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**Country:** Egypt

**Post:** Cairo

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**Report Highlights:**

FAS/Cairo (Post) forecasts Egypt's soybean imports in marketing year (MY) 2025/26 (October – September) to increase by 5.0 percent from the previous marketing driven by a flexible exchange rate, the availability of forex and a more positive outlook for the livestock sectors. U.S.-origin soybean exports to Egypt accounted for almost 70.0 percent of the total beans exported to Egypt during the past five marketing years. U.S. beans are likely to continue to lead the soybean market in Egypt during the forecasted period due to increased demand of higher quality meal incorporated in feed rations and high-quality soybean oil. Overall feed use of oilseed meals is also forecasted up, driven by demand from end users. Higher levels of sunflowerseed oil consumption and trade in the forecasted and current marketing years is mainly driven by lack of local production and higher consumption.

# NARRATIVE

## SEEDS

In Egypt, domestic production of soybeans and sunflowerseeds is insufficient to cover local consumption. High production costs and challenges with contract farming have always been a limiting factor in increasing production. The Agriculture Research Center (ARC) within the Ministry of Agriculture and Land Reclamation (MALR) is focused on breeding new varieties to increase the yield per unit area and to adapt to changing environmental conditions. Yield potential will depend on future growing conditions, such as heat and drought.

Egypt is the Middle East and North Africa's largest importer and consumer of soybeans. While corn remains the primary feed component for the poultry industry, soymeal is incorporated into feed rations for poultry, dairy cows and aquaculture at different levels and percentages.

FAS/Cairo forecasts Egypt's soybean imports in MY 2025/26 at 4.2 MMT, up by 5.0 percent from Post's estimate in the previous marketing year. Post attributes the increase in imports to an increase in forex availability and an anticipated pickup in the feed consumption rate. Post is revising upward its previous import estimate in MY 2024/25 by 29.0 percent for the same reasons.

## MEALS

FAS/Cairo forecasts sustainable feed and raw feed materials in MY 2025/26, as well as stability in prices (especially after the increase in the availability of foreign currency which increased imports and allowed companies to resume to more normal levels). Overall feed use of oilseed meals is also forecast to be on an upward trend due to an anticipated growth in the poultry, aquaculture, and dairy sectors. Feed use of soymeal is forecast to be up by 3.1 percent compared to the previous marketing year. Similarly, the use of sunflowerseed meal is forecasted to increase, especially for feed used for large animals. Soybean meal is the major source of protein in feed rations and used extensively in feed due to higher quality.

## OILS

FAS/Cairo forecasts Egypt's soybean, sunflowerseed, and palm oil consumption for food in MY 2025/26 at 2.49 MMT, up 2.9 percent from the previous marketing year's volume of 2.43 MMT. Both soybean and sunflowerseed oil are forecast for higher volume growth over the forecast period, driven by population increase, higher demand, and decline in inflation rates. A shift to a flexible exchange rate system is helping Egypt's economy to adjust more smoothly to external shocks and support imports of raw material needed for the oil processing sector.

## TARIFFS

Egypt does not impose import tariffs on soybeans, sunflowerseed, linseed, palm kernel, nor sesame seed. Duties on oilseed meal and cake are five percent. Duties on bulk crude and refined soybean and sunflowerseed oil are two percent. Crude cottonseed and palm oil duties are zero.

## OILSEEDS:

## SOYBEANS

### PRODUCTION, SUPPLY AND DEMAND DATA STATISTICS:

Oilseed, Soybean Market Year Begins	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>Egypt</b>						
<b>Area Planted</b> (1000 HA)	30	30	30	30	0	30
<b>Area Harvested</b> (1000 HA)	30	30	30	30	0	30
<b>Beginning Stocks</b> (1000 MT)	140	140	235	235	0	278
<b>Production</b> (1000 MT)	85	85	85	85	0	85
<b>MY Imports</b> (1000 MT)	3177	3177	3600	4000	0	4200
<b>Total Supply</b> (1000 MT)	3402	3402	3920	4320	0	4563
<b>MY Exports</b> (1000 MT)	0	0	0	0	0	0
<b>Crush</b> (1000 MT)	3125	3125	3500	4000	0	4200
<b>Food Use Dom. Cons.</b> (1000 MT)	17	17	17	17	0	17
<b>Feed Waste Dom. Cons.</b> (1000 MT)	25	25	25	25	0	25
<b>Total Dom. Cons.</b> (1000 MT)	3167	3167	3542	4042	0	4242
<b>Ending Stocks</b> (1000 MT)	235	235	378	278	0	321
<b>Total Distribution</b> (1000 MT)	3402	3402	3920	4320	0	4563
<b>Yield</b> (MT/HA)	2.8333	2.8333	2.8333	2.8333	0	2.8333
(1000 HA) ,(1000 MT) ,(MT/HA)						
OFFICIAL DATA CAN BE ACCESSED AT: <a href="#">PSD Online Advanced Query</a>						

### PRODUCTION

FAS/Cairo forecasts Egypt's soybean production in MY 2025/26 (October–September) at 85,000 metric tons, stagnate to Post's previous marketing year estimate. High production costs, increased heat during the planting season, and less contract farming have always been a limiting factor in increasing production. Area harvested remains also stagnate to Post's previous marketing year estimate.

The soybean growing season runs from May to August and is mostly planted in Middle and Upper Egypt (see Map 1). ARC is the authority responsible for the release and marketing of certified soybean seeds. ARC has six soybean varieties which farmers use for planting—Giza 21, Giza 35, Giza 25, Giza 82, Giza 83 and Giza 111.

**Map 1: Soybean Production Areas in Egypt**



*Source: FAS/International Production Assessment Division*

Advanced contract farming administered by the Ministry of Agriculture and Land Reclamation enables farmers to feel more secure in terms of sales. Contracts generally take place between farmers and stakeholders in which domestic production of soybeans is used mostly in the production of full fat soybeans, which is then used in feed rations for lactating cows and broiler chickens at a 2-3 percent ratio.

## **CONSUMPTION**

FAS/Cairo forecasts Egypt's soybean consumption in MY 2025/26 at approximately 4.2 MMT, due to an anticipated pick up by the crushing sector amid the increase in imports for more beans to crush. Egypt is the Middle East and North Africa's largest importer and consumer of soybeans. While corn remains the primary feed component for the poultry industry, soybean meal is incorporated into feed rations for poultry, dairy cows, and aquaculture at different levels and percentages.

Post's forecast of Egypt's crush capacity to increase by 5.0 percent in MY 2025/26 compared to Post's estimate the previous marketing year, due to anticipated increase in the supply of beans as result of a continual increase in imports.

The actual crushing capacity in Egypt hovers around 9 -10 MMT, and crush facilities usually operate at about 55-60 percent of their actual capacity. From October 2024-March 2025 (the first quarter of the MY) some crush plants increased their utilized capacities above 60 percent of their actual crushing capacities due to the availability of forex that resulted in an increase in soybean imports.

Post is revising upward its previous total consumption estimate in MY 2024/25 up by 22.8 percent due an anticipated increase in supply amid a significant pick up in imports.

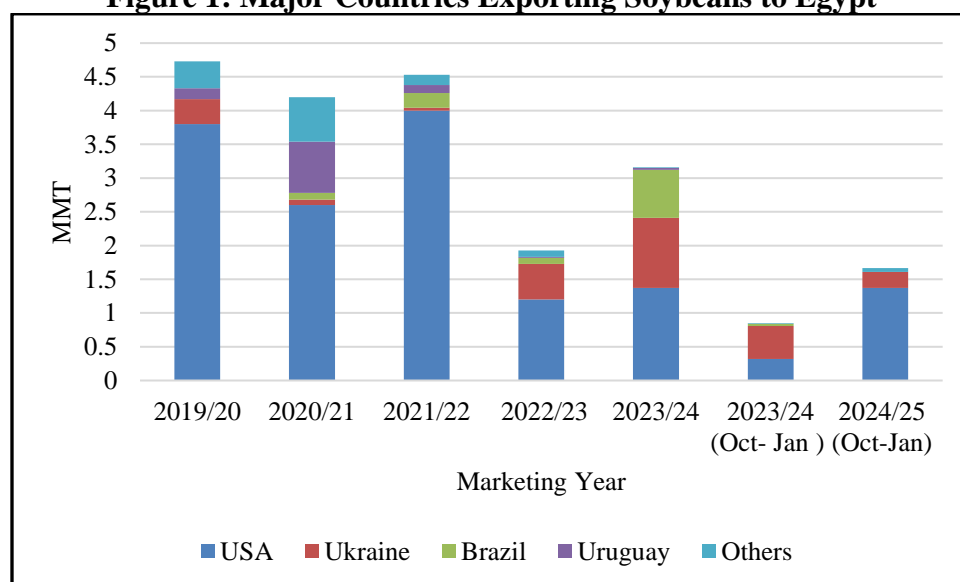
Egypt's domestic consumption of soybeans for food use in MY 2025/26 will remain roughly at 17,000 metric tons, the same as Post's earlier MY 2024/25. In Egypt, soy is mainly consumed in confectionary products or as soymilk.

## TRADE

FAS/Cairo forecasts Egypt's soybean imports in MY 2025/26 at 4.2 MMT, up by 5.0 percent from Post's estimate the pervious marketing year. Post attributes the increase in imports to the influx of foreign currency and an anticipated pick up in the feed consumption rate by the livestock sector. Post is revising upward its previous import estimate in MY 2024/25 by 29 percent amid forex availability and a pick up in meal consumption by the livestock sector.

Dairy, poultry, and fish producers are critically reliant upon imports as its domestic soybean production is anticipated to cover only 2 percent of domestic demand in MY 2025/26. Between MY 2019/20 and MY 2023/24, Egypt imported 18.5 MMT of soybeans. Throughout this period, Egypt's main suppliers have been the United States (13.0 MMT), Ukraine (2.0 MMT) and Brazil (1.1 MT) followed by Argentina and Uruguay at 1.0 MMT each (see Figure 1).

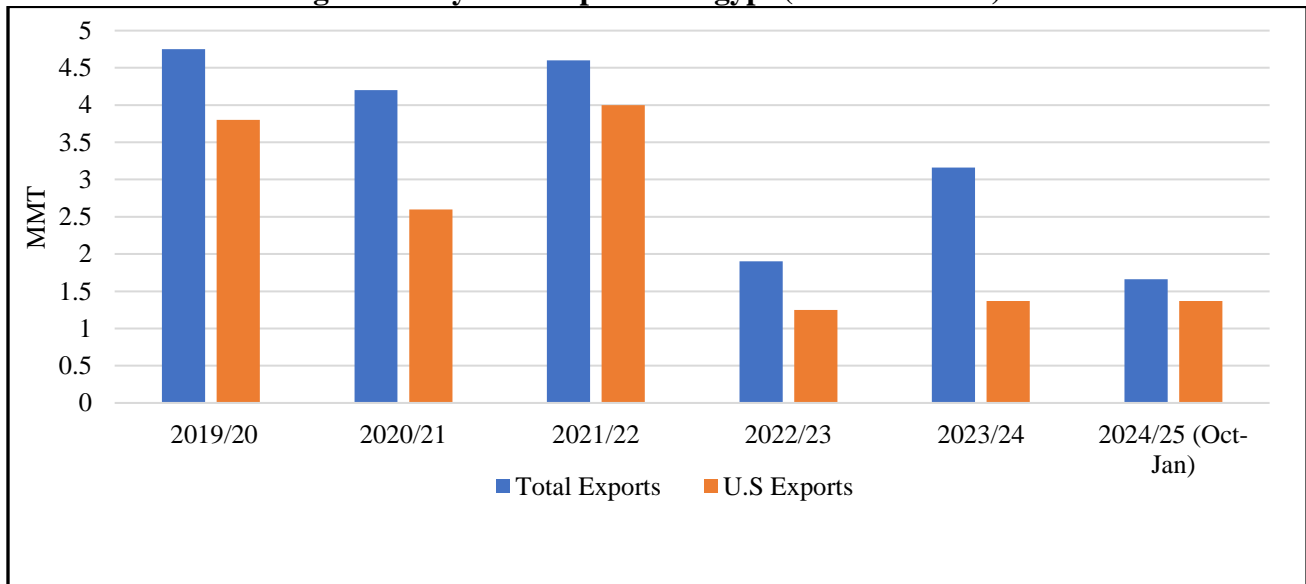
**Figure 1: Major Countries Exporting Soybeans to Egypt**



*Source: Trade Data Monitor LLC. & FAS/Cairo Research*

U.S.-origin soybean exports to Egypt accounted for almost 70.0 percent of the total beans exported to Egypt between MY 2019/20 and MY 2023/24. U.S. beans are likely to continue to lead the soybean market in Egypt during the current marketing year and the forecasted period due to pricing, increased demand, and the higher quality of meal and oil being produced (see Figure 2).

**Figure 2: Soybean Exports to Egypt (World vs. U.S.)**



*Source: Trade Data Monitor LLC. & FAS/Cairo Research*

Egyptian traders and crushers demand sustainability and quality of supply, both of which are key features of U.S.-origin soybean. Industry sources report that meals produced from U.S.-origin soybeans show better uniformity, less fiber, and higher protein content than that of other origins. U.S.-origin soybeans also have higher oil content with superior quality.

## **STOCKS**

Posts forecasts MY 2025/26 soybean stocks at 321,000 MT up by almost 15.5 percent than the previous marketing year due to a forecasted increase in supply of beans because of increased imports for MY 2025/26. Carrying stock levels are mainly held by private industry and private traders.

## SUNFLOWERSEEDS

### PRODUCTION, SUPPLY AND DEMAND DATA STATISTICS:

Oilseed, Sunflower seed Market Year Begins	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>Egypt</b>						
<b>Area Planted</b> (1000 HA)	8	20	8	20	0	20
<b>Area Harvested</b> (1000 HA)	8	20	8	20	0	20
<b>Beginning Stocks</b> (1000 MT)	5	5	5	8	0	6
<b>Production</b> (1000 MT)	21	50	22	50	0	50
<b>MY Imports</b> (1000 MT)	8	40	40	40	0	40
<b>Total Supply</b> (1000 MT)	34	95	67	98	0	96
<b>MY Exports</b> (1000 MT)	5	3	3	3	0	3
<b>Crush</b> (1000 MT)	15	75	50	80	0	80
<b>Food Use Dom. Cons.</b> (1000 MT)	9	9	9	9	0	10
<b>Feed Waste Dom. Cons.</b> (1000 MT)	0	0	0	0	0	0
<b>Total Dom. Cons.</b> (1000 MT)	24	84	59	89	0	90
<b>Ending Stocks</b> (1000 MT)	5	8	5	6	0	3
<b>Total Distribution</b> (1000 MT)	34	95	67	98	0	96
<b>Yield</b> (MT/HA)	2.625	2.5	2.75	2.5	0	2.5
(1000 HA) ,(1000 MT) ,(MT/HA)						
OFFICIAL DATA CAN BE ACCESSED AT: <a href="#">PSD Online Advanced Query</a>						

### PRODUCTION

FAS/Cairo forecasts Egypt's sunflowerseed production in MY 2025/26 (October–September) at 50,000 MT, similar to Post's estimate in the previous marketing year. Despite the crop's adaptability to various types of soils and weather conditions during the crop season, area and production are expected to remain unchanged in the coming years due to less contractual farming and lower profitability compared to other competing crops such as medicinal herbs and spices produced for exports. The two main sunflowerseed varieties currently planted are Sakha 53 and Giza 102, with an average yield of 2.83 MT/hectare (HA). Sunflowerseeds are planted throughout the Delta governorates in May and June (see Map 2).

**Map 2: Sunflowerseed Production Areas in Egypt**



*Source: FAS/International Production Assessment Division*

## **CONSUMPTION**

FAS/Cairo forecasts Egypt's sunflowerseed consumption in MY 2025/26 at 90,000 MT, due to a slight increase in food use consumption by 1,000 MT from the previous marketing year because of increasing growing awareness (among urban consumers) of the health benefits and affordability of sunflowerseeds as a snack food. In Egypt, sunflowerseeds are roasted, seasoned, and sold in-shell. Imported sunflowerseeds are either processed by the private sector to extract sunflowerseed oil or used for food consumption. Domestic sunflowerseeds, in contrast, are mainly crushed by small local crushers (using more primitive methods) close to their production areas in Middle and Upper Egypt. FAS/Cairo forecasts sunflowerseed crush in MY 2025/26 at 80,000 MT, similar to the previous marketing year.

## **TRADE**

FAS/Cairo forecasts Egypt's sunflowerseed imports in MY 2025/26 at 40,000 MT, unchanged from Post's estimate in the previous marketing year. China has been the leading supplier of sunflowerseeds to Egypt during the past five marketing years and is forecast to continue dominating the market.

## **STOCKS**

Posts forecasts MY 2025/26 sunflowerseeds stocks at 3,000 MT, down by 50 percent from the previous marketing year due to an increase in food use consumption because of population growth. Carrying stock levels are mainly held by private traders.



## MEALS:

### SOYBEAN MEAL

#### PRODUCTION, SUPPLY AND DEMAND DATA STATISTICS:

Meal, Soybean Market Year Begins	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
Egypt	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>Crush</b> (1000 MT)	3125	3125	3500	4000	0	4200
<b>Extr. Rate,</b> <b>999.9999</b> (PERCENT)	0.7901	0.7901	0.79	0.75	0	0.75
<b>Beginning Stocks</b> (1000 MT)	150	150	155	155	0	105
<b>Production</b> (1000 MT)	2469	2469	2765	3000	0	3150
<b>MY Imports</b> (1000 MT)	458	458	750	150	0	120
<b>Total Supply</b> (1000 MT)	3077	3077	3670	3305	0	3375
<b>MY Exports</b> (1000 MT)	12	12	5	0	0	0
<b>Industrial Dom. Cons.</b> (1000 MT)	0	0	0	0	0	0
<b>Food Use Dom. Cons.</b> (1000 MT)	0	0	0	0	0	0
<b>Feed Waste Dom. Cons.</b> (1000 MT)	2910	2910	3400	3200	0	3300
<b>Total Dom. Cons.</b> (1000 MT)	2910	2910	3400	3200	0	3300
<b>Ending Stocks</b> (1000 MT)	155	155	265	105	0	75
<b>Total Distribution</b> (1000 MT)	3077	3077	3670	3305	0	3375
(1000 MT) ,(PERCENT)						
OFFICIAL DATA CAN BE ACCESSED AT: <a href="#">PSD Online Advanced Query</a>						

#### PRODUCTION

FAS/Cairo forecasts Egypt's soybean meal production in MY 2025/26 (October-September) at 3.15 MMT, up by 5.0 percent from the previous marketing year. The increase in soybean meal production is due to an anticipated increase in crushing activity driven by an increase in soybean imports. Post is revising upward MY 2024/25 soybean meal production to 3.0 MMT from its earlier estimate of 2.5 MMT for the same reasons. The availability of foreign currency in Egypt at the beginning of MY 2024/25 was significant, thus impacting the estimated volume of imported beans used for crushing and meal production.

## CONSUMPTION

FAS/Cairo forecasts Egypt's soybean meal consumption in MY 2025/26 at 3.3 MMT, up by 3.1 percent from the previous marketing year due to a projected pickup in feed demand by the poultry, large animals, and aquaculture sectors. Post is revising upward MY 2024/25 soybean meal consumption to 3.2 MMT from its earlier estimate of 2.85 MMT because of an increase in soybean imports and hence more crushing of beans to meet the demand of the livestock sector. Soybean meal has become a major source of protein in various feed formulations.

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) have started to utilize their capacities efficiently. This increase in capacity was driven by lower feed production costs amid the availability of forex that gave a boost to imports of feed raw material. Some of these companies are starting to invest in new projects for chicks, broilers 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 broiler breeding cycles.

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.

Egypt's poultry feed mills produce poultry feed-mix consisting of 70 percent yellow corn, 20 percent soybean meal, 3.4 percent wheat bran, and 1.9 percent broiler concentrates (fish or meat meals) in addition to minerals and vitamins. Egypt has 180 poultry feed mills producing various types of feed formulations for the poultry industry; these supply over 95 percent of the domestic market's demand.

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. The push for more projects will further increase the need for more soybean meal for these sectors.

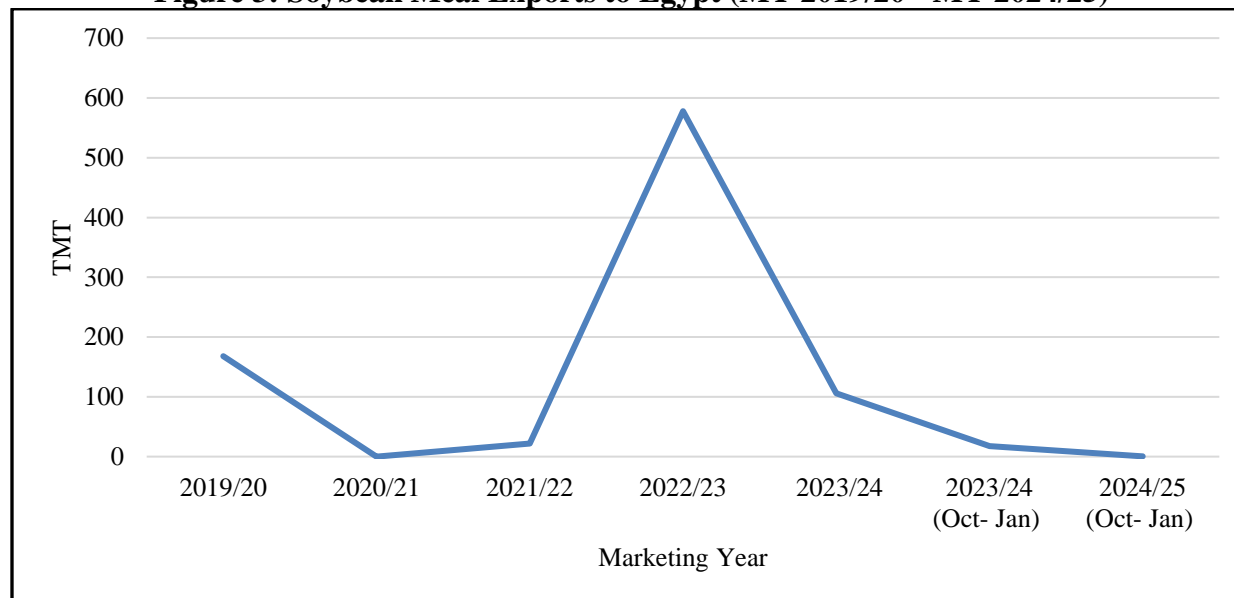
Egypt is also a leading aquaculture producer in Africa, producing almost 1.6 MMT of fish annually. Aquaculture accounts for roughly 80 percent of Egypt's fish production, primarily via private farms. The aquaculture feed market demand is forecast to exceed 2.0 MMT by 2032. To meet the increase in feed 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. The most common fish feed formulations contain 30-40 percent soybean meal. 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 on the aquaculture sector, see GAIN report “Egypt: Egyptian Aquaculture Industry – 2025 Update”).<sup>1</sup>

## TRADE

FAS/Cairo forecasts Egypt’s soybean meal imports in MY 2025/26 at 120,000 MT, down by 20 percent from the previous marketing year’s estimate of 150,000 metric tons. The drop is due to a projected increase in local production during MY 2025/26. Post’s MY 2024/25 import figure was revised downward by 50,000 MT from the previous estimate, amid increased crush and meal production. Soybean meal exports to Egypt amounted to 874,000 MT during the past five years (see Figure 3).

**Figure 3: Soybean Meal Exports to Egypt (MY 2019/20 - MY 2024/25)**



Source: Trade Data Monitor LLC. & FAS/Cairo Research

## STOCKS

Posts forecasts MY 2025/26 soybean meal stocks at 75,000 MT, less by approximately 28.6 percent than the previous marketing year. The forecasted decrease is due to a forecasted increase in meal consumption for MY 2025/26 by 3.1 percent. Carrying stock levels of soy meal are held by private feed millers and private traders.

1

[https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Egyptian%20Aquaculture%20Industry%20-%202025%20Update\\_Cairo\\_Egypt\\_EG2025-0006.pdf](https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Egyptian%20Aquaculture%20Industry%20-%202025%20Update_Cairo_Egypt_EG2025-0006.pdf)

## SUNFLOWERSEED MEAL

### PRODUCTION, SUPPLY AND DEMAND DATA STATISTICS:

Meal, Sunflowerseed Market Year Begins	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>Egypt</b>						
<b>Crush</b> (1000 MT)	15	75	50	80	0	80
<b>Extr. Rate,</b> <b>999.9999</b> (PERCENT)	0.5333	0.5333	0.52	0.5375	0	0.5375
<b>Beginning Stocks</b> (1000 MT)	14	14	17	24	0	22
<b>Production</b> (1000 MT)	8	40	26	43	0	43
<b>MY Imports</b> (1000 MT)	135	135	150	135	0	140
<b>Total Supply</b> (1000 MT)	157	189	193	202	0	205
<b>MY Exports</b> (1000 MT)	0	0	0	0	0	0
<b>Industrial Dom. Cons.</b> (1000 MT)	0	0	0	0	0	0
<b>Food Use Dom. Cons.</b> (1000 MT)	0	0	0	0	0	0
<b>Feed Waste Dom. Cons.</b> (1000 MT)	140	165	175	180	0	185
<b>Total Dom. Cons.</b> (1000 MT)	140	165	175	180	0	185
<b>Ending Stocks</b> (1000 MT)	17	24	18	22	0	20
<b>Total Distribution</b> (1000 MT)	157	189	193	202	0	205
(1000 MT) ,(PERCENT)						
OFFICIAL DATA CAN BE ACCESSED AT: <a href="#">PSD Online Advanced Query</a>						

### PRODUCTION

FAS/Cairo forecasts Egypt's sunflowerseed meal production in MY 2025/26 (October-September) at 43,000 MT, similar to the previous marketing year, reflecting the same crushing activity. Crushing activity is very limited due to low demand for sunflowerseed meal which is only utilized by some small or medium-sized cattle farms.

### CONSUMPTION

FAS/Cairo forecasts Egypt's sunflowerseed meal consumption in MY 2025/26 at 185,000 MT due to increased preference of small-scale cattle growers to include sunflowerseed meal in their feed rations to reduce costs. Post is revising upward its previous estimate in MY 2024/25 by 20,000 MT due newcomers to the cattle business that are small to medium scale in nature, or a resumption of production by existing farms that had put their operations on hold amid the forex crisis.

## TRADE

FAS/Cairo forecasts Egypt's imports of sunflowerseed meal in MY 2025/26 at 140,000 MT. The availability of forex will make it easier to increase imports in the forecasted marketing year. Post is revising upward its previous estimate in MY 2024/25 by 15,000 MT due to improved foreign currency availability amid fiscal reforms. Marketing year 2024/25 (October-February) amounted to 67,249 MT compared to 62,508 MT during the same previous time period (see Figure 4).

**Figure 4: Sunflowerseed Meal Exports to Egypt (MY 2018/19 – MY 2024/25)**



*Source: Trade Data Monitor LLC. & FAS/Cairo Research*

## STOCKS

Posts forecasts MY 2025/26 sunflower meal stock at 20,000 MT, less by 3,000 MT from the previous marketing year. The decrease is due to a 2.7 percent anticipated increase in consumption by some cattle farms. Carrying stock levels of sunflower meal are held by private feed millers and cattle growers.

## OILS:

### SOYBEAN OIL

#### PRODUCTION, SUPPLY AND DEMAND DATA STATISTICS:

Oil, Soybean Market Year Begins	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
Egypt	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>Crush</b> (1000 MT)	3125	3125	3500	4000	0	4200
<b>Extr. Rate,</b> <b>999.9999</b> (PERCENT)	0.1827	0.1827	0.1823	0.17	0	0.1702
<b>Beginning Stocks</b> (1000 MT)	88	88	84	54	0	109
<b>Production</b> (1000 MT)	571	571	638	680	0	715
<b>MY Imports</b> (1000 MT)	37	37	150	130	0	100
<b>Total Supply</b> (1000 MT)	696	696	872	864	0	924
<b>MY Exports</b> (1000 MT)	132	132	45	45	0	60
<b>Industrial Dom. Cons.</b> (1000 MT)	10	10	10	10	0	10
<b>Food Use Dom. Cons.</b> (1000 MT)	470	500	700	700	0	720
<b>Feed Waste Dom. Cons.</b> (1000 MT)	0	0	0	0	0	0
<b>Total Dom. Cons.</b> (1000 MT)	480	510	710	710	0	730
<b>Ending Stocks</b> (1000 MT)	84	54	117	109	0	134
<b>Total Distribution</b> (1000 MT)	696	696	872	864	0	924
(1000 MT) ,(PERCENT)						
OFFICIAL DATA CAN BE ACCESSED AT: <a href="#">PSD Online Advanced Query</a>						

#### PRODUCTION

FAS/Cairo forecasts Egypt's soybean oil production in MY 2025/26 (October-September) at 715,000 MT, up by 5.15 percent from Post's production estimate in MY 2024/25. The increase in soybean oil production reflects higher crushing activity. Post's estimate of soybean oil production in MY 2024/25 was revised upward from Post's previous estimate by almost 8 percent due to anticipated higher beans imported for crushing.

#### CONSUMPTION

FAS/Cairo forecasts soybean oil consumption to reach about 730,000 MT in MY 2025/26. Post attributes the increase in soybean oil consumption in MY 2025/26 to an increase in soybean oil

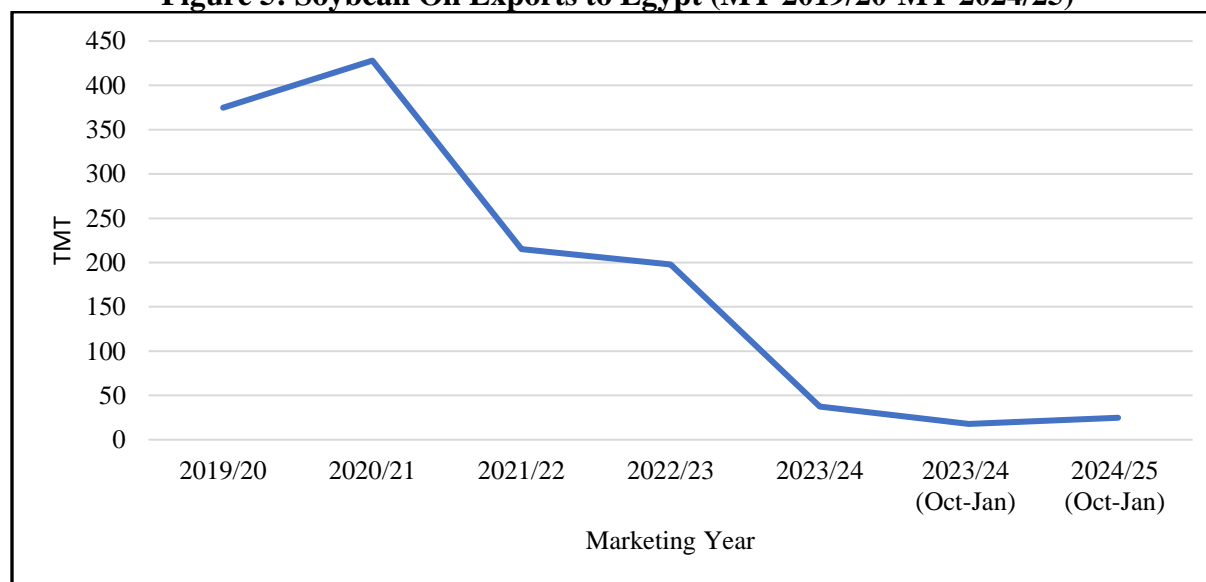
supply as a result of increased domestic crushing. This enables larger amounts of higher-quality cooking oil to be blended with soybean and sunflowerseed oils and then channeled through the country's subsidy program and retail chains. Blended oils are cheaper than their pure counterparts and are preferred by consumers for frying. However, Post is revising downward its consumption estimate of soybean oil in MY 2024/25 to 700,000 MT from the previous estimate of 750,000 MT due to repercussions of inflationary pressures during 2023 and 2024.

**The Food Subsidy Program:** Roughly 64 million Egyptians make use of food subsidies delivered by the government as credits on SMART cards; these credits are redeemable monthly for food staples, including oil. For example, all SMART card beneficiaries are entitled to 1.0 liters of blended vegetable oil per beneficiary. A network of 1,300 state-owned consumer outlets managed by the Ministry of Supply and Internal Trade's (MOSIT) Holding Company for Food Industries (HCFI) accept SMART cards, as well as 40,000 partnered, private grocery stores. The subsidy program in CY 2022 provides cash allowances of EGP 50 (approximately \$1 USD) per beneficiary.

## TRADE

FAS/Cairo forecasts Egypt's soybean oil imports in MY 2025/26 at 100,000 MT as higher local production of soybean oil is expected to offset imports. Marketing year 2024/25 soybean oil imports (October-January) amounted to 24,717 MT, primarily from the EU, U.S. and Turkey (see Figure 5).

**Figure 5: Soybean Oil Exports to Egypt (MY 2019/20-MY 2024/25)**



Source: USDA PS&D and FAS/Cairo Research

## STOCKS

Post forecasts soy oil ending stocks in MY 2025/26 at 134,000 MT, almost 23 percent higher than Post's estimate in the previous marketing year. The increase is due to a higher production of soy oil amid forecasted increase in the crush of beans. Carrying soy oil stock levels are held by both public and private sectors, but the private sector has a larger share.

## SUNFLOWERSEED OIL

### PRODUCTION, SUPPLY AND DEMAND DATA STATISTICS:

Oil, Sunflowerseed Market Year Begins Egypt	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>Crush</b> (1000 MT)	15	75	50	80	0	80
<b>Extr. Rate,</b> <b>999.9999</b> (PERCENT)	0.4	0.4267	0.44	0.4375	0	0.4375
<b>Beginning Stocks</b> (1000 MT)	43	43	64	65	0	70
<b>Production</b> (1000 MT)	6	32	22	35	0	35
<b>MY Imports</b> (1000 MT)	600	700	450	600	0	620
<b>Total Supply</b> (1000 MT)	649	775	536	700	0	725
<b>MY Exports</b> (1000 MT)	50	10	10	10	0	10
<b>Industrial Dom. Cons.</b> (1000 MT)	0	0	0	0	0	0
<b>Food Use Dom. Cons.</b> (1000 MT)	535	700	450	620	0	650
<b>Feed Waste Dom. Cons.</b> (1000 MT)	0	0	0	0	0	0
<b>Total Dom. Cons.</b> (1000 MT)	535	700	450	620	0	650
<b>Ending Stocks</b> (1000 MT)	64	65	76	70	0	65
<b>Total Distribution</b> (1000 MT)	649	775	536	700	0	725
(1000 MT) ,(PERCENT)						
OFFICIAL DATA CAN BE ACCESSED AT: <a href="#">PSD Online Advanced Query</a>						

## PRODUCTION

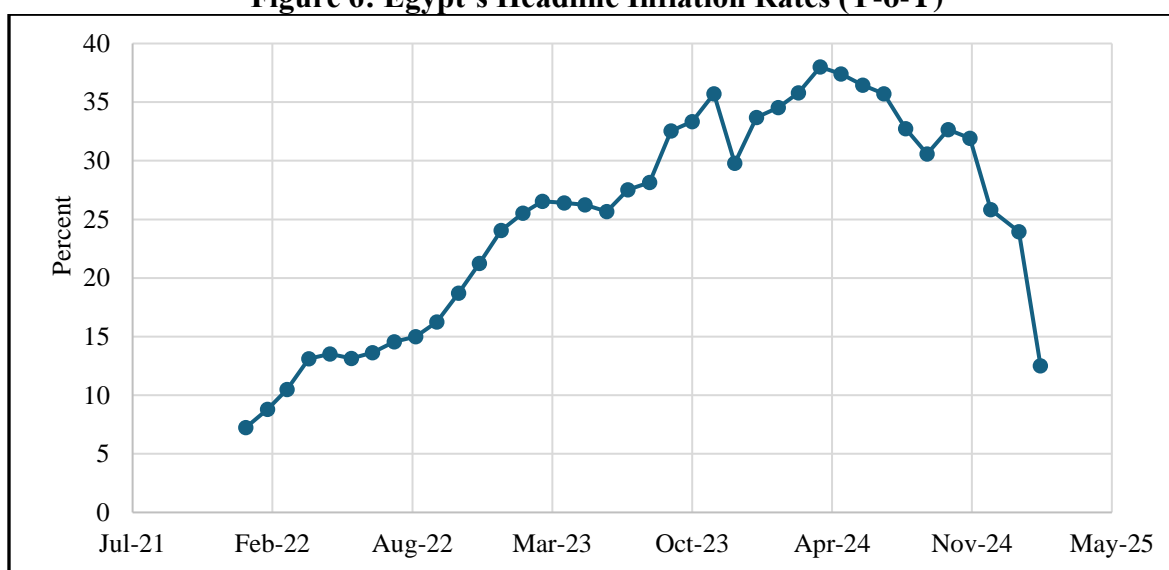
FAS/Cairo forecasts Egypt's sunflowerseed oil production in MY 2025/26 (October - September) at 35,000 MT reflecting the same levels of crush activity.



## CONSUMPTION

FAS/Cairo forecasts Egypt's sunflowerseed oil consumption in MY 2025/26 at 650,000 MT, up by 30,000 MT from Post's estimate of 620,000 MT in MY 2024/25. The anticipated rise in consumption is due to anticipated competitive pricing in the local market amid gradual improvements in economic conditions and a reduction in inflation rates (see Figure 6). Higher levels of sunflowerseed oil consumption in MY 2025/2026 will be mainly driven by urban population growth and competitive pricing in the global market which prompts both public and private sector to import significant volumes of crude sunflowerseed oil for refining and blending with other oils.

**Figure 6: Egypt's Headline Inflation Rates (Y-o-Y)**



*Source: Central Bank of Egypt (CBE) & CAPMAS*

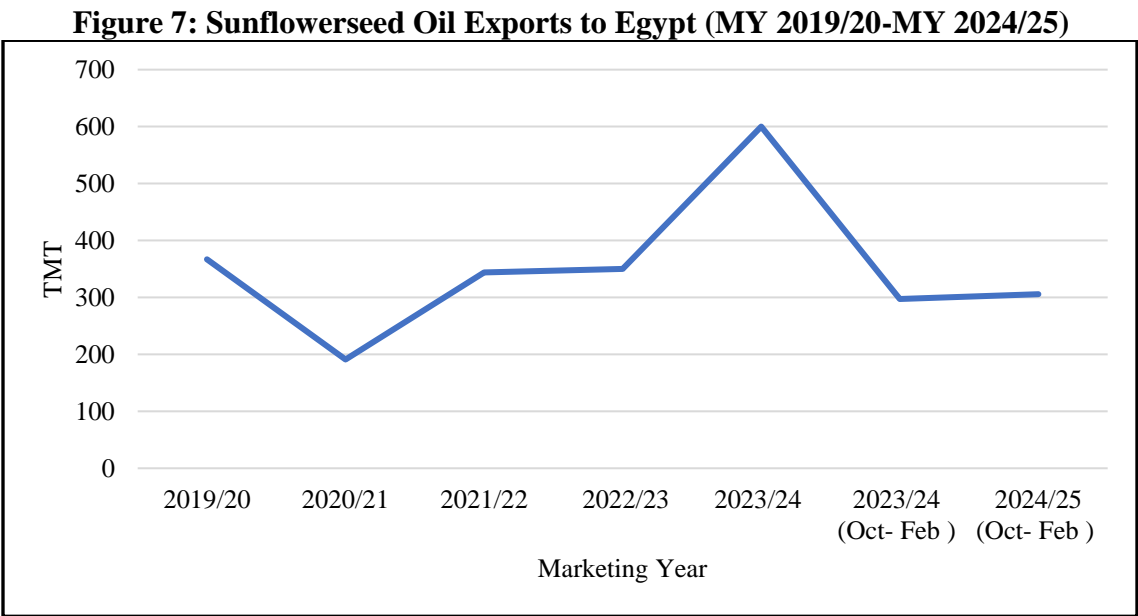
However, Post is revising downward its consumption estimate of sunflowerseed oil in MY 2024/25 to 620,000 MT from the previous estimate of 720,000 MT due to repercussions of inflationary pressures during 2023 and 2024, coupled with the devaluation of the Egyptian pound against the U.S dollar. This made imports more costly, thus causing a reduction in purchasing power during the first five months of the current marketing year.

## TRADE

FAS/Cairo forecasts Egypt's sunflowerseed oil imports in MY 2025/26 at 620,000 MT, up by 20,000 MT than the previous marketing year driven by forex availability and anticipated higher consumption by urban consumers.

Post is revising downward its trade estimate of sunflowerseed oil in MY 2024/25 to 600,000 MT from its previous trade estimate of 700,000 MT amid a reduction in domestic consumption impacted by higher prices. These prices have increased by almost 68.5 reaching \$1,200/MT in 2025, up from \$730/MT in 2020.

Egyptian importers are paying particular care to the selection of crude oils available on the international markets. Both the public and private sector opt for more affordable oil prices. Marketing year 2024/25 (October-March) sunflowerseed oil imports amounted to 305,828 MT compared to 297,000 MT during the same period in the previous marketing year (see Figure 7).



Source: USDA PS&D and FAS/Cairo Research

**STOCKS**

Post forecasts sunflower seed oil ending stocks in MY 2025/26 at 65,000 MT, less by 5,000 MT from Post’s estimate in the previous marketing year. The decrease in sunflower seed oil stock is due to a forecasted higher consumption. Carrying sunflower seed oil stock levels are held by both public and private sectors, but the private sector has a larger share.

## PALM OIL

### PRODUCTION, SUPPLY AND DEMAND DATA STATISTICS:

Oil, Palm Market Year Begins  Egypt	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	0	0	0	0	0	0
Area Harvested (1000 HA)	0	0	0	0	0	0
Trees (1000 TREES)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	98	98	108	108	0	133
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	1175	1175	1200	1200	0	1200
Total Supply (1000 MT)	1273	1273	1308	1308	0	1333
MY Exports (1000 MT)	5	5	5	5	0	5
Industrial Dom. Cons. (1000 MT)	60	60	70	70	0	70
Food Use Dom. Cons. (1000 MT)	1100	1100	1100	1100	0	1120
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	1160	1160	1170	1170	0	1190
Ending Stocks (1000 MT)	108	108	133	133	0	138
Total Distribution (1000 MT)	1273	1273	1308	1308	0	1333
Yield (MT/HA)	0	0	0	0	0	0
(1000 HA) ,(1000 TREES) ,(1000 MT) ,(MT/HA)						
OFFICIAL DATA CAN BE ACCESSED AT: <a href="#">PSD Online Advanced Query</a>						

### PRODUCTION

Egypt does not commercially cultivate oil palms, nor does it produce any palm oil.

### CONSUMPTION

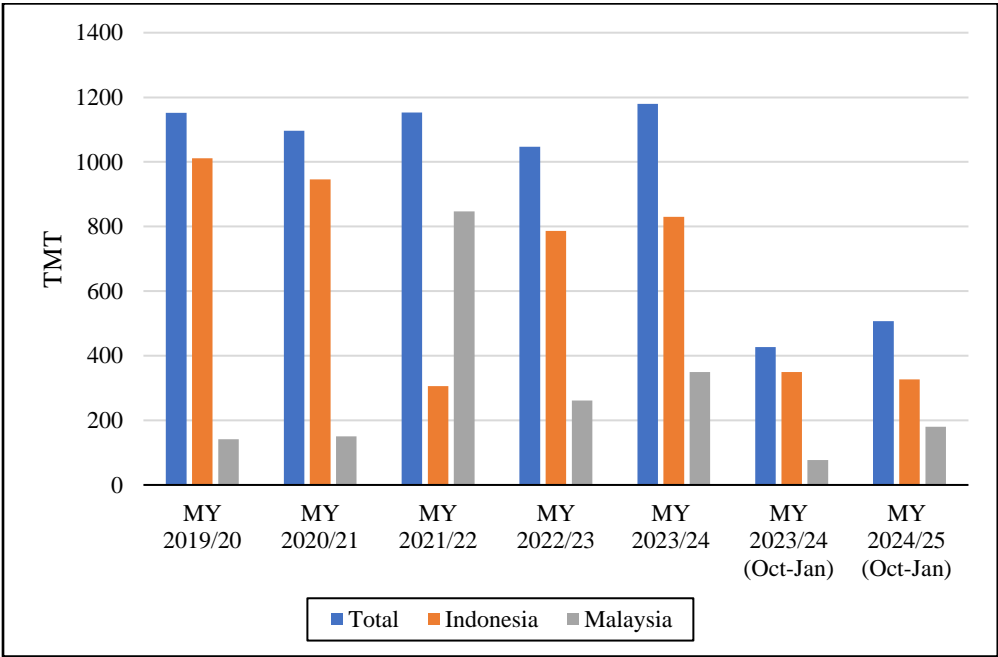
FAS/Cairo forecasts Egypt's palm oil consumption in MY 2025/26 (October-September) at almost 1.2 MMT. The increase in palm oil consumption is attributed to the growth in population and more use of palm oil the food processing sector.

Post estimates that 94 percent of palm oil goes to food production; vegetable shortenings account for 40 percent. Restaurants, catering companies, and fast-food chains utilize shortening extensively. The production of vegetable ghee accounts for 50 percent of palm oil use. Margarine accounts for three percent of use, mainly by private bakeries and patisseries.

TRADE

FAS/Cairo forecasts Egypt’s imports of palm oil in MY 2025/26 at 1.2 MMT, unchanged from Post’s estimate in the previous marketing year despite increased palm oil prices in the international market. As palm oil is an essential oil used in a variety of staple products in the food industry, fast-food chains, hotels and the processing sector, price fluctuation does not have as much of an impact in demand compared to other oils. Egypt imports palm oil from two major producing countries—Indonesia and Malaysia (see Figure 8). Almost all oil imported into Egypt is crude and then refined in Egypt.

Figure 8: Palm Oil Exports to Egypt (MY 2019/20-MY 2024/25)



Source: Trade Data Monitor LLC.

STOCKS

Post forecast palm oil ending stocks in MY 2025/26 at 138,000 MT, and up by 5,000 MT from the previous marketing year. The increase in palm oil stocks is due to a forecasted higher supply driven by a higher carry over from the previous marketing year and a stable import volume. Carrying palm oil stock levels are mainly held by the private oil industry

Attachments:

No Attachments