

Saudi Arabia Alfalfa - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Saudi Arabia Alfalfa Market size is estimated at USD 2.21 billion in 2025, and is expected to reach USD 2.85 billion by 2030, at a CAGR of 5.2% during the forecast period (2025-2030).

Over the medium term, factors including rising demand for quality hay for livestock and dairy production, prices of alfalfa hay, and health benefits of alfalfa over other alternative feed are expected to drive the market growth in the coming years. Livestock products remain the desired food for nutritional value and taste across major parts of Saudi Arabia.

Livestock products remain the desired food for nutritional value in major parts of Saudi Arabia. The consumption of animal products, such as milk, cheese, and meat, is increasing across KSA, which is attributed to the increasing awareness about cutting down their consumption of fatty and high-calorie foods, thereby shifting to healthy dairy products. The high demand for quality products is increasing the demand for quality feed, which, in turn, is driving the market for alfalfa, as farmers are choosing good-quality forage for cattle to produce high-quality animal products. For instance, according to the USDA, the annual chicken meat production in Saudi Arabia was around 1.13 million metric tons in 2022 as compared to 0.93 million metric tons in 2021. Hence, the market is projected to grow significantly in the country with the rising demand from the meat industry.

However, the major restraints for this market are a ban on forage production and ecological factors such as scarce water resources in the country. In 2019, the Saudi Arabian government announced a ban on the cultivation of green fodder (forages) and replaced it with imported sources. This is anticipated to increase the demand for imported high-protein alfalfa but will lead to a decrease in the area harvested for alfalfa. Moreover, locally produced compound feed has become more price-competitive, due to the strong incentives offered by the Saudi government to encourage compound feed production. The Saudi government offers interest-free loans and provides import subsidies for thirty-one feed ingredients, including yellow corn, soybean meal, and barley,

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to boost the expansion of feed processing facilities and help reduce the country's heavy reliance on huge forage imports including alfalfa. Hence, imported forage including alfalfa would be used only as an ingredient to produce compound feed, and not be offered for direct livestock feeding. Thus, the shift toward the compound feed is potentially limiting the growth of the alfalfa market in the country.

Saudi Arabia Alfalfa Market Trends

Rising Demand for Quality Hay for Livestock and Dairy Production

Livestock products remain the desired food for nutritional value and taste across major parts of Saudi Arabia. Saudi farmers heavily rely on imported alfalfa hay to increase meat and dairy production. According to the Food and Agriculture Organization Corporate Statistical (FAOSTAT), the country's livestock population has risen over the past few years. The number of poultry bird stocks was 210,360 heads in 2022, up from 206,748 in 2021. Additionally, the rising demand has witnessed a significant increase in meat production. In 2022, poultry meat led the production with 1,130,095.6 metric tons, up from 930,221.9 metric tons in 2021, followed by sheep and goat meat at 153,596 metric tons.

Furthermore, according to the Ministry of Environment, Water, and Agriculture (MEWA), the Kingdom's domestic production reached a 60% self-sufficiency level in 2020. There are plans to collaborate with the private sector to increase that level to more than 85 percent by 2030. The government has also been actively working to remove obstacles for producers to acquire and use the land for poultry production, provide loans for equipment purchases, and reform its subsidy system for feed, livestock, and poultry. This is anticipated to increase poultry production, eventually creating demand for alfalfa hay.

Furthermore, processed red meats are consumed by emigrant communities and the food service sector in Saudi Arabia. The growing demand for meat and its inclusive of products, such as processed burgers and sausages, are anticipated to have a remarkable penetration across the food service sector, prominently through the Quick service restaurant (QSR) segment.

Saudi Arabia's Ban on Forage Crop Cultivation Sparks Surge in Imports

Saudi Arabia's decision to phase out domestic forage production, aimed at conserving water resources, has spurred a surge in alfalfa hay imports. This policy shift underscores the nation's growing reliance on imported high-protein alfalfa hay to bolster its livestock and dairy industries. Quality hay is paramount for Saudi Arabia's livestock sector, especially in poultry and dairy production, influencing both nutritional value and taste. With the ban on cultivating green fodder, including alfalfa, the country has turned to imports to satisfy its livestock's nutritional demands.

The productivity of Almarai and other Saudi Arabian dairies relies on key dairy feeds, including high-quality alfalfa hay, corn silage, and miscellaneous forages. However, the continual depletion of aquifers in the Arabian Peninsula posed a huge challenge to the alfalfa hay manufacturers/providers, as the domestic production of alfalfa is constrained due to water limitations. The main reason for the significant reduction in the Kingdom's forage production is concern over the depletion of the country's groundwater.

Hence, Saudi Arabia's decision to phase out forage production will likely increase the demand for imported high-protein alfalfa hay shortly. For instance, the imports of alfalfa have increased significantly in recent years. According to the ITC Trade Map, in 2022, the total import value for alfalfa meals accounted for around USD 67.6 million, which increased from USD 56.4 million in 2020.

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