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A GEOPOLITICAL PERSPECTIVE ON CORPORATE FARMING IN THE ARAB WORLD

Pierre Blanc* and Matthieu Brun**

THE SELF-IMMOLATION OF [TUNISIAN FOOD vendor] Mohamed Bouazizi on December 17, 2010 is considered the spark that set the entire Arab world ablaze. Since then, the fire has largely continued to burn. In turn, the despots have fallen (Ben Ali, Mubarak, Gaddafi), while Bashar al-Assad seems destined to end his domination over Syria, although no-one knows when. Elsewhere, the revolts have been better contained since changes in government and/or some political reforms have for the moment allowed the rulers to avoid true revolutions.

Thus, looking at a map of the Arab world and using German sociologist Max Weber's analytical categories, we have to conclude that strong regimes with charismatic legitimacy based on the emergence of a man and a system (Tunisia, Egypt, Libya, Syria, Yemen) have reached the end of a cycle, while regimes with symbolic legitimacy based on a dynastic or religious foundation (Jordan, Saudi Arabia, Qatar, Morocco) have avoided this change. While these categories are illuminating, they should be viewed cautiously. Surveying the situation, albeit superficially, we see that the most threatened governments in this revolutionary phase

are the originally charismatic Arab republics, whose historical cycle began in the 1950s. At that point, hunger for land in the countryside was a key driver of change, particularly in Iraq, Syria, and Egypt (Blanc 2012), while in Algeria, the war of independence was also a "peasant war" (Wolf 1971).¹

In the current cycle, the land question is less important, unlike that of "bread," which was posed – at least implicitly – by the measures taken by governments at the start of the uprisings. At the beginning of the 2010s, following the first political movements in the Arab world, the social response of governments who were accustomed to food revolts included a significant food component. As Zurayk (2011, 240) writes:

They thought that they could quell the popular uprisings with a few tons of bread. They did not realize that we were hungry for freedom, something they cannot buy and distribute to shut us up. This is not to say that socioeconomic realities did not play a role. Food prices were used to mobilize for the protests. But people did not rise to demand more bread. [...]

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1. In the 1950s, it was monarchies that were overthrown (Egypt in 1952, Iraq in 1958). Today, it seems that Saudi Arabia has taken significant financial action to suppress revolt. In 2011, \$200 billion was spent in various forms of aid to the population. Likewise, there has been significant movement for change in the Kingdom of Bahrain, particularly in Pearl Square, to the point of provoking the intervention of the Gulf Cooperation Council (GCC) countries.

They rose against those who create the system that leads to food insecurity ...

While governments did not really understand the true reasons for the popular uprisings, their response shows they were mindful of the strong food dependency characteristic of the Arab world.

Except for a few countries, this dependency has continued to increase as a result of a growing population in a severely restricted natural context. The 2008 world food crisis sounded the alarm in a region that, until then, had been used to supplying itself via international markets. This crisis urged some countries, in particular the Gulf countries, to announce the launching of land acquisition programs to which corporate farming is supposed to add value. This new way of ensuring food security in these countries, which are rich in petroleum but poor in water and land, deserves a more specific analysis. This process could also be seen at work in Libya and, more recently, in Algeria, two countries also relatively rich in hydrocarbons.

The other Arab countries did not join this trend of looking abroad for agricultural land. In these countries, we are witnessing the development of corporate farming on their own land, particularly in Sudan and Egypt, if only because they welcome investors from the Gulf countries. More fundamentally, outside of the Gulf states, steps are being taken in Arab countries to liberalize the land sector and to facilitate the emergence of a (presumably) more productive one, namely an agriculture of investors that does not necessarily consist of large corporations. In this case, the objectives are not only food related. As we will see, these

are more broadly economic, sometimes even territorial as well as geopolitical.

This paper deals with these new dynamics, which are intended to overcome a somewhat difficult natural fate. After considering the main constraints characteristic of the Arab world and categorizing countries in relation to agriculture, we will focus on the food security strategies implemented by these countries and assess more specifically, and from a geopolitical perspective, the dynamics of a number of corporations.

“Green” States, “Yellow” States

Geographical determinism forms a concrete basis for agricultural and food security policies in the Arab world. Many images come to mind when reflecting on this part of the world, notably one of territories characterized by aridity. This image is obviously accurate since the region is covered by deserts: the Sahara to the west, the Rub al Khali and Nefud to the east, and the Libyan Desert straddling Egypt and Libya. Of course, streams and rivers flow through some of these deserts, and agricultural activity is therefore possible along the banks of these waterways (such as the Nile Valley and the Tigris and Euphrates valleys).

Yet in a space of some ten million square kilometers, two-thirds of these lands have no permanent water flows, which considerably reduces the areas favorable to granaries and gardens. Agriculture is found in the valleys of a few rivers that flow through the deserts or in the coastal plains with a Mediterranean climate. It is also found in natural oases or those artificially created by irrigation from underground water sources, as in Saudi Arabia. Agriculture is also practiced on terraces or valley floors in

the mountains when these are close to the sea (Mount Lebanon, the Asir Mountains in Saudi Arabia, the Jebel Ansariya in Syria, the Tellian range in Algeria, and the Rif in Morocco). Note also that 15 to 20% of the Arab region is above 1,000 meters in elevation (Carroué 1996, 7), and that some of these mountainous areas are located in deserts, which are useless for agriculture but sometimes used for grazing livestock.

It is always water that determines whether or not a particular area can be used for agriculture, be it plains, deserts, or mountains. The Arab world is well known for lacking water since it alone holds one half of the earth's "water poor." Another revealing fact is that 80% of the surface water is stored behind dams as opposed to an average of 20% for other regions of the world.²

This large-scale storage of water was developed to unprecedented levels beginning in the 1950s and 1960s, above all for irrigation. Irrigation water, or "blue water," also comes from fossil or renewable aquifers. This practice has profoundly changed an agriculture that before the growth of hydraulic technologies and the consequent recourse to fossil fuels was essentially based on rainfall (or "green water"). In fact, aside from oases or the immediate edges of streams and rivers, agriculture, which depended on highly irregular precipitation, generally occurred along the coasts. Without the supply of "blue water," some countries would be without agriculture since precipitation is too limited. With no (or very little) rainfed agriculture, the Gulf countries, Libya, and Egypt could develop their agriculture only by resorting to groundwater in the case of the first two and to water from the Nile for the third.

Not only does the Arab world have to deal with an arid environment that varies in severity depending on subregion and country, but it must also deal with a population explosion that intensifies the food problem. Every country in the region is undergoing a demographic transition, at very different rates. While this transition is almost complete in countries where educational development is the most advanced, particularly for girls,³ as in Lebanon and Tunisia, it is still in its infancy in the poorest countries, namely Mauritania, Sudan, and Yemen. Overall, the population is increasing, accompanied by the aforementioned food transition, in which a grain-based diet is giving way to one in which animal protein is more important. This has ramifications, as the inclusion of animal protein in the diet increases the need for plant calories (seven plant calories are required to produce one animal calorie).

To this should be added a highly dynamic tourist sector in some countries (Tunisia, Egypt, Morocco) and a strong migrant presence in others, particular in the Gulf countries, where oil resources attract a labor force in search of work from other Arab countries and especially and more recently from South Asia (Lavergne 2003). All of these factors increase food requirements and place an additional burden on already limited water resources.

A lack of land, a lack of water, and a growing population: this is the overall picture of the

2. According to hydrologist Malin Falkenmark of the Stockholm International Water Institute, the threshold of water poverty is 1,000 cubic meters per person per year.

3. As Courbage and Todd (2007) have demonstrated, the threshold of 50% literacy for girls is strongly correlated with the beginning of a decline in the fertility rate.

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Arab world. It is possible to frame this picture within a number of typologies, including the aforementioned “green-yellow” dichotomy, which in practice coincides with the distinction between republics and monarchies or even with the distinction between *thawra* (revolution) countries, in which the government is socialist and/or nationalist, and *tharwa* (wealth) countries, in particular the Gulf states (Camau 2006).

Yet these categories are debatable, and their superposition even more so.⁴ Although this is not our focus here, given our subject, we must evaluate the categories “green” and “yellow.” In this dichotomy, the populated, agricultural, and poor countries contrast with the desert countries, which are not highly populated and are rich in oil and/or gas. Recall that the aim of Nasser’s Arab nationalism was to combine the labor and products of some countries with the underground resources of others. Egypt, Syria, Morocco, and Sudan are striking examples of “green” countries, whereas the Gulf countries and Libya should be placed in the category of “yellow” countries.

Traversed by the Nile, Egypt has some 3.5 million irrigated hectares. Considering that irrigation makes possible double or even triple plantings, this increases the effective size of the arable land tenfold. Syria, where the Euphrates and Orontes flow, had 1.3 million irrigated hectares on the eve of the revolution, mainly from pumping groundwater. Morocco, where King Hassan II’s objective of a million irrigated hectares was reached in 1980, today has around 1.6 million. In Sudan, where the agricultural potential seems enormous, particularly because of the large land reserves of the Jazirah region, there are 1.8 million irrigated hectares. Obviously, it is not only a question

of irrigated agriculture because the countries in question, except for Egypt, are also characterized by considerable rainfed agriculture.

At the opposite pole are the Gulf countries, which are favored by tectonics. These semi-desert lands are in a subduction zone, where the Arabian Peninsula has been sinking toward the Iranian plate. Thick layers of living organisms came to be lodged in the resulting trench. Covered by alluvial deposits carried by streams, these biological formations sedimented at shallow depths at the optimal temperature. Thus, aside from being abundant, the resulting underground petroleum resources are the most accessible in the world and have brought in considerable revenues to their owners since their discovery. Today, the countries of the Gulf Cooperation Council (GCC) control 42% of known petroleum reserves and 23% of natural gas reserves. Petroleum accounts for 60% of exports in Bahrain, 95% in Kuwait, 90% in Saudi Arabia, 50% in Qatar, 77% in Oman, though only 25% (in combination with gas) in the United Arab Emirates, even though petroleum represents over 35% of GDP in that country.

The other energy Eldorados of the Arab world, particularly Libya and Algeria, are substantially less well-endowed. The former has 3% of world petroleum reserves and 1% of natural gas reserves, while the latter has 1% of petroleum reserves and 2.5% of gas reserves. It should be noted that although some “green” countries also have underground resources, their contribution to the economy is marginal.

4. Jordan and Morocco are not wealthy, while Libya and Iraq were for a long time wealthy “revolutionary” countries.

This is the case with petroleum in Egypt and Syria and phosphates in Morocco.

However, we should not exaggerate the distinction between the two types of country. Some countries with hydrocarbon wealth have not given up agriculture, including Saudi Arabia or even Libya, for example. Each has sought to ensure food security by resorting to agriculture of the “mining” type, which is based on capturing fossil water, though this sector remains secondary. Algeria is halfway between “green” and “yellow.” Its agriculture has experienced a number of difficulties, including de-ruralization (Bourdieu and Sayad 1964) and the failure of reforms (Bessaoud 2002), which have strengthened its reliance on resource rents.

Despite all the nuances that must be made in relation to this “green-yellow” dichotomy, we will use it as an analytical framework for understanding the dynamics of farming corporations. Note that some Arab countries will not be dealt with here, including Iraq, which is rebuilding and whose agricultural policy is difficult to grasp, and Mauritania and Yemen, at opposite ends of the Arab world, because they seem excluded from these corporate dynamics.

From Impossible Self-Sufficiency to the Acceptance of an Outward Orientation

Food self-sufficiency as a guarantee of food security was the choice of a number of agricultural countries in the Arab world after independence. This was perceived as the vehicle for internal stability and as the precondition for sovereignty, which was especially sought after in the region since the geopolitical context remained unsettled.

In addition, for the “green” countries, the 1960s and 1970s marked a significant phase in the development of their hydraulic infrastructure. In a region renowned for its ancient knowledge of water use, this effort was unprecedented, both in terms of the scale of the structures and the size of the land area involved. In this respect, the hydraulic activism of Egypt, Iraq, Syria, Morocco, and Tunisia deserves to be emphasized. Even Jordan, where water is quite scarce, developed a bold hydraulics project in the Jordan Valley.

Some countries (Iraq, Egypt, Syria) carried out agrarian reforms in conjunction with these hydraulic works “to give the land to those who farm it” (Mendras 1995, 199). In the Maghreb, it was less these reforms that were the priority than the re-appropriation of landed capital held by the former colonists. As for the peasants, they were often integrated into partially state-owned cooperatives, even into state farms, as in Syria or Algeria. This hold of the state also extended to markets, where most prices were controlled.

In the 1980s, the paradigm of food security changed with, on the one hand, increased population and food requirements and, on the other, the financial difficulties experienced by Arab countries, which led to structural adjustment plans and liberalization programs. Following the promotion of the doctrine of comparative advantage in trade, countries that had counted on self-sufficiency turned toward exports and signed free-trade agreements, including the Greater Arab Free Trade Area (GAFTA) as well as accords with the United States and the European Union. From then on, food security was no longer assured through self-sufficiency but rather through the purchase of less costly

foodstuffs on international markets, with the specialized agricultural sectors as a source of currency for these purchases. To strengthen the competitiveness of these sectors, investment in agriculture was promoted in Egypt, Morocco, Jordan, and Tunisia beginning in the 1990s and then in Syria beginning in the 2000s.

As regards hydraulics, the countries that had set up publicly owned facilities abandoned this approach and promoted private irrigation, particularly from groundwater sources. In terms of land, Egypt and Syria, which had implemented agrarian reforms, carried out counter-reforms with the objective of – or at least the effect was a degree of – re-concentration of the land (Ayeb 2008). First, Egypt enacted a law in 1996 lifting restrictions on land rents, which led to peasant riots. Then, beginning in the 2000s, Bashar al-Assad's Syria called into question the limits on land ownership. Even Jordan privatized land in the strategic region of the River Jordan in 2001.⁵

Following the period of state supervision, the promotion of investment in agriculture based on the market called in practice for going beyond simple family agriculture and, even more so, subsistence agriculture. Hence in Morocco,⁶ Tunisia, Syria, and Egypt, investors were gradually introduced into incorporated family farms or in the corporate farming sector (Hervieu and Purseigle 2011). In the latter case, this may involve merchants, manufacturers, or others who operate outside of any family model and invest part of their assets in agriculture, while it may also involve large, often foreign corporations, though this is less frequently the case. Egypt, in particular, welcomed this type of farming on new and improved land in the Nile Delta, on land in north Sinai irrigated by the Al-Salam canal, and on land in the

Toshka region, irrigated with water from the Aswan Dam. In each case, the objective was to ease congestion in the Nile Valley, which has one of the highest population densities in the world. This objective remains relevant. Some farming corporations are quoted on the Cairo stock exchange, though with varying success. For example, the Kingdom Agricultural Development Corporation (KADCO), founded by the Lebanese-Saudi Prince Al-Waleed bin Talal, has been experiencing difficulties for two years.

Even in the Palestinian Territories, and especially on the West Bank, we can see the emergence of corporate farming.⁷ Corporations such as Padico (date production) and Sinokrot⁸ (truck farming and medicinal herbs) have been set up in the Jordan Valley on land not under the control of Israeli settlers. In the context of this occupation, the difficulties encountered by the small farmers of the Jordan River Valley in selling their produce on local markets already saturated with Israeli produce have pushed some to dispose of their land either by giving up rented land or by selling it if they were

5. Jouve (2006) describes rather well the transition from "God's water" (rainfed agriculture) to private water (following the period of state water).

6. In Morocco, the initial component, and the largest in financial terms, of the "Green Plan" put in place in 2008 uses the concept of "aggregators," whereby modern agricultural organizations with highly developed management capacities aggregate around them dozens of small farmers (Akesbi 2012).

7. Authors' observations, March 2013.

8. Long active above all in Jordan, this holding company is today headed by Mazen Sinokrot, Minister of the Economy for the Palestinian Authority during the 2000s.

the owners. Agricultural corporations then replace them. Using their abundant capital, these develop packaging plants and are thus in a position to export. Obviously, this is a unique situation given the geopolitical conditions prevailing in the Palestinian Territories. However, this type of investment agriculture has also developed in Lebanon to the north of the Bekaa Valley, specifically in the Qaa zone, which adjoins Syria. In a region where the state is largely absent, investors, above all merchants, hold control over the land, which is improved by irrigation from large wells that require relatively large infusions of capital.

The reality in the other “yellow” countries seems at first glance quite different since the limited amount of arable land prevents any agriculture. Some countries such as the United Arab Emirates, Qatar, and Kuwait favor the purchase of agricultural products on foreign markets, with local agriculture focused essentially on date production, which has low water requirements. By contrast, Saudi Arabia, with a much larger land area than its small neighbors, has long favored supplying itself. In that country, with little surface water but substantial groundwater and energy deposits, an agriculture focused on the production of basic foodstuffs was developed during the 1980s. This can be called a “mining” agriculture since it is made possible by pumping deep fossil groundwater from Nubian sandstone. Aerial views of these large irrigated areas are impressive, the irrigation pivots tracing large circles in the Arabian Desert.⁹ Guaranteed high prices and the use of inexpensive energy made Saudi Arabia a regional agricultural power to the extent that it even exported grain, particularly to neighboring Jordan. With 1.8 million irrigated hectares and fewer than 30 million

people, this is hardly surprising. Obviously, given the remote living conditions and the large amount of capital required, this model of remote agriculture has drastically changed from traditional family agriculture to corporate farming, employing a sizable labor force.

While the indigenous model of agriculture prevailed for a time, it is no longer truly relevant. Just as in the “green” countries, the approach changed, though for different reasons. The risk of exhausting water resources and the 2008 food crisis pushed Saudi Arabia, the largest country in the Gulf region, to radically question its approach to meeting its food security needs, while the other Gulf countries were also forced to look to foreign lands. The new strategy stimulated the development of corporate farming and increased its visibility. Elsewhere in the Arab world, this strategy remains more in the background, except for Libya, at least up to the recent revolution. This can be explained by the different financial capacities of the “green” and “yellow” countries.

The 2008 Shock and the Paradigm Shift in the “Yellow” Countries

From the beginning of 2006, tensions appeared in the international agricultural markets. Following these anxieties, panic erupted in 2007-2008 when the large grain-producing

9. The largest irrigated areas in the kingdom are concentrated in the regions of Al-Jawf, Hail, Al-Qassim, and Riyadh. In 2008, 82% of all grains were produced there. See Kingdom of Saudi Arabia, Ministry of the Economy and Planning, “The Ninth Development Plan, 2010-2014,” 545-60.

countries announced lower harvests as a result of drought, floods, and insect infestations. In addition to this already worrying picture, grain reserves were at their lowest level in two decades. Faced with the risk of shortages and inflation, several Asian and African countries¹⁰ undertook to protect their domestic market. Vietnam, the world's second-largest rice exporter, prohibited rice exports in spring 2008, while other grain-producing countries such as Russia, Ukraine, and Kazakhstan also restricted their exports.

The emergency measures taken by the large agricultural countries of Asia and Europe threatened the availability of imports. The Gulf countries realized that their dependence on international markets, which was due to continue increasing, presented excessively high risks. At the same time, as prices increased and the dollar fell, the Gulf's bill for agricultural and food imports became dangerously high, climbing from €6 to €20 billion between 2003 and 2008 and probably reaching €22 billion by 2020.¹¹ These imported commodities caused inflation, which the revenues derived from the exploitation of hydrocarbons could not contain over the long term. Ultimately, like all other Arab states of the region, the Gulf countries will be confronted with significant population growth, with a projected increase of over 60% by 2050 for the countries of the Arabian Peninsula (except for Yemen).

While there was a crisis of confidence in food exporters after 2008, a deeper crisis pushed the Gulf countries, particularly Saudi Arabia, to abandon the objective of food self-sufficiency. This was the water crisis. Water had been exploited to excess to produce wheat, barley, and meat. The combination of the petroleum rent and fossil aquifers could

make the desert bloom only up to the point where one or the other was exhausted (Elhadj 2005). Ultimately, the imminent water shortage,¹² the damage caused to fossil aquifers, and the financial bottomless pit involved in this production model led the Saudi kingdom in 2008 to plan for the total cessation of its local wheat production by 2016.

Profoundly affected by the deficiencies of international markets and unable to produce sufficient quantities of food for a population whose needs were bound to increase, the Gulf countries thus undertook to secure their food supply by making agricultural investments in foreign countries. The idea was to achieve a relocated form of self-sufficiency by purchasing land and farms in countries better endowed with land and water by using petroleum and/or gas revenues.

Thus, the Kingdom of Saudi Arabia strongly encouraged – or even forced – corporations that had formerly produced grain in the kingdom to move to other countries, an intention expressed in the “King Abdullah Initiative for Saudi Agricultural Investment Abroad.” By affixing his name to such a project, King Abdullah bin Abdul Aziz al-Saud forcefully asserted the priority given to these investments in the political, economic, and social agenda of the country. Government

10. These include Burkina Faso, Niger, Mali, and Nigeria.

11. Economist Intelligence Unit, *The GCC in 2020: Resources for the Future* (London: Economist Intelligence Unit, 2010), 16-22.

12. See Kingdom of Saudi Arabia, Ministry of the Economy and Planning, “The Ninth Development Plan, 2010-2014,” 545-60.

support for national entrepreneurs was not therefore only rhetorical since it was expressed both through measures facilitating the establishment of Saudi corporations abroad as well as through direct financial support. A fund of nearly €700 million was set up to award credit to farming corporations and to permit logistical and infrastructure investment.¹³

The Hail Agricultural Development Corporation (HADCO) undertook the first Saudi project in Africa. Having discontinued its local wheat production, it signed a lease allowing it to farm several thousand hectares of land in Sudan.¹⁴ Another result of the king's initiative is Jannat, a consortium of companies previously specialized in the national production of grains. In addition to the Al Rajhi group, this consortium includes three other Saudi companies: the Tabuk Agricultural Development Company (TADCO), Almarai, and Al-Jouf. This consortium invested in Egypt, Sudan, and Ethiopia, and anticipated extending its area of operations beginning in 2009 to Europe and even Asia, specifically in the Philippines and Indonesia.

The United Arab Emirates, one of the largest producers and exporters of petroleum, also began a move to relocate its agriculture by undertaking a diplomatic dialogue with major agricultural countries in Asia and Africa. The search for land abroad on which to grow grain, fruit, and forage went through public investment funds or private corporations. For example, Al Dahra Agriculture, based in Abu Dhabi, moved its operations abroad in 2007 to protect the Emirates from rising food price inflation. Initially, the leases negotiated with Egypt, Pakistan, Spain, and the United States allowed the Emirates to produce up to 50% of its fodder needs. The group then entered the

olive-growing sector in Morocco, which was becoming increasingly open to foreign capital, and even in Namibia, exporting or re-exporting part of its production to Gulf neighbors as well as to emerging markets such as China. Clearly, Al Dahra's strategy is particularly effective. This corporation completely controls the supply chain and employs only slightly over 800 people around the world by using labor-saving technologies. At the same time, Al Dahra entered the rice growing sector in Pakistan in 2007 for both Emirati consumption and export. The corporation also established precise guidelines for rice processing, from planting to packaging.

Qatar's great petroleum and gas wealth give it a range of investment opportunities in various sectors throughout the world (media, real estate, luxury, automobile, sports). Yet the agricultural sector was not overlooked by the Emirates since it is viewed as strategic at both the national and the international level. Like its neighbors in the Arabian Peninsula, its territory – in which arable land makes up only 1% of the total surface area – and its water resources do not allow it to feed a population

13. In January 2008, the kingdom decided to reduce its wheat production by 12.5% per year. Furthermore, the volume of production had noticeably declined since the middle of the 1990s, from 4.5 million tons in 1993 to 2.3 million tons in 2008, which amounted to losses for companies that had invested considerable amounts in the production of wheat and other grains.

14. In February 2009, this company was farming over 9,000 hectares and projected expanding this area to over 40,000 hectares though without specifying any deadline. See Gilles Paris, "L'Arabie saoudite vise un autosuffisance alimentaire délocalisée," *Le Monde*, April 18, 2009.

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of 1.6 million people (barely 20% of whom have Qatari citizenship).

Conscious of the risks presented by volatile prices on international markets, Qatar adopted in 2008 a two-tier strategy for agricultural investments in research, both abroad and domestically, with the aim of reaching a degree of food self-sufficiency. Following the example of neighboring countries, the Emirates' sovereign fund, the Qatar Investment Authority (QIA), created its own company, Hassad Food, which, with a capital of over €600 million, leased or purchased several thousand hectares of land throughout the world in Sudan, Turkey, Ukraine, Brazil, and Australia. Hassad Food, which serves the interests of the Emirate and as a result has significant support from the Qatari sovereign fund, relies abroad on existing farming corporations. In September 2009, its president, Nasser Mohamed Al-Hajri, stated that the company had begun negotiations to obtain shares in ten South American companies. Like Al Dahra in the United Arab Emirates, Qatar and Hassad Food anticipate gradually controlling the entire supply chain by focusing first on strategic products such as wheat, rice, and soy, and then on fruit and vegetables before concentrating more specifically on the processing and packaging of products.

The Emirates' strategy of productive investments abroad is coupled with a national component. The Qatar National Food Security Program (QNFSF) announced in 2008 by Sheikh Hamad bin Khalifa al-Thani aims at ensuring a minimum level of national production by managing water resources and through massive investments in solar energy and agromonic technologies. After all, the country has 70,000 hectares of arable land, of which only

20% is actually farmed. Although farming this land remains difficult because of the aridity, hydroponic cultivation has been put forward as a means of increasing production to the point where Qatar anticipates covering 70% of its needs internally by 2023.

Food strategies increasingly based on moving operations abroad are not limited to the Gulf countries. Other Arab states, also wealthy thanks to petroleum and gas revenues, have resorted to similar strategies. This is true of Libya, which undertook many pharaonic irrigation projects despite their environmental and geo-strategic consequences. Having exhausted all of its fresh water resources and over-exploited its coastal aquifers, Libya began exploiting its fossil resources in the southern part of the country in the 1980s. Because of its particular geopolitical situation, which resulted in an embargo until 2003, it attempted to reduce its food dependency by developing agriculture in the desert. However, having met with a technical setback, Tripoli decided to bring water to the north, particularly to the Sirte, Benghazi, and Jeffara regions, where the former colonial farms are located. In 1991, Colonel Gaddafi initiated the Nahr el-Azim ("Great Man-Made River"), a buried channel linking the Nubian aquifer in the east to the Cyrenaic coast. Libya thus built a 1,900-kilometer-long pipeline to bring fresh water from aquifers in the southeast. More recently, in 1996, a second canal linked Tripoli to the Fezzan aquifer in the west. Ultimately, some 250,000 hectares should be irrigated in the Benghazi, Sirte, and Jeffara regions, even if the irrigated land was far from being fully operational at the time of the 2008 food crisis. Moreover, these projects

were clearly not without environmental consequences since water was being pumped out of fossil aquifers with an estimated availability of half a century, or a century at best. Moreover, since these aquifers are international, there was a strong geopolitical dimension to these projects.¹⁵

The necessity of securing its food supplies thus led Libya, whose investments in Africa were already sizable, to mobilize capital toward the agricultural sector in sub-Saharan African countries rich in land and water. This was the purpose of an agreement concluded in 2008 between the Republic of Mali and the Great Socialist People's Libyan Arab *Jamahiriya*, whereby Mali agreed to lease 100,000 hectares to the Libyan company Malibya, a subsidiary of the Libya African Investment Portfolio (LAP), to produce tomatoes and grow hybrid rice. The contract specifies that Mali is committed to offering the land "free from any juridical constraints" on a fifty-year renewable lease, with no limit on water use being stipulated (Oakland Institute 2011, 26-8). While the project was originally supposed to ensure self-sufficiency for Mali and Libya, nothing was stipulated concerning the distribution of production (Brondeau 2010).

Signed at the urging of Gaddafi, the contract was blocked when the Libyan leader fell from power in October 2011. Malian peasants have now initiated legal proceedings to recover their land. Yet this legal action is taking place at a time when Mali, confronted with a rebellion and severe political instability, is of less and less interest to investors.

Despite all of these factors, Libya's move abroad to ensure food supplies seems to be ongoing. During his meeting with President Omar Al-Bashir in January 2012, the president

of the National Transition Council, Mustafa Abdul Jalil, announced that like the Gulf petroleum states, Libya wants to take advantage of the land resources and agricultural potential of Sudan.¹⁶

Algeria, which imports nearly two-thirds of its grain needs, has deployed a two-part strategy consisting of looking abroad and welcoming investments. Unlike the Gulf countries, Algeria is rich in arable land, though productivity levels are low. In addition, to raise capitalization in agriculture, the government decided in July 2010 to relax its legislation on foreign investments in Algerian land in order to allow private corporations to lease farms previously managed by the state.¹⁷ Given that Algeria long remained closed to foreign investment, due in part to its colonial history, it took nearly a year and a half for this law to have any practical effect.¹⁸ The directives of the Algerian Ministry of Agriculture stipulate that the land and buildings of pilot farms will remain state property and will be available to private, national, or foreign companies by

15. The aquifer, located in Nubian sandstone, straddles the Libyan, Egyptian, Chadian, and Sudanese borders, and is one of the largest freshwater reserves in the world. Egypt has long been concerned about increased pumping because it fears a crowding-out effect whereby the underground water in its territory would decrease.

16. Reuters, "Libya NTC Says to Review Investments Worldwide," January 8, 2012.

17. In Algeria, pilot farms were created in 1982. These provided the state with land assets for the production of seeds and plants and for the introduction and spread of modern technology.

18. Reuters, "L'Algérie tente d'attirer les investisseurs en terres agricoles," September 21, 2011.

concession.¹⁹ In April 2012, the United Arab Emirates began negotiations with the Algerian government concerning the creation of two pilot farms for milk production. However, the Gulf states generally remain tentative about agricultural investments in Algeria. This caution is linked to the fact that the Ministry of Agriculture anticipates that “production from pilot farms will have to prioritize covering the needs of the national market.”

However, apart from this new domestic initiative, Algeria is about to follow the Gulf countries and embark on relocating its production but without making it a real national strategy. Thus, in June 2012, the Algerian corporation Cevital, a national leader in the agro-food industry, began international operations in West Africa.²⁰ The company anticipates investing nearly €800 million over five years and is currently negotiating a concession of 300,000 hectares in Côte d’Ivoire to grow rice, sugar, and ultimately cacao. A major operator in refining oil and sugar, the company has an ambiguous relationship with the government since the latter has attempted to limit its dominant position in the market. Moreover, eight years ago, the president of the group refused to support the presidential candidacy of Abdelaziz Bouteflika. More recently, the company’s policy on food prices was strongly criticized by the government, which accused Cevital of being partly responsible for riots and popular demonstrations at the beginning of 2011. A report by the commission of inquiry initiated by the National People’s Assembly concerning price increases and made public in December 2011 officially called into question the role played by Cevital.²¹

While it is the energy rich countries that have initiated the process of setting up farming

corporations abroad, some less-well-off countries have also adopted this strategy, albeit more marginally. For example, before the 2008 crisis, Jordan set up a company in Sudan to begin production for the Royal Hashemite Army. Meanwhile, Egypt, which is heavily dependent on grain, was pursuing investments in Sudan on the eve of the 2010 revolution.²²

What Territorial Strategies?

Since they are guided by production choices, it is not surprising that agricultural investments are found in diverse geographical areas, sometimes quite distant from Arab countries. Yet the selection of target countries seems underpinned by geopolitical motives, as reflected in the Land Matrix database, with Gulf states investors “[tending] to target locations with some cultural and religious affinity, such as Northern Africa and the Horn of Africa, as well as Asian countries with Muslim populations (Pakistan, the Philippines, and Indonesia)” (Anseeuw et al. 2012, 22).

Other countries could be added to the list, including Kazakhstan, Turkey, and Mali. This Islamic orientation is hardly surprising coming from countries – in particular Saudi Arabia and

19. Republic of Algeria, Ministry of Agriculture and Rural Development, “Conditions et modalités de la mise en œuvre de partenariats en vue de la gestion et de l’exploitation des fermes pilotes érigées en entreprises publiques économiques (SPA),” March 14, 2011.

20. Baudelaire Mieu, “Cevital of Algeria Seeks Ivory Coast Land for Rice, Sugar,” June 6, 2012.

21. Nabila Amir, “Un coup de diversion du pouvoir,” *El Watan*, December 19, 2011.

22. IRIN, October 13, 2010.

Qatar – that do not hesitate to base a large part of their diplomatic legitimacy on their preeminence within Islam (Blanc 2010).

The religious – even pan-Islamic – variable is also illustrated by a project launched by the Organization of Islamic Cooperation, which through its financial arm, the Foras International Investment Company, claims to be “the collective voice of the Muslim world.” In August 2008, with great media hype, Foras announced the production of seven million tons of rice on 700,000 hectares of irrigated land. Known under the name of “7 × 7,” this project seemed initially not to have gone beyond the announcement stage. However, recent information indicates that the company, which is headquartered in Jeddah, is making progress towards its objective. The third Islamic Business and Finance summit held in 2011 in Kazan (Republic of Tatarstan) pointed to the importance for the Gulf countries of links to the Republics of the Russian Federation, whose Muslim identity and wealth in arable land are essential assets for the petro-monarchies.²³

Beyond this symbolic dimension, proximity also plays a role in view of the recurrence of contracts in the Nile region, which is rich in both water and land. The investment pressure in this area seems so strong that the FAO recently became alarmed. Combining the advantages of proximity and belonging to a shared cultural area, Sudan appears as an Eldorado, at least in the announcements of transactions, which present the country as a granary for the Arab world. Already while under British rule, the Crown made Jazirah, located to the south of Khartoum, into a large irrigated area of over 100,000 hectares. Much later, during a 1974 FAO conference in Rome,

Sudan was showcased as one of the three granaries of the world. Simultaneously, the petroleum-producing Arab countries became aware of their food insecurity in a context of tensions with the West. There was even talk at the time of a huge Arab investment program in the country through the Arab Fund for Economic and Social Development (AFESD) created by the Arab League.

Following the two petroleum shocks, surplus petro-dollars should have allowed agricultural growth in Sudan for the benefit of the Gulf in particular. Yet the political vicissitudes of the country wrecked these hopes for a while. The return of the Arab countries to Sudan dates from the end of the 2000s. This new presence has occurred in particular in the desert lands of the north, far from the traditional agricultural areas already largely developed and settled, such as Jazirah. The construction of the large dam at Merowe on the Nile has also facilitated bringing this northern area under cultivation (Taleb 2009).

The choice of this more sparsely inhabited area was also dictated by the need to limit risks since the presence of foreign companies is not neutral, as the Gambela episode in Ethiopia showed. In this region, located in the extreme west of Ethiopia, the land was specifically made available (Lavers 2011) to welcome investment projects. However, the Saudi company Saudi Star, established in Gambela as part of King Abdullah’s initiative to cultivate rice for consumers in the Kingdom (Gascon 2012), had to deal with a peasant revolt in April

23. In the course of the summit, Foras announced its intention to acquire 10,000 hectares of land in the Republic of Tatarstan for agricultural projects.

2010, with the indigenous population²⁴ going so far as to kill employees of the farm held by the businessman Mohammed al-Amoudi. Likewise, following violent protests, the Bin Laden group was forced to suspend its rice production project in Indonesia. Nor are these episodes exceptional. No matter what the geographical area or the time period, nothing to do with the land is neutral, because there are few spaces left without a human footprint.²⁵

Another risk for investors is to see the agreement denounced because of political change. This is what happened to KADCO in Egypt following the exit of Hosni Mubarak on February 11, 2011. Controlled by the Lebanese-Saudi Prince Al-Waleed bin Talal, this company was established in Egypt well before the increase in agricultural investments in 2008. Ten years earlier, it had leased 100,000 *feddan* (42,000 hectares) as part of a large project aiming to alleviate congestion in the Nile Valley through the construction of a new valley in the desert by means of a canal from Lake Aswan, where water is plentiful. Although a pumping station named “Hosni Mubarak” opened in 2003, the development of the land in the Toshka region was delayed. Despite the presence of large irrigation pivots, at the turn of 2010, only 1,000 *feddan* had been cultivated by the Saudi company to provide off-season produce to Europe. Shortly after the revolution, the new authorities denounced the conditions under which the land had been allocated ten years earlier, and in June 2011, the Egyptian government forced the Saudi company to cede back 75,000 *feddan*.²⁶

The same misadventure happened to the Al Dahra corporation of Abu Dhabi, whose transactions with the Egyptian government were declared illegal in February 2011. These transactions also involved the Toshka region.

Although the area conceded was identical to that conceded to KADCO (100,000 *feddan*), the agreement had been concluded later than that with the Saudi company (2008).

The risk factor is thus determinant in the choice of target countries, which can explain why more distant countries that appear to be more secure are favored.²⁷ Beyond security uncertainties, the strategy of relocating agriculture abroad is a source of debate in the investing countries. In Saudi Arabia, for example, some leaders have denigrated this strategy outright. Fawaz al-Alamy, the negotiator for

24. The Anuak ethnic group, who live close to the Alwero River, are herders, fishers, and farmers. When the flow of the Alwero increases, they move away from its banks, to which they return to practice flood recession agriculture once the river returns to its bed. However, it seems that the Saudi Star Corporation had modified the flow of this river, hence the anger of the residents.

25. Instability and risks in the Nile Basin have encouraged the assistant secretary general of the Arab League in charge of economic affairs, Mohammed al-Tuwaijri, to announce that investments should from now on be made elsewhere than in this region, particularly in the Islamic republics of central Asia. This was the context of the second forum of agri-food corporations organized in Dubai in May 2012. See Caline Malek, “Arab States Must Invest in Central Asian Farmland,” *The National*, May 8, 2012.

26. In the *Daily News Egypt* of June 8, 2011, the executive director of KADCO, Ahmed Halwani, reconsidered the cost of developing this land, which reached 50,000 Egyptian pounds (or around €5,630) per *feddan*, a price that appeared to him to be quite high, and in any case too high for a corporation whose parent company, the Saudi Prince al-Waleed’s Kingdom Holding Company, had suffered a great deal from the 2008 financial crisis.

27. Georgetown University Qatar conducted a study on the possibility of setting up GCC companies in Cambodia. See Shepherd (2012).

the admission of the Saudi Kingdom to the WTO, was particularly skeptical:

I would love to see these projects succeed, but I don't believe it. Profit margins are already small in the food business. I'd rather have agreements with credible countries like New Zealand and Canada – they produce without help from us ...²⁸

In addition, this Saudi leader pointed to the absence of risk in these countries.

For his part, Turki Faisal al-Rasheed, president of the food conglomerate Golden Grass, denounced the risks that could result from giving up agriculture in the country. In a strongly capitalist petroleum economy, jobs must be maintained or created in sectors other than the extraction of underground wealth, and agriculture is a natural outlet and a factor for national stability.²⁹ As a result, other solutions have been recommended or even implemented. For example, the United Arab Emirates have created a trading company that is supposed to compete with the grain giants Cargill, Dreyfus, and Bunge, with storage infrastructure planned to be developed by the GCC, notably at the regional level.³⁰

Conclusion

Since the 1980s, most Arab countries have seen changes in their agricultural strategy. The corporation has gradually become established as a major force in different sectors, from entrepreneur-investors in agriculture to highly capitalist companies. In the “green” countries, where arable land is already in heavy use, entrepreneur-investors seem to prevail over large corporations, which use up much more land. Consequently, such corporations can only be set up in virgin areas, such as new

land in Egypt, whereas in the “yellow” countries, the large corporations use their financial capacity either to farm locally in an arid environment or, increasingly, to move abroad, even to distant countries.

The two types of corporation prevalent in one or the other of these country categories (“green” and “yellow”) have different objectives. While entrepreneur-investors have blossomed in “green” countries due to a drive toward liberalization that emphasizes comparative advantage, the main concern of large corporations in the Gulf has been food security.

As this paper emphasizes, the capitalist corporation strategy is largely managed by the state, given the two imperatives of food supply security and water conservation. In this regard, it is clear that “land grabbing” by countries in the region occurs above all because of insufficient water since among the countries involved in international land transactions, the United Arab Emirates, Saudi Arabia, and Qatar have the highest indices of water scarcity in the world (respectively 20.32, 9.45, and 4.55) (Anseeuw et al. 2012, 33).

Complementarity between the “green” and the “yellow” countries is no longer valid, if indeed it ever was. Corporations from the Arabian Peninsula or Libya, where land – and, above all, water – are scarce, will find it difficult to locate ideal land in other parts of the Arab world, where the population explosion,

28. Thomas W. Lippman, “Saudi Arabia’s Quest for Food Security,” *Middle East Policy* vol. 17, no. 1 (2010): 90-98.

29. Lippman, “Saudi Arabia’s Quest.”

30. Nadim Kawach, “GCC States Look Abroad to Meet Food Needs,” *Emirates Business*, March 3, 2010.

which also affects rural areas, lowers the possibility of finding such land. Only Sudan offers real opportunities, but its political instability remains a constraint. This example shows how the strategy of food security by relocating abroad is problematic to the extent that some decision makers are now even questioning its relevance. It will be interesting to follow closely the development of these large corporations in a context in which agricultural prices seem destined to remain high.

In the “green” countries, where investors in agriculture have been favored by recent measures (such as land reforms and internal and external liberalization) and by the links they are able to maintain with government representatives (Arrighi de Casanova and Courcier 2002; Abdelhakim 2009; Blanc 2012), it will also be interesting to see if the political transition now underway will strengthen the move from subsistence to managerial forms of agriculture.

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Abstract

Pierre Blanc and Matthieu Brun, *A Geopolitical Perspective on Agribusiness in the Arab World*

In addition to the recent political unrest, the Arab world continues to be affected by the constraints of an arid environment that, combined with the effects of a rapid demographic transition, have had a dramatic impact on many countries throughout the region. The apparent homogeneity of the region masks significant differences in terms of agricultural policy. In particular, there is a clear distinction between countries with a rentier economy based on the development and exploitation of hydrocarbon resources ("yellow" countries) and countries with a predominantly agricultural economy ("green" countries). With the exception of Saudi Arabia, this distinction suggests different options in terms of food security. Initially, "green" countries tried to reduce their dependence on imports by developing domestic production. By contrast, "yellow" countries tended to focus on access to international markets. Over time, "green" countries began to promote an agricultural system that encourages

Résumé

Pierre Blanc et Matthieu Brun, *Un regard géopolitique sur l'agriculture de firme dans le monde arabe*

En proie à des bouleversements politiques majeurs, le monde arabe demeure soumis à la dictature d'un milieu aride, qui se double d'une transition démographique particulièrement intense. Cette relative homogénéité masque des différences dans le choix des politiques agricoles, les pays à économie de rente fondée sur l'exploitation des hydrocarbures (« pays jaunes ») se distinguant nettement des pays tournés vers la production agricole (« pays verts »). Quoique contredite par l'Arabie saoudite, cette dichotomie éclaire assez bien les différences d'option en matière de sécurisation alimentaire : les pays verts ont cherché à réduire leur dépendance par la production intérieure quand les pays jaunes privilégiaient l'accès aux marchés internationaux. Cependant, avec le temps, les premiers promouvaient une agriculture d'investisseurs plus enclins à exporter qu'à résoudre l'équation alimentaire nationale tandis que les seconds se projetaient dans le monde via des investissements de firme, dans des aires

investors to export their production rather than contribute to national food security, while “yellow” countries entered the global market through investments in regions selected on the basis of cultural and geographic criteria. In short, whereas “green” countries have become passive recipients of corporate farming, “yellow” countries have become actively involved in promoting the development of agricultural corporations. In both cases, this has major social and geopolitical implications.

Keywords

Arab countries, aridity, “green countries”, “yellow countries”, food security, agribusiness

choisies selon des critères culturels et géographiques. Aussi, si les pays verts sont les récepteurs d’une agriculture de firme, les pays jaunes en sont plutôt les émetteurs : dans les deux cas, les conséquences sociales et géopolitiques ne sont pas neutres.

Mots clés

pays arabes, aridité, « États verts », « États jaunes », sécurité alimentaire, agrofirmes