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Report Highlights:

Egypt's wheat imports for marketing year 2025/26 are estimated at 13.0 million metric tons, unchanged from Post's estimate in the previous marketing year which was revised upward by 4 percent due to the availability of forex contributing to an increase in imports. Wheat flour exports to other Middle Eastern and African countries continue to increase due to the lack of operating milling capacities in countries of conflict. Total corn consumption is forecasted to increase to 15.8 MMT as the poultry sector rebounds. Rice imports are estimated at 185,000 MT in MY 2025/26, unchanged from Post's previous estimate.

EXECUTIVE SUMMARY:

Egypt's forecasted increase in wheat imports for marketing year (MY) 2025/26 (July-June) is driven by the availability of foreign currency throughout 2024, enabling private companies to purchase larger volumes of milling wheat. A continuation of high imports in the forecasted marketing year are also due to expected large volumes of wheat flour exports. Wheat production in MY 2025/26 is estimated, higher on a slightly larger area due to competitive procurement prices set by the Government of Egypt (GOE).

According to media reports, Egypt's General Authority for Supply Commodities (GASC) (Egypt's primary procurement arm for imports, especially wheat) was replaced by the Future of Egypt for Sustainable Development in late 2024. This information was revealed in a December 6, 2025 letter, to the Russian Minister of Agriculture which noted the new entity would be the primary importer for food items through both private deals and tenders.

Rice production and imports remain unchanged from the previous marketing year as consumers are shifting to better priced starch commodities such as pasta and potatoes. Corn imports are also expected to increase as the poultry sector (a main consumer of corn for feed) recovers.

WHEAT

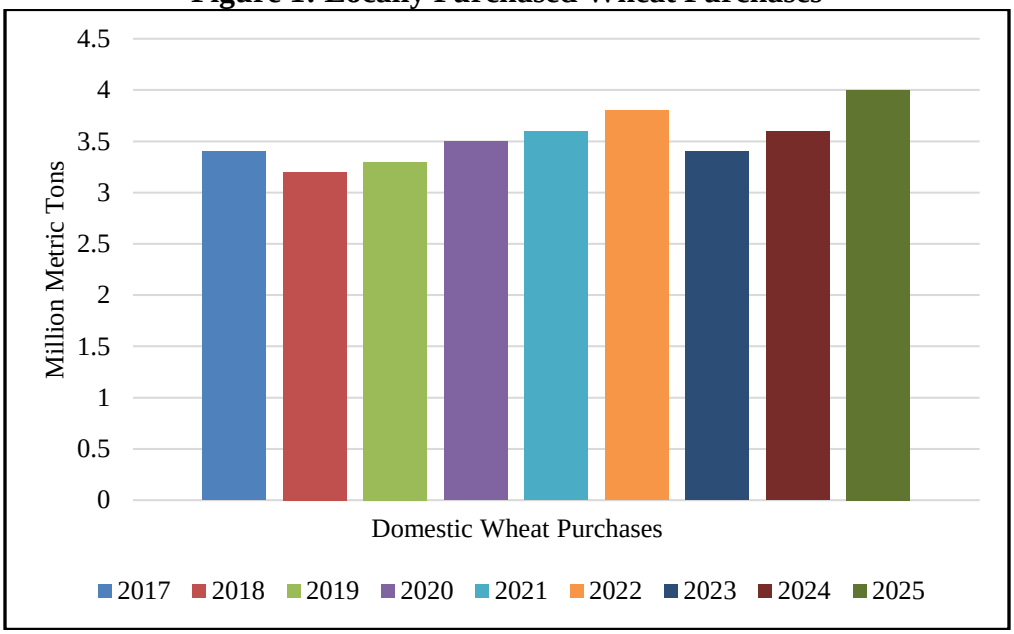
PRODUCTION

Wheat production in MY 2025/26 (July – June) is estimated at 9.3 million metric tons (MMT), up by 1 percent from MY 2024/25. This is due to area harvested, increasing to 1.43 million hectares (HA) compared to 1.4 million HA in MY 2024/25. The increase in area is driven by higher procurement prices which encourage farmers to sow additional areas with wheat. Farmers then decide on the crop area planted for wheat based on the procurement price. In Egypt, wheat is generally planted in November and harvested in April.

The expansion of wheat cultivation is challenged by population growth (which requires double the current cultivated area), limited water resources, land fragmentation, urbanization, competition from other winter crops, and inflated production costs. All factors hinder horizontal expansion (i.e., area planted) efforts. The Agriculture Research Center (ARC) of the Ministry of Agriculture and Land Reclamation (MALR) is consequently focused on increasing vertical expansion (i.e., increasing yields by unit area). These efforts include the use of early-maturing varieties which lead to increasing water use efficiency and achieving high crop intensification rates, increasing the amount of certified wheat seeds distributed to farmers, establishing extension fields across the country showcasing good agricultural practices, and encouraging farmers to increase wheat cultivation using raised bed cultivation method. The raised bed cultivation method reduces water consumption by 25 percent, requires 15 percent less seeds, and produces a more uniform, higher yielding crop.

Domestic Wheat Procurement: Wheat procurement season usually starts in mid-April and lasts until mid-July to allow farmers more time to submit their crop to government collection centers. The amount of locally produced wheat purchased by the GOE was 3.6 MMT in calendar year (CY) 2024 (see Figure 1). The target by the GOE was set at buying 3.5 MMT from local farmers. Post forecasts the GOE collecting some 4 MMT in CY 2025 driven by high procurement price set.

Figure 1: Locally Purchased Wheat Purchases



Source: FAS/Cairo Research

On March 14, 2024, the GOE set a preliminary guaranteed procurement price of 2,000 Egyptian pounds (EGP) per ardeb (1 ardeb=150 kilograms) or $266.6/MT. A guaranteed price for the crop is the minimum purchasing price, which is subject to change per a price increase in the international market.

To incentivize farmers to increase planting next season and to increase the percentage of farmers selling to the government, the Egyptian cabinet increased the guaranteed price again on October 2, 2024. The guaranteed procurement price of locally produced wheat announced in October for MY 2024/25 increased from 2,100 Egyptian pounds (EGP) (or $289/MT) per ardeb to 2,200 EGP per ardeb (or $303/MT) based on quality and moisture.

The General Authority for Supply Commodities is still responsible for domestic wheat procurement for the Egyptian government and does so through four government entities. For CY 2025, the government entities are:

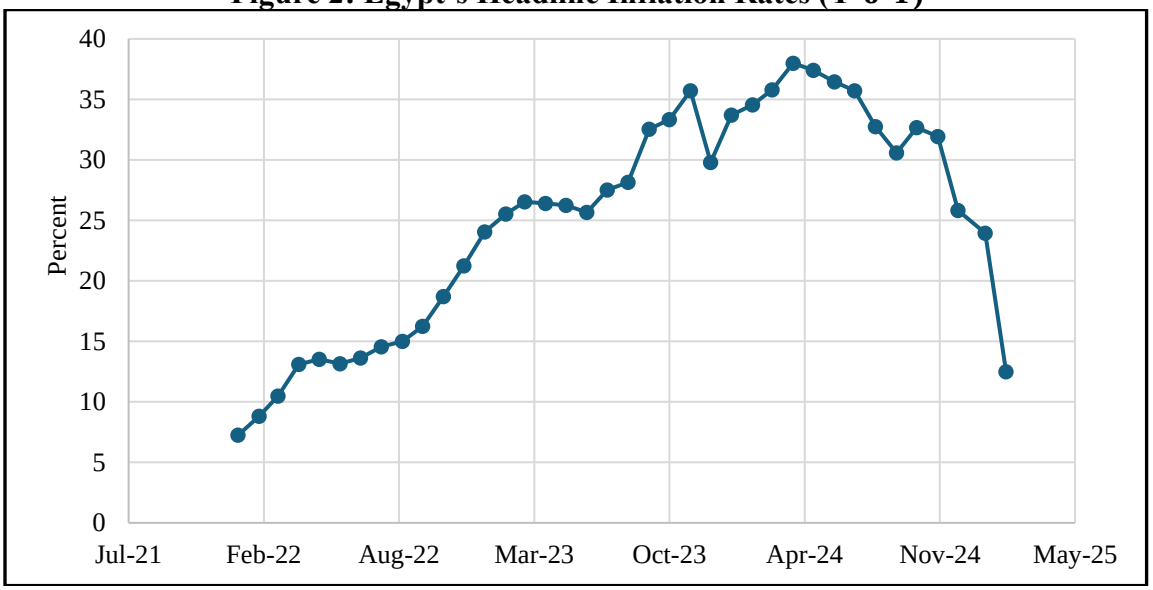
1- The Holding Company for Food Industries
2- The Egyptian Holding Company for Silos and Storage
3- The General Company for Silos and Storage
4- The Egyptian Agriculture Bank

CONSUMPTION

Total wheat consumption in MY 2025/26 is estimated at 20.4 MMT, up by almost 1.5 percent from MY 2024/25. This is due to a 300,000 MT increase in food, seed, and food, seed, and industrial (FSI) consumption. The rise in FSI wheat consumption is primarily attributed to population growth. Egypt has a population of more than 107 million and is expected to reach 124 million according by 2030 to the Central Agency for Public Mobilization and Statistics (CAPMAS).[1] In addition to the local population, Egypt is also host to an estimated ten million migrants.

Post lowered its previous estimate for MY 2024/25 for total wheat consumption by 2.4 percent due to inflationary pressures in Egypt which caused some consumers to lower their consumption of baked products. However, baked products and flat bread produced by the private sector are cheaper items compared to other essential food products. Fortunately, inflationary pressures in Egypt started to slightly decrease, with headline inflation dropping to 12.5 percent in February 2025 compared to 34.5 percent during the same month in 2024 (see Figure 2). The high inflation rate for food has also dropped significantly to 4.2 percent in February 2025, compared to 48.5 percent in February 2024, indicating improved market dynamics.

Figure 2: Egypt's Headline Inflation Rates (Y-o-Y)



Source: Central Bank of Egypt (CBE) & CAPMAS

According to CAPMAS, inflation levels for baked products and cereals have decreased from 47 percent in February 2024 to 7.2 percent in February 2025. This has been particularly evident in products such as cakes, biscuits, wafers, croissants and pastries, as well as European and white flat bread (which is non-subsidized). Although still high, the inflation rate is projected to decline

[1] https://www.sis.gov.eg/Story/197754/CAPMAS-Egypt's-population-officially-reaches-107mn?lang=en-us#:~:text=Egypt's%20population%20officially%20hit%20107,and%20Statistics%20(CAPMAS)%20announced.

by the end of 2025 due to improved access to foreign currency and keeping the Egyptian pound floating.

The private sector mills (which produce 87 percent extraction flour for the bread subsidy program) are not allowed to produce the 72 percent extraction flour produced by other private sector mills. These other private sector mills produce European and white flat bread (non-subsidized) as well as baked products, cakes, biscuits, wafers, croissants, and pastries, etc. Currently there are 5,000 private bakeries and patisseries producing these baked products.

Egyptian Bread Subsidy Program: Egypt's Bread Subsidy Program's operations remain unchanged despite the price change for subsidized bread implemented on June 1, 2024 (i.e., increasing the price for subsidized bread from 5 piasters per loaf to 20 piasters per loaf – marking the first increase in the price of subsidized bread in Egypt in 36 years). Each beneficiary is permitted 150 loaves per month or five loaves per day. The revised price means that the government will charge program participants 16 percent of the cost of production. NOTE: the Egyptian government compensates bakeries for the difference (84 percent) in the production costs. Prior to June 1, 2024, the government subsidized 96 percent of the cost of producing the bread and the beneficiary paid four percent. (For more information, see GAIN: Egypt Increases Price for Subsidized Bread for the First Time in 36 Years).[2]

On March 10, 2025, the Ministry of Supply and Internal Trade (MoSIT) and the Ministry of Health, in collaboration with World Food Program, launched a new initiative to fortify flour used in making subsidized bread with by adding iron and folic acid to prevent the spread of iron deficiency anemia. In addition, fortified bread enriched with nutrients will be provided to 13 governorates with the highest rates of anemia, as iron deficiency anemia is the most common type of anemia in Egypt due to malnutrition.[3] According to the Egyptian Minister of Health, 40 percent of Egyptians suffer from anemia, according to population survey data, stressing that the repercussions of malnutrition are not limited to public health, but extend to affect the economy and society as a whole.[4]

Unused Egyptian Bread Subsidies Can be Reallocated: The subsidy system also continues to permit beneficiaries who consume less than the quota amount to convert their bread savings into points for use on a smart card (1 point = EGP 0.01) The points are redeemable at roughly 40,000 stores – including private grocery stores that MoSIT partners with (in both rural villages and urban cities) and in the 1,300 state-owned subsidized food retail outlets (primarily found in urban areas). Those that save points can use the saved monies on 31 other food and non-food items sold at 20-30 percent discounted prices.[5] According to the government's 2024/25 budget (July-June),

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[2] https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Egypt%20Increases%20Price%20for%20Subsidized%20Bread%20for%20First%20Time%20in%2036%20Years_Cairo_Egypt_EG2024-0013.pdf

[3] https://www.youm7.com/story/2025/3/10/

[4] https://www.youm7.com/story/2025/3/10/

[5] https://www.almasryalyoum.com/news/details/3396918

the point system is expected to cost approximately 2 billion EGP ($40.6 million) in the 2024/25 fiscal budget.[6]

Alternate Egyptian Flour Subsidy Program: In addition to the subsidized bread program, the subsidy program permits beneficiaries to obtain 10 kilograms of subsidized flour per month, per person, at a price of EGP 30 pounds ($0.6), as an alternative to subsidized bread. This is commonly utilized in rural villages in southern Egypt.

Shifting to Cash Subsidy: Approximately 66.7 percent of Egyptians are eligible for the bread subsidy program, which the GOE has tried to reduce in the past. However, with the rise in inflation and bread consumption, it has weakened the government's ability to reduce the program. However, the GOE is seriously considering essential changes to the subsidy system to narrow the budget deficit through shifting to a cash support system. The switch would make citizens reduce their consumption of bread by at least 30 percent according to Post contacts and hence reduce the wheat import bill.

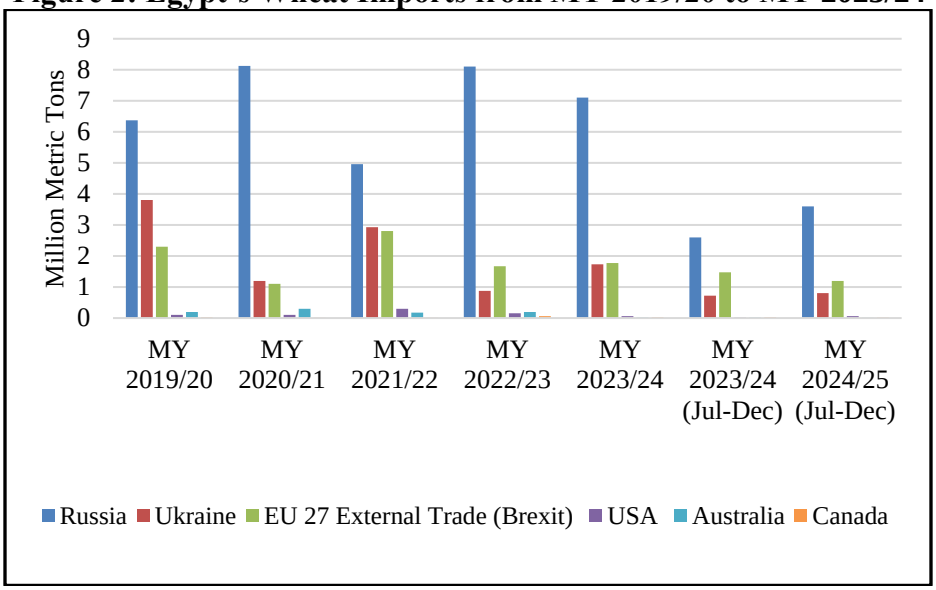
The switch will also increase demand for private sector flour to produce private flat bread and other baked products, which will create new prospects for private flour mills. This makes Egypt one of the most promising markets in this field. In fiscal year (FY) 2024/25 Egypt allocated almost 134 billion EGP (2.8 billion USD) for food subsidies, with 98 billion EGP (2.03 billion USD) earmarked for the bread subsidy.[7]

TRADE

Egypt's wheat imports in MY 2025/26 (July – June) are estimated at 13.0 MMT, like the previous marketing year. Post increased its previous wheat import estimate in MY 2024/25 by 4 percent amid forex availability and increased flour exports neighboring countries. Both factors had a major impact on increased wheat imports in general, and Russian wheat in particular, due to its competitive pricing compared to other origins. Private sources have noted that Russian wheat exports from July 2024 – February 2025 are approximately 7 MMT. The largest supplier of milling wheat to Egypt during the past five marketing years were Russia (34.6 MMT), Ukraine (10.4 MMT), and EU-27 (9.64 MMT) (see Figure 2).

[6] 1 USD = 50.7 EGP
[7] 1 USD = 48.2 in July 2024

Figure 2: Egypt's Wheat Imports from MY 2019/20 to MY 2023/24



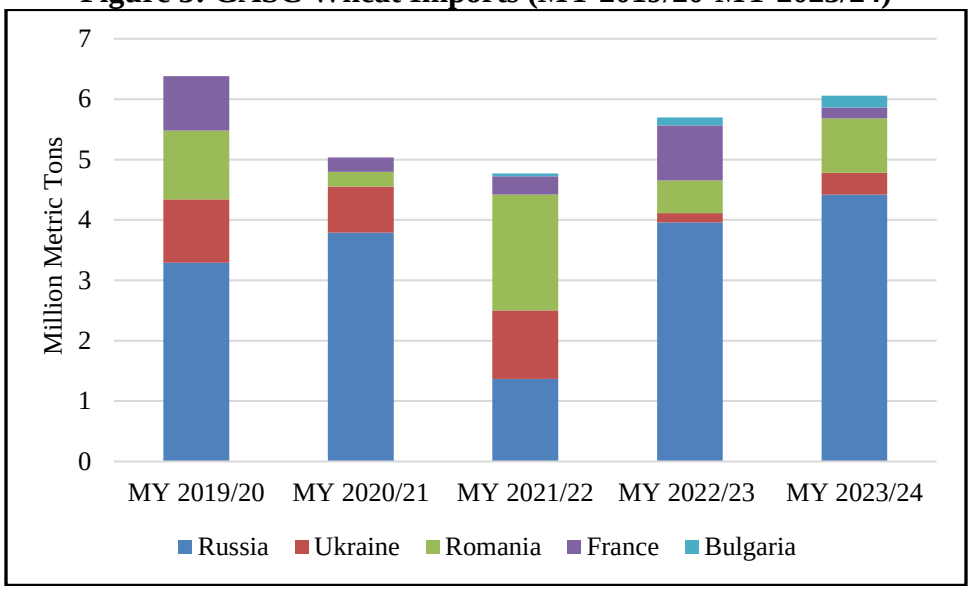
Source: Trade Data Monitor LLC

During MY 2024/25 GASC tenders resulted in purchasing 3.1 MMT of milling wheat to support the bread subsidy program. Of this amount, 1.3 MMT was purchased from Russia, 660,000 MT from Romania, 600,000 MT from Ukraine, 400,000 MT from Bulgaria and 120,000 MT from France. The last milling wheat tender conducted by GASC was on November 4, 2024, in which GASC made a purchase of 290,000 MT of milling wheat from Romania, Ukraine and Bulgaria.

In the past five years, the private industry has increased its market share of wheat imports as it has increased its production of flour for exports and distribution to private bakeries, café and patisserie producing high quality products. The private milling industry became the major importer of U.S wheat. Since 2020, private sector imports of U.S wheat amounted to 527,148 MMT used for milling high quality flour for various types of baked products.

During the past five marketing years, public wheat imports by GASC amounted to 27.4 MMT. The largest supplier of milling wheat to Egypt's GASC during the past five marketing years were Russia (16.83 MMT), Romania (4.74 MMT), Ukraine (3.46 MMT) followed by France (2.53 MMT) (see Figure 3).

Figure 3: GASC Wheat Imports (MY 2019/20-MY 2023/24)

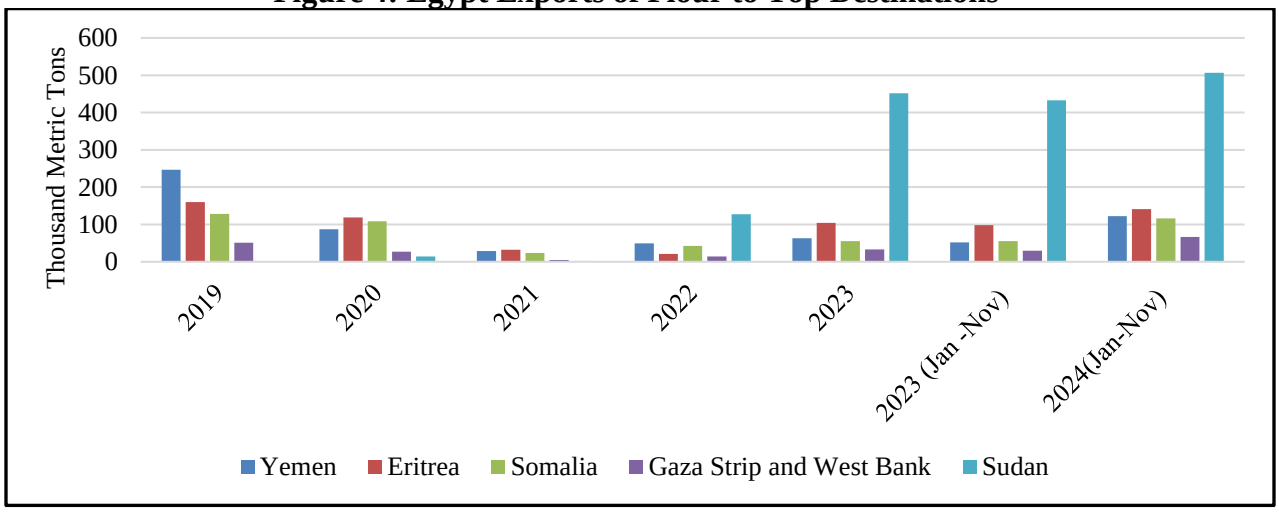


Source: Ministry of Supply and Internal Trade

Wheat Flour Exports

Estimated wheat flour exports in MY 2025/26 amount to 1.7 MMT, up by 20 percent from Post's estimate in MY 2024/25. Egypt is a key supplier of wheat flour to many African and Middle Eastern countries and has significantly expanded its wheat flour exports to the region, especially in countries which saw conflicts and faced a halt of their production capacities. In the past five years, Egypt's top destinations for wheat flour exports include Sudan, Eritrea, Yemen, Somalia, Djibouti, Syria, and the Palestinian Authorities (West Bank and Gaza) (See Figure 4). In addition to increased milling capacity, Egypt has been able to increase exports due to competitive prices and geographic proximity to these countries.

Figure 4: Egypt Exports of Flour to Top Destinations



Source: Trade Data Monitor LLC

Media Reports the Future of Egypt for Sustainable Development Replaces GASC:
Since 1968, GASC had been the Egyptian government's primary procurement arm for imported wheat. However, according to media sources, the Future of Egypt for Sustainable Development **(**FoESD), also known as Mostaqbal Misr, took over the procurement arm of GASC's operations in late 2024. The update was revealed via media sources which reported on a December 6, 2024, letter to the Russian Minister of Agriculture which noted: "the appointment of Mostaqbal Misr… as the exclusive importer of food items into Egypt through tenders and private deals, assuming the responsibilities previously held by GASC."[8] The letter added that FoESD is 'the only government agency that has the exceptional powers to organize international tenders and contract by direct order to purchase wheat and other food products to meet the needs of the Arab Republic of Egypt.'[9]

STOCKS

Ending stocks in MY 2025/26 are estimated at 4.5 MMT, up by 4.64 percent from Post's MY 2024/25 estimate due to steady, high imports and a slight increase in production.

Wheat	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jul 2023		Jul 2024		Jul 2025	
Egypt	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	1350	1350	1400	1400	0	1430
Beginning Stocks (1000 MT)	4840	4840	3705	3705	0	4305
Production (1000 MT)	8870	8870	9200	9200	0	9300
MY Imports (1000 MT)	12346	12346	12500	13000	0	13000
TY Imports (1000 MT)	12346	12346	12500	13000	0	13000
TY Imp. from U.S. (1000 MT)	57	0	0	0	0	0
Total Supply (1000 MT)	26056	26056	25405	25905	0	26605
MY Exports (1000 MT)	1851	1851	2000	1500	0	1700
TY Exports (1000 MT)	1851	1851	2000	1500	0	1700
Feed and Residual (1000 MT)	1300	1300	1100	1100	0	1100
FSI Consumption (1000 MT)	19200	19200	19000	19000	0	19300
Total Consumption (1000 MT)	20500	20500	20100	20100	0	20400
Ending Stocks (1000 MT)	3705	3705	3305	4305	0	4505
Total Distribution (1000 MT)	26056	26056	25405	25905	0	26605
Yield (MT/HA)	6.5704	6.5704	6.5714	6.5714	0	6.5035
(1000 HA) ,(1000 MT) ,(MT/HA) MY = Marketing Year, begins with the month listed at the top of each column TY = Trade Year, which for Wheat begins in July for all countries. TY 2025/2026 = July 2025 - June 2026						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

[8] https://www.spglobal.com/commodity-insights/en/news-research/latest-news/agriculture/120924-egypt-appoints-mostakbal-misr-as-exclusive-food-importer-replacing-gasc
[9] https://www.spglobal.com/commodity-insights/en/news-research/latest-news/agriculture/120924-egypt-appoints-mostakbal-misr-as-exclusive-food-importer-replacing-gasc

CORN

PRODUCTION

Post forecasts Egypt's corn production in MY 2025/26 (October-September) at 7.25 MMT, up by approximately 3.6 percent from the MY 2024/25 production estimate of 7.0 MMT. The rise in production is due to an anticipated increase in the area harvested—forecasted to reach 950,000 hectares in MY 2025/26, up some 30,000 hectares from the previous marketing year. Furthermore, the positive outlook for poultry feed consumption will continue to encourage many farmers to plant more corn during the summer of 2025. Corn is a major raw material in livestock feed. Post forecasts MY 2025/26 yields to slightly increase by 0.3 percent as farmers becoming more experienced in implementing integrated pest management programs to manage *fall army worm*, a major corn pest in recent years.

The current ARC strategy for increasing corn yields incorporates improved extension services, the use of higher-yielding one-way and three-way cross hybrids, encouraging growers to plant during ideal times, and improving marketing channels. In addition, increasing the number of demonstration fields and showcasing new corn varieties as well will help obtain higher yields.

CONSUMPTION

Post forecasts corn consumption in MY 2025/26 at 15.8 MMT up from MY 2024/25 of an estimated 15.6 MMT on account for the growth in the poultry sector amid availability of forex and increase in feed supply. The poultry sector is the major driver of feed and corn consumption. Egypt's feed mills produce poultry feed-mix consisting of 70 percent yellow corn, 19.4 percent soybean meal, 3.4 percent wheat bran, and 1.9 percent broiler concentrates (fish or meat meals) in addition to minerals and vitamins.

Post anticipates the poultry sector's feed consumption to grow by almost 2.3 percent in MY 2025/26, as large companies in the poultry feed sector (especially those that have integrated operations – broiler, mothers, grandparents, slaughterhouses and chicks) started to utilize their capacities efficiently which was driven by lower feed production cost amid availability of forex that gave a boost to feed raw material imports. Some of these companies are starting to invest in new projects for chicks, broiler and egg production.

Similarly, a reduction in feed prices encouraged small and medium sized broiler producers to resume their operations for either egg production or entering new broilers breeding cycles. The increase in corn consumption is also based on several factors including lower feed prices, an increase in supply, improved veterinary treatments leading to better poultry disease management poultry, and enhanced production capabilities. These favorable circumstances were attributed mainly to the availability of forex in banking channels and the ability of traders and companies to resume import operations of feed raw material.

Before 2023, the Egyptian poultry sector produced 1.4 billion birds and 14 billion eggs annually. These numbers declined by 40 percent in 2023 due to a lack of forex which impacted small and

medium size businesses (in particular) which halted their operations due to rising production costs. The industry is now picking up, although most have not reached the same production level as before; however, the outlook seems positive, and the stability and availability of forex is encouraging more businesses to invest in the sector.

The government has continued to expand the approvals of licenses for livestock, poultry, and fodder projects, through the livestock and poultry sector. This comes as part of the State's plan to expand local production of milk and red and white meat, thus increasing their supply on the market to reduce imports, while also supporting small breeders and small enterprises.

Egypt is also a leading aquaculture producer in Africa, producing almost 1.6 MMT of fish annually. Aquaculture accounts for roughly 80 percent of Egypt's fish production, primarily via private farms. However, Egyptian aquaculture faces challenges, including (but not limited to) competition for water, limited awareness of fish disease management practices, and a lack of adequate processing facilities. Despite these challenges, a future increase in production and demand is anticipated, due to continued population growth and economic recovery. Sustainable feed production practices, increased utilization of water efficiency innovations, as well as enhanced farming practices and biosecurity measures for improved fish health are all expected to help Egyptian fish farms continue to expand their productivity.

The aquaculture feed market demand is forecast to exceed 2.0 MMT by 2032. To meet the increase in feed required, significant investments in aquaculture feed have taken place with more investments targeting marine species feed. Current fish feed demand ranges between 1.4-1.5 MMT annually. Aquaculture's major dietary energy sources include 20-25 percent yellow corn, 20-30 percent wheat bran, 10-25 percent rice bran, and 1-5 percent vegetable oils. This feed mix formulation depends on the protein and energy contents of the feed, as well as the availability and price of the ingredients, including fish species and their sizes. (For more information, see GAIN: Egyptian Aquaculture Industry – 2025 Update)[10]

The Egyptian wet milling sector consumes 1-1.5 MMT of corn annually. There are five major corn wet milling companies in Egypt. The largest of these milling companies accounts for over 70 percent of total wet milling in Egypt and has been Egypt's leading importer of corn for the past five years. The wet milling industry continually looks for new processes to improve their overall operations for better yields and profitability.

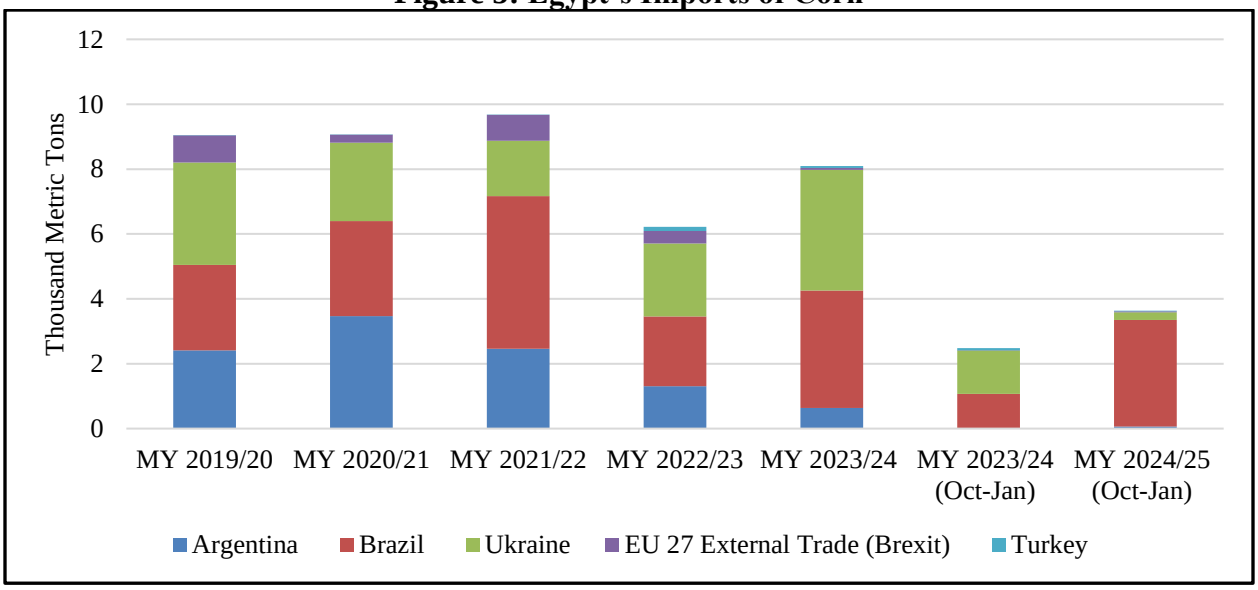
TRADE

Post forecasts Egypt's corn imports in MY 2025/26 at 8.7 MMT, up by 200,000 MT from Post's estimate for MY 2024/25. Post is also revising MY 2024/25 corn import estimates up to 8.5 MMT, due to the availability of forex increasing the facilitation of imports, allowing for more corn and livestock feed supply.

[10] https://www.fas.usda.gov/data/egypt-egyptian-aquaculture-industry-2025-update

Egypt's yellow corn production covers less than 40 percent of its feed demand needs, while imports supplement the rest of the feed industry. Egypt sources yellow corn from international markets and top suppliers of corn to Egypt during the past five marketing years were Brazil (16.0 MMT), Ukraine (13.2 MMT), and Argentina (10.3 MMT) (see Figure 5). Marketing year 2024/25 corn imports have increased by 46.36 percent against the same period in MY 2023/24 due to forex availability and the growth in the poultry sector.

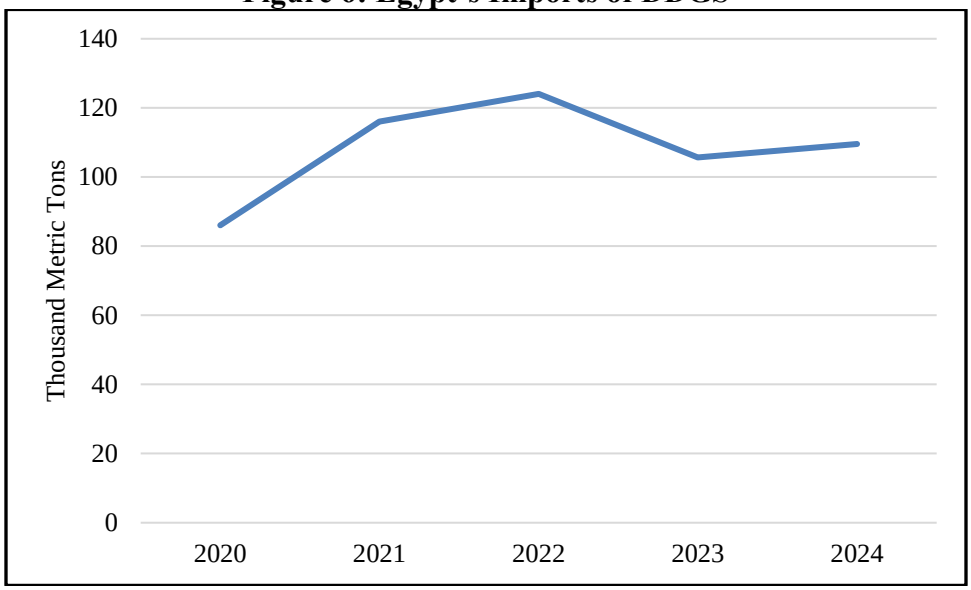
Figure 5: Egypt's Imports of Corn



Source: Trade Data Monitor, LLC.

Dried Distillers' Grains with Solubles (DDGS) Imports: Egypt's DDGS imports during CY 2020-2024 (Jan – Dec) amounted to 541,354 MT (see Figure 6). The United States accounted for 86.2 percent of Egypt's DDGS imports during the past five years, and the remaining came from Brazil in 2022 and 2023. Dried distillers' grains with solubles are a good source of protein and vitamins for poultry and other livestock. It also can help improve the digestive health of animals since it is a good fiber. Dried distillers' grains with solubles can be used as a complete feed or as a supplement to other feed ingredients.

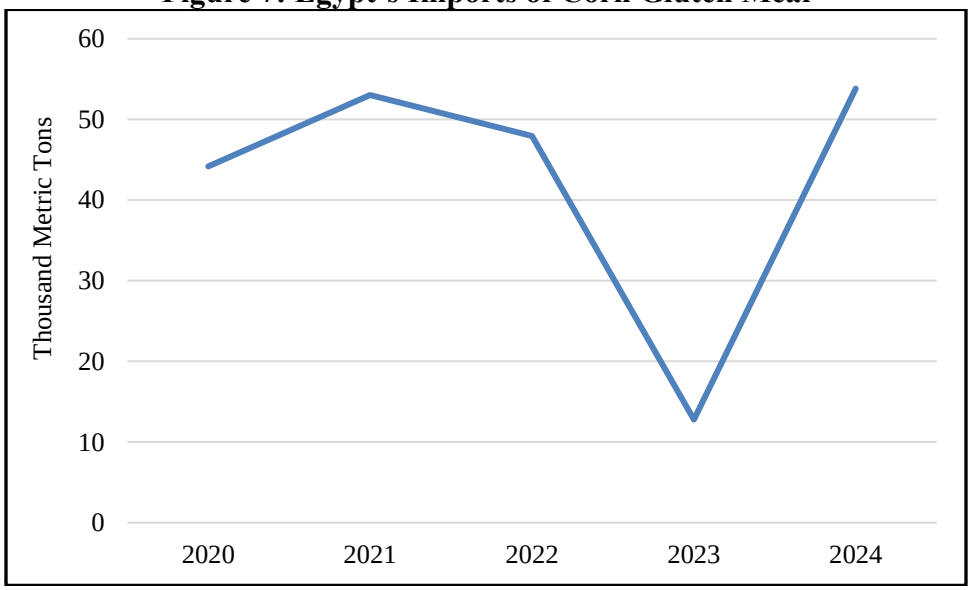
Figure 6: Egypt's Imports of DDGS



Source: Central Administration for Plant Quarantine - Ministry of Agriculture

Corn Gluten Meal (CGM): Egypt's corn gluten meal imports during the past five years amounted to 211,764 MT (see Figure 7). The United States accounted for 99.2 percent of Egypt's corn gluten meal imports during the past five years. In Egypt, CGM contains 60 percent protein and is used as a supplement in feed for livestock and poultry.

Figure 7: Egypt's Imports of Corn Gluten Meal



Source: Central Administration for Plant Quarantine -Ministry of Agriculture

STOCKS

Post forecasts Egypt's corn stocks in MY 2025/26 at 1.4 MMT, up by 11.2 percent from Post's estimate in MY 2024/25 due to an anticipated increase in imports and slight increase in local production.

Corn	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 2023		Oct 2024		Oct 2025	
Egypt	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	950	950	920	920	0	950
Beginning Stocks (1000 MT)	1511	1511	1429	1429	0	1328
Production (1000 MT)	7200	7200	7000	7000	0	7250
MY Imports (1000 MT)	8019	8019	8400	8500	0	8700
TY Imports (1000 MT)	8019	8019	8400	8500	0	8700
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	16730	16730	16829	16929	0	17278
MY Exports (1000 MT)	1	1	1	1	0	1
TY Exports (1000 MT)	1	1	1	1	0	1
Feed and Residual (1000 MT)	12800	12800	12800	13100	0	13300
FSI Consumption (1000 MT)	2500	2500	2600	2500	0	2500
Total Consumption (1000 MT)	15300	15300	15400	15600	0	15800
Ending Stocks (1000 MT)	1429	1429	1428	1328	0	1477
Total Distribution (1000 MT)	16730	16730	16829	16929	0	17278
Yield (MT/HA)	7.5789	7.5789	7.6087	7.6087	0	7.6316
(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

PRODUCTION

Post forecasts Egypt's milled rice production and area harvested in MY 2025/26 (October – September) unchanged from Post's estimates in MY 2024/25 despite Egypt's Ministry of Water Resources and Irrigation's (MWRI) decree designating rice areas in certain governorates in the Delta. According to Ministerial Decree No. 26, published in Egyptian Gazette on January 19, 2025, cultivation of rice is only designated in nine governates (totaling 1,074,200 feddans (~451,164 ha), and farmers can face penalties for growing rice or other crops with high water needs in areas other than those specified. Despite penalties, farmers tend to take the risk and increase areas beyond the allotted measures due to ease of cultivation, ease of storage of rice in paddy form, and profitability.

Four new varieties of Egyptian rice have been registered, including Giza 83, Sakha Super 301, Sakha Super 302, and Sakha Super 303. These varieties can withstand heat stress, salinity, and are climate resilient. Seeds of such varieties are expected to be distributed to farmer's next season. The coverage rate of certified rice seeds is about 65 percent of the total cultivated area. The Ministry's plan aims to achieve full coverage of certified seeds, and the current rates are reasonable.

Rice cultivation in the Delta is critical to limit seawater intrusion into the Delta lands and prevent salinization of the soil. Early maturing rice varieties developed by ARC grow in three months using 9,000-10,000 cubic meters of water per hectare, compared with 14,000-15,000 cubic meters of water per hectare for other rice varieties. Post forecasts demand for rice cultivation in the long term to increase with cultivars taking shorter periods to grow from planting to harvest, and higher profits generated by farmers.

CONSUMPTION

Post forecasts Egypt's rice consumption and residual at 4.0 MMT in MY 2025/26, down from the previous marketing year due to availability of more starch products such as potatoes and pasta which tends to be more attractive to consumers due to price competitiveness. Rice consumption in Egypt varies across different geographical locations, with higher rates in the northern Delta and coastal cities where the traditional plate consumed in these areas is fish and rice.

The rice value chain is primarily privately owned, which sets the price based on supply and demand. Because of the ease of storing rice in paddy format, some farmers or traders tend to store the crop before major religious holidays to spike prices in the market to increase profits. As soon as consumers shift to more affordable carbohydrate sources (i.e. lower priced pasta or potato) especially in greater Cairo, rice supply increases and becomes available again with reduced prices.

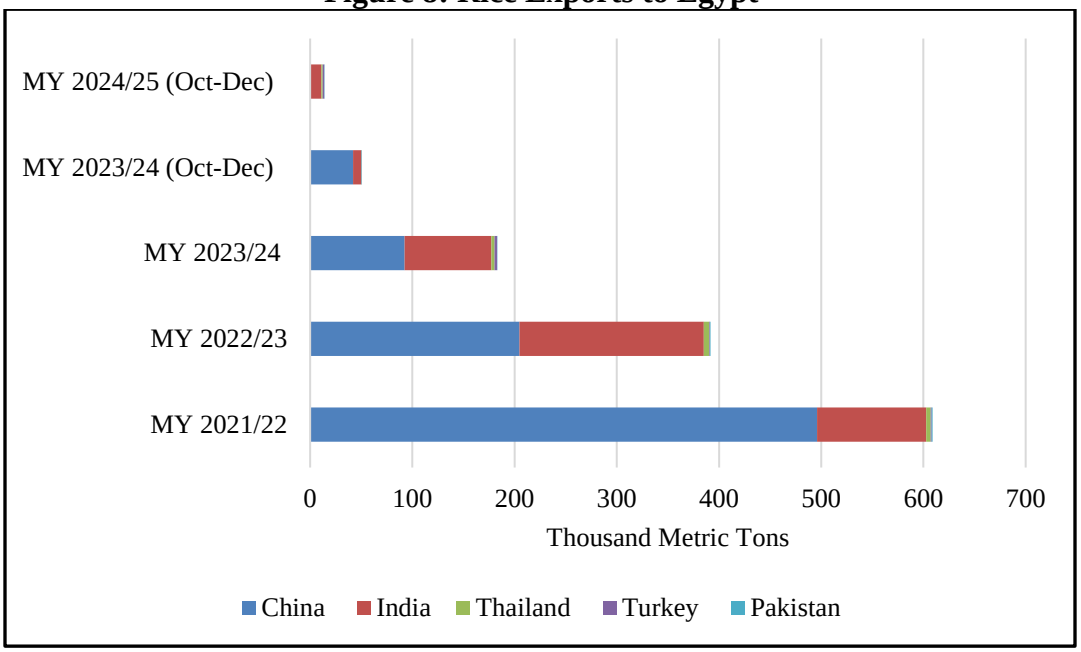
Current rice prices in government affiliated stores are 22.0 EGP/Kg for packaged rice, while prices of packaged rice in the retail market hover between 25-37 EGP/Kg depending on brand, grade and quality. Paddy rice prices have declined by 13 percent as compared to prices in February 2024. Similarly, milled rice prices in the domestic market have also declined by roughly 16.6 percent during the same period.

TRADE

Post forecasts Egypt's rice imports in MY 2025/26 at 185,000 MT, unchanged from Post's estimate in MY 2024/25 due to similar production levels, albeit slightly lower consumption.
In the past five years, Egyptian rice imports have declined sharply as Egypt's domestic production has been sufficient for short and medium-grain rice, and as the Egyptian government has decreased its amount of rice tenders. Imports are primary focused on rice varieties that are not grown in Egypt. For Egyptians seeking a healthier lifestyle, Egyptian consumers tend to purchase more imported varieties such as long-grain, basmati, and jasmine rice due to less starch content than short or medium-grain rice. Therefore, imported rice primarily comes from China (long-grain), India (basmati and long-grain), with smaller quantities from Thailand (jasmine variety), Turkey, and Pakistan. During the past five marketing years, Egypt's rice imports from China (793,200 MT) India (371,900 MT), Thailand (12,800 MT), Turkey (4,240MT) and Pakistan (1,873MT) (see Figure 8).

On February 2, 2025, the Egyptian Customs Authority issued Export Circular No. (3) of 2025, regarding the continued suspension of rice exports, in accordance with the Egyptian Ministry of Trade's decision No. 722 of 2016 regarding the suspension of the export of all types of rice, including broken rice under customs item 1006.[11] This export ban has been renewed multiple times over eight years in order to preserve stock for the local market.

Figure 8: Rice Exports to Egypt



Source: Trade Data Monitor

STOCKS

Post forecasts Egypt's ending rice stocks in MY 2025/26 to reach 569,000 MT, up from the previous marketing year's estimate of 489,000 MT. The increase is due anticipated decrease in consumption in MY 2025/26.

[11] https://almalnews.com/%d8%a7%d9%84%d8%ac%d9%85%d8%a7%d8%b1%d9%83-%d8%aa%d8%a4%d9%83%d8%af-%d8%a7%d8%b3%d8%aa%d9%85%d8%b1%d8%a7%d8%b1-%d9%82%d8%b1%d8%a7%d8%b1-%d9%88%d9%82%d9%81-%d8%aa%d8%b5%d8%af%d9%8a%d8%b1-%d8%a7/

Rice, Milled	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 2023		Oct 2024		Oct 2025	
Egypt	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	630	630	670	670	0	670
Beginning Stocks (1000 MT)	600	600	509	509	0	489
Milled Production (1000 MT)	3780	3780	3900	3900	0	3900
Rough Production (1000 MT)	5478	5478	5652	5652	0	5652
Milling Rate (.9999) (1000 MT)	6900	6900	6900	6900	0	6900
MY Imports (1000 MT)	184	184	175	185	0	185
TY Imports (1000 MT)	155	155	175	185	0	185
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	4564	4564	4584	4594	0	4574
MY Exports (1000 MT)	5	5	5	5	0	5
TY Exports (1000 MT)	5	5	5	5	0	5
Consumption and Residual (1000 MT)	4050	4050	4100	4100	0	4000
Ending Stocks (1000 MT)	509	509	479	489	0	569
Total Distribution (1000 MT)	4564	4564	4584	4594	0	4574
Yield (Rough) (MT/HA)	8.6952	8.6952	8.4358	8.4358	0	8.4358

(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

Attachments:

No Attachments