



# 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](http://www.euromonitor.com/soft-drinks-in-israel/report).