Land under pressure - The state of large-scale land acquisitions in the World

Preliminary Results from the Land Matrix Partnership (ILC, CDE, CIRAD, GIGA, GIZ)

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Presentation of the Land Matrix

- Problem: lack of information about land deals
- Objectives: trace, verify, publish deals
  - Transparency, accountability
  - Data for research and policy-making
- Core: Land matrix database
- Subset to be made public in 2012
- Analytical report launch with the public interface
Presentation of the Land MATRIX

1) 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

2) Reliability of the data
   • 0: Press reports etc.
   • 1: Government records and company websites, Research papers
   • 2: Cross-checked deals
   • 3: Contractual agreements known

considered reliable
Global overview & focus on agriculture

1. Global quantification
   - **1668 deals** concerning **105 million ha** (agriculture, forestry, mining, tourism, industry, conservation)
   - Agriculture is the main focus

2. Focus on deals for agricultural use

<table>
<thead>
<tr>
<th></th>
<th>Nb of deals</th>
<th>Area (in million ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total reported deals</td>
<td>1217</td>
<td>83,2</td>
</tr>
<tr>
<td>Deals with area data</td>
<td>917</td>
<td>83,2</td>
</tr>
<tr>
<td>Deals with production information</td>
<td>925</td>
<td>67,8</td>
</tr>
<tr>
<td>Deals with contract signed</td>
<td>403</td>
<td>26,2</td>
</tr>
</tbody>
</table>

- Total area 44% larger than WB estimation
- 88 target countries and 73 origin countries of investors
Insights into actors

- Where do the investment take place?
  - Global perspective
  - National level: most targeted countries, economic, institutional and agro ecological characteristics
  - Local level: yield gap, accessibility, former land cover
Concentration of acquisitions

70% of the reported rush for land is concentrated in 11 countries (7 of them are African countries)
Insights into actors

• Who are the investors?
  – Type of investors
  – Strategies (domestic partners, multiple investors)
  – Investor’s origin countries
Where do investors come from?
Analysis of the drivers

• “Watergrab”?  
• Food, non-food, flex crops?  
• Destination of the production
Drivers:
Importance of Production Purpose
Processes and impacts

- The Land tenure security question?
- Former land use vs former land owner
- Involvement of the community
- Displacement
- Potential benefits
Whose land is sold?

**Former Land Use**

- Smallholder Agriculture: 56
- Common Pool: 16
- Forest/Conservation: 7
- Commercial Agriculture: 3

**Former Land Owner**

- State: 51
- Smallholder: 14
- Community: 14
- Private Company: 11

Source: Authors’ calculations based on the LM. N = 82, considering only agricultural deals.

Source: Authors’ calculations based on the LM. N = 90, considering only agricultural deals.
Summary of the main messages

- Database in itself a major outcome for policy makers and researchers – ongoing process

- Target countries: Concentration of Acquisitions: 11 countries attract 70% of LSLA, 7 of them in Africa

- Investors: Intra-Regionalism vs colonial ties

- New trend in globalized world: Outsource production to meet growing world-wide demand

- Fears seem to be true: Lack of involvement!

- Problem of poor land governance in target countries
Thanks for your attention!

Any questions?