

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

Market Report | 2025-09-01 | 80 pages | Mordor Intelligence

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Report description:

Saudi Arabia Agriculture Market Analysis

The Saudi Arabian Agriculture Market size is estimated at USD 15.20 billion in 2025 and is anticipated to reach USD 20.30 billion by 2030, at a CAGR of 6% during the forecast period. This trajectory reflects how Vision 2030 channels capital toward water-smart farming systems, controlled-environment agriculture (CEA), and desalination-linked irrigation. The rapid adoption of precision irrigation, greenhouse clusters, and data-driven farm management has begun to offset the structural constraints of extreme aridity. Consolidation continues as state-backed entities acquire global grain and input assets, ensuring supply security and stabilizing domestic food prices. The market's expansion occurs against the backdrop of ambitious self-sufficiency targets, where Saudi Arabia achieved notable milestones in 2024, including 76% self-sufficiency in tomatoes, 66% in grapes, and 87% in potatoes.

Saudi Arabia Agriculture Market Trends and Insights

Government Vision-2030 Subsidies and Grants

Vision 2030's agricultural financing programs are reshaping capital allocation patterns across the Kingdom's farming sector through unprecedented government support mechanisms. The Agricultural Development Fund provides up to 75% financing for greenhouse projects and modern irrigation systems, with tax holidays extending up to 10 years for qualifying agritech investments. This financial backing has catalyzed a surge in controlled-environment agriculture, with companies like Topian

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(NEOM subsidiary) opening a 4-hectare climate-resilient greenhouse facility in Oxagon during 2025, marking the Kingdom's largest single investment in precision horticulture to date. The subsidy structure particularly favors water-efficient technologies, creating market incentives that align private sector returns with national water conservation objectives.

Food-Security Imperative Amid Import Dependence

Saudi Arabia's strategic push to reduce food import dependency has intensified following supply chain disruptions during the COVID-19 pandemic and geopolitical tensions affecting global trade routes. The Kingdom currently imports approximately 90-95% of its edible oil requirements and significant portions of its fresh produce, creating vulnerability to external price shocks and supply disruptions. Government mandates now require major food companies to demonstrate domestic sourcing capabilities, with SALIC launching National Grain Supply Company (SABIL) in April 2025 to manage strategic grain storage and procurement operations across 14 silo branches with combined capacity exceeding 2.7 million metric tons. This policy framework is driving vertical integration strategies among agricultural companies, as domestic production capacity becomes a competitive differentiator in government contract bidding processes.

Extreme Aridity and Groundwater Depletion

Saudi Arabia's agricultural expansion faces fundamental water resource constraints as fossil aquifers decline at accelerating rates across major production regions. The Kingdom's non-renewable groundwater reserves are dropping by an average of 0.6 meters annually, with some agricultural areas experiencing depletion rates exceeding 1 meter per year. This hydrological challenge forces agricultural operators to invest in increasingly expensive water extraction equipment and deeper well drilling, driving up operational costs and threatening the economic viability of water-intensive crops. The situation is particularly acute in the Eastern Province and central regions, where traditional agricultural areas are experiencing well failures and declining water quality as aquifer levels drop below economically extractable depths.

Other drivers and restraints analyzed in the detailed report include:

Precision and Greenhouse Tech Adoption / National Water-Efficiency Programs / High Capex for Modern Farming Systems /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Vegetables maintain the largest market share at 38% in 2024, driven by controlled-environment agriculture that enables year-round production of tomatoes, cucumbers, and peppers despite extreme seasonal temperature variations. Growing vegetable output shortens import lines, trimming freight-driven carbon footprints in the Saudi Arabia agriculture market. Controlled environments stabilize supply in Ramadan and Hajj seasons when demand spikes.

The oilseeds and pulses segment emerges as the fastest-growing crop category with a 10.2% CAGR forecast through 2030, reflecting Saudi Arabia's strategic imperative to reduce import dependency for protein-rich crops and cooking oils that currently account for over 90% of domestic consumption. Government incentives specifically target oilseed cultivation through subsidized land allocation and water access programs, with the Ministry of Environment, Water, and Agriculture prioritizing sunflower and soybean production in northern provinces where climate conditions support these temperate crops.

The Saudi Arabia Agriculture Market Report is Segmented by Crop Type (Cereals and Grains, Fruits, and More). The Report Includes Production Analysis (Volume), Consumption Analysis (Value and Volume), Export Analysis (Value and Volume), Import Analysis (Value and Volume), and Price Trend Analysis. The Market Forecasts are Provided in Terms of Value (USD) and Volume

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(Metric Tons).

List of Companies Covered in this Report:

Market Overview / Market Drivers / Market Restraints / Value / Supply-Chain Analysis / Regulatory Landscape / Technological Outlook / PESTLE Analysis / List of Stakeholders /

Additional Benefits:

The market estimate (ME) sheet in Excel format /
3 months of analyst support /

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