Required Report: Required - Public Distribution **Date:** March 19, 2024

Report Number: SA2024-0003

Report Name: Grain and Feed Annual

Country: Saudi Arabia

Post: Riyadh

Report Category: Grain and Feed

Prepared By: Hussein Mousa

Approved By: Mark Ford

Report Highlights:

With the development of several billion-dollar projects and nearly 30 million visitors a year, the future for U.S. grain exports is bright. Post anticipates Saudi rice imports to increase approximately five percent over the next several years due to expansions in the food service sector. Low international barley prices are projected to increase barley demand in 2024/25 as long as the local price is competitive. Meanwhile, total Saudi corn imports for MY 2024/25 are expected to reach 4.5 MMT, an increase of nearly 29 percent, due to numerous expansion projects underway in Saudi Arabia's poultry sector. Domestic wheat production is expected to significantly increase this year as Saudi Arabia focuses more on food security.

EXECUTIVE SUMMARY

Saudi Arabia continues to encourage local companies to invest in foreign agricultural sectors to produce targeted crops, especially grain products, to meet the Kingdom's food security needs. Currently, the Ministry of Water, Environment and Agriculture (MEWA) is planning to pass most of this responsibility to the Saudi Agricultural and Livestock Investment Company (SALIC), the agricultural arm of the Public Investment Fund (PIF) owned by Saudi Arabia's sovereign wealth fund. The company was formed in 2009 and invested in various foreign agricultural sectors to secure food supplies from foreign markets. It is unclear how SALIC will operate when it becomes the exclusive importer of various grain products in Saudi Arabia.

Years ago, Saudi Arabia partially rescinded a ban on domestic wheat production over concerns of the country's scarce aquafer resource reserve. This year, wheat production ramped up to meet Saudi's needs, and Post anticipates this will be common over the next several years. In 2023, more than 27 million tourists visited Saudi Arabia, which is an increase of approximately 63 percent over the 16.6 million visitors in 2022. The government projects 70 million international tourists will visit Saudi Arabia by 2030. This bodes well for U.S. wheat, rice, and corn exports to Saudi Arabia over the next several years.

Meanwhile, Saudi Arabia continues to bring in millions of workers to facilitate the construction of several billion-dollar projects throughout the country. With a growing poultry industry and a diet focused on rice, there will be plenty of opportunities for the United States to expand exports. Post anticipates, demand for rice will remain strong to meet the increasing number of consumers in the country. Historically, demand for food products peaks during Ramadan and the Hajj season, but that trend could change with so many ongoing projects underway.

WHEAT

Production

The General Food Security Authority (GFSA) is an agency of the Ministry of Environment, Water and Agriculture (MEWA) and the monopsony purchaser of domestically grown and imported wheat in Saudi Arabia. The authority estimated domestic wheat production at 1.5 million metric tons (MMT) for MY 2024/25 (July 2024 – June 2025). This is an increase of 25 percent from last year's production of 1.2 MMT. The wheat production area for this year's harvest season is estimated at 250,000 hectares (HA) with 6 MT per HA yields. This is the maximum allowed production quota for this year. MEWA may keep the maximum local production quota at 1.5 MMT or reduce or increase depending on the underground aquafer and the world wheat supply.

In Saudi Arabia, wheat is planted commencing from the end of November through the second week of January, and it is delivered to GFSA from June to October. GFSA purchases all locally produced wheat at a government set premium price compared to imports. The price is set annually after wheat has been planted, but the government has not announced the purchase price for this year's harvest. In MY 2023/24, GFSA purchased locally produced wheat at a gross price of $467 per MT compared to the average price of $394.74 per MT for imported wheat. Farmers typically switch between wheat and alfalfa depending on the gross domestic government purchase price for wheat.

Wheat is grown in Saudi Arabia under a voluntary program and limited to small farmers with no more than 50 HA of farmland. Farmers are licensed by MEWA and can produce either wheat, or alfalfa hay. Since MY 2020/21, MEWA has encouraged local farmers to produce up to 1.5 MMT annually for delivery to GFSA. In the past, farmers preferred alfalfa hay production over wheat as the crop has been more profitable than wheat. Alfalfa produces for up to three years and yields between 6 - 9 cuts a year depending on planting region and weather conditions. As a result, farmers typically make more money producing alfalfa than wheat. Accordingly, farmers were more productive cultivating wheat last year, which drastically increased output to close to 1.2 MMT. This year, wheat production is expected to reach MEWA's goal of 1.5 MMT as farmers anticipate the government purchase price to remain close to $467 per MT.

Traditionally, Saudi Arabia grows a hard-winter variety known as "Yecoro Rojo" that was developed by the International Maize & Wheat Improvement Center in cooperation with the Mexican Ministry of Agriculture in Mexico. GFSA prefers Saudi Arabian wheat compared to imported wheat due to its hard kernel and lower moisture content; two attributes that allow for extended storage times.

Government Purchase Price (GPP)

GFSA has not yet set the GPP per MT. Last year, the price was SAR 1,750 ($467) per MT as the GPP for domestic wheat production. Farmers received a net payment of approximately SAR 1,662.50 ($443) per MT after a five percent deduction for the Zakhat (Islamic religious tax), and an additional 4 percent will be deducted in case of foreign matter (impurity). Last year, GFSA paid $430.67 per MT for local wheat. The domestic purchase price is purposefully higher than international prices. The average CFR import price for GFSA purchased wheat for MY 2022/23 was $394.74 per MT (USD) per MT. Traditionally, the GFSA Board of Directors updates the local wheat purchase price for each

production season in early January of each year. Unfortunately, GFSA has not updated the price this year, and there is no timetable when it will be released to the public.

Consumption

MY 2024/25 total wheat consumption is projected at 4.75 MMT, up approximately 5 percent from the previous MY. 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 to build several eye-catching multi-billion dollars mega projects by 2030. Saudi Arabia is also constructing various luxurious resorts and other attractions on the Red Sea to attract more than 150 million visitors annually by 2030. All these projects mixed in 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, both imported and produced locally, is used exclusively for human consumption. It is illegal to feed subsidized food wheat to livestock since the government provides monthly payments to livestock farmers to help reduce their animal feed expenses. Wheat is mostly consumed in the form of a flat (pita) bread, or a local hamburger bun known as a “Samoli.” Other western-style bread, such as French baguettes and pizza, are also popular.

The annual per capita consumption of wheat in Saudi Arabia (total population – 35 million) was estimated at approximately 129.43kg (or 103.5 kg of wheat flour) in MY 2023/24. White flour constitutes the bulk of wheat flour consumed in Saudi Arabia. However, in recent years, there has been a growing demand for whole-wheat flour 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

Currently, 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 agricultural arm of the Public Investment Fund (PIF) 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.

GFSA imports hard wheat directly through public tenders that are open to registered international exporters. It does not buy through grain brokers. GFSA purchases wheat from a wide range of origins, including Australia, the EU, South America, the United States, Canada, Australia, and various Black Sea countries.

In MY 2023/24 (July 2023 - June 2024), GFSA issued five wheat tenders to import a total of 3.73 MMT, at an average price of $291.26 per MT for delivery from July 2023 to May 2024. As a result of increased domestic production, post estimates the total Saudi wheat imports for the current MY at 3.73 MMT,

down approximately 11 percent from 4.2 MMT, which was purchased last MY through six tenders. However, GFSA may purchase more quantities indicated in its international wheat purchase tenders if it considers the submitted bid prices very competitive. As such, the actual wheat quantities that arrive at Saudi ports of entry could be higher than the quantities indicated in the wheat purchase tenders. Post projects Saudi wheat imports for MY 2024/25 at 3.9 MMT, due to an estimated five percent increase in wheat demand.

Saudi Arabia continues to encourage local companies to invest in foreign agricultural sectors to produce some targeted crops, such as wheat, to export their production to meet the Kingdom's food security needs. For years, SALIC has been the dominant investor with investments in Australia, Brazil, Canada, and Ukraine. The company was formed in 2009 and started investing in various foreign agricultural sectors in 2012 to secure food supplies from foreign markets. It is unclear how SALIC will operate when it becomes the exclusive importer of wheat in Saudi Arabia.

The firm targets eight food and agricultural products (wheat, rice, beef, yellow corn, soybeans, forage, and poultry meat) and has a mandate to import food products when shortages occur in Saudi Arabia. In MY 2019/20 and 2020/21, SALIC imported a total of 700,000 MT of wheat from Ukraine from its Continental Farmers Group to Saudi Arabia. Unfortunately, the ongoing Russian conflict in Ukraine eliminated Ukrainian wheat exports to Saudi Arabia, thus negatively affecting SALIC's worldwide operations. For MY 2023/24, the firm is expected to import 710,000 MT of wheat assigned from investments in other countries.

Many anticipate SALIC will use one of its joint venture international grain groups (e.g., GB, G3 Global Grain Group, or Olam Agri Holdings) to supply wheat. To encourage more purchases, GFSA will pay a premium price for wheat supplied by a Saudi Arabian company. For example, the two tenders issued in MY 2023/24 for the total imports of 710,000 MT were tendered for an average purchase price of $296.55 per MT (delivery period of Aug 2023 – May 2024) compared to the average CFR price of $291.26 paid to foreign suppliers for 3.02 MMT wheat (delivery from July 2023 to May 2024). Detailed information on the Saudi foreign agricultural investments and the country's food security strategies are discussed at the end of this section.

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. This MY, GFSA requested Saudi investors supply up to 720,000 MT of wheat from their foreign farms. SALIC is expected to supply the quantity using investments from its international grain exporting partners (e.g., GB, G3 Global Grain Group, or Olam Agri Holdings).

GFSA Wheat Purchase Data

GFSA issued the following five international wheat import tenders for MY 2023/24 and purchased 3.73 MMT, which is expected to arrive by the end of May 2024. This is a decrease of approximately 11

percent compared to GFSA's MY 2022/23 official wheat purchase data, and 17 percent below USDA's official estimate of 4.5 MMT. GFSA's wheat imports policy hinges on meeting annual local demand and maintaining adequate strategic wheat reserve stocks. The annual strategic wheat reserve quantity depends on the prevailing world wheat supply. Total Saudi wheat imports for MY 2024/25 are forecast to decrease significantly due to higher than usual wheat reserves.

Table 1.
GFSA Wheat Purchase Tenders (MY 2022/23 and MY 2023/24)

GFSA Wheat Purchase Tenders for MY 2022/23			**GFSA Wheat Purchase Tenders for MY 2023/24**		
Shipment Arrival Date	**Quantity in MT (12.5% protein)**	**Average per MT CFR Price**	**Shipment Arrival Date**	**Quantity in MT (12.5% protein)**	**Average per MT CFR Price**
Apr - Jun 2023	1,009,000	$382.56	Feb – May 2024	1,353,000	$284.57
Mar - Apr 2023	566,000	$384.75	Jan - May 2024	355,000	$290.20
Nov 2022- Feb 2023	566,000	$371.61	Aug -Dec 2023	355,000	$302.90
Aug 2022-Feb 2023	720,000	$441.93	Sep -Oct 2023	624,000	$261.76
Sep - Nov 2022	625,000	$422.47	July -Aug 2023	1,043,000	$316.86
July 2022	689,000	$365.14			
Total wheat Imports	**4.18 MMT**	**Average price per MT = $394.74**		**3.73 MMT**	**Average price per MT = $291.26**

Source: *GFSA*

GFSA Import Facilities

GFSA receives imported wheat at four seaports in the Kingdom with a total combined daily unloading capacity of 46,000 MT. The three seaports on the Red Sea (the Jeddah Islamic, Diba "Gazan" and Yanbu seaports) can each unload 12,000 MT per day while the King Abdul Aziz Seaport on the Arabian Gulf can unload 10,000 MT per day.

Stocks

GFSA owns and operates silo complexes in major cities around Saudi Arabia. Total silo capacity in the Kingdom was 3.45 MMT by the end of 2020. GFSA owns and operates silos with a total storage capacity of 2.71 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 normal world trade and geopolitical conditions, GFSA considers the world wheat supply to be reliable and maintains strategic wheat reserves

equal to four months. However, for the past couple of years, the organization's annual wheat reserve is estimated at more than six months of consumption level.

Policy

In November 2018, Saudi Arabia partially rescinded a ban on domestic wheat production, which was in place since crop year 2015/16 over concerns of the country's scarce aquafer resource reserve. Saudi's decision to reduce domestic forage cultivation by 42.5 percent eliminated large producers from domestic forage production, although smaller-sized farmers were exempt from this regulation. Domestic wheat and forage production are completely dependent on irrigation. MEWA estimated that approximately 10.75 MMT of forage was produced in Saudi Arabia in 2015/16.

Following a major cut in local forage production in 2018/19, the government offered medium and smaller sized producers three options:

1) Terminate forage production altogether and receive financial compensation.
2) Produce forage on 50 HA.
3) Produce wheat on 50 HA.

Farmers who opted to produce wheat, or forage, must obtain licenses from MEWA and should only produce the crop they are licensed to grow until 2025. If a farmer requests to switch between the two crops, they must reapply for a new license after two production seasons, and only licensed farmers can produce wheat or forage. Any unlicensed farming of the two crops will result in a severe financial punishment. GFSA was authorized by the government to purchase up to 1.5 MMT of locally produced wheat until 2023/24 to achieve this goal, and MEWA is willing to increase the production area for small farmers if they want to increase their wheat production.

Many experts believe the government will renew their domestic wheat production policy in 2025 to meet 20 percent of its annual wheat consumption demand and to retain wheat production know-how and technology.

Food Security

As mentioned earlier, SAGO was renamed GFSA at the being of 2023. The new organization 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. In order 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. Providing an appropriate investment environment to enhance food security.
3. Designing an early warning system for food security.
4. Developing and updating an emergency response plan related to the food security.
5. Developing a strategic stock plan.
6. Issuing licenses for storage facilities for targeted commodities.
7. Measuring levels of food loss while setting targets to reduce waste.
8. Developing awareness programs to reduce food loss and waste.

9. Monitoring and collecting data for a new food security system.
10. Monitoring commodities in the strategic stock plan.

GFSA has a Secretariat General with committee members from numerous ministries (e.g., MEWA, the Ministry of Commerce, the Ministry of Education, the Ministry of Health, the Ministry of Human Resources and Social Development, the Agricultural Development Fund, Saudi Ports Authority, Zakat, Tax, and Customs Authority, the Saudi Food and Drug Authority, General Directorate of Civil Defense, the Secretariat General of the National Risk Council, the General Food Security Authority, the Federation of Saudi Chambers, and SALIC). Over the next several months, SALIC is expected to take over the responsibilities from GFSA for purchasing wheat while operating storage silos to maintain a strategic stock level. SALIC is the agricultural arm of the PIF, which is owned by the Kingdom's sovereign wealth fund.

Strategic Commodities Targeted by GFSA

These products are estimated to account for 90 percent of the agricultural products consumed in Saudi Arabia and includes: wheat, yellow corn, barley, soybean meal, rice, sugar, cooking oil, green forage, milk, chicken meat, red meat, fish, dates, vegetables (cucumber, onions, potatoes, and tomatoes), and fruit (watermelons, bananas, lemons, and oranges).

For Saudi Arabia to meet its food security demands, in 2008, it issued a food security plan known as "King Abdullah's Initiative for Saudi Agricultural Investment Abroad" (King Abdullah's Initiative). King Abdullah's Initiative focuses on guaranteeing the food supply for Saudi Arabia to build up strategic stock levels for selected grains to avoid a future food crisis. In 2016, with support from various stakeholders, MEWA revamped King Abdullah's Initiative and launched a new comprehensive strategy called the KSA Food Security Strategy and Implementation Plan.

MEWA assigned the supervision of the Kingdom's food security strategy to GFSA. One of the focal pillars of the plan encourages Saudi companies to invest in foreign countries to export part of their agricultural production to the Kingdom. The Saudi government provides incentives such as an exclusive import tender at profitable purchase prices to the Saudi private sector (companies and individuals) to produce strategic crops to meet domestic demand as well as build up storage reserves.

As stated earlier, SALIC is the dominant Saudi firm with investments in several major producing and exporting countries, such as Australia, Brazil, Canada, and Ukraine. SALIC has been exporting wheat to Saudi since MY 2019/20 from its overseas farms. Wheat produced in Ukraine comes from SALIC's Continental Farmers Group that is in the western part of the country. Unfortunately, the Russian war in Ukraine has stopped wheat exports from that farm to Saudi Arabia. SALIC does not own farms in Canada but is a partner in the G3 Global Grain Group with Bunge.

Other leading Saudi investors in foreign farming sectors include:

1. Al Rajhi International for Investment Company (www.raii.net/en). Al-Rajhi has agricultural-related investments in Egypt, Sudan, and the Ukraine.
2. Almarai Company (owner of Fondomonte Argentina and Arizona). Fondomonte Argentina produces green fodder and grains while Fondomonte Arizona is dedicated to green forage production and exports to Almarai Dairy Farms in Saudi Arabia.

Saudi Arabia uses three different mechanisms to cover its wheat security needs:

1. Local production.
2. Imports from Saudi companies located in other countries.
3. Imports from the international market.

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 per day.
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 made up by Al-Rajhi, a Saudi company, and two UAE companies (Al Ghurair Foods and Masafi). The company has flourmills in southern, western, and northern Saudi Arabia. The Third Mills Company has 3,451 MT of wheat milling and 1,400 MT of animal feed processing capacity per day.
4. **Fourth Mills Company**: The Dammam based Fourth Mills Company has flourmills 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 changing the wheat subsidy policy is issued, privatized flour mills will continue to receive wheat from GFSA to mill and distribute 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 of the wheat being used towards 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 maintain ownership and operation of most of the wheat silos across the country. GFSA will manage the strategic wheat reserves and ensure the Kingdom’s food security objectives. GFSA is expected to privatize only a part of its grain storage silos to provide a smooth transition for the new flourmills. 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 flourmills or from 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 to retailers in one, two, five and 10-kg sacks. Industrial users purchase in bulk (metric tons).

Market Development Activities

Since the resumption of wheat imports in 2008, the U.S. Wheat Associates (USWA) regional office has coordinated market development and trade servicing activities in Saudi Arabia. Though no recent market development activities have been conducted, USWA has conducted several capacity-building activities including seminars, training, and exchange programs to assist GFSA's purchasing staff better understand U.S. wheat varieties. USWA has also offered workshops on: wheat purchasing, risk management, contract terms, quality specifications, wheat inspections as well as freight and shipping costs.

Prices

Flour prices to 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 flourmills 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. However, in MY 2020/21, Saudi Arabia exported approximately 140,000 MT of wheat (e.g., wheat flour, macaroni, pasta, and spaghetti) to other Arab countries. The demand in Yemen for wheat products has been very strong in recent years and similar quantity exports are forecast to increase this year.

Table 3.
Wheat Production, Supply Demand and Distribution:

Wheat	2022/2023		2023/2024		2024/2025	
Market Year Begins	Jul 2022		Jul 2023		Jul 2024	
Saudi Arabia	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	100	197	200	250	0	250
Beginning Stocks (1000 MT)	2002	2002	3504	2219	0	2419
Production (1000 MT)	**625**	**625**	**1200**	**1200**	**0**	**1500**
MY Imports (1000 MT)	**5260**	**4175**	**4000**	**3730**	**0**	**3900**
TY Imports (1000 MT)	5260	4175	4000	3730	0	3900
TY Imp. from U.S. (1000 MT)	4	4	0	0	0	0
Total Supply (1000 MT)	**7887**	**6802**	**8704**	**7149**	**0**	**7819**
MY Exports (1000 MT)	183	183	200	200	0	200
TY Exports (1000 MT)	183	183	200	200	0	200
Feed and Residual (1000 MT)	0	0	0	0	0	0
FSI Consumption (1000 MT)	4200	4400	4400	4530	0	4750
Total Consumption (1000 MT)	**4200**	**4400**	**4400**	**4530**	**0**	**4750**
Ending Stocks (1000 MT)	3504	2219	4104	2419	0	2869
Total Distribution (1000 MT)	**7887**	**6802**	**8704**	**7149**	**0**	**7819**
Yield (MT/HA)	**6.25**	**3.1726**	**6**	**4.8**	**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 Wheat begins in July for all countries. TY 2024/2025 = July 2024 - June 2025

BARLEY

Production

Saudi barley production is estimated at approximately 4,000 MT and is used for human consumption. There is no feed barley production in the Kingdom. Locally grown barley is mainly used in specialty food items, such as soups and traditional Saudi dishes during the fasting month of Ramadan. A small quantity is used by households for barley tea.

Consumption

Imported barley is used exclusively for animal feed as there is no beer production in Saudi Arabia. Total Saudi feed barley consumption for MY 2023/24 is estimated at 3.2 MMT, down by approximately 16 percent from MY 2022/23 due to higher barley prices in the local market compared to processed animal

feed produced domestically. Low international barley prices are projected to increase barley demand by approximately 9 percent to 3.5 MMT in 2024/25 as the price of barley in the local market is expected to be competitive. Feed experts believe demand for barley will not be strong in the coming years as farmers are reducing waste, thus buying less barley, and purchasing the more nutritional and competitive processed animal feed.

Local animal feed processors report that demand for their product has nearly tripled due to their nutritional value and more competitive prices compared to grain barley. Processors report that livestock farmers have been thoroughly educated about the nutritional and cost values of processed feed versus barley imports. Locally produced feed uses corn as a main ingredient, and demand for barley is expected to continue to shrink going forward for at least three reasons:

1. Local farmers have been educated about the cost saving benefits of processed feed.
2. Benefits of processed feed regarding nutritional value (weight gain). It is reported that 1 kg of processed feed replaces 1.5 kg of barley.
3. Increased distribution of processed feed. Even though, barley distribution is more extensive than processed animal feed, local feed processors are currently distributing to regions outside of their production. Traditionally, the demand for barley decreases when competitively priced feed alternatives are widely available to farmers.

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" is equal to 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 us of the most competitive grain (feed wheat, barley, sorghum, or corn) in wafi production.
2. Processed feed is more fully digested, nutritional, and better for weight gain. (Note: MEWA reports that more than 30% of raw barley fed to livestock is discharged without being digested; thereby, providing no benefit to animals in terms of weight gain or nutrition.)

Table 4.
The Number of Livestock in the Traditional Farming Sector

Year	Sheep	Goats	Cows	Camels	Horses
2020	21,724,724	6,739,154	302,060	1,500,241	60,706
2021	17,535,421	6,095,789	354,276	1,390,091	63,374
2022	21,804,724	6,779,154	312,050	2,000,242	4,200

Source: MEWA

There is no official explanation why most livestock numbers (sheep, goats, and camels) decreased significantly in 2021 and increased sharply in 2022. However, it has been reported that livestock farmers underreported the number of their livestock in 2021 to qualify for a significant direct cash transfer that the Saudi government has been giving low-income Saudi citizens since 2017 under its "Citizen Account Program." Each qualified family member above the age of 18 with low income, or unemployed, receives SAR 3,500, or $933.33, every month while a small farmer, who owns 300 sheep, receives $639 per

month. It is not clear if the Citizen Account Program is still paying financial support on a regular monthly basis.

The animal feed subsidy was implemented in January 2020 and gives direct monthly payments to small livestock farmers. Small farmers receive the subsidy per head and can have a maximum of 300 animals from each of the four livestock categories (sheep, goats, camels, and cattle). The total subsidy budget for this category is $320 million a year. Livestock producers, the dominant users of barley, receive monthly per head subsidies of $2.13 for goats and sheep, $10.67 for camels, and $16 per head for cattle. The direct monthly payments to livestock producers are intended to help farmers purchase the feed of their choice among available alternatives, particularly between grain barley and processed feed, while the Citizen Account Program ($933.33 every month) is used to augment the recipient's monthly cost of living expenses.

Sheep and goats consume the largest portion of imported barley followed by camels. Barley for poultry feed is estimated at less than five percent of total imported barley. When it is readily 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. Historically, local feed processors have lobbied the Saudi government to cease direct or indirect subsidies to keep the domestic feed barley prices lower than processed feed. The government is currently encouraging the expansion of existing feed meals to reduce the country's heavy reliance on feed barley. Many experts predict Saudi Arabia will continue to push for greater consumption of local animal feed.

Trade

Total Saudi barley imports in 2023/24 is estimated at 3 MMT, down 23 percent from the 3.9 MMT imported a year earlier. Many attribute the sharp decrease in Saudi barley imports to the absence of Australian barely in the market. According to trade sources, Australia is exporting most of its barley to China forcing many Saudi importers to focus on barley from the Black Sea or EU, whichever is more competitive. The declining world barley prices is projected to increase total Saudi barley imports to 3.5 MMT in MY 2024/25. Saudi importers tend to import more barley than needed if prices are more attractive.

According to data compiled from the Trade Data Monitor, LLC, in MY 2022/23, Saudi Arabia imported barley from two main suppliers (Australia and the EU 27). Australia maintained its dominance with a 69 percent market share followed by the EU at 31 percent. There was no data for Ukraine and Russia even though they typically export barley to Saudi Arabia. The overall decrease in imports reflects the reduced demand for barley due to higher domestic prices compared to processed feed and the uncertainty of supplies from traditional suppliers.

Domestic Barley and Processed Feed Prices

ARASCO typically keeps the wholesale price of its 50-kg bag of "wafi" compound feed at a significantly lower price compared to barley at the same weight. The company maintains a lower price policy to educate livestock farmers about the cost and weight gain benefits of its feed compared to grain barley, but farmers prefer barley due to easy transportation and storage.

Currently, a 50-kg of barley is sold for $20.24 inclusive of the 15 percent VAT at packing terminals while the same quantity of locally processed feed (wafi) is sold at $19.01 (price in March 2024). Compared to barley, ARASCO is only competitive in the central, eastern, and western regions of Saudi Arabia, since it only has two feed processing facilities, while barley can be found throughout the country. High transportation costs and the availability of green forage makes wafi noncompetitive in the northern provinces (primarily Tabuk and Al-Jouf). In those provinces, the wholesale price of wafi is similar to barley and not desirable by livestock farmers.

Table 5.
Saudi Barley Imports

Barley Imports				
	July 2021 - June 2022		July 2022 - June 2023	
Report Country	Quantity (MT)	Market Share	Quantity (MT)	Market Share
Australia	2,784,222	68%	2,710,006	69%
EU - 27	574,669	14%	1,203,404	31%
Ukraine	372,776	9%	NA	NA
Russia	370,669	9%	NA	NA
Other countries	99		153	0%
Total	**4,102,435**	**100%**	**3,913,563**	**100%**

(***Source: Trade Data Monitor, LLC)***

Stocks

No official stock level is available, but importer facilities estimate a stock level of approximately 20 percent of total consumption.

Table 6.

Barley Production, Supply and Distribution Data Statistics:

Barley	**2022/2023**		**2023/2024**		**2024/2025**	
Market Year Begins	**Jul 2022**		**Jul 2023**		**Jul 2024**	
Saudi Arabia	**USDA Official**	**New Post**	**USDA Official**	**New Post**	**USDA Official**	**New Post**
Area Harvested (1000 HA)	2	1	2	1	0	1
Beginning Stocks (1000 MT)	991	991	980	1105	0	905
Production (1000 MT)	14	4	12	4	0	4
MY Imports (1000 MT)	**4300**	**3914**	**3100**	**3000**	**0**	**3500**
TY Imports (1000 MT)	3100	3000	3600	2500	0	3800
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0

Total Supply (1000 MT)	**5305**	**4909**	**4092**	**4109**	**0**	**4409**
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)	**4300**	**3800**	**3100**	**3200**	**0**	**3500**
FSI Consumption (1000 MT)	25	4	25	4	0	4
Total Consumption (1000 MT)	4325	3804	3125	3204	0	3504
Ending Stocks (1000 MT)	980	1105	967	905	0	905
Total Distribution (1000 MT)	**5305**	**4909**	**4092**	**4109**	**0**	**4409**
Yield (MT/HA)	7	4	6	4	0	4

(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 2024/2025 = October 2024 - September 2025

CORN

Production

Saudi Arabia corn production and planting area have been revised based on data obtained from MEWA. Saudi total corn production in MY 2022/23 is estimated at 111,400 MT, which was planted on 25,373 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, neither through direct production subsidies nor by 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 200,000 MT is used in the production of food processing ingredients, such as starch and sweeteners. Approximately 52,900 MT of white corn was harvested in MY 2022/23 and used for human consumption as corn-on-the-cob or milled for flour by small neighborhood flourmills. The 58,500 MT yellow corn produced last year was yellow corn and was used for animal feed. Corn continues to be a very important feed grain for poultry farms, and it accounts for approximately 60 percent of poultry feed formulations. It is also a key feed grain used by domestic dairy farms and commercial feed processors.

Feed accounts for approximately 70 percent of broiler meat production costs. Over the past several years, the Saudi poultry sector has hit near-record high feed costs driven by the convergence of a tight supply of main feed ingredients (corn and soybean meal) and record freight costs (eased in recent months). The recent significant decrease in the feed corn prices has been a welcome sign by the poultry

industry, and they hope for a continued reduction in freight prices over the next few months when feed from North and South America becomes available. A typical local poultry ration is made up of 60 percent corn, 30 percent soybean meal, and 10 percent other ingredients. Corn is preferred because it is highly digestible and a good source of dietary energy while soybean meal is preferred for its high protein content.

MY 2022/23 total corn consumption is estimated at approximately 3.35 MMT and projected to grow by approximately nine percent this year and show a substantial increase of nearly 33 percent to 4.45 MMT by the end of MY 2024/25. The main factor for the drastic increase in feed corn demand is expansion in the local chicken meat production sector. The country is striving to meet 85 percent of its total chicken meat demand from local production at the end of 2025. In 2022, Saudi Arabia produced 1.13 MMT of chicken meat, or 68 percent of the total chicken meat consumption. The country is working towards self-sufficiency, in the poultry sector, by 2030. The intensive use of corn by local chicken farms is projected to cause exponential growth in demand for corn over the next several years. This should keep Saudi Arabia a reliable corn market for the next several years.

Corn is used in the dairy sector and the commercial feed processing companies. Though the dairy sector is consistent with its corn use in its feed formulations, the local animal feed processor such as ARASCO, determine their corn usage depending on prevailing international prices. When prices are competitive as they are this marketing year, the use of corn is very high. Historically, commercial livestock feed processors increase their corn usage up to 40 percent when prices range between $230 - $240 per MT. On the other hand, when the price of corn and other grain alternatives are high, larger feed processors increase the use of fiber sources (e.g., wheat bran, alfalfa, and soy hulls) to reduce the need for corn. In MY 2022/23, the CFR Saudi port of entry price was approximately $340 per MT and processors increased the use of fiber sources in place of corn.

Industrial Use

The Middle East Food Solution Company (MEFSCO), which is a joint venture between ARASCO and Cargill, is the most important end-user of corn and manufactures starch-based products for Saudi Arabia (Kingdom) market and the MENA region. MEFSCO's plant produces starches, sweeteners, glucose, high fructose corn syrups and other food processing ingredients for confectioneries, juices, and bakeries. Based in Al-Kharj, MEFSCO depends on imported corn and crushes approximately 200,000 MT of corn annually. The factory produces 3,000 MT of corn gluten feed (CGF) and 1,000 MT of corn gluten meal (CGM) daily, which are shipped to local dairy farms.

Trade

Total Saudi corn imports for MY 2024/25 is projected to reach 4.5 MMT, an increase of nearly 29 percent from this year's estimate of 3.5 MMT. Post projects an increase in corn imports due to huge expansion projects throughout the country to increase domestic chicken meat output. Even though, Saudi Arabia's corn imports for the first five months of this marketing year (Oct. 23 – Feb. 24) indicated a 52 percent reduction compared to the same period last year (793,565 MT vs. 1.67 MMT), the prevailing attractive CFR for corn and a growing broiler meat sector are expected to drastically increase imports over the next seven months to bring total imports to 3.5 MMT by the end of MY 2023/24. Brazil was the sole exporter of corn to Saudi Arabia during the first five months of this MY.

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 not good enough to balance the increased CFR cost of imported corn.

In MY 2022/23, Saudi Arabia imported about 3.3 MMT, approximately 19 percent below total imports in MY 2021/22. Brazil was the largest exporter of corn to the Kingdom in MY 2022/23 and accounted for 56 percent of total imports. Argentina was second with 22 percent and the United States was the third largest exporter with 19 percent.

Table 8.
Saudi Corn Imports for Two MY's

Saudi Corn Imports (Metric Tons)				
Exporter	Oct 22 – Sep 23	Market Share	Oct 21 – Sep 22	Market Share
Brazil	1,408,900	56%	906,809	57%
Argentina	1,166,818	22%	2,271,681	17%
US	556,254	19%	766,034	24%
Paraguay	76,948	3%	106,151	0%
Ukraine	63,034		0	
EU-27	8,279	0%	8,082	1%
Other	9,557	0%	8,439	0%
Total	**3.3 MMT**	**100%**	**4.1 MMT**	**100%**

(Source: Trade Data Monitor, LLC)

Stocks

There is no official data on corn stock levels in Saudi Arabia, but 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.

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

In MY 2022/23, Saudi Arabia imported 47,283 MT of DDGS, and all of it was from the United States. This is a drastic increase compared to 9,262 MT, and most of it is due to favorable prices throughout the year. Over the past two MY's, the United Sates has been the only supplier of DGGS to Saudi Arabia. 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 to that of corn. The dairy sector is the main user of DDGS in Saudi Arabia and imports DDGS to reduce costs while producing higher milk rates.
2. **Local Feed Processors**: Demand for DDGS in this industry materializes if the price is comparable to that of 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 straw.

The Saudi animal feed market depends heavily on corn and soybean meal for its feed formulations and DDGS is mostly used as a replacement for fibers if prices are competitive. According to local feed processors, if DDGS prices are comparable to that of hulls, it is preferred due to richer nutritional attributes. According to sources, a local major livestock meal processor reportedly imports wheat bran for less than $200 CFR per MT.

Table 10.
Production, Supply and Distribution Data Statistics:

Corn Market Year Begins Saudi Arabia	2022/2023		2023/2024		2024/2025	
	Oct 2022		Oct 2023		Oct 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	2	25	2	25	0	25
Beginning Stocks (1000 MT)	415	415	430	476	0	436
Production (1000 MT)	**15**	**111**	**15**	**110**	**0**	**110**
MY Imports (1000 MT)	**3300**	**3300**	**4600**	**3500**	**0**	**4500**
TY Imports (1000 MT)	3300	3300	4600	3500	0	4500
TY Imp. from U.S. (1000 MT)	554	554	0	0	0	0
Total Supply (1000 MT)	**3730**	**3826**	**5045**	**4086**	**0**	**5046**
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)	**3100**	**3100**	**4400**	**3400**	**0**	**4200**
FSI Consumption (1000 MT)	**200**	**250**	**200**	**250**	**0**	**250**
Total Consumption (1000 MT)	**3300**	**3350**	**4600**	**3650**	**0**	**4450**
Ending Stocks (1000 MT)	430	476	445	436	0	596
Total Distribution (1000 MT)	**3730**	**3826**	**5045**	**4086**	**0**	**5046**
Yield (MT/HA)	7.5	4.44	7.5	4.4	0	4.4

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, and begins in October for all countries. TY 2024/2025 = October 2024 - September 2025

RICE

Production

There is no rice production in Saudi Arabia, and the country relies on imports to meet its domestic needs.

Consumption

Saudi Rice consumption in MY 2024/25 (January – December 2025) is projected at 1.6 MMT, an increase of approximately six percent over the MY 2023/24 estimate. Two main factors attributed to the significant surge in domestic rice consumption:

1. An increase in tourism. In 2023, total inbound tourists were estimated at 27 million, an increase of approximately 63 percent over the 16.6 million visitors in 2022. The government projects 70 million international tourists will visit Saudi Arabia by 2030.
2. An increase in the labor force. Saudi Arabia is bringing in millions of workers to facilitate the construction of several billion-dollar projects throughout the country.

Post anticipates, demand for rice will remain strong over the next several years to meet the increasing number of consumers in the country. Historically, demand for rice and other food products peaks during Ramadan and the Hajj season.

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 that is served for lunch and dinner. A traditional dish called "kabsah" is widely consumed in both Saudi and expatriates' homes and nearly all residents of the country include rice as a major part of their daily diet. Most of the estimated 14 million expatriates living in Saudi Arabia (from the Indian subcontinent and other Asian countries) are considered the heavy users of rice.

Rice is one of the most competitively priced grains that is abundantly available in Saudi Arabia. A price for a kilo of Indian basmati rice ranges between 85 cents to $3.40 per kg depending on its variety and grade. U.S. parboiled long grain rice is sold for $2.10 per kg while Australian Calrose rice is sold for $1.40. In 2023, the Saudi population was estimated at approximately 36.9 million with a per capita rice consumption of approximately 37.9 kg.

Basmati (aromatic rice from the Indian subcontinent) is the most popular rice variety in the Saudi market. The American long-parboiled and medium-grain Calrose rice varieties are well known, but Saudi consumers' preference has shifted to basmati varieties in recent years. While Indian basmati rice is mostly consumed in the eastern, central, and western regions of Saudi Arabia, American rice is popular in the southern region. It is also very popular in restaurants that prepare kabsah dishes.

Most consumers in Saudi Arabia prefer aged basmati rice and Saudi rice importers store new harvested basmati rice for several months to improve the cooking quality of the rice and to maintain the quality of their branded rice. According to some importers, newly harvested basmati rice is very soft and sticky if cooked before it is aged, and the aging process improves the quality by maintaining several key

attributes (e.g., fluffy, fragrant, and long grain). Each year, major Saudi importers market their aged rice for several months before they offer the new year products. It is not unusual to find basmati rice stored for several years in Saudi houses for aging purposes and as a reserve stock.

Trade

Private companies freely import rice into Saudi Arabia. However, in recent years, GFSA implemented strategies with major rice importers to assure adequate rice reserves are kept at importer's warehouses. Rice does not face a tariff and is not subsidized. Most major Saudi rice importers purchase the new Indian rice crop by December each year and complete their imports by June. Meanwhile, imports from other countries, such as the United States, last throughout the year.

MY 2024/25 Saudi rice imports (Jan. – Dec. 2025) are projected at 1.62 MMT, an increase of approximately four percent over the MY 2023/24 estimate. Saudi rice imports are projected to increase approximately five percent over the next several years due to expansions in the food service sector.

India continued to dominate the Saudi rice market in MY 2022/23 and exported 1.23 MMT of rice to Saudi Arabia, an increase of 22 percent over the previous MY and accounted for approximately 82 percent of the Kingdom's rice imports. Historically, India has been the largest rice exporter to Saudi Arabia accounting for more than 75 percent of total imports annually. 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 grades of rice that meet consumer's needs.
2. Competitive prices.
3. Saudi importers extensive knowledge of the Indian rice farming and trade sectors.
4. Most major Saudi rice importers have a strong relationship with Indian farmers and rice processing/packing facilities in the country.

With an estimated nine percent of the market, Pakistan remained the second largest rice exporter to Saudi Arabia. Rice exports from Pakistan decreased approximately seven percent from last year. Pakistani basmati rice is known for its superior quality and should remain integral in the Saudi market for years to come.

The United States was the third largest exporter of rice to Saudi Arabia with approximately six percent market share last year. MY 2022/23, U.S. rice exports were 85,659 MT, an increase of approximately 13 percent over the previous year. The U.S. rice export is forecast to increase significantly this year due to abundant supply of U.S. Calrose (medium-grain rice) rice variety at a very competitive rate compared to the previous year.

Although supplies are tight in the United States, there is strong demand for an estimated 20,000 MT of additional U.S. parboiled rice in the Saudi market. Post forecasts total U.S. rice exports to Saudi Arabia to reach approximately at 100,000 MT by the end this year.

Table 11.
Saudi Rice Imports (MT) for MY 2021-2022 & MY 2022-2023

Exporters	2022	Market Share	2023	Market Share
India	1,012,565	79%	1,234,974	82%
Pakistan	145,837	11%	135,000	9%
United States	75,655	6%	85,659	6%
Thailand	14,636	1%	26,273	2%
Turkey	4,479	0%	8,873	1%
Cambodia	7,747	1%	7,470	0%
Brazil	8,438	1%	7,289	0%
EU 27	8,939	1%	5,359	0%
Other Countries	1,221	0%	474	0%
Total	**1.3 MMT**	**100%**	**1.5 MMT**	**100%**

(Source: Trade Data Monitor, LLC)

Stocks

There are no government maintained strategic rice reserves. However, GFSA encourages local rice importers to maintain a strategic stock level of approximately six months. As a result, major rice importers hold several months of strategic stocks in their warehouses. A strategic stock of more than six months is usually kept by most major rice importers to assure that all commitments to customers (e.g., catering companies, the food service industry, and retailers) are met without any interruptions. The ageing requirement of long-grain white basmati rice increases the stock level to up to ten months.

Overall, it is the practice of nearly all major Saudi importers to maintain several months of rice reserves, and it is also not unusual for individual households to store several kilograms of basmati rice for ageing purposes to increase the quality of the rice. Post anticipates the demand for rice to remain strong for several reasons:

- Rice is a staple food.
- The country does not produce rice.
- The need to maintain high-strategic stock reserves.
- An expected high demand when regular travel resumes to Saudi Arabia.

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 labelling a Brazilian rice variety as “American Rice” has created some confusion among end-users. As a result, significant marketing activities along with 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 of the Saudi rice companies that import from India allocate a significant part of their marketing budgets to promote their own brand names, mostly on social media and FM radios. Indian and Pakistani rice exporters often participate in domestic food shows in Jeddah and Riyadh where they provide buyers

with point-of-sale materials. Promotions coupled with product tastings are also occasionally organized in local supermarkets.

Table 12.
Rice Production, Supply and Distribution Data Statistics:

Rice, Milled	2022/2023		2023/2024		2024/2025	
Market Year Begins	Jan 2023		Jan 2023		Jan 2024	
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)	364	364	451	475	0	565
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)	1487	1511	1500	1560	0	1620
TY Imports (1000 MT)	1487	1511	1500	1560	0	1620
TY Imp. from U.S. (1000 MT)	86	0	0	0	0	0
Total Supply (1000 MT)	1851	1875	1951	2035	0	2185
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)	1400	1400	1550	1470	0	1560
Ending Stocks (1000 MT)	451	475	401	565	0	625
Total Distribution (1000 MT)	1851	1875	1951	2035	0	2185
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 2024/2025 = January 2025 - December 2025

Attachments:

No Attachments