



Consumer Foodservice in Israel

March 2025

Table of Contents

EXECUTIVE SUMMARY

Consumer foodservice in 2024: The big picture

2024 key trends

Competitive landscape

Independent foodservice developments

What next for consumer foodservice?

MARKET DATA

Table 1 - Units, Transactions and Value Sales in Consumer Foodservice 2019-2024

Table 2 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2019-2024

Table 3 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2024

Table 4 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2019-2024

Table 5 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2019-2024

Table 6 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2024

Table 7 - Sales in Consumer Foodservice by Location: % Foodservice Value 2019-2024

Table 8 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2019-2024

Table 9 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2020-2024

Table 10 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2024

Table 11 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2024

Table 12 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2024-2029

Table 13 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Cafés/Bars in Israel

KEY DATA FINDINGS

2024 DEVELOPMENTS

Cafés face difficult trading conditions

Pret A Manger abandons plans to enter Israel

Growth of home coffee consumption hampers cafés

PROSPECTS AND OPPORTUNITIES

Slow recovery as higher taxes reduce disposable income

Operators will continue to open and expand

Strauss Group Ltd is to sell Elite Coffee chain

CATEGORY DATA

Table 14 - Cafés/Bars by Category: Units/Outlets 2019-2024

Table 15 - Sales in Cafés/Bars by Category: Number of Transactions 2019-2024

Table 16 - Sales in Cafés/Bars by Category: Foodservice Value 2019-2024

Table 17 - Cafés/Bars by Category: % Units/Outlets Growth 2019-2024

Table 18 - Sales in Cafés/Bars by Category: % Transaction Growth 2019-2024

Table 19 - Sales in Cafés/Bars by Category: % Foodservice Value Growth 2019-2024

Table 20 - GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2020-2024

Table 21 - GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2021-2024

Table 22 - Forecast Cafés/Bars by Category: Units/Outlets 2024-2029

Table 23 - Forecast Sales in Cafés/Bars by Category: Number of Transactions 2024-2029

Table 24 - Forecast Sales in Cafés/Bars by Category: Foodservice Value 2024-2029
Table 25 - Forecast Cafés/Bars by Category: % Units/Outlets Growth 2024-2029
Table 26 - Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2024-2029
Table 27 - Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2024-2029

Full-Service Restaurants in Israel

KEY DATA FINDINGS

2024 DEVELOPMENTS

Closures and lack of staff hinder performance
Full-service restaurants continue to push up prices
Players adapt model with limited-service offerings

PROSPECTS AND OPPORTUNITIES

Slow business recovery is expected
Players create special menus to support delivery business

CATEGORY DATA

Table 28 - Full-Service Restaurants by Category: Units/Outlets 2019-2024
Table 29 - Sales in Full-Service Restaurants by Category: Number of Transactions 2019-2024
Table 30 - Sales in Full-Service Restaurants by Category: Foodservice Value 2019-2024
Table 31 - Full-Service Restaurants by Category: % Units/Outlets Growth 2019-2024
Table 32 - Sales in Full-Service Restaurants by Category: % Transaction Growth 2019-2024
Table 33 - Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2019-2024
Table 34 - GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2020-2024
Table 35 - GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2021-2024
Table 36 - Forecast Full-Service Restaurants by Category: Units/Outlets 2024-2029
Table 37 - Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2024-2029
Table 38 - Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2024-2029
Table 39 - Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2024-2029
Table 40 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2024-2029
Table 41 - Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2024-2029

Limited-Service Restaurants in Israel

KEY DATA FINDINGS

2024 DEVELOPMENTS

Limited-service restaurants gain share at expense of full-service alternatives
More domestic travel has a positive impact
Wolt delivery supports limited-service restaurants

PROSPECTS AND OPPORTUNITIES

Slow recovery is anticipated amid rising taxes
Wolt to continue supporting the category
Cinnabon and Carvel enter the local market

CATEGORY DATA

Table 42 - Limited-Service Restaurants by Category: Units/Outlets 2019-2024
Table 43 - Sales in Limited-Service Restaurants by Category: Number of Transactions 2019-2024
Table 44 - Sales in Limited-Service Restaurants by Category: Foodservice Value 2019-2024
Table 45 - Limited-Service Restaurants by Category: % Units/Outlets Growth 2019-2024
Table 46 - Sales in Limited-Service Restaurants by Category: % Transaction Growth 2019-2024

Table 47 - Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2019-2024

Table 48 - GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2020-2024

Table 49 - GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2021-2024

Table 50 - Forecast Limited-Service Restaurants by Category: Units/Outlets 2024-2029

Table 51 - Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2024-2029

Table 52 - Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2024-2029

Table 53 - Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2024-2029

Table 54 - Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2024-2029

Table 55 - Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2024-2029

Street Stalls/Kiosks in Israel

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Street stalls/kiosks face difficult trading climate
- New re:bar drink targets health conscious consumers
- re:bar launches new delivery service app

PROSPECTS AND OPPORTUNITIES

- Recovery will be gradual
- Delivery services expected to gain traction
- Health trend will bring new innovations to the fore

CATEGORY DATA

Table 56 - Street Stalls/Kiosks: Units/Outlets 2019-2024

Table 57 - Sales in Street Stalls/Kiosks: Number of Transactions 2019-2024

Table 58 - Sales in Street Stalls/Kiosks: Foodservice Value 2019-2024

Table 59 - Street Stalls/Kiosks: % Units/Outlets Growth 2019-2024

Table 60 - Sales in Street Stalls/Kiosks: % Transaction Growth 2019-2024

Table 61 - Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2019-2024

Table 62 - GBO Company Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2020-2024

Table 63 - GBN Brand Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2021-2024

Table 64 - Forecast Street Stalls/Kiosks: Units/Outlets 2024-2029

Table 65 - Forecast Sales in Street Stalls/Kiosks: Number of Transactions 2024-2029

Table 66 - Forecast Sales in Street Stalls/Kiosks: Foodservice Value 2024-2029

Table 67 - Forecast Street Stalls/Kiosks: % Units/Outlets Growth 2024-2029

Table 68 - Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2024-2029

Table 69 - Forecast Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2024-2029

Consumer Foodservice By Location in Israel

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Decline in tourism hinders consumer foodservice in travel locations
- Ben Gurion Airport opens new catering tender
- Lodging locations face challenges from low tourism

PROSPECTS AND OPPORTUNITIES

- Slow recovery is expected for travel locations
- Lodging locations will be slow to recover

CATEGORY DATA

Table 70 - Consumer Foodservice by Location: Units/Outlets 2019-2024

Table 71 - Sales in Consumer Foodservice by Location: Number of Transactions 2019-2024

Table 72 - Sales in Consumer Foodservice by Location: Foodservice Value 2019-2024

Table 73 - Consumer Foodservice by Location: % Units/Outlets Growth 2019-2024

Table 74 - Sales in Consumer Foodservice by Location: % Transaction Growth 2019-2024

Table 75 - Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2019-2024

Table 76 - Consumer Foodservice through Standalone: Units/Outlets 2019-2024

Table 77 - Sales in Consumer Foodservice through Standalone: Number of Transactions 2019-2024

Table 78 - Sales in Consumer Foodservice through Standalone: Foodservice Value 2019-2024

Table 79 - Consumer Foodservice through Standalone: % Units/Outlets Growth 2019-2024

Table 80 - Sales in Consumer Foodservice through Standalone: % Transaction Growth 2019-2024

Table 81 - Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2019-2024

Table 82 - Consumer Foodservice through Leisure: Units/Outlets 2019-2024

Table 83 - Sales in Consumer Foodservice through Leisure: Number of Transactions 2019-2024

Table 84 - Sales in Consumer Foodservice through Leisure: Foodservice Value 2019-2024

Table 85 - Consumer Foodservice through Leisure: % Units/Outlets Growth 2019-2024

Table 86 - Sales in Consumer Foodservice through Leisure: % Transaction Growth 2019-2024

Table 87 - Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2019-2024

Table 88 - Consumer Foodservice through Retail: Units/Outlets 2019-2024

Table 89 - Sales in Consumer Foodservice through Retail: Number of Transactions 2019-2024

Table 90 - Sales in Consumer Foodservice through Retail: Foodservice Value 2019-2024

Table 91 - Consumer Foodservice through Retail: % Units/Outlets Growth 2019-2024

Table 92 - Sales in Consumer Foodservice through Retail: % Transaction Growth 2019-2024

Table 93 - Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2019-2024

Table 94 - Consumer Foodservice through Lodging: Units/Outlets 2019-2024

Table 95 - Sales in Consumer Foodservice through Lodging: Number of Transactions 2019-2024

Table 96 - Sales in Consumer Foodservice through Lodging: Foodservice Value 2019-2024

Table 97 - Consumer Foodservice through Lodging: % Units/Outlets Growth 2019-2024

Table 98 - Sales in Consumer Foodservice through Lodging: % Transaction Growth 2019-2024

Table 99 - Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2019-2024

Table 100 - Consumer Foodservice through Travel: Units/Outlets 2019-2024

Table 101 - Sales in Consumer Foodservice through Travel: Number of Transactions 2019-2024

Table 102 - Sales in Consumer Foodservice through Travel: Foodservice Value 2019-2024

Table 103 - Consumer Foodservice through Travel: % Units/Outlets Growth 2019-2024

Table 104 - Sales in Consumer Foodservice through Travel: % Transaction Growth 2019-2024

Table 105 - Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2019-2024

Table 106 - Forecast Consumer Foodservice by Location: Units/Outlets 2024-2029

Table 107 - Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2024-2029

Table 108 - Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2024-2029

Table 109 - Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2024-2029

Table 110 - Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2024-2029

Table 111 - Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2024-2029

Table 112 - Forecast Consumer Foodservice through Standalone: Units/Outlets 2024-2029

Table 113 - Forecast Sales in Consumer Foodservice through Standalone: Number of Transactions 2024-2029

Table 114 - Forecast Sales in Consumer Foodservice through Standalone: Foodservice Value 2024-2029

Table 115 - Forecast Consumer Foodservice through Standalone: % Units/Outlets Growth 2024-2029

Table 116 - Forecast Sales in Consumer Foodservice through Standalone: % Transaction Growth 2024-2029

Table 117 - Forecast Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2024-2029

Table 118 - Forecast Consumer Foodservice through Leisure: Units/Outlets 2024-2029

Table 119 - Forecast Sales in Consumer Foodservice through Leisure: Number of Transactions 2024-2029

Table 120 - Forecast Sales in Consumer Foodservice through Leisure: Foodservice Value 2024-2029

Table 121 - Forecast Consumer Foodservice through Leisure: % Units/Outlets Growth 2024-2029

Table 122 - Forecast Sales in Consumer Foodservice through Leisure: % Transaction Growth 2024-2029

Table 123 - Forecast Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2024-2029

Table 124 - Forecast Consumer Foodservice through Retail: Units/Outlets 2024-2029

Table 125 - Forecast Sales in Consumer Foodservice through Retail: Number of Transactions 2024-2029

Table 126 - Forecast Sales in Consumer Foodservice through Retail: Foodservice Value 2024-2029

Table 127 - Forecast Consumer Foodservice through Retail: % Units/Outlets Growth 2024-2029

Table 128 - Forecast Sales in Consumer Foodservice through Retail: % Transaction Growth 2024-2029

Table 129 - Forecast Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2024-2029

Table 130 - Forecast Consumer Foodservice through Lodging: Units/Outlets 2024-2029

Table 131 - Forecast Sales in Consumer Foodservice through Lodging: Number of Transactions 2024-2029

Table 132 - Forecast Sales in Consumer Foodservice through Lodging: Foodservice Value 2024-2029

Table 133 - Forecast Consumer Foodservice through Lodging: % Units/Outlets Growth 2024-2029

Table 134 - Forecast Sales in Consumer Foodservice through Lodging: % Transaction Growth 2024-2029

Table 135 - Forecast Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2024-2029

Table 136 - Forecast Consumer Foodservice through Travel: Units/Outlets 2024-2029

Table 137 - Forecast Sales in Consumer Foodservice through Travel: Number of Transactions 2024-2029

Table 138 - Forecast Sales in Consumer Foodservice through Travel: Foodservice Value 2024-2029

Table 139 - Forecast Consumer Foodservice through Travel: % Units/Outlets Growth 2024-2029

Table 140 - Forecast Sales in Consumer Foodservice through Travel: % Transaction Growth 2024-2029

Table 141 - Forecast Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2024-2029

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/consumer-foodservice-in-israel/report.