



Euromonitor
International

Consumer Foodservice in Israel

March 2026

Table of Contents

Consumer Foodservice in Israel

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

MARKET DATA

Table 1 - Units, Transactions and Value Sales in Consumer Foodservice 2020-2025

Table 2 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2020-2025

Table 3 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2025

Table 4 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2020-2025

Table 5 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2020-2025

Table 6 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2025

Table 7 - Sales in Consumer Foodservice by Location: % Foodservice Value 2020-2025

Table 8 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2020-2025

Table 9 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2025

Table 10 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2022-2025

Table 11 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2025

Table 12 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2025-2030

Table 13 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2025-2030

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Cafés/Bars in Israel

KEY DATA FINDINGS

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
Independent café/bars remain prevalent due to unique locally owned venues

CATEGORY DATA

- Table 14 - Cafés/Bars by Category: Units/Outlets 2020-2025
- Table 15 - Sales in Cafés/Bars by Category: Number of Transactions 2020-2025
- Table 16 - Sales in Cafés/Bars by Category: Foodservice Value 2020-2025
- Table 17 - Cafés/Bars by Category: % Units/Outlets Growth 2020-2025
- Table 18 - Sales in Cafés/Bars by Category: % Transaction Growth 2020-2025
- Table 19 - Sales in Cafés/Bars by Category: % Foodservice Value Growth 2020-2025
- Table 20 - GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2021-2025
- Table 21 - GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2022-2025
- Table 22 - Forecast Cafés/Bars by Category: Units/Outlets 2025-2030
- Table 23 - Forecast Sales in Cafés/Bars by Category: Number of Transactions 2025-2030
- Table 24 - Forecast Sales in Cafés/Bars by Category: Foodservice Value 2025-2030
- Table 25 - Forecast Cafés/Bars by Category: % Units/Outlets Growth 2025-2030
- Table 26 - Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2025-2030
- Table 27 - Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2025-2030

DISCLAIMER

[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

Japanika leads full-service restaurants due to rise of Asian cuisine
Japanese cuisine wave is aiding in growth of Japan Japan
Independent full-service restaurants remain relevant due to deep-rooted local communities

CATEGORY DATA

- Table 28 - Full-Service Restaurants by Category: Units/Outlets 2020-2025

Table 29 - Sales in Full-Service Restaurants by Category: Number of Transactions 2020-2025

Table 30 - Sales in Full-Service Restaurants by Category: Foodservice Value 2020-2025

Table 31 - Full-Service Restaurants by Category: % Units/Outlets Growth 2020-2025

Table 32 - Sales in Full-Service Restaurants by Category: % Transaction Growth 2020-2025

Table 33 - Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2020-2025

Table 34 - GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2021-2025

Table 35 - GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2022-2025

Table 36 - Forecast Full-Service Restaurants by Category: Units/Outlets 2025-2030

Table 37 - Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2025-2030

Table 38 - Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2025-2030

Table 39 - Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2025-2030

Table 40 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2025-2030

Table 41 - Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2025-2030

DISCLAIMER

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

Pizza Hut remains leader in pizza limited-service category with extensive network of branches

Pizza Story is capitalising on delivery service growth and comfort food trend

Independent restaurants to remain popular due to flexibility and business agility

CATEGORY DATA

Table 42 - Limited-Service Restaurants by Category: Units/Outlets 2020-2025

Table 43 - Sales in Limited-Service Restaurants by Category: Number of Transactions 2020-2025

Table 44 - Sales in Limited-Service Restaurants by Category: Foodservice Value 2020-2025

Table 45 - Limited-Service Restaurants by Category: % Units/Outlets Growth 2020-2025

Table 46 - Sales in Limited-Service Restaurants by Category: % Transaction Growth 2020-2025

Table 47 - Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2020-2025

Table 48 - GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2021-2025

Table 49 - GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2022-2025

Table 50 - Forecast Limited-Service Restaurants by Category: Units/Outlets 2025-2030

Table 51 - Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2025-2030

Table 52 - Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2025-2030

Table 53 - Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2025-2030

Table 54 - Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2025-2030

Table 55 - Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2025-2030

DISCLAIMER

Self-Service Cafeterias in Israel

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

CATEGORY DATA

Table 56 - Self-Service Cafeterias: Units/Outlets 2020-2025

Table 57 - Sales in Self-Service Cafeterias: Number of Transactions 2020-2025

Table 58 - Sales in Self-Service Cafeterias: Foodservice Value 2020-2025

Table 59 - Sales in Self-Service Cafeterias: % Units/Outlets Growth 2020-2025

Table 60 - Sales in Self-Service Cafeterias: % Transaction Growth 2020-2025

Table 61 - Sales in Self-Service Cafeterias: % Foodservice Value Growth 2020-2025

Table 62 - GBO Company Shares in Chained Self-Service Cafeterias: % Foodservice Value 2021-2025

Table 63 - GBN Brand Shares in Chained Self-Service Cafeterias: % Foodservice Value 2022-2025

Table 64 - Forecast Self-Service Cafeterias: Units/Outlets 2025-2030

Table 65 - Forecast Sales in Self-Service Cafeterias: Number of Transactions 2025-2030

Table 66 - Forecast Sales in Self-Service Cafeterias: Foodservice Value 2025-2030

Table 67 - Forecast Self-Service Cafeterias: % Units/Outlets Growth 2025-2030

Table 68 - Forecast Sales in Self-Service Cafeterias: % Transaction Growth 2025-2030

Table 69 - Forecast Sales in Self-Service Cafeterias: % Foodservice Value Growth 2025-2030

DISCLAIMER

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

re:bar leads due to its strong brand presence

re:bar's growth is attributed to its continuous menu innovation and digital capabilities

Independent street stall/kiosks remain substantial due to consumer preference for authentic cuisine

CATEGORY DATA

Table 70 - Street Stalls/Kiosks: Units/Outlets 2020-2025

Table 71 - Sales in Street Stalls/Kiosks: Number of Transactions 2020-2025

Table 72 - Sales in Street Stalls/Kiosks: Foodservice Value 2020-2025

Table 73 - Street Stalls/Kiosks: % Units/Outlets Growth 2020-2025

Table 74 - Sales in Street Stalls/Kiosks: % Transaction Growth 2020-2025

Table 75 - Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2020-2025

Table 76 - GBO Company Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2021-2025

Table 77 - GBN Brand Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2022-2025

Table 78 - Forecast Street Stalls/Kiosks: Units/Outlets 2025-2030

Table 79 - Forecast Sales in Street Stalls/Kiosks: Number of Transactions 2025-2030

Table 80 - Forecast Sales in Street Stalls/Kiosks: Foodservice Value 2025-2030

Table 81 - Forecast Street Stalls/Kiosks: % Units/Outlets Growth 2025-2030

Table 82 - Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2025-2030

Table 83 - Forecast Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2025-2030

DISCLAIMER

Consumer Foodservice By Location in Israel

KEY DATA FINDINGS

2025 DEVELOPMENTS

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?

Retail consumer foodservice is expected to drive growth through accessibility

Future of standalone consumer foodservice remains uncertain

Rising cost of living is affecting consumer foodservices growth

CATEGORY DATA

Table 84 - Consumer Foodservice by Location: Units/Outlets 2020-2025

Table 85 - Sales in Consumer Foodservice by Location: Number of Transactions 2020-2025

Table 86 - Sales in Consumer Foodservice by Location: Foodservice Value 2020-2025

Table 87 - Consumer Foodservice by Location: % Units/Outlets Growth 2020-2025

Table 88 - Sales in Consumer Foodservice by Location: % Transaction Growth 2020-2025

Table 89 - Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2020-2025

Table 90 - Consumer Foodservice Through Standalone: Units/Outlets 2020-2025

Table 91 - Sales in Consumer Foodservice Through Standalone: Number of Transactions 2020-2025

Table 92 - Sales in Consumer Foodservice Through Standalone: Foodservice Value 2020-2025

Table 93 - Consumer Foodservice Through Standalone: % Units/Outlets Growth 2020-2025

Table 94 - Sales in Consumer Foodservice Through Standalone: % Transaction Growth 2020-2025

Table 95 - Sales in Consumer Foodservice Through Standalone: % Foodservice Value Growth 2020-2025

Table 96 - Consumer Foodservice Through Leisure: Units/Outlets 2020-2025

Table 97 - Sales in Consumer Foodservice Through Leisure: Number of Transactions 2020-2025

Table 98 - Sales in Consumer Foodservice Through Leisure: Foodservice Value 2020-2025

Table 99 - Consumer Foodservice Through Leisure: % Units/Outlets Growth 2020-2025

Table 100 - Sales in Consumer Foodservice Through Leisure: % Transaction Growth 2020-2025

Table 101 - Sales in Consumer Foodservice Through Leisure: % Foodservice Value Growth 2020-2025

Table 102 - Consumer Foodservice Through Retail: Units/Outlets 2020-2025

Table 103 - Sales in Consumer Foodservice Through Retail: Number of Transactions 2020-2025

Table 104 - Sales in Consumer Foodservice Through Retail: Foodservice Value 2020-2025

Table 105 - Consumer Foodservice Through Retail: % Units/Outlets Growth 2020-2025

Table 106 - Sales in Consumer Foodservice Through Retail: % Transaction Growth 2020-2025

Table 107 - Sales in Consumer Foodservice Through Retail: % Foodservice Value Growth 2020-2025

Table 108 - Consumer Foodservice Through Lodging: Units/Outlets 2020-2025

Table 109 - Sales in Consumer Foodservice Through Lodging: Number of Transactions 2020-2025

Table 110 - Sales in Consumer Foodservice Through Lodging: Foodservice Value 2020-2025

Table 111 - Consumer Foodservice Through Lodging: % Units/Outlets Growth 2020-2025

Table 112 - Sales in Consumer Foodservice Through Lodging: % Transaction Growth 2020-2025

Table 113 - Sales in Consumer Foodservice Through Lodging: % Foodservice Value Growth 2020-2025

Table 114 - Consumer Foodservice Through Travel: Units/Outlets 2020-2025

Table 115 - Sales in Consumer Foodservice Through Travel: Number of Transactions 2020-2025

Table 116 - Sales in Consumer Foodservice Through Travel: Foodservice Value 2020-2025

Table 117 - Consumer Foodservice Through Travel: % Units/Outlets Growth 2020-2025

Table 118 - Sales in Consumer Foodservice Through Travel: % Transaction Growth 2020-2025

Table 119 - Sales in Consumer Foodservice Through Travel: % Foodservice Value Growth 2020-2025

Table 120 - Forecast Consumer Foodservice by Location: Units/Outlets 2025-2030

Table 121 - Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2025-2030

Table 122 - Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2025-2030

Table 123 - Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2025-2030

Table 124 - Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2025-2030

Table 125 - Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2025-2030

Table 126 - Forecast Consumer Foodservice Through Standalone: Units/Outlets 2025-2030

Table 127 - Forecast Sales in Consumer Foodservice Through Standalone: Number of Transactions 2025-2030

Table 128 - Forecast Sales in Consumer Foodservice Through Standalone: Foodservice Value 2025-2030

Table 129 - Forecast Consumer Foodservice Through Standalone: % Units/Outlets Growth 2025-2030

Table 130 - Forecast Sales in Consumer Foodservice Through Standalone: % Transaction Growth 2025-2030

Table 131 - Forecast Sales in Consumer Foodservice Through Standalone: % Foodservice Value Growth 2025-2030

Table 132 - Forecast Consumer Foodservice Through Leisure: Units/Outlets 2025-2030

Table 133 - Forecast Sales in Consumer Foodservice Through Leisure: Number of Transactions 2025-2030

Table 134 - Forecast Sales in Consumer Foodservice Through Leisure: Foodservice Value 2025-2030

Table 135 - Forecast Consumer Foodservice Through Leisure: % Units/Outlets Growth 2025-2030

Table 136 - Forecast Sales in Consumer Foodservice Through Leisure: % Transaction Growth 2025-2030

Table 137 - Forecast Sales in Consumer Foodservice Through Leisure: % Foodservice Value Growth 2025-2030

Table 138 - Forecast Consumer Foodservice Through Retail: Units/Outlets 2025-2030

Table 139 - Forecast Sales in Consumer Foodservice Through Retail: Number of Transactions 2025-2030

Table 140 - Forecast Sales in Consumer Foodservice Through Retail: Foodservice Value 2025-2030

Table 141 - Forecast Consumer Foodservice Through Retail: % Units/Outlets Growth 2025-2030

Table 142 - Forecast Sales in Consumer Foodservice Through Retail: % Transaction Growth 2025-2030

Table 143 - Forecast Sales in Consumer Foodservice Through Retail: % Foodservice Value Growth 2025-2030

Table 144 - Forecast Consumer Foodservice Through Lodging: Units/Outlets 2025-2030

Table 145 - Forecast Sales in Consumer Foodservice Through Lodging: Number of Transactions 2025-2030

Table 146 - Forecast Sales in Consumer Foodservice Through Lodging: Foodservice Value 2025-2030

Table 147 - Forecast Consumer Foodservice Through Lodging: % Units/Outlets Growth 2025-2030

Table 148 - Forecast Sales in Consumer Foodservice Through Lodging: % Transaction Growth 2025-2030

Table 149 - Forecast Sales in Consumer Foodservice Through Lodging: % Foodservice Value Growth 2025-2030

Table 150 - Forecast Consumer Foodservice Through Travel: Units/Outlets 2025-2030

Table 151 - Forecast Sales in Consumer Foodservice Through Travel: Number of Transactions 2025-2030

Table 152 - Forecast Sales in Consumer Foodservice Through Travel: Foodservice Value 2025-2030

Table 153 - Forecast Consumer Foodservice Through Travel: % Units/Outlets Growth 2025-2030

Table 154 - Forecast Sales in Consumer Foodservice Through Travel: % Transaction Growth 2025-2030

Table 155 - Forecast Sales in Consumer Foodservice Through Travel: % Foodservice Value Growth 2025-2030

DISCLAIMER

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.