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# **Report Name:** Grain and Feed Update

**Country:** Egypt

**Post:** Cairo

**Report Category:** Grain and Feed

**Prepared By:**

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**Report Highlights:**

FAS/Cairo (Post) forecasts Egypt's wheat imports in marketing year 2025/26 at 12.7 MMT, up from the previous marketing year due to higher consumption driven by population growth. Egypt's wheat production in MY 2025/26 is also forecasted up from the previous marketing year. Egypt's rice production has expanded significantly in response to lower costs of production and higher profitability, while corn production has fallen, due to less area planted. Consequently, corn imports are forecast higher to offset the production shortfall, with U.S. corn shipments returning to the Egyptian market on price competitiveness and high quality.

# WHEAT

## PRODUCTION

Egypt's wheat production for marketing year (MY) 2025/26 (July-June) is projected at 9.2 million metric tons (MMT), a slight increase from MY 2024/25, driven by expansion in harvest area of 30,000 hectares (HA). The growth in harvest area stems from higher procurement prices and the Government of Egypt's (GOE) initiatives to encourage both horizontal and vertical expansion in wheat cultivation. For example, the Agriculture Research Center (ARC) is promoting raised bed cultivation with early-maturing, high-yield wheat varieties that cut water usage by 25 percent, reduce seed consumption by 15 percent, and improve crop uniformity and yields. Additionally, ARC is expanding the distribution of certified seeds and setting up demonstration fields to highlight best practices for new wheat varieties. Post is also adjusting MY 2024/25 area harvested and production down due to dissatisfaction of many farmers with the preliminary guaranteed procurement price offered before the planting season.

**Domestic Wheat Procurement:** In Egypt, wheat is typically planted in November and harvested in April. The amount of land planted depends on the government's procurement prices. High government procurement prices have incentivized farmers to grow more wheat and sell it to government entities. On March 19, 2025, the Egyptian Minister of Supply and Internal Trade issued "Ministerial Decision No. 46 for 2025," which set the voluntary wheat procurement season from mid-April to mid-August, offering guaranteed prices ranging from $277.2/MT to $290.4/MT based on quality and moisture.

As of August 15, 2025, the GOE has procured approximately 3.94 MMT of milling wheat, along with smaller quantities of durum wheat and seeds for wheat breeding programs. Ministerial Decision No. 46 also established committees at collection sites to oversee wheat storage and banned the unauthorized transportation of wheat without permits (See [GAIN Report: Egypt's Domestic Wheat Procurement – 2025](https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Egypt%27s%20Domestic%20Wheat%20Procurement%20--%202025_Cairo_Egypt_EG2025-0023)).[1] The General Authority for Supply Commodities (GASC) remains the primary entity responsible for domestic wheat procurement, and works via five government entities:

1. The Holding Company for Food Industries
2. The Holding Company for Silos and Storage
3. The Egyptian Agriculture Bank
4. The General Company for Silos and Storage
5. The Future of Egypt for Sustainable Development

## CONSUMPTION

Total wheat consumption in MY 2025/26 is estimated at 20.3 MMT, slightly up from MY 2024/25 due to a 300,000 MT increase in 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 108 million and is expected to reach 124 million according by 2030 to the Central

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[1] https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Egypt%27s%20Domestic%20Wheat%20Procurement%20--%202025_Cairo_Egypt_EG2025-0023

Agency for Public Mobilization and Statistics (CAPMAS).[2] In addition to the local population, Egypt is also host to an estimated ten million migrants.

Post is revising its previous estimate for total wheat consumption during MY 2024/25 slightly down due to inflationary pressures in Egypt that led some consumers to reduce their intake of baked goods. Despite this, baked goods and flat bread produced by the private sector remain relatively affordable compared to other essential food items. Encouragingly, inflationary pressures in Egypt have begun to ease, with headline and food inflation declining, reflecting improved market conditions.

Similarly, inflation levels for baked products and cereals have decreased. 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 and align with the Central Bank's target of 5-9 percent by late 2026, while the Egyptian pound is forecasted to stabilize.

**Egyptian Bread Subsidy Program:** Egypt's bread subsidy program remains unchanged with each beneficiary allowed 150 loaves per month. The value of food commodity subsidies has more than tripled in the past ten years, reaching 160 billion Egyptian pounds (EGP) in the fiscal year (FY) 2025/2026 draft budget, from the 39.4 billion EGP in the FY 2014/2015 final budget. Meanwhile, the number of beneficiaries for subsidized bread has reached 69 million, with the GOE bearing more than 85 percent of the cost of producing a loaf of bread. The current cost of producing one subsidized loaf of bread is 1.35 EGP, while citizens pay only 0.20 piasters.

## TRADE

Egypt, with a population of 108 million, requires 20 MMT of wheat annually. Its growing population drives a steady increase in demand. While Egypt produces a significant amount of wheat domestically, this covers only 50-55 percent of its needs, necessitating substantial imports. As a result, Egypt remains one of the world's largest wheat importers. This reliance stems from limited domestic production and a robust subsidy program that ensures affordable bread for most of the population. The country is highly price-sensitive and depends heavily on Russian and Ukrainian wheat due to its competitive pricing, lower freight costs, and faster delivery to Egyptian ports compared to other suppliers.

During the past three years, the private industry has increased its market share of wheat imports, as it has increased its production of flour exports to regional markets and distributed to private bakeries and cafes producing high quality products. From January to August 2025, private sector wheat imports gained a significant share in the Egyptian market, accounting for 69 percent of total imports due to improved economic conditions and competitive prices in the international market.

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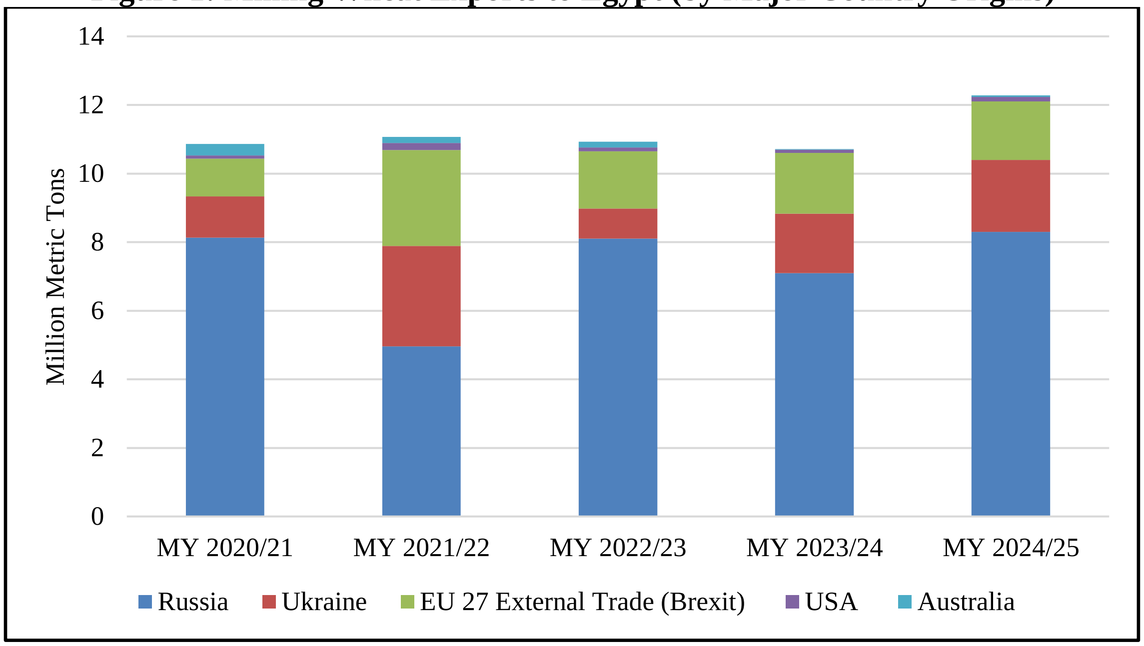
[2] https://www.sis.gov.eg/Story/211469/CAPMAS-Egypt's-population-reaches-108-million?lang=en-us#:~:text=Egypt's%20population%20reached%20108%20million,Saturday%2016%2F8%2F2025.

Egypt's wheat imports in MY 2025/26 are projected at 12.7 MMT, up by 1.6 percent previous marketing year. Post is revising its previous estimate for total wheat trade in MY 2024/25 down by 0.5 percent due to fewer imports by the public sector for subsidized bread. The largest supplier of milling wheat to Egypt during MY 2024/25 were Russia (8.3 MMT), Ukraine (2.1 MMT), and the European Union (EU) (1.74 MMT) (see Figure 1).

**Figure 1: Milling Wheat Exports to Egypt (by Major Country Origins)**




*Source: Tarde Data Monitor LLC*

**Wheat Flour Exports**

Estimated wheat flour exports in MY 2025/26 amount to 1.0 MMT, down by 23 percent from Post's estimate in MY 2024/25. The estimated decrease adheres to Ministerial Resolution No. 273 (June 2025), which introduced stricter export requirements, mandating full deposit of dollar proceeds in Egyptian banks prior to shipment of the product. This policy shift aims to balance domestic market needs with export volumes of wheat flour.

Furthermore, in the past few years, Egypt has continued to increase its position as a key supplier of wheat flour to many African and Middle Eastern countries, especially in countries which have faced conflicts (such as Gaza and Sudan) and as a result, impacted their production capacities. However, as wheat milling operations in Sudan have started to resume, Egypt's wheat flour exports to Sudan have started to decline.

Post is also revising its previous estimate for wheat flour exports in MY 2024/25 downward by 13.3 percent as per the implementation of Ministerial Resolution No. 273 (June 2025) and resumption of milling operations in Sudan. However, Egyptian exporters are seeking new markets in Africa to fill the gap from Sudan, as well as markets where Türkiye previously dominated wheat flour exports.

**STOCKS**

Ending stocks in MY 2025/26 are estimated at 4.5 MMT, up by 15.3 percent from Post's MY 2024/25 estimate due to steady, high imports and an increase in local production for its bread subsidy program.

| **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 | 1300 | 1430 | 1330 |
| **Beginning Stocks** (1000 MT) | 4840 | 4840 | 3799 | 3705 | 3199 | 3905 |
| **Production** (1000 MT) | 8870 | 8870 | 9200 | 9000 | 9300 | 9200 |
| **MY Imports** (1000 MT) | 12440 | 12346 | 12500 | 12500 | 13000 | 12700 |
| **TY Imports** (1000 MT) | 12440 | 12346 | 12500 | 12500 | 13000 | 12700 |
| **TY Imp. from U.S.** (1000 MT) | 92 | 0 | 134 | 134 | 0 | 150 |
| **Total Supply** (1000 MT) | 26150 | 26056 | 25499 | 25205 | 25499 | 25805 |
| **MY Exports** (1000 MT) | 1851 | 1851 | 2300 | 1300 | 2000 | 1000 |
| **TY Exports** (1000 MT) | 1851 | 1851 | 2300 | 1300 | 2000 | 1000 |
| **Feed and Residual** (1000 MT) | 1300 | 1300 | 1000 | 1000 | 1000 | 1000 |
| **FSI Consumption** (1000 MT) | 19200 | 19200 | 19000 | 19000 | 19000 | 19300 |
| **Total Consumption** (1000 MT) | 20500 | 20500 | 20000 | 20000 | 20000 | 20300 |
| **Ending Stocks** (1000 MT) | 3799 | 3705 | 3199 | 3905 | 3499 | 4505 |
| **Total Distribution** (1000 MT) | 26150 | 26056 | 25499 | 25205 | 25499 | 25805 |
| **Yield** (MT/HA) | 6.5704 | 6.5704 | 6.5714 | 6.9231 | 6.5035 | 6.9173 |
| | | | | | | |

(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

# CORN

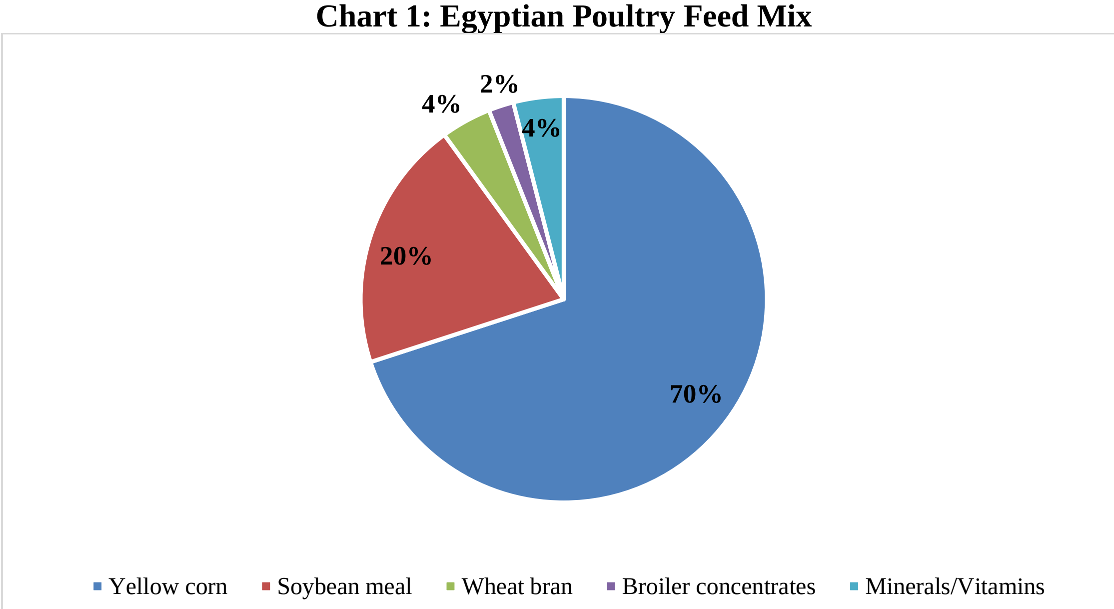
## PRODUCTION

Estimated MY 2025/26 (October – September) corn production is 6.7 MMT, down from Post's earlier estimate by almost 7.6 percent. The decrease in production is from excessive heat during the growing season and high insect pressure (mainly the fall army worm) causing lower kernel counts and reduced yield throughout the region from July to August. Declining domestic corn prices before the planting season and inflated prices of inputs caused area harvested in MY 2025/26 to decrease by 10.5 percent compared to Post's previous estimate. Despite these challenging constraints, yields per hectare were up by almost 3.7 percent from the previous marketing year, mainly due to increased commercial farms and government desert reclamation projects, both utilizing modern irrigation systems and using high yielding hybrids.

## CONSUMPTION

Post forecasts corn consumption in MY 2025/26 at 16.5 MMT, up by 4.4 percent from Post's MY 2024/25 estimate on account of the growth in the poultry sector amid the availability of forex and an 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 approximately 70 percent yellow corn, 20 percent soybean meal, 4 percent wheat bran, and 2 percent broiler concentrates (fish or meat meals) in addition to minerals and vitamins (see Chart 1).

**Chart 1: Egyptian Poultry Feed Mix**




*Source: FAS/Cairo Research*

Egypt's poultry sector is projected to grow by 4 percent in MY 2025/26, driving higher feed consumption. Growth is fueled by lower feed production costs and improved access to foreign currency, which has boosted imports of feed raw materials. Large integrated companies are operating more efficiently and investing in new projects, while lower feed prices have encouraged small and medium-sized producers to resume operations. Moreover, the positive outlook in feed consumption is reinforced by new government licenses for livestock and poultry projects aimed at increasing local production and reducing imports.

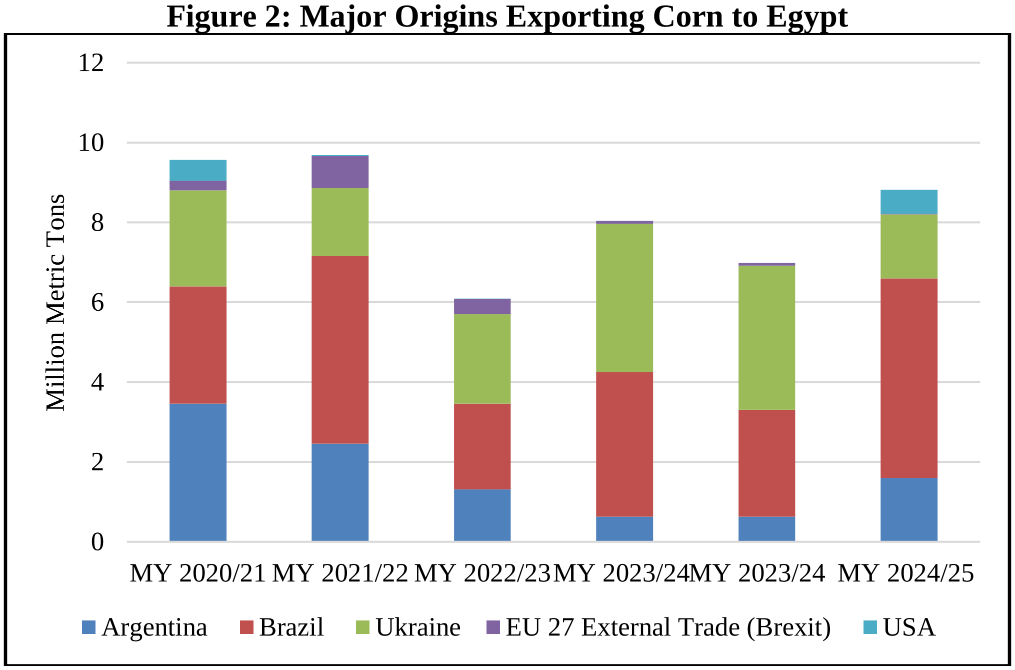
Egypt's aquaculture sector produces about 1.6 MMT of fish annually. Despite challenges such as water competition and limited disease management, the sector is expected to expand, supported by population growth and economic recovery. Ongoing investments in sustainable feed production, water-use efficiency, and biosecurity are set to improve productivity. Current fish feed demand is estimated at 1.4–1.5 MMT per year and is projected to surpass 2.0 MMT by 2032, driven largely by increased investment in marine species feed.

The wet milling sector consumes 1-1.5 MMT of corn annually, with five major companies dominating the market. The largest company accounts for over 70 percent of wet milling and has been Egypt's leading corn importer for five years, focusing on process improvements for better yields and profitability.

## TRADE

Post forecasts Egypt's corn imports in MY 2025/26 at 9.5 MMT, up by almost 9 percent from Post's previous forecast. Post is also revising MY 2024/25 corn import estimates up by 5.8 percent from Post's previous estimate due to the positive outlook for the poultry sector and the availability of forex. Egypt's yellow corn production covers less than 30 percent of its feed demand needs, while imports supplement the rest of the feed industry. Egypt's top imports of corn primarily originate from Brazil, Ukraine and Argentina; however, U.S. corn exports have started to resume this marketing year (see Figure 2).

**Figure 2: Major Origins Exporting Corn to Egypt**




*Source: Tarde Data Monitor LLC*

**U.S. Corn Exports to Egypt Increase:**
Egypt usually sources corn from Brazil, Ukraine, and Argentina. However, from April – July 2025, U.S. exports of corn saw a significant comeback to the Egyptian markets since MY 2020/21 (521,094 MT). From April-July 2025, U.S. corn exports amounted to 590,228 MT due to competitive prices and satisfaction of importers with quality. Comparatively, U.S corn exports to Egypt only amounted to 2,659 MT between October 2023-August 2024. U.S. exports of corn are expected to reach approximately 700,000 MT by the end of CY 2025.

**Corn Gluten Meal and Dried Distillers' Grains with Solubles Imports Rise:**
According to statistics from The Ministry of Agriculture's Central Administration of Plant Quarantine (CAPQ), Egypt's imports of corn gluten meal (CGM) during the first half of 2025 amounted to 21,439 MT, of which all originated from the United States similar. According to CAPQ, Dried Distillers Grains (DDGs) imports reached 83,850 MT during the first half of 2025, of which Egypt imported 69,557 MT from the United States, representing 83 percent of the total imports. Egypt also imported 14,293 MT from Brazil during the first half of 2025, due to competitive pricing and Egyptian feed millers' desire to test the product.

## STOCKS

Post forecasts Egypt's corn stocks in MY 2025/26 at 1.3 MMT, down by almost 18.5 percent from Post's estimate in MY 2024/25 due to an anticipated decrease in local production and increase in consumption.

| Corn<br>Market Year Begins<br>Egypt | 2023/2024<br>Oct 2023 | | 2024/2025<br>Oct 2024 | | 2025/2026<br>Oct 2025 | |
|---|---|---|---|---|---|---|
| | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| **Area Harvested** (1000 HA) | 950 | 950 | 920 | 920 | 950 | 850 |
| **Beginning Stocks** (1000 MT) | 1511 | 1511 | 1429 | 1429 | 1633 | 1628 |
| **Production** (1000 MT) | 7200 | 7200 | 7000 | 7000 | 7250 | 6700 |
| **MY Imports** (1000 MT) | 8019 | 8019 | 9000 | 9000 | 10000 | 9500 |
| **TY Imports** (1000 MT) | 8019 | 8019 | 9000 | 9000 | 10000 | 9500 |
| **TY Imp. from U.S.** (1000 MT) | 0 | 0 | 0 | 0 | 0 | 0 |
| **Total Supply** (1000 MT) | 16730 | 16730 | 17429 | 17429 | 18878 | 17828 |
| **MY Exports** (1000 MT) | 1 | 1 | 1 | 1 | 1 | 1 |
| **TY Exports** (1000 MT) | 1 | 1 | 1 | 1 | 1 | 1 |
| **Feed and Residual** (1000 MT) | 12800 | 12800 | 13300 | 13300 | 14500 | 13900 |
| **FSI Consumption** (1000 MT) | 2500 | 2500 | 2500 | 2500 | 2600 | 2600 |
| **Total Consumption** (1000 MT) | 15300 | 15300 | 15800 | 15800 | 17100 | 16500 |
| **Ending Stocks** (1000 MT) | 1429 | 1429 | 1628 | 1628 | 1777 | 1327 |
| **Total Distribution** (1000 MT) | 16730 | 16730 | 17429 | 17429 | 18878 | 17828 |
| **Yield** (MT/HA) | 7.5789 | 7.5789 | 7.6087 | 7.6087 | 7.6316 | 7.8824 |
| | | | | | | |
| (1000 HA) ,(1000 MT) ,(MT/HA)<br>MY = Marketing Year, begins with the month listed at the top of each column<br>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 estimates MY 2025/26 (October – September) milled rice production at 4.2 MMT, up by almost 7.7 percent from Post’s earlier production figure. The increase is due to much lower cost of rice production versus other summer crops, such as corn or cotton, which prompted farmers to increase crop area beyond the allotted rice cultivated area set by Egypt’s Ministry of Water Resources and Irrigation (MWRI). Post estimates MY 2025/26 rice area harvested at 720,000 HA, up by 7.46 percent from Post’s earlier estimate.

Rice cultivation in the Delta is vital for preventing seawater intrusion and soil salinization. Early maturing rice varieties developed by ARC require only 9,000-10,000 cubic meters of water per hectare, compared to 14,000-15,000 cubic meters for other varieties. Long-term demand for rice cultivation is expected to grow due to shorter growing periods and higher profits for farmers.

Egypt has registered four new rice varieties—Giza 83, Sakha Super 301, Sakha Super 302, and Sakha Super 303—that are climate-resilient and can withstand heat stress and salinity. These seeds were distributed to farmers this season. ARC has also registered Giza 201 variety (basmati) that was tested this season in several provinces of the Delta and have reportedly received good output.[3] [4]

## CONSUMPTION

Post estimates MY 2025/26 rice consumption and residual at 4.0 MMT, unchanged from Post's earlier estimate. The increased availability of more price-competitive starch products like potatoes and pasta impacts rice consumption. Rice consumption is highest in the northern Delta region and coastal cities, where fish and rice are traditional staples, while consumers in the greater Cairo area often shift to more affordable carbohydrate sources much cheaper than rice.

The rice value chain is privately owned, with prices determined by supply and demand. Farmers and traders sometimes store paddy rice before major holidays to drive up market prices but supply typically increases and prices drop when consumers opt for cheaper alternatives. Current rice prices range from 22 EGP/kilogram (Kg) in government-affiliated stores to 32-38 EGP/Kg in retail markets, depending on brand and quality.

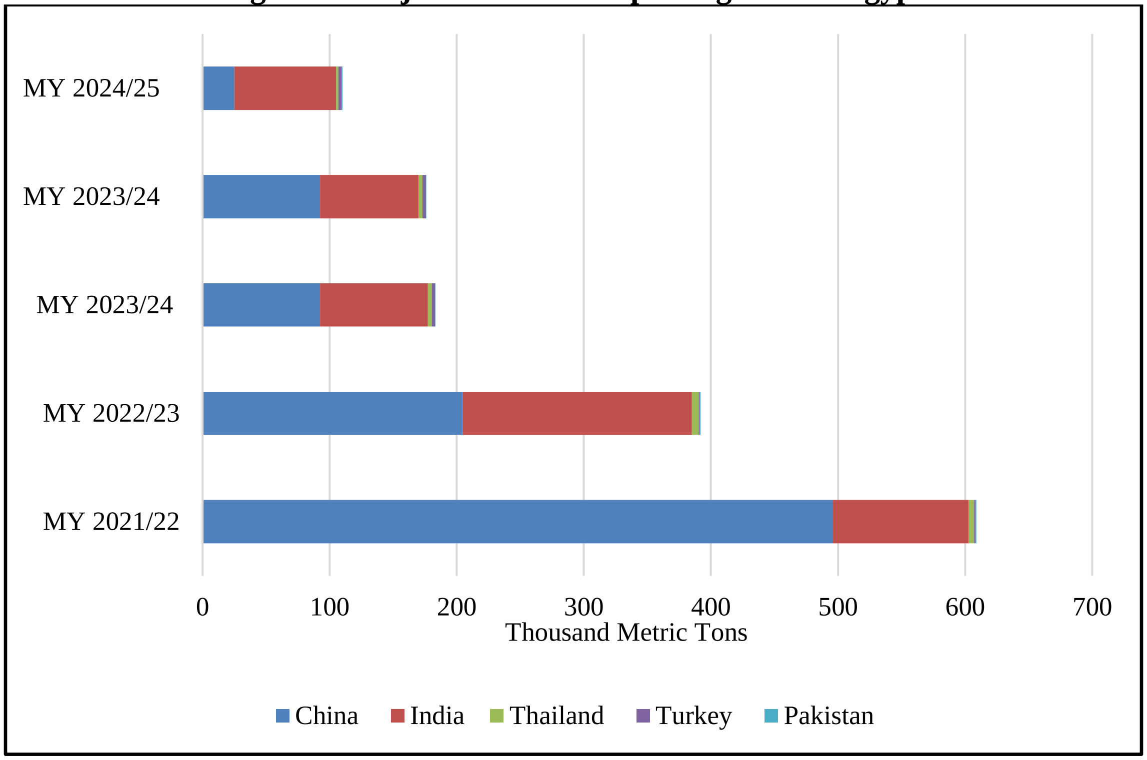
## TRADE

Post forecasts Egypt's rice imports in MY 2025/26 at 140,000 MT, lower than Post's previous estimate of 185,000 MT on account of higher local production. 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 over 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 (see Figure 3).

[3] https://www.dostor.org/4954864

[4] https://www.maspero.eg/tv/2025/09/04/887524/%D8%AF.%D8%AD%D9%85%D8%AF%D9%8A-%D8%A7%D9%84%D9%85%D9%88%D8%A7%D9%81%D9%8A-%D8%A7%D8%B3%D8%AA%D9%86%D8%A8%D8%A7%D8%B7-%D8%A3%D8%B5%D9%86%D8%A7%D9%81-%D8%AC%D8%AF%D9%8A%D8%AF%D8%A9-%D9%85%D9%86-%D8%A7%D9%84%D8%A3%D8%B1%D8%B2-%D9%88%D8%AA%D8%AD%D9%82%D9%8A%D9%82-%D8%A7%D9%84%D8%A7%D9%83%D8%AA%D9%81%D8%A7%D8%A1-%D8%A7%D9%84%D8%B0%D8%A7%D8%AA%D9%8A

**Figure 3: Major Countries Exporting Rice to Egypt**




*Source: Trade Data Monitor LLC*

On February 2, 2025, the Egyptian Customs Authority issued Export Circular No. (3) of 2025, relating to the Egyptian Ministry of Trade's decision No. 722 of 2016, on the suspension of rice exports, including broken rice under customs item 1006.[5] This export ban has been renewed multiple times to preserve rice stock for the local market.

Despite the export ban still in effect, rice exports were permitted to regional destinations and countries of conflict. According to CAPMAS, 83,802 MT of rice was exported during MY 2024/25 to major destinations such as Sudan (36,910 MT), Morrocco (16,879 MT), Syria (8,192 MT), Lebanon (7,574 MT) and Libya (3,476 MT).

## STOCKS

Post forecasts Egypt's ending rice stocks in MY 2025/26 to reach 630,000 MT, up from the previous marketing year's estimate of 569,000 MT. The increase is due to an anticipated increase in domestic milled rice production.

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[5] 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 | 670 | 720 |
| **Beginning Stocks** (1000 MT) | 601 | 601 | 455 | 455 | 355 | 365 |
| **Milled Production** (1000 MT) | 3780 | 3780 | 3900 | 3900 | 3900 | 4200 |
| **Rough Production** (1000 MT) | 5478 | 5478 | 5652 | 5652 | 5652 | 6087 |
| **Milling Rate (.9999)** (1000 MT) | 6900 | 6900 | 6900 | 6900 | 6900 | 6900 |
| **MY Imports** (1000 MT) | 184 | 184 | 150 | 130 | 175 | 140 |
| **TY Imports** (1000 MT) | 155 | 155 | 175 | 130 | 175 | 140 |
| **TY Imp. from U.S.** (1000 MT) | 0 | 0 | 0 | 0 | 0 | 0 |
| **Total Supply** (1000 MT) | 4565 | 4565 | 4505 | 4485 | 4430 | 4705 |
| **MY Exports** (1000 MT) | 60 | 60 | 100 | 120 | 75 | 75 |
| **TY Exports** (1000 MT) | 88 | 88 | 100 | 120 | 75 | 75 |
| **Consumption and Residual** (1000 MT) | 4050 | 4050 | 4050 | 4000 | 4050 | 4000 |
| **Ending Stocks** (1000 MT) | 455 | 455 | 355 | 365 | 305 | 630 |
| **Total Distribution** (1000 MT) | 4565 | 4565 | 4505 | 4485 | 4430 | 4705 |
| **Yield (Rough)** (MT/HA) | 8.6952 | 8.6952 | 8.4358 | 8.4358 | 8.4358 | 8.4542 |
| | | | | | | |

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

OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query

**Attachments:**

No Attachments