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Israel 2025: A Demographic Fork in the Road

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Israel 2025: A Demographic Fork in the Road

Alex Weinreb

Introduction

Since Israel's founding, its population growth rate has fallen below 1.5% only twice: to 1.42% in 1981 and 1.35% in 1983. Israel's growth rate in 2025 will shatter that record. According to our estimates, it will be around 0.9%.

The main goal of this year's demography chapter is to shed light on that record-breaking low growth rate. Across three sections, we cover trends in the three components that drive all population change: births, deaths, and migration. Broadly, we show that the number of *deaths* has been slowly rising, but will rise at a much faster rate over the next decade, despite Israel's impressively high life expectancy. We then show that the number of *births* in Israel has been remarkably stable, even as a closer look reveals distinct shifts across Israel's diverse subpopulations that have implications for future growth: these include early signs of a substantial reduction in Jewish women's fertility rates, following those of Muslim women. Combining these two trends allows us to estimate Israel's *rate of natural increase* — demographic growth that is unrelated to net migration — which has been falling over the last few years and will, as we show, fall more dramatically over the next couple of decades.

The final section — also the longest — is on *migration*, which has been shifting markedly over the last few years in terms of the number of people moving both to and from Israel. This shift is the main factor underlying Israel's falling demographic growth rates. Unfortunately, some of the measures used to describe these movements are often misunderstood and, therefore, misused.

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We clarify these issues here, point to the centrality of *remigration* in Israeli migration patterns and to the recent diversification in Israeli emigrants' destinations. We also introduce a statistical model to forecast Israelis' net long-term migration in the short-term that suggests continued high outmigration until at least June 2026.

Mortality

The standard measure used to summarize mortality in a population is *life expectancy at birth*. Estimated in a life table, it is a measure of how long an average person born today would live if they were subject to current age-specific mortality rates.

According to OECD estimates — based on data submitted by member countries' national statistical offices — Israel's overall life expectancy at birth in 2023 was 83.7. Among OECD countries, only Switzerland, Japan, and Spain did better. In fact, Israel's life expectancy was 5.3 and 2.7 years higher than that of the US and UK, respectively. Israel's male life expectancy of 81.7 was joint second highest with Luxembourg and Sweden: only Switzerland is higher. Israel's female life expectancy of 85.7 placed Israel alongside France in 5th place.

It is important to note that these OECD estimates are the CBS's *provisional estimates*, which, in Israel's case, do not include deaths on October 7, 2023, or other war-related deaths that occurred by the end of 2023. This arguably makes them a valid indicator of Israel's intrinsic life expectancy — that is, of the health status of its population and effectiveness of its health system in the absence of war. However, if one's interest is in the actual mortality experience of Israel's population in 2023, those OECD figures are misleading. The war significantly impacted Israelis' actual mortality in 2023, especially that of Jewish men.

This can be seen in Figure 1, which shows these trends for Jews (including Others[1]) and Arabs, with separate lines for men and women. In both sets of graphs, we see what should have been a sharp rise in life expectancy in 2023 for both men and women. After a reduction and flattening of life expectancy

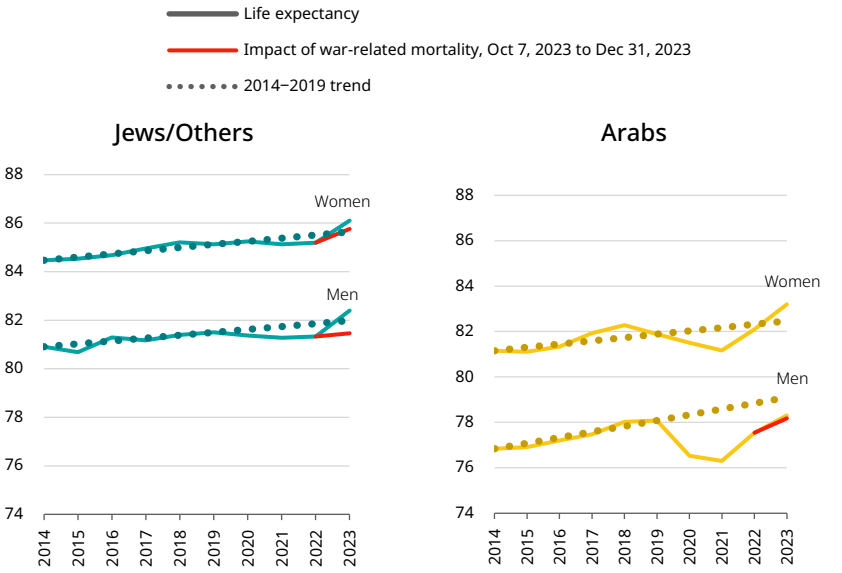
1 "Others" is a Ministry of Interior category used to identify people who are neither *halachically* Jewish under the State's Orthodox interpretation of Jewish law nor Arab. Most Others are people who made *aliya* under the Law of Return and are therefore socially and politically integrated into the Jewish rather than the Arab population. Throughout this chapter, "Jews" includes "Others" unless otherwise stated.

among Jewish men and women during the COVID years (2020–2022) both were on track to surpass the predicted life expectancy, with the latter based on 2014–2019 trends. Arab women's life expectancy also surpassed the long-term trend. Only Arab men fell short of it. This is most likely because the post-COVID rise in life expectancy has been reduced by the high murder rate of Arab men, most of whom are under 40. Because the method used to calculate life-expectancy gives more weight to deaths at younger ages, a person who dies in their first decades of life reduces life expectancy much more than a person who dies at older ages.

This is also the reason for the very large effect of October 7 on Jewish life expectancy, especially of men. Deaths in the October 7 attack and in the subsequent war up to the end of 2023 reduced Jewish men's life expectancy from 82.4 — equal to Switzerland, which topped the OECD ranking — to 81.5. The effects on other groups were less pronounced. The life expectancy of Jewish women fell from 86.1 to 85.8 and of Arab men from 78.3 to 78.2. The war did not directly affect the life expectancy of Arab women.

Even as life expectancy has been climbing, and is expected to climb further, albeit not at the same pace as in the late 20th century (Sasson, 2025), the absolute number of deaths has been rising: from around 46,000 in 2018 to around 51,000 in 2024. This trend has also been affected by COVID and the war in Gaza.

Figure 1. Life expectancy at birth, by population and sex



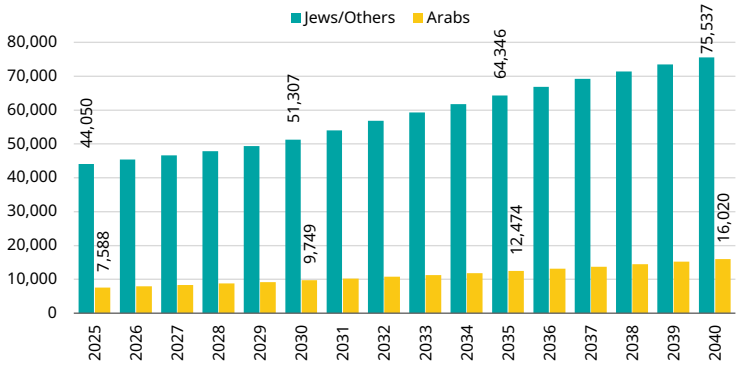
Source: Alex Weinreb, Taub Center | Data: CBS

The number of deaths will continue to rise and, by the late 2020s, accelerate. We know this because we recently projected the number of deaths over the next few decades as part of an effort to better prepare national burial policy (Weinreb, forthcoming). To do this, we projected age-specific mortality rates over the next 15 years based on shifts in the 2009–2019 (pre-COVID) period.[2]

2 The CBS medium variant population projections to 2050 served as the base for our forecast. Those differentiate Jews/Others from Arabs, further dividing each population group by sex. We applied a Holt-Winters projection of age- and sex-specific mortality rates in 5-year age groups up to 2028 to each of these subpopulations, based on prior 2009–2019 age-specific mortality schedules (i.e., we avoided extrapolating from COVID years). Within each subpopulation, we then applied these projected age-specific mortality rates to the CBS population projections in each age group, yielding numbers of deaths in each age group. Adding the age groups together within each subpopulation generates the total number of deaths in each subpopulation.

A subset of those projections is shown in Figure 2. Between 2025 and 2040, the annual number of deaths in Israel will climb by roughly 77%: by 71% in the Jewish/Other population; and by 111% in the Arab population. This sharp increase is a function of Israel's age structure. That is, large cohorts of Jews and Arabs are about to reach their 70s and 80s, which is when age-specific mortality rates climb sharply. The differences in the magnitude of these increases among Arabs and Jews reflects both faster growth in the elderly Arab population and higher Arab age-specific mortality at those ages.

Figure 2. Projected number of deaths, by subpopulation



Source: Alex Weinreb, Taub Center | Data: Projections based on CBS data from 2009–2019 (see footnote 2)

It is important to note that the Figure 2 estimates are conservative. They assume that reductions in age-specific mortality until 2028 continue at the same pace as in the 2009–2019 period. Increasing morbidity at older ages, reflected in the flattening of the life expectancy gains relative to the late 20th century (Cardona & Bishai, 2018), raises questions about the validity of this assumption. That is, the number of deaths that Israel will experience is more likely to surpass these estimates than to fall short of them.

Fertility

Across the last ten years, the annual number of births in Israel has been remarkably stable. This is shown in the final column of Table 1, which shows that number, by religion, for 12-month periods beginning July 1, 2015 and ending June 30, 2025. In no single year has the number of births fallen below 179,000 or exceeded 185,000.

Table 1. Absolute number of births, by religion and year, 2016–2025

	Jews	Muslims	Druze	Arab Christians	Non-Arab Christians	Not classified	Total
2016	134,100	37,592	2,446	1,965	648	4,652	181,403
2017	134,630	39,550	2,350	1,877	627	4,609	183,643
2018	135,087	39,281	2,454	1,989	666	4,639	184,116
2019	134,800	39,096	2,361	1,906	622	4,532	183,317
2020	132,759	39,148	2,291	1,850	640	4,489	181,177
2021	131,873	38,352	2,261	1,781	686	4,234	179,187
2022	134,358	40,331	2,281	1,678	672	4,421	183,741
2023	132,460	39,364	2,159	1,729	588	4,124	180,424
2024	13,1934	39,310	2,023	1,538	584	3,804	179,193
2025	134,635	38,877	1,988	1,530	562	3,577	181,169

Note: "Not classified" refers almost wholly to Israel's "Other" population. Most are immigrants, or the children of immigrants, who are not halachically Jewish but have rights to citizenship through the Law of Return or through marriage.

Source: Alex Weinreb, Taub Center | Data: CBS

The stability in the absolute number of births disguises important shifts in the composition of Israeli births on two discrete axes: by religion; and by religiosity. It also disguises important differences in the trajectory of underlying fertility rates across religious groups, and in the relationship between absolute numbers of births and fertility rates across these groups. Here we clarify this relationship in order to better understand the context within which the mild war-related baby boom among Jewish women in Israel, described in last year's chapter (Weinreb, 2024), occurred. It will also help us point to future fertility trends with more confidence.

Religion

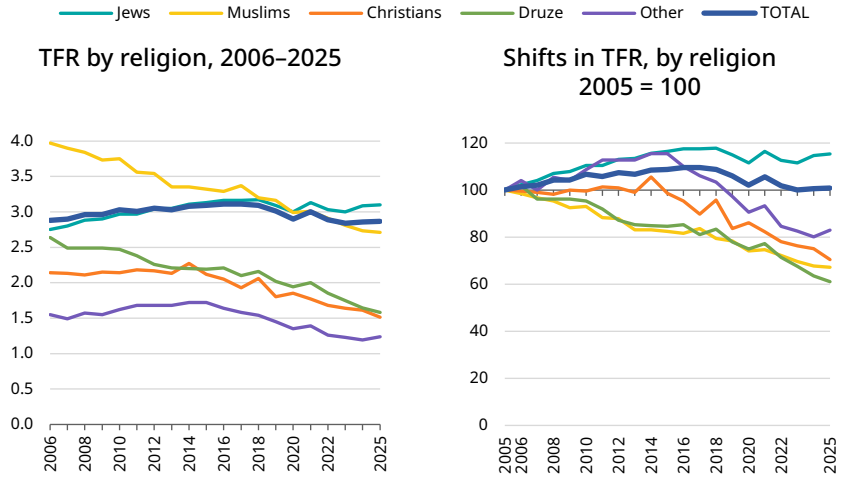
The left-hand panel of Figure 3 shows the period Total Fertility Rates (TFR) of women in Israel by women's religion over a 20-year period from 2006 to 2025.[3] The right-hand panel shows shifts in the TFR, relative to 2005.

These figures show that the overall stability in the absolute number of births since 2016 seen in Table 1 is occurring despite substantial reductions in the fertility rates of all groups, with the exception of Jews. Those reductions are an extension of longer-term patterns: a 30% reduction in fertility rates over 20 years for Muslim and Druze women; and a 30% reduction in rates over the last 12 years for Christian and Other women. In fact, Jewish women are the only religious group to have maintained relatively stable TFRs, and to have higher TFRs now than in 2005. This is in spite of a moderate reduction from 2018 to 2023 that was interrupted by a small baby bump in 2021, following COVID, and in 2024, starting around 11 months after the outbreak of the war in Gaza and continuing through the first six months of 2025. The result of all these shifts is that *Jewish women's TFR is now roughly double that of Druze and Christian women, and 0.4 children higher than that of Muslim women*.

These reductions in fertility rates do not translate directly into shifts in the absolute number of births. This can be seen by comparing the trends in Figure 3 to those in Table 1, which shows the absolute number since 2016. Among Jewish women, the number of births has remained stable in the 131,500 to 135,000 range, as has the underlying fertility rate. Among Muslim women, the number of births has also remained stable — in the 37,500 to 40,500 range — but in this case, it is despite an 18% reduction in the underlying fertility rate (from 3.29 in 2016 to 2.71 in 2025). Christian and Druze women have experienced reductions in both fertility rates and the number of births, though the former much faster: a 26% fall in Christian women's fertility rate led to a 22% reduction in births, whereas a 29% fall in Druze women's fertility rate led to only a 19% reduction in births.

3 The period TFR is a measure of how many children a woman will have, assuming that current age-specific fertility rates (at ages 20–24, 25–29, 30–34, etc.) remain stable. This is not an empirically robust assumption, especially in places, like Israel, that have undergone shifts in the age-pattern of fertility. Nevertheless, it remains the most widely used measure of fertility because it is both easy to measure, takes into account age-structure, and is sensitive to temporal changes. Later, we combine a time-series of age-specific measures of *children ever born*, an alternative measure of fertility, to generate more cohort-specific measures.

Figure 3. Israel's Total Fertility Rate (TFR) by religion



Notes: Data up to 2023 are official CBS estimates. The 2024 and 2025 estimates use a slightly different method, as discussed in Weinreb (2024).

Source: Alex Weinreb, Taub Center | Data: CBS

These differences in trends between fertility rates and the absolute numbers of births stem from the fact that the TFR is a measure of births relative to the number of women of reproductive age. By convention, that covers ages 15 to 49. In turn, this means that fluctuations in a population's age structure — in particular, in the number of women at peak fertility ages 25–34 — affects the translation of fertility rates into the number of births.

In Israel's Muslim population, growth in the number of women of reproductive age compensated for the 18% reduction in the overall fertility rate — applying a falling rate to a growing number of women yielded a stable number of births. Over the next ten years, that growth in the number of Arab women of reproductive age will slow and then halt for at least a decade. As of 2025, the number of Arab women aged 20–24 is around 8% larger than the number aged 25–29. The latter is 16% larger than the number aged 30–34, which in turn is 24% larger than the number aged 35–39. That rapid growth from one cohort to the next is about to end. The number of Arab women aged 15–19 and

10–14 is, respectively, 4% and 1% *smaller* than the 20–24 cohort. By the time these younger cohorts age into peak fertility years, any further reduction in the fertility rate will therefore pull down the absolute number of births in Israel's Arab population. Only substantial net immigration of young Arab women over the coming years will prevent that reduction in the number births.

The situation in the Jewish population is quite different. The number of Jewish women aged 25–29 is only 3% larger than the number aged 30–34, which in turn is 3.5% smaller than the number aged 35–39. In other words, the cohorts entering peak ages at fertility — late 20s to early 30s — have hardly grown over the last several years, leading to a more uniform relationship between the number of births and fertility rates. Over the next ten years, this will change, but in the opposite direction to the Arab population. The number of Jewish women aged 25–29 will grow by around 14% by 2030, and by around 23% by 2035. Unless fertility rates fall significantly — we show below some signs that this is happening — that increase in the number of women hitting peak reproductive ages will drive up the absolute number of births in the Jewish population.

A final consequence of these shifts in fertility by religion over the last several years is that the religious composition of births in Israel has also changed. This can be seen in Table 2, which shows the share of every 1,000 births in the 2016–2025 period by religion. From 2016 to 2022, the share of births to Jewish women fell from 73.9% of all births to 73.1%. As of 2025, it had climbed back to 74.3% of all births. Barring a sharp reduction in Jewish women's fertility, that share will rise more precipitously in the coming years as fertility rates in other religious groups continue to fall at a faster rate than in the Jewish population, and as the composition of the population at reproductive ages becomes more Jewish.

Table 2. Religious composition of every 1,000 births, by year

	Jews	Muslims	Druze	Arab Christians	Non-Arab Christians	Not classified
2016	739	207	13	11	4	26
2017	733	215	13	10	3	25
2018	734	213	13	11	4	25
2019	735	213	13	10	3	25
2020	733	216	13	10	4	25
2021	736	214	13	10	4	24
2022	731	219	12	9	4	24
2023	734	218	12	10	3	23
2024	736	219	11	9	3	21
2025	743	215	11	8	3	20

Note: "Not classified" refers almost wholly to Israel's "Other" population. Most are immigrants, or the children of immigrants, who are not halachically Jewish but have rights to citizenship through the Law of Return or through marriage.

Source: Alex Weinreb, Taub Center | Data: CBS

Religiosity

The second axis of fertility change in Israel is by religiosity within the Jewish population. This has long been the dominant predictor of Jewish fertility levels in Israel (Friedlander & Feldman, 1993). It also influences fertility in Israel's Arab population, though less definitively.

The most widely circulating estimates of fertility trends by religiosity in Israel are those of Hleihel, who combines administrative data on fertility with reported religiosity in the Israel Social Survey (ISS), updating estimates every couple of years. Here we supplement the latest Hleihel (2025) estimates, which include 2023 data, though these are folded into a three-year mean,[4] in two ways: first, by using TFR data from *yishuvim* with at least 10,000 residents, categorized by religiosity and extending through 2023; and second, by drawing on our own analysis of ISS data up to the end of 2024. Each of these data sources has

4 Hleihel (2025) folds the 2023 estimates into a three-year mean covering the 2021–2023 period. This is how Hleihel addresses the small sample issues in the Israel Social Survey, the source of his religiosity identifier. That is an effective solution for establishing a robust trend line. The cost is a loss of sensitivity to annual fluctuations.

advantages and disadvantages, and each complements the other's weaknesses. By using both, we provide a fuller picture of the context within which any war-related shifts in fertility occurred, in terms of religiosity.[5]

Fertility across yishuvim

We generate a single measure of TFR for five predominantly Haredi cities or towns in the sample — Bnei Brak, Modi'in Illit, Beitar Illit, Elad, and Rechasim — by estimating a weighted mean of the TFR across these five cities. The weight is each city's population aged 20–49, that is, within the core reproductive age. We create an equivalent measure for cities that include substantial Haredi populations (based on the CBS "Haredi homogeneity index"): Jerusalem, Beit Shemesh, Ashdod, Tzfat, Ofakim, Giv'at Ze'ev, and Arad.

To provide a comprehensive picture of fertility by religiosity in Israel's Jewish population up to 2023, Figure 4 includes a suite of graphs combining both types of data on TFR since 2014. From left-to-right, they include the most recent estimates from Hleihel, estimated TFR in three core categories of yishuvim, and estimates across the largest cities (at least 200,000 residents) and secondary cities (100,000–199,999 residents).

All point to a slow and moderate reduction in fertility over the 2014–2023 period. This has occurred at all levels of religiosity, whether looking at the individual-level measure (Panel A) or the yishuv-level measure (Panel B). The reduction can also be seen in almost all major cities. In fact, as of 2023, the TFR in

5 The key advantage of the yishuv data is that they contain data on all births in the 143 largest Israeli cities and towns, so are not affected by sampling error within those towns. This is particularly useful in discussions of Haredi fertility, since sampling error is the bane of all CBS survey data on Haredim. The key disadvantage of the yishuv data is they do not include data on 2024 or 2025. They therefore cannot tell us anything about the recent war-related bump in fertility. They also miss the smallest yishuvim where fertility tends to be a little higher and are officially within the ISS sampling framework. Robustness checks to compare the yishuv estimates to official national ones in 2014–2023 period show that missing these smaller yishuvim leads to an underestimate of actual TFR by 0.04–0.09 children. Since there are very few small Haredi yishuvim — Haredim are a disproportionately urban population — we can assume that the undercounting is concentrated among non-Haredi Israelis.

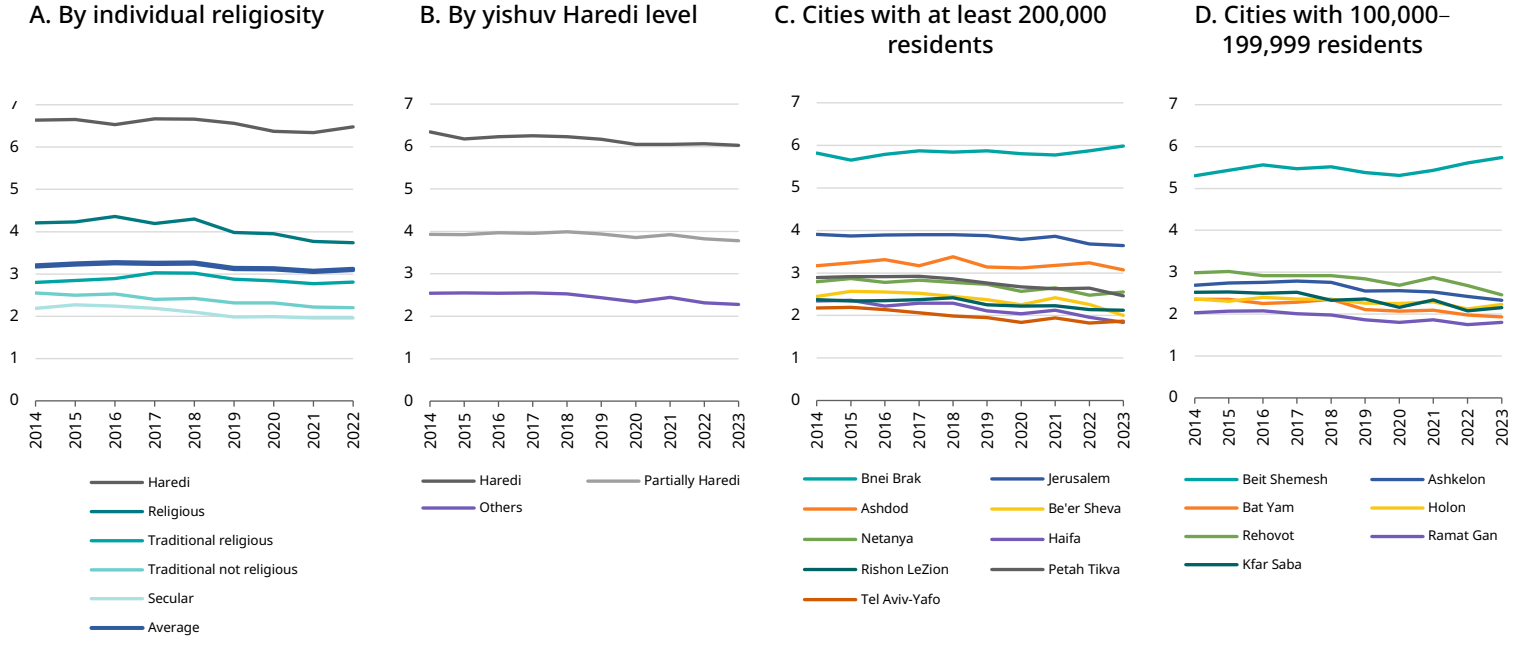
The key advantages of the ISS data are the more comprehensive sampling framework and the fact that data are available up to 2024. Unfortunately, we can capture only part of that war-related effect in the ISS data, since only births from July 2024 were conceived, on average, after October 7, 2023.

Tel Aviv, Haifa, Be'er Sheva, Ramat Gan, and Bat Yam were all at or below 2.0, and a number of others were hovering close. None of these cities were below 2.0 prior to 2018. In addition, cities that had a TFR close to 3.0 in 2014 — including Petah Tikva, Rehovot, and Netanya — had all fallen to below 2.5 by 2023.

In terms of individual city estimates, the exceptions to this general downward trend are Bnei Brak, Ashdod, and Beit Shemesh. However, each of these is included in the population-weighted averages in Panel B, in which there is a reduction. Specifically, the increase in Bnei Brak is outweighed by much larger reductions in TFRs in Modi'in Illit and Beitar Illit, and the increase in Beit Shemesh — likely driven by its increasingly Haredi composition — is outweighed by reductions in Jerusalem.

Even as fertility has fallen, the fertility gap between different levels of religiosity in these yishuv data has remained constant in absolute terms: Haredi Jews had around four more children than their non-religious (secular and traditional) counterparts in both 2014 and 2023. If that continues, it implies that the share of Israeli children being raised in Haredi communities and educated in Haredi schools will climb even faster than current projections suggest. Of course, how many of those children remain within the Haredi community is a different question.

Figure 4. Total fertility rate among Jews, by religiosity (A, B), and in the large cities (C, D)



Source: Alex Weinreb, Taub Center | Data: (A) Hleihel (2025); (B–D) CBS tables

Fertility by religiosity in the Israel Social Survey

It is not possible to calculate measures of TFR from ISS data, so instead we focus on an alternative measure called "children ever born" (CEB), also by age group, replicating calculations on ISS data in five-year intervals beginning in 2004. This allows us to generate estimates of fertility rates in *real (birth) cohorts* instead of *synthetic cohorts* for a full two decades up to and including 2024.[6]

To smooth fluctuations stemming from sampling error across small groups we combine religious groups into a smaller number of categories. We use three categories of religiosity in the Jewish sample: "Haredi;" "religious," including "traditional religious;" and "secular," including "traditional not religious." In the 2024 ISS data, these constitute 15.0%, 23.3%, and 61.7%, respectively, of the Jewish sample. We use two categories of roughly equivalent size in the Arab sample: "religious," including a very small sample of respondents who self-identified as "very religious;" and "not so religious," including "not religious." Muslims account for 86% of the Arab sample overall, though they are 95% of Arabs self-identifying as "religious" and only 77% of those self-identifying as "not so religious."

Initial measures across these five waves of the ISS are shown in Figure 5. To facilitate easier interpretation of each group, different numeric scales are used across the three Jewish/Other graphs.

Since age-specific fertility rates peak in women's late 20s and early 30s, knowing fertility at these ages is the most important for predicting future levels of completed fertility. Specifically, reductions in fertility at ages 25–29 do not necessarily reduce completed fertility levels — that is, the number of live births a woman experiences throughout her life — since there can be a compensating rise in fertility in a woman's 30s, especially the early 30s. Indeed, this is exactly what happened in Israel after the 1990s. The expansion of higher

6 An example of a *real birth cohort*: women aged 20–24 in the 2004 ISS data were 25–29 in the 2009 data, 30–34 in 2014, 35–39 in 2019 and 40–44 in 2024. Combining these five waves of data therefore allows us to track the 25-year CEB history of women born in 1980–1984, albeit with a different random sample drawn from that birth cohort in each survey wave. The same five waves of data allow us to follow three other birth cohorts of women past peak fertility ages of the late 20s and early 30s. We follow those born in 1975–1979 and 1985–1989 for 20 years, and those born in 1990–1994 for 15 years. In contrast, a *synthetic cohort* measure, like the standard TFR, combines the age-specific measures collected in a single year (*cross-section*). Hence the fine-print that points to "assuming current age-specific rates remain constant."

education helped raise the mean age at first birth among Jewish women by 2.8 years between 1994 and 2016 (Weinreb et al., 2018) but overall fertility levels remained constant and even climbed.

However, where CEB falls substantially at both ages 25–29 and 30–34, there is no historical case of which I am aware of a compensating effect at higher ages at the societal level, even if there is motivation to have more children. The main reason is biological constraints: there is an increasingly sharp decline in women's fecundability across their 30s (Menken, 1985), especially among nulliparous (i.e., childless) women (Rothman et al., 2013).

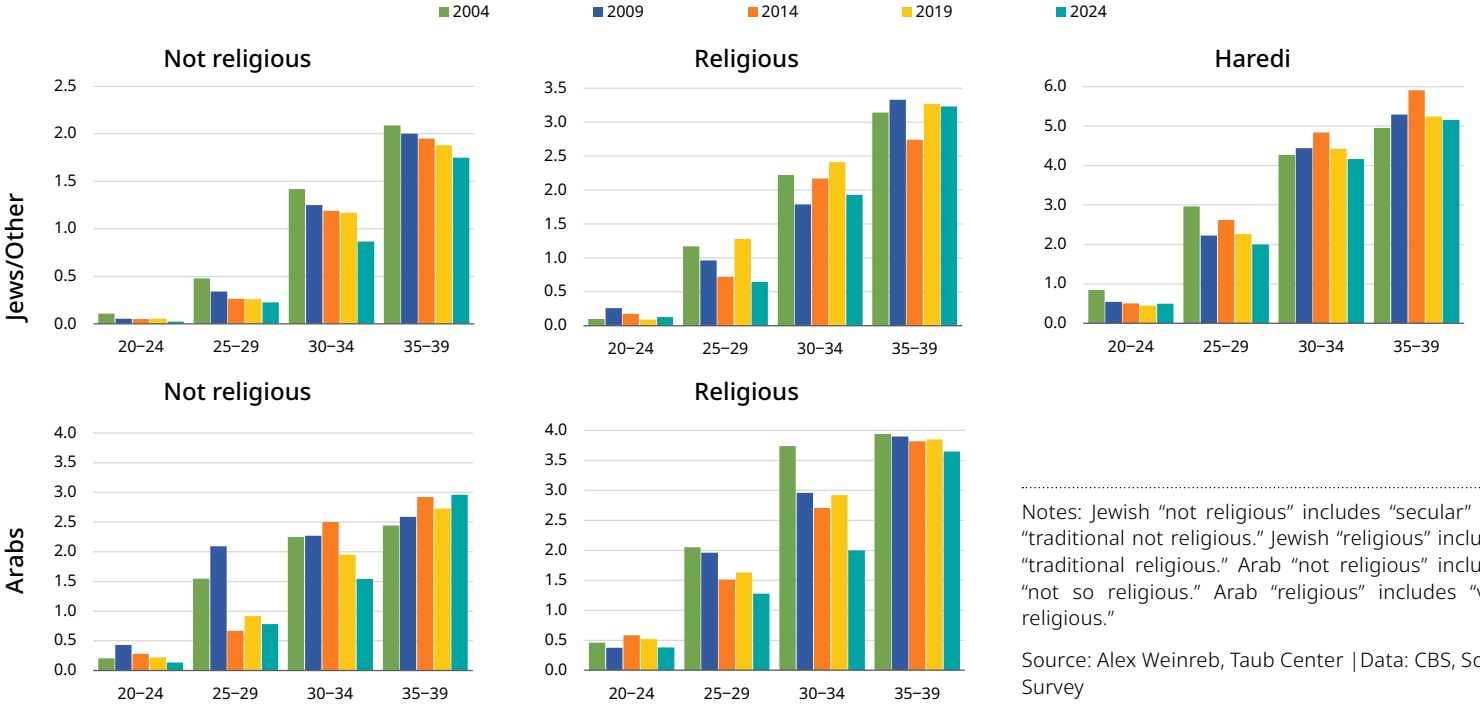
There are clear signs of a reduction in CEB in the 25–29 age group at every level of religiosity in both the Jewish and Arab populations. In all five groups, there are also signs of a reduction in CEB at ages 30–34, though in some — notably the Haredi and non-religious Arab population — this has only been since 2014.

These are meaningful reductions. The average CEB of non-religious Jewish women aged 30–34 in the 2004 survey was 1.42 children (the standard error around this estimate is 0.045, so the value in the actual population should fall in the 1.33–1.51 range).[7] By 2019 it had fallen to 1.17 (± 0.102) and by 2024 to 0.87 (± 0.104). This 0.3 child reduction in the last five years occurred despite the fact that there was no statistical difference in CEB in the same two birth cohorts measured five years earlier — 0.27 and 0.26 for women aged 25–29 in 2014 and 2019, respectively.

7 Following standard practice, I define the range as the mean estimate ± two-times the standard error (SE) of the mean. The SE is a measure of the precision of the estimate that takes into account both the standard deviation (dispersion of all values around the mean) and sample size. Given customary assumptions, there is a 95% probability that this range — called a *confidence interval* — will contain the true population mean. Formally, the SE is the standard deviation (σ) divided by the square root of the sample size for that group (n), that is: $SE = \sigma/\sqrt{n}$.

Smaller sample size is the main reason for the larger SE in the Haredi and Arab samples.

Figure 5. Children ever born, by mother's age, religiosity, and year



Notes: Jewish "not religious" includes "secular" and "traditional not religious." Jewish "religious" includes "traditional religious." Arab "not religious" includes "not so religious." Arab "religious" includes "very religious."

Source: Alex Weinreb, Taub Center | Data: CBS, Social Survey

Among Haredi women, the fall was even larger, though smaller sample sizes reduce confidence in the accuracy of those estimates. The average CEB of Haredi women aged 25–29 in the 2004 survey was 2.96 children (± 0.408). By 2024 it had fallen to 2.0 children (± 0.45). During the 2004–2014 period, the reduction in CEB at ages 24–29 — preceded by a similar reduction at ages 20–24 — was negated by a compensating increase in CEB among women in their 30s. Since 2014, however, there has also been a reduction in CEB among Haredi women in their 30s: from 5.91 (± 0.64) to 5.15 (± 0.56).

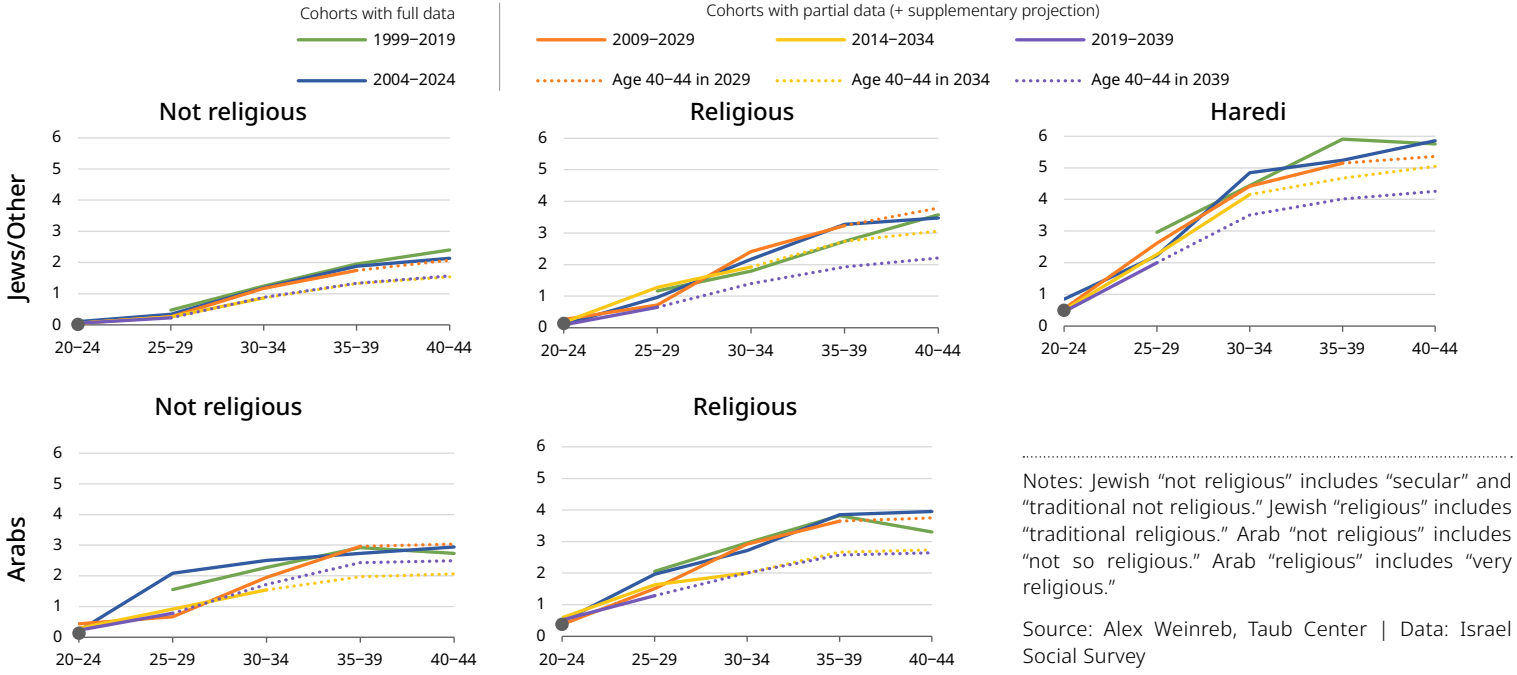
Consistent with the trends in Figure 3, these CEB data also point to substantial reductions in the Arab population. The CEB of religious Arab women at ages 25–29, in particular, fell from 2.05 in 2004 to 1.28 in 2024, and at ages 30–34 from 3.74 in 2004 to 2.0 in 2024. The CEB of non-religious Arab women at ages 25–29 is now less than 1, and at ages 30–34 has fallen from 2.5 in 2014 to 1.5 in 2024.

Projecting completed CEB for younger cohorts

As a final exercise, we construct women's birth cohorts from these data and project CEB by age for women aged 25–39 (in the 2024 data) up to the 40–44 age group for the same five subpopulations shown in Figure 5. We do this by first estimating a CEB age-pattern: the proportionate increase in CEB at age x at time t, relative to the CEB of the same cohort five years earlier (that is, at age x-5 and time t-5). We then project missing values for younger ages up to ages 40–44. This counts as a reasonable end point for women's reproductive lifespan since there is very little fertility at ages 45+ at the population level. We do this by multiplying the reported CEB in the ISS survey by a factor that sums the relative increase in CEB between age x and x+5 in the next two older cohorts.[8] Using the oldest cohorts would dilute any recent shifts in the CEB age pattern. Note, too, that we do not project fertility for women aged 20–24 in 2024 since they only have a single data point.

8 Formally, $CEB_{x,t} = CEB_{x-5,t-5} \cdot (F_{x,t})$ where $F_{x,t} = (CEB_{x,t-5} + CEB_{x,t-10})/(CEB_{x-5,t-5} + CEB_{x-5,t-10})$.

Figure 6. Children ever born, by mother's cohort, age and religiosity, including projections to age 40–44 for women currently aged 25–39, years cohort is aged 20–24 to 40–44



Notes: Jewish "not religious" includes "secular" and "traditional not religious." Jewish "religious" includes "traditional religious." Arab "not religious" includes "not so religious." Arab "religious" includes "very religious."

Source: Alex Weinreb, Taub Center | Data: Israel Social Survey

The results of these estimates, shown in Figure 6 — this time with the same y-scale for all populations — point to the magnitude of the ongoing reductions in fertility in women's late 20s and early 30s. Given those patterns, the average completed fertility rate at ages 40–44 for secular Jewish women in the mid- and late 2030s will be around 1.6 children. For religious women, the number will drop to around 3.1 then 2.3 among those reaching age 40–44 by 2034 and 2039, respectively. For Haredi women, the respective numbers of CEB will fall to around 5.1 and 4.3.

Trends in the Arab population are similar. Completed fertility of less religious Arab women will fall to around 2.5 and 2.1 for women currently in their early 30s and late 20s. That of their more religious counterparts will fall to around 2.7 for both cohorts.

In each of these cases, we can add 0.1 or even 0.2 children to allow for supplemental fertility in women's mid- to late 40s. Even with those additions, CEB of younger cohorts will be much lower than those of their older counterparts. Those reductions are built-in, unless the there is a sharp rise in fertility at older ages. There is no sign of such a shift in Figure 5 after 2014.

Summarizing fertility

The remarkable stability in the annual number of births in Israel over the last ten years provides an illusion of stasis. Beneath those stable absolute numbers, the fertility rates of Jewish and non-Jewish populations have been falling sharply. Secular and non-religious Jewish women, in particular, are on the path towards completed fertility of around 1.7 children per woman. That is only slightly higher than the average current levels of fertility in northern European and north American countries.

The stability in the number of births is also disguising the fact that after a long and steady decline, the share of births that are Jewish has, in the last few years, started to climb. This is due almost solely to an increasing share of younger Jewish Israelis being born into religious and Haredi communities. Of course, and as noted above, how many of them remain in those communities through the life course is a separate question. Prior estimates, in need of updating, point to a net 15% movement out of the Haredi population between birth and early 20s (Weinreb & Blass, 2018).

SPOTLIGHT

Israel's Rate of Natural Increase Is Falling

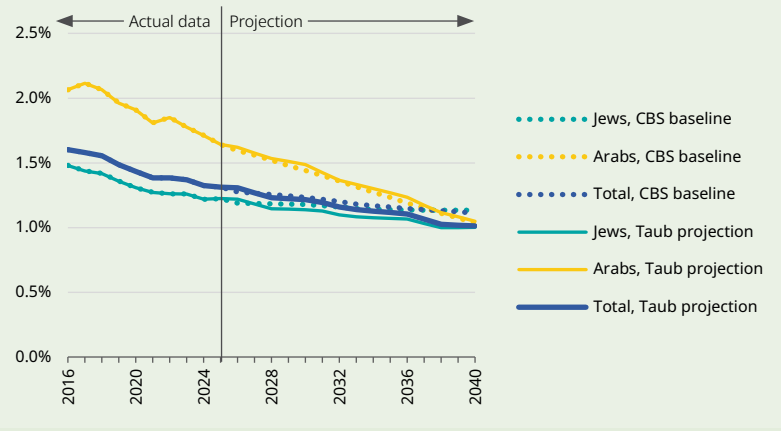
A population's rate of natural increase is the growth that stems from the difference between the number of births and deaths that occur in a particular time period, divided by the population at the beginning of the time period. In other words, it is growth absent any effect of migration.

Figure 7 presents Israel's rate of natural growth from 2016 to 2025, adding a projection to 2040 based on the anticipated number of deaths and births. The baseline population used for the projection is from a subset of Taub Center population estimates that do not include any contribution of migration. Those estimates were generated as part of the Taub Center's population projection model (Weinreb, 2020). For comparative purposes we also use the CBS medium-scenario population projection, even though these include migrants.

Between 2016 and 2025, Israel's annual rate of natural increase fell from 1.60% to 1.31%. The reduction was particularly rapid in Israel's Arab population, whose rate of natural increase fell from 2.07% to 1.64%. This was mainly driven by the stability in overall number of births as the number of deaths rose by 43% — following a rapid increase in the Arab elderly population. In the Jewish/Other population, the rate fell from 1.48% to 1.22%. This was a more moderate reduction because even though the number of births remained stable, the number of deaths increased by only 12%.

Figure 7 also shows that these rates will continue to fall in both major subpopulations. As a result, by 2040, Israel's annual rate of natural increase will be around 1.0%, with only minimal difference between Jews and Arabs.[9]

Figure 7. Israel's recent and projected rate of natural growth (%), by subpopulation, 2024–2040



Note: For any given period t to $t+n$, the rate of natural growth is: $(Births_{t,\,t+n} - Deaths_{t,\,t+n})/Population_t$. For convenience, we present these as annual percent growth.

Source: Alex Weinreb, Taub Center | Data: Taub Center projections of number of births and deaths, population without migration; CBS medium-scenario population projections

9 The divergence between the main projections (using Taub population estimates) and those using the CBS projections stems from the inclusion of migrants in the CBS estimates. Since migrants to Israel, like migrants in general, disproportionately arrive in early adulthood, they contribute more over their first 20 years (the timespan of these projections) to the number of births than to the number of deaths. That inflates rates of natural increase. In addition, since almost all net migration to Israel adds to Israel's Jewish population, the difference between the Taub and CBS-based estimates are much more notable in the Jewish population.

These trends are important because they point to a shift in the source of Israel's demographic growth. For almost two decades until the COVID pandemic, at least 80% of Israel's demographic growth in any given year stemmed from natural increase. The remaining growth stemmed from net migration. Over the last few years, that balance has shifted. The ongoing reductions in fertility and impending increases in the number of deaths mean that migration (positive or negative) will play a more significant role in Israel's future demographic growth than it has over the last 20 years.

This shift is moving Israel closer toward patterns of Israel's first decade — between 1948–1960, migration accounted for 65% of Israel's demographic growth (Raijman, 2009) — and toward standard demographic patterns in high-income countries. Nonetheless it is important to emphasize that Israel is not completely converging to standard demographic patterns in those countries. In most other high-income countries, deaths either exceed births, making rates of natural increase negative, or the numbers of each are very similar. That means that other high-income countries depend on migration for any substantial demographic growth. In Israel, in contrast, births will continue to exceed deaths by a substantial margin for the foreseeable future. However, Israel will no longer experience 1.9%–2.0% annual growth as a matter of course. In fact, it will need positive net migration to maintain a growth rate exceeding 1.3% per year in 2025, 1.2% per year by 2030, and 1.0% per year by 2040.

These facts add to the importance of understanding Israel's migration patterns.

Migration

Migration to and from Israel has been the least stable of the three components that drive demographic change in Israel. In 2024, for only the fourth time in the last century,[10] it drifted into negative growth. The number of people recorded as leaving Israel exceeded the number moving to Israel, including *olim*, by 26,000 people. Based on migration data from January until September, that net loss will be even larger in 2025: around 37,000 people.[11]

This drift into negative numbers looks like a major change in Israeli demographic patterns. It has certainly heightened anxiety about compositional shifts in the population, as did previous upticks in emigration. Since at least the 1970s, journalists, activist-researchers and others have repeatedly claimed that Israel is losing a disproportionate share of its most educated people, and that this endangers the country's economic growth and future. Some of these claims have appeared in overtly activist venues (Lahis, 1980), others in peer-reviewed academic publications (Gould & Moav, 2007; Kass & Lipset, 1979). Countless others have appeared in the press: a search for "brain drain" in Israeli newspapers from the 1980s until the present conducted through the National Library's database yielded hundreds of articles. Among them are some from 20 years ago warning about the coming demise of the high-tech sector and subsequent fiscal collapse of the state.[12]

It is always unwise to dismiss contemporary concerns just because they echo older jeremiads since proven wrong. Equally, however, the fact that past prognostications on this issue have been wrong also cannot be ignored. In that vein, the principal goal in this section is to highlight five empirical findings that need to be part of any discussion of emigration in Israel: note that the initial focus is less on immigration, including olim.

10 S. Della Pergola, personal communication, November 2025.

11 The 2025 data reported here are annualized from January–September 2025 numbers. We assume the same proportionate shift in 2025 between January–September and October–December that occurred in 2024. Formally, this can be represented as:

$$S_{2025}^{1:12} = S_{2025}^{1:9} \times \frac{S_{2024}^{1:12}}{S_{2024}^{1:9}}$$

Where S is the sum of annual migration across either 9 or 12 calendar months.

12 Analysis of the Israeli commentariat's cyclical anxiety about these patterns, which have at least some of the characteristics of what social scientists call a "moral panic" (media amplification, exaggerated public concern), would be a good dissertation topic in cultural studies or the sociology of science.

1. The number of Israelis leaving Israel, including Israel-born citizens, has been rising, while the number returning has been flat and, most recently, fallen.
2. The number of Israelis registered as leaving Israel will continue to be high until at least June 2026.

The remaining three findings qualify these first two in important ways.

3. Israel's emigration rates are generally low in international comparison.
4. Israeli emigration is disproportionately remigration of non-native-born Israelis.
5. Native-born Israeli emigrants are diversifying their destinations.

Together, these five findings show that there is more to Israel's current migration story than meets the eye. This also means that at least part of the conventional commentary on migration, especially emigration, is misleading. Sometimes observers appear to misread administrative statistics. Sometimes the administrative statistics are themselves misleading. Some of these problems stem from the inherent difficulty with measuring migration. That has been compounded by a recent shift in CBS measurement criteria for long-term migration. We describe these as we point to the most recent migration trends in the first section.

Shifts in how the Israeli census bureau measures migration affect published rates

Meaningful discussions of trends in immigration and emigration need to be anchored in accurate measurement. Even at the best of times this is difficult in studies of migration because measuring migration is more complicated than measuring births and deaths, the other two core demographic components. The latter are one-time events. Migration is not: it is not typically measured at the specific time of departure; it can be circular; people who leave make frequent trips back, maintain local bank accounts, payments to national insurance, and so on. Formal emigration, in other words, is more processual

than dichotomous, which makes it more difficult to track using the categories favored by national statistical offices in Israel and elsewhere, and also more difficult to cleanly identify with a particular date.

A recent change in measurement criteria at the CBS — fully justified on methodological grounds — has just compounded this problem by making it more complicated to track trends in migration in Israel.

Until 2022, someone counted as having emigrated from Israel if they spent 365 consecutive days out of the country. They counted as having returned to Israel if they spent at least 90 consecutive days in Israel. In 2023, these flawed criteria were changed in two ways. First, the asymmetry was eliminated. Someone now counts as having emigrated from Israel if they spend 275 days in a given calendar year outside Israel, consecutively for the first 90 days. Likewise, they count as having returned to Israel if they spend 275 days in a given calendar year in Israel, consecutively for the first 90 days. Second, the reference year of the measure was shifted. Until 2022, migration data referred to the assumed day of migration (i.e., when someone was marked as having left or entered the country). Under the new method, the data relate to when the 275-day follow-up period ends.

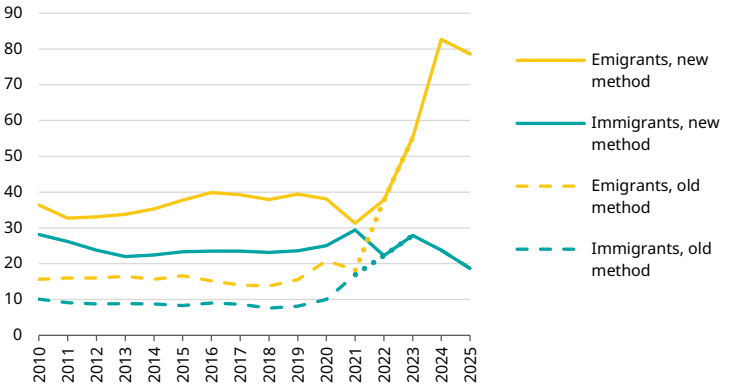
Because this new method applies the same number of days to both in- and out-migrants, and is better suited to movements in the modern labor market, it yields a more valid measure of migration than its predecessor. The main problem is that it has markedly shifted migration rates.[13]

Figure 8 highlights these effects. In- and outmigration under the old method, whose final estimate covers 2021, were much lower than under the updated method. If someone naively combined those older estimates with the new ones, they would see a rapid rise in outmigration towards the end of the period, shooting up from around 15,600 in 2019 to 37,600 in 2022, 55,300 in 2023 and almost 83,000 in 2024. They would also see substantial increases in Israelis returning: from 8,100 in 2019 to more than 20,000 per year in the 2022–2024 period.

13 Less serious, it has also created a discontinuity in the migration data times series: until the last few months, recent CBS migration tables have often skipped 2022. Here, I follow a special CBS report on migration in 2024 (CBS, 2024) and estimates in Eliyahu (2025).

Figure 8. Trends in the number of Israeli emigrants and immigrants (not including olim), by method

Thousands



Note: 2025 data are annualized from January–September 2025 numbers as per footnote 11.

Source: Alex Weinreb, Taub Center | Data: CBS

That naive reading is clearly flawed. Data on in- and outmigration from 2022 to 2025 can only be compared to estimates produced using the same methods. Across the 2010–2021 period, the new methods generate estimates of outmigration and return migration that are, respectively, 2.3 and 2.6 times higher than the old methods. They still point to a substantial increase in outmigration in 2023 that continued in 2024 and 2025, but 2022 is on par with outmigration in the 2015–2020 period: it is in the 37,000–40,000 range. Likewise, return migration rates are also much higher in the decade preceding COVID, but barring the slight bumps in 2021 (reflecting COVID) and 2023 (those who returned for the war), they are flat across all years. The number of returning Israelis has not increased in the last few years. On the contrary, whereas 2024 numbers were similar to the annual averages in the 2013–2018 period, the latest 2025 data point to a sharp decline to less than 19,000 Israelis (this is an annualized figure based on the number of returning Israelis recorded between January and September 2025).

It is unfortunate that the change in the CBS measurement criteria was introduced during a period of constitutional tension, war, and economic instability. Historically, emigration from Israel rises during those periods of disruptions (Cohen 1988, 2011). In either case, Figure 8 makes it clear that all apparent increases in outmigration up to 2022 are an artifact of change in measurement technique. The real increase only began in the 2023 data — though those increases are substantial. The number of Israeli emigrants in the 2024 and 2025 data is double the number in the 2018 data. At the same time, the number of returning Israelis has not increased. Combining these emigrants and returning immigrants across these two years, we see that almost 120,000 more Israelis were recorded as leaving Israel in 2024 and 2025 than returned to Israel. This is not the true net migration rate — it does not include olim, who we shall add below. However, it is a historically unprecedented level of negative net migration for Israel.

High emigration looks likely to continue into 2026

The migration data used above have a timeliness problem. The most recent data on emigrants and returning Israelis that we use are from September 2025. However, as noted above, those reflect movements that occurred at least 275 days (nine months) earlier, that is, in 2024. If our goal is to understand the most recent movements, that delay is a limitation.

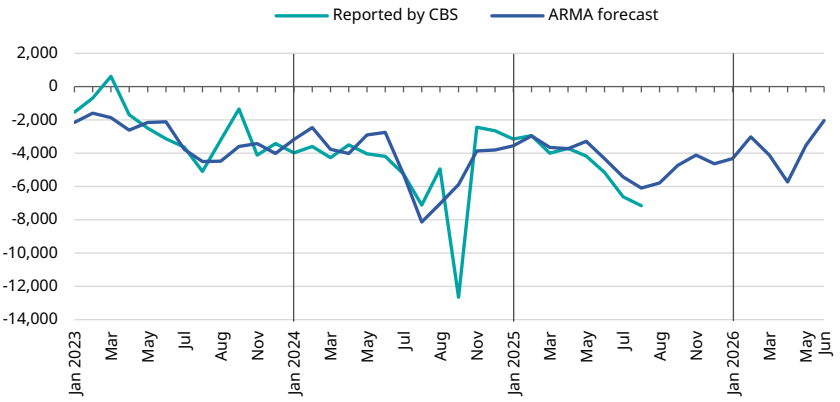
In an effort to help solve this timeliness issue, we project net migration nine months into the future by modeling the relationship between trends in the number of Israelis entering and exiting Israel and subsequent trends in official net emigration. The former are also published on an ongoing basis by the CBS and they reflect behavior a mere 1–2 months earlier.

We identify this relationship between the new CBS measure of net migration (from January 2023 until August 2025) and prior net exits of Israelis in a series of ARMA (Autoregressive Moving Average) models, described in the Appendix.

Using estimates from the optimal 11-month lag model, we predict net emigration both within the 32-month test sample and beyond it, up to June 2026. These estimates are shown in Figure 9 alongside the official emigration rate reported by the CBS. With the exception of sharp fluctuations in the reported statistic (e.g., in October 2023 and October 2024), the ARMA estimate tracks the official

data quite closely. This is confirmed by a high correlation coefficient of 0.72 calculated over the 32 months where both measures have values.

Figure 9. Reported and predicted net migration by month, not including olim



Source: Alex Weinreb, Taub Center | Data: ARMA models; CBS

The basic finding is that deterioration in the net migration into negative numbers over the first half of 2023 continued into 2024 and worsened considerably in the late summer and early fall of 2024, reflecting higher net emigration during the first four months of the war. Net migration improved (i.e., moved closer to zero) during the winter months and then started to deteriorate again by the summer of 2025.

The model projection suggests that net migration will improve somewhat from its very low point during the summer of 2025. However, projected net outmigration in the first half of 2026 will be higher, reflecting the larger streams of exits in the summer months. The projected monthly net emigration level of 3,800 people between January and June 2026 remains higher than the average observed level in the same months in 2025 (3,600) and 2024 (3,100).

Of course, these projections assume that the relationship between net entries/exits and subsequent emigration that existed over almost three years up to September 2025 — including in the pre-war period — holds into next year. Given the end of active hostilities in the war in Gaza, this need not be the case. In particular, migration activity tends to spike over the summer months, so if there is a shift in this pattern, it will only become noticeable in CBS tables in the spring of 2027.

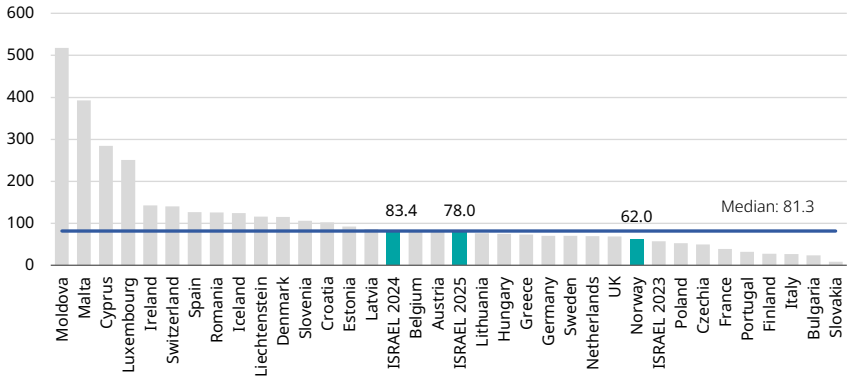
Israelis' emigration in international comparison

Having established that outmigration in Israel climbed substantially in Israel since late 2023, we now ask how those higher Israeli rates compare to rates in other high-income countries.

This is important because a combination of globalization, liberalized borders, transnational networks, and mass displacement have led to a surge in international migration over the last few decades, what Castles and Miller (1993), in their frequently updated monograph, call the *Age of Migration*. It is an era in which high-income countries actively compete for high-skilled workers, increasingly try to convince their own emigrants to return (Bruzelius & Reiss, 2025), and also, in many cases, quietly allow the immigration of low-skilled workers in the hope of reducing labor costs in sectors — like agriculture and construction — where workers are scarce.

To look at how trends in Israelis' outmigration compare to those of other countries, we calculated the crude rate of outmigration (CROM) — the number of outmigrants in a given year divided by the population in the middle of the year — for all European countries in 2023, adding data for Israel in 2023, 2024, and 2025, using a combination of estimates presented in CBS (2024) and Eliyahu (2025). Results are shown in Figure 10.

Figure 10. Crude outmigration rate in EU countries, 2023
Per 10,000 residents



Source: Alex Weinreb | Data: Israel: Eliyahu 2025; UK: ONS; All other countries: Eurostat Emigration by age group, sex and citizenship [migr_emi1ctz$defaultview]

Israel's CROM in 2023 was 57 emigrants per 10,000 residents. That is high by Israeli standards but relatively low by EU standards. Israel's CROM climbed to 83 per 10,000 in 2024, unusually high for Israel but only just above the EU median in 2023. Based on patterns annualized from January–September 2025, discussed above, its rate in 2025 should be around 78 per 10,000, so below the median.

This low CROM relative to other high-income countries is consistent with longstanding patterns. Cohen (2011) compared Israel's outmigration rates to those of other high-income countries — including after the previous spike in outmigration (associated with the Second Intifada). His conclusion still holds: "Considering Israel's population composition (high rates of foreign-born), security situation, and grim prospects for a lasting political settlement with the Palestinians, Israeli emigration rates are surprisingly low" (Cohen, 2011, 52).

Remigration of foreign-born

The outmigration data shown thus far combine Israel-born citizens and foreign-born citizens. In terms of understanding migration, that is problematic because a one-time migrant is much more likely to *remigrate*, that is, migrate a second time. That happens because, at the individual level, migrations often fail, even when the migrant intended to stay in the destination country. Remigration can include both *return migration* (to one's country of origin) or what is variably called *onward* or *stepwise migration*: using a first destination as a stepping stone to a second location. Although this multistage type of migration is under-researched — data sources rarely track individuals across countries (Boissonneault & Costa, 2022; Della Puppa et al., 2021; OECD, 2024) — it is a well-known feature of modern migration patterns. Recent data from the OECD Migration Outlook point to five-year remigration rates in immigrant-friendly anglophone countries (US, Canada, Australia, UK) in the 10%–14% range. Historically, remigration rates were between 25%–40% in the US (Jasso & Rosenzweig, 1990).

Remigration in general

Remigration is also a well-known feature of Israel's migration history — hence Cohen's reference to "high rates of foreign-born" in the quote above. It is one of the major explanations for the uptick in Israeli outmigration rates between 1990–2005: around 48% of the 230,000 Israeli emigrants in that period were immigrants from that period, mostly part of the enormous wave from the FSU (though those leavers constituted only around 10% of those who immigrated to Israel, suggesting 90% retention, which is high). Cohen (2011) mentions other examples: how some Persian Jews who fled revolutionary Iran in the late 1970s used Israel as a stepping stone to the US; and how some of the Argentine Jews who escaped the economic meltdown in the early 2000s subsequently returned home or moved elsewhere.

The most recent trends suggest that foreign-born, recent olim in particular, play an even greater role in recent outmigration. Between 2015 and 2020, the share of foreign-born Israeli out-migrants climbed from 45% to 55%. It was 56% in 2023, of whom 31% were olim from 2022, 7% olim from the 2018–2021 period, and 21% were olim from prior years (Eliyahu, 2025). The share of foreign-born Israelis among out-migrants climbed further to 58% in 2024 and then dropped back down to 48% over the first nine months of 2025.

That disproportionate presence of Israelis not born in Israel in the flow of emigrants leaving Israel is reflected in the stock of Israelis overseas. Again, this is a long-term trend. Cohen (2011) notes that of the 544,000 Israelis who resided outside Israel at the end of 2006, only 45% were born in Israel. Staetsky's (2025) more recent estimate, covering the 2021–2023 period, is 48% (of 630,000 Israelis living outside Israel).[14] We return to the stock of Israelis outside Israel below.

In general, these remigration statistics point to two distinct phenomena that help us understand recent Israeli outmigration. First, retention rates of olim are lower now than they were. Only 10% of the massive 1990–2005 wave of aliya had left by 2005. The share of 2022 immigrants who left in 2023 has already passed that threshold. More of them, in other words, appear to be what has been referred to as *opportunistic immigrants*. Or, perhaps, Israeli society has become less welcoming or effective at absorbing these immigrants.

Second, although they constitute a diminishing share of emigrants, in terms of absolute numbers, more native-born Israelis are also leaving. We address each of these in turn.

Remigration of non-Jewish olim

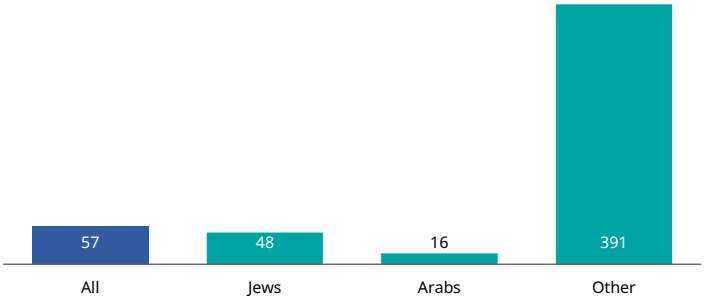
The increasing remigration rates of olim — and on the flipside, their falling retention rates — appears to reflect the fact that an increasing share of Israeli immigrants over the last decade have been neither halachically Jewish (according to Jewish religious law) nor Arab: they mainly fall into Israel's Other population; a small share are categorized as non-Arab Christian. Raijman (2009) reports that among olim from the FSU, in particular, only 5% of those who came in the enormous 1990 and 1991 aliya wave were not considered Jewish. This share rose, climbing above 50% of FSU olim from 1999 (the average across the period 28.4%, relative to 19.5% and 12.8% of olim from Ethiopia and Western countries, respectively).

14 The methods that Cohen (2011) and Staetsky (2025) use to produce these estimates are not identical. If we assume they are both generally correct, however, they suggest that the total population of Israelis living overseas grew by around 16% over the 2006–2021 period. In the same period, Israel's own population grew by around 33%. Israelis outside Israel are, in other words, a smaller share of the total stock of Israelis today than they were.

As the share of Other olim has climbed, so has the share of emigrants from this population (Eliyahu, 2025; Kaplinski, 2023). Non-Jews who were not born in Israel — these are virtually all in the Other population — constituted 29.6% of all Israeli emigrants in 2023, 33.7% in 2024, and 27.8% in the first nine months of 2025, relative to around 15% between 2012 and 2018. These high percentages should be understood in relation to the share of Israel's total population that is classified as Other: respectively, 4.9%, 4.8%, and 4.7% in those years.

Figure 11 converts the 2023 data into a CROM — the number of outmigrants relative to the baseline population — for Israel as a whole and for each of Israel's three major populations.

Figure 11. Crude outmigration rate per 10,000 residents, by subpopulation, 2023



Source: Alex Weinreb | Data: Outmigration data from Eliyahu (2025); Population data from CBS

Around the 2023 CROM of 57 Israelis for every 10,000 residents (as per Figure 10), there is enormous variation by subpopulation. For every 10,000 Jews, including Jewish olim, 48 emigrated in 2023. For every 10,000 Arabs, 16 left. For every 10,000 Others, 391 left.

SPOTLIGHT

A Sharp Reversal in the Other Population's Growth

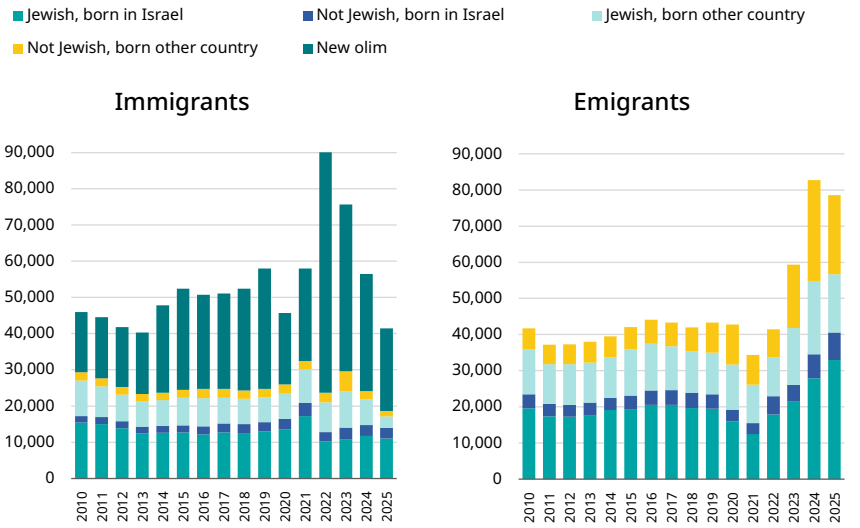
The disproportionate emigration by Israel's Other citizens has affected the size of that population. In the 2015–2019 period, Israel's Other population grew faster than any other subpopulation in Israel, including the Haredi population — annual growth rates surpassed 5% in 2017, 2018, and 2019. Yet from August 2022 to August 2024, despite large-scale immigration from the FSU that included people not halachically Jewish, the Other population fell by 22,400 people. By September 2025, despite ongoing high levels of aliya from the FSU (15,021 people) and roughly 1,000 more births than deaths (3577 births, 2566 deaths) in the same 12-month period, the Other population had fallen by an additional 10,000 people.

Net migration

We summarize these trends from 2010 to 2025 in Figure 12 for both immigrants and emigrants (the 2025 estimates are annualized from January–September 2025 data, as explained in footnote 11). As reflected in our comments thus far, the big story is emigration. Emigration of native-born Israelis has been rising steadily for the last four years. The increase in the first year was after an artificially low rate in the COVID year, but increases over the last three years are real. That is true of native-born Jews and native-born non-Jews: available data do not allow us to differentiate whether the latter are Arab or Other.

Relative to the averages in the 2014–2022 period, emigration in the two other categories (Jews or non-Jews born in other countries) has also dramatically increased. Relative to their share of the population, these are high rates of outmigration, especially for non-Jews born outside Israel.

Figure 12. Immigrants and emigrants, by type, whether born in Israel and whether Jewish



Notes: All groups other than "New olim" refer to Israeli citizens. Data for 2025 are annualized based on the ratio of annual number to January–September in 2025.

Source: Alex Weinreb, Taub Center | Data: CBS

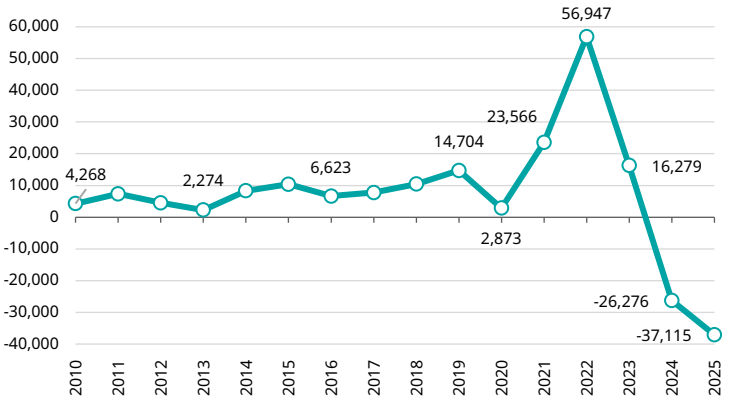
There have also been important fluctuations in immigration. The absolute number of returning native-born Israelis fell from 2010 to 2013, and was then relatively flat until 2020. A temporary COVID-related bump in 2021 gave way to a reduction in 2022, with small increases since then: more returning Israelis in 2023 and yet more in 2024: at the current pace, 2025 will be between these two years.

Even larger fluctuations can be seen in the number of olim. After a slow and steady increase in net migration from 2013 to 2019, it fell sharply in 2020, then rose dramatically in rebound year 2021, even more sharply in 2022 as the Russia–Ukraine War broke out, and then fell precipitously from 2023. Based on aliya rates over the first nine months, the number of olim in 2025 will be the lowest since 2013 (barring COVID year, 2020).

These joint shifts in emigration and immigration also reduce estimates of net migration. These are shown in Figure 13 (estimated in accordance with the CBS current method). Note that this is a graph of Israel's *true net migration* since it includes new olim in the immigration category. The figure highlights the dramatic fluctuations in Israel's net migration over the last five years: from a net gain of 23,566 in 2021, to 56,947 in 2022, 16,279 in 2023, to net losses of 26,276 in 2024, and a projected 37,115 in 2025. Assuming that emigration continues to remain high into 2026 — as implied by the ARMA-based projection shown in Figure 9 — Israel will experience a third consecutive year of negative net migration in 2026.

Figure 13. Israel's true net migration

Thousands



Notes: The true net migration includes olim as immigrants. Data for 2025 are annualized.

Source: Alex Weinreb, Taub Center | Data: CBS

This ongoing negative net migration will pull down Israel's overall population growth rates. Figure 7 implies that the natural growth rate in 2025 and 2026 will be around 1.3%. A net loss of some 37,000 people will pull down the overall population growth rate in 2025 to 0.9%. That is less than half of the average annual growth rate in the decade preceding COVID. It is a major transformation in Israel's demographic regime.

Where do Israelis go?

To interpret the increase in the number of native-born Israelis leaving Israel in 2023–2025, we need to look at prior migration patterns of Israelis. This is difficult to do with Israeli data because the CBS does not publish data on where Israeli citizens live overseas, nor does it publish data on Israeli citizens' circular migration patterns, though these could be estimated quite easily using information on individuals' arrivals and exits.

To gain some perspective, we draw on data from other countries. Direct counts of the number of Israel-born residents — though not Israeli citizens born elsewhere — can be found in data on "Stocks of foreign-born population" in other countries' population registers or censuses. Where censuses are used, intercensal estimates can be extrapolated from large-scale nationally representative survey data (e.g., Labor Force Surveys or the US Current Population Survey).

By definition, these measures of the *stock* of people who live outside their birth country in any given year is the sum of all the *flows* from the birth country over time minus anyone who has died or returned to their birth country. Here, we use those data in two ways. First, we estimate the percentage of Israel-born citizens who live outside Israel and look at shifts in that share over a three-decade period. We also compare Israel on these measure to other countries. This is important given the transformation of global migration patterns over the last few decades. Second, to get a sense of change in Israeli emigration patterns, we look at year-on-year shifts in the number of people born in Israel recorded as living in European countries and anglophone countries worldwide.

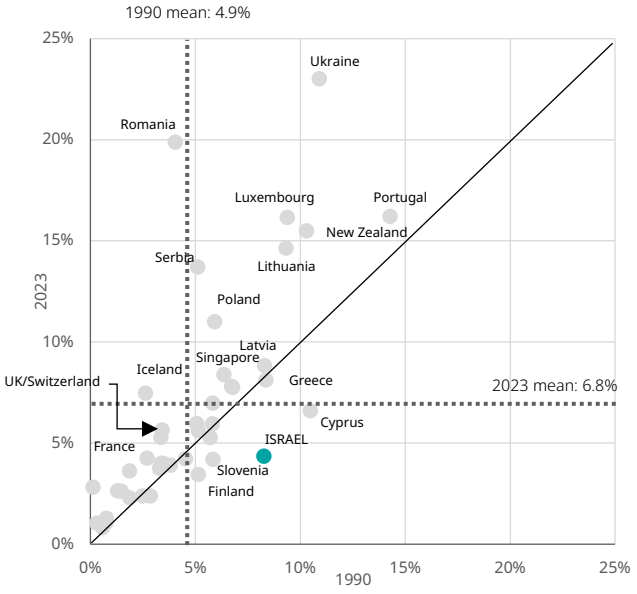
The percentage living outside their country of birth

The UN Department of Economic and Social Affairs (DESA) collates data on country of birth and country of residence into discrete tables covering: (1) the total number of immigrants, which it defines as people not born in the country in which they are a resident; and (2) the total number of emigrants, which it defines as people born in a given country that now live in another country. Here we use these estimates from 1990 and 2023. In each of these years, we calculate the share of native-born who are living outside the country.[15] To look at the country-specific change in the stock of migrants across that 33-year period — from which we can partly infer shifts in the flow — we graph these on a scatterplot, seen in Figure 14. The horizontal axis is the percentage of native-born living in another country in 1990. Across these countries, that mean percentage, indexed by the dashed vertical line, was 4.9%. The vertical axis is the percentage of native-born living in another country in 2023. Across these countries, the mean had risen to 6.8% (the dashed horizontal line).

The diagonal line is where a country would fall if the same percentage of native-born were living outside the country in both periods. Given the increase in the mean, it is not surprising that most countries are above that line. In most, the increase was no more than a couple of percentage points. Yet some — a cluster in Eastern Europe and some small states like Luxembourg, Iceland, and New Zealand — experienced an increase of more than 5 percentage points over these decades in the share of their native-born who reside outside the country.

15 For any given country in year t, the share of native-born living overseas is: $E/(P+E-I)$, where E is the total stock of emigrants, P is the total population, and I is the total stock of (foreign-born) immigrants who are resident in the country, all measured at time t.

Figure 14. Percentage of the native-born population living overseas, 1990 and 2023



Notes: Sample comprises 42 OECD and other European countries. The dotted lines represent the median value in each year.

Source: Alex Weinreb, Taub Center | Data: Immigration data from DESA/Our World in Data; Population data from UN Population Prospects

Israel is at the other end of the continuum. It is one of only four countries in this sample — the others are Finland, Slovenia, and Cyprus — that experienced a significant reduction in the percentage of people born in the country who now live elsewhere. In fact, Israel's reduction — from 8.3% of all Israel-born living outside Israel in 1990 to only 4.3% in 2024 — was the largest drop in this share (Cyprus was a close second). This is consistent with Israel's generally low outmigration rates shown in Figure 10. It suggests that Israel has actually been more successful at retaining its native-born over the last three decades — or having them return after a sojourn overseas — than it was in the prior decades. That is in spite of the frequent and aggressive belittling of Israeli emigrants (*yordim*, literally,

citizens who *go down* from Israel, but implicitly more about *abandoning* Israel) in those earlier decades. In the 1970s, Yitzhak Rabin famously referred to them as "moral lepers," "the fallen among the weaklings," and the "dregs of the earth" (Gold, 2004).

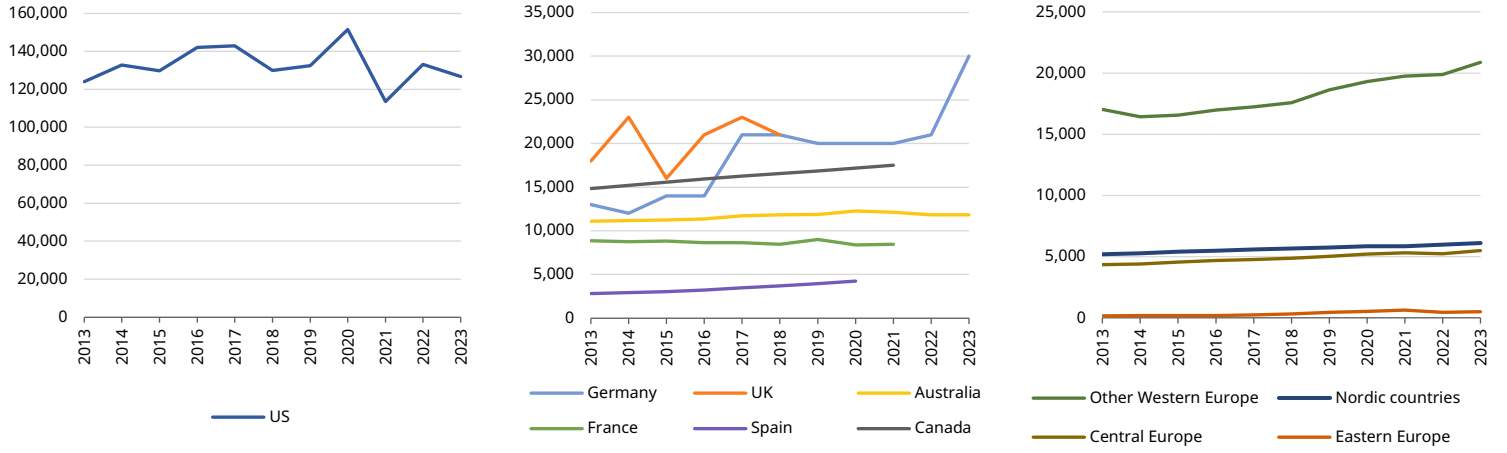
Where do Israel-born emigrants live?

Here we draw on data from the International Migration Database's stocks of foreign-born population, supplementing those with country-specific data for Canada. Figure 15 presents these data from the 2013–2023 period. They include data from all OECD countries with the exception of Costa Rica, Japan, South Korea, Poland, and Portugal.[16]

Given the high number of Israelis leaving in the 2015–2019 period, shown in Figure 12, we would expect to see a steady rise in the number of Israel-born residents abroad, with a noticeable increase in 2023. To some extent, this can be seen in Figure 15. Among countries with data in all years, the number of resident Israelis increased by 11.1% over the 10-year period. This confirms that there has been ongoing net movement of native-born Israelis overseas, even if it has grown slower than Israel's own population in the same period (21.9%) — this gap is consistent with the falling share of Israel-born living abroad, shown in Figure 14.

16 Some press reports claim that large numbers of Israelis have settled in non-OECD countries. Notable examples are Cyprus and Thailand (Kan, 2024, 2025; Zehavi, 2025). Thus far, these are not reflected in data reported by those countries' national statistical offices or in data reported by international organizations. However, informal estimates for Cyprus appear consistent with these reports, pointing to around 15,000 resident Israelis and Jews in Cyprus, with 400–500 families moving to Cyprus every year, though many of these are also temporary relocations (ICCOC, 2025). Estimates for Thailand are much lower. Despite the large number of Israeli visitors to Thailand — roughly 280,000 entries in 2024 — and a rise in war-related temporary relocations, the Israeli embassy in Bangkok estimates between 5,000–10,000 Israeli residents in Thailand, though legal impediments mean that the majority of these do not have long-term residence rights (Aharoni, 2025; Sadeh 2025).

Figure 15. The number of Israel-born residents of OECD countries, 2013–2023



Notes: Canada estimates for 2013–2015 and 2017–2020 are interpolated from Census values in 2011, 2016 and 2021. In the right-hand panel, "Other Western Europe" comprises Belgium, Italy, The Netherlands, Switzerland, and Luxembourg; "Nordic countries" comprises Denmark, Sweden, Norway, Finland, and Iceland; "Central Europe" comprises Austria, Czechia, Hungary, and Slovakia; "Eastern Europe" comprises the Baltic republics and Slovenia. No data are available for Japan, South Korea, Poland, or Portugal, and only partial data are available for other OECD countries, including Greece.

Source: Alex Weinreb | Data: Canada: www.statcan.gc.ca; all other countries, International Migration Database stocks of foreign-born population

More interesting is where these increases occurred. Across the 2013–2020 period, the number of Israel-born residents in the US — home to more native-born Israelis than live in all other foreign countries combined — increased by 25,000. However, the number of Israel-born US residents then fell substantially during COVID and only returned to its 2013 levels in 2023. Trends have also been relatively flat in Australia and, within the shorter time-series of available data, in France and the UK, the countries with the largest Jewish communities in Europe.

In fact, the biggest story in these data is the growth of the Israel-born population outside the US and the other major Jewish population centers. Germany is the stand-out case among countries with data (Cyprus, covered in footnote 16, is another). The Israel-born population in Germany climbed from around 13,000 in 2013 to around 21,000 in 2022. That is an annualized growth rate of 5.3%. It then leapt by 9,000 people in 2023 alone.

In absolute terms, Canada and a small group of (continental) Western European countries come next. All experienced slow and steady increases across the 10-year period (extrapolated in Canada from census data in 2011, 2016, and 2021), equivalent to around 2.0% per year. In the Western European bloc, this growth is driven by trends in The Netherlands and Switzerland — trends in Italy and Belgium were, like in France, flat.

In percentage terms, growth was higher in Central European countries (comprising Austria, Czechia, Hungary, and Slovakia) — 2.4% per year — though the low baseline meant the absolute effect was minimal. The number of Israel-born residents of Nordic countries changed the least over the 10-year period.

This increasing diversification in Israeli emigrants' destination is important for two main reasons. First, as others have noted (Staetsky, 2025), Israelis are restocking smaller Jewish communities outside Israel. This points to an intriguing recasting of Israel's role in Jewish communities globally that has potentially important implications. Specifically, the movement of more Israelis out of Israel may signal Israel's emergence as a metropole in the global Jewish community: a source of people and new forms of cultural capital in communities that have been aging and shrinking, and, without this influx, would be unsustainable in the long-term.

Second, the increasing diversification in Israeli emigrants' destination is also relevant to the education-migration debate, that is, to the idea that Israel is

losing its best and brightest. A longstanding and empirically robust assertion in research on migration is that the most skilled migrants head to economies that give the highest returns to those skills. For Israeli migrants historically, those have been anglophone countries with higher levels of income inequality, especially the US (Cohen, 2009). Less skilled Israelis, in contrast, have tended to migrate to countries with less income inequality and stronger welfare systems: Scandinavia ranks highest in this regard, and continental Europe just a little lower. Looking at Israelis' migratory destinations at the population level, in other words, tells us something about migrants' skills and motives — the two characteristics are related.

This shift in Israelis' destinations over the last decade suggests that emigrants' selection on education, i.e., that the emigrants tend to be highly educated, is becoming less pronounced. Clearly, this assertion needs to be tested much more rigorously before we can say whether that is the case with real confidence. That said, this implied attenuation of a narrowly focused economic motivation for migration is consistent with a recent survey of Israelis' migration intentions fielded by the Israel Democracy Institute. It showed that reported motives are related more strongly to lifestyle and political factors than to traditional economic concerns (Yohanani et al., 2025).

Summarizing migration

More Israelis have left Israel over the last few years than ever before. While most of those are not native-born Israelis, and roughly a third are not Jewish, native-born Israelis have also been leaving in increasingly large numbers. By international standards, that emigration rate remains low but it is high by Israeli standards.

That emigration is a loss, at least in the short-term, though it may have networking benefits in the long term. Whether it becomes a loss in the long-term depends, primarily, on how many of those leavers return, and what their skill sets are relative to what they were at the time of leaving. That is also a key finding in the scholarly literature on migration. The international migration of skilled workers can augment local capital by providing access to higher level skills, better networks, and more capital. Back-and-forth movements of this kind have allowed Israeli academia to maintain its high quality.

They also at least partly explain Israel's top-ranking in the 2025 Global Innovation index — first in VC funds received and, subsequently in overall research and development (R&D) expenditure, university-industry R&D collaboration, and R&D performed by business.

Thus far, the increase in the number of people leaving Israel since 2023 has not led to an increase in the number of returning Israelis. But, in all fairness, it is too early to expect an uptick in returns. Assuming that some of the outmigration was related to the war, returns that began at the earliest in November 2025 will only become visible in CBS data on long-term migration in August 2026 (275 days after people's entry into the country). Given that families tend to migrate during the summer months, data on returning Israelis will not be fully clear until April 2027.

At the same time, other changes are afoot internationally that could affect Israelis' migration patterns. In recognition of high levels of outmigration in this *era of migration*, an increasing number of high-income countries have enacted "Emigrant return policies" (ERPs) (Bruzelius & Reiss, 2025) that both build on and, in some cases are a response to, longstanding policies designed to attract skilled people from wherever, Israelis among them (Brücker et al., 2012; Czaika & Parsons, 2017). The ability of some to work virtually, in combination with much lower housing costs than in Israel, may provide an extra incentive for some Israelis to relocate, especially to close countries with easy flight connections. This "lifestyle migration" may explain a large part of the rapidly rising Israeli populations in European countries, notably Germany and Cyprus.[17]

On the other hand, many potential destinations are becoming less attractive. One reason is the rise in antisemitic incidents in almost every high-income country with a Jewish community — a bloc of Central European countries, notably Hungary and Czechia, are exceptions. That rise has embittered the experience for Jews in general, and perhaps especially for Jewish Israelis, who are less inured to such phenomena. It is inaccurate to see this only as a post-October 2023 phenomenon. As we document in a forthcoming paper, incidents have been climbing almost everywhere for the last 20 years. The post-October 2023 surge is merely the latest and most serious.

17 Y. Harpaz, personal communication, November 2025.

A final reason that emigration may become less attractive for Israelis is that many countries, in Europe in particular, are facing economic and political uncertainties associated with aging, fiscal crises, rising debt, and even falling credit ratings that are pushing up the cost of borrowing and creating inflationary pressure. Alongside the growth in nativist political parties that are not only anti-immigration but also often have somewhat ambivalent attitudes to their small Jewish minorities, these factors may make countries both less attractive to Israelis and to existing Jewish communities.

In summary, just because Israel has long enjoyed net positive migration does not mean that those positive rates will continue in an era in which "a good life" is seen to be too expensive in Israel (for poorer Israelis who lack family wealth or migrants with less capital), and where there are notable inequalities in civic obligations alongside societal divisions. On the other hand, just because Israelis have become used to being able to move to places where they can freely and openly identify as Israeli does not mean that they will continue to be able to do so.

In either case, it would be good if Israeli policy makers could consider extending the relatively effective "managed migration framework" that it applies to incoming migrants — special programs for particular types of olim and comprehensive bilateral agreements for labor migrants in agriculture, construction, and care — to returning Israeli emigrants. A recent Knesset report reviewing comparative *Policies to Attract Highly Skilled Migrants* shows some potential move in this direction (Kfir Oren, 2025). It would also be especially useful if Israel's CBS could make available individual-level data on migrants: those who have left and those who have returned. Only with those types of data can we give more unambiguous answers to critical questions about contemporary migration patterns: the characteristics of those who move and return.

Conclusions

Over the last couple of years, Israel has entered a new period in its demographic development. This is expressing itself in two ways. First, Israel has passed its peak period of natural growth. The coming decades will see those natural growth rates fall towards 1.0% per year as large cohorts age into their 70s and 80s, raising the number of deaths in any given year relative to the number of births. Of course, the number of births will also continue to rise in the foreseeable future, at least in the Jewish population. However, as fertility rates continue to fall, any increase in the absolute number of births will increasingly be driven by *population momentum* — that is, by the rising number of women entering reproductive age. Eventually, that effect will also slow.

Second, Israel has entered a period of negative net migration even when we consider the *true net migration rate*, that is, when we include olim in the flow of immigrants. This is a marked break from past patterns. Israel has long experienced negative net migration when it ignores olim in the entry side of the demographic ledger but not in the exit side — the typical net migration that appears in CBS tables (since the leavers are *Israeli* when they exit the country). However, negative true net migration rate is unusual. To experience it two years running and, based on our projections, for three consecutive years, is unprecedented. It means that Israel's growth rate of 0.9% in 2025 is not a one-off.

In itself, this reduction in demographic growth is not necessarily bad. It may reduce pressure on the real estate market — indeed, it may already have contributed to the recent reduction in housing prices — and have some other Malthusian benefits. However, any final judgment of this attenuated growth can only happen after we know more about the relative characteristics of who is leaving Israel, who has remained, and who is moving to Israel. Without that information, any claims about net gain and loss will only be partial and, therefore, more about rhetorical spin than empirical substance.

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Appendix

ARMA model for predicting net migration from Israelis' total entries and exits

We smooth the variables on entries and exits over a 2-month period to remove some of the major wartime fluctuations. We also build in a month-long lag to account for the later return of Israelis leaving for a vacation or work trip. The specific variable capturing net entries/exits is:

$$Entries(month_m + month_{m+1}) - Exits(month_{m-1} + month_m)$$

Consistent with intuition, a positive value points to more entries than exits into Israel and a negative value to more net exits.

The ARMA models take the form:

$$Y_m = \beta_0 + \beta_1 X_{m-n} + \varphi Y_{m-1} + \epsilon_m + \theta \epsilon_{m-1}$$

where Y is the official CBS measure of net emigration covering 32 months from January 2023 until August 2025; X is the monthly net exit measure described above, covering September 2021 to August 2025; subscript m indexes the month, subscript n an unspecified number of months (intentionally varied across the series of models), and ε_m is a standard error term.

The other two terms get to the heart of the ARMA model advantage over standard lagged regression.[18] φ is an autoregressive coefficient that captures the persistence of trends (positive or negative) in Y in consecutive months, meaning that if $\theta > 0$ and last month's net exits were high, this month's exits will also tend to be; θ is a moving average coefficient that captures very short-term shocks, so a surprise last month will also influence this month's value.

18 All steps taken here were replicated using lagged linear regression. It identified the same general trends as the ARMA model, but model fit statistics of model-based predictions (described below) fell short of the ARMA. We therefore do not discuss the lagged regression.

We estimate a series of these models varying the lag between net exits and subsequent net migration from 8 to 13 months. Note that because this variable is smoothed over a 2-month period and contains a one-month lag for returns, the 8–13 month lag refers to the final return date: it is actually a 10–15 month range from the first exit month in the predictor variable.

Wald χ^2 tests confirm that the best-fitting lag between net exits and net emigration is 11 months (meaning 13 months from the first exit month). The specific χ^2 scores were all below 16 where the lag is less than 10 months, surged to 265 with an 11-month lag, then dropped to 40 where the lag was 12 months, and dropped further for longer lags.