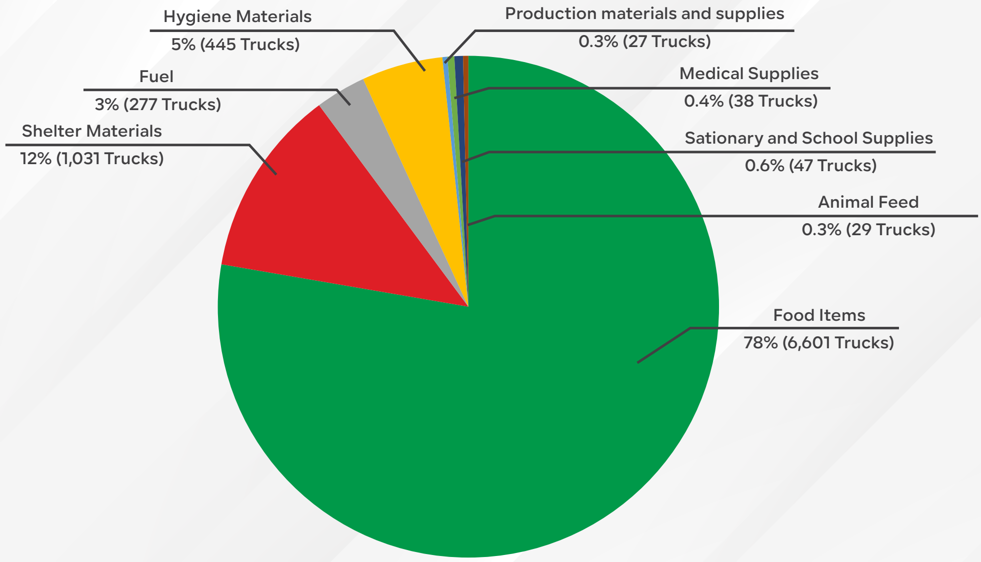
Commercial Goods Flows into the Gaza Strip

Gradual Diversification of Imports amid Continued Consumption Dominance

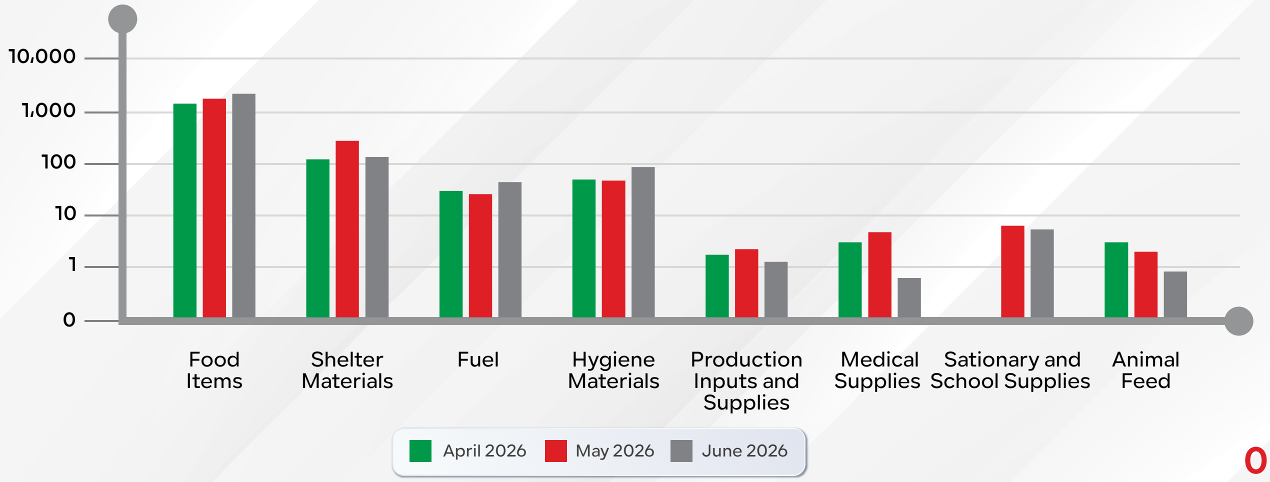
Second Quarterly Report (April – June 2026)

The second quarter of 2026 witnessed relative stability in the overall flow of commercial goods into the Gaza Strip compared with the first quarter. However, this quantitative stability was accompanied by noticeable changes in the composition of imports. Several sectors—particularly shelter materials, hygiene products, and stationery—recorded significant growth, while food commodities continued to account for the largest share of commercial imports, with a growing contribution from non-essential food items. Despite this gradual diversification, commercial imports remained overwhelmingly consumption-oriented, while the inflow of raw materials, production inputs, and operational energy sources continued to be extremely limited, constraining private sector recovery and delaying broader economic revitalization.

Flow of Commercial Goods into the Gaza Strip (Apri – June 2026)

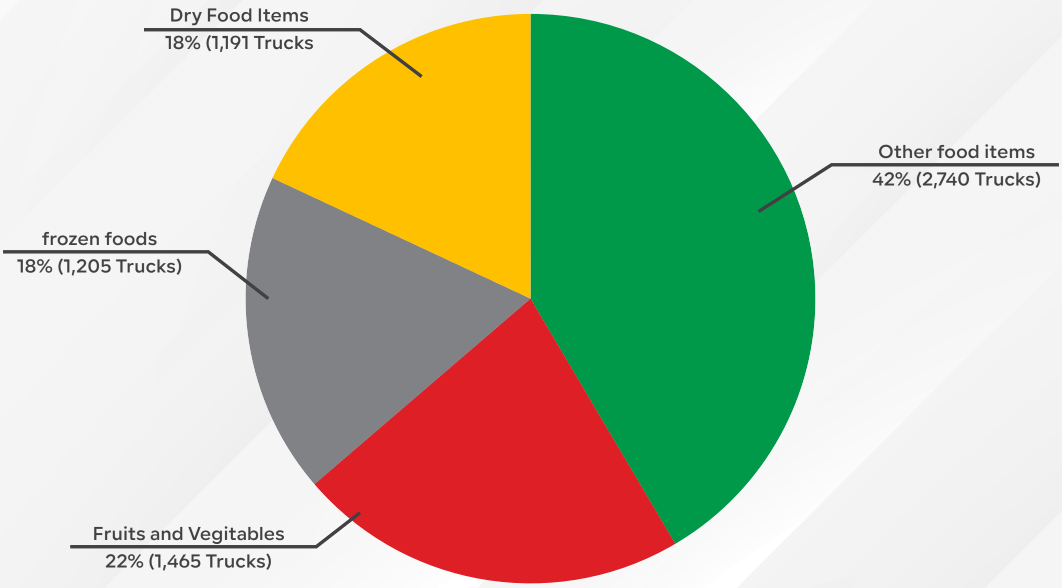


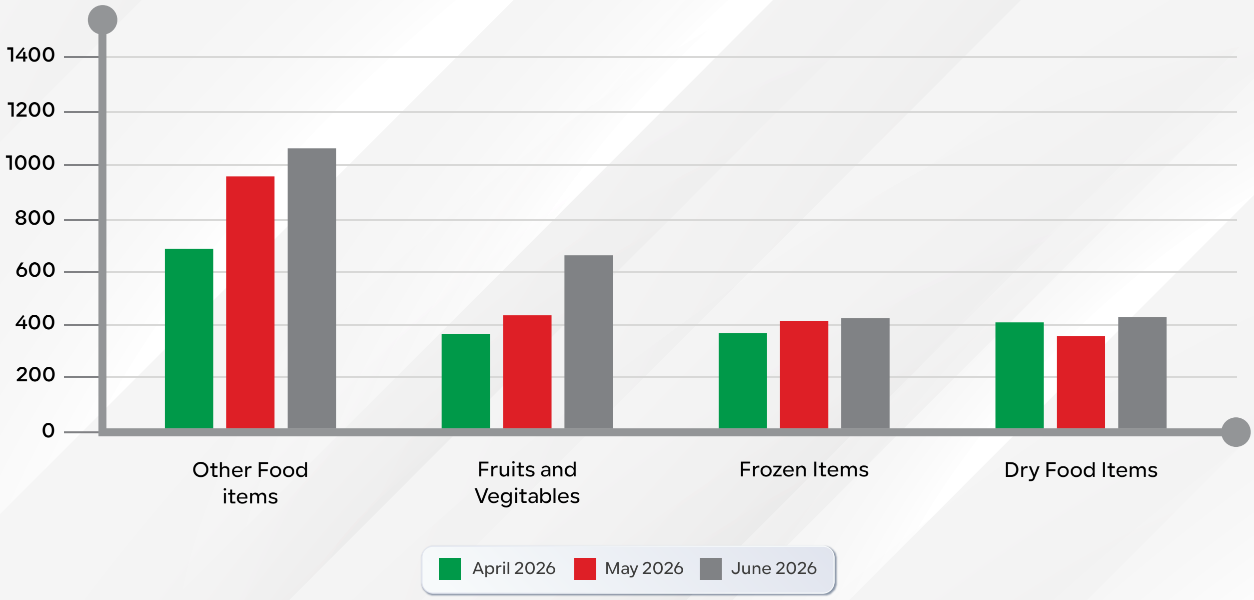
A total of 8,495 commercial trucks entered the Gaza Strip during the second quarter of 2026, compared with 8,435 trucks in the first quarter, representing a marginal increase of 0.7%. This indicates overall stability in commercial inflows, with June recording the highest monthly volume, reflecting a gradual improvement in import flows throughout the quarter. Food commodities remained the dominant import category, accounting for 6,601 trucks (77.7%) of total commercial imports, followed by shelter materials (10.4%), hygiene products (5.2%), fuel (3.3%), and production inputs (2.1%), while medical supplies (0.4%) and stationery and school supplies (0.6%) remained minimal. Compared with the first quarter, the import structure became slightly more diversified, with the share of food commodities declining modestly and shelter and hygiene materials increasing. However, commercial imports continue to be dominated by finished consumer goods, while productive inputs and energy supplies remain critically limited, reinforcing Gaza's consumption-driven economy and constraining the recovery of productive sectors.



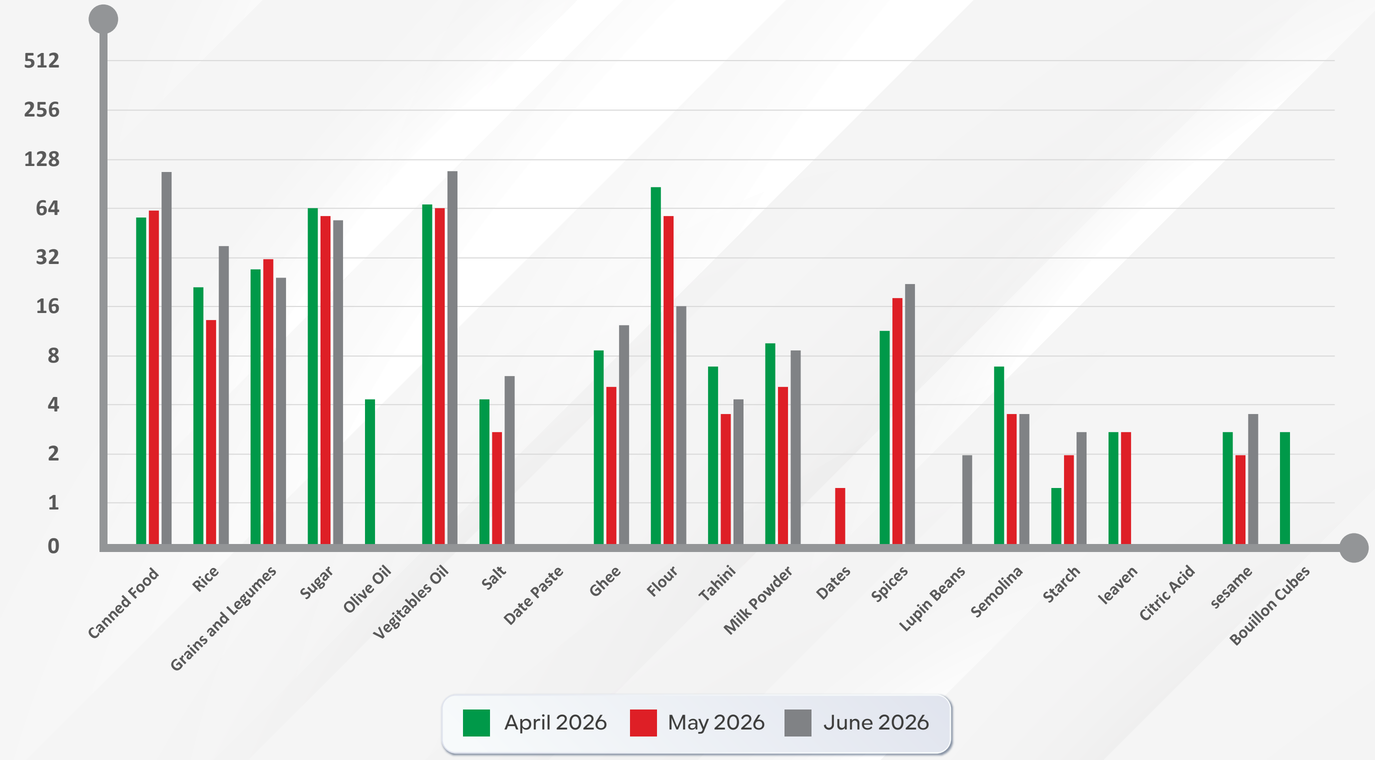
Food commodities remained the largest category of commercial imports into the Gaza Strip during the second quarter of 2026, totaling 6,601 trucks (77.7%) of all commercial imports. Although their share declined from over 86% in the first quarter, they continued to dominate the import structure, reflecting only limited diversification. Non-essential food items accounted for the largest share of food imports (41.5%), followed by fresh fruits and vegetables (22.2%), protein-rich food products (18.3%), and essential dry food commodities (18.0%), while animal feed remained negligible at just 0.4%. Compared with the first quarter, imports shifted further toward non-essential consumer goods—including biscuits, chocolate, snacks, soft drinks, juices, and instant noodles—while imports of key staples, particularly wheat flour, remained relatively low. Although imports of fresh produce and eggs increased, the overall import structure continues to be dominated by consumer goods rather than productive inputs. The persistently low levels of animal feed and agricultural production inputs continue to constrain the recovery of local agriculture and livestock production, leaving Gaza's markets highly dependent on imported consumer goods.

Food Items

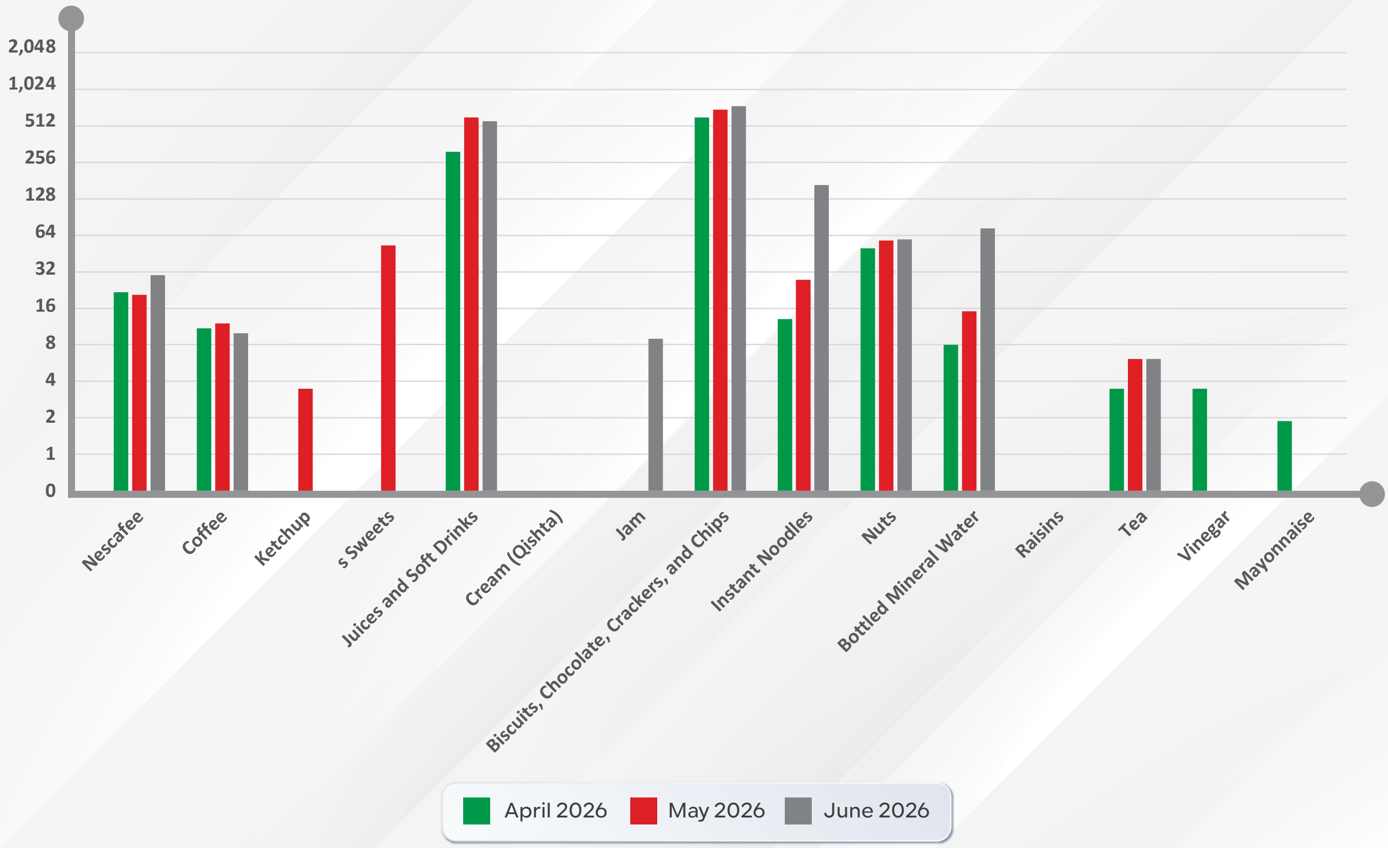




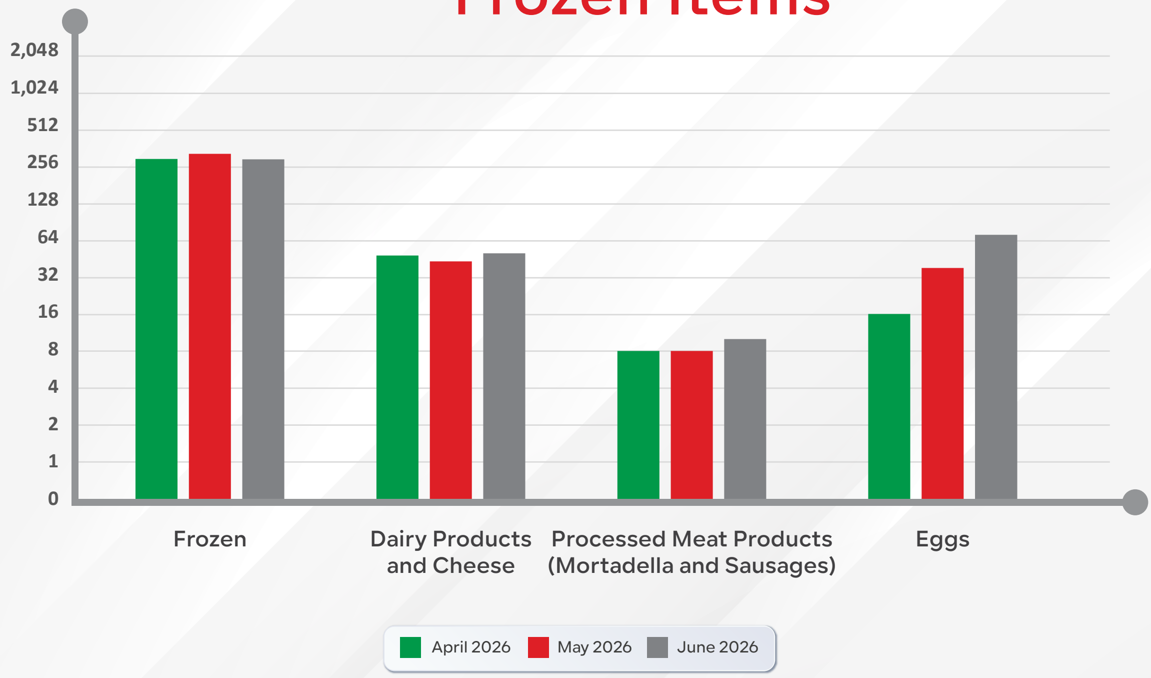
Dry Food Items



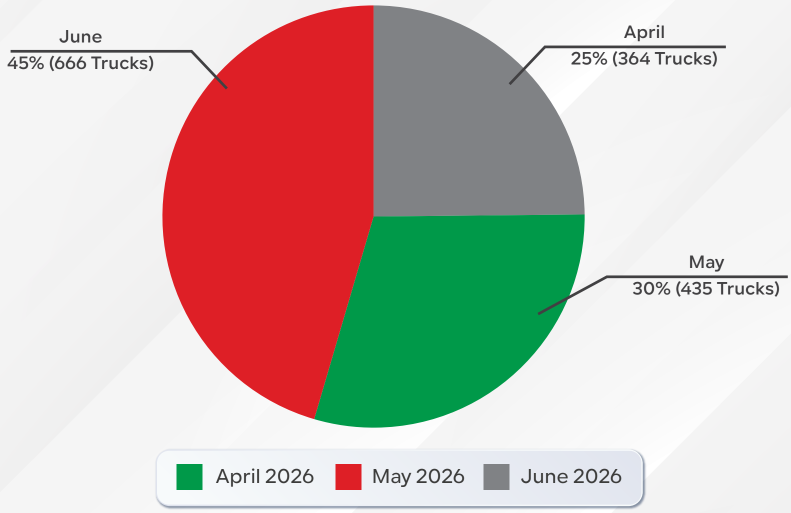
Other Food items



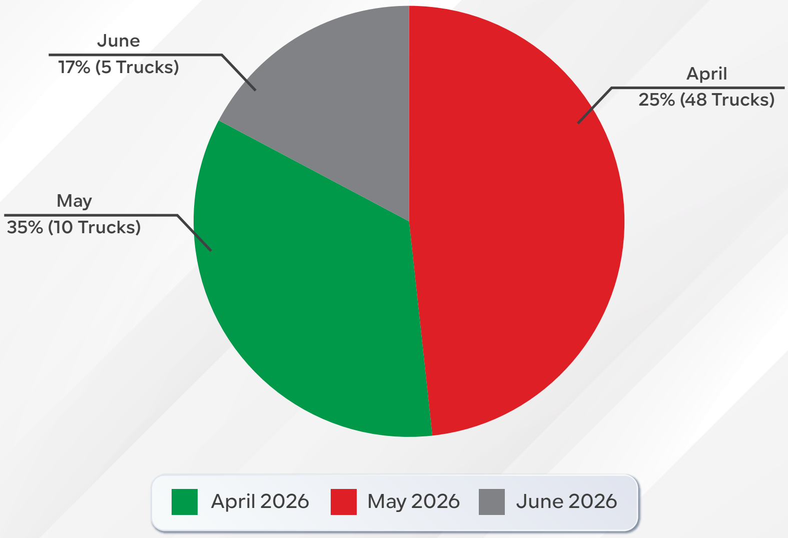
Frozen Items



Fruits and Vegitables

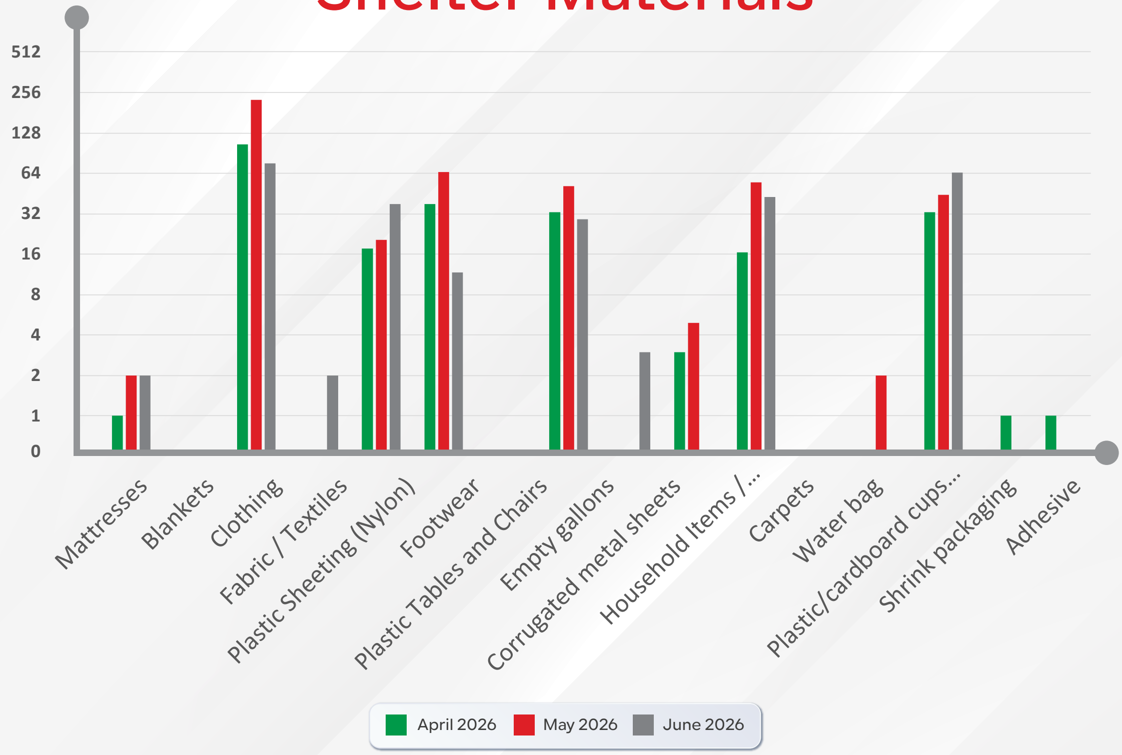


Animal Feed



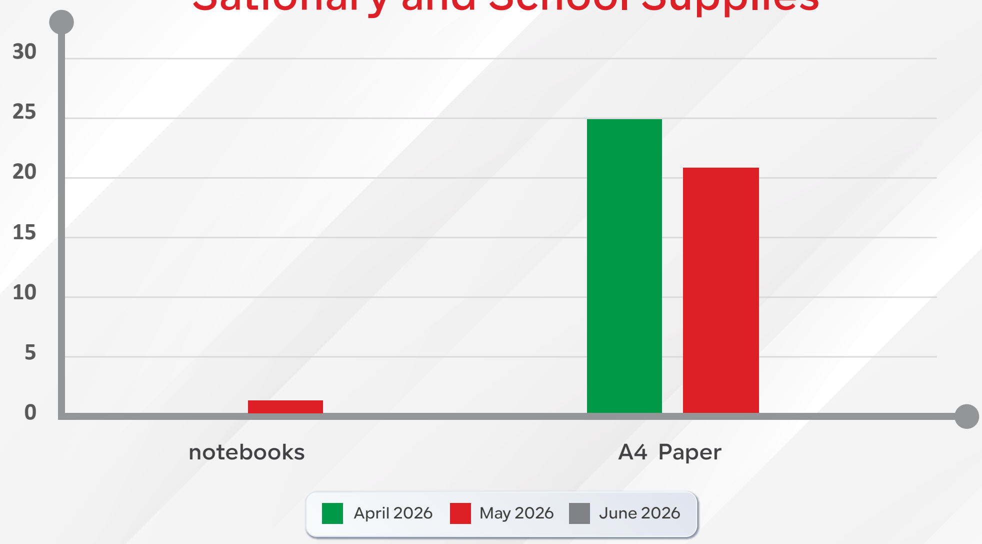
Shelter material imports reached 882 trucks during the second quarter, representing an increase of approximately 31% compared with the first quarter (674 trucks). Clothing accounted for 48% of all shelter-related trucks, followed by household items (13%), footwear (13%), plastic tables and chairs (13%), and plastic sheeting (9%). In contrast, materials associated with more durable shelter solutions—such as mattresses, blankets, textiles, and corrugated metal sheets—remained extremely limited, indicating that imports continue to prioritize immediate household needs rather than longer-term shelter rehabilitation.

Shelter Materials



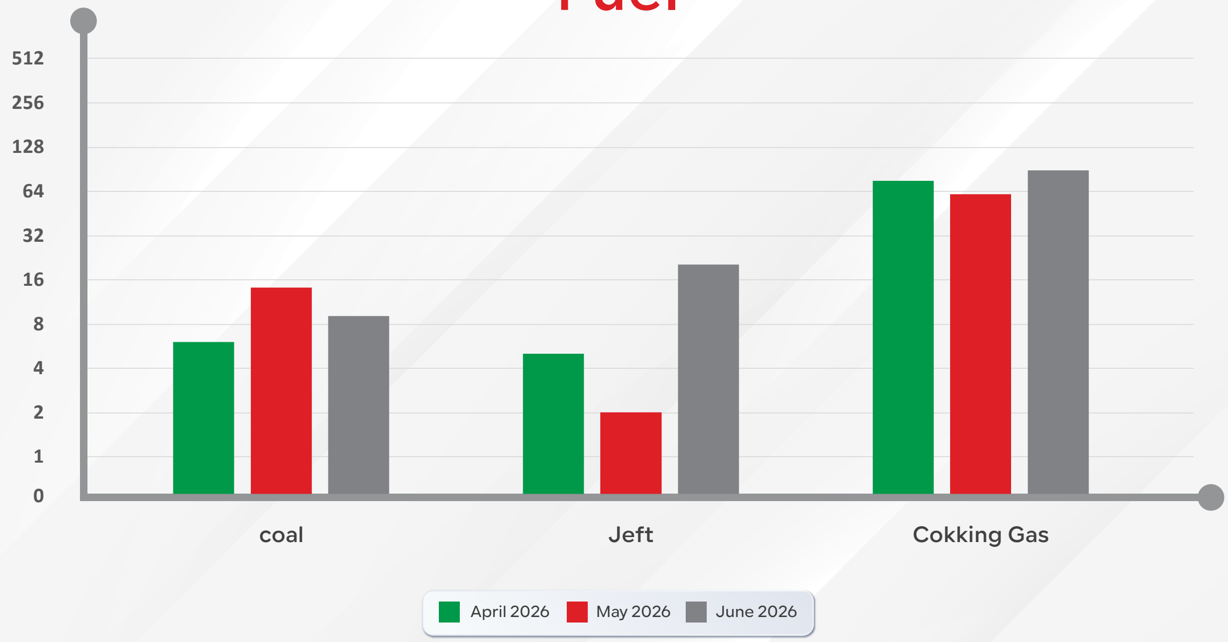
Stationery and educational supplies recorded a noticeable improvement compared with the first quarter, increasing from 16 trucks to 47 trucks, although they still represented less than 1% of total commercial imports. A4 copy paper accounted for approximately 98% of all educational supplies, while school notebooks remained almost absent, indicating that educational inputs continue to be highly constrained despite the modest recovery in import volumes.

Sationary and School Supplies



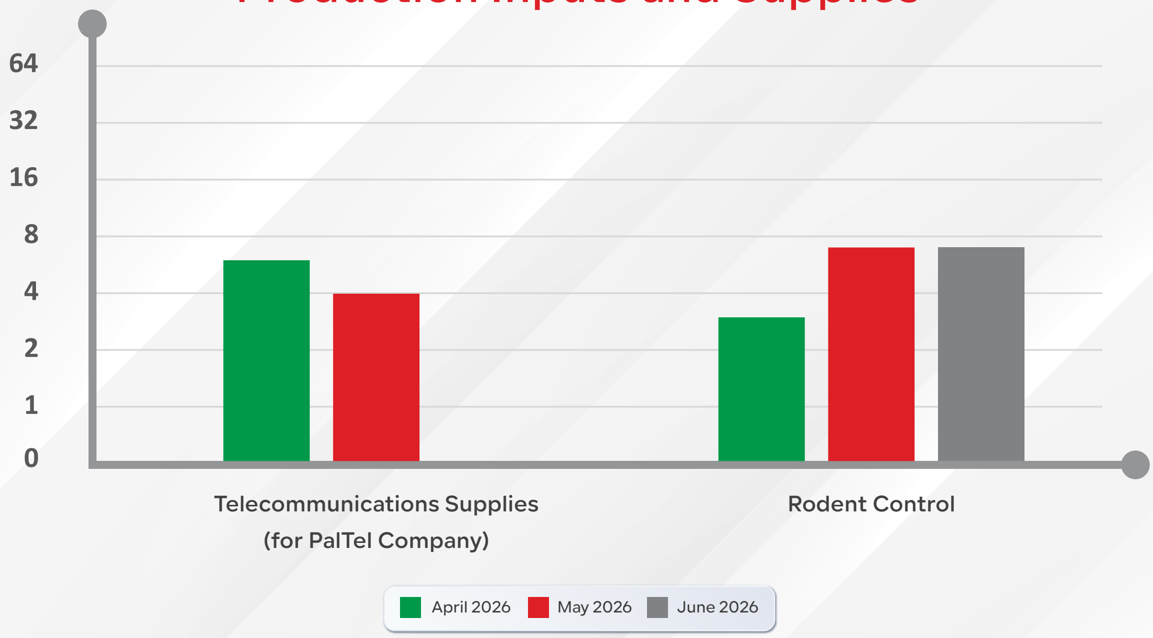
Commercial fuel imports increased to 277 trucks during the second quarter, compared with 215 trucks during the first quarter, representing an increase of approximately 29%. Cooking gas continued to dominate fuel imports, accounting for 80% of all fuel trucks, followed by coal (10%) and olive residue fuel (jift) (10%). Meanwhile, commercial diesel and gasoline remained entirely absent, reflecting the continued restrictions on operational energy supplies required for productive and service sectors, thereby limiting economic recovery.

Fuel



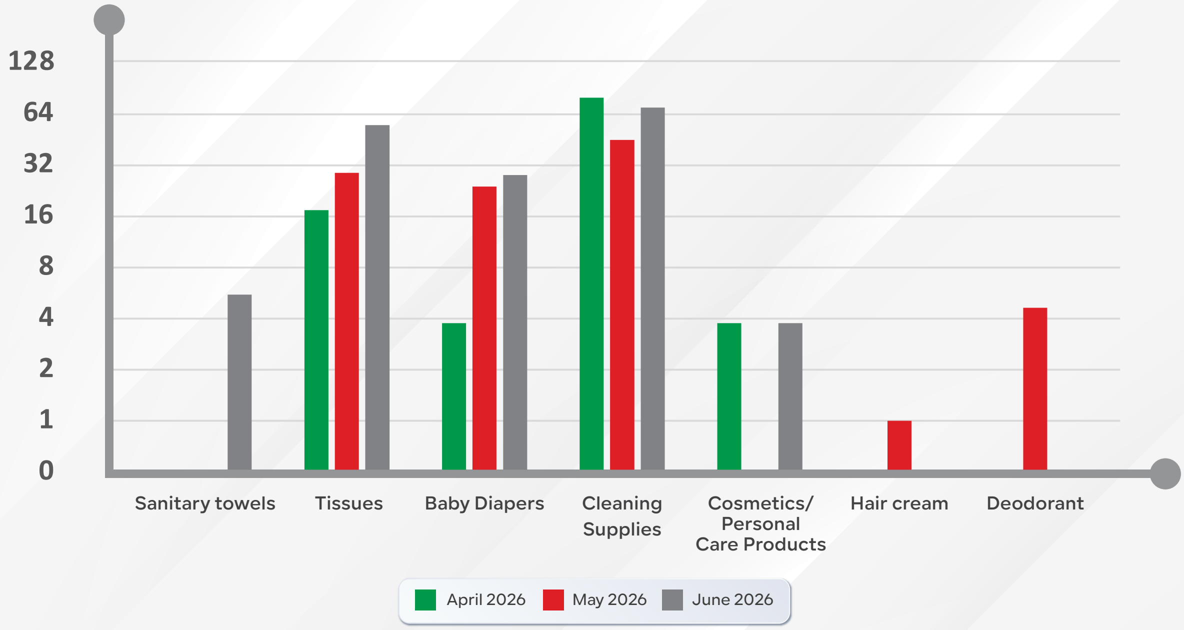
Production inputs increased to 176 trucks during the second quarter, compared with 105 trucks in the first quarter, representing an increase of approximately 68%. Despite this improvement, plastic and cardboard packaging materials accounted for 84% of all production inputs, while the remaining imports were limited to rodent control pesticides, telecommunications supplies, and packaging materials. The continued absence of industrial raw materials, construction materials, machinery, spare parts, and productive equipment demonstrates that Gaza's productive base remains severely constrained and that commercial activity continues to be overwhelmingly consumption-oriented rather than recovery-driven.

Production Inputs and Supplies



Hygiene-related imports increased substantially to 445 trucks during the second quarter, compared with only 24 trucks in the first quarter, reflecting a significant improvement in market availability. Cleaning products represented 54% of all hygiene imports, followed by tissue products (27%) and baby diapers (15%), while personal care products and sanitary towels remained limited. Although this represents an important improvement in public health-related commodities, supply levels remain below the scale of humanitarian needs.

Hygiene Materials



Commercial medical imports declined during the second quarter, falling to 38 trucks compared with 47 trucks during the first quarter, representing a decrease of approximately 19%. Medicines accounted for 71% of all medical imports, while medical supplies represented the remaining 29%. This limited level of commercial medical imports highlights the persistent gap between healthcare needs and available supplies, particularly given the continued pressure on Gaza's health system and its heavy dependence on humanitarian assistance.

Medical Supplies