

# **Insights from MEWA** **Statistical Report - 2023**

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# Who We Are

We are a leading investor in businesses across the global agrifood value chain. By improving access to essential foods, we add long-term value to cultivate the future. Our responsible practices enhance stability, drive growth, and strengthen food security nationally and globally.

By fostering innovation and sustainability, we support the development of resilient food ecosystems. Our comprehensive approach includes expanding local and international agri-food investments, enhancing production, and securing reliable food supplies to meet the evolving demands of the global market.

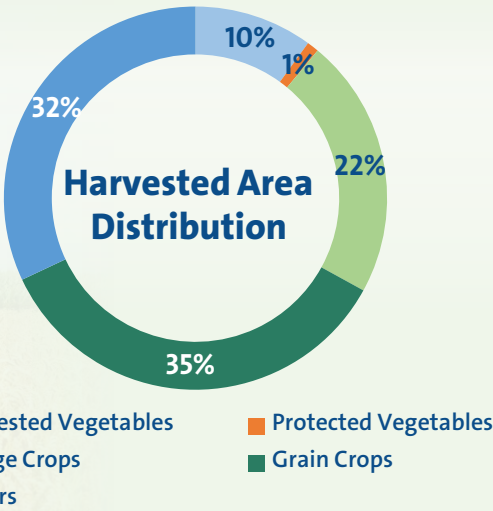
Our mandate includes investing both within and outside Saudi Arabia to support food security by supplying essential food and stabilizing prices, achieved through our subsidiaries and partnerships.

# SALIC at Glance



# Crop yields surged on the back of technology adoption and growth in protected cultivation

Crop Category	Cultivated Area (Hectares)	Total Production (Tons)	Yield Per Hectare (Tons)
Harvested Vegetables	88,736	2,530,972	28.5
Protected Vegetables	7,043	719,984	102.3
Forage Crops	198,567	3,802,019	19.1
Grain Crops	310,711	1,633,264	5.3
Grand Total	893,365	11,561,317	12.9



Multiple greenhouse initiatives and Technology Adoption Programs led to a **77%** increase in production of protected vegetables

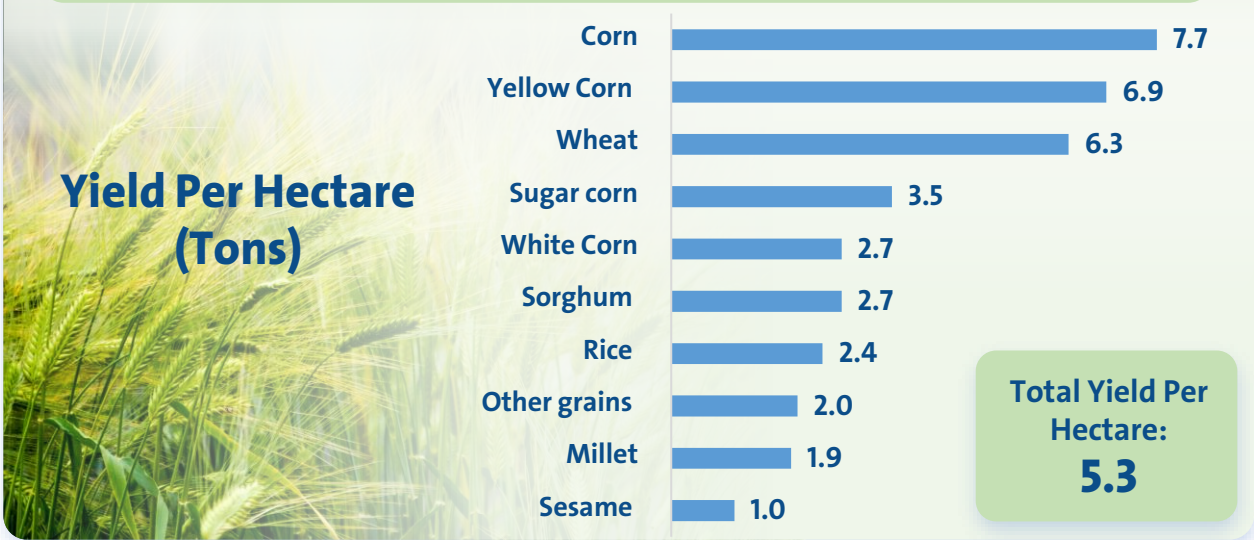
Conventional production stayed stable, and emphasis was put on improving self-sufficiency in line with achieving food security goals of 2030 vision

Despite accounting for only **1%** of the harvested area, Protected Vegetables account for **8%** of the total crop production



# On back of bumper wheat crop, Saudi Arabia achieved record grain production in 2023

Grain Type	Cultivated Area (Hectares)	Total Production (Tons)
Wheat	210,102	1,314,427
Sorghum	58,305	157,423
White Corn	12,923	34,459
Corn	8,327	63,722
Millet	7,061	13,235
Yellow Corn	5,306	36,544
Sesame	4,296	4,214
Rice	386	908
Sugar corn	216	754
Other grains	3,789	7,578
Total	310,711	1633,263



- Surge in Wheat production was driven by:

- Higher guaranteed price
- Expanded harvest area
- Policy to purchase up to 1.5 million tons of wheat by the government

Wheat’s superior yield suggests adaptability to local weather, however, the production accounts for less than 30% of the total local consumption needs

Domestic corn production increased sharply in 2023 but still covers less than 5% of total national demand

Record 1.6M MT grain production in 2023



Fruit production has maintained its upward trend, with dates accounting for the largest share

Crop Type	Cultivated Area (Hectares)	Total No. of Trees	Total Fruiting Trees	Total Production Quantity (Tons)	Total Demand (Tons)
Dates	234,124	37,160,827	30,504,080	1,903,102	1,599,245
Olives	22,310	20,900,419	17,330,140	339,015	339,954
Grapes	4,800	7,135,336	6,184,448	121,733	183,068
Lemons	5,131	1,842,774	1,532,810	118,026	262,280
Mangoes	7,154	1,629,568	1,092,175	96,111	130,915
Pomegranates	1,888	1,492,690	1,270,329	35,571	59,878
Bananas	1,200	1,524,777	1,190,099	35,703	72,965
Figs	1,422	679,032	551,242	28,159	25,791
Peach	1,754	510,000	485,000	34,201	39,669
Other Indoor Trees	8,524	5,485,707	3,988,674	163,457	171,581
Total	288,307	78,361,130	64,129,060	2,875,078	2,867,810

Dates stand out due to their **significant cultivation area and high production** output, marking them the most lucrative and efficient crop

The total yield stood at **10 tons** per hectare, marking an upward trajectory.



Achieving aggregate self-sufficiency remains a challenge, despite consistent year-over-year growth in vegetables and fruits

Crop Type	Self-Sufficiency (%)	Exports (Tons)	Imports (Tons)	Local Production (Tons)	Local Demand (Tons)
Dates	119	309,345	11,152	1,903,102	1,599,245
Eggplants	107	7,890	66	117,330	109,654
Okra	106	1,599	75	27,740	26,170
Cucumbers	102	5,048	673	229,575	225,074
Zucchini	100	1,822	2,045	80,642	80,642
Watermelons	98	151	11,035	613,632	626,155
Pumpkin	95	2	3,952	70,000	73,684
Potatoes	87	334	94,513	621,751	714,656
Bell Peppers	83	4,448	28,559	119,109	143,505
Cantaloupe	80	9	15,813	63,060	78,825
Tomatoes	76	591	217,781	691,875	910,362
Carrots	60	5,541	42,148	55,000	91,667
Onions	51	1,150	306,241	313,496	614,698
Lemons	45	11,585	156,294	118,026	262,280

Level of Self-Sufficiency:

Self-Sufficient (≥100%)  
Strong local production, minimal import reliance

Partially Self-Sufficient (81% - 99%)  
Balanced mix of domestic production and imports

Import-Reliant (<80%)  
Import dependence, opportunity to localize

Continued export momentum and government-backed **date cluster development programs** drove record production and a **119%** self-sufficiency rate in Dates.

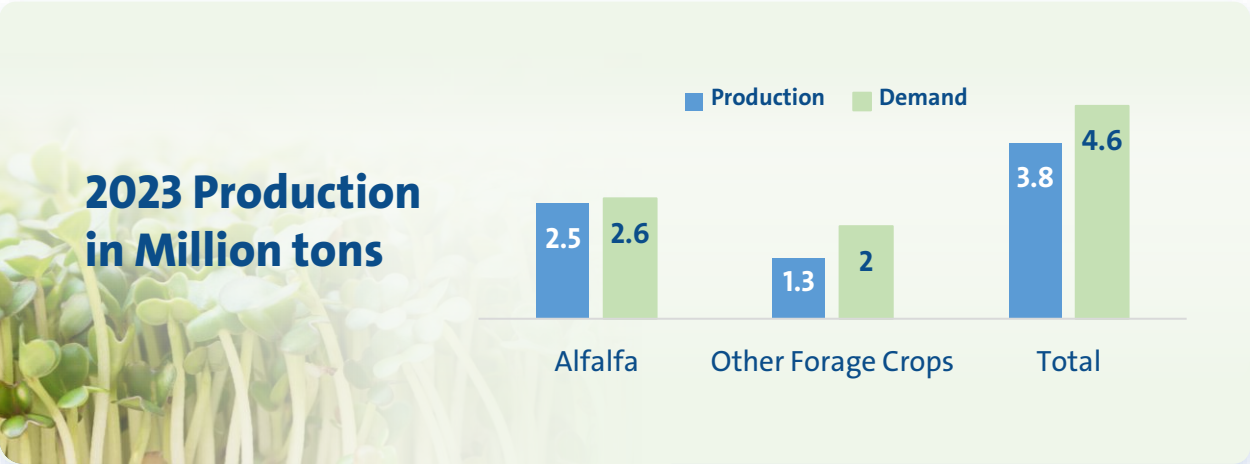
Through increased protected farming, potato production observed modest increase but **13%** of demand still needed to be met through imports.

Despite high demand, production for onions lags due to **high water requirements**, limited cold storage infrastructure, and lower margin vs. other crops, keeping the self-sufficiency at **51%**

Source: SALIC Research (MEWA Statistical Book 2023)

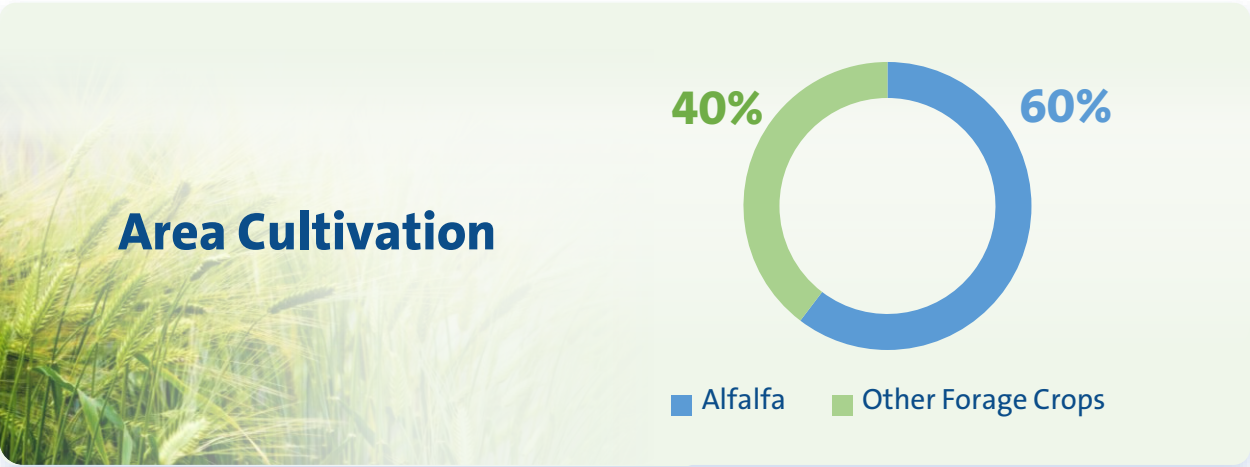
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Domestic production of Alfalfa has been curtailed due to a government-imposed ban; however, limited-scale production continues



**Total forage crop production reached 3.8 million tons** across 198,567 hectares, achieving an average yield of **19.14** tons per hectare

**Alfalfa** dominates, producing nearly 2.5 million tons (65.7% of total) from 119,823 hectares, making up **60.3%** of the forage cultivation area



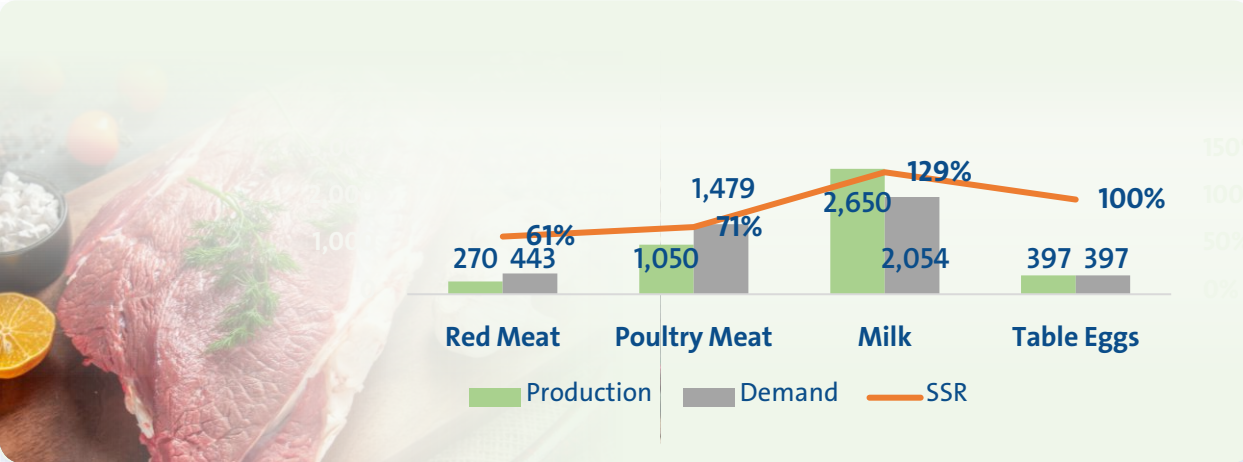
Alfalfa cultivation has **been gradually phasing out since 2016**, following policy reforms aimed at conserving critical water resources

Despite restrictions, Alfalfa’s domestic production still meets more than **80%** of total demand, with the remaining fulfilled through imports





While animal protein has demonstrated consistent growth, fish, poultry, and red meat are still far from achieving self-sufficiency



Red Meat self sufficiency has grown by more than **50%** in the last 4 years contributed by government support and infrastructure projects like Hafr Al-Batin Livestock City

Saudi Arabia has achieved continued **self sufficiency since in dairy since the last 10 years** achieved through a set of following measures

- **Government policies** to support food security.
- Major companies like **Nadec and Almarai** adopting vertically integrated models.
- Technological advancement leading to higher production

Seafood

Category	Fish	Shrimp	Total
Local Production (Tons)	134,534	80,115	214,649
Net Imports (Total Imports - Total Exports) (Tons)	147,208	(25,793)	121,415
Total Demand (Tons)	281,742	54,322	336,064
Self-Sufficiency Ratio (%)	48%	147%	64%

Shrimps account for the highest **Self Sufficiency Ratio (SSR)** numbers across all animal protein

For fish, astounding growth of **80%** has been observed in production but the overall SSR remains a challenge due to high demand

# Glossary

Terms	Definition
Yield per Hectare	Average yield in tons per hectare. Often used to refer to productivity of agricultural products
Protected Farming	Farming under controlled conditions to optimize growth and reduce external risks.
Greenhouse Initiatives	Programs promoting controlled-environment farming to improve crop yields.
Self Sufficiency Ratio	Percentage of domestic production compared to total national consumption.
Guaranteed Price	Minimum price set by government to protect producers from market volatility.
Hafr Al-Batin Livestock City	KSA Government-backed project supporting livestock production and related services.





# Thank you!

