

Lebanon Food and Drink Report Q1 2012

<https://marketpublishers.com/r/LDEF6A4886EEN.html>

Date: November 2011

Pages: 58

Price: US\$ 1,295.00 (Single User License)

ID: LDEF6A4886EEN

Abstracts

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Lebanon's economy is set to slow through 2011 and into 2012 as a combination of elevated commodity prices and a spike in political risk weighs on consumption and investment patterns. Headline food consumption is, therefore, expected to experience only modest growth as both the global slowdown and regional political crisis are beginning to filter through into weaker domestic economic activity. Accordingly, we have downgraded our forecast for real GDP growth for 2011 to 1.6% from 3.3% previously.

Headline Industry Data

2011 mass grocery retail sales = +12.8%; forecast to 2016 = +78.7%

2011 hypermarket sales = +16.1%; forecast to 2016 = +41%

2011 soft drink sales = +5.8%; forecast to 2016 = +32.1%

2011 food and drink exports = +7.5%; forecast to 2016 = +39%

Key Company Trends

New Food Safety Framework – In summer 2011 Lebanese government ministers agreed on a new food safety framework after being spurred into action by a television programme about Lebanon's food industry and the H111 E.coli outbreak in Europe. Ministers from the health, agriculture, tourism, economy and industry ministries are to implement short-term and medium-term measures to help improve food safety.

Carrefour MAF Reportedly Looking at Lebanon – Carrefour and the UAE-based Majid al-Futtaim (MAF), its exclusive franchise partner in the Middle East and North Africa (MENA), have developed a strong partnership over the years. Carrefour MAF has done well in the Gulf region, where it is a leading operator of hypermarkets – a format that is particularly popular in MENA. It is believed to now be keen to expand into the wider regions, into the likes of Iraq and Lebanon. Although the country is one of the few regional markets to offer neither a high-spending consumer base nor a large and populous market, with organised retailing still so underdeveloped there remain opportunities for companies like Carrefour MAF.

Key Risks to Outlook

Given Lebanon's reliance on foreign capital to finance domestic demand, a marked deterioration in regional or global capital markets over the coming quarters could slow financial inflow, which would negatively impact growth.

Ongoing unrest in Syria poses a distinct risk to Lebanon's economic and political stability. A prolonged period of public unrest would not only increase refugee inflows, but would also result in a significant slowdown in much needed tourist arrivals.

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Mass Grocery Retail

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Table: Key Players in Lebanon's Food & Drink Sector

Table: Key Players in Lebanon's Mass Grocery Retail Sector

Company Analysis

Food

Karoun Dairy

Drink

Societe Moderne Libanaise pour le Commerce (SMLC)

Compagnie des Sources de Liban (Sannine)

Almaza Beer

Mass Grocery Retail

Bou Khalil

Spinneys

BMI Methodology

Food & Drink Business Environment Ratings

Ratings Methodology

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Weighting

BMI Food & Drink Industry Glossary

Food & Drink

Mass Grocery Retail
BMI Food & Drink Forecasting & Sourcing
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