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Domestic land deals in the Land Matrix

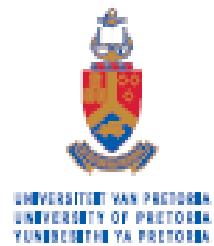
Workshop “Responsible land governance in the context of
local investment in land and agriculture”

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GIGA German Institute of Global and Area Studies
Member of the Land Matrix Steering Committee

The Land Matrix Initiative

The LMI partners are:



INTERNATIONAL
LAND
COALITION



G I G A
German Institute of Global and Area Studies
Lehrstuhl für Global und Regionale Studien



With the support of:



Outline

- The Land Matrix Initiative (LMI)
 - What is the LMI?
 - Some recent insights from the data
- Domestic deals in the Land Matrix
 - How are domestic/local investments reflected in the data
 - Country example: Zambia
- Outlook: Better capturing domestic deals in the Land Matrix



What is the LMI?

- **Land Matrix:** A global and independent land monitoring initiative that promotes transparency and accountability in decisions over land investments
- **Website** key product: An open tool for collecting and visualising information about large-scale land acquisitions at global, regional and national level
- Data represented is constantly evolving
- **LMI decentralizes:** Regional partners and focal points, national observatories (new website to be launched)



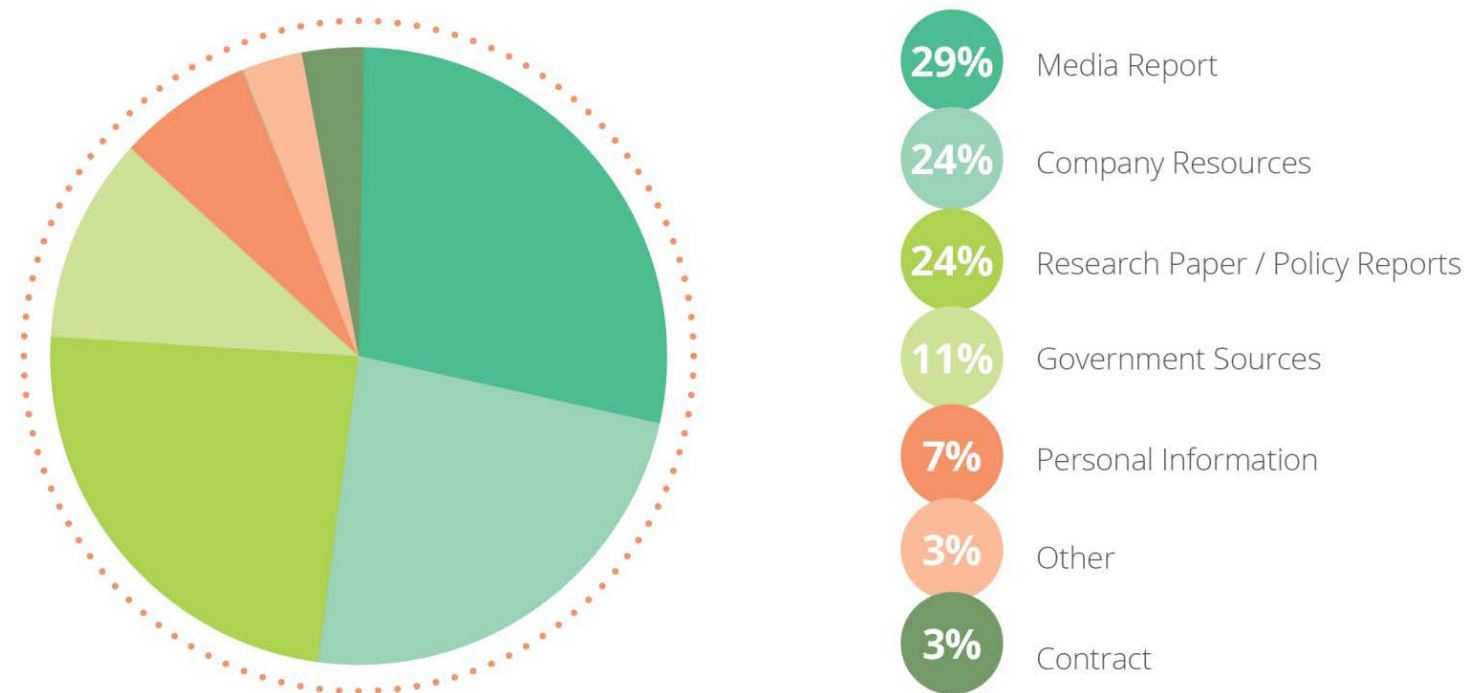
What the Land Matrix reports and sources

- **Deal:** Intended, concluded or failed attempt to acquire land through purchase, lease or concession in low- and middle-income countries
- **Purposes:** Agricultural production, timber extraction, carbon trading, industry, mining, renewable energy production, conservation, and tourism
- **Criteria** for inclusion of deals
 - *Entail a transfer of rights to use/control/own land through sale, lease or concession*
 - *Have been initiated since the year 2000, cover an area of 200 hectares or more*
 - *Potential conversion of land from smallholder, local community use or ecosystem services to commercial use*
- Records are derived from a variety of **sources**, including:
 - *Research papers and policy reports*
 - *Personal information*
 - *Field-based research projects*
 - *Official government records*
 - *Company websites and publications such as annual reports*
 - *Media reports*



Sources of information on land deals

Figure 1: All sources in the Land Matrix



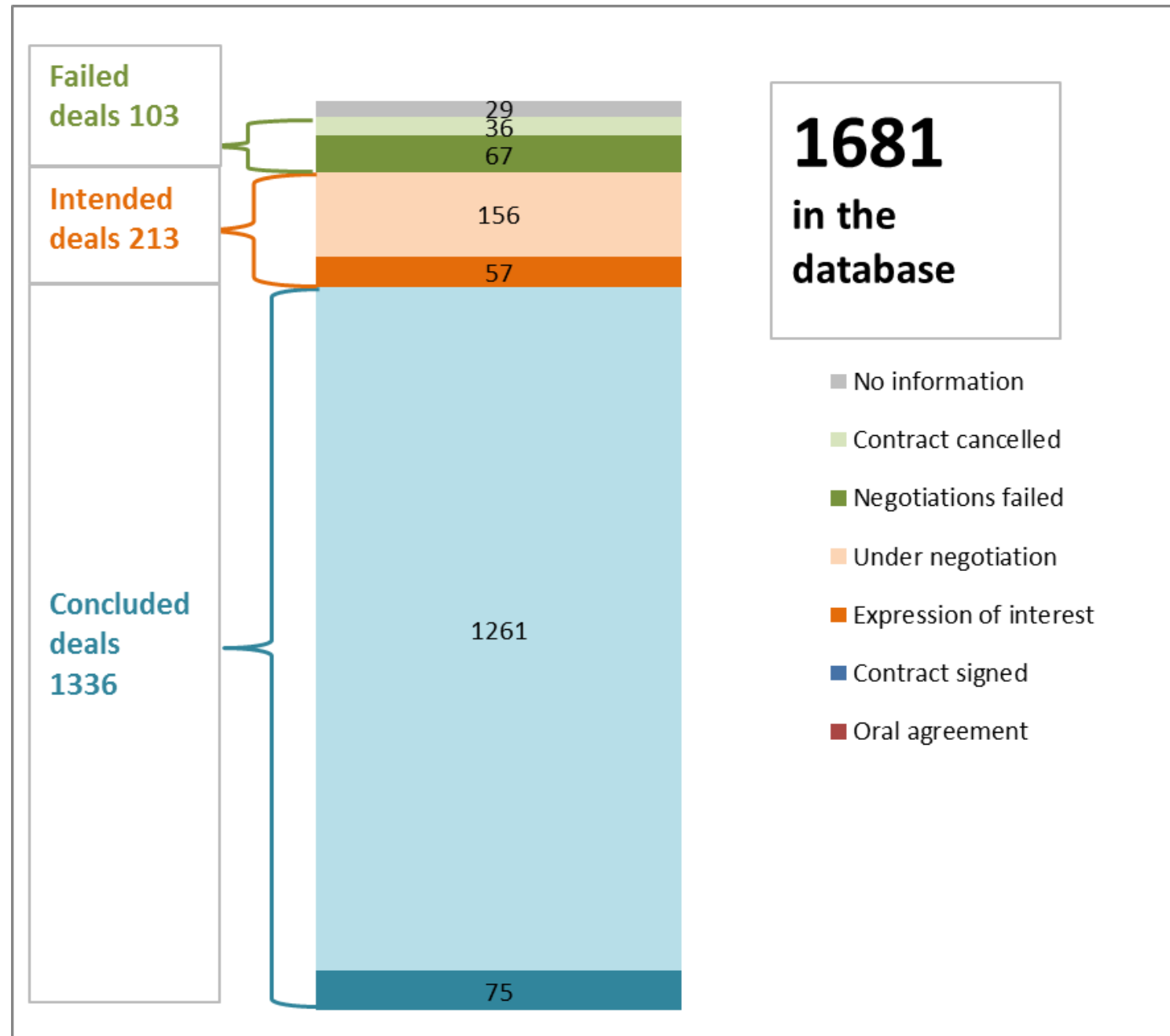
Note: N (deals) = 2,155, N (sources) = 5,056. For most deals several sources are given; double-counting is included.
Source: Authors' calculation based on Land Matrix data, April 2016.

- Information is triangulated: Only 6% of all deals have media reports as a sole source



Insights and focus to date:

International land deals



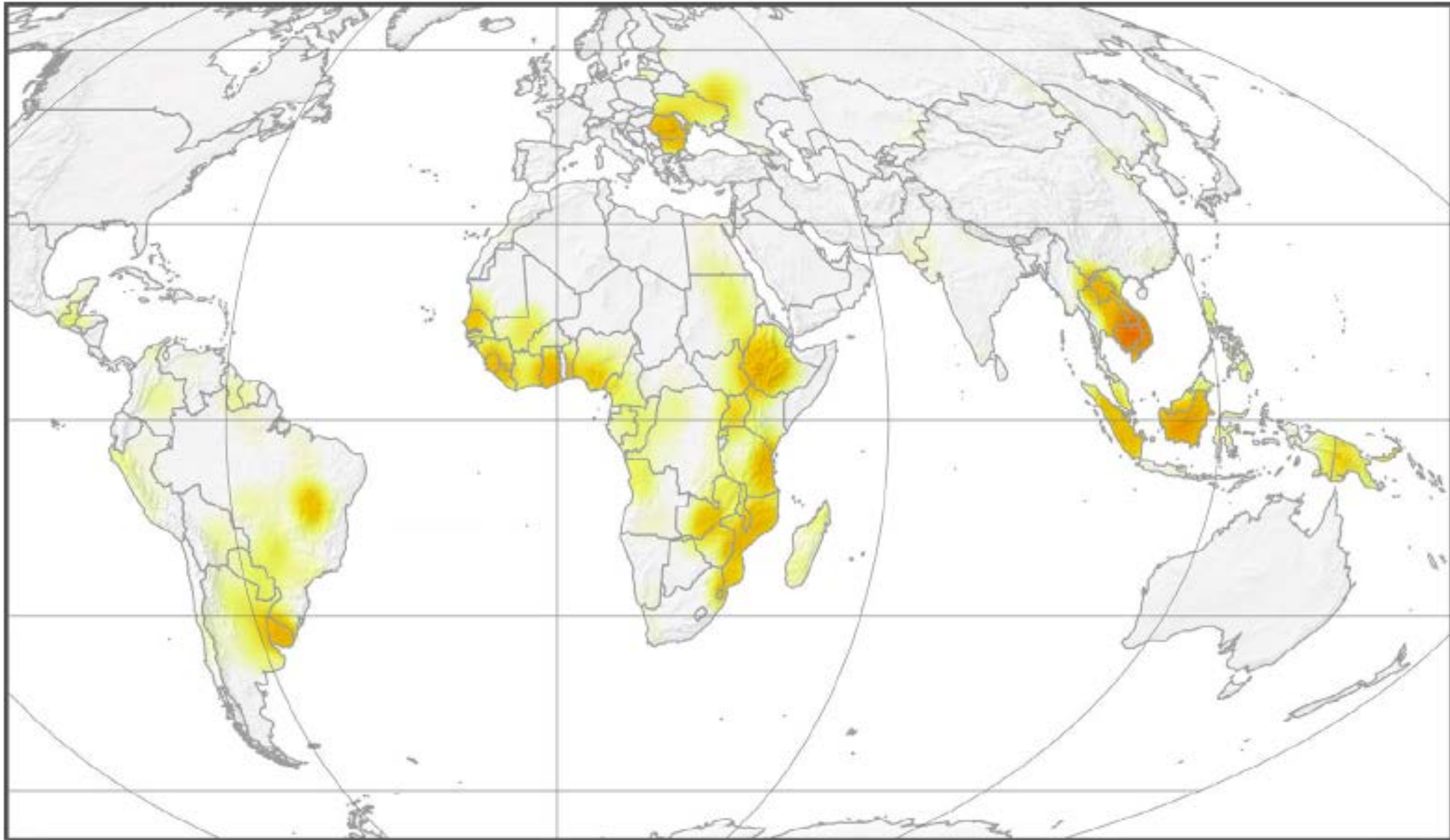
Dynamics of international agricultural investment: Ongoing implementation

Implementation status	Number of concluded deals		Contract size		Size under production	
	June 17	Jun 13	June 17	Jun 13	June 17	Jun 13
Project not started	60	49	2.6	3.4	n.a.	n.a.
Startup phase (no production)	113	69	1.9	2.4	n.a.	n.a.
In operation (production)	663	323	17.6	12,0	7.4	1.7
Project abandoned	51	35	1.7	2.1	n.a.	n.a.
No information	198	279	3.9	12.4	n.a.	n.a.
Total	1085	755	26,8	32,3	6,407227	1,7

70%



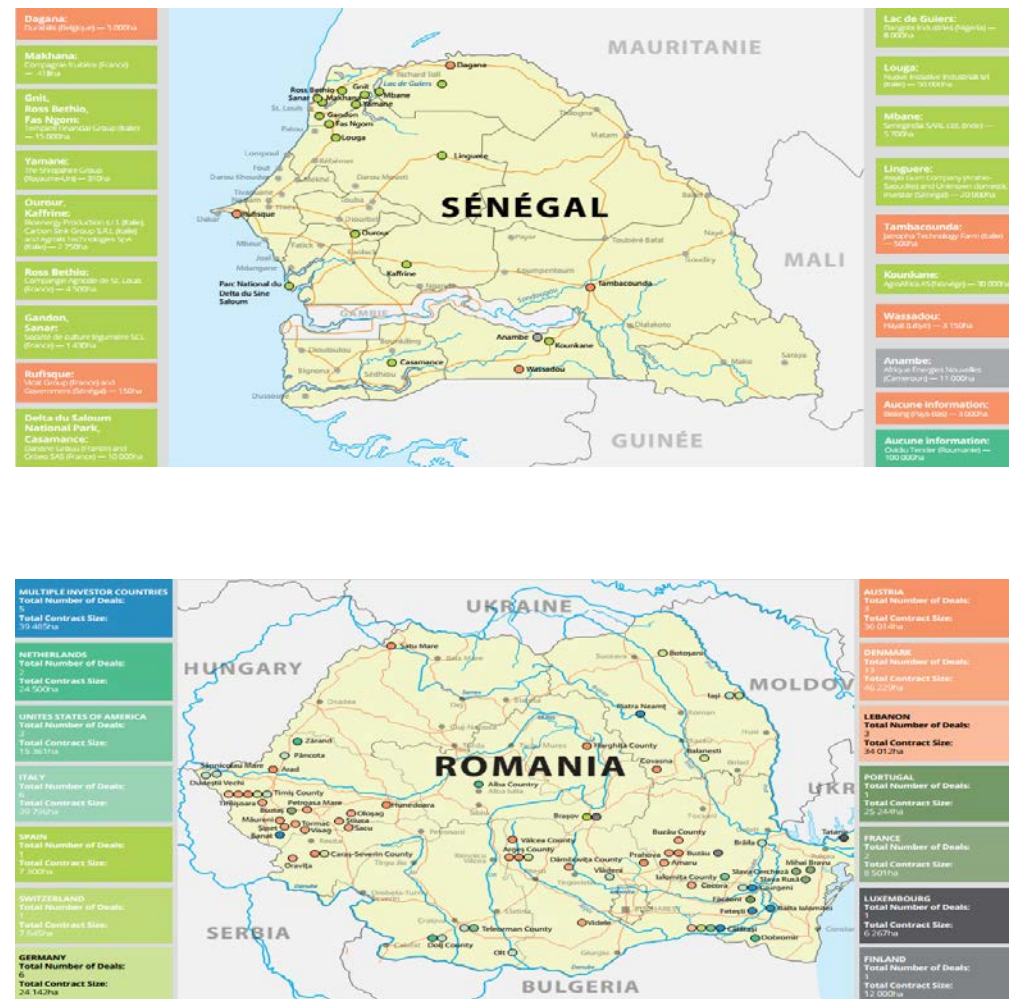
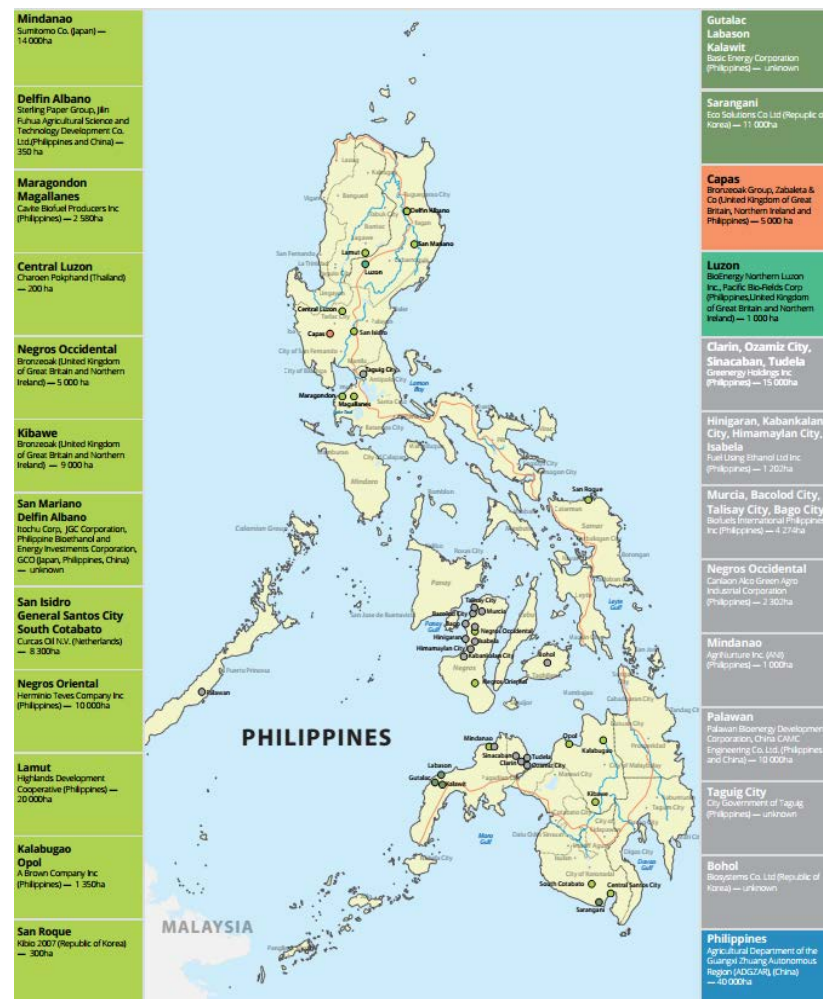
Hotspots of international land acquisitions



Projection: Mollweide
Map: Manuel Abebe



Country-level information: Country profiles on webpage



Domestic deals in the Land Matrix

- Focus of the LMI to date: International land transactions
 - Policy/public interest in these deals
 - Reporting bias: Starting point of inclusion in the database often media/NGO/research report
- Criteria for consideration in database do **NOT exclude domestic deals**, BUT default settings on website exclude “domestic”
- Origin of investors can be used to distinguish between international and domestic deals
- Land Matrix data (today) reports
 - Primary investor (business managing the project, per definition domestic private company, i.e. where the deal is located)
 - Secondary investor(s): “top” parent company (or companies) and/or partners of joint ventures (excluding intermediaries/subsidiaries between primary investor and secondary investor)



Domestic and international investors (and caveats)

- Allows to distinguish
 - Foreign investment (only foreign “secondary” investors)
 - Foreign investment (with at least one domestic “secondary” investor)
 - Domestic investment (no or no foreign secondary investor)
- Problems and caveats
 - Tracing investor chains difficult, information on ownership structure not well reflected, possibly very incomplete
 - In some countries, business managing project can be foreign, ex. Romania
 - In general: LM information likely to be biased against domestic owners/investors



Domestic deals in the LMI: Data

	Number of concluded deals	Size of concluded deals (in million hectares)	Africa, Number of concluded deals	Africa, Size of concl. deals (in million hectares)
Foreign investment (only foreign “secondary” investors)	920	34.1	362	8
Foreign investment (with at least one domestic “secondary” investor)	165	11.5	92	2.4
Domestic investment (no or no foreign secondary investor)	471	5.1	150	2.7



Modes of domestic involvement:

Two cases

- Domestic investment (ID 1371): Mumias Sugar, Western Kenya, 16000 ha lease
 - Developed as joint venture together with Tana/Athi River Authority (TARDA)
 - Mumias: Kenyan sugar manufacturing company, majority held by the Kenyan government (71%), but: 17% Commonwealth Development Corporation (UK) not reported in the data (today)
- Foreign investment (with at least one domestic “secondary” investor) (ID 1141): SOSUCAM, Cameroon, 6720 ha lease
 - Developed as joint venture between Somdiaa, France (73%), Cameroonian government and private shareholders



Country example: Zambia

Contrasting data from

Land Matrix

Country	Frequency	Hectares
Foreign (including)	27	185,873
- Germany	2	32,700
- South Africa	7	47,859
- United Kingdom	4	30,172
- Zimbabwe	4	45,700
Zambia	67	117,416
Total	94	303,289

Zambia's Central Statistical Office

Country	Frequency	Hectares
Foreign (including)	120	188,766
- Germany	3	32,572
- Netherlands	5	10,148
- South Africa	22	35,447
- United Kingdom	24	39,619
- Zimbabwe	35	31,004
Zambia	368	313,188
Total	488	501,954



Outlook

- Key improvement in upcoming version of LM data: Investor tree
 - Business managing project
 - Parent company (can be multiple, and multiple layers “parent of parent”, including details on ownership)
 - “Tertiary” investors/lenders (various types: banks, investment funds etc.)
- Implies that it is possible to display whole investment chain (including loan sizes, shareholdings etc.)
- Decentralization and national observatories will (very likely) lead to a better representation of “domestic deals”
- Improved data and analysis to better understand and differentiate the different modes of “domestic involvement”





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Thank you
Questions / Comments / Suggestions

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Backup slide: Land Matrix National Observatories

- Multi-stakeholder Land Governance Platform
 - With different partnership models
 - With different foci (according to partner needs)
- Different degrees of integration
 - Partnership with LMI, example: South Africa Land Observatory (no integration of database, but information exchange)
 - Integrated Observatories
 - Integrated database
 - Demand-driven features
 - Selection of criteria (ex. which deals to display)
 - National website content



CAMEROON
UGANDA
ARGENTINA
ASIAN
COUNTRY

- Several individual initiatives
- Several demands



Backup slide: LMI support

- Differentiated support for variety of land observatories
 - Software/Website
 - Capacity building (ex. LandAc Summer School)
 - Set-up of multi-stakeholder platform
 - Coordination and link to global database



Backup slides: The new LM platform

- Reflects and supports decentralization
 - Landing page
 - Global Observatory
 - Regional pages (Regional Focal Points)
 - Country pages (National Land Observatories)
- Features
 - Much improved geospatial features (mapping tool, maps, polygon data, context layers)
 - Multiple languages
 - Improved dynamic and investor data, new variables



Landing Page



Global Regions ▾ Countries ▾ Get Involved ▾



Map Data Charts Download Share

The Land Matrix is a global and independent land monitoring initiative that promotes transparency and accountability in decisions over land investments.

This website is an open tool for collecting and visualising information about large-scale land acquisitions at global, regional and national level.

The data represented here is constantly evolving: your participation is essential to make this resource more accurate and comprehensive. [Read more](#)

LARGE SCALE LAND ACQUISITIONS PROFILE SENEGAL

This country profile presents the Land Matrix data for Senegal, detailing large-scale land acquisition (LSLA) transactions that:

- entail a transfer of rights to use, control or own land through sale, lease or concession,
- have an intended size of 200 hectares (ha) or larger,
- have been concluded since the year 2000,
- are affected by a change of land use, or
- include deals for agricultural and forestry purposes.

The objective of this country profile is to present LSLA data at national level to a broad panel of stakeholders, stimulating broad engagement and data exchange, facilitating the continuous improvement of the data. The data used in this profile was

NEW Senegal country profile released

GLOBAL OBSERVATORY

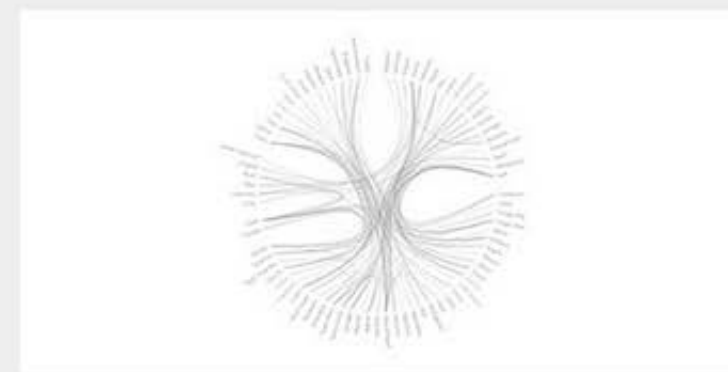
Map



Data

Target Country	Operational Company	Source of land acquisition	Intention of the transaction	Agreement status	Transaction status	Investment size in ha	Size under contract, lease or concession area, in ha
India	Adani Power Private Ltd	India	2008	Under negotiation	2008	Project not started	200
India	Poona India	Republic of Korea	2008	Oral agreement	2014	Start-up phase (no production)	2,408
Argentina	Glencore Canada	Argentina	2007	Regulatory fulfil	Unknown	800	Unknown
Chile	Miguel Torres Chile	Spain	2006	Contract signed	2006	In operation (production)	406
Colombia	Emmerson D. Labrador	Colombia	2007	Contract signed	2007	In operation (production)	1,707
Uruguay	Adventagro SA	Qatar, United States of America	2006	Contract signed	2006	In operation (production)	5,101
Bulgaria	Ceres Agri Growth Investment Fund	Austria, Bulgaria, United States of America	2006	Contract	2006	In operation (production)	25,000

Charts



Maps: LandMark context layer



Global Regions ▾ Countries ▾ Get Involved ▾



Default filters are enabled. The data is filtered by global or national filter presets. Please uncheck the checkbox to show all data. [Read more](#)

Active Filters: **Concluded** ✕ + Add a filter

Context layers

- ☐ Land Cover ⓘ
- ☐ Global Cropland ⓘ
- ☒ Indigenous Lands ⓘ
 - Formal documentation**
 - ☐ Formal documentation
 - In process of documentation**
 - ☐ In process of documentation
 - No documentation**
 - ☐ No documentation
 - Formal land petition**
 - ☐ Formal land petition
 - Occupied or used without formal land petition**
 - ☐ Occupied or used without formal land petition
- Source: [LandMark](#)
- ☒ Community Lands ⓘ
 - Formal documentation**
 - ☐ Formal documentation
 - In process of documentation**
 - ☐ In process of documentation
 - No documentation**
 - ☐ No documentation
 - Formal land petition**
 - ☐ Formal land petition
 - Occupied or used without formal land petition**
 - ☐ Occupied or used without formal land petition
- Source: [LandMark](#)

