



Processed Fruit and Vegetables in Israel

November 2025

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Processed Fruit and Vegetables in Israel - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Current value growth slows as pricing pressures recede slightly

INDUSTRY PERFORMANCE

Frozen fruit is the fastest developing category

Demand for shelf stable fruit and frozen processed potatoes declines

WHAT'S NEXT?

Outlook for processed fruit and vegetables is generally positive

Rising health awareness will continue to shape consumer choices

Price competition likely to intensify as import reforms attract new entrants

COMPETITIVE LANDSCAPE

Tnuva Food Industries Ltd retains substantial overall lead

Strauss Group Ltd is the most dynamic company in value growth terms

CHANNELS

Distribution still concentrated in discounters

E-commerce is the best performing distribution channel

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Staple Foods in Israel - Industry Overview

EXECUTIVE SUMMARY

Staple foods shows a broadly resilient performance in 2025

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INDUSTRY PERFORMANCE

Efficacy of import reform policy muted by Red Sea security crisis

Health and wellness trend continues to gain momentum

Foodservice volume sales rebound strongly

WHAT'S NEXT?

Outlook for staple foods is bright on the whole

Rising health-consciousness will remain a key driver of innovation

COMPETITIVE LANDSCAPE

Osem Food Industries Ltd retains the overall lead in 2025

Sanlakol Ltd is the most dynamic player in terms of total value sales growth

CHANNELS

Discounters remains the leading distribution channel

E-commerce gains the most ground of any channel

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