Volume 01
Issue 01
November
2026

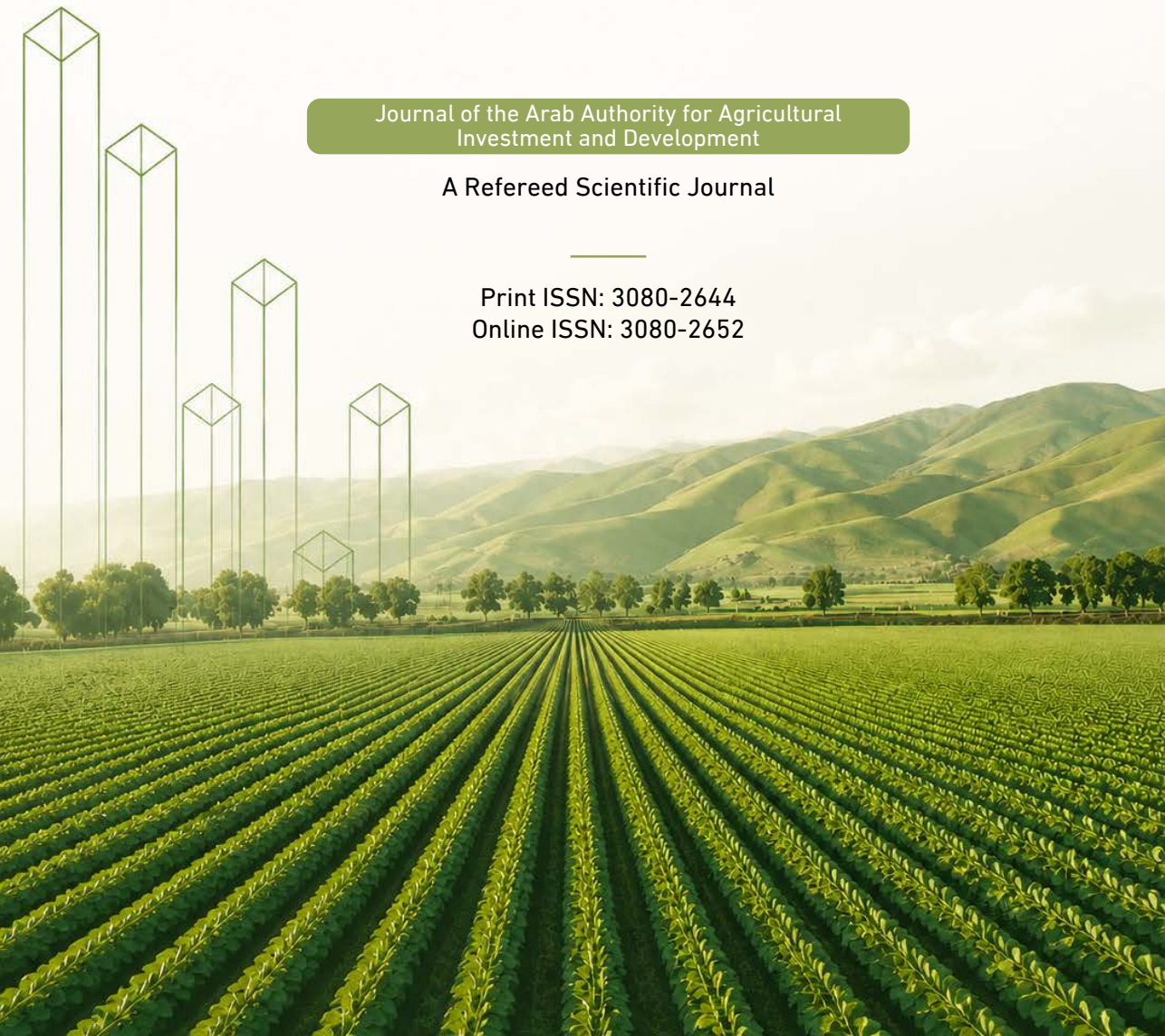
الهيئة العربية
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ARAB AUTHORITY FOR
AGRICULTURAL INVESTMENT & DEVELOPMENT

Journal of Investment & Sustainable Food Security

Journal of the Arab Authority for Agricultural Investment and Development

A Refereed Scientific Journal

Print ISSN: 3080-2644
Online ISSN: 3080-2652



Journal of Investment & Sustainable Food Security, Volume 1, No.1 November 2026

https://doi.org/10.68363/jifs.01.01.44

Assessment of the Gulf Cooperation Council (GCC) Countries' Direct Agricultural Investment in North and East Africa

Mohamed A. Ateia Elhabib [1]

Raeda Osman [2,3]

Tamrat Challa [2]

Eihab Fathelrahman [2,3]

Kenana Sugar Company, Khartoum, Sudan[1]

Department of Integrative Agriculture, College of Agriculture and Veterinary Medicine, United Arab Emirates University (UAEU), UAE[2]

ASPIRE Research Institute for Food Security in the Drylands (ARIFSID), United Arab Emirates University, UAE[3]

Received Date: 18-02-2026 Accepted Date: 12-07-2026

Abstract:

This scoping review examines the agricultural investment strategies of Gulf Cooperation Council (GCC) countries in North and East Africa, focusing on their implications for food security and economic development. The review is guided by four research questions that address the motivations, outcomes, challenges, and gaps in the literature associated with these investments. Following PRISMA-ScR guidelines, a systematic search of Scopus, Web of Science, and JSTOR, supplemented by grey literature, identified 34 sources for full review. The GCC's pursuit of agricultural investments is primarily driven by the need to secure stable food supplies and diversify the economies of countries heavily reliant on oil revenues. Three dominant investment models are identified: government-to-government agreements, long-term land leases, and state-backed financing through sovereign wealth funds. The review finds that while these investments have contributed positively to agricultural exports and food supply diversification, they also pose significant risks, including land displacement, infrastructure inequities, and geopolitical vulnerabilities. Five key gaps in the literature are identified: comprehensive risk analysis, innovative financing mechanisms, the role of technology in sustainable agriculture, market forecasting, and policy analysis. The

review concludes with evidence-based recommendations for investors and policymakers to conduct risk assessments, explore blended finance models, and leverage technology for sustainable outcomes.

Keywords: GCC Investments, African Agriculture, Food Security, Economic Growth, Sustainability

Introduction:

The nations that comprise the Gulf Cooperation Council (GCC), Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates (UAE), are characterized by their desert climates, limited water resources, and restricted arable land (FAO, 2017b; GCC Stat, 2020; Woertz, 2015). The countries in this region are further characterized by their wealth, primarily derived from fossil fuels and natural gas, which fosters rapid economic growth (Zaidan et al., 2019). However, these countries faced a significant challenge in ensuring food security as defined by the World Food Summit in 1996 indicating that "food security, at the individual, household, national, regional and global levels is achieved when all people, at all times, have physical and economic access to sufficient, safe and nutritious food to meet their dietary needs and food preferences for an active and healthy life" mainly due to arid climates and scarce water resources (Ben Hassen & El Bilali, 2019; Saif et al., 2014). The GCC's food industry is highly reliant on imports, making it vulnerable to disruptions in those imports (Devesh et al., 2023). That can secure long-term food supplies and reduce dependency on volatile global markets. As a result, these nations have increasingly turned their attention towards agricultural investments in more fertile regions, particularly in North and East Africa. Countries like Sudan and Ethiopia were early targets due to large tracts of fertile land and lower costs (Woertz, 2020). This strategic move aims to secure a stable food supply while also contributing to economic development in the host countries (Woertz et al., 2008).

In general, the GCC countries are among the wealthiest nations due to their abundant oil resources. However, they have been unable to invest sufficiently in domestic agriculture to achieve food security, primarily due to their harsh climate. So far, four main models have been pursued by the Arab world in general, and by the GCC countries in particular, to ensure food security in the region. The first model involved investing in agriculture in Europe and the United States, primarily due to the political stability of those regions. The second approach focused on investing in domestic agriculture, as seen in countries such as the United Arab Emirates and Saudi Arabia, which have allocated substantial capital and deployed advanced technologies. The third model centers on the Arab Authority for Agricultural Investment and Development

(AAAID), which aims to establish a common fund to finance agricultural investment and development across the Arab world. The fourth strategy involves country-led initiatives to invest in geographically accessible African nations, such as Sudan, Ethiopia, and Kenya.

Diverse social, economic, and environmental effects might result from foreign agricultural investments. When properly managed, these investments can serve as a tool for development, creating job opportunities, enhancing rural infrastructure,

connecting smallholder farmers to international markets, introducing productivity-boosting technologies, and facilitating access to financing for farmers (Grote, 2018). The rationale behind the GCC's agricultural investments in Africa was multifaceted. Agricultural investment in Africa and other regions, initiated by GCC countries, was planned in response to the "food self-sufficiency" initiative, which relied on unsustainable groundwater use. These resources proved unsustainable during the 1975-1976 world food crisis (Woertz, 2020). Primarily, it serves as a hedge against food supply risks and global market price volatility. Additionally, it offers GCC countries an opportunity to diversify their economies, which are heavily reliant on oil revenues. The investments also align with the broader goals of enhancing bilateral relations and fostering economic cooperation with African nations (Alnafissa et al., 2022).

However, these investments are not without their complexities. They raise questions about the sustainability of such practices, the impact on local communities, and the geopolitical implications. Moreover, the investments must navigate the intricate landscape of African agricultural policies, market dynamics, and infrastructure challenges (Africa Development Bank, 2021). Studies affirmed that displacement of local communities and accusations of "land grabbing" led to reputational risks for GCC investment in African countries (Kohnert, 2023).

Despite the growing scale of GCC agricultural investments in Africa, the literature remains fragmented. Studies tend to focus on individual countries (particularly Sudan and Ethiopia), specific investment models, or narrow dimensions such as food security or land tenure, with few attempts to synthesize the full landscape of motivations, outcomes, and challenges across North and East Africa as a whole. This gap in consolidated, regionally comprehensive analysis constitutes the core problem this review addresses. The following objectives guide the study: (1) to document the historical evolution and current state of GCC agricultural investments in North and East Africa; (2) to analyze the motivations, investment models, and strategies employed by GCC countries; (3) to evaluate the documented economic, social, and environmental outcomes of these investments; (4) to identify critical gaps in the existing literature; and

(5) to provide evidence-based recommendations for investors and policymakers to enhance the sustainability and equity of these investments.

The review is structured to provide a systematic analysis of the literature, beginning with an overview of the current state of GCC agricultural investments and then discussing the methodologies employed in the studies. It then presents the key findings, outlines the gaps in the literature, and concludes with recommendations for investors and policymakers. The study's contributions and significance are highlighted, along with potential avenues for further research to enhance the body of knowledge on this subject.

Methodology:

This study employs a scoping review methodology, following the PRISMA-ScR (Preferred Reporting Items for Systematic Reviews and Meta-Analyses extension for Scoping Reviews) guidelines (Tricco et al., 2018). A scoping review is appropriate here because the primary aim is to map the existing literature, identify key concepts and research gaps, and synthesize evidence across a broad and heterogeneous body of work on GCC agricultural investments in Africa, rather than to answer a single narrow clinical or empirical question. This approach ensures transparency, replicability, and scholarly rigor.

The following research questions guide this review: (1) What are the primary motivations driving GCC countries to invest in agricultural land and production in North and East Africa? (2) What economic, social, and environmental outcomes have been documented in the literature? (3) What challenges and risks are associated with these investments? (4) What gaps remain in the existing literature that warrant further investigation? These questions frame the scope of the review and anchor the subsequent synthesis, gap analysis, and recommendations.

Literature Search and Selection:

A systematic search was conducted across three major academic databases, Scopus, Web of Science, and JSTOR, supplemented by grey literature sources including FAO reports, World Bank publications, IFPRI policy briefs, and reports from regional investment authorities. The search was conducted between January and July 2024, covering publications from 2000 to 2024, with seminal works from the 1990s included where directly relevant to the historical context. The following keyword combinations were used: (“GCC” OR “Gulf Cooperation Council”) AND (“agricultural investment” OR

"agri-investment" OR "farmland acquisition" OR "land grab") AND ("Africa" OR "East Africa" OR "North Africa" OR "Sudan" OR "Ethiopia" OR "Morocco" OR "Egypt"). Additional terms included "food security," "foreign direct investment," "sovereign wealth fund," and "land lease." Sources were included if they: (a) directly addressed GCC or Arab Gulf state agricultural investment in Africa, (b) examined food security policies of GCC countries with an external investment dimension, or (c) analyzed socioeconomic or environmental impacts of large-scale land acquisitions in the study region. Sources were excluded if they focused solely on domestic Gulf agriculture without an external investment dimension, or addressed African agriculture without reference to Gulf or Arab investment. The initial search returned over 200 records; after screening titles and abstracts for relevance and removing duplicates, 34 sources were retained for full-text review and synthesis.

Data Extraction and Synthesis:

For each included source, the following data were extracted and recorded in a standardized form: author(s), year of publication, country/region of focus, methodology employed, key findings, and relevance to the four guiding research questions. Sources were then grouped thematically into five categories: (1) motivations and drivers of GCC agricultural investment, (2) historical evolution and investment models, (3) economic and food security outcomes, (4) social and environmental impacts and risks, and (5) policy frameworks and future trajectories. This thematic synthesis enabled cross-source comparison and the identification of converging and diverging perspectives in the literature.

Critical Appraisal

Each included source was critically appraised for methodological quality, reliability, and relevance. Peer-reviewed articles and book chapters were assessed using standard academic quality indicators (clarity of methodology, validity of conclusions, and rigor of evidence). Grey literature sources, including industry reports from Fitch Solutions, Alpen Capital, and the African Development Bank, were assessed for institutional credibility, data transparency, and currency. Sources that relied heavily on anecdotal evidence without verifiable data were noted as lower-confidence inputs and treated as contextual rather than evidentiary. This tiered appraisal approach ensures that the review's conclusions are grounded in the strongest available evidence.

Analysis and Interpretation

The synthesized data were analyzed to identify recurring patterns, areas of agreement and disagreement, and understudied dimensions. The analysis proceeds deductively from the four research questions and inductively from themes that emerged from the literature. Where quantitative data on investment volumes, land areas, and trade flows were reported in multiple sources, these were cross-referenced to assess consistency. Discrepancies between sources are noted and discussed. The analysis culminates in a structured identification of five key gaps in the literature (presented in Table 2), each linked to a specific research question and a proposed future research direction.

Literature Review:

The following literature review table (Table 1) encompasses a diverse range of scholarly works that explore the multifaceted aspects of agriculture in the Gulf Cooperation Council (GCC) region and its broader interactions with the African continent. The table presents a synthesis of key findings from various authors who have explored topics ranging from the impact of foreign direct investment on agricultural exports to strategic measures for enhancing food security and agricultural productivity. The methodologies employed in these studies vary, encompassing empirical analyses, industry reports, policy reviews, and market forecasts, reflecting the comprehensive nature of research in this domain. The publications' time frame spans from 2008 to the projected data of 2024, offering both historical insights and a future outlook. This curated collection of literature serves as a critical resource for understanding the dynamic interplay among economic policies, technological advancements, and agricultural practices in shaping the GCC's agricultural landscape and its global linkages.

Table 1. Agricultural Dynamics in the GCC and Africa: An Empirical and Policy-Oriented Review

Author(s)	Title	Key Findings	Methodology	Year
Marzocchi & Arribas Cámara (2025)	Land Grabbing and Development: The Case of Ethiopia	This study assesses the impact of land grabbing on Ethiopia's development targeting the economic, environmental, and quality-of-life dimensions. The negative impacts of Saudi Star Agriculture Development PLC's development, including forced relocations of rural populations, land loss, and water shortages, have been reported. Additionally, environmental problems such as deforestation, severe flooding, decreased soil quality, and soil compaction were severe. However, land grabbing demonstrated positive aspects regarding employment and technology transfer.	The authors utilized data and narratives from published articles and unpublished reports of governmental and nongovernmental organizations, as well as personal observations.	2025
Hallam (2011)	International investment in developing country agriculture—issues and challenges	High local farmer displacement; limited spillover effects in technology transfer and local food security; adverse environmental impacts such as chemical contamination, land degradation, and depletion	It summarizes the existing known facts from different sources (literature, investors, and other stakeholders).	2011

Author(s)	Title	Key Findings	Methodology	Year
		of water resources; and limited labor rights and poor working conditions.		
CIRS (2014)	GCC States' Land Investments Abroad: The Case of Ethiopia. CIRS Summary Report.	The findings concluded that acquiring agricultural land in Ethiopia and Cambodia is a poor and risky strategy for securing food supplies for the GCC states.	The research was done by using data from fieldwork in Ethiopia.	2014
Alnafissa et al. (2022)	Impact of Gulf Cooperation Countries' Foreign Direct Investment on Sudan's Agricultural Exports	Analyzed the positive impact of the GCC's FDI on Sudan's agricultural exports, highlighting the role of exchange rates.	Empirical analysis using Sustainability metrics	2022
Africa Development Bank (2021)	Raising Africa's agricultural productivity	Discussed strategies for increasing agricultural productivity in Africa to ensure food security.	Policy review	2021
BMI- Fitch Solutions company (2023)	GCC Food Security: The UAE Seeks to Mitigate Food Supply Risks through Land Acquisitions, Trade Deals, and Domestic Agtech.	Explored the UAE's approach to enhancing food security through international land acquisitions and technology.	Market analysis	2023
Mapanje et al. (2023)	Financing Sustainable Agriculture in Sub-Saharan Africa: A Review of Policies	Reviewed policies for financing sustainable agriculture, with a focus on sub-Saharan Africa.	Policy analysis	2023
Oyelami et al. (2022)	ICT and agricultural sector performance: empirical evidence from sub-Saharan Africa	Examined the impact of ICT on agricultural performance in sub-Saharan Africa.	Empirical evidence review	2022
Odusola (2021)	Policies and Programmes for an	Investigated policies and programs aimed at	Policy analysis	2021

Author(s)	Title	Key Findings	Methodology	Year
	Agricultural Powerhouse in Africa	transforming Africa into an agricultural powerhouse.		
Statista (2024)	Agriculture Market Forecast in the GCC	Provided forecasts for the agriculture market in the GCC region.	Market forecast	2024
Woertz et al. (2008)	Potential for GCC Agro investments in Africa and Central Asia	Assessed the potential for GCC agricultural investments in Africa and Central Asia.	Descriptive analysis	2008
Lindsay (2012)	Compulsory Acquisition of Land and Compensation in Infrastructure Projects	Analyzed the implications of land acquisition for infrastructure projects on agriculture.	Policy analysis	2012

History of GCC Countries' Agricultural Investments:

The Gulf Cooperation Council (GCC) countries have long recognized the strategic importance of securing food supplies, given inherent constraints such as limited arable land and water scarcity (Woertz et al., 2008). This has led to a concerted effort to invest in agricultural sectors abroad, particularly in regions with which they share historical and sociopolitical ties. Countries such as Sudan, Ethiopia, Kenya, Uganda, and Tanzania were early targets due to their large tracts of fertile land and lower costs (Alnafissa et al., 2022; CIRS, 2014; Tanyeri-Abur & Hag Elamin, 2011).

Following the 1972-1975 world food crisis, some GCC countries, including Saudi Arabia and the United Arab Emirates, began investing heavily in domestic agricultural production to ensure food self-sufficiency, often utilizing unsustainable aquifers. However, this proved impossible during the 2007/2008 food crisis, when the aquifers were almost running out (Woertz, 2020). Post the 2008 global food crisis, there was a marked strategic shift in the investment approach of GCC countries. The crisis highlighted the vulnerabilities inherent in food supply chains and the risks associated with excessive reliance on global markets for essential food commodities. In response, GCC countries intensified their efforts to secure food by making direct investments and

acquiring agricultural land, primarily in North and East African nations (Aldhaheri, 2023; Benazza, 2024; Woertz et al., 2008).

These investments have been diverse, encompassing a range of crops and leveraging various technologies to optimize agricultural output. The primary motivation behind these investments has been to bolster food security in the GCC region, which is geographically closest. However, the investments have also been driven by economic considerations, aiming to capitalize on the agricultural potential of recipient countries while fostering closer economic ties (Alnafissa et al., 2022).

Sudan, in particular, has been a significant recipient of GCC agricultural investments. The country's agricultural sector, pivotal to its economy, has historically accounted for a substantial share of Sudan's foreign exchange earnings through the export of field crops, livestock, and forest products. Investments from GCC countries have been found to boost Sudan's agricultural exports, with the exchange rate playing a critical role in investment decisions (Alnafissa et al., 2022). Other countries, such as Ethiopia, Morocco, and Tanzania, among others, were also receiving foreign direct investment in agricultural areas from GCC countries (Benazza, 2024).

These investments have had varying impacts on regional agricultural development and food security. According to some studies, GCC investments have increased agricultural exports from countries such as Ethiopia and Sudan. However, concerns remain about the broader socioeconomic implications, particularly regarding land grabbing and community displacement (Alnafissa et al., 2022; CIRS, 2014). Furthermore, the living conditions of local inhabitants are not always improved when foreigners acquire land and agricultural resources. Local food producers, such as small-scale farmers and herders, often lose access to their land, leaving them vulnerable to hunger and food insecurity (Aab¯ & Kring, 2012). In certain countries, such as Sierra Leone and Mozambique, foreign investors have disregarded the rights of landowners and failed to fulfil their obligations to construct infrastructure for the local community (Aab¯ & Kring, 2012). Furthermore, the local communities' nomadic group is frequently disregarded. Therefore, the majority of disputes and public protests caused by foreign agricultural investments in African nations are similar to those that occurred in Sudan (McGinnis & Fredrick, 2019). Furthermore, the impact of foreign agricultural investment on natural resource depletion, such as fresh water and soil, shall not be ignored (Rakotoarisoa, 2011).

Although the GCC states rank higher in the food security index than nations known for their food production, such as Brazil and India, the relevance and sustainability of this ranking remain questionable. Hence, the food security issue remained a viable agenda item in these states. Following the COVID-19 pandemic, various states initiated diverse strategies to address the problem, utilizing both domestic and foreign investment. Saudi Arabia, Qatar, and the United Arab Emirates continued to invest in food, focusing on both domestic and international markets (Economist Impact, 2022). For instance, the UAE government launched the National Food Security Strategy in 2018, aiming to increase production of strategic food products by 100,000 tonnes by 2051. This strategy encompasses both domestic investment in vertical farming, which primarily focuses on fruit and vegetable production, and contract farming and the acquisition of arable land from East African countries such as Sudan and Ethiopia, among other countries (BMI- Fitch Solutions company, 2023; Nowacka, 2022; U.AE, 2024). Similarly, the Kingdom of Saudi Arabia is taking action by investing in domestic agriculture, particularly in dairy production and other agricultural products (El-Dukheri, 2024).

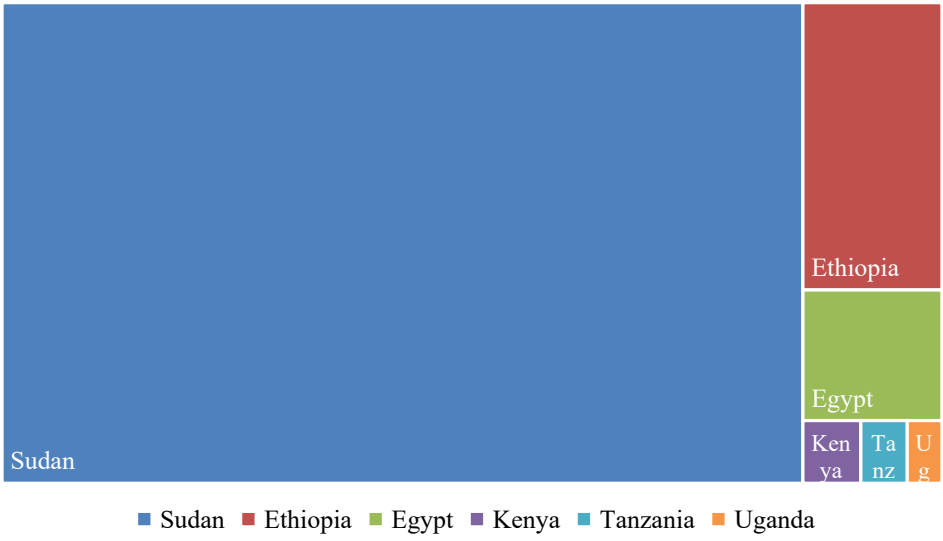


Figure 1: Estimated GCC Agricultural Investment by Host Country (Cumulative Commitments, 2000–2024)

Research Gaps in GCC-Africa Agricultural Development

Table 2 presents a critical examination of the existing gaps in the literature regarding the development of the agricultural sector within the GCC and its investment footprint in Africa. This analysis underscores the areas where further research could significantly enhance our understanding and operational strategies. The table identifies five key areas where the current body of literature falls short: comprehensive risk analysis, financing mechanisms, the role of technology, market forecasts, and policy analysis. Each gap is described, along with the potential impact of addressing it on the agricultural sector. By highlighting these areas, Table 2 serves as a roadmap for future research endeavours, aiming to fill the identified voids with robust empirical evidence and analytical rigor. Addressing these gaps holds the promise not only of advancing academic discourse but also of providing actionable insights for investors, policymakers, and practitioners seeking to foster sustainable agricultural development and food security in the GCC and Africa.

Table 2. Gap in Literature

Gap in Literature	Description	Potential Impact of Addressing the Gap
Comprehensive Risk Analysis	Limited studies provide a comprehensive risk analysis of GCC agricultural investments in Africa, including geopolitical and transport security risks1.	A thorough risk analysis could help investors and policymakers make informed decisions and mitigate potential investment risks.
Financing Mechanisms	There is a need for more research into innovative financing mechanisms, particularly given the multibillion-dollar financing gap in African agribusiness.	Understanding financing mechanisms could unlock new investment opportunities and drive sustainable agricultural growth.
Role of Technology	The impact of FinTech and other technologies on sustainable agriculture financing in sub-Saharan Africa remains poorly documented.	Insights into technology's role could lead to more efficient agricultural practices and improved food security.
Market Forecasts	Projections and forecasts for the agriculture market in the GCC are scarce, with limited data available for future planning.	Accurate market forecasts are crucial for strategic planning and ensuring food security in the GCC region.

Gap in Literature	Description	Potential Impact of Addressing the Gap
Policy Analysis	There is a lack of detailed analysis of policies and programs aimed at transforming Africa into an agricultural powerhouse.	Policy analysis could guide the development of effective strategies for agricultural investment and growth.

Types of investment models by GCC countries in Eastern African countries

There are three types of major investment models implemented by GCC countries, which are discussed as follows:

Government-to-government deals involve strategic partnerships that include long-term leases and infrastructure development. It is a strategic investment partnership in which a GCC government directly signs agreements with another sovereign government, often involving long-term land leases, joint infrastructure projects, and resource access agreements. The primary objective is to mitigate market risks and secure political backing for sensitive investments, particularly in agriculture and energy. Many GCC countries have increasingly pursued government-to-government investment models in the agriculture sector.

Sudan (Saudi Arabia–Sudan Agricultural Land Lease in 2009), the United Arab Emirates–Sudan (Al Ain Farms, 2012), and Kenya, which hosts the Qatar–Kenya Food Security Deal (2010), are the most notable East African nations that have attracted investments. Furthermore, there are government-to-government investments in Ethiopia from Saudi Arabia and the United Arab Emirates, such as those from Al Dahra Agriculture of the United Arab Emirates and Saudi Star Agricultural Development PLC of Saudi Arabia (Lavers, 2012; Marzocchi & Arribas Cámara, 2025). These models are particularly prevalent in resource management, food security, and strategic land acquisition (El-Dukheri, 2024).

Long-term leases, typically ranging from 20 to 99 years, are a common tactic employed by GCC nations to acquire land in Eastern Africa for food production to meet their domestic needs. Even though these deals are intended to benefit both parties financially, they are often contentious due to concerns about sustainability, fairness, and local impacts. Saudi Star Agricultural Development (Ethiopia), which is supported by Saudi investors and has long-term leases for rice cultivation, and Emirates Investment Group (in Sudan and Ethiopia) are two examples of such arrangements (The Oakland Institute, 2011).

Infrastructure Joint development model

This refers to the construction of roads, irrigation systems, storage facilities, and transportation networks in the host nation as part of GCC foreign agricultural investments, particularly under government-to-government (G2G) agreements. In addition to meeting the investor's needs for agricultural output, these facilities frequently support regional growth. Usually, the investor, the GCC government, or state-backed businesses share or finance the expense, occasionally in return for production rights or land leases. Saudi Star in Ethiopia, Al Dahra Agriculture of the United Arab Emirates in Egypt, and the port and agricultural agreement between Qatar and Kenya, proposed in 2010 to develop Lamu port in exchange for 40,000 hectares of farmland, but not finalized due to local opposition, are examples of such investments (Aldhaheri, 2023; Hartley, 2009).

State-backed financing model

This is a model in which GCC governments channel investments into agriculture abroad through sovereign wealth funds (SWFs), government-controlled investment agencies, or state-owned enterprises, to achieve strategic objectives such as food security, geopolitical influence, and economic diversification. Across the documented cases, government-to-government agreements and long-term land leases together account for the majority of investment activity, with SWF-backed equity, off-take/contract farming, and PPP/joint-venture arrangements making up the remainder (Figure 2). Table 3 summarizes investors from GCC countries, hosting countries, major focus crop types, and the types of models followed.

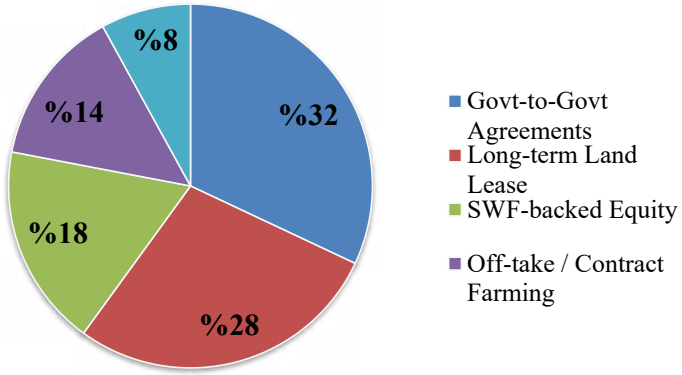


Figure 2. Distribution of GCC Agricultural Investment Models in North and East Africa (% of documented investments). Source: Authors' synthesis based on reviewed sources.

Table 3. GCC countries' investment model with their host countries in East Africa

GCC Country	Investor	Host Country	Product	Model	Reference
Saudi Arabia	SALIC	Sudan, Ethiopia	Rice, Wheat	SWF-backed investments	(The Oakland Institute, 2011)
UAE	Al Dahra	Sudan, Egypt	Forage, Wheat	State-owned enterprise	(Aldhaheri, 2023)
Qatar	Hassad Food	Sudan	Grain, Livestock	SWF-backed projects	(Hartley, 2009)

In addition to the above-mentioned models, there are also other types of investment models followed by GCC countries in East African countries, such as the mutual strategic interests (e.g., food security for the GCC, economic development for the host country), private-sector-led investments (such as agribusiness firms and sovereign wealth funds of Qatar Investment Authority, Saudi Agricultural and Livestock Investment Company - SALIC), and public-private partnerships (PPPs), which are a blend of state support with private sector efficiency. SALIC of Saudi Arabia was established in 2011 by the government to invest in agriculture worldwide. However, its journey proved most fruitful in East African countries like Sudan and Ethiopia, where it controlled rice production, and the Kingdom has doubled its investment in Sudan. In doing so, Saudi companies developed the ability to manage the supply chain and shield the nation from exogenous shocks (El-Dukheri, 2024).

Status of GCC countries' agricultural FDI in East African countries

There is no precise and up-to-date information on the amount of agricultural FDI flowing into East African nations, despite past investments and current agreements. The UAE's ADQ portfolio companies, including Al Dahra, have documented investments across farming operations in Sudan, Ethiopia, Egypt, and Serbia, though consolidated country-specific figures for Ethiopia alone are not publicly available (Calabrese, 2024). In a similar vein, GCC nations have contributed at least $53 billion to Sudanese agriculture in the last decade. Saudi Arabia has invested $35.7 billion, primarily to support 250 agricultural projects. With additional instalments to follow, Saudi Crown Prince Mohammed Bin Salman pledged to provide $3 billion to the Sudan Investment

Fund projects (Middle East Monitor, 2023). With billions of dollars in government-sponsored investments, such as those from SALIC, Saudi Arabia has expanded its scope by purchasing or leasing large tracts of land not only in East Africa but also globally for agricultural production. Diversifying the nation's food supply is the primary goal to ensure food security. While the program's negative impact is a rise in food prices, it has been acknowledged for its good impact in increasing food security and reducing reliance on domestic production (El-Dukheri, 2024).

Status of GCC Countries' Agricultural FDI in North African Countries

North Africa represents a strategically distinct but equally important arena for GCC agricultural investment, yet it remains significantly underrepresented in the existing literature relative to its actual investment footprint. The region's proximity to the Arabian Peninsula, well-developed port infrastructure, and large expanses of irrigable land, particularly in Egypt, Morocco, and Sudan's northern Nile corridor, make it a natural complement to East African investment strategies. Unlike the more frontier-market character of Ethiopian and Kenyan investments, North African engagements tend to involve more established institutional frameworks, stronger bilateral diplomatic ties, and greater integration into GCC food supply chains.

Egypt is the most prominent North African recipient of GCC agricultural investment. Unlike in Sudan and Ethiopia, much of this investment is concentrated in two long-running desert land-reclamation schemes: Toshka, in Egypt's Western Desert, and Sharq El-Oweinat. On the Toshka scheme, the UAE's Al Dahra Agriculture holds approximately 120,000 acres, while Saudi Arabia's Al-Rajhi Investments and Kingdom Holding Company (the latter subsequently reduced) hold substantial additional acreage; on Sharq El-Oweinat, the UAE's Jenaan and Al Dahra, alongside Saudi Arabia's Jannat, hold further large tracts (Henderson, 2021). These holdings are used primarily to cultivate alfalfa and, to a lesser extent, wheat, for export back to Gulf livestock and food supply chains. More recently, Al Dahra and the Abu Dhabi Exports Office (ADEX) signed a separate $500 million, five-year wheat trade-finance agreement with the Egyptian government in 2023 to supply Egypt with imported milling wheat, a transaction distinct from the earlier land-based investments, illustrating a parallel and growing emphasis on trade finance alongside land acquisition (Suwaidi, 2024). Morocco's relationship with GCC countries in agriculture is, by contrast, documented primarily as a trade relationship rather than direct investment: Saudi Arabia, the UAE, and Qatar are established importers of Moroccan citrus, tomatoes, and olive oil, but the literature reviewed for this study did not surface confirmed instances of GCC equity investment in Moroccan

farmland or agri-processing infrastructure comparable to the Egyptian or Sudanese cases. Tunisia presents a smaller-scale but verifiable example of GCC private equity entering North African agriculture: Gulf Capital, an Abu Dhabi-based private equity firm, invested in CHO Group, Tunisia's largest olive oil exporter, to support the expansion of its olive groves and the integration of exports. Libya, despite holding substantial groundwater reserves and underutilised arable land, has attracted little documented GCC agricultural investment; the literature attributes this primarily to the prolonged political instability following 2011, which has deterred the kind of large-scale, long-horizon capital commitments seen in Egypt and Sudan.

A key distinguishing feature of North African investments compared to their East African counterparts is the longer time horizon of the land-based holdings, several of which date to the early 2000s and predate the wave of Sudanese and Ethiopian deals documented in this review. Egypt's case in particular shows GCC investors operating on two parallel tracks: direct land ownership for export-oriented fodder and grain production, and separate government-to-government trade finance agreements for wheat imports, a combination not clearly documented elsewhere in the region. Table 4 below summarizes the documented GCC agricultural investments in North Africa by country, investor, product focus, and investment model; entries are limited to cases for which a specific, attributable source could be identified during the review.

Table 4. GCC Agricultural Investment in North Africa: Selected Examples

Host Country	GCC Country	Investor / Entity	Product / Focus	Investment Model	Reference
Egypt (Toshka)	UAE / Saudi Arabia	Al Dahra; Al-Rajhi; Kingdom Holding	Alfalfa, Wheat	Direct land ownership (≈120,000+ acres)	(Henderson, 2021)
Egypt (national)	UAE	Al Dahra / ADEX	Wheat (imported milling wheat)	Govt-backed trade finance ($500M, 5-yr)	(Suwaidi, 2024)
Egypt (Sharq El-Oweinat)	UAE / Saudi Arabia	Jenaan; Al Dahra; Jannat	Fodder, Wheat	Direct land ownership (groundwater-irrigated)	(Henderson, 2021)
Tunisia	UAE	Gulf Capital (private equity)	Olive oil (CHO Group)	Private equity stake (~$22M)	(Mubasher Info, 2023)

Host Country	GCC Country	Investor / Entity	Product / Focus	Investment Model	Reference
Morocco	Saudi Arabia / UAE / Qatar	N/A—importers, not investors	Citrus, Tomatoes, Olive oil	Trade relationship only; no confirmed GCC equity investment identified	(HAC Team, 2026)
Libya	—	No confirmed investor identified	N/A (potential cereals, per general literature)	No documented GCC deals; political instability cited as barrier	Authors' synthesis

Future Trends of Investments:

The trajectory of agricultural investments by the Gulf Cooperation Council (GCC) countries is poised to undergo significant evolution in the coming years. The overarching goal remains the same: securing food supplies for the GCC countries. However, the strategies to achieve this objective are becoming increasingly diverse. There is a discernible shift towards investments that go beyond primary agriculture to encompass trading houses and logistical infrastructure (BMI- Fitch Solutions company, 2023). In general, GCC agricultural investment abroad is diversifying, becoming more strategic, sustainable, and tech driven. Moreover, future focus is likely to be on climate-resilient agriculture, digital platforms, and biosecurity, ensuring both food security and return on investment.

Internal demographic and economic factors are also shaping the GCC's investment landscape. The region's population continues to grow, and with it, the demand for food. Concurrently, domestic agricultural productivity is facing challenges due to natural constraints, such as water scarcity and limited arable land (Alpen Capital, 2023). These factors are expected to contribute to an increase in agricultural investments abroad as GCC countries seek to ensure their food security (Statista, 2024).

Moreover, recent shocks to global agricultural trade flows, such as the COVID-19 pandemic, the Russia-Ukraine war, and India's rice export restrictions, have highlighted the GCC's external vulnerabilities and reinforced the importance of food security on the policy agenda (BMI- Fitch Solutions company, 2023). In response, the GCC countries are

exploring ways to mitigate these risks through land acquisitions, trade deals, and the adoption of domestic agricultural technologies (BMI- Fitch Solutions company, 2023).

The future of GCC agricultural investments is also likely to be influenced by advancements in food security. Leveraging technology for precision agriculture and optimizing supply chains will play a pivotal role in shaping the industry's future (Alpen Capital, 2023). There is growing interest in plant-based and alternative protein products that cater to health-conscious consumers, reflecting a broader trend towards sustainability and health (Alpen Capital, 2023). In a lump-sum approach, GCC countries are adopting a forward-looking approach to agricultural investment and food security, with an emphasis on advanced value-chain management. This approach focuses on strengthening control over the entire agri-food supply chain, from production to distribution, to enhance efficiency, reduce risks, and secure a consistent supply. Second, food diplomacy and multilateral cooperation emphasize active engagement and the fostering of multilateral partnerships to safeguard global trade frameworks and ensure uninterrupted food flows amid geopolitical uncertainties. Thirdly, addressing malnutrition and food-related health issues involves tackling both undernutrition and overnutrition (such as obesity) through comprehensive food policies, public health initiatives, and responsible food production strategies. Lastly, ensuring food accessibility for vulnerable populations: implementing inclusive policies and investment strategies to guarantee affordable, nutritious food access for vulnerable and low-income groups within and outside the GCC.

Guidelines for Positive Contributions

Agricultural investments, particularly in the context of the Gulf Cooperation Council (GCC) countries' direct investment in North and East Africa, must be designed to ensure positive contributions to food security and agricultural development. The focus on smallholder agriculture is pivotal, as it plays a central role in food security and nutrition. Smallholder farmers, who often form the backbone of rural economies, require support through enabling policies, effective governance structures, and access to markets, as well as training, research, technology, and farm support services to thrive (Osabuohien, 2020).

Enabling Policies and Governance: Creating an enabling environment for agricultural investments involves formulating policies that support sustainable farming practices, climate-smart agriculture, and equitable market access. These policies

should aim to mitigate market risks and address market power imbalances, thereby fostering a more inclusive agricultural sector (Lindsay, 2012).

Access to Markets and Training: Access to markets is crucial for smallholder farmers to sell their produce at fair prices. Investments should facilitate this access by improving infrastructure, reducing transaction costs, and providing farmers with the necessary business skills. Training programs are essential for enhancing farmers' ability to meet market standards and adopt new technologies (Africa Development Bank, 2021).

Research and Technology: Investments in research and technology can help address challenges related to land management, climate change, resource depletion, and biodiversity. The introduction of drones, satellite photography, IoT-based sensors, biotechnology, artificial intelligence, big data, and blockchain can revolutionize the agricultural landscape, making it more resilient and productive (Oyelami et al., 2022).

Farm Support Services: Farm support services, including advisory services, capacity building for adaptation, and regional food market integration, play a crucial role in enhancing food security. These services should be tailored to the needs of smallholder farmers, ensuring that they contribute to both food security and ecosystem services (Wiggins & Keats, 2014).

Designing Investments for Maximum Benefits: Investments should be carefully designed to maximise benefits for food security and nutrition while minimising associated risks. This involves planning, monitoring, and evaluating investment incentives for responsible investment in agriculture and food systems. The design process should consider the trade-offs and synergies between ecosystem services and agricultural productivity (FAO, 2014, 2017a).

Conclusion and Recommendations:

The literature review indicates that GCC countries' direct agricultural investments in North and East Africa have the potential to contribute to food security and economic growth significantly. However, challenges such as geopolitical risks, financing gaps, and the need for sustainable practices must be addressed. In addition to these, there are other challenges, such as land acquisition controversies, where the displacement of local communities and accusations of "land grabbing" have led to reputational risks. Furthermore, operational difficulties that arise from poor infrastructure, political instability, and limited local expertise hinder productivity in

some target countries. Investors in the GCC must take a calculated, risk-averse, and cooperative strategy to guarantee long-term, win-win results, such as:

Conduct Comprehensive Risk Assessment: To examine the operational, financial, environmental, and sociopolitical risks associated with African agriculture, GCC investors should conduct a comprehensive risk assessment. This entails being aware of market volatility, climatic concerns, political stability, and land tenure systems. Effective risk reduction techniques will improve long-term viability and investment security.

Innovative Financing Mechanisms: GCC nations should explore cutting-edge financial options, such as impact investing, blended finance, concessional loans, and public-private partnerships, to close the funding gap in African agribusiness. These systems can attract a range of funding sources and foster sustainable agriculture.

Leveraging Technology for Sustainability and Productivity: Numerous opportunities exist to enhance sustainability and productivity through advanced agricultural technologies, including digital platforms, supply chain innovations, precision farming, and climate-smart practices. Initiatives to increase capacity and adopt technology that empowers regional farmers and agribusinesses should be given top priority by GCC investors.

Market Intelligence and Forecasting: Making well-informed investment decisions requires the development of reliable market analysis tools and precise forecasting systems. To comprehend demand patterns, price fluctuations, and regional trade dynamics, GCC investors are increasingly investing in market research, data analytics, and predictive modeling.

Advocacy and Policy Interaction: To create investment frameworks and agricultural policies that are supportive, active interaction with African officials and regional organizations is crucial. To promote a favorable business climate, GCC investors should collaborate to formulate policies, advocate for clear laws, and participate in multi-stakeholder discussions.

Contributions and Significance of the Study

This study makes several distinct contributions to the existing body of knowledge. First, it provides the first regionally comprehensive scoping review that explicitly covers

both North and East Africa together, a geographic pairing that has rarely been treated as a unified analytical unit in prior literature. Most existing studies focus on a single country (typically Sudan or Ethiopia), leaving the comparative and regional dynamics underexplored. Second, this review synthesizes three distinct types of evidence: peer-reviewed empirical studies, institutional policy reports, and investment industry analyses, offering a more complete picture than reviews that rely solely on academic literature. Third, by applying a structured five-category framework (motivations, investment models, economic outcomes, social and environmental impacts, and policy trajectories), this review provides an organizing schema that future researchers can build upon. Fourth, the identification of five specific literature gaps, comprehensive risk analysis, financing mechanisms, the role of technology, market forecasting, and policy analysis, provides a concrete roadmap for future empirical and policy-oriented research. The significance of this study lies in its capacity to serve as a reference point for investors designing entry strategies, policymakers crafting bilateral agricultural agreements, and researchers scoping new studies in this rapidly evolving field.

Avenues for Further Research

The following topics could be investigated in future studies to fill in the gaps in the literature and improve the body of knowledge for agricultural investment and policy:

Comprehensive Risk analyses:
Conduct in-depth risk analyses that account for geopolitical instability, climate variability, environmental degradation, and market volatility. These studies would provide a thorough grasp of the various risks affecting agricultural investments, particularly in regions vulnerable to natural and geopolitical changes.

Case Studies for Creative Financing Models in Action: Analyze cutting-edge, effective financing techniques used in African agriculture, including digital microlending platforms, blended finance, and impact investing. Documenting their idea, implementation, and measurable outcomes would offer concrete guidelines for replication or adjustment in similar circumstances.

The Role of Emerging Technologies: An analysis of how cutting-edge technologies can enhance the efficacy, accountability, and scalability of agricultural finance and investment. Precision agriculture technologies, artificial intelligence for predictive analytics, and blockchain for supply chain transparency are a few examples.

Long-term Market Forecasts: Develop robust forecasts for the Gulf Cooperation Council (GCC) agricultural industry that account for anticipated impacts from demographic shifts, policy changes, and climate change. Policymakers, investors, and development organizations should use these projections as a reference when creating future-proof plans.

Comprehensive Policy Analyses: Conduct thorough assessments of current agricultural policies to identify best practices for replication and gauge the success of ongoing projects. Policy frameworks would be improved by such assessments, ensuring they remain flexible in the face of new opportunities and challenges. Future studies could yield practical insights and evidence-based recommendations by addressing these research areas, empowering stakeholders, from private investors to policymakers, to make more resilient, impactful, and informed decisions in the agricultural sector.

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تقييم الاستثمار الزراعي المباشر لدول مجلس التعاون الخليجي في شمال وشرق أفريقيا

محمد الحبيب عطية [1]

رائدة عثمان [2,3]

تمارات شلا [2]

إيهاب فتح الرحمن [2,3]

شركة سكر كنانة، الخرطوم، السودان[1]

قسم الزراعة التكاملية، كلية الزراعة والطب البيطري، جامعة الإمارات العربية المتحدة، الإمارات العربية المتحدة[2]

معهد أسباير للبحوث في مجال الأمن الغذائي بالأراضي الجافة(ARIFSID) ، جامعة الإمارات العربية المتحدة، العين، الإمارات العربية المتحدة[3]

تاريخ الاستلام: 18-02-2026 تاريخ القبول: 12-07-2026

الملخص:

تستعرض هذه المراجعة الاستطلاعية (Scoping Review) استراتيجيات الاستثمار الزراعي لدول مجلس التعاون الخليجي في شمال وشرق أفريقيا، مع التركيز على انعكاساتها على الأمن الغذائي والتنمية الاقتصادية. وتسترشد المراجعة بأربعة أسئلة بحثية تتناول الدوافع والنتائج والتحديات والفجوات البحثية المرتبطة بهذه الاستثمارات. وباتباع إرشادات PRISMA-ScR، أسفر بحث منهجي في قواعد بيانات Scopus وWeb of Science وJSTOR، مدعوماً بالأدبيات الرمادية، عن تحديد 34 مصدراً خضعت للمراجعة الكاملة. وتُعزى استثمارات دول مجلس التعاون الخليجي الزراعية بشكل أساسي إلى الحاجة إلى تأمين إمدادات غذائية مستقرة وتنويع الاقتصادات التي تعتمد بشكل كبير على عائدات النفط. وتحدد المراجعة ثلاثة نماذج استثمارية رئيسية: الاتفاقيات الحكومية الثنائية، وعقود الإيجار طويلة الأجل للأراضي، والتمويل المدعوم من الدولة عبر صناديق الثروة السيادية. وتخلص المراجعة إلى أنه في حين ساهمت هذه الاستثمارات إيجاباً في الصادرات الزراعية وتنويع الإمدادات الغذائية، فإنها تنطوي أيضاً على مخاطر جوهرية، منها تهجير السكان، وعدم المساواة في البنية التحتية، والهشاشة الجيوسياسية. وتحدد المراجعة خمس فجوات رئيسية في الأدبيات، هي: التحليل الشامل للمخاطر، وآليات التمويل المبتكرة، ودور التكنولوجيا في الزراعة المستدامة، والتنبؤ بالأسواق، وتحليل السياسات. وتختتم المراجعة بتوصيات مستندة إلى الأدلة موجهة للمستثمرين وصانعي السياسات، تدعو إلى إجراء تقييمات للمخاطر، واستكشاف نماذج تمويل مختلطة، وتوظيف التكنولوجيا لتحقيق نتائج مستدامة.

الكلمات المفتاحية: استثمارات دول مجلس التعاون الخليجي، شمال وشرق أفريقيا، الأمن الغذائي، النمو الاقتصادي، الاستدامة.