Transnational Land Deals for Agriculture in the Global South
Analytical Report based on the Land Matrix Database

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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, etc.

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

Main variables:
- Information on target country, investor, investment, and deal
- Reliability ranking

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>Total</td>
<td>1217</td>
<td>83.2</td>
<td>403</td>
</tr>
<tr>
<td>Only reported</td>
<td>592</td>
<td>50.5</td>
<td>180</td>
</tr>
<tr>
<td>Reliable</td>
<td>625</td>
<td>32.7</td>
<td>223</td>
</tr>
</tbody>
</table>

- Total area 44% larger than WB estimation
- 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) with 5% of its agricultural area concerned
Land cover analysis of 246 geo-referenced deals

<table>
<thead>
<tr>
<th>Land Type</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

[Graph showing investment origin to 20 countries with specific data points for each country, indicating the number of deals and the amount of investment for different countries.]
- 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
How do large-scale land acquisitions take place, and what are the impacts?

**Former land use**

<table>
<thead>
<tr>
<th>Land Use</th>
<th>N=82</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smallholder</td>
<td>56</td>
</tr>
<tr>
<td>Common Pool</td>
<td>16</td>
</tr>
<tr>
<td>Forest/ Conservation</td>
<td>7</td>
</tr>
<tr>
<td>Commercial Agriculture</td>
<td>3</td>
</tr>
</tbody>
</table>

**Former legal land owner**

<table>
<thead>
<tr>
<th>Legal Owner</th>
<th>N=90</th>
</tr>
</thead>
<tbody>
<tr>
<td>State</td>
<td>51</td>
</tr>
<tr>
<td>Smallholder (Private)</td>
<td>14</td>
</tr>
<tr>
<td>Community</td>
<td>14</td>
</tr>
<tr>
<td>Private Company</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.
The Land Matrix is an online public database of large-scale land deals. It provides a visualisation of records documenting land deals since 2000. The data you can explore represent about 50% of the entire database. The remaining deals are being crosschecked and added, together with new data provided, on an ongoing basis. The visualisations offer an overview of the data as well as giving full access to the public database down to the level of an individual deal. ... READ MORE

WE DOCUMENTED 1,006 DEALS SINCE THE YEAR 2000
AMOUNTING TO 70,217,083 HA OF LAND
WHICH EQUALS THE SIZE OF HALF OF WESTERN EUROPE

10% OF INVESTORS ACCOUNT FOR
79% OF THE ACQUIRED LAND
48% OF THE LAND ACQUIRED IS IN AFRICA

MORE ...
More information available in the report... to be launched on 26 April 2012

Available at:
www.landportal.info/landmatrix