Database characteristics

- **Key features:**
  - Aims at overcoming persistent lack of information about global land acquisitions
  - Crowd-sourced approach: media, reports, research papers, etc.
  - Verifying reliability through cross-checking, questionnaires
  - Living dataset

- **What is covered by the LAND matrix?**
  - Concessions, leases, sales of land
  - Criteria: investment size > 200ha, recent transaction (2000-2010)
  - Several sectors but deals mainly for agricultural use

- **Main variables:**
  - Information on target country, investor, and deal

- **Reliability of the data:**
  - 0: Press reports etc.
  - 1: Government records and company websites, research papers
  - 2: Cross-checked deals
  - 3: Contractual agreements known
The land rush is real

<table>
<thead>
<tr>
<th></th>
<th>Total LSLA for agriculture</th>
<th>LSLA with contracts signed</th>
<th>LSLAs where production started</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td># Deals</td>
<td>M ha</td>
<td># Deals</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>1217</td>
<td>83.2</td>
<td>403</td>
</tr>
<tr>
<td><strong>Only reported</strong></td>
<td>592</td>
<td>50.5</td>
<td>180</td>
</tr>
<tr>
<td><strong>Reliable</strong></td>
<td>625</td>
<td>32.7</td>
<td>223</td>
</tr>
</tbody>
</table>

- Large amounts of land
- 88 target countries and 73 origin countries of investors
Where are investments targeted?

- Deals are concentrated on specific regions and countries (70% of surface in 11 countries)
- Africa is the most targeted region (7/11 countries)
Land cover analysis of 246 geo-referenced deals

<table>
<thead>
<tr>
<th></th>
<th>Share of deals</th>
<th>Share of surface</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cropland</td>
<td>43%</td>
<td>22%</td>
</tr>
<tr>
<td>Forest land</td>
<td>24%</td>
<td>31%</td>
</tr>
<tr>
<td>Shrub- and grassland</td>
<td>28%</td>
<td>17%</td>
</tr>
<tr>
<td>Marginal and other land</td>
<td>5%</td>
<td>30%</td>
</tr>
</tbody>
</table>

- Investor compete with farming communities
- The majority of deals are within a daytrip from nearest city (accessibility < 3h);
- 60% of all deals target areas with population densities > 25 persons/km²
Who are the investors?

The origin of investment – to 20 countries

- Three groups of investor countries;
- Intra-regional transactions: new regionalism
Land acquisitions per type of investors

- Partnership with domestic partners: 12%
- Foreign investors in partnership with each other
What is driving the land rush?

Land acquisitions by category of production, number of projects and size

- Flex crops (soybean, sugarcane, oil palm) allow for flexibility of investment
- Export is the principal aim of production
- 43% of exports target country of origin of investor

Chart showing:
- 34% Food crop
- 26% Non-food crop
- 23% Flex crop
- 17% Multiple use

Legend:
- Reliable cases
- Only reported cases
- Total Cumulative Size
- Reliable Cumulative Size

Land Matrix
landportal.info/landmatrix
How do large-scale land acquisitions take place, and what are the impacts?

<table>
<thead>
<tr>
<th>Former land use</th>
<th>Former legal land owner</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Smallholder Agriculture</strong></td>
<td><strong>State</strong></td>
</tr>
<tr>
<td>56</td>
<td>51</td>
</tr>
<tr>
<td><strong>Common Pool</strong></td>
<td><strong>Smallholder (Private)</strong></td>
</tr>
<tr>
<td>16</td>
<td>14</td>
</tr>
<tr>
<td><strong>Forest/ Conservation</strong></td>
<td><strong>Community</strong></td>
</tr>
<tr>
<td>7</td>
<td>14</td>
</tr>
<tr>
<td><strong>Commercial Agriculture</strong></td>
<td><strong>Private Company</strong></td>
</tr>
<tr>
<td>3</td>
<td>11</td>
</tr>
</tbody>
</table>

- Governments are selling land that is used by smallholders;
- Limited or full consultation only in 35 of 86 reported cases;
- Low rates of compensation in diverse forms;
- Reported but limited evidence on benefits for local communities: infrastructure improvements, access to markets, employment.

Land Matrix
landportal.info/landmatrix
Challenges and the road ahead

- Land acquisitions do take place – and deals are in fact implemented
  - World-wide phenomenon but concentration on Africa
  - Variety of actors, differing investment motives
  - Lack of transparency

- Evidence suggests
  - Competition with existing agriculture
  - Countries with weak land governance systems seem to be attractive
  - Local population left out in decision-making processes

- Structural change from smallholder to commercial agriculture is surrounded by secrecy
  - Need for information on processes & impacts
  - Role of international and national legislation? Codes of Conducts?
More information available in the report...

Available at: www.landportal.info/landmatrix