

# MARKET RESEARCH REPORT

**Product:** 121410 - Lucerne (alfalfa) meal and pellets

**Country:** Saudi Arabia

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## SCOPE OF THE MARKET RESEARCH

Selected Product	Lucern (alfalfa) meal and pellets
Product HS Code	121410
Detailed Product Description	121410 - Lucerne (alfalfa) meal and pellets
Selected Country	Saudi Arabia
Period Analyzed	Jan 2019 - Apr 2025

## LIST OF SOURCES

- GTAIC calculations based on the UN Comtrade data
- GTAIC calculations based on data from the World Bank, the International Monetary Fund, the Heritage Foundation, the World Trade Organization, the UN Statistical Division, the Organization of Economic Cooperation and Development
- GTAIC calculations based upon the in-house developed methodology and data coming from all sources used in this report
- Google Gemini AI Model was used only for obtaining companies
- The Global Trade Alert (GTA)

# 1

## **PRODUCT OVERVIEW**

# SUMMARY: PRODUCT OVERVIEW

This section provides an overview of industrial applications, end uses, and key sectors for the selected product based on the HS code classification.

## P Product Description & Varieties

Lucerne (alfalfa) meal and pellets are processed forms of the lucerne plant, a highly nutritious forage crop. They are typically made by drying and grinding the whole plant into meal or compressing the meal into dense, cylindrical pellets. These products are valued for their high protein, fiber, and vitamin content, serving as concentrated feed supplements.

## I Industrial Applications

Used as a primary ingredient in the formulation and manufacturing of compound animal feeds for various livestock and poultry.

Processed into specialized feed products for horses, rabbits, and other small animals due to its balanced nutritional profile.

## E End Uses

Nutritional supplement and primary feed source for cattle, sheep, and goats to enhance growth and milk production.

High-protein and fiber component in poultry diets to support egg production and healthy development.

Essential roughage and protein source in horse feed, aiding digestion and providing sustained energy.

Complete feed for rabbits and other small herbivores, ensuring adequate fiber intake and nutrient supply.

Ingredient in pet food formulations, particularly for herbivorous pets.

## S Key Sectors

- |                                   |                     |
|-----------------------------------|---------------------|
| • Agriculture (Livestock Farming) | • Pet Food Industry |
| • Animal Feed Manufacturing       | • Equine Industry   |

# 2

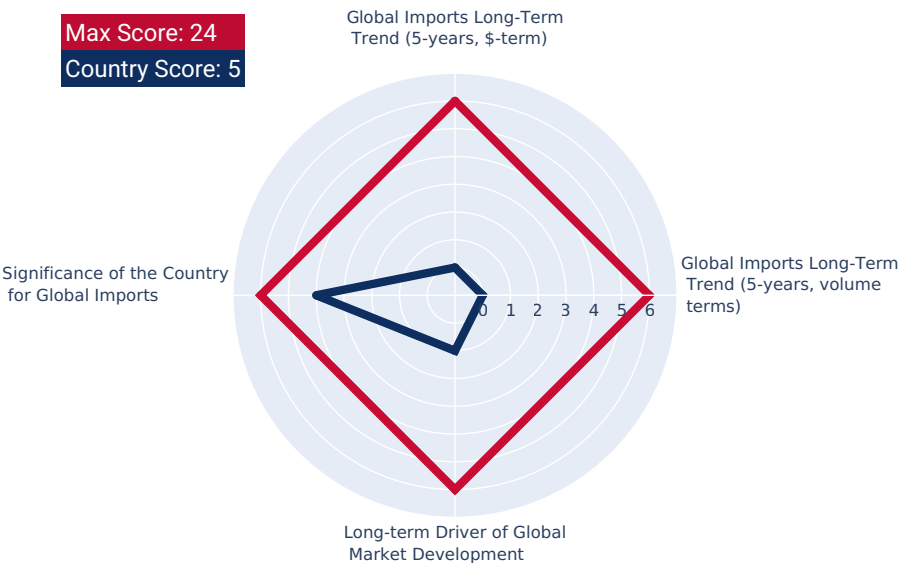
## EXECUTIVE SUMMARY



# SUMMARY: LONG-TERM TRENDS OF GLOBAL DEMAND FOR IMPORTS

This section provides a condensed overview of the global imports of the product over the last five calendar years. Its purpose is to facilitate the identification of whether there is an increase or decrease in global demand, the factors influencing this trend, and the primary countries-consumers of the product. A radar chart is utilized to illustrate the intensity of various parameters contributing to long-term demand trend. A higher score on this chart signifies a stronger global demand for a particular product.

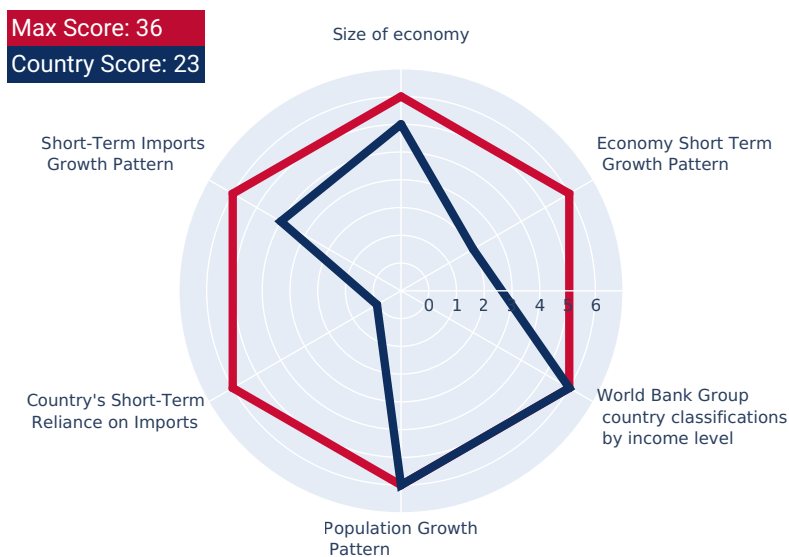
Global Imports Long-term Trends, US\$-terms	<p>Global market size for Lucern (alfalfa) meal and pellets was reported at US\$0.2B in 2024. The top-5 global importers of this good in 2024 include:</p> <ul style="list-style-type: none"><li>• USA (16.87% share and -10.5% YoY growth rate)</li><li>• Saudi Arabia (12.68% share and 81.8% YoY growth rate)</li><li>• Japan (11.7% share and -9.89% YoY growth rate)</li><li>• Germany (9.65% share and -5.89% YoY growth rate)</li><li>• Belgium (6.3% share and -13.5% YoY growth rate)</li></ul> <p>The long-term dynamics of the global market of Lucern (alfalfa) meal and pellets may be characterized as stagnating with US\$-terms CAGR exceeding -3.38% in 2020-2024.</p> <p>Market growth in 2024 outperformed the long-term growth rates of the global market in US\$-terms.</p>
Global Imports Long-term Trends, volumes	<p>In volume terms, the global market of Lucern (alfalfa) meal and pellets may be defined as stagnating with CAGR in the past five calendar years of -7.88%.</p> <p>Market growth in 2024 outperformed the long-term growth rates of the global market in volume terms.</p>
Long-term driver	<p>One of main drivers of the global market development was decline in demand accompanied by growth in prices.</p>
Significance of the Country for Global Imports	<p>Saudi Arabia accounts for about 12.68% of global imports of Lucern (alfalfa) meal and pellets in US\$-terms in 2024.</p>



# SUMMARY: STRENGTH OF THE DEMAND FOR IMPORTS IN THE SELECTED COUNTRY

This section provides a high-level overview of the selected country, aiming to gauge various aspects such as the country's economy size, its income level relative to other countries, recent trends in imported goods, and the extent of the global country's reliance on imports. By considering these indicators, one can evaluate the intensity of overall demand for imported goods within the country. A radar chart is employed to present multiple parameters, and the cumulative score of these parameters indicates the strength of the overall demand for imports. A higher total score on this chart reflects a greater level of overall demand strength. This total score serves as an estimate of the intensity of overall demand within the country.

Size of Economy	Saudi Arabia's GDP in 2024 was 1,237.53B current US\$. It was ranked #17 globally by the size of GDP and was classified as a Large economy.
Economy Short-term Pattern	Annual GDP growth rate in 2024 was 1.81%. The short-term growth pattern was characterized as Slowly growing economy.
The World Bank Group Country Classification by Income Level	Saudi Arabia's GDP per capita in 2024 was 35,057.23 current US\$. By income level, Saudi Arabia was classified by the World Bank Group as High income country.
Population Growth Pattern	Saudi Arabia's total population in 2024 was 35,300,280 people with the annual growth rate of 4.63%, which is typically observed in countries with a Quick growth in population pattern.
Short-term Imports Growth Pattern	Merchandise trade as a share of GDP added up to 43.42% in 2024. Total imports of goods and services was at 317.31B US\$ in 2024, with a growth rate of 3.31% compared to a year before. The short-term imports growth pattern in 2024 was backed by the stable growth rates of this indicator.
Country's Short-term Reliance on Imports	Saudi Arabia has Low level of reliance on imports in 2024.



# SUMMARY: SHORT-TERM TRENDS OF COUNTRY MARKET, US\$-TERMS

This section provides the short-term forecast for imports of the selected product to the subject country. It provides information on imports in US\$ terms over the last 12 and 6 months. The radar chart in this section evaluates various parameters, and a higher cumulative score on the chart indicates a stronger tracking of imports in US dollar terms.

LTM Country  
Market Trend, US\$-  
terms

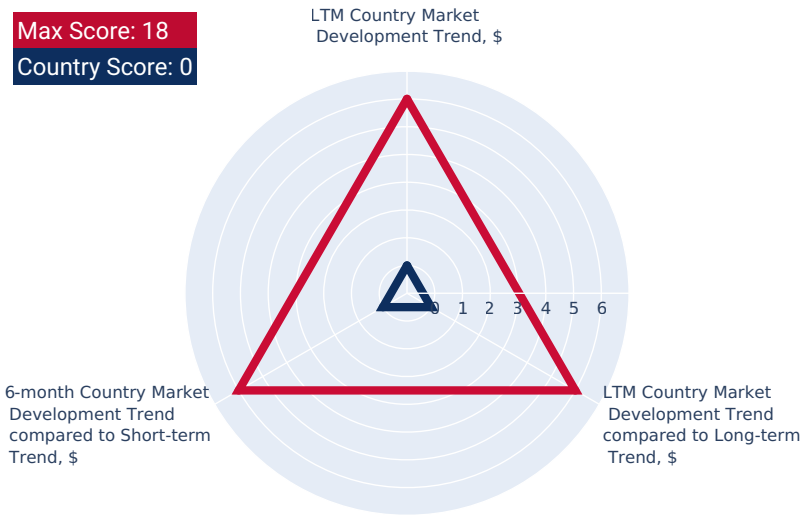
In LTM period (05.2024 - 04.2025) Saudi Arabia's imports of Lucern (alfalfa) meal and pellets was at the total amount of US\$19.11M. The dynamics of the imports of Lucern (alfalfa) meal and pellets in Saudi Arabia in LTM period demonstrated a stagnating trend with growth rate of -6.26%YoY. To compare, a 5-year CAGR for 2020-2024 was -18.44%. With this trend preserved, the expected monthly growth of imports in the coming period may reach the level of -3.48% (-34.59% annualized).

LTM Country  
Market Trend  
compared to Long-  
term Trend, US\$-  
terms

The growth of Imports of Lucern (alfalfa) meal and pellets to Saudi Arabia in LTM outperformed the long-term market growth of this product.

6-months Country  
Market Trend  
compared to Short-  
term Trend

Imports of Lucern (alfalfa) meal and pellets for the most recent 6-month period (11.2024 - 04.2025) underperformed the level of Imports for the same period a year before (-81.56% YoY growth rate)



# SUMMARY: SHORT-TERM TRENDS OF COUNTRY MARKET, VOLUMES AND PROXY PRICES

This section offers an insight into the short-term decomposition of imports for the chosen product. It aims to uncover the factors influencing the development of imports in US\$ terms, and identify any unusual price fluctuations observed in the last 6 to 12 months. The radar chart in this section assesses multiple parameters, and a higher cumulative score on the chart indicates a more positive short-term outlook for both demand and price within the country.

LTM Country Market  
Trend, volumes

Imports of Lucern (alfalfa) meal and pellets to Saudi Arabia in LTM period (05.2024 - 04.2025) was 86,823.78 tons. The dynamics of the market of Lucern (alfalfa) meal and pellets in Saudi Arabia in LTM period demonstrated a stagnating trend with growth rate of -1.12% in comparison to the preceding LTM period. To compare, a 5-year CAGR for 2020-2024 was -19.94%.

LTM Country Market  
Trend compared to Long-  
term Trend, volumes

The growth of imports of Lucern (alfalfa) meal and pellets to Saudi Arabia in LTM outperformed the long-term dynamics of the market of this product.

6-months Country Market  
Trend compared to Short-  
term Trend, volumes

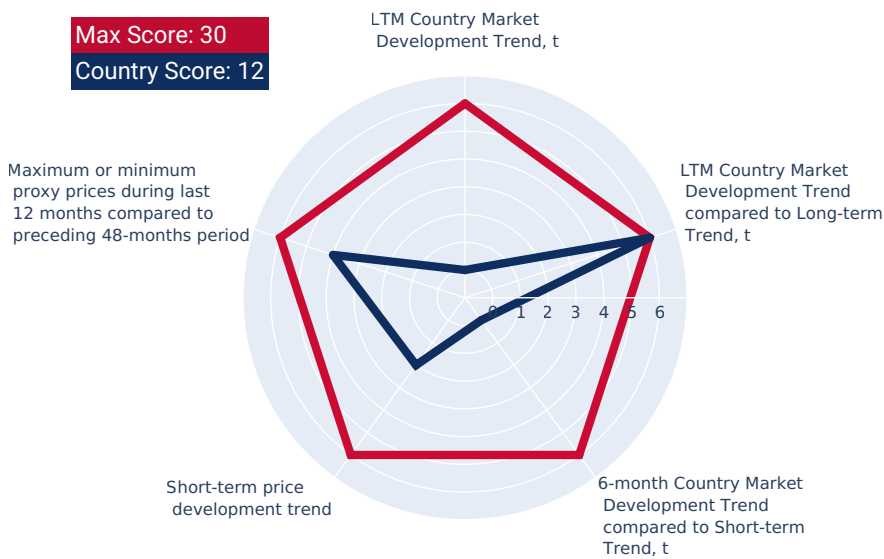
Imports in the most recent six months (11.2024 - 04.2025) fell behind the pattern of imports in the same period a year before (-78.6% growth rate).

Short-term Proxy Price  
Development Trend

The estimated average proxy price for imports of Lucern (alfalfa) meal and pellets to Saudi Arabia in LTM period (05.2024 - 04.2025) was 220.08 current US\$ per 1 ton. A general trend for the change in the proxy price was stable.

Max or Min proxy prices  
during LTM compared to  
preceding 48 months

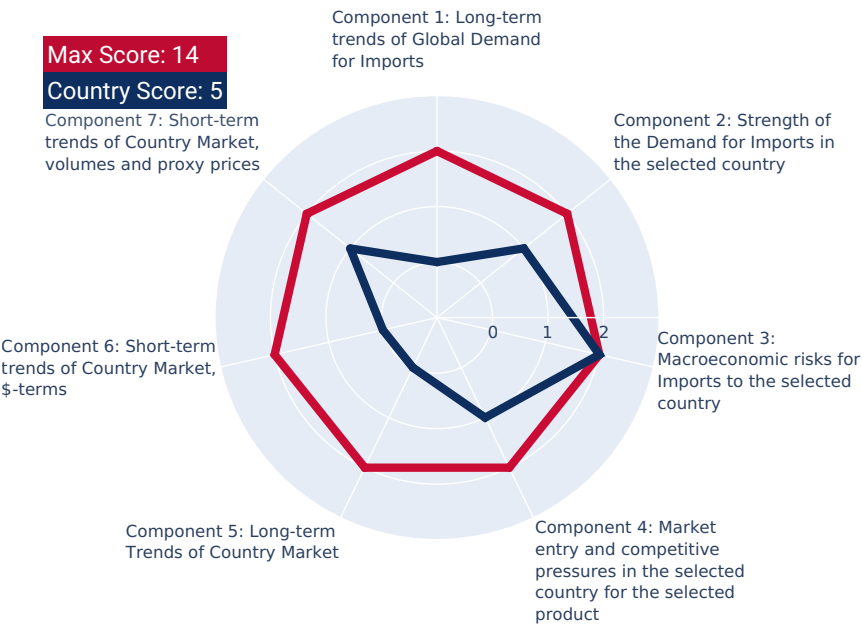
Changes in levels of monthly proxy prices of imports of Lucern (alfalfa) meal and pellets for the past 12 months consists of 1 record(s) of values higher than any of those in the preceding 48-month period, as well as no record(s) with values lower than any of those in the preceding 48-month period.



# SUMMARY: ASSESSMENT OF THE CHANCES FOR SUCCESSFUL EXPORTS OF THE PRODUCT TO THE COUNTRY MARKET

This section concludes by evaluating the level of attractiveness of the country's market for suppliers. Additionally, it offers an estimate of the potential scale of sales a supplier could achieve in the mid-term, represented in both US\$ and Ktons.

Aggregated Country Rank	The aggregated country's rank was 5 out of 14. Based on this estimation, the entry potential of this product market can be defined as signifying high risks associated with market entry.
Estimation of the Market Volume that May be Captured by a New Supplier in Mid-Term	<p>A high-level estimation of a share of imports of Lucern (alfalfa) meal and pellets to Saudi Arabia that may be captured by a new supplier or by existing market player in the upcoming short-term period of 6-12 months, includes two major components:</p> <ul style="list-style-type: none"><li>• <b>Component 1: Potential imports volume supported by Market Growth.</b> This is a market volume that can be captured by supplier as an effect of the trend related to market growth. This component is estimated at 0K US\$ monthly.</li><li>• <b>Component 2: Expansion of imports due to Competitive Advantages of supplier.</b> This is a market volume that can be captured by supplier with strong competitive advantages, whether price wise or another, more specific and sustainable competitive advantages. This component is estimated at 46.31K US\$ monthly.</li></ul> <p>In this way, based on recent imports dynamics and high-level analysis of the competition landscape, imports of Lucern (alfalfa) meal and pellets to Saudi Arabia may be expanded up to 46.31K US\$ monthly, which may be captured by suppliers in the short-term. This estimation holds possible should any significant competitive advantages are gained.</p>

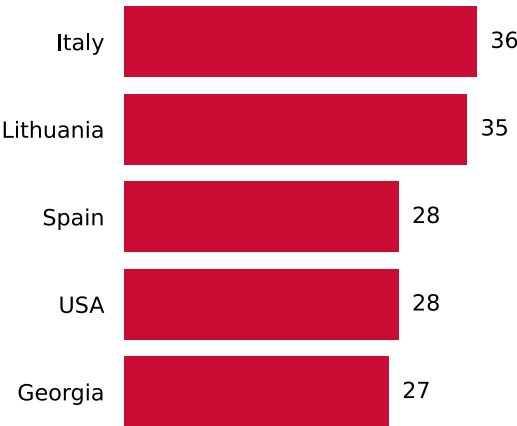


# SUMMARY: COMPETITION

This section provides an overview of countries-suppliers, or countries-competitors, of the selected product to the chosen country. It encompasses factors such as price competitiveness, market share, and any changes of both factors.

Competitor nations in the product market in Saudi Arabia	<p>In US\$ terms, the largest supplying countries of Lucern (alfalfa) meal and pellets to Saudi Arabia in LTM (05.2024 - 04.2025) were:</p> <ol style="list-style-type: none"><li>1. Spain (16.75 M US\$, or 87.68% share in total imports);</li><li>2. Italy (2.25 M US\$, or 11.76% share in total imports);</li><li>3. Lithuania (0.07 M US\$, or 0.37% share in total imports);</li><li>4. Egypt (0.04 M US\$, or 0.19% share in total imports);</li><li>5. USA (0.0 M US\$, or 0.0% share in total imports);</li></ol> <p>Countries who increased their imports the most (top-5 contributors to total growth in imports in US \$ terms) during the LTM period (05.2024 - 04.2025) were:</p> <ol style="list-style-type: none"><li>1. Italy (1.63 M US\$ contribution to growth of imports in LTM);</li><li>2. Lithuania (0.07 M US\$ contribution to growth of imports in LTM);</li><li>3. Georgia (0.0 M US\$ contribution to growth of imports in LTM);</li><li>4. Egypt (-0.0 M US\$ contribution to growth of imports in LTM);</li><li>5. USA (-0.01 M US\$ contribution to growth of imports in LTM);</li></ol> <p>Countries whose price level of imports may have been a significant factor of the growth of supply (out of Top-10 contributors to growth of total imports):</p> <ol style="list-style-type: none"><li>1. Spain (219 US\$ per ton, 87.68% in total imports, and -15.07% growth in LTM);</li><li>2. USA (121 US\$ per ton, 0.0% in total imports, and -87.94% growth in LTM);</li><li>3. Lithuania (155 US\$ per ton, 0.37% in total imports, and 0.0% growth in LTM);</li></ol> <p>Top-3 high-ranked competitors in the LTM period:</p> <ol style="list-style-type: none"><li>1. Italy (2.25 M US\$, or 11.76% share in total imports);</li><li>2. Lithuania (0.07 M US\$, or 0.37% share in total imports);</li><li>3. Spain (16.75 M US\$, or 87.68% share in total imports);</li></ol>
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## Ranking of TOP-5 Countries - Competitors



The ranking is a cumulative value of 4 parameters, with the maximum possible score of 40 points. For more information on the methodology, refer to the "Methodology" section.

# SUMMARY: LIST OF COMPANIES – POTENTIAL SUPPLIERS OF THE PRODUCT FROM EACH TOP TRADE PARTNER

The following table presents a selection of companies originating from the main trade partner countries of the country analyzed. These firms are potential or actual suppliers to the market under consideration. The dataset includes company names, country of origin, official websites, and estimated size metrics with values. This information was prepared with the assistance of Google's Gemini AI model to provide additional micro-level insights, complementing structured trade data. It is intended to support market analysis and business decision-making by helping identify potential business partners or competitors within the supply chain.

Company Name	Country	Website	Size Metric	Size Value
Italiana Alfalfa S.p.A.	Italy	<a href="https://www.italianaalfalfa.it/">https://www.italianaalfalfa.it/</a>	Revenue	60,000,000\$
Gruppo Carli	Italy	<a href="https://www.gruppocarli.com/">https://www.gruppocarli.com/</a>	Turnover	150,000,000\$
Agricola Tre Valli Cooperativa	Italy	<a href="https://www.agricolatrevalli.it/">https://www.agricolatrevalli.it/</a>	Turnover	300,000,000\$
Alfalfa Italia S.r.l.	Italy	<a href="https://www.alfalfaitalia.it/">https://www.alfalfaitalia.it/</a>	Revenue	30,000,000\$
Foragri S.r.l.	Italy	<a href="https://www.foragri.it/">https://www.foragri.it/</a>	Revenue	25,000,000\$
Grupo AN	Spain	<a href="https://www.grupoan.com/">https://www.grupoan.com/</a>	Turnover	1,500,000,000\$
Alfalfa de Aragón S.A.	Spain	<a href="https://www.alfalfadearagon.com/">https://www.alfalfadearagon.com/</a>	Revenue	50,000,000\$
Dehytec S.A.	Spain	<a href="https://www.dehytec.com/">https://www.dehytec.com/</a>	Revenue	40,000,000\$
Forrajes y Proteínas S.A. (FOPROTE)	Spain	<a href="https://www.foprote.com/">https://www.foprote.com/</a>	Revenue	35,000,000\$
Agropecuaria del Pirineo S.C.L. (AGROPAL)	Spain	<a href="https://www.agropal.es/">https://www.agropal.es/</a>	Turnover	250,000,000\$



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## SUMMARY: LIST OF COMPANIES – POTENTIAL BUYERS / IMPORTERS IN THE COUNTRY ANALYZED

The following table presents a selection of companies originating from the country analyzed, which are potential or actual buyers or importers of the product analyzed in the market under consideration. The dataset includes company names, country of origin, official websites, and estimated size metrics with values. This information was prepared with the assistance of Google's Gemini AI model to provide additional micro-level insights, complementing structured trade data. It is intended to support market analysis and business decision-making by helping identify potential business partners or competitors within the supply chain.

Company Name	Country	Website	Size Metric	Size Value
Almarai Company	Saudi Arabia	<a href="https://www.almarai.com/">https://www.almarai.com/</a>	Revenue	4,800,000,000\$
National Agricultural Development Company (NADEC)	Saudi Arabia	<a href="https://www.nadec.com.sa/">https://www.nadec.com.sa/</a>	Revenue	750,000,000\$
Arabian Agricultural Services Company (ARASCO)	Saudi Arabia	<a href="https://www.arasco.com/">https://www.arasco.com/</a>	Revenue	1,000,000,000\$
Tamimi Group (Tamimi Agriculture)	Saudi Arabia	<a href="https://www.tamimigroup.com/agriculture/">https://www.tamimigroup.com/agriculture/</a>	Revenue	5,000,000,000\$
Saudi Dairy and Foodstuff Company (SADAFCO)	Saudi Arabia	<a href="https://www.sadafco.com/">https://www.sadafco.com/</a>	Revenue	600,000,000\$
Al-Safi Danone	Saudi Arabia	<a href="https://www.alsafidanone.com/">https://www.alsafidanone.com/</a>	Revenue	800,000,000\$
Al Watania for Industries (WFI) - Animal Feed Division	Saudi Arabia	<a href="https://www.wfi.com.sa/en/sectors/animal-feed/">https://www.wfi.com.sa/en/sectors/animal-feed/</a>	Revenue	1,500,000,000\$
Saudi Livestock Transport & Trading Co. (ALBAHRI)	Saudi Arabia	<a href="https://www.albahri.com.sa/">https://www.albahri.com.sa/</a>	Revenue	200,000,000\$
Al-Marai Poultry (part of Almarai Company)	Saudi Arabia	<a href="https://www.almarai.com/en/our-businesses/poultry/">https://www.almarai.com/en/our-businesses/poultry/</a>	Revenue	4,800,000,000\$
Al-Rajhi International for Investment (RAII)	Saudi Arabia	<a href="https://www.raii.com.sa/">https://www.raii.com.sa/</a>	Revenue	1,000,000,000\$
Saudi Grains Organization (SAGO)	Saudi Arabia	<a href="https://www.sago.gov.sa/en">https://www.sago.gov.sa/en</a>	Revenue	5,000,000,000\$
Al-Kabeer Group (Al-Kabeer Farms)	Saudi Arabia	<a href="https://www.alkabeer.com/">https://www.alkabeer.com/</a>	Revenue	700,000,000\$
Saudi Fisheries Company (Al-Safwa)	Saudi Arabia	<a href="https://www.saudifisheries.com.sa/">https://www.saudifisheries.com.sa/</a>	Revenue	100,000,000\$
Al-Faisaliah Group (Al-Faisaliah Agricultural & Dairy Co.)	Saudi Arabia	<a href="https://www.alfaisaliah.com/en/sectors/food-beverages/">https://www.alfaisaliah.com/en/sectors/food-beverages/</a>	Revenue	2,000,000,000\$
Saudi Arabian Livestock Company (SALIC)	Saudi Arabia	<a href="https://salic.com/en/">https://salic.com/en/</a>	Revenue	1,000,000,000\$



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Company Name	Country	Website	Size Metric	Size Value
Al-Jouf Agricultural Development Company	Saudi Arabia	<a href="https://www.aljouf.com.sa/">https://www.aljouf.com.sa/</a>	Revenue	150,000,000\$
Tabuk Agricultural Development Company (TADCO)	Saudi Arabia	<a href="https://www.tadco-agri.com/">https://www.tadco-agri.com/</a>	Revenue	120,000,000\$
Al-Rashed Food Co.	Saudi Arabia	<a href="https://www.alrashedfood.com/">https://www.alrashedfood.com/</a>	Revenue	800,000,000\$
Saudi Feed Manufacturing Company (SFMC)	Saudi Arabia	<a href="http://sfmc.com.sa/">http://sfmc.com.sa/</a>	Revenue	150,000,000\$
Al-Ghurair Foods (Saudi Arabia)	Saudi Arabia	<a href="https://www.alghurairfoods.com/en/our-businesses/animal-feed/">https://www.alghurairfoods.com/en/our-businesses/animal-feed/</a>	Revenue	1,000,000,000\$
Arabian Farms Development Company	Saudi Arabia	<a href="http://arabianfarms.com.sa/">http://arabianfarms.com.sa/</a>	Revenue	300,000,000\$
Saudi Organic Food Company (SOFC)	Saudi Arabia	<a href="https://www.sofc.com.sa/">https://www.sofc.com.sa/</a>	Revenue	50,000,000\$
Al-Khorayef Group (Agricultural Division)	Saudi Arabia	<a href="https://www.alkhorayef.com/en/sectors/agriculture/">https://www.alkhorayef.com/en/sectors/agriculture/</a>	Revenue	1,000,000,000\$
Saudi Agricultural and Livestock Investment Company (SALIC - Domestic Operations)	Saudi Arabia	<a href="https://salic.com/en/">https://salic.com/en/</a>	Revenue	1,000,000,000\$



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# 3

## GLOBAL MARKET TRENDS

## GLOBAL MARKET: SUMMARY

Global Market Size (2024), in US\$ terms	US\$ 0.2 B
US\$-terms CAGR (5 previous years 2020-2024)	-3.38 %
Global Market Size (2024), in tons	644.73 Ktons
Volume-terms CAGR (5 previous years 2020-2024)	-7.88 %
Proxy prices CAGR (5 previous years 2020-2024)	4.89 %

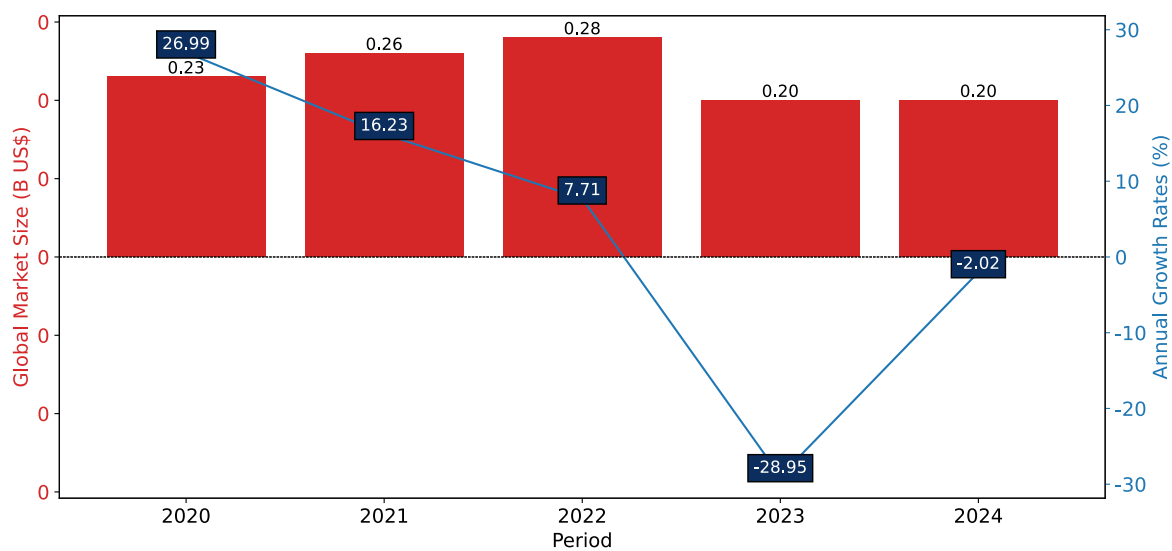
# GLOBAL MARKET: LONG-TERM TRENDS

This section describes the development over the past five years, focusing on global imports of the chosen product in US\$ terms, aggregating data from all countries. It presents information in absolute values, percentage growth rates, long-term Compound Annual Growth Rate (CAGR), and delves into the economic factors contributing to global imports.

Key points:

- i. The global market size of Lucern (alfalfa) meal and pellets was reported at US\$0.2B in 2024.
- ii. The long-term dynamics of the global market of Lucern (alfalfa) meal and pellets may be characterized as stagnating with US\$-terms CAGR exceeding -3.38%.
- iii. One of the main drivers of the global market development was decline in demand accompanied by growth in prices.
- iv. Market growth in 2024 outperformed the long-term growth rates of the global market in US\$-terms.

Figure 1. Global Market Size (B US\$, left axes), Annual Growth Rates (% , right axis)



- a. The global market size of Lucern (alfalfa) meal and pellets was estimated to be US\$0.2B in 2024, compared to US\$0.2B the year before, with an annual growth rate of -2.02%
- b. Since the past five years CAGR exceeded -3.38%, the global market may be defined as stagnating.
- c. One of the main drivers of the long-term development of the global market in the US\$ terms may be defined as decline in demand accompanied by growth in prices.
- d. The best-performing calendar year was 2020 with the largest growth rate in the US\$-terms. One of the possible reasons was growth in demand accompanied by declining prices.
- e. The worst-performing calendar year was 2023 with the smallest growth rate in the US\$-terms. One of the possible reasons was biggest drop in import volumes with slow average price growth.

The following countries were not included in the calculation of the size of the global market over the last six years due to irregular provision of annual import statistics to the UN Comtrade Database (Top 10 countries with irregular data provision): United Arab Emirates, Qatar, Jordan, Lesotho, Asia, not elsewhere specified, Kuwait, Oman, Morocco, Tunisia, Botswana.

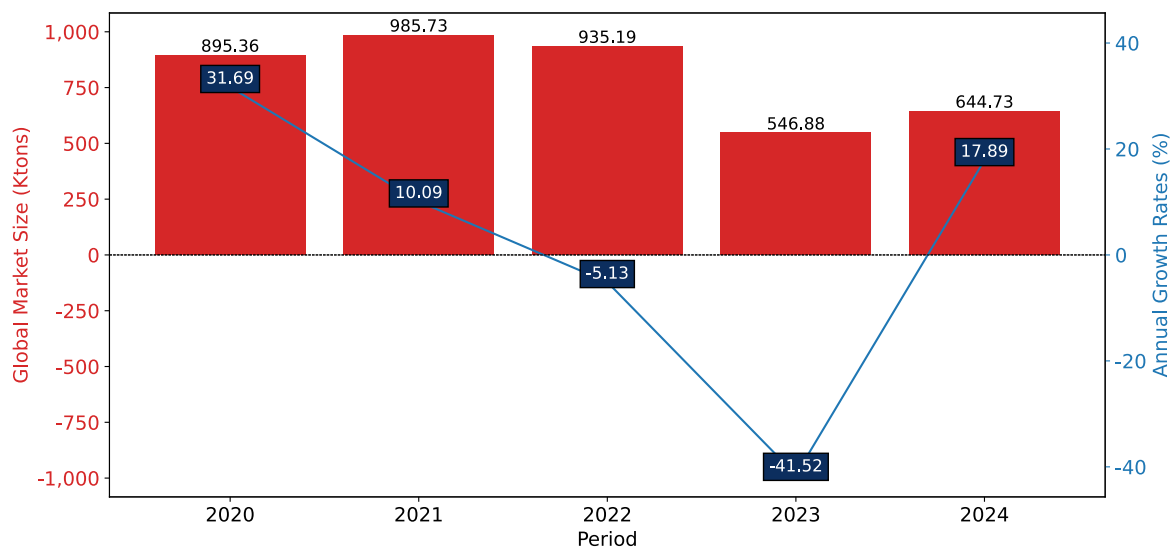
# GLOBAL MARKET: LONG-TERM TRENDS

This section provides an overview of the global imports of the chosen product in volume terms, aggregating data from imports across all countries. It presents information in absolute values, percentage growth rates, and the long-term Compound Annual Growth Rate (CAGR) to supplement the analysis.

Key points:

- i. In volume terms, global market of Lucern (alfalfa) meal and pellets may be defined as stagnating with CAGR in the past five years of -7.88%.
- ii. Market growth in 2024 outperformed the long-term growth rates of the global market in volume terms.

Figure 2. Global Market Size (Ktons, left axis), Annual Growth Rates (% ,right axis)



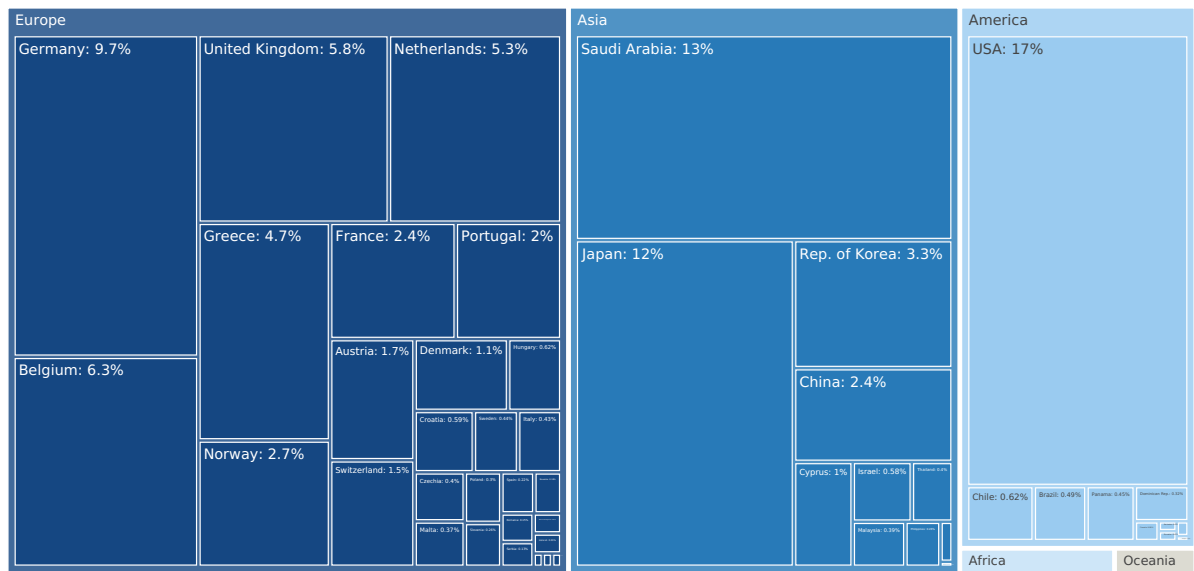
- a. Global market size for Lucern (alfalfa) meal and pellets reached 644.73 Ktons in 2024. This was approx. 17.89% change in comparison to the previous year (546.88 Ktons in 2023).
- b. The growth of the global market in volume terms in 2024 outperformed the long-term global market growth of the selected product.

The following countries were not included in the calculation of the size of the global market over the last six years due to irregular provision of annual import statistics to the UN Comtrade Database (Top 10 countries with irregular data provision): United Arab Emirates, Qatar, Jordan, Lesotho, Asia, not elsewhere specified, Kuwait, Oman, Morocco, Tunisia, Botswana.

# MARKETS CONTRIBUTING TO GLOBAL DEMAND

This section describes the global structure of imports for the chosen product. It utilizes a tree-map diagram, which offers a user-friendly visual representation covering all major importers.

Figure 3. Country-specific Global Imports in 2024, US\$-terms



Top-5 global importers of Lucern (alfalfa) meal and pellets in 2024 include:

- 1. USA (16.87% share and -10.5% YoY growth rate of imports);
- 2. Saudi Arabia (12.68% share and 81.8% YoY growth rate of imports);
- 3. Japan (11.7% share and -9.89% YoY growth rate of imports);
- 4. Germany (9.65% share and -5.89% YoY growth rate of imports);
- 5. Belgium (6.3% share and -13.5% YoY growth rate of imports).

Saudi Arabia accounts for about 12.68% of global imports of Lucern (alfalfa) meal and pellets.

# 4

## **COUNTRY** **ECONOMIC** **OUTLOOK**

## COUNTRY ECONOMIC OUTLOOK - 1

This section provides a list of macroeconomic indicators related to the chosen country . It may be important for exporters while looking for an opportunity to sell to this country. Find information and data trends about the country's economy, including the GDP growth, change in income, change in exports/imports, price inflation prospects. Besides, the section includes indicators of macroeconomic risks, stability of local currency, ability of the country to repay debts.

GDP (current US\$) (2024), B US\$	1,237.53
Rank of the Country in the World by the size of GDP (current US\$) (2024)	17
Size of the Economy	Large economy
Annual GDP growth rate, % (2024)	1.81
Economy Short-Term Growth Pattern	Slowly growing economy
GDP per capita (current US\$) (2024)	35,057.23
World Bank Group country classifications by income level	High income
Inflation, (CPI, annual %) (2024)	1.69
Short-Term Inflation Profile	Low level of inflation
Long-Term Inflation Index, (CPI, 2010=100), % (2024)	134.60
Long-Term Inflation Environment	Very low inflationary environment
Short-Term Monetary Policy (2024)	Impossible to define due to lack of data
Population, Total (2024)	35,300,280
Population Growth Rate (2024), % annual	4.63
Population Growth Pattern	Quick growth in population



## COUNTRY ECONOMIC OUTLOOK - 2

This section provides a list of macroeconomic indicators related to the chosen country. This may be important for exporters while looking for an opportunity to sell to this country. Find information and data trends about the country's economy, including the GDP growth, change in income, change in exports/imports operations, price inflation prospects. Besides, the section includes indicators of macroeconomic risks, stability of local currency, ability to repay debts.

GDP (current US\$) (2024), B US\$	1,237.53
Rank of the Country in the World by the size of GDP (current US\$) (2024)	17
Size of the Economy	Large economy
Annual GDP growth rate, % (2024)	1.81
Economy Short-Term Growth Pattern	Slowly growing economy
GDP per capita (current US\$) (2024)	35,057.23
World Bank Group country classifications by income level	High income
Inflation, (CPI, annual %) (2024)	1.69
Short-Term Inflation Profile	Low level of inflation
Long-Term Inflation Index, (CPI, 2010=100), % (2024)	134.60
Long-Term Inflation Environment	Very low inflationary environment
Short-Term Monetary Policy (2024)	Impossible to define due to lack of data
Population, Total (2024)	35,300,280
Population Growth Rate (2024), % annual	4.63
Population Growth Pattern	Quick growth in population

## COUNTRY ECONOMIC OUTLOOK - COMPETITION

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This section provides an overview of the competitive environment and trade protection measures within the selected country. It includes detailed information on import tariffs, pricing levels for specific goods, and the competitive advantages held by local producers.

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A competitive landscape of Lucern (alfalfa) meal and pellets formed by local producers in Saudi Arabia in 2022 is likely to be risk-free with a low level of local competition. The potentiality of local businesses to produce similar competitive products is somewhat Low. However, this doesn't account for the competition coming from other suppliers of this product to the market of Saudi Arabia.

In accordance with international classifications, the Lucern (alfalfa) meal and pellets belongs to the product category, which also contains another 38 products, which Saudi Arabia has no comparative advantage in producing. This note, however, needs further research before setting up export business to Saudi Arabia, since it also doesn't account for competition coming from other suppliers of the same products to the market of Saudi Arabia.

The level of proxy prices of 75% of imports of Lucern (alfalfa) meal and pellets to Saudi Arabia is within the range of 220.03 - 240.00 US\$/ton in 2024. The median value of proxy prices of imports of this commodity (current US\$/ton 236.50), however, is lower than the median value of proxy prices of 75% of the global imports of the same commodity in this period (current US\$/ton 377.68). This may signal that the product market in Saudi Arabia in terms of its profitability may have turned into low-margin for suppliers if compared to the international level.

Saudi Arabia charged on imports of Lucern (alfalfa) meal and pellets in n/a on average n/a%. The bound rate of ad valorem duty on this product, Saudi Arabia agreed not to exceed, is n/a%. Once a rate of duty is bound, it may not be raised without compensating the affected parties. At the same time, the rate of the tariff Saudi Arabia set for Lucern (alfalfa) meal and pellets was n/a the world average for this product in n/a n/a. This may signal about Saudi Arabia's market of this product being n/a protected from foreign competition.

This ad valorem duty rate Saudi Arabia set for Lucern (alfalfa) meal and pellets has been agreed to be a normal non-discriminatory tariff charged on imports of this product for all WTO member states. However, a country may apply the preferential rates resulting from a reciprocal trading agreement (e.g. free trade agreement or regional trading agreement) or a non-reciprocal preferential trading scheme like the Generalized System of Preference or preferential tariffs for least developed countries. As of 2024, Saudi Arabia applied the preferential rates for 0 countries on imports of Lucern (alfalfa) meal and pellets.

# 5

## **COUNTRY** **MARKET** **TRENDS**

## PRODUCT MARKET SNAPSHOT

This section provides data on imports of a specific good to a chosen country.

Country Market Size (2024), US\$	US\$ 25 M
Contribution of Lucern (alfalfa) meal and pellets to the Total Imports Growth in the previous 5 years	US\$ -31.48 M
Share of Lucern (alfalfa) meal and pellets in Total Imports (in value terms) in 2024.	0.01%
Change of the Share of Lucern (alfalfa) meal and pellets in Total Imports in 5 years	-73.77%
Country Market Size (2024), in tons	112.02 Ktons
CAGR (5 previous years 2020-2024), US\$-terms	-18.44%
CAGR (5 previous years 2020-2024), volume terms	-19.94%
Proxy price CAGR (5 previous years 2020-2024)	1.87%

# LONG-TERM COUNTRY TRENDS: IMPORTS VALUES

This section provides information on the imports of a specific product to a designated country over the past five years, presented in US\$ terms. It encompasses the growth rates of imports, the development of long-term import patterns, factors influencing import fluctuations, and an estimation of the country's reliance on imports.

Key points:

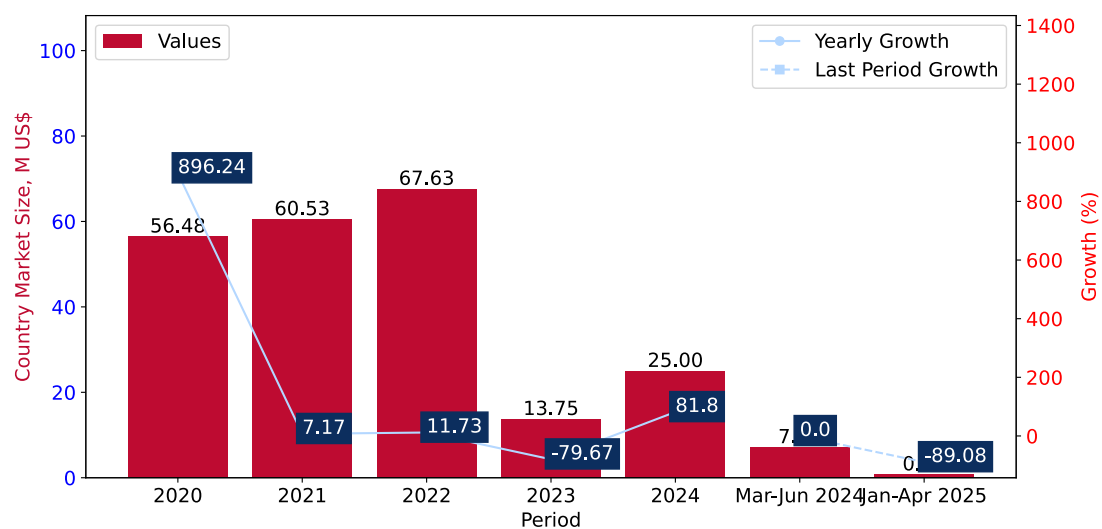
i. Long-term performance of Saudi Arabia's market of Lucern (alfalfa) meal and pellets may be defined as declining.

ii. Decline in demand accompanied by growth in prices may be a leading driver of the long-term growth of Saudi Arabia's market in US\$-terms.

iii. Expansion rates of imports of the product in 01.2025-04.2025 underperformed the level of growth of total imports of Saudi Arabia.

iv. The strength of the effect of imports of the product on the country's economy is generally low.

Figure 4. Saudi Arabia's Market Size of Lucern (alfalfa) meal and pellets in M US\$ (left axis) and Annual Growth Rates in % (right axis)



- a. Saudi Arabia's market size reached US\$25.0M in 2024, compared to US\$13.75M in 2023. Annual growth rate was 81.8%.
- b. Saudi Arabia's market size in 01.2025-04.2025 reached US\$0.78M, compared to US\$7.14M in the same period last year. The growth rate was -89.08%.
- c. Imports of the product contributed around 0.01% to the total imports of Saudi Arabia in 2024. That is, its effect on Saudi Arabia's economy is generally of a low strength. At the same time, the share of the product imports in the total Imports of Saudi Arabia remained stable.
- d. Since CAGR of imports of the product in US\$-terms for the past 5Y exceeded -18.44%, the product market may be defined as declining. Ultimately, the expansion rate of imports of Lucern (alfalfa) meal and pellets was underperforming compared to the level of growth of total imports of Saudi Arabia (13.97% of the change in CAGR of total imports of Saudi Arabia).
- e. It is highly likely, that decline in demand accompanied by growth in prices was a leading driver of the long-term growth of Saudi Arabia's market in US\$-terms.
- f. The best-performing calendar year with the highest growth rate of imports in the US\$-terms was 2020. It is highly likely that growth in demand accompanied by declining prices had a major effect.
- g. The worst-performing calendar year with the smallest growth rate of imports in the US\$-terms was 2023. It is highly likely that decline in demand accompanied by decline in prices had a major effect.

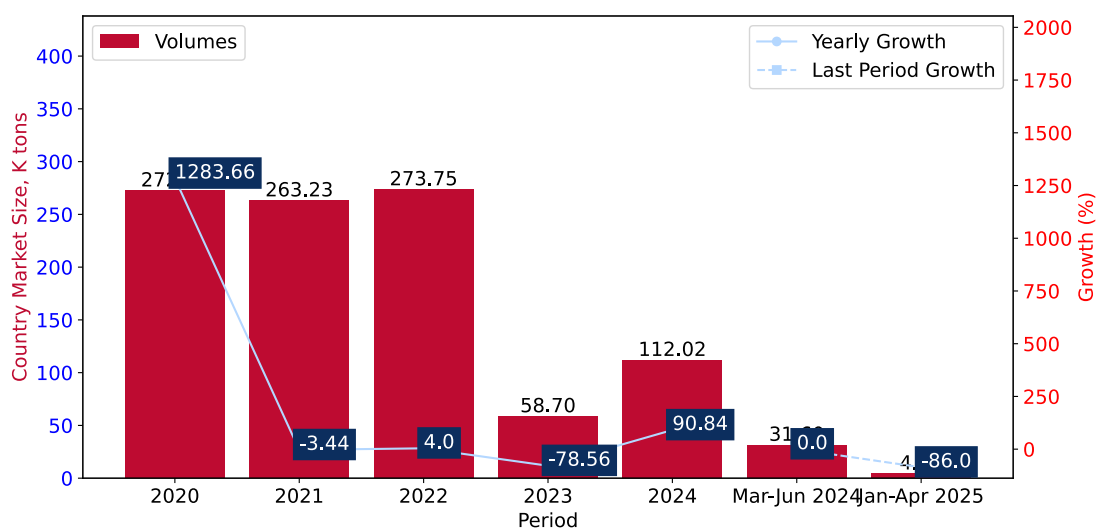
# LONG-TERM COUNTRY TRENDS: IMPORTS VOLUMES

This section presents information regarding the imports of a particular product to a selected country over the last five years. It includes details about physical volumes, import growth rates, and the long-term development trend in imports.

Key points:

- i. In volume terms, the market of Lucern (alfalfa) meal and pellets in Saudi Arabia was in a declining trend with CAGR of -19.94% for the past 5 years, and it reached 112.02 Ktons in 2024.
- ii. Expansion rates of the imports of Lucern (alfalfa) meal and pellets in Saudi Arabia in 01.2025-04.2025 underperformed the long-term level of growth of the Saudi Arabia's imports of this product in volume terms

Figure 5. Saudi Arabia's Market Size of Lucern (alfalfa) meal and pellets in K tons (left axis), Growth Rates in % (right axis)



- a. Saudi Arabia's market size of Lucern (alfalfa) meal and pellets reached 112.02 Ktons in 2024 in comparison to 58.7 Ktons in 2023. The annual growth rate was 90.84%.
- b. Saudi Arabia's market size of Lucern (alfalfa) meal and pellets in 01.2025-04.2025 reached 4.42 Ktons, in comparison to 31.6 Ktons in the same period last year. The growth rate equaled to approx. -86.0%.
- c. Expansion rates of the imports of Lucern (alfalfa) meal and pellets in Saudi Arabia in 01.2025-04.2025 underperformed the long-term level of growth of the country's imports of Lucern (alfalfa) meal and pellets in volume terms.

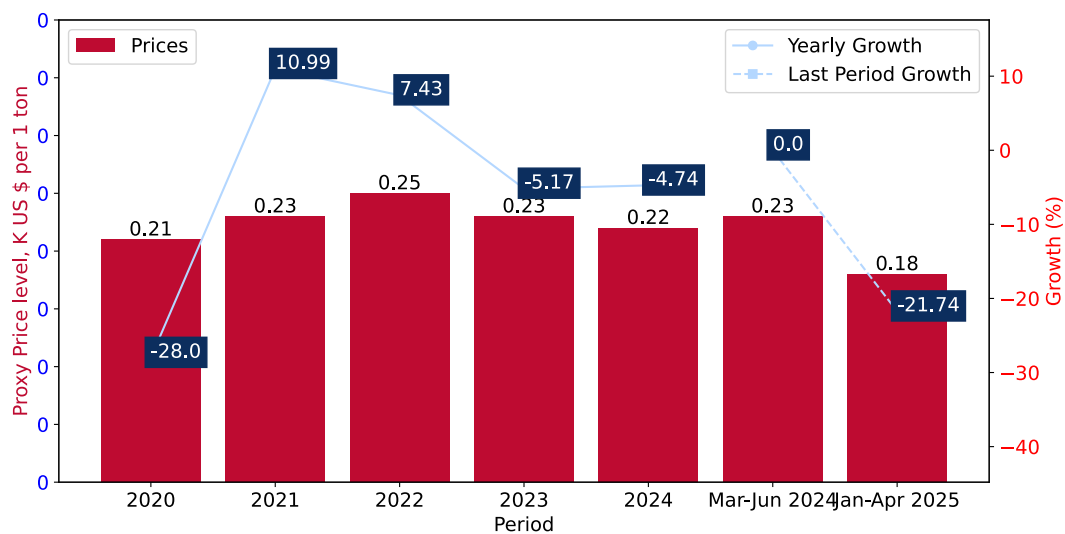
# LONG-TERM COUNTRY TRENDS: PROXY PRICES

This section provides details regarding the price fluctuations of a specific imported product over the past five years. It covers the assessment of average annual proxy prices, their changes, growth rates, and identification of any anomalies in price fluctuations.

Key points:

- i. Average annual level of proxy prices of Lucern (alfalfa) meal and pellets in Saudi Arabia was in a stable trend with CAGR of 1.87% for the past 5 years.
- ii. Expansion rates of average level of proxy prices on imports of Lucern (alfalfa) meal and pellets in Saudi Arabia in 01.2025-04.2025 underperformed the long-term level of proxy price growth.

Figure 6. Saudi Arabia's Proxy Price Level on Imports, K US\$ per 1 ton (left axis), Growth Rates in % (right axis)



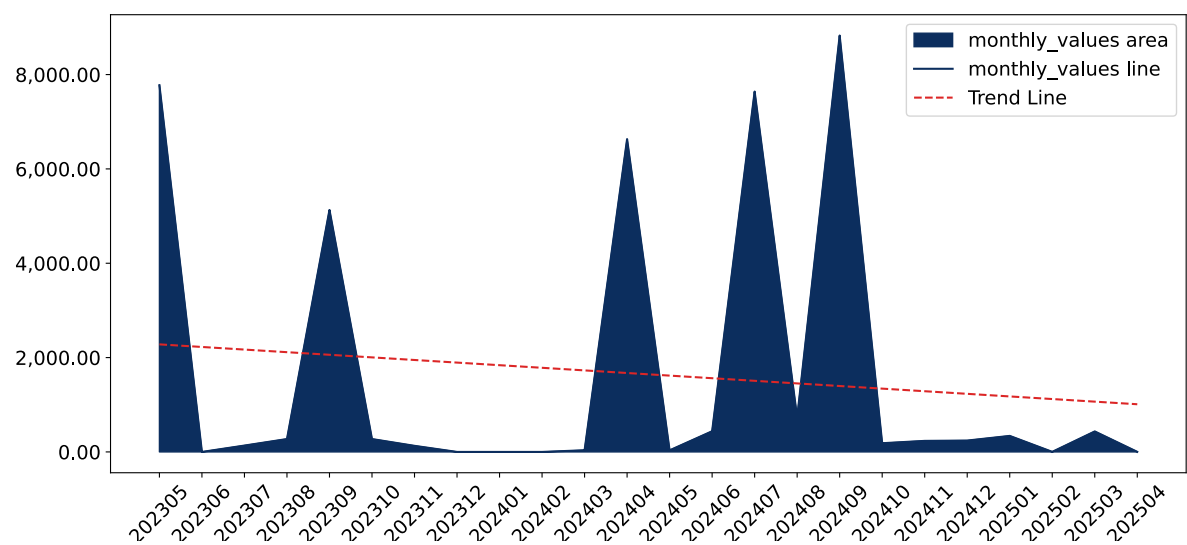
1. Average annual level of proxy prices of Lucern (alfalfa) meal and pellets has been stable at a CAGR of 1.87% in the previous 5 years.
2. In 2024, the average level of proxy prices on imports of Lucern (alfalfa) meal and pellets in Saudi Arabia reached 0.22 K US\$ per 1 ton in comparison to 0.23 K US\$ per 1 ton in 2023. The annual growth rate was -4.74%.
3. Further, the average level of proxy prices on imports of Lucern (alfalfa) meal and pellets in Saudi Arabia in 01.2025-04.2025 reached 0.18 K US\$ per 1 ton, in comparison to 0.23 K US\$ per 1 ton in the same period last year. The growth rate was approx. -21.74%.
4. In this way, the growth of average level of proxy prices on imports of Lucern (alfalfa) meal and pellets in Saudi Arabia in 01.2025-04.2025 was lower compared to the long-term dynamics of proxy prices.

# SHORT-TERM TRENDS: IMPORTS VALUES

This section offers comprehensive and up-to-date statistics concerning the imports of a specific product into a designated country over the past 24 months for which relevant statistics is published and available. It includes monthly import values in US\$, year-on-year changes, identification of any anomalies in imports, examination of factors driving short-term fluctuations. Besides, it provides a quantitative estimation of the short-term trend in imports to supplement the data.

Figure 7. Monthly Imports of Saudi Arabia, K current US\$

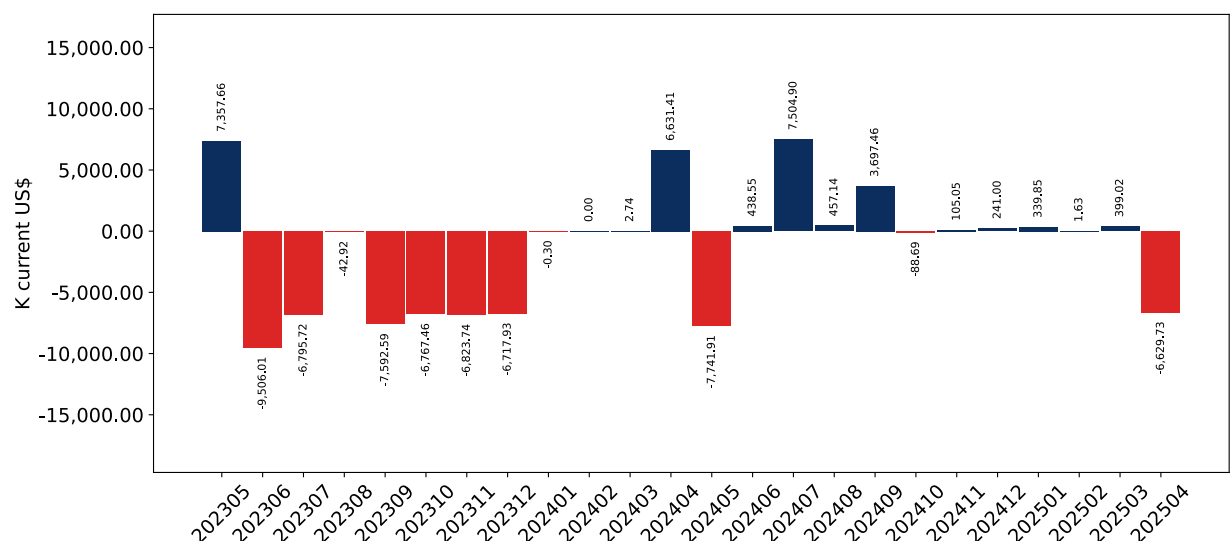
-3.48% -34.59%  
monthly annualized



Average monthly growth rates of Saudi Arabia’s imports were at a rate of -3.48%, the annualized expected growth rate can be estimated at -34.59%.

The dashed line is a linear trend for Imports. Values are not seasonally adjusted.

Figure 8. Y-o-Y Monthly Level Change of Imports of Saudi Arabia, K current US\$ (left axis)



Year-over-year monthly imports change depicts fluctuations of imports operations in Saudi Arabia. The more positive values are on chart, the more vigorous the country in importing of Lucern (alfalfa) meal and pellets. Negative values may be a signal of the market contraction.

Values in columns are not seasonally adjusted.



## SHORT-TERM TRENDS: IMPORTS VALUES

This section presents detailed and the most recent data on the imports of a specific commodity to a chosen country over the past 24 months for which relevant statistics is published and available. It encompasses monthly import figures in US dollars, year-on-year changes, anomalies in import patterns, factors driving short-term fluctuations, and includes a quantitative estimation of short-term import trends as additional information.

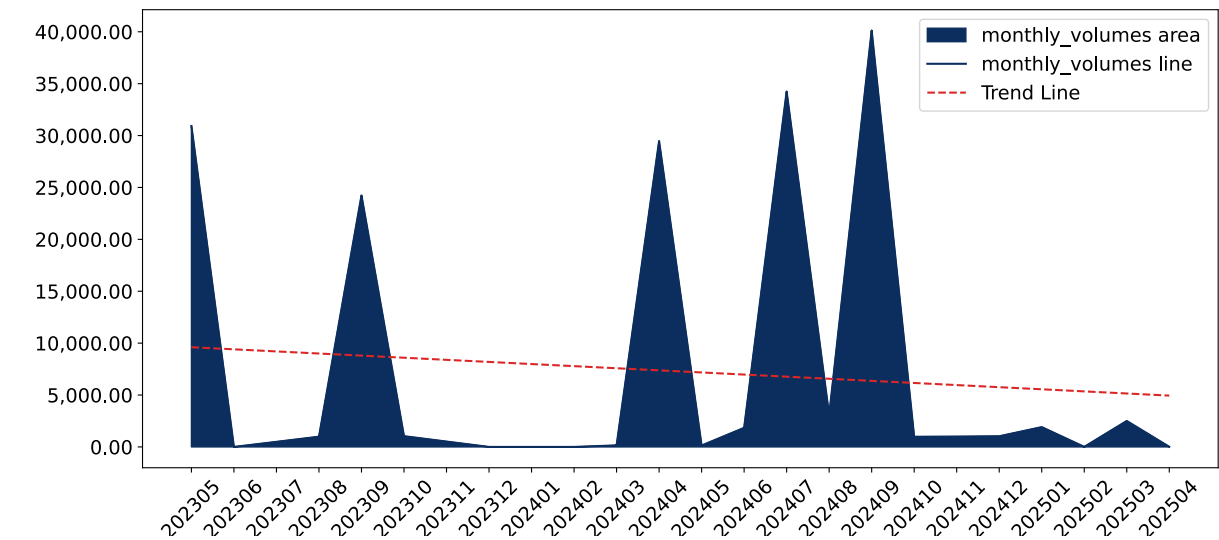
### Key points:

- i. The dynamics of the market of Lucern (alfalfa) meal and pellets in Saudi Arabia in LTM (05.2024 - 04.2025) period demonstrated a stagnating trend with growth rate of -6.26%. To compare, a 5-year CAGR for 2020-2024 was -18.44%.
  - ii. With this trend preserved, the expected monthly growth of imports in the coming period may reach the level of -3.48%, or -34.59% on annual basis.
  - iii. Data for monthly imports over the last 12 months contain no record(s) of higher and no record(s) of lower values compared to any value for the 48-months period before.
- 
- a. In LTM period (05.2024 - 04.2025) Saudi Arabia imported Lucern (alfalfa) meal and pellets at the total amount of US\$19.11M. This is -6.26% growth compared to the corresponding period a year before.
  - b. The growth of imports of Lucern (alfalfa) meal and pellets to Saudi Arabia in LTM outperformed the long-term imports growth of this product.
  - c. Imports of Lucern (alfalfa) meal and pellets to Saudi Arabia for the most recent 6-month period (11.2024 - 04.2025) underperformed the level of Imports for the same period a year before (-81.56% change).
  - d. A general trend for market dynamics in 05.2024 - 04.2025 is stagnating. The expected average monthly growth rate of imports of Saudi Arabia in current USD is -3.48% (or -34.59% on annual basis).
  - e. Monthly dynamics of imports in last 12 months included no record(s) that exceeded the highest/peak value of imports achieved in the preceding 48 months, and no record(s) that bypass the lowest value of imports in the same period in the past.

# SHORT-TERM TRENDS: IMPORTS VOLUMES

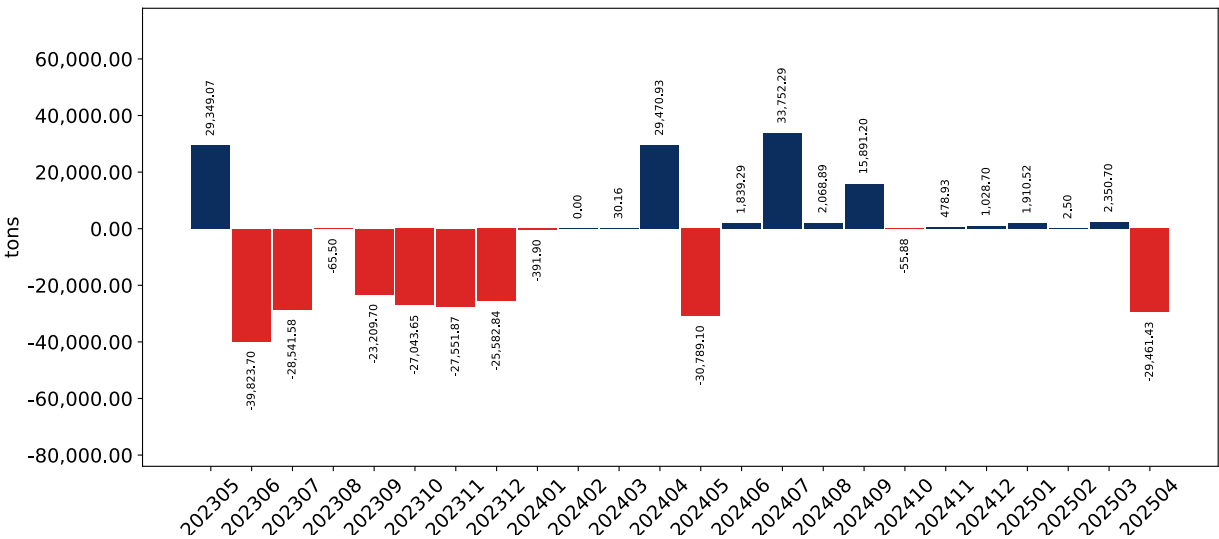
This section presents detailed and the most recent data on the imports of a specific commodity to a chosen country over the past 24 months for which relevant statistics is published and available. It encompasses monthly import figures in tons, year-on-year changes, anomalies in import patterns, factors driving short-term fluctuations, and includes a quantitative estimation of short-term import trends as additional information.

Figure 9. Monthly Imports of Saudi Arabia, tons -2.85% -29.28%  
monthly annualized



Monthly imports of Saudi Arabia changed at a rate of -2.85%, while the annualized growth rate for these 2 years was -29.28%. The dashed line is a linear trend for Imports. Volumes are not seasonally adjusted.

Figure 10. Y-o-Y Monthly Level Change of Imports of Saudi Arabia, tons



Year-over-year monthly imports change depicts fluctuations of imports operations in Saudi Arabia. The more positive values are on chart, the more vigorous the country in importing of Lucern (alfalfa) meal and pellets. Negative values may be a signal of market contraction.

Volumes in columns are in tons.

## SHORT-TERM TRENDS: IMPORTS VOLUMES

This section presents detailed and the most recent data on the imports of a specific commodity into a chosen country over the past 24 months for which relevant statistics is published and available. It encompasses monthly import figures in tons, year-on-year changes, anomalies in import patterns, factors driving short-term fluctuations, and includes a quantitative estimation of short-term import trends as additional information.

### Key points:

- i. The dynamics of the market of Lucern (alfalfa) meal and pellets in Saudi Arabia in LTM period demonstrated a stagnating trend with a growth rate of -1.12%. To compare, a 5-year CAGR for 2020-2024 was -19.94%.
  - ii. With this trend preserved, the expected monthly growth of imports in the coming period may reach the level of -2.85%, or -29.28% on annual basis.
  - iii. Data for monthly imports over the last 12 months contain no record(s) of higher and no record(s) of lower values compared to any value for the 48-months period before.
- 
- a. In LTM period (05.2024 - 04.2025) Saudi Arabia imported Lucern (alfalfa) meal and pellets at the total amount of 86,823.78 tons. This is -1.12% change compared to the corresponding period a year before.
  - b. The growth of imports of Lucern (alfalfa) meal and pellets to Saudi Arabia in value terms in LTM outperformed the long-term imports growth of this product.
  - c. Imports of Lucern (alfalfa) meal and pellets to Saudi Arabia for the most recent 6-month period (11.2024 - 04.2025) underperform the level of Imports for the same period a year before (-78.6% change).
  - d. A general trend for market dynamics in 05.2024 - 04.2025 is stagnating. The expected average monthly growth rate of imports of Lucern (alfalfa) meal and pellets to Saudi Arabia in tons is -2.85% (or -29.28% on annual basis).
  - e. Monthly dynamics of imports in last 12 months included no record(s) that exceeded the highest/peak value of imports achieved in the preceding 48 months, and no record(s) that bypass the lowest value of imports in the same period in the past.

# SHORT-TERM TRENDS: PROXY PRICES

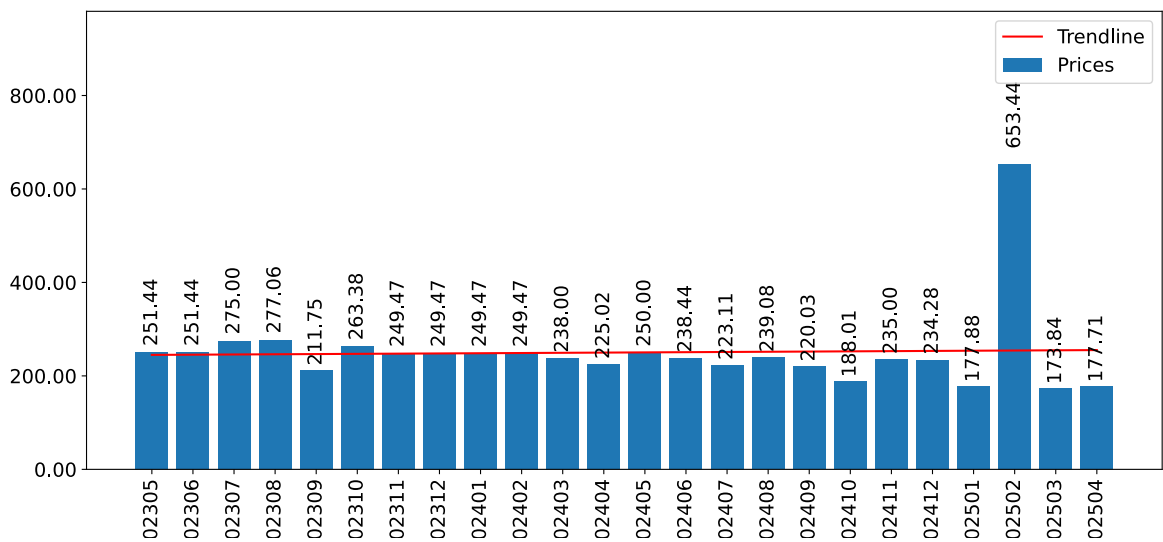
This section provides a quantitative assessment of short-term price fluctuations. It includes details on the monthly proxy price changes, an estimation of the short-term trend in proxy price levels, and identification of any anomalies in price dynamics.

Key points:

- i. The average level of proxy price on imports in LTM period (05.2024-04.2025) was 220.08 current US\$ per 1 ton, which is a -5.2% change compared to the same period a year before. A general trend for proxy price change was stable.
- ii. Decline in demand accompanied by growth in prices was a leading driver of the Country Market Short-term Development.
- iii. With this trend preserved, the expected monthly growth of the proxy price level in the coming period may reach the level of 0.18%, or 2.17% on annual basis.

Figure 11. Average Monthly Proxy Prices on Imports, current US\$/ton

0.18% 2.17%  
monthly annualized

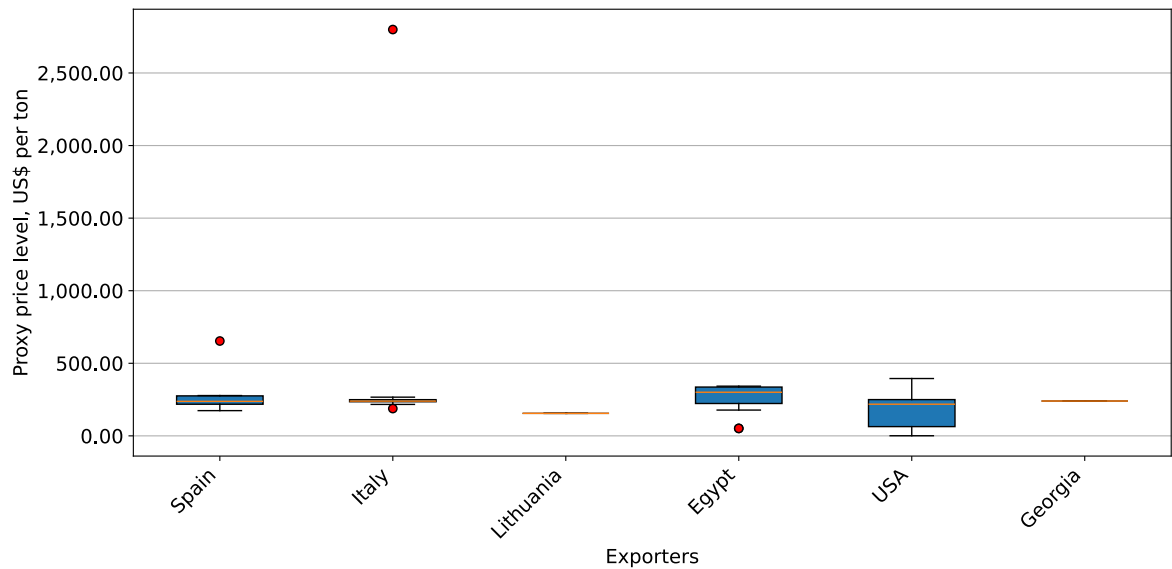


- a. The estimated average proxy price on imports of Lucern (alfalfa) meal and pellets to Saudi Arabia in LTM period (05.2024-04.2025) was 220.08 current US\$ per 1 ton.
- b. With a -5.2% change, a general trend for the proxy price level is stable.
- c. Changes in levels of monthly proxy prices on imports for the past 12 months consists of 1 record(s) with values exceeding the highest level of proxy prices for the preceding 48-months period, and no record(s) with values lower than the lowest value of proxy prices in the same period.
- d. It is highly likely, that decline in demand accompanied by growth in prices was a leading driver of the short-term fluctuations in the market.

# SHORT-TERM TRENDS: PROXY PRICES

This section provides comprehensive details on proxy price levels in a form of box plot. It facilitates the analysis and comparison of proxy prices of the selected good supplied by other countries.

Figure 12. LTM Average Monthly Proxy Prices by Largest Suppliers, Current US\$ / ton



The chart shows distribution of proxy prices on imports for the period of LTM (05.2024-04.2025) for Lucern (alfalfa) meal and pellets exported to Saudi Arabia by largest exporters. The box height shows the range of the middle 50% of levels of proxy price on imports formed in LTM. The higher the box, the wider the spread of proxy prices. The line within the box, a median level of the proxy price level on imports, marks the midpoint of per country data set: half the prices are greater than or equal to this value, and half are less. The upper and lower whiskers represent values of proxy prices outside the middle 50%, that is, the lower 25% and the upper 25% of the proxy price levels. The lowest proxy price level is at the end of the lower whisker, while the highest is at the end of the higher whisker. Red dots represent unusually high or low values (i.e., outliers), which are not included in the box plot.

# 6

## COUNTRY COMPETITION LANDSCAPE

## COMPETITION LANDSCAPE: TRADE PARTNERS, VALUES

This section provides an analysis of the trade partner distribution for the selected product imports to the chosen country, focusing on imports values. The countries listed in the table are ranked from the largest to the smallest trade partners, based on the imports values from the most recent available calendar year.

The five largest exporters of Lucern (alfalfa) meal and pellets to Saudi Arabia in 2024 were: Spain, Italy, Egypt, USA and Georgia.

Table 1. Country's Imports by Trade Partners, K current US\$

Partner	2019	2020	2021	2022	2023	2024	Jan 24 - Apr 24	Jan 25 - Apr 25
Spain	0.0	22,806.5	43,810.6	60,488.5	13,485.3	22,323.7	6,275.0	705.9
Italy	72.8	33,182.7	11,612.0	6,783.0	258.0	2,603.1	356.4	0.0
Egypt	882.8	410.8	3,287.5	6.2	0.0	69.5	35.7	1.7
USA	0.0	1.7	17.9	2.6	6.9	0.8	0.0	0.0
Georgia	0.0	0.0	0.0	0.0	0.0	0.5	0.0	0.0
Argentina	4,612.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Lithuania	0.0	0.0	0.0	0.0	0.0	0.0	0.0	70.3
Belgium	73.5	58.2	0.0	0.0	0.0	0.0	0.0	0.0
Azerbaijan	3.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0
New Zealand	0.0	19.6	0.0	0.0	0.0	0.0	0.0	0.0
South Africa	0.0	0.0	1,364.2	0.0	0.0	0.0	0.0	0.0
Romania	0.0	0.0	378.8	129.6	0.0	0.0	0.0	0.0
Ukraine	0.0	0.0	57.0	215.8	0.0	0.0	0.0	0.0
Türkiye	24.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0
<b>Total</b>	<b>5,669.2</b>	<b>56,479.3</b>	<b>60,527.9</b>	<b>67,625.7</b>	<b>13,750.2</b>	<b>24,997.5</b>	<b>6,667.1</b>	<b>777.9</b>

# COMPETITION LANDSCAPE: TRADE PARTNERS, VALUES

This section provides an analysis of the trade partner distribution for the selected product imports to the chosen country, focusing on imports values. The countries listed in the table are ranked from the largest to the smallest trade partners, based on the imports values from the most recent available calendar year.

Table 2. Country’s Imports by Trade Partners. Shares in total Imports Values of the Country.

Partner	2019	2020	2021	2022	2023	2024	Jan 24 - Apr 24	Jan 25 - Apr 25
Spain	0.0%	40.4%	72.4%	89.4%	98.1%	89.3%	94.1%	90.7%
Italy	1.3%	58.8%	19.2%	10.0%	1.9%	10.4%	5.3%	0.0%
Egypt	15.6%	0.7%	5.4%	0.0%	0.0%	0.3%	0.5%	0.2%
USA	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%
Georgia	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Argentina	81.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lithuania	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.0%
Belgium	1.3%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Azerbaijan	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
New Zealand	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
South Africa	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Romania	0.0%	0.0%	0.6%	0.2%	0.0%	0.0%	0.0%	0.0%
Ukraine	0.0%	0.0%	0.1%	0.3%	0.0%	0.0%	0.0%	0.0%
Türkiye	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Figure 13. Largest Trade Partners of Saudi Arabia in 2024, K US\$



The chart shows largest supplying countries and their shares in imports of to in in value terms (US\$). Different colors depict geographic regions.



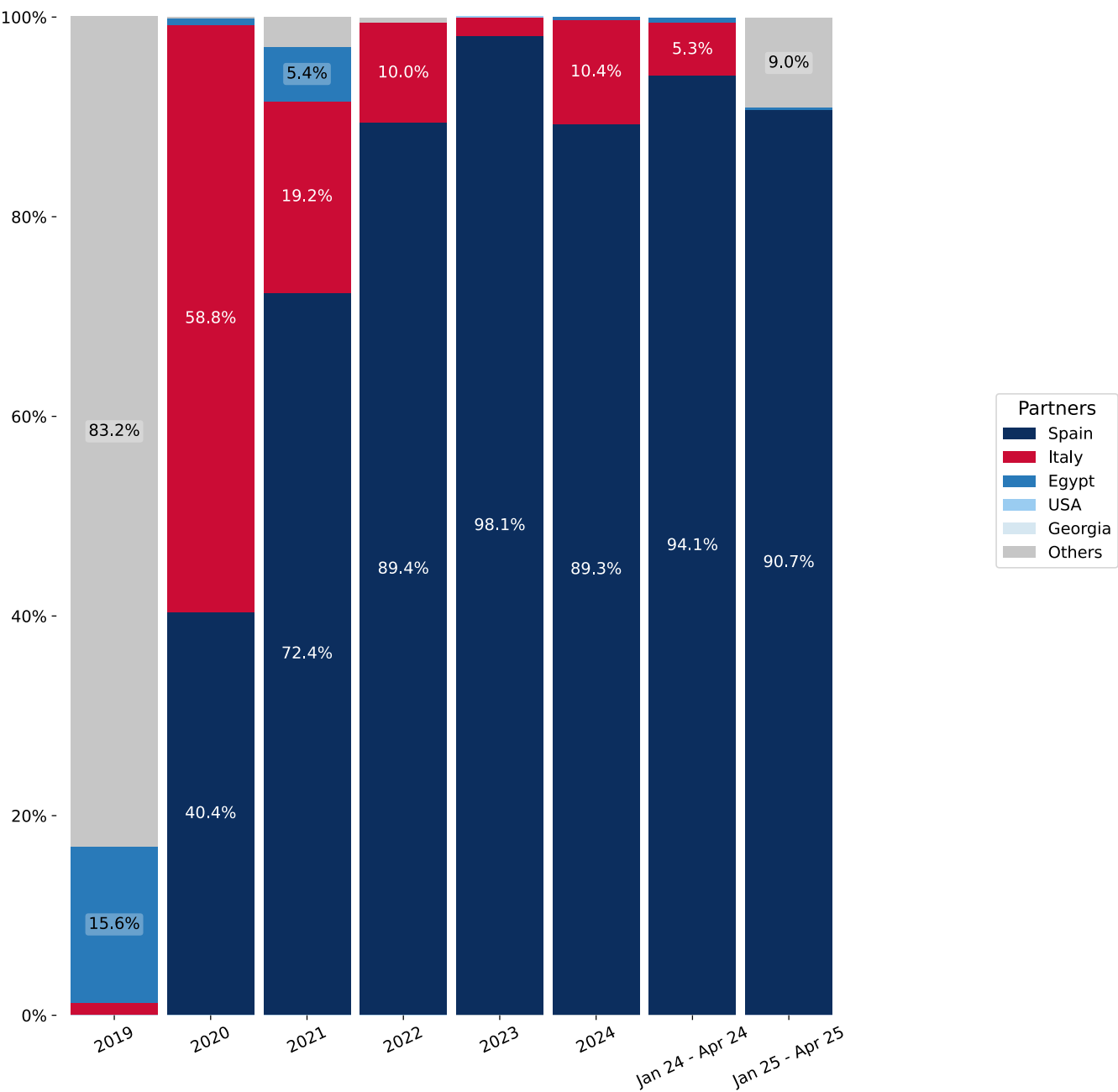
# COMPETITION LANDSCAPE: TRADE PARTNERS, VALUES

This graph allows to observe how the shares of key trade partners have been changing over the years.

In Jan 25 - Apr 25, the shares of the five largest exporters of Lucern (alfalfa) meal and pellets to Saudi Arabia revealed the following dynamics (compared to the same period a year before):

- 1. Spain: -3.4 p.p.
- 2. Italy: -5.3 p.p.
- 3. Egypt: -0.3 p.p.
- 4. USA: 0.0 p.p.
- 5. Georgia: 0.0 p.p.

Figure 14. Largest Trade Partners of Saudi Arabia – Change of the Shares in Total Imports over the Years, K US\$



# COMPETITION LANDSCAPE: TRADE PARTNERS, VALUES

This section provides an analysis of the import dynamics from the top five trade partners, with a focus on imports values.

Figure 15. Saudi Arabia's Imports from Spain, K current US\$

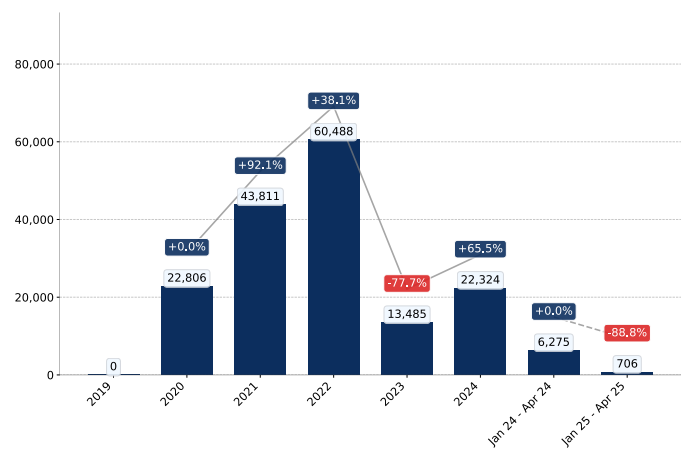


Figure 16. Saudi Arabia's Imports from Lithuania, K current US\$

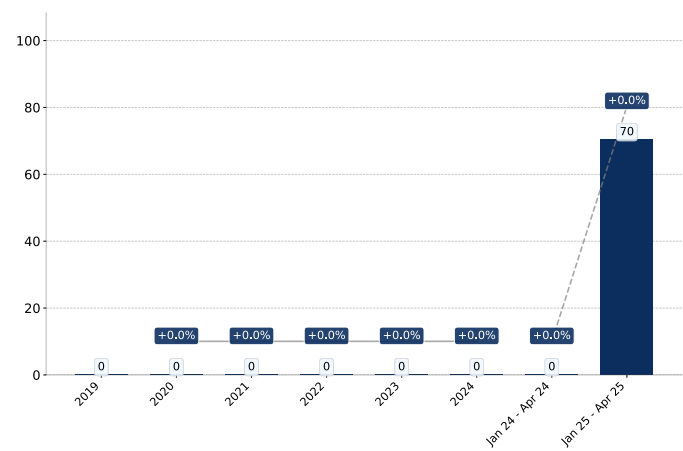


Figure 17. Saudi Arabia's Imports from Egypt, K current US\$

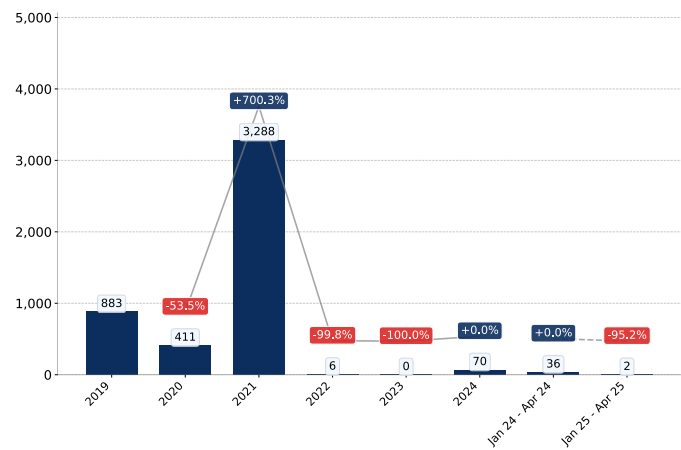


Figure 18. Saudi Arabia's Imports from Italy, K current US\$

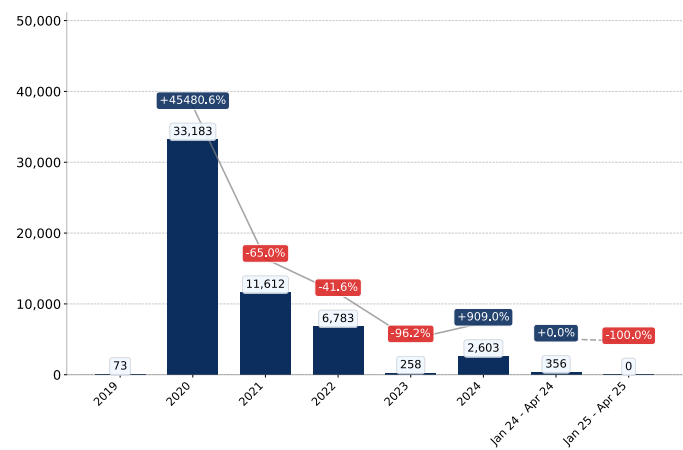
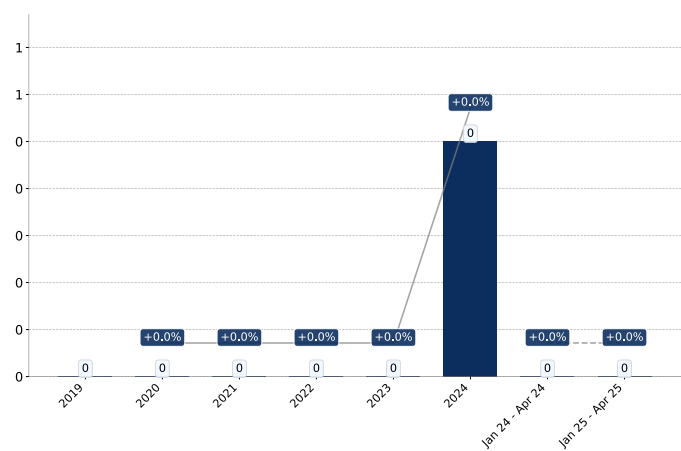


Figure 19. Saudi Arabia's Imports from Georgia, K current US\$



# COMPETITION LANDSCAPE: TRADE PARTNERS, VALUES

The figures in this section demonstrate the monthly dynamics of imports from key trade partners (values) in the most recent 24 months.

Figure 20. Saudi Arabia's Imports from Spain, K US\$

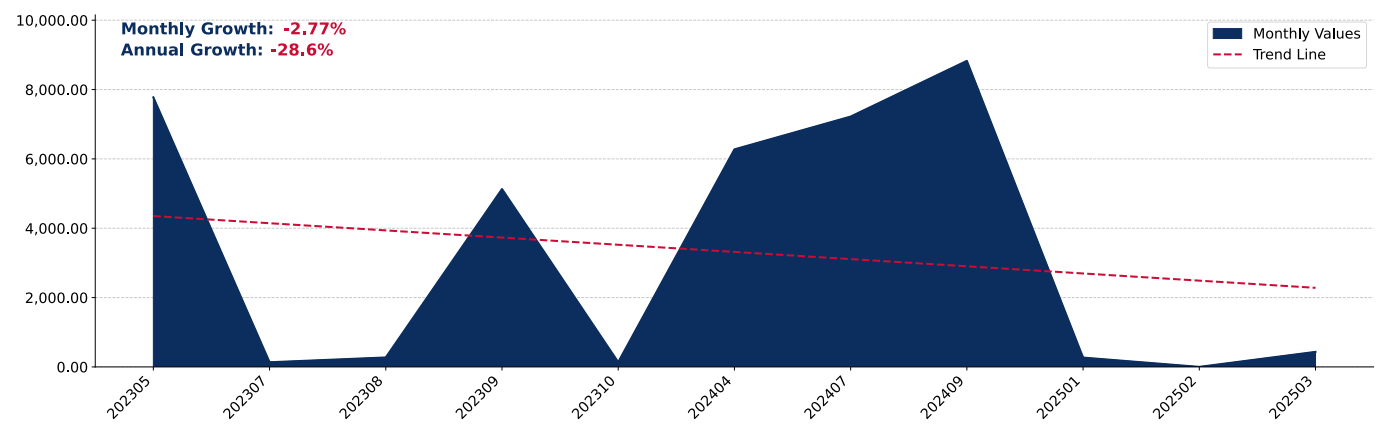


Figure 21. Saudi Arabia's Imports from Italy, K US\$

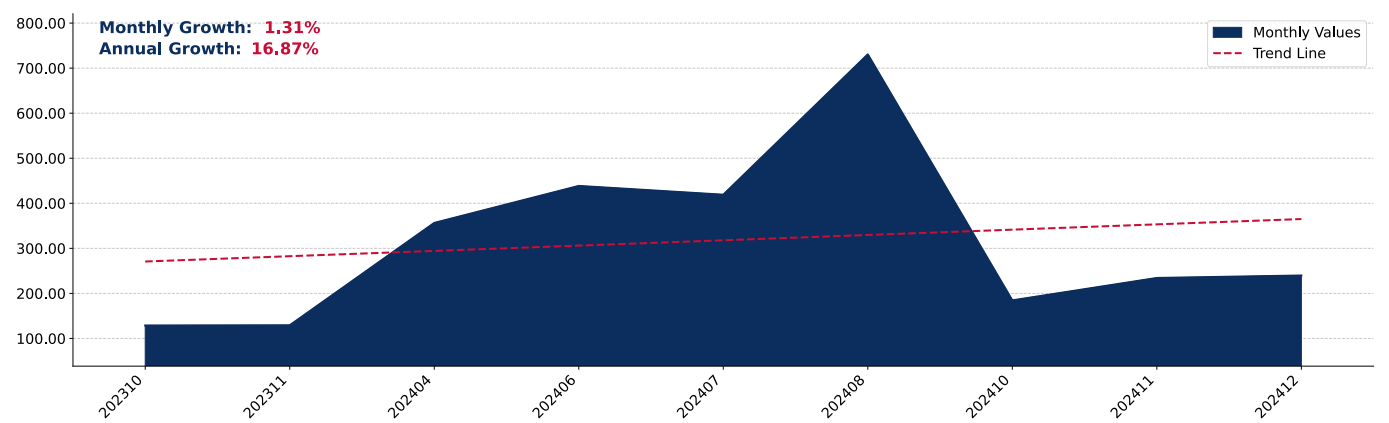
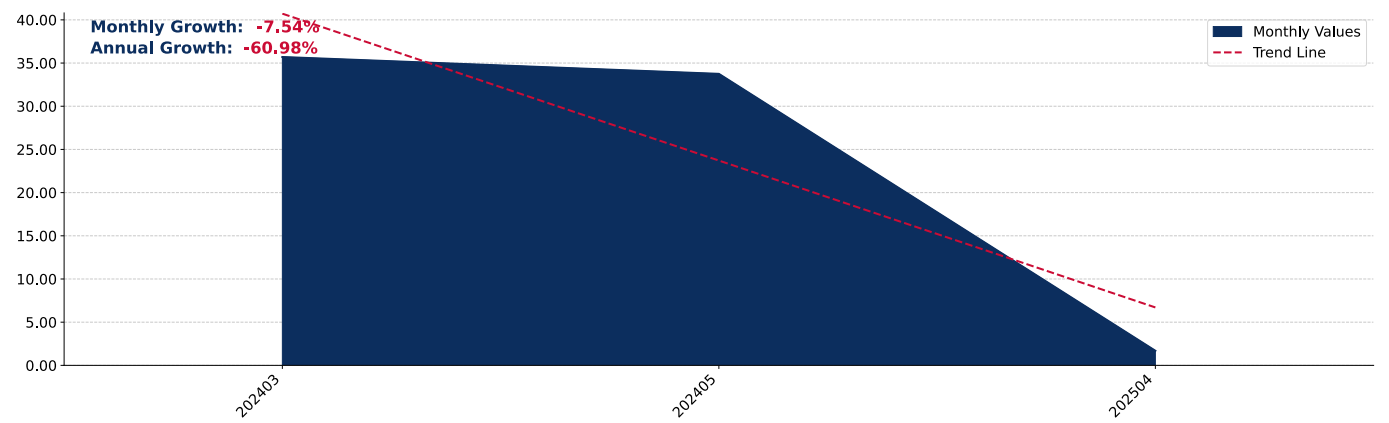


Figure 22. Saudi Arabia's Imports from Egypt, K US\$



# COMPETITION LANDSCAPE: TRADE PARTNERS, VALUES

The figures in this section demonstrate the monthly dynamics of imports from key trade partners (values) in the most recent 24 months.

Figure 28. Saudi Arabia’s Imports from Lithuania, K US\$

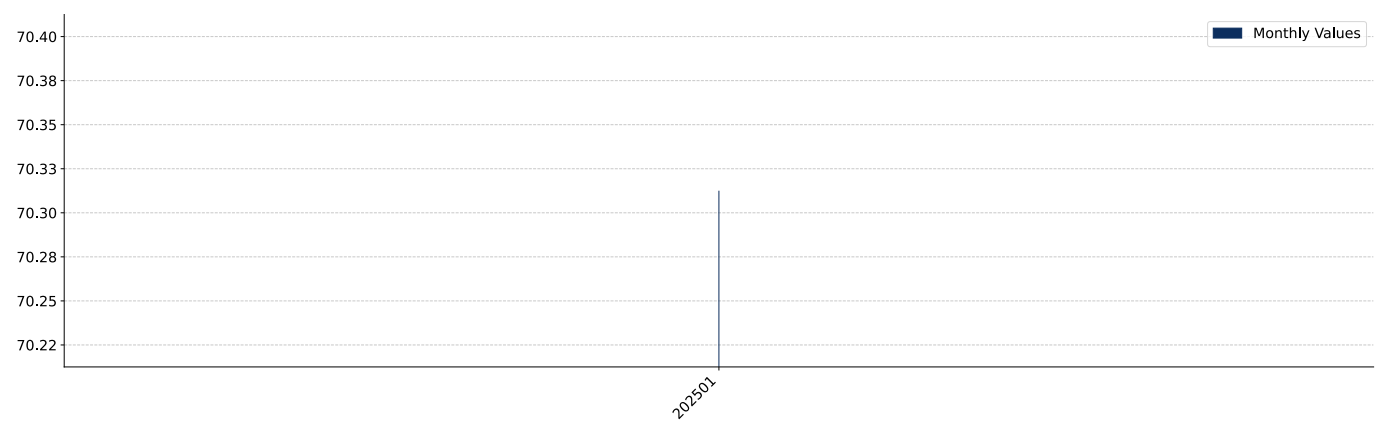
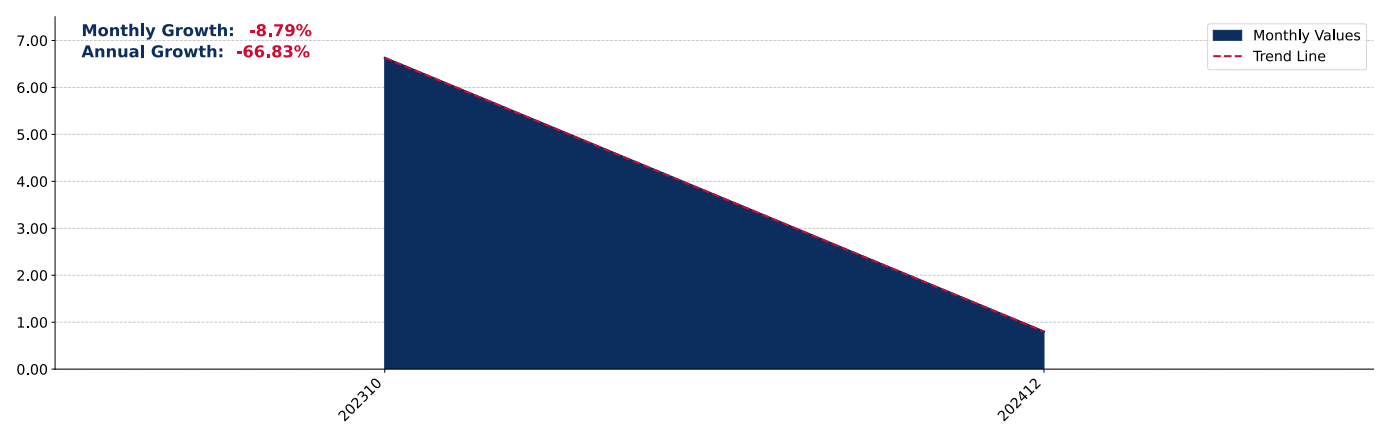


Figure 29. Saudi Arabia’s Imports from USA, K US\$



## COMPETITION LANDSCAPE: TRADE PARTNERS, VOLUMES

This section provides an analysis of the trade partner distribution for the selected product imports to the chosen country, focusing on physical import volumes. The countries listed in the table are ranked from the largest to the smallest trade partners, based on the import volumes from the most recent available calendar year.

By import volumes, expressed in tons, the five largest exporters of Lucern (alfalfa) meal and pellets to Saudi Arabia in 2024 were: Spain, Italy, Egypt, USA and Georgia.

Table 3. Country's Imports by Trade Partners, tons

Partner	2019	2020	2021	2022	2023	2024	Jan 24 - Apr 24	Jan 25 - Apr 25
Spain	0.0	112,061.4	194,590.9	246,881.0	57,247.0	100,603.3	27,985.8	3,960.2
Italy	253.1	158,678.6	53,584.4	25,438.7	1,034.1	11,124.6	1,485.1	0.0
Egypt	3,068.1	1,157.1	9,738.7	51.3	0.0	285.0	150.0	9.5
USA	0.0	264.8	45.4	11.1	416.9	6.6	0.0	0.0
Georgia	0.0	0.0	0.0	0.0	0.0	2.0	0.0	0.0
Argentina	16,029.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Lithuania	0.0	0.0	0.0	0.0	0.0	0.0	0.0	453.6
Belgium	255.4	97.8	0.0	0.0	0.0	0.0	0.0	0.0
Azerbaijan	12.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0
New Zealand	0.0	361.6	0.0	0.0	0.0	0.0	0.0	0.0
South Africa	0.0	0.0	3,785.0	0.0	0.0	0.0	0.0	0.0
Romania	0.0	0.0	1,298.0	505.2	0.0	0.0	0.0	0.0
Ukraine	0.0	0.0	190.9	863.1	0.0	0.0	0.0	0.0
Türkiye	84.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
<b>Total</b>	<b>19,702.8</b>	<b>272,621.1</b>	<b>263,233.2</b>	<b>273,750.4</b>	<b>58,698.0</b>	<b>112,021.5</b>	<b>29,620.9</b>	<b>4,423.2</b>

# COMPETITION LANDSCAPE: TRADE PARTNERS, VOLUMES

This section offers an analysis of the changes in the distribution of trade partners for the selected product imports to the chosen country, with a focus on physical import volumes. The table illustrates how the trade partner distribution has evolved over the analyzed period.

Table 4. Country’s Imports by Trade Partners. Shares in total Imports Volume of the Country.

Partner	2019	2020	2021	2022	2023	2024	Jan 24 - Apr 24	Jan 25 - Apr 25
Spain	0.0%	41.1%	73.9%	90.2%	97.5%	89.8%	94.5%	89.5%
Italy	1.3%	58.2%	20.4%	9.3%	1.8%	9.9%	5.0%	0.0%
Egypt	15.6%	0.4%	3.7%	0.0%	0.0%	0.3%	0.5%	0.2%
USA	0.0%	0.1%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%
Georgia	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Argentina	81.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lithuania	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.3%
Belgium	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Azerbaijan	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
New Zealand	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
South Africa	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Romania	0.0%	0.0%	0.5%	0.2%	0.0%	0.0%	0.0%	0.0%
Ukraine	0.0%	0.0%	0.1%	0.3%	0.0%	0.0%	0.0%	0.0%
Türkiye	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Figure 30. Largest Trade Partners of Saudi Arabia in 2024, tons



The chart shows largest supplying countries and their shares in imports of to in in volume terms (tons). Different colors depict geographic regions.

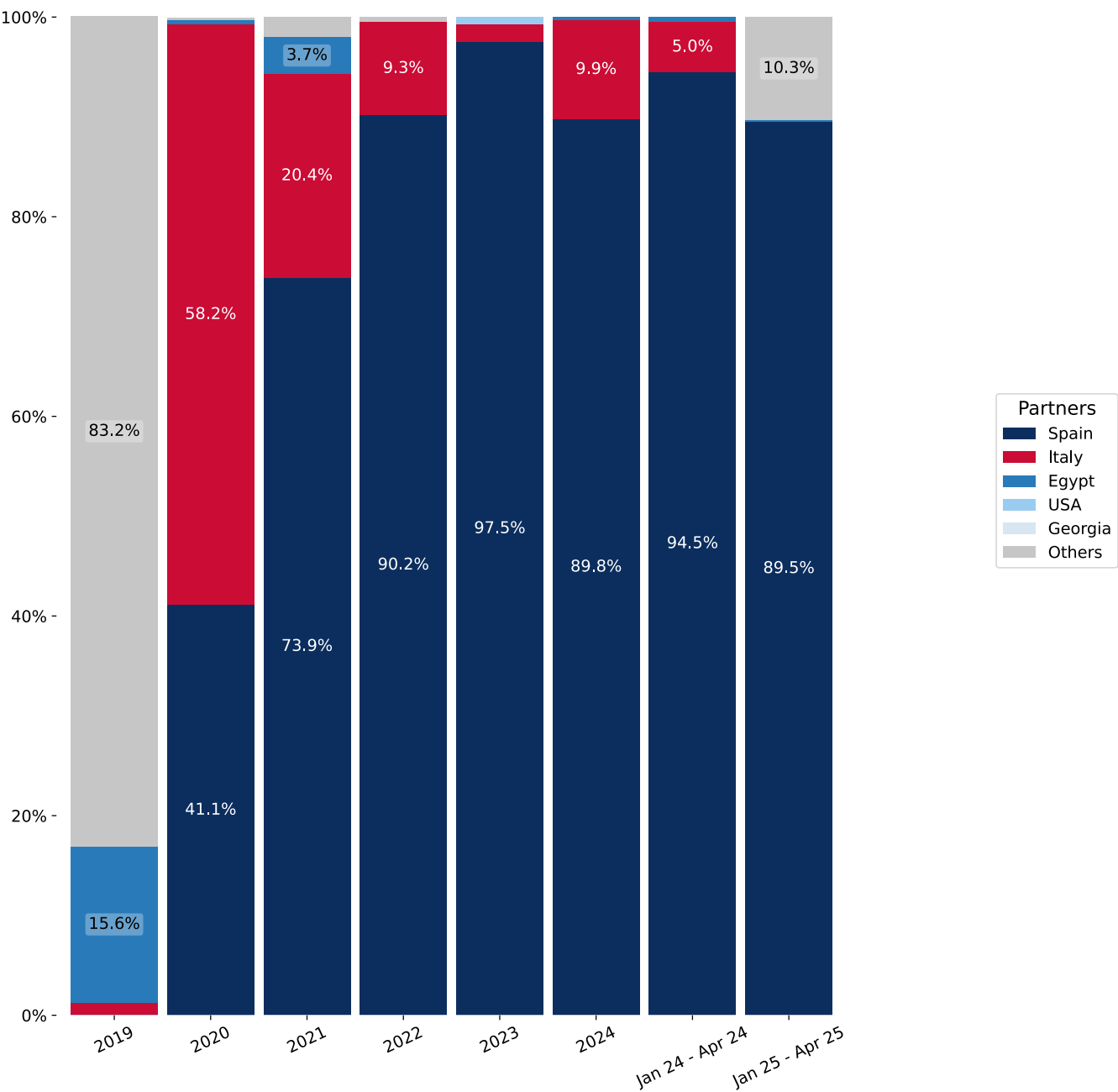
# COMPETITION LANDSCAPE: TRADE PARTNERS, VOLUMES

This graph allows to observe how the shares of key trade partners have been changing over the years.

In Jan 25 - Apr 25, the shares of the five largest exporters of Lucern (alfalfa) meal and pellets to Saudi Arabia revealed the following dynamics (compared to the same period a year before) (in terms of volumes):

- 1. Spain: -5.0 p.p.
- 2. Italy: -5.0 p.p.
- 3. Egypt: -0.3 p.p.
- 4. USA: 0.0 p.p.
- 5. Georgia: 0.0 p.p.

Figure 31. Largest Trade Partners of Saudi Arabia – Change of the Shares in Total Imports over the Years, tons



# COMPETITION LANDSCAPE: TRADE PARTNERS, VOLUMES

This section provides an analysis of the import dynamics from the top five trade partners, with a focus on physical import volumes.

Figure 32. Saudi Arabia's Imports from Spain, tons

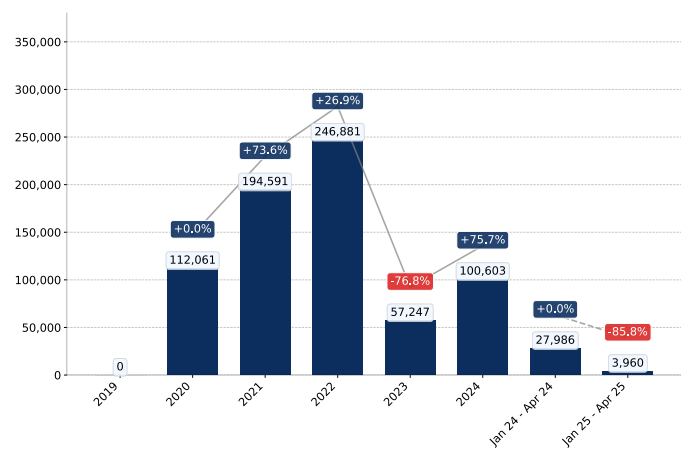


Figure 33. Saudi Arabia's Imports from Lithuania, tons

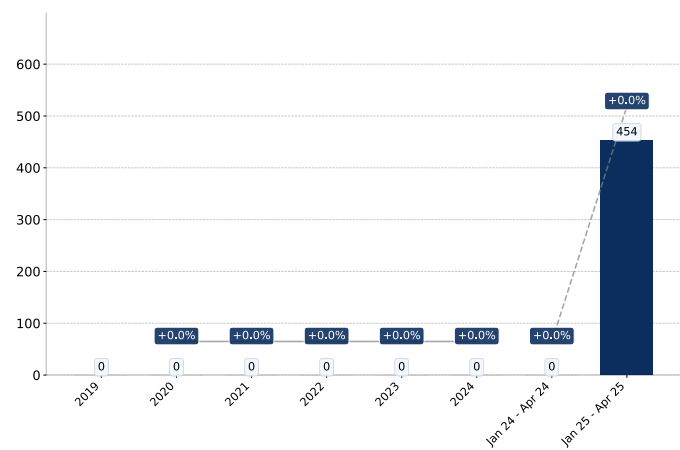


Figure 34. Saudi Arabia's Imports from Egypt, tons

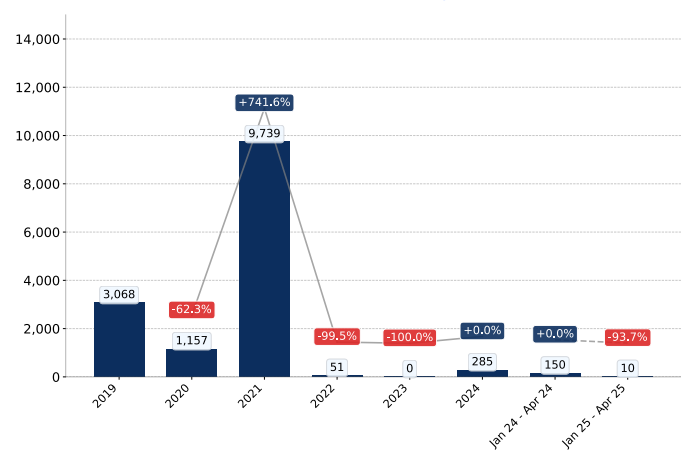


Figure 35. Saudi Arabia's Imports from Italy, tons

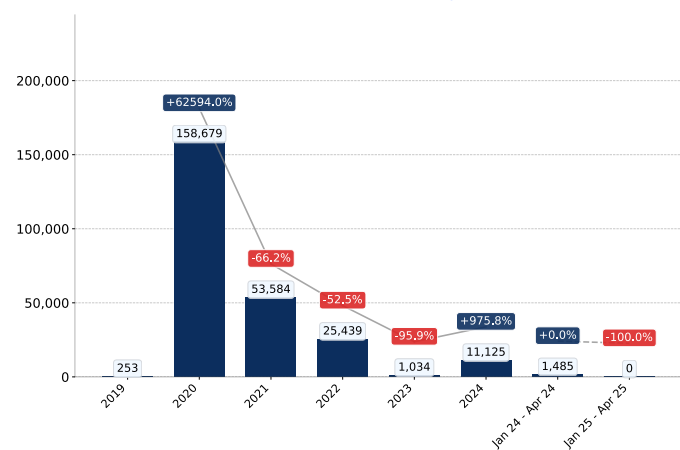
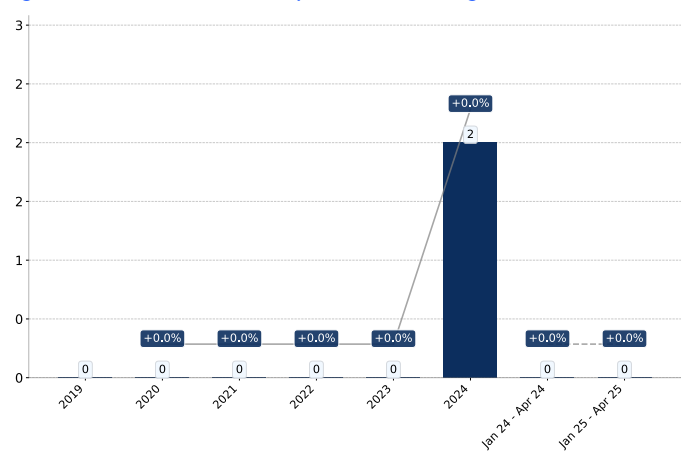


Figure 36. Saudi Arabia's Imports from Georgia, tons





# COMPETITION LANDSCAPE: TRADE PARTNERS, VOLUMES

The figures in this section demonstrate the monthly dynamics of imports from key trade partners (physical volumes) in the most recent 24 months.

Figure 37. Saudi Arabia's Imports from Spain, tons

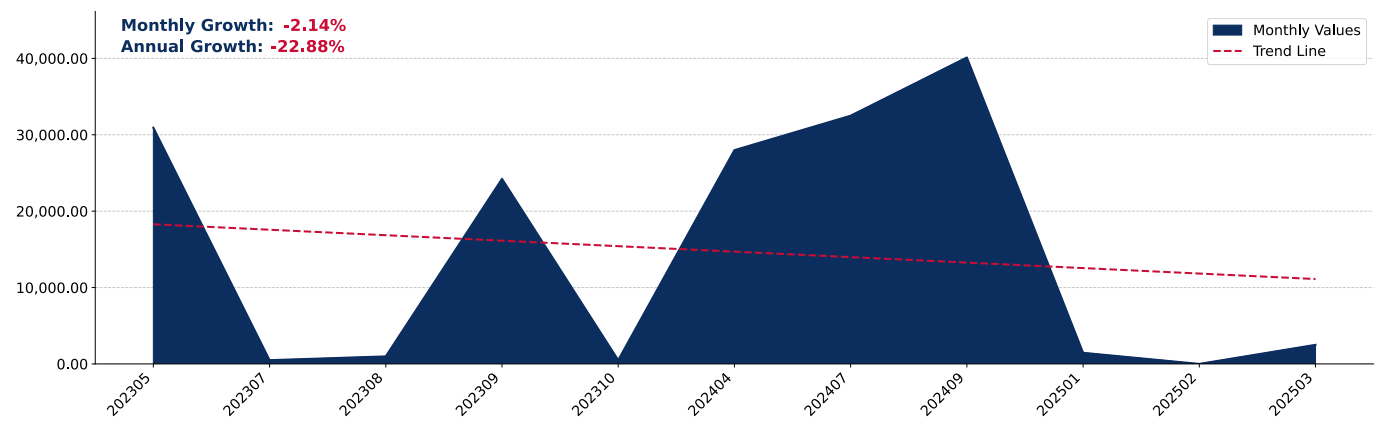


Figure 38. Saudi Arabia's Imports from Italy, tons

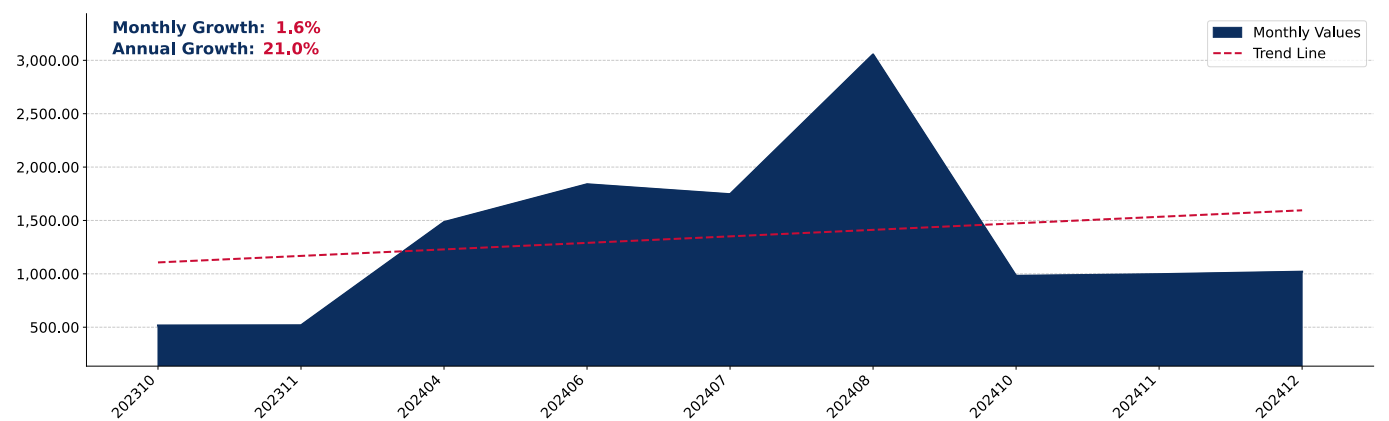
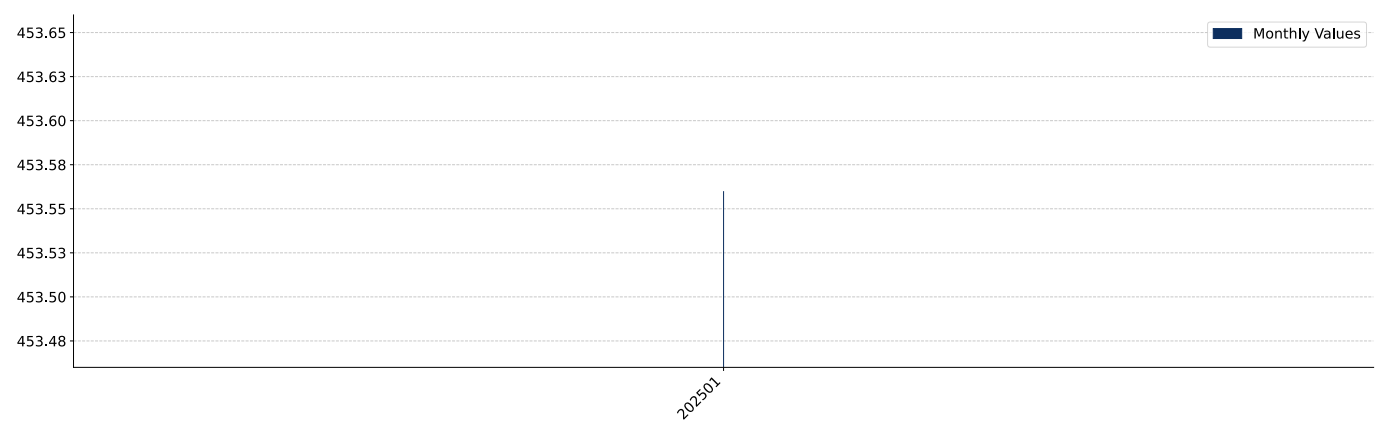


Figure 39. Saudi Arabia's Imports from Lithuania, tons



# COMPETITION LANDSCAPE: TRADE PARTNERS, VOLUMES

The figures in this section demonstrate the monthly dynamics of imports from key trade partners (physical volumes) in the most recent 24 months.

Figure 40. Saudi Arabia's Imports from Egypt, tons

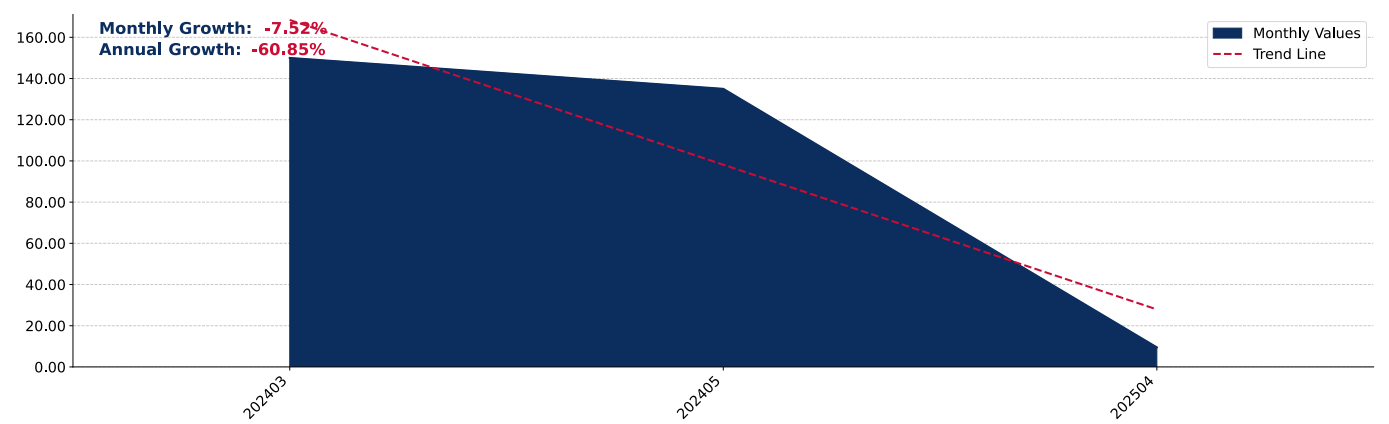
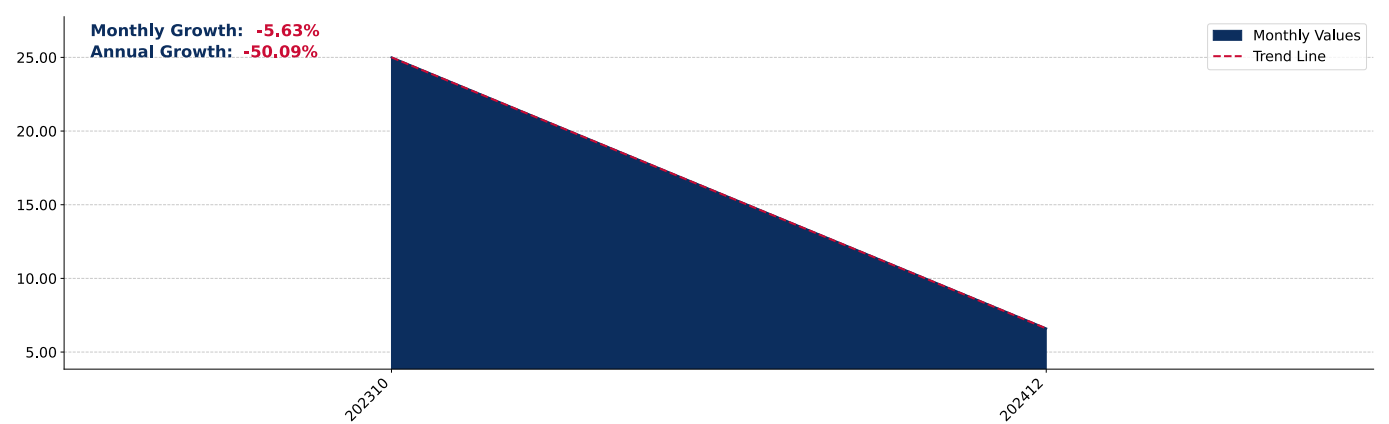


Figure 41. Saudi Arabia's Imports from USA, tons



## COMPETITION LANDSCAPE: TRADE PARTNERS, PRICES

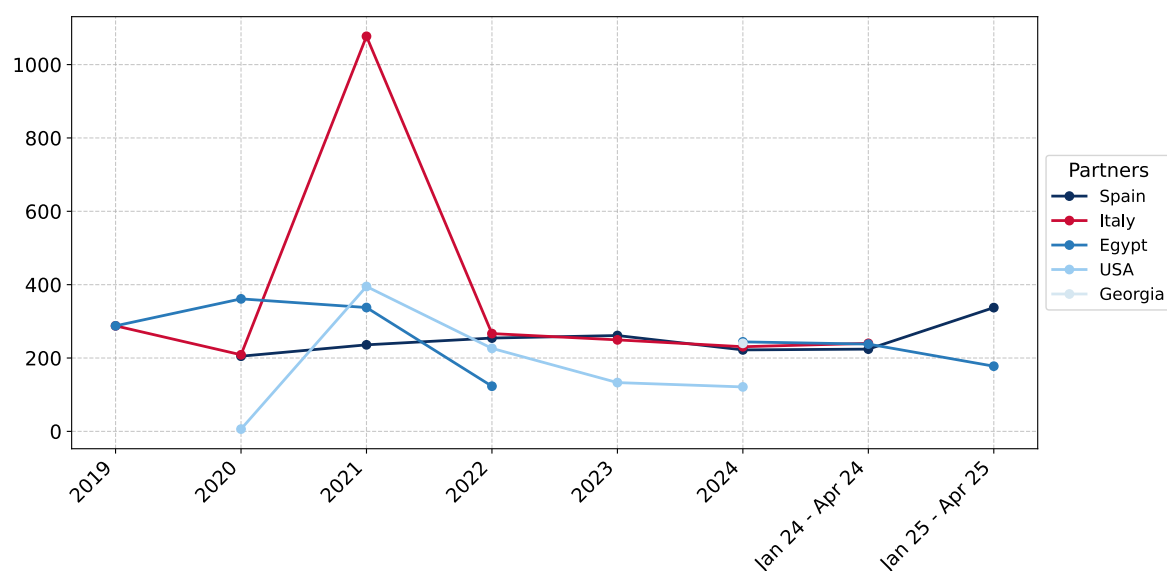
This section shows the average imports prices in recent periods split by trade partners.

Out of top-5 largest supplying countries, the lowest average prices on Lucern (alfalfa) meal and pellets imported to Saudi Arabia were registered in 2024 for USA, while the highest average import prices were reported for Egypt. Further, in Jan 25 - Apr 25, the lowest import prices were reported by Saudi Arabia on supplies from Egypt, while the most premium prices were reported on supplies from Spain.

Table 5. Average Imports Prices by Trade Partners, current US\$ per 1 ton

Partner	2019	2020	2021	2022	2023	2024	Jan 24 - Apr 24	Jan 25 - Apr 25
Spain	-	204.9	236.0	254.4	261.3	222.2	224.2	337.4
Italy	287.7	208.8	1,077.1	266.6	249.5	230.8	240.0	-
Egypt	287.7	361.3	337.7	123.1	-	244.0	238.0	177.7
USA	-	6.2	395.0	226.3	133.0	121.2	-	-
Georgia	-	-	-	-	-	240.0	-	-
Argentina	287.7	-	-	-	-	-	-	-
Lithuania	-	-	-	-	-	-	-	155.0
Belgium	287.7	594.9	-	-	-	-	-	-
Azerbaijan	287.7	-	-	-	-	-	-	-
New Zealand	-	54.1	-	-	-	-	-	-
South Africa	-	-	360.5	-	-	-	-	-
Romania	-	-	287.4	256.5	-	-	-	-
Ukraine	-	-	300.0	250.0	-	-	-	-
Türkiye	287.7	-	-	-	-	-	-	-

Figure 42. Average Imports Prices by Key Trade Partners, current US\$ per 1 ton



# COMPETITION LANDSCAPE: VALUE TERMS

This section offers insights into major suppliers of the selected product to a particular country within the last 12 months. A tree-map chart is used to facilitate the identification and better visualization of primary competitors, illustrating market shares in US\$ terms. Additionally, a diagram highlighting suppliers who experienced significant increases or decreases in market shares during the last 12 months complements the analysis. These are winners or losers from the market share perspective.

Figure 45. Country's Imports by Trade Partners in LTM period, current US\$



Figure 43. Contribution to Growth of Imports in LTM (May 2024 – April 2025),K US\$

GROWTH CONTRIBUTORS

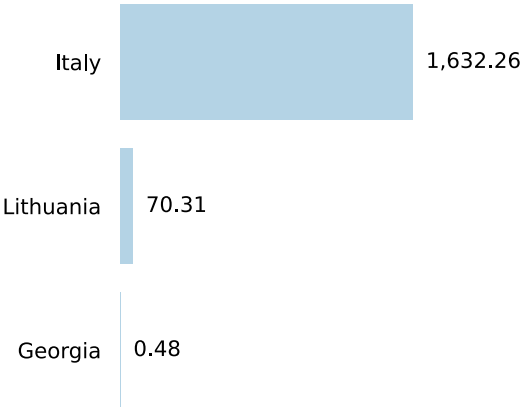
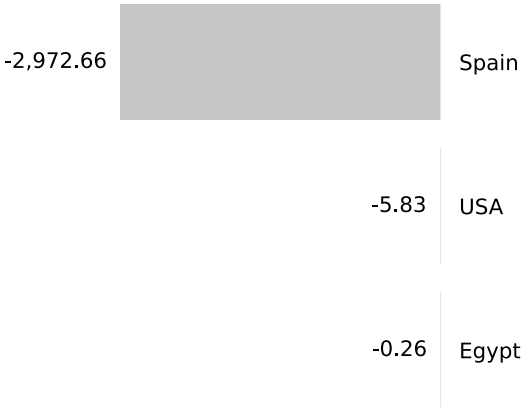


Figure 44. Contribution to Decline of Imports in LTM (May 2024 – April 2025),K US\$

DECLINE CONTRIBUTORS



Total imports change in the period of LTM was recorded at -1,275.7 K US\$

The charts show Top-10 countries with positive and negative contribution to the growth of imports of to in the period of LTM (May 2024 – April 2025 compared to May 2023 – April 2024).

## COMPETITION LANDSCAPE: LTM CHANGES

The tables in this section show the imports by trade partners in last twelve months (LTM) period in terms value and their change compared to the same period 12 months before.

Out of top-15 largest supplying countries, the following trade partners of Saudi Arabia were characterized by the highest increase of supplies of Lucern (alfalfa) meal and pellets by value: Spain, Italy and Lithuania.

Table 6. Country's Imports by Trade Partners in LTM period and its Change Compared to the Same Period 12 Months Before, current US\$

Partner	PreLTM	LTM	Change, %
Spain	19,727.3	16,754.6	-15.1
Italy	614.4	2,246.7	265.7
Lithuania	0.0	70.3	7,031.2
Egypt	35.7	35.4	-0.7
USA	6.6	0.8	-87.9
Georgia	0.0	0.5	48.0
Argentina	0.0	0.0	0.0
Belgium	0.0	0.0	0.0
Azerbaijan	0.0	0.0	0.0
New Zealand	0.0	0.0	0.0
South Africa	0.0	0.0	0.0
Romania	0.0	0.0	0.0
Ukraine	0.0	0.0	0.0
Türkiye	0.0	0.0	0.0
<b>Total</b>	<b>20,384.0</b>	<b>19,108.3</b>	<b>-6.3</b>

# COMPETITION LANDSCAPE: VOLUME TERMS

This section offers insights into major suppliers of the selected product to a particular country within the last 12 months. A tree-map chart is used to facilitate the identification and better visualization of primary competitors, illustrating market shares in Ktons. Additionally, a diagram highlighting suppliers who experienced significant increases or decreases in market shares during the last 12 months complements the analysis. These are winners or losers from the market share perspective.

Figure 48. Country's Imports by Trade Partners in LTM period, tons



Figure 46. Contribution to Growth of Imports in LTM (May 2024 – April 2025), tons

GROWTH CONTRIBUTORS

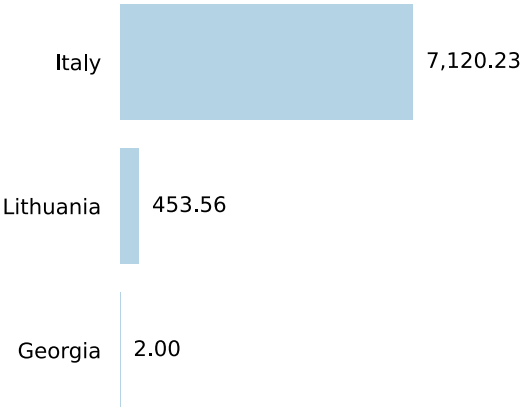
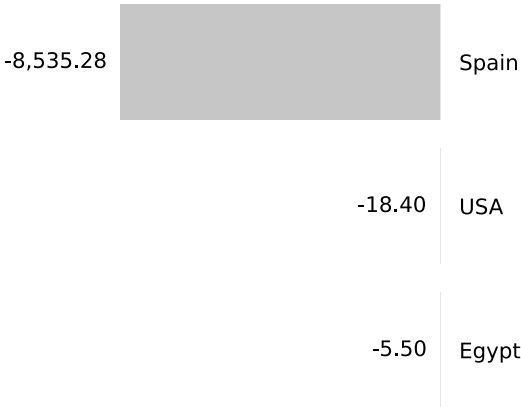


Figure 47. Contribution to Decline of Imports in LTM (May 2024 – April 2025), tons

DECLINE CONTRIBUTORS



Total imports change in the period of LTM was recorded at -983.39 tons

The charts show Top-10 countries with positive and negative contribution to the growth of imports of Lucern (alfalfa) meal and pellets to Saudi Arabia in the period of LTM (May 2024 – April 2025 compared to May 2023 – April 2024).

## COMPETITION LANDSCAPE: LTM CHANGES

The tables in this section show the imports by trade partners in last twelve months (LTM) period in terms volume and their change compared to the same period 12 months before.

Out of top-15 largest supplying countries, the following trade partners of Saudi Arabia were characterized by the highest increase of supplies of Lucern (alfalfa) meal and pellets by volume: Spain, Italy and Lithuania.

Table 7. Country's Imports by Trade Partners in LTM period and its Change Compared to the Same Period 12 Months Before, tons

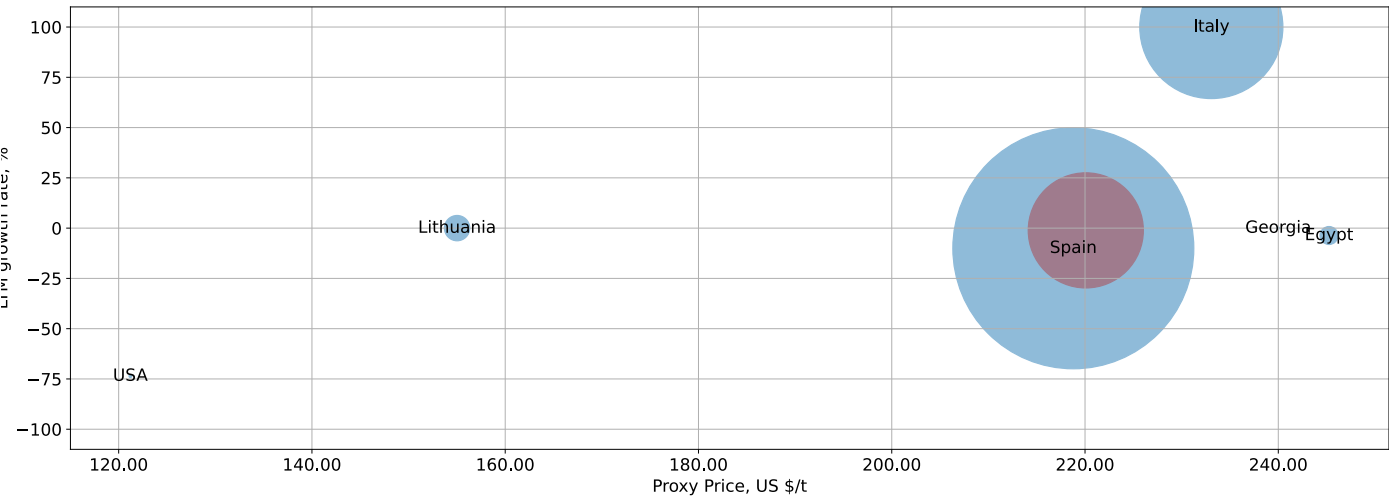
Partner	PreLTM	LTM	Change, %
Spain	85,112.9	76,577.7	-10.0
Italy	2,519.2	9,639.5	282.6
Lithuania	0.0	453.6	45,356.0
Egypt	150.0	144.5	-3.7
USA	25.0	6.6	-73.6
Georgia	0.0	2.0	200.0
Argentina	0.0	0.0	0.0
Belgium	0.0	0.0	0.0
Azerbaijan	0.0	0.0	0.0
New Zealand	0.0	0.0	0.0
South Africa	0.0	0.0	0.0
Romania	0.0	0.0	0.0
Ukraine	0.0	0.0	0.0
Türkiye	0.0	0.0	0.0
<b>Total</b>	<b>87,807.2</b>	<b>86,823.8</b>	<b>-1.1</b>

# COMPETITION LANDSCAPE: CONTRIBUTORS TO GROWTH

This section presents information about the most successful exporters who managed to significantly increase their supplies over last 12 months. The upper-left corner of the chart highlights countries deemed the most aggressive competitors in the market. The horizontal axis measures the proxy price level offered by suppliers, the vertical axis portrays the growth rate of supplies in volume terms, and the bubble size indicates the extent at which a country-supplier contributed to the growth of imports. The chart encompasses the most recent data spanning the past 12 months.

Figure 49. Top suppliers-contributors to growth of imports of to Saudi Arabia in LTM (winners)

Average Imports Parameters:  
LTM growth rate = -1.12%  
Proxy Price = 220.08 US\$ / t



The chart shows the classification of countries who were among the greatest growth contributors in terms of supply of Lucern (alfalfa) meal and pellets to Saudi Arabia:

- Bubble size depicts the volume of imports from each country to Saudi Arabia in the period of LTM (May 2024 – April 2025).
- Bubble's position on X axis depicts the average level of proxy price on imports of Lucern (alfalfa) meal and pellets to Saudi Arabia from each country in the period of LTM (May 2024 – April 2025).
- Bubble's position on Y axis depicts growth rate of imports of Lucern (alfalfa) meal and pellets to Saudi Arabia from each country (in tons) in the period of LTM (May 2024 – April 2025) compared to the corresponding period a year before.
- Red Bubble represents a theoretical "average" country supplier out of the top-10 countries shown in the Chart.

Various factors may cause these 10 countries to increase supply of Lucern (alfalfa) meal and pellets to Saudi Arabia in LTM. Some may be due to the growth of comparative advantages price wise, others may be related to higher quality or better trade conditions. Below is a list of countries, whose proxy price level of supply of Lucern (alfalfa) meal and pellets to Saudi Arabia seemed to be a significant factor contributing to the supply growth:

1. Spain;
2. USA;
3. Lithuania;

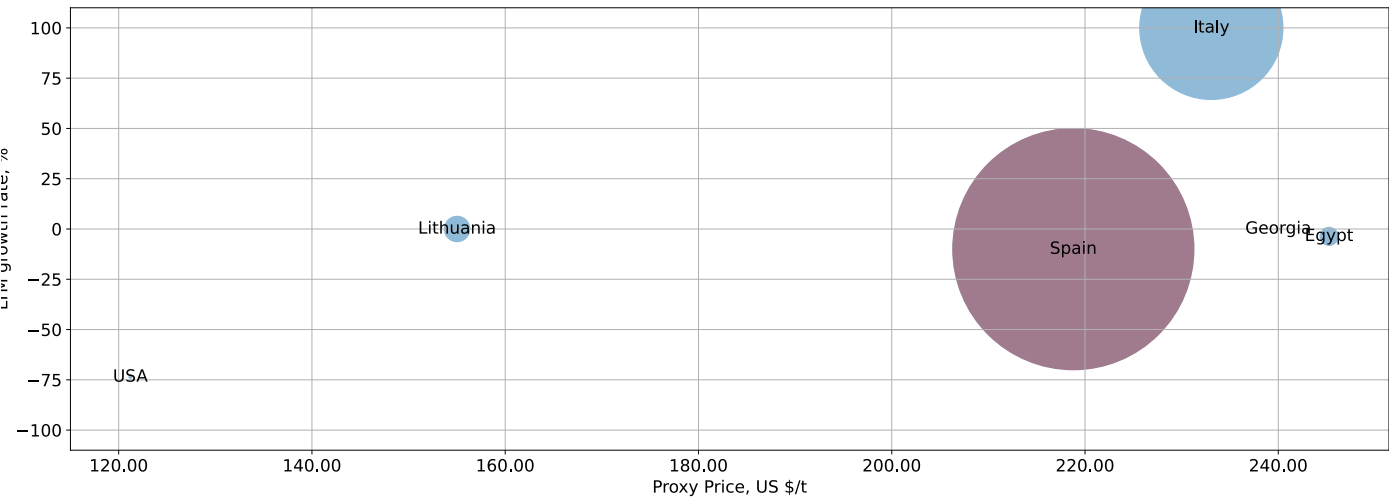


# COMPETITION LANDSCAPE: TOP COMPETITORS

This section provides details about the primary exporters of a particular product to a designated country. To present a comprehensive view, a bubble-chart is employed, showcasing a country's position relative to others. It simultaneously utilizes three indicators: the horizontal axis measures the proxy price level provided by suppliers, the vertical axis indicates the market share growth rate, and the size of the bubble denotes the volume of imports from a country-supplier. Countries positioned in the upper-left corner of the chart are considered the most competitive players in the market. The chart includes the most recent data spanning the past 12 months.

Figure 50. Top-10 Supplying Countries to Saudi Arabia in LTM (May 2024 – April 2025)

Total share of identified TOP-10 supplying countries in Saudi Arabia’s imports in US\$-terms in LTM was 100.0%



The chart shows the classification of countries who are strong competitors in terms of supplies of Lucern (alfalfa) meal and pellets to Saudi Arabia:

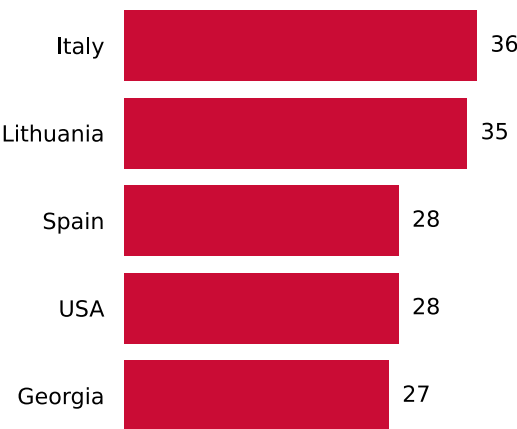
- Bubble size depicts market share of each country in total imports of Saudi Arabia in the period of LTM (May 2024 – April 2025).
- Bubble’s position on X axis depicts the average level of proxy price on imports of Lucern (alfalfa) meal and pellets to Saudi Arabia from each country in the period of LTM (May 2024 – April 2025).
- Bubble’s position on Y axis depicts growth rate of imports Lucern (alfalfa) meal and pellets to Saudi Arabia from each country (in tons) in the period of LTM (May 2024 – April 2025) compared to the corresponding period a year before.
- Red Bubble represents the country with the largest market share.

# COMPETITION LANDSCAPE: TOP COMPETITORS

This section focuses on competition among suppliers and includes a ranking of countries-exporters that are regarded as the most competitive within the last 12 months.

- a) In US\$-terms, the largest supplying countries of Lucern (alfalfa) meal and pellets to Saudi Arabia in LTM (05.2024 - 04.2025) were:
- 1. Spain (16.75 M US\$, or 87.68% share in total imports);
  - 2. Italy (2.25 M US\$, or 11.76% share in total imports);
  - 3. Lithuania (0.07 M US\$, or 0.37% share in total imports);
  - 4. Egypt (0.04 M US\$, or 0.19% share in total imports);
  - 5. USA (0.0 M US\$, or 0.0% share in total imports);
- b) Countries who increased their imports the most (top-5 contributors to total growth in imports in US \$ terms) during the LTM period (05.2024 - 04.2025) were:
- 1. Italy (1.63 M US\$ contribution to growth of imports in LTM);
  - 2. Lithuania (0.07 M US\$ contribution to growth of imports in LTM);
  - 3. Georgia (0.0 M US\$ contribution to growth of imports in LTM);
  - 4. Egypt (-0.0 M US\$ contribution to growth of imports in LTM);
  - 5. USA (-0.01 M US\$ contribution to growth of imports in LTM);
- c) Countries whose price level of imports may have been a significant factor of the growth of supply (out of Top-10 contributors to growth of total imports):
- 1. Spain (219 US\$ per ton, 87.68% in total imports, and -15.07% growth in LTM);
  - 2. USA (121 US\$ per ton, 0.0% in total imports, and -87.94% growth in LTM);
  - 3. Lithuania (155 US\$ per ton, 0.37% in total imports, and 0.0% growth in LTM);
- d) Top-3 high-ranked competitors in the LTM period:
- 1. Italy (2.25 M US\$, or 11.76% share in total imports);
  - 2. Lithuania (0.07 M US\$, or 0.37% share in total imports);
  - 3. Spain (16.75 M US\$, or 87.68% share in total imports);

Figure 51. Ranking of TOP-5 Countries - Competitors



The ranking is a cumulative value of 4 parameters, with the maximum possible score of 40 points. For more information on the methodology, refer to the "Methodology" section.

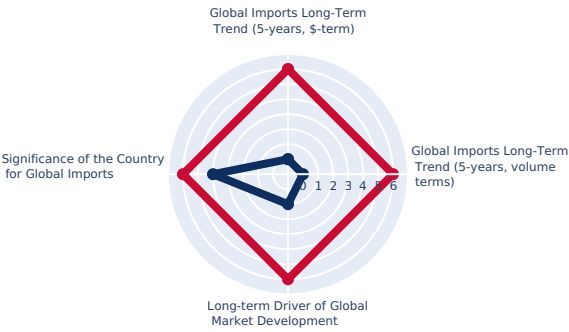
# 7

## CONCLUSIONS

# EXPORT POTENTIAL: RANKING RESULTS -1

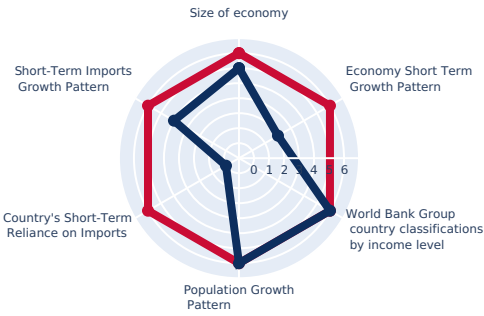
## Component 1: Long-term trends of Global Demand for Imports

Max Score: 24  
Country Score: 5



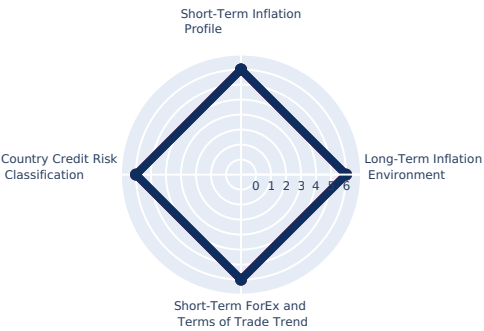
## Component 2: Strength of the Demand for Imports in the selected country

Max Score: 36  
Country Score: 23



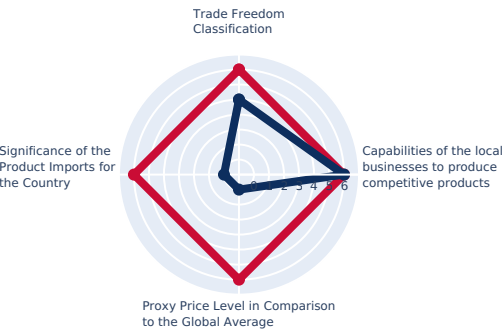
## Component 3: Macroeconomic risks for Imports to the selected country

Max Score: 24  
Country Score: 24



## Component 4: Market entry barriers and domestic competition pressures for imports of the good

Max Score: 24  
Country Score: 10

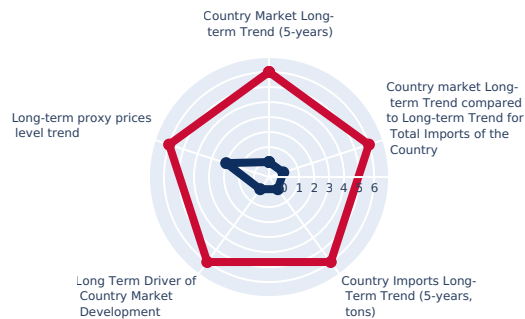


# EXPORT POTENTIAL: RANKING RESULTS -2

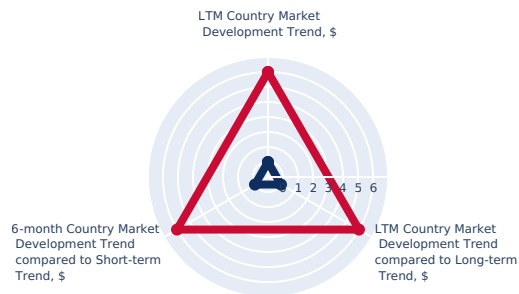
Component 5: Long-term trends of Country Market

Component 6: Short-term trends of Country Market, US\$-terms

Max Score: 30  
Country Score: 2



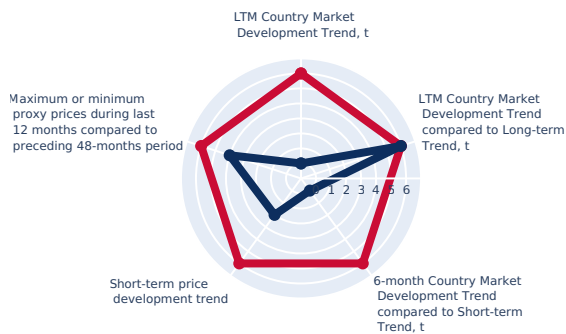
Max Score: 18  
Country Score: 0



Component 7: Short-term trends of Country Market, volumes and proxy prices

Aggregated Country Ranking

Max Score: 30  
Country Score: 12



Max Score: 14  
Country Score: 5



Conclusion: Based on this estimation, the entry potential of this product market can be defined as signifying high risks associated with market entry.

# MARKET VOLUME THAT MAY BE CAPTURED BY A NEW SUPPLIER IN MID-TERM

This concluding section provides an assessment of the attractiveness level of the chosen country for suppliers. It also includes estimations of the market volume that suppliers can potentially fill, represented in both US\$ and Ktons.

## Conclusion:

**Based on recent imports dynamics and high-level analysis of the competition landscape, imports of Lucern (alfalfa) meal and pellets by Saudi Arabia may be expanded to the extent of 46.31 K US\$ monthly, that may be captured by suppliers in a short-term.**

**This estimation holds possible should any significant competitive advantages have been gained.**

A high-level estimation of a share of imports of Lucern (alfalfa) meal and pellets by Saudi Arabia that may be captured by a new supplier or by existing market player in the upcoming short-term period of 6-12 months, includes two major components:

- **Component 1: Potential imports volume supported by Market Growth.** This is a market volume that can be captured by supplier as an effect of the trend related to market growth.
- **Component 2: Expansion of imports due to increase of Competitive Advantages of suppliers.** This is a market volume that can be captured by suppliers with strong competitive advantages, whether price wise or another, more specific and sustainable competitive advantages.

Below is an estimation of supply volumes presented separately for both components. In addition, an integrated component was added to estimate total potential supply of Lucern (alfalfa) meal and pellets to Saudi Arabia.

## Estimation of Component 1 of Volume of Potential Supply, which is supported by Market Growth

24-months development trend (volume terms), monthly growth rate	-2.85 %
Estimated monthly imports increase in case the trend is preserved	-
Estimated share that can be captured from imports increase	-
Potential monthly supply (based on the average level of proxy prices of imports)	-

## Estimation of Component 2 of Volume of Potential Supply, which is supported by Competitive Advantages

The average imports increase in LTM by top-5 contributors to the growth of imports	2,525.26 tons
Estimated monthly imports increase in case of complete advantages	210.44 tons
The average level of proxy price on imports of 121410 in Saudi Arabia in LTM	220.08 US\$/t
Potential monthly supply based on the average level of proxy prices on imports	46.31 K US\$

## Integrated Estimation of Volume of Potential Supply

Component 1. Supply supported by Market Growth	No	0 K US\$
Component 2. Supply supported by Competitive Advantages	46.31 K US\$	
Integrated estimation of market volume that may be added each month	46.31 K US\$	

Note: Component 2 works only in case there are strong competitive advantages in comparison to the largest competitors and top growing suppliers.

# 8

## LIST OF COMPANIES

# LIST OF COMPANIES: DISCLAIMER

This section presents lists of companies generated with the assistance of Google's Gemini AI model. The objective is to help identify potential exporters and buyers of the product under analysis in the country under investigation. These AI-generated insights are designed to complement trade statistics, providing an additional layer of micro-level business intelligence for more informed market entry and partnership decisions.



**AI-Generated Content Notice:** This list of companies has been generated using Google's Gemini AI model. While we've made efforts to ensure accuracy, the information may contain errors or omissions. We recommend verifying critical details through additional sources before making business decisions based on this data.

## Data and Sources:

The company data presented in this section is generated by Google's Gemini AI model based on the product and market parameters provided. The AI analyzes various public sources including company websites, industry reports, business directories, and market databases to identify relevant exporters and buyers. However, this information should be considered as a starting point for further research rather than definitive market intelligence.



# POTENTIAL EXPORTERS

This section provides detailed information about key export companies in the target market, including their business profiles, operations, and management structures.

## Italiana Alfalfa S.p.A.

Revenue 60,000,000\$

**Website:** <https://www.italianaalfalfa.it/>

**Country:** Italy

**Nature of Business:** Producer and Exporter of Dehydrated Alfalfa and Forage

**Product Focus & Scale:** Specializes in high-quality lucerne (alfalfa) meal and pellets, with significant export volumes to the Middle East and other international markets.

**Operations in Importing Country:** Exports to Saudi Arabia through international trading companies and local distributors; no direct physical presence.

**Ownership Structure:** Privately owned.

### COMPANY PROFILE

Italiana Alfalfa S.p.A. is a leading Italian company specializing in the production and commercialization of dehydrated alfalfa and other forage crops. Established with a focus on agricultural innovation and quality, the company operates modern dehydration plants that process freshly harvested lucerne into high-nutritional-value meal and pellets. Their strategic location in prime agricultural regions of Italy allows for efficient sourcing of raw materials and ensures a consistent supply of premium forage products. Italiana Alfalfa is committed to sustainable farming practices and advanced processing techniques. The company's product portfolio primarily includes dehydrated alfalfa pellets and meal, which are highly valued in the animal feed industry for their rich protein, fiber, and vitamin content. These products are crucial for optimizing the diets of dairy cattle, beef cattle, and other livestock, contributing to improved health and productivity. Italiana Alfalfa adheres to stringent quality control standards, from the field to the final product, ensuring that their offerings meet the demanding specifications of international markets. Their production capacity is substantial, enabling them to serve large-scale buyers. Italiana Alfalfa has a robust export strategy, with a significant portion of its production destined for international markets, including the Middle East. Saudi Arabia, with its growing dairy and livestock sectors, represents an important market for their high-quality alfalfa products. While Italiana Alfalfa does not maintain a direct physical presence in Saudi Arabia, they work closely with experienced international trading companies and local distributors who specialize in animal feed imports. This network allows them to effectively reach end-users and respond to market demands in the region. Recent corporate activities include continuous investment in research and development to enhance product quality and processing efficiency, as well as efforts to expand their global distribution network. The company is privately owned, with a management team focused on operational excellence and market expansion. Key executives oversee production, sales, and international logistics, ensuring efficient delivery and customer satisfaction.

### MANAGEMENT TEAM

- Giovanni Rossi (CEO)

### RECENT NEWS

Italiana Alfalfa has been investing in new technologies to improve the nutritional profile and consistency of its dehydrated alfalfa products, aiming to strengthen its position in key export markets like Saudi Arabia.

# POTENTIAL EXPORTERS

This section provides detailed information about key export companies in the target market, including their business profiles, operations, and management structures.

## Gruppo Carli

Turnover 150,000,000\$

**Website:** <https://www.gruppocarli.com/>

**Country:** Italy

**Nature of Business:** Diversified Agricultural and Industrial Group, Producer and Exporter of Dehydrated Alfalfa

**Product Focus & Scale:** Large-scale production and export of dehydrated lucerne (alfalfa) pellets and bales as a key component of their animal feed division.

**Operations in Importing Country:** Exports to Saudi Arabia through international trading partners and distributors; no direct physical presence.

**Ownership Structure:** Family-owned.

### COMPANY PROFILE

Gruppo Carli is a diversified Italian agricultural and industrial group with a long history, dating back to 1909. While their activities span various sectors, including renewable energy and construction, a core part of their business is dedicated to agriculture, particularly the production of animal feed. The group is a significant player in the Italian forage market, leveraging extensive agricultural land and modern processing facilities to produce high-quality lucerne (alfalfa) products. Their integrated approach, from cultivation to processing, ensures control over the entire supply chain. Within its agricultural division, Gruppo Carli is a major producer of dehydrated alfalfa, offering both pellets and bales. These products are known for their high protein content and digestibility, making them essential components for livestock nutrition, especially for dairy and beef cattle. The group's commitment to quality is reflected in its adherence to strict agricultural practices and advanced dehydration technologies that preserve the nutritional value of the forage. Their large-scale operations allow for consistent supply and competitive positioning in the market. Gruppo Carli has a well-established international presence, exporting its agricultural products to various countries worldwide. The Middle East, including Saudi Arabia, is a key export destination for their alfalfa products, driven by the region's substantial demand for high-quality animal feed. While Gruppo Carli does not have a direct office or subsidiary in Saudi Arabia, they engage with the market through a network of experienced international traders and distributors who specialize in agricultural commodities and animal feed. This strategy enables them to effectively serve the Saudi Arabian livestock sector. Recent strategic moves by Gruppo Carli include investments in sustainable farming practices and the modernization of their processing plants to enhance efficiency and reduce environmental impact. The group is family-owned, with a management board that includes President Giancarlo Carli and CEO Marco Carli, who oversee the strategic direction and operational management of the diverse business units. Their focus remains on innovation, sustainability, and expanding their global market reach.

### GROUP DESCRIPTION

Diversified Italian agricultural and industrial group with interests in renewable energy, construction, and animal feed production.

### MANAGEMENT TEAM

- Giancarlo Carli (President)
- Marco Carli (CEO)

### RECENT NEWS

Gruppo Carli has been focusing on enhancing its sustainable agricultural practices and upgrading its forage processing facilities to meet the increasing global demand for high-quality alfalfa, particularly from markets in the Middle East.

# POTENTIAL EXPORTERS

This section provides detailed information about key export companies in the target market, including their business profiles, operations, and management structures.

## Agricola Tre Valli Cooperativa

Turnover 300,000,000\$

**Website:** <https://www.agricolatrevalli.it/>

**Country:** Italy

**Nature of Business:** Agricultural Cooperative, Producer and Exporter of Animal Feed and Forage

**Product Focus & Scale:** Produces and exports lucerne (alfalfa) meal and pellets as a key component of its animal feed operations. Significant production capacity as a large cooperative.

**Operations in Importing Country:** Exports to Saudi Arabia through international trading partners and distributors; no direct physical presence.

**Ownership Structure:** Agricultural Cooperative, owned by its farmer members.

### COMPANY PROFILE

Agricola Tre Valli Cooperativa is a prominent Italian agricultural cooperative based in the Veneto region, known for its extensive operations in animal feed production and agricultural services. Established as a cooperative, it unites numerous farmers, enabling a collective approach to cultivation, processing, and market access. The cooperative model allows for significant scale and efficiency in the production of various agricultural commodities, including high-quality forage crops like alfalfa. Their commitment to supporting local agriculture while meeting international standards is a cornerstone of their philosophy. Within its animal feed division, Agricola Tre Valli is a significant producer of lucerne (alfalfa) meal and pellets. They utilize modern processing techniques to dehydrate and pelletize alfalfa, ensuring the preservation of its nutritional properties, such as high protein and fiber content. These products are vital for the balanced diets of livestock, particularly dairy and beef cattle, contributing to their health and productivity. The cooperative's production capacity is substantial, allowing it to cater to both domestic and international demand for high-quality forage. Agricola Tre Valli actively participates in the international trade of animal feed ingredients, with a focus on markets that require premium forage. The Middle East, including Saudi Arabia, represents an important export destination for their alfalfa products, driven by the region's large-scale livestock and dairy industries. While the cooperative does not maintain a direct physical presence in Saudi Arabia, they work through established international trading companies and distributors who have expertise in the Saudi Arabian market. This indirect approach ensures efficient market penetration and delivery to end-users. Recent initiatives for Agricola Tre Valli include investments in sustainable agricultural practices among its members and the modernization of its feed processing facilities to enhance efficiency and product quality. The cooperative is governed by a board of directors elected from its members, with a management team led by General Manager Paolo Sottana, overseeing the diverse operations and strategic development. Their focus is on continuous improvement and expanding their market reach.

### MANAGEMENT TEAM

- Paolo Sottana (General Manager)

### RECENT NEWS

Agricola Tre Valli has been enhancing its production capabilities for dehydrated forage and optimizing its export logistics to better serve international markets, including the growing demand from Saudi Arabia for high-quality alfalfa.

# POTENTIAL EXPORTERS

This section provides detailed information about key export companies in the target market, including their business profiles, operations, and management structures.

## Alfalfa Italia S.r.l.

Revenue 30,000,000\$

**Website:** <https://www.alfalfaitalia.it/>

**Country:** Italy

**Nature of Business:** Specialized Producer and Exporter of Dehydrated Alfalfa

**Product Focus & Scale:** Exclusive focus on high-quality lucerne (alfalfa) meal and pellets, with significant export volumes to the Middle East and other international markets.

**Operations in Importing Country:** Exports to Saudi Arabia through international trading partners and local distributors; no direct physical presence.

**Ownership Structure:** Privately owned.

### COMPANY PROFILE

Alfalfa Italia S.r.l. is a specialized Italian company dedicated to the production and commercialization of dehydrated alfalfa. Located in agricultural regions known for high-quality forage cultivation, the company focuses exclusively on lucerne processing, ensuring deep expertise and efficiency in its operations. Alfalfa Italia utilizes advanced dehydration technologies to preserve the maximum nutritional value of the alfalfa, making it a premium ingredient for the animal feed industry. Their commitment to quality control is evident throughout the entire production cycle, from field to final product. The company's core product offerings include dehydrated alfalfa pellets and meal, which are characterized by their high protein, fiber, and vitamin content. These products are specifically designed to meet the nutritional requirements of various livestock, particularly dairy cows, beef cattle, and horses, contributing to their overall health and performance. Alfalfa Italia's production facilities are modern and efficient, allowing for consistent output and adherence to international quality and safety standards. Their specialization enables them to offer tailored solutions to their clients. Alfalfa Italia has a strong export orientation, serving a diverse international clientele across Europe, North Africa, and the Middle East. Saudi Arabia is a significant market for their high-quality alfalfa products, driven by the country's substantial demand for premium animal feed for its dairy and livestock sectors. While Alfalfa Italia does not maintain a direct physical presence in Saudi Arabia, they work through a network of established international trading partners and local distributors who possess extensive knowledge of the Saudi market and its import requirements. This indirect approach ensures effective market penetration. Recent corporate developments for Alfalfa Italia include continuous investment in sustainable agricultural practices and the optimization of their dehydration processes to enhance product quality and reduce environmental impact. The company is privately owned, with a management team focused on operational excellence, product innovation, and expanding its global market reach. Key executives oversee production, sales, and international logistics to ensure efficient delivery and customer satisfaction.

### MANAGEMENT TEAM

- Marco Bianchi (General Manager)

### RECENT NEWS

Alfalfa Italia has been implementing new quality control protocols and investing in advanced processing equipment to ensure the highest nutritional value of its alfalfa products for export markets, including Saudi Arabia.

# POTENTIAL EXPORTERS

This section provides detailed information about key export companies in the target market, including their business profiles, operations, and management structures.

## Foragri S.r.l.

Revenue 25,000,000\$

**Website:** <https://www.foragri.it/>

**Country:** Italy

**Nature of Business:** Producer and Exporter of Dehydrated Forage (Alfalfa)

**Product Focus & Scale:** Specializes in high-quality lucerne (alfalfa) meal and pellets, with a focus on export to the Middle East and other international markets.

**Operations in Importing Country:** Exports to Saudi Arabia through international trading companies and local distributors; no direct physical presence.

**Ownership Structure:** Privately owned.

### COMPANY PROFILE

Foragri S.r.l. is an Italian company dedicated to the production and commercialization of dehydrated forage, with a particular focus on alfalfa. Situated in agriculturally rich regions of Italy, Foragri leverages modern farming techniques and advanced dehydration processes to produce high-quality lucerne products for the animal feed industry. The company's operations are designed to ensure the preservation of the natural nutritional properties of alfalfa, making it a valuable component in livestock diets. Foragri emphasizes sustainable sourcing and efficient processing to meet market demands. Foragri's product line includes dehydrated alfalfa pellets and meal, which are highly regarded for their consistent quality, high protein content, and digestibility. These products are essential for various livestock, including dairy cows, beef cattle, and sheep, contributing to their health, growth, and milk production. The company's production facilities are equipped with state-of-the-art machinery, allowing for high-volume output while maintaining strict quality control standards. Their commitment to excellence has positioned them as a reliable supplier in the forage market. Foragri actively exports its dehydrated alfalfa products to a range of international markets, including those in the Middle East. Saudi Arabia is a key destination for their products, driven by the country's significant and expanding livestock and dairy sectors. While Foragri does not maintain a direct physical presence or office in Saudi Arabia, they facilitate their exports through established international trading companies and local distributors who possess strong networks and expertise in the Saudi Arabian animal feed market. This approach ensures efficient distribution and market reach. Recent corporate activities for Foragri include investments in optimizing their supply chain and logistics to enhance efficiency in international shipments. They are also focused on continuous improvement in their processing technologies to further enhance product quality and consistency. The company is privately owned, with a management team dedicated to operational excellence and expanding its global market presence. Key executives oversee production, sales, and international trade relations.

### MANAGEMENT TEAM

- Roberto Conti (Commercial Director)

### RECENT NEWS

Foragri has been streamlining its export operations and investing in advanced packaging solutions to ensure the integrity and quality of its dehydrated alfalfa products during transit to international markets, including Saudi Arabia.

# POTENTIAL EXPORTERS

This section provides detailed information about key export companies in the target market, including their business profiles, operations, and management structures.

## Grupo AN

Turnover 1,500,000,000\$

**Website:** <https://www.grupoan.com/>

**Country:** Spain

**Nature of Business:** Agricultural Cooperative, Producer and Exporter of Animal Feed Ingredients

**Product Focus & Scale:** Large-scale production and export of lucerne (alfalfa) meal and pellets, alongside other cereals, oilseeds, and processed agricultural products. Their capacity allows for significant volumes to be exported globally.

**Operations in Importing Country:** No direct office or subsidiary in Saudi Arabia, but exports to the region are facilitated through established trading partners and distributors.

**Ownership Structure:** Cooperative, owned by its farmer members.

### COMPANY PROFILE

Grupo AN is one of Spain's largest agricultural cooperatives, established in 1910. It operates across various agricultural sectors, including cereals, oilseeds, fruit, vegetables, and animal feed. The cooperative model allows for significant scale in production and processing, making it a major player in the Spanish agricultural export market. Its integrated supply chain, from cultivation to processing and distribution, ensures consistent quality and volume for international buyers. The group's extensive network of farmer members contributes to its robust production capacity, particularly for forage crops like alfalfa. As a leading producer of animal feed ingredients, Grupo AN processes substantial quantities of lucerne (alfalfa) into meal and pellets. Their facilities are equipped with modern technology for drying, pelletizing, and packaging, adhering to international quality standards. The scale of their operations positions them as a significant exporter, capable of fulfilling large orders for livestock feed manufacturers and distributors globally. Their product range is designed to meet the nutritional requirements of various animal species, including dairy cattle, which are prevalent in the Saudi Arabian market. While Grupo AN does not maintain a direct subsidiary or office in Saudi Arabia, their export strategy involves working with established distributors and trading partners in the Middle East. They actively participate in international trade fairs and maintain relationships with key importers to facilitate the flow of their products into the region. Their focus on quality and reliability has helped them build a reputation as a trusted supplier in demanding markets. The cooperative structure means ownership is distributed among its farmer members, ensuring a focus on agricultural production and sustainability. Recent activities include continued investment in processing technologies to enhance efficiency and product quality, as well as efforts to expand their market reach in regions with high demand for animal feed, such as the Gulf Cooperation Council (GCC) countries. The cooperative's management board includes President Francisco Arrarás and General Director Gregorio Gorría, who oversee the strategic direction and operational execution of the diverse agricultural businesses.

### MANAGEMENT TEAM

- Francisco Arrarás (President)
- Gregorio Gorría (General Director)

### RECENT NEWS

Grupo AN has been focusing on optimizing its logistics and supply chain to better serve international markets, including the Middle East, for its forage products. They have also invested in sustainable farming practices among their members to ensure long-term supply stability.

# POTENTIAL EXPORTERS

This section provides detailed information about key export companies in the target market, including their business profiles, operations, and management structures.

## Alfalfa de Aragón S.A.

Revenue 50,000,000\$

**Website:** <https://www.alfalfadearagon.com/>

**Country:** Spain

**Nature of Business:** Specialized Producer and Exporter of Dehydrated Alfalfa

**Product Focus & Scale:** Primary focus on dehydrated lucerne (alfalfa) in pellet, meal, and bale forms. Significant export volumes to North Africa and the Middle East.

**Operations in Importing Country:** No direct presence in Saudi Arabia, but maintains strong export relationships with Saudi importers and distributors.

**Ownership Structure:** Privately owned.

### COMPANY PROFILE

Alfalfa de Aragón S.A. is a specialized Spanish company dedicated to the production and processing of dehydrated alfalfa. Located in the Ebro Valley, a prime agricultural region for alfalfa cultivation, the company benefits from optimal growing conditions and a long tradition of forage production. Established with a focus on quality and efficiency, Alfalfa de Aragón has developed advanced dehydration techniques to preserve the nutritional value of lucerne, making it a high-quality ingredient for animal feed. Their operations encompass the entire process from harvesting to pelletizing and packaging. The company's product portfolio primarily consists of dehydrated alfalfa in various forms, including pellets, bales, and meal. These products are highly sought after by livestock farmers, particularly for dairy cattle, due to their high protein and fiber content. Alfalfa de Aragón emphasizes strict quality control throughout its production chain, ensuring that its products meet stringent international standards. This commitment to quality has enabled them to establish a strong presence in competitive export markets, including those in the Middle East. Alfalfa de Aragón actively exports its products to numerous countries, with a significant focus on markets in North Africa and the Arabian Peninsula, where demand for high-quality forage is substantial. While they do not have a physical presence in Saudi Arabia, they work closely with importers and distributors who specialize in animal feed ingredients for the Saudi livestock sector. Their export strategy is built on direct engagement with large-scale buyers and participation in relevant international trade events to showcase their products and capabilities. The company is privately owned and operates with a lean management structure focused on agricultural excellence. Recent developments include investments in energy-efficient dehydration technologies to reduce their environmental footprint and enhance production capacity. They also continuously monitor market demands to tailor their product offerings, ensuring they remain a preferred supplier for lucerne products. The management team, including CEO José Luis Romeo, is focused on expanding their global reach and maintaining their reputation for premium quality alfalfa products.

### MANAGEMENT TEAM

- José Luis Romeo (CEO)

### RECENT NEWS

Alfalfa de Aragón has recently upgraded its dehydration facilities to improve energy efficiency and increase production output, aiming to meet growing international demand for high-quality alfalfa pellets, particularly from the Middle East.

# POTENTIAL EXPORTERS

This section provides detailed information about key export companies in the target market, including their business profiles, operations, and management structures.

## Dehytec S.A.

Revenue 40,000,000\$

**Website:** <https://www.dehytec.com/>

**Country:** Spain

**Nature of Business:** Producer and Exporter of Dehydrated Forage (Alfalfa)

**Product Focus & Scale:** Specializes in high-quality lucerne (alfalfa) meal and pellets for animal feed, with significant export volumes to the Middle East.

**Operations in Importing Country:** Exports to Saudi Arabia via a network of agents and distributors; no direct physical presence.

**Ownership Structure:** Privately owned.

### COMPANY PROFILE

Dehytec S.A. is a prominent Spanish company specializing in the dehydration and processing of forage crops, particularly alfalfa. Based in the agricultural heartland of Spain, Dehytec leverages advanced technology to produce high-quality lucerne meal and pellets for the animal feed industry. The company's operations are vertically integrated, from sourcing raw materials from local farmers to processing, quality control, and international distribution. Their commitment to preserving the nutritional integrity of alfalfa through efficient dehydration processes is a cornerstone of their business model. The product range of Dehytec includes various grades of alfalfa pellets and meal, tailored to the specific needs of different livestock, including dairy cows, beef cattle, and small ruminants. Their products are characterized by high protein content, digestibility, and consistent quality, making them valuable components in balanced animal diets. Dehytec's production facilities are equipped with modern machinery, ensuring high capacity and adherence to strict hygiene and safety standards, which are critical for export markets. Dehytec has a well-established export network, serving customers across Europe, North Africa, and the Middle East. Saudi Arabia represents a key market for their high-quality alfalfa products due to the country's significant livestock and dairy sectors. While they do not operate a physical office in Saudi Arabia, they work through a network of trusted agents and distributors who have deep market knowledge and established relationships with local buyers. This indirect presence allows them to effectively penetrate the Saudi market and respond to local demand. In recent years, Dehytec has focused on sustainable production practices and continuous improvement in processing technology to enhance product quality and reduce environmental impact. The company is privately held, with a management team dedicated to operational excellence and market expansion. Key executives oversee production, sales, and international logistics to ensure efficient delivery to global clients. Their strategic focus includes strengthening their position in high-growth markets like the GCC region.

### MANAGEMENT TEAM

- Juan Carlos Pérez (General Manager)

### RECENT NEWS

Dehytec has been investing in new drying technologies to increase efficiency and reduce energy consumption in its alfalfa processing plants, aiming to boost export volumes to key markets including Saudi Arabia.



# POTENTIAL EXPORTERS

This section provides detailed information about key export companies in the target market, including their business profiles, operations, and management structures.

## Forrajes y Proteínas S.A. (FOPROTE)

Revenue 35,000,000\$

**Website:** <https://www.foprote.com/>

**Country:** Spain

**Nature of Business:** Producer and Exporter of Dehydrated Forage

**Product Focus & Scale:** Specializes in dehydrated lucerne (alfalfa) pellets and meal, with a strong export presence in the Middle East and North Africa.

**Operations in Importing Country:** Exports to Saudi Arabia through trading companies and local distributors; no direct physical presence.

**Ownership Structure:** Privately owned.

### COMPANY PROFILE

Forrajes y Proteínas S.A. (FOPROTE) is a Spanish company specializing in the production and commercialization of dehydrated forage, with a strong emphasis on alfalfa. Located in areas known for their agricultural productivity, FOPROTE has developed expertise in transforming freshly harvested lucerne into high-quality meal and pellets. The company's operations are characterized by modern processing facilities that ensure the preservation of essential nutrients, making their products ideal for animal nutrition. FOPROTE's commitment to quality control spans from the selection of raw materials to the final packaging and logistics. FOPROTE's primary product offerings include dehydrated alfalfa pellets and meal, which are rich in protein, fiber, and vitamins. These products are essential for livestock farming, particularly for dairy and beef cattle, as they contribute to improved animal health and productivity. The company's production capacity is substantial, allowing it to cater to both domestic and international demand. Their focus on consistent product specifications and reliable supply has earned them a reputable position in the global forage market. As an active exporter, FOPROTE has established trade relationships with various countries, including those in the Middle East. Saudi Arabia is a significant market for their alfalfa products, driven by the country's large-scale dairy and livestock operations. While FOPROTE does not maintain a direct office in Saudi Arabia, they engage with the market through experienced trading companies and local distributors who manage the import and distribution processes. This approach allows them to leverage local expertise and efficiently serve their Saudi Arabian clientele. Recent strategic initiatives for FOPROTE include enhancing their logistical capabilities to streamline international shipments and exploring new agricultural technologies to optimize alfalfa cultivation and processing. The company is privately owned, with a management team focused on sustainable growth and expanding its global footprint. Key personnel are involved in ensuring product quality, managing international sales, and fostering long-term client relationships.

### MANAGEMENT TEAM

- Manuel García (Commercial Director)

### RECENT NEWS

FOPROTE has been working on improving its export logistics to better serve the Middle Eastern market, including Saudi Arabia, ensuring timely delivery of its dehydrated alfalfa products.

# POTENTIAL EXPORTERS

This section provides detailed information about key export companies in the target market, including their business profiles, operations, and management structures.

## Agropecuaria del Pirineo S.C.L. (AGROPAL)

Turnover 250,000,000\$

**Website:** <https://www.agropal.es/>

**Country:** Spain

**Nature of Business:** Agricultural Cooperative, Producer and Exporter of Animal Feed and Forage

**Product Focus & Scale:** Produces and exports lucerne (alfalfa) meal and pellets as part of its broader animal feed operations. Significant production capacity as a large cooperative.

**Operations in Importing Country:** Exports to Saudi Arabia through international trading partners and distributors; no direct physical presence.

**Ownership Structure:** Agricultural Cooperative, owned by its farmer members.

### COMPANY PROFILE

Agropecuaria del Pirineo S.C.L. (AGROPAL) is a Spanish agricultural cooperative with a broad range of activities, including the production and commercialization of animal feed. Founded by farmers in the Pyrenees region, AGROPAL has grown to become a significant player in the Spanish agricultural sector. Their operations include the cultivation, processing, and distribution of various agricultural products, with a strong focus on forage crops like alfalfa. The cooperative model ensures that the interests of its farmer members are aligned with sustainable and high-quality production practices. AGROPAL produces high-quality lucerne (alfalfa) meal and pellets, which are integral components of their animal feed division. Their processing facilities are designed to maintain the nutritional integrity of the forage, providing a consistent and reliable source of protein and fiber for livestock. The cooperative's scale allows for efficient production and competitive pricing, making their alfalfa products attractive to both domestic and international buyers. They adhere to stringent quality control measures throughout the production process. While AGROPAL's primary market is Spain, they actively engage in export activities, particularly for their specialized animal feed ingredients. The Middle East, including Saudi Arabia, represents an important export destination for their alfalfa products, driven by the region's demand for high-quality feed for its growing dairy and livestock industries. AGROPAL typically works with established international trading partners and distributors to facilitate their exports to Saudi Arabia, leveraging their expertise in logistics and market penetration. They do not have a direct physical presence in the importing country. Recent initiatives at AGROPAL include investments in modernizing their feed mills and forage processing plants to increase efficiency and expand capacity. They are also focused on promoting sustainable agriculture among their members. The cooperative is governed by a board of directors elected from its members, with a management team led by General Director Ricardo Corredor, overseeing the diverse operations and strategic development.

### MANAGEMENT TEAM

- Ricardo Corredor (General Director)

### RECENT NEWS

AGROPAL has been expanding its animal feed production capacity and optimizing its supply chain to enhance its export capabilities for forage products to international markets, including the Middle East.

# POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

## Almarai Company

Revenue 4,800,000,000\$

*Integrated Dairy, Food, and Beverage Manufacturer and Distributor*

**Website:** <https://www.almarai.com/>

**Country:** Saudi Arabia

**Product Usage:** Directly used in own animal feed manufacturing for its extensive dairy and livestock farms.

**Ownership Structure:** Publicly listed company (Saudi Exchange: 2280).

### COMPANY PROFILE

Almarai Company is the largest integrated dairy foods company in the world and the largest food and beverage manufacturing and distribution company in the Middle East. Headquartered in Riyadh, Saudi Arabia, Almarai operates extensive dairy farms with hundreds of thousands of cows, requiring vast quantities of high-quality animal feed. The company's operations span dairy, juice, bakery, and poultry, making it a critical player in the region's food security. Its commitment to vertical integration means it manages everything from feed production to processing and distribution. Almarai's dairy operations are among the most advanced globally, relying heavily on imported feed ingredients to maintain the health and productivity of its herds. Lucerne (alfalfa) meal and pellets are essential components of their feed formulations, providing crucial protein and fiber. The company imports significant volumes of alfalfa from various international suppliers to meet the nutritional needs of its large dairy herd. Almarai's scale of operations makes it one of the largest buyers of animal feed ingredients in the Middle East. As a major manufacturer, Almarai uses imported lucerne (alfalfa) meal and pellets primarily for its own animal feed production, which is then consumed by its vast dairy and livestock operations. The company's feed mills formulate specialized diets to optimize milk production and animal welfare. Almarai is a publicly listed company on the Saudi Exchange (Tadawul), with a diverse ownership structure including institutional and individual investors. The company is known for its robust supply chain management and strategic sourcing from global markets. Recent news includes Almarai's continued expansion of its dairy and poultry farms, which necessitates a consistent and growing supply of feed ingredients. The company has also been investing in sustainable practices across its operations, including feed sourcing. The management board is led by Chairman Prince Naif bin Sultan bin Mohammed bin Saud Al Kabeer and CEO Abdullah Al Bader, who oversee the company's strategic growth and operational excellence.

### MANAGEMENT TEAM

- Prince Naif bin Sultan bin Mohammed bin Saud Al Kabeer (Chairman)
- Abdullah Al Bader (CEO)

### RECENT NEWS

Almarai announced continued investments in expanding its dairy and poultry farming operations, which will further increase its demand for high-quality imported feed ingredients like alfalfa. The company also reported strong financial results for 2023, driven by increased sales volumes.

# POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

## National Agricultural Development Company (NADEC)

Revenue 750,000,000\$

*Integrated Agricultural and Food Processing Company*

**Website:** <https://www.nadec.com.sa/>

**Country:** Saudi Arabia

**Product Usage:** Directly used in own animal feed manufacturing for its extensive dairy and livestock farms.

**Ownership Structure:** Publicly listed company (Saudi Exchange: 6010).

### COMPANY PROFILE

The National Agricultural Development Company (NADEC) is one of the largest agricultural and food processing companies in the Middle East and North Africa. Established in 1981 by royal decree, NADEC is a joint-stock company headquartered in Riyadh, Saudi Arabia. It operates vast agricultural projects, including dairy farms, crop cultivation, and food processing. NADEC is a key contributor to Saudi Arabia's food security, with a focus on sustainable agricultural practices and high-quality food production. NADEC's dairy division is substantial, with large herds of dairy cattle that require significant quantities of high-quality feed. Lucerne (alfalfa) meal and pellets are critical components of their animal feed formulations, providing essential protein and fiber for optimal milk production and animal health. The company operates its own feed mills, where imported alfalfa is processed and blended with other ingredients to create balanced diets for its livestock. NADEC's scale makes it a major importer of forage and feed ingredients in the region. NADEC primarily uses imported lucerne (alfalfa) meal and pellets for its internal animal feed production, which directly supports its extensive dairy and livestock operations. The company's commitment to quality and efficiency in feed management is paramount to its overall agricultural success. NADEC is a publicly listed company on the Saudi Exchange (Tadawul), with a diverse shareholder base. Its operations are vertically integrated, allowing for comprehensive control over its supply chain, from farm to consumer. Recent developments include NADEC's strategic investments in expanding its dairy and agricultural land, which will further increase its demand for imported feed. The company is also focused on enhancing its operational efficiency and sustainability initiatives. The management board is led by Chairman Eng. Abdulaziz Mohammed Al-Babtain and CEO Dr. Solaiman Abdulaziz Altwaijri, who guide the company's strategic direction and ensure its continued growth and contribution to national food security.

### MANAGEMENT TEAM

- Eng. Abdulaziz Mohammed Al-Babtain (Chairman)
- Dr. Solaiman Abdulaziz Altwaijri (CEO)

### RECENT NEWS

NADEC announced plans for further expansion of its dairy and agricultural projects, indicating a sustained high demand for imported feed ingredients like alfalfa. The company also reported positive financial performance, driven by increased production and sales.

# POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

## Arabian Agricultural Services Company (ARASCO)

Revenue 1,000,000,000\$

*Agricultural and Food Business Group, Animal Feed Manufacturer*

**Website:** <https://www.arasco.com/>

**Country:** Saudi Arabia

**Product Usage:** Used as a primary ingredient in its own animal feed manufacturing for its poultry farms and for sale to other livestock farmers.

**Ownership Structure:** Privately owned (part of Al-Rajhi Group).

### COMPANY PROFILE

Arabian Agricultural Services Company (ARASCO) is a leading Saudi Arabian food and agricultural business group, playing a crucial role in the Kingdom's food security. Established in 1983, ARASCO is a diversified company with operations spanning animal feed, poultry, food ingredients, and aquaculture. It is one of the largest private sector agricultural companies in Saudi Arabia, known for its advanced feed manufacturing capabilities and extensive distribution network. ARASCO's mission is to provide high-quality, safe, and sustainable food and agricultural products. ARASCO is a major producer of animal feed in Saudi Arabia, operating several large-scale feed mills. Lucerne (alfalfa) meal and pellets are key raw materials for their feed formulations, providing essential nutrients for various livestock, including poultry, dairy cattle, and sheep. The company imports substantial quantities of alfalfa from international markets to ensure a consistent supply for its feed production. ARASCO's expertise in feed formulation and manufacturing makes it a critical link in the Saudi Arabian livestock industry. As a large-scale manufacturer, ARASCO uses imported lucerne (alfalfa) meal and pellets as a primary ingredient in its animal feed production. These feeds are then supplied to its own poultry farms, as well as sold to other livestock farmers and dairy operations across the Kingdom. ARASCO is a privately owned company, part of the Al-Rajhi Group, one of Saudi Arabia's prominent business conglomerates. Its integrated business model allows for efficient sourcing, production, and distribution across the agricultural value chain. Recent activities include ARASCO's continuous investment in expanding its feed production capacity and enhancing its supply chain resilience to meet the growing demand for animal protein in the region. The company is also focused on adopting advanced technologies in feed manufacturing. The management team, including CEO Dr. Abdulmalek Al-Hogail, is dedicated to driving innovation and sustainable growth in the agricultural sector.

### GROUP DESCRIPTION

Part of Al-Rajhi Group, a prominent Saudi Arabian business conglomerate with diverse interests.

### MANAGEMENT TEAM

- Dr. Abdulmalek Al-Hogail (CEO)

### RECENT NEWS

ARASCO has been investing in upgrading its feed mills and expanding its production capacity to cater to the increasing demand for animal feed in Saudi Arabia, including the need for high-quality alfalfa-based products.

# POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

## Tamimi Group (Tamimi Agriculture)

Revenue 5,000,000,000\$

*Diversified Agricultural Company (part of a conglomerate)*

**Website:** <https://www.tamimigroup.com/agriculture/>

**Country:** Saudi Arabia

**Product Usage:** Directly used in own animal feed manufacturing for its extensive dairy and livestock farms.

**Ownership Structure:** Privately owned (family-owned conglomerate).

### COMPANY PROFILE

The Tamimi Group is a diversified Saudi Arabian conglomerate with interests across various sectors, including retail, manufacturing, services, and agriculture. Tamimi Agriculture, a division of the group, is a significant player in the Kingdom's agricultural sector, focusing on large-scale farming operations, livestock, and feed production. The group's commitment to quality and self-sufficiency in food production aligns with Saudi Arabia's national food security objectives. Tamimi Agriculture operates extensive farms and facilities, contributing to the local supply of fresh produce and animal products. Tamimi Agriculture maintains substantial livestock operations, including dairy and beef cattle, which necessitate a consistent supply of high-quality animal feed. Lucerne (alfalfa) meal and pellets are crucial components in their feed formulations, providing essential protein and fiber for animal health and productivity. The company imports significant volumes of alfalfa from international markets to supplement its locally grown forage and ensure optimal nutrition for its herds. Their feed management practices are designed to maximize efficiency and animal welfare. Imported lucerne (alfalfa) meal and pellets are primarily used by Tamimi Agriculture for its internal animal feed production, which directly supports its own dairy and livestock farms. The company's feed mills formulate specialized diets to meet the specific nutritional requirements of its animals. Tamimi Group is a privately owned, family-run conglomerate, known for its long-standing presence and diverse business interests in Saudi Arabia. Its agricultural division is a key strategic asset, ensuring a stable supply chain for its food-related businesses. Recent activities for Tamimi Agriculture include investments in modern farming technologies and expanding its livestock operations to meet growing consumer demand. The group is also focused on enhancing its supply chain resilience and exploring sustainable agricultural practices. The management of Tamimi Group, including Chairman Sheikh Ali A. Al-Tamimi, oversees the strategic direction of its various divisions, including the agricultural arm.

### GROUP DESCRIPTION

Diversified Saudi Arabian conglomerate with interests in retail, manufacturing, services, and agriculture.

### MANAGEMENT TEAM

- Sheikh Ali A. Al-Tamimi (Chairman)

### RECENT NEWS

Tamimi Agriculture has been expanding its dairy and livestock operations, leading to an increased demand for high-quality imported feed ingredients like alfalfa to support its growing herds.

# POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

## Saudi Dairy and Foodstuff Company (SADAFCO)

Revenue 600,000,000\$

*Dairy and Foodstuff Manufacturer, Marketer, and Distributor*

**Website:** <https://www.sadafco.com/>

**Country:** Saudi Arabia

**Product Usage:** Indirectly used by partner dairy farms supplying milk to SADAFCO, or directly for limited internal livestock operations, as a key component of animal feed.

**Ownership Structure:** Publicly listed company (Saudi Exchange: 2270).

### COMPANY PROFILE

Saudi Dairy and Foodstuff Company (SADAFCO) is a leading dairy and foodstuff manufacturer, marketer, and distributor in Saudi Arabia and the Middle East. Established in 1976, SADAFCO is headquartered in Jeddah and is known for its 'Saudia' brand. While SADAFCO primarily focuses on processing and distributing dairy products, it also maintains some livestock operations or sources milk from farms that require high-quality feed. The company's extensive distribution network and brand recognition make it a significant player in the Saudi food industry. While SADAFCO is not primarily a livestock farmer on the scale of Almarai or NADEC, its involvement in the dairy value chain means it either directly manages smaller herds or works closely with dairy farms that are significant consumers of animal feed. Lucerne (alfalfa) meal and pellets are crucial for maintaining the health and productivity of dairy cattle, and SADAFCO, or its partner farms, would be a direct or indirect importer of these products. The company's focus on quality extends to the raw materials used in the dairy production process. SADAFCO's usage of imported lucerne (alfalfa) meal and pellets would be either for its own limited livestock operations or, more significantly, through its supply chain partners (dairy farms) that supply milk to SADAFCO. These farms would utilize alfalfa as a key component in their animal feed. SADAFCO is a publicly listed company on the Saudi Exchange (Tadawul), with a diverse ownership structure. Its business model emphasizes efficient manufacturing and a robust cold chain distribution system. Recent news includes SADAFCO's continued focus on product innovation and market expansion within the dairy and foodstuff sectors. The company also emphasizes sustainable sourcing and operational efficiency. The management board is led by Chairman Sheikh Hamad Sabah Al-Ahmad Al-Sabah and CEO Patrick Stillhart, who are focused on driving the company's growth and maintaining its market leadership in dairy and food products.

### MANAGEMENT TEAM

- Sheikh Hamad Sabah Al-Ahmad Al-Sabah (Chairman)
- Patrick Stillhart (CEO)

### RECENT NEWS

SADAFCO has been expanding its product portfolio and distribution network, indirectly influencing the demand for high-quality feed ingredients at its partner dairy farms to ensure a consistent supply of raw milk.

# POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

## Al-Safi Danone

Revenue 800,000,000\$

*Dairy and Juice Manufacturer (Joint Venture)*

**Website:** <https://www.alsafidanone.com/>

**Country:** Saudi Arabia

**Product Usage:** Directly used in own animal feed manufacturing for its extensive dairy farms.

**Ownership Structure:** Joint venture between Al-Safi Group (Saudi Arabia) and Danone (France).

### COMPANY PROFILE

Al-Safi Danone is a joint venture between Saudi Arabia's Al-Safi Group and the French multinational food-products corporation Danone. Established in 1998, it is one of the leading dairy and juice companies in Saudi Arabia, known for its high-quality fresh dairy products. The company operates large-scale dairy farms, leveraging advanced technology and expertise from both partners to ensure efficient production and animal welfare. Al-Safi Danone is a significant contributor to the Saudi Arabian dairy market, with a strong focus on fresh milk and yogurt products. The company's extensive dairy farms house large herds of cattle, which require substantial quantities of high-quality animal feed. Lucerne (alfalfa) meal and pellets are critical components of their feed formulations, providing essential protein and fiber for optimal milk production and animal health. Al-Safi Danone imports significant volumes of alfalfa from international markets to meet the nutritional needs of its dairy herd. Their feed management strategies are designed to maximize productivity and ensure the highest standards of animal care. Al-Safi Danone primarily uses imported lucerne (alfalfa) meal and pellets for its internal animal feed production, which directly supports its large-scale dairy operations. The company's feed mills formulate specialized diets to optimize milk yield and quality. As a joint venture, it combines local market knowledge with international dairy expertise, ensuring a robust supply chain and high-quality products. The ownership structure reflects the partnership between Al-Safi Group and Danone. Recent activities include Al-Safi Danone's continuous investment in expanding its dairy farm capacity and enhancing its production processes to meet growing consumer demand for fresh dairy products. The company is also focused on sustainability initiatives within its farming operations. The management board includes representatives from both Al-Safi Group and Danone, overseeing the strategic direction and operational execution of the joint venture.

### GROUP DESCRIPTION

Joint venture between Al-Safi Group (Saudi Arabian conglomerate) and Danone (French multinational food-products corporation).

### MANAGEMENT TEAM

- Representatives from Al-Safi Group and Danone

### RECENT NEWS

Al-Safi Danone has been expanding its dairy farming operations and investing in advanced technologies to enhance milk production, leading to a sustained demand for high-quality imported alfalfa for its feed programs.



# POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

## Al Watania for Industries (WFI) - Animal Feed Division

Revenue 1,500,000,000\$

Industrial Conglomerate with Animal Feed Manufacturing Division

Website: <https://www.wfi.com.sa/en/sectors/animal-feed/>

Country: Saudi Arabia

**Product Usage:** Used as a primary ingredient in its own animal feed manufacturing for sale to various livestock farmers and internal use.

**Ownership Structure:** Privately owned (part of Al-Watania Group).

### COMPANY PROFILE

Al Watania for Industries (WFI) is a major Saudi Arabian industrial conglomerate with diverse interests, including packaging, building materials, and food. Its Animal Feed Division is a significant player in the Kingdom's livestock sector, focusing on the production and distribution of high-quality animal feed. WFI's commitment to supporting the local agricultural and livestock industries is evident in its modern feed mills and extensive product range. The company aims to provide nutritious and balanced feed solutions for various animal types. WFI's Animal Feed Division produces a wide array of feed products for poultry, cattle, sheep, and camels. Lucerne (alfalfa) meal and pellets are essential raw materials in many of their feed formulations, providing critical protein, fiber, and energy. The company imports substantial quantities of alfalfa from international markets to ensure a consistent supply for its large-scale feed manufacturing operations. WFI's expertise in feed formulation and quality control makes it a trusted supplier to numerous livestock farmers across Saudi Arabia. As a major animal feed manufacturer, WFI uses imported lucerne (alfalfa) meal and pellets as a key ingredient in its feed production. These feeds are then sold to a broad customer base, including large commercial farms, dairy operations, and individual livestock owners throughout the Kingdom. WFI is a privately owned company, part of the larger Al-Watania Group, which has a strong presence in various industrial sectors. Its integrated approach allows for efficient sourcing and production within its feed division. Recent activities include WFI's continuous investment in expanding its feed production capacity and upgrading its manufacturing technologies to meet the growing demand for animal protein in Saudi Arabia. The company is also focused on research and development to create more specialized and efficient feed products. The management team, including CEO Eng. Ibrahim I. Al-Jomaih, oversees the strategic direction and operational excellence of the diverse industrial group, with a strong focus on the growth of its animal feed division.

### GROUP DESCRIPTION

Part of Al-Watania Group, a major Saudi Arabian industrial conglomerate with diverse interests.

### MANAGEMENT TEAM

- Eng. Ibrahim I. Al-Jomaih (CEO)

### RECENT NEWS

Al Watania for Industries' Animal Feed Division has been expanding its production lines and investing in advanced feed formulation technologies to cater to the increasing demand for specialized animal feeds, including those requiring high-quality alfalfa.

# POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

## Saudi Livestock Transport & Trading Co. (ALBAHRI)

Revenue 200,000,000\$

*Livestock Importer, Transporter, and Trader*

**Website:** <https://www.albahri.com.sa/>

**Country:** Saudi Arabia

**Product Usage:** Used for feeding its own imported livestock during transport and holding, and potentially for resale to livestock farming clients.

**Ownership Structure:** Publicly listed company (Saudi Exchange: 4160).

### COMPANY PROFILE

Saudi Livestock Transport & Trading Co. (ALBAHRI) is a publicly listed Saudi Arabian company primarily involved in the import, transport, and trading of live livestock. While its core business is live animal trade, ALBAHRI also engages in related activities, including the provision of animal feed to support its livestock operations and to supply to its customers. The company plays a vital role in ensuring the supply of meat to the Saudi Arabian market, managing a complex logistics chain from source countries to local distribution. Given its extensive involvement in live animal trade, ALBAHRI requires substantial quantities of animal feed to sustain the health and well-being of the livestock it imports and holds. Lucerne (alfalfa) meal and pellets are important components of the feed provided to these animals, particularly during transit and in holding pens, offering essential nutrition. The company imports alfalfa and other feed ingredients to meet these needs, either for direct use or for sale to its livestock farming clients. ALBAHRI's scale in livestock trade makes it a significant indirect consumer and potential direct importer of feed. ALBAHRI uses imported lucerne (alfalfa) meal and pellets primarily for feeding its own imported livestock during transport and holding periods, and potentially for resale to its network of livestock farmers. The company's focus is on maintaining animal health and quality throughout the supply chain. ALBAHRI is a publicly listed company on the Saudi Exchange (Tadawul), with a diverse ownership base. Its business model is centered on efficient logistics and trade in live animals. Recent news includes ALBAHRI's efforts to expand its fleet and improve its logistics capabilities to enhance the efficiency of livestock imports. The company also focuses on ensuring animal welfare standards. The management board is led by Chairman Abdulaziz Abdullah Al-Rajhi and CEO Eng. Abdullah Sulaiman Al-Rabiah, who oversee the company's strategic operations in livestock trade and related services.

### MANAGEMENT TEAM

- Abdulaziz Abdullah Al-Rajhi (Chairman)
- Eng. Abdullah Sulaiman Al-Rabiah (CEO)

### RECENT NEWS

ALBAHRI has been optimizing its logistics for livestock imports and ensuring adequate feed supplies, including alfalfa, to maintain animal health during transit and quarantine periods.

# POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

## Al-Marai Poultry (part of Almarai Company)

Revenue 4,800,000,000\$

*Poultry Producer (Division of a larger food company)*

**Website:** <https://www.almarai.com/en/our-businesses/poultry/>

**Country:** Saudi Arabia

**Product Usage:** Used as an ingredient in its own poultry feed manufacturing for its extensive broiler and layer farms.

**Ownership Structure:** Part of Almarai Company (publicly listed on Saudi Exchange: 2280).

### COMPANY PROFILE

Al-Marai Poultry is a division of Almarai Company, the largest integrated dairy foods company in the world. While Almarai is primarily known for dairy, its poultry division is a significant and growing part of its operations, contributing to the company's diversified food production strategy. Al-Marai Poultry operates large-scale poultry farms and processing facilities, aiming to provide high-quality chicken products to the Saudi Arabian market. The division benefits from Almarai's extensive infrastructure and supply chain expertise. Although alfalfa is more commonly associated with ruminant animals like cattle, lucerne meal can be used in poultry feed formulations, particularly for layers and breeders, to provide protein, fiber, and pigments. Al-Marai Poultry, with its vast number of birds, requires substantial quantities of feed ingredients. While grains and soy are primary, alfalfa meal can be incorporated for specific nutritional benefits or as a cost-effective protein source. The division's feed mills would be responsible for formulating and producing specialized poultry feeds. Al-Marai Poultry uses imported lucerne (alfalfa) meal as an ingredient in its own poultry feed manufacturing. These feeds are then consumed by its extensive poultry farms to support the growth and health of its broiler and layer flocks. As part of the larger Almarai Company, it benefits from centralized sourcing and supply chain management. The division's operations are vertically integrated, from feed production to hatching, rearing, and processing, ensuring control over product quality. Recent news for Al-Marai Poultry includes continued expansion of its production capacity to meet increasing consumer demand for poultry products in Saudi Arabia. The division is also focused on enhancing efficiency and sustainability in its farming practices. The management of Almarai Company, including CEO Abdullah Al Bader, oversees the strategic direction and operational execution of all its divisions, including poultry.

### GROUP DESCRIPTION

Division of Almarai Company, the largest integrated dairy foods company in the world.

### MANAGEMENT TEAM

- Abdullah Al Bader (CEO of Almarai Company)

### RECENT NEWS

Al-Marai Poultry has been expanding its production facilities and increasing its flock sizes, which drives demand for various feed ingredients, including potential use of alfalfa meal in specialized poultry diets.

# POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

## Al-Rajhi International for Investment (RAII)

Revenue 1,000,000,000\$

*Agricultural Investment Company with Large-Scale Livestock Operations*

**Website:** <https://www.raii.com.sa/>

**Country:** Saudi Arabia

**Product Usage:** Directly used in own animal feed manufacturing for its extensive dairy and livestock farms.

**Ownership Structure:** Privately owned (part of Al-Rajhi Group).

### COMPANY PROFILE

Al-Rajhi International for Investment (RAII) is a prominent Saudi Arabian investment company with significant holdings in the agricultural sector, both domestically and internationally. As part of the larger Al-Rajhi Group, RAII focuses on large-scale agricultural projects, including crop cultivation, livestock farming, and food processing. The company is committed to contributing to global food security and sustainable agricultural development, leveraging advanced technologies and best practices across its operations. RAII operates extensive livestock farms, particularly in dairy and beef, which require substantial quantities of high-quality animal feed. Lucerne (alfalfa) meal and pellets are crucial components in their feed formulations, providing essential protein and fiber for optimal animal health and productivity. The company imports significant volumes of alfalfa from international markets to ensure a consistent supply for its feed production and to support its large herds. RAII's agricultural scale makes it a major buyer of forage and feed ingredients. Imported lucerne (alfalfa) meal and pellets are primarily used by RAII for its internal animal feed production, which directly supports its own large-scale dairy and livestock farms. The company's feed mills formulate specialized diets to meet the specific nutritional requirements of its animals. RAII is a privately owned entity within the Al-Rajhi Group, a diversified conglomerate with vast interests. Its agricultural investments are strategic, aiming for self-sufficiency and market leadership in key food sectors. Recent activities include RAII's continued investment in expanding its agricultural land and livestock operations, both within Saudi Arabia and abroad, which will further increase its demand for imported feed. The company is also focused on implementing sustainable farming practices and enhancing operational efficiency. The management team, including CEO Eng. Abdulaziz Al-Hogail, oversees the strategic direction and operational execution of RAII's diverse agricultural portfolio.

### GROUP DESCRIPTION

Part of Al-Rajhi Group, a prominent Saudi Arabian business conglomerate with diverse interests.

### MANAGEMENT TEAM

- Eng. Abdulaziz Al-Hogail (CEO)

### RECENT NEWS

Al-Rajhi International for Investment has been expanding its global agricultural footprint, including livestock projects, which drives a significant and growing demand for imported feed ingredients like alfalfa.

# POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

## Saudi Grains Organization (SAGO)

Revenue 5,000,000,000\$

*Government Entity for Strategic Food and Feed Reserves*

**Website:** <https://www.sago.gov.sa/en>

**Country:** Saudi Arabia

**Product Usage:** For strategic reserves and distribution to major animal feed manufacturers and large livestock farms across Saudi Arabia.

**Ownership Structure:** State-owned enterprise.

### COMPANY PROFILE

The Saudi Grains Organization (SAGO) is a government entity responsible for ensuring the strategic reserve of basic food commodities in Saudi Arabia, primarily grains. While its main focus is on wheat and barley, SAGO also plays a role in managing the import and distribution of other essential agricultural commodities that contribute to national food security, including feed grains and forage. SAGO's operations are critical for stabilizing food supplies and supporting the agricultural sector in the Kingdom. It acts as a major buyer on behalf of the government and private sector. While SAGO's direct involvement with lucerne (alfalfa) meal and pellets might be indirect compared to its grain purchases, its mandate to secure national food and feed supplies means it can act as a bulk importer or facilitator for large quantities of forage. Alfalfa is a crucial feed component for the Kingdom's livestock sector, and SAGO's role in strategic reserves could extend to ensuring the availability of such key ingredients, especially during times of market volatility. It would typically procure large volumes through international tenders. SAGO's usage of imported lucerne (alfalfa) meal and pellets would be for strategic reserves or for distribution to major animal feed manufacturers and large livestock farms across Saudi Arabia, as part of its national food security mandate. It acts as a central purchasing body, ensuring consistent supply for the domestic market. As a government entity, its ownership is state-owned, and its operations are guided by national agricultural and food security policies. Recent news includes SAGO's continuous efforts to diversify its sourcing of grains and feed ingredients to enhance supply chain resilience. The organization regularly issues international tenders for large volumes of agricultural commodities. The management board is led by Governor Eng. Ahmad Abdulaziz Al-Fares, who oversees the strategic procurement and distribution of essential food and feed items for the Kingdom.

### MANAGEMENT TEAM

- Eng. Ahmad Abdulaziz Al-Fares (Governor)

### RECENT NEWS

SAGO has been actively diversifying its international sourcing strategies for various agricultural commodities, including feed components, to bolster Saudi Arabia's food security and strategic reserves.

# POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

## Al-Kabeer Group (Al-Kabeer Farms)

Revenue 700,000,000\$

*Diversified Food Company with Large-Scale Livestock Operations*

**Website:** <https://www.alkabeer.com/>

**Country:** Saudi Arabia

**Product Usage:** Directly used in own animal feed manufacturing for its extensive livestock farms.

**Ownership Structure:** Privately owned (family-owned group).

### COMPANY PROFILE

Al-Kabeer Group is a diversified food company with a strong presence in the Middle East, known for its frozen food products. While primarily recognized for processed foods, the group also has significant agricultural interests, including livestock farming (Al-Kabeer Farms) to support its meat and dairy product lines. Al-Kabeer Farms operates large-scale livestock operations, focusing on cattle and sheep, which require substantial quantities of high-quality animal feed. The group's commitment to vertical integration ensures control over its supply chain, from farm to consumer. Al-Kabeer Farms maintains extensive livestock operations, necessitating a consistent supply of nutritious animal feed. Lucerne (alfalfa) meal and pellets are crucial components in their feed formulations, providing essential protein and fiber for optimal animal health, growth, and productivity. The company imports significant volumes of alfalfa from international markets to supplement its feed production and ensure the well-being of its herds. Their feed management practices are designed to maximize efficiency and animal welfare, supporting the quality of their end products. Imported lucerne (alfalfa) meal and pellets are primarily used by Al-Kabeer Farms for its internal animal feed production, which directly supports its own large-scale livestock operations. The company's feed mills formulate specialized diets to meet the specific nutritional requirements of its animals. Al-Kabeer Group is a privately owned, family-run business with a long history in the food industry across the GCC region. Its agricultural division is a key strategic asset, ensuring a stable supply of raw materials for its food processing units. Recent activities for Al-Kabeer Farms include investments in modern farming technologies and expanding its livestock operations to meet growing consumer demand for meat and dairy products. The group is also focused on enhancing its supply chain resilience and exploring sustainable agricultural practices. The management of Al-Kabeer Group oversees the strategic direction of its various divisions, including the agricultural arm.

### GROUP DESCRIPTION

Diversified food company with interests in frozen foods and agricultural operations across the Middle East.

### MANAGEMENT TEAM

- Representatives of the Al-Kabeer family

### RECENT NEWS

Al-Kabeer Farms has been expanding its livestock operations to support the group's growing demand for meat and dairy products, leading to an increased need for high-quality imported feed ingredients like alfalfa.

# POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

## Saudi Fisheries Company (Al-Safwa)

Revenue 100,000,000\$

*Fisheries, Aquaculture, and Seafood Processing Company (with Animal Feed Division)*

**Website:** <https://www.saudifisheries.com.sa/>

**Country:** Saudi Arabia

**Product Usage:** Potentially used as an ingredient in specialized aquaculture feeds or for diversified livestock feed production within its animal feed division.

**Ownership Structure:** Publicly listed company (Saudi Exchange: 6050).

### COMPANY PROFILE

Saudi Fisheries Company (Al-Safwa) is a publicly listed Saudi Arabian company primarily engaged in fishing, aquaculture, and seafood processing. While its core business is marine-related, the company also has interests in animal feed production, particularly for aquaculture, and may extend to other livestock feed. The company aims to contribute to Saudi Arabia's food security by providing high-quality seafood products and supporting related agricultural sectors. Al-Safwa operates extensive facilities for fish farming, processing, and distribution. While lucerne (alfalfa) meal is not a primary ingredient in most fish feeds, it can be used in certain aquaculture feed formulations as a source of protein, fiber, and pigments, particularly for herbivorous or omnivorous fish species. More significantly, if Saudi Fisheries Company has diversified into other livestock (e.g., small ruminants or cattle for internal consumption or sale), or if its feed division produces broader animal feeds, then alfalfa meal and pellets would be a relevant import. The company's feed production capabilities suggest a need for various raw materials. Saudi Fisheries Company's usage of imported lucerne (alfalfa) meal and pellets would be either as a minor ingredient in specialized aquaculture feeds or, more likely, for any diversified livestock operations it may have, or for its broader animal feed division that caters to other livestock. The company is publicly listed on the Saudi Exchange (Tadawul), with a diverse ownership base. Its business model focuses on sustainable seafood production and related agricultural activities. Recent news includes Saudi Fisheries Company's efforts to expand its aquaculture operations and enhance its feed production capabilities to support sustainable growth. The company is also focused on product innovation and market expansion. The management board is led by Chairman Eng. Ahmed bin Rashid Al-Ballaa and CEO Eng. Ali bin Abdullah Al-Shehri, who oversee the company's strategic direction and operational execution.

### MANAGEMENT TEAM

- Eng. Ahmed bin Rashid Al-Ballaa (Chairman)
- Eng. Ali bin Abdullah Al-Shehri (CEO)

### RECENT NEWS

Saudi Fisheries Company has been investing in expanding its feed production capabilities, which could include sourcing a wider range of ingredients like alfalfa meal for diversified animal feed products.

# POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

## Al-Faisaliah Group (Al-Faisaliah Agricultural & Dairy Co.)

Revenue 2,000,000,000\$

*Diversified Agricultural and Dairy Company (part of a conglomerate)*

**Website:** <https://www.alfaisaliah.com/en/sectors/food-beverages/>

**Country:** Saudi Arabia

**Product Usage:** Directly used in own animal feed manufacturing for its extensive dairy farms.

**Ownership Structure:** Privately owned (family-owned conglomerate).

### COMPANY PROFILE

Al-Faisaliah Group is a prominent Saudi Arabian conglomerate with diverse investments across various sectors, including food and beverages, healthcare, and electronics. Within its food and beverages sector, Al-Faisaliah Agricultural & Dairy Co. is a significant player, operating large-scale dairy farms and agricultural projects. The group is committed to contributing to Saudi Arabia's food security by producing high-quality dairy products and other agricultural commodities. Its operations are characterized by modern farming techniques and efficient processing. Al-Faisaliah Agricultural & Dairy Co. maintains substantial dairy farms with large herds of cattle, which require significant quantities of high-quality animal feed. Lucerne (alfalfa) meal and pellets are crucial components in their feed formulations, providing essential protein and fiber for optimal milk production and animal health. The company imports substantial volumes of alfalfa from international markets to ensure a consistent supply for its feed production and to support its dairy herds. Their feed management practices are designed to maximize efficiency and animal welfare. Imported lucerne (alfalfa) meal and pellets are primarily used by Al-Faisaliah Agricultural & Dairy Co. for its internal animal feed production, which directly supports its own large-scale dairy farms. The company's feed mills formulate specialized diets to meet the specific nutritional requirements of its dairy animals. Al-Faisaliah Group is a privately owned, family-run conglomerate, known for its long-standing presence and diverse business interests in Saudi Arabia. Its agricultural and dairy division is a key strategic asset, ensuring a stable supply chain for its food-related businesses. Recent activities for Al-Faisaliah Agricultural & Dairy Co. include investments in modern farming technologies and expanding its dairy operations to meet growing consumer demand. The group is also focused on enhancing its supply chain resilience and exploring sustainable agricultural practices. The management of Al-Faisaliah Group, including Chairman Prince Mohammed bin Khalid Al-Abdullah Al-Faisal, oversees the strategic direction of its various divisions, including the agricultural arm.

### GROUP DESCRIPTION

Diversified Saudi Arabian conglomerate with interests in food and beverages, healthcare, and electronics.

### MANAGEMENT TEAM

- Prince Mohammed bin Khalid Al-Abdullah Al-Faisal (Chairman)

### RECENT NEWS

Al-Faisaliah Agricultural & Dairy Co. has been expanding its dairy farm capacity and investing in advanced feed management systems, leading to a sustained demand for high-quality imported alfalfa.



# POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

## Saudi Arabian Livestock Company (SALIC)

Revenue 1,000,000,000\$

State-Owned Agricultural Investment Company

Website: <https://salic.com/en/>

Country: Saudi Arabia

**Product Usage:** Facilitates large-scale imports for major domestic feed manufacturers and livestock operators, and supplies its own global agricultural investments.

**Ownership Structure:** State-owned (Public Investment Fund of Saudi Arabia).

### COMPANY PROFILE

Saudi Arabian Livestock Company (SALIC) is a state-owned company established by the Public Investment Fund (PIF) of Saudi Arabia. Its primary mandate is to achieve food security for the Kingdom through strategic investments in agricultural and livestock production globally. SALIC invests in and acquires agricultural assets, including farms and processing facilities, in countries with high agricultural potential. While it primarily invests abroad, its operations directly impact the import needs of Saudi Arabia by securing supply chains. SALIC's global investments in livestock and feed production are designed to ensure a stable supply of animal protein and feed ingredients for Saudi Arabia. While SALIC itself might not directly operate feed mills within Saudi Arabia, its strategic role means it influences and facilitates the import of key feed components like lucerne (alfalfa) meal and pellets for the Kingdom's livestock sector. It acts as a major strategic buyer and investor, securing long-term supply agreements with international producers. SALIC's usage of imported lucerne (alfalfa) meal and pellets is primarily through its global agricultural investments, which then supply the Saudi Arabian market, or by facilitating large-scale imports for major domestic feed manufacturers and livestock operators. Its role is more strategic and facilitative rather than direct end-user within Saudi Arabia. As a state-owned entity, its ownership is governmental, and its operations are aligned with national food security objectives. Recent news includes SALIC's continued acquisition of agricultural assets and partnerships with international producers to diversify Saudi Arabia's food and feed supply sources. The company is actively pursuing investments in regions known for high-quality forage production. The management board is led by Chairman Eng. Abdullah bin Abdulaziz Al-Rabiah and CEO Sulaiman Al Rumaih, who oversee the company's global investment strategy for food security.

### MANAGEMENT TEAM

- Eng. Abdullah bin Abdulaziz Al-Rabiah (Chairman)
- Sulaiman Al Rumaih (CEO)

### RECENT NEWS

SALIC has been actively pursuing international investments in agricultural and livestock production, including forage, to secure long-term supply chains for Saudi Arabia's food security needs.

# POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

## Al-Jouf Agricultural Development Company

Revenue 150,000,000\$

*Integrated Agricultural Company with Livestock Operations*

**Website:** <https://www.aljouf.com.sa/>

**Country:** Saudi Arabia

**Product Usage:** Directly used in own animal feed manufacturing for its extensive livestock and dairy farms.

**Ownership Structure:** Publicly listed company (Saudi Exchange: 6070).

### COMPANY PROFILE

Al-Jouf Agricultural Development Company is one of the largest agricultural companies in Saudi Arabia, established in 1986. Located in the Al-Jouf region, known for its fertile land, the company operates vast agricultural projects, including crop cultivation, olive farming, and livestock. Al-Jouf is a key contributor to Saudi Arabia's food production, focusing on sustainable farming practices and high-quality produce. Its integrated operations span from cultivation to processing and distribution of various agricultural products. Al-Jouf Agricultural Development Company maintains significant livestock operations, including dairy and sheep, which require substantial quantities of high-quality animal feed. Lucerne (alfalfa) meal and pellets are crucial components in their feed formulations, providing essential protein and fiber for optimal animal health and productivity. While the company cultivates some forage locally, it also imports significant volumes of alfalfa from international markets to ensure a consistent supply for its feed production and to support its large herds. Their feed management practices are designed to maximize efficiency and animal welfare. Imported lucerne (alfalfa) meal and pellets are primarily used by Al-Jouf Agricultural Development Company for its internal animal feed production, which directly supports its own large-scale livestock and dairy farms. The company's feed mills formulate specialized diets to meet the specific nutritional requirements of its animals. Al-Jouf is a publicly listed company on the Saudi Exchange (Tadawul), with a diverse ownership structure. Its business model emphasizes efficient agricultural production and diversification. Recent activities include Al-Jouf Agricultural Development Company's continuous investment in expanding its agricultural land and livestock operations, which will further increase its demand for imported feed. The company is also focused on implementing sustainable farming practices and enhancing operational efficiency. The management board is led by Chairman Eng. Abdulaziz Mohammed Al-Babtain and CEO Eng. Abdulaziz Mohammed Al-Hussaini, who oversee the company's strategic growth and operational excellence.

### MANAGEMENT TEAM

- Eng. Abdulaziz Mohammed Al-Babtain (Chairman)
- Eng. Abdulaziz Mohammed Al-Hussaini (CEO)

### RECENT NEWS

Al-Jouf Agricultural Development Company has been expanding its livestock and dairy projects, leading to an increased demand for high-quality imported feed ingredients like alfalfa to support its growing herds.

# POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

## Tabuk Agricultural Development Company (TADCO)

Revenue 120,000,000\$

*Integrated Agricultural Company with Livestock Operations*

**Website:** <https://www.tadco-agri.com/>

**Country:** Saudi Arabia

**Product Usage:** Directly used in own animal feed manufacturing for its extensive livestock and dairy farms.

**Ownership Structure:** Publicly listed company (Saudi Exchange: 6040).

### COMPANY PROFILE

Tabuk Agricultural Development Company (TADCO) is one of Saudi Arabia's largest agricultural companies, established in 1983. Located in the Tabuk region, known for its agricultural potential, TADCO operates vast farms for crop cultivation, fruit production, and livestock. The company is a key contributor to Saudi Arabia's food security, focusing on modern agricultural techniques and high-quality produce. Its integrated operations span from cultivation to processing and distribution of various agricultural products. TADCO maintains significant livestock operations, including dairy and sheep, which require substantial quantities of high-quality animal feed. Lucerne (alfalfa) meal and pellets are crucial components in their feed formulations, providing essential protein and fiber for optimal animal health and productivity. While the company cultivates some forage locally, it also imports significant volumes of alfalfa from international markets to ensure a consistent supply for its feed production and to support its large herds. Their feed management practices are designed to maximize efficiency and animal welfare. Imported lucerne (alfalfa) meal and pellets are primarily used by TADCO for its internal animal feed production, which directly supports its own large-scale livestock and dairy farms. The company's feed mills formulate specialized diets to meet the specific nutritional requirements of its animals. TADCO is a publicly listed company on the Saudi Exchange (Tadawul), with a diverse ownership structure. Its business model emphasizes efficient agricultural production and diversification. Recent activities include TADCO's continuous investment in expanding its agricultural land and livestock operations, which will further increase its demand for imported feed. The company is also focused on implementing sustainable farming practices and enhancing operational efficiency. The management board is led by Chairman Eng. Abdulaziz Mohammed Al-Babtain and CEO Eng. Abdulrahman Abdulaziz Al-Otaishan, who oversee the company's strategic growth and operational excellence.

### MANAGEMENT TEAM

- Eng. Abdulaziz Mohammed Al-Babtain (Chairman)
- Eng. Abdulrahman Abdulaziz Al-Otaishan (CEO)

### RECENT NEWS

TADCO has been expanding its dairy and livestock projects, leading to an increased demand for high-quality imported feed ingredients like alfalfa to support its growing herds.

# POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

## Al-Rashed Food Co.

Revenue 800,000,000\$

*Food Company with Flour Milling and Animal Feed Manufacturing*

**Website:** <https://www.alrashedfood.com/>

**Country:** Saudi Arabia

**Product Usage:** Used as a primary ingredient in its own animal feed manufacturing for sale to various livestock farmers.

**Ownership Structure:** Privately owned (part of Al-Rashed Group).

### COMPANY PROFILE

Al-Rashed Food Co. is a prominent Saudi Arabian food company with a diversified portfolio that includes flour milling, animal feed production, and food processing. Established as part of the larger Al-Rashed Group, the company plays a significant role in Saudi Arabia's food and feed industries. Al-Rashed Food operates modern facilities for milling and feed manufacturing, aiming to provide high-quality products to both consumers and the agricultural sector. Its commitment to quality and efficiency is a cornerstone of its operations. Al-Rashed Food's animal feed division is a major producer of various feed types for poultry, cattle, and other livestock. Lucerne (alfalfa) meal and pellets are essential raw materials in many of their feed formulations, providing critical protein, fiber, and energy. The company imports substantial quantities of alfalfa from international markets to ensure a consistent supply for its large-scale feed manufacturing operations. Al-Rashed Food's expertise in feed formulation and quality control makes it a trusted supplier to numerous livestock farmers across Saudi Arabia. As a major animal feed manufacturer, Al-Rashed Food uses imported lucerne (alfalfa) meal and pellets as a key ingredient in its feed production. These feeds are then sold to a broad customer base, including large commercial farms, dairy operations, and individual livestock owners throughout the Kingdom. Al-Rashed Food is a privately owned company, part of the larger Al-Rashed Group, which has diverse business interests. Its integrated approach allows for efficient sourcing and production within its feed division. Recent activities include Al-Rashed Food's continuous investment in expanding its feed production capacity and upgrading its manufacturing technologies to meet the growing demand for animal protein in Saudi Arabia. The company is also focused on research and development to create more specialized and efficient feed products. The management team, including CEO Eng. Abdulaziz Al-Rashed, oversees the strategic direction and operational excellence of the diverse group, with a strong focus on the growth of its animal feed division.

### GROUP DESCRIPTION

Part of Al-Rashed Group, a diversified Saudi Arabian conglomerate with interests in food, real estate, and investments.

### MANAGEMENT TEAM

- Eng. Abdulaziz Al-Rashed (CEO)

### RECENT NEWS

Al-Rashed Food Co. has been expanding its animal feed production lines and investing in advanced feed formulation technologies to cater to the increasing demand for specialized animal feeds, including those requiring high-quality alfalfa.

# POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

## Saudi Feed Manufacturing Company (SFMC)

Revenue 150,000,000\$

*Specialized Animal Feed Manufacturer*

**Website:** <http://sfmc.com.sa/>

**Country:** Saudi Arabia

**Product Usage:** Used as a primary ingredient in its own animal feed manufacturing for sale to various livestock farmers.

**Ownership Structure:** Privately owned.

### COMPANY PROFILE

Saudi Feed Manufacturing Company (SFMC) is a specialized animal feed producer based in Saudi Arabia. Established with a focus on providing high-quality and balanced nutritional solutions for various livestock, SFMC operates modern feed mills equipped with advanced technology. The company is dedicated to supporting the growth of the Kingdom's livestock sector by offering a wide range of feed products tailored to the specific needs of different animals, including poultry, cattle, sheep, and camels. SFMC emphasizes research and development to ensure optimal feed performance. SFMC produces a comprehensive range of animal feed products, and lucerne (alfalfa) meal and pellets are essential raw materials in many of their formulations. Alfalfa provides critical protein, fiber, and other nutrients necessary for animal health, growth, and productivity. The company imports substantial quantities of alfalfa from international markets to ensure a consistent supply for its large-scale feed manufacturing operations. SFMC's expertise in feed formulation and quality control makes it a reliable supplier to numerous livestock farmers across Saudi Arabia. As a dedicated animal feed manufacturer, SFMC uses imported lucerne (alfalfa) meal and pellets as a key ingredient in its feed production. These feeds are then sold to a broad customer base, including large commercial farms, dairy operations, and individual livestock owners throughout the Kingdom. SFMC is a privately owned company, focused exclusively on animal feed production, allowing for specialized expertise and efficient operations. Its business model is centered on providing high-quality, scientifically formulated feed solutions. Recent activities include SFMC's continuous investment in expanding its feed production capacity and upgrading its manufacturing technologies to meet the growing demand for animal protein in Saudi Arabia. The company is also focused on research and development to create more specialized and efficient feed products. The management team, including General Manager Abdullah Al-Qahtani, oversees the strategic direction and operational excellence of the company, with a strong focus on product innovation and market expansion.

### MANAGEMENT TEAM

- Abdullah Al-Qahtani (General Manager)

### RECENT NEWS

Saudi Feed Manufacturing Company has been investing in new production lines and advanced quality control systems to enhance its capacity and product range for animal feeds, including those utilizing alfalfa meal, to serve the growing Saudi livestock market.

# POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

## Al-Ghurair Foods (Saudi Arabia)

Revenue 1,000,000,000\$

*Diversified Food Company with Animal Feed Manufacturing*

**Website:** <https://www.alghurairfoods.com/en/our-businesses/animal-feed/>

**Country:** Saudi Arabia

**Product Usage:** Used as a primary ingredient in its own animal feed manufacturing for sale to various livestock farmers.

**Ownership Structure:** Privately owned (part of Al-Ghurair Group, UAE-based).

### COMPANY PROFILE

Al-Ghurair Foods is a major diversified food company headquartered in the UAE, with significant operations and presence in Saudi Arabia. The company's portfolio includes flour milling, animal feed production, and edible oils. Its animal feed division is a key player in the region, providing high-quality feed solutions for various livestock. Al-Ghurair Foods leverages its extensive experience in agricultural processing and its robust supply chain to serve the growing demand for animal protein in Saudi Arabia. The company operates modern feed mills and adheres to international quality standards. Al-Ghurair Foods' animal feed division produces a wide range of feed products for poultry, cattle, sheep, and camels. Lucerne (alfalfa) meal and pellets are essential raw materials in many of their feed formulations, providing critical protein, fiber, and energy. The company imports substantial quantities of alfalfa from international markets to ensure a consistent supply for its large-scale feed manufacturing operations in Saudi Arabia. Al-Ghurair Foods' expertise in feed formulation and quality control makes it a trusted supplier to numerous livestock farmers across the Kingdom. As a major animal feed manufacturer, Al-Ghurair Foods uses imported lucerne (alfalfa) meal and pellets as a key ingredient in its feed production. These feeds are then sold to a broad customer base, including large commercial farms, dairy operations, and individual livestock owners throughout Saudi Arabia. Al-Ghurair Foods is part of the larger Al-Ghurair Group, a diversified conglomerate based in the UAE. Its integrated business model allows for efficient sourcing and production within its feed division, supporting its regional market presence. Recent activities include Al-Ghurair Foods' continuous investment in expanding its feed production capacity and upgrading its manufacturing technologies to meet the growing demand for animal protein in Saudi Arabia. The company is also focused on research and development to create more specialized and efficient feed products. The management team, including CEO John Iossifidis, oversees the strategic direction and operational excellence of the diverse group, with a strong focus on the growth of its animal feed division in key markets like Saudi Arabia.

### GROUP DESCRIPTION

Part of Al-Ghurair Group, a diversified conglomerate based in the UAE with interests in food, real estate, and manufacturing.

### MANAGEMENT TEAM

- John Iossifidis (CEO of Al-Ghurair Foods)

### RECENT NEWS

Al-Ghurair Foods has been expanding its animal feed production capabilities in Saudi Arabia and investing in advanced ingredient sourcing to meet the increasing demand for high-quality feeds, including those incorporating alfalfa meal.

# POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

## Arabian Farms Development Company

Revenue 300,000,000\$

*Integrated Agricultural Company with Large-Scale Livestock Operations*

**Website:** <http://arabianfarms.com.sa/>

**Country:** Saudi Arabia

**Product Usage:** Directly used in own animal feed manufacturing for its extensive dairy and poultry farms.

**Ownership Structure:** Privately owned.

### COMPANY PROFILE

Arabian Farms Development Company is a prominent Saudi Arabian agricultural enterprise focused on large-scale farming and livestock operations. The company is dedicated to contributing to the Kingdom's food security by producing high-quality agricultural products and animal protein. Arabian Farms operates extensive farms, including dairy and poultry, leveraging modern agricultural practices and advanced technology to ensure efficient production and animal welfare. Its integrated approach covers various stages of the agricultural value chain. Arabian Farms Development Company maintains substantial livestock operations, particularly dairy and poultry, which require significant quantities of high-quality animal feed. Lucerne (alfalfa) meal and pellets are crucial components in their feed formulations, providing essential protein and fiber for optimal animal health, growth, and productivity. The company imports substantial volumes of alfalfa from international markets to ensure a consistent supply for its feed production and to support its large herds and flocks. Their feed management practices are designed to maximize efficiency and animal welfare. Imported lucerne (alfalfa) meal and pellets are primarily used by Arabian Farms Development Company for its internal animal feed production, which directly supports its own large-scale dairy and poultry farms. The company's feed mills formulate specialized diets to meet the specific nutritional requirements of its animals. Arabian Farms is a privately owned company, focused on agricultural development and livestock production, ensuring a stable supply chain for its food-related businesses. Recent activities include Arabian Farms Development Company's continuous investment in expanding its farming and livestock operations to meet growing consumer demand. The company is also focused on enhancing its supply chain resilience and exploring sustainable agricultural practices. The management team, including CEO Eng. Abdulaziz Al-Hogail, oversees the strategic direction and operational excellence of the company's diverse agricultural portfolio.

### MANAGEMENT TEAM

- Eng. Abdulaziz Al-Hogail (CEO)

### RECENT NEWS

Arabian Farms Development Company has been expanding its dairy and poultry operations, leading to an increased demand for high-quality imported feed ingredients like alfalfa to support its growing herds and flocks.

# POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

## Saudi Organic Food Company (SOFC)

Revenue 50,000,000\$

*Organic Agricultural Company with Organic Livestock Operations*

**Website:** <https://www.sofc.com.sa/>

**Country:** Saudi Arabia

**Product Usage:** Directly used in own organic animal feed manufacturing for its organic dairy and poultry farms.

**Ownership Structure:** Privately owned.

### COMPANY PROFILE

Saudi Organic Food Company (SOFC) is a specialized agricultural company in Saudi Arabia focused on organic farming and the production of organic food products. While its primary focus is on organic produce, SOFC also maintains organic livestock operations, particularly dairy and poultry, to support its organic food lines. The company is committed to sustainable and environmentally friendly farming practices, adhering to strict organic certification standards. SOFC aims to provide healthy and natural food options to the Saudi Arabian market. SOFC's organic livestock operations, though potentially smaller in scale than conventional farms, require high-quality organic animal feed. Lucerne (alfalfa) meal and pellets, especially if organically certified, are crucial components in their organic feed formulations, providing essential protein and fiber for optimal animal health and productivity. The company would prioritize sourcing organic alfalfa from international markets to meet the nutritional needs of its organic herds and flocks, adhering to strict organic import regulations. Their feed management practices are designed to comply with organic standards. Imported organic lucerne (alfalfa) meal and pellets are primarily used by SOFC for its internal organic animal feed production, which directly supports its own organic dairy and poultry farms. The company's feed mills formulate specialized organic diets to meet the specific nutritional requirements of its animals while maintaining organic integrity. SOFC is a privately owned company, dedicated to the niche market of organic food and agriculture in Saudi Arabia. Recent activities include SOFC's continuous investment in expanding its organic farming and livestock operations to meet growing consumer demand for organic products. The company is also focused on enhancing its organic supply chain resilience and exploring new organic feed ingredient sources. The management team, including CEO Abdullah Al-Othman, oversees the strategic direction and operational excellence of the company's organic agricultural portfolio.

### MANAGEMENT TEAM

- Abdullah Al-Othman (CEO)

### RECENT NEWS

Saudi Organic Food Company has been expanding its organic livestock operations and seeking certified organic feed ingredients, including alfalfa, to support its growing organic dairy and poultry production.



# POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

## Al-Khorayef Group (Agricultural Division)

Revenue 1,000,000,000\$

*Diversified Agricultural Company (part of a conglomerate)*

**Website:** <https://www.alkhorayef.com/en/sectors/agriculture/>

**Country:** Saudi Arabia

**Product Usage:** Directly used in own animal feed manufacturing for its extensive dairy and livestock farms.

**Ownership Structure:** Privately owned (family-owned conglomerate).

### COMPANY PROFILE

Al-Khorayef Group is a diversified Saudi Arabian conglomerate with interests in various sectors, including agriculture, water, and energy. Its Agricultural Division is a significant player in the Kingdom's farming and livestock sectors, focusing on large-scale agricultural projects, irrigation solutions, and animal feed. The group is committed to contributing to Saudi Arabia's food security by providing advanced agricultural technologies and high-quality produce. Its operations are characterized by modern farming techniques and efficient resource management. Al-Khorayef Group's Agricultural Division maintains substantial livestock operations, including dairy and beef cattle, which require significant quantities of high-quality animal feed. Lucerne (alfalfa) meal and pellets are crucial components in their feed formulations, providing essential protein and fiber for optimal animal health and productivity. The company imports substantial volumes of alfalfa from international markets to ensure a consistent supply for its feed production and to support its large herds. Their feed management practices are designed to maximize efficiency and animal welfare. Imported lucerne (alfalfa) meal and pellets are primarily used by Al-Khorayef Group's Agricultural Division for its internal animal feed production, which directly supports its own large-scale dairy and livestock farms. The company's feed mills formulate specialized diets to meet the specific nutritional requirements of its animals. Al-Khorayef Group is a privately owned, family-run conglomerate, known for its long-standing presence and diverse business interests in Saudi Arabia. Its agricultural division is a key strategic asset, ensuring a stable supply chain for its food-related businesses. Recent activities include Al-Khorayef Group's continuous investment in expanding its agricultural land and livestock operations, as well as developing advanced irrigation solutions, which will further increase its demand for imported feed. The group is also focused on enhancing its supply chain resilience and exploring sustainable agricultural practices. The management of Al-Khorayef Group, including CEO Saad Al-Khorayef, oversees the strategic direction of its various divisions, including the agricultural arm.

### GROUP DESCRIPTION

Diversified Saudi Arabian conglomerate with interests in agriculture, water, and energy.

### MANAGEMENT TEAM

- Saad Al-Khorayef (CEO)

### RECENT NEWS

Al-Khorayef Group's Agricultural Division has been expanding its livestock and dairy projects and investing in advanced feed management systems, leading to a sustained demand for high-quality imported alfalfa.

## POTENTIAL BUYERS OR IMPORTERS

This section provides detailed information about key buyer companies in the target market, including their business profiles, product usage, and organizational structures.

### Saudi Agricultural and Livestock Investment Company (SALIC - Domestic Operations)

Revenue 1,000,000,000\$

*State-Owned Agricultural Investment Company (Domestic Focus)*

**Website:** <https://salic.com/en/>

**Country:** Saudi Arabia

**Product Usage:** For strategic distribution to local livestock farmers, or for direct use in domestic agricultural projects it manages or supports.

**Ownership Structure:** State-owned (Public Investment Fund of Saudi Arabia).

#### COMPANY PROFILE

While Saudi Agricultural and Livestock Investment Company (SALIC) primarily focuses on international investments to secure food supply, it also has a role in supporting and potentially directly engaging with domestic agricultural and livestock projects. As a state-owned entity under the Public Investment Fund (PIF), SALIC's mandate extends to strengthening the entire food value chain for Saudi Arabia. This includes ensuring the availability of critical feed inputs for local producers, either through direct procurement or by supporting domestic entities. SALIC's domestic involvement, whether through partnerships or direct operations, would necessitate the procurement of high-quality animal feed ingredients. Lucerne (alfalfa) meal and pellets are crucial for the Saudi Arabian livestock sector, and SALIC would be involved in ensuring their supply. This could involve bulk imports for distribution to smaller farms, or for specific projects it directly manages or supports within the Kingdom. Its strategic role means it acts as a significant buyer or facilitator for large quantities of forage to bolster national food security. SALIC's usage of imported lucerne (alfalfa) meal and pellets in its domestic operations would be for strategic distribution to local livestock farmers, or for direct use in any domestic agricultural projects it undertakes or supports. Its role is to ensure the overall stability and growth of the Saudi Arabian agricultural sector. As a state-owned entity, its ownership is governmental, and its operations are aligned with national food security objectives. Recent news includes SALIC's efforts to enhance collaboration with domestic agricultural companies and support local food production initiatives. The company is actively working to integrate its global sourcing with domestic needs. The management board is led by Chairman Eng. Abdullah bin Abdulaziz Al-Rabiah and CEO Sulaiman Al Rumaih, who oversee the company's strategic direction and its contribution to Saudi Arabia's food security.

#### MANAGEMENT TEAM

- Eng. Abdullah bin Abdulaziz Al-Rabiah (Chairman)
- Sulaiman Al Rumaih (CEO)

#### RECENT NEWS

SALIC has been strengthening its domestic partnerships and initiatives to support local agricultural production, which includes ensuring the availability of key feed ingredients like alfalfa for Saudi Arabian farmers.

# 9

## **POLICY CHANGES AFFECTING TRADE**

## POLICY CHANGES AFFECTING TRADE

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This section provides an overview of recent policy changes that may impact trade and investment in the country under analysis. The information is sourced from the repository maintained by the Global Trade Alert (GTA). Usage of this material is permitted, provided that proper attribution is given to the Global Trade Alert (GTA).

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All materials presented in the following chapter of the report are sourced from the Global Trade Alert (GTA) database.

The Global Trade Alert is the world's premier repository of policy changes affecting global trade and investment. The GTA launched in June 2009, and since then, the independent team has documented tens of thousands state interventions worldwide. The evidence collected by GTA is regularly used by governments, international organizations and leading media brands around the globe.

The GTA is an initiative of the Swiss-based St. Gallen Endowment for Prosperity Through Trade, a neutral, non-profit organisation dedicated to increasing transparency of global policies affecting the digital economy, trade and investment.

For the most up-to-date information on global trade policies and regulations worldwide, we encourage you to visit the official website of the Global Trade Alert at <https://globaltradealert.org>.

**Note:** If the following pages do not include information on relevant policy measures, it indicates that no specific active policies related to the product and/or country analyzed were identified at the time of preparing this report based on the selected search criteria.

# SAUDI ARABIA: THE GOVERNMENT OPENS ITS NORTHERN BORDER FOR IRAQI IMPORTS

Date Announced: 2020-11-18

Date Published: 2021-05-23

Date Implemented: 2020-11-18

Alert level: **Green**

Intervention Type: **Import ban**

Affected Counties: **Iraq**

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On 18 November 2020, the Saudi government re-opened its Arar border for Iraqi imports to cross the northern border of the kingdom. Arar has been closed since 1990 after cutting ties with Iraq's former president Saddam Hussein during the Gulf War.

In this context according to Gulf News, Saudi Ambassador to Iraq Abdulaziz Alshamri said: "The Saudi-Iraq relations have been cut for about 27 years, and now we celebrate an accomplishment that suits the Saudi-Iraqi relations. We welcome all Iraqi products to be exported to Saudi and through this border, there will be an exchange of visits between the two countries."

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Source: Reuters, Iraq-Saudi Arabia border crossing opens for trade, first time since 1990, 18 November 2020, Available at: <https://www.reuters.com/article/us-iraq-saudi-arabia-border-trade/iraq-saudi-arabia-border-crossing-opens-for-trade-first-time-since-1990-idUSKBN27Y2GT> Gulf News, Iraq-Saudi Arabia border crossing opens for trade, first time since 1990, 18 November 2020, Available at: <https://gulfnews.com/world/gulf/saudi/iraq-saudi-arabia-border-crossing-opens-for-trade-first-time-since-1990-1.1605715634248> Iraqi Borders Post Commission, المنافذ الحدودية تعلن افتتاح منفذ عرعر الحدودي بشكل رسمي, 18 November 2020, Available at: <https://mcbpc.gov.iq/index.php?name=News&file=article&sid=1128>

## LIST OF ABBREVIATIONS AND TERMS USED

**Ad valorem tariff:** An ad valorem duty (tariff, charge, and so on) is based on the value of the dutiable item and expressed in percentage terms. For example, a duty of 20 percent on the value of automobiles.

**Applied tariff / Applied rates:** Duties that are actually charged on imports. These can be below the bound rates.

**Aggregation:** A process that transforms microdata into aggregate-level information by using an aggregation function such as count, sum average or standard deviation.

**Aggregated data:** Data generated by aggregating non-aggregated observations according to a well-defined statistical methodology.

**Approx.:** Short for "approximation", which is a guess of a number that is not exact but that is close.

**B:** billions (e.g. US\$ 10B)

**CAGR:** For the purpose of this report, the compound annual growth rate (CAGR) is the annualized average rate of growth of a specific indicator (e.g. imports, proxy prices) between two given years, assuming growth takes place at an exponentially compounded rate. The CAGR between given years X and Z, where  $Z - X = N$ , is the number of years between the two given years, is calculated as follows:

$$CAGR_{\text{from year X to year Z}} = \left( \frac{Value_{yearZ}}{Value_{yearX}} \right)^{(1/N)} - 1$$

**Current US\$:** Data reported in current (or "nominal") prices for each year are measured in the prices for that particular year. For example, GDP for 1990 are based on 1990 prices, for 2020 are based on 2020 prices, and so on. Current price series are influenced by the effects of inflation.

**Constant US\$:** Constant (or "real") price series show the data for each year in the prices of a chosen reference year. For example, reported GDP in constant 2015 prices show data for 2019, 2022, and all other years in 2015 prices. Constant price series are used to measure the true volume growth, i.e. adjusting for the effects of price inflation.

**CPI, Inflation:** Inflation as measured by the consumer price index reflects the annual percentage change in the cost to the average consumer of acquiring a basket of goods and services that may be fixed or changed at specified intervals, such as yearly.

**Country Credit Risk Classification:** The Organization for Economic Cooperation & Development (OECD) Country Risk Classification measures the country credit risk and the likelihood that a country will service its external debt. The index uses a scale of eight risk categories to determine a country's credit risk (from 0 to 7: 0 being risk free and 7 represents the highest level of country risk to service its external debt). The country risk classifications are not sovereign risk classifications and therefore should not be compared with the sovereign risk classifications of private credit rating agencies (CRAs).

**Country Market:** For the purpose of this report, this is the total number of all goods (in US\$ or volume values) which added to the stock of material resources of a country by entering (imports) its economic territory in a certain period of time (often measured over the course of a year).

**Competitors:** Businesses/companies who compete against each other in the same good market. This may also refer to a country on a global level.

**Domestic or foreign goods:** Specification of whether the good is of domestic or foreign origin.

**Domestic goods:** Can be defined as goods originating in the economic territory of a country. In general, goods are considered as originating in the country if they have been wholly obtained in it or were substantially transformed.

**Economic territory:** The area under the effective economic control of a single government.

**Estimation:** Estimation is concerned with inference about the numerical value of unknown population values from incomplete data such as a sample.

**Foreign goods:** Are goods which originate from the rest of the world (including foreign goods in transit through the compiling country) or are obtained under the outward processing procedure, when such processing confers foreign origin (compensating products which changed origin).

**Growth rates:** refer to the percentage change of a specific variable within a specific time period.

**GDP (current US\$):** Gross Domestic Product at purchaser's prices is the sum of gross value added by all resident producers in the economy plus any product taxes and minus any subsidies not included in the value of the products. It is calculated without making deductions for depreciation of fabricated assets or for depletion and degradation of natural resources. Data are in current U.S. dollars. Dollar figures for GDP are converted from domestic currencies using single year official exchange rates. For a few countries where the official exchange rate does not reflect the rate effectively applied to actual foreign exchange transactions, an alternative conversion factor is used.

## LIST OF ABBREVIATIONS AND TERMS USED

**GDP (constant 2015 US\$):** Gross Domestic Product at purchaser's prices is the sum of gross value added by all resident producers in the economy plus any product taxes and minus any subsidies not included in the value of the products. It is calculated without making deductions for depreciation of fabricated assets or for depletion and degradation of natural resources. Data are in constant 2015 prices, expressed in U.S. dollars. Dollar figures for GDP are converted from domestic currencies using 2015 official exchange rates. For a few countries where the official exchange rate does not reflect the rate effectively applied to actual foreign exchange transactions, an alternative conversion factor is used.

**GDP growth (annual %):** Annual percentage growth rate of GDP at market prices based on constant local currency. An economy's growth is measured by the change in the volume of its output or in the real incomes of its residents. The 2008 United Nations System of National Accounts (2008 SNA) offers three plausible indicators for calculating growth: the volume of gross domestic product (GDP), real gross domestic income, and real gross national income. The volume of GDP is the sum of value added, measured at constant prices, by households, government, and industries operating in the economy. GDP accounts for all domestic production, regardless of whether the income accrues to domestic or foreign institutions.

**Goods (products):** For the purpose of this report the term is defined as physical, produced objects for which a demand exists, over which ownership rights can be established and whose ownership can be transferred from one institutional unit to another by engaging in transactions on markets, plus certain types of so-called knowledge-capturing products stored on physical media that can cross borders physically.

**Goods in transit:** Goods are considered as simply being transported through a country if they (a) enter and leave the compiling country solely for the purpose of being transported to another country, (b) are not subject to halts not inherent to the transportation and (c) can be identified when both entering and leaving the country.

**General imports and exports:** Are flows of goods entering/leaving the statistical territory of a country applying the general trade system and recorded in compliance with the general and specific guidelines.

### General imports consist of:

(a) Imports of foreign goods (including compensating products after outward processing which changed their origin from domestic to foreign) entering the free circulation area, premises for inward processing, industrial free zones, premises for customs warehousing or commercial free zones;

(b) Re-imports of domestic goods into the free circulation area, premises for inward processing or industrial free zones, premises for customs warehousing or commercial free zones.

### General exports consist of:

(a) Exports of domestic goods (including compensating products after inward processing which changed their origin from foreign to domestic) from any part of the statistical territory, including free zones and customs warehouses;

(b) Re-exports of foreign goods from any part of the statistical territory, including free zones and customs warehouses.

**Global Market:** For the purpose of this report, the term represents the sum of imports (either in US\$ or volume terms) of a particular good of all countries who reported these data to the UN Comtrade database. Important to mention, the term doesn't include local production of that good, which may account for a large part. Thus, the term covers only global Imports flow.

**The Harmonized Commodity Description and Coding Systems (HS, Harmonized System):** an internationally recognized commodity classification developed and maintained by The World Customs Organization (WCO). The system is used by more than 200 countries and economies as a basis for their Customs tariffs and for the collection of international trade statistics. Over 98 % of the merchandise in international trade is classified in terms of the HS. The HS comprises over 5,600 separate groups of goods identified by a 6-digit code, arranged in 99 chapters, grouped in 21 sections.

**HS Code:** At the international level, the Harmonized System for classifying goods is a six-digit code system (HS code, Commodity Code, Product Code), which can be broken down into three parts. The first two digits (HS-2) identify the chapter the goods are classified in, e.g., 01 Animals; live. The next two digits (HS-4) identify groupings within that chapter (the heading), e.g., 0104 - Sheep and goats; live. The following two digits (HS-6) are even more specific (the subheading), e.g., 010410 - Sheep; live. Up to the HS-6 digit level, all countries classify products in the same way (a few exceptions exist where some countries apply old versions of the HS).

**Imports penetration:** Import penetration ratios are defined as the ratio between the value of imports as a percentage of total domestic demand. The import penetration rate shows to what degree domestic demand D is satisfied by imports M. It is calculated as  $M/D$ , where the domestic demand is the GDP minus exports plus imports i.e.  $[D = GDP - X + M]$ . From a macroeconomic perspective, a country that produces manufactured goods with a high degree of international competitiveness will see decreasing imports. Under these circumstances, the import penetration rate will fall. Conversely, a country that produces manufactured goods with a low degree of international competitiveness will see increasing imports. In this case, the import penetration will rise. It must be noted, however, that the relationship described here does not always hold. Two factors – Import barriers and transaction costs – may interfere with it. If a country has established import barriers, another country's comparatively better manufactured goods will have little impact on its imports, and its import penetration rate will not rise. Likewise, if transportation and other transaction costs are extremely high for traded goods, differences in international competitiveness may not be reflected in the import penetration rate.

## LIST OF ABBREVIATIONS AND TERMS USED

**International merchandise trade statistics:** Refers to both foreign (or external) merchandise trade statistics as compiled by countries and international merchandise trade statistics as represented by the consolidated and standardized country data sets that are compiled and maintained by the international or regional agencies.

**Importer/exporter:** In general, refers to the party in the customs territory who signed the contract of purchase/sale and/or who is responsible for executing the contract (i.e., the agent responsible for effecting import into or export from a country). Each importer or exporter is usually assigned a unique identification number.

**Imports volume:** The number or amount of Imports in general, typically measured in kilograms.

**Imputation:** Procedure for entering a value for a specific data item where the response is missing or unusable.

**Imports value:** The price actually paid for all imported units (by quantity unit) of the given commodity (unit price multiplied by quantity), or the cost of the commodity if not sold or purchased.

**Institutional unit:** The elementary economic decision-making center characterized by uniformity of behavior and decision-making autonomy in the exercise of its principal function.

**K:** thousand (e.g. US\$ 10K)

**Ktons:** thousand tons (e.g. 1 Ktons)

**LTM:** For the purpose of this report, LTM means Last Twelve Months for which the trade data are available. This period may not coincide with calendar period though, which is often the case with the trade data.

**Long-term growth rate:** For the purpose of this report, it is a metric that is used to express the change in a variable, represented as a percentage, and is used interchangeably with CAGR.

**Long-Term:** For the purpose of this report, it is equivalent to a period used for calculation of CAGR.

**M:** million (e.g. US\$ 10M)

**Market:** For the purpose of this report the terms Market and Imports may be used interchangeably, since both refer to a particular good which is bought and sold in particular country. The distinctive feature is that the Market term includes only imports of a particular good to a particular country. It does not include domestic production of such good or anything else.

**Microdata:** Data on the characteristics of individual transactions collected by customs or other sources (such as administrative records or surveys) or estimated.

**Macrodata:** Data derived from microdata by grouping or aggregating them, such as total exports of goods classified in a particular HS subheading.

**Mirror statistics:** Mirror statistics are used to conduct bilateral comparisons of two basic measures of a trade flow and are a traditional tool for detecting the causes of asymmetries in statistics.

**Mean value:** The arithmetic mean, also known as "arithmetic average", is a measure of central tendency of a finite set of numbers: specifically, the sum of the values divided by the number of values.

**Median value:** Is the value separating the higher half from the lower half of a data sample, a population, or a probability distribution.

**Marginal Propensity to Import:** Is the amount imports increase or decrease with each unit rise or decline in disposable income. The idea is that rising income for businesses and households spurs greater demand for goods from abroad and vice versa.

**Trade Freedom Classification:** Trade freedom is a composite measure of the absence of tariff and non-tariff barriers that affect imports and exports of goods and services. The trade freedom score is based on two inputs:

The trade-weighted average tariff rate and

Non-tariff barriers (NTBs).

For more information on the methodology, please, visit: <https://www.heritage.org/index/trade-freedom>

**Market size (Market volumes):** For the purpose of this report, it refers to the total number of specific good (in US\$ or volume values) which added to the stock of relevant material resources in a certain period of time (often measured over the course of a year). This term may refer to country, region, or world (global) levels.

**Net weight (kilograms):** the net shipping weight, excluding the weight of packages or containers.



## LIST OF ABBREVIATIONS AND TERMS USED

**OECD:** The Organisation for Economic Co-operation and Development (OECD) is an intergovernmental organisation with 38 member countries, founded in 1961 to stimulate economic progress and world trade. It is a forum whose member countries describe themselves as committed to democracy and the market economy, providing a platform to compare policy experiences, seek answers to common problems, identify good practices, and coordinate domestic and international policies of its members. The majority of OECD Members are high-income economies ranked as "very high" in the Human Development Index, and are regarded as developed countries. Their collective population is 1.38 billion. As of 2017, OECD Member countries collectively comprised 62.2% of global nominal GDP (USD 49.6 trillion) and 42.8% of global GDP (Int\$54.2 trillion) at purchasing power parity.

**The OECD Country Risk Classification** measures the country credit risk and the likelihood that a country will service its external debt. The index uses a scale of eight risk categories to determine a country's credit risk, with 0 representing the lowest level of country risk. For more information, visit <https://www.oecd.org/>

**Official statistics:** Statistics produced in accordance with the Fundamental Principles of Official Statistics by a national statistical office or by another producer of official statistics that has been mandated by the national government or certified by the national statistical office to compile statistics for its specific domain.

**Proxy price:** For the purpose of this report, the term is a broad representation of actual price of a specific good in a specific market. Proxy price acts as a substitute for actual price for the reason of being calculated rather than obtained from the market directly. Proxy price implies very closer meaning as unit values used in international trade statistics.

**Prices:** For the purpose of this report the term always refers to prices on imported goods, except for explicit definitions, e.g. consumer price index.

**Production:** Economic production may be defined as an activity carried out under the control and responsibility of an institutional unit that uses inputs of labor, capital, and goods and services to produce outputs of goods or services.

**Physical volumes:** For the purpose of this report, this term indicates foreign trade (imports or exports flows) denominated in units of measure of weight, typically in kilograms.

**Quantity units (Volume terms):** refer to physical characteristics of goods. The use of appropriate quantity units may also result in more internationally comparable data on international movements of goods, because differences in quantity measurements between the importing country and the exporting country can be less significant than in value measurements. Therefore, quantities are often used in checking the reliability of the value data via the calculation of so-called unit values (value divided by quantity). It is recommended that countries collect or estimate, validate and report quantity information in the World Customs Organization (WCO) standard units of quantity (e.g. kilograms) and in net weight (i.e. not including packaging) on all trade transactions.

**RCA Index:** Revealed Comparative Advantage Index Comparative advantage underlies economists' explanations for the observed pattern of inter-industry trade. In theoretical models, comparative advantage is expressed in terms of relative prices evaluated in the absence of trade. Since these are not observed, in practice we measure comparative advantage indirectly. Revealed comparative advantage indices (RCA) use the trade pattern to identify the sectors in which an economy has a comparative advantage, by comparing the country of interests' trade profile with the world average. The RCA index is defined as the ratio of two shares. The numerator is the share of a country's total exports of the commodity of interest in its total exports. The denominator is share of world exports of the same commodity in total world exports.

$$RSA = \frac{\sum_d x_{isd} / \sum_d X_{sd}}{\sum_{wd} x_{iwd} / \sum_{wd} X_{wd}},$$

where

**s** is the country of interest,

**d** and **w** are the set of all countries in the world,

**i** is the sector of interest,

**x** is the commodity export flow and

**X** is the total export flow.

The numerator is the share of good i in the exports of country s, while the denominator is the share of good i in the exports of the world.

**Re-imports:** Are imports of domestic goods which were previously recorded as exports.

**Re-exports:** Are exports of foreign goods which were previously recorded as imports.

## LIST OF ABBREVIATIONS AND TERMS USED

**Real Effective Exchange Rate (REER):** It is an indicator of a nation's competitiveness in relation to its trading partners. It is a measure of the relative strength of a nation's currency in comparison with those of the nations it trades with. It is used to judge whether the nation's currency is undervalued or overvalued or, ideally, fairly valued. Economists use REER to evaluate a country's trade flow and analyze the impact that factors such as competition and technological changes are having on a country and its economy. An increase in a nation's REER means businesses and consumers have to pay more for the products they export, while their own people are paying less for the products that it imports. It is losing its trade competitiveness, but the environment gets more favorable to Imports.

**Short-term growth rate:** For the purpose of this report, it is a metric that is used to express the change in a variable, represented as a percentage, and used interchangeably with LTM.

**Statistical data:** Data collected, processed or disseminated by a statistical organization for statistical purposes.

**Seasonal adjustment:** Statistical method for removing the seasonal component of a time series.

**Seasonal component:** Fluctuations in a time series that exhibit a regular pattern at a particular time during the course of a year which are similar from one year to another.

**Short-Term:** For the purpose of this report, it is equivalent to the LTM period.

**T:** tons (e.g. 1T)

**Trade statistics:** For the purposes of this report, the term will be used to refer to international, foreign or external merchandise trade statistics, unless otherwise indicated, and the term "merchandise" has the same meaning as the terms, "products", "goods" and "commodities".

**Total value:** The price actually paid for all units (by quantity unit) of the given commodity (unit price multiplied by quantity), or the cost of the commodity if not sold or purchased.

**Re-exports:** Are exports of foreign goods which were previously recorded as imports.

**Time series:** A set of values of a particular variable at consecutive periods of time.

**Tariff binding:** Maximum duty level on a product listed in a member's schedule of commitments; it represents the commitment not to exceed the duty applied on the concerned product beyond the level bound in the schedule. Once a rate of duty is bound, it may not be raised without compensating the affected parties. For developed countries, the bound rates are generally the rates actually charged. Most developing countries have bound the rates somewhat higher than the actual rates charged, so the bound rates serve as ceilings.

**The terms of trade (ToT):** is the relative price of exports in terms of imports and is defined as the ratio of export prices to import prices. It can be interpreted as the amount of import goods an economy can purchase per unit of export goods. An improvement of a nation's terms of trade benefits that country in the sense that it can buy more imports for any given level of exports. The terms of trade may be influenced by the exchange rate because a rise in the value of a country's currency lowers the domestic prices of its imports but may not directly affect the prices of the commodities it exports.

**Trade Dependence, %GDP:** Is the sum of exports and imports of goods and services measured as a share of gross domestic product. This indicator shows to what extent the country's economy relies on foreign trade as compared to its GDP.

**US\$:** US dollars

**WTO:** the World Trade Organization (WTO) is an intergovernmental organization that regulates and facilitates international trade. The World Trade Organization (WTO) is the only global international organization dealing with the rules of trade between nations. At its heart are the WTO agreements, negotiated and signed by the bulk of the world's trading nations and ratified in their parliaments. The goal is to ensure that trade flows as smoothly, predictably and freely as possible. With effective cooperation in the United Nations System, governments use the organization to establish, revise, and enforce the rules that govern international trade. It officially commenced operations on 1 January 1995, pursuant to the 1994 Marrakesh Agreement, thus replacing the General Agreement on Tariffs and Trade (GATT) that had been established in 1948. The WTO is the world's largest international economic organization, with 164 member states representing over 98% of global trade and global GDP.

**Y:** year (e.g. 5Y – five years)

**Y-o-Y:** Year-over-year (YOY) is a financial term used to compare data for a specific period of time with the corresponding period from the previous year. It is a way to analyze and assess the growth or decline of a particular variable over a twelve-month period.

# METHODOLOGY

Following is a list of use cases of application of specific words combinations across the report. The selection is based on calculated values of corresponding indicators.

## 1. Country Market Trend:

- In case the calculated growth rates for the LTM period exceeded the value of 5Y CAGR by 0.5 percentage points or more, then **"surpassed"** is used, if it was 0.5 percentage points or more lower than 5Y CAGR then it is **"underperformed"**. In case, if the calculated growth rate for the LTM period was within the interval of 5Y CAGR  $\pm$  5 percentage points (including boundary values), then either **"followed"** or **"was comparable to"** is used.

## 2. Global Market Trends US\$-terms:

- If the "Global Market US\$-terms CAGR, %" value was less than 0%, the **"declining"** is used,
- If the "Global Market US\$-terms CAGR, %" value was more than or equal to 0% and less than 4%, then **"stable"** is used,
- If the "Global Market US\$-terms CAGR, %" value was more than or equal to 4% and less than 6%, then **"growing"** is used,
- If the "Global Market US\$-terms CAGR, %" value was more than 6%, then **"fast growing"** is used.

## 3. Global Market Trends t-terms:

- If the "Global Market t-terms CAGR, %" value was less than 0%, the **"declining"** is used,
- If the "Global Market t-terms CAGR, %" value was more than or equal to 0% and less than 4%, then **"stable"** is used,
- If the "Global Market t-terms CAGR, %" value was more than or equal to 4% and less than 6%, then **"growing"** is used,
- If the "Global Market t-terms CAGR, %" value was more than 6%, then **"fast growing"** is used.

## 4. Global Demand for Imports:

- If the calculation of the change in share of a specific product in the total imports of the country was more than 0.5 percentage points, then the **"growing"** was used,
- If the calculation of the change in share of a specific product in the total imports of the country was less than 0.5%, then the **"declining"** was used,
- If the calculation of the change in share of a specific product in the total imports of the country was within the range of  $\pm$  0.5% (including boundary values), then the **"remain stable"** was used,

## 5. Long-term market drivers:

- **"Growth in Prices accompanied by the growth in Demand"** is used, if the "Global Market t-terms CAGR, %" was more than 2% and the "Inflation 5Y average" was more than 0% and the "Inflation contribution to US\$-term CAGR%" was more than 50%,
- **"Growth in Demand"** is used, if the "Global Market t-terms CAGR, %" was more than 2% and the "Inflation 5Y average" was more than 0% and the "Inflation contribution to US\$-term CAGR%" was less than or equal to 50%,
- **"Growth in Prices"** is used, if the "Global Market t-terms CAGR, %" was more than 0% or less than or equal to 2%, and the "Inflation 5Y average" was more than 4%,
- **"Stable Demand and stable Prices"** is used, if the "Global Market t-terms CAGR, %" was more than or equal to 0%, and the "Inflation 5Y average" was more than of equal to 0% and less than or equal to 4%,
- **"Growth in Demand accompanied by declining Prices"** is used, if the "Global Market t-terms CAGR, %" was more than 0%, and the "Inflation 5Y average" was less than 0%,
- **"Decline in Demand accompanied by growing Prices"** is used, if the "Global Market t-terms CAGR, %" was less than 0%, and the "Inflation 5Y average" was more than 0%,
- **"Decline in Demand accompanied by declining Prices"** is used, if the "Global Market t-terms CAGR, %" was less than 0%, and the "Inflation 5Y average" was less than 0%,

## 6. Rank of the country in the World by the size of GDP:

- **"Largest economy"**, if GDP (current US\$) is more than 1,800.0 B,
- **"Large economy"**, if GDP (current US\$) is less than 1,800.0 B and more than 1,000.0 B,
- **"Midsize economy"**, if GDP (current US\$) is more than 500.0 B and less than 1,000.0 B,
- **"Small economy"**, if GDP (current US\$) is more than 50.0 B and less than 500.0 B,
- **"Smallest economy"**, if GDP (current US\$) is less than 50.0 B,
- **"Impossible to define due to lack of data"**, if the country didn't provide data.

## 7. Economy Short Term Growth Pattern:

- **"Fastest growing economy"**, if GDP growth (annual %) is more than 17%,
- **"Fast growing economy"**, if GDP growth (annual %) is less than 17% and more than 10%,
- **"Higher rates of economic growth"**, if GDP growth (annual %) is more than 5% and less than 10%,
- **"Moderate rates of economic growth"**, if GDP growth (annual %) is more than 3% and less than 5%,
- **"Slowly growing economy"**, if GDP growth (annual %) is more than 0% and less than 3%,
- **"Economic decline"**, if GDP growth (annual %) is between -5 and 0%,
- **"Economic collapse"**, if GDP growth (annual %) is less than -5%,
- **"Impossible to define due to lack of data"**, if the country didn't provide data.

## 8. Classification of countries in accordance to income level. The methodology has been provided by the World Bank, which classifies countries in the following groups:

- **low-income economies** are defined as those with a GNI per capita, calculated using the World Bank Atlas method, of \$1,135 or less in 2022,
- **lower middle-income economies** are those with a GNI per capita between \$1,136 and \$4,465,
- **upper middle-income economies** are those with a GNI per capita between \$4,466 and \$13,845,
- **high-income economies** are those with a GNI per capita of \$13,846 or more,
- **"Impossible to define due to lack of data"**, if the country didn't provide data.

For more information, visit <https://datahelpdesk.worldbank.org>

## 9. Population growth pattern:

- **"Quick growth in population"**, in case annual population growth is more than 2%,
- **"Moderate growth in population"**, in case annual population growth is more than 0% and less than 2%,
- **"Population decrease"**, in case annual population growth is less than 0% and more than -5%,
- **"Extreme slide in population"**, in case annual population growth is less than -5%,
- **"Impossible to define due to lack of data"**, in case there are not enough data.

## 10. Short-Term Imports Growth Pattern:

- **"Extremely high growth rates"**, in case if Imports of goods and services (annual % growth) is more than 20%,
- **"High growth rates"**, in case if Imports of goods and services (annual % growth) is more than 10% and less than 20%,
- **"Stable growth rates"**, in case if Imports of goods and services (annual % growth) is more than 0% and less than 10%,
- **"Moderately decreasing growth rates"**, in case if Imports of goods and services (annual % growth) is less than 0% and more than -10%,
- **"Extremely decreasing growth rates"**, in case if Imports of goods and services (annual % growth) is less than -10%,
- **"Impossible to define due to lack of data"**, in case there are not enough data.

## 11. Country's Short-Term Reliance on Imports:

- **"Extreme reliance"**, in case if Imports of goods and services (% of GDP) is more than 100%,
- **"High level of reliance"**, in case if Imports of goods and services (% of GDP) is more than 50% and less than 100%,
- **"Moderate reliance"**, in case if Imports of goods and services (% of GDP) is more than 30% and less than 50%,
- **"Low level of reliance"**, in case if Imports of goods and services (% of GDP) is more than 10% and less than 30%,
- **"Practically self-reliant"**, in case if Imports of goods and services (% of GDP) is more than 0% and less than 10%,
- **"Impossible to define due to lack of data"**, in case there are not enough data.

## 12. Short-Term Inflation Profile:

- **"Extreme level of inflation"**, in case if Inflation, consumer prices (annual %) is more than 40%,
- **"High level of inflation"**, in case if Inflation, consumer prices (annual %) is more than 20% and less than 40%,
- **"Elevated level of inflation"**, in case if Inflation, consumer prices (annual %) is more than 10% and less than 20%,
- **"Moderate level of inflation"**, in case if Inflation, consumer prices (annual %) is more than 4% and less than 10%,
- **"Low level of inflation"**, in case if Inflation, consumer prices (annual %) is more than 0% and less than 4%,
- **"Deflation"**, in case if Inflation, consumer prices (annual %) is less than 0%,
- **"Impossible to define due to lack of data"**, in case there are not enough data.

### 13. Long-Term Inflation Profile:

- **"Inadequate inflationary environment"**, in case if Consumer price index (2010 = 100) is more than 10,000%,
- **"Extreme inflationary environment"**, in case if Consumer price index (2010 = 100) is more than 1,000% and less than 10,000%,
- **"Highly inflationary environment"**, in case if Consumer price index (2010 = 100) is more than 500% and less than 1,000%,
- **"Moderate inflationary environment"**, in case if Consumer price index (2010 = 100) is more than 200% and less than 500%,
- **"Low inflationary environment"**, in case if Consumer price index (2010 = 100) is more than 150% and less than 200%,
- **"Very low inflationary environment"**, in case if Consumer price index (2010 = 100) is more 100% and less than 150%,
- **"Impossible to define due to lack of data"**, in case there are not enough data.

### 14. Short-term ForEx and Terms of Trade environment:

- **"More attractive for imports"**, in case if the change in Real effective exchange rate index (2010 = 100) is more than 0,
- **"Less attractive for imports"**, in case if the change in Real effective exchange rate index (2010 = 100) is less than 0,
- **"Impossible to define due to lack of data"**, in case there are not enough data.

### 15. The OECD Country Risk Classification:

- **"Risk free country to service its external debt"**, in case if the OECD Country risk index equals to 0,
- **"The lowest level of country risk to service its external debt"**, in case if the OECD Country risk index equals to 1,
- **"Low level of country risk to service its external debt"**, in case if the OECD Country risk index equals to 2,
- **"Somewhat low level of country risk to service its external debt"**, in case if the OECD Country risk index equals to 3,
- **"Moderate level of country risk to service its external debt"**, in case if the OECD Country risk index equals to 4,
- **"Elevated level of country risk to service its external debt"**, in case if the OECD Country risk index equals to 5,
- **"High level of country risk to service its external debt"**, in case if the OECD Country risk index equals to 6,
- **"The highest level of country risk to service its external debt"**, in case if the OECD Country risk index equals to 7,
- **"Micro state: not reviewed or classified"**, in case of Andorra, Morocco, San Marino, because these are very small countries that do not generally receive official export credit support.
- **"High Income OECD country": not reviewed or classified**, in case of Australia, Austria, Belgium, Croatia, Cyprus, Canada, Chile, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Israel, Italy, Japan, Korea, Rep., Latvia, Lithuania, Luxembourg, Malta, Netherlands, New Zealand, Norway, Poland, Portugal, Slovak Republic, Slovenia, Spain, Sweden, Switzerland, United Kingdom, United States, because these are high income OECD countries and other high income Euro zone countries that are not typically classified.
- **"Currently not reviewed or classified"**, in case of Barbados, Belize, Brunei Darussalam, Comoros, Dominica, Grenada, Kiribati, Liechtenstein, Macao SAR, China, Marshall Islands, Micronesia, Fed. Sts., Nauru, Palau, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, Samoa, Sao Tome and Principe, Seychelles, Sint Maarten, Solomon Islands, Tonga, Tuvalu, Vanuatu, because these countries haven't been classified.
- **"There are no data for the country"**, in case if the country is not being classified.

**16. Trade Freedom Classification.** The Index of Economic Freedom is a tool for analyzing 184 economies throughout the world. It measures economic freedom based on 12 quantitative and qualitative factors, grouped into four broad categories, or pillars, of economic freedom: (1) Rule of Law (property rights, government integrity, judicial effectiveness), (2) Government Size (government spending, tax burden, fiscal health), (3) Regulatory Efficiency (business freedom, labor freedom, monetary freedom), (4) Open Markets (trade freedom, investment freedom, financial freedom). For the purpose of this report we use the Trade freedom subindex to reflect country's position in the world with respect to international trade.

- **"Repressed"**, in case if the Trade freedom subindex is less than or equal to 50 and more than 0,
- **"Mostly unfree"**, in case if the Trade freedom subindex is less than or equal to 60 and more than 50,
- **"Moderately free"**, in case if the Trade freedom subindex is less than or equal to 70 and more than 60,
- **"Mostly free"**, in case if the Trade freedom subindex is less than or equal to 80 and more than 70,
- **"Free"**, in case if the Trade freedom subindex is less than or equal to 100 and more than 80,
- **"There are no data for the country"**, in case if the country is not being classified.

**17. The competition landscape / level of risk to export to the specified country:**

- **“risk free with a low level of competition from domestic producers of similar products”**, in case if the RCA index of the specified product falls into the 90th quantile,
- **“somewhat risk tolerable with a moderate level of local competition”**, in case if the RCA index of the specified product falls into the range between the 90th and 92nd quantile,
- **“risk intense with an elevated level of local competition”**, in case if the RCA index of the specified product falls into the range between the 92nd and 95th quantile,
- **“risk intense with a high level of local competition”**, in case if the RCA index of the specified product falls into the range between the 95th and 98th quantile,
- **“highly risky with extreme level of local competition or monopoly”**, in case if the RCA index of the specified product falls into the range between the 98th and 100th quantile,
- **“Impossible to define due to lack of data”**, in case there are not enough data.

**18. Capabilities of the local businesses to produce similar competitive products:**

- **“low”**, in case the competition landscape is risk free with a low level of competition from domestic producers of similar products,
- **“moderate”**, in case the competition landscape is somewhat risk tolerable with a moderate level of local competition,
- **“promising”**, in case the competition landscape is risk intense with an elevated level of local competition or risk intense with a high level of local competition,
- **“high”**, in case the competition landscape is highly risky with extreme level of local competition or monopoly,
- **“Impossible to define due to lack of data”**, in case there are not enough data.

**19. The strength of the effect of imports of particular product to a specified country:**

- **“low”**, in case if the share of the specific product is less than 0.1% in the total imports of the country,
- **“moderate”**, in case if the share of the specific product is more than or equal to 0.1% and less than 0.5% in the total imports of the country,
- **“high”**, in case if the share of the specific product is equal or more than 0.5% in the total imports of the country.

**20. A general trend for the change in the proxy price:**

- **“growing”**, in case if 5Y CAGR of the average proxy prices, or growth of the average proxy prices in LTM is more than 0,
- **“declining”**, in case if 5Y CAGR of the average proxy prices, or growth of the average proxy prices in LTM is less than 0,

**21. The aggregated country's ranking to determine the entry potential of this product market:**

- **Scores 1-5:** Signifying high risks associated with market entry,
- **Scores 6-8:** Indicating an uncertain probability of successful entry into the market,
- **Scores 9-11:** Suggesting relatively good chances for successful market entry,
- **Scores 12-14:** Pointing towards high chances of a successful market entry.

**22. Global market size annual growth rate, the best-performing calendar year:**

- **“Growth in Prices accompanied by the growth in Demand”** is used, if the “Country Market t-term growth rate, %” was more than 2% and the “Inflation growth rate, %” was more than 0% and the “Inflation contribution to \$-term growth rate, %” was more than 50%,
- **“Growth in Demand”** is used, if the “Country Market t-term growth rate, %” was more than 2% and the “Inflation growth rate, %” was more than 0% and the “Inflation contribution to \$-term growth rate, %” was less than or equal to 50%,
- **“Growth in Prices”** is used, if the “Country Market t-term growth rate, %” was more than 0% and less than or equal to 2%, and the “Inflation growth rate, %” was more than 4%,
- **“Stable Demand and stable Prices”** is used, if the “Country Market t-term growth rate, %” was more than or equal to 0% and less than or equal to 2%, and the “Inflation growth rate, %” was more than or equal to 0% and less than or equal to 4%,
- **“Growth in Demand accompanied by declining Prices”** is used, if the “Country Market t-term growth rate, %” was more than 0%, and the “Inflation growth rate, %” was less than 0%,
- **“Decline in Demand accompanied by growing Prices”** is used, if the “Country Market t-term growth rate, %” was less than 0%, and the “Inflation growth rate, %” was more than 0%.



## 23. Global market size annual growth rate, the worst-performing calendar year:

- **“Declining average prices”** is used if “Country Market t term growth rate, %” is more than 0%, and “Inflation growth rate, %” is less than 0%
- **“Low average price growth”** is used if “Country Market t term growth rate, %” is more than 0%, and “Inflation growth rate, %” is more than 0%,
- **“Biggest drop in import volumes with low average price growth”** is used if “Country Market t term growth rate, %” is less than 0%, and “Inflation growth rate, %” is more than 0%,
- **“Decline in Demand accompanied by decline in Prices”** is used if “Country Market t term growth rate, %” is less than 0%, and “Inflation growth rate, %” is less than 0%.

## 24. TOP-5 Countries Ranking:

Top-10 biggest suppliers in last calendar year are being ranked according to 4 components:

1. share in imports in LTM,
2. proxy price in LTM,
3. change of imports in US\$-terms in LTM, and
4. change of imports in volume terms in LTM

Each of the four components ranges from 1 to 10, with 10 being the highest. The aggregated score is being formed as a sum of scores of ranking of each component. However, in case if countries get similar scores, the ranking of the first component prevails in selection.

## 25. Export potential:

As a part of risks estimation component and business potential of export to the country, a system of ranking has been introduced. It helps to rank a country based on a set of macroeconomic and market / sectoral parameters covered in this report. Seven ranking components have been selected:

1. Long-term trends of Global Demand for Imports (refer to pages 17-20 of the report)
2. Strength of the Demand for Imports in the selected country (refer to pages 22-23 of the report)
3. Macroeconomic risks for Imports in the selected country (refer to pages 22-23 of the report)
4. Market entry barriers and domestic competition pressures for imports of the good (refer to pages 22-24 of the report)
5. Long-term trends of Country Market (refer to pages 26-29 of the report)
6. Short-term trends of Country Market, US\$-terms (refer to pages 30-31 of the report)
7. Short-term trends of Country Market, volumes and proxy prices (refer to pages 32-35 of the report)

Each component includes 4-6 specific parameters. All parameters are evaluated on a scale from 0 to 6, with 0 being the lowest/ less favorable value or characteristic. An aggregated rank is a total country's score that includes scores of each specific ranking component. Each component is evaluated on a scale from 0 to 2, with 0 being the lowest score. The highest possible aggregated country's score is 14 points (up to 2 points for each of 7 ranking components). Aggregated country's rank is a sum of points gained for each ranking component. It ranges from 0 to 14 points. An aggregated rank describes risks and imports potential of the selected country with the selected product.

## 26. Market volume that may be captured in the mid-term:

The result of the market research is an approximation of the potential supply volume for the specific product in the designated market, provided the continuation of the identified trends in the future. The potential supply volume comprises two components:

1. **Component 1** is related to the ongoing trend in market development. The calculation is based on the anticipated average monthly market growth, derived from the trend observed over the past 24 months (you can find this trend currently calculated for tons on the report page 32). The assumption is that the identified trend will remain unchanged, and the calculated average monthly increase is applied to actual data on the volume of average monthly import supplies over the last 12 months, along with the corresponding average price. Simultaneously, the computation is based on the idea that a new supplier could secure a market share equivalent to the average share held by the top 10 largest suppliers in this market over the past 12 months: The potential supply in dollars per month for a new player, according to Component 1, is calculated by multiplying the following factors: Average monthly volume of imports into the country in tons × Average monthly increase in imports over the last 24 months (month-on-month growth) × Average market share for the top 10 supplying countries × Average import price over the last 12 months. Component 1 could be zero in the event of a negative short-term trend in imports of the specified product into the country over the past 24 months.
2. **Component 2** signifies the extra potential supply linked to the potential strong competitive advantage of the new supplier. Its calculation is based on the factual parameters of supplying countries that have experienced the highest growth in their supplies to the chosen country over the past 12 months. The assumption is that this increase is attributed to their respective competitive advantages. The potential supply volume in dollars per month for a new player, based on Component 2, is calculated by dividing the average increase in imports in tons over the last 12 months compared to the previous 12 months for the top 5 countries that have most increased imports into the country by 12 months. The result is then multiplied by the average import price over the last 12 months.

The total increase is determined by summing the values obtained from the two components.

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