

Alcoholic Drinks in Israel

June 2023

Table of Contents

Alcoholic Drinks in Israel

EXECUTIVE SUMMARY

Alcoholic drinks in 2022: The big picture

2022 key trends

Competitive landscape

Retailing developments

On-trade vs off-trade split

What next for alcoholic drinks?

MARKET BACKGROUND

Legislation

Legal purchasing age and legal drinking age

Drink driving

Advertising

Smoking ban

Opening hours

On-trade establishments

Table 1 - Number of On-trade Establishments by Type 2016-2022

TAXATION AND DUTY LEVIES

Summary 1 - Taxation and Duty Levies on Alcoholic Drinks 2022

OPERATING ENVIRONMENT

Contraband/parallel trade

Duty free

Cross-border/private imports

KEY NEW PRODUCT LAUNCHES

Outlook

MARKET INDICATORS

Table 2 - Retail Consumer Expenditure on Alcoholic Drinks 2017-2022

MARKET DATA

- Table 3 Sales of Alcoholic Drinks by Category: Total Volume 2017-2022
- Table 4 Sales of Alcoholic Drinks by Category: Total Value 2017-2022
- Table 5 Sales of Alcoholic Drinks by Category: % Total Volume Growth 2017-2022
- Table 6 Sales of Alcoholic Drinks by Category: % Total Value Growth 2017-2022
- Table 7 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2022
- Table 8 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2022
- Table 9 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2022
- Table 10 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2022
- Table 11 GBO Company Shares of Alcoholic Drinks: % Total Volume 2018-2022
- Table 12 Distribution of Alcoholic Drinks by Format: % Off-trade Value 2017-2022
- Table 13 Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2022
- Table 14 Forecast Sales of Alcoholic Drinks by Category: Total Volume 2022-2027
- Table 15 Forecast Sales of Alcoholic Drinks by Category: Total Value 2022-2027
- Table 16 Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2022-2027
- Table 17 Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2022-2027

DISCLAIMER

SOURCES

Beer in Israel

KEY DATA FINDINGS

2022 DEVELOPMENTS

Unit prices increase as players seek to recover their own additional costs due to inflationary pressures

Goldstar launches a nostalgic beer in a special limited-edition

Discounter Carrefour adds a selection of beers to its offerings

PROSPECTS AND OPPORTUNITIES

Unit price will continue to rise due to the inflationary context

Ale continues to prove popular, with new flavours launched to meet growing trends

Health and wellness trends reach beer with the launch of low-alcohol, gluten-free, low-calorie Skinny Beer Lager

CATEGORY BACKGROUND

Lager price band methodology

Summary 3 - Lager by Price Band 2022

CATEGORY DATA

Table 18 - Sales of Beer by Category: Total Volume 2017-2022

Table 19 - Sales of Beer by Category: Total Value 2017-2022

Table 20 - Sales of Beer by Category: % Total Volume Growth 2017-2022

Table 21 - Sales of Beer by Category: % Total Value Growth 2017-2022

Table 22 - Sales of Beer by Off-trade vs On-trade: Volume 2017-2022

Table 23 - Sales of Beer by Off-trade vs On-trade: Value 2017-2022

Table 24 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2017-2022

Table 25 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2017-2022

Table 26 - Sales of Beer by Craft vs Standard 2017-2022

Table 27 - GBO Company Shares of Beer: % Total Volume 2018-2022

Table 28 - NBO Company Shares of Beer: % Total Volume 2018-2022

Table 29 - LBN Brand Shares of Beer: % Total Volume 2019-2022

Table 30 - Forecast Sales of Beer by Category: Total Volume 2022-2027

Table 31 - Forecast Sales of Beer by Category: Total Value 2022-2027

Table 32 - Forecast Sales of Beer by Category: % Total Volume Growth 2022-2027

Table 33 - Forecast Sales of Beer by Category: % Total Value Growth 2022-2027

Cider/Perry in Israel

KEY DATA FINDINGS

2022 DEVELOPMENTS

Lack of innovation in cider/perry suppresses potential growth

Cider/perry also affected by rising costs and unit prices

Major players retain their positions, with Tempo Beer Industries pipping Israel Breweries to the post

PROSPECTS AND OPPORTUNITIES

Popularity of RTDs and cocktails will continue to hinder sales

Unit price increases will continue to impact sales – especially with no new product developments expected to add novelty or value On-trade has ongoing potential to recover and help boost overall sales

CATEGORY DATA

Table 34 - Sales of Cider/Perry: Total Volume 2017-2022

Table 35 - Sales of Cider/Perry: Total Value 2017-2022

- Table 36 Sales of Cider/Perry: % Total Volume Growth 2017-2022
- Table 37 Sales of Cider/Perry: % Total Value Growth 2017-2022
- Table 38 Sales of Cider/Perry by Off-trade vs On-trade: Volume 2017-2022
- Table 39 Sales of Cider/Perry by Off-trade vs On-trade: Value 2017-2022
- Table 40 Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2017-2022
- Table 41 Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2017-2022
- Table 42 GBO Company Shares of Cider/Perry: % Total Volume 2018-2022
- Table 43 NBO Company Shares of Cider/Perry: % Total Volume 2018-2022
- Table 44 LBN Brand Shares of Cider/Perry: % Total Volume 2019-2022
- Table 45 Forecast Sales of Cider/Perry: Total Volume 2022-2027
- Table 46 Forecast Sales of Cider/Perry: Total Value 2022-2027
- Table 47 Forecast Sales of Cider/Perry: % Total Volume Growth 2022-2027
- Table 48 Forecast Sales of Cider/Perry: % Total Value Growth 2022-2027

Rtds in Israel

KEY DATA FINDINGS

2022 DEVELOPMENTS

Cocktail trend continues to benefit RTDs

Shortage of gin stimulates ongoing interest in RTDs

Economic uncertainty could benefit sales of RTDs over other, more expensive, alcoholic drinks

PROSPECTS AND OPPORTUNITIES

Ongoing shortages in gin and budget-conscious consumers likely to continue benefiting RTDs Ongoing new product launches expected due to growing popularity – including in can formats Hard seltzers could also help to support volume growth

CATEGORY DATA

- Table 49 Sales of RTDs by Category: Total Volume 2017-2022
- Table 50 Sales of RTDs by Category: Total Value 2017-2022
- Table 51 Sales of RTDs by Category: % Total Volume Growth 2017-2022
- Table 52 Sales of RTDs by Category: % Total Value Growth 2017-2022
- Table 53 Sales of RTDs by Off-trade vs On-trade: Volume 2017-2022
- Table 54 Sales of RTDs by Off-trade vs On-trade: Value 2017-2022
- Table 55 Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2017-2022
- Table 56 Sales of RTDs by Off-trade vs On-trade: % Value Growth 2017-2022
- Table 57 GBO Company Shares of RTDs: % Total Volume 2018-2022 Table 58 NBO Company Shares of RTDs: % Total Volume 2018-2022
- Table 59 LBN Brand Shares of RTDs: % Total Volume 2019-2022
- Table 60 Forecast Sales of RTDs by Category: Total Volume 2022-2027
- Table 61 Forecast Sales of RTDs by Category: Total Value 2022-2027
- Table 62 Forecast Sales of RTDs by Category: % Total Volume Growth 2022-2027
- Table 63 Forecast Sales of RTDs by Category: % Total Value Growth 2022-2027

Spirits in Israel

KEY DATA FINDINGS

2022 DEVELOPMENTS

Premiumisation trend at increase in at-home consumption support sales in spirits Spirits also sees hikes in unit prices, albeit premium products remain popular Glass bottle shortages and contraband create challenges for spirits players

PROSPECTS AND OPPORTUNITIES

Ongoing inflation and budget-conscious consumers likely to suppress potential sales

In a polarised trend: premiumisation and new flavours will product developments

Tequila will continue to benefit from the cocktail trend, with tight competition between Y Caspi and M Ackerman

CATEGORY BACKGROUND

Vodka, gin, other blended Scotch whisky, dark rum and white rum price band methodology

Summary 4 - Benchmark Brands 2022

CATEGORY DATA

- Table 64 Sales of Spirits by Category: Total Volume 2017-2022
- Table 65 Sales of Spirits by Category: Total Value 2017-2022
- Table 66 Sales of Spirits by Category: % Total Volume Growth 2017-2022
- Table 67 Sales of Spirits by Category: % Total Value Growth 2017-2022
- Table 68 Sales of Spirits by Off-trade vs On-trade: Volume 2017-2022
- Table 69 Sales of Spirits by Off-trade vs On-trade: Value 2017-2022
- Table 70 Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2017-2022
- Table 71 Sales of Spirits by Off-trade vs On-trade: % Value Growth 2017-2022
- Table 72 Sales of Dark Rum by Price Platform: % Total Volume 2017-2022
- Table 73 Sales of White Rum by Price Platform: % Total Volume 2017-2022
- Table 74 Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2017-2022
- Table 75 Sales of English Gin by Price Platform: % Total Volume 2017-2022
- Table 76 Sales of Vodka by Price Platform: % Total Volume 2017-2022
- Table 77 Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2017-2022
- Table 78 GBO Company Shares of Spirits: % Total Volume 2018-2022
- Table 79 NBO Company Shares of Spirits: % Total Volume 2018-2022
- Table 80 LBN Brand Shares of Spirits: % Total Volume 2019-2022
- Table 81 Forecast Sales of Spirits by Category: Total Volume 2022-2027
- Table 82 Forecast Sales of Spirits by Category: Total Value 2022-2027
- Table 83 Forecast Sales of Spirits by Category: % Total Volume Growth 2022-2027
- Table 84 Forecast Sales of Spirits by Category: % Total Value Growth 2022-2027

Wine in Israel

KEY DATA FINDINGS

2022 DEVELOPMENTS

Premiumisation trends continue in wine

Discounter Osher Ad launches premium wines at affordable prices to meet demand

Champagne enjoys ongoing growth thanks to being a status symbol of luxury

PROSPECTS AND OPPORTUNITIES

Unit prices will continue to rise due to the inflationary context

Wine stores start to offer indoor seating where customers can enjoy their wares

Wine from Morocco could be the next big trend, following the 2020 Abraham Accords agreement

CATEGORY DATA

- Table 85 Sales of Wine by Category: Total Volume 2017-2022
- Table 86 Sales of Wine by Category: Total Value 2017-2022
- Table 87 Sales of Wine by Category: % Total Volume Growth 2017-2022
- Table 88 Sales of Wine by Category: % Total Value Growth 2017-2022
- Table 89 Sales of Wine by Off-trade vs On-trade: Volume 2017-2022
- Table 90 Sales of Wine by Off-trade vs On-trade: Value 2017-2022

- Table 91 Sales of Wine by Off-trade vs On-trade: % Volume Growth 2017-2022
- Table 92 Sales of Wine by Off-trade vs On-trade: % Value Growth 2017-2022
- Table 93 Sales of Still Red Wine by Price Segment: % Off-trade Volume 2017-2022
- Table 94 Sales of Still Rosé Wine by Price Segment: % Off-trade Volume 2017-2022
- Table 95 Sales of Still White Wine by Price Segment: % Off-trade Volume 2017-2022
- Table 96 Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2017-2022
- Table 97 GBO Company Shares of Still Light Grape Wine: % Total Volume 2018-2022
- Table 98 NBO Company Shares of Still Light Grape Wine: % Total Volume 2018-2022
- Table 99 LBN Brand Shares of Still Light Grape Wine: % Total Volume 2019-2022
- Table 100 GBO Company Shares of Champagne: % Total Volume 2018-2022
- Table 101 NBO Company Shares of Champagne: % Total Volume 2018-2022
- Table 102 LBN Brand Shares of Champagne: % Total Volume 2019-2022
- Table 103 GBO Company Shares of Other Sparkling Wine: % Total Volume 2018-2022
- Table 104 NBO Company Shares of Other Sparkling Wine: % Total Volume 2018-2022
- Table 105 LBN Brand Shares of Other Sparkling Wine: % Total Volume 2019-2022
- Table 106 GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2018-2022
- Table 107 NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2018-2022
- Table 108 LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2019-2022
- Table 109 Forecast Sales of Wine by Category: Total Volume 2022-2027
- Table 110 Forecast Sales of Wine by Category: Total Value 2022-2027
- Table 111 Forecast Sales of Wine by Category: % Total Volume Growth 2022-2027
- Table 112 Forecast Sales of Wine by Category: % Total Value Growth 2022-2027

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 focusing 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/alcoholic-drinks-in-israel/report.