# LAND MATRIX

# LARGE SCALE LAND ACQUISITIONS PROFILE CAMBODIA

This country profile presents the Land Matrix data for Cambodia, 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 use (often from extensive or ecosystem service provision to commercial use);
- include deals for agricultural and forestry purposes. Mining operations are excluded.

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 downloaded on 2018.[1]

[1] Land Matrix Cambodia deals database: click here

## TABLE OF CONTENTS



**Table 1:** Key socio-economic and institutional indicators.

| BASIC SOCIO-ECONOMIC CHARACTERISTICS | |
|---|---|
| Population (million, 2016)[2] | 15.76 |
| Total Land ('000 hectares, 2017)[3] | 17.652 |
| Total Agricultural Land ('000 hectares, 2016)[4] | 4.145 |
| Total Arable land ('000 hectares)[2] | 21.5 |
| Total Arable land (as a % of total land) (ha)[5] | 27 |
| Contribution of agriculture to GDP (2016, %)[2] | 8.4 |
| Food imports (% of merchandise imports, 2016)[6] | 4.78 |
| Food exports (% of merchandise exports, 2016)[7] | 5 |
| **INSTITUTIONAL VARIABLES** | |
| Political stability index (%, 2016)[8] | 0.2 |
| Voice accountability index (%, 2016)[9] | -1.1 |
| Government effectiveness index (%, 2016)[10] | -0.7 |
| Control of corruption index (%, 2016)[11] | -1.3 |
| Investor protection rank (2017)[12] | 94 |

[2] http://databank.worldbank.org/data/views/reports/reportwidget.aspx?Report_Name=CountryProfile&Id=b450fd57&tbar=y&dd=y&inf=n&zm=n&country=KHM
[3] https://data.worldbank.org/indicator/AG.LND.TOTL.K2?view=chart (converted to hectares from sq.km)
[4] https://data.worldbank.org/indicator/AG.LND.AGRI.K2?view=chart (converted to hectares from sq.km)
[5] https://data.worldbank.org/indicator/AG.LND.ARBL.ZS?view=chart
[6] https://data.worldbank.org/indicator/TM.VAL.FOOD.ZS.UN?locations=KH
[7] https://data.worldbank.org/indicator/TX.VAL.FOOD.ZS.UN?locations=KH
[8] http://databank.worldbank.org/data/reports.aspx?source=worldwide-governance-indicators
[9] http://databank.worldbank.org/data/reports.aspx?source=worldwide-governance-indicators
[10] http://databank.worldbank.org/data/reports.aspx?source=worldwide-governance-indicators
[11] http://databank.worldbank.org/data/reports.aspx?source=worldwide-governance-indicators
[12] http://reports.weforum.org/global-competitiveness-index-2017-2018/competitiveness-rankings/

# CONCLUDED AGRICULTURAL LAND DEALS IN CAMBODIA

**MULTIPLE INVESTOR COUNTRIES**
**Total Number of Deals:**
13
**Total Contract Size:**
86 825ha

**CANADA**
**Total Number of Deals:**
1
**Total Contract Size:**
20ha

**CHINA**
**Total Number of Deals:**
21
**Total Contract Size:**
208 696ha

**DENMARK**
**Total Number of Deals:**
1
**Total Contract Size:**
4 000ha

**FRANCE**
**Total Number of Deals:**
2
**Total Contract Size:**
537ha

**INDIA**
**Total Number of Deals:**
1
**Total Contract Size:**
635ha

**MALAYSIA**
**Total Number of Deals:**
10
**Total Contract Size:**
81 585ha


**REPUBLIC OF KOREA**
**Total Number of Deals:**
6
**Total Contract Size:**
58 629ha

**SINGAPORE**
**Total Number of Deals:**
4
**Total Contract Size:**
36 322ha

**SRI LANKA**
**Total Number of Deals:**
2
**Total Contract Size:**
11 877ha

**THAILAND**
**Total Number of Deals:**
5
**Total Contract Size:**
35 436ha

**UNITED STATES OF AMERICA**
**Total Number of Deals:**
2
**Total Contract Size:**
11 877ha

**VIETNAM**
**Total Number of Deals:**
33
**Total Contract Size:**
223 283ha

**NO INFORMATION**
**Total Number of Deals:**
5
**Total Contract Size:**
31 002ha

**Figure 1:** Map of the distribution of the Land Deals in Cambodia.

Hover over the information pane to reflect the location of the deal on the map.

# OVERVIEW OF LARGE-SCALE LAND ACQUISITIONS

**Table 2:** Dynamics of international large-scale land acquisitions according to negotiation status.

| | NUMBER OF DEALS | TOTAL CONTRACT SIZE PER NEGOTIATION STATUS (HECTARES) |
|---|---|---|
| Contract signed | 156 | 1 545 098 |
| Oral agreement | 4 | 18 471 |
| **Failed** | **11** | **85 870** |
| Expression of interest | 1 | 8 692 |
| Under negotiation | 1 | 25 000 |
| **Total** | **173** | **1 658 131** |

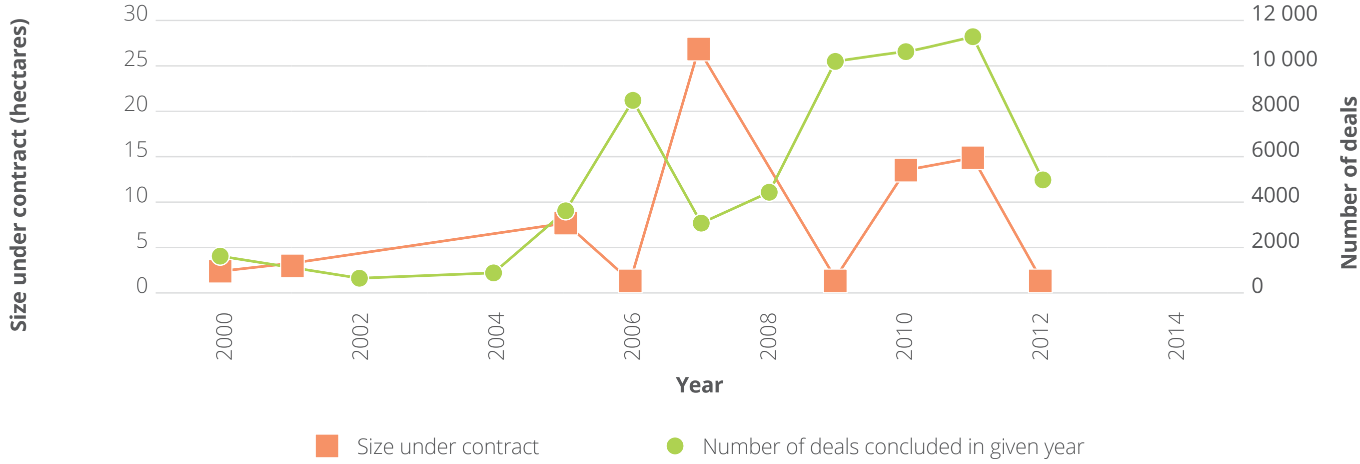
- Almost all of the large scale land acquisition (LSLA) deals were concluded accounting for 92.5% of all deals in the country. 90% of these deals have already been signed which makes it harder to have these deals canceled or nullified despite possibilities that these deals have violated existing laws and policies governing land concessions in the country.
- The failed deals or contracts which were canceled account for only 6% of all the deals, while the intended deals account for 1.2% of all deals. What is worth noting though is that the failed deals were canceled due to violations of local policies such as encroachment in protected areas and national parks.
- The number of hectares under contract would seem small as it only covers 0.86% of the total land area of the country. However, the number of hectares under contract already covers 37.7% of the total arable lands of the country. This may have grave implications on the country's food security and food self-sufficiency.

**Table 3:** Concluded deals according to implementation status.

| IMPLEMENTATION STATUS | NUMBER OF CONCLUDED DEALS | SIZE UNDER CONTRACT (HA) | AVERAGE SIZE UNDER CONTRACT (HA) | CURRENT SIZE UNDER PRODUCTION (HA) | AVERAGE SIZE UNDER PRODUCTION (HA) |
|---|---|---|---|---|---|
| In operation | 48 | 738 793 | 15 391.52083 | 34 251 | 2 014.764706 |
| Project abandoned | 1 | 9.800 | 9 800 | n.a. | n.a. |
| Project not started | 8 | 63 029 | 7 878.625 | n.a. | n.a. |
| Startup phase (no production) | 38 | 333 783 | 8 783.763158 | 1 730 | 432.5 |
| No Information | 65 | 418 164 | 6 533.8125 | n.a. | n.a. |
| **Total** | **160** | **1 563 569** | **9 833.767296** | **35 981** | **1 713.380952** |

- Out of the 160 concluded deals, 30% are currently operational while 23.8% are already in the start-up phase. The promised benefits for the deals that are just starting operation and those that has yet to operate would still take time before being delivered. For those already operational and already raking in profits, this would imply a harder struggle for communities to have the deals canceled even if there are cases of environmental and human rights violations.
- The deals that were abandoned only accounts for 0.6% of all the deals and the major reasons cited by investors for abandoning the deals were failed contracts and conflicts in the agreement between parties.
- Given that only minimum information is available regarding the deals, the implementation status of 40% of the deals remain unknown.

**Figure 2:** Concluded deals over time (2000 to 2012).




Note: 10 deals covering 8,545 hectares were not included in this table since information when the contracts covering these deals were signed were not available.

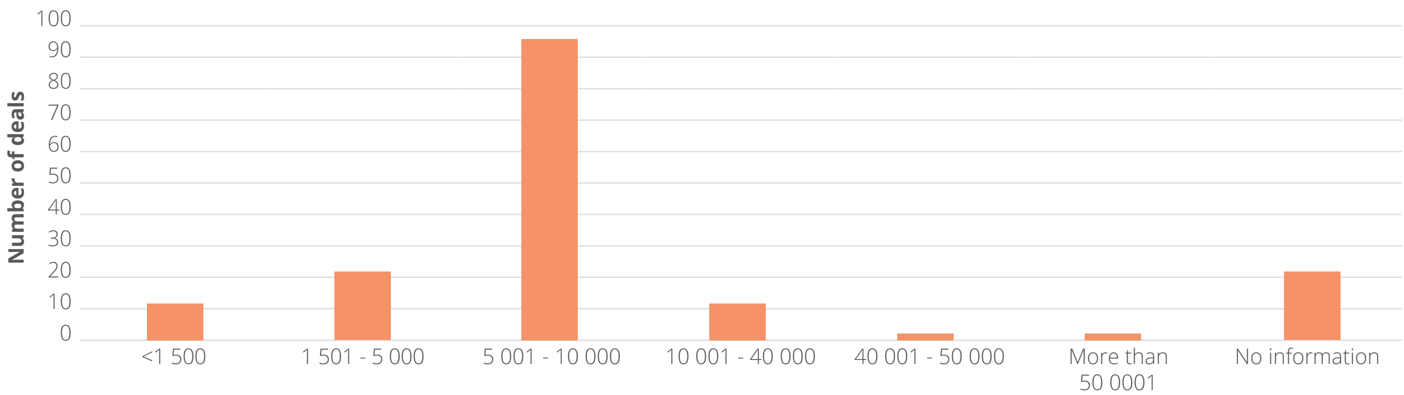
- The number of concluded deals increased slowly from 2001 to 2005 but increased dramatically in 2006. There was a steady rise until 2011, then the number of deals suddenly decreased in 2012. This may be due the passage of new policies or stricter implementation of current policies governing land concessions.
- The size of deals increased noticeably in 2007, declined in 2009 and rose again in 2010 before drastically dropping in 2012. This may be caused by new policies or stricter implementation of the current policies.

**Table 4:** Nature of the deal (concluded deals).

| NATURE OF DEAL | NUMBER OF DEALS |
|---|---|
| Lease/Concession | 155 |
| Outright purchase | 3 |
| Outright purchase and lease/concession | 3 |
| No information | 12 |
| **TOTAL** | **173** |

- Majority or 90% of the 173 concluded deals are under lease/concession arrangements. 1% of the deals show that lands were purchased outright, while 1% was a mix of lease/ concession and outright purchase. 7% or 12 deals have no information whether these were leases, concessions or outright purchase.

**Figure 3:** Concluded deals according to contract size.




- 60% of the deals cover an area between 5 001 to 10 000 hectares possibly due to the current policy of the country limiting each investment to only 10 000 has of land each. The policy aims to control the size of land granted per investor. It is notable though that there are 13 deals that go beyond the 10 000 hectare per investment rule, probably because these deals were already negotiated before the policy was implemented. Some investors though have gone around the policy by dividing their investments to deals that are lower than 10 000 has and which were owned by a "subsidiary" of the parent company.

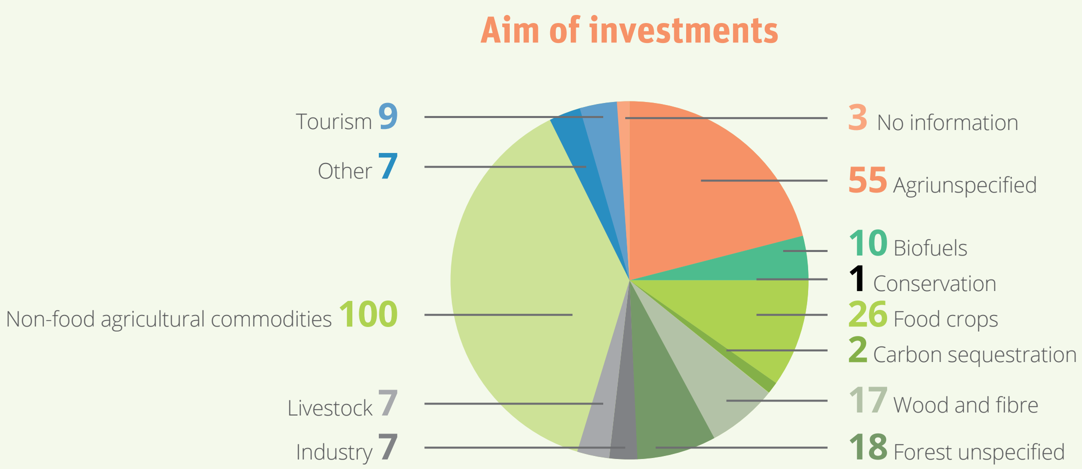
**Table 5:** International investor countries (concluded deals).

| INVESTOR COUNTRIES | | SIZE UNDER CONTRACT (HA) | NUMBER OF DEALS CONCLUDED |
|---|---|---|---|
| Asia and the Pacific | Cambodia | 703 356 | 60 |
| | China | 227 728 | 29 |
| | India | 7 635 | 1 |
| | Hong Kong Special Administrative Region | 30 991 | 4 |
| | Malaysia | 81 585 | 10 |
| | Republic of Korea | 53 373 | 7 |
| | Singapore | 36 322 | 4 |
| | Sri Lanka | 11 877 | 2 |
| | Thailand | 54 536 | 8 |
| | Vietnam | 234 541 | 39 |
| | Australia | 2 572 | 2 |
| Africa | United Arab Emirates | | 1 |
| North America | Canada | 5 020 | 3 |
| | United States of America | 23 800 | 3 |
| Europe | Denmark | 9 820 | 2 |
| | France | 537 | 2 |
| | Luxembourg | 6 978 | 1 |
| | Netherlands | 2 572 | 1 |
| No information | | 37 002 | 6 |

- Interestingly, Cambodia's domestic investors has the highest number of deals with 60 deals covering 703 356 hectares. Vietnam and China are second and third as countries with the most number of deals. Vietnam has 39 deals covering 30% of total number of hectares under contract while China's 29 deals account for 24% of total hectare under contract.
- Majority of investor countries in Vietnam were Asian countries showing that intra-regional investments are gaining ground. Other investors come from North America and Europe.

# AIM OF INVESTMENT

**Figure 4:** Aim of investment (concluded deals)



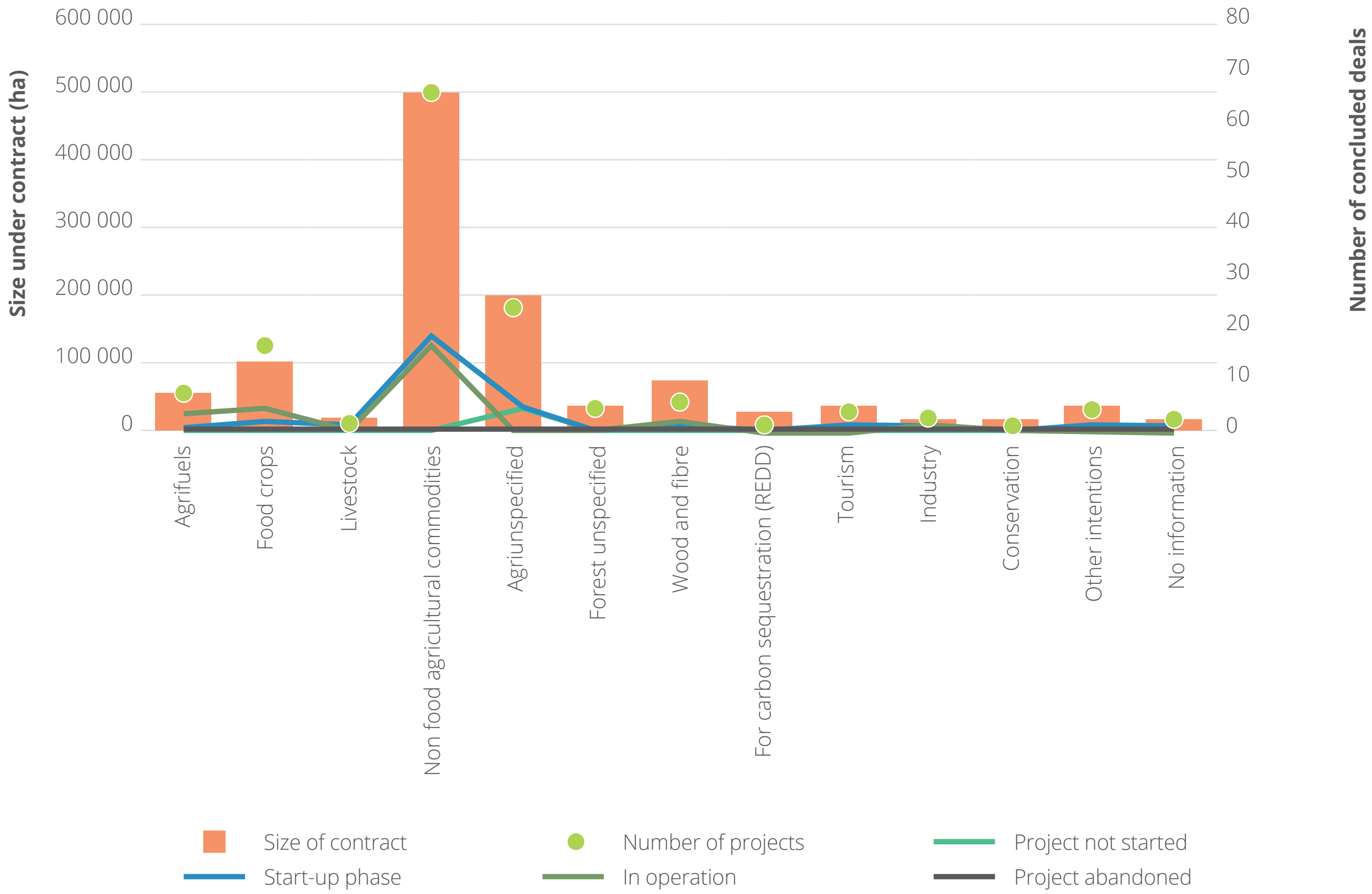

- Non-agricultural commodities with 100 deals and unspecified agricultural processing with 55 deals account for the most number of projects (38% and 20% respectively). However, it must be noted that some deals have multiple aims for investments hence the aim of investments will not correspond exactly to the number of deals per se. Only 26 deals intends to raise food crops which might have possible impacts in the country's food security situation.

**Table 6:** Crops prioritised under the deals.

| CROP | NUMBER OF DEALS |
|---|---|
| Accacia | 22 |
| Apple | 1 |
| Banana | 1 |
| Cashew | 8 |
| Cassava (Maniok) | 17 |
| Coconut | 1 |
| Corn (Maize) | 7 |
| Eucalyptus | 4 |
| Jatropha | 5 |
| Oil Palm | 6 |
| Pine | 2 |
| Rice | 2 |
| Rubber | 98 |
| Sugar (no specification) | 1 |
| Sugar Cane | 17 |
| Teak | 8 |
| Trees | 21 |
| Castor Oil Plant | 1 |
| Vegetables | 1 |
| Fruit | 1 |
| Mango | 1 |

- Rubber is the main product of 98 deals which is equivalent to 44% of the total number of deals. This can prove advantageous in terms of the carbon sequestration capacity of rubber trees, but environmentally problematic as well since rubber trees are mono crops. This again may have adverse implications to the country's food security especially for the subsistence of small farmers.
- Among the food products, only sugar cane has a notable number of deals with 18 deals. Most of the products being produced by the land deals are trees ideal for timber production like Acacia, Teak and Eucalyptus. Again, this may impact the country's food security negatively.

**Figure 5:** Number of concluded deals, size per contract and aim of investment, and status of projects for concluded deals.




- Non-food agricultural production has the largest size under contract; it also has the highest number of operational deals, deal that are in the start-up phase and the total number of deals in general.

## FORMER LAND USE

**Table 7:** Former land use (number of concluded deals).

| FORMER USE | NUMBER OF DEALS |
|---|---|
| Conservation | 18 |
| Forestry | 19 |
| Other | 5 |
| Pastoralism | 11 |
| Smallholder agriculture | 43 |
| No Information | 108 |

- The former land use in 70% or 108 of the concluded deals were unknown or has not been indicated. 28% of the deals were formerly lands tilled by smallholders, 12% were formerly forests and 12% were formerly allocated for conservation purposes.

## HOW LAND DEALS ARE IMPLEMENTED

**Table 8:** Community reaction to the deals (concluded deals).

| COMMUNITY REACTION | NUMBER OF DEALS |
|---|---|
| Consent | 1 |
| Mixed reaction | 5 |
| No Information | 110 |
| Rejection | 57 |

- There is no available information in 110 or 70% of the concluded deals how the community reacted to the large-scale land acquisitions. Communities in 57 of the concluded deals have rejected the deals though these were concluded nonetheless. Only 1 deal has reported that they have secured the consent of communities affected by their investment.

**Table 9:** Involvement of the community in the concluded deals.

| COMMUNITY CONSULTATION | NUMBER OF DEALS |
|---|---|
| Free prior and informed consent | 2 |
| Limited consultation | 10 |
| No information | 131 |

- There is no available information in 131 or 84% of the concluded deals if the communities were involved in consultations about the large-scale land acquisitions happening in their community. Communities in 2 of the concluded deals related that their free, prior and informed consent have been secured, while communities covered by 10 deals said that they have been consulted in a limited capacity.

## DATA FIELDS WHICH WERE NOT INCLUDED IN THIS COUNTRY PROFILE DUE TO A LACK OF DATA

**Please help us enhance the data, by contributing to the following fields:**

- In-country processing activities
- Water usage
- Former legal land owner
- Number of projects with reported evictions
- Involvement of the community in pre-contract negotiations
- Compensation received by communities
- Reported and actual community benefits
- Foreign and domestic employment (planned and actual)

**WE HAVE SOME INFORMATION ON SOME OF THESE ITEMS, BUT IMPROVEMENTS AND ADDITIONS WOULD BE WELCOME**

## CONTRIBUTE!

The purpose of the Country Profile brief is to enhance data and data quality. Please help us to achieve this by directly contributing to **www.landmatrix.org**

## HOW TO CONTRIBUTE

If you would like to comment, contribute to the data, or obtain additional information.

- Contact the Land Matrix directly on **www.landmatrix.org/en/get-involved/**
- Add comments on existing land deals **www.landmatrix.org**
- Contact: **Carmina F. Obanil** afamenchie@asianfarmers.org or carmina.flores.obanil@gmail.com)
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  afalorraine@gmail.com

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