

Saudi Arabia Agribusiness Report Q2 2016

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Abstracts

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BMI View: Saudi Arabia will increasingly be dependent on grains imports, as the country has decided to phase out domestic grains production in a bid to preserve the country's water supply. The government has not abandoned its strategy of self-sufficiency in poultry and has been ramping up incentives to expand production capacity. This strategy has paid off, as the three major producers in the sector have all started heavy investment initiatives. We believe Saudi Arabia will find sufficient grains supply from the Black Sea region and the EU to supply its meat and food processing industry in the coming years. However, the country will remain highly vulnerable to volatile grains and feed prices. Recent spikes in feed prices have turned us more cautious on margins for dairy and livestock producers in the country, especially those that import inputs from abroad.

Key Forecasts

Wheat production growth to 2019/20: -93.3% to 30,000 tonnes. Wheat production will be almost completely phased out in the coming years and Saudi Arabia will become entirely dependent on imports for its grain needs.

Beef consumption growth to 2020: 14.7 to 236,500 tonnes. Beef consumption will not grow as fast as poultry in the coming years, as beef meat remains more expensive than chicken. However, the expansion in GDP per capita and population will support a moderate increase in beef demand.

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SWOT

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