



## Who Feeds the World's Wealthiest Nations:

Food import dependency among capital-rich economies — and the nations positioned to supply them.

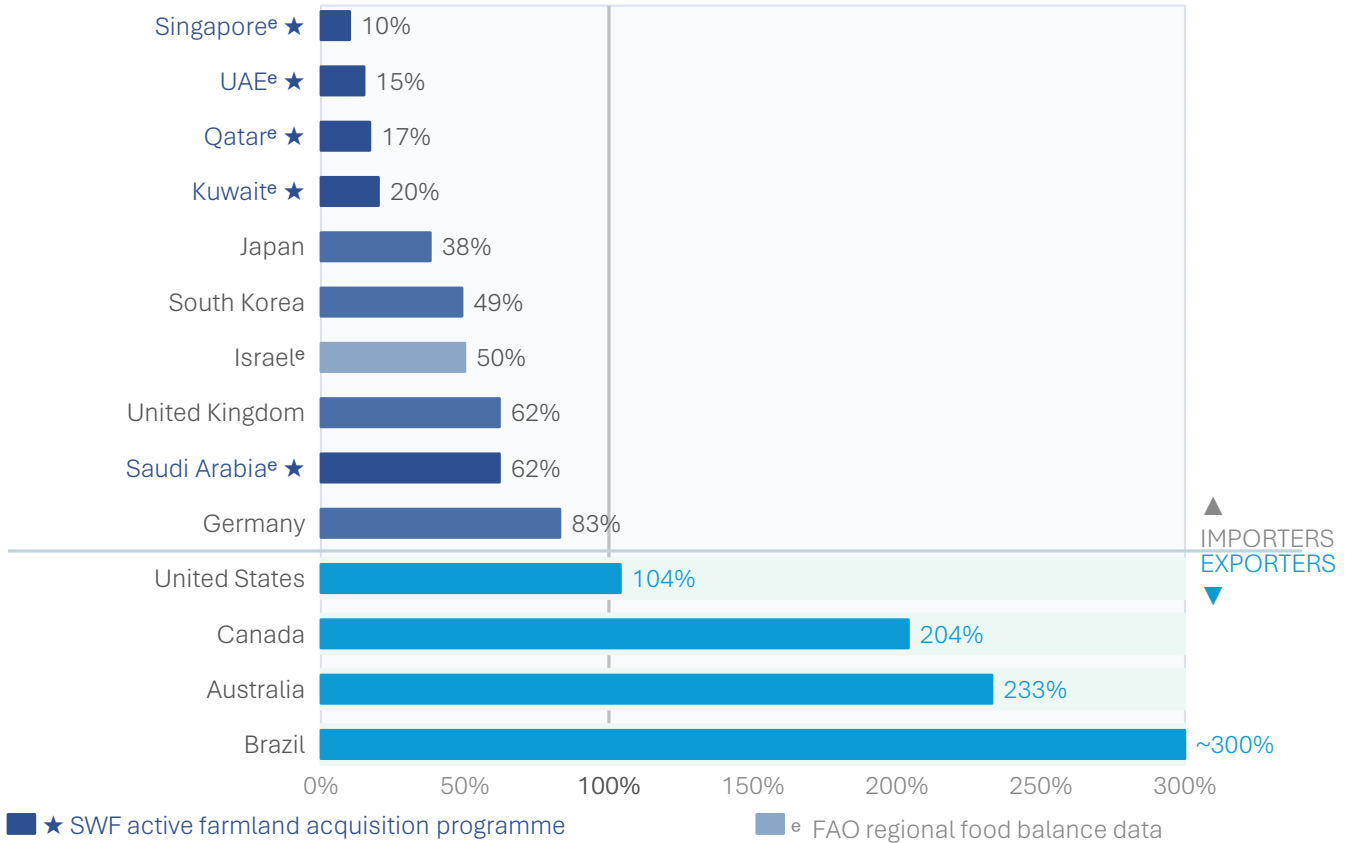
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# Who Feeds the World's Wealthiest Nations?

Food import dependency among capital-rich economies — and the nations supplying them.

The world's wealthiest nations — those managing the largest sovereign wealth funds and deepest capital markets — are structurally unable to feed themselves. Geography and population density have created a permanent food import dependency that cannot be engineered away. The only durable response is securing productive farmland abroad. This is already underway at scale.

## FOOD SELF-SUFFICIENCY RATE | CALORIE BASIS



## WHAT THE DATA IS TELLING US

**~\$4T**

SWF capital in food insecure nations

ADIA, QIA, KIA, GIC, and Temasek collectively manage ~\$4 trillion. Farmland and agri-infrastructure are stated priorities.

**49%**

South Korea calorie self-sufficiency (2023)

South Korea's self-sufficiency is 49% — well below its target of 56% by 2029. Korean trading houses are active sovereign farmland acquirers.

**233%**

Australia food self-sufficiency

Canada, Australia, and Brazil are land-rich, capital-seeking, and positioned to supply sovereign demand that land-poor nations cannot meet domestically.

The breadbasket exporting nations — Canada, Australia, and Brazil — hold the world's surplus productive land. The capital-rich food-insecure nations hold the money. Farmland at the intersection of this structural mismatch.

Sources: Food self-sufficiency rates from Japan's Ministry of Agriculture, Forestry and Fisheries (MAFF) FY2023; Savills Global Food Self-Sufficiency Tracker; FAO Food Balance Sheets (FAOSTAT). Gulf state estimates derived from FAO Near East and North Africa (NENA) regional data and Alpen Capital GCC Food Industry Report. South Korea estimate from FAO/JIRCAS calorie basis analysis. Sovereign wealth fund AUM from Sovereign Wealth Fund Institute (SWFI). <sup>e</sup> denotes estimated values.



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