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Report Name: Grain and Feed Semi-Annual

Country: Saudi Arabia

Post: Riyadh

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Report Highlights:

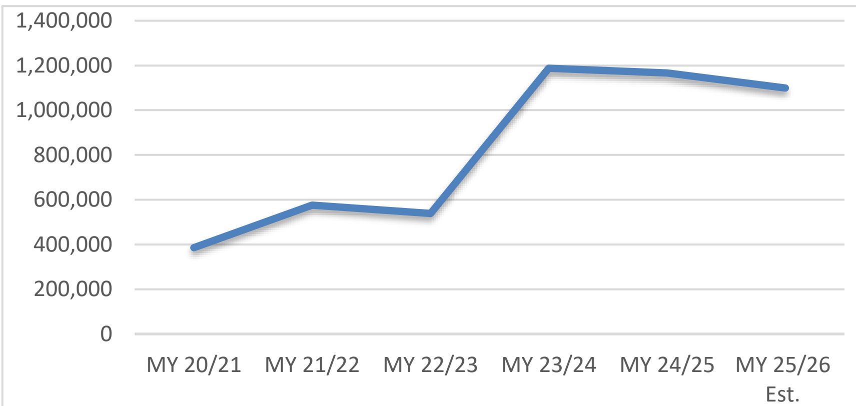
Total Saudi wheat imports for 2025/26 are forecast to decline 10 percent to 3.1 million metric tons (MMT). Local production is expected to reach 1.1 MMT. Saudi barley imports for MY2025/26 are projected to increase by 4 percent to 4 MMT. MY2025/26 total corn imports are projected to reach 4.9 MMT, from a record 4.74 MMT in MY2024/25. As per rice trade sources, in MY 2025 Saudi imported the total of 1.1 MMT of rice and U.S. rice exports to Saudi Arabia from January through July 2025 totaled 68,269 MT, an increase of 28 percent from 53,437 MT imported in the same period last year.

Wheat.

Domestic Wheat Production Overview:

The General Food Security Authority (GFSA) remains the exclusive purchaser of both domestically grown and imported wheat in Saudi Arabia. For Marketing Year (MY) 2025/2026 (July–June 30), GFSA forecasts domestic production at 1.1 million metric tons (MMT), operating under a government mandate to purchase up to 1.5 MMT of local crop annually. To meet this target, the Ministry of Environment, Water, and Agriculture (MEWA) has incentivized production with a procurement price of 1,750 SAR ($467) per metric ton. This pricing strategy aims to shift the farmer's focus away from water intensive alfalfa hay, which has historically offered higher profitability. The cultivated area for the current harvest is estimated at 183,000 hectares, with an average yield of 6 MT per hectare.

Graph 1. Saudi Wheat Production in MT for MY 20/21-MY 25/26



Source: GFSA.

Domestic Wheat Consumption:

For Marketing Year (MY) 2025/26, domestic wheat consumption is forecast at 4.6 MMT, with a projected annual growth rate of 3–4 percent. This upward trend is driven by three key factors: rapid population growth, the expansion of the migrant labor force supporting Saudi Vision 2030 infrastructure projects, and a booming tourism sector. As the Kingdom scales its leisure and hospitality industries, demand from the food service sector—particularly for bakery products—is expected to accelerate significantly over the coming years.

Trade:

GFSA does not have a memorandum of understanding (MOU) with any grain-supplying country. Its purchasing decisions are based on suppliers meeting their import quality specifications at a competitive price. Following a robust import program in MY 2024/25 that totaled 3.4 MMT, Saudi Arabia's procurement for the 2025/26 marketing year is well underway. As of this writing, the GFSA has already secured 2.051 MMT for delivery through April 2026, locking in an average price of $262.30 per MT. Suppliers are a wide mix but are dominated by Black Sea origins. Russia leads as the primary exporter, followed by Romania, Brazil, Uruguay, and Bulgaria, respectively.

Table 1. GFSA Wheat Import Tenders for Marketing Years (MY2024-MY25/26) - Quantity in MT with 12.5% protein:

GFSA Contract number	GFSA Wheat Purchase Tenders for MY 24/25			Tenders for MY 25/26 (Available data until report was issued)			
	Shipment Arrival Date	MT	Price$	Cont. #	Shipment Arrival Date	MT	Price $
76	July 2024	363,000	256.4	83	July-Dec 2025	475,000	265.88
77	Aug-Dec 2024	415,000	285.13	84	Aug-Oct 2025	621,000	251.7
78	Sep-Oct 2024	235,000	263.35	85	Dec 2025- Jan 2026	455,000	263.68
79	Dec24-Jan 25	307,000	265.78	86	Jan 2026 – April 2026	500,000	268.12
80	Jan-March 2025	360,000	290.71				
81	Feb April 2025	804,000	268.87				
82	May-June 2025	920,000	276.37				
Total		**3,404,000**	**Average Price 272.3**	**Total**		**2,051,000**	**Average Price 262.3**

Source: GFSA

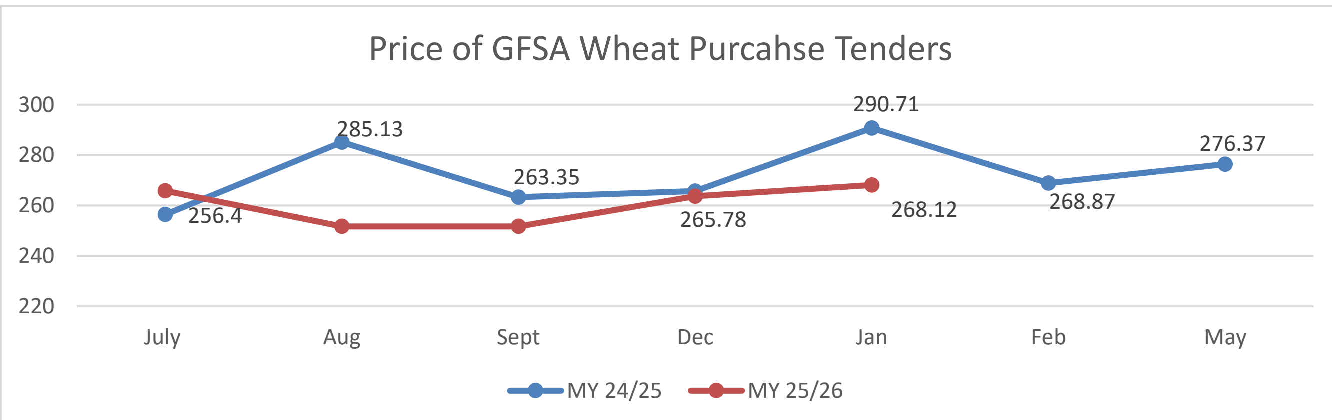


Table 2. Saudi Wheat Imports in MT

Saudi Arabia Imports from _World Product Group: PSD-Wheat; Unit: WGE. Year Ending Plus Series			
Exporter	**Rank**	**Year Ending (UOM1: WGE)**	
		MY 24/25	**MY 25/26**
Russia	1	1,462,000	752,000
Romania	2	914,131	334,004
Brazil	3	0	199,136
Uruguay	4	0	187,383
Bulgaria	5	917	131,796

Source: TDM and industry sources

Saudi Wheat Production, Supply and Distribution (PSD) Table

Wheat	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jul 2023		Jul 2024		Jul 2025	
Saudi Arabia	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	200	200	200	200	250	183
Beginning Stocks (1000 MT)	3504	3504	4012	4012	3662	3924
Production (1000 MT)	1200	1200	1200	1200	1500	1100
MY Imports (1000 MT)	3890	3890	3100	3402	3300	3100
TY Imports (1000 MT)	3890	3890	3100	3402	3300	3100
TY Imp. from U.S. (1000 MT)	4	0	3	4	0	0
Total Supply (1000 MT)	8594	8594	8312	8614	8462	8124
MY Exports (1000 MT)	132	132	150	150	250	250
TY Exports (1000 MT)	132	132	150	150	250	250
Feed and Residual (1000 MT)	0	0	0	0	0	0
FSI Consumption (1000 MT)	4450	4450	4500	4540	4650	4630
Total Consumption (1000 MT)	4450	4450	4500	4540	4650	4630
Ending Stocks (1000 MT)	4012	4012	3662	3924	3562	3244
Total Distribution (1000 MT)	8594	8594	8312	8614	8462	8124
Yield (MT/HA)	6	6	6	6	6	6.0109

(1000 HA), (1000 MT), (MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Wheat begins in July for all countries. TY 2025/2026 = July 2025 - June 2026

OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query

Barley

Domestic Barley Production:

Saudi barley production area is estimated at approximately 2000 HA and produces 4000 MT and for human consumption only and to be used in traditional Saudi dishes specially during Ramadan. Market survey indicates an average price of 1 kilogram of barley is around $1.80.

In Saudi, barley is farmed mainly in Taif, Najran, Qassim, and Asir regains. Farming starts in the beginning of wintertime which starts in November-December through January in some regions. The cultivating season starts in April and lasts until mid-May. There is no barley production for feed in the Kingdom. Because barley is a water intensive crop, MEWA is encouraging farmers to switch to wheat which is more important for their food security.

Consumption:

Traditionally, farmers mix barley with alfalfa to feed their livestock which includes cuttle, sheep, camels, and horses. However, domestic feed barley and hay prices have been rising in recent months to reach an average of 62.8 SAR per 50 Kilo bag, making the feed combination more costly than processed animal feed which has an average cost of 40 SAR. Furthermore, the barley/alfalfa feed mix will get more expensive when local alfalfa production is terminated in 2027. The recent decline in barley consumption can be attributed to the following factors:

1) Local farmers have been educated about the cost-saving benefits of processed feed.
2) Increased distribution of processed feed which included corn, soyabean, and additives.
3) Alfalfa–barley mix feed has been more expensive than processed feed.

Table 3. Local feed barley prices compared with Alfalafa:

	Feed Barley and / kind	KG	Average Price SAR	Feed Kind
1	Wafeer Barley	50	61	Barley
2	Wafeer Barley grounded	50	65	Barley
3	Compressed Barley	50	64	Barley
4	Wafi Barley	50	63	Barley
5	Compressed Barley (Amico)	50	62	Barley
6	Barley Square	50	62	Barley
7	Alfalfa Square	15 kg	32	Alfalfa (2.1 per kilo) 106.7 per 50 Kilos.

Source: FAS Riyadh

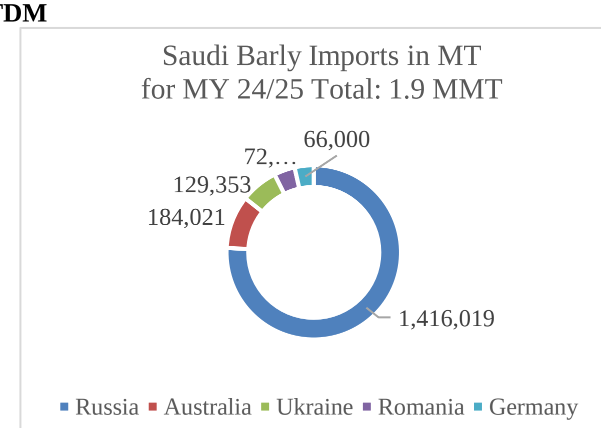
Post and industry sources estimate domestic consumption for MY2025/26 at 3.7 MMT, an increase of 20.9 percent over MY2024/25 total consumption which was 3 MMT.

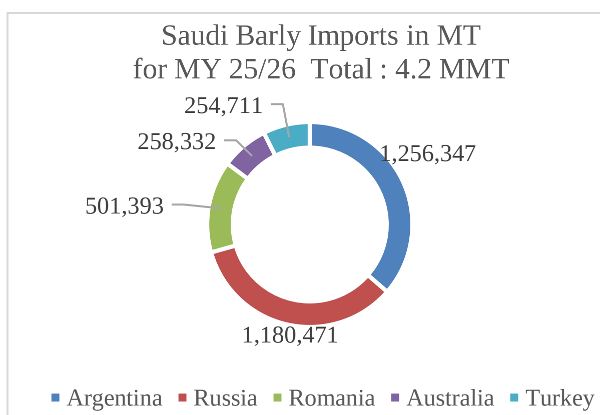
Trade:

Imported barley in Saudi Arabia is used exclusively for animal feed, and a small quantity is used for brewing nonalcoholic beer. The increase in global barley supply has led to lower international prices, which, in turn, have stimulated barley demand in Saudi Arabia and opportunistic purchasing. Demand has also risen because MEWA and GFSA have announced new livestock projects aimed at strengthening food security, partly to rebuild the country's barley stocks. An additional driver is increased demand from feed processors, who incorporate barley into livestock feed formulations when its price becomes more favorable than that of yellow corn. According to customs data, Saudi total barley imports for MY 2025/26 reached 4.2 MMT. The figures below show the top barley exporters to Saudi Arabia:

Saudi Arabia Imports from World.				
Commodity: 1003, Barley, Year Ending Plus Series. Unit: MT				
Partner Country	Rank	Year Ending (UOM1: T)		
		2023	2024	2025
World		2,572,802	1,921,869	4,207,710
EU 27		863,927	167,353	1,150,576
Argentina	1	0	0	1,256,347
Russia	2	358,235	1,416,019	1,180,471
Romania	3	149,498	72402	501,393
Australia	4	132,8775	184,021	258,332
Turkey	5	0	0	254,711

Source: TDM





Source: TDM

Saudi Barley Production, Supply and Distribution (PSD) Table

Barley	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jul 2023		Jul 2024		Jul 2025	
Saudi Arabia	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	2	2	2	2	2	2
Beginning Stocks (1000 MT)	980	980	967	933	954	920
Production (1000 MT)	12	12	12	12	12	12
MY Imports (1000 MT)	2000	2466	4000	3000	3800	3700
TY Imports (1000 MT)	2600	2000	3500	2200	3900	3700
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	2992	3458	4979	3945	4766	4632
MY Exports (1000 MT)	0	0	0	0	0	0
TY Exports (1000 MT)	0	0	0	0	0	0
Feed and Residual (1000 MT)	2000	2500	4000	3000	3800	3700
FSI Consumption (1000 MT)	25	25	25	25	25	25
Total Consumption (1000 MT)	2025	2525	4025	3025	3825	3725
Ending Stocks (1000 MT)	967	933	954	920	941	907
Total Distribution (1000 MT)	2992	3458	4979	3945	4766	4632
Yield (MT/HA)	6	6	6	6	6	6

(1000 HA), (1000 MT), (MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Barley begins in October for all countries. TY 2025/2026 = October 2025 - September 2026

Corn

Domestic Corn Production

Approximately 135,000 MT of corn is produced annually for human consumption in the southwest region mainly in Jizan, and Asir.

Domestic Corn Consumption:

Imported corn is primarily used for animal feed. Approximately 250,000 MT is used in the production of food processing ingredients, such as starch and sweeteners. Domestically grown corn is used as corn-on-the-cob or milled into flour by small neighborhood flour mills.

Corn is a very important feed grain for poultry and accounts for approximately 60 percent of poultry feed formulations. Compared to other feed options, local feed processors often switch corn in and out of operations based on price. Local feed processors can easily replace corn with barley if its prices are less competitive and increase its use in their feed processing when prices are competitive.

Post projects corn consumption will continue to increase over the next several years as Saudi Arabia strives to achieve self-sufficiency in poultry production, along with growing use in aquaculture, dairy, and the livestock sectors. Currently, the country is 80 percent self-sufficient in chicken meat.

Trade:

Corn demand in Saudi Arabia is projected to remain strong, supported by the continued expansion of domestic poultry operations and feed processors. Imports from Latin and North America continue to dominate the market due to competitive pricing and consistent quality, especially from the U.S.

In MY 2024/25 (Oct–Sep), Imports totaled nearly 3 MMT and rose to 4.7 MMT in MY 2025/26, driven by high global supply, lower prices, and sustained growth in the poultry and livestock sectors. Industry sources report that favorable prices and increased availability further boosted demand.

Saudi Arabia Imports from World Product Group: BICO-Corn.					
Partner Country	**Rank**	**Unit**	**Year Ending (UOM1: T)**		
			2023	**2024**	**2025**
World		T	3,354,159	2,912,348	4,507,724
EU 27		T	9,283	63,161	11,848
Argentina	1	T	1,656,854	1,137,748	2,557,917
Brazil	2	T	1,158,655	1,200,121	1,467,034
United States	3	T	324,177	411,999	403,718
Ukraine	4	T	61,734	67,445	56,351
Spain	5	T	8,779	1,728	11,797

Source: TDM

Saudi Corn Production, Supply and Distribution (PSD) Table:

Corn	**2023/2024**		**2024/2025**		**2025/2026**	
Market Year Begins	**Oct 2023**		**Oct 2024**		**Oct 2025**	
Saudi Arabia	**USDA Official**	**New Post**	**USDA Official**	**New Post**	**USDA Official**	**New Post**
Area Harvested (1000 HA)	31	31	31	31	31	31
Beginning Stocks (1000 MT)	415	415	439	1295	431	980
Production (1000 MT)	135	135	135	135	135	135
MY Imports (1000 MT)	4989	4995	4357	4500	4500	4700
TY Imports (1000 MT)	4989	4955	4357	4500	4500	4700
TY Imp. from U.S. (1000 MT)	869	869	0	0	0	0
Total Supply (1000 MT)	5539	5545	4931	5930	5066	5815
MY Exports (1000 MT)	0	0	0	0	0	0
TY Exports (1000 MT)	0	0	0	0	0	0
Feed and Residual (1000 MT)	4900	4000	4300	4700	4450	4500
FSI Consumption (1000 MT)	200	250	200	250	200	250
Total Consumption (1000 MT)	5100	4250	4500	4950	4650	4750
Ending Stocks (1000 MT)	439	1295	431	980	416	1065
Total Distribution (1000 MT)	5539	5545	4931	5930	5066	5815
Yield (MT/HA)	4.3548	4.3548	4.3548	4.3548	4.3548	4.3548
(1000 HA) ,(1000 MT) ,(MT/HA) MY = Marketing Year, begins with the month listed at the top of each column TY = Trade Year, which for Corn begins in October for all countries. TY 2025/2026 = October 2025 - September 2026						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Rice:

Domestic Rice Production:

According to MEWA, the annual average rice production in Al-Hasa city is around 500 MT. There are three types of Hasawi rice available in the local market: local Hasawi rice, Haswai No. 1, and Hasawi No. 2, the latter two referred to as "hybrid". The rice farming season begins in July, and cultivation starts in December.

Domestic Rice Consumption:

In Saudi, Rice is used in many daily dishes depending on the dish and consumers preferences, many kinds of rice are imported in Saudi like:

- **Basmati Rice:** A long-grain, aromatic rice that is a staple in Saudi cuisine and integral to traditional dishes like Kabsa and Mandi.
- **Other long-grain rice:** This includes a wide variety of rice that falls under the long-grain category.
- **Parboiled:** Saudi Arabia imports it as well to meet consumer needs.

Saudi Top Rice suppliers:

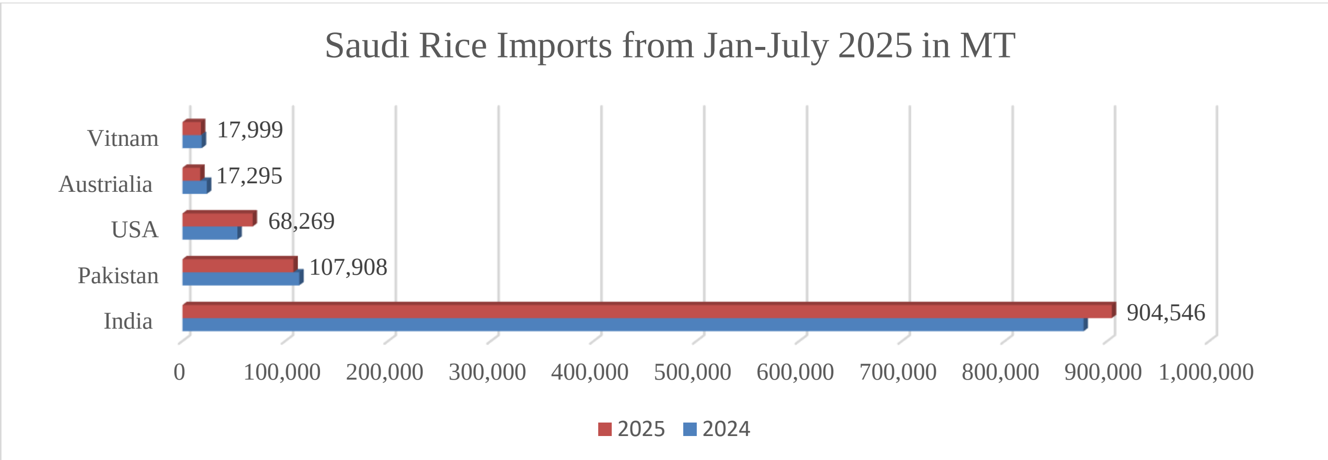
- **India:** The largest supplier, especially of Basmati rice, which is renowned for its quality. The average selling price of 5 kilos bag is 46.3 SAR.
- **Pakistan:** A significant exporter of Basmati rice to Saudi Arabia and the average price of 40 SAR for 5 kilos bag
- **United States:** A key source for short, medium grain, and Calrose rice. With an average selling price of 47.6 SAR per 5 Kilos bag.
- **Australia:** Another major supplier of rice to the Saudi market. With an average price of 38 SAR for 5 kilos bag
- **Thailand:** A growing source for rice imports. 33.5 is the average price for 5 Kilos bag.

Picture1. Rice shelf. Source: FAS Riyadh

As per industry sources, stable demand from end consumers but might see a 2 percent increase because of low prices and promotional activities by imported brands as well as the GFSA collaboration with importers.

Trade:

Total Saudi rice imports for January- July 2025 increased by 3 percent to 1,150,108 MT compared to the same period last year. The increase can be attributed to GFSA's partnership with major rice importers to ensure adequate rice reserves are held in importers' warehouses and to the current favorable prices. Additional drivers of imports are an increase in tourists visiting Saudi Arabia who want to try traditional dishes with rice as a main ingredient, and the ongoing construction boom, which has increased the migrant labor force. According to the customs, total U.S. rice exports to Saudi Arabia for January – July 2025 reached 68,269 MT, an increase of 28 percent compared to 53,437 MT imported in the same period last year.



Source: TDM

Saudi Rice Production, Supply and Distribution (PSD) Table

Rice, Milled	**2023/2024**		**2024/2025**		**2025/2026**	
Market Year Begins	**Jan 2024**		**Jan 2025**		**Jan 2026**	
Saudi Arabia	**USDA Official**	**New Post**	**USDA Official**	**New Post**	**USDA Official**	**New Post**
Area Harvested (1000 HA)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	401	401	601	678	751	618
Milled Production (1000 MT)	0	0	0	0	0	0
Rough Production (1000 MT)	0	0	0	0	0	0
Milling Rate (.9999) (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	1775	1777	1850	1500	1850	1620
TY Imports (1000 MT)	1775	1777	1850	1500	1850	1620
TY Imp. from U.S. (1000 MT)	115	85	0	0	0	0
Total Supply (1000 MT)	2176	2178	2451	2178	2601	2238
MY Exports (1000 MT)	0	0	0	0	0	0
TY Exports (1000 MT)	0	0	0	0	0	0
Consumption and Residual (1000 MT)	1575	1500	1700	1560	1800	1630
Ending Stocks (1000 MT)	601	678	751	618	801	608
Total Distribution (1000 MT)	2176	2178	2451	2178	2601	2238
Yield (Rough) (MT/HA)	0	0	0	0	0	0

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Rice, Milled begins in January for all countries. TY 2025/2026 = January 2026 - December 2026

OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query

Attachments:

No Attachments