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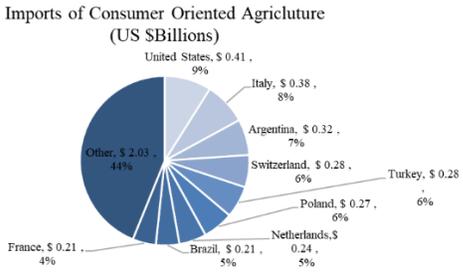
Prepared By: Jessica Shay, Agricultural Marketing Specialist and Elizabeth Mello, Senior Agricultural

Approved By: Jenny Morgan, Acting Agricultural Minister Counselor for Agricultural Affairs

Report Highlights:

Israel is an advanced, market-oriented economy. However, its limited land and water resources preclude agricultural self-sufficiency, which affects local production costs and consumer prices. The country is a net food importer; in 2021, food and agricultural product imports were valued at \$8.79 billion while exports totaled \$2.45 billion. Demand for healthy or natural foods is increasing. Niche products that target a specific health issue like diabetes or celiac disease (gluten-free food) are experiencing growth in demand, as well as vegetarian and vegan products. This report provides an overview of Israeli market dynamics and trends, as well practical tips for doing business in Israel.

Market Fact Sheet: Israel

<p>Executive Summary</p>	<p>Quick Facts CY 2021</p>																																																
<p>Israel is a technologically advanced, market-oriented economy. In 2020, Israel's annual GDP reached \$407.1 billion. According to Israel's Central Bank¹, Israel's GDP grew by 8.6 percent in 2021, and is expected to grow by 6.0 percent in 2022, and by 3 percent in 2023. The inflation rate at the close of 2022 is expected to be 4.6 percent.</p>	<p>Import of Consumer-Oriented Products \$463 million</p> <p>Top Trends Milk alternatives, protein-enriched products, vegan, premium, home cooking and baking, online food shopping, and home delivery.</p>																																																
<p>Consumer-Oriented Agriculture</p>	<p>Trade Overview (\$ billion) 2021</p>																																																
<p>In 2021, Israel's imports of consumer-oriented agriculture agricultural stood at \$4.63 billion. Approximately nine percent of imports were sourced from the United States.</p>  <table border="1"> <caption>Imports of Consumer Oriented Agriculture (US \$Billions)</caption> <thead> <tr> <th>Country</th> <th>Value (\$ Billions)</th> <th>Share (%)</th> </tr> </thead> <tbody> <tr> <td>United States</td> <td>0.41</td> <td>9%</td> </tr> <tr> <td>Italy</td> <td>0.38</td> <td>8%</td> </tr> <tr> <td>Argentina</td> <td>0.32</td> <td>7%</td> </tr> <tr> <td>Switzerland</td> <td>0.28</td> <td>6%</td> </tr> <tr> <td>Turkey</td> <td>0.28</td> <td>6%</td> </tr> <tr> <td>Poland</td> <td>0.27</td> <td>6%</td> </tr> <tr> <td>Netherlands</td> <td>0.24</td> <td>5%</td> </tr> <tr> <td>Brazil</td> <td>0.21</td> <td>5%</td> </tr> <tr> <td>France</td> <td>0.21</td> <td>4%</td> </tr> <tr> <td>Other</td> <td>2.03</td> <td>14%</td> </tr> </tbody> </table>	Country	Value (\$ Billions)	Share (%)	United States	0.41	9%	Italy	0.38	8%	Argentina	0.32	7%	Switzerland	0.28	6%	Turkey	0.28	6%	Poland	0.27	6%	Netherlands	0.24	5%	Brazil	0.21	5%	France	0.21	4%	Other	2.03	14%	<table border="1"> <thead> <tr> <th></th> <th>Total</th> <th>U.S. Share</th> </tr> </thead> <tbody> <tr> <td>Food and Agricultural Products³ Exports</td> <td>\$2.45</td> <td>19%</td> </tr> <tr> <td>Food and Agricultural Products³ Imports</td> <td>\$8.79</td> <td>6%</td> </tr> <tr> <td>Agricultural and Related Products² Imports</td> <td>\$10.03</td> <td>8%</td> </tr> <tr> <td>Consumer-Oriented Agriculture² Imports</td> <td>\$4.63</td> <td>9%</td> </tr> </tbody> </table> <p>Top Host Country Food Retailers Shufersal, Rami Levi and Merav-Mazon Kol/Osher Add.</p> <p>GDP/Population Population (<i>millions</i>): 9.619 (as of October 2022) GDP (<i>billions USD</i>): \$407.1 (2020) GDP per capita⁴ (<i>USD</i>): \$48,400 (as of Q3/2022)</p>		Total	U.S. Share	Food and Agricultural Products ³ Exports	\$2.45	19%	Food and Agricultural Products ³ Imports	\$8.79	6%	Agricultural and Related Products ² Imports	\$10.03	8%	Consumer-Oriented Agriculture ² Imports	\$4.63	9%
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<p>With over 1,800 facilities, the Israeli food processing sector is an important player in the domestic economy. The Israeli food processing industry is innovative, marketing thousands of new products per year. Multi-national food manufacturers partner with well-known Israeli food companies. Four groups dominate the local food processing industry: Tnuva, Osem-Nestlé, Unilever, and Strauss.</p>	<table border="1"> <thead> <tr> <th>Strengths</th> <th>Weaknesses</th> </tr> </thead> <tbody> <tr> <td>Strong demand for consumer products</td> <td>Geographical distance to Israel</td> </tr> <tr> <td>Consumers recognize and appreciate the high quality of U.S. products</td> <td>Cost of shipment from the U.S. is high</td> </tr> <tr> <td></td> <td>Israel importers' order size tends to be smaller than other export destinations</td> </tr> </tbody> </table>	Strengths	Weaknesses	Strong demand for consumer products	Geographical distance to Israel	Consumers recognize and appreciate the high quality of U.S. products	Cost of shipment from the U.S. is high		Israel importers' order size tends to be smaller than other export destinations																																								
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<p>In 2021, Israel imported \$3.54 billion in raw food products for the food processing industry. In 2020, Israeli food processors' annual revenue stood at \$19.26 billion while the beverage and tobacco industry's annual revenue was \$2.42 billion. Main sub-sectors include bakery products, prepared meals, dairy products and the processing and preserving of meat. The sector represents approximately 19.1 percent of the total manufacturing industry's revenue.</p>	<table border="1"> <thead> <tr> <th>Opportunities</th> <th>Threats</th> </tr> </thead> <tbody> <tr> <td>Kosher product availability</td> <td>Israel adopting EU food regulations</td> </tr> <tr> <td>Free trade agreement with Israel</td> <td></td> </tr> </tbody> </table>	Opportunities	Threats	Kosher product availability	Israel adopting EU food regulations	Free trade agreement with Israel																																											
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<p>Israeli fast-moving consumer goods (FMCG) 2021 sales reached \$15.65 billion, in which \$12.8 billion were from food and beverages products. The food retail market is made up of supermarket chains, as well as urban convenience stores and gas stations, neighborhood grocery stores, and wet markets. In 2021, over 65 percent of the sales of the total retail market were from supermarket chains. While the top three leading supermarket retailers accounted for over half of the market. The leading retail supermarkets in Israel are: Shufersal, Rami Levi and Merav-Mazon Kol/Osher Add.</p>	<p><i>Data and Information Sources:</i> Israeli Central Bureau of Statistics (CBS), Storennext, Euromonitor, Trade Data Monitor, Bank of Israel, FAS Tel Aviv office research, UN Comtrade Database, Company Financial Reports, CofaceBdi, Israeli Restaurant and Café Association, Dun's 100</p> <p>¹ Bank of Israel Forecast, October 2022 ² Trade Data Monitor ³ Harmonized Tariff Schedule Chapters 1-24 ⁴Bank of Israel publication, PPP exchange rate</p>																																																

SECTION I – MARKET OVERVIEW

Israel is a parliamentary democracy of over 9.62 million people (Israel Central Bureau of Statistics, October 2021), growing at 1.7 percent annually. Nearly 75 percent of the population is ethnically Jewish, with 25 percent being non-Jewish and mainly of Arab descent. Israel's area is approximately 20,330 square kilometers, making it about the U.S. state of New Jersey. Roughly 40 percent of Israel's population is concentrated in the greater Tel Aviv metropolitan area, Israel's commercial and financial center. Other major population centers include Jerusalem and the Haifa metropolitan area, a major port city and center for the petrochemical and high-tech industries.

Israel's annual per capita GDP in purchasing power parity terms is \$48,400 (Israel's Central Bank Q3/2022). In 2020, Israel's annual GDP reached \$407.1 billion. According to Israel's Central Bank, Israel's GDP grew by 8.6 percent in 2021, and is expected to grow by 6.0 percent in 2022, and by 3 percent in 2023. The inflation rate at the close of 2022 is expected to be 4.6 percent.

Israel is a technologically advanced, market-oriented economy. The country is an industrialized, free-market economy, with a diversified manufacturing sector. Israel's main export market is the European Union (EU). Consumers are sophisticated and enjoy cosmopolitan food tastes. Although there have been street protests recently over food prices and the high cost of living, Israelis remain willing to pay more for high-value products. Currently, over 16 percent of household expenditures are dedicated to food products. Producers, food processors, wholesalers, retailers, food service operators, and food importers are all part of a well-developed agribusiness sector, contributing to a domestic scenario that is competitive and dynamic.

Israel's limited land and water resources preclude a high level of agricultural self-sufficiency; this affects local production costs and consumer prices. The country routinely posts sizeable trade deficits in food and agricultural products, importing large volumes of feed grains and sizable volumes of consumer-oriented products.

For more in-depth information about Israel's economy, see the Bank of Israel's [Research Department Publications](#), the U.S. Department of State's Israel [Investment Climate Statement](#), and the U.S. International Trade Administration's [Israel Country Commercial Guide](#).

Israel and the United States benefit from a free trade agreement (FTA). The [United States-Israel Free Trade Agreement](#) (FTA) entered into force in 1985 and holds the unique distinction of being the United States' first FTA partner. The FTA continues to serve as the foundation for expanding trade and investment between the United States and Israel by reducing barriers and promoting regulatory transparency.

Table 1: Advantages and Challenges Facing U.S. Supplier Strengths

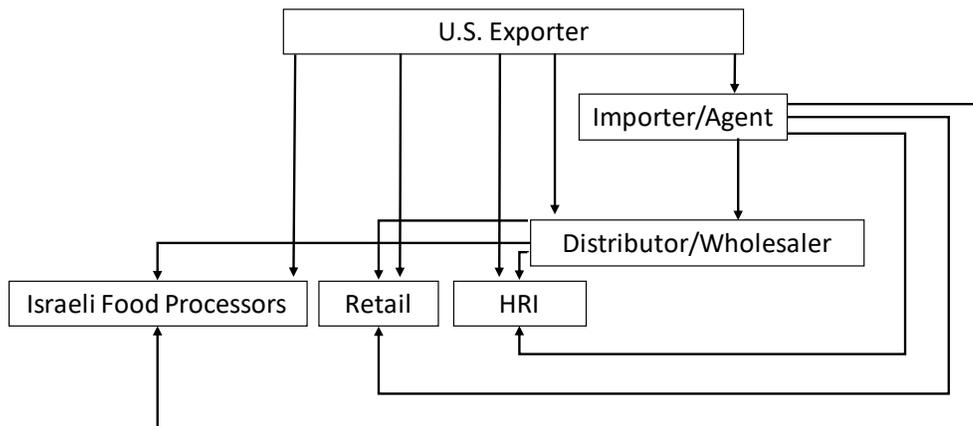
Advantages	Challenges
The U.S.-Israel FTA offers the United States tariff rate quotas for some products, while reducing duties on other products.	Fresh produce lacking a risk assessment cannot enter Israel.
Kosher products have a high market share in Israel; large supermarket chains and hotels buy only kosher products. Over 10,000 American companies produce kosher products; U.S. products have a comparative advantage.	Many U.S. firms are unresponsive to Israeli requests to do business.
Israel is almost completely dependent on imports to meet its grain, oilseeds, and feed needs. The United States is one of the largest worldwide suppliers.	Israel is adopting EU-27 standards, which, in many cases, are more restrictive than international standards.
High living costs are forcing a reconsideration of tariffs and quotas.	The EU-27 is Israel’s main trading partner
After a 13-year ban on U.S. beef, the Israeli veterinary services lifted the ban in February 2016.	Most frozen beef imported by Israel originates from South America and Eastern Europe, both of which have strong price advantages over U.S. beef products.
The Israeli consumer is already familiar with U.S. products and is receptive to new and emerging products from the U.S.	Kosher requirements are strict; consumers are demanding high-level kosher certification for their food products.
Israel’s and Palestine’s economies are linked. Exporters can use Israel as a gateway to the Palestinian market.	Import requirements are strict; new-to-market products are often detained at port.
Israel’s per capita consumption of fresh fruits and vegetables is high.	The hotel, restaurant, and institutional sector generally prefers imports from nearby countries.
Israelis are health-conscious, preferring to eat a balanced diet. Supermarkets are carrying products that were once only available at specialty stores. U.S. products are known for their high quality and wholesomeness.	Many Israeli traders consider the Black Sea region a natural source for grains due to its proximity and the convenience of small- and medium-sized cargoes.

SECTION II – EXPORTER BUSINESS TIPS

Market Research: U.S. exporters should establish business relationships with reliable and efficient Israeli importers and distributors. These will help identify the appropriate distribution and sales channels. Exporters are encouraged to meet with Israeli importers in person to explore business opportunities. Face-to-face meetings tend to build confidence and facilitate communication. FAS Tel Aviv (Post) can facilitate exchanges of U.S. exporters to Israel or of Israeli buyers to U.S. food shows or conventions.

Market Structure: U.S. exporters able to supply reliably in large quantities should approach large Israeli food retail chains. Food retailers like Shufersal and Rami Levi have their own purchasing and importing divisions. Suppliers should 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. Post can provide lists of local importers and facilitate contact information. Exporters should consider customers’ price sensitivity, product requirements, purchasing policies, and volumes.

Chart 1: Israel, Food Import Distribution Channel



General Consumer Tastes and Trends: Israeli consumers tend to demand kosher products and many of the larger supermarket chains only carry kosher foods. Similarly, many hotels, restaurants and industrial buyers only source kosher products. At the same time, as Israeli incomes have increased, consumers have also become more health-conscious thereby further shifting food demand toward products considered wholesome or healthy. Most consumers prefer to buy their products at supermarket chains, instead of open markets and small grocery stores.

Marketing Tips:

- Direct communication is common through WhatsApp, email, phone, and mail.
- The internet is widely used in Israel, and a growing direct marketing avenue.
- For first-time U.S. exporters, it is important to note that distinct cultural differences between Israel and the United States may in some cases dictate changes in selling, advertising, and marketing. Although many strategies used by firms in the United States can be equally effective in Israel, U.S. companies should understand that selling in Israel is not the same as selling in the U.S. market.
- [Israel's tariff classification](#) is based on the Harmonized Tariff System (HS). Israel's Customs and Purchase Tax Tariff is the main instrument used for the classification of goods. The correct classification of goods is the key to determining tax rates, as well as obtaining various authorizations, permits and licenses. It is recommended to contact a professional customs broker prior to exporting.
- Almost all goods are imported through Israel's two Mediterranean ports, Haifa in the north and Ashdod in the south. Ben Gurion International Airport is also an important port of entry. These ports have good transportation links to the rest of the country. While most companies are headquartered in the Tel Aviv or Haifa metropolitan areas, a growing number of firms maintain branches, showrooms, or service facilities in Jerusalem and Be'er Sheva.
- Israel has an extensive road network that connects the entire country, as well as advanced inland and international transport facilities. Rental cars, taxis, and limousines with drivers are readily available for visitors.
- A visa is not required for U.S. citizens traveling for tourism or short-term business projects.
- U.S. travelers should refer to the Department of State's [International Travel Information](#) for the most up-to-date information on Travel Warnings and Visa Requirements for Israel.

Local Business Practices and Customs

Hebrew and Arabic are the two official languages of Israel. English is the third and principal foreign language, although the use of Russian is also prevalent. Many signs in public places are in all three languages and most Israelis are multilingual. Business hours are Sunday through Thursday from 8:00 a.m. to 5:00 p.m. for most businesses and government offices. Occasionally, businesspeople will be willing to hold meetings on Friday mornings. Most business and restaurants close on the Jewish Sabbath, which is Friday sundown until Saturday sundown.

Jewish Holidays in Israel are mainly in September, October, and April. Exporters should take note of Israeli holidays, as their Israeli counterparts are closed on those dates. Additionally, there is no public transportation on the Jewish Sabbath and on some Jewish holidays.

Recommendations for U.S. Food and Agricultural Product Exporters

Exporters that adhere to the following recommendations stand a better chance of success in accessing the Israeli agricultural and food market:

- A U.S. Certificate of Free Sale, obtained from the U.S. Food and Drug Administration (FDA), facilitates the Israeli Ministry of Health's import licensing procedures.
- Given that Israel is adopting EU-27 standards, U.S. exporters already familiar with EU-27 import requirements will have better success in gaining entry to the Israeli market.
- Products certified as being manufactured under Good Manufacturing Practices (GMP) or Hazard Analysis and Critical Control Points (HACCP) will have greater ease of access to the Israeli market.
- Being included on the FDA's list of registered facilities is viewed favorably by Israel's import licensing authority. It provides confirmation that the exporting manufacturer's facility has been inspected by the FDA and or U.S. Department of Agriculture.
- Products must have a minimum shelf life of six months upon arrival at port.

SECTION III – IMPORT FOOD STANDARDS AND REGULATIONS AND IMPORT PROCEDURES

Israel Import Documentation and Requirements and Food Standards and Regulations

For detailed information regarding standards and regulations for importing food and agricultural products into Israel, see [GAIN-Israel – \(IS2022-0006\) Food and Agricultural Import Regulations and Standards – FAIRS Israel 2022 report](#).

Customs Procedures - Valuation and the Value Added Tax

Customs Valuation and Tax: Israel has implemented the World Trade Organization (WTO) Customs Valuation Agreement. Under the WTO regulations, the basis for valuation is the transaction value. In most cases the cost, insurance, and freight (CIF) price are included. Israel's tariff classification is based on the Harmonized Tariff System. Israel's Customs and Purchase Tax Tariff is the main instrument used for classifying imports. The correct classification of goods is the key to determining correct duty rates. It is utilized for obtaining authorizations, permits, licenses, and meeting all other conditions for the import of goods.

Value Added Tax: The value added tax (VAT) is 17 percent. The tax is imposed on all products and services, excluding fresh fruit and vegetables.

Tariffs and Free Trade Agreements: Israel is a member of the World Trade Organization (WTO) and party to free trade agreements (FTA). The United States-Israel Free Trade Agreement is the United States' first trade

agreement (1985). Following the 1985 U.S.-Israel FTA, a bilateral Agreement on Trade in Agricultural Products (ATAP) was signed in 1996. Since then, annual extensions have been issued to allow the parties to negotiate a permanent agreement.

Under the current FTA-ATAP regime, virtually any product produced in Israel that can be competitive in the U.S. market can enter the United States duty-free. In contrast, U.S. products continue to face high tariffs in many sectors limiting their access to the Israeli market. The current ATAP regime provides U.S. food and agricultural products access to the Israeli market under one of three different categories: 1) unlimited duty-free access; 2) duty-free tariff rate quotas (TRQ); or 3) preferential tariffs set at least 10 percent below Israel’s Most Favored Nation (MFN) rates. The U.S. government and industry continue to seek more favorable permanent agreement in agricultural products.

Israel’s tariff profile for some agricultural products (i.e., dairy, meat, eggs, and some fruit and vegetables) continues to remain prohibitively high on many product lines. Indicative of the uneven nature of Israel’s tariff profile are the low tariffs, even sometimes duty-free status, for specific products not produced in Israel. This is true for certain coarse grains and oilseeds. For further information see Israel’s Customs and Purchase Tax Tariff [website](#).

SECTION IV: MARKET SECTOR STRUCTURE AND TRENDS

Table 2: Key Developments for Top Sectors:

Product	Trend
Protein enriched products	2020 to 2021: 20.7 percent growth in sales
Premium products (quality foods such as high-end chocolate, desserts and cheeses)	2020 to 2021: 2.4 percent decline in sales
Milk alternatives	2020 to 2021: 14.4 percent growth in sales Milk alternatives include soy, oat, rice and almond
Meat alternatives	Israeli hamburger restaurants are selling U.S. meatless hamburgers. Increase in the number of products available at food retailers. Meat alternatives include soy hamburgers, mushroom lentil and quinoa hamburgers, seitan, and tofu.
Frozen readymade / fast preparation food meat/fish	2020 to 20221: 4.5 percent decline in sales
Private label (PL)	Decline in growth in the PL market share of Fast-Moving Consumer Goods (FMCG), 6.6 percent in 2021 compared to 6.9 percent in 2020

Source: StoreNext, Israeli Press, and FAS Tel Aviv office research.

Table 3: Best Consumer-Oriented Product Prospects:

Currently in the Israeli with good sales potential	Not currently in the Israeli market in significant quantities, but with good sales potential
Nuts	Chilled kosher beef
Processed fruit	Processed beef
Dairy products	Frozen cherries and berries
Alcohol	Premium dessert products such as premium chocolate bars, cookies, ice cream, and cheese
Grape juice	Frozen kosher appetizers
Pears and apples	Vegan and vegetarian products
Sauces	Gluten free products
	Maple syrup

Key Competitors Situation

In 2021, Israel's imports of agricultural and related products¹ stood at \$10.03 billion. The United States is the largest supplier, followed by China, holding a market share of 8 percent and 5 percent, respectively.

Consumer-oriented agriculture accounted for over 45 percent of the imports. The United States is the largest consumer-oriented agriculture supplier, approximately nine percent of imports were sourced from the United States while the second largest supplier is Italy, accounting for eight percent of the imports.

Table 4: Israel's Imports of Agricultural and Related Products from the World (U.S. dollars billions)

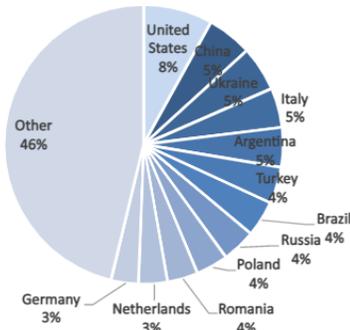
	2017	2018	2019	2020	2021
Agricultural Related Products	\$1.26	\$1.34	\$1.28	\$1.26	\$1.72
Bulk	\$1.24	\$1.34	\$1.32	\$1.34	\$1.56
Consumer Oriented	\$3.14	\$3.35	\$3.60	\$3.84	\$4.63
Intermediate	\$1.24	\$1.32	\$1.34	\$1.50	\$2.12
Total	\$6.88	\$7.36	\$7.53	\$7.94	\$10.03

Source: Trade Data Monitor, LLC.

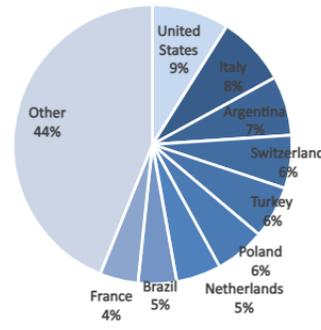
¹ BICO- Agricultural and Related Products

Chart 2: Key Competitors (Market Share, Percent)

Imports of Agricultural and Related Products, %



Imports of Consumer Oriented Agriculture, %



Source: Trade Data Monitor, LLC.

Best High-Value, Consumer-Oriented Product Prospect Categories: The trend in the Israeli food market is healthy foods, demanding products that have reduced fat, reduced salt, and reduced sugar component. However, despite the growing health-conscious trend among consumers, there is growing demand for quality-foods such as high-end chocolate, desserts, and cheeses. Israeli food manufacturers, importers, retailers, and restaurants are adjusting their product lines and menus to meet the demand of a growing number of vegans, vegetarians, and gluten-sensitive consumers.

Supermarket chains are touting private labels that guarantee product quality at lower retail prices than branded products, as a growth engine. Today, there is also an upswing in online shopping, as retailers improve their product quality offerings alongside more user-friendly websites.

When eating out, Israelis demanded high-quality beef and seafood products which open possibilities for greater amounts of U.S. kosher products.

SECTION V – AGRICULTURAL AND FOOD IMPORTS

Israel is a net food importer. In 2021, Israel’s agricultural imports (HS 01-24) stood at \$8.79 billion and exports at \$2.25 billion. Approximately six percent of the imports were from the United States.

Israel is a good export market destination for U.S. food and agricultural products, particularly for dried fruits, nuts, fresh apples and pears, cheese, and other food products. Niche products that target a specific health issue like diabetes or celiac disease (gluten-free food) are experiencing growth in demand, as well as vegetarian and vegan products. Demand for high-end food products is also growing.

SECTION VI – KEY CONTACTS AND FURTHER INFORMATION

Links to Government Sources

- Israel Tax Authority - [Customs Tariff Book](#)
- Israel Central Bureau of Statistics (CBS) - [Exports and Imports](#)
- [The Standard Institution of Israel \(SII\)](#)
- Ministry of Economy and Industry- [Foreign Trade Administration](#) (FTA)
- [Ministry of Agriculture](#)
- Ministry of Health- [Food Control Administration](#)

Foreign Agriculture Service – Tel Aviv

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<http://www.fas.usda.gov>

For questions or comments regarding this report, or assistance exporting to Israel, please 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.

FAS Tel Aviv Market Reports:

- [GAIN ISRAEL – Israel Retail Foods 2022 Annual](#)
- [GAIN ISRAEL – Israel Food Service – Hotel, Restaurant & Institutional 2022 Annual](#)
- [GAIN ISRAEL – Israel Food Processing Ingredients 2022 Annual](#)

Attachments: [Israel, Consumer Food & Edible Fishery Product Imports \(U.S. dollars million\) .docx](#)