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Prepared By:

Approved By: Jenny Morgan

Report Highlights:

FAS/Cairo (Post) projects Egypt's wheat imports for marketing year 2026/27 at 12.5 million metric tons, a decrease from the previous year due to an expected increase in domestic production. In contrast, corn imports are forecast to rise in marketing year 2026/27 to support the expanding poultry and feed industries. U.S. corn is regaining a presence in the Egyptian market, driven by competitive pricing and superior quality. Rice production is expected to remain steady compared to last year, with exports likely to continue to regional markets.

WHEAT

Production

Wheat production in MY 2026/27 (July – June) is estimated at 9.8 MMT, up by 6.5 percent from MY 2025/26. This is due to area harvested, increasing to 1.5 million hectares (HA) compared to 1.33 million HA during MY 2025/26. The increase in area is driven by higher procurement prices which encouraged farmers to sow additional areas with wheat. In Egypt, wheat is generally planted in November and harvested in April through mid-July. The Ministry of Agriculture and Land Reclamation's (MALR) Agriculture Research Center (ARC) continues to focus on boosting crop yields per unit of land through several strategies:

- Promoting high-yielding wheat varieties that use water more efficiently.
- Official procurement prices announced before planting season to incentivize cultivation and ensure immediate payment.
- Annually releasing a list of wheat varieties to be planted in four geographical regions which helps streamline extension services, thus improving production.
- Distributing more certified wheat seeds to farmers.
- Creating demonstration fields nationwide that showcase best agricultural practices.
- Encouraging farmers to adopt raised bed cultivation for wheat. The raised bed method offers significant benefits—it cuts water use by 25 percent, reduces seed requirements by 15 percent, and produces more uniform crops with higher yields.
- Streaming delivery of subsidized fertilizers and other inputs to qualified beneficiaries.
- Providing mechanized assistance throughout the entire cultivation cycle.
- Enhancing silos and warehousing for storage capacity, minimizing losses and increasing shelf life.

Domestic Wheat Procurement: Government procurement prices directly influence planting decisions—higher prices encourage farmers to expand wheat cultivation and sell to government buyers. On August 27, 2025, the Government of Egypt (GOE) set a procurement price ranging between 2,250-2,350 Egyptian pounds (EGP) per ardeb (1 ardeb=150 kilograms) or $313.8-$327.75/MT depending on degree of purity and moisture levels.

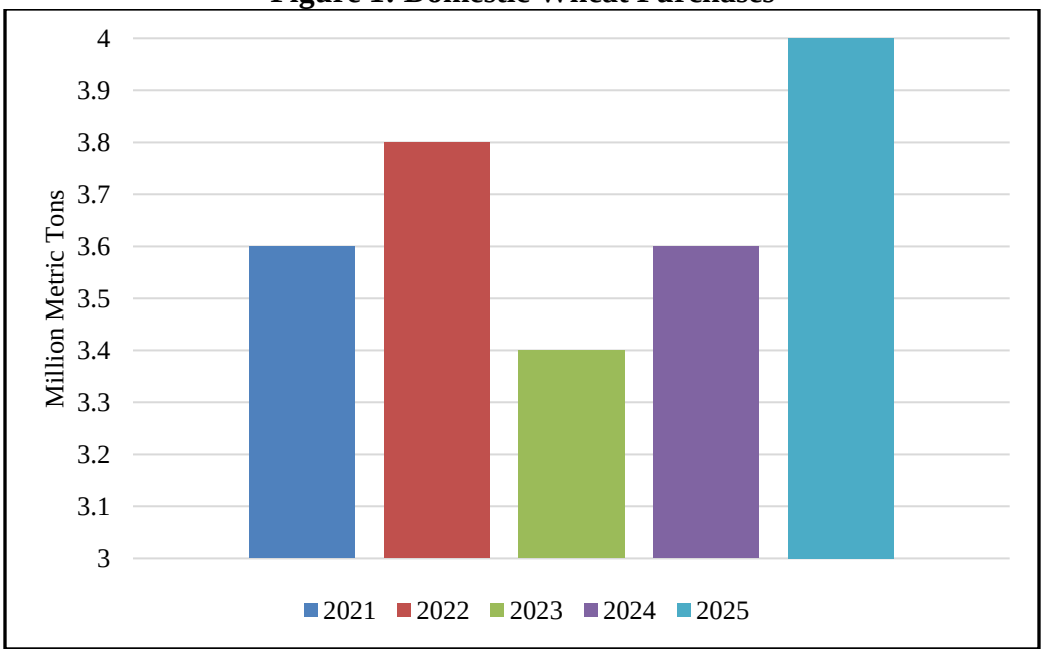
Wheat procurement season usually starts in mid-April and lasts until mid-July to allow farmers more time to submit their wheat harvest to government collection centers. The General Authority for Supply Commodities (GASC) is responsible for domestic wheat procurement for the Egyptian government and does so through five government entities:

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
5- The Future of Egypt Authority for Sustainable Development (FEASD)

Egypt operates one of the world's largest wheat procurement programs. The government purchases domestic wheat to supply its subsidized bread program, which provides low-cost

subsidized bread to millions of Egyptians. During 2025, the GOE procured 4.0 MMT higher than the five-year average amount (see Figure 1). This was due to more favorable procurement prices and increased capacity for wheat storage.

Figure 1: Domestic Wheat Purchases



Source: FAS/Cairo Research

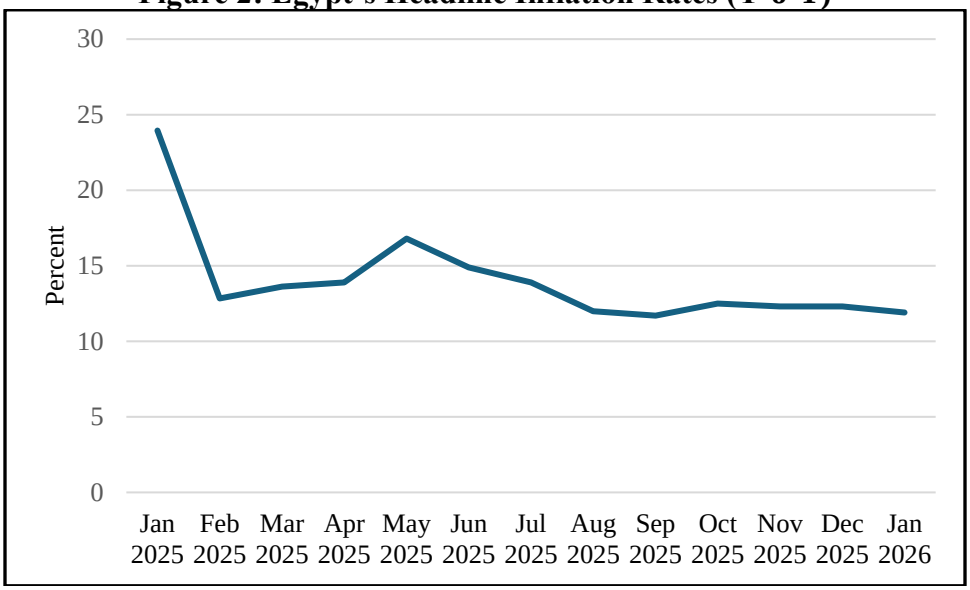
Consumption

Total wheat consumption in MY 2026/27 is estimated at 20.3 MMT, slightly up from MY 2025/26 due to a 300 TMT increase in 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 and nine million migrants, according to the Central Agency for Public Mobilization and Statistics (CAPMAS).[1]

Post lowered its previous estimate for MY 2025/26 for total wheat consumption by approximately 1.5 percent due to existing inflationary pressures in Egypt which caused some consumers to lower their consumption of baked products. Fortunately, inflationary pressures have started to decrease, with headline inflation dropping to 11.9 percent in January 2026 compared to 23.2 percent during the same month in 2025 (see Figure 2). The high inflation rate for food has also dropped significantly to 1.5 percent in January 2026, compared to 20.2 percent in January 2025, indicating improved market dynamics. Month-to-month price pressures continue, warranting a cautious long-term outlook despite the improvement.

[1] الإحصاء: مصر تسجل 750 ألف نسمة زيادة في عدد سكانها خلال 196 يوما -جريدة المال

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



Source: Central Bank of Egypt (CBE)

According to CAPMAS, inflation levels for baked products and cereals have decreased from 21.5 percent in January 2025 to 2.8 percent in January 2026. Although still high, the inflation rate is projected to decline by the end of 2026 due to improved access to foreign currency and a tight monetary policy.

Egypt's baked goods sector is set for consistent expansion, fueled largely by population growth. Growing urbanization is also transforming buying patterns to purchase healthier, individual baked goods, expanding beyond the consumption for basic flat bread. This is particularly driven by consumers who seek more nutritious products such as those which add high-fiber, whole grain, and fortified options.

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 remains unchanged since 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. NOTE: the Egyptian government compensates bakeries for the difference (89 percent) in the production costs. Prior to June 1, 2024, the government subsidized 96 percent of the cost of producing the bread.

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 Ministry of Supply and Internal Trade (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.[2]

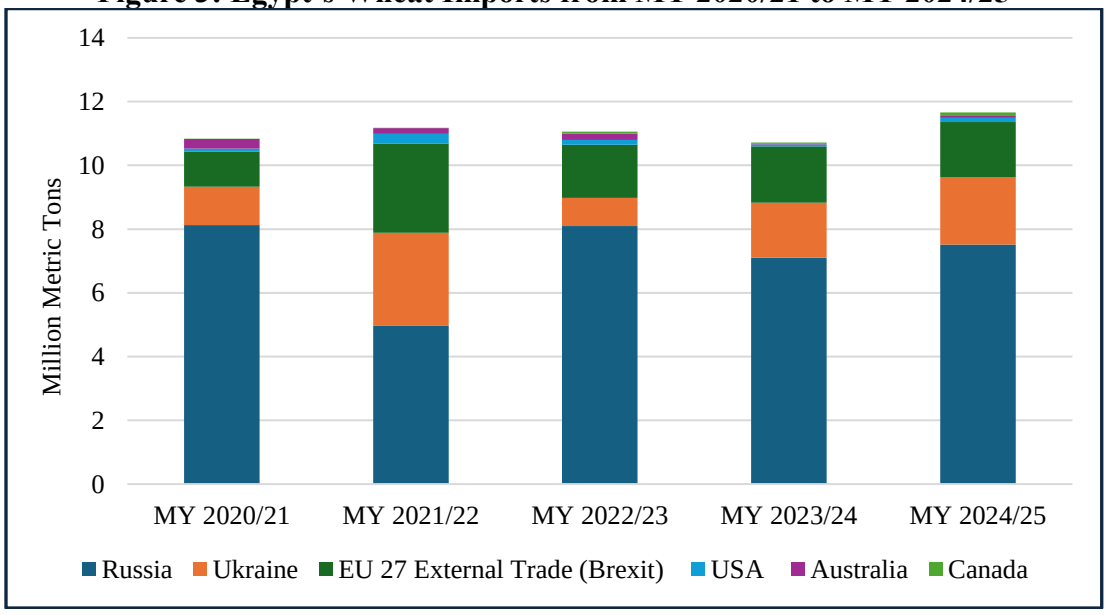
Alternate Egyptian Flour Subsidy Program: In addition to the subsidized bread program, the subsidy program permits beneficiaries to obtain 10 kilograms of subsidized flour per month, per person, at a price of 30 EGP, as an alternative to subsidized bread. This is commonly utilized in rural villages in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

TRADE

Egypt's wheat imports in MY 2026/27 are estimated at 12.5 MMT, down by approximately 1.6 percent from the previous marketing year due to increased domestic production. 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.

During the past five years, major suppliers of wheat to Egypt were Russia (35.8 MMT), EU (9.0 MMT) and Ukraine (8.85 MMT) (see Figure 3). From July 2025 to January 2026, Egypt imported 8.8 MMT of wheat: Russia supplied 5.28 MMT, Ukraine supplied 2.16 MMT, and the European Union supplied 1.12 MMT.

Figure 3: Egypt's Wheat Imports from MY 2020/21 to MY 2024/25



Source: FAS/Cairo Research

Private Wheat Imports vs Public Imports for Subsidized Bread: Over the last three years, private companies have captured a larger share of Egypt's wheat import market. This growth

[2] https://www.almasryalyoum.com/news/details/4162601

stems from their expanded flour production for regional exports and distribution to private bakeries and cafes that make premium products. In MY 2024/25, private sector wheat imports represented 63 percent of Egypt's total wheat imports—a significant increase driven by better economic conditions and competitive international prices. The private milling sector now leads imports of U.S. wheat. Since 2020, private companies have imported 740 TMT of U.S. wheat for milling high-quality flour used in various baked goods and pasta production.

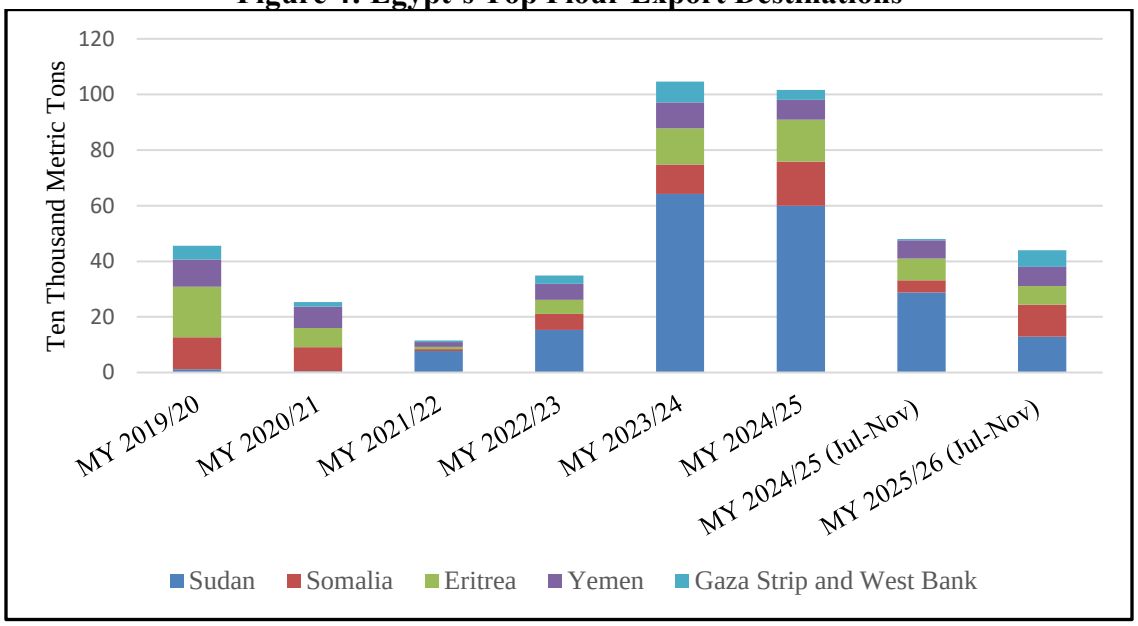
From July 2025 to January 2026, private sector imports of wheat amounted to almost 5.4 MMT, representing 60.3 percent of total wheat imports thus far, while government wheat imports via FEASD amounted to 39.6 percent. The FEASD has become a key player in Egypt's food security system, leading efforts to enhance wheat supply for subsidized bread.

The FEASD streamlined wheat imports by creating a unified procurement department with MIST and MALR to also reduce reliance on smaller suppliers and local traders. During MY 2024/25, the FEASD contracted 4.7 MMT of wheat—21.6 percent less than the 6.0 MMT GASC purchased through tenders in MY 2023/24.

Wheat Flour Exports

Estimated wheat flour exports in MY 2026/27 amount to 1.2 MMT, up by 20 percent from Post's estimate in MY 2025/26 due to plans to expand to new markets in Africa. 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. However, Egypt's exports to top five destinations in MY 2025/26 dropped by almost 8.6 percent driven by significant reductions in flour exports to Sudan, which saw resumption of operations in major milling capacities (see Figure 4).

Figure 4: Egypt's Top Flour Export Destinations



Source: Trade Data Monitor LLC

STOCKS

Ending stocks in MY 2026/27 are estimated at 4.57 MMT, up by 21.2 percent from Post's MY 2025/26 estimate due to steady, high imports and a significant increase in production.

Wheat	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jul 2024		Jul 2025		Jul 2026	
Egypt	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	1300	1300	1330	1330	0	1500
Beginning Stocks (1000 MT)	3796	3796	2872	2872	0	3772
Production (1000 MT)	9000	9000	9200	9200	0	9800
MY Imports (1000 MT)	12428	12428	13000	12700	0	12500
TY Imports (1000 MT)	12428	12428	13000	12700	0	12500
Total Supply (1000 MT)	25224	25224	25072	24772	0	26072
MY Exports (1000 MT)	2352	2352	2000	1000	0	1200
TY Exports (1000 MT)	2352	2352	2000	1000	0	1200
Feed and Residual (1000 MT)	1000	1000	1000	1000	0	1000
FSI Consumption (1000 MT)	19000	19000	19000	19000	0	19300
Total Consumption (1000 MT)	20000	20000	20000	20000	0	20300
Ending Stocks (1000 MT)	2872	2872	3072	3772	0	4572
Total Distribution (1000 MT)	25224	25224	25072	24772	0	26072
Yield (MT/HA)	6.9231	6.9231	6.9173	6.9173	0	6.5333

(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

Post forecasts Egypt's corn production for MY 2026/27 (October-September) at 7 MMT, a slight increase from the MY 2025/26 estimate of 6.7 MMT. This increase stems from expected higher yields per unit area driven by several factors—new white corn hybrids developed by private companies and farmers gaining experience in pest management programs that control major corn pests, including *fall armyworm*. Additionally, strong demand for large animal and poultry feed will continue to encourage farmers to adopt modern agricultural practices recommended by ARC.

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 2026/27 at 17.4 MMT, a slight increase over the MY 2025/26 estimate of 16.9 MMT. This growth is attributed to the expanding poultry sector, supported by improved foreign exchange availability and increased feed supplies. Post has also

revised its previous estimate for MY 2025/26 corn consumption upward by 2.42 percent, reflecting continued growth in the poultry industry, which remains the primary driver of feed and corn demand. The Egyptian wet milling sector processes 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 anticipates poultry sector feed consumption to grow, as large poultry feed companies, especially those with integrated operations including broilers, breeding stock, slaughterhouses, and hatcheries—have begun operating more efficiently. This efficiency stems from lower feed production costs driven by foreign exchange availability, which boosted feed raw material imports. Some companies are now investing in new projects for chick production, broiler operations, and egg production. The government is also expanding license approvals for livestock, poultry, and fodder projects as part of its broader plan to increase domestic production of milk, as well as red and white meat.[3]

During calendar year 2025, Egypt's poultry sector produced 1.6 billion broiler chickens through commercial operations and an additional 320 million chickens through rural production, covering 97 percent of domestic broiler demand. The sector also produced 16 billion table eggs, equivalent to 140 eggs per capita. This represents significant growth from pre-2023 levels, when the sector produced 1.4 billion birds and 14 billion eggs annually.[4]

Egypt also leads Africa in aquaculture production, producing nearly 1.6 MMT of fish annually. Aquaculture accounts for roughly 80 percent of Egypt's total fish production, primarily through private farms. However, the sector faces several challenges: competition for water resources, limited awareness of fish disease management practices, and inadequate processing facilities.

Major investments by both government and private companies in fish farming infrastructure—including advanced farms, hatcheries, and processing plants—create demand for specialized feeds that help fish grow faster and improve production. These drive continued development of feeds designed for different types of fish. Industry forecasts project aquaculture feed market demand will exceed 2.0 MMT by 2032.

Current annual fish feed demand ranges between 1.4 and 1.5 MMT. Major dietary energy sources in aquaculture feed include yellow corn (20-25 percent), wheat bran (20-30 percent), rice bran (10-25 percent), and vegetable oils (1-5 percent). Feed formulation depends on the protein and energy content requirements, ingredient availability and prices, and the specific fish species and sizes being raised.

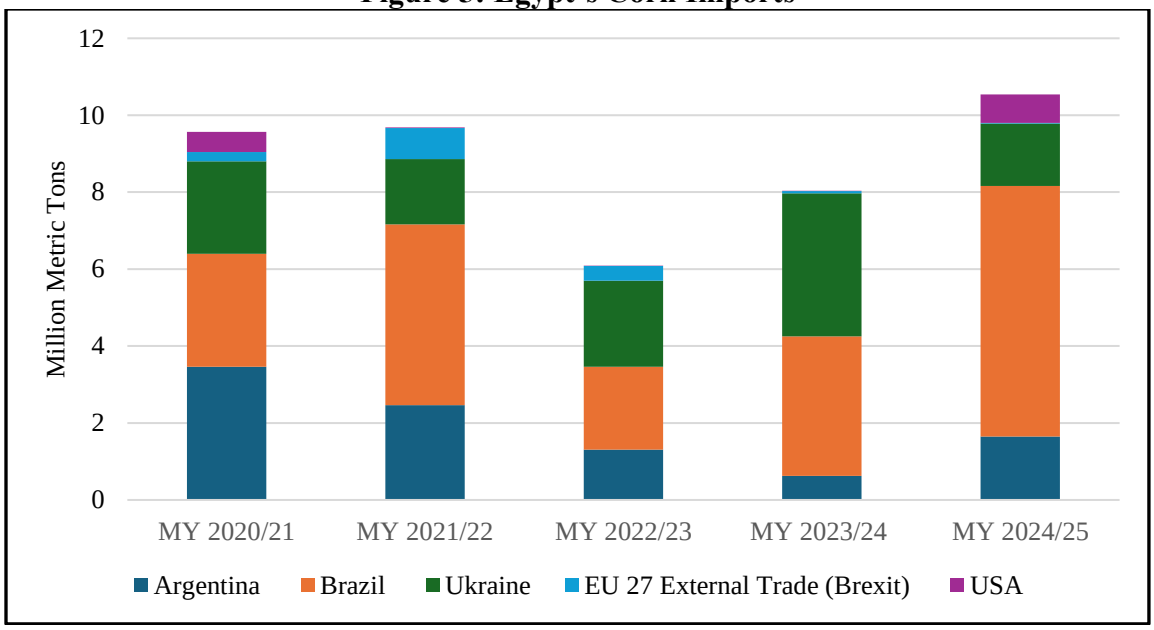
TRADE

Post forecasts Egypt’s corn imports in MY 2026/27 at 10.5 MMT, up by 300 TMT from Post’s estimate for MY 2025/26, driven by new investments in the poultry sector as well as feed production. Post is also revising MY 2025/26 corn imports up to 10.2 MMT, due to the availability of forex increasing the facilitation of imports, allowing for more corn and livestock feed supply.

[3] https://agri2day.com/2026/01/18
[4] https://www.elwatannews.com/news/details/8233757#goog_rewarded

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 (19.9 MMT), Ukraine (11.7 MMT), and Argentina (9.5 MMT) (see Figure 5). In marketing year 2024/25, U.S. corn exports to Egypt rebounded significantly, reaching 740,000 metric tons. This resurgence is driven by improved product quality, competitive pricing, and the high efficiency of U.S. corn in industrial starch production, all of which have strengthened the appeal of U.S. corn in the Egyptian market.

Figure 5: Egypt's Corn Imports



Source: Trade Data Monitor, LLC.

STOCKS

Post forecasts Egypt's ending corn stocks in MY 2026/27 at 1.79 MMT, up by 5.8 percent from Post's estimate in MY 2025/26 due to an anticipated increase in imports and slight increase in local production.

Corn	2024/2025		2025/2026		2026/2027	
Market Year Begins	Oct 2024		Oct 2025		Oct 2026	
Egypt	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	920	920	850	850	0	850
Beginning Stocks (1000 MT)	1429	1429	1692	1692	0	1691
Production (1000 MT)	7000	7000	6700	6700	0	7000
MY Imports (1000 MT)	10564	10564	10500	10200	0	10500
TY Imports (1000 MT)	10564	10564	10500	10200	0	10500

Total Supply (1000 MT)	18993	18993	18892	18592	0	19191
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)	14700	14700	14500	14300	0	14800
FSI Consumption (1000 MT)	2600	2600	2600	2600	0	2600
Total Consumption (1000 MT)	17300	17300	17100	16900	0	17400
Ending Stocks (1000 MT)	1692	1692	1791	1691	0	1790
Total Distribution (1000 MT)	18993	18993	18892	18592	0	19191
Yield (MT/HA)	7.6087	7.6087	7.8824	7.8824	0	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

OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query

RICE

PRODUCTION

Post forecasts Egypt's milled rice production and area harvested in MY 2026/27 (October – September) unchanged from Post's estimates in MY 2025/26. Egypt's Ministry of Water Resources and Irrigation's (MWRI) usually issues an annual decree designating rice areas in certain governorates in the Delta. However, 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. Egyptian farmers primarily grow short and medium-grain japonica rice varieties, with production concentrated in the Nile Delta region.

Rice production in Egypt is vulnerable to environmental factors. Higher temperatures, shifting rainfall patterns, and extreme weather events threaten to lower yields and worsen water shortages. The Nile Delta—Egypt's primary rice-growing region—is especially at risk from rising sea levels and increased soil salinity. The Egyptian government, together with international partners, is investing in research and development to enhance rice resilience. Efforts include developing new rice varieties capable of tolerating elevated temperatures and higher soil salinity.

Rice cultivation in the Nile Delta plays a vital role in preventing seawater from encroaching onto Delta lands and in reducing soil salinity. The ARC's early maturing rice varieties can be harvested in just three months and require only 9,000–10,000 cubic meters of water per hectare, compared to 14,000–15,000 cubic meters for traditional varieties.

Despite existing challenges, rice cultivation in Egypt has promising prospects for growth and innovation. By embracing faster-growing varieties, modern agricultural methods—such as precision farming and sustainable water management—Egypt can maintain efficient rice production while safeguarding its limited water supplies. Additionally, there is increasing interest in organic rice farming, fueled by global demand for sustainable and environmentally friendly food products. Egyptian farmers are beginning to adopt organic cultivation techniques, which could create new export opportunities and access to emerging markets.

CONSUMPTION

Post forecasts Egypt's rice consumption and residual at 4 MMT in MY 2026/27, like 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 is a fundamental part of the Egyptian diet, eaten daily in most households in the northern Delta and coastal cities where the traditional plate consumed in these areas is fish and rice. It also serves as the foundation for one of the famous traditional plates in Egypt known as "Koshari" (consisting of rice, lentils, and pasta).

The rice value chain in Egypt is largely controlled by private entities, with prices determined by market supply and demand. Since rice can be easily stored in paddy form, some farmers and traders hold onto their stocks before major religious holidays to drive up prices and maximize profits. However, when consumers—particularly in greater Cairo—switch to less expensive carbohydrate options like pasta or potatoes, rice stocks are released back into the market, leading to increased availability and lower prices.

The rice market consists of several segments, including medium- and short-grain Egyptian white rice (milled), brown rice, parboiled rice, aromatic imported varieties such as basmati and jasmine, and organic rice. Of these, milled white rice is the most popular, favored for its versatility and suitability for daily meals. Demand for long-grain and basmati rice is also increasing, driven by health-conscious consumers looking for nutritious alternatives.

The local rice market remains stable, with existing stocks and new harvest expected to cover consumption needs through end of year. During the month of Ramadan, the Ministry of Supply and Internal Trade ensures ample rice supplies in its consumer outlets and Ramadan exhibitions by offering discounts of up to 20-25 percent per KG depending on brand and quality. These measures have prevented price hikes in the open market and promoted competition, ultimately benefiting consumers. Current rice prices in government affiliated stores are 24.0 EGP/Kg for packaged rice, while prices of packaged rice in the retail market hover between 27-33 EGP/Kg depending on brand, grade and quality. Paddy rice prices have also been stable during the past year hovering around 16,000-17,000 EGP.

TRADE

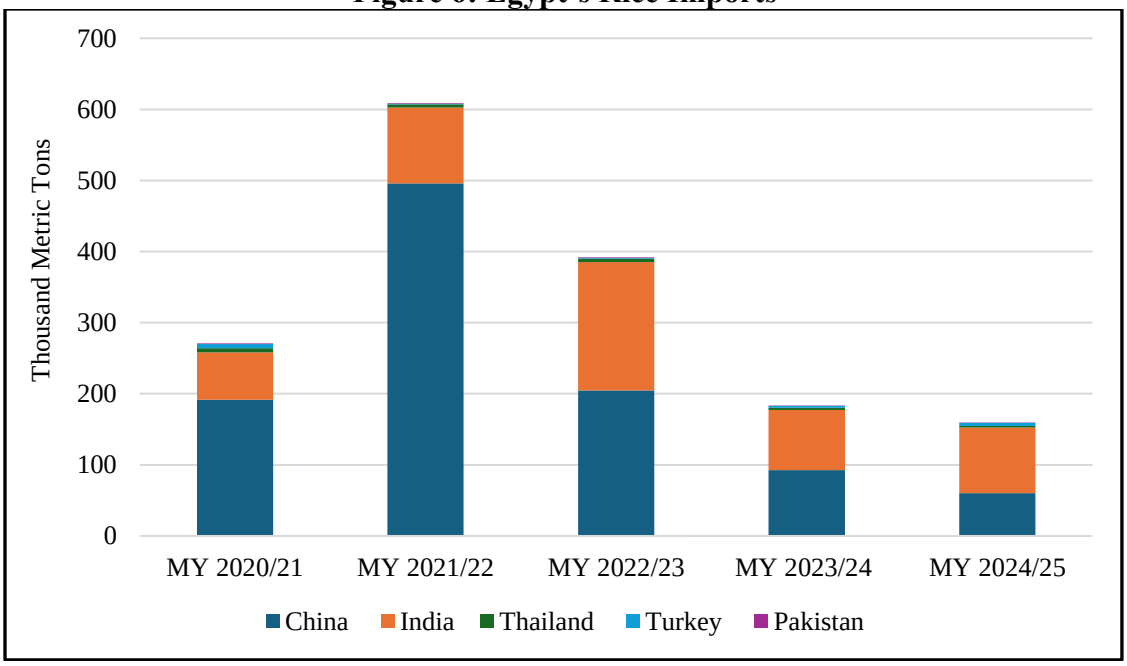
Post forecasts Egypt's rice imports in MY 2026/27 at 130 TMT, unchanged from Post's estimate in MY 2025/26 due to similar production and consumption levels.

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 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), Turkey, and

Pakistan. During the past five marketing years, Egypt's top rice imports were from China (1.0 MMT) India (530,900 MT), Thailand (21,100 MT), Turkey (14,640 MT) and Pakistan (3,473 MT) (see Figure 6).

Figure 6: Egypt's Rice Imports



Source: Trade Data Monitor

Egypt's Rice Exports: Although Egypt has maintained a ban on rice exports since 2016, the government permits the export of limited quantities of white rice when there is a domestic surplus. These exports are governed by specific regulatory conditions according to Egyptian Customs Authority Circular No. (3) of 2025, allowing Egypt to benefit from foreign markets while safeguarding domestic market.[5] Rice exports were permitted to regional destinations after getting approval from the Egyptian cabinet. Rice exports are likely to continue in MY 2026/27 at 150 TMT, despite an export ban still in effect. According to CAPMAS, almost 154 TMT of milled rice was exported during MY 2024/25 to major destinations such as Morrocco (61,656 MT), Sudan (36,440 MT), Syria (20,476 MT), Lebanon (10,373 MT) and Libya (5,476 MT).

STOCKS

Post forecasts Egypt's ending rice stocks in MY 2026/27 to reach 671 TMT, up from the previous marketing year's estimate of 491 TMT. The increase is driven by the carry-over from MY 2025/26.

Rice, Milled	2024/2025		2025/2026		2026/2027	
Market Year Begins	Oct 2024		Oct 2025		Oct 2026	
Egypt	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	670	670	720	720	0	720
Beginning Stocks (1000 MT)	455	455	311	311	0	491

[5] Despite the ban, the government allows rice exports at $750 per ton, and the surplus production supports stability

Milled Production (1000 MT)	3900	3900	4200	4200	0	4200
Rough Production (1000 MT)	5652	5652	6087	6087	0	6087
Milling Rate (.9999) (1000 MT)	6900	6900	6900	6900	0	6900
MY Imports (1000 MT)	160	160	125	130	0	130
TY Imports (1000 MT)	200	200	125	130	0	130
Total Supply (1000 MT)	4515	4515	4636	4641	0	4821
MY Exports (1000 MT)	154	154	150	150	0	150
TY Exports (1000 MT)	150	150	150	150	0	150
Consumption and Residual (1000 MT)	4050	4050	4100	4000	0	4000
Ending Stocks (1000 MT)	311	311	386	491	0	671
Total Distribution (1000 MT)	4515	4515	4636	4641	0	4821
Yield (Rough) (MT/HA)	8.4358	8.4358	8.4542	8.4542	0	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 2026/2027 = January 2027 - December 2027

OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query

Attachments:

No Attachments