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Report Name: Grain and Feed Update

Country: Egypt

Post: Cairo

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Report Highlights:

FAS Cairo estimates a decrease in Egypt's wheat imports for marketing year 2026/27, totaling 12.0 million metric tons, due to increased domestic production and excess stock carry over for its strategic reserves. Corn imports are estimated to remain steady in marketing year 2026/27, similar the previous year. An increase in corn imports from the United States and South America will offset Ukrainian export disruptions and meet growing poultry-sector feed demand. Rice production is expected to remain steady compared to last year, with exports likely to continue to regional markets.

WHEAT

PRODUCTION: Wheat Production for MY 2026/27 (July–June) is estimated at 10.0 million metric tons (MMT), a modest increase from the March 2026 forecast. This upward revision reflects a larger harvested area of 1.5 million hectares (HA), compared to 1.33 million HA in MY 2025/26.

The expanded harvested area in MY 2026/27 stems from the Government of Egypt's (GOE) dual strategy of horizontal and vertical growth—that is, both expanding the land devoted to wheat cultivation and boosting yields on existing acreage. To support this, the Agriculture Research Center (ARC) is encouraging wider adoption of raised bed cultivation techniques, utilizing early maturing, high-yielding wheat varieties, and expanding distribution of certified seeds to growers.

Elevated government procurement prices have further motivated farmers to increase wheat plantings. Since wheat cultivation in Egypt typically occurs from November through April, farmers' planting decisions are heavily shaped by procurement pricing set before the planting season.

Domestic Wheat Procurement: The wheat procurement season in Egypt generally runs from mid-April through mid-August, providing farmers with sufficient time to deliver their harvests to government collection centers. In calendar year (CY) 2026, the GOE purchased a volume of domestically grown wheat that slightly exceeded its 5.0 MMT target—marking an approximately 30 percent increase from the previous season of 4 MMT. This total was made up of 4.72 MMT of milling wheat, along with 150,000 MT designated for certified seed production and 200,000 MT of durum wheat for pasta manufacturers.

On April 7, 2026, the GOE substantially increased procurement prices for the 2026 season to a range of EGP 16,000–16,666.6 (USD \$303.20 –\$315.90) per metric ton, again depending on quality and grade. This price hike was driven by Egypt's efforts to build up strategic wheat reserves and reinforce national food security considering regional instability tied to the Iran conflict. With government procurement prices having a direct effect on farmers' cultivation choices, higher prices serve as an incentive for farmers to plant more wheat and sell greater quantities to state buyers.

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 2026/27 is estimated at 20.7 MMT, up by almost 0.5 percent from MY 2025/26. This is due to a 100,000 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 ranks among the world's largest wheat consumers, with consumption driven by the country's population of over 108 million people according to the Central Agency for Public Mobilization and Statistics (CAPMAS). In addition to the local population, Egypt is also host to over an estimated ten million migrants, refugees, and asylum seekers.

Post raised its prior MY 2025/26 forecast for total wheat consumption by 3.0 percent, reflecting an approximately 2.0 percent increase in food, seed, and industrial (FSI) use. Inflationary pressures eased somewhat during MY 2025/26), with average annual headline urban inflation falling to 13.25 percent from

20.87 percent, of the prior marketing year—signaling improved market conditions. Even so, ongoing month-to-month price volatility suggests a cautious long-term outlook remains warranted despite this progress.¹

Egypt's inflation eased in August 2026, because of slower growth in food prices, reduced imports that helped narrow the trade deficit (aided by a stable dollar exchange rate), and effective Central Bank monetary policy. Data from CAPMAS showed annual urban consumer inflation marginally dropping to 14.5 percent in August from 14.9 percent in July, while the nationwide annual rate slowed to 12.7 percent from 13 percent the previous month. Monthly inflation remained steady compared to July. The food and beverages category fell 1.2 percent overall, with declines across several subcategories: cereals and bread (-0.1 percent), meat and poultry (-1.5 percent), fish and seafood (-0.1 percent), and vegetables, which saw the sharpest drop at 7.0 percent.²

Egypt Bread Subsidy Program: Egypt's Bread Subsidy Program continues to operate with beneficiaries receiving up to 150 loaves monthly (five per day) but now pay 10.8 percent of production costs, with the government covering the remaining 89.2 percent through bakery compensation. Egypt produces 270 million loafs per day through 30,000 bakeries.

Will Egypt Shift to Direct Cash Transfers? On May 10th, 2026, the GOE announced plans to gradually replace its traditional commodity subsidy system with direct cash support for beneficiaries starting in 2027, with details to be announced prior to implementation. Despite the 2026/2027 budget still allocating EGP 178.3 billion (up 11 percent) or USD 3.5 billion to food subsidies, officials say cash transfers will enable better targeting via digital and financial tools, improve the efficiency of public spending, and empowers citizens to make choices based on their real needs.

TRADE: Egypt's wheat imports in MY 2026/27 (July – June) are estimated at 12.0 MMT, down by approximately 23 percent from the previous marketing year because of increased domestic production and significant carry over from the previous marketing year. Post revised upward its prior wheat import estimate in March 2026 by 22 percent due to significant increase in government wheat imports which rose by 52 percent compared to the previous marketing year, bolstering supply reserves for the subsidy program as a buffer against potential price shocks driven by regional conflicts.

Egypt prioritizes cost-effective sourcing and relies heavily on Russian and Ukrainian wheat, which offers competitive prices, lower freight costs, and faster shipping to Egyptian ports than alternative suppliers. However, operational and logistical risks are eroding part of these advantages due to the protracted conflict with an unlikely end. Major suppliers of wheat to Egypt in MY 2025/26 were Russia (8.7 MMT), and Ukraine (3.86 MMT), EU (2.25 MMT) (see Figure 1).

¹ <https://www.cbe.org.eg/en/economic-research/statistics/inflation-rates>

² <https://www.capmas.gov.eg/mediaLanding/news/3521>

The chart displays the projected export of wheat and wheat meslin from Russia to various countries from the 2020/21 marketing year to the 2025/26 marketing year. The Y-axis represents Million Metric Tons, ranging from 0 to 16. The X-axis represents the Marketing Year. The legend identifies the following categories: Russia (dark blue), Ukraine (orange), EU 27 External Trade (Brexite) (green), USA (light blue), Australia (purple), and Canada (light green).

Marketing Year	Russia	Ukraine	EU 27 External Trade (Brexite)	USA	Australia	Canada
2020/21	8.0	1.2	1.0	0.0	0.2	0.0
2021/22	5.0	2.8	3.2	0.0	0.2	0.0
2022/23	8.0	1.0	1.8	0.0	0.2	0.0
2023/24	7.0	1.8	1.8	0.0	0.0	0.0
2024/25	7.5	2.2	1.8	0.0	0.0	0.2
2025/26	8.5	4.0	2.5	0.0	0.0	0.2

Wheat Flour Exports: Wheat flour exports in MY 2026/27 are estimated at 1.4 MMT, up by approximately 17 percent from Post’s estimate in MY 2025/26 due expansion plans into new markets in Africa. Egypt’s top five exports destinations in MY 2025/26 (Oct-May) were Somalia (128.5 TMT), Yemen (120.4 TMT), Sudan (110.3 TMT) and Eritrea (109.6 TMT).

Wheat Market Year Begins Egypt	2024/2025		2025/2026		2026/2027	
	Jul 2024		Jul 2025		Jul 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested ^(1000 HA)	1300	1300	1330	1330	1500	1500
Beginning Stocks ^(1000 MT)	3796	3796	2872	2872	5222	5772
Production ^(1000 MT)	9000	9000	9200	9200	10000	10000
MY Imports ^(1000 MT)	12428	12428	15500	15500	13000	12000
TY Imports ^(1000 MT)	12428	12428	15500	15500	13000	12000
Total Supply ^(1000 MT)	25224	25224	27572	27572	28222	27772
MY Exports ^(1000 MT)	2352	2352	1750	1200	2300	1400
TY Exports ^(1000 MT)	2352	2352	1750	1200	2300	1400
Feed and Residual ^(1000 MT)	1000	1000	1300	1300	1300	1300
FSI Consumption ^(1000 MT)	19000	19000	19300	19300	19400	19400
Total Consumption ^(1000 MT)	20000	20000	20600	20600	20700	20700
Ending Stocks ^(1000 MT)	2872	2872	5222	5772	5222	5672
Total Distribution ^(1000 MT)	25224	25224	27572	27572	28222	27772
Yield ^(MT/HA)	6.9231	6.9231	6.9173	6.9173	6.6667	6.6667

(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 2026/2027 = July 2026 - June 2027

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CORN

PRODUCTION: Corn output for Egypt's MY 2026/27 is estimated at 7 MMT, up slightly from 6.7 MMT in MY 2025/26, driven by higher yields from new private-sector white corn hybrids, improved farmer pest management (notably against fall armyworm), and strong livestock/poultry feed demand pushing adoption of the Agriculture Research Center's (ARC's) recommended practices. Production has benefitted from better extension services, higher-yielding hybrid varieties, optimal planting timing, stronger marketing channels, and expanded demonstration fields to showcase new varieties.

CONSUMPTION: Post estimates corn consumption in MY 2026/27 at 19.5 MMT, an increase of almost 3.2 percent over MY 2025/26. This growth is attributed to the expanding poultry sector, supported by sustainable availability of feed ingredients. Post has also revised its previous estimate for MY 2025/26 corn consumption upward by nearly 12 percent, reflecting continued growth in the poultry, dairy and Aquaculture industries, which remains the primary driver of feed and corn demand. The Egyptian wet milling sector processes between 1-1.5 MMT of corn annually via five major corn wet milling companies, accounting for over 70 percent of total wet milling in Egypt.

Post expects poultry feed consumption to rise as large, vertically integrated poultry companies begin operating more efficiently, attributed to improved foreign exchange (FOREX) rates, easing raw material imports, therefore lower feed costs. Several firms are now investing in new chick, broiler, and egg production projects, while the government expands licensing for livestock, poultry, and fodder projects to support its broader goal of boosting domestic milk and meat output. In MY 2025/26, Egypt produced 1.6 billion commercially raised broilers, and an additional 320 million from rural production, meeting 97 percent of domestic demand, along with 16 billion table eggs (140 per capita), a marked increase from pre-2023 levels of 1.4 billion broilers and 14 billion eggs.

Egypt also leads Africa in aquaculture, producing nearly 1.6 MMT of fish annually, with private farms driving about 80 percent of total output despite challenges like water access, limited disease management awareness, and insufficient processing capacity. Growing investment in fish farms, hatcheries, and processing plants is fueling demand for specialized feeds that enhance growth and productivity, with the aquaculture feed market projected to surpass 2.0 MMT by 2032, up from current annual demand of 1.4–1.5 MMT.

These feeds rely mainly on yellow corn (20-25 percent), wheat bran (20-30 percent), rice bran (10-25 percent), and vegetable oils (1-5 percent), with exact formulations shaped by protein and energy needs, ingredient costs and availability, and the species and size of fish being raised.

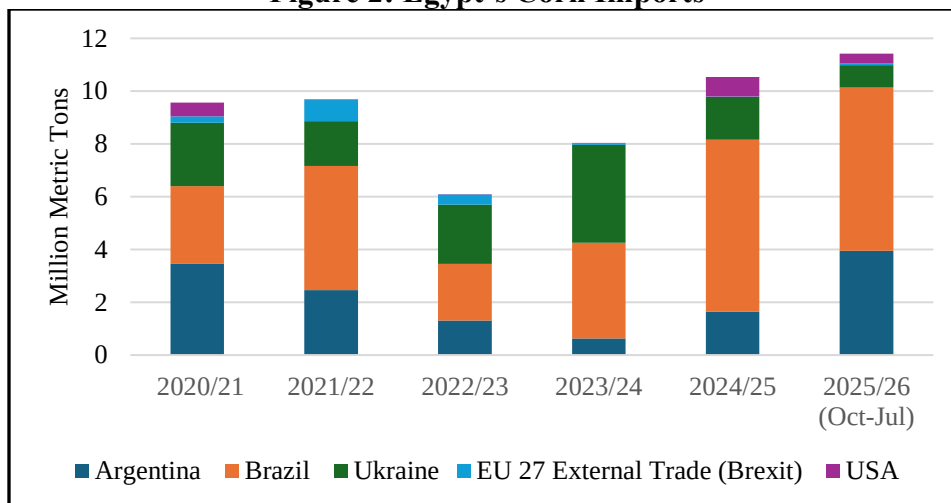
TRADE: Post forecasts Egypt's corn imports in MY 2026/27 at 12.5 MMT, in line with Post's estimate for MY 2025/26, which was revised upward by approximately 23 percent, due to the availability of forex increasing the facilitation of imports, allowing for more corn and livestock feed supply.

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 Egypt's top suppliers of corn to during MY 2025/26 (Oct-Jul) were Brazil (6.18 MMT), Argentina (3.95 MMT), and Ukraine (0.86 MMT) (see Figure 2).

Egypt is poised to increase corn imports from the United States and South America to offset Ukrainian export disruptions and meet growing poultry-sector demand. Renewed Ukrainian shipping setbacks, driven by port strikes and costlier rerouting alternatives, may drive Egypt into aggressive buying, benefiting Brazil and Argentina, while also creating opportunities for US exporters to penetrate the Egyptian market. Corn exports to

Egypt saw a notable rebound in marketing year 2024/25, climbing to 740,000 metric tons. This turnaround was not sustainable in 2025/26 due to lack of competitive pricing.

Figure 2: Egypt's Corn Imports



Source: Trade Data Monitor, LLC.

Corn Gluten Meal and Dried Distillers' Grains with Solubles Imports Rise: Data from Egypt's Central Administration of Agricultural Quarantine (CA PQ) indicates that Egypt's corn gluten meal imports increased 41.1 percent in the first half of 2026, reaching 30,244 metric tons (MT) compared to 21,439 MT in the same period of 2025, with the U.S. supplying the entire volume both years. Similarly, Egypt's imports of Distillers' Dried Grains with Solubles (DDGS) grew nearly 11 percent year-over-year, totaling 92,941 metric tons in the first half of 2026 versus 83,850 metric tons in the first half of 2025, with the U.S. again serving as the sole source.

STOCKS: Post estimates Egypt's corn stocks in MY 2026/27 at 1.9 MMT, in line with Post's estimate in MY 2025/26, which was revised upward from Post's previous estimate by 17.7 percent due to higher imports.

Corn Market Year Begins Egypt	2024/2025		2025/2026		2026/2027	
	Oct 2024		Oct 2025		Oct 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	920	920	850	850	850	850
Beginning Stocks (1000 MT)	1429	1429	1692	1692	1991	1991
Production (1000 MT)	7000	7000	6700	6700	7000	7000
MY Imports (1000 MT)	10564	10564	12500	12500	13200	12500
TY Imports (1000 MT)	10564	10564	12500	12500	13200	12500
Total Supply (1000 MT)	18993	18993	20892	20892	22191	21491
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)	14700	14700	16200	16200	17400	16800
FSI Consumption (1000 MT)	2600	2600	2700	2700	2700	2700
Total Consumption (1000 MT)	17300	17300	18900	18900	20100	19500
Ending Stocks (1000 MT)	1692	1692	1991	1991	2090	1990
Total Distribution (1000 MT)	18993	18993	20892	20892	22191	21491
Yield (MT/HA)	7.6087	7.6087	7.8824	7.8824	8.2353	8.2353

(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 2026/2027 = October 2026 - September 2027

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RICE

PRODUCTION: Post estimates Egypt's MY 2026/27 (October–September) milled rice production at 4.1 MMT, down nearly 2.4 percent from Post's March 2026 estimate, reflecting a 20,000-hectare reduction in harvested area. Although Egypt's Ministry of Water Resources and Irrigation (MWRI) typically issues an annual decree capping rice cultivation in specific Delta governorates, farmers frequently exceed these limits given the crop's cultivation ease, simple storage in paddy form, and profitability. Egyptian rice production remains centered on short- and medium-grain japonica varieties, grown mainly in the northern Nile Delta.

Egypt's rice sector continues to be threatened by abnormally high temperatures, rising sea-levels causing soil salinity issues, and erratic rainfall, impacting yields. To counter this, Egypt's Agriculture Research Center (ARC) developed heat- and salt-tolerant varieties, including ARC's early-maturing strains that reduce water use by nearly half (9,000–10,000 vs. 14,000–15,000 cubic meters per hectare) while helping protect the northern regions of the Nile Delta from seawater intrusion. Going forward, faster-growing varieties, precision farming, and rising interest in organic cultivation position Egypt to boost efficiency, conserve water, and tap into new export markets.

CONSUMPTION: Post estimates Egypt's rice consumption and residual use in MY 2026/27 will remain steady at 4.15 MMT, unchanged from the previous marketing year, which was raised by 3.75 percent due to stable prices and increased demand. Rice remains a dietary staple in Egypt, consumed daily in most households across the northern Delta and coastal cities, where fish and rice form a traditional meal. It also serves as a substantial staple of one of Egypt's signature dishes "Koshari," combining rice, lentils, and pasta.

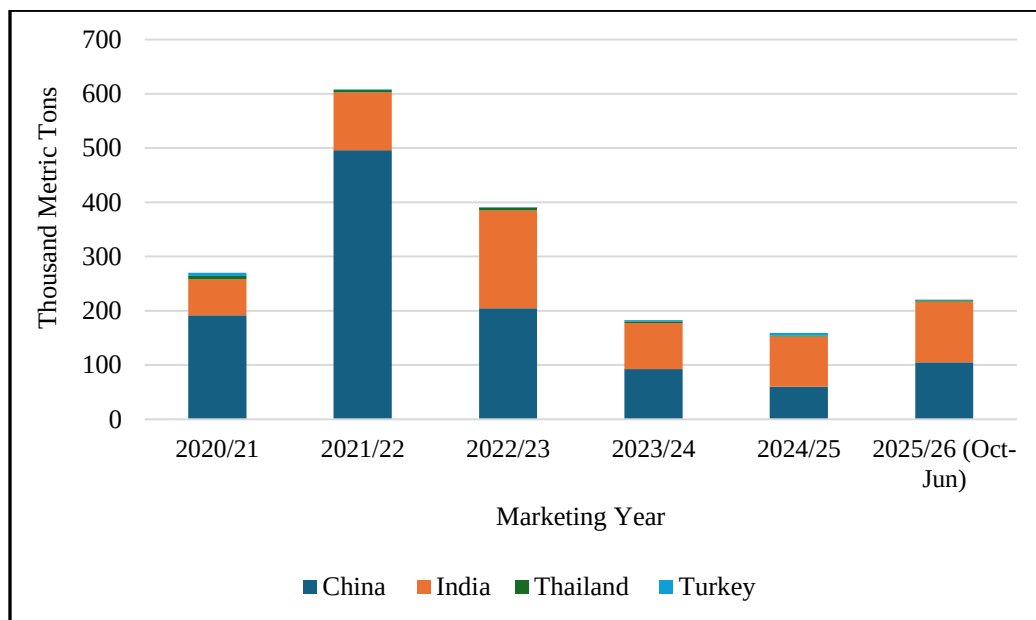
Private companies largely control Egypt's rice value chain. As rice stores easily in paddy form, farmers and traders sometimes withhold stocks ahead of major religious holidays to inflate prices and boost profits. However, when consumers, especially in greater Cairo, shift toward cheaper carbohydrate alternatives such as pasta or potatoes, these withheld stocks return to the market, increasing supply and lowering prices.

Egypt's rice market spans multiple segments, including milled medium- and short-grain white rice, brown rice, parboiled rice, imported aromatic varieties like basmati and jasmine, and organic rice. Milled white rice remains the dominant choice due to its versatility for everyday meals, while demand for long-grain and basmati varieties is rising as health-conscious consumers seek more nutritious options.

TRADE: Post estimates Egypt's rice imports in MY 2026/27 at 250 TMT, unchanged from Post's estimate in MY 2025/26 which was revised upward by 120 TMT due to increased demand of long grain, basmati and jasmine rice.

Imports are primarily 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), and Turkey. During MY 2025/26 (Oct -Jun), Egypt's top rice imports were from India (112.2 TMT) and China (105 TMT), (see Figure 3).

Figure 3: Egypt's Rice Imports



Source: Trade Data Monitor

STOCKS: Post estimates Egypt's ending rice stocks in MY 2026/27 to reach 501 TMT, up from the previous marketing year's estimate of 461TMT. The increase is driven by the carry-over from MY 2025/26.

Rice, Milled Market Year Begins Egypt	2024/2025		2025/2026		2026/2027	
	Oct 2024		Oct 2025		Oct 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	670	670	720	720	720	700
Beginning Stocks (1000 MT)	455	455	311	311	436	461
Milled Production (1000 MT)	3900	3900	4200	4200	4200	4100
Rough Production (1000 MT)	5652	5652	6087	6087	6087	5942
Milling Rate (.9999) (1000 MT)	6900	6900	6900	6900	6900	6900
MY Imports (1000 MT)	160	160	225	250	200	250
TY Imports (1000 MT)	199	200	225	250	200	250
Total Supply (1000 MT)	4515	4515	4736	4761	4836	4811
MY Exports (1000 MT)	154	154	150	150	200	160
TY Exports (1000 MT)	164	150	150	150	200	160
Consumption and Residual (1000 MT)	4050	4050	4150	4150	4175	4150
Ending Stocks (1000 MT)	311	311	436	461	461	501
Total Distribution (1000 MT)	4515	4515	4736	4761	4836	4811
Yield (Rough) (MT/HA)	8.4358	8.4358	8.4542	8.4542	8.4542	8.4886
(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 2026/2027 = January 2027 - December 2027						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Attachments:

No Attachments