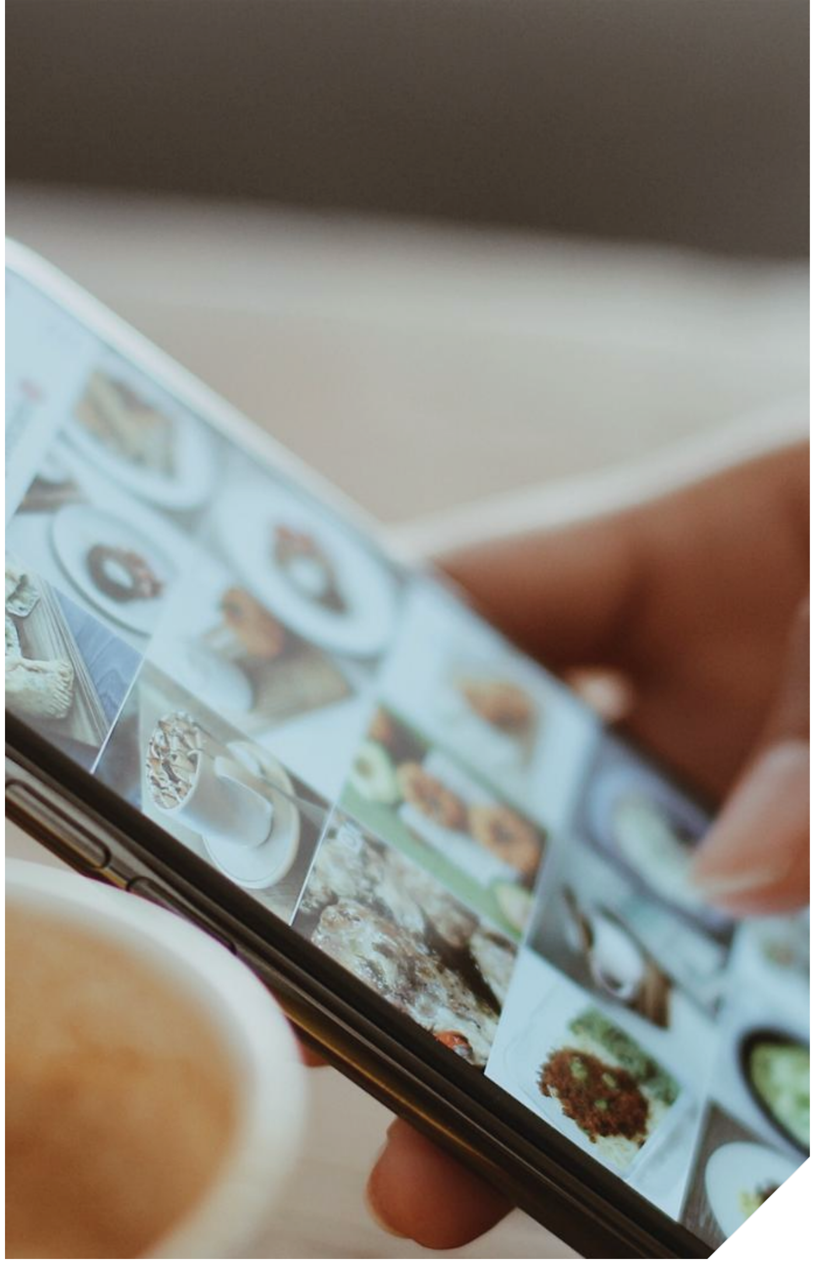


Yet, a closer look shows a heavy reliance on word of mouth followed by social media platforms.

Sources Of Information Used To Obtain Information About Products (Detailed)



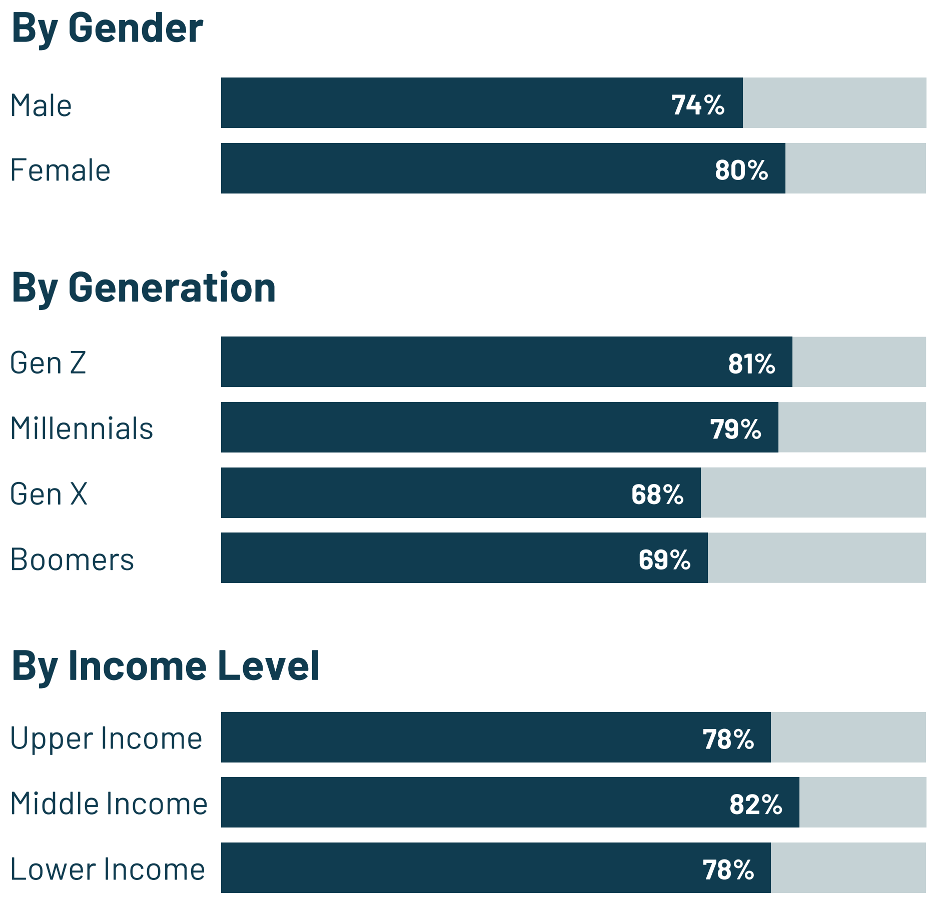




Building on the importance of social media platforms, the vast majority of consumers have discovered new Lebanese brands through these channels.

77%

Have discovered new Lebanese brands through social media

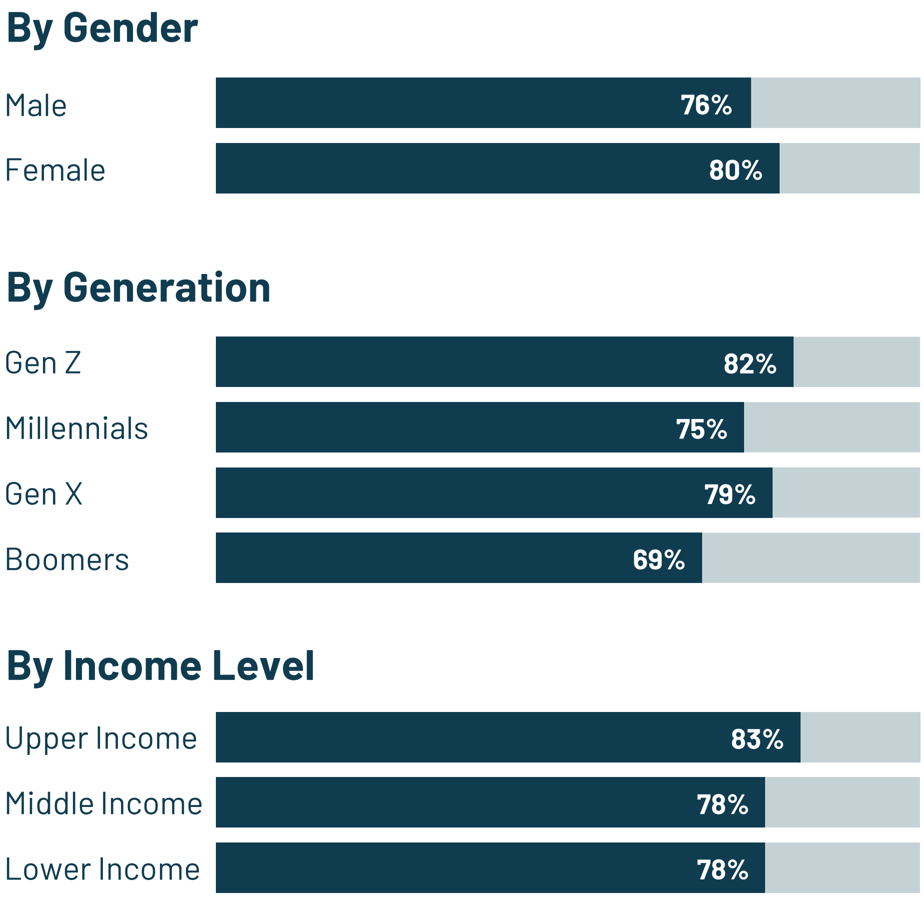


% out of people who get information about products from social media platforms

Highlighting social media's role in brand discovery, consumers are also more inclined to support a Lebanese brand if it actively engages with its followers online.

78%

Are more likely to support a Lebanese brand if it engages with its followers online



% out of people who get information about products from social media platforms

Content types that feature recommendations from influencers and include customer reviews are particularly effective in driving consumer interest and trial of local products.

Social Media Content Types That Encourage Local Product Trial

24% Recommendations or promotions by influencers or celebrities

23% Customer reviews & testimonials

20% High-quality visuals

19% Exclusive discounts, deals, or limited-time offers

18% Trending challenges, viral videos, or social media trends

14% User-generated content

12% Behind-the-scenes content about how the product is made

10% Brand story and values

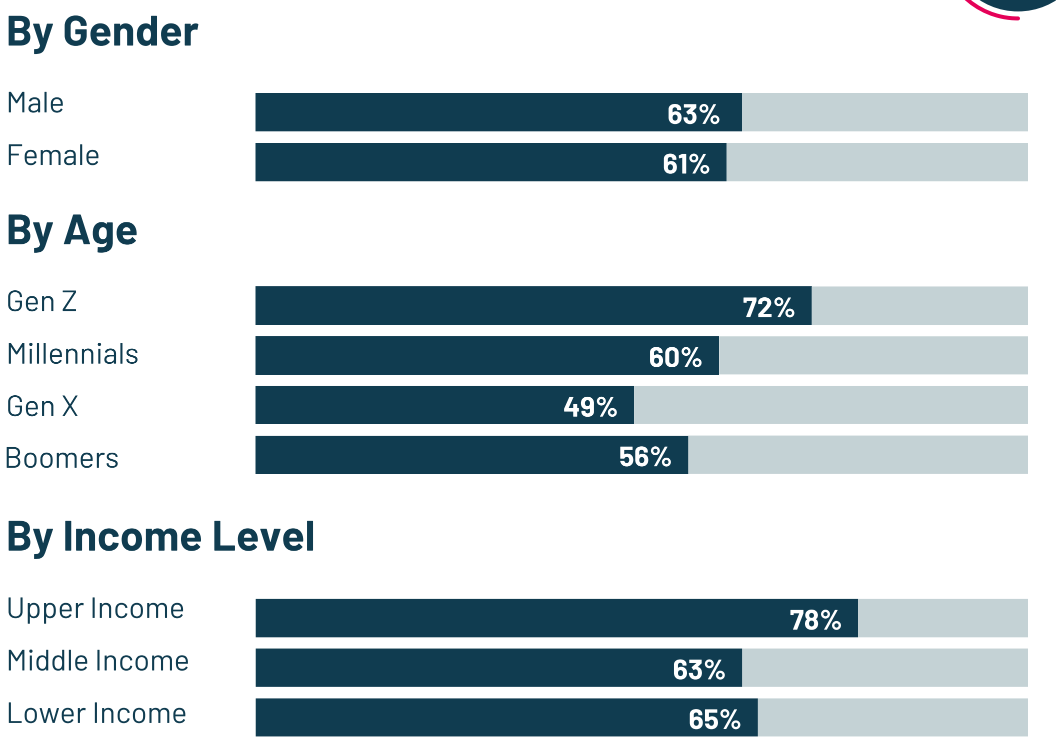
Social Media Content Types That Encourage Local Product Trial

% - by demographics

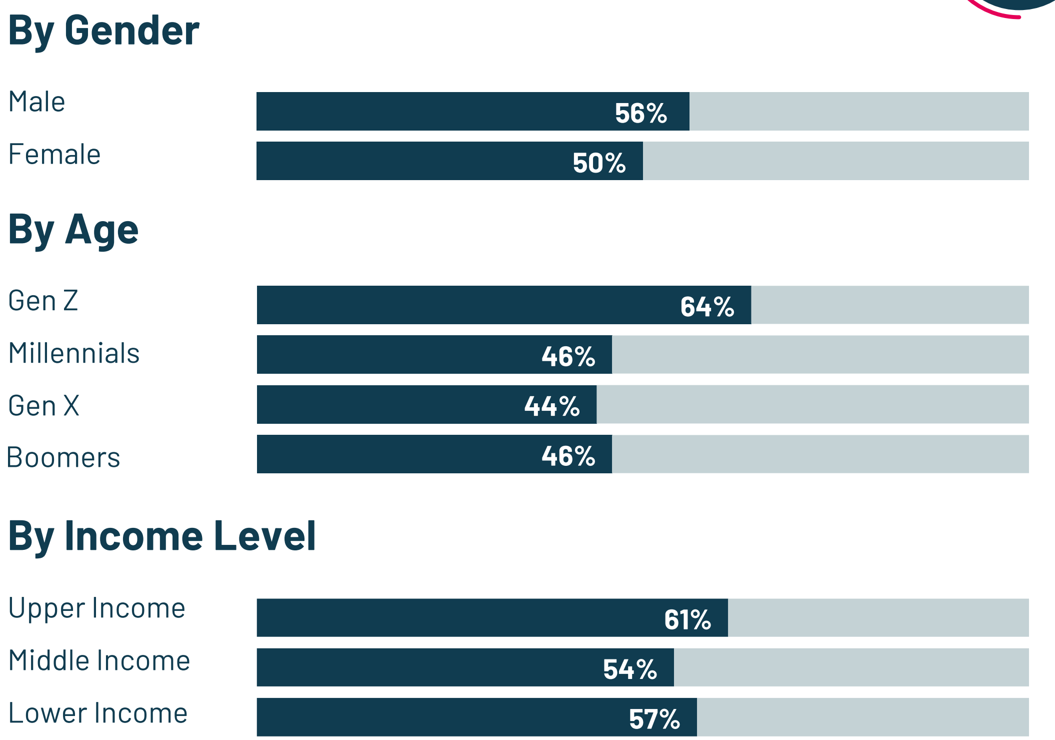
	24% Recommendations by influencers or celebrities	23% Customer reviews & testimonials	20% High-quality visuals	19% Exclusive discounts, deals, or limited-time offers	18% Trending challenges, viral videos, or social media trends	14% User-generated content	12% Behind-the-scenes content about how the product is made	10% Brand story and values
Male	25%	23%	19%	18%	17%	11%	12%	10%
Female	23%	23%	21%	20%	19%	17%	13%	10%
Gen Z	29%	23%	21%	15%	21%	14%	11%	11%
Millennials	19%	25%	17%	20%	18%	18%	13%	9%
Gen X	23%	20%	21%	21%	12%	12%	9%	10%
Boomers	26%	18%	23%	33%	18%	5%	21%	5%
Upper Income	44%	39%	11%	-	11%	11%	11%	22%
Middle Income	24%	19%	19%	21%	14%	16%	16%	18%
Lower Income	25%	26%	22%	22%	19%	13%	11%	5%

Influencers not only encourage local product trials but also enhance trust in products in general, particularly among Gen Z.

62% Have tried a Lebanese product after seeing it promoted by an influencer



53% Trust a product more when it is promoted or recommended by an influencer



% out of people who get information about products from social media platforms

How can Local brands better cater to Lebanese consumers?

Strike a Balance

Ensure prices remain attractive without sacrificing product quality. This is crucial in maintaining and growing a loyal consumer base amid economic challenges.

Have a Strategic Approach in Cosmetics

In a sector largely dominated by international brands and a market that perceives a lack of local players in the space, local brands must overcome a challenge of carving their niche and meeting the evolving preferences of Lebanese consumers.

Be Inclusive in Food Products

Expand product lines to cater to various dietary lifestyles, addressing the diverse dietary preferences in Lebanon.

Engage on Social Media

As consumers are more likely to trust brands that engage with followers online, strengthening brand presence through active social media interaction is crucial.

Leverage Influencers to Attract Youth

Gen Z consumers are more likely to be encouraged to try and trust local products if they are endorsed by influencers. Therefore, partnering with popular influencers can enhance credibility and appeal to younger audiences.

FOR MORE INFORMATION

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