



LAND MATRIX
www.landmatrix.org

Large-scale land acquisitions

Trends and developments according to Land Matrix data

Wytske Chamberlain, Kerstin Nolte and Markus Giger

What is the LMI?

- A global partnership
- Increased transparency and better informed decisions over land and investment
- Used for advocacy, policy and research
 - # 3 on the Guardian “**List of top 10 sources of data for international development research**”
- Some statistics since 2012
 - 165,000 website visits
 - 20,000 database downloads
 - 250 citations of 1st Analytical Report



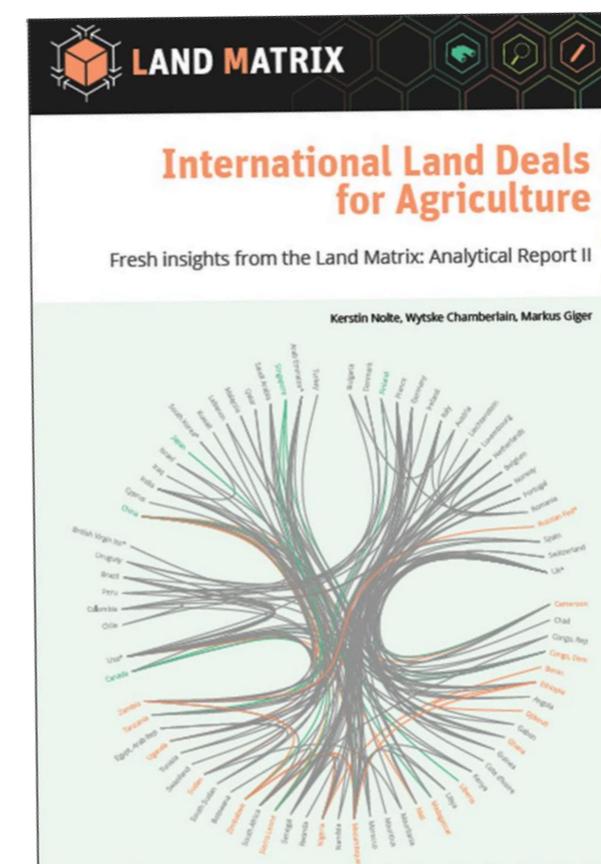
This presentation

- Overview of overall phenomenon of large-scale land acquisitions
- Particular attention to earlier and more recent trends
- Scope: concluded agricultural deals since 2000 with international investment partner
- Based on Analytical report 2016 and recent updates

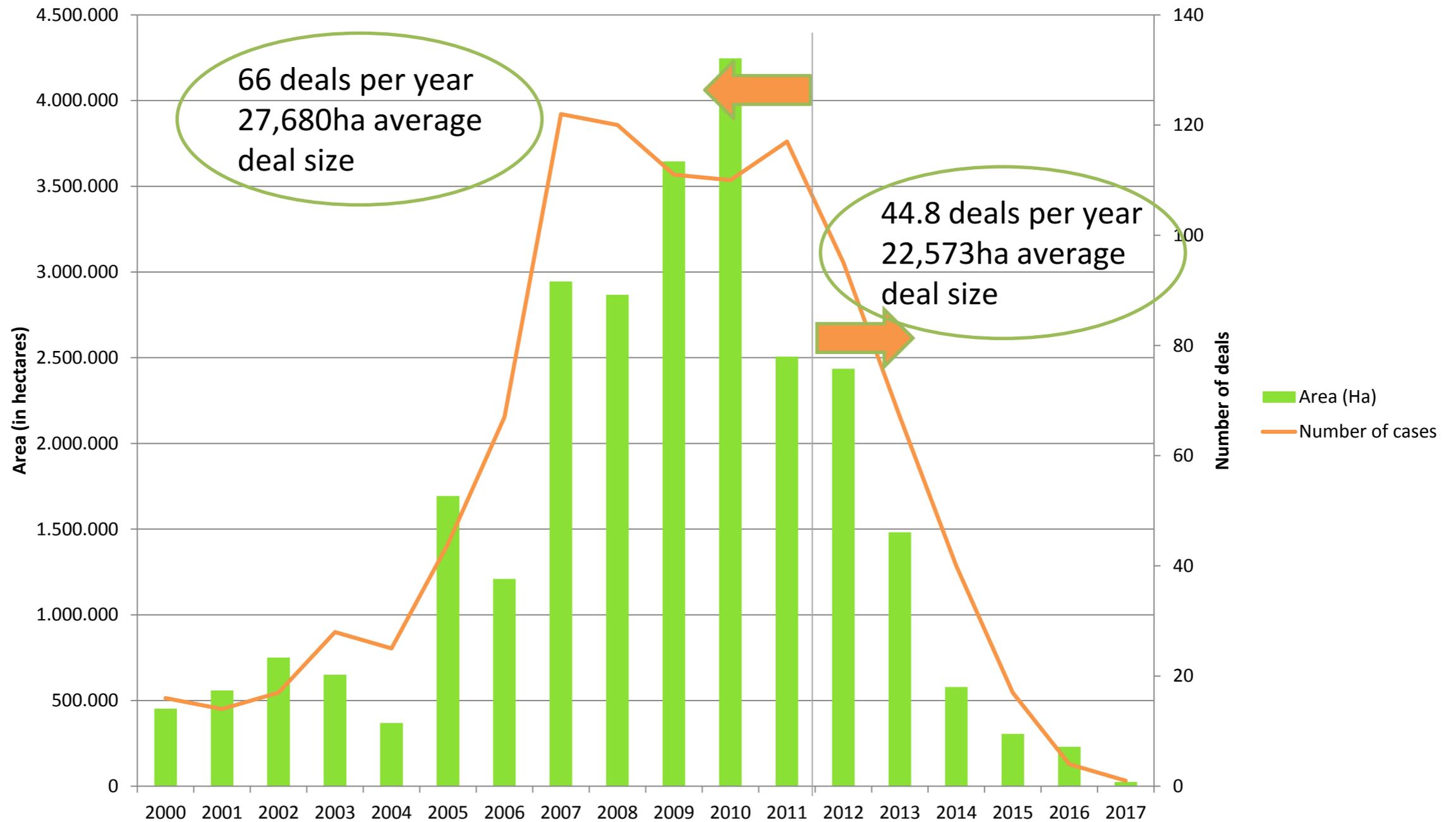


Overall figures

- 1,079 concluded deals with agricultural intention since 2000
- Area size under contract of nearly 30 million hectares



Development over time



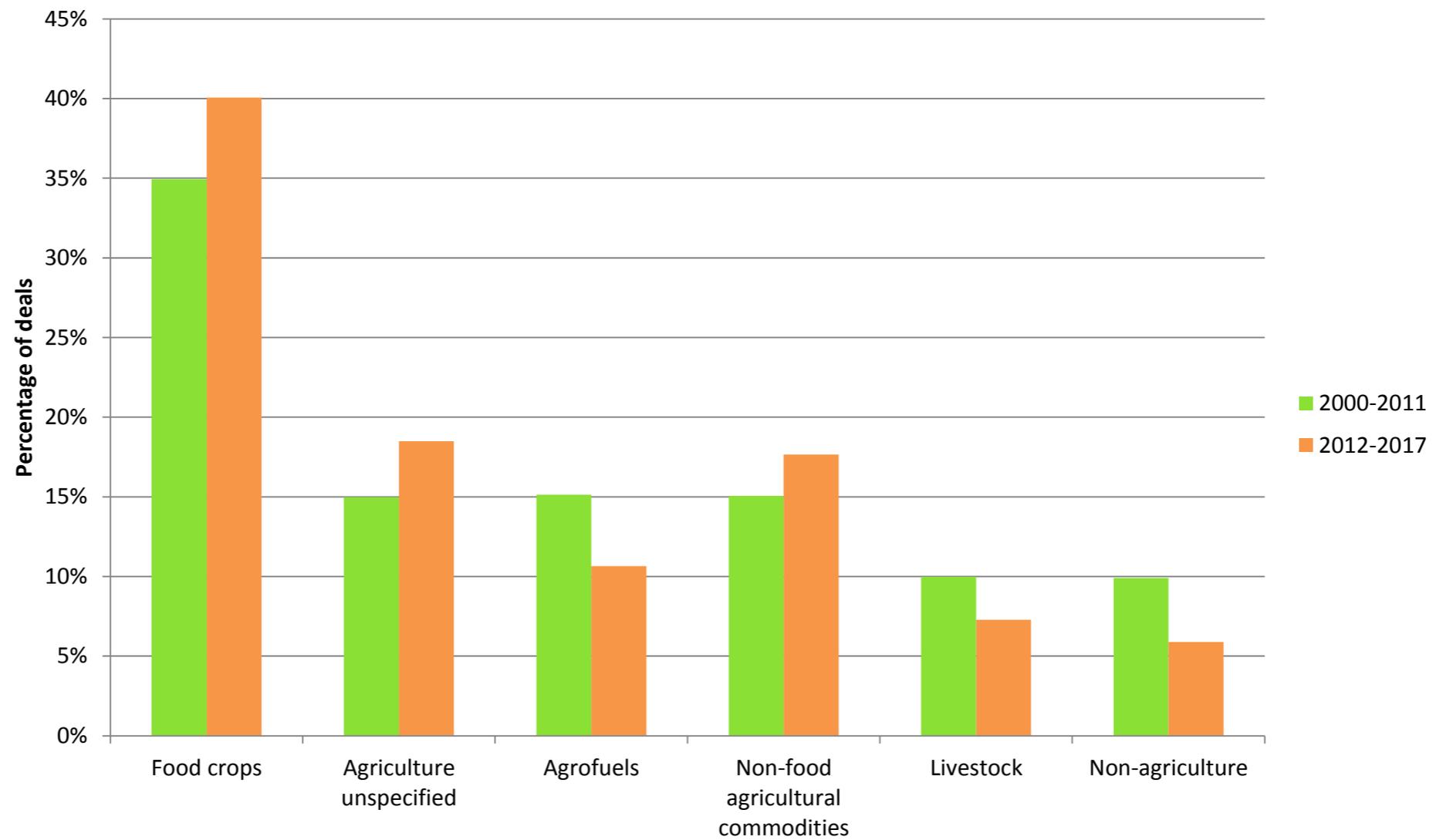
Increasing implementation

IMPLEMENTATION STATUS	NUMBER OF CONCLUDED DEALS		CONTRACT SIZE (MILLION HECTARES)		SIZE IN PRODUCTION (MILLION HECTARES)	
	June 2013	April 2017	June 2013	April 2017	June 2013	April 2017
Project not started	49	60	3.4	2.7	n/a	n/a
Start-up phase (no production)	69	115	2.4	1.9	n/a	n/a
In operation (production)	323	656	12.0	17.5	1.7	7.3
Project abandoned	35	50	2.1	1.7	n/a	n/a
No information	279	198	12.4	4.2	n/a	n/a
Total	755	1079	32.3	28.0	1.7	7.3

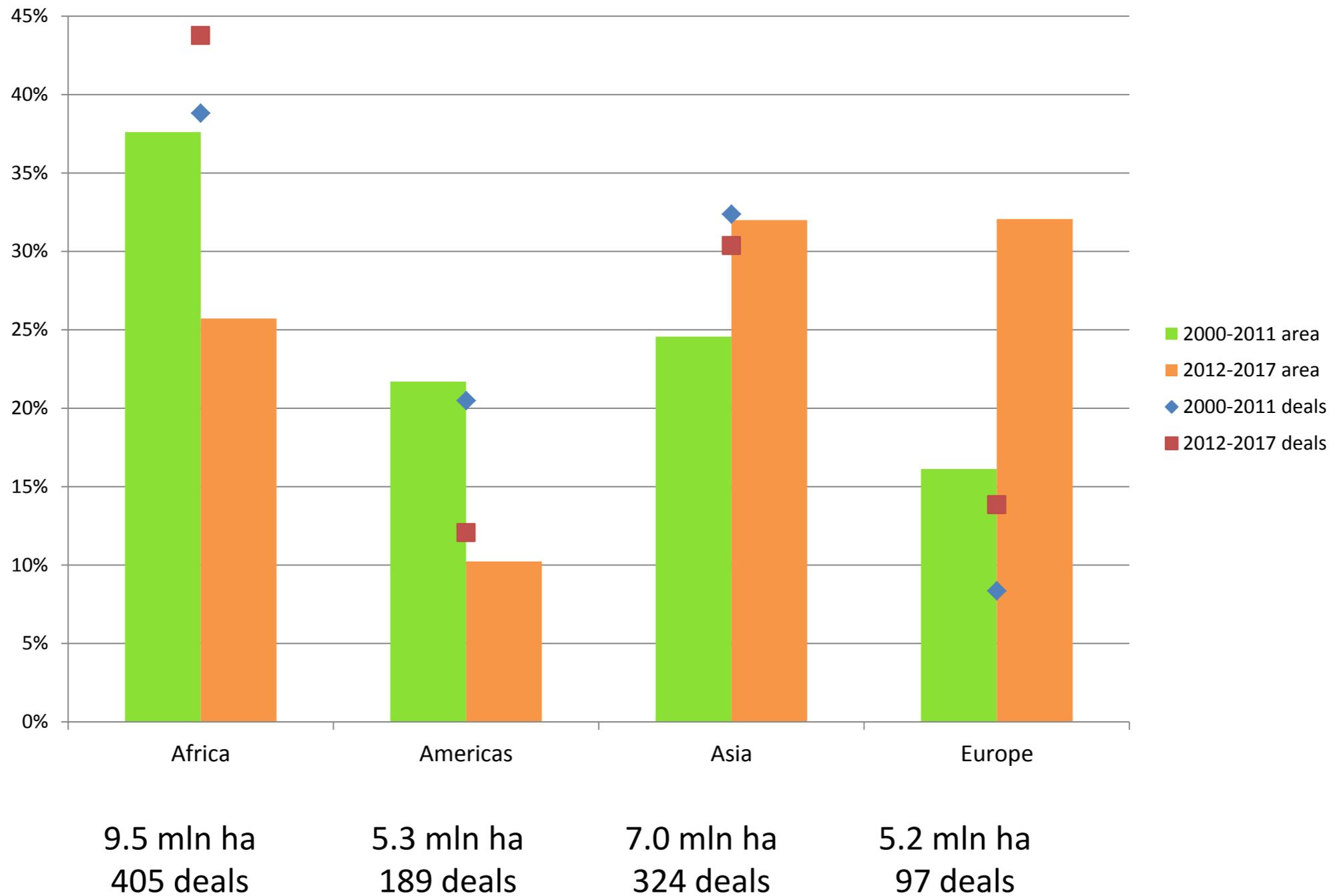
71.5% of all concluded deals have activities on the land



Focus on food crops

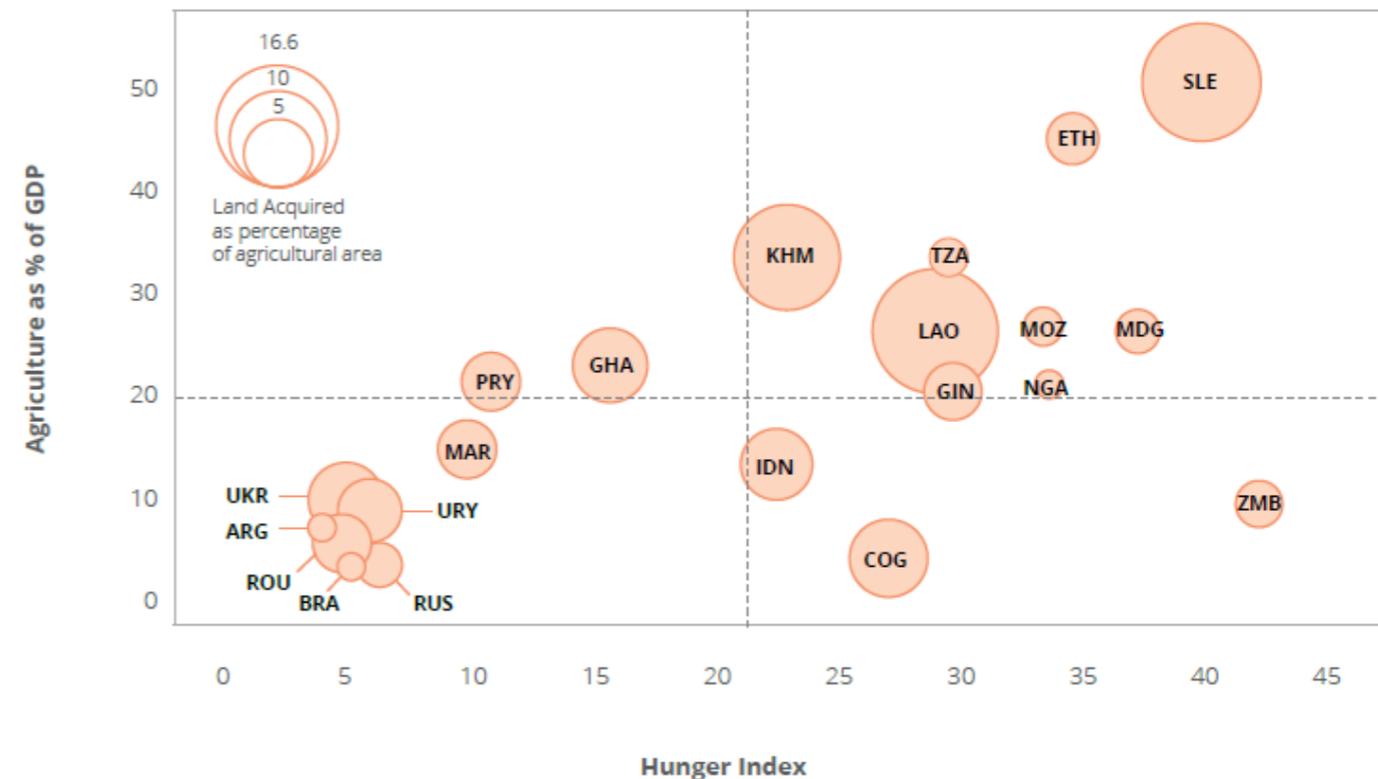
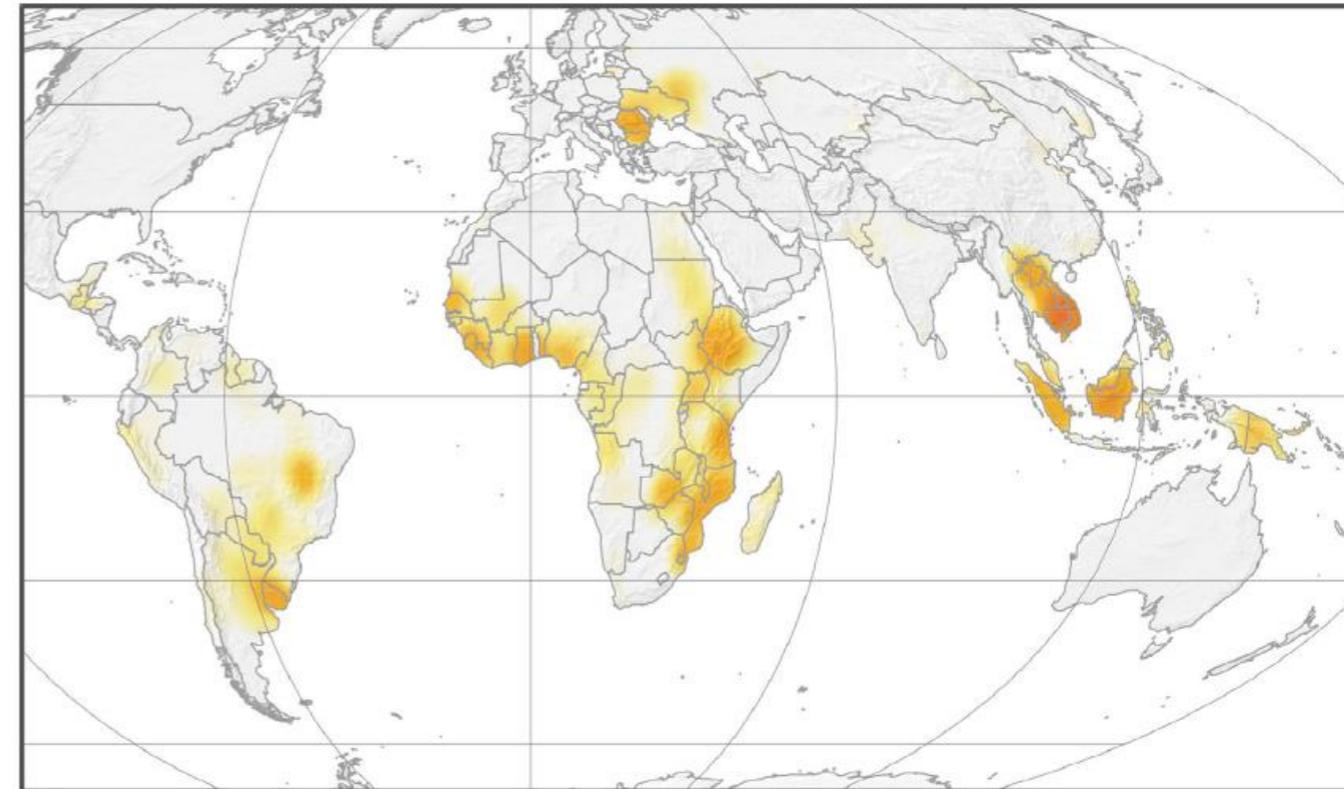


Where?



Where exactly?

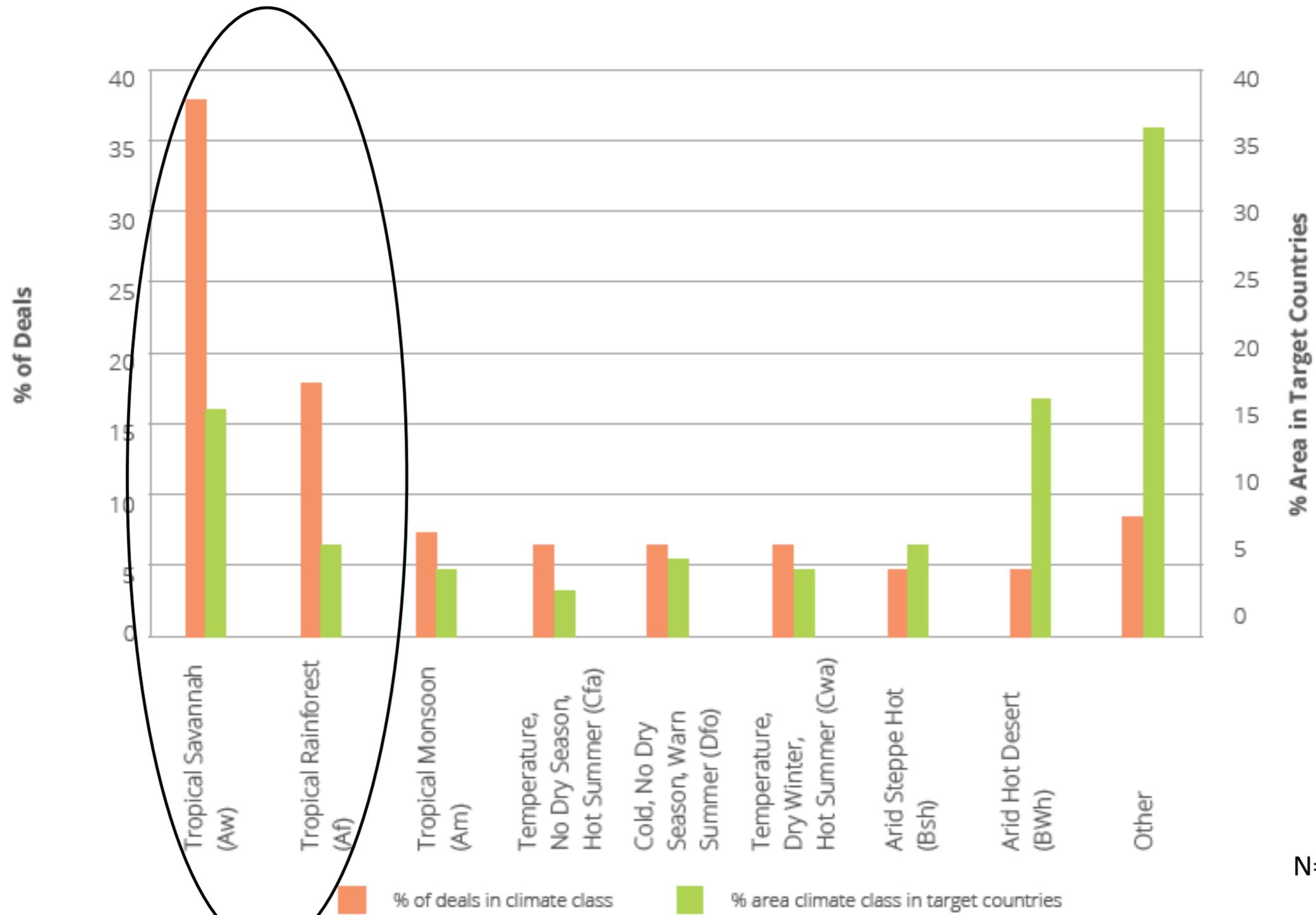
Host country	Number of deals	Area under contract (Ha)	Rank 2000-2011	Rank 2012-2017
Indonesia	116	3 096 334	4	1
Ukraine	23	2 426 690	6	2
Russia	25	2 370 816	3	3
Brazil	52	2 296 395	1	11
Papua New Guinea	31	2 169 662	2	30
Argentina	44	1 474 523	5	29
Ghana	34	890 568	7	15
Ethiopia	56	846 894	8	14
South Sudan	3	705 404	9	n/a
Morocco	3	701 531	10	n/a
Congo	5	680 000	14	5
Cambodia	93	669 243	12	10
Liberia	8	609 204	11	n/a
Sudan	18	543 312	22	4
Madagascar	9	541 522	13	28
Zambia	27	519 804	15	16
Paraguay	12	508 411	19	6
Mozambique	60	474 413	20	7
Uruguay	36	448 114	16	17
Sierra Leone	16	425 093	17	20



Green: higher rank 2011-2017 * Red: higher rank 2000-2011 * White: no change



Targeted climate zones



N=941 deals



Diverse and developing investor base

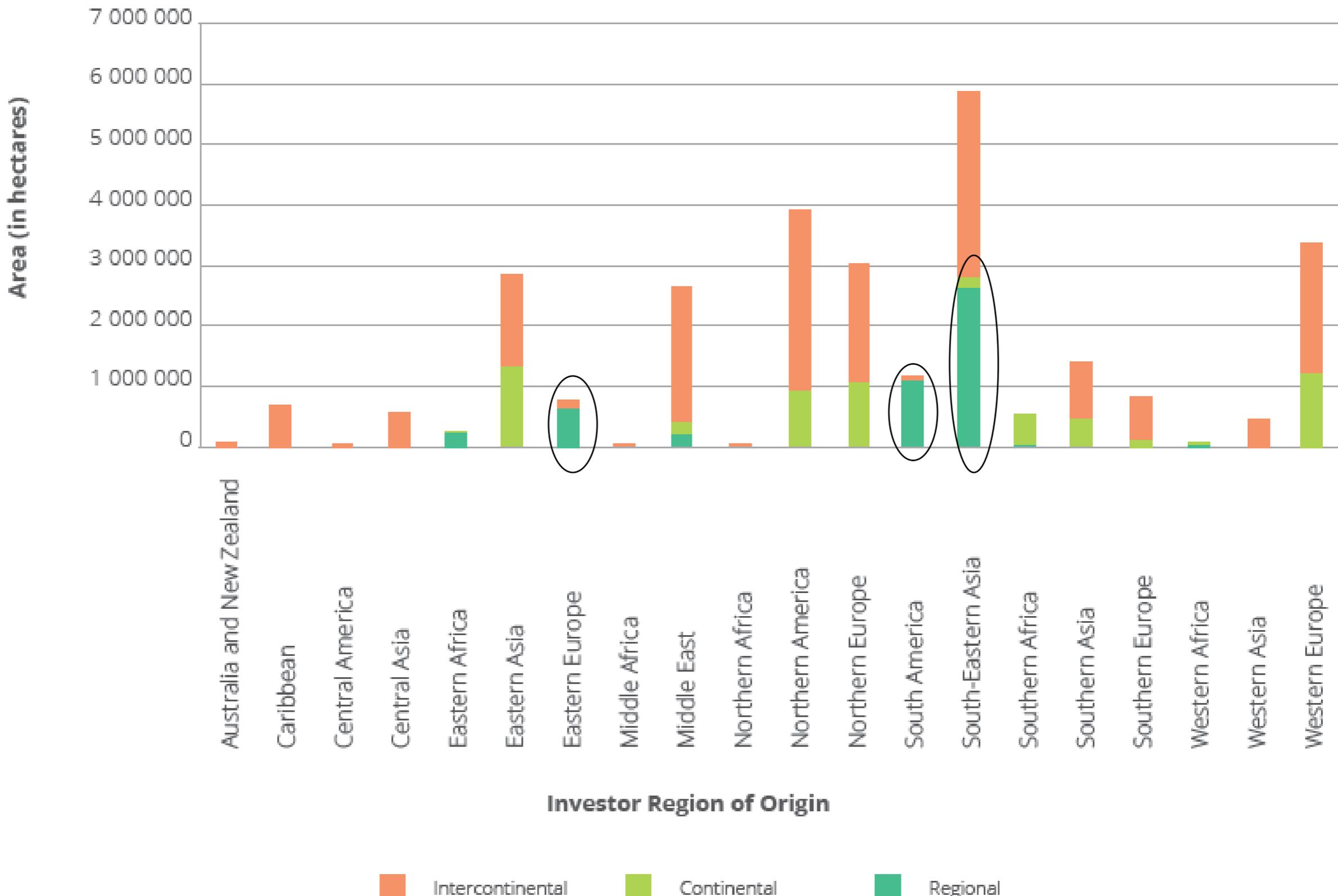
Investor country	Number of deals	Area under contract (Ha)	Rank 2000-2011	Rank 2012-2017
Malaysia	105	3 761 650	2	1
USA	99	3 592 566	1	4
Brazil	33	1 915 720	3	28
UK	106	1 668 054	5	7
Singapore	54	1 639 461	9	2
Saudi Arabia	24	1 475 232	4	29
Netherlands	35	1 414 021	7	6
China	100	1 229 088	11	5
India	45	1 204 946	6	33
British Virgin Islands	5	1 154 000	10	8
Hong Kong	28	1 101 693	8	n/a
Cyprus	7	952 250	17	3
Argentina	32	837 022	12	11
Luxembourg	20	756 436	13	12
France	29	687 778	18	9
Canada	36	648 091	15	18
South Sudan	1	600 000	14	n/a
Kazachstan	3	556 000	16	n/a
Ghana	12	490 358	19	23
South Korea	21	465 137	20	25

67% deals
80% area

Green: higher rank 2011-2017
Red: higher rank 2000-2011



Strong regional patterns for investors from the Global South



Investor type

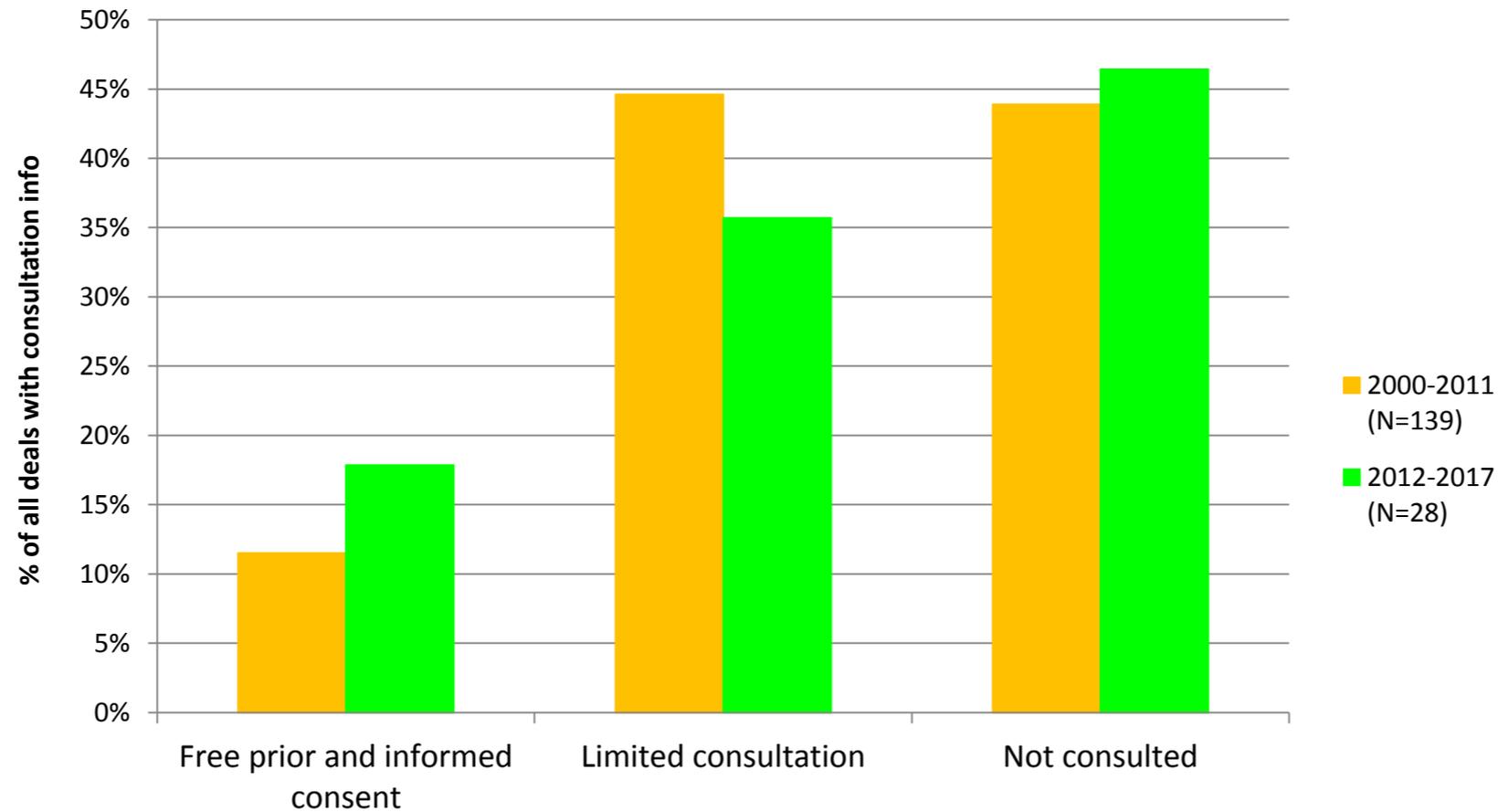
Investor type	Target continent				Total
	Africa	Americas	Asia	Europe	
Private company	4 666	2 746	3 219	2 759	13 389
Stock-exchange listed company	1 979	1 958	3 264	1 901	9 102
No information	2 349	1	750	655	3 166
Investment fund	1 264	984	-	421	2 669
State-/ government(-owned)	928	60	282	42	1 312
Individual entrepreneur	474	259	165	98	996
Other (please specify)	684	1	-	7	698
Semi state-owned company		37	122	-	159

50%

34%

“The key player is clearly the private sector, and not “foreign” governments”

Community consultation



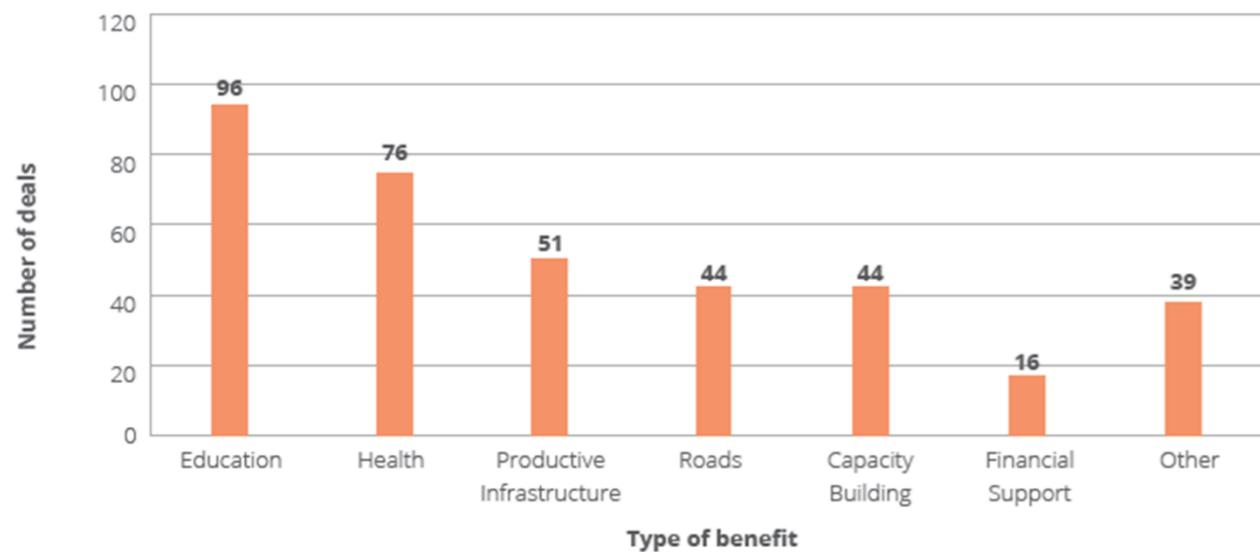
- Only in 2% of all deals do we report FPIC
- But can exclude important groups
- Over 11% of all cases are rejected by the local community



Community impact

- Higher share of deals incorporate land previously owned by the community, a trend more pronounced in more recent deals (especially Africa)
- Community, smallholder and even state-owned land are likely to lead to displacements

Former land owner	2000-2011	2012-2017
Community	34.9%	40.8%
Private (large-scale farm)	33.9%	22.5%
Private (Smallholders)	21.3%	18.3%
State	34.2%	35.2%



- Benefits in form of schools, health facilities, infrastructure
- Financial compensation limited
- Large-scale mechanised farming does not generate jobs, spin-offs
- Implementation of benefits unclear

Summary

- LSLAs continue to take place, and increasingly become operational
- Food crops dominate with increase in size for oil palm, fuel crops are reducing
- Large diversity of investors, with more important role for investors from the Global South who show strong regional preference
- Dominance of private sector, with higher levels of concentration
- Croplands are mostly targeted
- Limited consultation of and approval by local communities





LAND MATRIX
www.landmatrix.org

Further reading

- Nolte, Chamberlain & Giger (2016). *International Land Deals for Agriculture. Fresh Insights from the Land Matrix: Analytical Report II*
- Messerli et al (2014). The geography of large-scale land acquisitions: Analysing socio-ecological patterns of target contexts in the global South. *Applied Geography* 53:449-459
- Oberlack et al (2016). Sustainable livelihoods in the global land rush? Archetypes of livelihood vulnerability and sustainability potentials. *Global Environmental Change* 41:153-171
- Lay & Nolte (2017). Determinants of foreign land acquisitions in low- and middle-income countries. *Journal of Economic Geography* doi: 10.1093/jeg/lbx011
- Nolte & Ostermeier (2017). Labour Market Effects of Large-Scale Agricultural Investment: Conceptual Considerations and Estimated Employment Effects. *World Development* <https://doi.org/10.1016/j.worlddev.2017.05.012>

Report land deals

Website: www.landmatrix.org

Twitter: [@Land_Matrix](https://twitter.com/Land_Matrix)

FB: [Land Matrix](https://www.facebook.com/Land_Matrix)