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Report Highlights:

Total Saudi Wheat imports for 2026/27 are forecasted to increase 2 percent to 3.5 million metric tons (MMT), due to projected higher local demand from the processing sector and increased strategic reserves. Saudi barley imports for marketing year (MY) 2026/27 are projected to increase by 2 percent to 4.5 MMT compared to current marketing year. Total corn imports in MY 2026/27 are projected to reach 4.66 MMT from 4.5 MMT in MY 2025/26. Total rice exports to Saudi Arabia this marketing year are estimated at 1.85 MMT based on steady population growth and the expanding food service sector.

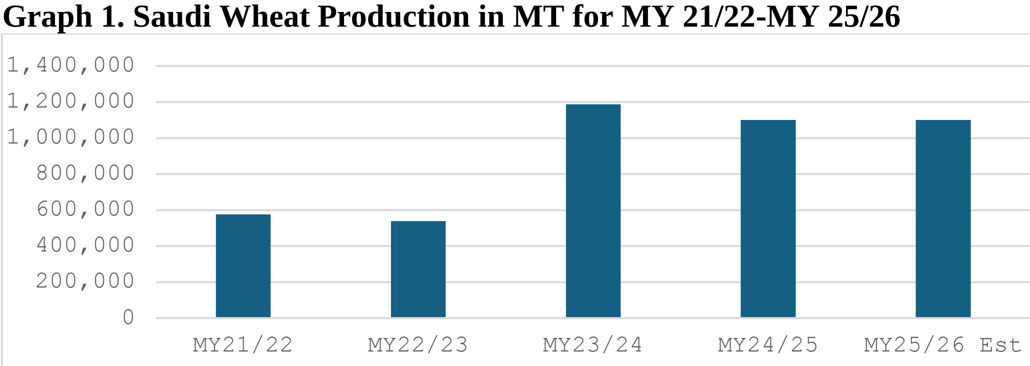
WHEAT

Production

Since MY 2019/2020, small farmers have voluntarily produced wheat in Saudi Arabia through a quota system established by the Saudi Ministry of Environment, Water, and Agriculture (MEWA). The domestic wheat production program is reviewed every five years. MEWA allows small farmers with land areas up to 50 hectares each crop year to plant wheat and sell it to the General Food Security Authority (GFSA) at a government-established purchase price (GPP), which may change each MY. In 2024, the Saudi government renewed its domestic wheat production and purchasing programs for another five years, allowing up to 5,000 small farmers to produce a maximum of 1.5 million metric tons (MT) per year. MEWA may keep the maximum local production quota at 1.5 million metric tons (MMT) or reduce or increase depending on the underground aquifer and the world wheat supply situation as needed. The government purchase prices for locally cultivated wheat have been profitable for farmers, motivating them to increase production to nearly 1.2 MMT. In MY 25/26 The government purchase price to remain close to the last MY level of $480 per MT.

In April 2024, MEWA imposed an immediate ban on alfalfa seed imports to the Kingdom and has scheduled a prohibition of domestic alfalfa production starting from the 2027/2028 production year. The ban on domestic alfalfa cultivation could significantly increase the Kingdom's domestic wheat production, as wheat requires less water than alfalfa cultivation. Small farmers producing alfalfa hay may petition MEWA to allow them to repurpose their land for wheat cultivation.

Graph 1. Saudi Wheat Production in MT for MY 21/22-MY 25/26



Source: GFSA

GFSA is the monopsony purchaser of domestically grown and imported wheat in Saudi Arabia. The authority estimated domestic wheat production at 1.1 MMT for MY 2025/2026 (July 2025–June 2026), Same as last year's production of 1.1 MMT. The wheat production area for this year's harvest season is estimated at 183,000 hectares (HA) with 6 MT per HA yield.

In Saudi Arabia, wheat is planted from the end of November through the second week of January and delivered to GFSA from June to October. Traditionally, Saudi Arabia grows a hard-winter variety known as "Yecoro Rojo," developed by the International Maize & Wheat Improvement Center in cooperation with the Mexican Ministry of Agriculture in Mexico. GFSA prefers Saudi

Arabian wheat over imported wheat due to its hard kernel and lower moisture content, allowing extended storage times.

Consumption

MY 2025/2026 total wheat consumption is projected at 4.6 MMT, up approximately 1.5 percent from the previous MY, and it is projected to show at least 2 percent growth in MY 2026/2027 and reach 4.7 MMT. Demand for wheat is projected to remain strong over the next few years due to an increased demand from the food service sector. Hundreds of labor camps, the main driving force in the food service sector, are being established throughout Saudi Arabia, coupled with more religious and tourist visitors, have already increased the demand for bread and other food ingredients used by the catering and food service sector.

According to GFSA, no wheat is used as animal feed in the Kingdom. All wheat, imported and produced locally, is used exclusively for human consumption. Feeding subsidized food wheat to livestock is illegal. Wheat is mainly consumed as flat (pita) bread or a local hamburger bun known as a "Samoli." Western-style bread, such as French baguettes and pizza, is also popular.

The annual per capita wheat consumption in Saudi Arabia (total population – 35.3 million) was estimated at approximately 129.43 kg in MY 2024/25. White flour constitutes the bulk of wheat flour consumed in Saudi Arabia. However, there has been a growing demand for whole-wheat flour in recent years due to its perceived health benefits, particularly by health-conscious consumers and those with health conditions such as diabetes and obesity. It should be noted that Saudi Arabia has one of the highest diabetic and obesity rates in the world. As a result, the four flour mills currently operating in the Kingdom have increased their whole-wheat production in recent years to meet growing demand.

Trade

In MY 2025/26 (July 2025 - June 2026), GFSA issued six international wheat import tenders and purchased 3.2 MMT, which are expected to arrive by the end of May 2026, the authority says that purchased wheat arrives by contractual agreements. GFSA's wheat imports policy hinges on meeting annual local demand and maintaining adequate strategic wheat reserve stocks. Total Saudi wheat imports for MY 2025/26 are forecast to increase to reach 3.5 MMT due to projected higher demand and increasing the wheat reserves. GSFA issued tenders specify among other requirements hard wheat with 12.5% protein content giving the seller of selecting the origin supplied among approved suppliers (the Americas, EU, Australia and Black Sea countries). As such, supplying countries will be known at the time of wheat shipments.

GFSA is the exclusive importer of subsidized food-grade wheat in Saudi Arabia. However, MEWA is working to hand this responsibility to the Saudi Agricultural and Livestock Investment Company (SALIC), the Public Investment Fund (PIF) agricultural arm owned by the Kingdom's sovereign wealth fund. SALIC is expected to take over the responsibilities of wheat purchasing, operating wheat storage silos, and the maintenance of strategic stocks in the next few months. There have also been some discussions that indicate the government's intentions to exit wheat import and hand it over to the private sector, particularly to The National Grain Supply Company, "SABIL" which is a SALIC Group subsidiary wholly owned by the Public Investment Fund (PIF). Such a move will perhaps make Saudi wheat flour export more competitive compared to mills in the GCC countries for several reasons, including (1) state-of-the-art milling equipment, (2) economies of scale in purchasing due to increased imports and cash payments, (3) cheaper energy cost, (4) strategic location of the mills which are located in the proximity to export ports such as the four Red Sea ports and one on the Arabian Gulf. The ports have good infrastructure that facilitates imports and exports.

GFSA imports hard wheat directly through public tenders open to registered international exporters. GFSA purchases wheat from various origins, including Australia, the EU, South America, the United States, Canada, Australia, and various Black Sea countries. Registered international wheat suppliers include Louis Dreyfus, Solaris, Cerealcom, Ameropa, Holbud Limited, Ameropa, Bunge, Cargill, Viterra, Cofco, Invivo Group, and Olam Agri Holding (Olam). Olam is owned 90 percent by SALIC.

Table 1. Saudi Wheat Imports in 1000 MT

Exporter	MY 2024/25	Market Share	MY 2025/26 (Available data until now)	Market Share
EU 27	1,462	48 %	1,189	48 %
Russia	1,151	38 %	1,044	42 %
Brazil	199	6.5 %	0	0 %
Ukraine	0	0 %	121	5.3 %
Other Countries	227	7.5 %	115	4.7 %
Total	**3,039**	**100%**	**2,469**	**100%**

Source: Trade Data Monitor and industry sources

GFSA issues two types of wheat import tenders:

1) International Wheat Market: GFSA issues import tenders to all international wheat suppliers to meet demand and sets a minimum protein level of 12.5 percent.
2) Exclusive Wheat Import Tender for Saudi Companies Farming in Foreign Countries: As the title indicates, this tender is only for Saudi Arabian companies operating farms in foreign countries.

It is anticipated SALIC will use one of its joint venture international grain groups (e.g., GB, G3 Global Grain Group, or Olam Agri Holdings) to supply increased wheat quantity to the Kingdom in the next few years.

GFSA Wheat Purchase Data

GFSA issued the following six international wheat import tenders for MY 2025/26 and purchased 3.258 MMT, which is expected to arrive by the end of June 2026. Total Saudi wheat imports for MY 2025/26 are forecasted to increase and reach to 3.507 MMT due to projected higher consumption, increasing wheat processors and exports of wheat-based products, and increasing its wheat reserves. In MY 2026/27, Saudi wheat imports are forecasted to increase at least 2 percent to reach 3.576 MMT.

Table 2. GFSA Wheat Import Tenders MY 24/25-MY 25-26 in MT with 12.5% protein

GFSA Wheat Purchase Tenders for MY 24/25			Tenders for MY 25/26 (Available data until report was issued)		
GFSA contract Number	Shipment Arrival Date	MT	GFSA contract Number	Shipment Arrival Date	MT
76	July 2024	363,000	83	July-Dec 2025	475,000
77	Aug-Dec 2024	415,000	84	Aug-Oct 2025	621,000
78	Sep-Oct 2024	235,000	85	Dec 2025- Jan 2026	455,000
79	Dec24-Jan 25	307,000	86	Jan 2026 – April 2026	500,000
80	Jan-March 2025	360,000	87	March- April 2026	300,000
81	Feb- April 2025	804,000	88	April -May 2026	907,000
82	May-June 2025	920,000			
Total		3,404,000	Total		3,258,000

Source: GFSA

GFSA Import Facilities

GFSA receives imported wheat from five seaports in the Kingdom, with a total combined daily unloading capacity of 46,000 MT. The four seaports on the Red Sea are the Jeddah Islamic, Yanbu Diba, and Jizan seaports, while the fifth seaport, the King Abdul Aziz Seaport, is situated on the Arabian Gulf.

Stocks

According to GFSA, nowadays its handing over the operation of silos complexes in major cities around Saudi Arabia to SABIL. The total silo capacity in the Kingdom is 3.5 MMT. while the four private flour mills have a combined storage capacity of 745,000 MT. The silos are in 14 locations throughout Saudi Arabia. Under regular world trade and geopolitical conditions, GFSA considers the world wheat supply reliable and maintains strategic wheat reserves that are equal to four months' demand. However, for the past couple of years, the organization's annual wheat reserve has been estimated at more than six months of demand.

Food Security

As mentioned earlier, GFSA focuses on creating an abundant food supply in Saudi Arabia, builds strategic reserves for targeted food and feed products (e.g., wheat, barley, cooking oil, sugar), and maintains an adequate food level for emergencies. To achieve these objectives, GFSA will conduct 20 activities. Below are some highlights:

1. Coordinating with all agencies concerned with the food security system.
2. Managing an early warning system for food security.
3. Developing and updating an emergency response plan related to food security.
4. Developing a strategic stock plan.
5. Issuing licenses for storage facilities for targeted commodities.
6. Measuring levels of food loss while setting targets to reduce waste.
7. Develop awareness programs to reduce food loss and waste.
8. Monitoring and collecting data for a new food security system.
9. Monitoring commodities in the strategic stock plan.

Flour Mill Privatization

Years ago, Saudi Arabia privatized its four flour milling companies. Below is detailed information on the four privatized wheat milling companies:

1) First Mills Company: Headquartered in the Red Sea city of Jeddah, the First Mills Company has flour mills in western, central, northern, and eastern Saudi Arabia. The company was sold to the Raha Al-Safi consortium led by the Saudi company Al-Mutlaq Group. The consortium includes another two Saudi firms (Al-Safi and Abunayyan Holding) and one UAE company (Essa Al Ghurair Investment). The First Mills Company has 4,200 MT of wheat milling and 900 MT of feed processing capacity daily.

2) Second Mills Company: Headquartered in Riyadh, the Second Mills Company has mills in central, southern, and northern Saudi Arabia. This company has 4,350 MT of daily wheat milling capacity.

3) Third Mills Company: Headquartered in the southern city of Khamis Mushait, the Third Mills Company was sold to a consortium by Al-Rajhi, a Saudi company, and two UAE companies (Al Ghurair Foods and Masafi). The company has flour mills in southern, western, and northern Saudi Arabia. The Third Mills Company has 3,451 MT of wheat milling and daily 1,400 MT of animal feed processing capacity.

4) Fourth Mills Company: The Dammam-based Fourth Mills Company has flour mills in eastern, western, and central Saudi Arabia. It has a daily wheat and animal feed milling capacity of 3,150 MT and 300 MT, respectively.

Wheat Subsidy

Even though there is an interest in ending the wheat subsidy while supporting low-income Saudis directly, very few seem to know when or if that will occur. If it does happen, there may be more opportunities for higher-quality wheat and product differentiation. Until a royal decree changes the wheat subsidy policy, privatized flour mills will continue receiving wheat from GFSA for milling and distribution at subsidized rates. Most of the revenue from the private mills is expected to come from milling fees, and privatized mills can import wheat for non-subsidized flour. Volumes are expected to be small, with most wheat used for premium products.

GFSA's Current Role After Privatization

Privatization of the wheat import industry is an ongoing process. GFSA will remain the sole importer of subsidized milling wheat and will hand over ownership and operation of most of the wheat silos across the country to SABIL. GFSA will manage the strategic wheat reserves and ensure the Kingdom's food security objectives. GFSA's post-flour mill privatization roles will include the following:

- Issue import permits for unsubsidized wheat to interested flour mills.
- Establish regulations related to wheat flour quality.
- Inspect flour mills to ensure compliance with quality regulations.
- Encourage and regulate competition among private flour mills.
- Ensure enough wheat flour is produced and delivered.

Marketing

Licensed bakeries, supermarkets, and almost all industrial end-users purchase their flour directly from GFSA's flour mills or assigned agents in their respective areas. There are more than 525 appointed distributors, and they serve approximately 11,700 establishments, of which 6,500 are licensed bakeries. The distributors provide packaged flour to licensed bakeries in 45-kg sacks and retailers in one, two, five, and 10-kg sacks. Industrial users purchase in bulk (metric tons).

Prices

Flour prices for bakers and industrial clients have not changed for the past four decades, but the wholesale price of consumer-packed flour increased by 50 percent from $0.27/kg to $0.40/kg in 2017. Large bakeries and industrial users purchase wheat flour directly from the four flour mills, while smaller bakeries and retailers receive their assigned quotas from GFSA-appointed distributors. GFSA's wholesale prices vary based on the flour type and extraction rate. Bakers purchase at prices from $5.30 to $8 per 45 kg based on flour extraction rates and flour type. Industrial users purchase in bulk between $117.30 and $160 per MT. Prices to bakers and industrial clients have not changed for decades.

Exports

Saudi Arabia does not export wheat grain. However, in MY 2024/25, Saudi Arabia exported approximately 150,000 MT of wheat products (e.g., pasta, spaghetti, and bakery products) to GCC countries and other foreign markets. The demand for Saudi wheat products in Iraq and Yemen has been very strong in recent years, and this marketing year, Saudi wheat product exports are projected to reach 225,000 MT due to food aid to nearby Arab countries. Post export forecast for MY2026/27 to reach 231,000 MT.

Tariffs:

From The Saudi Zakat, Tax and Customs Authority (ZATCA) website, The following table shows tariffs on wheat and related products:

HS Code	Product	Duty (in percent)	Required procedures
100110000000	Normal wheat for human consumption	0	Importing and exporting requires the approval of the General Authority for Food Security
110100100000	Wheat Flour	25	1- Importing and exporting requires the approval of the General Authority for Food Security. 2- Importing is subject for the Saudi Food and Drug authority approval.
190219100000	Uncooked Pasta	12	Importing is subject for the Saudi Food and Drug authority approval.
190219200000	Frozen Dough	10	Importing is subject for the Saudi Food and Drug authority approval.

Table 3. Wheat Production, Supply and Distribution (PSD)

Wheat Market Year Begins Saudi Arabia	2024/2025		2025/2026		2026/2027	
	Jul 2024		Jul 2025		Jul 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	200	200	183	183	0	183
Beginning Stocks (1000 MT)	4012	4012	3662	3886	0	3616
Production (1000 MT)	1200	1200	1100	1100	0	1100
MY Imports (1000 MT)	3100	3404	3800	3506	0	3576
TY Imports (1000 MT)	3100	3404	3800	3506	0	3576
Total Supply (1000 MT)	8312	8616	8562	8492	0	8292
MY Exports (1000 MT)	150	150	225	225	0	231
TY Exports (1000 MT)	150	150	225	225	0	231
Feed and Residual (1000 MT)	0	0	0	0	0	0
FSI Consumption (1000 MT)	4500	4580	4800	4651	0	4790
Total Consumption (1000 MT)	4500	4580	4800	4651	0	4790
Ending Stocks (1000 MT)	3662	3886	3537	3616	0	3271
Total Distribution (1000 MT)	8312	8616	8562	8492	0	8292
Yield (MT/HA)	6	6	6.0109	6.0109	0	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 in 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 harvested area is estimated at approximately 2,000 HA and produces 4,000 MT each season. Domestic production is almost entirely for human consumption typically for used in traditional Saudi dishes specially during Ramadan. Market survey indicates the average price of 1 kilogram of barley is around $1.80. In Saudi, barley is farmed mainly in Taif, Najran, Qassim, and Asir regains. Planting 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 goals.

Consumption:

Post and industry sources estimate domestic consumption for MY2025/26 at 4.323 MMT, an increase of 3 percent over MY2024/25 total consumption which was estimated at 4.2 MMT.

For MY 2026/27 Post and industry sources estimates consumption of barley to increase 2 percent to reach 4.41 MMT due to higher demand by the expanding livestock production industry which led by growing Saudi population.

Sheep and goats consume the largest portion of imported barley followed by camels. When available at competitive prices, barley is often used in place of forage products, although animals require a certain level of forage in their diets to remain healthy. Many experts predict Saudi Arabia will continue pushing for greater local animal feed consumption.

Table 4. Animal Numbers, Calendar Year:

Year	Sheep	Goat	Camels	Cows
2023	21,999,998	7,417,684	2,210,197	501,976
2024	22,055,779	7,339749	2,235,296	516,323

Source: Saudi General Authority for Statistics

Traditionally, farmers mix barley with alfalfa to feed livestock such as 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 5. Local feed barley prices compared with Alfalafa:

	Feed name/brand	KG	Average Price SAR	Feed Kind
1	Wafeer Barley	50	61	Barley
2	Wafeer Barley ground	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	50	106	Alfalfa

Source: FAS Riyadh

According to some experts, replacing barley with processed feed benefits livestock farmers in two ways:

1) According to Arabian Agricultural Services Company (ARASCO), the largest animal feed processor in Saudi Arabia, one kilo of manufactured livestock feed named "wafi" equals 1.5 kilos of grain barley.

   ARASCO markets wafi as a complete animal feed consisting of cereals, wheat bran, soybean meal, molasses, alfalfa, minerals, and vitamins. ARASCO uses the most competitive feed ingredients available to reduce production costs (feed wheat, barley, sorghum, corn or DDGS) in wafi production.

2) Processed feed is more fully digested, nutritional, and better for weight gain. MEWA reports that more than 30% of raw barley fed to livestock is discharged without being digested, thereby providing no benefit to animals regarding weight gain or nutrition.

Government Subsidies on Barley:

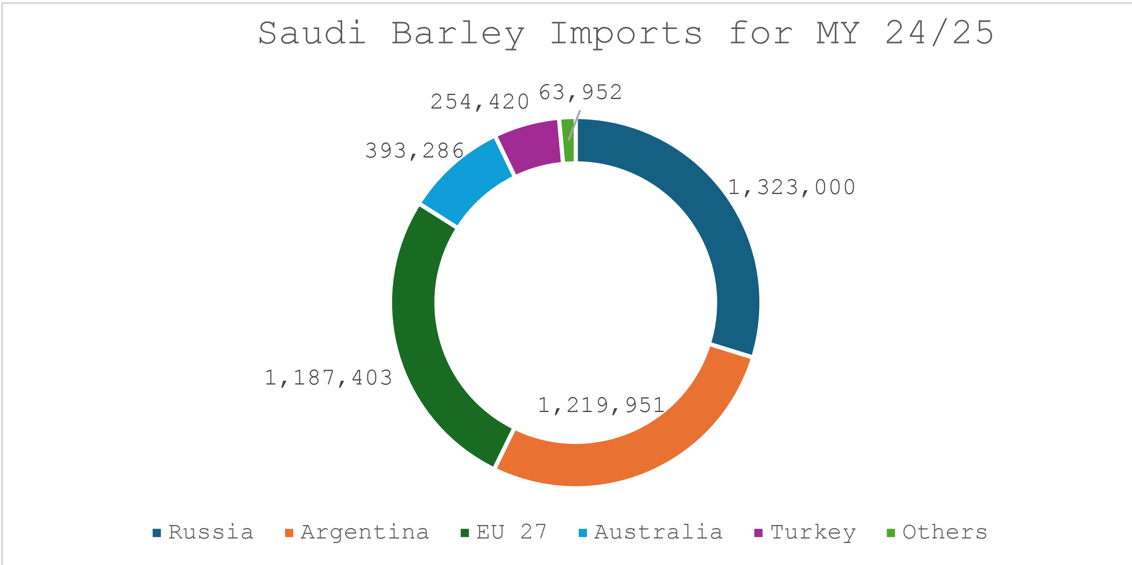
On January 1, 2020, the Saudi government revised its long-held animal feed subsidies regime and limited animal feed import subsidies to feed fibers (hay, straw, etc.) based on their protein and energy contents. The import subsidy ranges between $121 and $304 per MT. For instance, imported alfalfa hay, with a protein content of 17 percent and energy of 2,450 per MT, receives a subsidy of $304 per MT while $121 import subsidy is paid for barley straw, pellet, cubes, and brickette with the protein level of 11 percent. As of the date of this report, the table below shows the current import subsidies and requirements for some feed fibers. The following subsidies are paid to local commercial dairy farms and animal feed processors.

Table 6. List of Animal Feed Fibers that Receive Government Import Subsidies

Animal Feed	HS Code	Protein Percentage	Energy per ton	Import Subsidy Rate Per MT
Alfalfa Hay	121490900002	17	2450	$304
Alfalfa Hay Alfalfa Pellets	121410000000	11	1900	221
Rhodes Grass	121490900003	5	1600	157
Sudan Grass	121490900004	5	1600	157
Wheat straw, pellet, cubes and brickette	121300100006	2	1500	128
Corn straw, pellet, cubes and brickette	121300100008	2	1500	128
Barley straw, pellet, cubes and brickette	121300100007	2	1400	121

Trade:

Imported barley in Saudi Arabia is used almost exclusively for animal feed, and a small quantity is used for brewing nonalcoholic beer. Larger global barley supplies have led to lower international prices, which, in turn, have stimulated barley demand in Saudi Arabia. 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 increasing demand from feed processors, who incorporate barley into livestock feed formulations when its price becomes more favorable than that of yellow corn. Post estimate for MY 2025/26 imports will increase almost 2 percent to reach 4.48 MMT. And for MY2026/27 it will reach 4.57 MMT. The figure below shows the Saudi barley imports and main barley exporters to Saudi Arabia in MY 2024/25 which reached 4.4 MMT.



Source: Trade Data Monitor and industry sources

Stokes:
Post forecast Saudi's ending stokes in MY25/26 to reach 1.3 MMT, up from the previous marketing year's estimate mainly because of favorable global barley prices.

Tariffs:
From ZATCA website, The following table shows tariffs on feed barley:

HS Code	Product	Duty (in percent)	Required procedures
100390000000	Feed Barley	0	Importing and exporting requires the approval of the General Authority for Food Security

Table 7. Barley Production, Supply and Distribution Table

Barley Market Year Begins Saudi Arabia	2024/2025		2025/2026		2026/2027	
	Jul 2024		Jul 2025		Jul 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	2	2	2	2	0	2
Beginning Stocks (1000 MT)	967	967	954	1054	0	1307
Production (1000 MT)	12	12	12	12	0	12
MY Imports (1000 MT)	4000	4400	4300	4489	0	4579
TY Imports (1000 MT)	3900	4200	4600	4600	0	4285
Total Supply (1000 MT)	4979	5379	5266	5655	0	5898
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)	4000	4200	4300	4323	0	4410
FSI Consumption (1000 MT)	25	25	25	25	0	25
Total Consumption (1000 MT)	4025	4225	4325	4323	0	4435
Ending Stocks (1000 MT)	954	1154	941	1307	0	1463
Total Distribution (1000 MT)	4979	5379	5266	5655	0	5898
Yield (MT/HA)	6	6	6	6	0	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						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

CORN

Production

Approximately 135,000 MT of corn is produced annually for human consumption in the southwest region mainly in Jizan, and Asir on a planted area of 31,000 HA with an average yield of 4.4 MT per HA. Domestic corn production has been consistent over the past several years because Saudi corn growers do not receive government support through direct production subsidies or government-guaranteed prices. Saudi's government policy discourages the domestic production of water-intensive crops, including feed corn. While white corn is used for human consumption, yellow corn is used for animal feed.

Corn planting occurs twice a year in the spring and summer. The spring planting is in March, with harvest in August, while summer planting is the last week of June, with harvest from mid-November until the end of December. Approximately 60 percent of corn production is from the summer crop.

Consumption

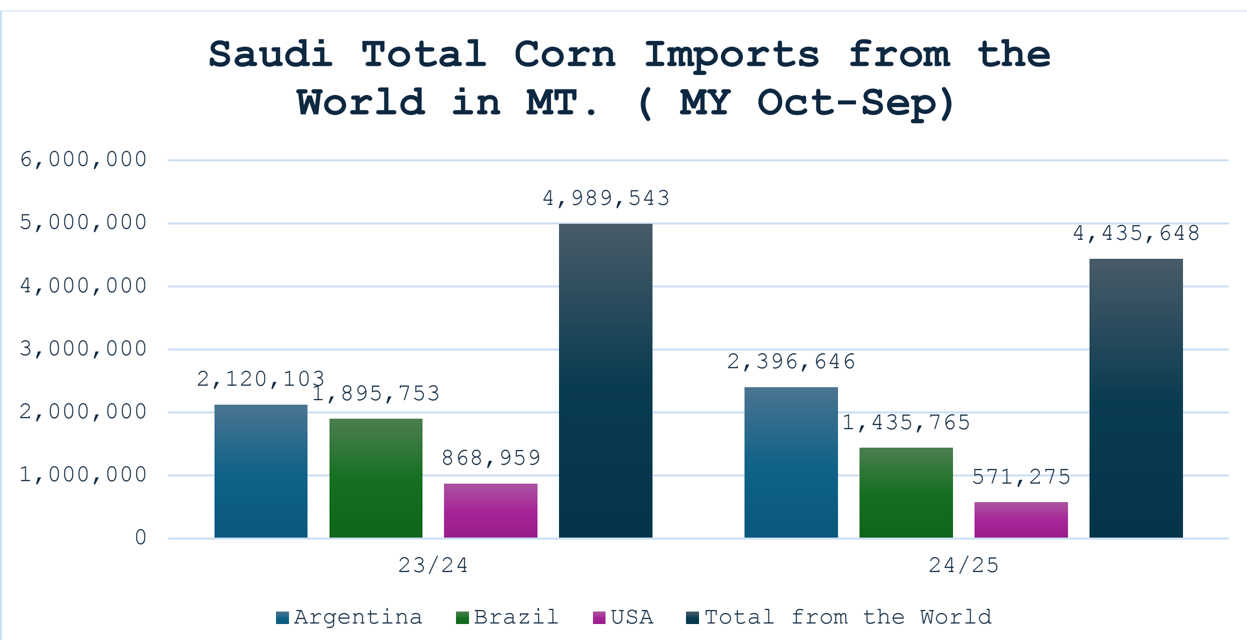
Imported corn is primarily used for animal feed. Approximately 250,000 MT is used to produce food processing ingredients, such as starch and sweeteners. Corn is a significant feed grain for poultry farms. It is also a key feed grain used by domestic dairy farms and commercial feed processors. In the Saudi growing broiler meat production, feed represents the largest expense, accounting for roughly 70% of total costs. To balance nutrition and budget, a standard local poultry ration is typically formulated using the following ratio:

- 60% Corn: Utilized as the primary energy source due to its high digestibility.
- 30% Soybean Meal: Included for its high protein concentration, essential for growth.
- 10% Other Ingredients: Supplements, vitamins, and minerals to round out the diet.

In MY 2025/26 (October – September) total corn consumption is estimated at approximately 4.65 MMT and is projected to grow by 3 percent to 4.76 MMT by the end of MY 2026/27. 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. Recently, MEWA announced that the country is around 90 percent self-sufficient in chicken meat with total production of 1.3 MMT of chicken meat and 293,000 MT of red meat. This growth should keep Saudi Arabia a reliable corn market for several years.

Trade

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 in beginning months of this marketing year. For MY 2025/26 post estimate imports will increase to reach 4.52 MMT and will increase 3 percent in MY 26/27 to reach 4.66 MMT. Imports from Latin and North America continue to dominate the market due to competitive pricing and consistent quality, especially from the U.S. The following graph shows the main countries exports corn to Saudi:



Source: Trade Data Monitor

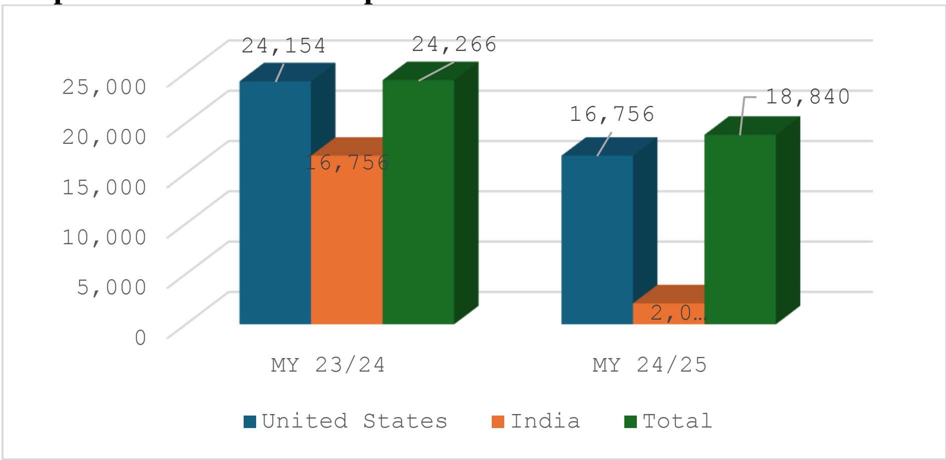
Corn Imports Subsidy

In January 2020, the Saudi government stopped providing direct per MT corn import subsidies to importers to purchase corn from international markets. However, it still provides up to $187 million annually as a direct production-based subsidy to the poultry industry, of which approximately $112 million is used to purchase corn from local corn importers or directly from the international market. However, poultry farms claim that the current production-based subsidy is insufficient to balance the increased CFR cost of imported corn.

Imports of Distillers Dried Grains with Solubles (DDGS) - HS code 230330

The demand for DDGS increases when its price is more competitive with grain corn and soybean meal. DDGS imports decreased in MY 2024/25 due to corn favorable prices and increased supply of corn worldwide. Over the past five years, the U.S. has been effectively the only supplier of DGGS to Saudi Arabia, as shown in the below trade graph:

Graph 3: Saudi DGGS Imports in MT



Source: Trade Data Monitor

There are two groups of customers for DDGS in Saudi Arabia:

1 **Dairy Farmers**: Most farmers import and use it for dairy rations when prices are competitive with corn. The dairy sector is the primary user of DDGS in Saudi Arabia, and DDGS reduces costs while producing higher milk rates.

2 **Local Feed Processors:** Demand for DDGS in this industry materializes if the price is comparable to other fiber sources. Most local processors use DDGS as a source of fiber in their feed formulation to replace other sources, such as hulls and straws.

Stocks

There is no official data on corn stock levels in Saudi Arabia. Still, major feed processors indicate they keep at least a three-month supply to ensure the supply chain isn't interrupted due to market, transportation, or other logistical issues.

Tariffs:
From ZATCA website, there is no tariffs on importing corn. And exporting feed corn is not allowed.

Table 8. Corn Production, Supply, and Distribution Table

Corn Market Year Begins Saudi Arabia	2024/2025		2025/2026		2026/2027	
	Oct 2024		Oct 2025		Oct 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	31	31	31	31	0	31
Beginning Stocks (1000 MT)	439	439	460	460	0	473
Production (1000 MT)	135	135	135	135	0	135
MY Imports (1000 MT)	4436	4436	4500	4528	0	4663
TY Imports (1000 MT)	4436	4436	4500	4528	0	4663
Total Supply (1000 MT)	5010	5010	5095	5123	0	5271
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)	4350	4350	4450	4450	0	4565
FSI Consumption (1000 MT)	200	200	200	200	0	200
Total Consumption (1000 MT)	4550	4550	4650	4650	0	4765
Ending Stocks (1000 MT)	460	460	445	473	0	506
Total Distribution (1000 MT)	5010	5010	5095	5123	0	5271
Yield (MT/HA)	4.3548	4.3548	4.3548	4.3548	0	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 harvested from 368 ha. 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:
According to the General Authority for Statistics (GASTAT) 2024 Food Security report, rice has solidified its position as the leading plant-based staple food in the Kingdom and per capita rice consumption reached 52 kg. Rice is used in many daily dishes depending on the dish and consumers preferences, many kinds of rice are imported in Saudi like:

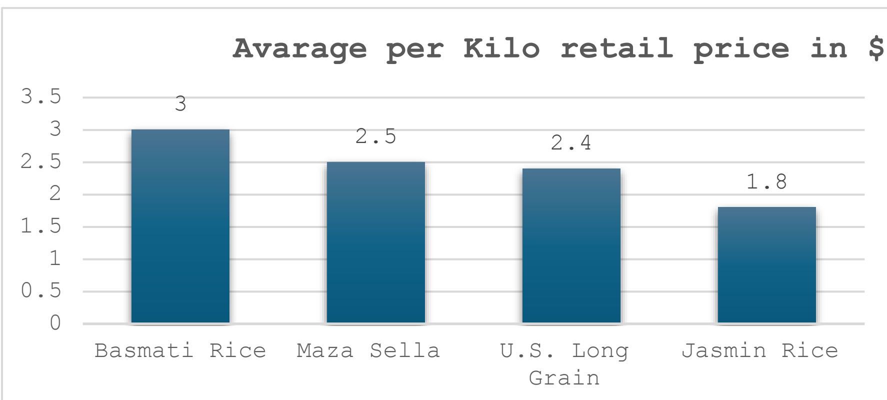
- **Basmati Rice:** A long-grain, aromatic rice that is a staple in Saudi cuisine and integral to traditional dishes like Kabsa and Mandi.

- **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 diverse consumer needs.

Saudi Rice consumption in MY 2025/26 (Jan – Dec 2026) is projected at 1.75 MMT, Rice consumption has been going up in the past years for a couple of main factors like the increase in the labor force and a sizable increase in tourism. In MY 2026/27 Post forecast consumption will increase by 2-3 percent to reach 1.8 MMT.

Saudi Arabia is a long-grain rice market, mostly basmati (long-grain white rice and parboiled "sella" basmati rice). Rice is a staple food in Saudi Arabia for lunch and dinner. A traditional dish called "kabsah" is widely consumed in Saudi. According to the Saudi General Authority for Statistics, In 2024. the total Saudi population was estimated at 35.3 million. the population estimates indicated that the Saudi population is 55.6 Saudis and 44.4 are expatriates. In 2024, The population grew by 4.7 percent in 2024, mainly because of the arrival of an estimated 1.5 million new expatriate workers.

Rice is among the most competitively priced grains and is abundantly available in Saudi Arabia. For example, A kilo of Indian basmati rice ranges between 80 cents to $3.30 per kg, depending on its variety, grade, and the brand.



Source: FAS Riyadh

Trade

Private companies freely import rice into Saudi Arabia. However, in recent years, GFSA encouraged major rice importers to ensure adequate rice reserves are kept at importer's warehouses. Most major Saudi rice importers purchase the new Indian rice crop by December yearly and complete their imports by June—meanwhile, imports from other countries, such as the United States, last throughout the year.

According to customs data, total Saudi rice imports in MY 2024/25 (January – December) reached almost 1.75 MMT, and the imports will continue to grow by two to three percent over the next several years due to expansions in the food service sector which has been resulted from the growth in population. For MY 25/26, Post forecast imports will continue to increase at least 2-3 percent to reach 1.85 MMT. And for MY 26/27 it will reach 1.89 MMT.

India continued to dominate the Saudi rice market accounting for approximately 75 percent of the Kingdom's rice imports. Historically, India has been the largest rice exporter to Saudi Arabia. Some of the main factors that contributed to India's continued dominance are:

1. The country's capability to offer various varieties (basmati and non-basmati) and different grades of rice that meet consumer's needs.
2. Competitive prices.
3. Saudi importers have extensive knowledge of the Indian rice farming and trade sectors.
4. Most major Saudi rice importers have a strong relationship with Indian farmers and the country's rice processing/packing facilities.

With an estimated 12 percent of the market, Pakistan remained the second largest rice exporter to Saudi Arabia. The United States was the third largest rice exporter to Saudi Arabia, with approximately six percent market share last year. The U.S. rice export is forecast to increase this year due to competitive rate compared to the previous year and the operation of a new parboiled rice processor in Acadia Parish, Louisiana. Although supplies are tight in the United States. Last year, U.S. long grain parboiled rice exports to Saudi Arabia reached 89,453 MT. Total imports for the medium Calrose rice were 8,606 MT. The following table will show top countries exports rice to Saudi:

Saudi Arabia Imports from World, Product Group: PSD-Rice, Milled; Annual Series

Partner Country	Rank	Annual Series (UOM1: MRE)		
		2023	2024	2025
Total from World		1,487,332	1,774,884	1,756,737
India	1	1,149,205	1,339,844	1,350,925
Pakistan	2	128,316	209,238	168,913
United States	3	80,815	102,335	115,848
Vietnam	4	27,660	33,878	36,080
Thailand	5	27,630	25,311	31,680
Australia	6	36,320	37,992	27,517
Brazil	7	8,985	6,486	7,560

Source: Trade Data Monitor

Tariffs:

Because rice is considered a staple food in Saudi, importing and exporting rice does not face any tariffs.

Stocks:

In the absence of government-managed strategic rice reserves, GFSA oversees a decentralized system where local importers are encouraged to maintain a six-month supply. In practice, most major distributors exceed this benchmark, holding substantial inventory to prevent supply chain disruptions for retailers and the food service sector. For premium varieties like long-grain white Basmati, these reserves can reach up to ten months to accommodate the traditional aging process required for optimal quality.

Competition

Currently, U.S. rice is facing relatively new challenges from Brazil, some East Asian countries (Cambodia and Vietnam), and some EU countries (Portugal, Italy, and Spain). Of particular concern is the labeling of Brazilian rice as American rice. In Saudi Arabia, people associate America with the United States of America and labeling a Brazilian rice variety as "American Rice" has created some confusion among end-users. As a result, significant marketing activities and competitive prices will help the United States maintain and increase its market share in Saudi Arabia. USA Rice is conducting several marketing activities to raise awareness of U.S. rice quality and increase demand.

Many Saudi rice companies importing from India allocate a significant part of their marketing budgets to promote their brand names, mostly on social media and FM radios. Indian and Pakistani rice exporters often participate in domestic food shows in Jeddah and Riyadh, providing buyers with point-of-sale materials. Promotions coupled with product tastings are also occasionally organized in local supermarkets.

Table 9. Rice Production, Supply, and Distribution Table

Rice, Milled	**2024/2025**		**2025/2026**		**2026/2027**	
Market Year Begins	**Jan 2025**		**Jan 2026**		**Jan 2027**	
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)	601	601	701	701	0	804
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)	1800	1800	1850	1854	0	1892
TY Imports (1000 MT)	1800	1800	1850	1854	0	1892
Total Supply (1000 MT)	2401	2401	2551	2555	0	2696
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)	1700	1700	1800	1751	0	1803
Ending Stocks (1000 MT)	701	701	751	804	0	893
Total Distribution (1000 MT)	2401	2401	2551	2555	0	2696
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