United States Department of Agriculture
Foreign Agricultural Service

GAIN
Global Agricultural Information Network

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Report Highlights:

Israel is a net importer of all major categories of food products. The Israeli food retail sector was estimated to be $20.7 billion in 2023, and during the same year, Israel imported around $4.96 million of consumer-oriented products. However, towards the end of 2023, consumer-oriented agricultural imports slightly decreased because of a disruption in shipping due to Houthi attacks on vessels in the Red Sea. With the ongoing regional conflict, Israeli preferences for consumer-oriented food products have changed to match their changing lifestyle. While many consumers are very price sensitive, others are willing to pay a premium for high quality products. However, as prices remain high, the Israeli government continues to reform its food legislation in efforts to reduce prices and streamline imports.

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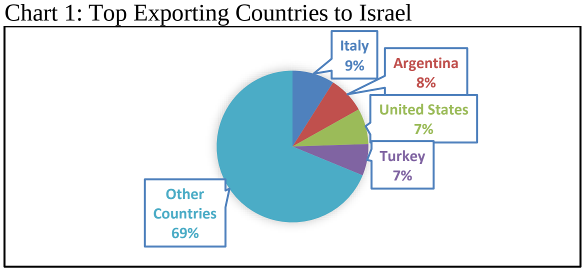
Executive Summary:
Israel is a technologically advanced, market-oriented economy. In 2023, Israel's annual GDP reached $462 billion. According to Israel's Central Bank, Israel's GDP grew by 2 percent in 2023, but is expected to have a slower growth of 1.5 percent in 2024, rebounding to 4.2 percent in 2025, if the Israel-Hamas conflict subsides. The inflation rate in September 2024 was 2.8 percent, but is expected to grow to 3.2 percent in 2024, partially due to taxation measures. In 2025, the inflation rate is expected to settle at 2.8 percent, if the conflict subsides.

Consumer-Oriented Agricultural Imports
Chart 1: Top Exporting Countries to Israel



Food Retail Industry:
Israeli food retail sales reached $20.7 billion in 2023, with 2 percent growth anticipated in 2024. The food retail market consists of supermarket chains, convenience stores, local grocery stores, and wet markets. The leading retail supermarkets in Israel are: Shufersal, Rami Levi and Merav-Mazon Kol/Osher Ad., which collectively have a revenue of $7.7 billion and represent 55 percent of Israel's top 24 food retail companies and annual revenues of $7.7 billion.

Food Processing Industry:
With more than 2,500 food processing facilities, the Israeli food processing sector is an important player in the domestic economy. Five groups dominate the local food processing industry: Tnuva, Osem-Nestlé, Strauss, Central Company for Beverages Distribution (Coca-Cola) and Soda Stream. In 2023, Israel imported $9.2 billion of food products, a large percentage of which were for its food processing industry. Almost all ingredients from horticultural sources are imported. In 2023, the annual revenue for Israel's largest food processors was $13.62 billion.

Food Service Industry:
Israeli food service sales reached $8.1 billion in 2023. However, after October 7, 2023, the food service industry suffered a severe drop in sales; with no growth forecasted for 2024. The expansion of sales is dependent upon the cessation of the conflict.

Quick Facts CY 2023

Imports of Consumer-Oriented Products*
$4.96 million (U.S. billion)

List of Top 10 Growth Products in Israel*

1) Dairy Products	2) Baked Goods, Cereals, Pasta
3) Chewing Gum & Candy	4) Beer
5) Non-Alcoholic Bev.	6) Chocolate & Cocoa Products
7) Eggs & Products	8) Dogs and Cat Food
9) Condiments & Sauces	10) Poultry Meat & Products

Food Industry by Channels (U.S. billion)

Retail Food Industry	$20.7
Food Service-HRI	$8.1
Food Processing	$13.62
Food and Agriculture Exports**	$8.6

Top 10 Host Country Retailers
Shufersal Ltd; Rami Levy Shivuk Hashikma Ltd; Merav-Mazon Kol/ Osher Ad; Yohananov M and Sons (1988) Ltd; Victory Supermarket Chain Ltd; Hazi Hinam; Cohen Machsanei Hashuk Ltd; Freshmarket Ltd (PAZ Oil Co Ltd); Tiv Taam Holdings; Keshet Tastes Ltd.
*2023 Carrefour entered Israel.

GDP/Population
Population *(millions)*: 9.921 (as of June 2024)
GDP *(billions USD)*: 462 (2023)
GDP per capita *(USD)*: 48,300 (2023)

***BICO HS6 2021 – Consumer Oriented Agricultural Total**
****Ag Sector Total**

Sources: Euromonitor, Bank of Israel, The World Factbook, TDM, Duns 100, Israeli Centras Bureau of Statistic (CBS), FAS Tel Aviv office research.
1. https://www.boi.org.il/roles/statistics/real-economic-activity/national-accounts/
2. https://www.boi.org.il/media/bixo1v0q/full-anuual2023.pdf
3.; 4. Duns100 (Hebrew Only)
5. Euromonitor

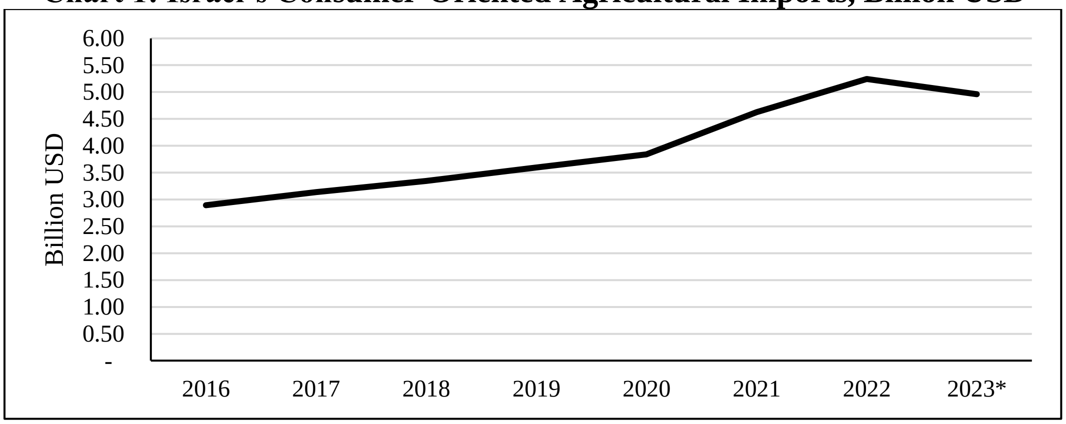
Strengths/Weaknesses/Opportunities/Threats

Strengths	***Weaknesses***
- Many markets are arguably well-known - U.S.-Israel Free Trade Agreement	- Different regulations from the United States - Geographical distance from the United States is considerable
Opportunities	***Threats***
- Increasing consumer demand - Availability of kosher products	- Adoption of EU regulations - A lot of competition in a highly branded market

Section 1: Market Summary

Israel is a net importer of all major categories of food products. Israel's limited land and water resources precludes a high level of agricultural self-sufficiency, which affects local production, costs, and consumer prices. The country posts sizeable trade deficits in food and agricultural products, importing large volumes of feed grains and sizable volumes of consumer-oriented products. In 2023, imports of agricultural products reached $9.29 billion, while exports reached only $2.71 billion.[1] In 2023, imports of consumer-oriented agricultural products totaled $4.96 billion. In 2023, consumer-oriented agricultural imports, slightly decreased due to the disruption in shipping because of the Houthi attacks on vessels in the Red Sea.

Chart 1: Israel's Consumer-Oriented Agricultural Imports, Billion USD



Source: Trade Data Monitor
**2023 – Imports interrupted after October 7, 2023, due to Israel-Hamas conflict and Houthi attacks on vessels in the Red Sea*

In 2023, fast-moving consumer goods (FMCG) sales in Israel reached $16.02 billion; approximately $12.9 billion was from food and beverages products.[2] Israeli food prices are 37 percent higher than the OECD average, and Israeli citizens spend more than 18 percent of their consumption expenditure on food and beverages.[3] A few large companies control most of the market, limiting competition and putting upward pressure on prices. As a result, the Government of Israel (GoI) is pursuing lower custom fees, increasing import quotas for specific food products, and implementing new regulations to promote competition in the sector and mitigate the high cost of living. As such, the GOI has been reforming its food legislation under the title "What is good for Europe is good for Israel," which will be implemented on January 1, 2025.

Israeli consumer-oriented agricultural imports preferences have changed in the last year due to lifestyle changes following the current conflict in the region. While many consumers are very price sensitive, others are willing to pay a premium for high quality products. The two main consumption styles are distinctively differed from each other—the first is purchases of luxury goods and the second is purchases of affordable goods. The conflict also influenced the current preference of consumers to purchase goods closer to home. All market channels showcase a similar increase the size of the average basket size, in comparison to 2022.

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[1] Note: HS code 1-24

[2] Storenext 2023Annual Summary , Average 2023 exchange rate

[3] State Comptroller Report - The cost of living, January 2024 (Hebrew only)

The wholesale and neighborhood channels are yet to fully recover from the decrease in size experienced in 2022. Wholesale channel leads in FMCG market value sales at 66.1 precent, while the neighborhood channel leads in Real Quantitative Growth (RQG) at 2.4 precent.[4] Large grocery retailers are expanding their reach by opening convenience stores which target urban customers by providing convenient shopping options closer to their homes or workplaces. On the other hand, small local grocers are implementing technology to enhance customer satisfaction and optimize their own operations.[5]

Advantages and Challenges

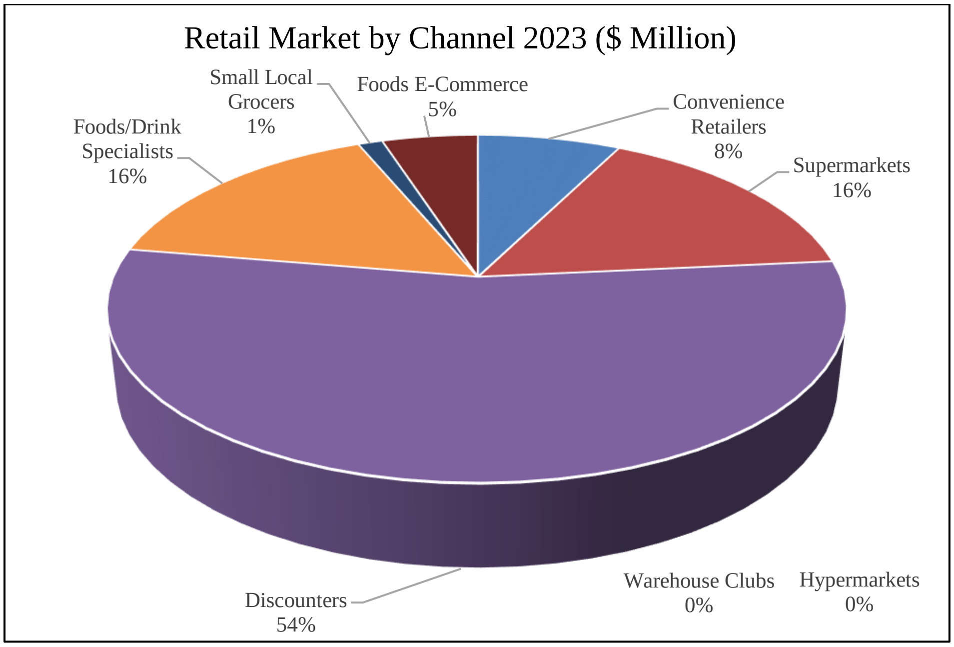
Table 1: U.S. Supplier's Advantages and Challenges Facing the Israeli Retail Food Sector

ADVANTAGES	CHALLENGES
U.S. products are known as being of high-quality.	Israel has adopted 40 EU standards, many of which are more restrictive than that the United States.
The Israeli market is high-end oriented, with high benchmark prices.	High-level kosher certification for their food products and restrictions on food ingredients.
Many Israelis have lived in the United States and are familiar with U.S. products and receptive to new and emerging products from the United States.	Israeli importers prefer to work directly with company export specialists, and not traders.
Israel is a small market, with a growing population, where logistics make it easy to promote goods across the entire country.	High shipping costs from the United States to Israel can be challenging.
Most importers are sophisticated and English speakers.	Low-cost competition from Europe and Asia.
Kosher products have a high market share in Israel - over 10,000 American companies produce kosher products.	Israeli buyers are less familiar with U.S. suppliers and producers.

[4] Storenext 2023Annual Summary , Average 2023 exchange rate
[5] Euromonitor International©

Retail Sales by Channel

Chart 2: Retail Market by Channel 2023



Source: Euromonitor International©

Section 2: Road Map for Market Entry

Entry Strategy

U.S. exporters should review [FAS Tel Aviv policy and market reports] and private sector analyses.

Find a Local Partner

Exporters should establish business relationships with reliable, experienced, and professional importers or distributers who will offer guidance on issues related to the product positioning, packaging, labeling, and custom clearance procedures. Face-to-face meetings also help build relationships and create opportunities to explore business opportunities firsthand.

Exporters that can supply sufficient quantities should consider approaching large Israeli food retail chains. Large supermarket chains have their own purchasing and importing divisions to handle food imports. U.S. suppliers should first contact the purchasing or importing divisions of these large food chains, especially for new-to-market food products as they have the most experience with branding and distribution. U.S. exporters should consider the price sensitivity of their customers, product requirements, purchasing policies, and purchase volumes.

Learn Regulations and Market Requirements

Israeli regulations, standards, and market requirements must be considered, especially kashrut or kosher certification. Certification is not a legal requirement for importing food into Israel (except for meat and meat products); however, non-kosher products have a smaller market, and most supermarkets and hotels refuse to carry them.

In August 2024, a significant reform in Israel's food regulation was enacted through the amendment of the Public Health Protection Law (Food). This reform, part of a broader government initiative to align Israeli regulations with European standards, aims to simplify the import process and improve food safety by adopting European Union regulations. The core principle "what is good for Europe is good for Israel," aims to have greater harmonization with European regulations to streamline food imports. The reform includes the European Track, which enables the importation of products adhering to EU standards without the need for additional Israeli certification.

Market Structure

There are three main retail food channels in Israel – supermarkets, convenience stores, and neighborhood grocers. In addition, there are wet markets that mostly sell fresh produce and other food and drink specialty shops.

Supermarkets

- In 2023, two large supermarket chains dominated the Israeli market, accounting for over forty percent of the market. The leading supermarket chains are: Shufersal, and Rami Levi.[6]
- Many of the supermarket chains operate in various formats. For instance, the supermarket chain Shufersal operates larger discounted stores in the outskirts of cities, while in the center of the cities, Shufersal operates smaller and more expensive neighborhood supermarkets or express supermarkets. For the Orthodox community, Shufersal operates ultra-Kosher larger discounted stores. Large supermarket facilities are generally located in the outskirts of the major cities near major highways, to service multiple geographic locations. Smaller neighborhood supermarkets located in cities tend to carry many of the same goods at higher prices.
- Most supermarkets are open only six days a week, with Friday as a short day (7 am – 2 pm) and Saturday being a mandatory day of rest. In recent years, supermarkets who target non-Orthodox customers such as Tiv Taam, Keshet Teamim, AM:PM, and StopMarket, etc. are open seven days a week.
- Large food retail chains have their own purchasing or importing division to handle food imports. Major supermarkets are now importing directly from foreign suppliers to reduce costs.

Convenience Stores

- Convenience stores are normally located on major thoroughfares or in gas stations, but those which are inside cities tend to cater to the local neighborhood residents (as parking may be difficult). Convenience stores within gas stations typically offer parking for commuting consumers. The top four gas companies in Israel operates over 750 convenience stores located in gas stations.[7]

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[6] Dun's 100 (Hebrew only)

[7] Globes (Hebrew only)

Neighborhood Grocers

- These small grocers offer a narrower product selection than supermarkets. Similarly, they have shorter hours then the supermarkets and convenience stores. Based on the latest estimates, there are more than 4,000 outlets.

Large supermarket chains import directly, as well as buy from importers or wholesalers. Others usually buy only through importers or wholesalers. In addition to large supermarket chains, (which import directly) there are about 2,291 importers, 19 precent of them are certified proper importers.

Company Profiles & Top Israeli Retailers

Israel's top food retailers have been ranked by two separate entities, BDi Code and DUN'S 100. See BDi Code's 2023 Supermarket Chains Rankings and DUN'S 100 2023 Food Retail Rankings.

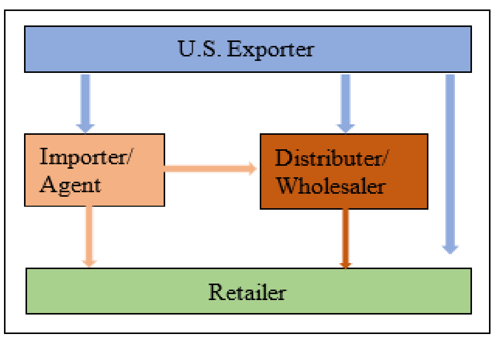
Import Procedures

The import process is categorized into sensitive and non-sensitive foods, each with specific documentation and inspection requirements. Sensitive foods, such as dairy, meat, and certain processed products, undergo rigorous testing and certification processes. Non-sensitive foods benefit from a more streamlined importation procedure. For procedures on specific commodities, exporters are advised to contact local importers or distributers.

Distribution Channels

While the use of an agent or distributor is not legally required, partnering with a local representative who has good industry contacts, proven reliability, loyalty, technical skills, and after-sales service capabilities is important for selling and maintaining a continued presence in Israel. U.S. companies need to be aggressive in their pursuit of business opportunities and maintain an active in-country presence.[8]

Chart 3: Distribution Channels

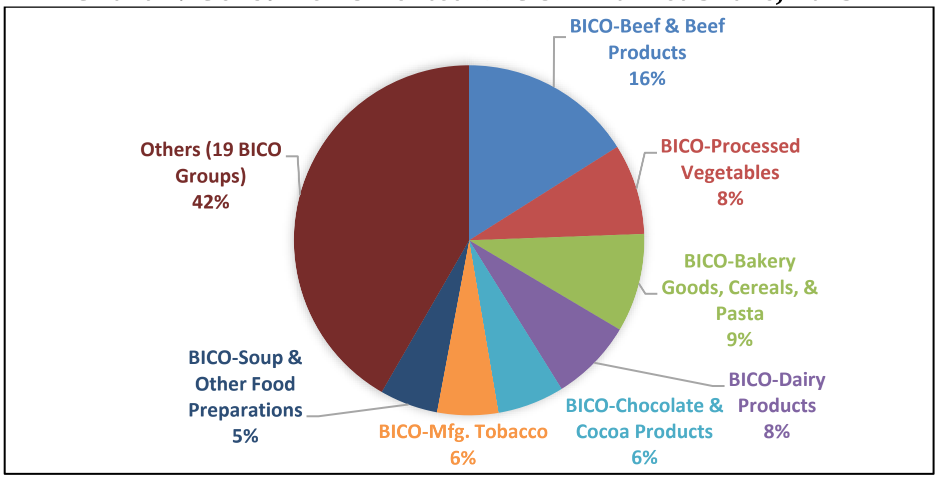


Source: FAS Tel-Aviv

[8] Distribution and sales channels

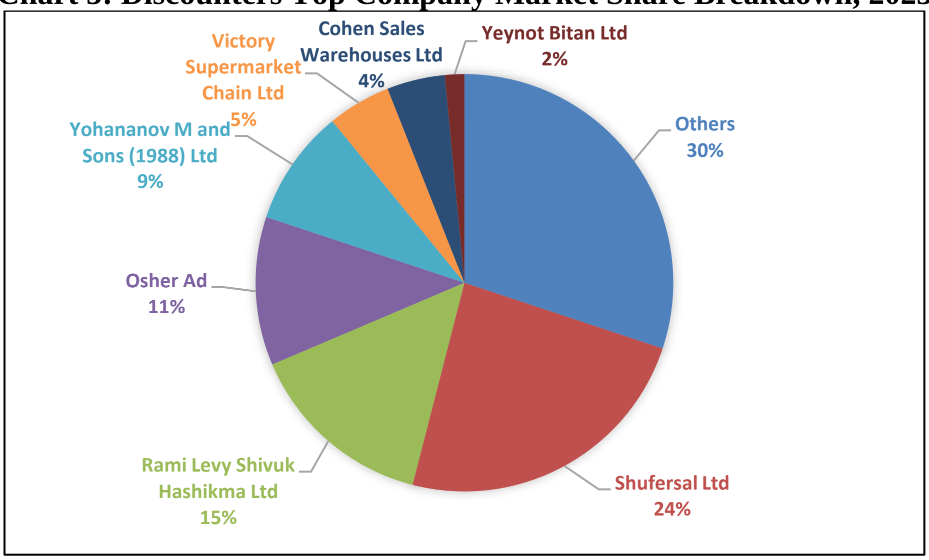
Share of Major Segments in the Retail Industry

Chart 4: Consumer Oriented BICO - Market Share, 2023



Source: Trad Data Monitor

Chart 5: Discounters Top Company Market Share Breakdown, 2023



Source: Euromonitor International©

Sector Trends[9]

Trends in Distribution Channels

Increasing Prices of FMCG - In May 2024, the Israeli Consumer Council informed the public of an average increase of six percent in a household shopping basket compared to the same period last year, while some other categories show an even higher increase. The following is a list of percentage increase in average product prices:

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[9] Israel Consumer Council , StoreNext 2023Annual Summary

Product	Percentage Change
Olive oil	35
Ketchup	20
Chocolate	17
Meat	15
Sugar	13
Cereals/Cornflakes	11
Frozen Fish	10
Sausages	10
Pasta sauce	10

While retailers around the world tend to absorb some of the country's inflation, retailers in Israel transfer this increase in prices to the end consumer, keeping their profit margins high and increasing their profit rate.[10]

Increasing Multi-Channels - Supermarket chains are increasing their activity and presence in the center of cities. In many cases, entering and procuring city retail space occurs through acquiring smaller chains or privately owned businesses. Convenience stores and neighborhood grocery stores adapted e-commerce and delivery platforms (for example Wolt). The same multi-channel trend can be found in local suppliers and distributors who previously sold directly to businesses and are now increasing their e-commerce and online platforms to reach consumers directly.

Increasing Single-Serve Products – Single-served/individual-sized products are on the rise, at the expense of family-sized packaged products. The wholesale channel has also started to adopt these changes in its packaging, with this trend expanding to include non-alcoholic drinks section as well.[11]

Increasing Direct Imports for Large Chains - Many of the large chains are importing directly to access prices that are more competitive. As such, the ten biggest suppliers of FMGC continue to trend downwards, albeit to a lesser degree. It is yet to be seen how the new Food Reform will impact this trend.

Increasing Sales During Holidays and Weekends - Sales of FMCG products tend to be higher before major holidays and the weekend (Thursdays), with a sharp drop-down during Saturday (Israel Holiday of Shabat). It is important to note that the regional conflict has also led to real quantitative growth in the food field, especially in food categories that may be used for storage or donations.

Decreasing Online Sales – Online sales for FMCG have declined to 6.1 percent, with the largest drop occurring right after October 7, 2023. Despite the general decline, some categories show online sales increased such as quick prep dishes, canned pulses, and confectioneries.

[10] TheMarker (Hebrew only)

Increasing Foreign Supermarkets - Up until 2021, all supermarket chains in Israel were national stores, either privately-owned or traded in the stock market. In 2022, the first foreign branded supermarket in Israel—Carrefour, owned by Electra. In 2023, Electra also tried to open 7-Eleven stores, but it failed to appeal to Israeli tastes. The stores were later bought and rebranded by "Seven Express" store chain.

Trends in Services by Retailers

Technological Innovation - Most the leading grocery retailers have entered the online channel with designated online stores and apps. Many supermarkets are installing self-service check-out stations and "smart shopping carts" which have electronic registry, scanners and scales.

Private Label (PL) - Supermarket chains are PL branded products. The PL market share of Shufersal (the leading country retailer) was 27 percent as of December 2023. However, in May 2024, the owners announced that they may consider downsizing or changing Shufersal's PL to reduce Shufersal consumer liability and downsize the PL division.[12] It is yet to be seen how the new food reform will impact this trend.

Fresh Fruits and Vegetables – Such products remain a staple in the Israeli diet. Even with growth in other retail sectors, supermarkets are still dedicating a large portion of their sales to fruits and vegetables. Most are grown locally, with limited imports during the holiday seasons. In 2024, imports of fresh fruits and vegetables increased significantly due to the lack of local produce influenced by the first few months of Israel-Hamas conflict.

Special Dietary Foods - Sales of vegetarian and vegan products are on the rise and sales of milk substitutes are showing rapid growth. Following the trend, some specialty supermarkets are establishing vegan departments in branches throughout Israel.

Section 3: Competition

In 2023, Israel's import of consumer-oriented products stood at $4.9 billion, with 7.6 percent of imports from the United States, the third largest exporter of consumer-oriented products to Israel. The main competitors for U.S. consumer-oriented products are EU member states, Argentina, Turkey, and Switzerland. The U.S. industry's advantages include a good reputation for consistent quality and stable supply. The main advantages of competitors are proximity, price and EU regulatory compliance.

Section 4: Best Product Prospects

Note: As the current regional conflict began on October 7, 2023, it should be noted that the information below is reflective of a time in which the majority of the year was not in conflict. As such, the top ten products and sales potential for 2023 do not fully capture how the conflict has influenced trends for consumer-oriented products to date. The analysis for shares with good market potential will need to be further revised and analyzed, if the conflict continues.

Top Consumer-Oriented Products Imported from the World

[12] Globes

Table 1: Israel's Top Ten Imported Consumer-Oriented Product, 2023

Product	Total Imports ($, millions)	Percent of Total Imported Consumer-Oriented Products	Top 3 Suppliers Market Share in (percentage, Other than U.S)	U.S Market Share (percentage)
020230 - meat of bovine animals, boneless, frozen	480.49	9.68%	Argentina 36.83% Brazil 29.77 % Paraguay 13.75%	0.08%
020130 - Meat Of Bovine Animals, Boneless, Fresh or Chilled	272.50	5.55%	Argentina 58.67% Poland 24.35% France 5.55%	3.02%
210690 – Food preparation nesoi	263.82	5.32%	Ireland 19.07% Netherlands 12.07% Poland 9.18%	12.96%
230910 - Dog And Cat Food, Put Up for Retail Sale	171.96	3.47%	Italy 14.6% France 13.71% Spain 8.19%	11.24%
071290 - Vegetables, Nesoi, Dried And Vegetable Mixtures, Dried (Whole, Cut, Sliced, Etc.), But Not Further Prepared	158.25	3.19%	Russia 31.45% Ukraine 30.98% Romania 19.41%	3.19%
190590 - Bread, Pastry, Cakes, Biscuits And Similar Baked Products, Nesoi, And Puddings, Whether Or Not Containing Chocolate, Fruit, Nuts Or Confectionary	135.74	2.74%	Italy 27.48% Turkey 10.04% Spain 5.35%	24.04%
180690 - Cocoa Preparations, Not In Bulk Form, Nesoi	124.16	2.5%	Italy 45.86% Germany 9.34% Belgium 7.76%	2.96%
170490 - Sugar Confectionary (Including White Chocolate), Not Containing Cocoa, Nesoi	112.60	2.27%	Spain 23.3% China 13.77% Turkey 12.38	10.26%
090121 - Coffee, Roasted, Not Decaffeinated	98.94	1.99%	Switzerland 50.66% Italy 41.37% France 4.29%	0.1%
220830 - Whiskies	94.32	1.9%	United Kingdom 89.17% Ireland 4.61% Japan 0.99%	4.57%

Source: Trade Data Monitor, BICO-HS6 Consumer Oriented Agriculture, Year Ending, (September 2024)

Table 2: Israel's Top Ten Imported Consumer-Oriented Product Groups, 2023

Product Group	Total Imports ($, millions)	Percent of Total Imported Consumer-Oriented Products	Top 3 Suppliers Market Share (percentage, Other than U.S)	U.S Market Share (percentage
Beef & Beef Products	793.85	15.99%	Argentina 43.03% Brazil 20.34% Poland 14.93%	2.01%
Bakery Goods, Cereals, & Pasta	450.62	9.08%	Italy 24.29 % Turkey 11.67% Spain 6.07%	9.74%
Processed Vegetables	414.85	8.36%	Russia 12.41% Ukraine 12.1% Belgium 10.34 %	5.6%
Dairy Products	377.04	7.60%	Netherland 17.87 % Poland 10.37 % Germany 10.36 %	2.74 %
Chocolate & Cocoa Products	305.20	6.15%	Italy 20.28 % Germany 15.53 % Netherland 7.54 %	1.8 %
Soup & Other Food Preparations	265.45	5.35%	Irland 18.95 % Netherland 12.03 % Poland 9.13 %	12.88 %
Tree Nuts	236.45	4.77%	Vietnam 16.78 % Turkey 7.18% China 5.59 %	54.05%
Distilled Spirits	205.12	4.13%	United Kingdom 44.64% France 11.06 % Russia 6.64 %	2.32 %
Coffee, Roasted and Extracts	185.17	3.73%	Switzerland 27.92 % Italy 23.73 % South Korea 19.44 %	0.13%
Non-Alcoholic Bev. (ex. juices, coffee, tea)	184.22	3.71%	Poland 21% Italy 20.93% Turkey 9.73%	2.29%

Source: Trade Data Monitor, BICO-HS6 Consumer Oriented Agriculture, Year Ending, (September 2024)

Table 3: Israel's Top Ten Imported Consumer-Oriented Product from the U.S., 2023

Product	U.S		World		
	Total Imports ($, millions	Market Share (percentage)	Total Imports ($, millions	Top 3 Competitors Market Share (percentage)	Market Share from Total Imports (percentage)
080251 – Pistachios, In shell, Fresh or Dried	39.95	95.17%	41.97	Turkey 4.83%	0.85%
210690 - Food preparation nesoi	34.18	12.96%	263.82	Irland 19.07% Netherlands 12.07% Poland 9.18%	5.32%
190590 - Bread, Pastry, Cakes, Biscuits And Similar Baked Products, Nesoi, And Puddings, Whether Or Not Containing Chocolate, Fruit, Nuts Or Confectionary	32.62	24.04%	135.75	Italy 27.48% Turkey 10.04% Spain 5.35%	2.74%
080299 - Nuts, fresh or dried, whether or not shelled or peeled (excl. coconuts, Brazil nuts, cashew nuts, almonds, hazelnuts, filberts, walnuts, chestnuts, pistachios, macadamia nuts, kola nuts, areca nuts and pine nuts)	30.99	100%	30.99	N/A	0.63%
080212 - Almonds, Fresh Or Dried, Shelled	24.28	92.2%		Spain 7.28% France 0.51% Italy 0.01%	0.53%
080232 - Walnuts, Fresh Or Dried, Shelled	22.25	84.84%	26.23	Chile 8.61% Turkey 3.99% Vietnam 0.95%	0.53%
230910 - Dog And Cat Food, Put Up For Retail Sale	19.32	11.24%	171.96	Italy 14.6% France 13.71% Spain 8.19%	3.47%
080810 - Apples, Fresh	15.93	26.43%	60.29	Italy 47.97% France 26.43% Turkey 5.24%	1.22%
210390 - Sauces And Preparations Therefor, Nesoi; Mixed Condiments And Mixed Seasonings	12.18	20.78%	58.67	Thailand 17.36% Netherlands 11.95% Portugal 5.22%	1.18%
200290 - Tomatoes, Other Than Whole Or In Pieces (Including Paste And Puree), Prepared Or Preserved Otherwise Than By Vinegar Or Acetic Acid	11.57	37.57%	30.80	China 27.37% Italy 27.32% Turkey 5.6%	0.62%

Source: Trade Data Monitor, Consumer Oriented Agriculture, Year Ending, (September 2024)

Table 4: Consumer Oriented Product Groups Present in Market

(Change in Sales for 2023/22 and January-July 2023/24)

Description	Calendar Year (Value: $, million)						January-July (Value: $, million)		
	2019	2020	2021	2022	2023	%Δ 2023/22	2023	2024	%Δ 2024/23
all	**3,598**	**3,840**	**4,628**	**5,244**	**4,963**	**-5%**	**2,991**	**3,099**	**3.6%**
bico-beef & beef products	630	611	823	1,031	794	-23%	451	497	10.16%
bico-bakery goods, cereals, & pasta	299	332	373	430	451	5%	276	247	-10.44%
bico-processed vegetables	186	212	353	443	415	-6%	252	268	6.69%
bico-dairy products	249	290	305	327	377	15%	237	230	-2.67%
bico-chocolate & cocoa products	233	245	265	294	305	4%	186	188	0.8%
bico-soup & other food preparations	254	251	248	273	265	-3%	160	153	-4.26%
bico-tree nuts	251	244	253	283	236	-16%	158	144	-8.565
bico-distilled spirits	160	166	239	231	205	-11%	134	136	1.625
bico-coffee, roasted and extracts	147	165	195	196	185	-6%	109	118	8.16%
bico-non-alcoholic bev. (ex. juices, coffee, tea)	118	134	166	172	184	7%	107	109	1.96%
bico-processed fruit	140	149	165	189	177	-6%	108	108	-0.39%
bico-dog & cat food	97	114	141	167	172	3%	101	112	10.76%
bico-fresh vegetables	91	97	91	176	144	-18%	40	80	100.34%
bico-fresh fruit	86	106	119	136	136	0%	98	118	19.94%
bico-chewing gum & candy	64	55	81	98	116	18%	78	59	-23.38%
bico-condiments & sauces	65	66	89	100	103	4%	65	62	-4.22%
bico-beer	62	71	85	77	91	17%	49	64	31.37%
bico-wine & related products	50	59	87	87	86	-1%	59	52	-11.655
bico-fruit & vegetable juices	71	69	89	94	85	-10%	53	78	45.72%
bico-spices	28	38	43	50	36	-27%	25	27	11.19%
bico-eggs & products	21	28	26	28	35	24%	26	23	-12.3%
bico-nursery products & cut flowers	19	24	32	30	30	0%	16	20	21.94%
bico-meat products nesoi	19	17	18	24	21	-12%	18	14	-21.29%
bico-poultry meat & prods. (ex. eggs)	23	19	29	17	20	23%	12	14	10.75%
bico-tea	9	13	14	13	13	2%	9	10	11.26%

Source: Trade Data Monitor, BICO-HS6 Consumer Oriented Agriculture, Annual & YTD Series, (September 2024)

Products Present in Market with Good Sales Potential

- All products that are marketed in the EU or comply with EU regulations.
- Products with large market share.
  - Tree Nuts
- Products with good sales potential—i.e. the U.S has presence in the market and can increase its market share
  - Kosher beef
  - Food preparation and soups
  - Pet food
  - Processed fruit and vegetables
  - Non-alcoholic beverages
  - Apples and pears
  - Dairy products
  - Alcoholic beverages (including wine)

Products Not Present in Significant Quantities, but with Good Sales Potential

- Chilled kosher beef
- Frozen fruits
- Premium confectionary (E.g. - premium chocolate, cookies, ice cream)
- Organic food
- Vegan and vegetarian products
- Gluten free products

Products Not Present in the Market or Present in Small Amounts due to Barriers

- Non-Kosher meats are not permitted for importation.
- Non-Kosher products especially crustaceans and mollusks. Most supermarkets that cater to the general population will not sell them as well, as the major hotels and restaurants.
- Bananas, strawberry, cherries, and citrus are not allowed for importation due to phytosanitary restrictions.

Section 5: Key Contacts and Further Information

Links to Government Sources

- Israel Tax Authority – Customs Tariff Book
- Israel Central Bureau of Statistics (CBS) - Imports and Exports of Goods and Services
- The Standard Institution of Israel (SII)
- Ministry of Economy and Industry
  - Foreign Trade Administration (FTA)
- Ministry of Agricultural and Food Security
  - Veterinary Services and Animal Health
  - Plant Protection and Inspection Services
- Ministry of Health
  - National Food Services

- List of approved food importers and marketers

Trade Associations

- Israel - America Chamber of Commerce (AmCham Israel)
- Federation of Israeli Chamber of Commerce (FICC)
- Manufacturers Association of Israel (MAI)

FAS/Tel Aviv Market Reports:

- GAIN ISRAEL – Exporter Guide 2024
- GAIN ISRAEL - Israel Food Service - Hotel, Restaurant & Institutional 2023 Annual
- GAIN ISRAEL - Israel Food Processing Ingredients 2023 Annual

For questions or comments regarding this report, or assistance in exporting to Israel, U.S. interested parties are encouraged to contact the Foreign Agricultural Service in Tel Aviv. Importer listings are available from the Foreign Agricultural Service for use by U.S. exporters of U.S. food and beverage products.

Foreign Agriculture Service – Tel Aviv 71 Hayarkon Street Tel Aviv, Israel 63903	Phone: 03-519667/671 Email: agtelaviv@usda.gov http://www.fas.usda.gov

Attachments:

No Attachments.