



Euromonitor
International

Consumer Foodservice in Israel

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EXECUTIVE SUMMARY

Sales hit by uncertainty and decline in tourism

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Economic and political uncertainty leads to sales decline
Rise in delivery services aids to overcome operational challenges
Digital transformation boosts customer retention

WHAT'S NEXT?

Future of consumer foodservice remains uncertain as war continues
Innovation is driving customer engagement
Farm-to-table movement is contributing to sustainability initiatives

COMPETITIVE LANDSCAPE

McDonald's Israel maintains its leadership through extensive branch network
Pizza Story witnessed consistent growth due to adapting fulfilment strategy
Independent eateries continue to emerge

CHANNELS

Independent foodservice operators has strong presence in Israel due to local trend
Wolt becomes a key driver in Israel foodservice channel innovation

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2025 DEVELOPMENTS

Cafés/bars face significant decline in revenues

INDUSTRY PERFORMANCE

Cafés/bars close due to Israel-Hamas war impacting foodservice revenue

Independent cafes remain resilient by catering to changing consumer and local dynamics
Economic pressure has reduced menu innovation with focus on best-selling items

WHAT'S NEXT?

Revenue squeeze on cafés/bars will continue if war persists
Delivery services keep cafés afloat
Plant-based menus to aid sustainability initiatives

COMPETITIVE LANDSCAPE

Aroma Express solidifies its leadership through large network on branches
Arcafe (Israel Ltd) is strategically expanding to remain resilient in face of the war
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[Full-Service Restaurants in Israel](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sales decline as consumers shift to more affordable foodservice options

INDUSTRY PERFORMANCE

Full-service restaurants face plummeting revenues as demand drops
Asian full service restaurants continue to grow as Japanese cuisine permeates the food scene
Fine dining drops as delivery and takeout grows

WHAT'S NEXT?

Future of full-service restaurants remains uncertain due to current geopolitical conflict
Wolt expands to cater to restaurants across Israel
Sustainability initiatives are driven by environmentally-friendly menu options

COMPETITIVE LANDSCAPE

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Limited-Service Restaurants in Israel

KEY DATA FINDINGS

2025 DEVELOPMENTS

Limited-service restaurants show sales rise

INDUSTRY PERFORMANCE

Closure of major chained limited service restaurant leads to sales decline

Consumer demand for pizza limited-chain restaurants shows resilience

Indulgent and comfort food options gain popularity in limited-service restaurants

WHAT'S NEXT?

Limited service restaurants will continue to grow as pizza and burger outlets prove resilient

Evolution of digital ordering supports category sales

Plant based menu and sustainable sourcing to drive sustainability initiatives

COMPETITIVE LANDSCAPE

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Street Stalls/Kiosks in Israel

KEY DATA FINDINGS

2025 DEVELOPMENTS

Weak demand for street stalls/kiosks

INDUSTRY PERFORMANCE

- Israel-Hamas conflict has greatly impacted street stall/kiosks revenues
- Independent street stall/kiosks retain strong appeal due to authentic local cuisine experience
- Street stall/kiosks expand to offer delivery services to sustain business revenue

WHAT'S NEXT?

- Conflict-induced disruption is expected to affect the future performance of street stalls/kiosks
- Integration of delivery services and digital innovation is expected to support the management of street stall/kiosks
- Innovation in menu and digital engagement expected to aid street stall/kiosks

COMPETITIVE LANDSCAPE

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- re:bar's growth is attributed to its continuous menu innovation and digital capabilities
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Consumer Foodservice By Location in Israel

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All consumer foodservice locations face financial pressure

INDUSTRY PERFORMANCE

Foodservices sales through travel remain volatile

Standalone restaurant revenue drops with rise in closures across Israel

Economic uncertainty leads to decline in dining out culture

WHAT'S NEXT?

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Future of standalone consumer foodservice remains uncertain

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