

Soft Drinks in Israel

December 2023

Table of Contents

Soft Drinks in Israel

EXECUTIVE SUMMARY

Soft drinks in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

Foodservice vs retail split

What next for soft drinks?

MARKET DATA

Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2018-2023

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2018-2023

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2018-2023

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2018-2023

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2023

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2023

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2023

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2023

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2018-2023

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2018-2023

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2018-2023

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2018-2023

Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2018-2023

Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2018-2023

Table 15 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2019-2023

Table 16 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2023

Table 17 - NBO Company Shares of Off-trade Soft Drinks: % Value 2019-2023

Table 18 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2020-2023

Table 19 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2018-2023

Table 20 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2018-2023

Table 21 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2018-2023

Table 22 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2023

Table 23 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2023-2028

Table 24 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2023-2028

Table 25 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2023-2028

Table 26 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2023-2028

Table 27 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2023-2028

Table 28 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2023-2028

Table 29 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2023-2028

Table 30 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2023-2028

Table 31 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2023-2028

Table 32 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2023-2028

APPENDIX

Fountain sales in Israel

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Bottled Water in Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Prices go up
Eden retains lead
Nordic Mist enters market

PROSPECTS AND OPPORTUNITIES

Tempo to take over distribution of Eden
Health and wellness to remain a key influence
At-home water dispensers threaten the category

CATEGORY DATA

Table 33 - Off-trade Sales of Bottled Water by Category: Volume 2018-2023
Table 34 - Off-trade Sales of Bottled Water by Category: Value 2018-2023
Table 35 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2018-2023
Table 36 - Off-trade Sales of Bottled Water by Category: % Value Growth 2018-2023
Table 37 - NBO Company Shares of Off-trade Bottled Water: % Volume 2019-2023
Table 38 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2020-2023
Table 39 - NBO Company Shares of Off-trade Bottled Water: % Value 2019-2023
Table 40 - LBN Brand Shares of Off-trade Bottled Water: % Value 2020-2023
Table 41 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2023-2028
Table 42 - Forecast Off-trade Sales of Bottled Water by Category: Value 2023-2028
Table 43 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2023-2028
Table 44 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2023-2028

Carbonates in Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Tax removed
Prices increase
Schweppes attempts to compete with Coca-Cola

PROSPECTS AND OPPORTUNITIES

Courts uphold Competition Commissioner's decision on carbonates leader
Talks of price controls
Rising cost of living and increasing influence of health and wellness trend

CATEGORY DATA

Table 45 - Off-trade vs On-trade Sales of Carbonates: Volume 2018-2023
Table 46 - Off-trade vs On-trade Sales of Carbonates: Value 2018-2023
Table 47 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2018-2023
Table 48 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2018-2023
Table 49 - Off-trade Sales of Carbonates by Category: Volume 2018-2023
Table 50 - Off-trade Sales of Carbonates by Category: Value 2018-2023
Table 51 - Off-trade Sales of Carbonates by Category: % Volume Growth 2018-2023
Table 52 - Off-trade Sales of Carbonates by Category: % Value Growth 2018-2023
Table 53 - Total Sales of Carbonates by Fountain On-trade: Volume 2018-2023
Table 54 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2018-2023
Table 55 - NBO Company Shares of Off-trade Carbonates: % Volume 2019-2023
Table 56 - LBN Brand Shares of Off-trade Carbonates: % Volume 2020-2023
Table 57 - NBO Company Shares of Off-trade Carbonates: % Value 2019-2023

Table 58 - LBN Brand Shares of Off-trade Carbonates: % Value 2020-2023

Table 59 - Forecast Off-trade Sales of Carbonates by Category: Volume 2023-2028

Table 60 - Forecast Off-trade Sales of Carbonates by Category: Value 2023-2028

Table 61 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2023-2028

Table 62 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2023-2028

Table 63 - Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2023-2028

Table 64 - Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2023-2028

Concentrates in Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Removal of tax on sweetened beverages

Osem retains lead

Liquid concentrates volumes fall, while powder concentrates sales remain negligible

PROSPECTS AND OPPORTUNITIES

Market to see continuing decline

Manufacturer innovation to address health concerns

Osem to remain the market leader

CATEGORY DATA

Concentrates Conversions

Summary 2 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

Table 65 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2018-2023

Table 66 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2018-2023

Table 67 - Off-trade Sales of Concentrates by Category: Value 2018-2023

Table 68 - Off-trade Sales of Concentrates by Category: % Value Growth 2018-2023

Table 69 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2020-2023

Table 70 - NBO Company Shares of Off-trade Concentrates: % Value 2019-2023

Table 71 - LBN Brand Shares of Off-trade Concentrates: % Value 2020-2023

Table 72 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2019-2023

Table 73 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2020-2023

Table 74 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2023-2028

Table 75 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2023-2028

Table 76 - Forecast Off-trade Sales of Concentrates by Category: Value 2023-2028

Table 77 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2023-2028

Juice in Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Removal of tax positively impacts juice sales

Jafora-Tabori Ltd retains lead

Advertising campaigns employ local actors

PROSPECTS AND OPPORTUNITIES

Market to return to decline

100% juice to face challenges

Green Lantern to purchase Priniv

CATEGORY DATA

Table 78 - Off-trade Sales of Juice by Category: Volume 2018-2023

- Table 79 - Off-trade Sales of Juice by Category: Value 2018-2023
- Table 80 - Off-trade Sales of Juice by Category: % Volume Growth 2018-2023
- Table 81 - Off-trade Sales of Juice by Category: % Value Growth 2018-2023
- Table 82 - NBO Company Shares of Off-trade Juice: % Volume 2019-2023
- Table 83 - LBN Brand Shares of Off-trade Juice: % Volume 2020-2023
- Table 84 - NBO Company Shares of Off-trade Juice: % Value 2019-2023
- Table 85 - LBN Brand Shares of Off-trade Juice: % Value 2020-2023
- Table 86 - Forecast Off-trade Sales of Juice by Category: Volume 2023-2028
- Table 87 - Forecast Off-trade Sales of Juice by Category: Value 2023-2028
- Table 88 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2023-2028
- Table 89 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2023-2028

RTD Coffee in Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Private label enters the RTD coffee category
- Tnuva's launch pushes market growth
- New launch by Tnuva and Strauss

PROSPECTS AND OPPORTUNITIES

- Prices to rise early in forecast period
- More launches expected
- Master Café faces growing competition

CATEGORY DATA

- Table 90 - Off-trade Sales of RTD Coffee: Volume 2018-2023
- Table 91 - Off-trade Sales of RTD Coffee: Value 2018-2023
- Table 92 - Off-trade Sales of RTD Coffee: % Volume Growth 2018-2023
- Table 93 - Off-trade Sales of RTD Coffee: % Value Growth 2018-2023
- Table 94 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2019-2023
- Table 95 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2020-2023
- Table 96 - NBO Company Shares of Off-trade RTD Coffee: % Value 2019-2023
- Table 97 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2020-2023
- Table 98 - Forecast Off-trade Sales of RTD Coffee: Volume 2023-2028
- Table 99 - Forecast Off-trade Sales of RTD Coffee: Value 2023-2028
- Table 100 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2023-2028
- Table 101 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2023-2028

RTD Tea in Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Sweetened beverages tax removed
- Health and wellness trend undermines demand
- Fuze Tea advertising and getting customers involved

PROSPECTS AND OPPORTUNITIES

- Government pushback from price rises
- Coca-Cola fined millions of shekels
- Shift to healthier beverages to continue over the forecast period

CATEGORY DATA

Table 102 - Off-trade Sales of RTD Tea by Category: Volume 2018-2023

Table 103 - Off-trade Sales of RTD Tea by Category: Value 2018-2023

Table 104 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2018-2023

Table 105 - Off-trade Sales of RTD Tea by Category: % Value Growth 2018-2023

Table 106 - Leading Flavours for Off-trade RTD Tea: % Volume 2018-2023

Table 107 - NBO Company Shares of Off-trade RTD Tea: % Volume 2019-2023

Table 108 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2020-2023

Table 109 - NBO Company Shares of Off-trade RTD Tea: % Value 2019-2023

Table 110 - LBN Brand Shares of Off-trade RTD Tea: % Value 2020-2023

Table 111 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2023-2028

Table 112 - Forecast Off-trade Sales of RTD Tea by Category: Value 2023-2028

Table 113 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2023-2028

Table 114 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2023-2028

Energy Drinks in Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Prime enters the market

Challenges include changing tastes and health concerns

Removal of tax boosts sales

PROSPECTS AND OPPORTUNITIES

Removal of tax pushes market forward

Reduced sugar to continue to post strong growth

Uncertainty in the market

CATEGORY DATA

Table 115 - Off-trade Sales of Energy Drinks: Volume 2018-2023

Table 116 - Off-trade Sales of Energy Drinks: Value 2018-2023

Table 117 - Off-trade Sales of Energy Drinks: % Volume Growth 2018-2023

Table 118 - Off-trade Sales of Energy Drinks: % Value Growth 2018-2023

Table 119 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2019-2023

Table 120 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2020-2023

Table 121 - NBO Company Shares of Off-trade Energy Drinks: % Value 2019-2023

Table 122 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2020-2023

Table 123 - Forecast Off-trade Sales of Energy Drinks: Volume 2023-2028

Table 124 - Forecast Off-trade Sales of Energy Drinks: Value 2023-2028

Table 125 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2023-2028

Table 126 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2023-2028

Sports Drinks in Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Tax removed

Continued growth for retail e-commerce

Powerade Zero fails to have major impact

PROSPECTS AND OPPORTUNITIES

High prices to dampen demand

Increasing participation in sports and regular exercise to boost sales

Protein trend

CATEGORY DATA

Table 127 - Off-trade Sales of Sports Drinks: Volume 2018-2023

Table 128 - Off-trade Sales of Sports Drinks: Value 2018-2023

Table 129 - Off-trade Sales of Sports Drinks: % Volume Growth 2018-2023

Table 130 - Off-trade Sales of Sports Drinks: % Value Growth 2018-2023

Table 131 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2019-2023

Table 132 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2020-2023

Table 133 - NBO Company Shares of Off-trade Sports Drinks: % Value 2019-2023

Table 134 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2020-2023

Table 135 - Forecast Off-trade Sales of Sports Drinks: Volume 2023-2028

Table 136 - Forecast Off-trade Sales of Sports Drinks: Value 2023-2028

Table 137 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2023-2028

Table 138 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2023-2028

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/soft-drinks-in-israel/report.