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Report Highlights:

Post projects Israel's wheat imports for marketing year 2026/27 at 2.15 million metric tons, the same as the previous marketing year, as consumption and production remain relatively stable. Corn imports are estimated to increase slightly, on account of a strong poultry and egg industry. Barley imports and consumption are expected to remain relatively low, as the feed industry is expected to continue to prioritize wheat and corn for its animal feed.

Executive Summary

This report provides an overview of Israel's wheat, corn, and barley markets for marketing year (MY) 2026/27, with limited change on production, consumption, trade, and relatively low stock. Israel remains heavily dependent on grain imports to meet domestic demand. Approximately 90 percent of Israel's grain supply is sourced from abroad.

For wheat, Israel produces only about 10 percent of its annual milling wheat requirements, with production forecast at 60 thousand metric tons (TMT) for MY 2026/27, as poor weather conditions and farmland affected by the conflict have not fully recovered. Total wheat consumption is estimated at 2.3 million metric tons (MMT), with an increase in forecasted home baking that partially offsets seasonal declines during Passover. Wheat imports are forecast at 2.15 MMT, with 70-80 percent sourced from Russia, followed by Ukraine and Romania due to competitive prices and shorter shipping routes. The government is actively working to diversify import sources beyond the Black Sea region; however, achieving price competitiveness remains a significant challenge. There are currently no tariffs on U.S. wheat.

Israel does not produce corn and is entirely import-dependent, with consumption forecast at 1.47 MMT for MY 2026/27, driven primarily by the poultry and egg sectors. Corn imports are expected to reach 1.45 MMT, with the United States regaining market share due to competitive pricing. The United States also supplies approximately 80 percent of Israel's distillers dried grains with solubles (DDGS) and corn gluten feed (CGF) imports, used primarily in the dairy sector. There are currently no tariffs on U.S. corn.

Barley production is forecast at 14 TMT on 5,000 hectares, with consumption expected to decline slightly to 300 TMT, for primary use in sheep and goat feed. Barley imports are forecast at 290 TMT, sourced mainly from the European Union (EU), Ukraine, and Russia. There are currently no tariffs on U.S. barley.

On January 26, 2026, the Knesset (Israeli Parliament) approved legislation requiring major wheat and feed inventory holders to submit monthly reports to enhance transparency and improve emergency preparedness. All the meanwhile, Israel continues expanding grain storage capacity to strengthen food security amid ongoing regional instability.

Wheat

Wheat	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jul 2024		Jul 2025		Jul 2026	
Israel	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	45	45	45	40	0	40
Beginning Stocks (1000 MT)	541	541	455	556	0	461
Production (1000 MT)	80	80	90	60	0	60
MY Imports (1000 MT)	2050	2100	2250	2150	0	2150
TY Imports (1000 MT)	2050	2100	2250	2150	0	2150
TY Imp. from U.S. (1000 MT)	1	0	0	0	0	0
Total Supply (1000 MT)	2671	2721	2795	2766	0	2671
MY Exports (1000 MT)	6	5	5	5	0	5
TY Exports (1000 MT)	6	5	5	5	0	5
Feed and Residual (1000 MT)	900	1000	950	1050	0	1000
FSI Consumption (1000 MT)	1310	1160	1320	1250	0	1300
Total Consumption (1000 MT)	2210	2160	2270	2300	0	2300
Ending Stocks (1000 MT)	455	556	520	461	0	366
Total Distribution (1000 MT)	2671	2721	2795	2766	0	2671
Yield (MT/HA)	1.7778	1.7778	2	1.5	0	1.5

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Wheat begins in July for all countries. TY 2026/2027 = July 2026 - June 2027

OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query

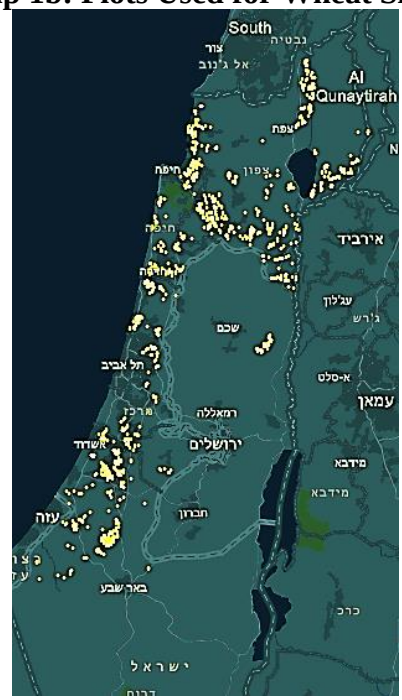
Production:

Israel relies heavily on wheat imports to meet domestic demand, producing only about 10 percent of its annual milling wheat requirements. For MY 2026/27 (July–June), Post forecasts wheat production to remain stable at 60 TMT, as poor weather conditions and farmland in certain areas affected by the Israel-Hamas conflict have not fully recovered, particularly in the Gaza periphery.

Roughly 70 percent of Israeli wheat is planted in the south, with the remainder planted in the central and northern regions (see Maps 1a and 1b). Average rainfall in the southern wheat producing regions generally reaches 450 millimeters (mm) per year, while the northern regions receive 500-550 mm per year, primarily from October to April. In Israel, wheat is generally planted in November and harvested in late April through early June.

Map: 1a: Plots Used for Grain Wheat

Map 1b: Plots Used for Wheat Silage



Source: MoAFS GIS maps

Consumption:

Total wheat consumption in MY 2026/27 is estimated at 2.3 MMT, the same as MY 2025/26, as the feed sector is forecast to decline, while the food, seed, and industrial (FSI) sector is forecast to increase, offsetting each other. The decline in the feed sector is a result of an increase in use of corn in lieu of wheat due to competitive prices. In Israel, it is common for the feed milling industry to shift from corn, barley, and sorghum, to wheat and vice-versa, depending on price. Furthermore, demand shifts during Passover, when Jewish dietary law requires the removal of wheat-based leavened products from baked goods. Wheat is also removed from animal feed for the same reason. Despite this seasonal decline, there has been an increase in home baking—particularly bread and pizza—as families spend more time at home and reduce dining out, partially offsetting the drop in consumption during the holiday period.

Trade:

Post forecasts Israel's MY 2026/27 wheat imports unchanged from the previous marketing year as production is forecast to remain stable, and the feed industry is anticipated to continue utilizing more corn for feed. Around 70-80 percent of wheat is imported from Russia, followed by imports from Ukraine and Romania due to competitive prices, lower freight costs, and faster shipping routes to Israeli ports compared to other suppliers. However, wheat imports from Ukraine have decreased in the past four years as Ukraine has increased its exports to other European countries. Like previous years, the Israeli government has voiced its desire to purchase more non-Black Sea origin wheat, as the government aims to diversify its wheat imports. For example, in September 2025, the Minister of Agriculture and Food Security (MoAFS) signed a memorandum of understanding for increased collaboration between Israel and Moldova to

diversify wheat sources.[1] However, Black Sea origin wheat maintains price competitive compared to alternative suppliers.

In Israel, it is common for domestically produced wheat to be blended with imported grain, and wheat procurement for milling and flour production is almost entirely handled by the private sector. At the same time, government policy influences these private transactions through regulatory and tariff mechanisms aimed at supporting domestic production and food security. There are currently no tariffs for U.S. wheat.

Stocks:

Post forecasts that wheat stocks for MY 2026/27 will decline to 366 TMT, with revised estimates for MY 2025/26 also down due to increased consumption. The MoAFS manages emergency reserves of feedstuffs—including feed grains, oilseed meal, DDGS, and CGF—and requires all domestically produced wheat to be held as part of these emergency stocks.

In line with its approach to other commodities, the Israeli government aims to increase emergency feed wheat stocks for the livestock sector. MoAFS awards tenders to companies best suited to store these reserves, while local importers also maintain some milling wheat stocks. Industry sources indicate that the government seeks to maintain wheat stocks at approximately 400 TMT.

On January 26, 2026, the Knesset's Economic Affairs Committee approved a bill requiring major holders of wheat and animal feed inventories to submit monthly reports to MoAFS to address the lack of transparency for private stock levels. The law, set to take effect four months after publication, aims to better prioritize imports and maintain food supplies during emergencies. [2] This move hopes to improve real-time inventory in response to Israel's heavy dependence on maritime imports, particularly for grains.

[1] https://www.gov.il/en/pages/treatthewheat_moldova

[2] https://en.port2port.co.il/article/Industry-Trade/Governance/Approved-for-Final-Reading-Mandatory-Monthly-Reporting-on-Wheat-and-Feed-Stocks/?utm_source=chatgpt.com

Corn

Corn	2024/2025		2025/2026		2026/2027	
Market Year Begins	Oct 2024		Oct 2025		Oct 2026	
Israel	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	110	110	100	200	0	120
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	1500	1600	1200	1400	0	1450
TY Imports (1000 MT)	1500	1600	1200	1400	0	1450
TY Imp. from U.S. (1000 MT)	871	0	0	0	0	0
Total Supply (1000 MT)	1610	1710	1300	1600	0	1570
MY Exports (1000 MT)	10	10	10	10	0	10
TY Exports (1000 MT)	10	10	10	10	0	10
Feed and Residual (1000 MT)	1400	1400	1100	1400	0	1400
FSI Consumption (1000 MT)	100	100	100	70	0	70
Total Consumption (1000 MT)	1500	1500	1200	1470	0	1470
Ending Stocks (1000 MT)	100	200	90	120	0	90
Total Distribution (1000 MT)	1610	1710	1300	1600	0	1570
Yield (MT/HA)	0	0	0	0	0	0

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Corn begins in October for all countries. TY 2026/2027 = October 2026 - September 2027

OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query

Production:

Post forecasts no corn production in MY 2026/27 (October –September), as Israel is an insignificant producer of corn due to water constraints. Israel only produces sweet corn and popcorn (as they have a higher value compared to feed corn). Due to a lack of corn production, Israel is entirely dependent upon corn imports for its animal feed needs.

Consumption:

Post forecasts total corn consumption during MY 2026/27 at 1.47 MMT, the same as the previous marketing year. Post also revises MY 2025/26 up on account of the strong demand from the poultry and egg industries, which are expected to continue utilizing more corn over wheat for feed due to price competitiveness. FSI corn consumption remains steady, albeit low, as Israeli consumers continue to opt for other types of vegetable oils.

Corn is the primary commodity used for Israel's feed industry, with poultry and egg production supporting most of the demand for the animal sector. Corn plays a vital role in the Israeli feed industry, particularly during Passover, when the feed formula is adjusted to exclude wheat and barley—ingredients prohibited during the holiday. For approximately 25 percent of the year, the industry replaces these grains primarily with corn, as well as rice, soybean meal, sunflower meal, and rapeseed meal.

During the Israel-Hamas conflict, poultry and egg production remained generally operational, with some interruptions. However, during this past marketing year, the poultry and egg industry continued to meet its domestic demand.

Poultry: The poultry sector is a cornerstone of Israeli agriculture and constitutes the country's largest animal production industry. It accounts for 19 percent of total agricultural output, accounting for a substantial element of both food security and employment.[3] Poultry—particularly chicken and turkey—is the most widely consumed meat in Israel, with average consumption reaching 50 kilograms per person, reflecting strong cultural preferences and dietary habits. The sector is largely self-sufficient, with domestic production satisfying most demand.

Eggs: Israel also has a significant domestic egg-laying industry that meets most of the country's egg consumption, producing around 2 billion eggs annually. Consumption of eggs increases as well during the time of Passover, during which the Israeli government may authorize imports to avoid shortages. However, the Israeli government regulates a production quota system to manage domestic demand and reduce oversupply in the market.

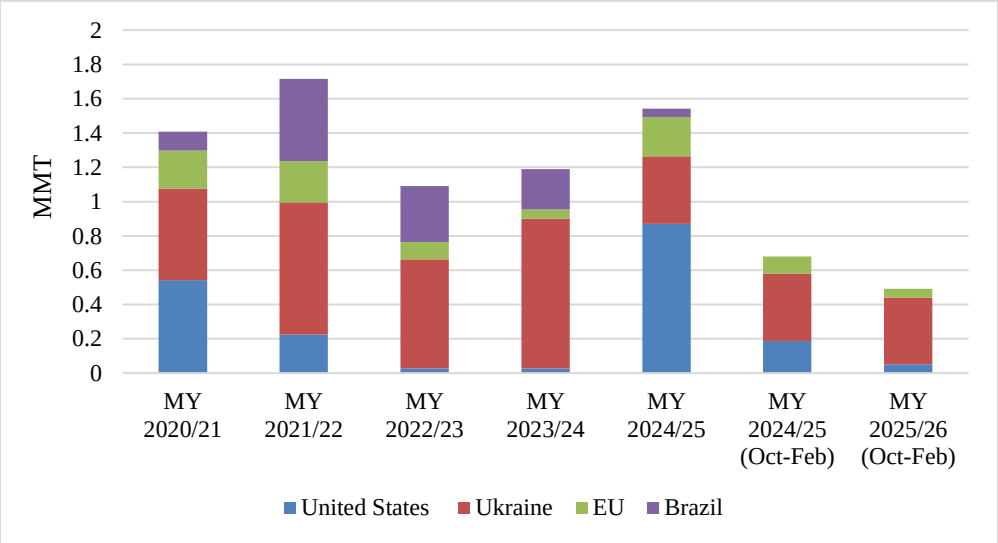
Dairy: Israel's dairy sector plays a central role in domestic food supply. The MoAFS operates a quota system that regulates milk production and farm-gate prices to ensure stable domestic supply.[4] Because Israel has limited land for large-scale grain production, the dairy sector heavily depends on imported feed ingredients, particularly corn. Furthermore, under MoAFS, dairy farms that supply milk to various dairies in Israel are required to provide their livestock (milking cows, dry cows, and replacement heifers) with "kosher-for-Passover feed" ahead of and during the Passover holiday, raising the corn supply needed for dairy cattle.[5]

Trade:

Post forecasts MY 2026/27 corn imports slightly up at 1.45 MMT and raises imports for MY 2025/26 due to price competitiveness for corn over other grains, as well as a normalization of the poultry and egg industry. Israel sources corn from international markets, including the United States, Brazil, Ukraine, the EU. However, during MY 2024/25, U.S. exports of corn to Israel reached a high of 871 TMT (see Figure 2) due to competitive pricing.

[3] https://www.gov.il/en/departments/topics/poultry/govil-landing-page
[4] https://www.israeldairy.com/about-us-copy/?utm
[5] https://www.gov.il/he/pages/moag-dapon-513

Figure 2: Top Countries Exporting Corn to Israel



Source: Trade Data Monitor, LLC.

Israel remains a consistent, importer of U.S. corn co-products, particularly DDGS and CGF. The United States supplies approximately 80 percent of Israel's total DDGS and CGF imports, which are primarily used in the dairy sector and, to a lesser extent, in poultry production. Imports of DDGS and CGF are expected to remain stable in MY 2026/27.

Stocks:

Post forecasts MY 2026/27 down to 90 TMT and revises MY 2025/26 stocks down on account of higher consumption in the feed sector. Israel continues to invest in storage capacity to address food security, particularly for corn and corn co-products such as DDGS and CGF. Israel recently expanded its grain storage capacity via the grain terminal at Haifa port, which is expected to have a storage capacity of 110 TMT.

Barley

Barley	2024/2025		2025/2026		2026/2027	
Market Year Begins	Oct 2024		Oct 2025		Oct 2026	
Israel	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	5	5	5	5	0	5
Beginning Stocks (1000 MT)	35	35	34	39	0	33
Production (1000 MT)	14	14	14	14	0	14
MY Imports (1000 MT)	250	320	250	320	0	290
TY Imports (1000 MT)	250	320	250	320	0	290
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	299	369	298	373	0	337
MY Exports (1000 MT)	0	0	0	0	0	0
TY Exports (1000 MT)	0	0	0	0	0	0
Feed and Residual (1000 MT)	255	320	250	330	0	290
FSI Consumption (1000 MT)	10	10	10	10	0	10
Total Consumption (1000 MT)	265	330	260	340	0	300
Ending Stocks (1000 MT)	34	39	38	33	0	37
Total Distribution (1000 MT)	299	369	298	373	0	337
Yield (MT/HA)	2.8	2.8	2.8	2.8	0	2.8

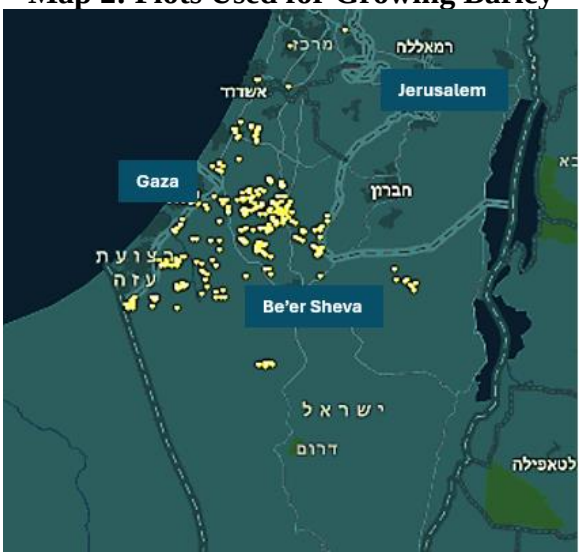
(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Barley begins in October for all countries. TY 2026/2027 = October 2026 - September 2027

OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query

Production:

For MY 2026/27 (October - September), Post estimates Israel planed 5,000 ha of barley, producing 14 TMT, both unchanged from the previous marketing year. As barley is more drought resistant, Israeli farmers prefer to plant barley in lieu of wheat in areas which suffer from low rainfall and where wheat production is limited (see Map 2).

Map 2: Plots Used for Growing Barley



Source: MoAFS GIS Maps

Consumption:

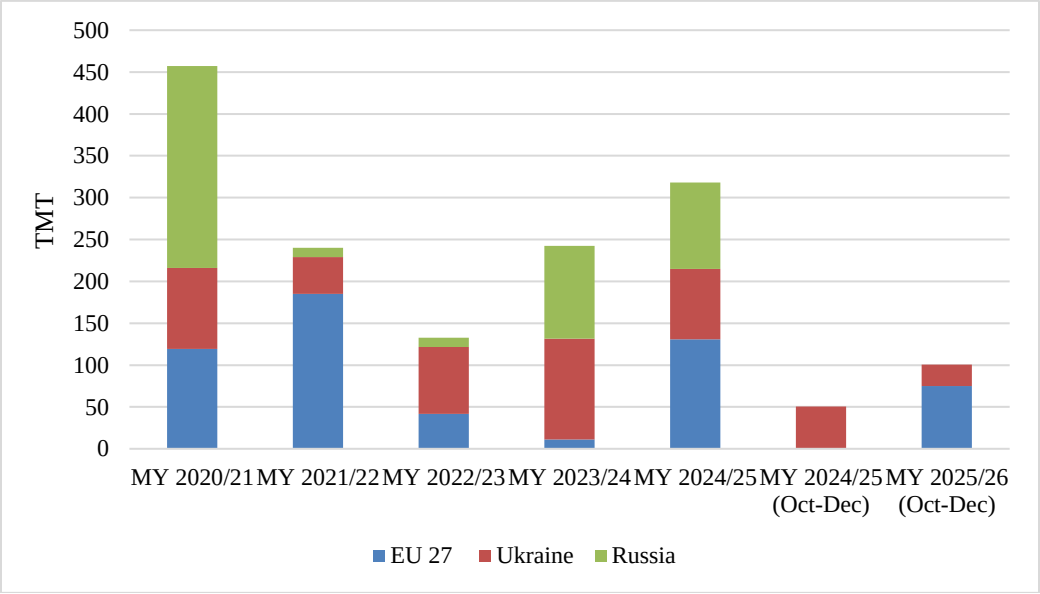
In Israel, barley is used as feed primarily for sheep and goats, and smaller amounts for poultry. Post forecasts Israel's total barley consumption for MY 2026/27 slightly down at 300 TMT due to an anticipated decline in sheep production.

Although barley accounts for a smaller share of feed compared to other grains, Israel will continue to import barley for use in poultry rations. Israeli consumers often associate a yellow tint in chicken meat with poor animal health or obesity. This coloration results from *xanthophyll* pigments in corn that can give broiler meat an orange hue.[6] To moderate this effect, poultry producers and feed millers incorporate barley and other grains into feed rations to reduce the intensity of the yellow coloration in chicken meat.

Trade:

Post forecasts Israel's MY 2026/27 barley imports to decrease slightly to 290 TMT due to lower demand from the sheep and goat industries. For the past few years, there have been no imports of U.S. origin barley, as most of Israel's barley imports come from the EU, Ukraine, and Russia due to shipping proximity and lower prices (see Figure 3). Like other grains, Israel may look for alternative sources in the near term as it looks to diversify import origins.

Figure 3: Top Countries Exporting Barley to Israel



Source: Trade Data Monitor, LLC.; FAS Research

Stocks:

Post forecasts Israel's MY 2026/27 barley stocks to increase slightly to 27 TMT, reflecting a modest decline in consumption. However, Post revises MY 2025/26 ending stocks down to 33 TMT, based on updated information from industry sources, and as Israel prioritizes storage of wheat and corn over other grains.

[6] https://www.pashudhanpraharee.com/factors-influencing-egg-yolk-and-its-pigmentation/

Attachments:

No Attachments