Food and Agriculture Organization of the United Nations

SUSTAINABLE DEVELOPMENT GOALS

Food policy monitoring

in the Near East and North Africa region

Financing the transformation of agrifood systems for food security and nutrition

3rd Quarter 2025 | Bulletin

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CONTENTS

FIGURES

TABLES

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ABBREVIATIONS

ADAFSA	Abu Dhabi Agriculture and Food Safety Authority
ADIHEX	Abu Dhabi International Hunting and Equestrian Exhibition
ADQ	Abu Dhabi Developmental Holding Company
AFF	agriculture, forestry and fishing
AI	artificial intelligence
AOI	Agriculture Orientation Index
CBAM	Carbon Border Adjustment Mechanism
CRS	creditor reporting system
DAP	diammonium phosphate
EBRD	European Bank for Reconstruction and Development
EDF	Électricité de France
ESG	environmental, social and governance
EU	European Union
FAO	Food and Agriculture Organization of the United Nations
FDI	Foreign direct investment
FFPI	FAO Food Price Index
FIRA	Trust Funds for Rural Development, Mexico
FSN	food security and nutrition
GCC	Gulf Cooperation Council
GDP	gross domestic product
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit GmbH [German Agency for International Cooperation]
GoY	Government of Yemen

GWECCC	Global Water, Energy and Climate Change Congress
IFAD	International Fund for Agricultural Development
IFC	International Finance Corporation
IPC	Integrated Food Security Phase Classification
KFMB	Kuwait Flour Mills and Bakeries Company
MOCCAE	Ministry of Climate Change and Environment, United Arab Emirates
MoU	memorandum of understanding
NENA	Near East and North Africa
OAIC	Office Algérien Interprofessionnel des Céréales
ODA	official development assistance
OECD	Organisation for Economic Co-operation and Development
OOF	other official flows
PERSGA	Regional Organization for the Conservation of the Environment of the Red Sea and Gulf of Aden
ROI	return on investment
SBA	Sana'a-based Authorities, Yemen
SIDA	Swedish International Development Cooperation Agency
SME	small and medium-sized enterprise
SOFI	Near East and North Africa Regional Overview of Food Security and Nutrition
TIP	Transformational Impact Partnership
VAT	value added tax
WaPOR	water productivity through open-access of remotely sensed derived data
WOAH	The World Organisation for Animal Health

EXECUTIVE SUMMARY

The Near East and North Africa (NENA) region continues to face a fragile food security landscape, marked by extreme inequality between stable, resource-rich economies, and conflict-affected countries on the brink of famine. Price volatility, climate extremes and conflict-driven disruptions remain the dominant risks. It also documents how countries are adopting diverse policy measures and investments to manage supply shocks, improve resilience and advance food system transformation.

Concerning the global commodity markets, the FAO Food Price Index remained broadly stable at 130.1 points in August, yet prices were still well above pre-2020 averages. Fertilizer costs remained elevated, exerting upward pressure on production costs.

Within the NENA region, food consumer prices rose sharply, averaging 33.8 percent higher than in September 2024. Libya and Palestine experienced extreme inflation, 186.9 percent and 199 percent respectively, while the Sudan recorded a 58 percent increase. Lebanon, facing prolonged crises, saw food prices jump more than 20 percent. Although daily data suggest that acceleration has moderated in some countries, the level of prices remains well above historical averages, straining household purchasing power and access to nutritious diets.

Agricultural production prospects varied widely for the 2024/25 season. In North Africa, Tunisia reported above-average cereal harvests due to improved rainfall, while Morocco, Algeria and parts of Libya struggled with sustained heat anomalies during planting preparations. In the Levant, Lebanon's cereal production was 50 percent below average due to conflict and drought, while the Syrian Arab Republic's wheat harvest dropped by 60 percent, marking one of the weakest in a decade. In contrast, Egypt's irrigated agriculture supported relatively stable output, though rising temperatures remain a concern. Across much of the Arabian Peninsula, above-average heat combined with localized rainfall deficits aggravated risks for smallholder farmers and pastoralists.

For the 2025/26 season, wheat production in North Africa is projected to rise by 4.2 percent, reaching 17.3 million tonnes compared to 16.6 million tonnes in 2024/25. In contrast, Near East countries are projected to face a 10.4 percent decline in wheat production, falling from 8.7 million tonnes in 2024/25 to 7.8 million tonnes in 2025/26.

Food insecurity hotspots remain acute. In Palestine (Gaza), famine conditions were officially confirmed in mid-2025, with over 1.9 million people in Crisis or worse (IPC Phase 3+), including more than 640 000 in Catastrophe (IPC Phase 5). Humanitarian aid access remains severely constrained, while disease outbreaks and collapsing health services amplify mortality risks. In Yemen, conflict, economic decline and cuts in humanitarian assistance left more than half of the population in Crisis or worse. The Sudan also remains highly vulnerable, with conflict-damaged agriculture and reduced access to markets deepening household food insecurity.

Despite these pressures, governments across the NENA region pursued a range of policy responses in the third quarter. Algeria secured large wheat imports and expanded its cold storage capacity to stabilize markets. Egypt advanced renewable energy and climate finance initiatives, while expanding wheat procurement from domestic farmers. Jordan implemented major irrigation rehabilitation projects with the support of the European Union and increased barley subsidies for livestock farmers. Iraq promoted solar-powered irrigation, climate insurance and seed research to improve

resilience. Morocco strengthened grain reserves and achieved record onion exports, while Oman launched agricultural investment projects and hosted a food security forum. Lebanon negotiated concessional financing from the World Bank for its Green Agri-Food Transformation Project, aiming to rebuild value chains and irrigation infrastructure. The Gulf countries, including Qatar, Saudi Arabia and the United Arab Emirates, invested heavily in renewable energy, agri-tech and water security to advance long-term resilience strategies.

These national measures reflect the region's dual challenge: responding to immediate shocks, while also building more sustainable and climate-resilient food systems. Innovations such as climate-smart irrigation, renewable energy integration, digital monitoring systems and concessional financing for agrifood projects signal progress. However, uneven implementation, persistent subsidy distortions and limited fiscal space constrain broader transformation.

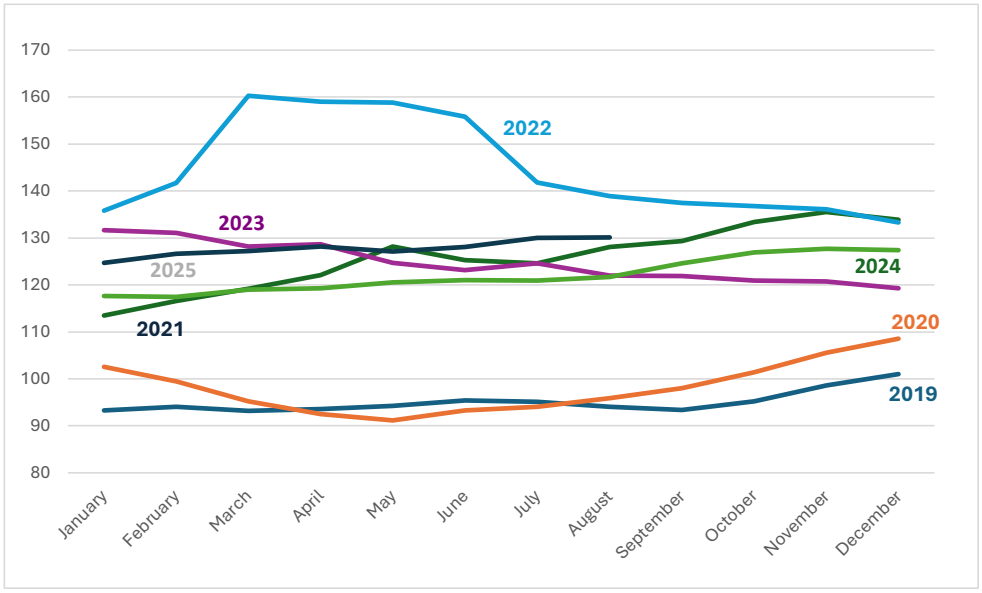
The focus section of the bulletin is on financing food systems transformation, and gives a summary of Part II of the 2024 *Near East and North Africa Regional Overview of Food Security and Nutrition (hereafter referred to as SOFI 2024) that addresses how the transformation of agrifood systems can be financed. It assesses the current level of agrifood systems financing. It discusses how to repurpose current public support to support sustainable food systems transformation and healthy diets and presents how to mobilize additional financial resources, concessional capital, investment finance and innovative instruments, and concludes with policy recommendations. This bulletin also highlights the way forward, such as the Transformational Impact Partnership (TIP) in the region that provides the region with a dedicated platform to mobilize, align and govern financing for agrifood system transformation.*

SECTION I: FOOD COMMODITY MARKETS AND FOOD SECURITY SITUATION

Global food commodity markets

The FAO Food Price Index (FFPI)[i] stood at 130.1 points in August 2025, almost the same as the revised July figure of 130.0. Lower values for cereals and dairy were counterbalanced by gains in meat, sugar and vegetable oils. Compared with August 2024, the index was up by 8.4 points (6.9 percent), yet it remained 30.1 points (18.8 percent) below its record high of March 2022. Food prices are at around their levels of 2021, however, significantly above the 2019–2020 food prices.

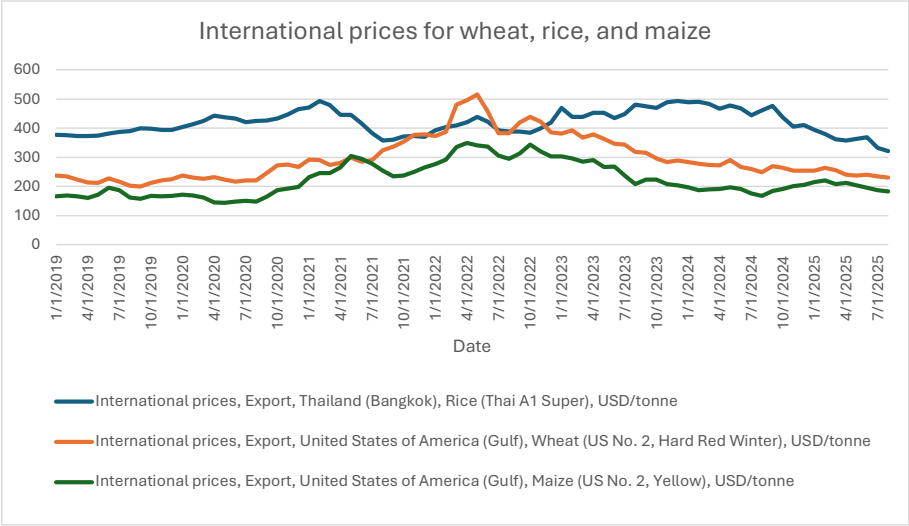
Figure 1. FAO Food Price Index



Source: FAO. 2025. *FAO Food Price Index. In: Food and Agriculture Organization*. Rome. [Cited 7 September 2025]. https://www.fao.org/worldfoodsituation/foodpricesindex/en/

i The FAO Food Price Index (FFPI) is a measure of the monthly change in international prices of a basket of food commodities. It consists of the average of five commodity group price indices weighted by the average export shares of each of the groups over 2016–2014. Additional details available at: https://www.fao.org/worldfoodsituation/foodpricesindex/en/

Figure 2. International prices of wheat, corn and rice (USD/tonne)



Source: FAO. 2025. *Food Price Monitoring and Analysis (FPMA) tool: International price series*. Rome. [Accessed 7 September 2025]. https://fpma.fao.org/giews/fpmat4/#/dashboard/tool/international. Licence: CC-BY-4.0.

As of August 2025, the price of wheat (US No. 2, HRW) was USD 231 per tonne, maize (US No. 2, Yellow) USD 183 per tonne and rice (Thai A1 Super) USD 322 per tonne, all remaining well below COVID-19 pandemic era averages (Figure 2). Global maize prices continued their decline through August, pressured by abundant seasonal supply from Brazil's safrinha harvest and strong competition from South American exporters, alongside expectations of a record 2025/26 US maize crop projected at nearly 16.7 billion bushels.[1] Wheat prices also edged lower,[2] reflecting subdued international demand and favourable harvest outcomes across parts of Europe, the Black Sea region and the United States of America, where timely rainfall in late summer helped relieve earlier drought concerns.[3] In contrast, international rice markets softened after mid-year gains, with Thai A1 Super and other Indica quotations falling in response to stronger availability from Thailand and Viet Nam, and intensified exporter competition.[4] FAO's All Rice Price Index reflected the international rice market trends, averaging 101.4 points in August 2025, down 2.0 percent from July and 24.3 percent below its level a year earlier, hitting a 44-month low. The drop was largely driven by a 2.7 percent fall in the Indica Index, though Japonica and Glutinous rice quotations also fell, particularly in Viet Nam, amid weak demand and seasonal harvest arrivals.[5] Beyond short-term price movements, FAO's latest forecast for world cereal production in 2025 was revised up by 35.6 million tonnes (1.2 percent) compared to July, primarily reflecting improved prospects for coarse grain crops. Global cereal output is now expected to reach a record 2 961 million tonnes, which is 3.5 percent above last year's level. The world wheat forecast stands at 804.9 million tonnes, down slightly from July projections due to reduced yield expectations in China (mainland) from adverse weather and a smaller-than-expected area in Argentina. These declines were partly offset by upward revisions in the European Union, where late-season rainfall improved yield prospects.[6]

As of August 2025, the price of crude oil stood at USD 67 per barrel, reversing the trend of crude oil prices rising over the last two months to USD 69 per barrel in both June and July; the Natural Gas Index stood at 96.35, continuing its decline since February 2025, when it stood at 133.12 (Figure A1). Concerning fertilizer prices, as of August 2025, diammonium phosphate (DAP) was USD 795/mt, urea USD 507.7/mt and potassium chloride USD 356.5/mt, continuing the drastic increases for all three fertilizers' prices since the start of the year (Figure A2).

Food prices

Based on FAO's nowcasting tool,[7] the food consumer price variation was 33.8 percent in the NENA region on average as of 7 September 2025 (compared to the same month of the previous year). This is significantly higher than in the second quarter of 2025 (9.2 percent on 9 June 2025). Within the region (Figure 3), the expected year-over-year food prices variation as of 7 September 2025 was highly uneven: Algeria (-3.6 percent), Bahrain (-4.2 percent), Egypt (2 percent), Iraq (-8.1 percent), Jordan (0 percent), Kuwait (6.6 percent), Lebanon (21.5 percent), Libya (186.9 percent), Mauritania (0.8 percent), Morocco (0.4 percent), Oman (-0.4 percent), Palestine – West Bank (199 percent), Qatar (4 percent), Saudi Arabia (1.9 percent), the Sudan (58.2 percent), the Syrian Arab Republic (-7.7 percent), Tunisia (6 percent) and United Arab Emirates (0.4 percent).

Figure 3. Expected year-on-year food price variation map (FAO's Data Lab)

Note: Refer to the disclaimer on page ii for the names and boundaries used in this map. The final boundary between the Sudan and South Sudan has not yet been determined. The final status of the Abyei area is not yet determined.

Source: FAO. 2025. Data Lab: Nowcasting Food Prices Rome. [Accessed on 7 September 2025]. http://foodandagricultureorganization.shinyapps.io/dl_foodprices/. Licence: CC-BY-4.0.

Based on the FAO Daily Food Prices Acceleration Monitor,[8] which aims to detect the abnormal acceleration in daily food prices, in most of the countries in the region, short-term food price increases have remained within normal ranges (less than 0.5 standard deviation) as of 6 September 2025 Figure 4). In Morocco, food price growth showed a mild change (between 0.5 and 1.0 standard-deviation). In Egypt, Saudi Arabia and the Sudan, however, recent food price growth was significantly above normal (between 1 and 2.5 standard deviation). Based on the findings from the Nowcasting Tool and the Daily Food Prices Acceleration Monitor, although food prices remain much higher than the previous year (as captured by the variation of the Food Price Index), the most recent daily data suggest that current price growth is not accelerating further in most countries.

Figure 4. FAO Daily Food Prices Acceleration Monitor

Note: The Daily Food Prices Acceleration Monitor developed by FAO's Data Lab aims to detect abnormal growth and acceleration in daily food prices on a basket composed of 14 commodities derived from a crowdsourcing platform (Numbeo).

Source: FAO. 2024. Data Lab: Daily Food Prices Acceleration Monitor Rome. [Accessed on 7 September 2025]. https://foodandagricultureorganization.shinyapps.io/dl_foodprices/. Licence: CC-BY-4.0.

Refer to the disclaimer on page ii for the names and boundaries used in this map. The final boundary between the Sudan and South Sudan has not yet been determined. The final status of the Abyei area is not yet determined.

Crop prospects: Crop monitor early warning

Across the Near East and North Africa, wheat harvesting concluded in July, marking the end of the 2024/25 cycle, while preparations for the upcoming 2025/26 season are progressing with planting scheduled to begin in October.[9] In Egypt, the outlook remains relatively stable compared to much of the region, as irrigation continues to underpin favourable growing conditions.[10] Summer-planted maize and rice crops are mostly in the vegetative to reproductive stage, and the second Nili season rice is currently being sown. This additional season is crucial for sustaining domestic rice supply during periods of high demand. Although rising temperatures are forecast for the central and eastern parts of the country, irrigation infrastructure has so far offset potential heat stress, supporting steady crop growth and safeguarding yields.

In the western part of the region, climatic stresses dominate the picture. Algeria, Morocco and Tunisia are all expected to experience sustained heat anomalies, both in the short term and extending into the September to November season. These warming trends are particularly concerning as they overlap with the critical preparation period for the next wheat cycle, when soil moisture and moderate conditions are essential for successful planting. In Tunisia, cereal production in 2025 is estimated at 1.7 million tonnes, about 18 percent above the five-year average, thanks to improved rainfall and favourable yields in key provinces. Wheat import requirements for 2025/26 are forecast at about 2 million tonnes, around 4 percent below average, reflecting the strong harvest. Food inflation has eased, standing at about 6 percent in July 2025, with vegetable, meat and fruit prices rising, while edible oil and eggs prices declined.[11] Northwest Libya is also anticipated to face above-average

temperatures later in the season, further underlining the broader warming pattern that characterizes much of North Africa. Mauritania offers a more mixed picture: southern areas are forecast to benefit from above-average rainfall in the immediate term, which could ease pressure on rainfed crops, yet this positive development is counterbalanced by the likelihood of unusually high temperatures across much of the country over the coming months, creating risks for crop maturation and water availability.[10]

In the eastern Mediterranean, production and climate challenges are particularly acute. Lebanon's cereal output in 2025 is estimated at just 90 000 tonnes,[12] around 50 percent below the long-term average. Conflict disruptions during the planting season displaced households and limited land access, particularly in the south, reducing the cultivated area. These disruptions were compounded by dry and hot weather, high production costs and extremely poor rainfall performance, with cumulative precipitation between December 2024 and February 2025 falling to less than half of normal levels. The Bekaa and Baalbek-Hermel governorates, typically the country's main breadbasket, recorded particularly severe shortfalls, severely constraining production potential. The Syrian Arab Republic has faced even deeper setbacks, with 2025 cereal production estimated at 1.2 million tonnes,[13] approximately 60 percent below average. A combination of severe drought, record-low rainfall between November 2024 and March 2025, extreme heat, and ongoing conflict drove one of the weakest harvests in the past decade. Conflict-related disruptions limited farmers' ability to access fields during the planting period, while soaring input and production costs further curtailed planting.[9]

In Iraq, agricultural policies have responded to water scarcity through restrictions rather than expansion. This year, the government imposed a ban on rice cultivation to conserve water for alternative uses, repeating measures taken in other drought years such as 2018, 2022 and 2023.[9] While this may preserve limited water resources, it further constrains domestic rice availability, shifting pressure to imports. The climatic outlook for Iraq is also challenging, with above-average temperatures expected across the country in the near term, and below-average precipitation likely in northern regions later in the season.

Other parts of the Arabian Peninsula and Levant are also expected to experience abnormal warming. Jordan, Kuwait, western Oman and northern Saudi Arabia are all projected to undergo above-average temperatures in the short term, with the heat likely to affect both agriculture and broader resource management systems. In Yemen, conditions reflect both scarcity and extremes. Southern areas are forecast to face below-average precipitation, while higher-than-normal temperatures are expected across the country, with the south particularly vulnerable to compounded risks of heat and dryness. The Sudan shows a similar divergence in conditions: the country overall is expected to experience hotter weather, yet southern regions may benefit from above-average rainfall, which could provide some relief for agricultural production in those areas.[9]

Global and regional wheat supply and demand estimates

Wheat production in North Africa is projected to rise by 4.2 percent in 2025/26, reaching 17.3 million tonnes compared to 16.6 million tonnes in 2024/25, with gains in Morocco (from 2.5 to 3.0 million tonnes), Tunisia (from 1.15 to 1.25 million tonnes), and a modest increase in Egypt (from 9.4 to 9.5 million tonnes), while Algeria holds steady at 3.0 million tonnes. Imports are expected to edge up to 51.4 million tonnes and exports to decline from 2.1 to 1.6 million tonnes, indicating tight domestic balances. In contrast, Near East countries are projected to face a 10.4 percent decline in

wheat production, falling from 8.7 million tonnes in 2024/25 to 7.8 million tonnes in 2025/26, driven mostly by the Syrian Arab Republic, where output is projected to drop from 1.8 million tonnes to 1.0 million tonnes, alongside smaller reductions in Iraq (from 5.2 to 5.1 million tonnes) and Jordan (from 34 000 to 20 000 tonnes), while imports remain steady at 24.5 million tonnes, highlighting persistent reliance on external supply. Against this backdrop, global wheat production is projected to expand modestly, from 798.1 million tonnes in 2024/25 to 804.9 million tonnes in 2025/26 (up 0.9 percent), meaning North Africa's growth outpaces the world average, while the Near East lags with a notable contraction. Yet, in both subregions, high consumption levels relative to production ensure that wheat imports remain among the largest worldwide.

Table 1. Wheat supply and demand (million tonnes)

2024/25 Estimate	Production	Imports	Food use	Domestic use	Trade[ii]	Change in stocks
World	798	NA	543	795	193	2
North Africa[iii]	16.6	50.7	45.4	50.7	2.1	-1.8
Near East[iv]	8.7	24.5	22.4	24.5	0.7	-0.2
2025/26 Projection	**Production**	**Imports**	**Food use**	**Domestic use**	**Trade**	**Change in stocks**
World	805	NA	546	803	201	-1
North Africa	17.3	51.4	45.6	51.4	1.6	-0.8
Near East	7.8	24.5	22.7	24.5	0.7	-0.1

Source: FAO Markets and Trade Division (EST) calculations.

Food insecurity hotspots

According to the latest Integrated Food Security Phase Classification (IPC), in Palestine (Gaza Strip), famine (IPC Phase 5) has been confirmed in Gaza Governorate and is projected to expand to Deir Al-Balah and Khan Younis between mid-August and September 2025.[14] Over 1.98 million people are facing Crisis or worse (IPC Phase 3 or above), including 641 000 in Catastrophe (IPC Phase 5), 1.14 million in Emergency (IPC Phase 4), and nearly 200 000 in Crisis (IPC Phase 3). Acute malnutrition is escalating rapidly, with 132 000 children under five expected to be acutely malnourished through mid-2026, double the estimates from May, alongside 55 500 pregnant and breastfeeding women in urgent need of nutrition support. The halt of humanitarian and commercial food flows since March, coupled with devastated croplands, livestock losses and widespread displacement, has collapsed food systems and exhausted coping mechanisms. Food prices have surged, and extreme scarcity has forced households into unsafe conditions in their search for food, while disease outbreaks, collapsed health and WASH[v] services, and soaring non-trauma mortality mirror famine mortality patterns. The IPC Famine Review Committee warns that starvation and preventable deaths are already widespread and will intensify without immediate, large-scale humanitarian access and a sustained ceasefire.

ii July/June marketing season

iii North African countries: Algeria, Egypt, Libya, Mauritania, Morocco, Sudan and Tunisia.

iv Near East countries: Bahrain, Iraq, Jordan, Kuwait, Lebanon, Oman, Palestine, Qatar, Saudi Arabia, Syrian Arab Republic, United Arab Emirates and Yemen.

v The term WASH in health care facilities refers to the provision of water, sanitation, health services waste management, hygiene and environmental cleaning infrastructure and services across all parts of a facility.

In Yemen, conflict, economic collapse and sharp reductions in humanitarian food assistance are driving a rapid deterioration in food security across both Government of Yemen (GoY) and Sana'a-based Authorities (SBA) areas.[15] In GoY-controlled areas, nearly 4.95 million people (49 percent of the analysed population) are facing acute food insecurity (IPC Phase 3 or above) between May and August 2025, including 1.5 million in Emergency (IPC Phase 4). All 118 districts are classified in Crisis or worse, with 41 in Emergency, a major increase compared to early 2025. Conditions are projected to worsen between September 2025 and February 2026, with 5.38 million people (53 percent) expected in Phase 3 or above and 48 districts in Emergency. Cuts to humanitarian assistance, falling from 3.6 million recipients in early 2025 to none after July, combined with currency collapse, soaring food and fuel prices, reduced incomes and poor seasonal rains are driving the crisis, with wheat flour in Aden projected to rise over 20 percent year-on-year and the cost of the minimum food basket exceeding YER 202 000 per household by early 2026.

In SBA-controlled areas, the situation is even more severe, with 12.2 million people (49 percent of the population analysed) facing IPC Phase 3 or above between May and August 2025, including 3.7 million in Emergency (IPC Phase 4). The outlook for September 2025 to February 2026 is bleaker still, with 12.8 million (52 percent) projected in Crisis or worse, including 41 000 people in Catastrophe (IPC Phase 5) in parts of Amran, Al Hodeidah, and Hajjah. All 215 districts analysed are classified as in "Crisis" or "Emergency", and 102 are already in Emergency, reflecting intensifying conflict, the destruction of key infrastructure and deepening economic decline. Humanitarian food assistance has contracted sharply, reaching only 2.85 million people by April 2025 and covering just 20 percent of caloric needs, while further cuts are expected. Combined with high living costs, widespread displacement, and disrupted livelihoods, the risk of famine pockets emerging in the projection period is high, particularly if violence escalates or assistance falls further.

SECTION II: REGIONAL FOOD POLICY-RELATED DEVELOPMENTS

Algeria

In July, Algeria's Office Algérien Interprofessionnel des Céréales (OAIC) secured 1.05 to 1.08 million tonnes of milling wheat in a major international tender. The purchases were sourced mainly from the Black Sea and Baltic regions. Prices averaged around USD 257 per tonne. Deliveries were scheduled for September and October to stabilize local flour supply.[16] At the same time the Ministry of Agriculture signed agreements with six public banks to finance refrigerated storage facilities for farmers, the programme, known as Tabrid, provided interest-free loans of up to DZD 150 million with repayment periods of 10 years and expands storage capacity to help farmers manage surplus products and stabilize markets.[17]

In August, Algeria signed a sanitary agreement with Brazil which authorized the export of live sheep from Brazil to Algeria. Algeria imported nearly USD 7.8 million worth of live sheep in 2024, previously sourced exclusively from Romania, the deal opened a new market especially for Brazil's northern and northeastern sheep producers.[18]

In September, the International Agriculture and Plant Production Exhibition took place in Sétif with 49 exhibitors from Algeria, Tunisia and Türkiye, organized by Ritadj Expo under the slogan 'Intelligent harmony in agricultural practices', it showcased machinery, irrigation systems, seeds, fertilizers, produce and insurance services. The four-day programme also featured scientific symposia on modern agricultural techniques and sustainable development.[19]

Bahrain

It was reported in July that Bahrain's livestock population recorded a sharp increase over the past decade, with sheep remaining the most dominant, goat and cattle numbers stayed stable, while horse and camel populations showed little change, chicken farms also maintained consistent levels, reflecting steady local poultry production.[20]

Later in August, Bahrain prepared to host its first Veterinary Medicine Forum and Exhibition, the event gathered veterinarians, researchers and companies from the Gulf Cooperation Council (GCC) and beyond. The World Organisation for Animal Health (WOAH) also took part with exhibitions showcasing the latest veterinary technologies.[21] In addition, Aluminium Bahrain (Alba) and Derasat partnered to strengthen ESG (environmental, social and governance) initiatives in line with Bahrain's 2060 net-zero goals. The agreement focused on boosting energy efficiency and reducing emissions; a joint task force was set up to study the optimal energy mix for Alba's operations and to build a unified ESG framework.[22]

In September, Bahrain hosted the second edition of the Global Water, Energy and Climate Change Congress (GWECCC) under the patronage of Deputy Prime Minister Shaikh Khalid bin Abdulla Al Khalifa, the three-day event gathered over 3 000 participants from 30 countries and featured 150 speakers representing nearly 250 companies. The programme included ministerial sessions, leadership dialogues, a youth forum and a hackathon for GCC university students. An accompanying exhibition showcased advanced technologies and sustainability solutions from leading firms such as Bapco Energies, Saudi Aramco and ACWA Power.[23]

Egypt

In July, the Egyptian Food Bank received the FAO Award, standing out among 69 organizations worldwide. The NGO (non-governmental organization) scaled up its operations to distribute food to vulnerable groups while developing community-driven initiatives. It reduced food waste through recovery systems and provided assistance to smallholders. Its model also extended humanitarian relief across neighbouring countries in need.[24]

Egypt's agricultural exports climbed to 6.2 million tonnes by mid-2025. Citrus fruits, potatoes, onions and beans made up the bulk of shipments.[25]

Also in July, the government established a national climate finance platform to support the decarbonization of its industrial sector and safeguard exports from the European Union's Carbon Border Adjustment Mechanism (CBAM). The Ministries of Industry and Planning formed a joint technical committee to oversee the initiative. The platform connected Egypt's industrial strategy with international climate finance tools, including the Green Climate Fund and the EBRD (European Bank for Reconstruction and Development).[26] Later in the month, the governments of Egypt and Norway signed a USD 650 million agreement to build a 1-gigawatt solar power plant in Nagaa Hammadi. The project, led by Egyptalum and Scatec, was structured in two 500 megawatt-hours phases with integrated battery storage. Scatec financed, constructed and operated the facility to supply Egyptalum's electricity demand from renewable sources.[27]

In August, Egypt procured almost 4 million tonnes of wheat from domestic farmers, up from 3.43 million in 2024. The harvest ran from April to August, with a total output of around 10 million tonnes. Procurement supported reserves and bread supply.[28] During the same month, Egypt commissioned the Red Sea Wind Energy project, the largest wind farm in the Middle East and Africa with a capacity

of 650 megawatts. The facility was developed by Engie, Orascom, Toyota Tsusho and Eurus Energy, and included 84 turbines. It was financed by international banks under a long-term power purchase agreement with the national transmission company.[29]

Egypt's agricultural exports rose to 7 million tonnes between January and early September, an increase of 650 000 tonnes compared to the previous year. Citrus and potatoes led with 1.9 and 1.3 million tonnes, while grapes, onions and beans followed at 180 000, 250 000 and 222 000 tonnes respectively, these results, according to the Ministry of Agriculture, reflected stricter quality standards and the opening of new markets.[30]

Iraq

It was reported in July that Iraq's Ministry of Agriculture signed a contract addendum to rehabilitate the Nineveh seed purification plant. The agreement followed technical and legal reviews in Baghdad; work began to modernize the facility and strengthen production capacity.[31] The Ministry also introduced the "dry seed method" for rice cultivation in Najaf's Al-Mashkhab research fields. Thousands of trays of jasmine and ghari rice varieties were planted, showing higher germination rates than traditional practices. The technique supported large-scale mechanical transplanting and better adaptation to water scarcity.[32]

Moving into August, Iraq introduced solar-powered irrigation to replace fuel-based systems. Expansion of desert farming increased reliance on costly and polluting energy sources; farmers were encouraged to adopt solar despite high upfront costs.[33] During the same period, the Ministry of Agriculture and the World Food Programme provided climate risk insurance in Nineveh, 94 farmers in Hamdaniya district received coverage for wheat, barley and olives. Payouts supported households against losses from drought and heat.[34]

In September, a World Bank team reviewed progress at Nineveh's agricultural research sites under the Additional Financing Project, noting that completion had reached 55 percent. Activities were underway at the Seed Research Division and Rashidiya Livestock Research Station, both part of the Agricultural Research Department.[35] Around the same time, Iraq's Veterinary Department conducted field inspections at local slaughterhouses, including the Al-Kanz facility in Al-Radwaniyah, to verify compliance with poultry health and safety standards. The Health Supervision Department team confirmed that poultry meat met hygiene requirements according to regulations.[36]

Jordan

In July, Jordan advanced a climate adaptation project in the Jordan Valley, backed by the European Union, the German Development Bank, the European Investment Bank, and the government, the EUR 87.13 million initiative rehabilitated 44 000 dunums of irrigation networks, expanded treated water use, and constructed a reclaimed water reservoir. It reached 257 800 people, including 4 453 farmers and their families, by improving irrigation stability and reducing water losses.[37] Moreover, Jordan's exports to the European Union increased significantly, driven by simplified rules of origin and compliance with EU standards. Garments, fertilizers, pharmaceuticals, chemicals and agricultural products led the export basket, while imports from the European Union mainly included machinery, vehicles and food items.[38]

In August, Jordan's grain agency issued tenders for 120 000 tonnes of barley and milling wheat. The move followed limited domestic production; accordingly, strategic stocks were confirmed to cover needs for several months; imports were expected mainly from the Russian Federation and Ukraine.[39]

In September, the Ministry of Industry, Trade and Supply raised the barley price to JOD 245 per tonne for most livestock farmers and importers, an increase of JOD 5, the Ministry of Agriculture kept the subsidized price for sheep farmers unchanged at JOD 175 per tonne, with bran remaining at JOD 77 per tonne. Other livestock farmers paid JOD 157 per tonne for bran, while a fee of JOD 1 450 was collected on each vehicle exporting live sheep. However, the Ministry of Agriculture maintained subsidized prices for sheep farmers at JOD 175 per tonne for barley and JOD 77 per tonne for bran, while others paid JOD 157 per tonne for bran. A fixed fee of JOD 1 450 was also collected for each vehicle exporting live local sheep.[40] During the same period, Jordan launched a pilot project in Wadi Al Seer to protect water and agricultural resources. The project restored springs, lined canals, and introduced solar-powered drip irrigation and drought-resistant crops. Furthermore, a local cooperative was formed to manage water distribution under oversight from national and municipal authorities.[41]

Lebanon

It was reported in July that Lebanon approved a USD 200 million concessional loan agreement with the World Bank to fund the Green Agri-Food Transformation project, the Ministry of Agriculture restructured the project with a strong governance framework. Investments targeted value chains, irrigation infrastructure, and climate-smart agriculture. The project supported farmers, SMEs (small and medium-sized enterprises) and rural communities to recover from prolonged crises.[42] At the same time, Lebanon's cherry production fell by 80 percent after severe weather, cutting volumes for export, limited shipments went to Gulf markets, while trial exports to Hong Kong and Singapore succeeded with premium-quality cherries. Growers expanded acreage, tested pest management measures, and worked under the Fruits and Vegetables Lebanon brand to sustain the sector.[43]

In August, Lebanon's Ministry of Agriculture signed a cooperation agreement with the SEAL Foundation. The programme distributed 3 300 battery-powered pruners and saws to registered farmers. Training on fruit tree pruning was also provided.[44] Furthermore, in Akkar, the Ministry of Agriculture expanded a nursery to produce millions of seedlings and opened a compost site with Emkan Association. A drone-based programme was launched to monitor forests, and the Al-Adhr area was declared a protected forest in partnership with Qobayat municipality.[45]

In September, the Ministry of Agriculture held a seminar in Marsati on sustainable agriculture and soil biodiversity under its National Agricultural Extension Program, which more than 90 participants, including officials, municipal leaders and farmers, attended. The role of biodiversity in soil fertility was explained, with comparisons made between organic and chemical fertilizer use. The ministry concluded by distributing organic medicines and protective goggles to support safer sustainable farming practices.[46]

Kuwait

It was reported in July that Kuwait revised its poultry import rules. The Public Authority for Food and Nutrition lifted a long-standing ban on Brazilian poultry after health clearance; at the same time, new restrictions were imposed on US regions hit by bird flu outbreaks. Brazil resumed its role as Kuwait's top poultry supplier.[47] Meanwhile, the Municipal Council's Technical Committee approved Kuwait Flour Mills and Bakeries Company (KFMB) to expand its operations across all bakery outlets. The decision allowed KFMB to provide a broader range of products, including beverages, pastries, sweets and bakery items. It also granted approval for the use of designated areas for manufacturing and storage, pending regulatory clearances.[48]

In August, Kuwait advanced its sustainability roadmap with the goal of carbon neutrality by 2060. The government pushed renewable projects such as the Shagaya Renewable Energy Park, a policy required facilities to generate part of their power from renewables, urban planning also integrated green buildings and expanded green spaces. The government also promoted green buildings, urban sustainability and desertification control under its 2040 Master Plan, while requiring facilities to generate part of their electricity from renewable sources.[49]

Mauritania

In July, Mauritania launched the second phase of its agricultural mechanization project. A four-party agreement was signed to provide 72 agricultural tractors, accessories and spare parts to regional councils, in addition, new workshops were set up to provide equipment maintenance, awareness campaigns and training programs were rolled out to farmers.[50] During the same month, the Ministry of Agriculture and Food Sovereignty and the National Federation of Agriculture signed an agreement to cut rice prices, a ton of raw rice was fixed at 14 000 ouguiyas and white rice at 28 000 ouguiyas, the move followed an evaluation of the agricultural campaign, which showed growth in irrigated areas and higher production supported by pest control and input distribution. [51]

In August, a new fish hatchery was inaugurated in the Mahmuda area of Béri Baffé, Nema Province, the facility operated with self-sufficiency in water and electricity through solar power, it was supervised by the Ministry of Fisheries and managed by the Agency for the Development of Fisheries and Inland Aquaculture.[52] At the same time, the Ministry of Environment and Sustainable Development launched the Green Partnership for a Sustainable Future in Adwirrara, Hodh El Gharbi, activities included visits to a plastic waste collection site and an organic fertilizer facility supporting local cooperatives, the ministry also highlighted its regional nursery, which produces over 3 000 saplings for community distribution.[53]

Morocco

It was reported in July that Moroccan fertilizer producer OCP Nutricrops signed an agreement to supply 1.1 million tonnes of fertilizers to Bangladesh for 2025/26, the deal was finalized with the Bangladesh Agricultural Development Corporation during an official visit, it ensured reliable fertilizer supplies to sustain crop yields, the agreement further strengthened Morocco's global role in agricultural inputs.[54] In the same month, Morocco increased wheat imports and built reserves after international prices dropped, large quantities of soft wheat were secured for bread and pastry production, the measure allowed mills to stabilize flour supplies without state subsidies, while stocks covered consumption needs for up to five months.[55]

In August, onion exports hit a record 64 900 tonnes after a state ban was lifted, west Africa remained the main market, while the United Arab Emirates became a new importer, the recovery restored onions as a leading Moroccan export crop.[56] Additionally, Morocco imported 7.5 million tonnes of wheat in 2025/26, purchases from the Russian Federation exceeded 1.1 million tonnes, making Morocco a top buyer, imports covered more than half of the country's wheat needs.[57]

In September, Morocco set a record for fresh onion exports, shipping 64 900 tonnes, a 4.8-fold increase from the previous season after the export ban ended, west Africa remained the main market, with Mauritania and Côte d'Ivoire leading imports, exports also expanded into the Middle East, with the United Arab Emirates emerging as a new buyer.[58] Meanwhile, Morocco reinstated customs duties and VAT (value added tax) on imported sheep and goats after suspending them during a red meat shortage. A livestock census showed the national flock had recovered to 23.1 million sheep and 7.47 million goats, considered adequate for demand. Meanwhile, chicken prices rose to about USD 2.30 per kilogram due to higher feed costs, heat losses and reduced chick production.[59]

Oman

It was reported in July that Oman signed a usufruct contract covering 10.5 million square metres in the Hanfit area of Thumrait for an agricultural investment project to grow moringa trees and manufacture byproducts, the project, led by Trufud with an investment value exceeding OMR 5.3 million, included facilities for producing oils and powders from moringa.[60] During the same month, Oman launched its first fully solar-powered eco-friendly residential community in Al Khabourah, Al Batinah North, the project included 36 energy-efficient homes, a community center, shops and a mosque, all equipped with solar panels, and also integrated sustainable wastewater treatment, allowing households to feed surplus electricity back into the grid.[61]

In August, two new dams were completed in North Sharqiyah at a cost of over OMR 116 000. One was a surface storage dam in Al Rashbi with a capacity of 4 000 cubic metres, while the other was a groundwater recharge dam in Quraisha able to store 45 000 cubic metres, the Ministry of Agriculture, Fisheries and Water Resources confirmed both projects aimed to regulate water flow, boost groundwater reserves and reduce flood risks.[62]

In September, Oman launched 12 agricultural investment projects in Al Buraimi Governorate covering 287.9 acres, the ventures included vegetable cultivation, livestock and fish farming, and facilities such as a veterinary clinic, a nursery, and a water bottling plant. Similar projects were rolled out across Al Buraimi, Mahda and Al Sunainah.[63] In addition, Oman hosted a Food Security Forum in Al Suwaiq, organized by the Chamber of Commerce and Industry. The two-day event featured sessions on agricultural and fisheries investment, financing and modernization of traditional farms, while an exhibition displayed innovative solutions and promoted partnerships with the government, private firms and international organizations.[64]

Palestine

It was reported in July that Palestine's Ministry of Agriculture signed an agreement with Palestine Technical University – Kadoorie to expand the university's branch in Al-Arroub. The deal formalized cooperation to strengthen agricultural education and research while integrating the National Center for Agricultural Research with the academic sector. Both sides also announced plans to hold a national conference bringing together academic, official and community bodies to discuss the state ofagriculture.[65]

In August, Palestine participated in a FAO-led project to monitor land and water productivity through the WaPOR satellite system, which operates with remote sensing. Applied in Jericho and the Jordan Valley, the data were integrated into national systems, and a farmer application was introduced to improve field-level decision-making.[66] During the same month, the Ministry of Agriculture signed 20 agreements in Jerusalem governorate for water harvesting, wells, tanks, and irrigation networks were built in seven villages, funding came from the Arab Organization for Agricultural Development.[67]

In September, a 25-dunum plot of land in the Jericho and Jordan Valley was allocated to the Ministry of Agriculture. The site was designated for cooling, packaging and shipping facilities to support agricultural exports. The decision was issued by the Council of Ministers and formalized through a presidential decree.[68] Additionally, the Palestinian Center for Economic and Social Development, in cooperation with the Ministry of Agriculture, distributed irrigation networks to 17 farmers in Hebron's Yatta region, each received a full system for a two-dunum plot, a 1 500-litre water tank and organic fertilizer.[69]

Qatar

In July, Qatar expanded its renewable energy capacity with the launch of solar plants in Ras Laffan and Mesaieed. Together with the Al Kharsaah project, total capacity reached 1 675 megawatts. Solar energy covered nearly 15 percent of the country's electricity demand, QatarEnergy confirmed plans to scale capacity to 4 000 megawatts by 2030.[70]

In August, Qatar advanced its National Food Security Strategy 2030, dairy and poultry reached 98 percent self-sufficiency, while vegetables and eggs were targeted next; private firms invested in agri-tech alongside public institutions.[71] At the same time, the Ministry of Commerce and Industry launched a public tender for 2.4 million bags of barley to support the livestock sector. The tender was managed by the Tenders and Auctions Committee to secure fodder supplies and strengthen foodsecurity.[72]

In September, Doha hosted the tenth meeting of the Ad Hoc Technical Committee on Plant Genetic Resources. Organized by the Agricultural Research Department, the event brought together regional and international experts to review conservation practices, climate adaptation and treaty implementation. Qatar's Gene Bank and research work were highlighted during the sessions.[73]

Saudi Arabia

In July, Saudi Arabia's Ministry of Environment, Water and Agriculture signed a contract for a project on ground and surface water use and flood risk mitigation. The project included studies and designs for rainwater harvesting infrastructure such as dams, water barriers and ponds. It also covered watershed assessments, monitoring of water sources and technical reporting.[74] In the same month, the National Company for Agricultural Services (AgriServ) launched a veterinary care package through 16 clinics in Riyadh, the package included mobile teams for animal health checks, vaccinations and treatments, as well as virtual clinics with remote consultations and e-prescriptions. The service was also linked to a unified digital app, with plans for nationwide expansion.[75]

In August, Saudi Arabia lifted its poultry ban on Brazil's Rio Grande do Sul region after a bird flu outbreak ended. Brazilian producer BRF resumed exports; Chile also reopened trade, though China and other buyers kept restrictions.[76] During the same period, a Masdar-led consortium secured USD 1.1 billion financing for the 2 gigawatt Al Sadawi solar project in the Eastern province, the partners included GD Power Development Company and Korea Electric Power Corporation, with funding from eight regional and international banks. A long-term power purchase agreement was signed with the Saudi Power Procurement Company under a build–own–operate model.[77]

In September, Saudi Arabia approved a new regional protocol with PERSGA[vi] member states to protect marine resources. The agreement focused on habitat preservation, combating illegal fishing, enhancing data exchange, and providing training to modernize legislation and improve biosecurity.[78] Meanwhile, the National Center for the Prevention and Control of Plant Pests and Animal Diseases (Weqaa) held a forum in Buraidah on sustainable palm tree management. The discussions addressed pest control, including the red palm weevil, and agreements were signed to improve diagnostics and strengthen cooperation with the private sector.[79]

Sudan

In July, the Sudan signed a contract to take part in the Yokohama International Agricultural and Horticultural Exhibition in 2027, securing a pavilion to present its agricultural sector to global investors. The Ministry of Agriculture signed the deal alongside Japan's ambassador. The Sudan also confirmed it would showcase its agriculture at Expo Osaka 2025.[80] Also in July, the Ministry of Production and Economic Resources in Gezira State commended FAO for supporting agricultural production, with the FAO delegation reporting on the provision of production supplies, distribution of improved seeds and assistance to the horticultural sector.[81]

In August, FAO worked with the Government of Sudan to rehabilitate agricultural and livestock resources in Khartoum State. FAO's resident representative met a Transitional Sovereignty Council member to present recovery plans since large areas of vegetable production and livestock herds had been destroyed by conflict.[82]

vi PERSGA member states are Djibouti, Egypt, Jordan, Saudi Arabia, Somalia, the Sudan and Yemen.

Syrian Arab Republic

It was reported in July that the severe drought the Syrian Arab Republic experienced in 2025 caused a sharp collapse in wheat production. The government and the Autonomous Administration in the north and east of the country competed for limited supplies; declining rainfall and groundwater depletion left millions facing food insecurity.[83] In response, the Ministry of Agriculture signed a cooperation agreement with the World Food Programme to support 33 000 drought-affected farmers across Aleppo, Hama, Idlib, Homs, Hasakah, Daraa, Raqqa and Deir ez-Zor. The assistance combined cash and in-kind aid, distributed over a three-month period to help sustain production.[84]

In August, additional measures were taken to address the crisis. The General Commission for Scientific Agricultural Research approved two new high-yielding wheat varieties for irrigated agriculture, complementing earlier approvals of "Douma 5" and "Sham 2" for rainfed areas.[85] Also in August, the Ministry of Economy and Trade imposed a temporary ban on the import of several fresh produce items, extending earlier restrictions. Officials emphasized its short-term nature, while trade talks with Türkiye continued alongside preparations for the Damascus International Trade Fair.[86] Meanwhile, the government issued a tender to import 200 000 tonnes of wheat, after production fell by 40 percent, with state funds used to secure essential bread supplies.[87]

In September, the Syrian Arab Republic moved to strengthen food security through innovation, the General Organization for Seed Multiplication led the National Potato Seed Production Project, which relied on isolating meristems from disease-free tubers and multiplying them in vitro to produce virus-free seedlings. Consequently, the initiative not only improved local seed availability but also established a gene bank to preserve Syrian potato varieties for the future.[88]

Tunisia

In July, Tunisia signed a USD 38 million loan agreement with the Saudi Fund for Development to implement the Oasis Hub project in the south. The project covered more than 1 000 hectares of farmland across governorates such as Tataouine, Kebili and Medenine, with plans for 22 irrigation and drinking water wells. It also included the construction of 285 housing units, along with roads, schools, cultural and commercial centres.[89] During the same month, Tunisia's Ministry of Agriculture issued Decree 2025/344 regulating the cereal campaign for 2025/26. The decree fixed purchase and storage prices for durum wheat, soft wheat, barley and triticale, while also introducing exceptional bonuses and early delivery premiums. Furthermore, new statistical and solidarity taxes were applied to reinforce the cereals fund.[90]

In August, Tunisia's date exports dropped in both volume and value during the first nine months of the campaign: Deglet Nour remained the dominant variety. With the European Union as the top importer and Germany the main destination for organic dates, authorities set new reference prices and reinforced quality standards.[91] In contrast, olive oil exports rose by 40 percent in volume, but revenues fell by 29 percent because of sharp price declines. Bulk shipments represented 88 percent of exports, mainly to Italy and Spain, while authorities launched a promotional campaign to increase value-added sales.[92]

In September, Tunisia, through its Agricultural Investment Promotion Agency, participated in the Big Tech Africa exhibition in Tunis, where the country showcased climate-smart innovations developed with the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ)[vii] and the Soil Matters project, including digital nutrient mapping, AI-based tools and agroecological inputs.[93] The Central Bank of Tunisia reported in September that loans to agriculture and fisheries had risen to TND 4.2 billion in 2024, an increase of 7.8 percent. Industrial credits grew more modestly by 2.8 percent, while new measures such as revised credit scales and interest subsidies were introduced to prioritize agriculture for food security and climate resilience.[94]

United Arab Emirates

In July, Tadweer Group, Abu Dhabi's waste management authority under ADQ (Abu Dhabi Developmental Holding Company), joined the United Nations Global Compact. The company committed to the Ten Principles, with a focus on environmental stewardship and annual progress reporting.[95] During the same month, the Abu Dhabi Agriculture and Food Safety Authority (ADAFSA) transitioned its services and infrastructure to cloud computing. The shift formed part of Abu Dhabi's digital strategy to integrate more than 40 government entities into a centralized, hybrid, multi-cloud system.[96] Meanwhile, the Environment Agency – Abu Dhabi launched its Climate Change Adaptation Plan for 2025–2050. The plan identified 142 actions across groundwater, soil and biodiversity, with 86 projects prioritized for implementation within five years, aligning with the United Arab Emirates' national climate strategy.[97]

In August, the Ministry of Climate Change and Environment (MOCCAE) conducted 27 joint inspections covering 91 facilities across the United Arab Emirates. The campaigns monitored livestock, agriculture, fisheries and industrial facilities such as crushers and cement factories.[98] In addition, Emerge, a joint venture between Masdar and EDF (Électricité de France) Group, signed a memorandum of understanding (MoU) with the Emirates Development Bank to develop and finance distributed solar projects. The partnership enabled SMEs and industrial firms to reduce costs through renewable energy investments.[99] At the same time, Sharjah hosted its 8th Investment Forum alongside the World Investment Conference, bringing together global investors and policymakers for discussions on green finance, food security and sustainable investment.[100]

In September, the Abu Dhabi International Hunting and Equestrian Exhibition (ADIHEX) featured extensive participation from veterinary and animal health institutions. Exhibitors presented innovations in veterinary care, breeding technologies and animal nutrition. Key participants included the Advanced Scientific Group's camel research lab, United Arab Emirates University's veterinary and food science programmes, and companies like Zabeel Feed and Al Hikma.[101] Furthermore, the Abu Dhabi Department of Energy signed an agreement with Goldman Sachs International to strengthen water security. The deal introduced new financing models for modernizing water infrastructure, reducing network losses and advancing clean-energy desalination – all linked to Abu Dhabi's digital platform (AD.WE) and the United Arab Emirates Water Security Strategy 2036.[102]

vii German Agency for International Cooperation

Yemen

In July, Yemen's Makhlaf Munqitha Cooperative launched a wheat and legume seed distribution campaign in Dhamar. The initiative was implemented with the General Corporation for Grain Development and other partners where large quantities of seeds were delivered to farmers ahead of the autumn season. Cooperatives also received financial support to expand cultivation.[103] During the same month, the Government of Change and Development launched the Value Chain Management Program to lower import costs and strengthen self-sufficiency. The programme mobilized government, private sector and community partnerships to improve economic resilience.[104]

In August, The General Authority for Science, Research, Technology and Innovation developed local solar dryers to cut post-harvest losses, producing them at 30 percent of the import cost. Trials were carried out on grapes, coffee, dates and palms, showing strong results with farmers in Al-Hodeidah.[105] At the same time, Al-Hodeidah launched agricultural projects worth YER 272.5 million, funded by the Agricultural and Fisheries Initiatives Financing Unit. The works included drilling five solar-powered wells and restoring the Tihama Agricultural Research Station.[106] Meanwhile, the Sahel Tihama Cooperative Fisheries Association introduced the first phase of a Community Savings Fund for fishermen in Hodeidah, with an allocation of YER 25 million. The fund benefited 70 fishermen and was implemented in coordination with the Red Sea Fisheries Authority, the Navy and the Coast Guard.[107]

In September, the Khadir Cooperative Association in Taiz opened the new Agricultural Services Center to support local farmers. The centre was financed through an interest-free loan of YER 6 million from the Agricultural and Fisheries Projects and Initiatives Financing Unit. It supplied seeds, fertilizers, pesticides, equipment and other essential inputs to farmers. The facility also offered agricultural extension and advisory services under the agricultural value chain programme.[108]

SECTION III: FINANCING THE TRANSFORMATION OF AGRIFOOD SYSTEMS

The Near East and North Africa region faces converging pressures on food security and nutrition (FSN), namely rising costs of healthy diets, conflicts, climate change, water scarcity and dependence on imports. These vulnerabilities underscore the urgency of transforming agrifood systems. This section of the bulletin gives a summary of Part II of the *2024 Near East and North Africa Regional Overview of Food Security and Nutrition* [109] (also referred to as SOFI 2024), which addresses how the transformation of agrifood systems can be financed.

SOFI 2024 uses a new framework for assessing financing for FSN (core financing flows and extended financing flows). It assesses the current level of agrifood systems financing and discusses how to repurpose current public support to bolster the transformation of sustainable food systems and healthy diets. It also presents how to mobilize additional financial resources, concessional capital, investment finance and innovative instruments, and concludes with policy recommendations.

This bulletin also highlights the way forward, such as the Transformational Impact Partnership (TIP), which provides the region with a dedicated platform to mobilize, align and govern financing for agrifood system transformation.

Financing the transformation of agrifood systems

The *2024 State of Food Security and Nutrition in the World* defines financing for FSN as the mobilization of resources from public and private, and domestic and foreign sources to guarantee stable access to safe and nutritious food, while also recognizing the importance of supporting conditions such as health services, safe water and feeding practices. These flows must meet both immediate humanitarian needs and long-term resilience goals. The challenge is not only to secure sufficient levels of financing but also to ensure that investments are directed to interventions that address systemic vulnerabilities, improve nutrition outcomes and strengthen the capacity of food systems to adapt to repeated shocks. Without better targeting, resources will continue to be absorbed by short-term fixes. With a more strategic approach, however, financing can become the basis for food systems that deliver healthier diets, reduce vulnerability and improve resilience across the Arab region.

Table 2. Matrix of the different financing flows by source

Source of financing	Domestic	Foreign
Public	Public spending	Official development assistance Other financial flows
Private	Domestic private sector investment and spending	Multinational corporations' investments and spending Foreign direct investment Cross-border remittances

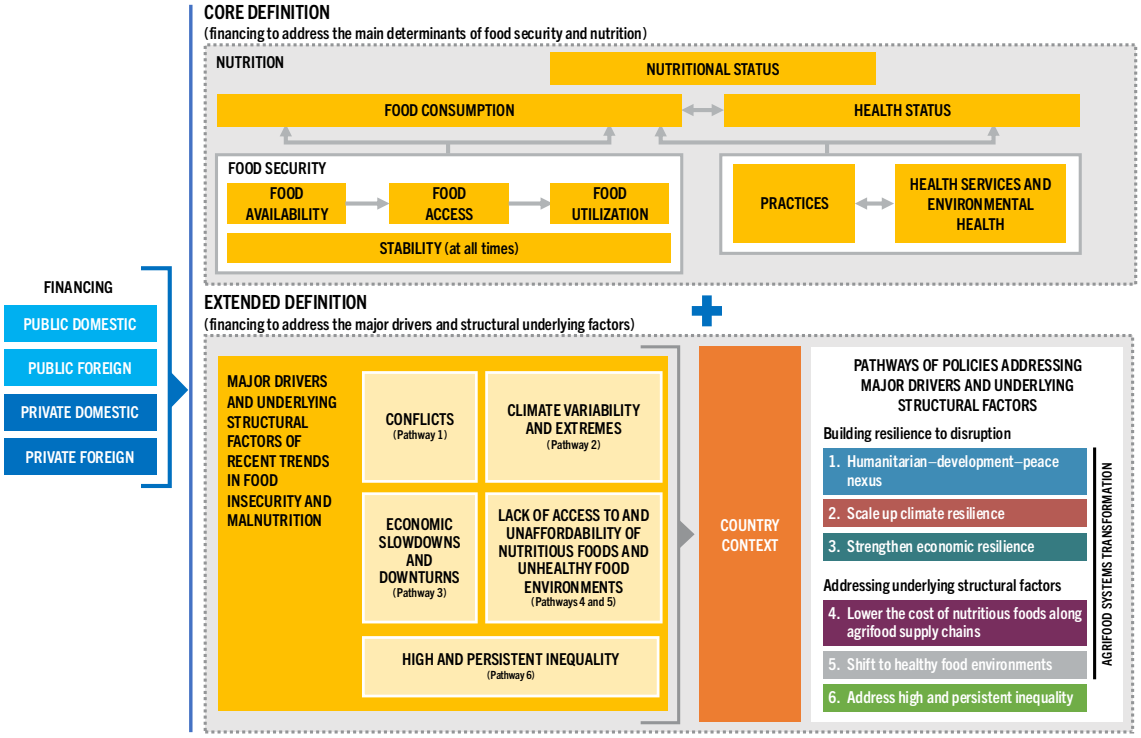
Note: The table is simplified to only show examples of different financing flows that belong exclusively to each source of financing. There are other financing flows that are common to more than one source of financing.

Source: FAO, IFAD, UNICEF, WFP and WHO. 2024. *The State of Food Security and Nutrition in the World 2024 – Financing to end hunger, food insecurity and malnutrition in all its forms.* Rome. https://doi.org/10.4060/cd1254en. Cited from: FAO, IFAD, UNICEF, WFP, WHO and ESCWA. 2024. *Near East and North Africa – Regional Overview of Food Security and Nutrition 2024: Financing the transformation of agrifood systems*. Cairo. https://doi.org/10.4060/cd3550en

Table 2 outlines four categories of financing flows. Public domestic resources include government spending and lending through national development banks, while public foreign resources cover official development assistance and other transfers. Private domestic resources consist of household consumption and investment by farmers, enterprises and local banks, whereas private foreign resources include multinational agribusinesses, foreign direct investment, remittances and portfolio flows. *SOFI 2024* also provides a glossary of terms such as blended finance, capital markets and securities. By setting out a clear typology, the framework gives policymakers a structured view of financing options for FSN and how these can be aligned with national priorities. This approach helps governments assess the composition of resources and identify opportunities to mobilize or redirect flows more effectively.

SOFI 2024 adopts the new definition for FSN financing presented in The State of Food Security and Nutrition in the World 2024, which is comprised of core and extended definitions. The core definition focuses on flows that directly support the four food security dimensions: availability, access, utilization and stability. Availability concerns physical supply through production, reserves and trade; access depends on household purchasing power and inequality; utilization reflects dietary diversity and links to health and sanitation; and stability ensures these conditions are maintained over time despite shocks. The extended definition broadens the framework to include determinants of health such as care practices, health services and environmental conditions. Figure 5 illustrates this model, showing how financing must support both food supply and the wider systems that sustain long-term nutrition outcomes.

Figure 5. A conceptual diagram of the new definition of financing for food security and nutrition to end hunger and food insecurity (SDG Target 2.1) and all forms of malnutrition (SDG target 2.2)



Source: FAO, IFAD, UNICEF, WFP and WHO. 2024. *The State of Food Security and Nutrition in the World 2024 – Financing to end hunger, food insecurity and malnutrition in all its forms*. Rome. https://doi.org/10.4060/cd1254en. Cited from: FAO, IFAD, UNICEF, WFP, WHO and ESCWA. 2024. *Near East and North Africa – Regional Overview of Food Security and Nutrition 2024: Financing the transformation of agrifood systems*. Cairo. https://doi.org/10.4060/cd3550en

The extended definition of financing addresses both immediate needs and the structural drivers of food insecurity and malnutrition. These include conflict, climate shocks, economic slowdowns and persistent barriers such as the high cost of nutritious food, unhealthy food environments and inequality. Figure 5 highlights six pathways: advancing the humanitarian–development–peace nexus; building climate and economic resilience; lowering the cost of nutritious food; fostering healthy food environments; and reducing inequality. Financing for FSN must, therefore, be multidimensional, providing short-term protection against hunger while supporting long-term transformation of agrifood systems towards greater resilience, inclusivity and nutrition sensitivity.

Major drivers of food insecurity and malnutrition in Arab States

Food insecurity and malnutrition in the Arab States are the result of a complex web of immediate shocks and structural constraints that interact to push millions into vulnerability. *The State of Food Security and Nutrition in the World 2021* identified four principal drivers of food insecurity: conflict; climate variability and extremes; economic slowdowns and downturns; and deeper structural issues, such as the unaffordability of nutritious foods, unhealthy food environments and high inequality. Each of these drivers requires tailored policy responses, which the international community has grouped into six transformative pathways (Figure 6).

Figure 6. Addressing the major drivers and structural factors of food insecurity and malnutrition

Source: FAO, IFAD, UNICEF, WFP and WHO. 2024. *The State of Food Security and Nutrition in the World 2024 – Financing to end hunger, food insecurity and malnutrition in all its forms*. Rome. https://doi.org/10.4060/cd1254en. Cited from: FAO, IFAD, UNICEF, WFP, WHO and ESCWA. 2024. *Near East and North Africa – Regional Overview of Food Security and Nutrition 2024: Financing the transformation of agrifood systems*. Cairo. https://doi.org/10.4060/cd3550en

These transformative pathways include integrating humanitarian, development and peace-building policies in conflict-affected contexts; scaling up climate resilience across agrifood systems; strengthening the economic resilience of the most vulnerable; intervening in supply chains to reduce the cost of nutritious food; shifting food environments towards healthier dietary patterns; and tackling structural inequalities to ensure inclusiveness. Taken together, these measures offer a comprehensive framework that links urgent responses to longer-term transformation. For example, in conflict situations, interventions need to go beyond emergency food aid, embedding nutrition-sensitive social protection and rebuilding resilient local supply chains. Likewise, in climate-affected areas, early warning systems, climate insurance and investments in water management can help communities absorb shocks. Yet, these measures remain underutilized, and in the absence of financing on an appropriate scale, countries remain exposed to recurring crises that deepen hunger and malnutrition.

The increasing frequency and intensity of major drivers and income inequality in Arab countries

Over the past two decades, Arab States have seen a steady rise in the main drivers of food insecurity. Conflict has been the most prominent driver, with both the number of conflicts and years countries spend exposed to violence increasing significantly since 2003. Climate extremes have also become more frequent, with more countries experiencing multiple shocks such as heat waves, floods, droughts and storms, leading to a higher proportion of years affected by at least one extreme event. Economic volatility has added further pressure, as repeated downturns and swings in GDP (gross domestic product) per capita growth have left households vulnerable to sudden income losses. Although inequality has declined slightly, it remains high, and extreme poverty continues to affect large population groups. These drivers interact and compound one another, leaving conflict-

affected or climate-stressed countries especially vulnerable when global commodity prices spike. Addressing them requires financing that tackles immediate needs while reducing long-term vulnerabilities.

The combined effect of conflict, climate extremes and economic volatility has driven a steep rise in undernourishment across Arab States over the past decade. Since 2013, countries exposed to these shocks have recorded much faster increases in the prevalence of undernourishment than those less affected. Conflict has been the most damaging driver, displacing populations, destroying agricultural assets and cutting households off from markets. Economic downturns have repeatedly reduced household incomes, limited fiscal space and forced governments to scale back food subsidies. Climate extremes, including prolonged droughts and more frequent floods, have disrupted local food production, reduced pasture availability and increased reliance on imports. Inequality has compounded these pressures by limiting access to nutritious food for poorer households.

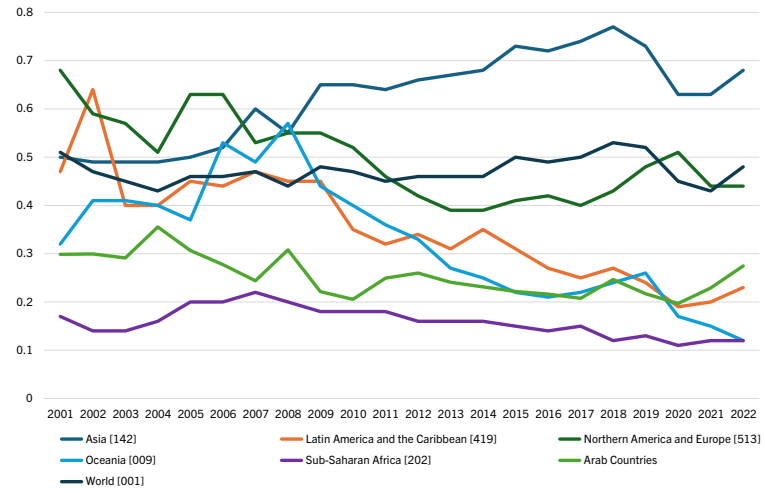
Current level of financing in the Arab region

SOFI 2024 undertakes the mapping of the current financing of food security and nutrition. Based on its findings, the broader agriculture sector (agriculture, food, forestry and fishing sectors) in Arab countries received USD 28.4 billion in financing in 2021, the majority of which was bank credit (USD 12.8 billion) and government expenditure (USD 10.4 billion), with a smaller part of development financing for food consumption (USD 4.9 billion) and a tiny share of foreign direct investment (USD 0.3 billion). This estimate of current financing does not include consumer spending and financial flows through food trade and retail, which benefit local agrifood systems. It also excludes government spending on social protection and health services, as not all of these expenditures relate to food security and nutrition.

Government spending on agriculture, forestry and fishing

Government expenditure on agriculture, forestry and fishing (AFF) in the Arab region has historically been limited compared to the sector's economic weight, as reflected in the Agriculture Orientation Index (AOI). For most of 2001–2020, the regional AOI lagged behind all other regions except sub-Saharan Africa, indicating that agriculture consistently received a smaller share of public budgets than its share of GDP. Although AFF expenditure nearly quadrupled in nominal terms between 2001 and 2022, its share of total government spending more than halved during the same period, pointing to a weakening budgetary orientation. A modest reversal emerged after 2020, as governments responded to shocks caused by the COVID-19 pandemic and climate pressures, with the regional AOI rising to 0.27 in 2022, though still well below the global average of 0.48 (Figure 7).

Figure 7. Agriculture orientation index in different world regions

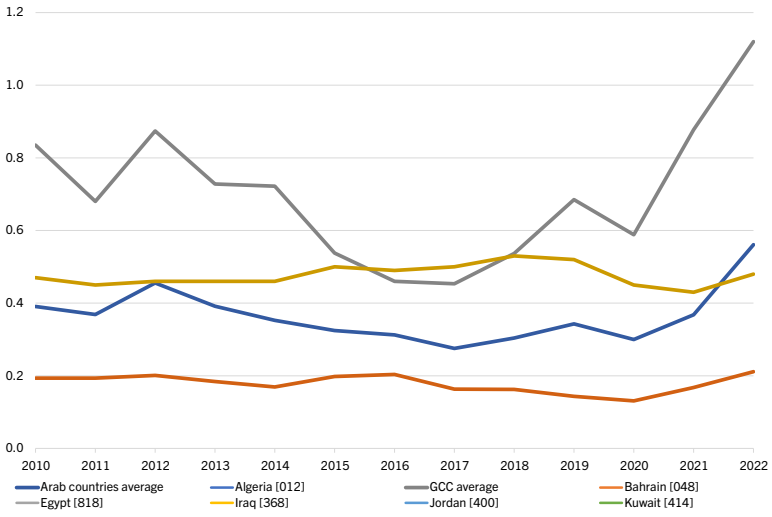


Note: Asia includes Arab countries in Western Asia.

Sources: FAO, IFAD, UNICEF, WFP, WHO and ESCWA. 2024. Near East and North Africa – Regional Overview of Food Security and Nutrition 2024: Financing the transformation of agrifood systems. https://doi.org/10.4060/cd3550en

Trends vary widely across countries. GCC members, where agriculture accounts for only a small fraction of the GDP, typically report higher AOIs, but this partly reflects the statistical effect of a small denominator rather than large-scale commitments. By contrast, countries where agriculture exceeds 10 percent of the GDP, such as Algeria, Egypt, Mauritania, Morocco and Tunisia, tend to post AOIs below the world average, underscoring persistent underinvestment relative to the sector's importance. In 2022, Tunisia, Morocco and Mauritania devoted the highest AFF budget shares in the region, each above 4 percent of the total expenditure, yet these levels still fell short of parity with agriculture's contribution to the economy. The picture is one of rising nominal expenditure but a continuing gap in budget orientation, suggesting that aligning public spending more closely with agriculture's economic and social significance remains a major policy challenge (Figure 8, Figure 9 and Figure 10).

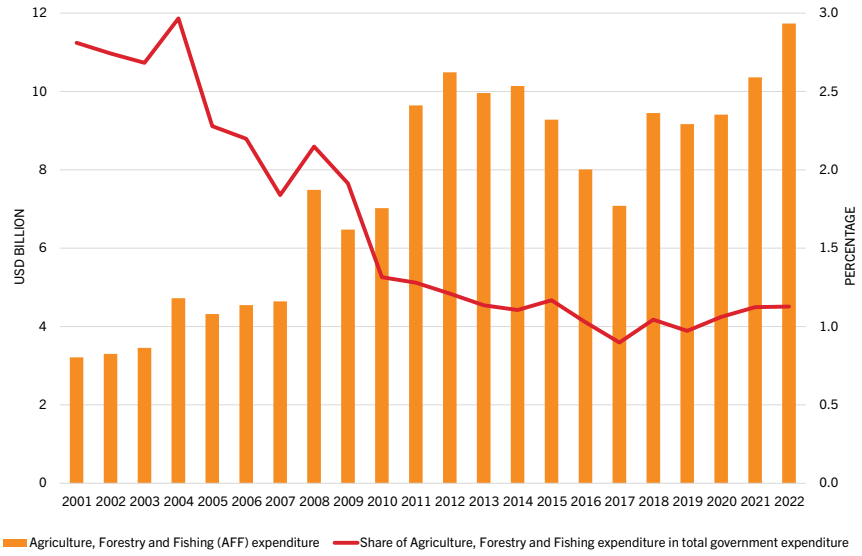
Figure 8. Agriculture orientation index for government expenditures in Arab countries



Note: Gulf Cooperation Council (GCC) countries include Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and United Arab Emirates countries.

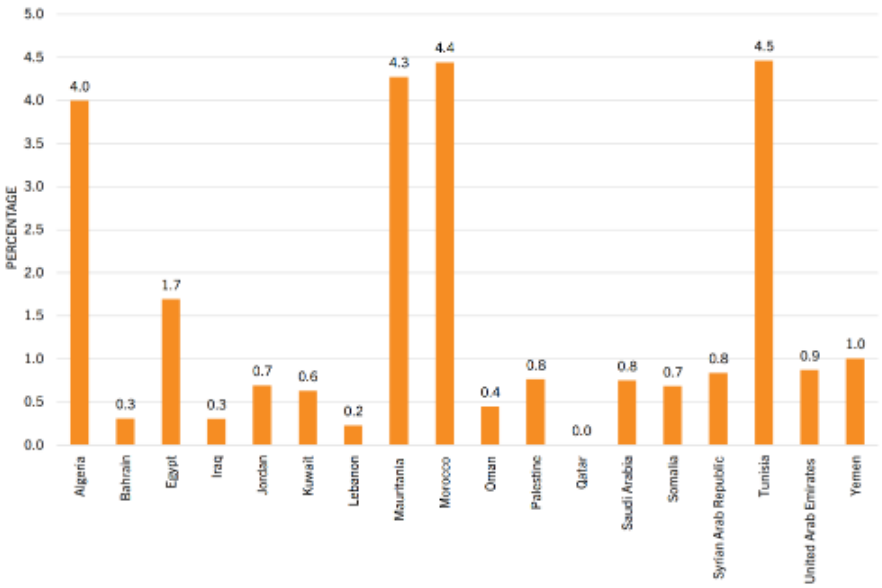
Source: FAO, IFAD, UNICEF, WFP, WHO and ESCWA. 2024. *Near East and North Africa – Regional Overview of Food Security and Nutrition 2024: Financing the transformation of agrifood systems*. Cairo. https://doi.org/10.4060/cd3550en

Figure 9. Share of agriculture, forestry and fishing in total government expenditure in the Arab region



Source: FAO, IFAD, UNICEF, WFP, WHO and ESCWA. 2024. *Near East and North Africa – Regional Overview of Food Security and Nutrition 2024: Financing the transformation of agrifood systems*. Cairo. https://doi.org/10.4060/cd3550en

Figure 10. The share of agriculture, forestry and fishing expenditures in total government expenditures in Arab countries (2022) (percentage)



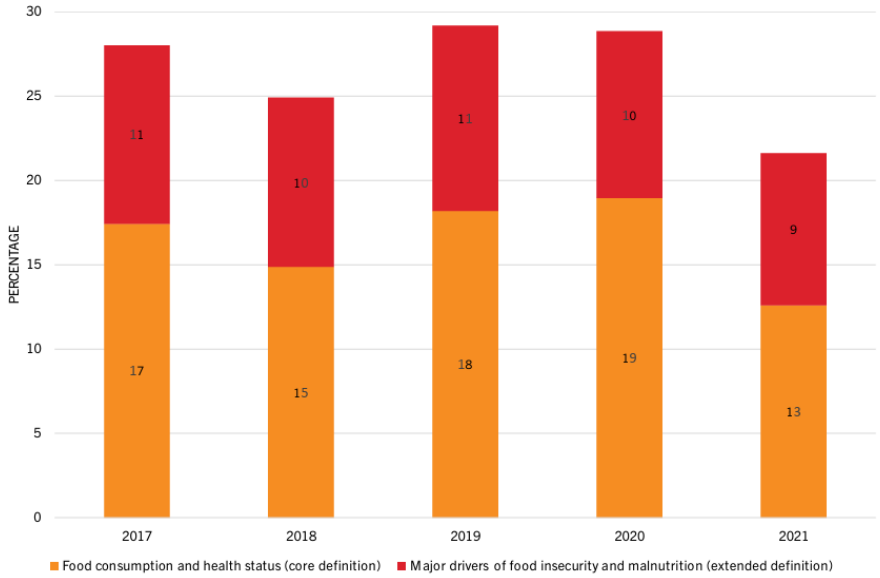
Note: No data is available for the Comoros, Djibouti, Libya and the Sudan.

Source: FAO, IFAD, UNICEF, WFP, WHO and ESCWA. 2024. *Near East and North Africa – Regional Overview of Food Security and Nutrition 2024: Financing the transformation of agrifood systems*. Cairo. https://doi.org/10.4060/cd3550en

International development funding flows for food security and nutrition

Applying the core and extended definitions of financing to the Organisation for Economic Co-operation and Development (OECD) Creditor Reporting System (CRS) and the AidData database records for 2017 to 2021 shows that less than one third of development flows to Arab countries targeted food security and nutrition. On average, these flows declined by 1 percent across the period, while total official development assistance (ODA) and other official flows (OOF) to all sectors grew by 6 percent. In 2020, the second year of the pandemic, food security and nutrition related ODA and OOF contracted by 15 percent, even as all ODA and OOF rose by 13 percent. In 2021, the total ODA and OOF to the region reached USD 54 billion, of which 22.2 percent, or USD 12 billion, went to food security and nutrition, and 91.7 percent of that amount was ODA (Figure 11).

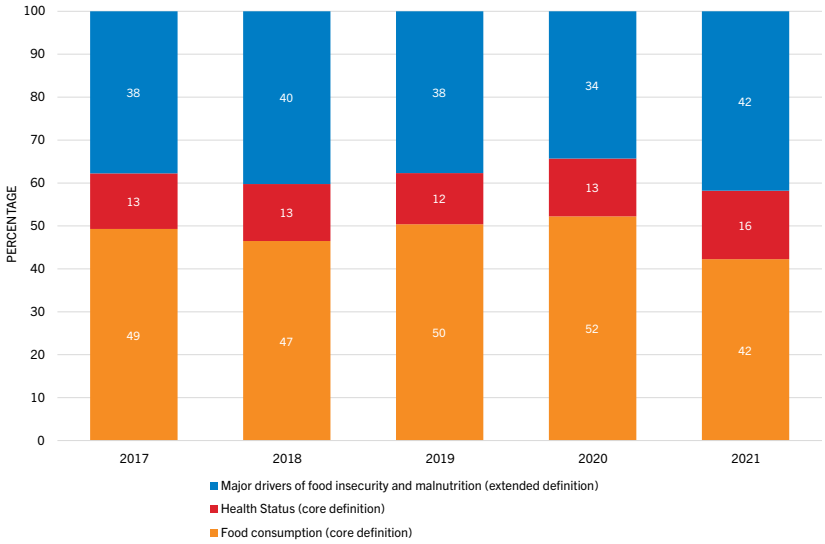
Figure 11. Share of food security and nutrition in global official development assistance and other official flows in the Arab region (percentage)



Sources: FAO based on the application of the methodology in *The State of Food Security and Nutrition 2024*. Supplementary material to Chapter 4 S4.3 using amounts of flows in constant 2021 USD billion from OECD. 2024. OECD Data Explorer. [Accessed on 24 July 2024]. https://data-explorer.oecd.org/?fs%5b0%5d=T%2Co&pg=0&fc=Topic&bp=true&snb=580; AidData. 2024. Data. [Accessed on 24 July 2024]. https://www.aiddata.org/datasets. Cited from: FAO, IFAD, UNICEF, WFP, WHO and ESCWA. 2024. *Near East and North Africa – Regional Overview of Food Security and Nutrition 2024: Financing the transformation of agrifood systems*. Cairo. https://doi.org/10.4060/cd3550en

Compositionally, the bulk of food security and nutrition financing supported food consumption and health under the core definition, averaging 16.4 percent of all aid flows, while 10.1 percent addressed major drivers under the extended definition (Figure 11). Within food security and nutrition, an average of 48.1 percent supported food consumption, 13.5 percent supported health status and 38.4 percent targeted drivers, with the share for food consumption falling by ten percentage points to 42 percent from 2020 to 2021, matching the drivers share in 2021 (Figure 12).

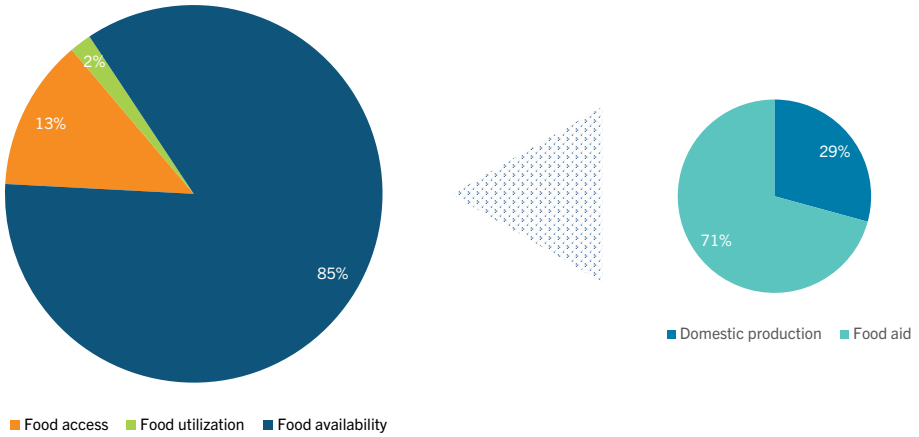
Figure 12. Composition of official development assistance and other official flows for food security and nutrition in Arab countries, 2017–2021



Sources: FAO based on the application of the methodology in *The State of Food Security and Nutrition 2024*. Supplementary material to Chapter 4 S4.3 using amounts of flows in constant 2021 USD billion from OECD. 2024. OECD Data Explorer. [Accessed on 24 July 2024]. https://data-explorer.oecd.org/?fs[0]=T%2Co&pg=0&fc=Topic&bp=true&snb=580; AidData. 2024. Data. [Accessed on 24 July 2024]. https://www.aiddata.org/datasets. Cited from: FAO, IFAD, UNICEF, WFP, WHO and ESCWA. 2024. *Near East and North Africa – Regional Overview of Food Security and Nutrition 2024: Financing the transformation of agrifood systems*. Cairo. https://doi.org/10.4060/cd3550en

Food consumption funding went primarily to food availability, at 85 percent, of which 71 percent was for food aid and 29 percent supported domestic production, while 13 percent of food consumption funding was for food access and 2 percent for utilization (Figure 13).

Figure 13. Composition of official development assistance and other official flows for food consumption in Arab countries (annual average, 2017–2021)



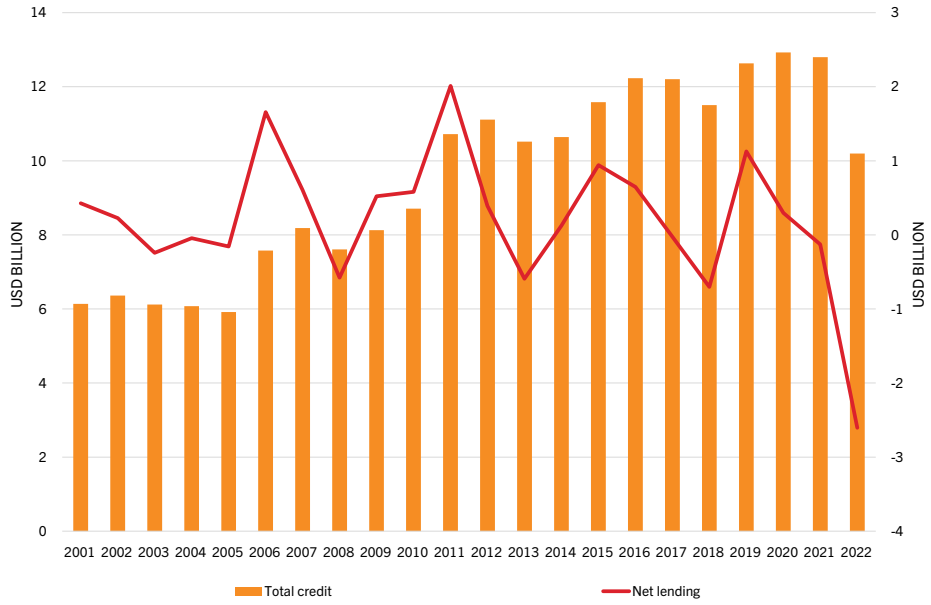
Note: Annual average flows for food consumption, health and drivers of food insecurity and malnutrition are included in Table 10 of the Regional Overview.

Sources: FAO based on the application of the methodology explained in *The State of Food Security and Nutrition 2024*. Supplementary material to Chapter 4 S4.3 using amounts of flows in constant 2021 USD billion from OECD. 2024. OECD Data Explorer. [Accessed on 24 July 2024]. https://data-explorer.oecd.org/?fs[0]=T%2Co&pg=0&fc=Topic&bp=true&snb=580; AidData. 2024. Data. [Accessed on 24 July 2024]. https://www.aiddata.org/datasets. Cited from: FAO, IFAD, UNICEF, WFP, WHO and ESCWA. 2024. *Near East and North Africa – Regional Overview of Food Security and Nutrition 2024: Financing the transformation of agrifood systems*. Cairo. https://doi.org/10.4060/cd3550en

Credit to agriculture, forestry, fishing

Access to credit is essential for the sustainability and growth of agriculture, forestry and fishing, as it enables farmers and agribusinesses to finance inputs, machinery and infrastructure, while helping them cover costs until their products reach the market. In the Arab region, the value of formal credit to the sector reached almost USD 13 billion in 2020 before falling back in 2021 and 2022, a decline that was partly influenced by gaps in reporting from several countries but also by wider macroeconomic instability (Figure 14).

Figure 14. Credit to agriculture, forestry and fishing in the Arab region (total credit: left axis, net lending: right axis) (billion USD, 2015 prices)

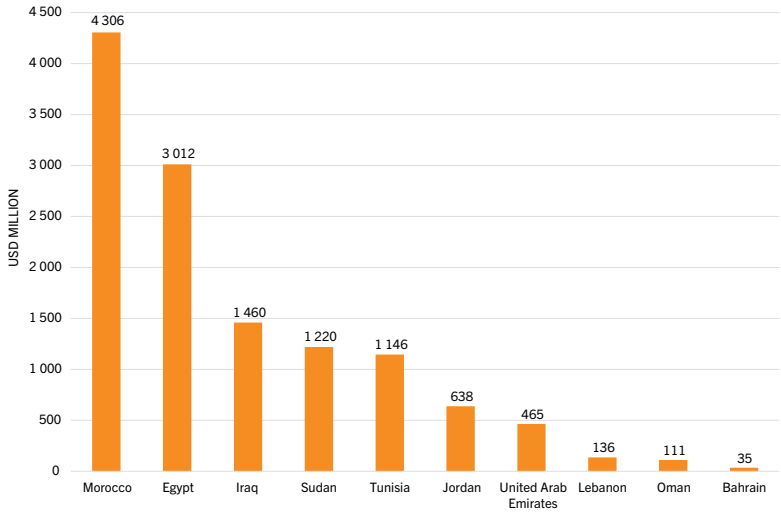


Notes: Bars indicate stock of credit (total credit). Net lending, indicated by the line, can be estimated by the change in stock from one year to the next. This shows the new credit flows into (or credit outflows from) the agriculture sector.

Source: FAO, IFAD, UNICEF, WFP, WHO and ESCWA. 2024. *Near East and North Africa – Regional Overview of Food Security and Nutrition 2024: Financing the transformation of agrifood systems*. Cairo. https://doi.org/10.4060/cd3550en

The bulk of this financing was concentrated in a handful of countries, with Morocco leading at more than USD 4 billion, followed by Egypt at around USD 3 billion, while others such as Lebanon, Oman and Bahrain recorded minimal amounts (Figure 15). For countries like the Sudan and Iraq, credit flows were particularly critical given the sector's larger role in their economies, yet the real value of these loans was often undermined by depreciation and inflation.

Figure 15. Total credit in the agriculture, forestry and fishing sector (2021, million USD)

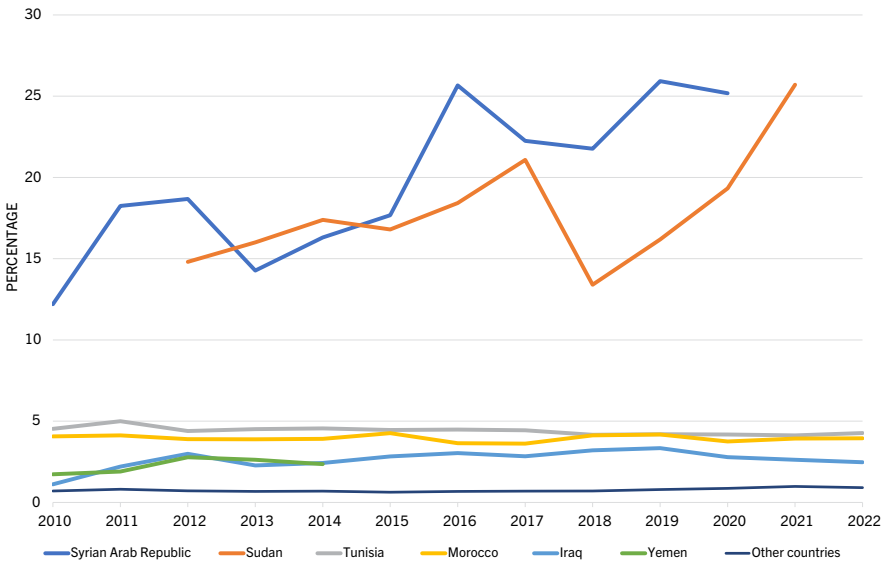


Note: There was no data available in July 2024 in FAOSTAT for 2021 for Algeria, the Comoros, Djibouti, Kuwait, Libya, Mauritania, Palestine, Qatar, Saudi Arabia, Somalia, the Syrian Arab Republic and Yemen.

Source: FAO, IFAD, UNICEF, WFP, WHO and ESCWA. 2024. *Near East and North Africa – Regional Overview of Food Security and Nutrition 2024: Financing the transformation of agrifood systems*. Cairo. https://doi.org/10.4060/cd3550en

Despite these volumes, agriculture's share of overall credit in the region has remained strikingly low. On average, the sector received only 4.3 percent of total credit between 2010 and 2022, a level that reflects persistent underinvestment relative to its importance. The exceptions were the Sudan and the Syrian Arab Republic, where agriculture accounted for roughly a quarter of total credit, corresponding with the sector's larger contribution to GDP (Figure 16).

Figure 16. Share of credit to agriculture, forestry and fishing in total credits

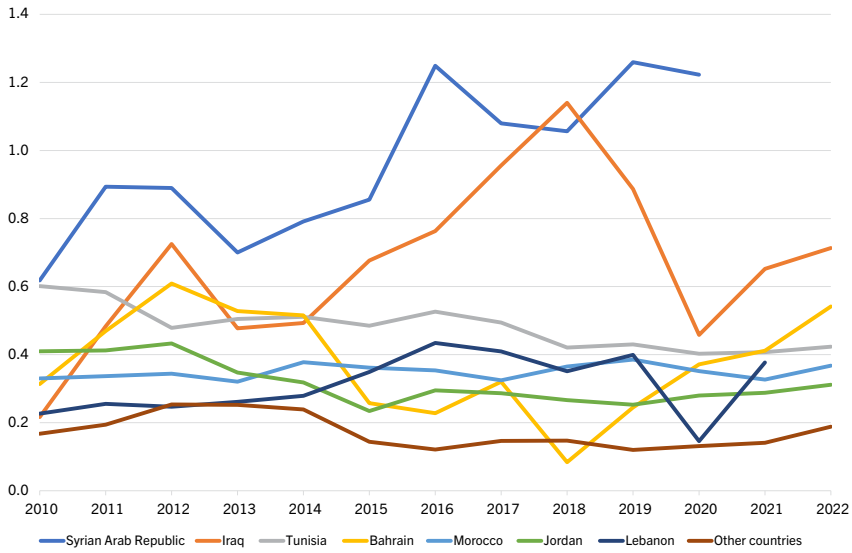


Note: Other countries include Bahrain, Egypt, Jordan, Lebanon, Oman and the United Arab Emirates. No data is available in FAOSTAT for Algeria, the Comoros, Djibouti, Kuwait, Libya, Mauritania, Palestine, Qatar, Saudi Arabia and Somalia.

Source: FAO, IFAD, UNICEF, WFP, WHO and ESCWA. 2024. *Near East and North Africa – Regional Overview of Food Security and Nutrition 2024: Financing the transformation of agrifood systems*. https://doi.org/10.4060/cd3550en

The AOI for credit reinforces this picture: in most countries it remains below one, indicating that agriculture consistently receives less financing than its economic weight would justify. Only the Syrian Arab Republic in recent years and Iraq in 2018 recorded values above one (Figure 17). This imbalance continues to limit the capacity of Arab agriculture to expand, modernize and adapt to the mounting pressures of climate change and rising production costs.

Figure 17. Agriculture orientation index of credit to agriculture in Arab countries (2010–2022)



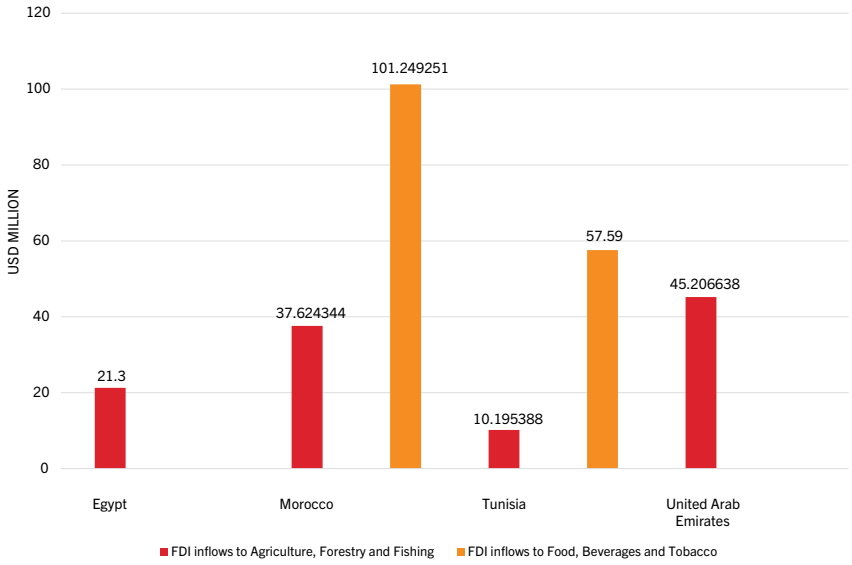
Note: Other countries include Egypt, Oman and the United Arab Emirates. The value for AOI of credit for other countries is calculated from the simple average of the AOI of credit of the three countries. Data is not available on FAOSTAT for Iraq and the Sudan. Data is not available on FAOSTAT for Qatar from 2003, for Yemen from 2015.

Source: FAO, IFAD, UNICEF, WFP, WHO and ESCWA. 2024. *Near East and North Africa – Regional Overview of Food Security and Nutrition 2024: Financing the Transformation of Agrifood Systems*. https://doi.org/10.4060/cd3550en

Foreign direct investment inflows

Foreign direct investment (FDI) plays an important role in creating lasting ties between economies, as it involves long-term stakes in enterprises that extend beyond short-term financial flows. In the Arab region, however, FDI inflows into agriculture, forestry and fishing, as well as into the food, beverages and tobacco industries, remain relatively modest when compared with other sources of financing. The most comprehensive data available, covering 2016, shows that the total FDI to these sectors reached only USD 273.2 million, a sum that underscores its limited weight in the overall financing landscape (Figure 18).

Figure 18. Foreign direct investment inflows into agriculture, forestry and fishing, and food, beverages and tobacco (2016, million USD)



Note: Most comprehensive data for FDI for the region was available in FAOSTAT for 2016. No data for 2016 was available in FAOSTAT for the other countries in the region.

Source: FAO, IFAD, UNICEF, WFP, WHO and ESCWA. 2024. *Near East and North Africa – Regional Overview of Food Security and Nutrition 2024: Financing the Transformation of Agrifood Systems*. https://doi.org/10.4060/cd3550en

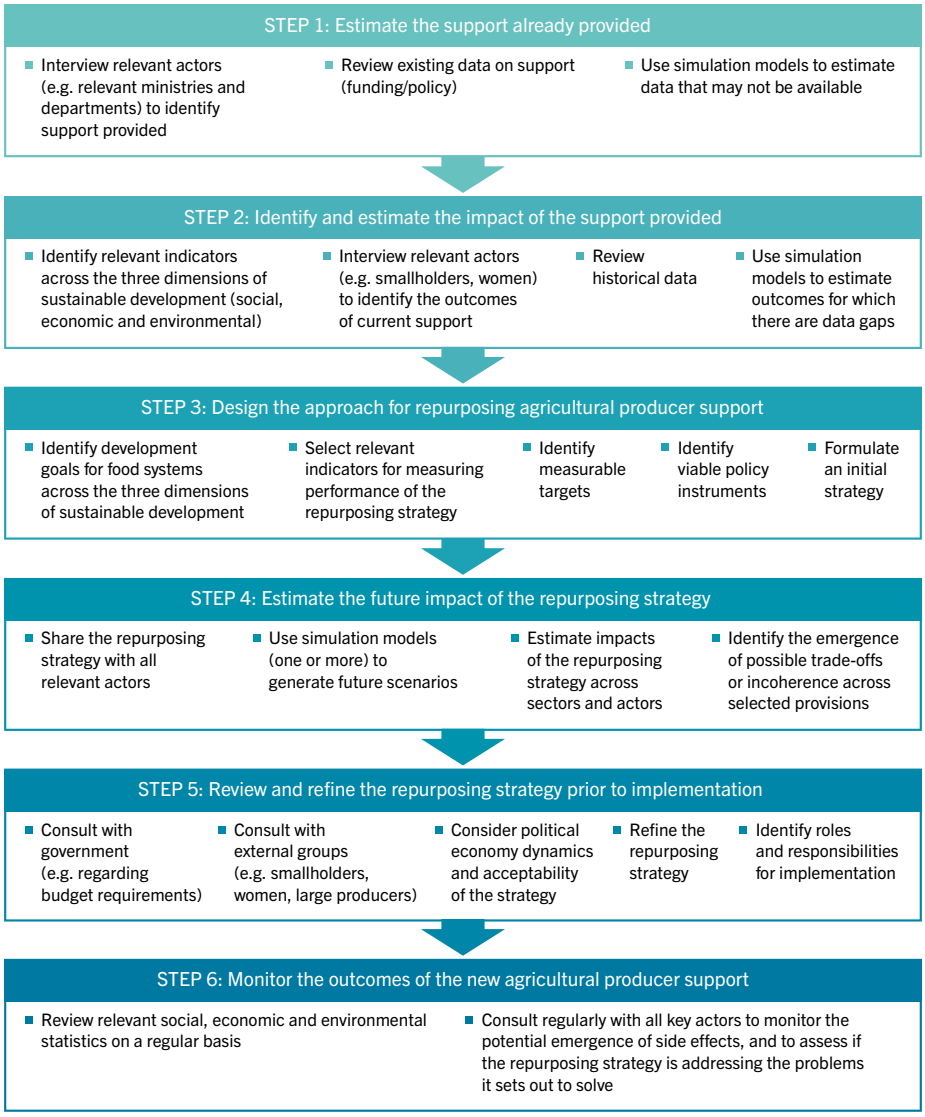
Within this total, most investment was directed towards food, beverages and tobacco, which absorbed 58 percent of inflows, while agriculture, forestry and fishing accounted for the remaining 42 percent. Egypt, Morocco, Tunisia and the United Arab Emirates were among the main destinations, although the levels remained modest in absolute terms. The relatively low magnitude of FDI into agrifood systems highlights a structural gap: while the region depends heavily on imports and requires substantial investment to modernize its food production and processing capacity, it has yet to attract significant foreign capital into these areas. Without stronger FDI engagement, opportunities to upgrade value chains, improve technology adoption and expand export potential remain constrained.

Repurposing public support for the transformation of agrifood systems

A conceptual framework for reform

Public expenditure is one of the main levers available to governments in the NENA region, yet much of it has historically reinforced inefficiency, inequity and environmental stress. Repurposing support means reducing measures that distort production or trade and reallocating resources towards public goods that improve food security, nutrition and sustainability. *SOFI 2024* emphasizes shifting from subsidies to investments in research, infrastructure, risk management and extension services, which, although slower to deliver visible outcomes, create durable improvements in productivity and resilience. Illustrated in Figure 19, the framework outlines six steps: a) estimating current levels of support and their impacts; b) designing alternatives; c) projecting outcomes; d) refining strategies through consultation; and e) monitoring progress. Inclusive participation is central, as reform requires the engagement of ministries, producer groups, women and smallholders. Sudden cuts without safeguards risk destabilizing rural communities, so the framework stresses gradualism, sequencing and compensatory measures such as targeted cash transfers.

Figure 19. Six steps for repurposing and reforming agricultural producer support



Source: FAO, UNDP and UNEP. 2021. A multi-billion-dollar opportunity – Repurposing agricultural support to transform food systems. Rome, FAO. https://doi.org/10.4060/cb6562en. Cited from: FAO, IFAD, UNICEF, WFP, WHO and ESCWA. 2024. *Near East and North Africa – Regional Overview of Food Security and Nutrition 2024: Financing the Transformation of Agrifood Systems*. https://doi.org/10.4060/cd3550en

The framework also highlights trade-offs that must be managed carefully. Cutting subsidies for staple crops may free fiscal space but risk raising food prices unless offset by protective measures. Water subsidies, for instance, reduce short-term costs but accelerate depletion of scarce groundwater. Input subsidies raise yields, yet often encourage the overuse of fertilizers and pesticides. Recognizing these tensions is vital for designing alternatives that balance fiscal savings with equity and sustainability.

The approach is not presented as a fiscal adjustment but as a structured process of shifting incentives to align with nutrition and environmental goals. The case for reform is evident in the region's current subsidy landscape. Support has often been poorly targeted, promoting overconsumption of calorie-dense staples while discouraging more diverse diets. Fertilizer and energy subsidies have boosted yields but encouraged wasteful input use, undermining soil quality and food safety. Water subsidies have promoted unsustainable irrigation in the most water-scarce region in the world. Output subsidies and price supports, especially for wheat, have secured supplies but diverted resources from high-value, nutrition-rich crops. Consumer subsidies for bread, sugar and oil have

improved calorie access but entrenched unhealthy diets and disproportionately benefited wealthier households.

Policies for repurposing

Input subsidies are among the most common instruments in the region. By lowering the cost of seeds, fertilizers and energy, they have increased yields and secured food supplies but also displaced private providers and encouraged dependency. Repurposing them towards climate-smart inputs such as organic fertilizers, biofertilizers or stress-tolerant crops could address both environmental and nutritional priorities. Egypt's system of targeting subsidies to smallholders and the United Arab Emirates' conditional support for sustainable practices show how reforms can be structured. Water subsidies pose an even sharper dilemma. Low irrigation tariffs reduce costs but encourage excessive use and delay investment in efficiency. Redirecting these resources towards desalination, irrigation modernization and water harvesting could reduce waste and improve resilience. To protect farmer livelihoods, governments could pair such reforms with decoupled income support or incentives for drought-resistant crops, as seen in Libya and Morocco. Output subsidies and market price support, particularly for wheat, have long been used to stabilize incomes and guarantee supply. While these policies reduce risks for farmers, they have encouraged reliance on a crop with low competitiveness and high-water intensity. In Egypt and Tunisia, procurement at administered prices has tied large fiscal resources to wheat, while in Saudi Arabia subsidies became unsustainable and were later scaled back. Repurposing could redirect funds towards horticulture and other nutrient-rich crops that improve diets and provide better returns for farmers. Such a shift would also diversify production systems, reducing pressure on water resources and improving resilience to global commodity shocks.

Consumer subsidies remain the most politically sensitive category. Bread, sugar and oil subsidies are deeply entrenched in Egypt, Morocco and Tunisia, where they form a cornerstone of social policy. While they ensured calorie access, they have contributed to poor diet quality and inequitable benefit distribution. Repurposing these subsidies into targeted cash transfers would give households flexibility to diversify consumption while maintaining protection for the most vulnerable. Transfers could be linked to nutritional education or tied to health and education outcomes to generate broader gains. International models provide lessons: Brazil's Bolsa Família demonstrates how conditional cash transfers can improve food access and human capital together. Gradual introduction of similar approaches in Arab States could reduce dependence on calorie-dense staples, improve nutrition and align social protection with long-term development goals. Combining consumer subsidy reform with parallel investments in markets and extension services would ensure that households not only receive cash support but also have access to healthier, more affordable food options.

Strengthening productive and social investments

SOFI 2024 emphasizes that fiscal space created through subsidy reform should be redirected into investments that drive long-term transformation of agrifood systems rather than used simply to reduce expenditure. Priority areas include research and development (R&D), extension services, infrastructure, social protection and decoupled payments. R&D is particularly critical, with global evidence showing it delivers some of the highest returns of any agricultural investment. For NENA countries, advancing work on drought-resistant crops, water-efficient technologies and genetic resource preservation can directly improve food security while safeguarding biodiversity. The establishment of the Saudi Plant Genetic Resources Bank, accredited in 2023, demonstrates how regional initiatives can protect valuable genetic pools while providing farmers access to improved varieties. Morocco has also invested in stress-tolerant cereals as part of its Green Morocco Plan, showing how national strategies can link R&D to long-term climate adaptation. Extension services complement these efforts by transferring knowledge to the farm level. Yet advisory systems across

the region have been underfunded, limiting the adoption of modern practices. Expanding extension, including through digital channels, can improve uptake of climate-smart techniques, integrated pest management, and nutrition-sensitive cropping, though digital tools must be designed to include poorer farmers and women with limited access to technology. Infrastructure remains another critical area. Irrigation modernization, desalination and water harvesting are essential in one of the world's most water-scarce regions, while investments in transport, cold chains and storage reduce food loss and improve market access. Strengthening cross-border trade infrastructure is equally important, as import-dependent Arab states suffer from costly port delays and customs inefficiencies that erode competitiveness. Redirecting fiscal resources towards these productive areas would enhance resilience, reduce waste and expand access to diverse and nutritious foods across the region.

Social protection provides the mechanism to link fiscal reform with equity. Programmes such as Egypt's Takaful and Karama cash transfers show how targeted approaches can improve welfare and diet quality while allowing a gradual phasing out of universal commodity subsidies. Evidence indicates these transfers not only reduce poverty but also shift consumption towards healthier foods such as dairy, fish and vegetables. Tunisia has piloted similar schemes in rural areas, combining cash transfers with training on nutrition-sensitive agriculture to reinforce outcomes. Combining social protection with efforts to diversify rural incomes through off-farm employment in processing, agritourism, or renewable energy can further stabilize livelihoods and reduce vulnerability to shocks. Decoupled payments, which provide income support without distorting production, offer another avenue. Tailored schemes can incentivize sustainable practices like soil preservation, water conservation or agroecology while remaining World Trade Organization-compliant. Unlike traditional subsidies, these payments maintain farmer income while promoting environmental goals. In Jordan, for example, pilot programmes have tested conditional transfers linked to adoption of efficient irrigation methods, showing how fiscal tools can support resource management. Together, social protection and decoupled payments demonstrate how fiscal space created through repurposing can be reinvested in ways that stabilize livelihoods, strengthen sustainability and improve diets. *SOFI 2024* stresses that these policies, though less visible than consumer subsidies, hold the highest long-term returns in terms of productivity, resilience and equity, making them central pillars of agrifood system transformation.

Sources of capital and innovative financial Instruments for agrifood systems transformation

Capital underpins every stage of agrifood systems, encompassing financial, physical, human and social assets that sustain production, processing and distribution. In the NENA region, access to capital is a critical determinant of resilience to shocks and inclusiveness in delivering food security. Investment capital plays a key role in financing enterprises, expanding services and building infrastructure, complementing public funding rather than replacing it. It enters through instruments such as debt, equity, Islamic finance and pre-financing tied to results, each with specific advantages and risks. Farmers require credit for inputs and equipment, suppliers need capital to expand provision of fertilizers and seeds, traders and processors use finance to reduce post-harvest losses and add value, and distributors need investment to build networks that ensure reliable supply. Large-scale infrastructure, such as irrigation systems, storage and cold chains, depends on long-term financing, while cooperatives and incubators pool resources and spread risk. In each case, the availability of capital directly shapes productivity, affordability and resilience. Yet the region suffers from severe financing constraints, with credit penetration being among the lowest globally. Farmers and agribusinesses face high collateral requirements, weak credit rating systems and underdeveloped insurance markets. Medium-sized financing needs, often between USD 50 000 and USD 1 million, fall into a gap that is too large for microfinance and too small for institutional investors. Agriculture is widely perceived as risky because of climate variability, seasonal cycles and volatile commodity prices, making repayment unpredictable and deterring lenders. In fragile contexts, political instability and weak institutions further compound these risks, reducing investor appetite.

Macroeconomic conditions exacerbate these challenges. Liquidity crises in national banking systems, particularly in Lebanon, the Sudan and Yemen, have restricted lending even for viable borrowers. Currency devaluations and exchange rate volatility add further uncertainty in economies dependent on imports, discouraging long-term lending. These dynamics increase the cost of borrowing and limit modernization, leaving critical parts of agrifood systems undercapitalized. Concessional capital has therefore become a vital tool to reduce risks and mobilize private investment. Guarantees, subsidized interest rates and first-loss instruments are designed to make agriculture more attractive to lenders. Concessional funds also support technical assistance, helping borrowers manage loans and financial institutions design products such as crop insurance or tailored repayment schedules. Results-based financing strengthens accountability by linking disbursements to measurable outcomes in resilience or nutrition. Bilateral aid and GCC investments remain important, but international financial institutions such as IFAD (International Fund for Agricultural Development), the Islamic Development Bank and the IFC (International Finance Corporation) provide the bulk of concessional flows. Climate finance through the Green Climate Fund, Adaptation Fund, and Loss and Damage Fund adds new sources. Deployed effectively, these mechanisms not only meet immediate needs but also crowd in private capital, expanding overall resources for agrifood transformation. However, the growing role of private finance raises concerns about governance. Food systems provide public goods such as nutrition and equity, and these cannot be left entirely to markets. Over-financialization risks privileging profit-driven models that marginalize vulnerable groups. Safeguards and monitoring are needed to ensure investments align with resilience, sustainability and inclusion objectives. Women's participation in finance also remains limited, despite their key role in agriculture. Expanding women's access to credit, insurance and training would improve productivity while broadening the benefits of investment across households and communities.

Expanding access through risk-sharing and insurance

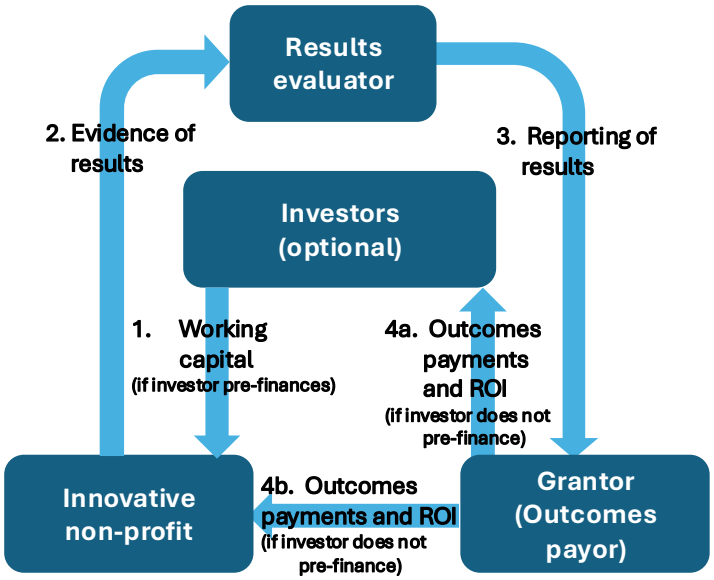
Risk-sharing mechanisms have emerged as critical instruments to close financing gaps by reducing the risk premium associated with agriculture. Guarantees, concessional co-financing and interest subsidies are among the most widely used tools, enabling banks to lend to agricultural clients without demanding excessive collateral. Lebanon's Economic and Social Fund for Development has provided default guarantees to stimulate agricultural lending, while international development finance institutions have supported guarantees through regional intermediaries. In fragile contexts such as Somalia and Palestine, concessional partners like Sweden's SIDA (Swedish International Development Cooperation Agency) have used guarantees to extend credit in high-risk environments. These mechanisms can unlock significant volumes of lending compared to the concessional resources invested, as demonstrated in Tunisia's cereal value chain project, which secured commercial loans in 2023 backed by a sovereign facility. Guarantees show how relatively small concessional commitments can leverage larger flows, but they must be managed carefully to avoid moral hazard or diversion of scarce banking capital away from other productive sectors. The leverage effect has been particularly important in contexts where agriculture faces entrenched perceptions of risk, as guarantees demonstrate that returns are achievable when risks are shared.

Insurance provides another avenue to manage risks that discourage investment. Traditional indemnity-based crop insurance is costly and administratively burdensome, leaving it inaccessible for smallholders. Index-based insurance, which pays out when indicators such as rainfall or temperature thresholds are breached, reduces costs and enables faster payouts, though basic risk remains a challenge. Bundling insurance with savings and credit can encourage uptake among vulnerable farmers. Regional examples highlight progress and constraints. Türkiye's TARSIM public–private pool has expanded dramatically, now covering 14 percent of agricultural land compared to less than 1 percent in its early years, supported by premium subsidies and access to reinsurance markets. Morocco has piloted climate risk insurance, though uptake remains modest. In fragile settings, political risk insurance has proven important: the World Bank's Multilateral Investment Guarantee Agency has insured agribusiness investments in Palestine, protecting against expropriation, war and unrest. Outside the region, the World Food Programme's R4 Rural Resilience Initiative in Africa shows how bundling insurance with savings and credit can create integrated resilience packages. Such tools reduce perceived risk and help attract private investment into high-risk environments. While not sufficient alone, risk-sharing and insurance are essential components of the financing landscape, allowing concessional and commercial actors to operate jointly in a sector where traditional finance has long been constrained.

Linking finance to measurable outcomes

What distinguishes innovative finance instruments from traditional tools is their orientation towards results. Rather than funding inputs or activities, these instruments tie financing to the achievement of measurable development outcomes. Results-based finance, illustrated in Figure 20, exemplifies this approach. In this model, funders commit resources that are released only after an independent evaluator confirms that outcomes have been achieved. Often, a private investor provides upfront working capital to the implementer, with repayment and returns dependent on performance. This structure realigns incentives across funders, implementers and evaluators, ensuring that resources flow to initiatives that demonstrably deliver impact.

Figure 20. Results-based financing schematic flow



Note: ROI: return on investment.

Source: Authors' (FAO RNE) own elaboration. Adapted from: FAO, IFAD, UNICEF, WFP, WHO and ESCWA. 2024. *Near East and North Africa – Regional Overview of Food Security and Nutrition 2024: Financing the transformation of agrifood systems.* https://doi.org/10.4060/cd3550en

The region has begun experimenting with results-based finance, linking disbursements to outcomes rather than inputs. In Palestine, such contracts expanded youth employment, while Jordan piloted them for refugee livelihoods. The United Arab Emirates applied outcome-based models to improve opportunities for people of determination, tying funding to verified participation gains. IFAD introduced results-based lending in Morocco's mountain regions, using indicators such as the formation of producer organizations, road rehabilitation, and literacy improvements. Building on these pilots, proposals aim to expand quinoa production in Algeria, Libya, Mauritania, Morocco and Tunisia through results-based contracts. Quinoa's resilience to drought and salinity, high nutritional content and stronger income potential than wheat make it promising for climate-stressed areas. Outcome targets under consideration include production, consumption and women's participation, with penalties if inclusivity or sustainability thresholds are missed. Fiscal instruments reinforce this logic by shaping incentives and raising revenues. Several Arab states – including Bahrain, Morocco, Oman, Qatar, Saudi Arabia, Tunisia and the United Arab Emirates – have imposed excise taxes on sugary drinks and calorie-dense foods. These discourage unhealthy consumption while creating fiscal space for reinvestment in nutrition programmes. In Mexico, a similar tax cut purchases of high-calorie foods by 7 percent. In the NENA region, revenues could finance safety nets, school feeding, or maternal health initiatives, aligning fiscal tools with nutrition objectives and complementing results-based models.

Climate finance, bonds and structural innovations

Climate finance and capital market innovations are also reshaping agrifood investment. The region faces a USD 127.46 billion water financing gap for desalination, wastewater treatment, irrigation modernization and early warning systems, making access to climate funds and multilateral finance critical. Egypt issued a USD 750 million green bond to support water conservation and crop research, while Morocco raised hundreds of millions through public and private bonds for agriculture. Mexico's FIRA (Trust Funds for Rural Development) programme provides a global precedent, raising USD 410 million via sovereign-linked green bonds for farming, forestry and solar energy. Development banks such as the African Development Bank have expanded similar frameworks, while Islamic finance instruments, including green sukuk, open Sharia-compliant investment channels. Sustainability-linked bonds extend the model, adjusting borrowing costs to performance. Rwanda's pilot cut interest rates when borrowers met environmental and gender targets. Applied in the NENA region, such instruments could incentivize water efficiency and nutrition-sensitive production, provided credible metrics are in place. Carbon markets create additional revenue streams by monetizing emission reductions from agroforestry, regenerative farming or localized production. Credits improve cash flow and attract investors but must meet integrity standards to be credible, durable and effective. Weak safeguards risk undermining confidence, while strong frameworks could integrate carbon markets with bonds and climate funds to build a financing toolkit capable of addressing water scarcity, import dependence and nutrition challenges simultaneously.

Contract farming and advance market commitments continue to be crucial innovations for reducing farmer risk and fostering adoption of sustainable practices. By bundling contracts with input provision, technical assistance and guaranteed market access, such arrangements allow smallholders to adopt higher-value or more sustainable crops with confidence. The Sudanese "Gums for Adaptation and Mitigation" project exemplifies how this model can work in practice. Farmers plant gum Arabic trees that improve soil moisture, reduce emissions from land use and connect to structured markets through contracts with exporters. Debt swaps also play an important role at the macro level. By converting part of a country's sovereign debt into investments in food security or climate programmes, swaps create fiscal space while protecting essential public spending. Jordan and other regional countries have piloted such swaps, and a new regional facility has been established to help indebted members align debt relief with Sustainable Development Goals.

CONCLUSION AND THE TRANSFORMATIONAL IMPACT PARTNERSHIP

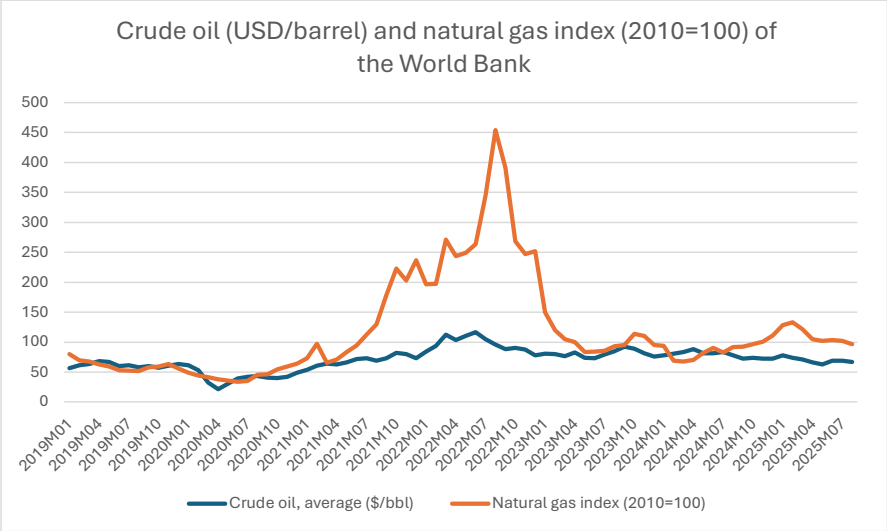
Up to trillions of US dollars per year must flow to transform worldwide agrifood systems to improve food security and nutrition in a manner that is conducive to safeguarding livelihoods, human health and the planet's well-being. The Arab region is likely to require a disproportionate per capita amount of this funding, given its unique challenges with access to water, fertile soils and the presence of destabilizing conflict in many countries. The solution to mobilize the funding required to improve food security and nutrition while protecting livelihoods and safeguarding the planet lies in repurposing current policy support and leveraging appropriate private capital that is selectively engaged and deployed. Private capital lacks sufficient incentives and acceptable risk-profiles to finance all the levers to enable agrifood systems to thrive; it also lacks certain incentives to safeguard food security and nutrition, livelihoods, human health and the planet. When private capital is combined with concessional capital from appropriate providers, through innovative financial instruments, in an appropriately regulated environment, capital can be unlocked to support an agrifood transformation that can improve food security and nutrition. Given the challenges posed by climate change, protracted crises and conflicts, and the increasing demand for food, it is not only imperative but also makes a good business proposition, for the financing partners to channel their flows towards the Arab region for ensuring food security and nutrition. Some of the potential financing flows may have been hindered by lack of structured or specialized financing vehicles and enabling regulatory systems; however, a coordinated, collective and collaborative effort, facilitated by partners such as FAO may yield positive results for transforming agrifood systems in the Arab region.

The Transformational Impact Partnership (TIP), launched during a Regional Capacity Building Workshop and Conference on "How to Finance the Transformation of Agrifood Systems?" in Tunis, Tunisia,[110] embodies this collective approach by providing the region with a dedicated platform to mobilize, align and govern financing for agrifood system transformation. Through its technical assistance consortium, TIP helps member states design and structure innovative financial instruments suited to their national contexts. Its grant fund deploys catalytic resources such as capacity-development grants, capital-loss guarantees and outcomes financing, each designed to de-risk investment and crowd in additional capital. Meanwhile, its investment fund pools contributions from development banks, international financial institutions and impact investors to finance agrifood projects through debt, equity and Islamic finance products. Together, these mechanisms ensure that financing is not only available but also accessible, inclusive and impact-oriented. By linking support to measurable outcomes in food security, nutrition, gender equity and environmental sustainability, TIP creates a system where funding flows are competitive, transparent and accountable.

As a direct response to the Cairo Declaration on Financing the Transformation of Agrifood Systems, TIP represents the transformational impact of partnership itself. It anchors ownership with member states while leveraging the expertise and resources of development banks, private investors, and technical partners. In doing so, it bridges the gap between policy ambition and financial reality, ensuring that the Arab region can unlock the scale of capital required for agrifood transformation. By catalysing both grants and investment, fostering collaborative financing platforms and embedding safeguards for inclusivity and sustainability, TIP has the potential to convert fragmented efforts into a coherent and durable financing ecosystem. Its success would not only reshape agrifood systems in the region but also provide a model for how multi-actor partnerships can deliver impact at scale, turning the urgency of today's food security crisis into a pathway for long-term resilience and prosperity.

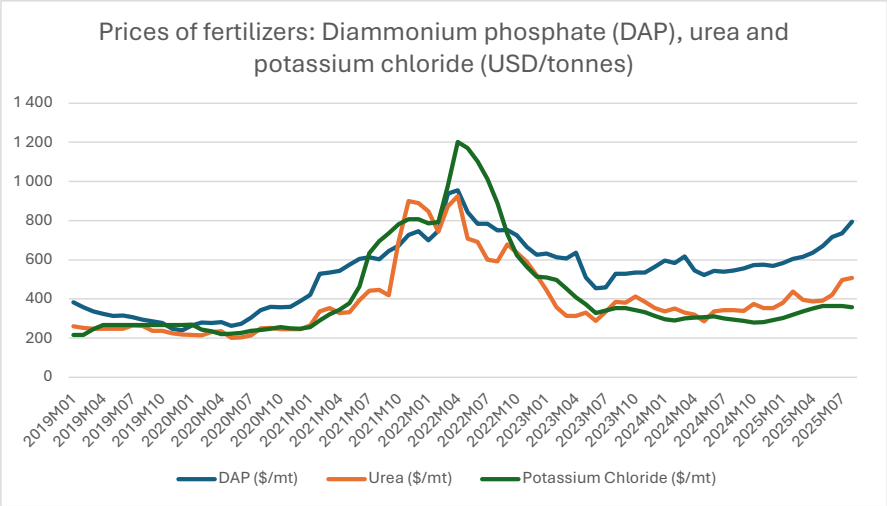
ANNEX I (FOR SECTION I)

Figure A1. Crude oil (USD/barrel) and natural gas index (2010=100) of the World Bank



Source: World Bank. 2025. Commodity Price Data (The Pink Sheet). In: *The World Bank*. Washington, DC. [Cited 7 September 2025]. https://www.worldbank.org/en/research/commodity-markets

Figure A2. Prices of fertilizers: Diammonium phosphate (DAP), urea and potassium chloride (USD/tonnes)



Source: World Bank. 2025. Commodity Price Data (The Pink Sheet). In: *The World Bank*. Washington, DC. [Cited 7 September 2025]. https://www.worldbank.org/en/research/commodity-markets

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This edition of the Food policy monitoring in the Near East and North Africa region bulletin is dedicated to our dear colleague, **Dalia Abulfotuh**, who passed away in August 2025. Dalia dedicated her career to building more inclusive, resilient and sustainable agrifood systems. She worked tirelessly to support rural communities, empower young people and expand social protection. Her work had a significant impact on policies and initiatives that continue to improve lives across the region, particularly in the areas of youth employment, territorial development and rural transformation. She is remembered by her colleagues, not only for her professional brilliance, but also for her warmth and generosity. Her legacy of service and kindness will not be forgotten.

The quarterly food policy monitoring bulletin presents recent trends in international commodity markets, domestic food price developments, and regional crop situations. It covers the latest food and trade policy measures adopted in countries of the NENA region. Each bulletin has a focus topic of strategic importance in enhancing food security and nutrition in the region.

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