Re:Tech
Disrupting Retail.

Israeli Retail & Commerce Tech in 2025:
Resilience, Recovery, and Opportunity

In partnership with

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ISRAELI RETAIL TECH IN 2025

502
Startups

23
Investments

$463M
Raised

135%
YOY Funding
Growth

58%
Growth
Median Deal Size

11
Exits

1. Executive Summary: A Leaner, Stronger Retail Tech Ecosystem

The Israeli retail tech ecosystem has undergone a significant structural reset over the past decade. Like many global tech sectors, it experienced a cycle of rapid growth, correction and recalibration.

What distinguishes Israel's retail tech market is not the absence of these challenges, but how the ecosystem absorbed them, either through consolidation, higher survival rates, and a shift toward more mature, scalable companies. Despite geopolitical headwinds and a global investment slowdown, Israeli startups continue to deliver breakthrough solutions in ecommerce enablement, marketing, digital and media, retail digitalization and store operations, checkout and payments, supply chain and logistics, marketplaces and DTC, security and infrastructure and industrial innovation.

135%
YoY growth in retail tech funding

Following a period of rapid expansion between 2017 and 2019 and a funding peak in 2021, the sector entered a global downturn marked by capital contraction, reduced deal activity, and heightened uncertainty. We have seen a clear inflection point in 2025, and after two years of contraction, retail tech funding in **Israel recorded 135% year-over-year growth, signaling renewed investor confidence and a return to deployment, albeit with a more disciplined and selective lens. Israel's retail tech ecosystem** entered 2025 with clear signs of recovery and driven not by hype, but by fundamentals. Capital is flowing back into fewer, stronger companies, with investors prioritizing scale, traction, and global relevance.

Key highlights:

>>> Funding reset, then rebound: Total retail tech funding more than doubled from $197M in 2024, to $463M in 2025 (+135% YoY).

>>> Deal activity is rising, selectively: Deal count increased from 17 deals in 2024 to 23 deals in 2025 (+35%).

>>> Bigger, healthier rounds: Median deal sizes strengthened steadily, from $5.0M (2023) to $9.5M (2024) and $15M (2025).

>>> Capital is concentrating where it counts: The top 20% of funding rounds capture 40% of total capital, reflecting a mature ecosystem anchored by scale-ready companies.

To fully leverage this ecosystem, global retailers, brands, and investors should recognize that Israel's startup culture is fast-moving and distinct from other regions. **Navigating 502 retail tech companies and over 8,000 startups overall requires a local partner who understands the ecosystem dynamics and can help identify the right opportunities.** For global retailers, brands, and investors, this moment represents an opportunity to re-engage with an ecosystem that has emerged leaner, stronger, and more aligned with real market needs.

Despite challenges ranging from capital markets volatility to founders serving in reserve duty Israel remains one of the most dynamic retail tech ecosystems in the world.

The Infrastructure Dividend: Israel's Significant Role in Retail's Critical Backbone

For much of the last decade, the global retail technology narrative was dominated by customer experience innovation - AR applications, virtual showrooms, and experimental engagement channels. However, 2025 data indicates a structural pivot. The market has shifted from novelty to operational necessity, creating a distinct opportunity for investors seeking measurable return on investment.

This report highlights a significant divergence in capital flows. While global retail tech funding has stabilized, Israel's retail tech sector recorded a 135% year-over-year surge. Constrained by limited domestic markets and geopolitical imperatives, Israeli founders have bypassed discretionary applications in favor of critical infrastructure.

Capital allocation is increasingly targeting Generative and Agentic AI embedded within the foundational layers of retail: predictive supply chain, fraud prevention, and autonomous pricing. Capital is concentrating in operationally critical layers of retail particularly Supply Chain, Digital Marketing, and Ecommerce Enablement, rather than speculative consumer applications.

The market contraction of 2023–2024 served as a rigorous filter for asset quality. The 502 active companies remaining represent a battle-tested cohort. With a median deal size of $15M, the asset class has matured beyond early-stage speculation. Israel has evolved from a source of consumer-facing experiments to a vital component of the critical infrastructure backbone of global commerce, securing the enterprise and enabling e-commerce at scale.

Yariv Lotan

Vice President of Product & Data

From Moonshot

Retail is evolving at a pace we have never seen before. Technology is no longer just a tool; it is becoming the very fabric of how consumers discover, interact with, and purchase products. Israeli retail tech is riding this wave, and it is exciting to see our ecosystem not only keeping up with global trends but often leading the way.

This report highlights a remarkable moment for our market. Funding more than doubled over the past year, a clear sign of both scale and maturity. Deals are bigger, healthier, and more strategic, reflecting an ecosystem that has grown confident in its ability to solve real-world retail challenges. We at Moonshot are proud to

have been part of this growth, announcing our $10M seed round led by Mighty Capital and Oceans Ventures.

AI is everywhere, and Israeli startups like Moonshot are turning complex problems into real value for customers. In our case, we automatically optimize online stores, a task that previously required teams of developers, designers, analysts, UX and product managers, and a lot of guesswork. With Moonshot, our brand partners have increased revenue by many millions of dollars. Looking ahead to 2026, the big question will be whether agentic commerce becomes a reality or remains a trend on LinkedIn posts.

What strikes me most in this year's report is the resilience and creativity of Israeli retail tech. Even amid the challenges of 2025, startups bounced back stronger than ever. We are proud to be part of this dynamic ecosystem, driving innovation and shaping the future of global retail.

Aviv Frenkel
Co-Founder & CEO

Why Global Retail is Paying Attention to Israeli Retail Tech in 2026 and Beyond

Retail technology, spanning ecommerce enablement, payments, store operations, logistics, analytics, and infrastructure, has become a foundational layer of global commerce. **For retailers today, technology is no longer a differentiator but a requirement.** As retailers face rising operational complexity, margin pressure, and evolving consumer expectations, demand for scalable, data-driven retail solutions continues to grow.

We can summarize this as **small market, global impact.**

Israel's relevance in this landscape is rooted not in market size, but in output efficiency and innovation density. Israel's footprint is outsized: while global retail tech funding grew by just 7.42% year over year, Israel recorded a 135% surge, with a median deal size of $15M compared to $3.6M globally, underscoring both accelerated momentum and a concentration of larger, more mature growth rounds.

While global retail tech investment stabilized and slowed post-2021, Israel has sustained strong deal sizes and investor confidence.

The Israeli retail tech market has also weathered unique local pressures. Founders navigating reserve duty, geopolitical uncertainty, and global capital pullbacks did not halt innovation, but instead, the ecosystem adapted. Capital became more selective, weaker companies fell out, and stronger players moved into scale-up mode.

In retail, usefulness wins over buzz. Compared to other Israeli verticals such as cyber or fintech, which tend to attract capital earlier and at larger initial scale, retail tech follows a more operationally grounded adoption curve. While this can slow hype-driven growth, it also creates companies that are closely aligned with real customer needs and long-term enterprise adoption.

What 2025 shows us is that Israel's retail tech ecosystem is entering a new phase defined by recovery, consolidation, and renewed relevance, precisely as global retailers are reassessing their technology stacks post-downturn.

Yael Kochman
CEO, Re:Tech Innovation Hub

THE EVOLUTION OF ISRAELI RETAIL TECH

The evolution of Israel's retail tech ecosystem tells a story of maturation rather than decline. What looks like slowdown on the surface is, in practice, a process of strengthening. Earlier growth phases were characterized by high startup formation and experimentation. This phase has given way to consolidation, with fewer new entrants but a more durable base of active companies.

Survival, in this context, is a signal of quality.

Startup formation peaked prior to 2020 and has since moderated. Rather than signaling weakness, this slowdown reflects a broader global shift toward capital discipline and a reduced appetite for speculative early-stage ventures.

Importantly, the active company base has remained stable, indicating that the ecosystem's core has held. Another key signal of health is survival. The ecosystem maintains a high proportion of active companies, which suggests that Israeli retail tech startups are not only being created, but sustained.

Many founders are now operating in scale-up mode, extending product depth, expanding internationally, and integrating more deeply into retailer operations. This shift reduces churn and increases long-term value creation across the ecosystem. **Israel's retail tech ecosystem is now optimized for endurance, relevance, and scale.**

⟫⟫ Number of Active Israeli Startups Over Time (2010-2025)
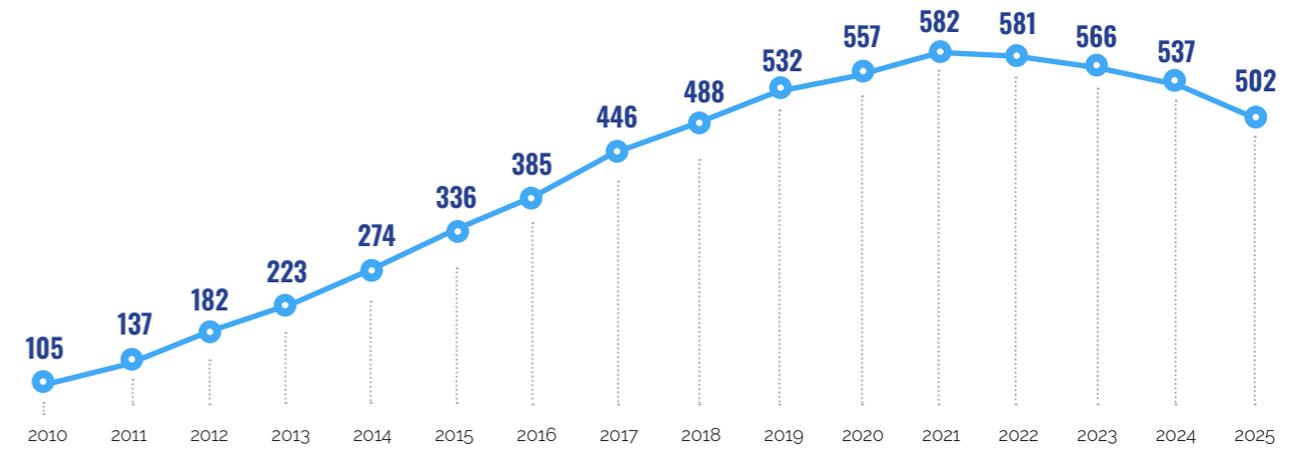
Source: Re:Tech & Startup Nation Central Finder

⟫⟫ Startups Founded and Closed Per Year (2000-2025)
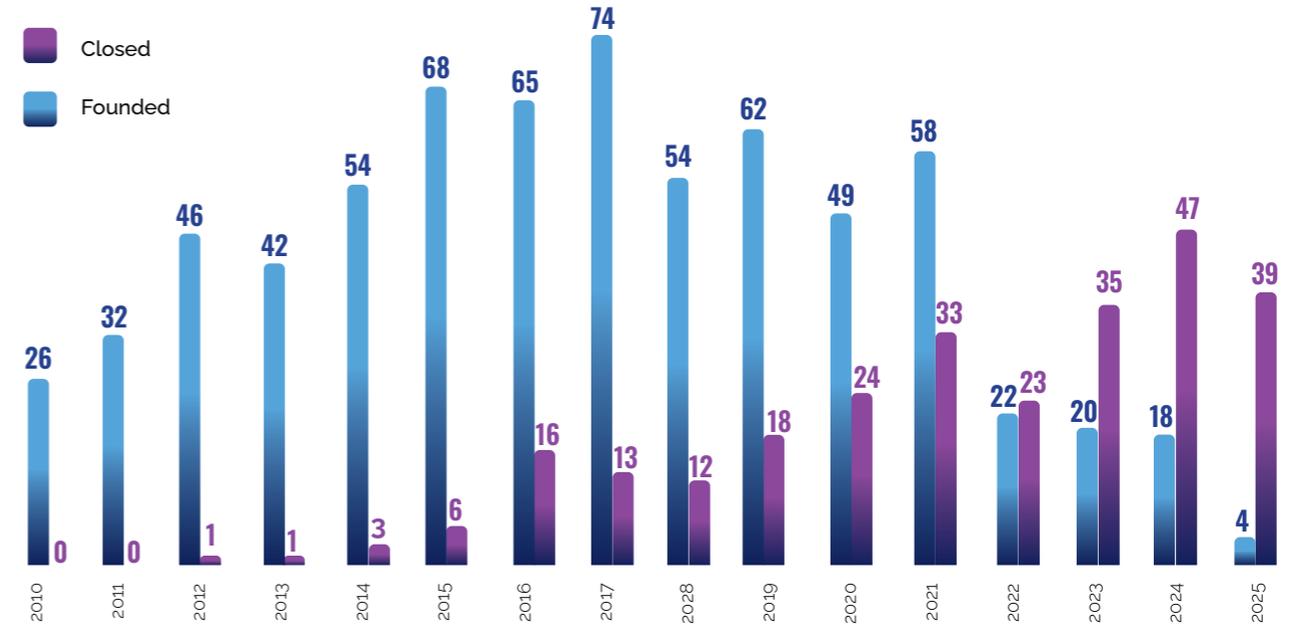
* 2025 figures are not final, as many startups operate in stealth and formally announce their founding at a later stage
Source: Re:Tech & Startup Nation Central Finder

Retail Tech Funding 2019-2025

Funding is flowing toward companies that demonstrate product-market fit, revenue traction, and global scalability. Deal activity remains selective, but confidence has returned, particularly for mid- to late-stage companies.

- **Total retail tech funding decline**d from ~$3.8B in 2021 to $200M in 2024

- **2025 funding rebounded to $463M,** representing 135% YoY growth

- **Deal count increased from 17 deals (2024) to 23 deals (2025)**, a 35% increase

- **Funding recovery occurred without a return to peak-era deal volume**, indicating selective capital deployment

In 2025 Israeli related retail tech companies raised a total of
$463M

- Number of deals
- Total Funding

$0.3B — 26 (2019)
$1.2B — 53 (2020)
$3.8B — 70 (2021)
$1.9B — 79 (2022)
$0.6B — 37 (2023)
$0.2B — 17 (2024)
$0.463B — 23 (2025)
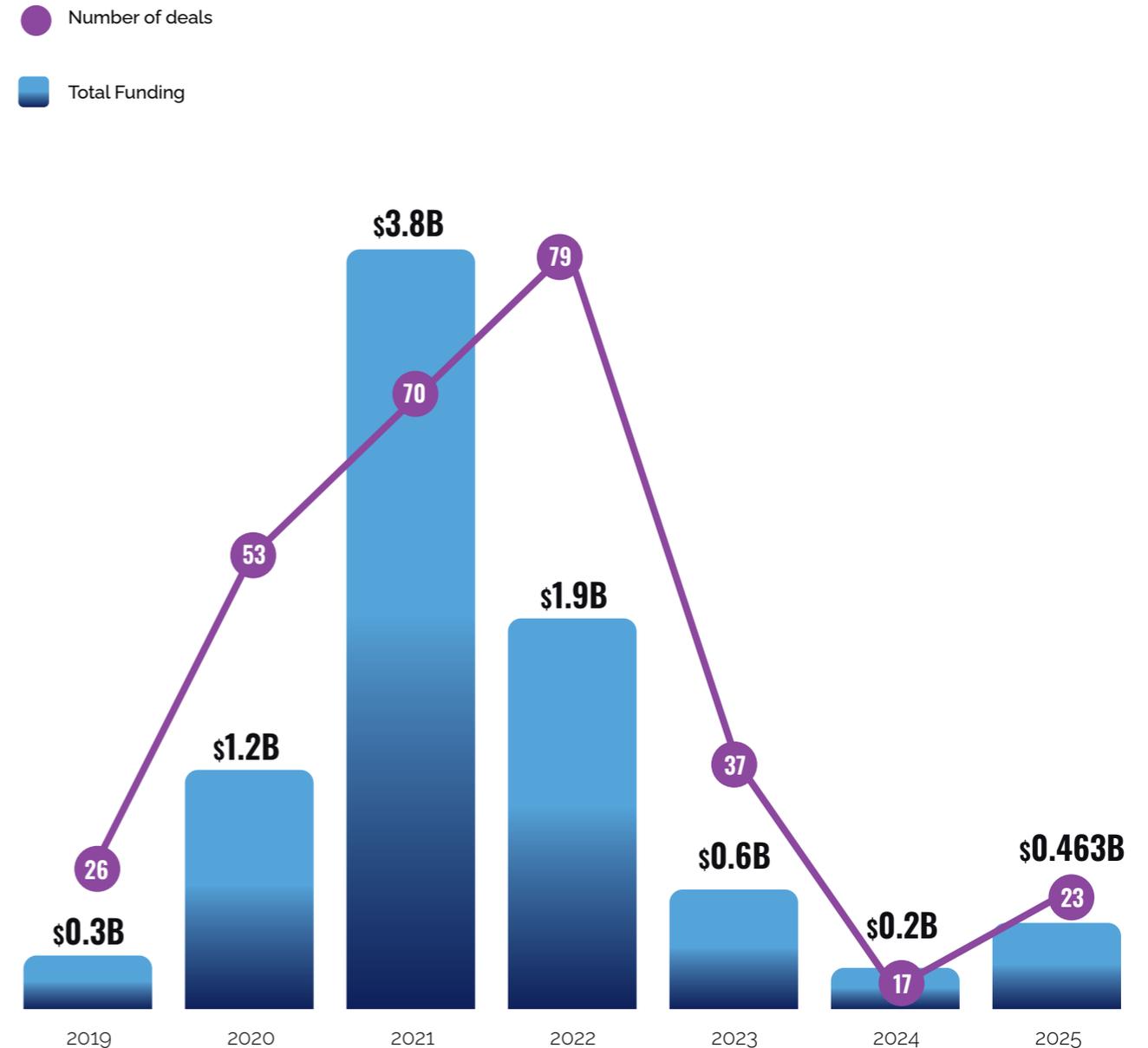
Source: Re:Tech & Startup Nation Central Finder

Deal Size Evolution

While average deal sizes fluctuated during the downturn, the ecosystem continues to support meaningful growth rounds, indicating that investors are willing to underwrite scale when fundamentals are strong.

- **Median deal size increased from $9.5M in 2024 to $15M in 2025 (+58% YoY)**, following a steady climb from $5M in 2023

- **Average deal size rose from $11.6M (2024) to $20.1M (2025) (+73% YoY),** driven by a return of mid- and late-stage rounds

- **No single deal accounts for more than ~12% of total 2025 funding**, confirming a broad-based rebound

Average vs. Median Deal Size in Israeli Retail Tech (2019-2025)

Legend:
- Number of deals
- Average Deal Size
- Median Deal Size

Data points:
- 2019: Average $12.7M, Median $3.0M, Number of deals 26
- 2020: Average $22.5M, Median $7.5M, Number of deals 53
- 2021: Average $54.3M, Median $10.0M, Number of deals 70
- 2022: Average $23.5M, Median $10.0M, Number of deals 79
- 2023: Average $15.4M, Median $5.0M, Number of deals 37
- 2024: Average $11.6M, Median $9.5M, Number of deals 17
- 2025: Average $20.1M, Median $15.0M, Number of deals 23

Source: Re:Tech & Startup Nation Central Finder

Exit Dynamics & Capital Efficiency

Liquidity in the Israeli retail tech ecosystem continues to show both breadth and consistency. 63 exits were recorded between 2021 and 2025, with acquisitions accounting for 76% of total liquidity outcomes.

Annual exit volume peaked in 2021 with 21 total exits, but since 2022, exits have stabilized at a lower but consistent level, averaging 10 exits per year, with IPOs becoming the exception rather than the norm.

This shift reflects a return to a more typical liquidity environment dominated by strategic M&A, rather than a decline in buyer interest.

Retail Tech Exit Cycles Over Time (2014–2025)

Legend:
- Acquisitions
- IPOs

Year	Acquisitions	IPOs
2014	3	0
2015	7	1
2016	4	0
2017	4	0
2018	7	1
2019	7	1
2020	7	1
2021	8	13
2022	15	0
2023	6	2
2024	8	0
2025	11	0
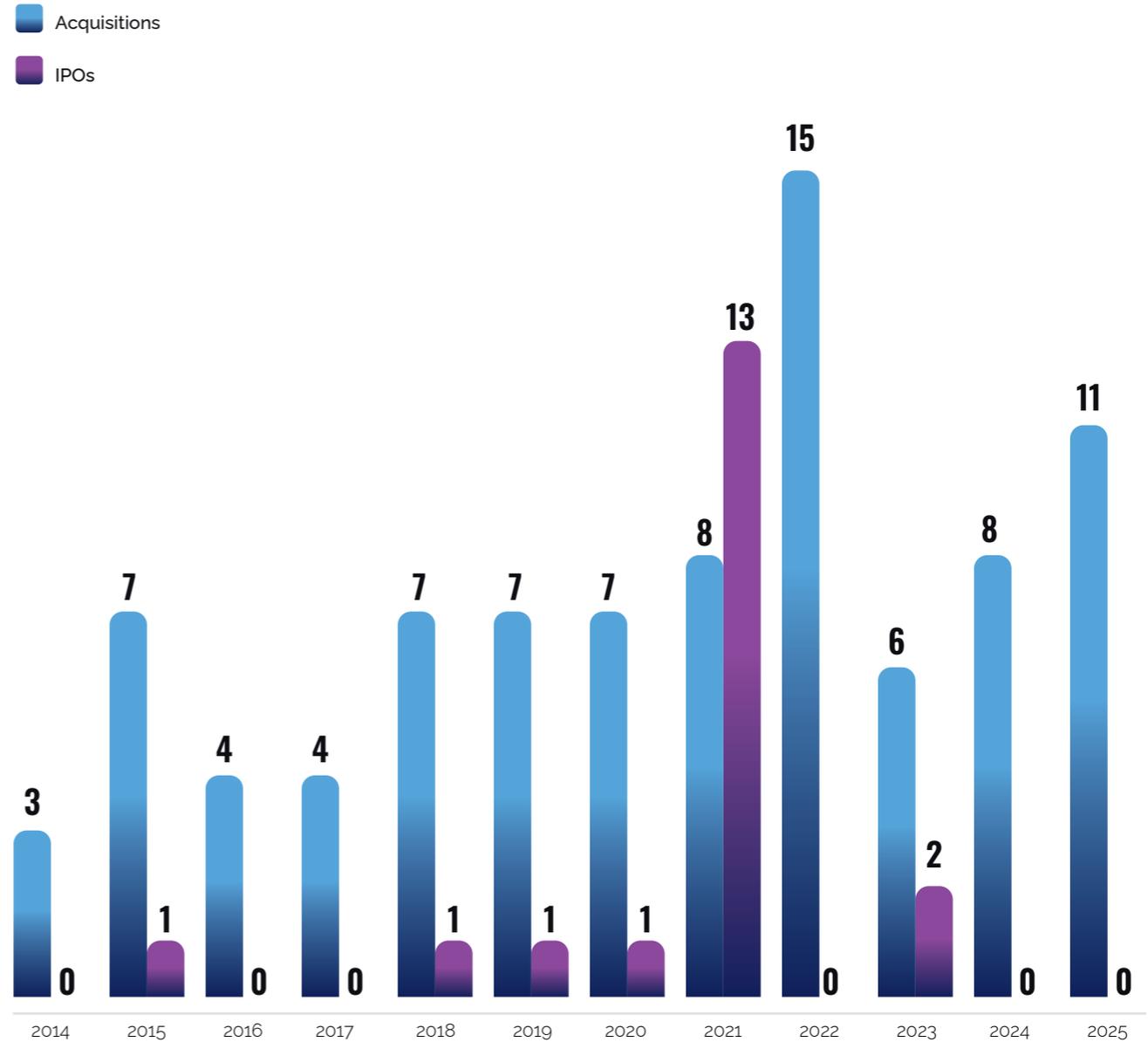
Source: Re:Tech & Startup Nation Central Finder

Acquisitions

Acquisition activity remains most concentrated in Ecommerce Enablement, Marketing, Digital & Media, and Security & Infrastructure, which together **account for near 70% of all acquisition exits in Israeli retail tech.** Acquirers are increasingly targeting scale-ready companies with proven enterprise adoption, rather than early-stage experimentation.

- **Ecommerce Enablement:** In total, 33 acquisitions. Companies such as ReturnGO acquired by Global-E in 2025, and Pepperi acquired by Advantive in 2024, highlight sustained global buyer interest in solutions that directly support revenue growth and international expansion.

- **Marketing, Digital and Media:** 23 acquisitions and 2 IPOs in this category which encompasses technologies focused on customer acquisition, engagement, personalization, and content across digital channels. Examples include Anagog (acquired by Intent HQ in 2024) and Hour One (acquired by Wix in 2025).

- **Security & Infrastructure:** 16 acquisitions in infrastructure and security platforms serving retail environments remain strategically attractive, particularly as retailers scale omnichannel operations. Anadot, acquired by Glassbox in 2025, is representative of acquisitions in this segment.

Exit Activity by Category (Acquisitions vs. IPOs)

Aggregated Across Main & Sub Categories (2005-2025)
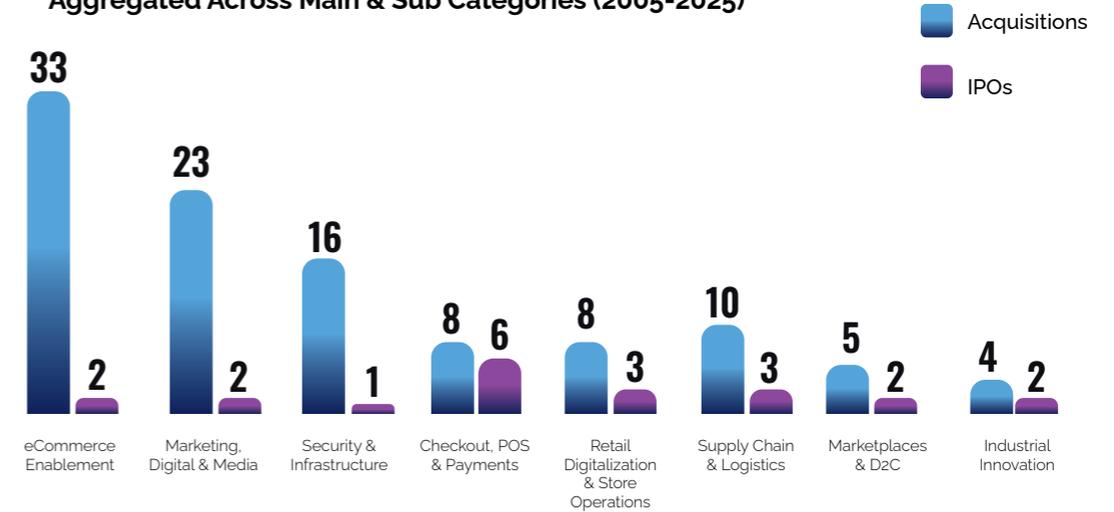
Source: Re:Tech & Startup Nation Central Finder

High Capital ≠ High Exits: Funding Efficiency by Category
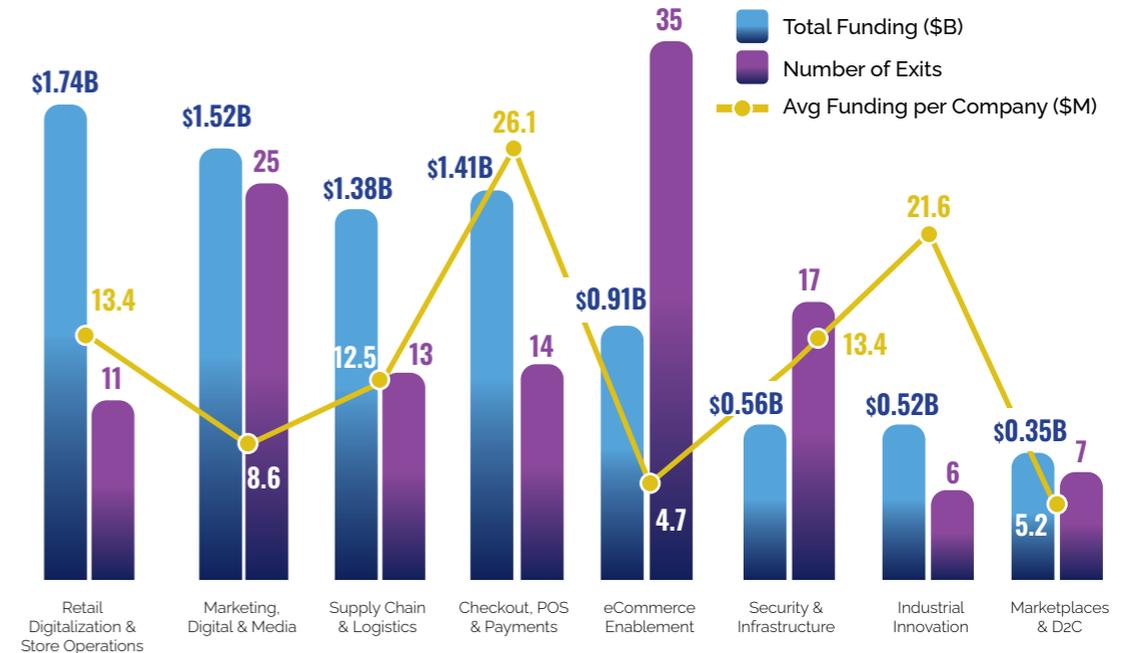
Source: Re:Tech & Startup Nation Central Finder

Funding Distribution

Funding concentration further highlights ecosystem maturity. A relatively small number of larger rounds account for a meaningful share of total capital, while smaller rounds continue to make up most transactions.

- Top 20% of funding rounds account for 40% of total capital deployed

- Larger rounds dominate total capital raised, while smaller rounds account for the majority of deal count

- This skew toward larger rounds persists through the downturn and recovery, signaling ecosystem maturity

Shift Toward Larger Rounds in Israeli Retail Tech: Deal Size Mix (2019-2025)

Legend:
- ● Total Funding (USD)
- < $1M
- 1M-5M
- 5M-20M
- > $20M

Data points:
- 2019: 26 — $331M
- 2020: 53 — $1.20B
- 2021: 70 — $3.80B
- 2022: 79 — $1.86B
- 2023: 37 — $571B
- 2024: 17 — $197M
- 2025: 23 — $463M
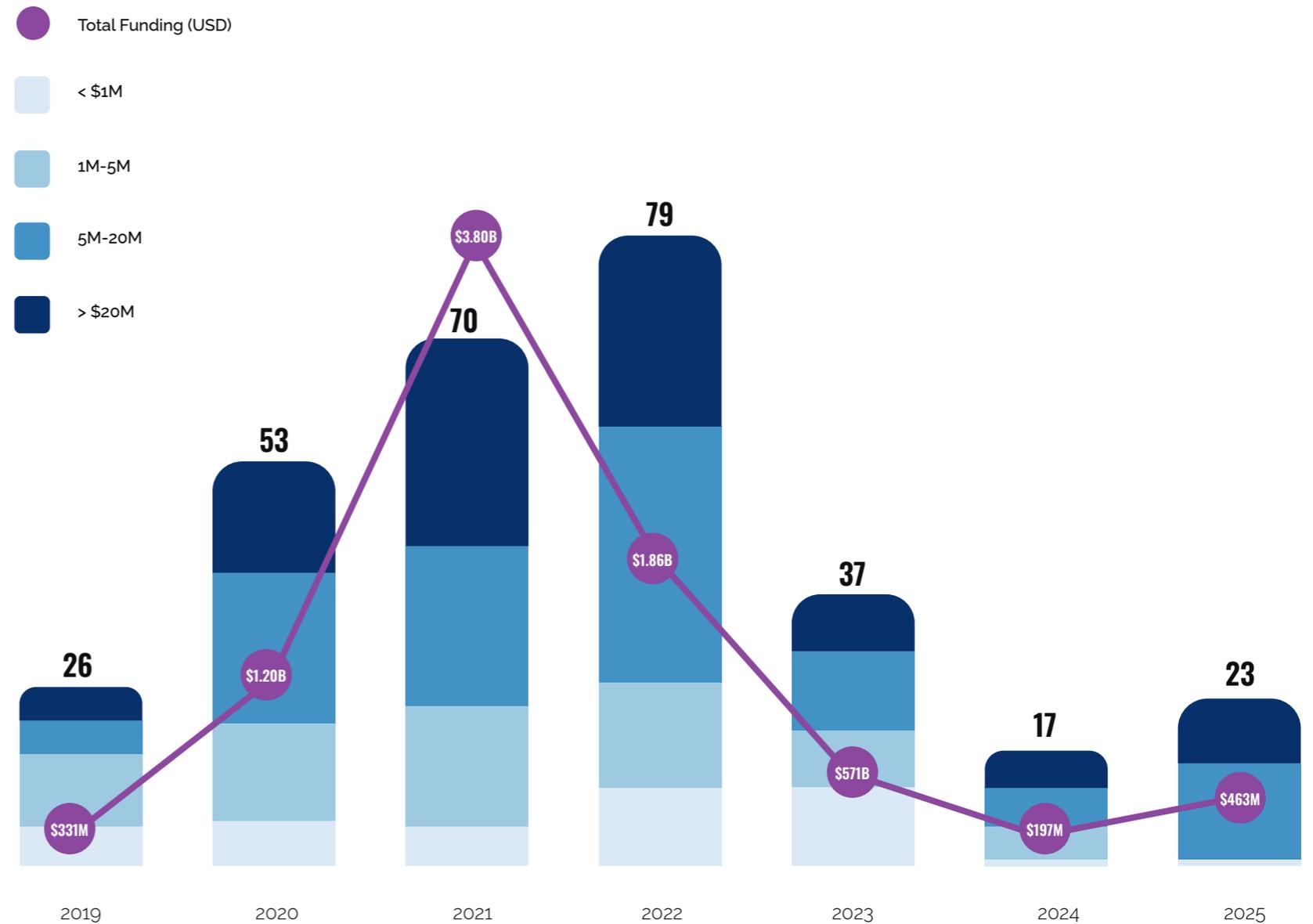
Source: Re:Tech & Startup Nation Central Finder

An Ecosystem of Retail Innovation

Retail tech in 2025 isn't one trend - it's a full-stack ecosystem.

The funding distribution shows capital flowing into **every layer of retail infrastructure**, from checkout and marketing to logistics, security, and enablement.

The 2025 retail-tech funding picture tells the story of a market that's broad and maturing rather than driven by a single breakout theme. Capital is spread across the stack, most notably **Marketing, Digital & Media** and **Supply Chain & Logistics** categories, where multiple companies are raising meaningful rounds from early growth to mid-scale. This shows evidence of sustained demand and a healthy pipeline.
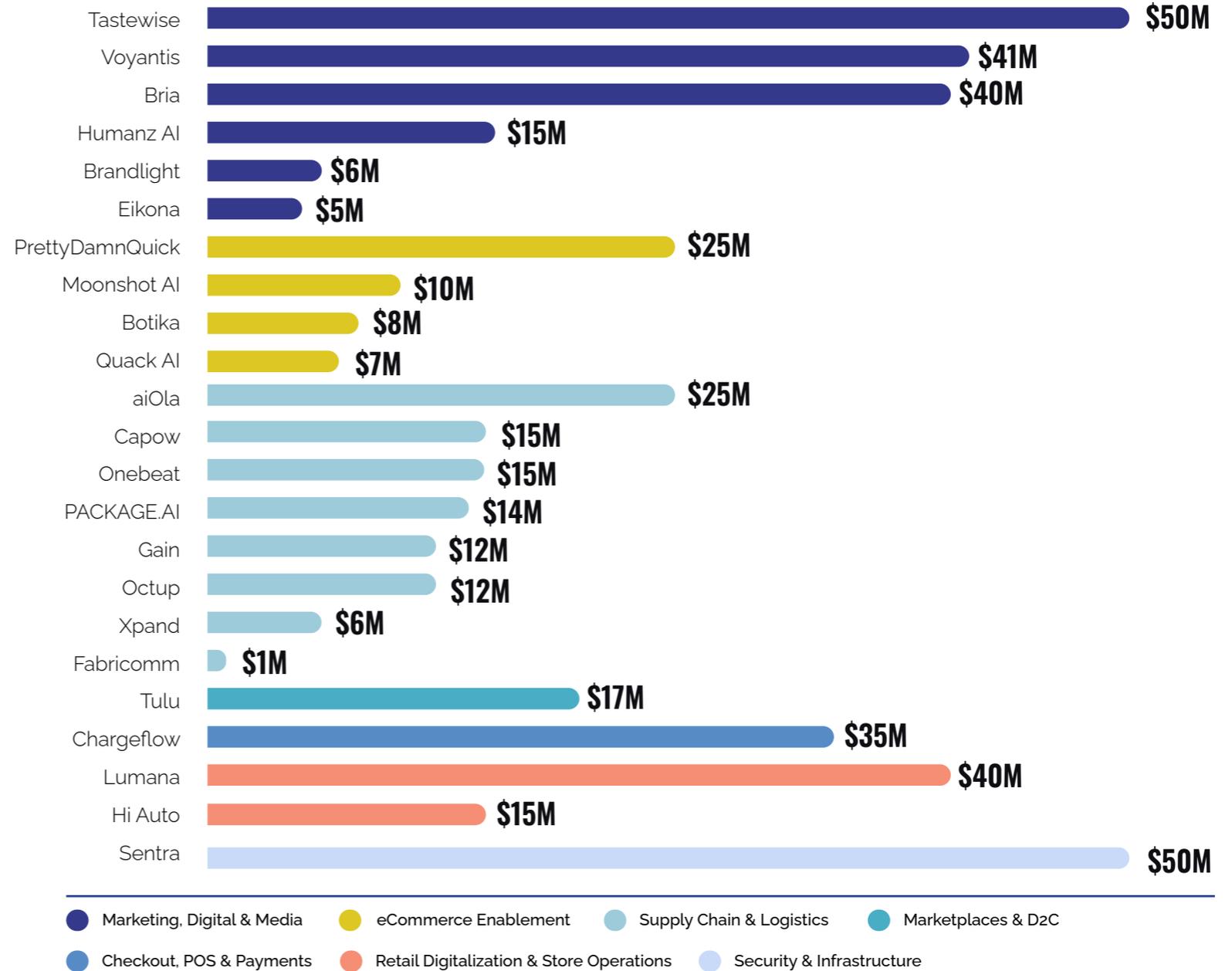
At the same time, a handful of larger, category-defining raises in areas like **checkout, store operations, and security** show that the ecosystem can also produce breakout leaders. Together, this mix of clustered mid-tier activity and selective big winners suggests retail tech is evolving into core infrastructure, with real companies scaling across every layer of modern commerce rather than chasing hype cycles.

Retail Tech Related Companies That Raised Funds In 2025

Company	Amount
Tastewise	$50M
Voyantis	$41M
Bria	$40M
Humanz AI	$15M
Brandlight	$6M
Eikona	$5M
PrettyDamnQuick	$25M
Moonshot AI	$10M
Botika	$8M
Quack AI	$7M
aiOla	$25M
Capow	$15M
Onebeat	$15M
PACKAGE.AI	$14M
Gain	$12M
Octup	$12M
Xpand	$6M
Fabricomm	$1M
Tulu	$17M
Chargeflow	$35M
Lumana	$40M
Hi Auto	$15M
Sentra	$50M

Legend:
- Marketing, Digital & Media
- eCommerce Enablement
- Supply Chain & Logistics
- Marketplaces & D2C
- Checkout, POS & Payments
- Retail Digitalization & Store Operations
- Security & Infrastructure

Source: Re:Tech & Startup Nation Central Finder

Toot Shani

Founder & Managing Partner at Sarona Ventures

"

Retail-tech is one of the most challenging markets to cater, yet one where AI and AGI pose the biggest opportunity. At Sarona, our focus on experienced entrepreneurs and repeat founders, many building with a strong B2B mindset - keeps us close to this space. We're seeing teams who deeply understand global consumers and retailers' pain points, building the infrastructure and tools that help them adapt faster, reimagining the value-chain, leveraging data, personalizing at scale, or building AI-driven platforms that directly impact retailers' top and bottom lines.
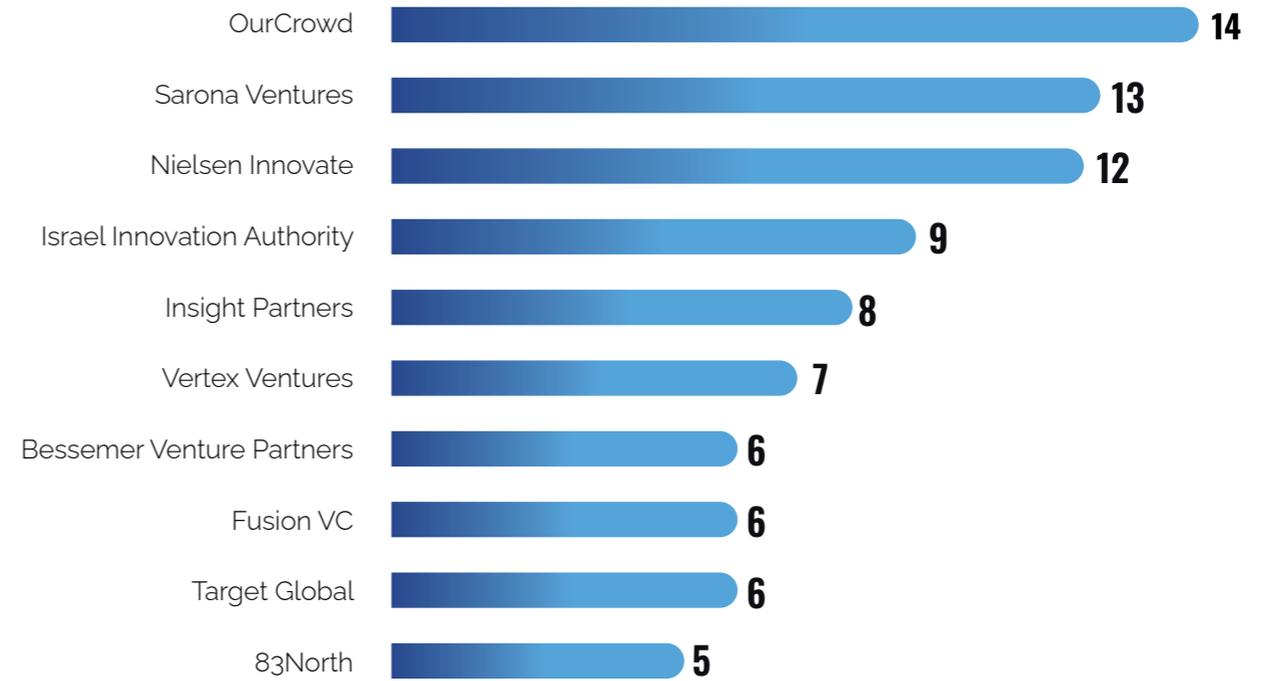
Top Investors and Active VC Players

The investor landscape in Israeli retail tech reflects a strong combination of experienced local players and increasingly active international funds. **OurCrowd leads in deal activity,** highlighting its role as a global venture platform with a strong on-the-ground presence in Israel. It is followed closely by **Sarona Ventures and Nielsen Innovate Fund (NIF)**, which bring, respectively, deep corporate retail insight and a globally oriented VC approach rooted in the Israeli ecosystem. NIF was active as a goverment supported incubator in the years 2013-2020. The Israel Innovation Authority remains a critical catalyst, supporting early-stage retail and commerce technologies through grants and co-funding that help de-risk innovation for private investors.

Beyond the leaders, firms such as Vertex Venture, Bessemer Venture Partners, Target Global, Insight Partners, Fusion VC, and 83North illustrate the blend of local expertise and global scale shaping the market. Together, this mix shows that while international capital continues to flow into Israeli retail tech, access to the most compelling opportunities is still largely driven by local presence, sector specialization, and long-term engagement with the ecosystem.

In 2025 Intel Capital and TAL Ventures invested in 2 retail related companies each.

⟫ Top 10 Most Active Investors in Israeli Retail Tech (2013-2025)

Investor	Deals
OurCrowd	14
Sarona Ventures	13
Nielsen Innovate	12
Israel Innovation Authority	9
Insight Partners	8
Vertex Ventures	7
Bessemer Venture Partners	6
Fusion VC	6
Target Global	6
83North	5

Source: Re:Tech & Startup Nation Central Finder

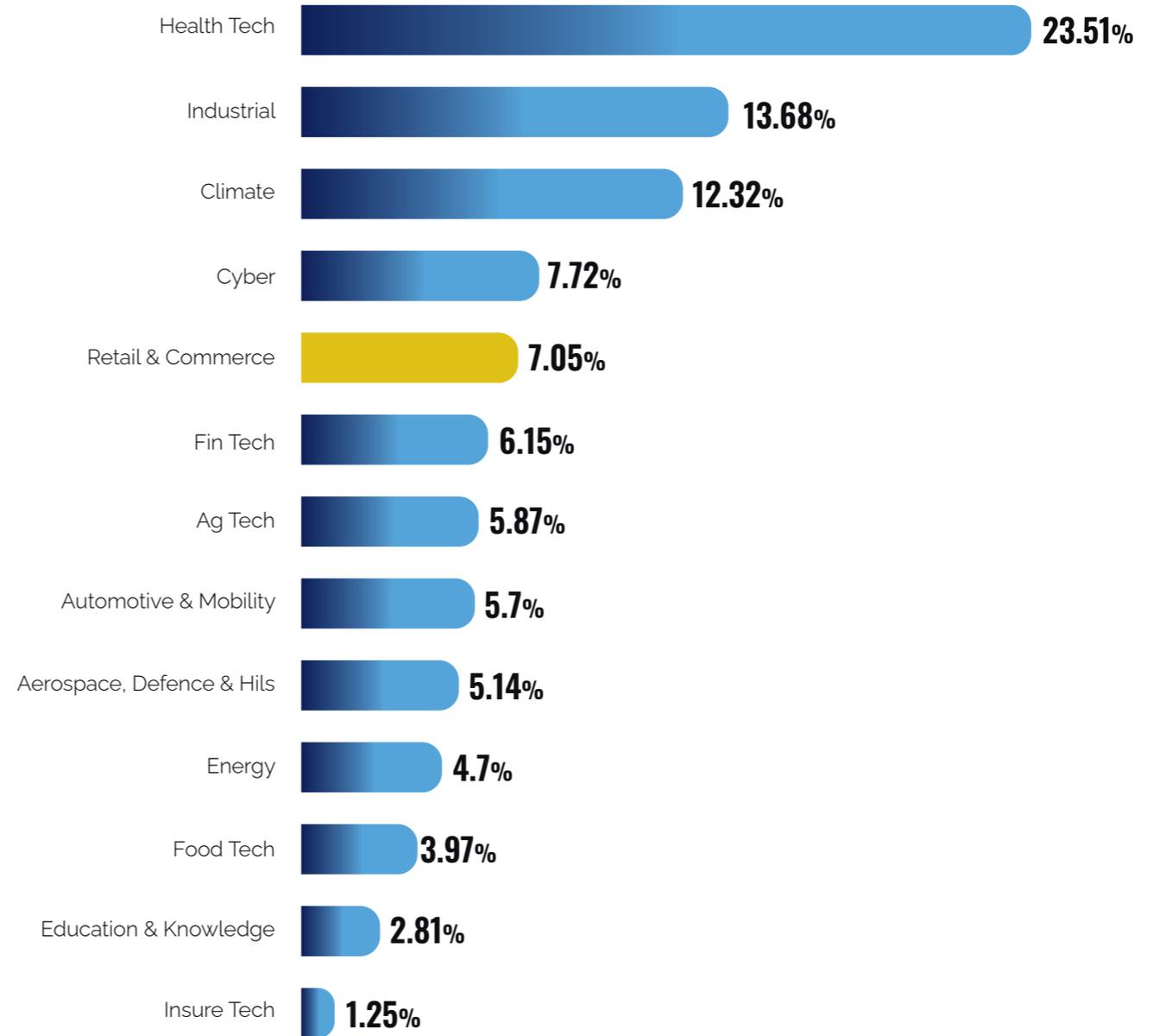# ISRAELI RETAIL TECH VS. OTHER ISRAELI TECH ECOSYSTEMS

Over the past several years, funding across the Israeli tech sector has become more concentrated in growth-ready companies, and investors have shown a clear preference for larger, later-stage rounds. This shift reflects broader global trends but is especially pronounced in sectors where unit economics and path-to-scale are clearer, such as enterprise SaaS and data-driven vertical tech.

Within this landscape, Retail & Commerce stands out not only in funding dynamics but also in scale. With roughly 500 active startups, it ranks among the larger vertical segments in the ecosystem with 7.05% of the total startups count, larger than fintech, mobility, energy, foodtech, insuretech, and several other categories. This relatively high company count signals structural depth: a broad base of innovation spanning e-commerce enablement, in-store technologies, data platforms, logistics optimization, and retail AI.

Distribution of Active Startups by Sector (Israel, 2025)

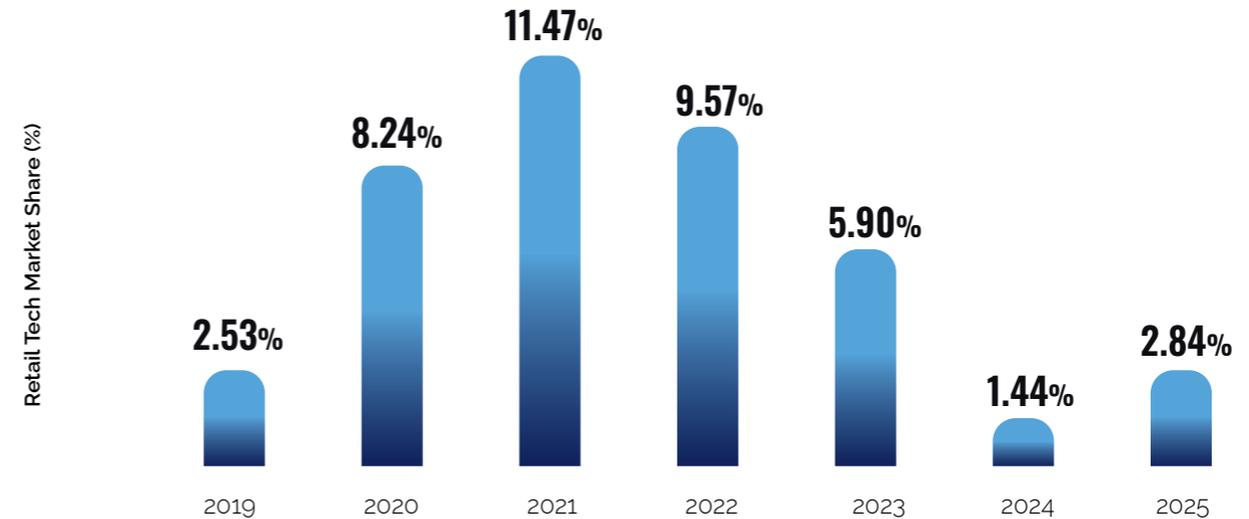| Sector	Percentage
Health Tech	23.51%
Industrial	13.68%
Climate	12.32%
Cyber	7.72%
Retail & Commerce	7.05%
Fin Tech	6.15%
Ag Tech	5.87%
Automotive & Mobility	5.7%
Aerospace, Defence & Hils	5.14%
Energy	4.7%
Food Tech	3.97%
Education & Knowledge	2.81%
Insure Tech	1.25%

Source: Re:Tech & Startup Nation Central Finder

Retail tech is a focused yet resilient segment within Israel's innovation ecosystem. In 2025, it led funding growth, positioning it as a specialized vertical rather than a capital-heavy one. Compared to cybersecurity and fintech, which attract larger and more speculative funding rounds, retail tech shows closer alignment between capital deployment and real enterprise adoption. It is also less exposed to regulatory pressure and macroeconomic swings than fintech, placing it in a distinct middle ground within the tech landscape:

- **Faster commercialization than foodtech**, with shorter paths from product development to enterprise deployment

- **Stronger linkage between funding and revenue adoption than fintech**, particularly in ecommerce enablement, analytics, and payments

- **Lower capital concentration than cyber**, resulting in a more diversified and resilient funding profile

Notably, retail tech demonstrated one of the strongest post-downturn recoveries among Israeli tech verticals, with deal growth in 2025 outpacing several larger sectors.

Evolution of Retail Tech's Share in Israeli Tech Funding (2019-2025)

Retail Tech Market Share (%)

- 2019: 2.53%
- 2020: 8.24%
- 2021: 11.47%
- 2022: 9.57%
- 2023: 5.90%
- 2024: 1.44%
- 2025: 2.84%

Source: Re:Tech & Startup Nation Central Finder

Retail Tech vs. Israeli Tech: Median Deal Size Growth Since 2019 (Index)

- Retail Tech Median Deal Size Index
- Total Israeli Tech Median Deal Size Index

Year	Retail Tech Median Deal Size Index	Total Israeli Tech Median Deal Size Index
2019	100	100
2020	250	105
2021	333	126
2022	333	122
2023	167	94
2024	317	97
2025	500	108
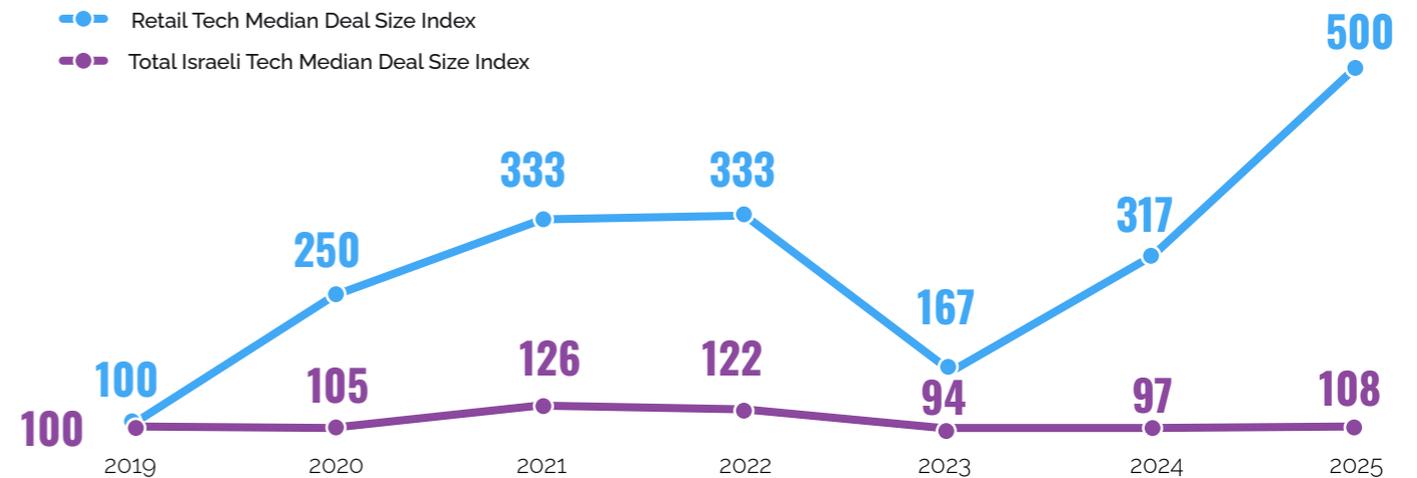
Source: Re:Tech & Startup Nation Central Finder

Retail Tech Leads 2025 Funding Growth vs. Other Verticals (YoY)

- Retail Tech: 135%
- Business Software: 73.1%
- Cybersecurity: 7.9%
- Median line shown
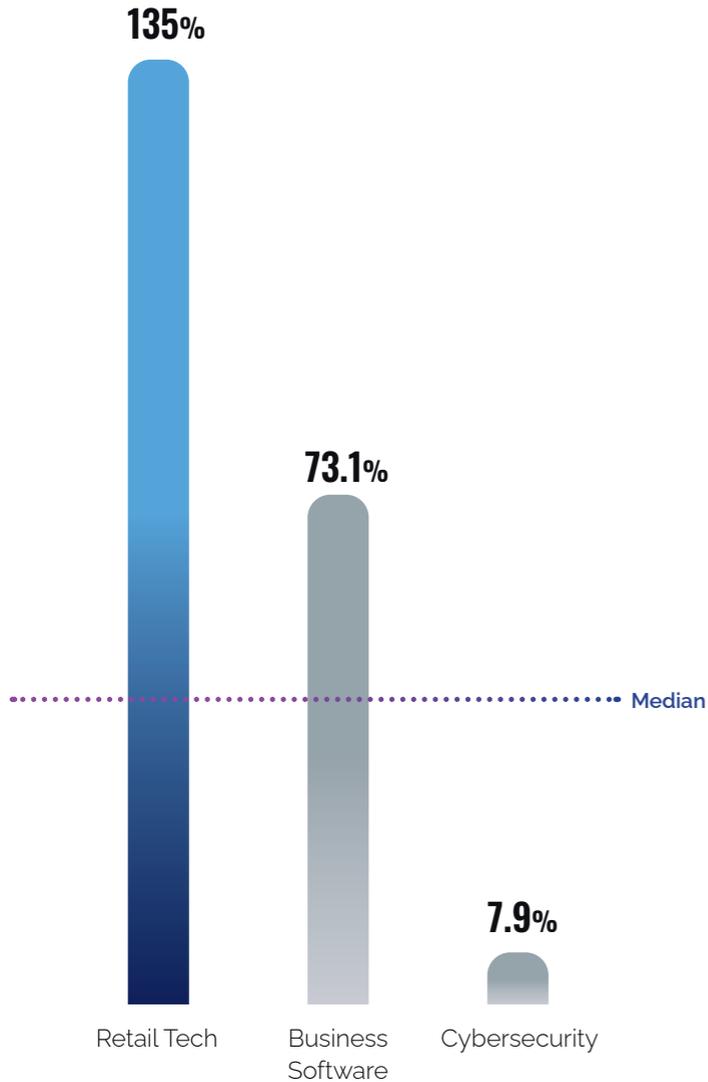
Source: Re:Tech & SNC

Retail Tech vs. Israeli Tech Market: Funding Share and Deal Flow Divergence (2019-2025)

Legend:
- Total Market Deals
- Retail Tech Deals
- Retail Tech Funding ($B)
- Total Market Funding ($B)

Year	Total Market Deals	Retail Tech Deals	Total Market Funding ($B)	Retail Tech Funding ($B)
2019	1020	26	$10.2B	$0.33B
2020	1055	53	$14.0B	$1.20B
2021	1332	70	$30.9B	$3.80B
2022	1172	79	$19.2B	$1.86B
2023	802	37	$9.1B	$0.57B
2024	891	17	$13.0B	$0.20B
2025	717	23	$15.6B	$0.46B

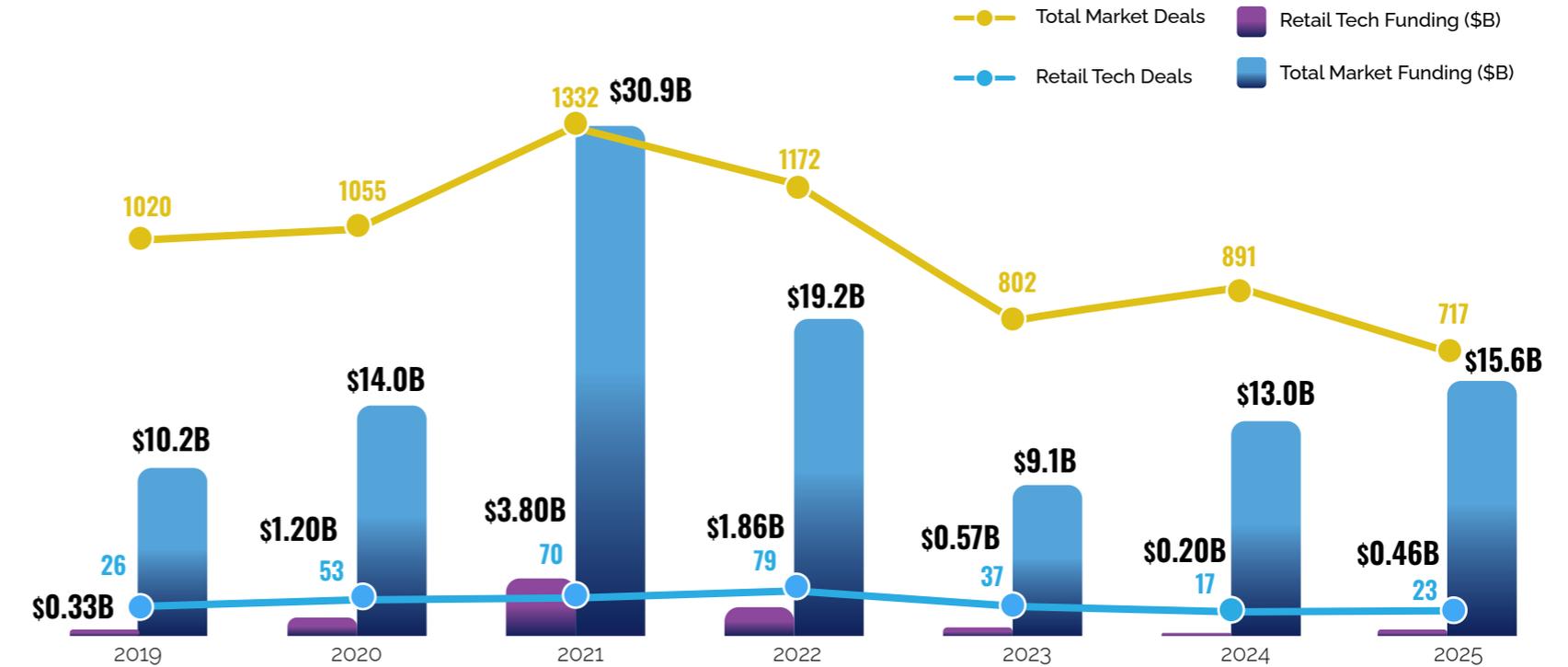**Source:** Re:Tech & Startup Nation Central Finder

Retail Tech Share of Israeli Tech Exit Activity (2019–2025)

Legend: Retail Tech Share of Total Exits %

Year	Retail Tech Share of Total Exits %
2019	7.1%
2020	6.7%
2021	9.4%
2022	12.7%
2023	10.3%
2024	8.0%
2025	11.9%

Average line shown
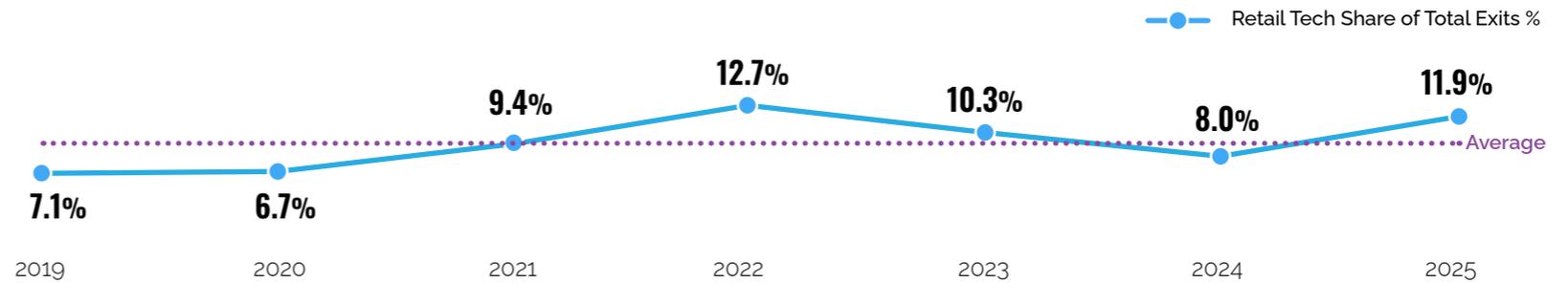
Source: Re:Tech & Startup Nation Central Finder

ISRAEL VS. GLOBAL RETAIL TECH ECOSYSTEMS

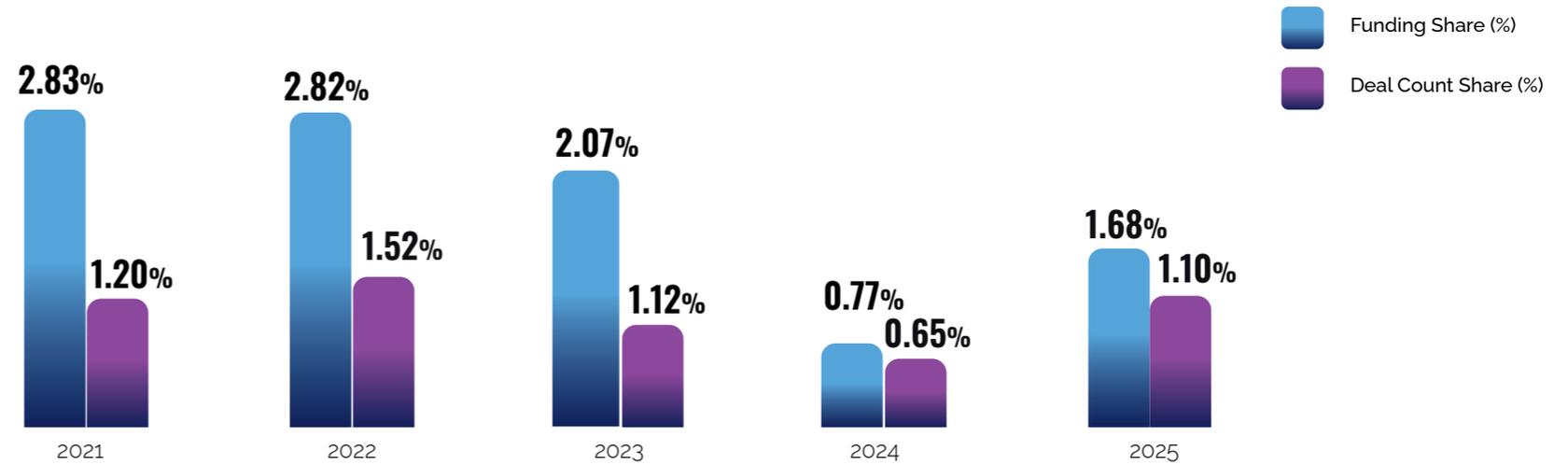Globally, Israeli retail tech remains distinct in both structure and behavior. Israel continues to capture an outsized share of global retail tech investment relative to its size. Unlike larger ecosystems in the US or Europe, Israeli retail tech companies are global-first by necessity, with most targeting international retailers and brands from inception. Structural characteristics that differentiate Israel include:
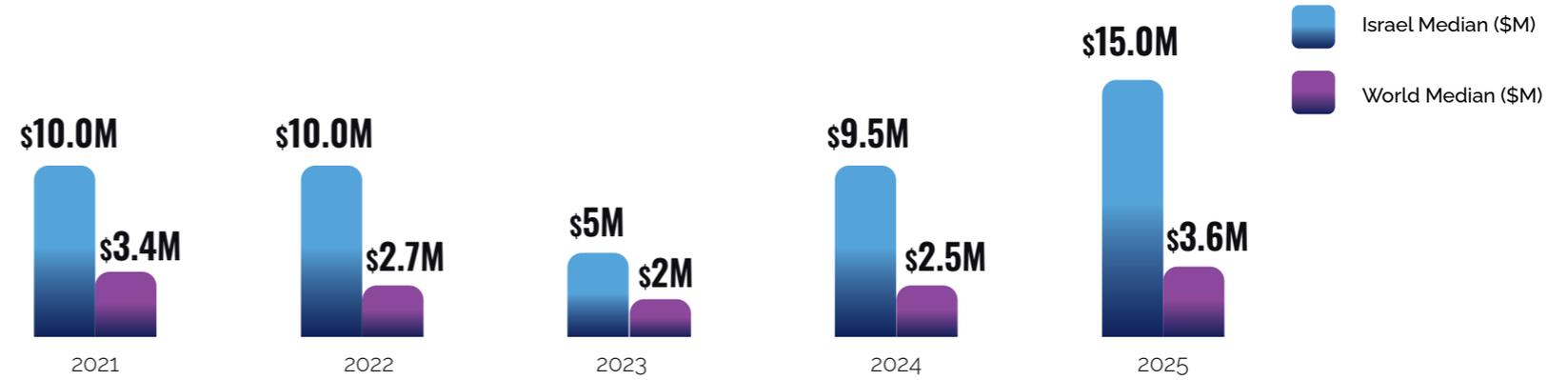
- **High ecosystem density:** enabling rapid iteration, partnerships, and talent mobility

- **Innovation concentrated in core operational layers of retail:** payments, analytics, infrastructure, logistics, rather than consumer-facing experimentation alone

- **A balanced category mix:** this reduces overreliance on any single sub-sector

Israel's Weight in Global Retail Tech: Funding Share vs Deal Share (2021-2025)

- Funding Share (%)
- Deal Count Share (%)

	2021	2022	2023	2024	2025
Funding Share	2.83%	2.82%	2.07%	0.77%	1.68%
Deal Count Share	1.20%	1.52%	1.12%	0.65%	1.10%

Source: Re:Tech & Startup Nation Central Finder. Global numbers source: CB Insights

Median Retail Tech Deal Size: Israel vs Global Market (2021-2025)

- Israel Median ($M)
- World Median ($M)

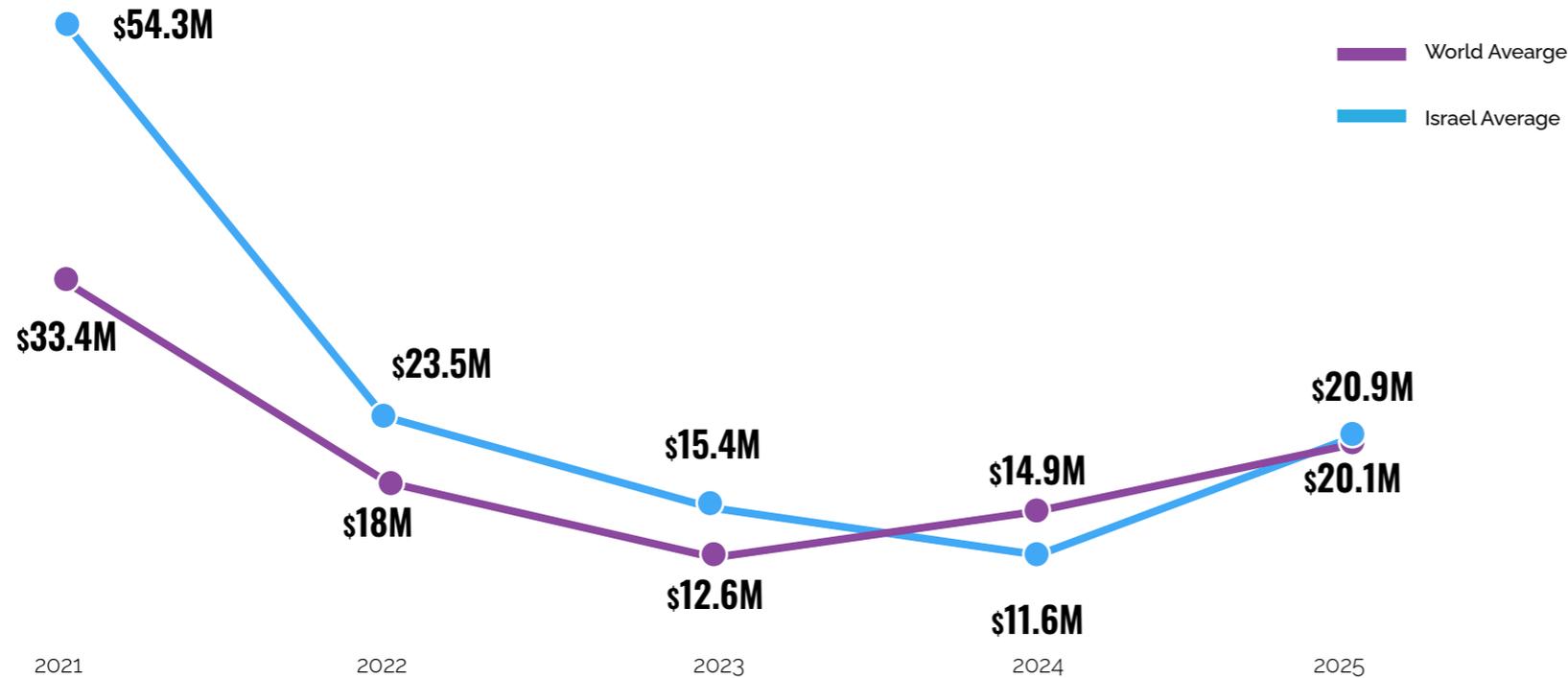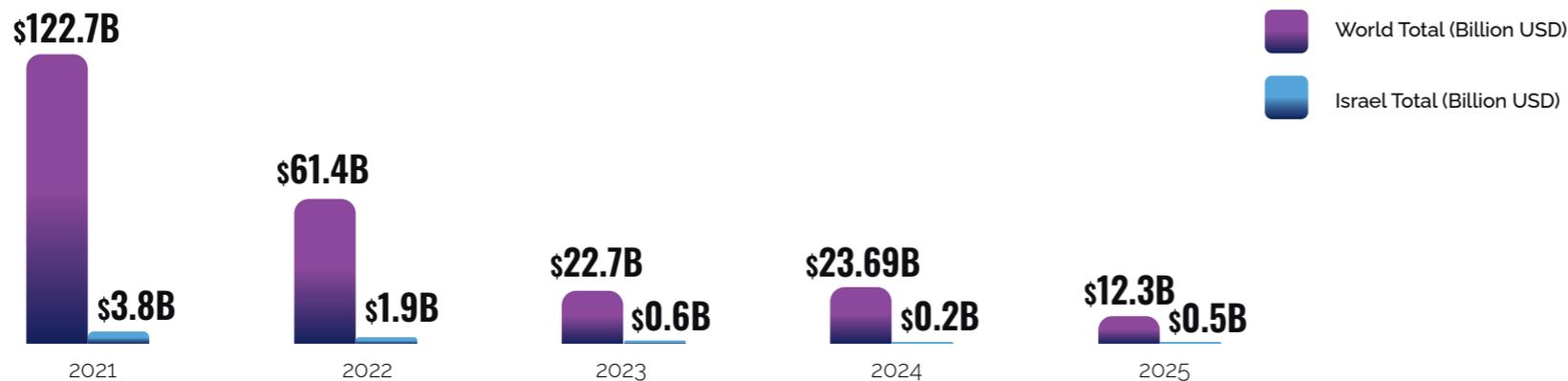|	2021	2022	2023	2024	2025
Israel Median	$10.0M	$10.0M	$5M	$9.5M	$15.0M
World Median	$3.4M	$2.7M	$2M	$2.5M	$3.6M

Source: Re:Tech & Startup Nation Central Finder. Global numbers source: CB Insights

Average Retail Tech Deal Size: Israel vs Global Market (2021-2025)

- **World Avearge**
- **Israel Average**

Israel Average: $54.3M (2021), $23.5M (2022), $15.4M (2023), $11.6M (2024), $20.9M (2025)

World Average: $33.4M (2021), $18M (2022), $12.6M (2023), $14.9M (2024), $20.1M (2025)

2021 2022 2023 2024 2025

Source: Re:Tech & Startup Nation Central Finder. Global numbers source: CB Insights

Israel's Retail Tech Funding in Global Context (Annual, 2021-2025)

- **World Total (Billion USD)**
- **Israel Total (Billion USD)**

Year	World Total	Israel Total
2021	$122.7B	$3.8B
2022	$61.4B	$1.9B
2023	$22.7B	$0.6B
2024	$23.69B	$0.2B
2025	$12.3B	$0.5B

Source: Re:Tech & Startup Nation Central Finder. Global numbers source: CB Insights

The Role of Retail-Specific Local Expertise

As the ecosystem matures and recovers, navigating it has become more complex, not simpler. With hundreds of active retail tech companies embedded within an innovation ecosystem of over 8,000 startups overall, success depends on retail specific insight. Global retailers, brands, and investors benefit most from partners who can:

- Interpret category signals and funding momentum

- Distinguish retail-ready solutions from horizontal technology

- Identify companies aligned with enterprise retail capabilities

Let's Chat

Thomas Sabu

Sr. Director of Digital Engineering at Bj's Wholesale

"

The retail technology ecosystem is heavily concentrated in eCommerce enablement and marketing solutions, reflecting a strong industry bias toward customer-facing capabilities. The lower end of the spectrum—particularly core operational domains—remains constrained by high switching costs and deeply entrenched legacy systems. However, the rapid evolution of AI fundamentally changes this dynamic, creating an inflection point for startups to innovate with greater efficiency, speed, and time-to-market. The next phase of differentiation will be driven by platforms that embed agentic capabilities, enabling cross-functional experiences while materially improving operational intelligence and execution.

A DEEPER LOOK AT ISRAEL'S RETAIL TECH SEGMENTS

Israel's retail tech ecosystem spans several major categories. Each category reflects a distinct layer of the retail value chain, from consumer-facing personalization to back-end logistics and infrastructure.
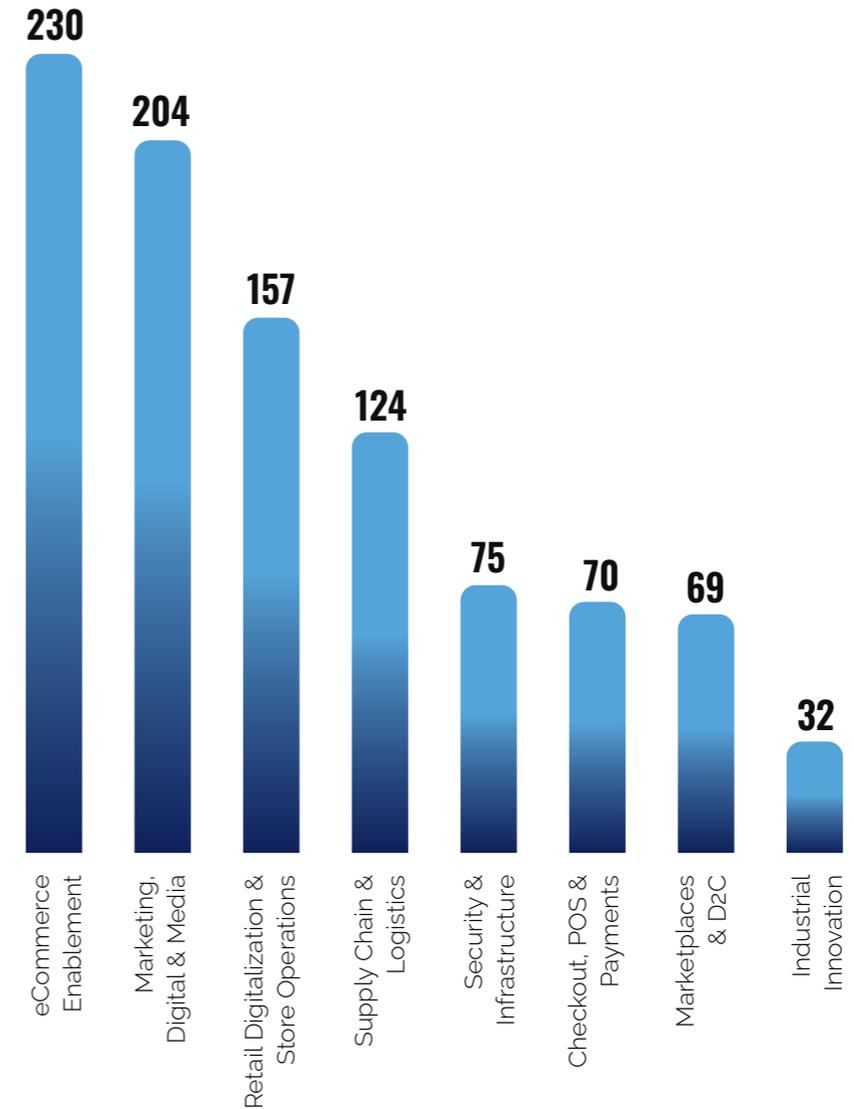
As the ecosystem matures, opportunity is concentrated in companies addressing core operational pain points rather than experimental or peripheral use cases. Across categories, 2025 funding and deal activity show a shift toward efficiency, automation, applied AI, and infrastructure-level resilience, themes that recur throughout the strongest segments.

Category distribution across the 4 leading categories illustrates this balance:

Ecommerce Enablement	Marketing, Digital & Media	Retail Digitalization & Store Ops	Supply Chain & Logistics
23.9%	**21.2%**	**16.3%**	**12.9%**

Note: While the ecosystem comprises 502 unique active companies, individual companies may be categorized across multiple sectors. Consequently, category totals and percentages are based on total accumulated placements rather than the unique company count.

Retail Tech Ecosystem Composition by Category

- eCommerce Enablement: 230
- Marketing, Digital & Media: 204
- Retail Digitalization & Store Operations: 157
- Supply Chain & Logistics: 124
- Security & Infrastructure: 75
- Checkout, POS & Payments: 70
- Marketplaces & D2C: 69
- Industrial Innovation: 32

Source: Re:Tech & Startup Nation Central Finder
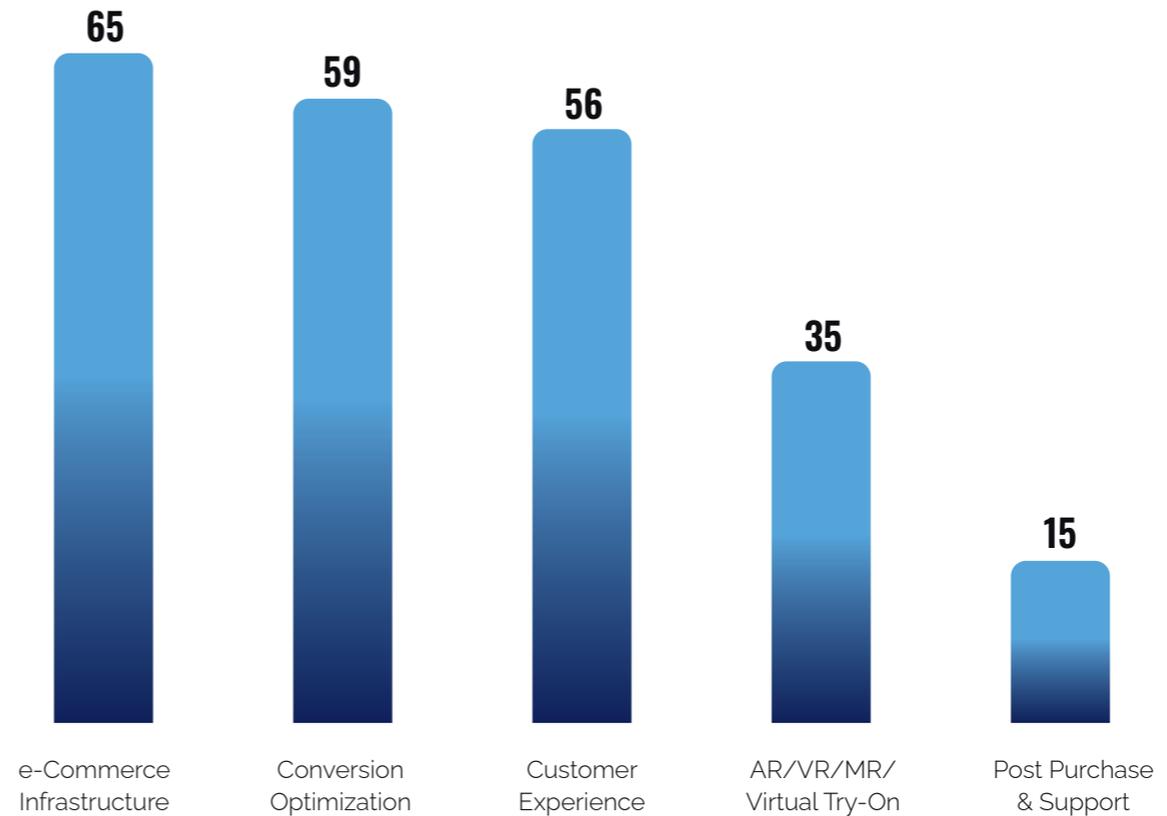
Ecommerce Enablement

Ecommerce Enablement remains a core pillar of the Israeli retail-tech ecosystem and one of the most resilient segments through the downturn, with sustained company activity even as global funding contracted. The category spans platforms supporting DTC, cross-border commerce, merchandising, returns, and operational optimization, and shows a strong concentration of AI-driven use cases, particularly in pricing, personalization, and customer operations, which saw renewed investor interest in 2025.

- **23.9% of total companies** (230 companies)

- **32 acquisitions**, the highest of any category

- **Capital-efficient relative to company count**

- **Notable funding**: Octup ($12M - seed), Rep AI ($8.2M),

- **Exits:** ReturnGO was acquired by Global-e - an Israeli company in 2025, and Pepperi by Advantive in 2024

eCommerce Enablement - Sub-Category Breakdown

Total
230

Sub-Category	Count
e-Commerce Infrastructure	65
Conversion Optimization	59
Customer Experience	56
AR/VR/MR/ Virtual Try-On	35
Post Purchase & Support	15

Source: Re:Tech & Startup Nation Central Finder

Click to view the full category map by SNC

Gil Globus
CEO, saywhatt

"

A key 2025 takeaway, as retail adopted AI- for solutions to be effective they must be customized for specific use cases. The Israeli ecosystem excels at maximizing AI for targeted applications. At saywhatt, we introduced AI expert-level sales assistance for complex products, and are proud to be part of this innovative market.
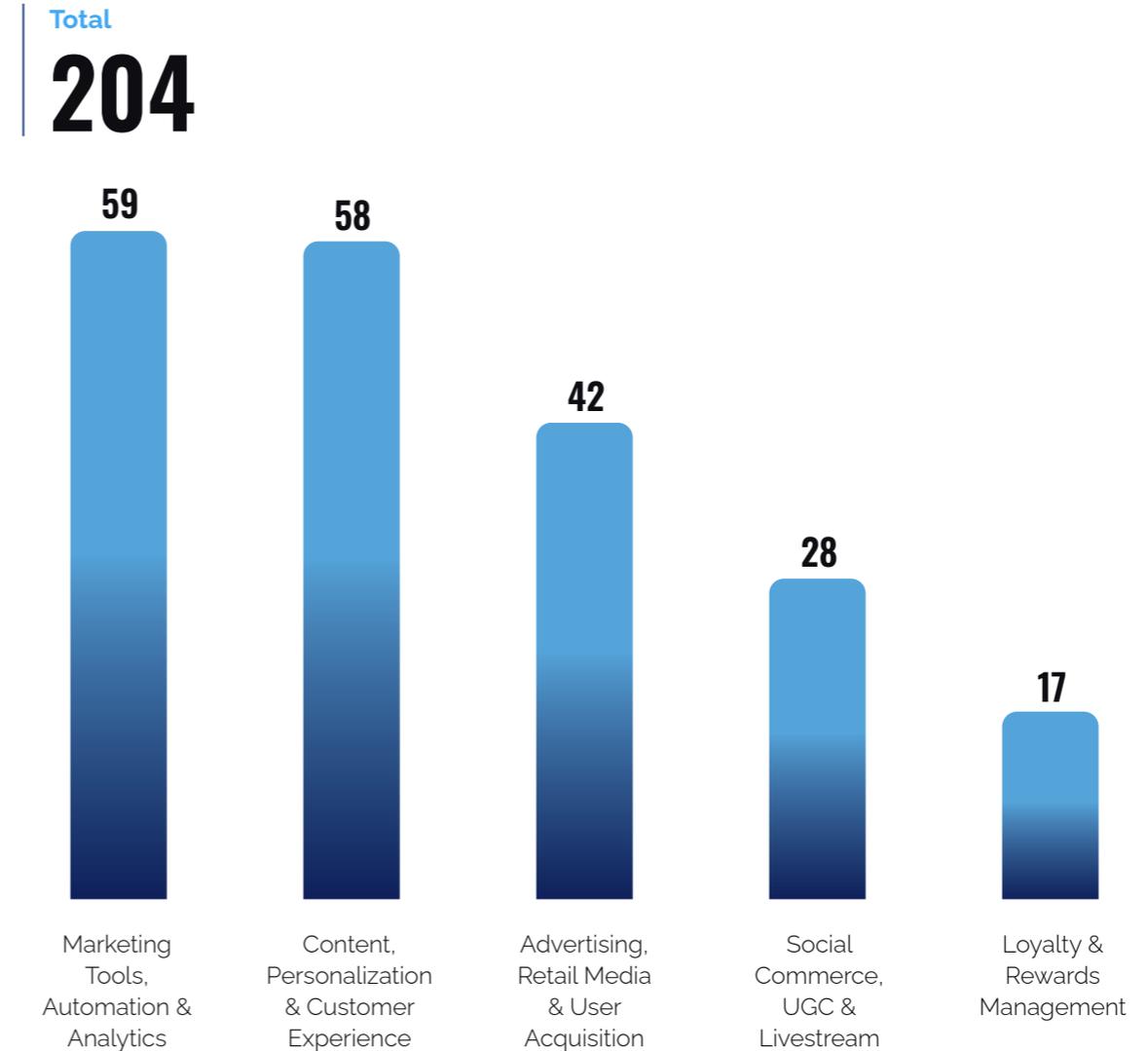
Marketing, Digital & Media

This category encompasses technologies focused on customer acquisition, engagement, personalization, and content across digital channels. It reflects solutions directly tied to retail performance. Examples include personalization platforms, commerce-focused content technologies, and customer engagement tools used by retailers and brands.

AI-powered personalization and content optimization are embedded across this category, with funding momentum favoring platforms that directly influence conversion, retention, and lifetime value.

- **21.2% of total companies** (204 companies)

- **20 acquisitions + 3 IPO's**

- **Lower average capital per company, high exit density**

- **Notable funding:** (Humanz AI $31.1M out of which $15M in Dec 2025), Tastewise ($50M, 2025), Bria ($40M, 2025),

- **Exits:** Anagog (by IntentHQ in 2024), Hour One (by Wix in 2025), Idomoo (IPO)

Marketing, Digital & Media - Sub-Category Breakdown

Total
204

Sub-Category	Count
Marketing Tools, Automation & Analytics	59
Content, Personalization & Customer Experience	58
Advertising, Retail Media & User Acquisition	42
Social Commerce, UGC & Livestream	28
Loyalty & Rewards Management	17

Source: Re:Tech & Startup Nation Central Finder

›› Click to view the full category map by SNC

Shimi Azaria

CEO & Co-Founder, Howazit

" Customer engagement tools only matter when they help retailers and brands act, not just listen. With AI analyzing every interaction, the real advantage is turning engagement into a clear, real-time action plan that drives conversion, loyalty, and recovery.
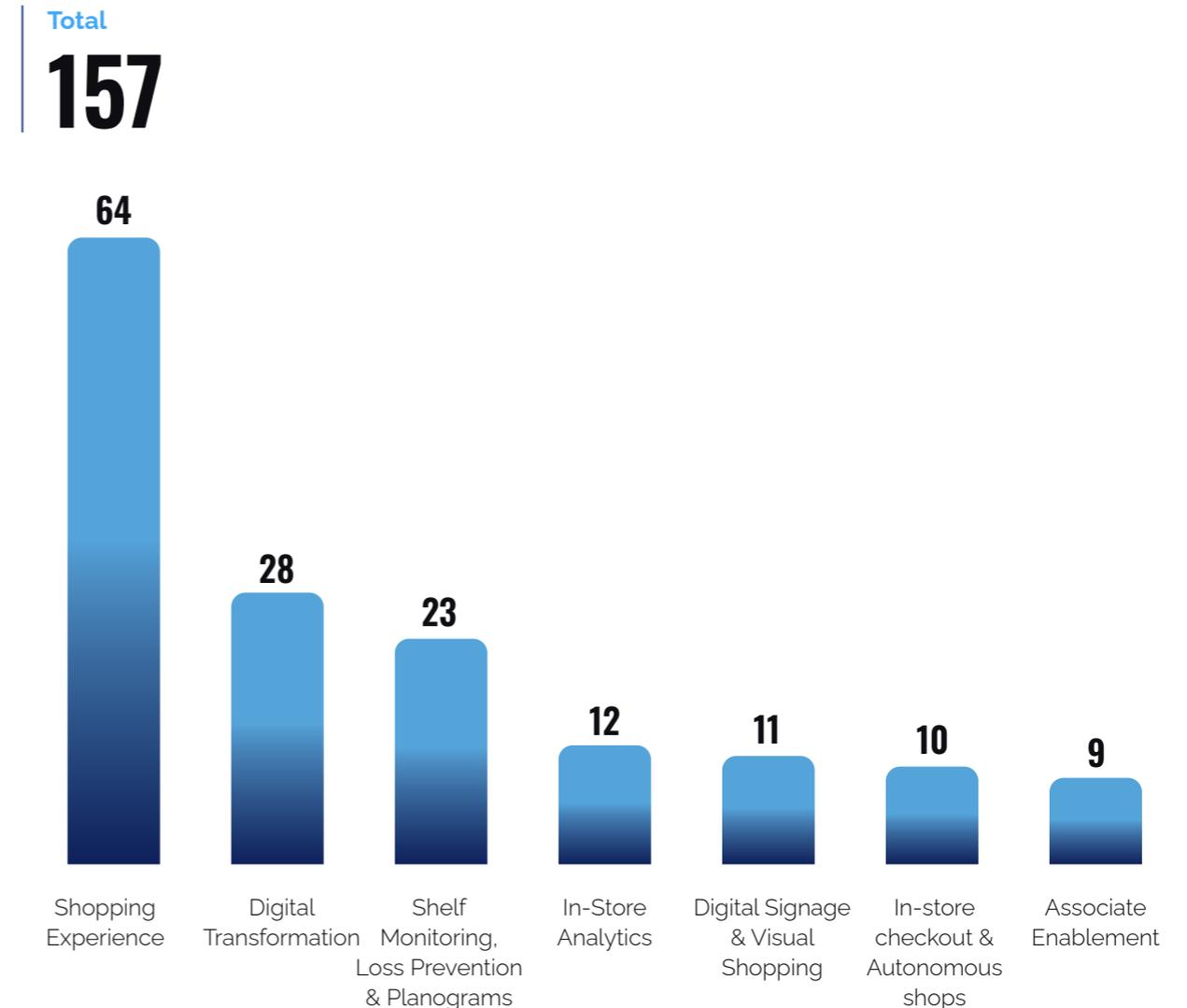
Retail Digitalization & Store Operations

Retail Digitalization & Store Operations includes technologies that enhance physical retail environments, such as in-store analytics, sensor-based insights, and friction reduction at the point of sale. Although physical retail innovation slowed globally during the downturn, this category has not disappeared, but rather narrowed to solutions with clearer operational value. Active companies tend to focus on measurable efficiency gains rather than experimental in-store experiences. Examples include in-store intelligence platforms and technologies designed to connect physical retail data with broader commerce systems.

- **16.3% of active companies** (157 companies)

- **Smaller exit volume, higher hardware intensity**

- **Funding concentrated in fewer, later-stage companies**

- **Notable funding:** Lumana raised 24M in 2024 and another 40M in 2025, Vayyar raised $25M in 2024, bringing its total funding to $323M and Hi Auto secured $15M in 2025.

- **Exits:** Memomi Labs (acquired by Walmart in 2022)

Retail Digitalization & Store Operations - Sub-Category Breakdown

Total
157

Shopping Experience	Digital Transformation	Shelf Monitoring, Loss Prevention & Planograms	In-Store Analytics	Digital Signage & Visual Shopping	In-store checkout & Autonomous shops	Associate Enablement
64	28	23	12	11	10	9

Source: Re:Tech & Startup Nation Central Finder

Click to view the full category map by SNC

Ariel Hubara
Founder & CEO, AlgoRetail

Poor inventory management costs retailers twice: lost sales from out-of-stocks and shrinkage from excess stock. Algoretail solves this by predicting required inventory, auto-ordering from distributors, and building dynamic planograms, to improve On-Shelf Availability and boost store performance

Ohad Elzur
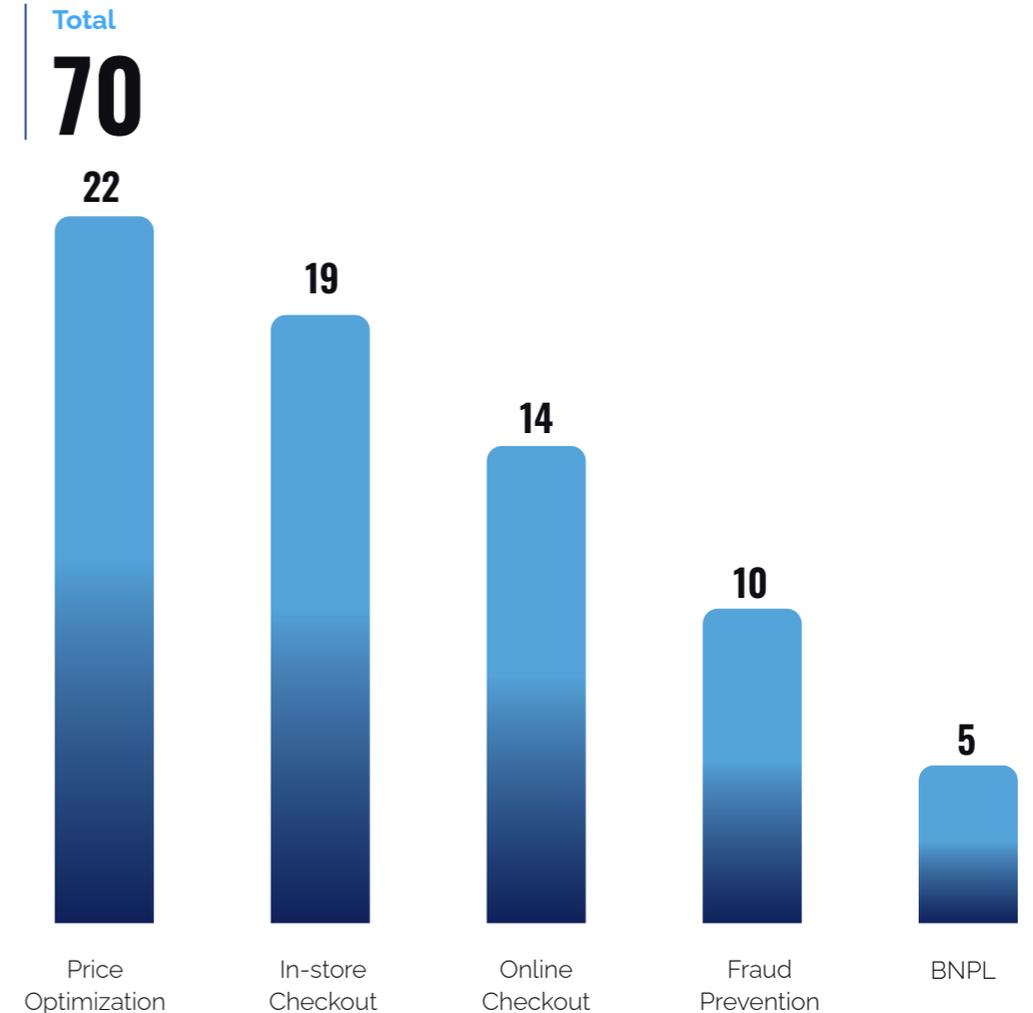**Store & Promotion Technology Director at AS Watson**

Many retailers are still working to balance digital in-store experiences with measurable operational efficiency. As the report highlights, the focus has shifted toward solutions that deliver clear operational value. We see a strong connection between customer experience and automation - our 'connected store' vision brings POS, shelf labels, and screens into one ecosystem that improves the shopper journey while enabling near real-time, data-driven store operations. There is still significant untapped potential in this space.

Checkout, POS & Payments

This segment covers transaction infrastructure, payment enablement, and systems that support seamless checkout experiences across channels.
It continues to stand out as capital-intensive but structurally important, reflecting its role as foundational infrastructure for retail operations. Even during funding contractions, companies in this space maintained relevance due to their direct impact on revenue flow and customer experience.
The category also plays a key role in enabling cross border commerce, supporting international payments, compliance, and multi-region expansion for global retailers. Examples include payment platforms, loyalty-linked checkout systems, and transaction enablement technologies.

- **7.3% of active companies** (70 companies)

- **Highest average capital raised per company**

- **Fewer companies, disproportionate share of total funding**

- **Notable funding:** ChargeFlow - raised $35M in Nov 2025, led by Viola Growth

- **Exits / IPOs:** Quicklizard was acquired by Riverwood Capital in 2025, Nayax IPO'd in Tel-Aviv in 2021 and then in the Nasdaq in 2024

Checkout, POS & Payments - Sub-Category Breakdown

Total
70

Price Optimization	In-store Checkout	Online Checkout	Fraud Prevention	BNPL
22	19	14	10	5

Source: Re:Tech & Startup Nation Central Finder

Click to view the full category map by SNC

Re:Tech | STARTUP NATION CENTRAL | MOONSHOT AI | metriko.ai

Lanor Daniel
CEO, Shopper AI

"

As retail tech evolves toward more autonomous, execution-driven AI, value is defined by speed and ROI. AI systems that act, not just observe, are redefining physical retail.

ShopperAI fits this shift by turning existing store infrastructure into autonomous, real-time floor intelligence that protects revenue at scale.
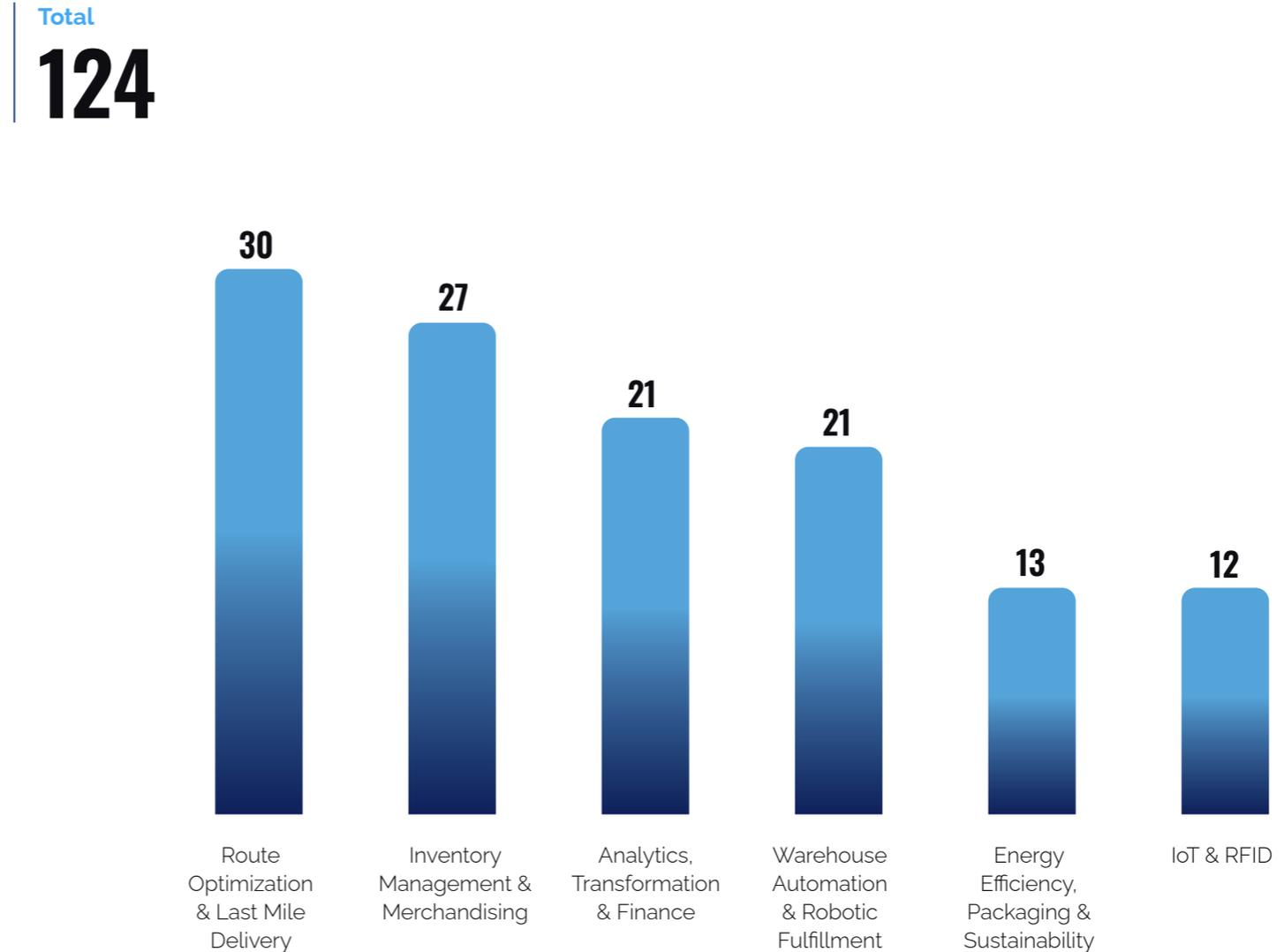
Supply Chain & Logistics

This category includes inventory optimization, fulfillment intelligence, forecasting, and operational analytics tied to product movement. It is one of the most operationally resilient, and companies that remain active tend to focus on predictive capabilities, efficiency gains, and visibility across complex supply chains. Examples include inventory intelligence platforms and logistics optimization solutions serving retailers and retail-adjacent supply chains.

- **12.9% of active companies** (124 companies)

- **Balanced exit profile: acquisitions + IPOs**

- **Strong predictive analytics and automation focus**

- **Notable funding**: aiOla ($25M in 2025) Capow ($15M), Onebeat ($15M), Package.AI ($14M)

Supply Chain & Logistics - Sub-Category Breakdown

Total
124

Bar chart values:
- Route Optimization & Last Mile Delivery: 30
- Inventory Management & Merchandising: 27
- Analytics, Transformation & Finance: 21
- Warehouse Automation & Robotic Fulfillment: 21
- Energy Efficiency, Packaging & Sustainability: 13
- IoT & RFID: 12

Source: Re:Tech & Startup Nation Central Finder

Click to view the full category map by SNC

Marketplaces & Direct-to-Consumer (DTC)

This category includes consumer-facing brands, vertical marketplaces, and platforms built around direct relationships with end customers. The segment focuses on companies with clear retail or commerce infrastructure relevance and demonstrates strong international orientation and cross-border capabilities. Cross-border enablement, international logistics, and global marketplace integrations are defining characteristics of this segment. Examples include Israeli-founded DTC brands and marketplace platforms operating globally.

- **7.2% of active companies** (69 companies)

- **Smaller category by count**

- **High international orientation**

- **Capital intensity varies widely**

- **Notable funding:,** GlassesUSA - global DTC brand out of Israel, raised $45M in 2023 and $95M in total, selling in the US across their online platform and opened their first physical stores in 2025; Resident Home - a DTC brand with team in Israel and Silicon valley, raised a total of $140.5M and was acquired by Ashley Home in 2024 for $1B and Tulu raised $17M in 2025.

⟫ Marketplaces & D2C - Sub-Category Breakdown

Total
69

Bar chart:
- Marketplaces: 51
- D2C Brands: 18
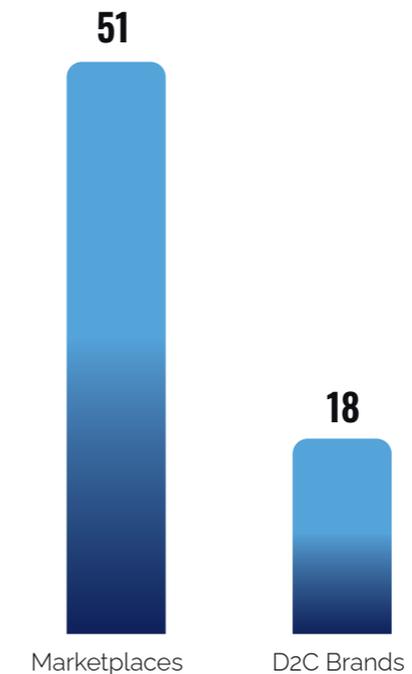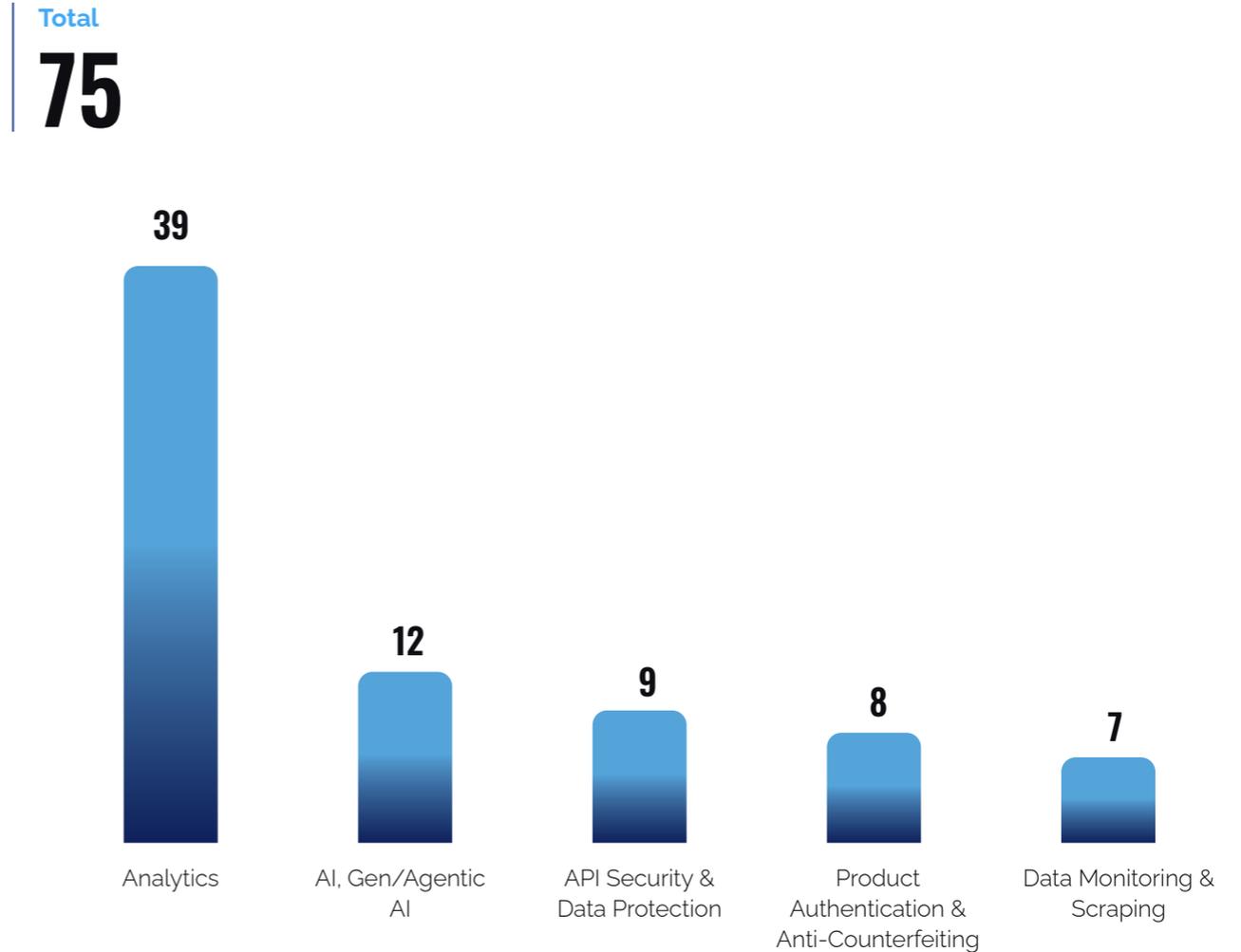
Source: Re:Tech & Startup Nation Central Finder

⟫ Click to view the full category map by SNC

Security & Infrastructure

This category includes cybersecurity, data protection, and backend systems that enable secure, scalable commerce operations. It focuses on retail-relevant infrastructure, and companies play a role as enablers of omnichannel retail and cross-border operations. Examples include infrastructure and security platforms deployed by retailers and commerce platforms.

- **7.8% of active companies** (75 companies)

- **Second-highest average capital per company**

- **16 acquisitions**

- **Large rounds materially impact annual funding totals**

- **Notable funding:** Sentra, a company helping retailers (among other industries) protect their cloud data, raised $50M in 2025

- **Exits:** Anodot, focused on anomaly detection for industries such as e-commerce and serving brands like Puma, was acquired by Glassbox in 2025

Security & Infrastructure - Sub-Category Breakdown

Total
75

Analytics	AI, Gen/Agentic AI	API Security & Data Protection	Product Authentication & Anti-Counterfeiting	Data Monitoring & Scraping
39	12	9	8	7

Source: Re:Tech & Startup Nation Central Finder

Click to view the full category map by SNC

Achishay Buchnik
Founder, Metriko

"

AI forecasts for retail are easy to inflate and hard to trust. The real opportunity lies in infrastructure platforms that connect retailers and AI models. Each retailer integration strengthens the models, and each model capability strengthens retailers, creating compounding network effects and durable advantage across operations, performance, and natural expansion.

Industrial Innovation

This category covers design technologies, advanced manufacturing solutions and new materials around production, packaging and retail-adjacent industrial operations. Sustainability and material efficiency are important too, as retailers and brands often seek to reduce environmental impact while improving scalability. Examples include companies developing novel materials, smart manufacturing processes, and sustainability led solutions serving retail supply chains.

- **3.3% of active companies** (32 companies)

- **Smaller company base**

- **Above-average capital intensity**

- **Focused on design and manufacturing, packaging and new materials**

- **Notable funding:** UBQ Materials raised $70 in 2022 and $240M in total for sustainable packaging, Kornit Digital is a public company with many global clients, focused on on-demand manufacturing

Industrial Innovation - Sub-Category Breakdown

Total
32

13 — Design & Manufacturing
11 — Energy Efficiency & Sustainability
8 — Textile & Apparel Innovation
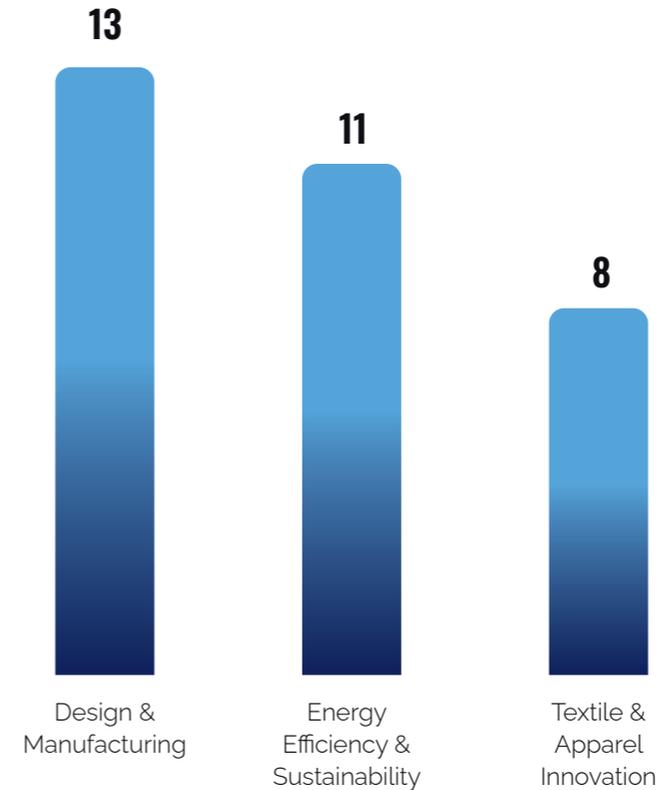
Source: Re:Tech & Startup Nation Central Finder

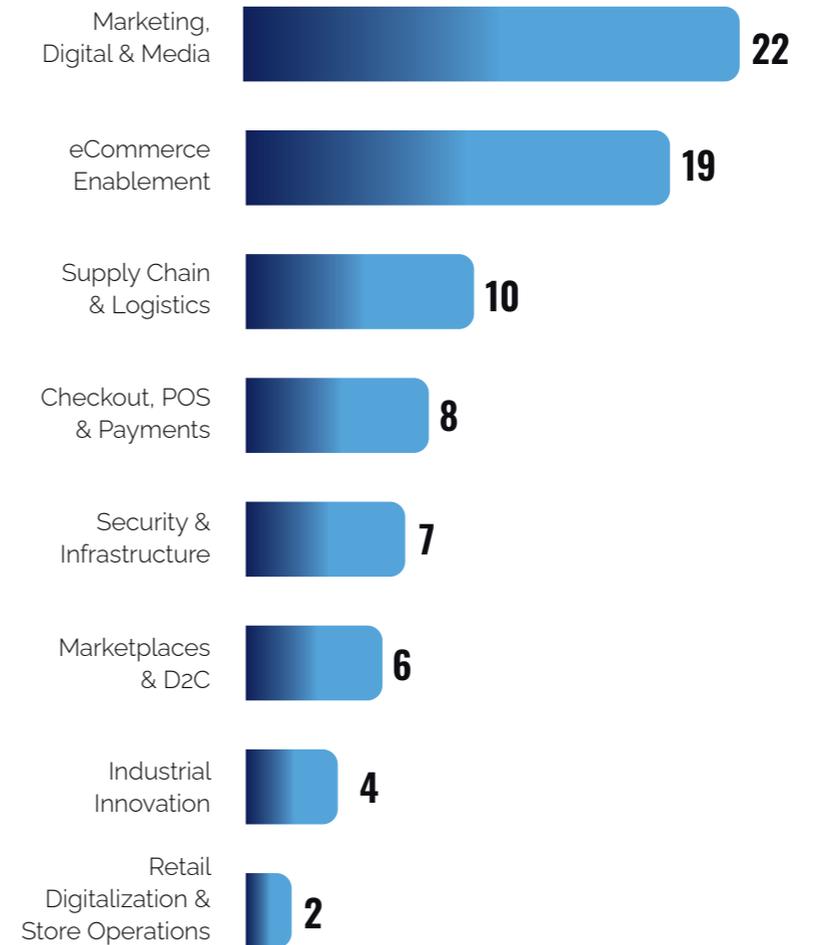Click to view the full category map by SNC

Capital Efficiency: Relative to other Israeli sectors such as cyber or fintech, retail tech funding is typically deployed later and more deliberately. While cyber often leads in headline-grabbing rounds, retail tech shows stronger alignment between capital deployment and commercial adoption. Capital efficiency varies meaningfully by category:

- Checkout, POS & Payments and Security & Infrastructure have the highest average capital raised per company, reflecting infrastructure-heavy models and longer deployment cycles

- Retail Digitalization & Store Operations also shows higher capital intensity due to hardware, sensors, and physical deployment requirements

- Ecommerce Enablement and Marketing, Digital & Media operate with lower average capital per company, yet account for a disproportionate share of active companies and exits - indicating strong commercial traction achieved with comparatively lean funding

What This Means: Overall, Israel's retail tech ecosystem is no longer defined by breadth alone. Overall, it is characterized by focused depth across core retail functions, ecommerce operations, analytics, payments, logistics, and infrastructure.

Key Takeaway for Global Stakeholders: The opportunity lies not in scanning the entire ecosystem, but in navigating it with precision. Given the density of startups and the overlap with other tech verticals, retail-specific local expertise is often the difference between discovering generic technology and identifying solutions that deliver measurable retail impact.

≫ Retail Tech Exits by Main Category (2019–2025)

Category	Exits
Marketing, Digital & Media	22
eCommerce Enablement	19
Supply Chain & Logistics	10
Checkout, POS & Payments	8
Security & Infrastructure	7
Marketplaces & D2C	6
Industrial Innovation	4
Retail Digitalization & Store Operations	2

Source: Re:Tech & Startup Nation Central Finder

OPPORTUNITIES FOR RETAILERS & BRANDS: WHERE TO PLACE YOUR BETS IN ISRAELI RETAIL TECH

For retailers, brands, and investors, the next wave of opportunity lies in identifying categories that are both resilient and globally scalable. Israel's ecosystem maturity makes it especially attractive.

Retailers looking to engage with Israeli retail tech should focus on:

- Categories with demonstrated momentum and exits, such as Ecommerce Enablement, Marketing, Digital & Media and Security & Infrastructure
- Solutions already deployed in complex global retail environments
- Platforms designed for integration, not experimentation

With hundreds of active retail tech companies operating within a broader startup ecosystem of over 8,000 ventures, effective engagement depends on filtering relevance rather than maximizing exposure.

⨠ Funding Heatmap by Category and Year (USD)

	2019	2020	2021	2022	2023	2024	2025
Retail Digitalization & Store Ops	147M	116M	904M	391M	1M	49M	55M
Marketing, Digital & Media	26M	496M	450M	289M	41M	63M	157M
Supply Chain & Logistics	3M	60M	611M	295M	287M	17M	99M
Checkout, POS & Payments	32M	207M	929M	179M	29M	25M	35M
eCommerce Enablement	41M	170M	250M	298M	56M	24M	50M
Security & Infrastructure	15M	90M	59M	196M	143M	10M	50M
Industrial Innovation	31M	12M	462M	10M	4M	0	0
Marketplaces & D2C	2M	3M	130M	180M	500K	0	17M

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Key signals for investors include:

- Concentration of capital in fewer, higher-quality companies

- Strong activity in mid- to late-stage rounds

- Clear exit pathways in Ecommerce Enablement, Marketing, Digital & Media and Infrastructure

Given the funding rebound in 2025, which we discussed, the market has entered a new cycle and companies reaching funding inflection points typically fall within the 8–15 year maturity window, aligning with scale-up investment strategies.
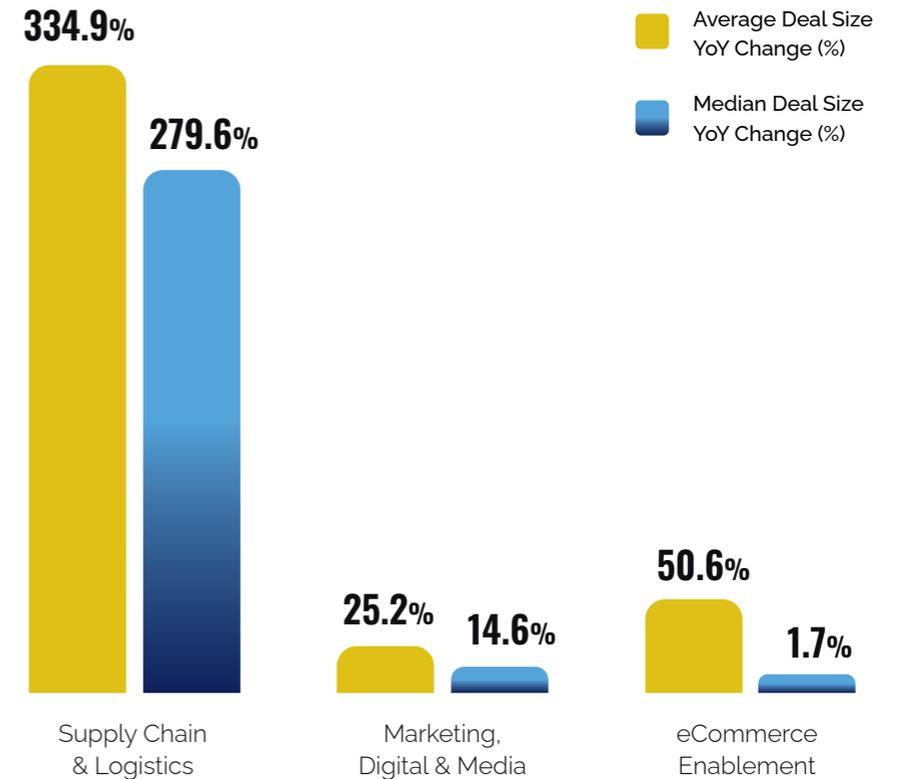
The Importance of Retail-Specific Local Expertise

While Israel has no shortage of local partners, accelerators, and innovation hubs, retail-specific expertise remains scarce, as:

- Retail tech is increasingly specialized

- Many solutions sit at the intersection of retail, AI, infrastructure, and enterprise software

- Misclassification risk is high without deep domain knowledge

For global stakeholders, working with partners who understand retail operations, buying cycles, and deployment realities is critical to identifying solutions that can scale beyond pilot phases.

Leading Categories in 2025 - YoY Change in Deal Size (vs. 2024)

Average Deal Size YoY Change (%)

Median Deal Size YoY Change (%)

Category	Average Deal Size YoY Change (%)	Median Deal Size YoY Change (%)
Supply Chain & Logistics	334.9%	279.6%
Marketing, Digital & Media	25.2%	14.6%
eCommerce Enablement	50.6%	1.7%

Source: Re:Tech & Startup Nation Central Finder

THE TOP 100
ISRAELI RETAIL TECH COMPANIES

The Israeli Retail & Commerce Tech Top 100 Map

Re:Tech

Supply Chain, Manufacturing & Logistics

balena. | BRINGG | Belle. | flymingo | Pickommerce | CaPow
Makologic | ubq | Chainlane | NEOLITHICS | PaperWeight AI | wiliot | DLRA
eHouse Studio | fabric | 8fig | FLYTREX | FREIGHTOS
TODOS | onebeat | xpand | octup | DELIVERIDER | Harmonya

Checkout, POS & Payments

FORTER | Cust²Mate | CHARGEAFTER | FUGU
QUICKLIZARD | chargeflow | Jifiti
hoox | riskified | sensepass

Retail Digitalization & Store Operations

Depoint | nexite | Jukee | SUPERSMART
arpalus | CLARIFRESH | Shopic
oriient | STOREE | Algoretail | SHOPPER AI
trax BY FORM | Bites | easyteam | trigo

Marketing, Digital & Media

Catch | Alison.AI | Revuze | howazit | ADAPT
D-ID | adge | feelter | buywith_ | BRIA | snappy
ANAGOG | SAGARMATHA | OPTIMOVE | EIKONA
APP CARD | rulrr | renovai | the next generation shopper | yotpo.

Data & Infrastructure

Placer.ai | Pecan | Globale
empact | browzwear | metriko.ai

eCommerce Enablement

BOTIKA | saywhatt | Cloudinary | Dialogue
echo3D | kimonix | Shopeaks | cymbio
AUTO-DS | Tymely | tangiblee | KANDUAI
wandz.ai | dynamic yield | SpeedSize | r23 | karma
syte | LOOX | MOONSHOT AI | pretty damn quick
REP | RETURNGO | Triple Whale | twik

Re:Tech TOP 100 RETAIL TECH 2025/6

About Our Top 100 Retail Tech Initiative

The **Top 100 Israeli Retail Tech** initiative highlights the companies shaping the future of global commerce through applied, retail-focused innovation. Israel's retail tech ecosystem has long stood out for its ability to translate advanced technologies into practical, scalable solutions, and the Top 100 reflects this strength across the full retail value chain.

The selected companies span all the categories we have covered in this report. The list emphasizes real-world retail applicability, commercial traction, and global scalability, rather than experimentation alone. Together, the Top 100 represents not just innovation breadth, but a curated view of the companies best positioned to deliver measurable impact across global retail environments. The list of the Top 100 Retail Tech was selected from a list of companies who applied for the list by an esteeemed comitte of gloabl judges (see next page for the full list).

Our Global Selection Committee

Adi Lev
Corporate level VP at Flipkart, GM Israel - AI and Engineering

DeAnn Campbell
Chief Strategy Officer, Storewyse

Henry Chen Weinstein
CEO at Avolta NEXT, Avolta

Nino Bergfeld
Chief Customer Office - Retail & CG Lead, Salesforce

Shiri Mosenzon Erez
Chief Product Officer, commercetools

Ariel Finkelstein
Partner at TeamX and Inovo VC

Dmitry Olerinskiy
Global Director of Digital Strategy, Decathlon

Kevin Ertell
Founder, CEO & Principal Consultant at Mistere Advisory

Ohad Elzur
Store & Promotion Technology Director at AS Watson

Shlomit Pinkas Elkaiam
Seriel Retail Entrepreneur and Investor at Neo Ideas

Carl Boutet
Retail Expert, Founder, Chief Strategist & Executive Advisor at Studio RX

Elaine Barsoom
AI & Technology Innovation Leader | Former Head of AI & Tech Innovation Partnerships, Nike | Venture Partner, Silicon Foundry

Matt Nichols
General Partner at Commerce Ventures

Ravi Kanniganti
Emerging Technologies and Innovation Consultant

Steve Dennis
Retail Influencer and Best-selling author of Remarkable Retail

Celso Borges Shimabukuro
Head of Digital Commerce Europe at Mondelēz International, Former LEGO, PepsiCo, J&J and Samsung

Eldad Rothman
Co-Founder & COO at GlassesUSA

Michael Mitrani
VP E-commerce, Innovation and Marketing at Super-Pharm

Ross Arnone
Head of Product, Tesco Labs, at Tesco

Toot Shani
Founder & Managing Partner at Sarona Ventures

Clifford Cohen
CTO at Segen and Soligent, Former CTO at Asos

Guy Rosenhoiz
Chairman, GLOW Payments

Mirko Saul
SVP Innovation at Schwarz Digital

Sabu Thomas
Sr. Director of Digital Engineering at Bj's Wholesale Inc.

Yaron Jacobs
Head of Ecommerce and Distance Retail - Europe at Triumph

David Matthews
Managing Director at RevTech Ventures

Guy Yehiav
President at SmartSense by Digi

Final Thoughts

Israel retail tech has turned a new corner.

From the rapid buildup of 2017–2019 and the record-breaking funding of 2021, through a reset in 2022–2024. After years of contraction, 2025 marks a turning point, with funding doubling year-over-year and deal activity rebounding across multiple categories.

This marks a clear transition from contraction to recovery.

The recovery stands out because unlike ecosystems that faltered during downturns, Israel's retail tech industry demonstrated resilience: survival rates remained high, funding efficiency outpaced global averages, and deal sizes consistently commanded a premium. Some categories continue to lead the way in terms of exits, global adoption and investor confidence. Meanwhile emerging trends in automation and applied AI signal where the next wave of value will be created.

What sets Israel apart is not just its technological strength, but its ability to repeatedly deliver despite geopolitical and economic challenges. For global retailers and brands, Israeli startups offer immediate opportunities to improve personalization, automate operations,

and strengthen resilience. For investors, it means access to mature, scale-ready companies capable of producing both strategic and financial returns.

Capturing this value, however, requires precision. For global companies, having a local partner is the key to navigating the cultural, structural, and operational nuances of this ecosystem. The Israeli ecosystem spans over 8,000 startups across many verticals, and **only a partner with specific knowledge of retail technology can separate general innovation from solutions that directly move the needle for retailers and brands.** The right guidance ensures you can access the most relevant startups, build productive relationships, and capture the full value of Israeli retail tech innovation.

Now is the time to act. The rebound of 2025 signals the start of a new cycle in 2026 and beyond. Engaging with Israeli retail tech today means partnering with companies that will define the next era of commerce tomorrow.

METHODOLOGY & ABOUT

METHODOLOGY

Report Scope

The analysis covers Israeli retail technology companies founded between 1977–2025. Geographic scope is limited to companies headquartered in Israel.partnering with companies that will define the next era of commerce.

Data Sources & Collection

- Primary data was sourced from Startup Nation Central Finder, Israel's most comprehensive startups database. Additional and supplementary information was collected from Crunchbase, LinkedIn, and official company websites.

- The list of companies was manually curated and categorized using a retail technology taxonomy developed for this report by Re:Tech.

- For global market comparisons, data was drawn from the CB Insights Venture Reports for 2024 and 2025.

- For Israeli tech market benchmarking, the Startup Nation Central Annual Reports for 2024 and 2025 was referenced.

Data Limitations & Assumptions

- Funding data is available on a per-year basis for 2019–2025. Each company is assumed to have no more than one funding deal per year due to the reporting structure.

- The dataset represents a snapshot as of December 31, 2025.

- Some funding rounds remain undisclosed and therefore are not included in deal size calculations.

Classification & Definitions

- Companies were manually classified into retail technology categories and sub-categories.

- Active companies are defined as those with ongoing operations as of the report cut-off date.

- Funding includes private investment rounds (Seed, Series A–G, and convertible instruments).

- Exit events include IPOs, acquisitions, and other liquidity outcomes.

- Deal sizes reflect only disclosed amounts; undisclosed rounds are excluded from average/median size analysis.
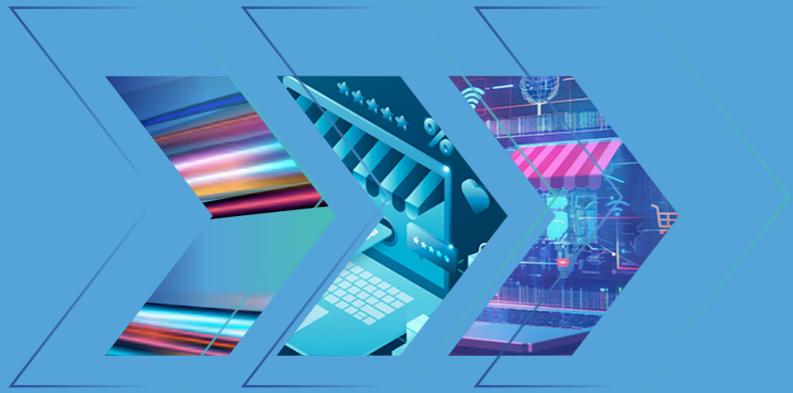
Top 100 Startups Methodology

- The Top 100 list was developed through a combination of company applications and aggregated ecosystem research drawn from the Re:Tech database and broader market analysis.

- Companies were evaluated by a selection committee composed of experienced investors, retail leaders, and technology executives, bringing complementary perspectives from across the retail and innovation landscape.

- Each company was reviewed by multiple committee members from different professional backgrounds, ensuring a balanced and bias-aware assessment.

- Evaluation criteria focused on retail relevance, solution maturity, market traction, and alignment with the operational and strategic priorities of global retailers and brands.

About the Editor

Yael Kochman
CEO, Re:Tech Innovation Hub

Yael Kochman is the CEO of Re:Tech, a leading retail technology hub. With extensive experience at the intersection of retail and technology, Yael has worked with global retailers and brands to design innovation strategies and connect them with cutting-edge retail tech companies. She has been chosen by the National Retail Federation (NRF) as one of the top "Voices in Retail" from all over the world and is acknowledged as a Top Retail Expert by RETHINK Retail. She was also selected as one of 40 under 40 by The Marker and one of the top 100 Retail Tech Leaders by Retail Week. She is passionate about helping companies navigate the retail tech ecosystem and leverage in depth understanding of corporate innovation and partnership mindset to create real business impact.

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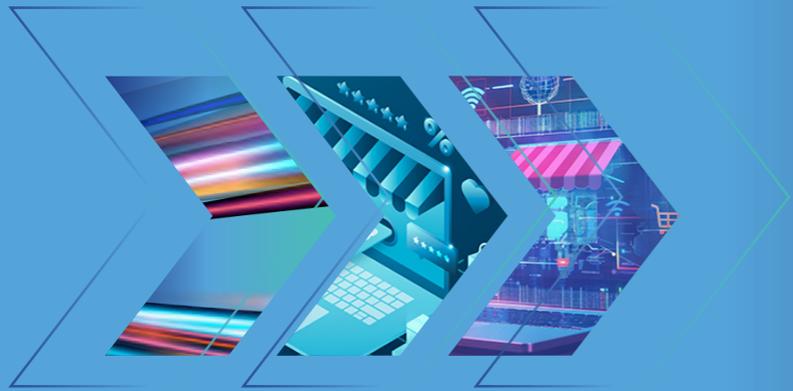## Max Klaber
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Special thanks to our team of researchers, designers and interns: Dor Shoshan, Yuval Ehrlich, Amit Corney, Lena Brook

About Re:Tech

Re:Tech is a globally recognized retail tech innovation hub working with leading retailers and brands to shape the future of commerce. With deep expertise in both enterprise retail and emerging technologies, Re:Tech bridges the gap between corporate ambition and startup innovation. Through a powerful global network of retail tech companies and entrepreneurs, we help organizations accelerate innovation and unlock meaningful, measurable impact

We live and breathe innovation. We understand retail. And we know how to bridge the gap between corporate needs and emerging solutions.

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Startup Nation Central is a free-acting NGO providing global solution seekers frictionless access to Israel's bold and impatient innovators to help tackle the world's most pressing challenges. Our free business engagement platform, Finder, grants unrestricted access to real-time, updated information and deep business insights into the Israeli tech ecosystem.

About Moonshot

Moonshot AI transforms static websites into self-evolving, self-optimizing beings. Our no-code platform uses generative AI to autonomously improve digital experiences, eliminating the need for developers, designers, or analysts.

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About Metriko

Metriko is an AI-native retail infrastructure platform that lets retailers of any size turn their existing tech stack into an agentic retail OS. Its incremental data and orchestration layer makes it easy to build and run AI agents, AI apps, and AI-powered studio and media experiences directly on top of current systems—without rebuilding the underlying stack.

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