

Voluntary Report – Voluntary - Public Distribution

Date: June 05, 2025

Report Number: SA2025-0006

Report Name: An Overview of the Aquaculture Industry in Saudi Arabia

Country: Saudi Arabia

Post: Riyadh

Report Category: Agricultural Situation, Exporter Guide, Fishery Products, National Plan, Oilseeds and Products

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Report Highlights:

Evolving dietary preferences and a strong economy can pave the way for U.S. seafood and fish feed exports to meet domestic demand. Saudi Arabia has invested heavily in aquaculture to meet domestic demand for seafood with innovative production technologies. Despite this growth in seafood consumption, per capita fish and seafood consumption is relatively low at 11.7 kg, while the government aims to increase consumption to 20 kg by 2030.

Overview

Historically, seafood was a primary protein source for Saudis living near cities near the coasts like Jeddah, Dammam, and Jizan. Nowadays, government encouragement for a healthier lifestyle and the increasing number of expats moving to Saudi Arabia have significantly increased demand for seafood. Saudi Arabia has two coastlines: the Red Sea to the west and the Arabian Gulf to the east. See Map 1. Approximately 2,400 km (1,500 miles) of undeveloped coastline could be used for aquacultural development.

The Red Sea Coast is around 1,760 kilometers (1,100 miles) long, stretching from the Gulf of Aqaba in the north to Yemen in the south. It holds most of the aquacultural production in Saudi Arabia because of its natural environmental advantages, like weather and water quality.

The Arabian Gulf (Persian Gulf) coast is around 560 kilometers (350 miles) long, where most of the Saudi wild-caught seafood comes from.

Map 1. Surrounding seas of Saudi Arabia



Source: CIA Fact Book

Photo 1. A Saudi fish farm producing shrimp in the Red Sea



Source: National Aquaculture Group (NAQUA) website

In recent years, there has been a dramatic rise in local and international investment in Saudi Arabia's aquaculture industry. A notable example is The Saudi Agricultural and Livestock Investment Company ([SALIC](#)), which is owned by the Saudi Public Investment Fund ([PIF](#)), increasing its stake in the National Aquaculture Group ([NAQUA](#)) - which is recognized as one of the world's most extensive integrated aquaculture operations.

Production

Aquaculture production began in the early 1980s and has continued to expand and become more advanced. The volume of aquaculture exports increases yearly. The 2023 catch in marine fisheries exceeded 74 thousand tons, an increase of 16% over 2022. Total fish production reached nearly 140 thousand MT.

Table 1 Major indicators in 2023(MT)

Supply				Use			Percentage of production to total supply
Fisheries	Fish farming	Imports	Total supply	Consumption	Exports	Total use	
74,700	139,949	162,503	377,152	332,193	44,959	377,152	56.9 %

Source: Ministry of Environment, Water and Agriculture, General Authority for Statistics

Table.2 Total seafood catch and agricultural farming production in Saudi Arabia (MT)

Year	Wild Catch			Aquacultural Farming			Total Production	Percentage of change
	Red Sea	Arabian Gulf	Total	Inland	Sea	Total		
2012	26,130	45,261	71,391	5,073	12,210	17,283	88,674	
2013	24,466	37,302	61,768	5,610	3,580	9,190	70,958	-1.9
2014	23,933	44,062	67,995	6,060	17,810	23,870	91,865	29.4
2015	23,062	41,820	64,882	6,825	31,945	38,770	103,652	12.8
2016	23,356	43,182	66,349	7,710	32,570	40,280	106,818	3
2017	23,269	43,080	66,349	8,500	46,500	55,000	121,349	13.6
2018	24,016	43,928	67,944	6,546	65,766	72,312	140,256	15.5
2019	24,164	42,042	66,206	9,217	66,113	75,330	141,536	0.9
2020	22,791	41,888	64,679	22,763	77,237	100,000	164,979	16.5
2021	21,503	41,859	63,362	27,705	86,197	113,902	177,264	7.4
2022	23,846	40,417	64,264	30,863	89,632	120,495	184,759	4.2
2023	27,719	46,981	74,700	47,458	92,491	139,949	214,649	16.1

Source: MEWA 2023 Statistical book

Aquaculture

In the early 1980s, when international bodies made recommendations for studies on fish wealth in Saudi Arabia, the Jeddah Fisheries Research Center (JFRC) was established. The goal was to conduct studies on prospective species suitable for fish farming in the Kingdom and introduce new aquaculture hatchery technologies, train qualified Saudis, choose ideal aquaculture sites, and give technical and advisory support to aquaculture farms. Saudi Arabia's aquaculture production is made up of White Shrimp, Barramundi, Seabream, and Tilapia. Saudi Arabia has become one of the world's biggest producers and exporters of White Shrimp, exporting to over 40 countries.

King Abdullah University of Science and Technology ([KAUST](#)), started the Aquaculture Development Program in collaboration with the Ministry of Environment, Water, and Agriculture ([MEWA](#)). KAUST and MEWA partnered in June 2024 to transform Saudi Arabia's aquaculture landscape. This initiative expects to boost domestic production from 280,000 tons in 2024 to 530,000 tons annually by 2030. One of the program's goals is to offer official investment support for investors interested in commercializing innovative aquaculture projects directly from the government.

Photo 3. KAUST R&D site



Source: KAUST website

Under MEWA supervision, the [Saudi Aquaculture Society](#) was formed. Their mission is to participate in preparing the requirements and standards necessary to be applied to the aquaculture industry. Also, conferences and exhibitions for the sector are held, and participation is held inside and outside the Kingdom. Also, one of their initiatives is "[SAMAQ](#)" (Saudi Mark of Aquaculture Quality), the Saudi national aquaculture product certification and labeling program given to local farms that meet their high production and quality standards.

Consumption, Distribution, and Trade

In 2020, per capita seafood consumption in Saudi Arabia was 11.7 kilograms (kg), considerably lower than the world average of 21.3 kg, because of traditional consumption patterns like preference for red meat and poultry. However, as mentioned before, the average per capita seafood consumption in coastal cities is higher. MEWA and other governmental bodies are targeting 20 kg per capita of seafood consumption by 2030.

Saudi Arabia's seafood distribution network relies heavily on major cities' designated fish markets, supermarkets, and e-commerce platforms. These markets offer fresh, farmed, and imported selections. A key characteristic is that most of the exported seafood is farmed. Locally, farmed seafood's lower price point and consistent, year-round availability make it the preferred choice for the Hotel, Restaurant, and Institutional (HRI) sector, effectively meeting their demands for a reliable supply.

Photo 4. NAQUA stand



Aquafeed plays a significant role in aquaculture farming operations. According to the General Authority for Statistics (GAS), in 2023, the consumption of fish feed for inland agriculture was 87,204 MT and for sea farming reached 211,287 MT, for a total of 298,491 tons. Some of the leading producers and importers of Aqua feed are [ARASCO](#), Maram Feed Mill, and Al Hejaz Feed Company.

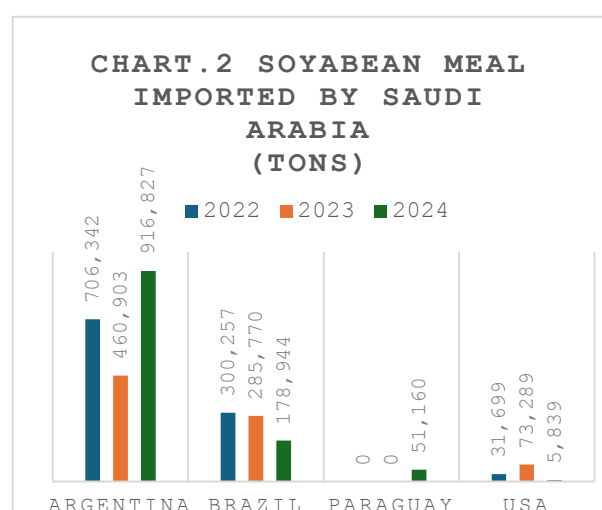
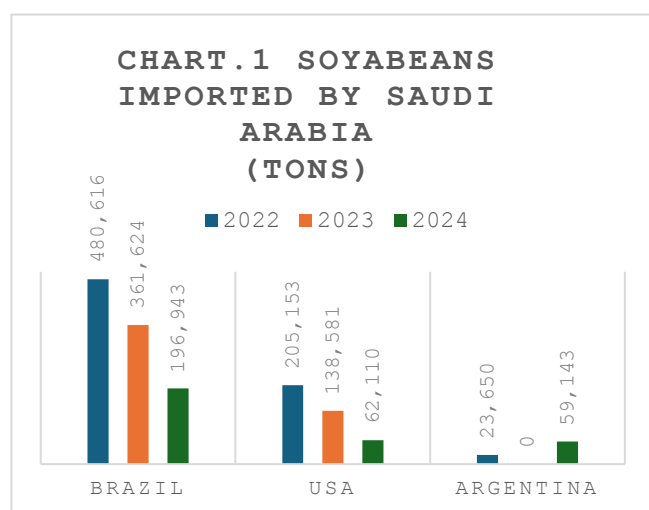
More recently, some aquaculture producers like NAQUA have started producing aquafeed with research and development help from KAUST. Post anticipates that demand for aquafeed and its ingredients will increase with all ongoing developments in the aqua sector. Soybeans are a main ingredient in aquafeed manufacturing.

In 2024, Saudi Arabia imported some 1.4 million tons of soybeans and soybean meal. The U.S. has been one of Saudi Arabia's leading suppliers of soybeans. The U.S. exported 62,110 tons of soybeans and was ranked second after Brazil. Soybeans are an important ingredient for both poultry and aquaculture feed production.

Photo 5 Aquafeed varieties produced locally



Source: Taken by FAS Riyadh



Source: Trade Data Monitor

The following tables show Saudi Arabia's seafood imports and exports.

Table 3. Saudi Seafood Imports (Tons)

Commodity: Fish and Crustaceans, Molluscs and Other Aquatic Invertebrates

Partner Country	Rank	Calendar Year (UOM1: T)				
		2020	2021	2022	2023	2024
World		145,515	160,027	166,277	178,283	176,083
Vietnam	1	53	14,397	24,775	34,994	39,050
Myanmar	2	32,098	28,678	35,564	41,302	35,220
Yemen	3	19,008	32,800	26,710	24,886	25,277
Oman	4	23,625	25,425	23,756	25,114	23,209
Thailand	5	65,69	11,789	7,894	7,278	14,041

Source: Trade Data Monitor LLC

Table 4. Saudi Seafood Exports (Tons)**Commodity:** Fish And Crustaceans, Molluscs and Other Aquatic Invertebrates

Partner Country	Rank	Calendar Year (UOM1: T)				
		2020	2021	2022	2023	2024
World		29,411	36,034	4,6055	42,755	48,964
China	1	4,705	10,194	2,0976	21,269	16,202
Bahrain	2	7,330	6,046	4,967	5,126	6,803
Kuwait	3	6,822	6,169	4,417	3,676	4,502
Russia	4	33	1,566	114	0	3,783
United Arab Emirates	5	2,399	2,379	2,018	1,916	2,773

Source: Trade Data Monitor LLC**Table 5. Saudi Arabia Exports to the World by Species (Tons):**

Subheading	Description	Rank	Calendar Year (UOM1: T)				
			2020	2021	2022	2023	2024
03	fish and crustaceans, molluscs and other aquatic invertebrates		29411	36034	46055	42755	48964
030617	shrimp and prawns, frozen, other than cold-water	1	10594	17414	31917	29510	29690
030499	fish meat, frozen, nesoi	2	3421	3803	3802	4776	5757
030636	other shrimp, live, fresh, or chilled	3	0	584	1015	1151	4175
030449	fish fillets, fresh or chilled, nesoi	4	0	0	0	0	1826
030244	Mackerel (scomber scombrus, scomber australasicus, scomber japonicus), fresh or chilled	5	5092	4666	3213	2570	1387
030633	live crabs, fresh or chilled	6	0	432	542	206	1002

Source: Trade Data Monitor LLC**Further Information**

Saudi importers, agents, or distribution companies attend large trade shows such as Gulfood in Dubai and Saudi Agriculture, Saudi Food, SIMCE, and HORECA in Riyadh. Food trade shows in Saudi Arabia can be helpful to visit before deciding to enter the market and promote a product. Seafood companies wanting to export to the Saudi market must register with the Saudi Food and Drug Authority (SFDA) system by following the U.S. FDA's instructions.

Attachments:

No Attachments.