Food security is a major challenge facing countries in the MENA region. MENA is the largest wheat-importing region in the world.

Most MENA countries face production constraints due to lack of water and arable land.

The 2007-08 food crisis and ongoing civil unrest have created value chain disruptions and higher food prices in MENA countries.

High food prices have a feedback effect on political unrest.

MENA countries are investing in new food security strategies to reduce threats to stability.

**MENA Country Typology and Levels of Food Insecurity**

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<td>Comoros</td>
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<td>Djibouti</td>
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<td>Mauritania</td>
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<td>Somalia</td>
<td>Syria</td>
<td>Oman</td>
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<td>West Bank and Gaza</td>
<td>Iraq</td>
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<td>Egypt</td>
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<td>Lebanon</td>
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<td>Tunisia</td>
<td>Israel*</td>
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Food security is measured as total exports divided by food imports and food production per capita. Low Risk is defined as one or both measures below the global average. Moderate risk is defined as one or both measures less than 50% of the global average. High risk is defined as one or both measures less than 30% of the global average.

Source: CGGC based on data from World Bank Development Indicators and Breisinger et al, 2010

**Methodology**

- Value chain mapping of the global wheat industry
- Identification of major global-level actors and institutions
- Evaluation of domestic wheat flows in five selected country cases, including links to broader GVCs
- Identification of relevant actors, policies and institutions for each case
- Analysis based on comparison of wheat GVCs between different countries and within individual countries over time

**Other Current Work**

- Creation of a GVC framework for the global wheat industry
- Role analysis of major multinational firms in the wheat GVC
- Trade analysis of wheat and other key commodities in MENA
- Country-level wheat GVC case studies for Egypt, Syria, Iran, Saudi Arabia and United Arab Emirates
- Comparative analysis of food security strategies in selected countries, with a focus on trade, offshoring and self-sufficiency schemes

**Future Work**

- Conduct additional structured and semi-structured interviews with key private- and public-sector actors
- Extend GVC analysis into other key commodities, such as rice, corn, and/or vegetable oil
- Merge findings from GVC analysis with quantitative models of inter-country trade networks and intra-country supply chain infrastructure
- Broaden assessment of food security strategies in MENA based on the macro and micro levels of analysis of several commodities

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